14 Dec 2022

Meet the Experts:
What's New in Multidomain MDM & 360 Applications

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Redefining Modern Cloud-Native MDM

MDM SaaS & 360 SaaS Applications

1. Introductions & Overview
2. Data Stewardship Capabilities & Demo
3. Implementation Capabilities & Demo
4. Reference 360 & Demo
5. MDM Extensions
6. What's Next

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Today's Speakers

John Thomas

Sr. Director, Product Management

Oliver Soans

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Sr. Manager, Product Management

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Multidomain MDM SaaS

John Thomas, Sr. Director, Product Management
Oliver Soans, Director, Product Management
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Bejoy Jacob, Sr. Manager Product Management

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Pillars of Modern Master Data Management

1. Multidomain
2. All-In-One Application
3. AI Powered, Contextual
4. Adaptive Governance
5. Cloud-Native & Consumption Based

Intelligent MDM SaaS

Extensible Preconfigured Domain and Industry Content with Custom Domain Capabilities

- Customer 360
- Reference 360
- Finance 360
- Supplier 360
- Product 360
- Industry Extensions
- Custom Domains

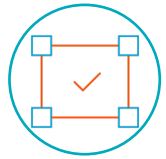
ALL-IN-ONE CAPABILITIES

Discovery, Profiling, Catalog

Model Master & Reference Data

Hierarchies & Graph Relationships

Data & Application Integration, APIs, Syndication



Cleansing, Enrichment, Match & Merge

Task Management & Workflow

Stewardship, Governance, & Security

Dashboards, Reporting, Marketplace

CLAIRE®
AI and ML guided

Connectivity

Connect to all systems containing or needing master data

SCALABLE MICROSERVICES-BASED CLOUD NATIVE ARCHITECTURE

METADATA DRIVEN

NO CODE CONFIGURATION

CONTINUOUS INNOVATION

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Product Innovation Guiding Principles

Simplicity

Remove Complexity

AI-guided Configuration & Monitoring and Packaged Content & Processes

Productivity

10X to 100X Productivity

Data Auto-classification, Self-Service Analytics, Schema Matching and Auto-generated Data Integration

Scale

Cloud First, Cloud Native

Connected Context and Data Management at Enterprise Scale

Modern technology stack:

Cloud-native, microservices-based, API-driven, and multi-cloud

Cloud Native @ Scale	AI Native @ Scale	Multi-Cloud & Multi-Hybrid	No-Code	Security & Trust as Design Principles

Features from recent releases

SIMPLICITY

- Single click activation of Informatica DaaS for address verification for batch
- Easier to find events in history of changes on a Business Entity with new filtering options for record history
- Filtering on graph and hierarchy relationships
- Build custom workflows to support user-driven content enrichment and approval flows across all data domain
- Configure default values and picklists for hierarchy and graph attributes
- Allow users to configure a custom range to filter the values of numeric or date fields that appear as facets on the Search Results page
- Enhanced the search capabilities to be able to Save and retrieve Search results, brought in additional support for wildcard characters

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PRODUCTIVITY

- Enhanced navigation and configuration of relationships and hierarchies
- Point-in-time view of hierarchies
- Ability to quickly add multiple dashboard pages and customize colors and styling of charts
- Efficiently and effectively perform Data Stewardship with manual merges and survivorship overrides
- Cascading and non cascading hierarchy deletes
- Multi-select on search

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SCALE

- Full multidomain capabilities with ability to create custom domains
- Ability to support nested field groups within a business entity
- Support internationalization by translating the labels of MDM SaaS assets into French, German, Japanese, Portuguese, and Spanish
- Batch scheduling of reports and dashboards
- Improved performance for Hierarchy and graph relationships

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DEMO

Features from recent releases

SIMPLICITY

- Choose from a wide range of icons to represent your business entities
- Configure the display fields in business entities
- Read Job Metrics easily for Ingress and Egress Jobs
- Stop a match and merge job that is running

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- Configure relationship attributes
- Improve the match accuracy for data that belong to different populations.
- Create segments based on exact field values to limit matching to the segment data
- Exclude Records from Matching
- Reset the matched records that are not yet merged
- Cloud Data Governance and Catalog Scanner for MDM Metadata
- Use Cloud Application Integration process as a workflow for a user-triggered event
- Customer can grant read-only access for Informatica Global Support

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SCALE

- Publish events from MDM SaaS applications to any Cloud Data Integration target
- Improved data lineage with support to view the merged business IDs of the master records and the original business IDs of their contributing source records in Egress.
- New Public APIs exposed for operational integration with MDM from other applications
  - Search Match API
  - Orchestrate MDM Jobs using APIs
- Enable the last updated date for source records to capture the latest data
- Define a job to permanently delete all data or history of data from MDM SaaS
- Support for internationalization through enabling translated labels for languages

DEMO

Reference 360

Mrityunjay Sharma, Sr. Director, Product Management

Rod Culbreth, Director, Product Management

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DEMO

MDM SaaS Extensions

Mrityunjay Sharma
Sr. Director, Product Management

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MDM SaaS Extensions

Jump start your MDM implementation

Extensions are preconfigured assets that can accelerate and streamline implementations. Delivered as “extension” of the baseline OOTB MDM360 application, they can be further customized to need.

Integration Extensions

- Integration with common Master Data Sources.
- Different integration modes and direction (e.g., batch/real-time, inbound/outbound)

Industry Extensions

- Comprehensive data model, data quality rules and match rules
- Customized, role based, user experience
- Common and industry specific source system integration

Advantages

Accelerate MDM Programs

Improve Business Adoption

Leverage IDMC

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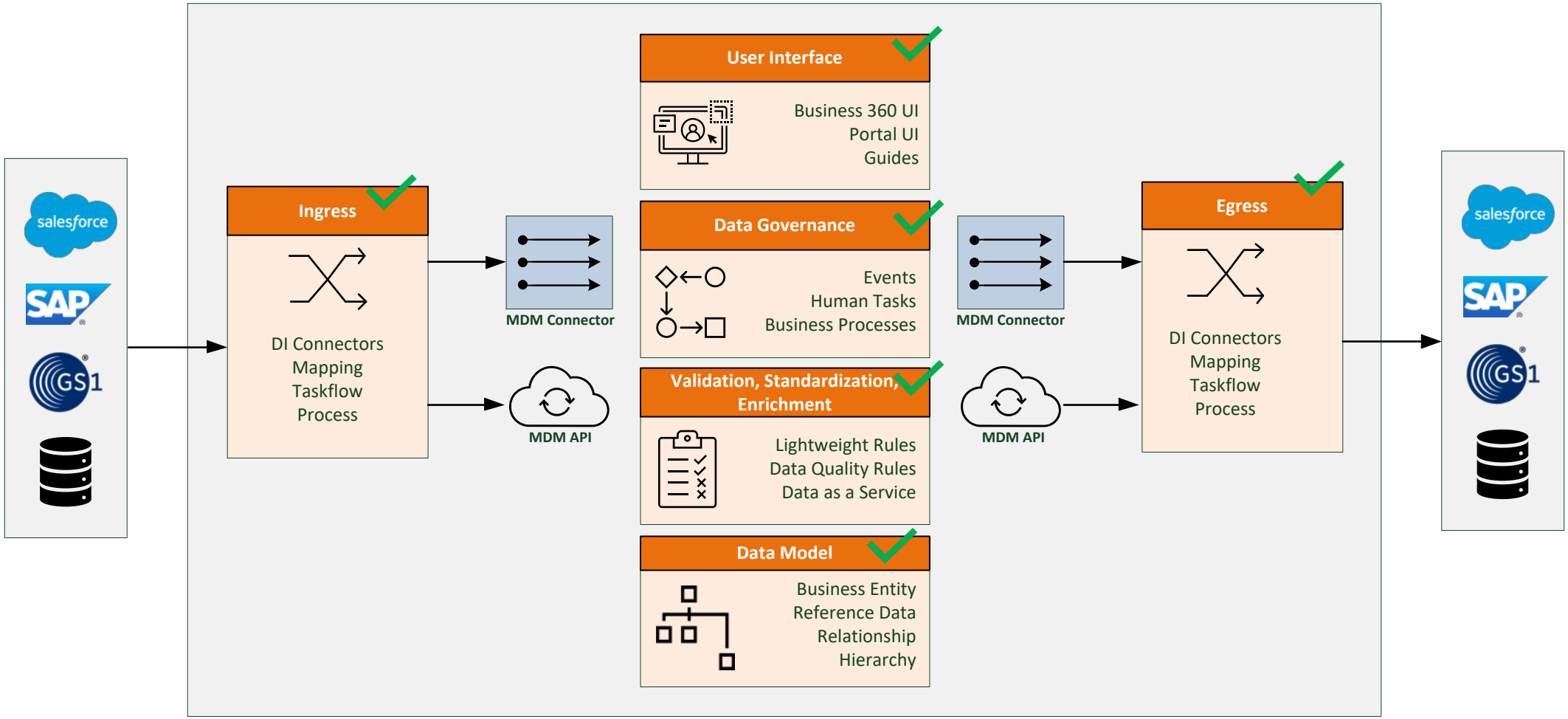
MDM SaaS Extension on Intelligent Data Management Cloud



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MDM SaaS Extensions - 2022

1 Salesforce Extension for Customer360	2 Life Sciences Extension for Customer360	3 SAP Extension for Customer360	4 Healthcare Extension for Customer360	5 Insurance Extension for Customer360
Real-time and batch integration for Salesforce Accounts & Contacts	Master healthcare professionals and healthcare organizations	Batch integration for Salesforce Accounts & Contacts	Master Providers, Members, Patients, Plans	Master Customer, Agreement and Agent
•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	•HCO & HCP mastering •Data Onboarding from NPPES, MedPro & Salesforce •Customer segmentation and targeting •Affiliations management •360° view of HCO & HCP •Custom reports	•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)	•Enterprise view of Healthcare Master Data •Better "Consumer" understanding leading to improved outcomes, engagement and loyalty •Deliver a complete picture of an individual's critical relationships across the healthcare ecosystem •Improved governance and compliance	•Create enterprise view of master data across multiple policy & claim systems •Manage Customer household, total value and life events and identify up-sell/cross-sell opportunity •Deliver complete picture of customer's critical relationships •Manage producer/ agent, associated policies & customer overlap •Improved governance and compliance

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Upcoming new extensions

Dec 2022 – Jan 2023

1 SAP Finance Extensions for Reference 360

Centralized authoring and management of Finance Master Data

- Centralized authoring and management of G/L Account, Cost Center and Profit Center
- Cost Center and Profit Center Hierarchies
- Integration with SAP ECC and S/4 HANA
- Advanced validation rules for Finance Master data

2 Legal Entity Master for Financial Services

Identification, risk assessment of entities to support business processes and compliance

- Industry standard Legal Entity model
  - Support for multiple legal entity identifiers
  - Capture corporate ratings and risks
  - Legal Entity Hierarchy
- Advanced validation rules
- Data enrichment from third party providers
- Custom Match model to master Legal entities
- 360° view of Legal entities with dashboard for reports/analytics

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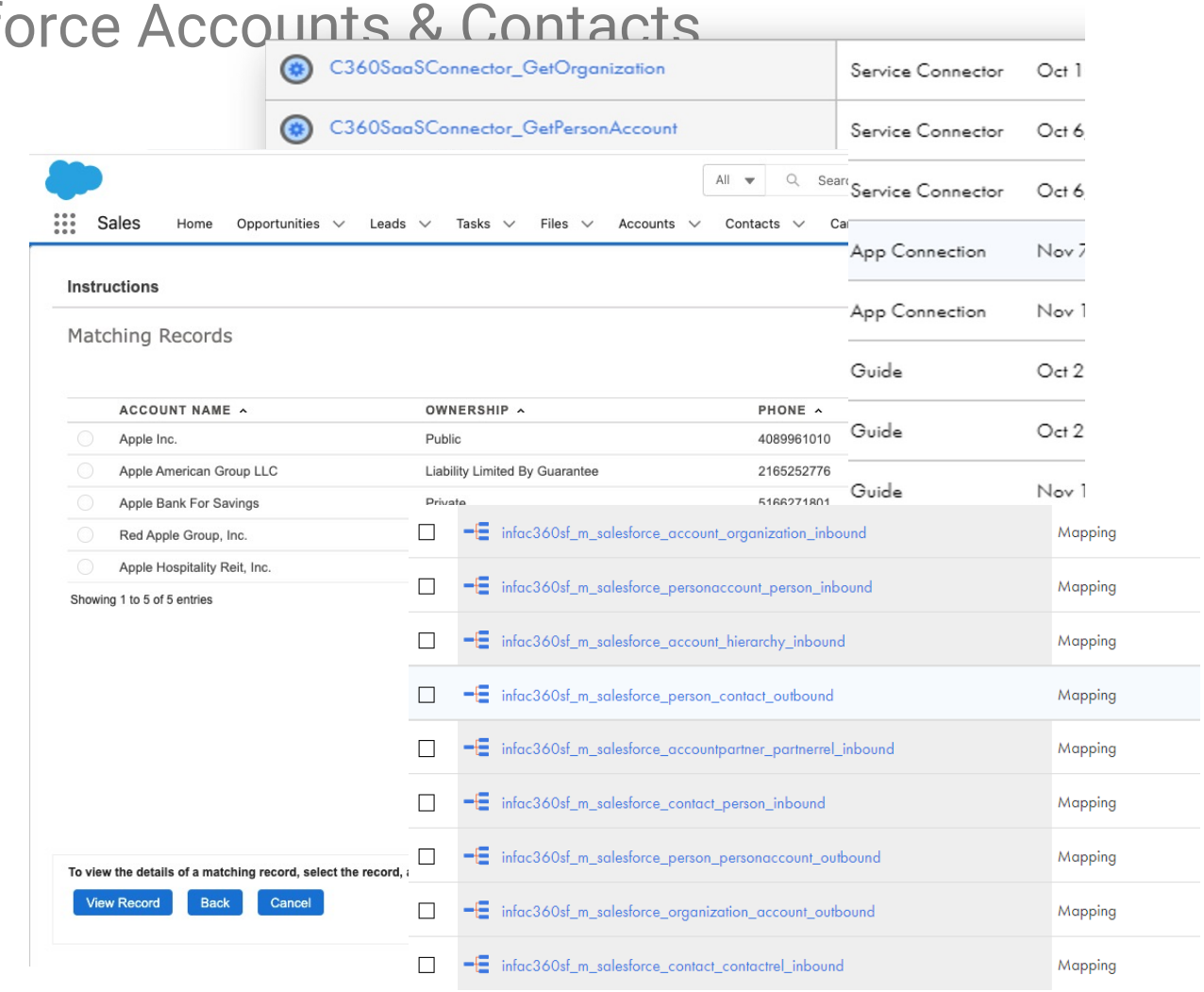
Salesforce extension for Customer360

Real-time and batch integration for Salesforce Accounts & Contacts

- 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



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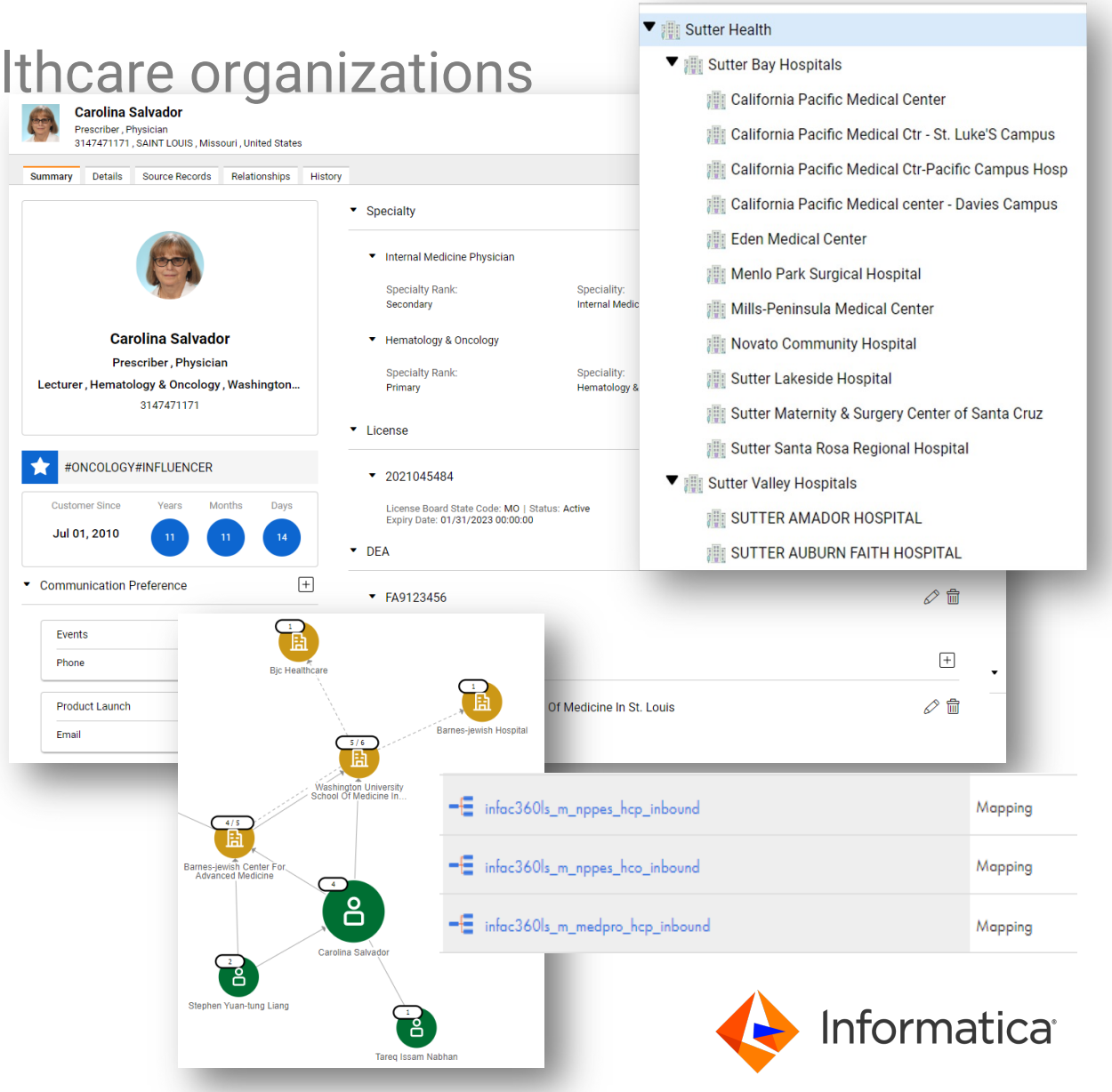
Life Sciences Extension for Customer360

Master healthcare professionals and healthcare organizations

- HCO & HCP mastering
- Data Onboarding from NPPES, MedPro & Salesforce
- Customer segmentation and targeting
- Affiliations Management
- 360º 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



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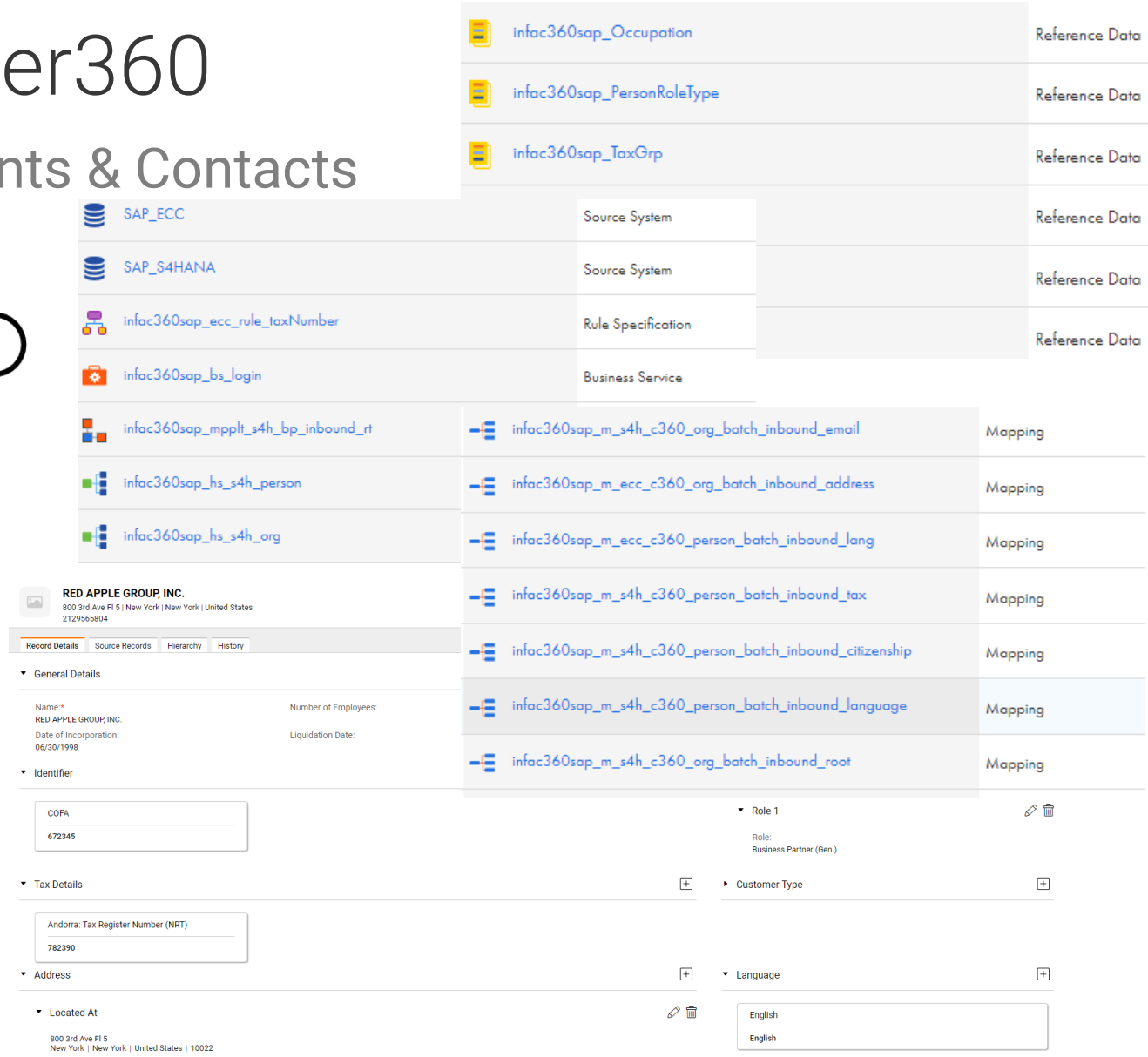
SAP Extension for Customer360

Batch integration for Salesforce Accounts & Contacts

- 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



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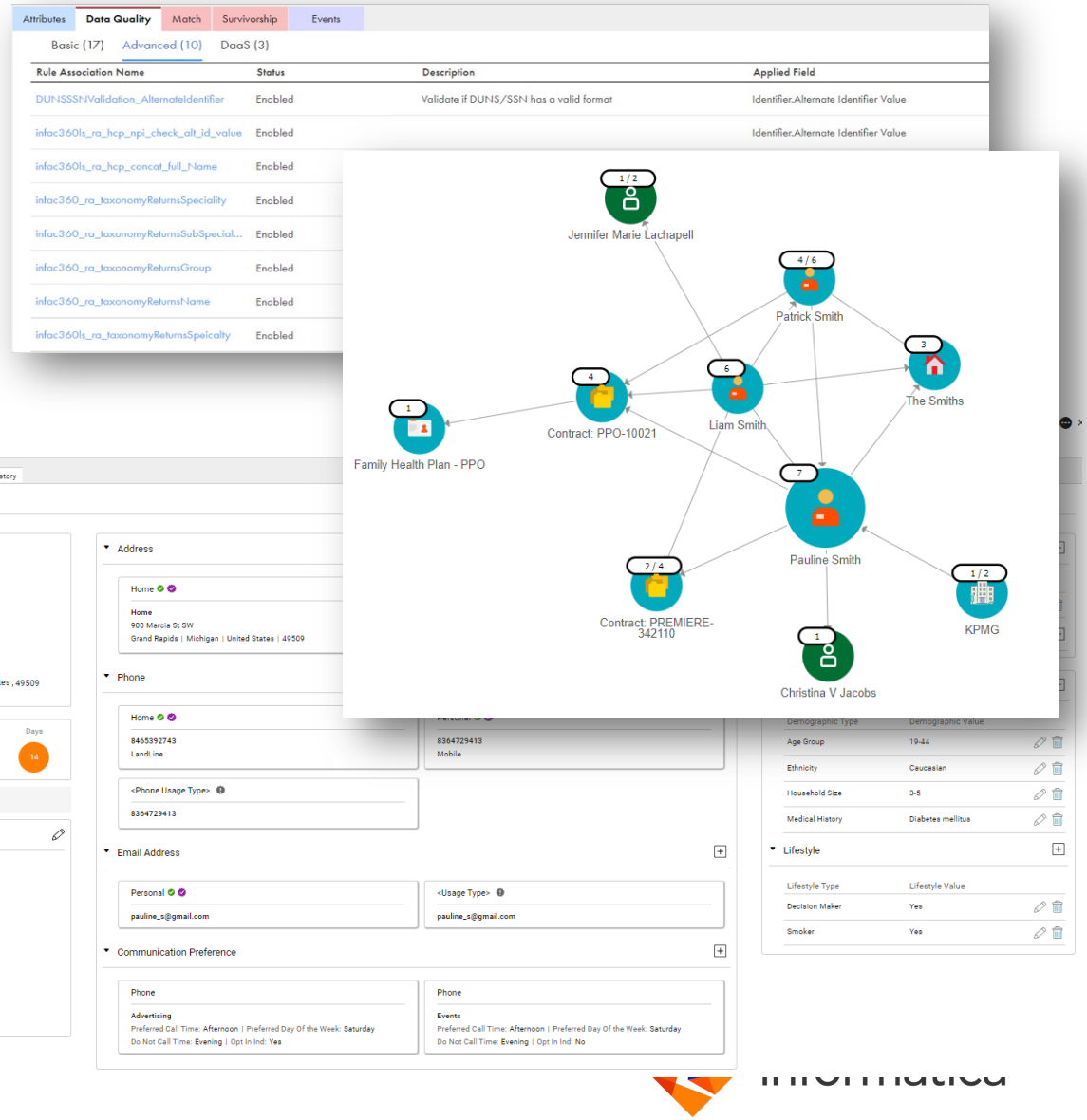
Healthcare Extension for Customer360

Master Providers, Members, Patients, Plans

- Enterprise view of *Healthcare Master Data* such as *members/patients, household, providers, contract, plan*
- Better “Consumer” understanding leading to improved outcomes, engagement and loyalty
- Deliver a complete picture of an individual’s critical relationships across the healthcare ecosystem
- Improved Governance and Compliance



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

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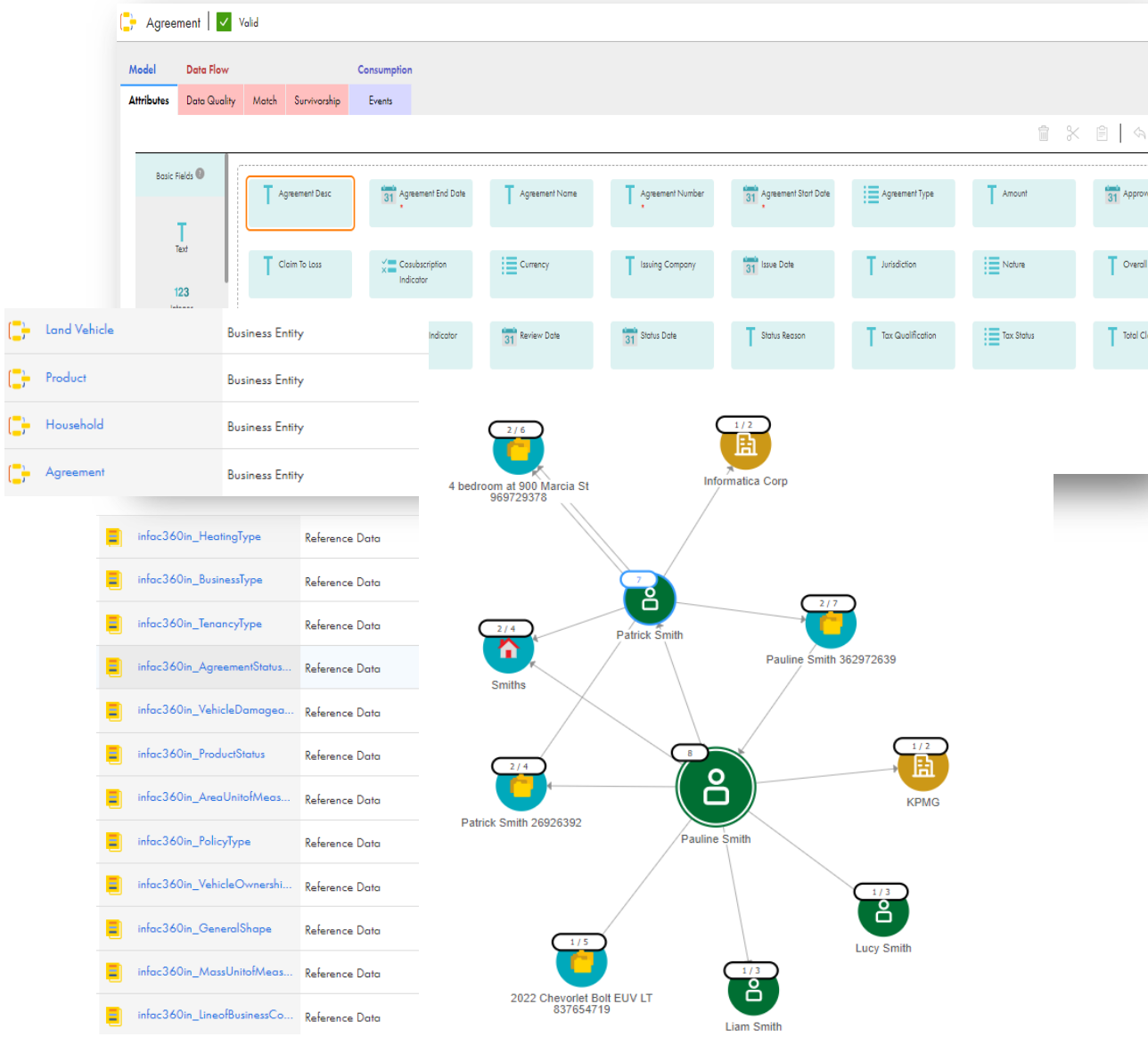
Insurance Extension for Customer360

Master Customer, Agreement and Agent

- Create enterprise view of *Master Data* such as *customer, policy, agent* across multiple Policy & Claim Systems
- Manage Customer household , total value and life events and identify up-sell/cross-sell opportunity
- Deliver a complete picture of a customer's critical relationships
- Manage Producer/Agent, associated policies & customer overlap
- Improved Governance and Compliance (e.g., customer contact preferences, unclaimed life policies)



Key Assets

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

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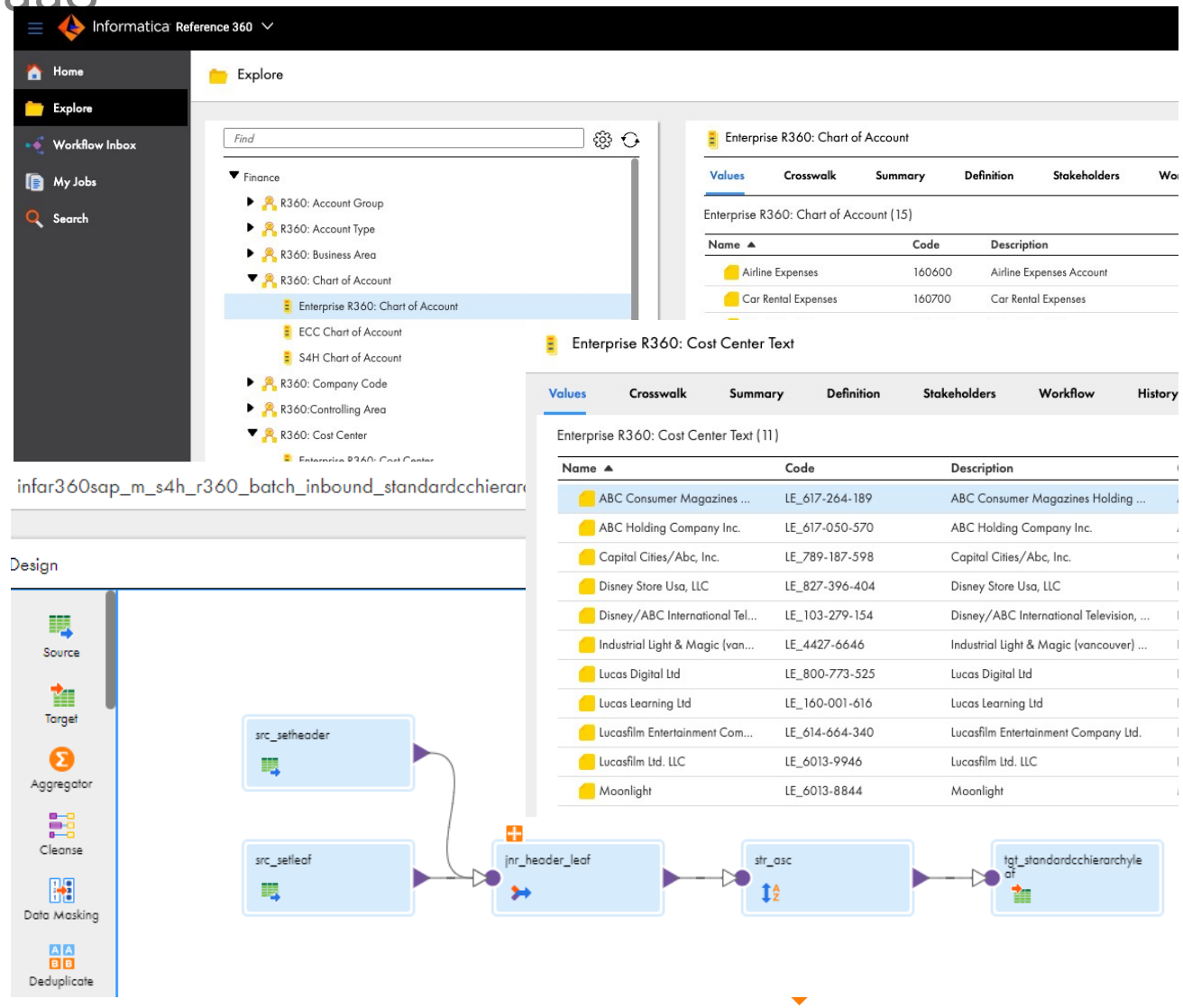
SAP Financial Extension for Reference 360

Manage finance master data on MDM SaaS

- Centralized definition, management and governance of key Finance Master Data Sets such as
  - G/L Accounts & Company Code Extension
  - Cost Centre & Cost Centre Hierarchy
  - Profit Centre and Profit Centre Hierarchy
- Inbound & Outbound integration with SAP S/4 HANA and ECC
- Migration of Finance Master Data from ECC
- Advanced Validation Rules
- Change Approval process

Key Assets

- Data Model for G/L Account, Cost Center on Reference 360
- Data Quality rules for validation and data integrity
- Integration assets for Inbound & Outbound integration with SAP ECC & SAP S/4 HANA



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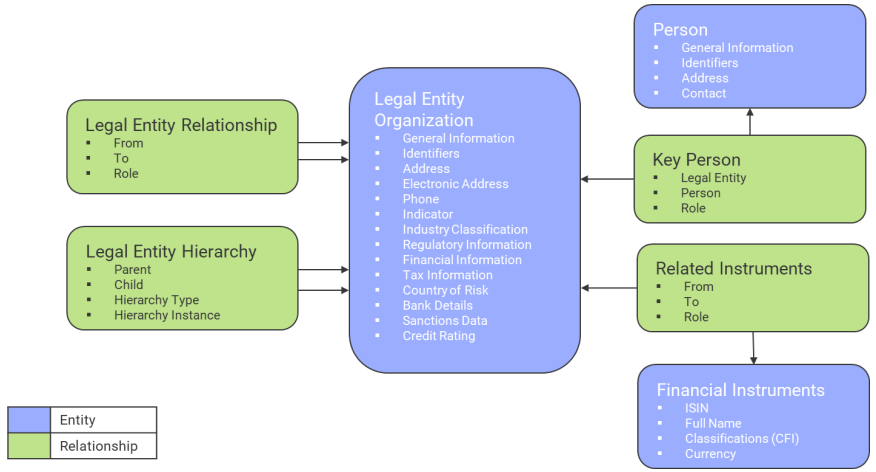
Legal Entity Master for MDM SaaS

Solution for Financial services companies to manage legal entity data

- Identification of Legal Entities
  - Unique, unambiguous and persistent identification of legal entities such as issuer, customer, counterparty
  - Understand corporate structure and nature of the business of entities
- Visibility of Risk Exposure
  - Assessment of risk exposure undertaken by entities
- Regulatory Compliance
  - E.g., Basel III, Solvency II, FATCA, MIFID II
- Support of Key Business Processes such as client on-boarding, KYC compliance, CLM

Key Assets

- Data Model for Legal Entity, Key Person, Instruments
- Legal Entity Hierarchy
- OOTB Rule to verify and enrich key data elements
- Third party enrichment
- Customized UI



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