

# IDMC Associate Bootcamp Intro

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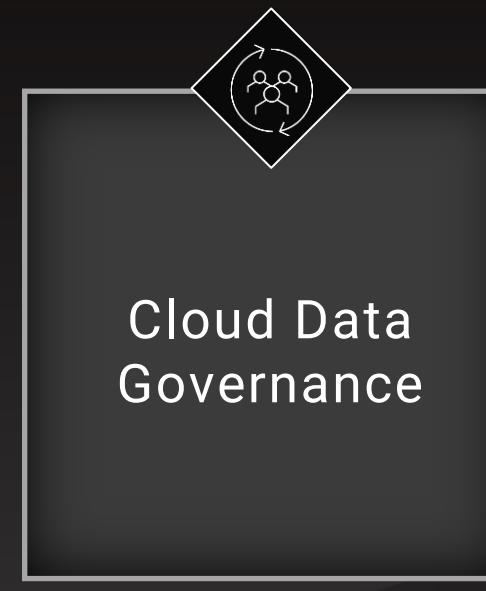
Global Partner Technical Sales · GPTS

2023

# Where data comes to life



# Recap - DAY 2



# Agenda - DAY 3

DAY 2  
Recap

MDM & 360  
Applications

What's New in  
IDMC

What's Next?

# MDM & 360 Applications

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2023

# Where data comes to life



# Back to Basics

Where data comes to



# What is Master Data Management

A technology-enabled discipline in which business and IT work together to ensure the **uniformity, accuracy, stewardship, semantic consistency** and **accountability** of the enterprise's official shared master data assets.

Source: [Gartner Glossary](#)

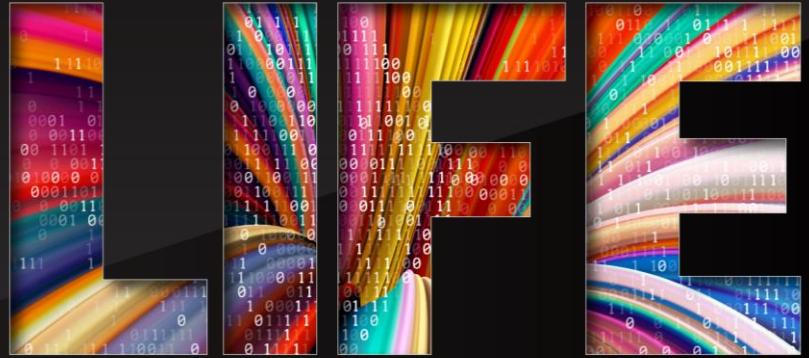
# What is master data, what is not master data

	Master Data	Non-Master Data
Customer	Title Name Date of Birth Address Email Phone Identification Number	Transactions Social Media (likes/shares) Product Reviews Interactions Chat history
Product	Product identifiers (SKU, GTIN) Weight Dimensions Colors Material/Ingredients	Price Inventory/Stock Lead Time Orders Sales/Profitability Returns

Master data is the consistent and uniform set of identifiers and extended attributes that describes the core entities of the enterprise including customers, prospects, citizens, suppliers, sites, hierarchies and chart of accounts.

# Use Cases for MDM

Where data comes to



 Macroeconomic  
conditions

 Inflation  
pressures

 Changing  
purchasing patterns

 Supply chain  
challenges

## Deliver CX That Matters & Drive Profitable Growth

Cost  
Reduction

Productivity  
Improvement

Risk  
Mitigation

# Use Cases

HORIZONTAL							VERTICAL
							
Cloud-Only IT	Office of the CDO	LoB	Life Sciences	Healthcare	Financial Services & Insurance	Retail	
<p>Deliver trusted data for analytics and AI</p> <p>Automate and orchestrate workflows</p> <p>Gain a single view of the business</p> <p>Modernize to a multi-cloud / hybrid data stack</p>	<p>Provide self-service access to trusted data</p> <p>Align data strategy with business priorities</p> <p>Empower data consumers with relevant data</p> <p>Enforce governance policies and standards</p>	<p>Increase ROI with smarter customer analytics</p> <p>Optimize omni-channel commerce</p> <p>Gain a single view of the customer</p> <p>Modernize business processes and applications</p>	<p>Decentralized clinical trials</p> <p>Identification of medicinal products (IDMP)</p> <p>Digital engagement</p> <p>Real-world data</p>	<p>Digital front door</p> <p>Claims and payments portal</p> <p>Patient 360</p> <p>Health plans and providers interoperability</p> <p>Member 360</p>	<p>Client onboarding</p> <p>Omni-channel banking</p> <p>Single view of customer</p> <p>Regulatory compliance</p> <p>Broker analytics</p> <p>Claims modernization</p>	<p>Client onboarding</p> <p>Omni-channel banking</p> <p>Brand loyalty</p> <p>Targeted promotions</p>	

Where data comes to



# MDM SaaS Capabilities

Viewed from a Use Case Perspective

# Use Case for Financial Services

## Know Your Customer (KYC)



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With Customer 360

# Setting up a new Source

1. Add a new Source to MDM
2. Make any relevant changes to Data Model
3. Connect to drop downs to Reference 360
4. Configure Trust and Survivorship

# Model Master & Reference Data

Deploy a new domain  
in weeks not months

- Model any domain of your choice using simple, intuitive model configuration screen
- Modeling is based on logical business entities
- Extend model with custom business entities, attributes and relationships
- Smart Fields: context aware data types
- Reference 360 capabilities are included for all domains for their reference data management needs - code list management & cross walks
- Underlying model is a document data store – very easy to extend, can be extended without locking database objects

The screenshot displays three main components of the Informatica Model Master & Reference Data interface:

- Model Configuration Panel:** Shows a grid of fields for a "Location" entity. The columns are labeled "Basic Fields", "Data Quality", "Match", "Survivorship", and "Events". The "Address" field is highlighted with a yellow border.
- Properties Panel:** A modal window titled "Properties: Address" containing settings for the "Address" field. It includes sections for "General" (Status: Enabled), "Data Quality", "Survivorship", and "Description". The "Description" section notes that it defines all fields in a standardized global address.
- New Asset Dialog:** A modal window titled "New Asset" for creating a new asset category. It lists categories: "Model", "Source Systems", "Business Applications", and "Jobs". Under "Model", four options are shown: "Business Entity" (selected), "Reference Data", "Hierarchy", and "Relationship". Each option has a brief description below it.



# Setting up Hierarchies and Relationships



1. Show how Hierarchies and Relationships can be set up

# Hierarchies & Graph Relationships

## Efficiently structure relationships for analytical and operational use cases

- Quickly define hierarchical structures using a visual designer
- Optionally, trigger approval process for changes in a hierarchy – reviewer can then compare the active and pending version of a hierarchy to contrast proposed changes
- View hierarchies at historical points in time to determine changes over time
- Visualize and explore knowledge graph of relationships between entities, within a domain and between multiple domains

The screenshot displays the Informatica Multidomain MDM application interface. At the top, there's a navigation bar with links for New, Home, Search, File Import, Workflow Inbox, Hierarchies, My Jobs, and Reports. The main title is "Eco Autoworks" with the address "805 South Carolina | Florence | 29505 | USA" and the tagline "Organic and Sustainable .NET 45 DAYS". Below the title, there are tabs for Supplier Profile, Supplier Risk, Source Records, History & Lineage, Related Records, Hierarchies, 360° View, Finance Detail, and Misc. A search bar and a "Supplier" dropdown are also present.

The central area features a "Relationship Graph" visualization showing a network of entities connected by lines. To the right of the graph is a table titled "Eco Autoworks" listing various records and their relationships:

Record	Relationship
Bob Kirk	Contact
Patrick Williams	Contact
Trident Autoworks	Organization to Organization
Microtech Semi Conductor	B2B Org Agreement: Service
United Foundries	B2B Org Agreement: Service
Cyber Cars	B2BOrg has Product
Eco Autocars Canada	Supplier is Customer
Maria Garcia	Account Manager

Below the graph, there's a "Hierarchy Designer" section with a diagram titled "Organization Chart Model" showing the structure from "Organization Chart Entity" down to "Person".

At the bottom, there's a separate "Ironman Triathlon" section with a "Point in Time" dropdown set to "Current". It lists various Ironman events:

- Ironman Belek Turkey
- Ironman Cascais Portugal
- Ironman Cascais Portugal
- Ironman Costa Navarino Greece
- Ironman Mandela Bay Portugal
- Ironman Monterrey Mexico
- Ironman Oceanside California
- Ironman Panama city beach Florida
- Ironman Sacramento California
- Ironman Sahl Hasheesh Egypt
- Ironman Sardinia Italy
- Ironman Tiberias Israel
- Ironman Waco Texas
- Ironman Waco Texas
- Ironman Wilmington North Carolina

A table below shows the relationship details for these events:

Record	Relationship	Scheduled Date	Status
Ironman Belek Turkey	Organization to Race	11/19/2021	Active
Ironman Panama city beach Florida	Organization to Race	11/19/2021	Planned
Ironman Monterrey Mexico	Organization to Race	11/19/2021	Planned
Ironman Tiberias Israel	Organization to Race	11/20/2021	Planned
Ironman Sahl Hasheesh Egypt	Organization to Race	11/20/2021	Planned
Ironman Mandela Bay Portugal	Organization to Race	11/20/2021	Planned
Ironman Cascais Portugal	Organization to Race	11/16/2021	Completed
Ironman Waco Texas	Organization to Race	11/16/2021	Completed
Ironman Cascais Portugal	Organization to Race	11/17/2021	Completed

# Configuring Data Quality Rules

1. Check data quality rule for date of birth

# Data Quality & Enrichment

Efficiently scale data quality across all master data sources

- Define DQ rules centrally, at MDM model level, and MDM automatically applies them for all sources and all integration modes
- Single click activation for Informatica DaaS Phone, Address and Email verification services
- Easily link custom SaaS service calls to use 3rd party services for validation & enrichment
- Prebuilt data quality content available to accelerate implementation
- Trust scores for survivorship for individual field on individual record can be automatically downgraded based on results of DQ validation rule

The screenshot displays two main sections of the Informatica Data Quality interface.

**Top Section:** A table listing Data Quality rules. The columns are: Rule Association Name, Status, Description, and Applied Field. The table includes rows for various validation rules like 'DUNSSNValidation\_AlternateIdentifier', 'infac360ls\_ra\_hcp\_npi\_check\_alt\_id\_value', etc., covering fields such as Identifier, Alternate Identifier Value, Full Name, Specialty, Taxonomy Code, and Phone.

Rule Association Name	Status	Description	Applied Field
DUNSSNValidation_AlternateIdentifier	Enabled	Validate if DUNS/SSN has a valid format	Identifier.Alternate Identifier Value
infac360ls_ra_hcp_npi_check_alt_id_value	Enabled		Identifier.Alternate Identifier Value
infac360ls_ra_hcp_concat_full_Name	Enabled		Full Name
infac360_ra_taxonomyReturnsSpecialty	Enabled		Specialty.Taxonomy Code
infac360_ra_taxonomyReturnsSubSpecialty	Enabled		Specialty.Taxonomy Code
infac360_ra_tc	Valid		Taxonomy Code
infac360_ra_tc	Valid		Taxonomy Code
infac360ls_ra_tc	Valid		Taxonomy Code

**Bottom Section:** A detailed view of a Data Quality rule for the 'Phone' field. The 'Properties' panel shows the 'DaaS' tab selected, with the 'Enable DaaS Validation' checkbox checked. Other settings include 'Real-time' validation type, 'Information' error severity, and an error message 'Invalid Phone Number'. The 'Phone' field is highlighted with an orange box in the 'All Attributes' grid.

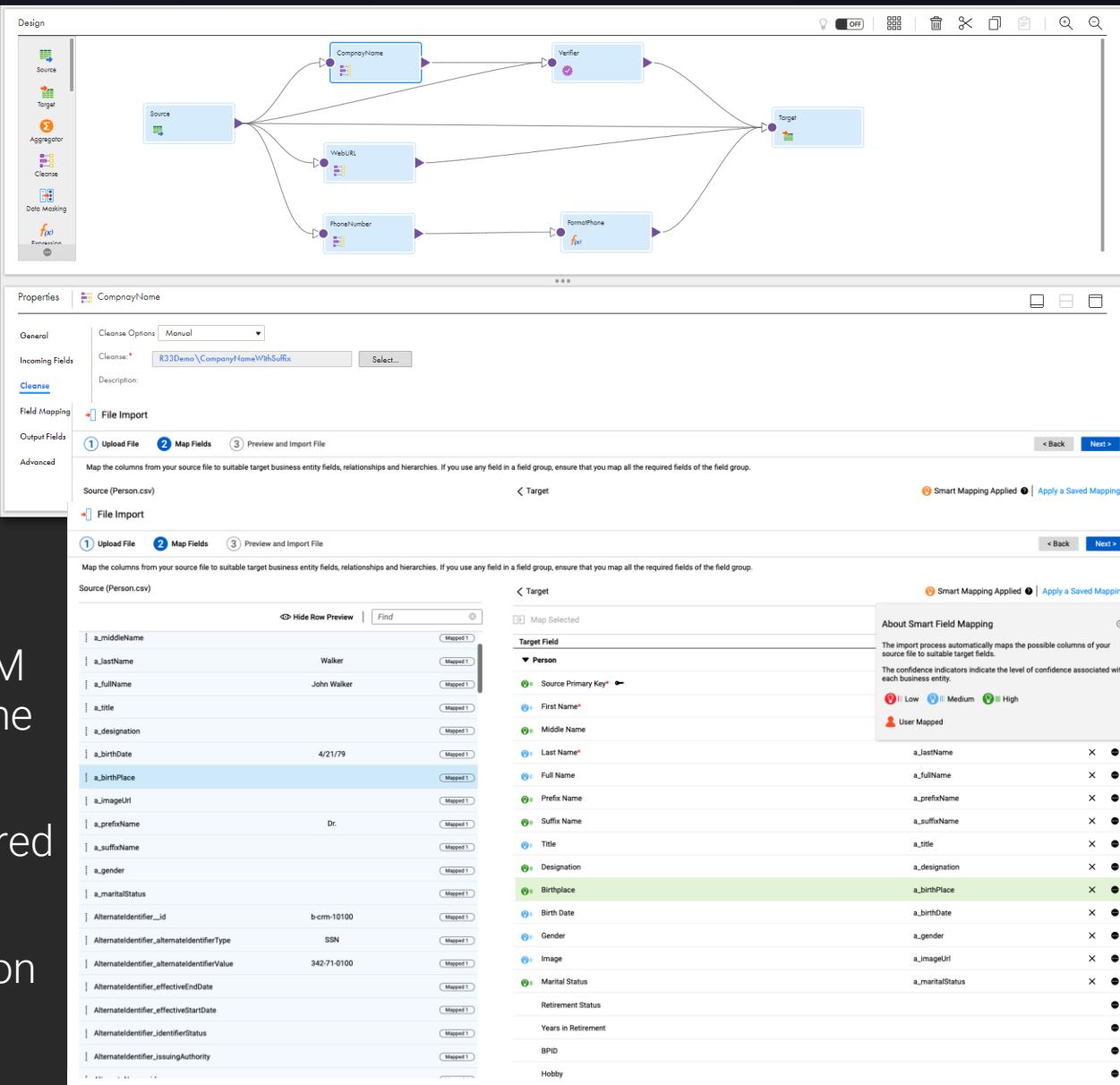
# Data Ingress

1. View Mapping, Mapping Task and Taskflow for Data Ingress
2. View Process Orchestration for automation
3. Ingress batch file via 360 Application UX
4. Manual data input via 360 Application UX

# Data & Application Integration

50% productivity increase  
in onboarding master data

- CDI and CAI for MDM purposes are included in subscription
- Data Integration Service connects MDM to over 150 systems
- RESTful APIs for real-time integration from other systems
- Business 360 connector for mapping to and from MDM in CDI + fast non-hierarchical connector for high volume loading
- Machine learning-based file import with CLAIRE-powered auto-mapping of file columns to MDM model
- Ability to orchestrate data flows using Cloud Application Integration



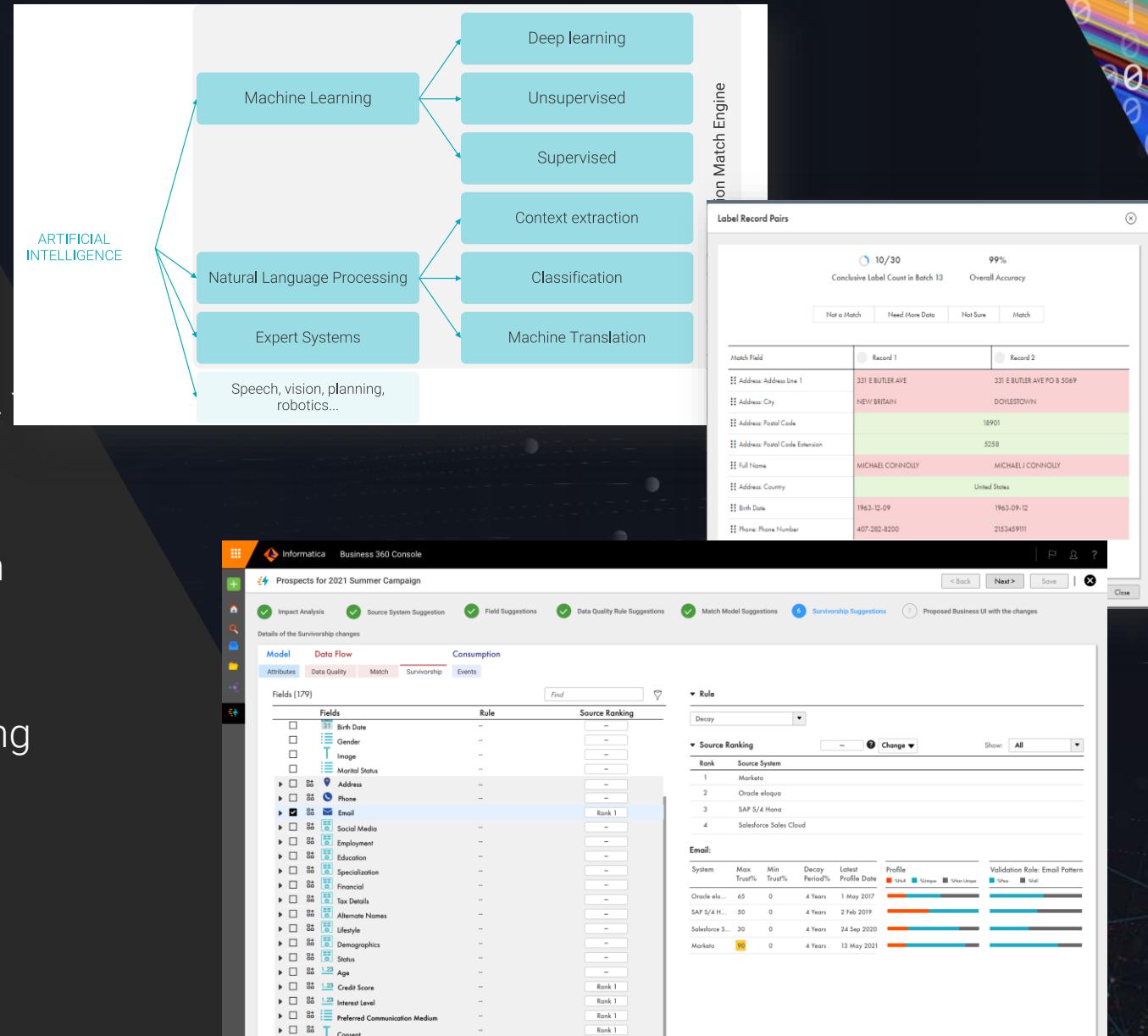
# Configuring Matching Rules

1. Configure a new match rule set
2. Train the Machine Learning Model

# Match & Merge Records

Train AI match algorithms in hours instead of days manually tuning rules

- High accuracy AI matching, with supervised ML infer rules and ability to integrate Informatica NAME3 rules engine:
  - Better results and faster configuration than both rules-based match engines and AI-based match engines
- Active learning with Random Forests for blocking & matching rules
- Resolve duplicates using auto merge rules, manual merge rules & threshold- based rules
- Patented Trust Framework for cell-level survivorship, taking age of data, source of data and quality of data into account



# Defining Events

1. Define a new event
2. Look into custom workflows

# Task Management & Workflow

## Simplify collaboration and orchestration of processes

- Full Business Process Management engine under the hood, able to execute BPEL processes for orchestration and human tasks
- Business Events configuration to easily associate MDM data events with human-in-the middle approval processes
- Multi-step approval workflows with customizable reviewer, approver and notification list
- Task Inbox for reviewing and taking action on tasks in a process
- App Composer makes it easy to create rich custom page layouts for different user roles, and to lay out pages for stewarding data in business entities

Approve changes for South America regions

Approved by: Miritynjay Sharma, Annie Hansen  
Submitted on Jan 15, 2019 by Ethel Beck  
Priority: Critical  
Due by Jan 24, 2019

Comment: Changes related to our exposure in South America in FY 2019. Please review move of Central America region.

Hierarchy\_update

Event Workflow Tasks Workflow Properties

Define the properties for tasks in the workflow.

Workflow Template

Title: \* Clinic assignment approval for: {\$anchor}

Description: \* Assign a new patient {\$anchorLabel}

Priority: \* Normal

Due In: \* 7

Changelist ID  
Business Event GUID  
Business Event Name  
Record GUID  
Business Entity Type  
Record Name

Configuration Workflow

Quick Filters | Open Tasks (1)

Task ID	Title	Task	Priority	Status
572129497034313728	Prospects for 2021 Summer Campaign	New Data Source	Medium	Unassigned
547836746716420273...	CRM Customers	Final Review	High	In Progress
543712384750280272...	NSE Customer	Final Review	Medium	In Progress
538475024250280884...	Warrant Claims Source	Final Review	Medium	In Progress

Prospects for 2021 Summer Campaign

Task: Prospects for 2021 Summer Campaign  
Status: Unassigned  
Priority: Medium

Assigned To: New Data Source  
Assigned To: Robert Will  
Modified By: Robert Will

Created On: May 13  
Modified On: May 13

Description

Task "Prospects for 2021 Summer Campaign" is assigned from Data Governance and Catalog by Alex

# Completing Tasks

1. Check workflow tasks
2. Create a new record
3. Verify record history

# Stewardship & Governance

Increase productivity and scale of issue identification and remediation

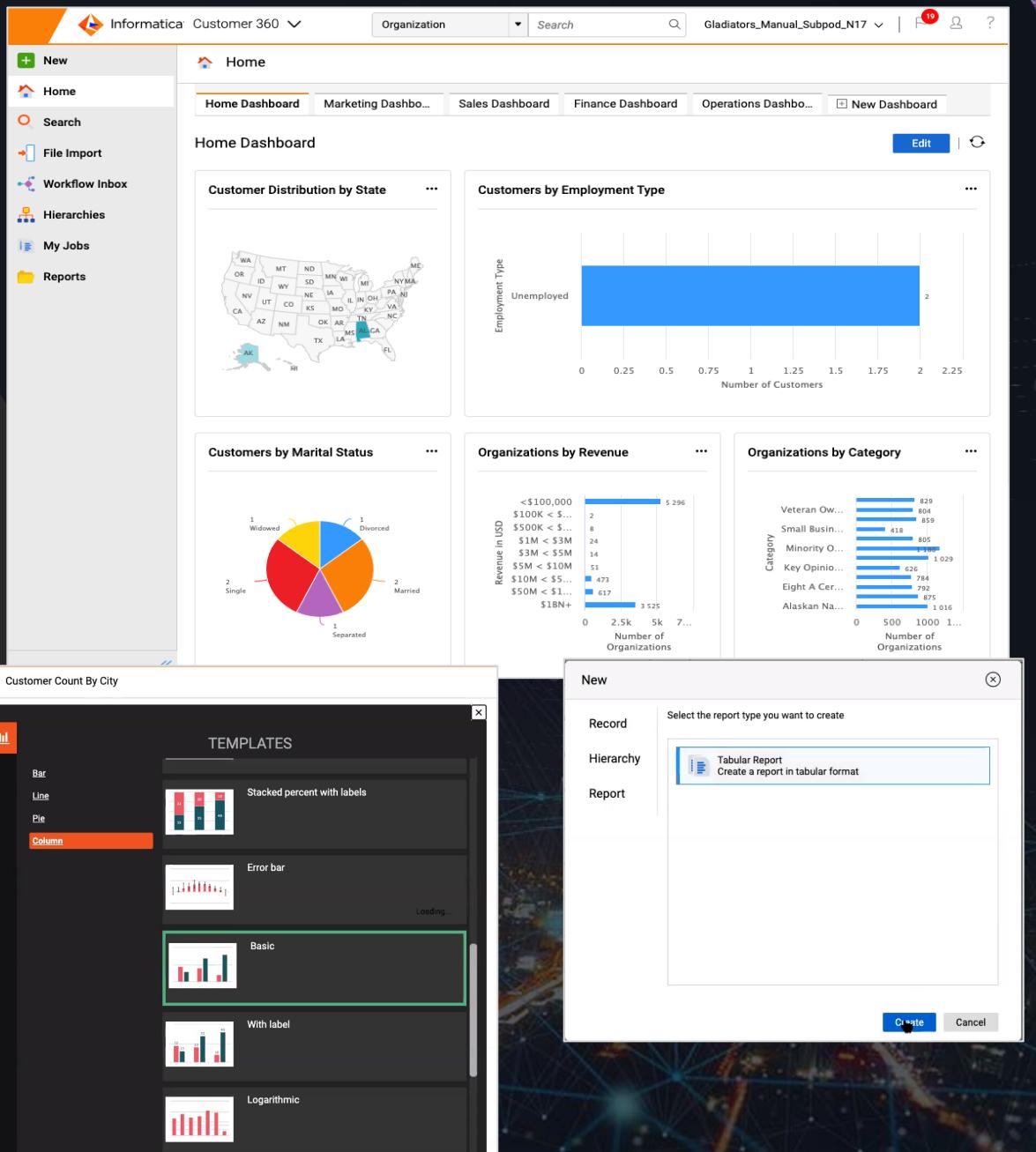
- Use App Composer to customize search results and to provide rich page layouts, to provide the views stewards need to best manage their data
- Reduce duplication during record creation with CLAIRE's automatic Similar Records recommendations
- Understand record-level data lineage with the Cross Reference view and dive into audit trail of changes to records with the History view
- See visual indicators of correctness and completeness for Addresses, Phone Numbers and Emails when used with Informatica DaaS Verification services

The screenshot displays the Informatica Customer 360 interface. On the left, a sidebar includes links for New, Home, Search, File Import, Workflow Inbox, Hierarchies, and My Jobs. The main area shows a record for "Tony Howard Stark" with a profile picture and contact information. Below the profile are sections for Address, Office, Home, Phone, Email, and Social Media. To the right, there is a chart titled "Purchases by Product Category" and a donut chart titled "Lifestyle Indicator". A section titled "CLAIRES™ Similar Records" lists recommendations for "Inforamica Inc" and "Inforamica Canada". At the bottom, a "History" section shows a list of recent updates with details like "Updated in Address > End Date, Address > Address Line 1 and... September 17, 2021 at 1:50 PM Updated By amalthan\_1".

# Dashboards & Reporting

Enable data stewards with self-service access to master data

- Guided process for business users and data stewards to
  - Create custom reports on mastered business entities - in aggregate or at the individual record level
  - Build and customize their own dashboards with preferred content and charts
  - Display summary data in custom charts on dashboards or in individual records
  - Schedule report execution



# Security & Privacy

Increase productivity and scale of data protection and access control

- Comprehensive cloud security program, and adherence to the most stringent cloud security standards.
- Data is securely encrypted: encryption in motion uses TLS v1.2 or greater, and encryption at rest uses AES-256
- Role based access control for MDM assets determines what privileges a user has on what secured resources
- Attribute based access control provides record and field level access control

Name	Create	Read	Update	Delete
First Name*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Middle Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Name*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Full Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Prefix Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Suffix Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Title	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Designation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Birthplace	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Birth Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Image	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



# System Development Life Cycle & Operations

## Simplify configuration, deployment, and administration

- Automate how changes, assets and configurations are moved from one org to another
- All-in-one SDLC for the entire system, including data integration mappings, data quality rules, application integration processes, and MDM configuration assets
- Central administration to manage users, roles, user groups and SAML setup, secure agents, licenses, and metering info
- My Jobs portal to configure, run and monitor jobs, scheduled or on demand. Also, view and download results, errors, match pairs and records with data quality issues

The screenshot displays two main windows of the Informatica Business 360 interface.

**Top Window: Export Assets**

This window shows a list of selected assets for export. The assets include:

Name	Type	Location	Description
Person Summary	Component	Customer360	Person summary view
Organization Summary	Component	Customer360	Organization summary view
Person_Create_Page_OOTB	Page	Customer360	Person record details create
Organization_Create_Page_OOTB	Page	Customer360	Organization record details create
Organization Page	Page	Customer360	Organization record details view
Person Page	Page	Customer360	Person record details view
New PersonPage	Page	Customer360	New PersonPage
Customer 360	Business Application	Customer360	Customer 360
Person	Business Entity	Customer360	Person
Hospitals	Business Entity	Customer360	Hospitals
Generate Merge Tasks	Job Definition	Customer360	Generate Merge Tasks
Find Lost Records : Organization	Job Definition	Customer360	Find Lost Records : Organization
Find Lost Records : Person	Job Definition	Customer360	Find Lost Records : Person
Informatica Customer 360	Source System	Customer360	Informatica Customer 360

**Bottom Window: My Jobs**

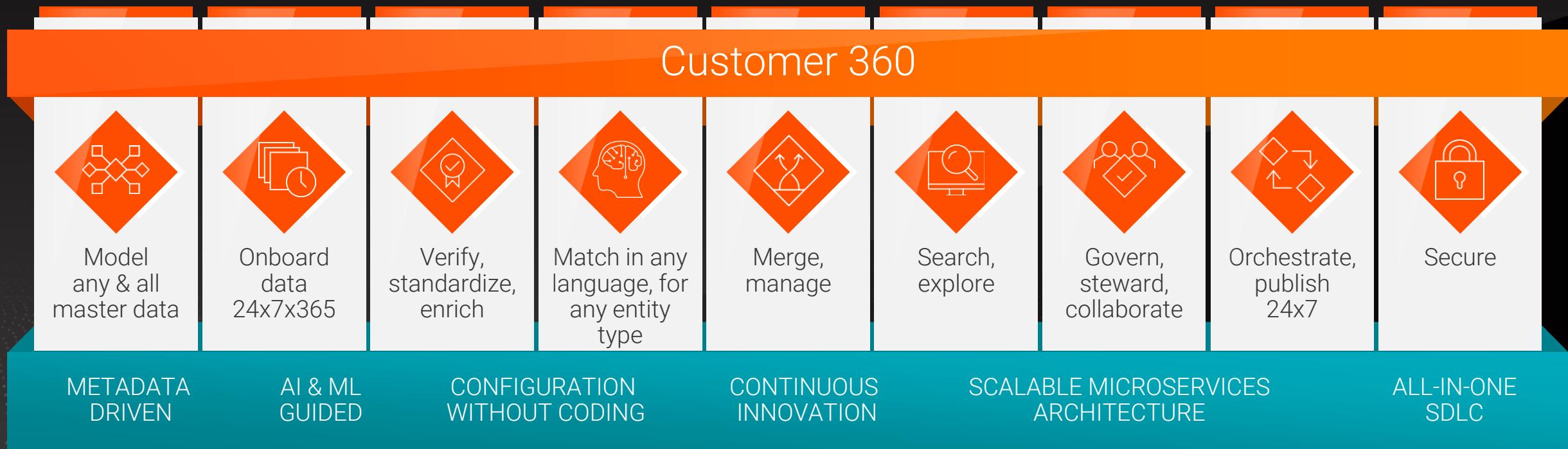
This window shows the results of a job named "NewMatchJob". The job ran successfully from July 27, 2021, at 1:19:16 PM to 1:22:26 PM, with a duration of 00 hours 03 mins 10 secs. The "Match" tab is selected, displaying the following process flow diagram:

```
graph LR; Start((Start)) --> Match[Match]; Match --> Merge[Merge]; Merge --> Search[Search In...]; Search --> End((End))
```

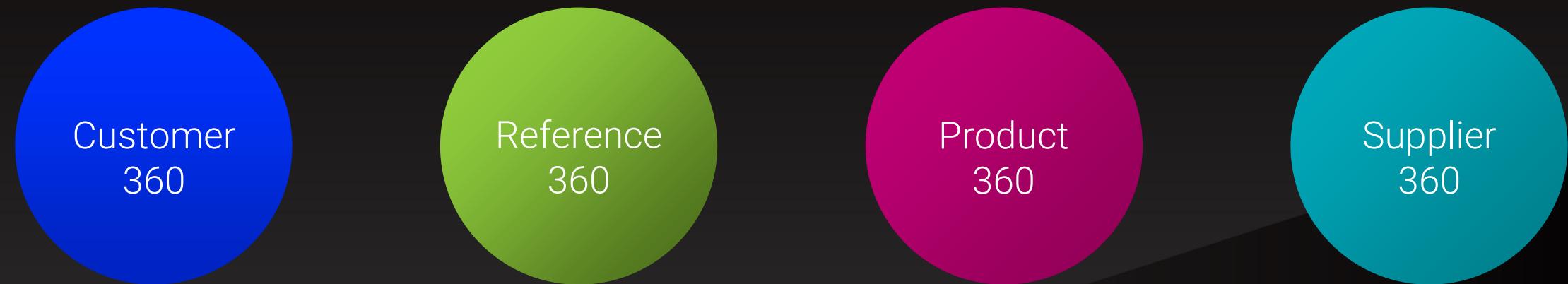
The "Output" section provides detailed statistics:

Record Pairs	Count
Total Record Pairs Generated	341
Processed By Declarative Rules	341
Identified for Automated Merge	212
Identified for Manual Merge	129
Processed by Machine Learning Model	0

The most complete cloud-native master data management platform that provides seamless connectivity, data integration, process orchestration, data quality, reference data management and master data management in a single solution



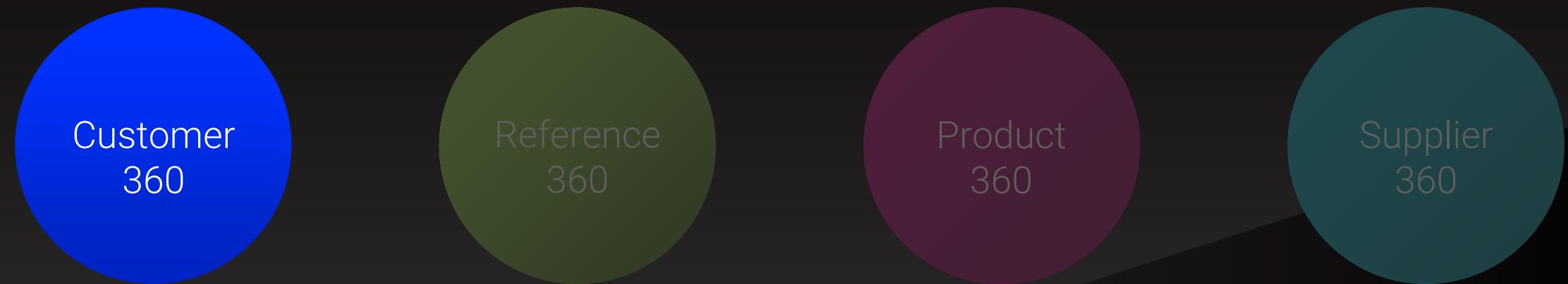
# MDM SaaS Domains



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+ Extensions and Industry Accelerators

# C360 SaaS



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+ Extensions and Industry Accelerators

# Customer 360 SaaS

Create consistent, complete, connected 360-degree customer profiles simply and at scale

- Speeds up implementation with pre-configured:
  - Customer data model for People and Organization data to support B2B and B2C use cases
  - Data stewardship user interface, with layouts and search configuration for the out-of-box customer data model
  - Reports and charts
  - Data stewardship approval workflows
- The model and business user interface can easily be extended and customized
- Packaged translations for labels in French, German, Japanese, Portuguese & Spanish

The image displays three distinct views of the Informatica Customer 360 SaaS platform:

- Data Model Configuration:** Shows the 'Data Model' section of the Informatica Business 360 Designer. It features a grid of entities such as 'Person', 'Household', 'Organization', 'Address', 'Email', 'Social Media', 'Demographic', 'Education', 'Occupation', 'Income', 'Loyalty', and 'Mobile'. Each entity has a preview icon and a 'Create' button.
- Dashboard:** Shows a 'Home' dashboard titled 'c360.dashboard.page'. It includes four main charts: 'Customer Distribution by State' (a map of the US with state counts), 'Customers By Loyalty Account Tier' (a donut chart), 'Customers By Phone Usage Type' (a bar chart), and 'Customers By Designation' (a donut chart).
- Customer Profile View:** Shows a detailed view of a customer record for 'Amanda Sharpe'. The profile includes personal information (First Name: Amanda, Middle Name: , Last Name: Sharpe, Title: , Birth Date: Aug 11, 1972), marital status (Married), and addresses (Personal: 640 Robert Park Dr Apt 378, Robert Park, California, United States of America). It also shows phone numbers (Personal: (203) 655-6890, Mobile: (203) 655-6809) and email addresses (Personal: amanda.sharpe@gmail.com, amanda\_sharpe@outlook.com).

# R360 SaaS

Customer  
360

Reference  
360

Product  
360

Supplier  
360

+ Extensions and Industry Accelerators

# Reference 360

Centralized definition, management, governance and sharing of Reference and Finance data sets

- Self-service module for business users to define reference data sets and rules
- Complex hierarchy support: multi-level hierarchies with support for different attributes at different levels
- Dependent and composite reference data options
- Crosswalks - translation mappings and crosswalk relationships with application-specific versions of the same dataset.
- 360-degree view graph: 360-degree view of any reference data value, including its hierarchy parent/children, crosswalk directional mappings, dependencies, and composite references.
- Configure complex expressions for advanced validations

The screenshot displays several windows from the Reference 360 application:

- Hierarchy Designer:** Shows a tree structure for defining hierarchies. One window shows a hierarchy for "Country" with levels "Country", "State/Mobile Entity", and "City". Another window shows a more complex hierarchy involving "ICCCodes\_CTRY\_NL" and "ICCCodes\_CTRY\_NL\_Hierarchies".
- GL Account:** A table view of General Ledger accounts. The table includes columns for Name, Code, Description, Account Type, Allow Budgeting, and Allow Posting. Examples shown include "Statistical", "Balance Sheet", "Net Income", "Revenue", "Expense", "Other Income", and "Other Expense".
- Data Import/Export:** A window titled "Select the type of asset you want." containing two buttons: "Reference Data Import" and "Reference Data Export".

# P360 SaaS

Customer  
360

Reference  
360

Product  
360

Supplier  
360

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# Product 360 SaaS

Cleanse, consolidate, relate and synchronize product master data and publish to consuming systems

- Preconfigured for product mastering, to match, merge and consolidate from various sources
- Business user workflows for content enrichment
- Custom content enrichment and approval workflows with human task interaction
- Out-of-the-box user interfaces for rapid application configuration to tailor the experience for any specific industry
- Built-in intelligence and orchestration with AI-driven data matching
- 360° relationship views across data domains

The screenshot displays two main sections of the Informatica Product 360 SaaS interface.

**Top Section: Product Master Record**

This section shows a detailed view of a product record for "Island Tropic Shimmer Sunscreen". Key details include:

- Product Information:** GTIN: 00811571013579, Brand: Island Tropics, Scent: Tropical Island, Status: Active.
- Description:** Island Tropics® Sheer Touch Ultra Radiance sunscreen lotion offers triple enhancement for radiant skin; it protects, softens, and leaves skin glowing. This luxurious formula has a hint of sheen and leaves your skin soft and luminous.
- Product Highlights:** Contains broad-spectrum sunscreen ingredients, Reef safe Sunscreen, made without oxybenzone and octinoxate.
- Maintenance Hierarchy:** Shows the product's classification under Beauty & Personal Care > Skin Care > Sunscreens.
- Ingredients:** Avobenzene, Glycerin, Mica, Octocrylene, Oxybenzone, Paraffin, Retinyl Acetate.
- Attribute Completeness:** A chart showing the completeness of attributes across English, German, and Spanish languages. For English, there are 1 Title, 1 Short Description, 1 Long Description, and 1 Keyword. For German, there are 1 Title, 1 Short Description, 1 Long Description, and 1 Keyword. For Spanish, there are 1 Title, 1 Short Description, 1 Long Description, and 1 Keyword.
- Related Records:** Lists similar items such as "Hawaiian tropic Silk Hydration" and "Hawaiian tropic Everyday Active".

**Bottom Section: Relationship Graph**

This section shows a network graph for a "Dell Switch Black 15.6 Inspiron" product. The central node is the Dell laptop, connected to various entities and their relationships:

- Target (represented by a house icon)
- amazon.com
- Walmart
- Costco
- Google Shopping
- Bestbuy
- Laptops
- Cooling Fan Iuchi Laptop Cooler
- Memory: 2 x 32 GB, DDR4, 3,200 MHz
- Wireless Killer™ Wi-Fi 6
- Motherboard Tomahawk AMD B550
- 17" UHD+ High Resolution Display
- User-facing camera 720p 30 ips HD

The graph also includes a legend for "amazon.com" (Record, Relationship, Active) and a filter for "Dell Inspiron" (Item sold by, Organisation).

# S360 SaaS

Customer  
360

Reference  
360

Product  
360

Supplier  
360

+ Extensions and Industry Accelerators

# Supplier 360 SaaS

Streamline vendor onboarding, materials procurement and accounts payable processes with supplier data management

- Preconfigured for rapid deployment of Supplier Mastering, with:
  - Out-of-the-box data models for Supplier and Contact
  - Workflows for approving and onboarding new suppliers
  - Supplier hierarchies, relationships, match models, and typical DQ rules
- Rich graphical views & shared alternate perspectives

The screenshot shows the Informatica Supplier 360 SaaS application. The top navigation bar includes 'Informatica' logo, 'Supplier 360', a search bar with 'lost\*', and various menu items like 'Supplier', 'lost\*', 'InformaticaWorld', and help icons. The main content area displays a supplier profile for 'Lost World Coffee' with ID '892345678'. The profile includes a logo, address ('7650, 27th Avenue | Bandung Indonesia | 87654'), and a phone number ('892345678'). It also lists 'Tactical Supplier' and 'Validated Supplier' status. A 'General Information' section contains details such as Industry Type (Agriculture), Business Type (Manufacturer), and various identifiers like NAICS Code (311920) and DUNS Number (892345678). Below this are sections for 'Address' (D&B Primary Address and Remittance), 'Supplier Alerts', and 'Documents'. On the right side, there's a sidebar with filters for 'Incorporated Since', 'Years', 'Months', and 'Days', followed by a chart titled 'Orders On-time and Quality' showing data from 2020 Q1 to 2022 Q1 for 'Total orders', 'Orders on time', and 'Orders quality approved'. At the bottom, there are sections for 'Executive Members' and 'Executive Members 1'.



# Extensions & Accelerators

Customer  
360

Reference  
360

Product  
360

Supplier  
360

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+ Extensions and Industry Accelerators

# Reduce implementation time and effort with accelerators

## Salesforce Extension for Customer360

Real-time and batch integration for Salesforce Accounts & Contacts

## Life Sciences Extension for Customer360

Master healthcare professionals and healthcare organizations

## SAP Extension for Customer360

Batch integration for Salesforce Accounts & Contacts

## Healthcare Extension for Customer360

Master Providers, Members, Patients, Plans

## Insurance Extension for Customer360

Master Customer, Agreement and Agent

# Salesforce Extension for Customer 360

Bi-directional batch integration with full & Incremental load; Real-time Integration from Salesforce to Customer 360; Search & Import similar records from Customer 360; Business Account, Person Account, Contact & respective relationships

- Key Assets:
  - Data Model Enhancements
  - Cloud Data Integration assets for Batch integration
  - Cloud Application Integration assets for real-time integration and search before create
  - Cloud Data Quality validation rules
  - Business UI Layouts

The screenshot shows the Informatica Mappings interface. On the left, there's a list of assets:

Asset Type	Asset Name	Date
Service Connector	C360SaaSConnector_GetOrganization	Oct 1
Service Connector	C360SaaSConnector_GetPersonAccount	Oct 6
Service Connector	C360SaaSConnector_Search	Oct 6
App Connection	Customer360	Nov 7
App Connection	Customer360	Nov 1
Guide	Customer360	Oct 2
Guide	Customer360	Oct 2
Guide	Customer360	Nov 1

The main area displays a matching records screen for the "Customer360" app connection. It shows a table of accounts from Salesforce:

ACCOUNT NAME	OWNERSHIP	PHONE
Apple Inc.	Public	4089961010
Apple American Group LLC	Liability Limited By Guarantee	2165252776
Apple Bank For Savings	Private	5166271801
Red Apple Group, Inc.	Private	2129565803
Apple Hospitality Reit, Inc.	Public	8043448121

Below the table, it says "Showing 1 to 5 of 5 entries". At the bottom, there are buttons for "View Record", "Back", and "Cancel".

On the right side, there's a list of mappings:

Mapping
infac360sf_m_salesforce_account_organization_inbound
infac360sf_m_salesforce_personaccount_person_inbound
infac360sf_m_salesforce_account_hierarchy_inbound
infac360sf_m_salesforce_person_contact_outbound
infac360sf_m_salesforce_accountpartner_partnerrel_inbound
infac360sf_m_salesforce_contact_person_inbound
infac360sf_m_salesforce_person_personaccount_outbound
infac360sf_m_salesforce_organization_account_outbound
infac360sf_m_salesforce_contact_contactrel_inbound

# SAP Extension for Customer 360

Inbound batch integration with SAP S/4 HANA and ECC for Customer record;  
Outbound batch integration with SAP S/4 HANA and ECC for Customer record (WIP); Incremental inbound from SAP (WIP)

- Key Assets:
  - Extended data model to support SAP Customer/Business partner
  - Additional Reference Data
  - Data Integration assets for Batch Integration
  - Customer UI Layouts



The screenshot shows a SAP Fiori application interface for a customer record. At the top, there is a navigation bar with icons for Home, Search, and Help. Below the navigation bar, the main content area displays a customer record for "RED APPLE GROUP, INC." with the following details:

- General Details:**
  - Name: RED APPLE GROUP, INC.
  - Date of Incorporation: 06/30/1998
  - Number of Employees: 672345
  - Liquidation Date: (empty)
- Tax Details:**
  - Andorra: Tax Register Number (NRT): 782390
- Address:**
  - Located At: 800 3rd Ave Fl 5, New York | New York | United States | 10022
- Customer Type:** (empty)
- Language:** English (selected)

On the right side of the screen, there is a list of data integration assets:

Category	Asset Name	Type
Reference Data	infac360sap_Occupation	Reference Data
Reference Data	infac360sap_PersonRoleType	Reference Data
Reference Data	infac360sap_TaxGrp	Reference Data
Source System	SAP_ECC	Source System
Source System	SAP_S4HANA	Source System
Rule Specification	infac360sap_ecc_rule_taxNumber	Rule Specification
Business Service	infac360sap_bs_login	Business Service
Mapping	infac360sap_mpplt_s4h_bp_inbound_rt	Mapping
Mapping	infac360sap_hs_s4h_person	Mapping
Mapping	infac360sap_m_s4h_c360_org_batch_inbound_email	Mapping
Mapping	infac360sap_m_ecc_c360_org_batch_inbound_address	Mapping
Mapping	infac360sap_m_ecc_c360_person_batch_inbound_lang	Mapping
Mapping	infac360sap_m_s4h_c360_person_batch_inbound_tax	Mapping
Mapping	infac360sap_m_s4h_c360_person_batch_inbound_citizenship	Mapping
Mapping	infac360sap_m_s4h_c360_person_batch_inbound_language	Mapping
Mapping	infac360sap_m_s4h_c360_org_batch_inbound_root	Mapping

# Life Sciences Extension for Customer 360

HCO & HCP mastering; Data Onboarding from NPPES, MedPro & Salesforce; Customer segmentation and targeting Affiliations Management; 360° view of HCO & HCP; Custom Reports

- Key Assets:
  - Extended Data model for HCO & HCP
  - Integration assets for NPPES, Salesforce & MedPro
  - Data validation and enrichment with Data Quality & DaaS rules
  - Enhanced Match model for HCO & HCO
  - UI layouts including dashboard, create/edit pages and custom reports

The screenshot displays the Informatica Life Sciences Extension for Customer 360. It includes:

- Physician Profile:** A detailed view of "Carolina Salvador" (Prescriber, Physician) with sections for Summary, Details, Source Records, Relationships, and History. It shows her specialty as Internal Medicine Physician, Hematology & Oncology, and her license information.
- Hospital Hierarchy:** A tree view of "Sutter Health" facilities, including Sutter Bay Hospitals (California Pacific Medical Center, California Pacific Medical Ctr - St. Luke's Campus, California Pacific Medical Ctr-Pacific Campus Hosp, California Pacific Medical center - Davies Campus, Eden Medical Center, Menlo Park Surgical Hospital, Mills-Peninsula Medical Center, Novato Community Hospital, Sutter Lakeside Hospital, Sutter Maternity & Surgery Center of Santa Cruz, Sutter Santa Rosa Regional Hospital), Sutter Valley Hospitals (SUTTER AMADOR HOSPITAL, SUTTER AUBURN FAITH HOSPITAL), and Sutter In St. Louis.
- Data Mapping:** A "Mapping" tool showing connections between various entities: BJC Healthcare, Barnes-Jewish Hospital, Washington University School of Medicine In..., Barnes-Jewish Center For Advanced Medicine, Stephen Yuan-tung Liang, Carolina Salvador, and Tareq Issam Nabhan.

# Healthcare Extension for Customer 360

Enterprise view of Healthcare Master Data such as members/patients, household, providers, contract, plan

- Key Assets:
  - Extended Data Model and relationships
  - Salesforce & Life Science Extension Integration Assets
  - Customized role-based UI Layouts
  - Data Quality rules and match rules
  - Custom Reports

The screenshot displays two main components of the Informatica Healthcare Extension for Customer 360:

- Master Data Record View:** On the left, a detailed view of a healthcare member named Pauline Smith. The summary tab shows her profile picture, name, email (8465392743, pauline\_s@gmail.com), and address (900 Marcia St SW, Grand Rapids, Michigan, United States, 49509). Below this, a timeline indicates she has been a member since Jun 01, 1999, for 23 years, 0 months, and 14 days. A "Decision Maker" section is shown, along with sections for Personal Information (including birth date 02/12/1980, birth place Grand Rapids, gender Female, designation Senior Auditor, marital status Married, and type Member), Address (Home and Office), Phone (Home and Personal), Email Address (Personal), and Communication (Phone and Email).
- Relationship Network Graph:** On the right, a network graph illustrating relationships between various entities. Entities include Jennifer Marie Lachapell, Patrick Smith, Liam Smith, The Smiths, Pauline Smith, Christina V Jacobs, and KPMG. Relationships are represented by lines connecting nodes, with numerical values indicating the strength or count of connections (e.g., 1/2, 4/6, 3, 7, 2/4, 1, 1/2). Contracts are also shown, such as Contract: PPO-10021 and Contract: PREMIERE-342110.

At the bottom, a table provides details on rule associations for data quality, including columns for Rule Association Name, Status, and Description.

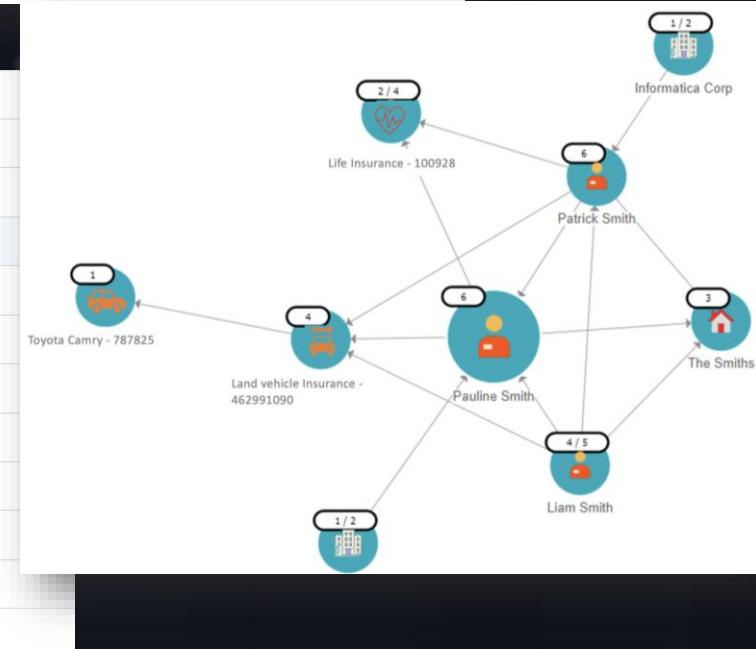
Rule Association Name	Status	Description
DUNS/SSN/Validation_AlternateIdentifier	Enabled	V
infoc360ls_ra_hcp_npi_check_alt_id_value	Enabled	
infoc360ls_ra_hcp_concat_full_Name	Enabled	
infoc360_ls_ra_taxonomyReturnsSpecialty	Enabled	
infoc360_ls_ra_taxonomyReturnsSubSpecialty	Enabled	
infoc360_ls_ra_taxonomyReturnsGroup	Enabled	
infoc360_ls_ra_taxonomyReturnsName	Enabled	
infoc360ls_ra_taxonomyReturnsSpeciality	Enabled	

# Insurance Extension for Customer 360

Create enterprise view of master data such as Customer, Policy, Agent across multiple Policy & Claim Systems

- Key Assets:
  - Extended Data Model and relationships
  - Customized role-based UI Layouts
  - Data Quality rules and match rules

The screenshot shows the Informatica Data Modeler interface for the 'Agreement' model. The 'Attributes' tab is active, displaying a grid of data fields. Several fields are highlighted with orange boxes: 'Agreement Desc', 'Agreement End Date', 'Agreement Name', 'Agreement Number', 'Agreement Start Date', 'Agreement Type', 'Amount', 'Approval', 'Overall', and 'Total C'. Below the attributes, there are sections for 'Business Entity' and 'Reference Data'. The 'Business Entity' section includes 'Land Vehicle', 'Product', 'Household', and 'Agreement'. The 'Reference Data' section lists numerous reference data tables starting with 'infac360in\_'. The top navigation bar includes tabs for 'Model', 'Data Flow', 'Consumption', and 'Events'.



# How to download and install Extensions

- Extension bundles are available as a downloadable archive
- Download links are available on request through Global Customer Support
- Setup guide is available in the online help for the Business 360 Console

The screenshot shows a portion of the Business 360 online help documentation. At the top left is a "TABLE OF CONTENTS" sidebar with a search bar. Below it is a list of topics, many of which have orange chevrons indicating they are expandable. The topic "Deploying extensions" is highlighted with an orange background, and its sub-topics "Salesforce extension for Customer 360" and "Life Sciences extension for Customer 360" are also visible. On the right side, there is a navigation menu with "Business 360" and a "Deploying extensions" section. The main content area contains a brief introduction to extensions.

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▶ Introducing Informatica Cloud Business 360 Console

▶ Managing user roles

▶ Defining the data model

▶ Defining source systems

▶ Configuring data quality

▶ Configuring match and merge

▶ Configuring survivorship

▶ Defining jobs

▶ Defining business events

▶ Designing user interface

▶ Migrating assets

▶ Monitoring jobs

▶ Monitoring match model jobs

▶ Business 360 REST API

▶ **Deploying extensions**

▶ Salesforce extension for Customer 360

▶ Life Sciences extension for Customer 360

☰ Business 360

## Deploying extensions

An extension is a ready-to-use package that extends Business 360 with new business entities, reference data, relationships, and logic to support the jobs. You can use an extension as a template to...

Business 360 Console currently supports the following extensions:

- Salesforce
- Life Sciences

**Related Topics**

[Salesforce extension for Customer 360](#)

[Life Sciences extension for Customer 360](#)

## IDMC Custom Workflow Overview

Cliff Darroch · Principal Product Specialist  
Global Partner Technical Sales · GPTS

2023

# Where data comes to



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We'll review a Business Event named HCO Custom Workflow

Events (14)							Updated at Feb 08, 2023, 3:26:43 PM	⟳	↓↑	Filter	Add Event ▾
Name	Event Type	Event for	Affected User Roles	Workflow	Tasks	Updated On					
<a href="#">HCO Custom Workflow</a>	User-Triggered	HCO (BE)	Supplier 360 Analyst	Custom Workflow HCO	Unassigned Tasks, POP Health Rev...	Nov 02, 2022, 05:51 AM					trash
HCO Custom Workflow	User-Triggered	Supplier (BE)	Supplier 360 Analyst, Supplier 36...	mdmFourStepApproval	First Review, Second Review, Third ...	Oct 31, 2022, 09:57 AM					
<a href="#">Update HCO Business Event</a>	User-Triggered	HCO (BE)	Customer 360 Analyst	mdmOneStepApproval	Final Review	Oct 06, 2022, 11:45 AM					
<a href="#">Merge HCO Business Event</a>	User-Triggered	HCO (BE)	Customer 360 Analyst	mdmOneStepApproval	Final Review	Oct 06, 2022, 11:43 AM					
<a href="#">Merge Employee Business Event</a>	User-Triggered	Employee (BE)	Customer 360 Analyst	mdmOneStepApproval	Final Review	Oct 05, 2022, 09:29 AM					
<a href="#">Update Employee Business Event</a>	User-Triggered	Employee (BE)	Customer 360 Analyst	mdmOneStepApproval	Final Review	Oct 05, 2022, 08:18 AM					
<a href="#">Merge Patient Business Event</a>	User-Triggered	Patient (BE)	Customer 360 Analyst	mdmOneStepApproval	Final Review	Oct 05, 2022, 08:04 AM					
<a href="#">Update Patient Business Event</a>	User-Triggered	Patient (BE)	Customer 360 Analyst	mdmOneStepApproval	Final Review	Sep 26, 2022, 07:36 PM					
<a href="#">Create Patient Business Event</a>	User-Triggered	Patient (BE)	Customer 360 Analyst	mdmOneStepApproval	Final Review	Sep 26, 2022, 07:34 PM					
<a href="#">Merge HCP Business Event</a>	User-Triggered	HCP (BE)	Customer 360 Analyst	mdmOneStepApproval	Final Review	Sep 26, 2022, 07:31 PM					
<a href="#">Update HCP Relationship Business...</a>	User-Triggered	Provider Patient Hierarchy (Hierarc...	Customer 360 Analyst	mdmOneStepApproval	Final Review	Sep 22, 2022, 05:40 PM					
<a href="#">Update HCO Network Relationshi...</a>	User-Triggered	Healthcare Organization Hierarch...	Customer 360 Analyst	mdmOneStepApproval	Final Review	Sep 22, 2022, 05:39 PM					
<a href="#">Create HCP Business Event</a>	User-Triggered	HCP (BE)	Customer 360 Analyst	mdmTwoStepApproval	First Review, Final Review	Sep 22, 2022, 03:41 PM					
<a href="#">Update HCP Business Event</a>	User-Triggered	HCP (BE)	Customer 360 Analyst	mdmOneStepApproval	Final Review	Sep 22, 2022, 03:24 PM					



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HCO Custom W...

## HCO Custom Workflow

Event

Workflow Tasks

Workflow Properties

Define the details of the event and the event scenarios that trigger the workflow.

### Event Details

Event Type: User-Triggered Event

Display Name: HCO Custom Workflow

Internal ID: hco\_custom\_workflow

Workflow Trigger:  Required  Optional

Affected User Roles:

Supplier 360 Analyst

- Customer 360 Data Steward
- Customer 360 Manager
- Customer 360 Analyst
- Supplier 360 Data Steward
- Supplier 360 Risk Manager
- Supplier 360 Contract Manager
- Supplier 360 Credit Manager
- Supplier 360 Commodity Manager
- Supplier 360 Analyst
- Supplier 360 Task Admin
- Product 360 Manager

### Event Scenarios

Asset Name: Asset Name

HCO

It may be triggered by any  
one or more of the  
provisioned roles



### Actions\*

Create, Manual Merge



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HCO Custom W...

## HCO Custom Workflow

Save

[Event](#)[Workflow Tasks](#)[Workflow Properties](#)

Define the details of the event and the event scenarios that trigger the workflow.

### Event Details

Event Type: User-Triggered Event

Display Name:

Internal ID:  (?)

Workflow Trigger: (?)  Required  Optional

Affected User Roles:  (X)

It may be triggered on  
any one or more of  
these actions

### Event Scenarios

Asset Name \*

Asset Type \*

Actions \*

(X)

Business Entity

(X)  (X)



For any  
Business Entity

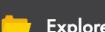
- Create
- Update
- Delete
- Unmerge
- Manual Merge



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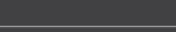
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HCO Custom W...

## HCO Custom Workflow

Event

Workflow Tasks

Workflow Properties

Select the workflow you want and configure the applicable user roles.

### Workflow

Name:<sup>\*</sup>

Additional Workflows...

Process:<sup>\*</sup>

MDM One Step Approval

MDM Two Step Approval

MDM Four Step Approval

#### Tasks

Name

Additional Workflows...

Find

When this option is selected



#### Unassigned Tasks

POP Health Review

HIMS Review

### Task Details

Task Name: Unassigned Tasks

Task Label:

Approvers:<sup>\*</sup>

Supplier 360 Risk Manager

Task Actions: Assign to HIMS , Assign to POP Health , Reject , Approve

### Page Settings

### Organization Page

Create:<sup>\*</sup>

HCO - Edit Page BB

Merge:<sup>\*</sup>

HCO - Edit Page





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HCO Custom W...



## HCO Custom Workflow

Event

Workflow Tasks

Workflow Properties

Select the workflow you want and configure the applicable user roles.

### Workflow

Name:<sup>\*</sup>

Additional Workflows...

Process:<sup>\*</sup>

Custom Workflow HCO



Select a process that includes a human task

Find

A published CAI Workflow Process may be selected

### Tasks

#### Name

Unassigned Tasks

POP Health Review

HIMS Review

### Task Details

Task Name:

Unassigned Tasks

Task Label:

Approvers:<sup>\*</sup>

Supplier 360 Risk Manager

Task Actions:

Assign to HIMS, Assign to POP Health, Reject, Approve

### Page Settings

### Organization Page

Create:<sup>\*</sup>

HCO - Edit Page BB

Merge:<sup>\*</sup>

HCO - Edit Page



Informatica Business 360 Console ▾ Healthcare ▾

New... Save X

HCO Custom Workflow

Select a process that includes a human task

All Assets (35)

Name Type Date Description Tags

Name	Type	Date	Description	Tags
Custom Workflow HCO	Process	Dec 19, 2022, 3:37 PM	CAI\Custom Workflow	
GetOrganizationPendingDetails	Process	Dec 19, 2022, 3:35 PM	CAI\Custom Workflow	
ProcessWorkflowTasks	Process	Dec 14, 2022, 1:09 PM	CAI\Custom Workflow	
logEvent	Process	Nov 16, 2022, 9:36 AM	CAI	
MDMSearchIndex	Process	Nov 11, 2022, 9:48 AM	Business360	
MDMIngress	Process	Nov 11, 2022, 12:04 AM	Business360	
MDMMatchMerge	Process	Nov 11, 2022, 12:04 AM	Business360	
MDMExtractandValidate	Process	Nov 11, 2022, 12:04 AM	Business360	
MDM Multi-Step Approval Tem...	Process	Nov 11, 2022, 12:04 AM	Business360	
MDMEgress	Process	Nov 11, 2022, 12:04 AM	Business360	
MDMPublishBusinessEvents	Process	Nov 11, 2022, 12:04 AM	Business360	

When the process is highlighted and selected

1 - 25 of 35 Items Page 1 of 2 Items Per Page: 25 Select Cancel

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Event

Workflow Tasks

Workflow Properties

Select the workflow you want and configure the applicable user roles.

## Workflow

Name:<sup>\*</sup>

Additional Workflows...

Find

Process:<sup>\*</sup>

Custom Workflow HCO



### Tasks

#### Name

Unassigned Tasks

POP Health Review

HIMS Review

The task names are interpreted from the CAI Process

### Task Details

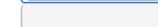
Task Name:

Unassigned Tasks

Task Label:

Approvers:<sup>\*</sup>

Supplier 360 Risk Manager



Any one or more of the provisioned roles may interact on the workflow as an Approver



Task Actions:

 Customer 360 Data Steward Customer 360 Manager Supplier 360 Risk Manager Supplier 360 Contract Manager Supplier 360 Credit Manager Supplier 360 Commodity Manager Supplier 360 Task Admin Product 360 Manager

### Page Settings

### Organization Pag

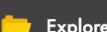
Create:<sup>\*</sup>Merge:<sup>\*</sup>



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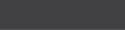
Business Events



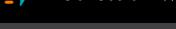
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HCO Custom Workflow

## HCO Custom Workflow

Event

Workflow Tasks

Workflow Properties

Select the workflow you want and configure the applicable user roles.

### Workflow

Name:\*

Additional Workflows...

Process:\*

Custom Workflow HCO

Find



### Tasks

Name

Unassigned Tasks

POP Health Review

HIMS Review

Find

### Task Details

Task Name:

POP Health Review

Task Label:

Approvers:\*

Supplier 360 Contract Manager

Task Actions:

 Customer 360 Data Steward Customer 360 Manager Supplier 360 Risk Manager Supplier 360 Contract Manager Supplier 360 Credit Manager Supplier 360 Commodity Manager Supplier 360 Task Admin Product 360 Manager

Page Settings

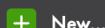
Organization Page

Create:\*

Merge:\*

Different Tasks may have any one or more different approvers





New...

Event

Workflow Tasks

Workflow Properties

Select the workflow you want and configure the applicable user roles.

## Workflow

Name:<sup>\*</sup>

Additional Workflows...

Process:<sup>\*</sup>

Custom Workflow HCO

Find



## Tasks

## Name

Unassigned Tasks

POP Health Review

HIMS Review

Any task, can have any one or more of the provisioned roles as the Approver, and each task may be associated with different configurable Page Layouts. Task Actions are configurable and will be displayed on the button labels in the Workflow Inbox

## Task Details

Task Name:

HIMS Review

Task Label:

Approvers:<sup>\*</sup>

Supplier 360 Credit Manager

Task Actions:

Approve , Reject , Send Back , Assign to POP Health

## Page Settings

## Organization Page

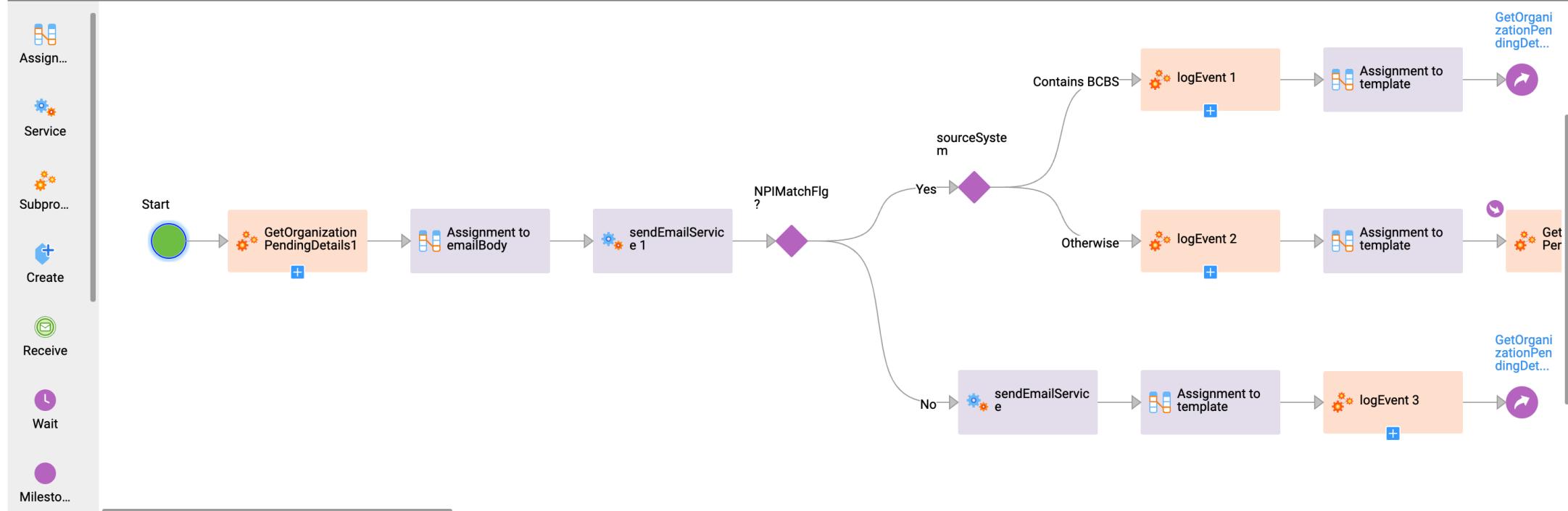
Create:<sup>\*</sup>

HCO - Edit Page

Merge:<sup>\*</sup>

HCO - Edit Page BB

## Design



## Custom Workflow HCO Properties

## General

Input Format:  Fields  Whole payload

## Start

## Input Fields

Name	Type	Description	Required
input	Text		<input type="checkbox"/>
template	Template		<input type="checkbox"/>
taskTypes	Task Types		<input type="checkbox"/>

## Output Fields

## Temp Fields

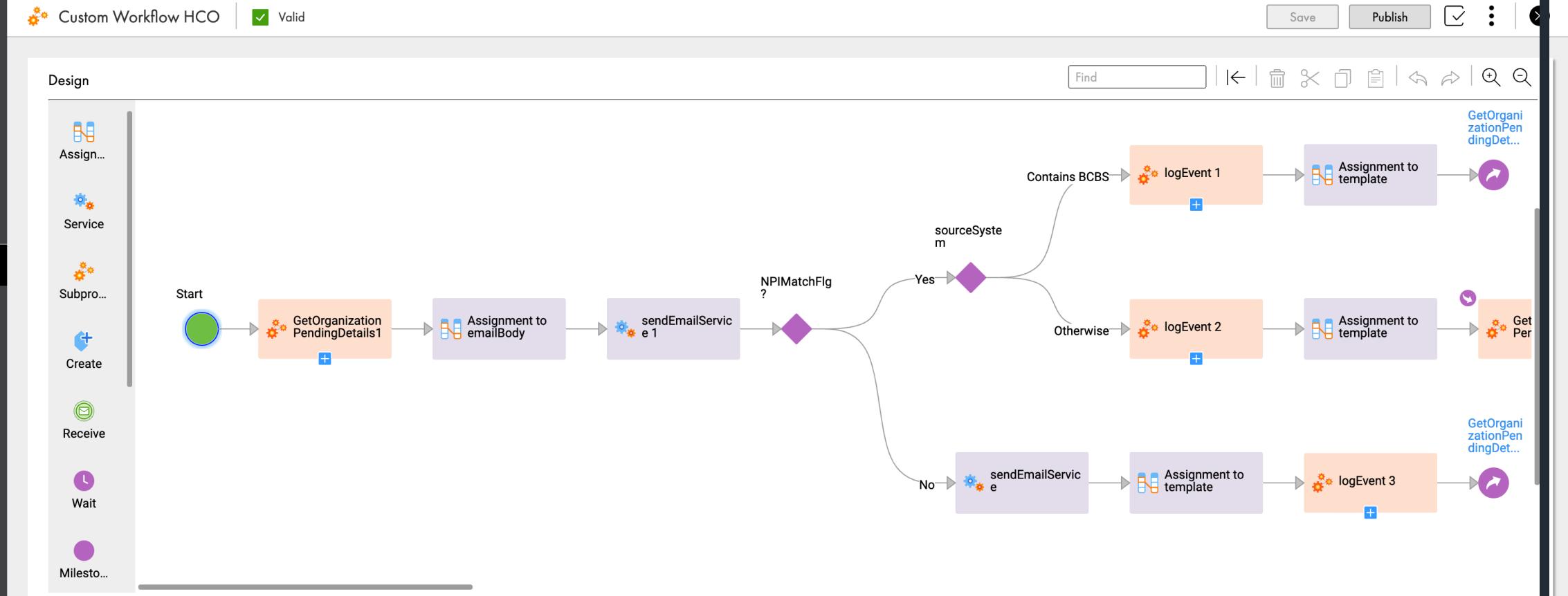
## Messages

## Advanced

Workflow Inputs



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#### Custom Workflow HCO Properties

##### General

Output Format:  Fields  Whole payload

##### Start

Output Fields (2)

##### Input Fields

##### Output Fields

Name	Type	Description	Initial Value
approved	Text		
approvedBy	Text		

##### Temp Fields

##### Messages

##### Advanced

Workflow outputs

Output Fields

New... MDMSaaSAPI Valid Save Publish Actions Process Objects

Actions (22)

Action Name	Action Type	Description
authenticate	general	X
getChangeList	general	X
getEntity	general	X
getSubtype	general	X
searchPackagedProduct	general	X

Action Input Binding Output Test Results

URL\*: `https://usw1-mdm.dmp-us.informaticacloud.com/ui-x360-app/api/services/bes/api/v1/entity/{$entity}/{$internalId }?_showContentMeta=true` fx

Verb: GET

Multi Using: Semicolon separated

Authentication Type: Custom

HTTPS/Mutual Authentication:

Other Parameters Show Advanced +

Name*	Source
IDS-SESSION-ID	<code>{\$sessionId }</code>
Content-Type	application/json
Changelist	<code>{\$changelist }</code>

This is how we see the details of what is in the changelist

New... Edit Publish Find ⌂ ⌓

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Design

Start

```
graph LR; Start((Start)) --> Assignment[Assignment to changelistId]; Assignment --> Authenticate[Authenticate]; Authenticate --> getTaskDetails[getTaskDetails]; getTaskDetails --> GetOrganizationDetails[GetOrganization Details]; GetOrganizationDetails --> GetUserDetails[GetUserDetails]; GetUserDetails --> getCandidate[getCandidate]; getCandidate --> NPIMatchDetermination[NPIMatchDetermination]; NPIMatchDetermination --> AssignOutput[Assign Output]
```

This is important to be able to “query” the Pending record in the internal API.

getTaskDetails Properties

General Service Input Fields (2) Fault Handling Timer Events

Name	Required	Value
sessionId	<input type="checkbox"/>	output.sessionId
changelist	<input checked="" type="checkbox"/>	fn:replace(\$input.changelist,'(.*)("changeListId">)([^<"]*)(.*)','\$3')

New... Edit Publish Find ⌂ ⌓

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Design

Start

```
graph LR; Start((Start)) --> Assignment[Assignment to changelistId]; Assignment --> Authenticate[Authenticate]; Authenticate --> getTaskDetails[getTaskDetails]; getTaskDetails --> GetOrganizationDetails[GetOrganization Details]; GetOrganizationDetails --> GetUserDetails[GetUserDetails]; GetUserDetails --> getCandidate[getCandidate]; getCandidate --> NPIMatchDetermination[NPIMatchDetermination]; NPIMatchDetermination --> AssignOutput[Assign Output]
```

GetOrganizationDetails Properties

General Service Input Fields (4) Fault Handling Timer Events

Name	Required	Value
sessionId	<input type="checkbox"/>	output.sessionId
changelist	<input type="checkbox"/>	fn:replace(\$input.changelist,'(.*)("changeListId">)([<^]*)(.*)','\$3')
internalId	<input type="checkbox"/>	output.internalId
entity	<input type="checkbox"/>	c360.organization

[https://usw1-cai.dmp-us.informaticacloud.com/activevos-central/projres/apps/editor-app/screenflow-editor-app.html?entryType=application%2Fxml%2Bprocess&readOnly=true&rev=22.1201.00-SNAPSHOT\\_2022-12-08&\\_aeDev=false#ae\\_sf\\_propertiesheet\\_service\\_tab\\_input\\_wrapper](https://usw1-cai.dmp-us.informaticacloud.com/activevos-central/projres/apps/editor-app/screenflow-editor-app.html?entryType=application%2Fxml%2Bprocess&readOnly=true&rev=22.1201.00-SNAPSHOT_2022-12-08&_aeDev=false#ae_sf_propertiesheet_service_tab_input_wrapper)

Informatica Application Integration ▾ Healthcare ▾ ⌂ ⌃ ?

New... Home Explore My Processes My Import/Export Logs Configure Guides Custom Workflow ... GetOrganizationP... Custom Workflow HCO Valid

Save Publish Find ⌂ ⌃ ⌄ ⌅ ⌆ ⌇ ⌈ ⌉ ⌊ ⌋ ⌊ ⌋

Design Process flow

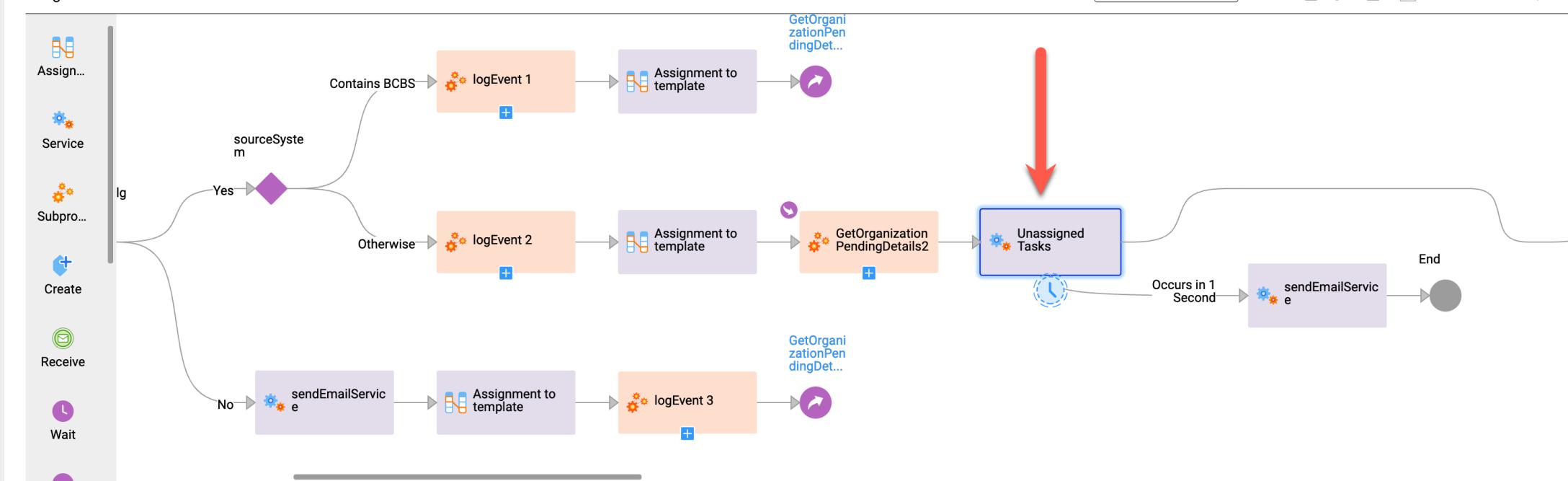
The process flow diagram shows a decision point based on the 'sourceSystem'. If 'Yes', it leads to 'logEvent 1' followed by 'Assignment to template' and a self-loop. If 'Otherwise', it leads to 'logEvent 2', 'Assignment to template', 'GetOrganizationPendingDetails2', 'Unassigned Tasks' (with a timer event 'Occurs in 1 Second'), and finally 'sendEmailService'. A feedback loop from 'Unassigned Tasks' goes back to 'Assignment to template' before 'logEvent 2'. There is also a direct path from 'sourceSystem' to 'sendEmailService' if 'No'. The process ends at 'End'.

Use the details of the information gathered in the previous subprocess to configure personalized emails and workflow templates

With the details of the Changelog a User Task may be invoked

Unassigned Tasks Properties

General	Service Type:	System Service	
Service	Action:	Generic User Task	
Input Fields	Description No description		
Fault Handling			
Timer Events	Name	Required	Type
Message Events	Template	<input checked="" type="checkbox"/>	Object_ID_(Process_Objects:template)
	TaskTypes	<input checked="" type="checkbox"/>	Object_ID_(Process_Objects:TaskTypes)
	Change List	<input checked="" type="checkbox"/>	Text



 Unassigned Tasks Properties

General	Input Fields (5)		
Service	Name	Required	Value
	Template	<input checked="" type="checkbox"/>	Field <input type="button" value="template ▾"/>
	TaskTypes	<input checked="" type="checkbox"/>	Field <input type="button" value="taskTypes ▾"/>
	Change List	<input checked="" type="checkbox"/>	Field <input type="button" value="input ▾"/>
	TaskName	<input checked="" type="checkbox"/>	Content <input type="button" value="Unassigned ▾"/>

## Task Name is displayed in the Workflow Inbox

Actions are correlate to  
the buttons in the UI

- + New
- Home
- Search
- File Import
- Workflow Inbox
- Hierarchies
- My Jobs
- Reports

## Workflow Inbox

Quick Filters

Open Tasks (2)

Task ID	Title	Task	Priority	Status	Owner	Creator
789655592431046656	Match-Merge Exception: ORACLE - Another Email Test	Unassigned Tasks	Medium	Unassigned		hc_matt
789639939988967424	Match-Merge Exception: ORACLE - Matt Test Record Emails	Unassigned Tasks	Medium	Unassigned		hc_matt

This can be configured in CAI to say whatever you want

High, Medium or Low

This correlates to the Task Name in CAI

This value is configurable

Adjust the task duration in CAI to a standard value

### Unassigned Tasks | Match-Merge Exception: ORACLE - Matt Test Record Emails

Task: Unassigned Tasks  
Status: Unassigned  
Priority: Medium

Assigned To:  
Created By: hc\_matt  
Modified By:

Due By: 12/26/2022  
Created On: 12/19/2022  
Modified On: 12/19/2022

#### Description

Source is not BCBS and NPI is consistent

CLAIRE

The I in IDMC

---

Kilian Ingelfinger · Sr Solutions Consultant

Global Partner Technical Sales · GPTS

2023

# Where data comes to



# Intelligent Data Management Cloud



**CLAIRe®**

AI-Powered Metadata Intelligence & Automation

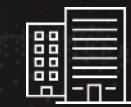
## Connectivity

Metadata System of Record

Multi-Cloud



Hybrid



On-premises



Enterprise Cloud

Intelligent and Scalable for the  
Most Demanding Enterprises

Manual efforts  
**reduced by up to 10X**

49 Trillion

Analysts and data scientists  
find **trusted data faster**

CL<sup>AIRE</sup>®

AI-powered Metadata  
Intelligence & Automation

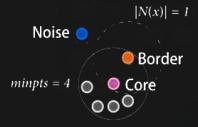
**Boosts productivity** for data  
engineers and data stewards

8 Petabytes

# CLAIRE Everywhere: Broadest Deployment of AI/ML Algorithms

**CLAIRE™**

DBSCAN



$$\text{Jaccard distance} = 1 - \frac{|S(X) \cap S(Y)|}{|S(X) \cup S(Y)|}$$

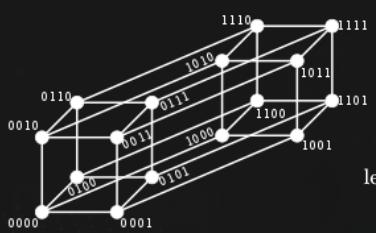
Jaro-Winkler Similarity – Matching

$$sim_w = sim_j + \ell p(1 - sim_j),$$

Taylor Series

$$\sum_{n=0}^{\infty} \frac{f^{(n)}(c)(x-c)^n}{n!}$$

Hamming Distance – Matching



Levenshtein Distance – Matching

$$\text{lev}_{a,b}(i,j) = \begin{cases} \max(i,j) & \text{if } \min(i,j) = 0, \\ \min \left\{ \begin{array}{l} \text{lev}_{a,b}(i-1, j) + 1 \\ \text{lev}_{a,b}(i, j-1) + 1 \\ \text{lev}_{a,b}(i-1, j-1) + 1_{(a_i \neq b_j)} \end{array} \right\} & \text{otherwise.} \end{cases}$$

Graph-based Entity Formation

```
as('x').repeat(or(inE('Link').hasLabel('link'),
bothE('SameAs').has('Confidence',gte(0.9
53d)))...)
```

Decision Tree



$$\text{Rand Index} = \frac{TP + TN}{TP + FP + FN + TN}$$

Needleman-Wunsh

$$F_{ij} = \max_{h < i, k < j} \{F_{h,j-1} + S(A_i, B_j), F_{i-1,k} + S(A_i, B_j)\}.$$

NLP Algorithm

Name	Asset Type	Business Term Recommendation
Mil_ID	Column	Military ID Number
Med_Nmbr	Column	Practitioner Medicare number
C_ADJ_KEY	Column	Claim Adjustment Key
NH_Plan_ID	Column	National Health Plan Identifier
DSCH_STAT_CD	Column	Discharge Status Code
NatEmp_ID	Column	National Employee Identifier

K-Means

$$\mu_j := \frac{\sum_{i=1}^m \mathbf{1}\{c^{(i)} = j\} x^{(i)}}{\sum_{i=1}^m \mathbf{1}\{c^{(i)} = j\}}.$$

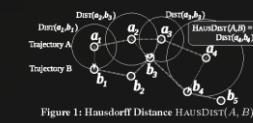
BIRCH



Context Matching

$$\begin{aligned} P(R_u R_v) &= \frac{M}{M + \prod_{i=1}^n (1 - W_i)} \\ \text{where } M &= \prod_{i=1}^n W_i \\ n &= \text{number of comparison functions} \\ W_i &= \begin{cases} p_{i,\text{low}} & \text{when } c_i < 0.50 \\ (p_{i,\text{high}} - 0.5)/c_i + 0.5 & \text{when } c_i >= 0.5 \end{cases} \\ c_i &= \text{the probability of comparing two objects that can be either homogeneous or heterogeneous} \end{aligned}$$

Hausdorff



Welch's Method for spectrum analysis

$$\hat{S}_x^W(\omega_k) \triangleq \frac{1}{K} \sum_{m=0}^{K-1} P_{x_m, M}(\omega_k).$$

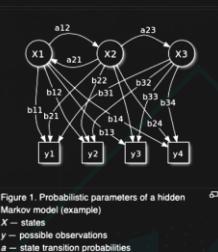


Figure 1: Probabilistic parameters of a hidden Markov model (example)  
X – states  
y – possible observations  
a – state transition probabilities  
b – output probabilities

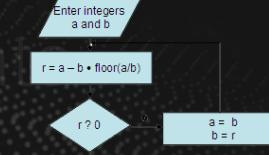
StackRank

$$\sqrt{\sum \text{Position}_{\text{Column}_i}}$$

Bray Curtis Similarity

$$\frac{\sum_{i=1}^n |X_i - Y_i|}{\sum_{j=1}^n X_j + Y_j}$$

Euclidean



Naïve Bayes Classifier

$$p(x = v \mid C_k) = \frac{1}{\sqrt{2\pi\sigma_k^2}} e^{-\frac{(v-\mu_k)^2}{2\sigma_k^2}}$$

$$100 - \text{Min} \left( \left[ \text{Min} \left( 10, \frac{\text{StackRank}_{\text{UniqueKey}_i}}{5} \right) + \left( \text{Tanh} \left( \frac{\#\text{RowsWithNulls}}{\text{TotalRows}} \right) * 100\% \right) \right], 100 \right)$$

Grubb's test

$$G = \frac{\max_{i=1,\dots,N} |Y_i - \bar{Y}|}{s}$$

$$p(x) = e^{-1+\eta_0} \cdot e^{\sum_{j=1}^n \lambda_j f_j(x)} = \exp \left( \sum_{j=0}^n \lambda_j f_j(x) \right).$$

Max Entropy Classifier

Informatica

# Productivity is Driven by Automation

**CLAIRE™**



# How we increase Productivity



**CLAIRE™**

Metadata-driven  
Artificial Intelligence

- ◆ **Data Integration**  
automates design and development of business logic to process data
- ◆ **API & App Integration**  
optimizes application resource utilization and secures APIs
- ◆ **Data Quality**  
automatically generates data quality rules and monitors, identifies and fixes issues
- ◆ **Master Data Management**  
automates matching, linking and merging of data
- ◆ **Customer & Business 360**  
automates matching data, identifying relationships and inferring insights
- ◆ **Data Catalog**  
automates discovery, tagging, classifying and identifying data relationships
- ◆ **Governance and Privacy**  
automatically links governance policies to enterprise data

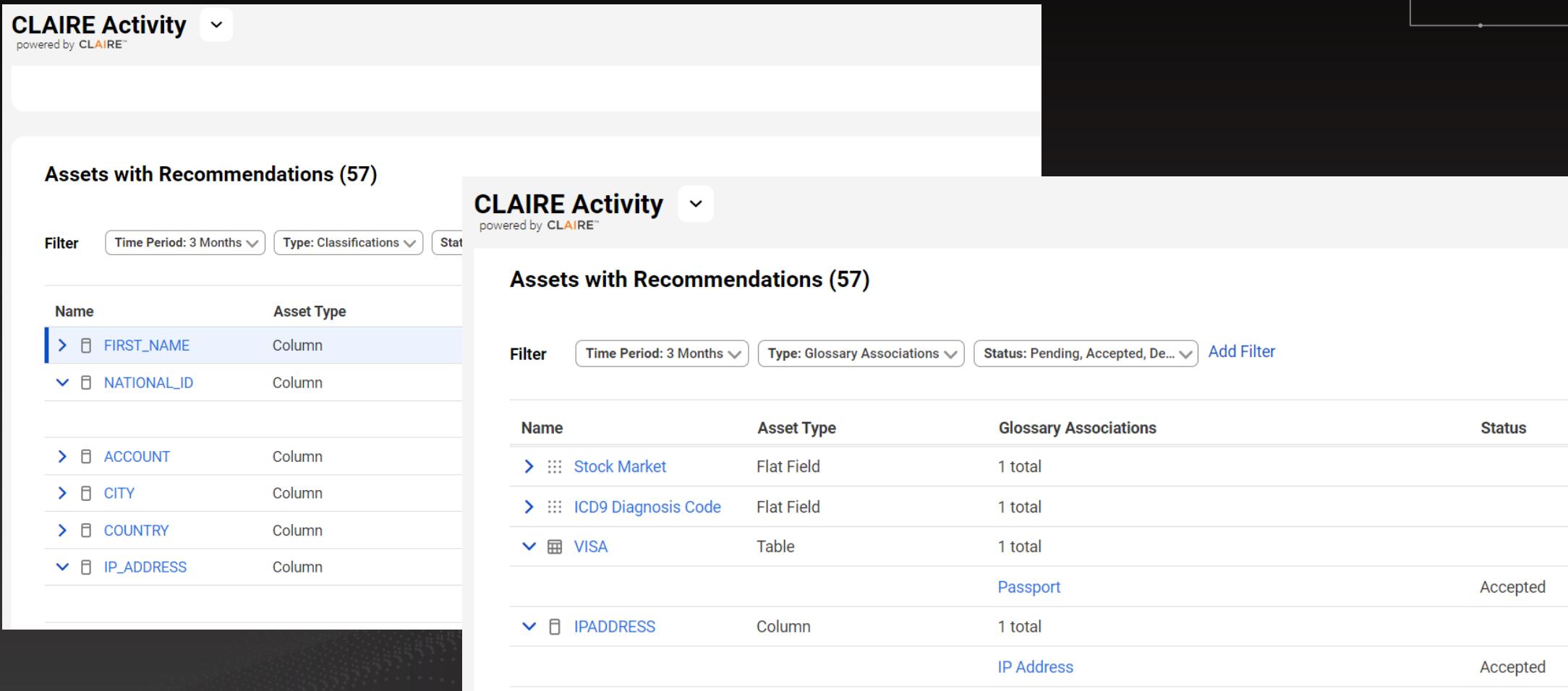
# CLAIRE Auto-Tuning in Advanced Integration

The screenshot shows the Informatica Advanced Integration interface with the following components:

- Top Navigation:** CLAIRE Tuning dropdown menu.
- Left Sidebar:** CLAIRE Tuning dropdown menu, followed by three buttons: Initial Tuning, Initial Tuning Results, and Continuous Tuning.
- Initial Tuning Panel:** A panel titled "Initial Tuning" with a sub-section "Continuous Tuning". It contains a message about getting recommendations for Spark properties and a checkbox for "Enable continuous tuning".
- Continuous Tuning Overlay:** A modal dialog titled "Continuous Tuning" with a message about silent monitoring and updating properties. It has an "Enable continuous tuning" checkbox, a "POWERED BY CLAIRE™" logo, and "OK" and "Cancel" buttons.
- Task Mapping Panel:** A panel titled "Task Mapping" showing details for a task named "Elastic\_Mapping\_S3\_to\_Redshift\_SmartMeter\_IoT\_large". It includes fields for Name, Location, and Updated Date, and a "Mapping Image" section with a complex data flow diagram involving S3 buckets, functions, and joins.
- Spark Session Properties Table:** A table titled "Spark Session Properties" listing various properties with their current values and tuning recommendations. The table has columns for Session Property Name, Session Property Value, and Tuning Recommendation.

Session Property Name	Session Property Value	Tuning Recommendation
infaspark.sql.forcePersist	false	⚠️ false
spark.driver.maxResultSize	4G	⚠️ 4G
spark.driver.memory	4G	⚠️ 4G
spark.executor.cores	4	⚠️ 4
spark.executor.memory	6G	⚠️ 6G
spark.memory.fraction	0.97	⚠️ 0.97
spark.memory.storageFraction	0.25	⚠️ 0.25
spark.rdd.compress	true	⚠️ true
spark.reducer.maxSizeInFlight	207m	⚠️ 207m
spark.shuffle.file.buffer	78k	⚠️ 78k
spark.sql.adaptive.enabled	true	⚠️ true
spark.sql.autoBroadcastJoinThreshold	-1	⚠️ -1
spark.sql.broadcastTimeout	2000	⚠️ 2000

# CLAIRE Recommendations in CDGC



The image shows two instances of the CLAIRE Activity interface. The left instance displays a list of assets with recommendations, while the right instance shows a detailed view of specific recommendations.

**Assets with Recommendations (57)**

**Filter:** Time Period: 3 Months, Type: Classifications

Name	Asset Type
> FIRST_NAME	Column
▼ NATIONAL_ID	Column
> ACCOUNT	Column
> CITY	Column
> COUNTRY	Column
▼ IP_ADDRESS	Column

**CLAIRE Activity**  
powered by CLAIRE™

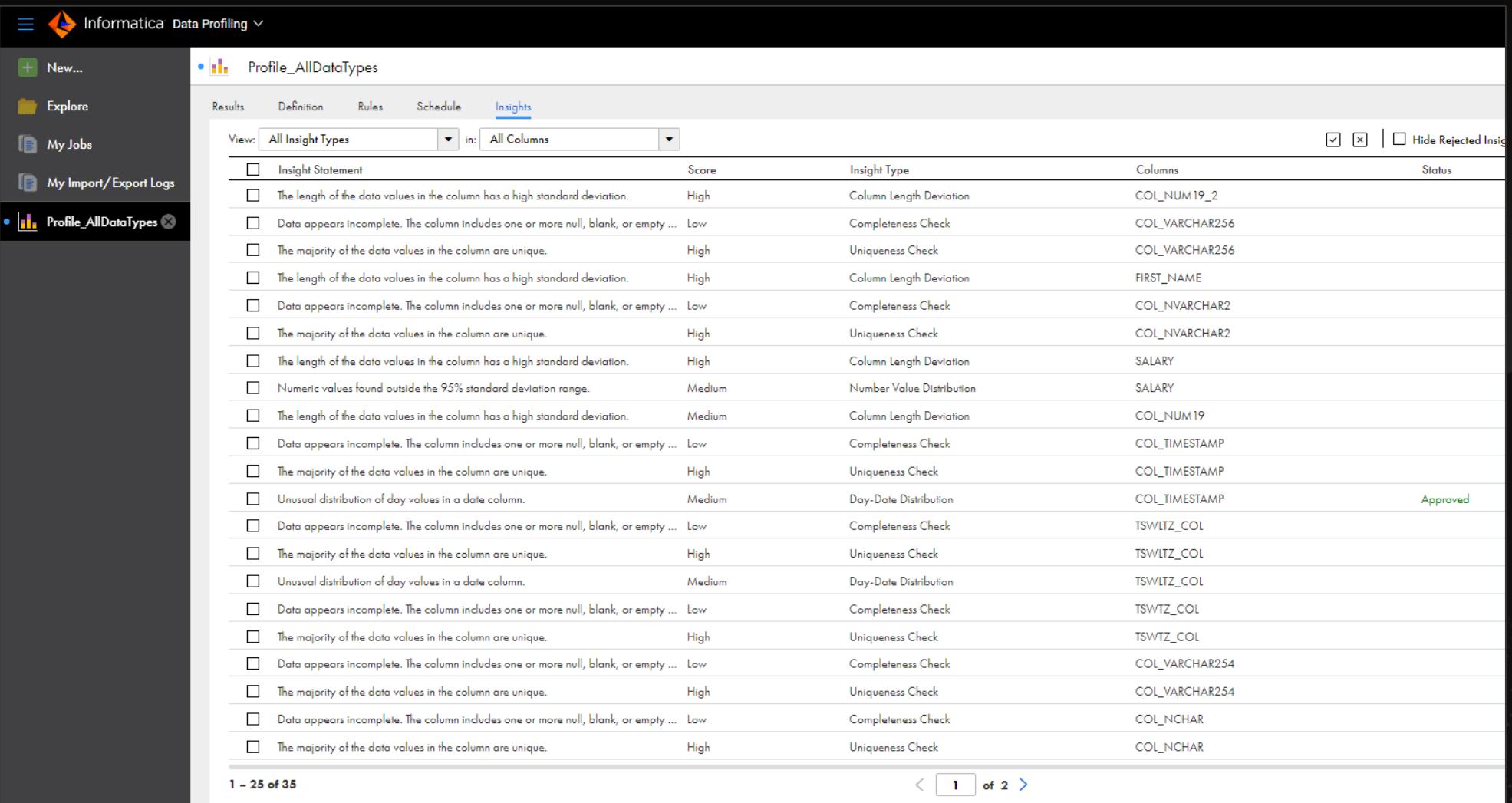
**Assets with Recommendations (57)**

**Filter:** Time Period: 3 Months, Type: Glossary Associations, Status: Pending, Accepted, De...

**Add Filter**

Name	Asset Type	Glossary Associations	Status
> Stock Market	Flat Field	1 total	
> ICD9 Diagnosis Code	Flat Field	1 total	
▼ VISA	Table	1 total	
		Passport	Accepted
▼ IPADDRESS	Column	1 total	
		IP Address	Accepted

# CLAIRE Insights for Profiling Results



The screenshot shows the Informatica Data Profiling interface. The left sidebar includes options for New..., Explore, My Jobs, My Import/Export Logs, and the current profile, Profile\_AllDataTypes. The main area is titled "Profile\_AllDataTypes" and has tabs for Results, Definition, Rules, Schedule, and Insights. The Insights tab is selected, showing a table of profiling results. The table columns are: View, Insight Statement, Score, Insight Type, Columns, and Status. The status column for the last row shows "Approved". The table lists 25 rows of insights, mostly for columns like COL\_NUM19\_2, COL\_VARCAH256, FIRST\_NAME, etc., with various scores and types like Column Length Deviation, Completeness Check, and Uniqueness Check.

View:	All Insight Types	in:	All Columns			
<input type="checkbox"/>	Insight Statement	Score	Insight Type	Columns	Status	
<input type="checkbox"/>	The length of the data values in the column has a high standard deviation.	High	Column Length Deviation	COL_NUM19_2		
<input type="checkbox"/>	Data appears incomplete. The column includes one or more null, blank, or empty ...	Low	Completeness Check	COL_VARCAH256		
<input type="checkbox"/>	The majority of the data values in the column are unique.	High	Uniqueness Check	COL_VARCAH256		
<input type="checkbox"/>	The length of the data values in the column has a high standard deviation.	High	Column Length Deviation	FIRST_NAME		
<input type="checkbox"/>	Data appears incomplete. The column includes one or more null, blank, or empty ...	Low	Completeness Check	COL_NVARCHAR2		
<input type="checkbox"/>	The majority of the data values in the column are unique.	High	Uniqueness Check	COL_NVARCHAR2		
<input type="checkbox"/>	The length of the data values in the column has a high standard deviation.	High	Column Length Deviation	SALARY		
<input type="checkbox"/>	Numeric values found outside the 95% standard deviation range.	Medium	Number Value Distribution	SALARY		
<input type="checkbox"/>	The length of the data values in the column has a high standard deviation.	Medium	Column Length Deviation	COL_NUM19		
<input type="checkbox"/>	Data appears incomplete. The column includes one or more null, blank, or empty ...	Low	Completeness Check	COL_TIMESTAMP		
<input type="checkbox"/>	The majority of the data values in the column are unique.	High	Uniqueness Check	COL_TIMESTAMP		
<input type="checkbox"/>	Unusual distribution of day values in a date column.	Medium	Day-Date Distribution	COL_TIMESTAMP	Approved	
<input type="checkbox"/>	Data appears incomplete. The column includes one or more null, blank, or empty ...	Low	Completeness Check	TSQLTZ_COL		
<input type="checkbox"/>	The majority of the data values in the column are unique.	High	Uniqueness Check	TSQLTZ_COL		
<input type="checkbox"/>	Unusual distribution of day values in a date column.	Medium	Day-Date Distribution	TSQLTZ_COL		
<input type="checkbox"/>	Data appears incomplete. The column includes one or more null, blank, or empty ...	Low	Completeness Check	TSQLTZ_COL		
<input type="checkbox"/>	The majority of the data values in the column are unique.	High	Uniqueness Check	TSQLTZ_COL		
<input type="checkbox"/>	Data appears incomplete. The column includes one or more null, blank, or empty ...	Low	Completeness Check	COL_VARCAH254		
<input type="checkbox"/>	The majority of the data values in the column are unique.	High	Uniqueness Check	COL_VARCAH254		
<input type="checkbox"/>	Data appears incomplete. The column includes one or more null, blank, or empty ...	Low	Completeness Check	COL_NCHAR		
<input type="checkbox"/>	The majority of the data values in the column are unique.	High	Uniqueness Check	COL_NCHAR		

1 - 25 of 35 < 1 of 2 >



- Automate the discovery of potential data problems by analyzing profiling results
- Results presented as Insights
- User acceptance of Insights automatically creates Data Quality Rules and assigns to profiling for monitoring

# CLAIRE ML-Model for Matching in MDM

Business 360 Console ▾

 Person > Baseline Match Model for person Deduplication

Model Configuration Declarative Rules Machine Learning Model

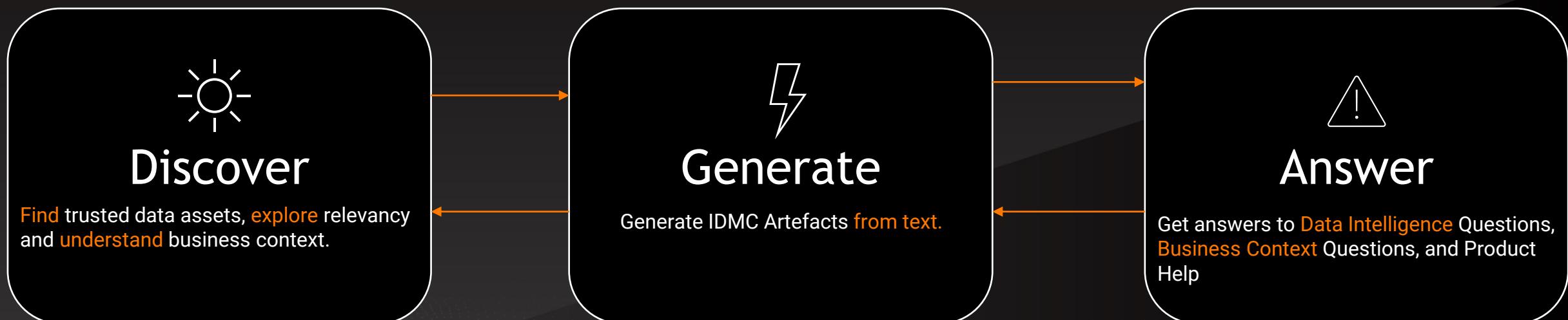
## Training the Machine Learning Model

The match model is published. To create a version of the published model and start training the machine learning model, click Start Training.

### ▼ Match Fields (12)

Field Name	Field Path	Internal ID	Used in
Full Name		fullName	Candidate Selection, Declarative Rules, Training
Alternate Identifier Type	AlternateIdentifier	alternateIdentifierType	Declarative Rules, Training
Alternate Identifier Value	AlternateIdentifier	alternateIdentifierValue	Declarative Rules, Training
Address Line 1	PostalAddress	addressLine1	Declarative Rules, Training
Address Line 2	PostalAddress	addressLine2	Declarative Rules, Training
Postal Code	PostalAddress	postalCode	Declarative Rules, Training

A look ahead: Use the power of IDMC and Large Language Models,  
to provide a next generation experience for data management



# IDMC Pricing Model NEWS

Kilian Ingelfinger · Sr Solutions Consultant  
2023

# Where data comes to



# Learnings From Current IPU Model

## 1 Monthly Use-it-or-lose-it

## 2 Overage Protection

- Initial nervousness to commit to monthly use-it-or-lose it
- Seasonal volatility, concern over compliance invoices
- Need to pitch overage protection, complicates sales cycle
- Perceived as inflexible

- Overage protection language does not address all customer concerns for customers who want to ensure that they remain in 100% compliance

# Introducing

# Flex IPU

to overcome these challenges

## Where data comes to



# What is Different?

1

**12-month  
use-it-or-lose it**

*Higher usage flexibility*

2

**Competitive  
overage charge**

*Create incentive for  
expansion (and deterrent  
for overage)*

# Our new offering

Both IPU and Flex IPU will be offered to customers to meet varying needs

	IPU	Flex IPU
<b>Target Use Case</b>	Customer has <b>predictable and consistent usage</b> patterns	Customer has <b>seasonal or inconsistent usage</b> patterns
<b>IPU Usage</b>	<b>Monthly use-or-lose-it</b>	<b>Annual use-or-lose-it</b>
<b>Invoicing</b>	Annual, up-front	Annual, up-front
<b>Overage Description</b>	Overage Protection	Overage <b>billed monthly in arrears</b> . 25% premium over contracted IPU price
<b>Customer Usage Notifications</b>	Platform notifications at 50%, 75%, 90%, and 100% IPU usage	Platform notifications at 50%, 75%, 90%, and 100% IPU usage
<b>If Overage: License Compliance Needed</b>	Sometimes	No (automatic invoice sent for each overage month)
<b>Compensation</b>	Overage: N/A Expansion: Yes	Overage: No Expansion: Yes

## What's new in IDMC

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Global Technical Sales Team  
2023

# Where data comes to



# Cloud Data Integration Innovation: 2022

	H1	H2
Cross-Product Experience (CPX)	<ul style="list-style-type: none"><li>DTM 10.2 upgrade for CDI/CDQ</li><li>Mid-stream preview for mapplets</li><li>DQ/Profiling Serverless</li><li>Adv Serverless cost/perf improvements</li></ul>	<ul style="list-style-type: none"><li>Uber Taskflow orchestration for 3rd party ETL services – Glue, ADF, DBT Core</li></ul>
Product-led Growth(PLG)	<ul style="list-style-type: none"><li>Data Loader native integration with GBQ and Redshift</li><li>Interactive design time experience w/ APDO queries</li></ul>	<ul style="list-style-type: none"><li>Data Loader GA in all ecosystems</li><li>In product videos</li></ul>
CLaire	<ul style="list-style-type: none"><li>CLaire recommendation for UDFs and expressions</li></ul>	<ul style="list-style-type: none"><li>Auto-completion of functions and target recommendations</li><li>Auto Tuning for runtime</li></ul>
Observability (Telemetry)	<ul style="list-style-type: none"><li>Detailed job-level consumption reports</li><li>Opsinsight in all PODs</li></ul>	<ul style="list-style-type: none"><li>Industry Services &amp; Cloud Data Validation metering</li><li>Rules-based alerts</li></ul>
Core Innovation		<ul style="list-style-type: none"><li>FinOps-powered Advanced Data Integration GA</li><li>Private Link support for AWS</li><li>ModelServe Public Preview</li><li>INFACore Public Preview</li><li>OCI connectivity- ADB, oracle object store</li></ul>

# Cloud Application Integration Innovation: 2022

Cross-  
Product  
Experience  
(CPX)

H1

- Data Marketplace Connector

H2

- APIM 3<sup>rd</sup> Party APIs
- APIC Preview

Product-led  
Growth  
(PLG)

- CAI/APIM Logging Enhancements

- CAI Serverless Improvements (K8)

CLaire

- APIM – Privacy Policy: Automatic PII/PCI Detection

Observability  
(Telemetry)

- Improved Cloud to Agent communications
- APIM user-based Rate Limit

- Private Link Support
- APIM & CIH GCP

Core  
Innovation

- APIM Micro-Gateway
- APIM Group Level Policies
- OpenAPI API 3.0 Support

- Data Access Service Connector
- BYODB Secure Agent
- Performance Improvements

# Cloud Data Modernization Innovation: 2022

H1

H2

- Assessment 2.0 production rollout
- Bulk Asset updates - Mapping, MCT, Taskflow
- Object specific repointing
- Parameter files, assignment tasks support
- Cloud Data Validation - Alpha

- Migration Factory/ Tooling for partners
- SAP HANA, SAP Static ABAP, Oracle DBCS, ADB support, ADLS Gen2
- Orchestration: Taskflow Timer, Command Task
- **Data Validation Beta:** Sampling, Data Preview, Import/Export
- Port level assessment Flags
- API support for Post Processing updates

Tooling

- Design: Flat file source/lookup static metadata
- **Real time support for CDC** (clean stop etc.)
- **Operations:** Monitor Target stats, Sub-taskflow hierarchy view, Resume suspended taskflow API
- GBQ Concurrent runs
- ODBC Subtype for Sybase IQ
- **Teradata PDO additional functions**
- PWX Batch: Seq File
- **PWX CDC:** Adabas, IMS, SAP S4/Hana, Db2z, Db2-UDB, VSAM
- **Performance & Scale:** Snowflake & GBQ write updates

- Design: Maplet preview, 'Default value'
- **Error handling** - Fail/Suspend parent for Subtaskflow failure
- **Operations** -Start Workflow from Task - Monitor use-case
- GBQ custom dataset, **retry support, separate billing project, cross project PDO, update handling**, lookup non-equality op
- **APDO:** native filter for GBQ source, Snowflake updates
- **PWX Batch:** Db2z, Db2i, IMS
- **PWX CDC:** Db2i, IMS, MySQL, Oracle, HANA, SQL Server, Postgres
- **Performance & Scale:** Redshift and Azure Synapse writes, GBQ/Redshift/Azure reads, SQL Server PDO, Db2 (LUW)

CDI

+  
Connectivity

# Industry Cloud Innovation: 2022

**Direction:** Enrich IDMC by offering industry-specific solutions and capabilities to improve relevancy, faster adoption and better integrated experience.

**Capabilities:** Pre-built Industry specific Data Services and Accelerators (Healthcare: HL7, FHIR, Retail: EDI, FSI: NACHA, SWIFT)

..... 2022 .....

## Healthcare

- Data services for HL7 2.x, HIPAA
- Healthcare extension for Customer 360

## Financial Services

- Insurance extension for Customer 360

## Retail

- ProductsUp Integration for Retail
- GDSN Certification 3.1.19

## Life Sciences

- Life Sciences extension for Customer 360

## Innovation for all Verticals

- New meter for Industry Solutions
- Data Services transformation in CDI
- Data services repository management

# Platform Innovation: 2022

## Core Platform

Cross-Product  
Experience  
(CPX)

### H1

- Data Loader Connection Wizard
- Improved Onboarding Experience

### H2

- Cross-region IDMC Org Linking
- FedRAMP Certification
- AWS Private Link
- POD WAF Deployment

Product-led  
Growth  
(PLG)

- Self-service Org Provisioning
- Additional Production ORGs
- Threshold Alerts

Observability  
(Telemetry)

- DaaS GPV, DQ/CDQ/CDQ-E Serverless, APIM Meters

- CDV, MDM, Model Serve, and Industry Meters

Core  
Innovation

- TLS 1.2 Support
- Permission & Asset Creation API

- SAML Role/Group mapping
- Update Roles/Group of User(s)
- Set RTE Service Configurations

# Cloud Data Marketplace Highlights 2022

## Collaboration

- Contextual chat
- Ratings
- Portfolio Page



## Automation

- CDGC Integration
- Public APIs
- Approval Automation



## Pick up and use (no training)

- Embedded Guide
- Highlight New
- Jumbo Tooltips



The screenshot displays the Informatica Data Marketplace interface. At the top, there's a navigation bar with 'Workday Data sharing' and 'CDMPOA' tabs, along with a 'Previewing look and feel' button. Below the navigation, there are two main sections: 'Customer Overview' and 'Fleet DOE'.

**Customer Overview:** This section shows a summary of customer data collection. It includes fields for Name (Fleet DOE), Purpose (An open-access journal publishing rigorously reviewed research from across the nation), Status (Published), Data Owners (Owen Jones), Technical Owners (Nick Lester, Pat Anderson), Category (Fleet), Certified Use (Marketing), and Default Delivery (Managed Services API Gateway as XML via API, Location: IICS Managed Services API Gateway).

**Fleet DOE:** This section provides a detailed view of the 'Fleet DOE' collection. It shows a rating of 3.4 based on 4 Analytics, 35 Marketing, and 12 Not specified reviews. It also highlights 'Non certified use'. Below the rating, there are sections for 'DATA QUALITY PER ASSET' showing 75% Google Ad Report and 66% Google Ad Repo. On the right side of the 'Fleet DOE' card, there are several user comments and ratings, such as 'Mohinder Panjal' (Data Analyst) rating 4 stars, 'Sam Smith' (Data Analyst) rating 5 stars, and multiple 5-star ratings from 'Sam Smith' and 'Sam Smith' (Data Analyst).

# CDGC Highlights 2022

## New Interface Evolution

- CFCN VX
- Relationship Views
- Customizable Dashboard
- Search Evolution



## Scanner Expansion

- 40+ Scanners
- Custom Scanner



## CLAIRE Activity

- Insight and management of IGA and Classification



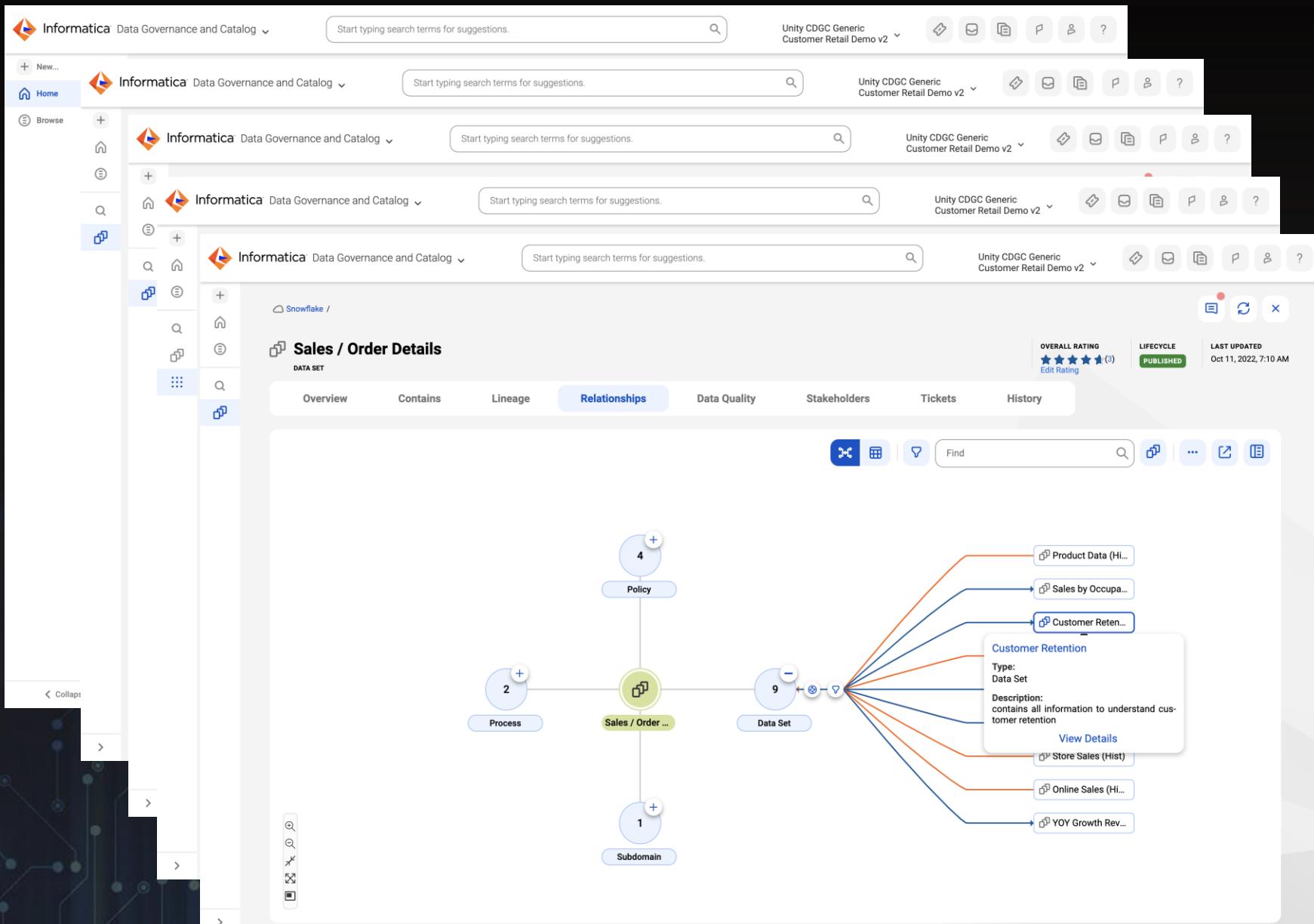
## CDGC and CMDP WW Rollout

- NA, EMEA, ANZ, UK



## Deep field collaboration

- Feedback
- Early Access
- Requirements



# Data Quality Highlights 2022

## Data Quality Insights

- 18 Algorithms
- Auto Rule Generation



## Exception Management

- Simple Setup
- Rule Integration
- Secure Store and report



## DQ Modernization

- DQ in PowerCenter
- DQ Stand-Alone



## CDQ on all PODs and all Eco-Systems

- NA, EMEA, ANZ, UK PODs

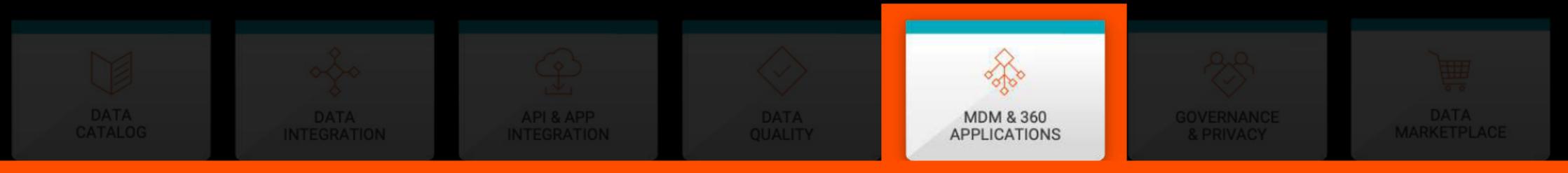


The screenshot shows the Informatica Data Profiling application interface. On the left, there is a navigation sidebar with various icons and sections like 'Data Quality', 'Explore', 'My Jobs', and 'pt\_ExceptionTask'. The main area displays a 'New Exception Task' dialog box. The dialog has three tabs: 'Add Details' (selected), 'Select Rules', and 'Confirm'. Under 'Task Details', it says 'All Rules (Selected 2 of 2)'. A table lists two selected rules:

Name	Description	Location	Type	Input(s)
rs_CheckContact		ExceptionManagement	Rule Specification	Phone, SSN, Email
rs_CheckSSNFormat		ExceptionManagement	Rule Specification	SSN

At the bottom of the dialog are buttons for 'Back', 'Next >', 'Create', and 'Cancel'.

# MDM SaaS Innovation: 2022



## Cross-Product Experience

- Common Agents
  - IDMC Scanner for Business 360
  - Data Prep Preview

- Full Batch support for ingress/ egress & advanced validations utilizing DI and DQ in Ref360

- 200+ Pre-built Data Classifications
- Classification and Policy Writebacks for Snowflake

- Any Domain Pricing
- In product announcements

- Data Element Classifications
- Intelligent Glossary Associations
- Data Entity Classifications

- Identity Matching

- Telemetry and COGS – user-based stats collection
- Advanced Telemetry Dashboards

- Visualization of jobs steps
- Download match results with greater detail
- Reset matched records for repeat tests

- Scanner PAM Ecosystem, Salesforce, Marketo, QlikView, MS Dynamics CRM, SSRS
- Incremental Processing Support
- Custom Scanner Support

- Multi-domain MDM at scale with support for Product Mastering and Supplier Mastering

## Observability

- Scanner PAM Ecosystem, Salesforce, Marketo, QlikView, MS Dynamics CRM, SSRS
- Incremental Processing Support
- Custom Scanner Support

- Download match results with greater detail
- Reset matched records for repeat tests
- FinOps-powered Advanced Data Integration Private Link support for AWS
- ModelServe Preview
- Performance Improvements

## Core Innovation

### H1

- DQ & ML Enhancements
  - Adv Serverless cost/perf enhancements
  - Uber Taskflow orchestration for Data Quality

### API & APP INTEGRATION

- Data Loader native integration with GBQ and Redshift
- Interactive design time experience w/ APDO queries
- Data Loader in all ecosystems

- CAI/API Management Logging Enhancements
- CAI Serverless improvements (K8)

### DATA QUALITY

- User Experience
  - Maplet Profiling Support

- Data Quality Support across ecosystems and execution models
- Core Data Quality Bundle
- Data Quality Modernization Support
- Exception Management Capabilities
- NA Data Quality Bundle
- Classic Matching DQ Bundle

- Data Quality Insights – Base Algorithms
- Data Quality Insights – Pattern Variations and Timeseries support

- Improved Cloud to Agent communications
- API Management user-based rate limit capabilities
- Private Link Support
- API Management & CIH GCP

- Profile Storage Meter Simplification
- Telemetry and COGS – user-based stats collection
- Private Link Support

- Multi-Instance Cleansing
- Address Verification Enrichments and Certified mode support
- Rule Specification support for full Expressions

- Data Access Service Connector
- BYODB Secure Agent
- Performance Improvements

- Cataloging of master data and lineage in Cloud Data Governance and Catalog with MDM scanner

- Intuitive & Simple Reference Data Lifecycle
- Simplified onboarding of new domains

### Product Matching

- View key metrics per step for ingress, egress and generate search index jobs
- Consumption Insights for records and entitlement

- Ecosystem expansion with support for MDM SaaS in Azure

### H2

- CPDNVVA Review and Updates
- Data Quality Overlay on Lineage Views
- Aligned Visual Interface for MDM & 360 Applications

- Updated Preview pane with additional information including DQ Scores
- Automatic Assignment of Business Names
- Collaboration Features – Discussion Threads, Ratings & Notifications
- Simplified Search Experience and Navigation

- Updated NLP Rule Generation Algorithms
- Intelligent associations - business items to tech assets
- Dedicated CLAIRE Activity Dashboard

- Increased telemetry with updated backend services
- Feature Level Telemetry support
- Advanced Internal Telemetry Dashboards
- Tenant Provisioning Automation

- Marketplace-level Data Publication & Order Activity Metrics
- Collection Level Metrics (min-metrics)
- Visualize User Profile with Statistics and Usage

- Public API Support for Publication Activities
- Field Groups for Business Entities
- Entity Match Details Support
- Order Support for Order Activities
- Faceted Consumption Search Parameters

# Agenda - DAY 3

DAY 2  
Recap

MDM & 360  
Applications

What's New in  
IDMC

What's Next?

# What's Next?

Where data comes to



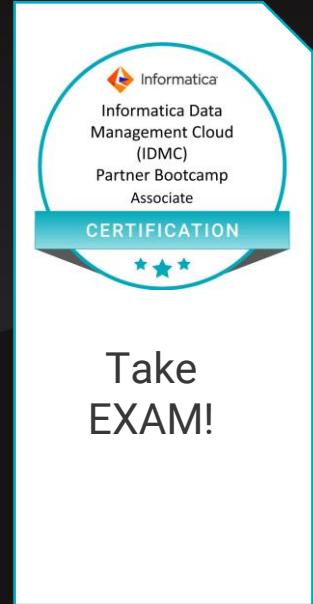
# IDMC Associate Bootcamp Setup

*A single-stop, comprehensive program to serve all level of learning needs!*

DAY 1

DAY 2

DAY 3



Take  
EXAM!

Enroll to Hands-On Cloud Data Integration Course

# IDMC Associate Bootcamp Quiz

## Key Facts

- You will have 30 questions.
- You will need to answer 80% of the questions to pass.
- You will get two attempts.
- The link to access the exam will appear on the ON 24 page.
- YOU NEED PARC CREDENTIALS TO ACCESS EXAM



# IMPORTANT : Action Required!

IICS : Cloud Data Integration Services Course!

This course is **MANDATORY** to achieve Data Integration hands on experience!

Register TODAY!

It's FREE of Charge!

The screenshot shows a course landing page for 'IICS: Cloud Data Integration Services'. The page has a dark header with the course title and a 'ENROLL NOW' button. Below the header is a large image of a woman in a business suit using a laptop outdoors. The main content area includes a 'Course Overview' section with a detailed description of the course objectives and a note about required equipment. To the right, there is a 'Questions?' form with fields for work email, first name, last name, and organization name.

**IICS: Cloud Data Integration Services**

onDemand | Cloud / iPaas | Self-Paced | Release 41

**ENROLL NOW**

**Course Overview**

This course is applicable to Release 41. Learn the fundamentals of Informatica Intelligent Cloud Services (IICS) including the architecture and data integration features, synchronization tasks, cloud mapping designer, masking tasks, and replication tasks. This course enables you to operate and manage user security, secure agents, and monitor tasks and resources in IICS.

**Important note regarding this onDemand course:** Many students will need their personal laptop/PC to set up the lab environment and perform lab exercises. Laptops provided by your employer may not allow downloading external tools. To execute labs in full, students need to download and install the following tools. See Agenda below to view more.

**Questions?**

Work Email  
First Name  
Last Name  
Organization Name

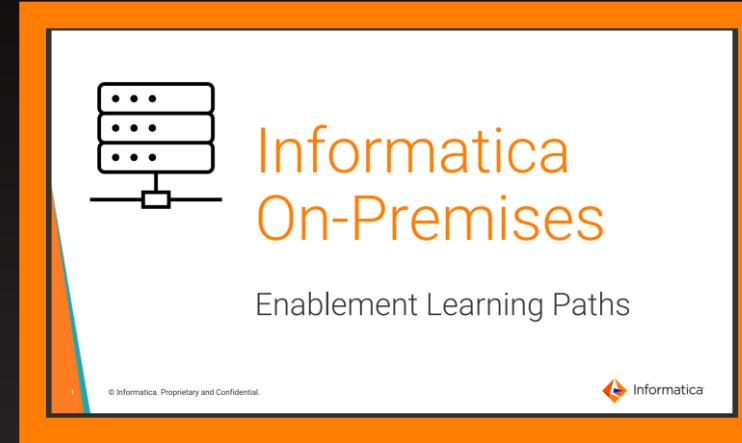
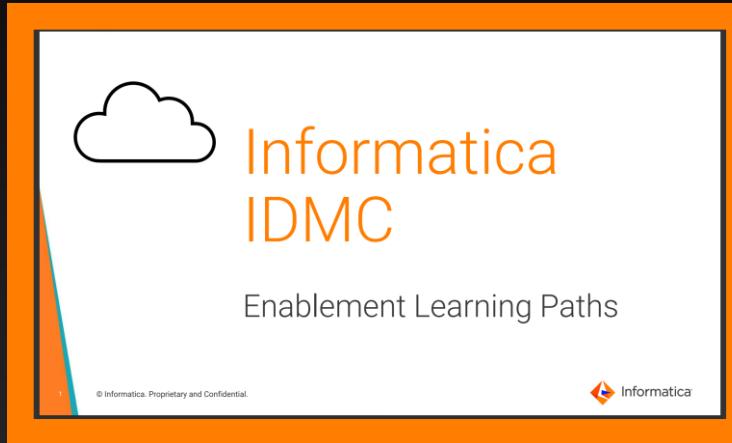
# Further Enablement

The screenshot shows the Informatica Partner Program website interface. At the top, there is a navigation bar with the Informatica logo, "Partner Program", "Infa Partner | Log Out", a search bar with a magnifying glass icon, and a "Training" tab which is highlighted with an orange border. Below the navigation bar, there are links for "Onboarding", "Training", "Selling", "Marketing", "Products", and "Dashboards & Deals". The main content area features a large image of a person from behind, wearing a suit jacket and a striped shirt. Overlaid on the left side of this image is a white box containing the text "Partner Learning Paths" in bold black font, also enclosed in an orange border. Below this box, the text "On-Prem Learning Path" is displayed in orange. To the right of the main image, another white box contains the text "Cloud Learning Path" in orange, also enclosed in an orange border.

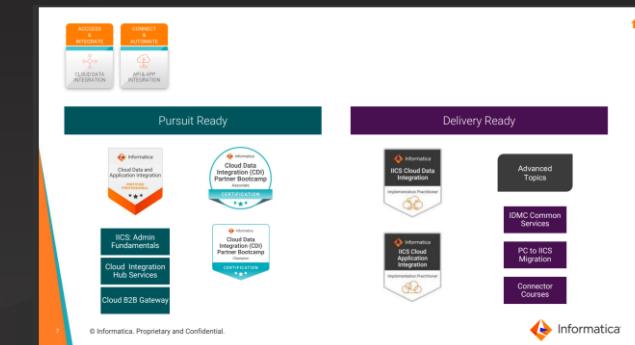
# Learning Assets

New Learning Paths announced at SKO!

No more Journey based Learning Paths!

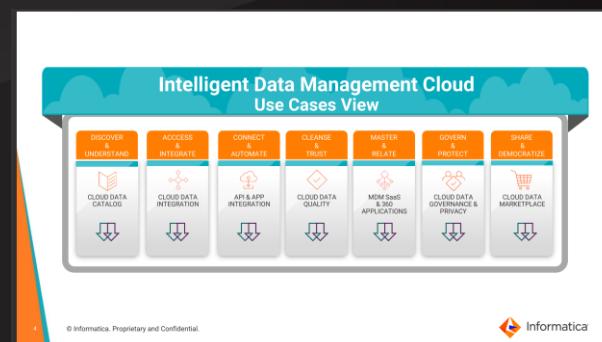


Based on Role

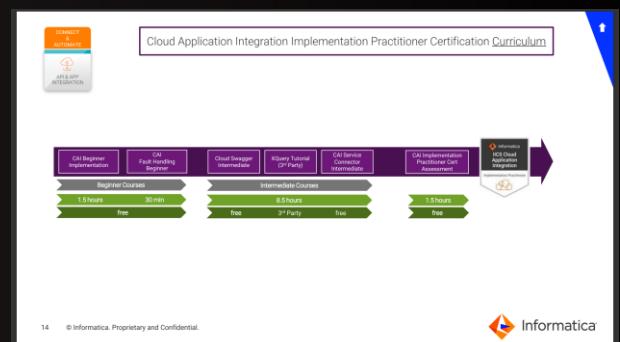


Refreshed graphics and usability

Toolbox



Step by Step, Live links, duration,..



# Keep an Eye Out...

Other Segments of the IDMC Bootcamp:

- IDMC Foundation
- IDMC Champion

Where will you start?

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# Where data comes to

