

Apr 13, 2021

Reference 360

Cloud-Native Self-Service Reference Data Management

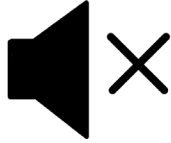
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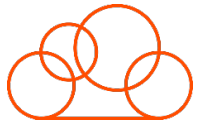


Housekeeping Tips



- Today's Webinar is scheduled for **1 hour**
- The session will include a webcast and then your questions will be answered live at the end of the presentation
- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to "All Panelists" via the **Q&A option** and we will respond at the end of the presentation
- The webinar is **being recorded** and will be available on our **INFASupport YouTube channel** and **Success Portal** - where you can download the **slide deck** for the presentation. The link to the recording will be emailed as well.
- Please take time to complete the **post-webinar survey** and provide your feedback and suggestions for upcoming topics.

Feature Rich Success Portal



Bootstrap trial and
POC Customers



Enriched Customer
Onboarding
experience



Product Learning
Paths and Weekly
Expert Sessions



Informatica
Concierge



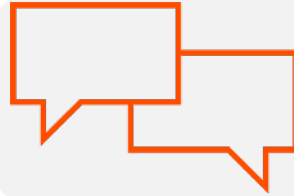
Tailored training and
content
recommendations

More Information



Success Portal

<https://success.informatica.com>



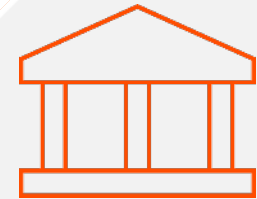
Communities & Support

<https://network.informatica.com>



Documentation

<https://docs.informatica.com>



University

<https://www.informatica.com/in/services-and-training/informatica-university.html>

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Statements made today are based on currently available information, which is subject to change. Such statements should not be relied upon as a representation, warranty or commitment to deliver specific products or functionality in the future.

Agenda

Overview

Key Concepts

Features

Demo

Questions

Overview



Types of Data Used Across Today's Organizations



Financial Data

- Business Units
- Chart of Accounts
- Projects
- Cost Centers
- Legal Entities



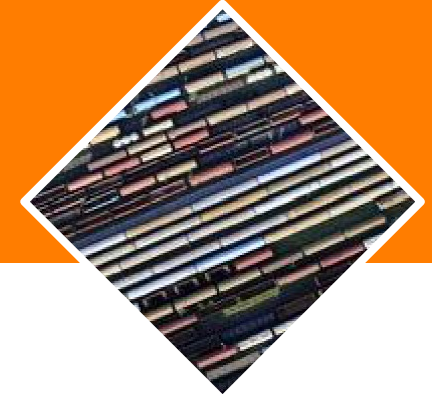
Analytical Data

- Dimension member lists
- Crosswalks
- Intercompany mappings
- Alternate hierarchies



Reference Data

- Billing codes, value sets
- Taxonomies
- Geo codes
- Product classifications



Business Data

- Sales territories, employees
- Companies, organizations & positions
- Parties: customers, vendors
- Locations: wells, assets, stores, distribution centers

What is Reference Data?

Reference data = “coded, semantically stable, relatively static data sets shared by multiple constituencies”
(people, systems, & other master data domains) [MDM Institute]

Status

Classification

Medical

Country

Product Type

Territory

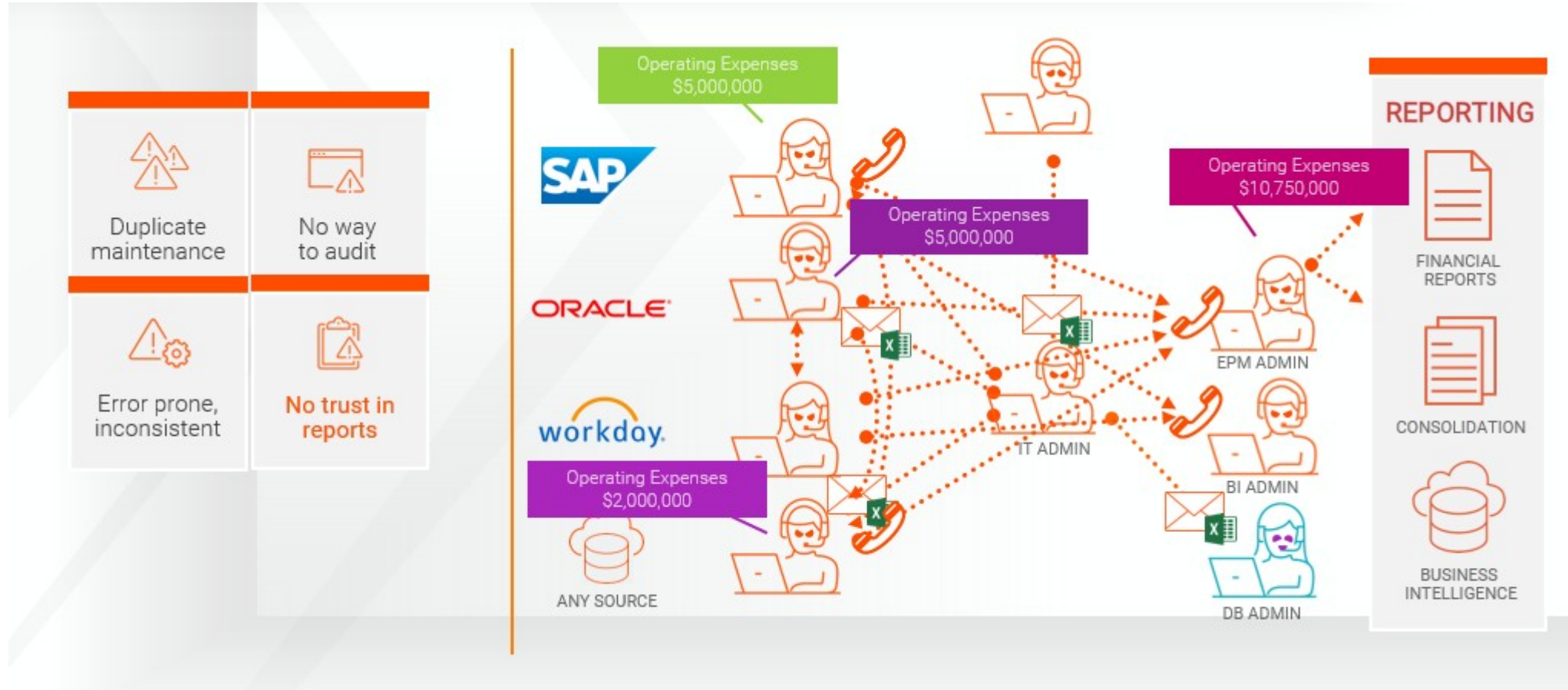
Currency

Location

Chart of Accounts

Financial

Challenges across reference data



Drivers – Why Govern Reference Data?

Data Quality

- Unreliable mastering
- Incomplete/inaccurate data
- Failed transactions
- Incorrect and redundant versions
- Failed data governance

Reporting & Compliance

- External reporting requirements (Risk Reporting with BCBS 239)
- Data Interchange requirements (HL7, EDI)
- External publishing requirements (ICD, EDI)
- Inaccurate financial reporting
- Security and entitlements issues

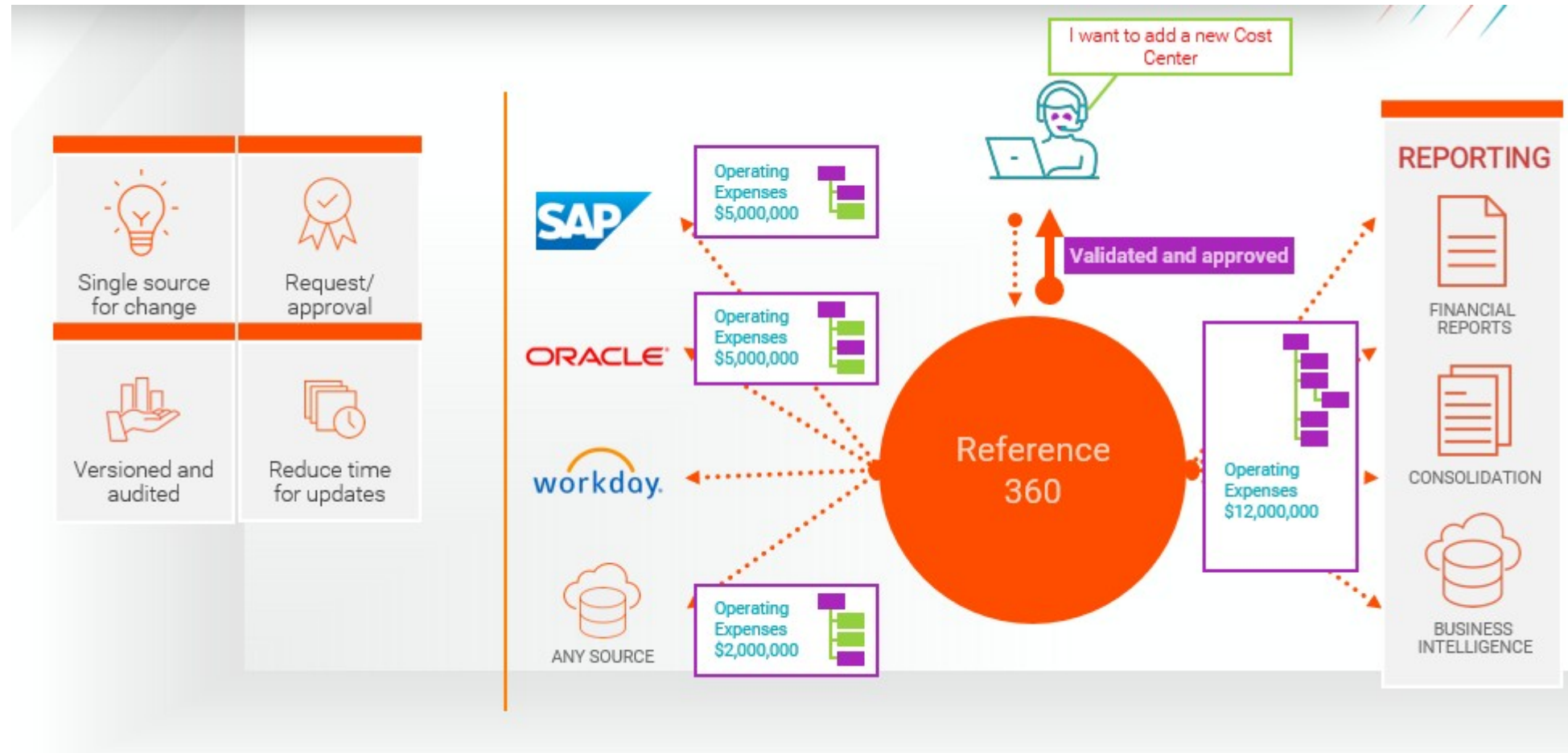
Operational Efficiencies

- Failure in data transformation
- Additional QA effort
- Additional manual effort
- Integration Challenges

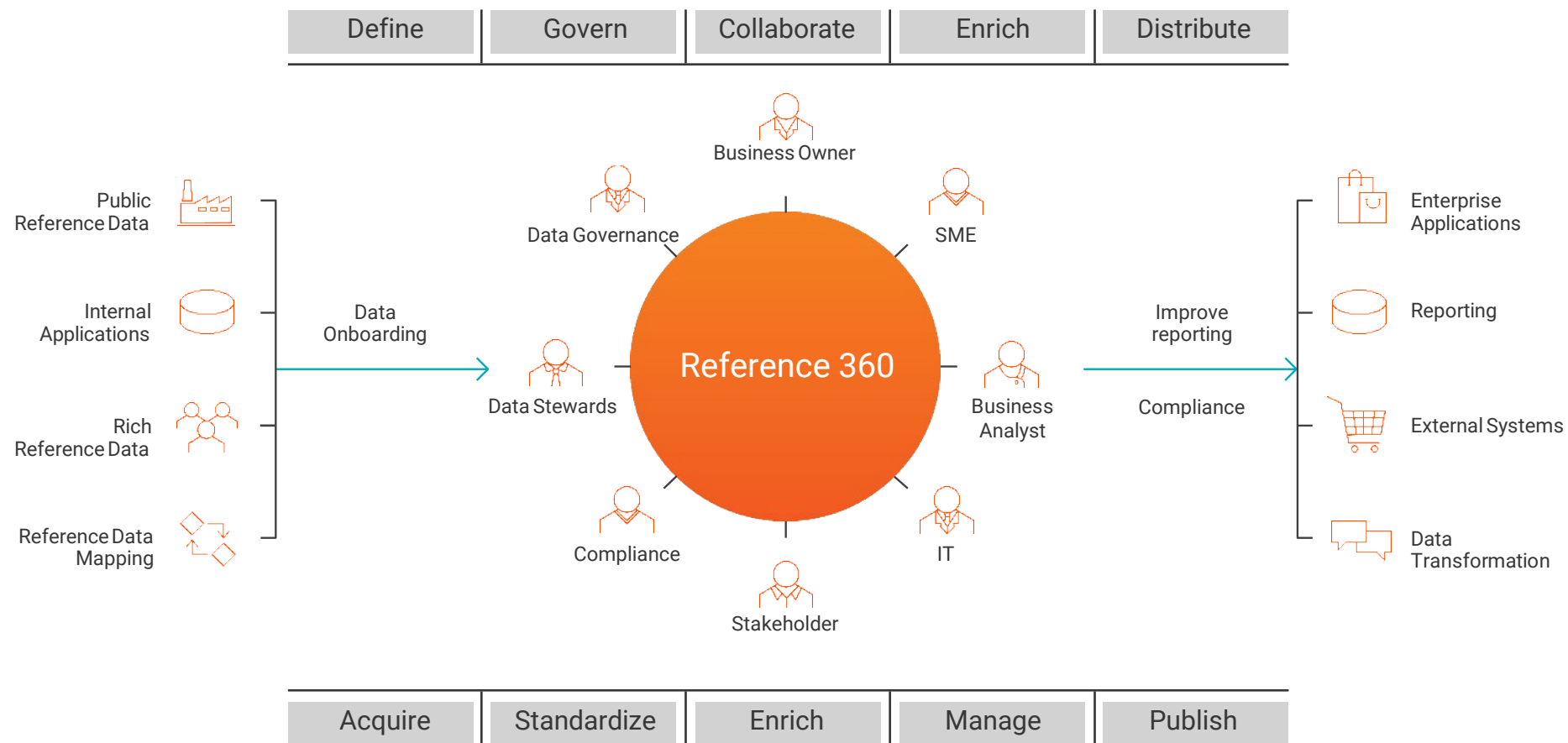
Customer Experience

- Incorrect customer segments
- Unreliable campaign targeting
- Inaccurate financial reports
- Inaccurate sales reporting

Informatica's solution – Reference 360



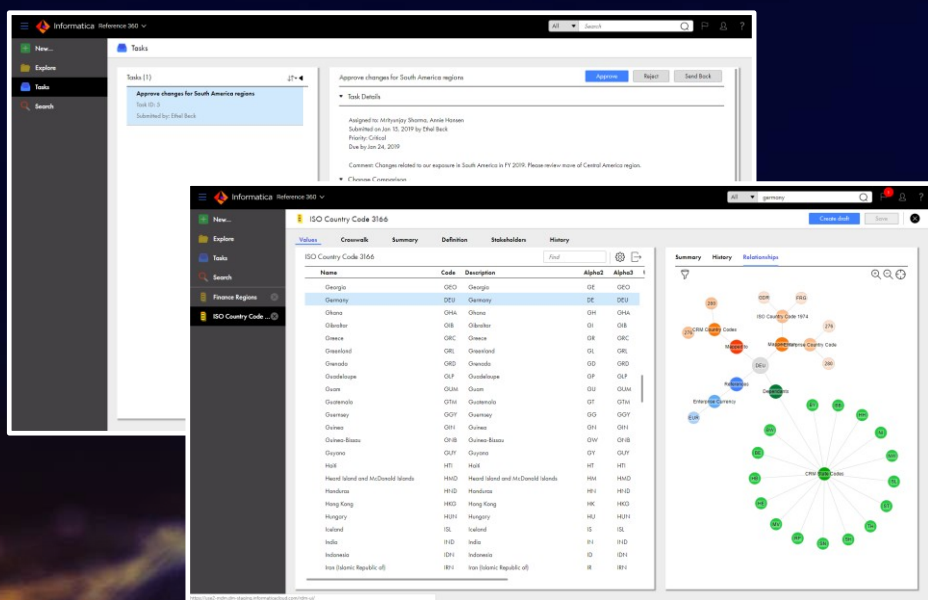
Next Generation of Reference Data Management



One-stop-shop for all things reference data

Reference Data Management with Reference 360

Enable business owners to manage enterprise reference data sets, hierarchies, and cross-walks



Accurate Internal and External Reporting

Improve Employee Productivity

Remove Operational Inefficiencies

Deliver Better Customer Experiences

A strong data foundation is key for successful transformations

Change is constant and unpredictable

Routine Changes



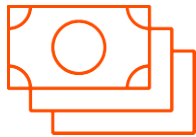
New Geo Region



New Department



New Offering



New Cost Center



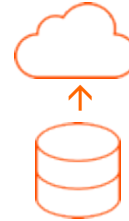
New Legal Entity



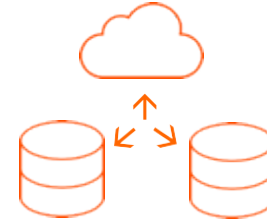
New Project

Business Transformation

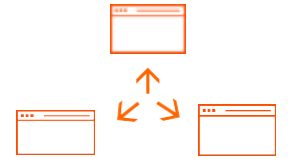
Systems Changes



Migration to Cloud

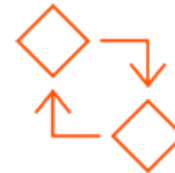


Cloud Coexistence

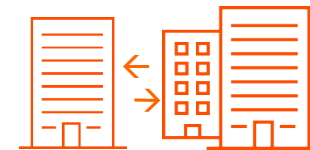


Multi-ERP
Rationalization

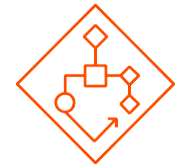
Business & Organizational Changes



Corporate
Reorganizations



Mergers
& Acquisitions



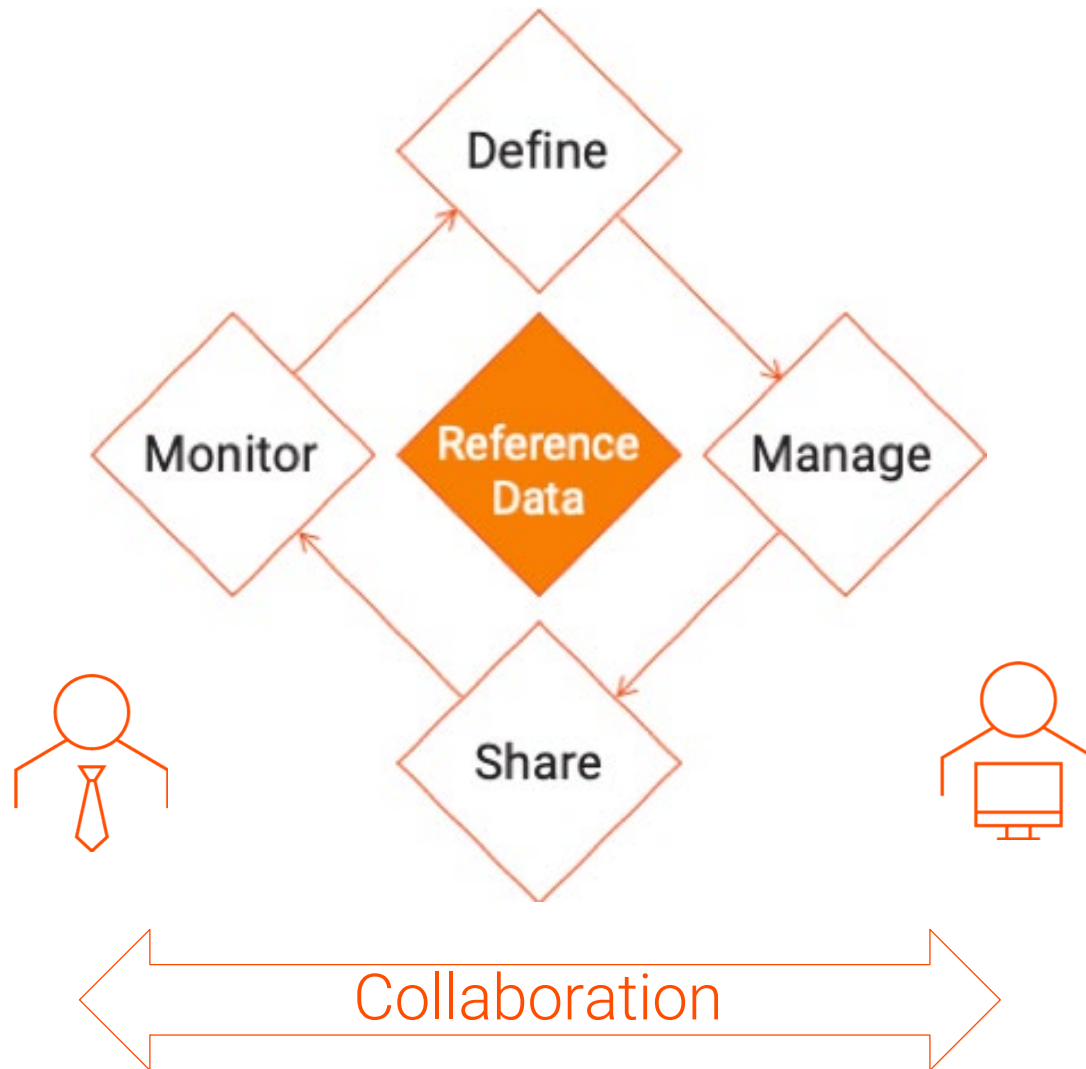
Business Model
Changes

Features



Informatica Reference360 as a Cloud Enterprise Reference Data Hub

Simplifies Reference Data Management across LOBs



Key Features:

- Smart search for reference data
- Easy hierarchy visualization and management
- In place import and export using Excel
- Easy visualization of complex data structure
- Integrated & Configurable workflow
- OOB Side by Side comparison, drafting & versioning
- Includes data integration using IICS & CAI

Benefits:

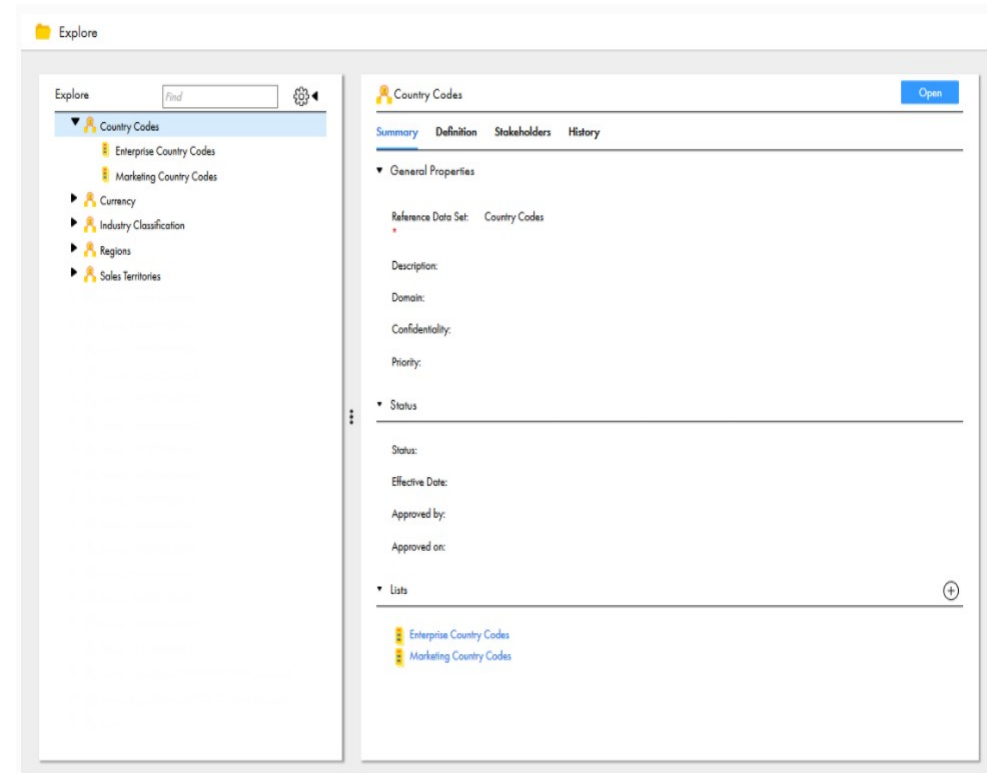
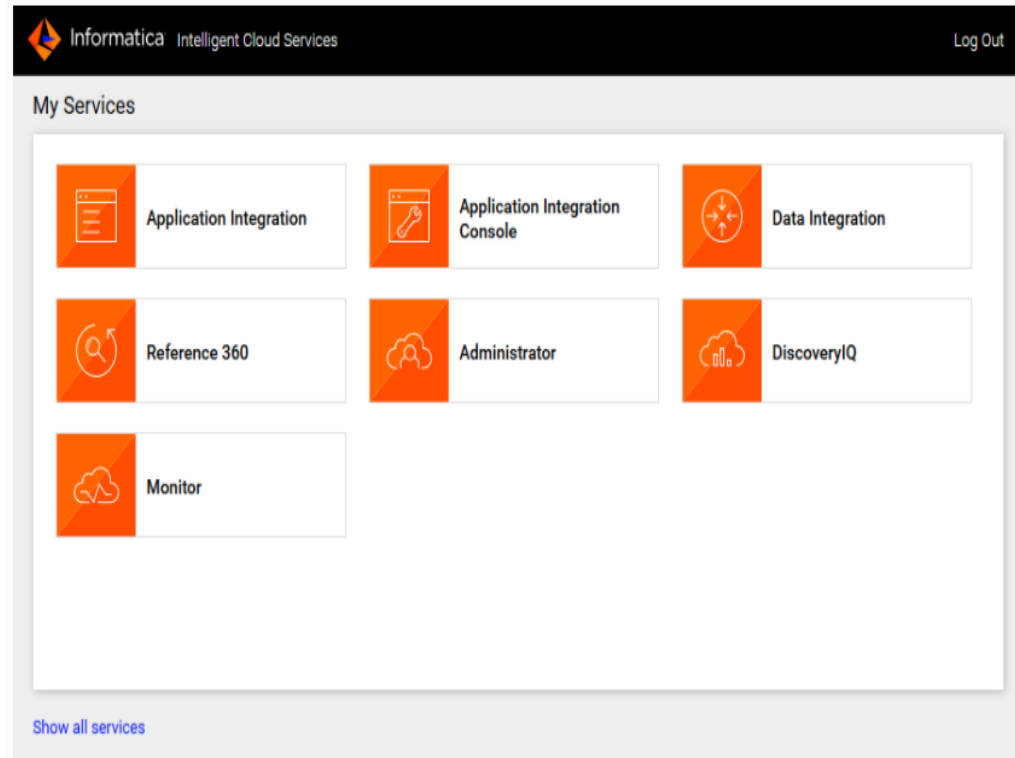
- Purpose-built for reference data
- Accelerate Cloud Deployment
- Business User Friendly Experience
- Enable Self Service Capabilities
- Faster Time to Market
 - Simple UI Configuration
 - Managed Upgrades

SaaS Components – Included Services

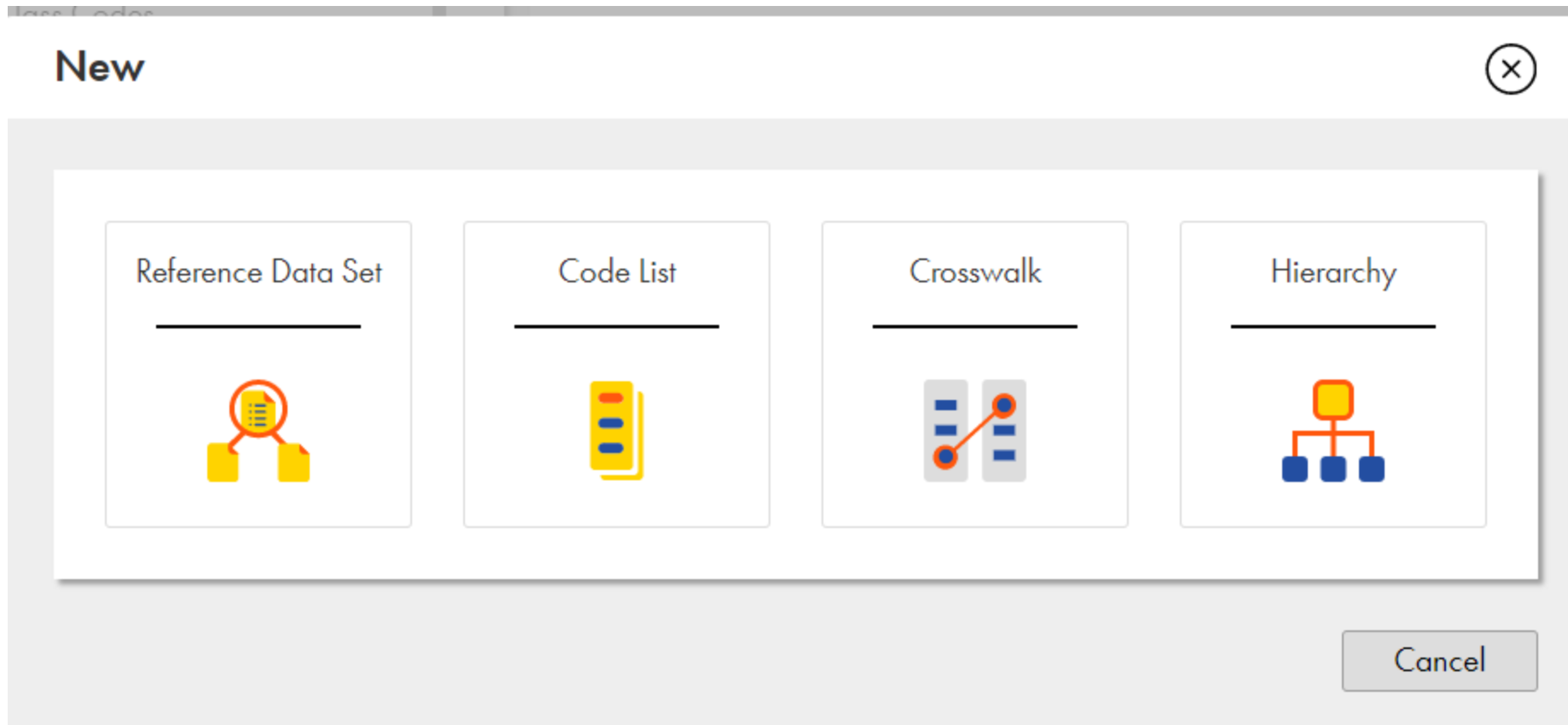
Included are capabilities from the following services that can be used in conjunction with Reference 360:

- Data Synchronization Services – Bi-directional data loading and extraction capabilities as well as advanced scheduling to automate simple and complex multistep integrations between various cloud and your on-premise systems.
- Data Integration Services – Cloud mapping designer. Advanced data integration and data warehousing capabilities and transformations. Task-flow support for Email.
- App Integration Services – Model, develop, test, deploy and simulate services for API & process integrations, embedded HTML applications, and BPEL processes.
- API Gateway Services – API policy enforcement & management functions.
- Data Quality Services – Profile, cleanse, standardize, deduplicate, and enrich all data using an extensive set of prebuilt data quality rules.
- Connectivity– Connectors to popular sources for data and application integration.

Introducing Reference 360



Key Concepts



Reference Data Set

Explore

Find

Account Class Codes

- Allstate
- Allstate Option 2
 - Enterprise Allstate Option 2
- Brand Codes
- Centura
- Chart of Accounts
- Cities
- Country Codes
 - Enterprise Country Codes
 - ISO 3166-1 Alpha 2
 - ISO 3166-1 Alpha 3
 - ISO 3166-1 Numeric
- Currency Codes
- Dell
- Department Codes
- Diagnosis / Diagnostic Codes

Country Codes

Open

Summary Definition Stakeholders History

General Properties

Reference Data Set: * Country Codes

Description:

Domain: Geography

Confidentiality: Internal

Priority: Low

Status

Status:

Effective Date:

Country Codes

Summary Definition Stakeholders History

Attributes (3)

Attribute Name	Type	Required	Reference Data Set	Display Attributes
Name	String	✓		
Code	String	✓		
Description	String			

Country Codes

Summary Definition Stakeholders History

Priority: Low

Status

Status:

Effective Date:

Approved by:

Approved on:

Lists

- Enterprise Country Codes
- ISO 3166-1 Alpha 2
- ISO 3166-1 Alpha 3
- ISO 3166-1 Numeric

Code List

Enterprise Country Codes

Values

Crosswalk

Summary

Definition

Stakeholders















History

Enterprise Country Codes (252)

Name ▼

Code

Description

 Afghanistan	AF	AFG
 Aland Islands	AX	
 Albania	AL	
 Algeria	DZ	
 American Samoa	AS	
 Andorra	AD	
 Angola	AO	
 Anguilla	AI	
 Antarctica	AQ	
 Antigua and Barbuda	AG	
 Argentina	AR	
 Armenia	AM	
 Aruba	AW	
 Australia	AU	

Find

Import Values

1 Download Template

2 Configure Import Settings

Download a template. A template contains a list of fields that you can use to relate. Use the template to create a source file that contains the details of the records that you want to relate.

Download Template

Template Details

Field Name	Data Type	Allow Many
status	NA	N
status.key *	TEXT	N
effectiveDate	DATE	N
approvedById	TEXT	N
approvedByName	TEXT	N
approvedOn	DATE	N
appType *	TEXT	N

< Back

Next >

Finish

Cancel

New Code Value

Name: *

Test

Code: *

Cancel

Enterprise Country Codes

Publish Draft

Discard Draft

Save

Compare with Published Version

View Published Version

Crosswalk

Enterprise Country Codes

Draft

Send for Approval

Publish Draft

Discard Draft

Save

Compare with Published Version

View Published Version

Values

Crosswalk

Summary

Definition

Stakeholders

History

Value Mappings

Open Crosswalk

Find

Enterprise Country Codes ▼	ISO 3166-1 Alpha 2	ISO 3166-1 Alpha 3	ISO 3166-1 Numeric
Afghanistan	AF Afghanistan	AFG Afghanistan	4 Afghanistan
Åland Islands	AX Åland Islands	ALA Åland Islands	
Albania	AL Albania	ALB Albania	
Algeria	DZ Algeria	DZA Algeria	
American Samoa	AS American Samoa	ABW Aruba, ASM American Samoa	
Andorra	AD Andorra	AND Andorra	
Angola	AO Angola	AGO Angola	
Anguilla	AI Anguilla	ALA Anguilla	
Antarctica	AQ Antarctica	ATA Antarctica	
Antigua and Barbuda	AG Antigua and Barbuda	ATG Antigua and Barbuda	
Argentina	AR Argentina	ARG Argentina	
Armenia	AM Armenia	ARM Armenia	
Aruba	AW Aruba	ABW Aruba	

Enterprise Country Codes to ISO 3166-1 Alpha 2

Save

Remove

Summary

Stakeholders

Value Mappings

History

Mappings

Find

Enterprise Country Codes ▼	ISO 3166-1 Alpha 2
Afghanistan	AF Afghanistan
Åland Islands	AX Åland Islands
Albania	AL Albania
Algeria	DZ Algeria
American Samoa	AS American Samoa
Andorra	AD Andorra
Angola	AO Angola
Anguilla	AI Anguilla
Antarctica	AQ Antarctica
Antigua and Barbuda	AG Antigua and Barbuda
Argentina	AR Argentina
Armenia	AM Armenia
Aruba	AW Aruba
Australia	AU Australia

Target Code List

Find

ISO 3166-1 Alpha 2 ▼

- AD Andorra
- AE United Arab Emirates
- AF Afghanistan
- AG Antigua and Barbuda
- AI Anguilla
- AL Albania
- AM Armenia
- AO Angola
- AQ Antarctica
- AR Argentina
- AS American Samoa
- AT Austria
- AU Australia
- AW Aruba

Hierarchy

The screenshot shows the Informatica Hierarchy Designer interface. The top navigation bar includes the Informatica logo, a search bar, and user profile icons. The left sidebar contains navigation options: New..., Explore, Tasks, Imports, Search, and a highlighted 'Locations' section. The main workspace is titled 'Locations' and has tabs for Hierarchy, Summary, Definition (selected), Stakeholders, and History. The 'Definition' tab shows a 'Hierarchy Designer' area with a blue box labeled 'Enterprise Regions (Regions)'. A teal callout box says 'Select a code list as the top-level node.' To the right, the 'Properties' panel shows 'Top Level Node:' with a dropdown menu set to 'Enterprise Regions (Regions)'.

The screenshot shows the Informatica Explore interface. The left sidebar lists various code lists: Gender, Health Care, Industry Classification, Industry Codes, Line of business, Locations (expanded), Enterprise Regions, Enterprise Country Codes, Location types, Media type, Onboarding status, Product Classification, Product groups, Product standards, Product status, Product Type, Professional Designation, Profit Centers, and Regions. The main area displays a hierarchy diagram with a blue box labeled 'Regions (Enterprise Regions)' pointing down to a blue box labeled 'Country Codes (Enterprise Country Codes)'. The right sidebar has tabs for Hierarchy, Summary, Definition (selected), Stakeholders, and History. The 'Definition' tab shows a 'Hierarchy Designer' area with the same diagram. The 'Properties' panel on the right shows 'Top Level Node: Regions (Enterprise Regions)' and 'Child Relationships: Regions (Enterprise Regions) to Country Codes (Enterprise Country Codes)'.

Workflows

Compare Versions

☒ Show only changes

☒ Moved (1) ☒ Deleted (1) ☒ Edited (1) ☒ Added (1)

Previous Next - / 5

Active			Draft		
Name	Code	Description	Name	Code	Description
▼ Agriculture, Forestry, Fishing and Hunting	11		▼ Agriculture, Forestry, Fishing and Hunting	11	
Oilseed and Grain Farming	1111		Oilseed and Grain Farming	1111	
			Educational Services	61	
▼ Mining	21		▼ Mining	21	
Bituminous Coal and Lignite Surface Mining	212111				
▼ Coal Mining	2121		▼ Coal Mining	2121	
Bituminous Coal and Lignite Surface Mining	212111		Bituminous Coal and Lignite Surface Mining	212111	
▼ Utilities	22		▼ Utilities	22	

OK

Send for Approval

Task Details

Task Title: Approve Code List - 'NAICS'

Priority: High

Due Date: 11/13/2020

Assign to: Integration Test Business Steward

Comment: please approve proposed changes

Compare Versions

☒ Show only changes

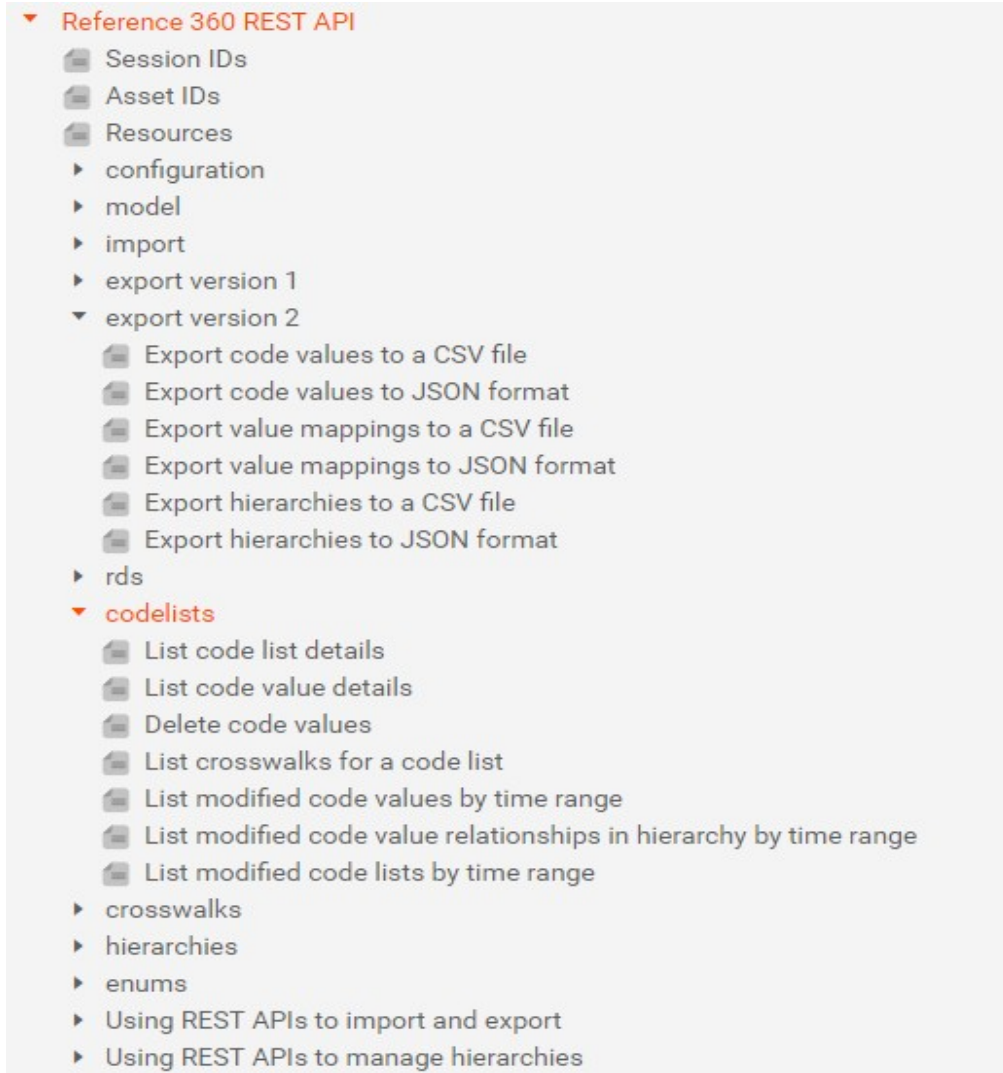
☒ Moved (1) ☒ Deleted (1) ☒ Edited (1) ☒ Added (1)

Previous Next - / 5

Active			Draft		
Name	Code	Description	Name	Code	Description
▼ Agriculture, Forestry, Fishing and Hunting	11		▼ Agriculture, Forestry, Fishing and Hunting	11	

Send for Approval Cancel

MDM Reference 360 Integration



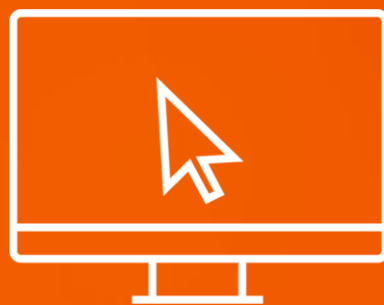
1. Import Data in Reference 360:

Load reference data and cross walk into the Reference 360.

a) Using R360 Business friendly UI (or)

b) Using OOTB Rest API

2. Export data from Reference 360 using API



Demo

Questions?



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Thank You!
