

14 Dec 2022

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



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

Today's Speakers



John Thomas

Sr. Director, Product Management



Oliver Soans

Director, Product Management



Russell Andrade

Sr. Manager, Product Management



Bejoy Jacob

Sr. Manager, Product Management



Rod Culbreth

Director, Product Management



Mrityunjay Sharma

Sr. Director, Product Management

Multidomain MDM SaaS

John Thomas, Sr. Director, Product Management

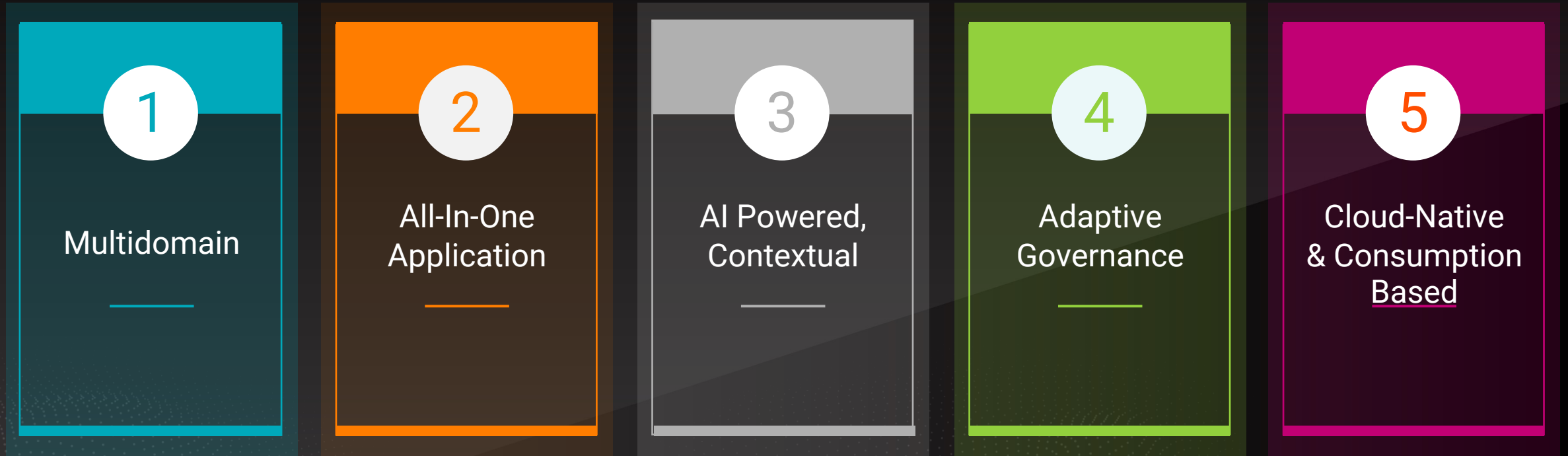
Oliver Soans, Director, Product Management

Russell Andrade, Sr. Manager Product Management

Bejoy Jacob, Sr. Manager Product Management



Pillars of Modern Master Data Management



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



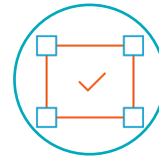
Model Master &
Reference Data



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

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

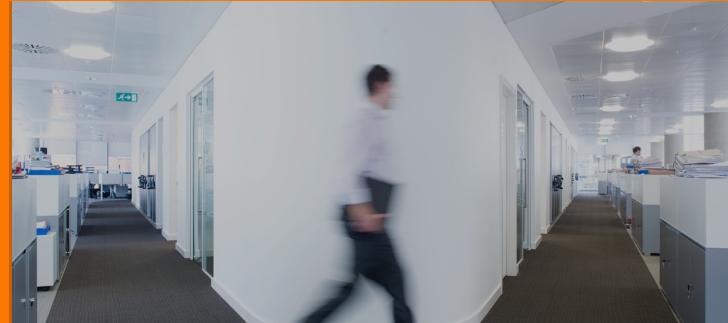
- Single click activation of Informatica DaaS for address verification for batch
- Easier to find events in history of changes on a Business Entity with new filtering options for record history
- Filtering on graph and hierarchy relationships
- Build custom workflows to support user-driven content enrichment 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

Features from recent releases



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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

Features from recent releases



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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

An aerial photograph of New York City at sunset. The sky is a mix of orange, yellow, and blue. The city is densely packed with skyscrapers, many of which have their lights on. The Empire State Building is prominent on the right side. A large, white, outlined arrow points from the left towards the right, centered in the image. The word "DEMO" is written in white, bold, sans-serif capital letters inside the arrow. There are orange diagonal stripes in the top-left and bottom-right corners of the image.

DEMO

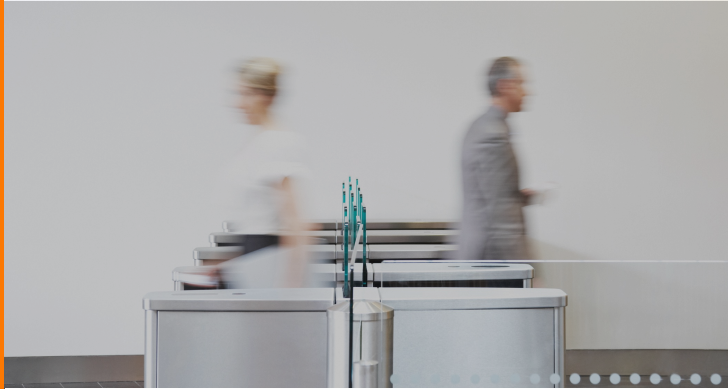
Features from recent releases



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

Features from recent releases



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PRODUCTIVITY

- 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

Features from recent releases



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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

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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



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.

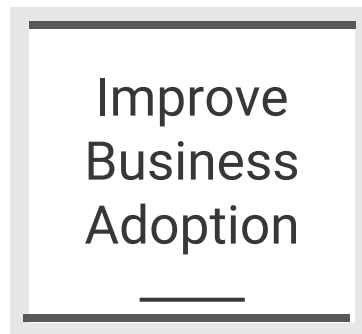
Integration Extensions

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

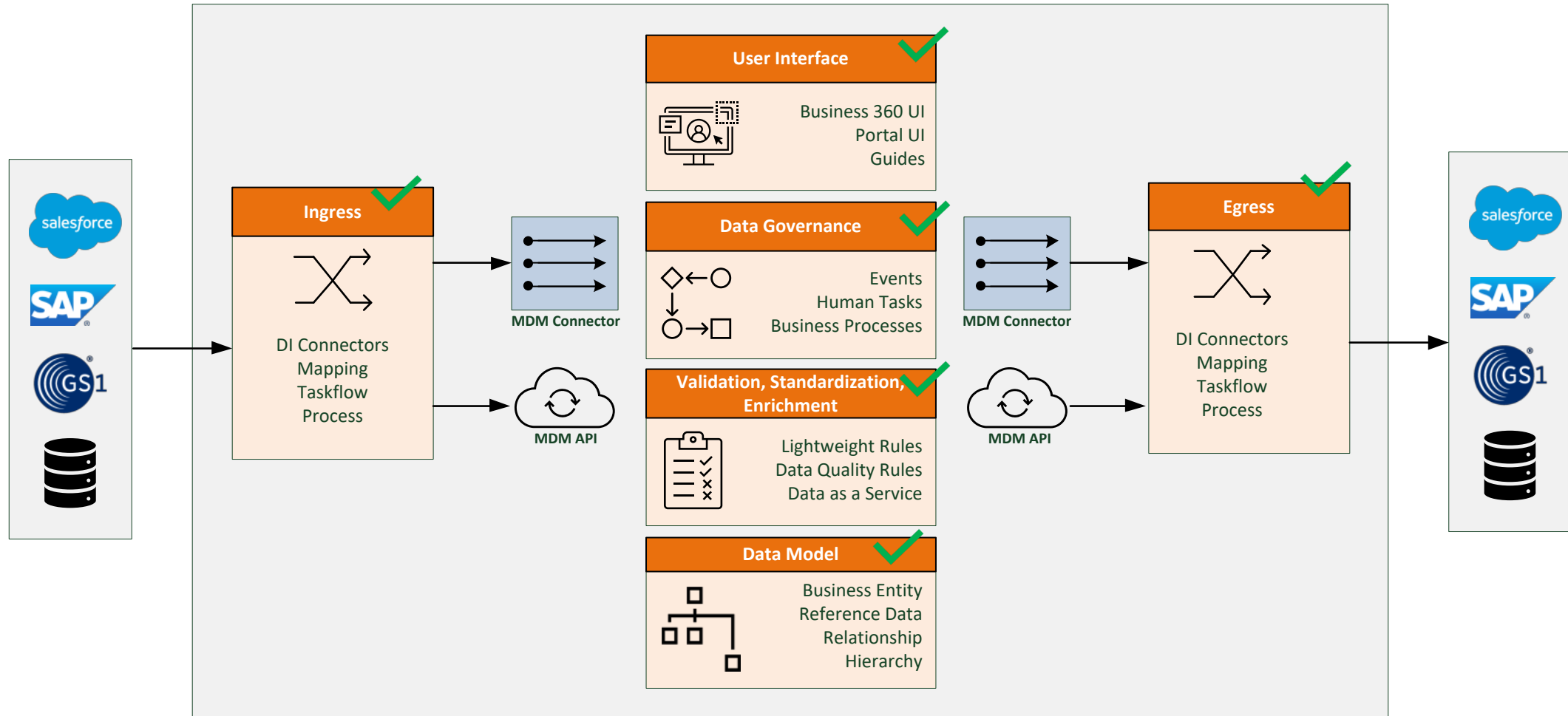
Industry Extensions

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

Advantages



MDM SaaS Extension on Intelligent Data Management Cloud



MDM SaaS Extensions - 2022

1 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

2 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
- 360° view of HCO & HCP
- Custom reports

3 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)

4 Healthcare Extension for Customer360

Master Providers, Members, Patients, Plans

- 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

5 Insurance Extension for Customer360

Master Customer, Agreement and Agent

- 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

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

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

The screenshot displays the Salesforce interface for matching records. The navigation menu includes Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, and Contacts. The search bar is set to 'All' and 'Search'. The 'Instructions' section is visible, followed by the 'Matching Records' section. The table below shows the following data:

ACCOUNT NAME ^	OWNERSHIP ^	PHONE ^		
<input type="radio"/> Apple Inc.	Public	4089961010	Guide	Oct 2
<input type="radio"/> Apple American Group LLC	Liability Limited By Guarantee	2165252776	Guide	Nov 1
<input type="radio"/> Apple Bank For Savings	Private	516R271R01	Guide	Nov 1
<input type="radio"/> Red Apple Group, Inc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> infac360sf_m_salesforce_account_organization_inbound	Mapping
<input type="radio"/> Apple Hospitality Reit, Inc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> infac360sf_m_salesforce_personaccount_person_inbound	Mapping
Showing 1 to 5 of 5 entries				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> infac360sf_m_salesforce_account_hierarchy_inbound	Mapping
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> infac360sf_m_salesforce_person_contact_outbound	Mapping
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> infac360sf_m_salesforce_accountpartner_partnerrel_inbound	Mapping
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> infac360sf_m_salesforce_contact_person_inbound	Mapping
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> infac360sf_m_salesforce_person_personaccount_outbound	Mapping
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> infac360sf_m_salesforce_organization_account_outbound	Mapping
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> infac360sf_m_salesforce_contact_contactrel_inbound	Mapping

Below the table, there is a section titled 'To view the details of a matching record, select the record, i' with buttons for 'View Record', 'Back', and 'Cancel'.

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
- 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 Customer360 interface for Carolina Salvador, a Prescriber, Physician (ID: 3147471171, SAINT LOUIS, Missouri, United States). The profile includes a summary card with her name, title, and ID, a social media hashtag #ONCOLOGY#INFLUENCER, and a 'Customer Since' section showing she has been a customer since July 01, 2010, with 11 years, 11 months, and 14 days. The profile also lists her specialties: Internal Medicine Physician (Secondary) and Hematology & Oncology (Primary), along with a license (2021045484) and a DEA number (FA9123456). A communication preference section is also visible.

Below the profile is a network diagram showing connections between Carolina Salvador and other healthcare professionals and organizations. The diagram includes nodes for Bjc Healthcare, Barnes-jewish Hospital, Washington University School Of Medicine in..., Barnes-jewish Center For Advanced Medicine, Stephen Yuan-tung Liang, and Tareq Issam Nabhan. A table on the right lists mapping rules for data onboarding:

Mapping Rule	Type
infac360ls_m_nppes_hcp_inbound	Mapping
infac360ls_m_nppes_hco_inbound	Mapping
infac360ls_m_medpro_hcp_inbound	Mapping

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

infac360sap_Occupation	Reference Data	
infac360sap_PersonRoleType	Reference Data	
infac360sap_TaxGrp	Reference Data	
SAP_ECC	Source System	Reference Data
SAP_S4HANA	Source System	Reference Data
infac360sap_ecc_rule_taxNumber	Rule Specification	Reference Data
infac360sap_bs_login	Business Service	
infac360sap_mplt_s4h_bp_inbound_rt	infac360sap_m_s4h_c360_org_batch_inbound_email	Mapping
infac360sap_hs_s4h_person	infac360sap_m_ecc_c360_org_batch_inbound_address	Mapping
infac360sap_hs_s4h_org	infac360sap_m_ecc_c360_person_batch_inbound_lang	Mapping
	infac360sap_m_s4h_c360_person_batch_inbound_tax	Mapping
	infac360sap_m_s4h_c360_person_batch_inbound_citizenship	Mapping
	infac360sap_m_s4h_c360_person_batch_inbound_language	Mapping
	infac360sap_m_s4h_c360_org_batch_inbound_root	Mapping

RED APPLE GROUP, INC.
800 3rd Ave Fl 5 | New York | New York | United States
2129565804

Record Details | Source Records | Hierarchy | History

General Details

Name: * RED APPLE GROUP, INC. Number of Employees:
Date of Incorporation: 06/30/1998 Liquidation Date:

Identifier

COFA
672345

Tax Details

Andorra: Tax Register Number (NRT)
782390

Address

Located At

800 3rd Ave Fl 5
New York | New York | United States | 10022

Role 1

Role:
Business Partner (Gen.)

Customer Type

Language

English
English

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

Attributes	Data Quality	Match	Survivorship	Events
Basic (17) Advanced (10) DaaS (3)				
Rule Association Name	Status	Description	Applied Field	
DUNSSSNValidation_AlternateIdentifier	Enabled	Validate if DUNS/SSN has a valid format	Identifier.Alternate Identifier Value	
infac360ls_ra_hcp_mpi_check_alt_id_value	Enabled		Identifier.Alternate Identifier Value	
infac360ls_ra_hcp_concat_full_name	Enabled			
infac360_ra_taxonomy>ReturnsSpecialty	Enabled			
infac360_ra_taxonomy>ReturnsSubSpecial...	Enabled			
infac360_ra_taxonomy>ReturnsGroup	Enabled			
infac360_ra_taxonomy>ReturnsName	Enabled			
infac360ls_ra_taxonomy>ReturnsSpecialty	Enabled			

Pauline Smith
8465392743, pauline_s@gmail.com
Grand Rapids, Michigan, United States

Summary Details Source Records Relationships History

Summary

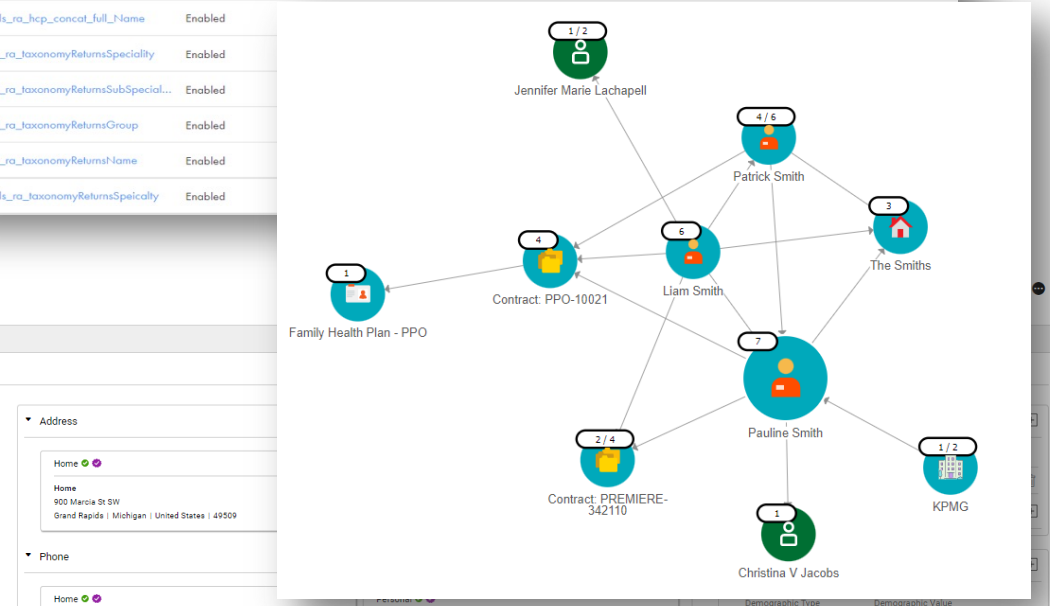
Pauline Smith
8465392743, pauline_s@gmail.com
900 Marcia St SW, Grand Rapids, Michigan, United States, 49509

Member Since: Jun 01, 1999 Years: 28 Months: 0 Days: 14

Decision Maker

Personal Information

Birth Date: 02/12/1990
Birth Place: Grand Rapids
Gender: Female
Designation: Senior Auditor
Marital Status: Married
Type: Member



Address

Home 900 Marcia St SW, Grand Rapids, Michigan, United States, 49509

Phone

Home 8465392743 LandLine
8364729413

Mobile 8364729413

Demographic Type

Age Group: 19-44
Ethnicity: Caucasian
Household Size: 3-5
Medical History: Diabetes mellitus

Lifestyle

Lifestyle Type: Lifestyle Value
Decision Maker: Yes
Smoker: Yes



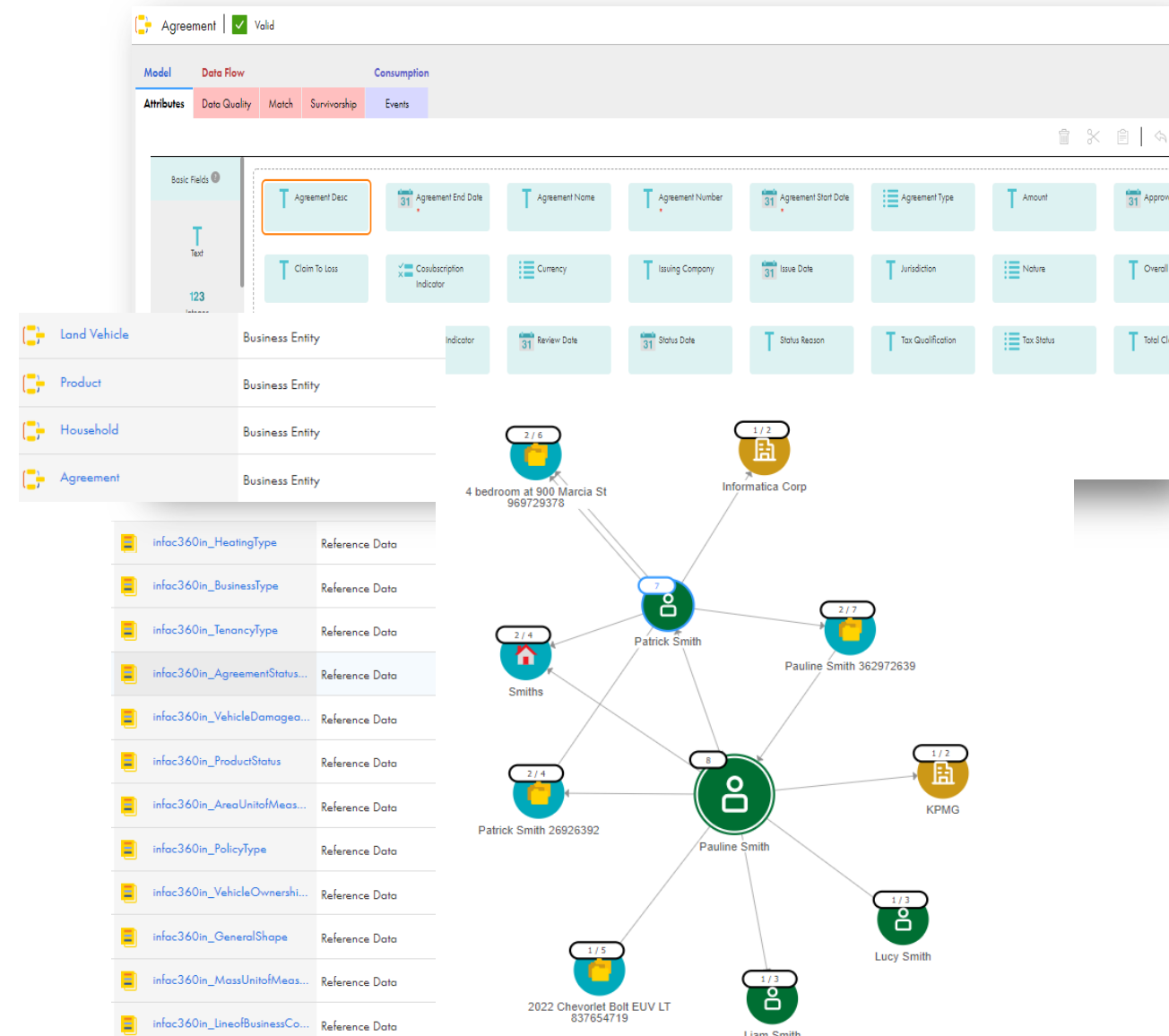
Insurance Extension for Customer360

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



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

The screenshot displays the Informatica Reference 360 interface, divided into two main sections: Explore and Design.

Explore View: Shows a tree view of data sets under 'Finance'. The selected data set is 'Enterprise R360: Chart of Account'. Below the tree, there are two data tables:

Name	Code	Description
Airline Expenses	160600	Airline Expenses Account
Car Rental Expenses	160700	Car Rental Expenses

Name	Code	Description
ABC Consumer Magazines ...	LE_617-264-189	ABC Consumer Magazines Holding ...
ABC Holding Company Inc.	LE_617-050-570	ABC Holding Company Inc.
Capital Cities/Abc, Inc.	LE_789-187-598	Capital Cities/Abc, Inc.
Disney Store Usa, LLC	LE_827-396-404	Disney Store Usa, LLC
Disney/ABC International Tel...	LE_103-279-154	Disney/ABC International Television, ...
Industrial Light & Magic (van...	LE_4427-6646	Industrial Light & Magic (vancouver) ...
Lucas Digital Ltd	LE_800-773-525	Lucas Digital Ltd
Lucas Learning Ltd	LE_160-001-616	Lucas Learning Ltd
Lucasfilm Entertainment Com...	LE_614-664-340	Lucasfilm Entertainment Company Ltd.
Lucasfilm Ltd. LLC	LE_6013-9946	Lucasfilm Ltd. LLC
Moonlight	LE_6013-8844	Moonlight

Design View: Shows a data flow diagram with the following components: 'src_sethheader', 'src_setleaf', 'jnr_header_leaf', 'str_asc', and 'tgt_standardcchierarchyle'. The flow starts from 'src_sethheader' and 'src_setleaf', goes through 'jnr_header_leaf', then 'str_asc', and finally to 'tgt_standardcchierarchyle'.

Legal Entity Master for MDM SaaS

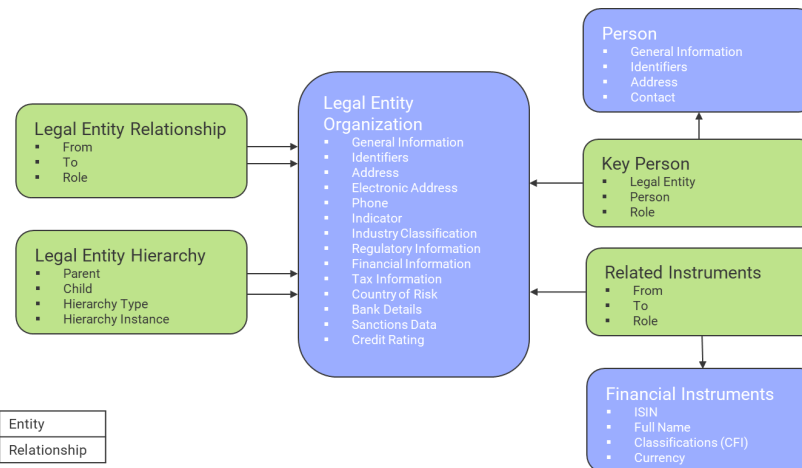
Solution for Financial services companies to manage legal entity data

- 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



Entity
Relationship

Thank You

Join us in the [Informatica MDM Group](#) on LinkedIn

