



Informatica® MDM - Supplier 360  
10.5 HF2

# User Guide

Informatica MDM - Supplier 360 User Guide  
10.5 HF2  
September 2023

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# Preface

Use the *Informatica® MDM - Supplier 360 User Guide* to learn how to create, consume, manage, and monitor supplier data in Supplier 360. Learn how to manage records, manage relationships between records, and update records.

## Informatica Resources

Informatica provides you with a range of product resources through the Informatica Network and other online portals. Use the resources to get the most from your Informatica products and solutions and to learn from other Informatica users and subject matter experts.

### Informatica Network

The Informatica Network is the gateway to many resources, including the Informatica Knowledge Base and Informatica Global Customer Support. To enter the Informatica Network, visit <https://network.informatica.com>.

As an Informatica Network member, you have the following options:

- Search the Knowledge Base for product resources.
- View product availability information.
- Create and review your support cases.
- Find your local Informatica User Group Network and collaborate with your peers.

### Informatica Knowledge Base

Use the Informatica Knowledge Base to find product resources such as how-to articles, best practices, video tutorials, and answers to frequently asked questions.

To search the Knowledge Base, visit <https://search.informatica.com>. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at [KB\\_Feedback@informatica.com](mailto:KB_Feedback@informatica.com).

### Informatica Documentation

Use the Informatica Documentation Portal to explore an extensive library of documentation for current and recent product releases. To explore the Documentation Portal, visit <https://docs.informatica.com>.

If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at [infa\\_documentation@informatica.com](mailto:infa_documentation@informatica.com).

## Informatica Product Availability Matrices

Product Availability Matrices (PAMs) indicate the versions of the operating systems, databases, and types of data sources and targets that a product release supports. You can browse the Informatica PAMs at <https://network.informatica.com/community/informatica-network/product-availability-matrices>.

## Informatica Velocity

Informatica Velocity is a collection of tips and best practices developed by Informatica Professional Services and based on real-world experiences from hundreds of data management projects. Informatica Velocity represents the collective knowledge of Informatica consultants who work with organizations around the world to plan, develop, deploy, and maintain successful data management solutions.

You can find Informatica Velocity resources at <http://velocity.informatica.com>. If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at [ips@informatica.com](mailto:ips@informatica.com).

## Informatica Marketplace

The Informatica Marketplace is a forum where you can find solutions that extend and enhance your Informatica implementations. Leverage any of the hundreds of solutions from Informatica developers and partners on the Marketplace to improve your productivity and speed up time to implementation on your projects. You can find the Informatica Marketplace at <https://marketplace.informatica.com>.

## Informatica Global Customer Support

You can contact a Global Support Center by telephone or through the Informatica Network.

To find your local Informatica Global Customer Support telephone number, visit the Informatica website at the following link:

<https://www.informatica.com/services-and-training/customer-success-services/contact-us.html>.

To find online support resources on the Informatica Network, visit <https://network.informatica.com> and select the eSupport option.

# CHAPTER 1

## Introduction to Informatica MDM - Supplier 360

This chapter includes the following topics:

- [Informatica MDM - Supplier 360 Application Overview, 11](#)
- [Supplier Management, 13](#)
- [Supplier Portal, 13](#)
- [Key Concept, 13](#)
- [Product Information Management Integration, 15](#)
- [Logging In, 15](#)
- [Supplier 360 User Interface, 16](#)

### Informatica MDM - Supplier 360 Application Overview

Informatica MDM - Supplier 360 provides clean, consistent, and connected information about suppliers. Business managers use this master supplier data to make better business decisions about suppliers and to implement processes that can save the organization money.

With Supplier 360, business users can achieve the following goals:

- Automate supplier applications and profile maintenance with the Supplier Portal.
- Streamline the supplier onboarding and approval processes.
- Centralize data about suppliers in a master database.
- Enrich supplier data with related information, such as compliance documents, for a true 360 degree view of a supplier.
- Reflect relationships among suppliers, parent companies, subsidiaries, and subsuppliers.
- Alert business managers to existing and upcoming compliance issues.
- Analyze suppliers based on attributes, such as performance, location, products, services, and invoices.
- Connect supplier data with the supplier product catalogs.
- Distribute trustworthy supplier data to business applications and analytical applications across the organization.

Supplier 360 is an application designed for Informatica Multidomain MDM. Business users connect to master supplier data through a business-friendly user interface, which displays an enterprise-level dashboard as well as 360 degree supplier views that are customized for different business users.

You can add optional products to your Supplier 360 environment. When the environment includes a product information management system, such as Informatica Product 360, suppliers can remotely upload product catalogs to the Product Information Management (PIM) system. When the environment includes Data-as-a-Service, all supplier contact information goes through a validation process.

Supplier 360 contains the following components:

- Supplier Relationship Management
- Supplier Portal
- Product Information Management Integration

## Example

A global automobile manufacturer experiences multiple issues with its supply chain. The management team has poor insight into everything from the total spend with a supplier to supplier performance.

Total spend is virtually impossible to assess. The manufacturer has hundreds of suppliers, and the supplier information is dispersed across multiple systems in different geographic areas. The same supplier can be in the systems under slightly different supplier names. The manufacturer holds multiple locally negotiated contracts with a supplier. Without a complete picture, the contract terms do not reflect the total spend with a supplier.

The management team does not have insight into supplier overall performance, such as the percentage of orders delivered on time over the last year. Therefore, managers do not take action to resolve performance issues. Late or incomplete shipments of parts continuously affect the supply chain. In some cases, managers have not lined up alternative suppliers for parts, so when parts are unavailable from one supplier, the manufacturing line falters.

Finally, the organization is acquiring another company later in the year. The management team wants a solution in place before that acquisition completes.

### Informatica Solution

The IT department implements Supplier 360. An administrator loads data from source systems into Supplier 360, which includes a centralized database for master supplier profiles. Within the centralized database, the application identifies potential duplicate suppliers.

Data stewards review potential duplicate suppliers and merge the supplier profiles as appropriate. Data stewards edit supplier profiles and set up supplier relationships by identifying parent companies and their subsidiaries. Whenever a data steward modifies a record that is part of a supplier profile, the data steward sends the record for review through an online business process.

With the reviewed and approved master data in place, data stewards send invitations to all qualified suppliers to register on the Supplier Portal. Registered qualified suppliers can update their information, add product catalogs, and monitor their performance. Other suppliers use the Supplier Portal to apply to become a supplier to the organization. Online application forms go through an online onboarding and qualification process.

Managers participate in reviews of supplier applications and monitor supplier performance and compliance. When business managers identify compliance and performance issues, they create alerts to notify suppliers of the issues. Managers edit supplier profiles and initiate a change-approval review from the Data workspace. Managers identify alternative suppliers for all key parts and invite the suppliers to complete an online application through the Supplier Portal.

## Results

Within the first year, the organization realized savings in the following areas:

- Saved on purchase prices by negotiating with suppliers to provide single favorable contracts for all locales, including volume discounts and early payment discounts
- Reduced costly delays in the supply chain by using alternative suppliers for parts and by monitoring and correcting supplier performance
- Reduced administrative costs by implementing a self-service approach for new suppliers to apply online and for existing suppliers to maintain their supplier data online
- Reduced administrative costs by using an automated business process for the qualification workflow
- Reduced the costs of integrating supplier data after the acquisition by adding the acquired systems as source systems to the MDM Hub

# Supplier Management

Supplier 360 adds features to the Informatica MDM environment, such as a database schema for supplier data, business processes for supplier management, and an interface that business users use to access supplier data.

Supplier relationship management includes approval of a supplier, supplier profile management, and assessment of the supplier performance.

# Supplier Portal

The Supplier Portal (Portal) is a web application. Supplier representatives use the Supplier Portal to initiate a relationship with your organization and to fill out an online application form. After business users in your organization approve a supplier, the supplier representatives use the Supplier Portal to upload documents, update information, and monitor performance. They might also be able to upload product catalogs into a PIM system.

For more information about the Supplier Portal, see [“Supplier Portal Overview” on page 123](#).

# Key Concept

To work effectively in Supplier 360, you need a basic understanding of the Informatica Master Data Management concepts.

## Records

When you use Supplier 360, you are working with master records. For example, a supplier record that contains the details about the supplier.

### **Master Records**

A master record contains a root record and multiple child records. In Supplier 360, the structure and display of the master records depends on the structure defined in either business entities or subject areas.

### **Parent Records**

The parent record or root record contains the data that identifies the record. For example, a parent record for a supplier contains the full name of the supplier, business name, business type and so on.

### **Child Records**

A child record contains data that is associated with a parent record. For example, a child record for a supplier might contain addresses of the supplier while another child record contact details of the supplier. Child records can have their own child records.

### **Active Records**

Active records contain approved master data.

### **Pending Records**

When you make a change to a record, the change might need to go through a review workflow before it can be approved as master data. While the record is pending approval, the record is called a pending record and you are restricted in the actions that you can perform on a pending record. When the change is approved, the record returns to the active record state.

## Business Entities

Business entities are an implementation of master data domains in your application. For example, the supplier master data domain can be implemented in the following types of business entities: Supplier, Contacts, or Accounts.

The business entity data structure maps to the base object tables in the Operational Reference Store database. The base object tables contain all the master records. For example, the parent node of a business entity corresponds to the root base object table. A child node in the business entity corresponds to a child base object table. Business entities can have an unlimited depth, though the views that display the child records might not be able to show all levels in a meaningful way beyond a certain depth.

# Product Information Management Integration

Product Information Management (PIM) systems create a single repository for all product data. In Supplier 360, a PIM system is an optional component. When the Application environment includes a PIM system, suppliers can upload their product catalogs from the Supplier Portal.

## Logging In

To log in, you need the URL for Supplier 360 and your user credentials.

1. Open a supported browser, such as Chrome.
2. Enter the URL for Data Director. The URL has the following format:  
`http://<MDM Server host name>:<MDM Server port number>/mdmapps/  
com.informatica.tools.mdm.web.auth/login`

The **Log In** page opens.

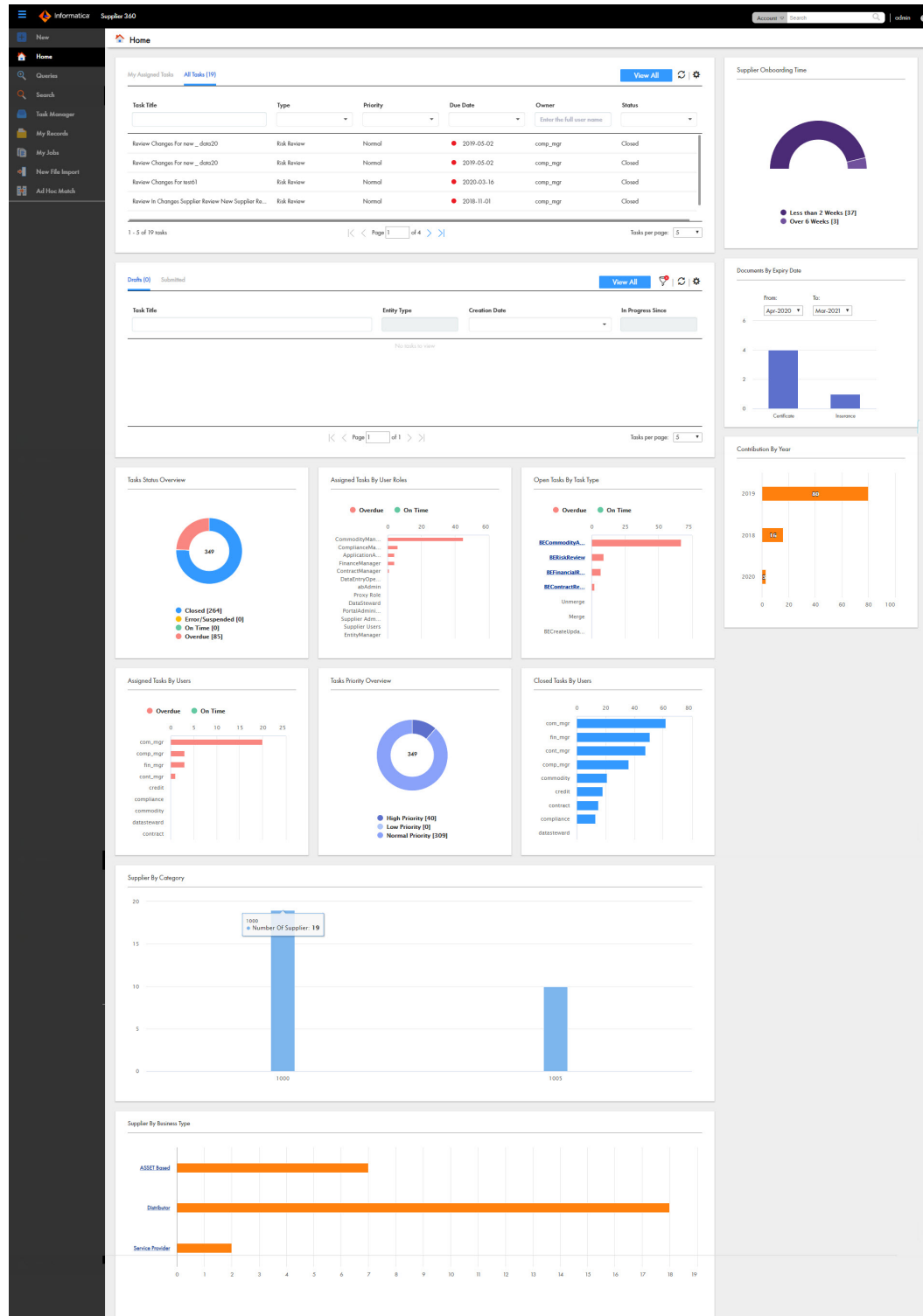
3. Enter your user name and password.
4. Click **Log In**.
5. If prompted, select **Supplier 360**.

The application opens and displays the **Home** page. Your username appears in the application header.

# Supplier 360 User Interface

The Supplier 360 user interface contains a navigation pane on the left and a details pane on the right. Each tab in the navigation pane opens its corresponding page, such as New menu, New File Import, and Task Manager. The details pane displays details about the link you select in the left navigation pane.

The following image shows the **Home** page of Supplier 360:





The Supplier 360 user interface contains the following tabs:

#### **Home**

The Home page is your dashboard and monitoring page. The page contains the tasks panel, records panel, and a collection of charts. The charts give a visual summary of the suppliers and task details. Managers and administrators can view a list of review tasks in the tasks panel. The records panel lists the records that you have submitted or saved as drafts.

#### **New**

The New page lists the type of master data that you can add. Your user role must permit you to add the master data. Use the New tab to add records.

#### **Search**

The Search page contains the search results. Use the Search page to find records. You can open a record from the search results.

#### **Task Manager**

The Task Manager page displays the tasks that are assigned to you and all unclaimed tasks. Use the Task Manager to organize, claim, and resolve tasks that the review processes generate.

#### **My Records**

The My Records page contains the list of drafts, submitted records, and the details pane. When you create a record, you can save the data as a draft. Use the My Records page to find, edit, and delete drafts. When a draft is complete, you can submit the draft for approval.

#### **New File Import**

The New File Import page contains the options to import data into Supplier 360.

#### **Ad Hoc Match**

The Ad Hoc Match page contains the options to perform an ad hoc match to compare the records you import with existing records.

## Charts and Graphs

Charts and graphs on the **Home** page contain enterprise-level information about all suppliers and tasks. You can view a visual representation of the suppliers and related information. You can view the breakdown of tasks, grouped by their state and priority.

The charts and graphs can be static or dynamic. The charts and graphs can be static or dynamic. You can select data in some charts and then navigate to another interface that shows the relevant records or tasks. You can select data in some charts and navigate to a drilldown chart that provides another layer of data granularity.

Before you analyze the data, ensure that the data reflects the current master data. Your administrator can add or remove charts from the **Home** page. All managers share the same **Home** page, so you might want to coordinate with other managers before requesting changes.

The following table lists the charts that you can see in the Home page of Supplier 360:

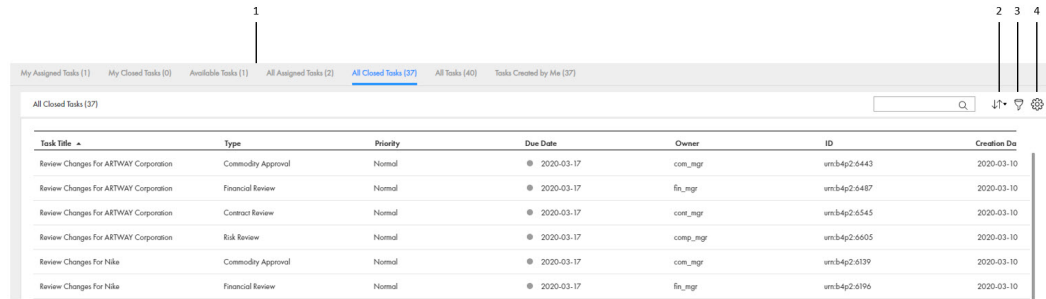
Chart	Description
Assigned Tasks By User Roles	Displays the total number of tasks assigned to each user role. If you click any user role in the chart, the Task Manager shows a list of tasks that belong to the selected user role.
Assigned Tasks By Users	Displays the total number of tasks assigned to each user. If you click any user in the chart, the Task Manager shows a list of tasks that belong to the selected user.
Closed Tasks By Users	Displays the total number of tasks closed by each user. If you click any user in the chart, the Task Manager shows a list of tasks that the selected user closed.
Contribution By Year	Displays the number of suppliers added in each year.
Documents By Expiry Date	Displays the number of suppliers whose documents will expire in the specified time period.
Open Tasks By Task Type	Displays the total number of tasks that are open for each task type. If you click any task type in the chart, the Task Manager shows a list of tasks that are of the selected task type.
Source Systems	Displays the total number of suppliers belonging to each source system. If you click any source system, the chart displays a breakdown of total number of suppliers belonging to the selected source system by year.
Supplier By Business Type	Displays the total number of suppliers based on the business types.
Supplier By Category	Displays the total number of suppliers based on the category of the suppliers.
Supplier By Region	Displays the total number of suppliers distributed across the world in a map. If you click any country, the chart displays the number of suppliers distributed across the states of the selected country. If you click any city, a list of suppliers who belong to the selected city appears as search results.
Suppliers Onboarding Time	Displays how long it took to onboard suppliers.
Task Priority Overview	Displays the total number of tasks and breaks down the tasks by priority.
Task Status Overview	Displays the total number of tasks and breaks down the tasks by status.

## Task Inbox

A task is a request to participate in a review process. For example, you might need to approve a new record or review changes to a record. You receive task notifications in the task inbox. By default, the task inbox

displays the tasks based on the first quick filter. For example, if the first quick filter is My Open Tasks, the task inbox lists all your open tasks.

The following image shows the task inbox with the All Closed Tasks filter selected:



1. Quick filters
2. Sort
3. Filters
4. Table Settings

The following table describes the elements in the task inbox:

Inbox Element	Description
Filters	Filters the tasks based on the filter criteria. You can use the following types of filters alone or in combination: <ul style="list-style-type: none"> <li>- Quick filters. Filters the tasks based on the predefined filter that you select.</li> <li>- Column filters. Filters the tasks based on the task properties that are visible in the list.</li> </ul>
View All	Displays the details of all the listed tasks in the Task Manager.
Refresh icon	Updates the contents of the task inbox.
Table Settings icon	Opens a dialog box where you can configure the columns for each quick filter listed in the task inbox.
Task Title	A link that displays a short description of the review task. To review the record and take action on the task, click the task title. The task opens in the Task Manager and displays the associated record in the review panel. If your role permits it, you can edit the record from this view before taking action on the task.
ID	Instance ID of the review process that generated the task.
Type	Name of a people activity within the process.
Priority	Priority of the task. The task priority can be Low, Normal, or High. When generating tasks, the review process assigns the same priority to all tasks of the same type.
Due Date	Date the task is due. The review process calculates a default due date based on the task creation date plus a predefined time period. The due date of each task is prefixed with one of the following colored dots: <ul style="list-style-type: none"> <li>- Green. Indicates that the task is not overdue.</li> <li>- Red. Indicates that the task is overdue.</li> <li>- Amber. Indicates that the task will be overdue in the next 24 hours.</li> </ul>

Inbox Element	Description
Status	Status of the task can be Open or Closed. When the task status is Open, you can view the record associated with the task.
Owner	Name of the signed-in user.
Creator	Name of the user who created the task.
Creation Date	Date on which the user created the task.

## My Records Page

Use the **My Records** page to organize your work and get an insight into your drafts and records submitted for approval. You can work on the drafts and submit them for approval.

To go My Records, click **My Records** in the left navigation pane.

## CHAPTER 2

# Getting Started

This chapter includes the following topics:

- [Getting Started Overview, 21](#)
- [Home Page, 21](#)
- [Sorting and Filtering Tasks, 23](#)
- [Configuring the Columns for the Task Inbox, 24](#)
- [Supplier 360 Dashboard View, 24](#)

## Getting Started Overview

As a business user, you use Supplier 360 to view and manage supplier profiles. Take a few minutes to familiarize yourself in the user interface and learn how to sort your tasks.

To get started:

1. Log in to Informatica Data Director and Supplier 360.
2. Understand the user interface.
3. Work with the task inbox.

## Home Page

The Home page is your dashboard and monitoring page that displays a list of tasks and a collection of charts and graphs.

The Home page contains the following components:

### **Task Inbox**

Before a supplier record is added, the record goes through a review process that involves reviewing tasks. By default, the task inbox displays the tasks based on the first quick filter. For example, if the first quick filter is My Open Tasks, the task inbox lists all your open tasks. The other tabs in task inbox includes My Closed Task, All Tasks, All Unclaimed Tasks, All Claimed Tasks, All Closed Tasks.

The following table describes the elements in the task inbox:

Inbox Element	Description
Filters	Filters the tasks based on the filter criteria. You can use the following types of filters alone or in combination: <ul style="list-style-type: none"> <li>- Quick filters. Filters the tasks based on the predefined filter that you select.</li> <li>- Column filters. Filters the tasks based on the task properties that are visible in the list.</li> </ul>
View All	Displays the details of all the listed tasks in the Task Manager.
Refresh icon	Updates the contents of the task inbox.
Table Settings icon	Opens a dialog box where you can configure the columns for each quick filter listed in the task inbox.
Task Title	A link that displays a short description of the review task. To review the record and take action on the task, click the task title. The task opens in the Task Manager and displays the associated record in the review panel. If your role permits it, you can edit the record from this view before taking action on the task.
ID	Instance ID of the review process that generated the task.
Type	Name of a people activity within the process.
Priority	Priority of the task. The task priority can be Low, Normal, or High. When generating tasks, the review process assigns the same priority to all tasks of the same type.
Due Date	Date the task is due. The review process calculates a default due date based on the task creation date plus a predefined time period. The due date of each task is prefixed with one of the following colored dots: <ul style="list-style-type: none"> <li>- Green. Indicates that the task is not overdue.</li> <li>- Red. Indicates that the task is overdue.</li> <li>- Amber. Indicates that the task will be overdue in the next 24 hours.</li> </ul>
Status	Status of the task can be Open or Closed. When the task status is Open, you can view the record associated with the task.
Owner	Name of the signed-in user.
Creator	Name of the user who created the task.
Creation Date	Date on which the user created the task.

### Charts and Graphs

Displays a visual representation of the suppliers and related information.

# Sorting and Filtering Tasks

You can sort and filter the list of tasks in the task inbox. For example, you might want to review edited records before you review merge proposals.

The task inbox contains quick filters and column filters. You can use these filters in combination to get specific results. For example, to see high priority tasks assigned to you, select the **My Open Tasks** quick filter and set the Priority column filter to `High`. In logical terms, filters are joined by the AND operator.

**Note:** You can set one column filter at a time. For example, you can narrow your list to Organizations and then further restrict the results to show only the Merge tasks for organizations.

1. In the navigation bar, click **Home**.

The task inbox appears.

2. To sort the list of tasks by a field, click the column heading with that field name.  
For example, to sort tasks by task type, click the **Task Type** column heading.

Sorts the tasks based on the values in the selected column. An up arrow beside the column heading indicates that the values are sorted in ascending order. A down arrow indicates descending order.

**Note:** By default, the task inbox sorts tasks case insensitively. If the number of tasks to sort is more than the value of the `CompositePagerTotalRecords` property, case-sensitive sorting is database dependent. For more information about the `CompositePagerTotalRecords` property, see the *Multidomain MDM Data Director Implementation Guide*.

3. To filter the list of tasks, set filter criteria in any order.

- To filter tasks by the most commonly used criteria, select one of the following quick filters:

Filter	Description
My Open Tasks	Shows your open tasks.
My Closed Tasks	Shows the tasks that you closed.
All Tasks	Shows all the closed, claimed, and unclaimed tasks that are assigned to your user group.
All Unclaimed Tasks	Shows all the unclaimed tasks that are assigned to your user group.
All Closed Tasks	Shows all the tasks that the users in your user group closed.
All Claimed Tasks	Shows all the tasks that the users in your user group claimed.

- To filter tasks based on the values of column headings, enter appropriate values for the following column headings:

Column	Description
Task Title	Shows tasks that contain the specified text. Enter the text that you want to search for in the task titles.
ID	Shows the tasks based on the value that you enter.

Column	Description
Type	Shows tasks with the selected task type. Select a task type from the list, such as <b>Final Review</b> or <b>Merge</b> .
Priority	Shows tasks with the selected priority, such as <b>High</b> . Select a priority from the list.
Due Date	Shows tasks that are overdue or due in a specific period. Select a due date option from the list.
Status	Shows tasks with the selected status, such as <b>Open</b> or <b>Closed</b> . Select a status from the list.
Owner	Shows tasks that are assigned to the user. Enter a user name.
Creator	Shows tasks that the specified user created.
Creation Date	Shows tasks that are created during a specific period of time. Select a creation date option from the list, such as <b>Last 7 days</b> or <b>Custom range</b> .

- To remove filters, click the **Clear Filter** icon.

## Configuring the Columns for the Task Inbox

By default, the task inbox displays the columns that the administrator configured for all the quick filters. For each quick filter, you can add or remove the available columns.

- In the navigation bar, click **Home**.  
The task inbox appears.
- Select a quick filter for which you want to configure the columns.
- Click **Table Settings**.  
The **Table Settings** dialog box appears.
- To add a column heading, in the **Available Fields** section, select a field and click **Add**.
- To remove a column heading, in the **Selected Fields** section, select a field, and click **Remove**.
- Click **OK**.

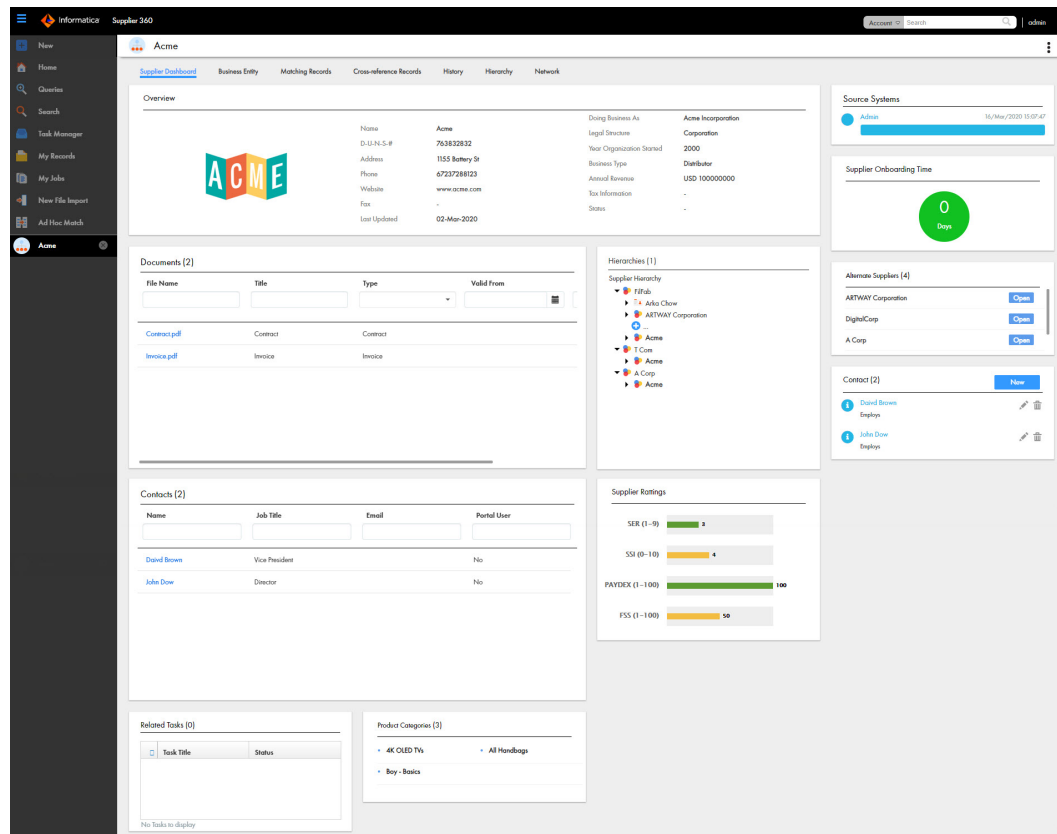
## Supplier 360 Dashboard View

The Supplier 360 Dashboard view is shipped with Supplier 360. The Supplier 360 Dashboard view displays a business view of the supplier. You can click a supplier record to view detailed information about the supplier.

You can view supplier details, such as company overview, supplier contacts, onboarding time for the supplier, product category of the supplier, alternate suppliers, tags associated with the supplier, supplier relationships with other suppliers in a hierarchical format, documents uploaded by the supplier, and supplier documents that are due for renewal.



The following image shows the Supplier 360 Dashboard view:



The Hierarchies panel displays how a supplier is related to other suppliers or contacts in a hierarchical format. A supplier can belong to multiple hierarchies. If an MDM Hub administrator defines a default hierarchy, the Hierarchies panel displays the default hierarchy for the supplier. Otherwise, the Hierarchies panel displays a list of hierarchies to which the supplier belongs. You can then select a hierarchy that you want to view. After you select a hierarchy, you can click a supplier or contact to view the supplier or contact details.

## CHAPTER 3

# Adding Records

This chapter includes the following topics:

- [Adding Record Overview, 26](#)
- [Suppliers Applying on the Supplier Portal, 26](#)
- [Business Managers Adding Supplier Records, 27](#)
- [Supplier Profiles Generated from Source Systems, 30](#)

## Adding Record Overview

A supplier record is added in the following scenarios:

- A business user approves a supplier application that the supplier submits through the Supplier Portal.
- A business user creates a supplier profile in Supplier 360.
- Business application and other systems in your organization that contain supplier information generate a record.

## Suppliers Applying on the Supplier Portal

Supplier representatives can discover the Supplier Portal through an internet search, register on the Portal, and fill out the online application form. A business manager can also register a supplier on the Supplier Portal and then invite a supplier representative to fill out an application.

Unsolicited and solicited applications go through the same qualification business process. After business users approve a supplier application, the supplier records that contain the supplier information change from a pending state to an active state. This change in state is all that is required to convert the supplier application to a supplier profile.

# Business Managers Adding Supplier Records

Business managers can use Supplier 360 to create a supplier record.

Supplier applications can arrive through avenues other than the Supplier Portal, such as through paper application forms distributed at conferences. You might want to create the initial supplier record from a paper application, and then invite the supplier to register on the Supplier Portal.

You also might need to create a supplier record for suppliers who do not want to perform this administrative task themselves.

## Adding Records Overview

To add records based on a business entity, use the **New** tab with the **Business Entity** option and select a business entity. For example, select **Supplier** business entity.

**Note:** In the **New** window, if you see both the **Business Entity** option and **Subject Area** option, ask the MDM administrator which one to use. The **Business Entity** option opens an entity tab while the **Subject Area** option opens the **Data** tab.

The MDM administrator defines the business entities, including the data and structure. The administrator also designs the layout of the record view that opens when you create a record. Your application can have one or more record views.

You might see the following panels in your record view when you create a record:

### Record Details panel

The main panel in the record view is the data entry form. Required fields are marked.

### Similar Records panel

If the record view contains the Similar Records panel, as you enter data in required fields, Supplier 360 generates a list of similar records for your review. Review the similar records before finishing the form. If you find the record already exists, you can edit the existing record instead of adding a new record. If you are uncertain whether a similar record is the same record that you want to add, continue adding the new record. If you add a duplicate record, Supplier 360 can find and consolidate matching records for you.

## Adding a Record

You can use Supplier 360 to add a record and send the record for review and approval. The record remains in the pending state until the record is rejected or approved.

**Note:** If the application environment includes Product 360, when you create a supplier profile, the application creates a matching supplier in Product 360. Product 360 restricts supplier names to 50 characters or fewer. You must enter a supplier name that complies with this restriction or the supplier activation in Product 360 fails.

To add a record, log in to Supplier 360 application, and then perform the following steps:

1. In the navigation bar, click **New**, select **Supplier** or any other business entity, and then click **OK**.  
An entity tab opens and displays the data entry form for the business entity. Required field are marked.
2. For each required field in the form, click the field, and type a value.

**Note:** The **Code** and **Description** fields in the **Product and Services** business entity do not support the following special characters reserved for URI and URL:

@ ! ' \* ( ) : ; \$ / ? % [ ]

The **Code** and **Description** fields in the **Product and Services** business entity support the following special characters:

# & , + =

3. If you want to add a supplier portal user, perform the following steps:
  - a. In the **Portal Association** field, select a value.  
**Note:** After you save the record, you cannot change the associated portal for the user.
  - b. In the **Contact** section, click **Create Child Record**, and enter values for the following fields:

Field	Description
Full Name	Full name of the portal user.
Email	Email address of the portal user.
Portal User Role	User role that you want to assign to the portal user. You can add only one supplier administrator user.
Portal User Indicator	Indicates whether you want to add the person as a portal user. Select this option.
Portal User Name	A user name for the portal user. For example, the email address of the portal user.

**Note:** You can enter values for other fields as required, and then click **Apply**.

- c. In the **Status** section, click **Create Child Record**, and enter values for the following fields:

Field	Description
Type	Type of status. Select <b>Onboarding Status</b> .
Status	Status of the supplier profile you want to onboard. If you are an administrator user, select <b>Approved</b> .

**Note:** You can enter values for other fields as required, and then click **Apply**.

4. If the **Similar Records** panel contains a list of similar records, review them.
  - a. In the **Similar Records** panel, click the information icon beside the name of a record.
  - b. Check the other data values to see if the record is the same as the one you are adding.
    - If it is the same record, click **Use this record**. When prompted for confirmation, click **Yes, proceed**. The work-in-progress record is discarded and the tab closes. The selected record opens in an entity tab. You can edit data as required.
    - If it is not the same record, click **Close**.
  - c. Review other similar records in the same way.
  - d. If a record does not exist, return to the tab containing the work-in-progress record.
5. In the data entry form, add data in the optional fields.
  - a. Fill in the fields.

- b. Optionally, add an image. Type a valid URL in the image field.
    - Note:** For best results, use an image that is a maximum of 200 x 200 pixels. For images, the MDM Hub stores the URL, not the file. If the location of the file changes, you must update the URL.
  - c. Click the **Apply** icon.
6. If the data entry form includes sections for child records, add child records to the sections.
- a. In the navigation menu, click a section name, such as **Address** or **Phone**.  
The view scrolls to the selected section.
  - b. Click **Create Child Record**.  
The data entry form for the child record appears.
  - c. Fill in the fields.  
The following image shows a sample **Address** section in the form view:

- 1. **Table view**
  - 2. **Form view**
  - 3. **Create Child Record**
  - 4. **Apply**
  - 5. **Discard**
- d. Click **Apply**.
7. After you finish adding data, click **Save**.  
A message confirms that the record was created successfully. If your user role permits you to save data without a review, the application saves the record to the MDM Hub Store as an active record. Otherwise, the application saves the record as a pending record and initiates the review process associated with your role.

## DaaS Validation Overview

Validation and verification of addresses, email addresses, and phone numbers improves the ability to connect to your contacts. Use the integration of Supplier 360 with Informatica DaaS for data verification and correction. You can verify contact information and store accurate data in the organization.

You can analyze, verify, correct, and format addresses according to the local postal standards. Ensure that the email addresses are valid and formatted correctly. Find email domains involved with spam networks, traps, and other malicious threats and verify that the email address is valid, not valid, or malicious. Verify the phone numbers and ensure your ability to connect.

### Address Verification and Standardization

You can improve the quality of your address data. You can correct, standardize, and verify international postal addresses in the address fields of your records. You can format the postal address according to the requirements of the local postal authorities.

Verify the postal addresses when you create records. You can also verify existing addresses and any changes you make to the address data.

You can verify an address when you select the verification check box and save the record.

## Email Address Validation

Verify the email address in the email address fields of the records. You can verify whether an email address exists and is formatted correctly. You can identify known or potentially dangerous email addresses or domains.

Validate and verify the email addresses in real time at the point of entry when you create a record. You can verify existing email addresses and any changes you make to the email address data.

You can verify an email address when you select the verification check box and save the record.

## Phone Validation

You can validate phone numbers in the phone fields of your records.

Validate phone numbers in real time when you create a record. You can validate existing phone numbers and any changes you make to the phone data.

You can validate a phone number when you select the verification check box and save the record.

**Note:** Phone number validation is accurate when you specify country code.

## Validating a Postal Address, an Email Address, or a Phone Number

You can validate the postal address, email address, and phone number of your records. You can perform the validation when you create a record or when you update a record. You can validate the data in the parent and the child fields.

1. Open the record creation form to add a record or search and select a record to edit.
2. Select the check box for the field you want to verify.  
To validate address, select **Validate Address**. To validate email address, select **Validate Email**. To validate phone number, select **Validate Phone**.

3. Enter data in the fields for address, email address, and phone number.

**Note:** For phone number validation, ensure that you provide the country dialing code.

4. Click **Save**.

For the postal address, email, and phone number fields in the parent record, validation happens when you move the cursor out of the data field. For the child records, validation happens when you save the record.

If the check box for a field is selected, Supplier 360 validates the data in the field and updates the validation status in the validation status field.

## Supplier Profiles Generated from Source Systems

The MDM Hub administrator adds source systems that contain supplier data as data sources to the MDM Hub. The MDM Hub creates supplier profiles based on the source data and identifies potential matches.

Depending on how the Application is configured, you might be asked to participate in the review process for some or all of the generated supplier profiles.

## Inviting Suppliers to Register on the Supplier Portal

After you verify generated supplier profiles, you can invite supplier representatives to sign into the Supplier Portal. Supplier representatives can review and update their supplier profile.

# CHAPTER 4

## Working with Draft Records

This chapter includes the following topics:

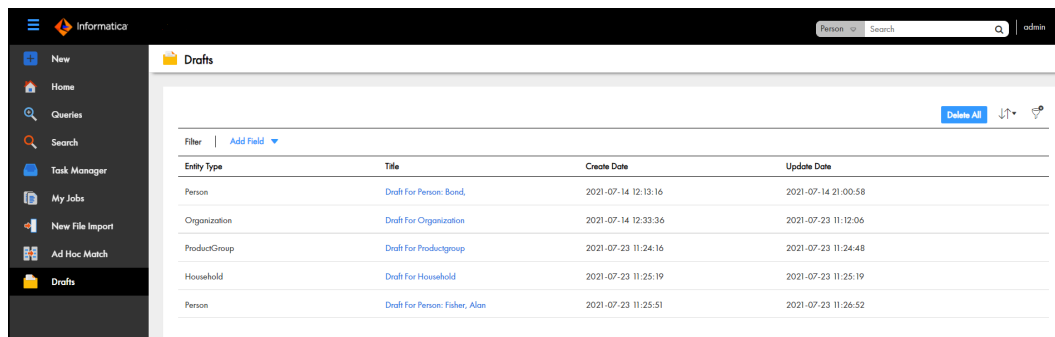
- [Working with Draft Records Overview , 32](#)
- [Adding a Draft Record, 33](#)
- [Editing a Draft Record, 33](#)
- [Submitting a Draft Record , 33](#)
- [Filtering Draft Records , 34](#)
- [Deleting Draft Records, 34](#)

### Working with Draft Records Overview

If your user role has the create and edit permissions, you can create a draft of a business entity record. You can partially fill in the record, save it as a draft, edit and complete it later, and then submit it for approval. Your draft records are not visible to other users.

Use the **Drafts** page to access and open your draft records. To go to the page, click **Drafts** in the left navigation bar.

The following image shows the **Drafts** page:



The screenshot shows the Informatica interface with the 'Drafts' page selected in the left navigation bar. The main content area displays a table of draft records. The table has columns for 'Entity Type', 'Title', 'Create Date', and 'Update Date'. There are six rows of draft records listed.

Entity Type	Title	Create Date	Update Date
Person	Draft For Person: Bond,	2021-07-14 12:13:16	2021-07-14 21:00:58
Organization	Draft For Organization	2021-07-14 12:33:36	2021-07-23 11:12:06
ProductGroup	Draft For Productgroup	2021-07-23 11:24:16	2021-07-23 11:24:48
Household	Draft For Household	2021-07-23 11:25:19	2021-07-23 11:25:19
Person	Draft For Person: Fisher, Alan	2021-07-23 11:25:51	2021-07-23 11:26:52



# Adding a Draft Record

You can partially fill in a business entity record, and then save it as a draft.

1. In the navigation bar, click **New**, select a business entity type, and then click **OK**.  
An entity tab opens and displays the data entry form for the business entity.
2. Add data to the record.
3. To save the draft of the record, click **Cancel**.  
The **Discard New Record** dialog box appears.
4. Click **Save as Draft**.  
The record is saved as a draft. You can access the draft on the **Drafts** page.

# Editing a Draft Record

You can edit a draft record to make changes and then submit it or keep it as a draft.

1. In the navigation bar, click **Drafts**.
2. Select the draft record that you want to edit.  
The record opens.
3. Edit the data in the draft record.
4. Perform one of the following actions:
  - To retain the record in the draft state, click **Cancel** and then click **Save as Draft**.
  - To submit the record, click **Save**.

If your user role permits you to save data without a review, the application saves the record to the Hub Store as an active record. Otherwise, the application saves the record as a pending record and initiates the review process associated with your role.

# Submitting a Draft Record

After you complete a draft record, you can submit it for approval. If your user role permits you to save data without a review, the application saves the record to the Hub Store as an active record. Otherwise, the application saves the record as a pending record and initiates the review process associated with your role.

1. In the navigation bar, click **Drafts**.
2. Select the draft record that you want to submit.  
The record opens.
3. Click **Save**.

## Filtering Draft Records

You can filter the draft records by the business entity type or title.

1. In the navigation bar, click **Drafts**.
2. Click the **Filter** icon.
3. Click **Add Field**, and select the filter that you want to apply.
4. Perform one of the following steps:
  - a. If you select **Entity Type**, select the type of business entity that you want to use as a filter.  
Data Director retrieves all the draft records that belong to the selected business entity type.
  - b. If you select **Title**, enter a value based on which you want to filter the drafts records.  
Data Director retrieves all the draft records that match the specified value.  
  
For example, if you enter the alphabet b, Data Director lists all the drafts records that contain the alphabet b in the title.

## Deleting Draft Records

You can permanently delete a single draft record, some draft records, or all draft records.

1. In the navigation bar, click **Drafts**.
2. Choose from the following options:
  - To delete a single draft record, hover over the record that you want to delete, click the **Delete** icon, and then click **Delete Draft**.
  - To delete multiple draft records, filter the records by business entity types or title, click **Delete All**, and then click **Delete All** in the confirmation dialog box.
  - To delete all the draft records, click **Delete All**, and then click **Delete All** in the confirmation dialog box.

# CHAPTER 5

## Finding Records

This chapter includes the following topics:

- [Finding Records Overview, 35](#)
- [Using the Search Box to Find Records, 37](#)
- [Using Queries to Find Records, 40](#)
- [Managing Queries, 44](#)
- [Filtering Child Records, 45](#)

### Finding Records Overview

To find a record, you can either enter a search text in a search box or use a query form. The search results show the most important details of the records. You can see more details by opening the records.

You can use the search box to search and filter records. However, to repeatedly perform the same search and filter operation, it is efficient to create and save a query.

Use the search box to perform a full-text search. Use a search query, which is a search form, to specify a criteria for your search.

When you use queries, you can search within a specific business entity for which the query is created. Whereas, when you use the search box, depending on your environment, in addition to searching within a business entity, you might be able to search across all business entities.

**Note:** The search options that you see depend on what was configured by the MDM administrator. You must have the required privileges for the business entities within which you want to search for records.

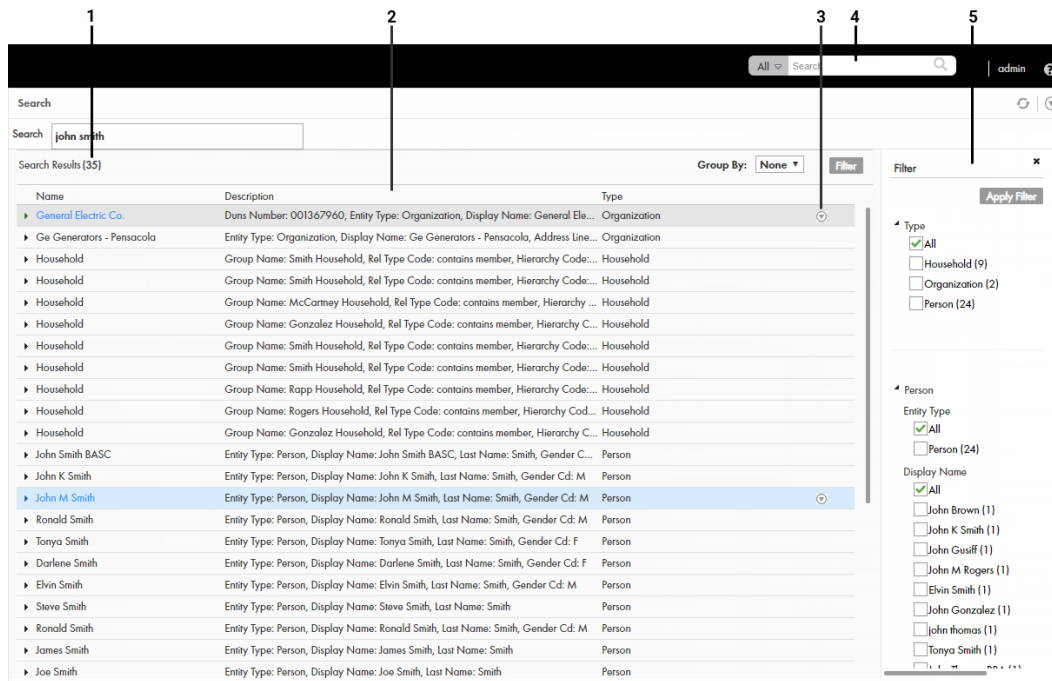
### Search Page

When you perform a search from the **Search** box in the application header, the **Search** page appears in the **Search** tab. A search returns a list of records that satisfy the search criteria.

Use the **Search** page to review the search results. You can expand a record in a search result to view the summary of record details. To refine the search results, you can use filters.

You can group the records that appear in search results based on the business entity types. If you group records, you can look for records in the relevant business entity type groups.

The following image shows a sample **Search** page:



1. Results total
2. Search Results panel
3. Actions menu
4. Search box
5. Filter panel

The **Search** page includes the following sections:

### Results total

Displays the total number of results found based on the search string that you enter in the **Search** box.

### Search Results panel

Displays the total number of results found and lists the records that are part of the search results. You can group the records listed in the search results by business entity type.

### Actions menu

Displays actions that you can perform on the record. For example, you can open the record in a view, such as the **Business Entity** view, or you can create a task for the entity.

**Note:** If your MDM administrator created a custom view for this purpose, the name of the view might be different.

### Filter panel

Displays the filter criteria to filter the search results. Use filters to refine the search results based on the filter criteria that you select or enter a value for. You can hide the **Filter** panel if you do not need to filter the search results.

### Filter criteria

Filter properties that you can select or enter a value for to refine search results.

## Queries Page

Use the **Queries** page to create and run queries. A query returns a list of records that satisfy the criteria that you specify.

To open the **Queries** page, click the **Queries** tab. If you have a default query, the default query opens. If not, the **Saved Queries** panel appears, and you can create a query or select a saved query.

After you run a query, the **Search Results** panel lists the records that satisfy the search criteria.

The following table describes the user interface elements of the **Queries** page:

User interface element	Description
Query panel	Lists the saved queries or the query that is open. The query that you create appears in the query panel.
Run	Runs the query that is open.
Save	Saves a query.
Back to Saved Queries	Displays the saved queries in the <b>Saved Queries</b> panel.
Query Results panel	Lists the records that satisfy the query criteria.

## Using the Search Box to Find Records

You can use the search box to perform search for records. You might want to search for records that you want to view, edit, or delete.

Your Supplier 360 application must be configured to use Elasticsearch. When your application is configured to use Elasticsearch, you can search for records within a single business entity.

To find a record, enter a complete or partial search string in the Search box. A search string can include keywords, numbers, and operators. Stopwords, such as *a*, *an*, *of*, and *with*, are ignored in the search process.

You can use the wildcard operators *\** and *?* in the search strings. The *\** wildcard operator is a placeholder that matches zero or more characters. The *?* wildcard operator matches a single character.

The following table lists example search strings and explains how they function:

Example Search String	Search Behavior
John	Searches for records that contain <i>John</i> , such as <i>John</i> , <i>John Smith</i> , <i>John Anderson</i> , and <i>John Anderson Smith</i> .
John Smith	Searches for records that contain <i>John</i> or <i>Smith</i> or both <i>John</i> and <i>Smith</i> , such as <i>John Smith</i> and <i>John Anderson Smith</i> .
John Anderson Smith	Searches for records that contain at least two of the terms that constitute the search string, such as <i>John Smith</i> , <i>John Anderson</i> , and <i>John Anderson Smith</i> . When more than two terms constitute a search string, at least $n-1$ terms are present in the search results. In this example, at least $3-1 = 2$ terms are present in the search results.

Example Search String	Search Behavior
John*	Searches for records that contain a value that starts with John, such as Johnson and Johnny.
Jo*n	Searches for records that start with Jo and ends with n, such as Johansson and Jordan.
Al?k	Searches for records with a single character between Al and k, such as Alek and Alok.
Ale?	Searches for records with a single character after Ale, such as Alek and Alex.
Smith-Jones	Searches for records that contain both Smith and Jones, such as Smith-Jones and Smith Jones.
Dave&Smith	Searches for records that contain Dave&Smith, which contain the special character &. You can search for records that contain special characters, such as &, +, =, and ~.
The Washington Post	Ignores the stopword The and searches for records that contain Washington, Post, or both Washington and Post.

## Finding Records in an Elasticsearch Environment

Use the search box to find a record.

1. In the **Search** box, select a type of business entity from the list.

**Tip:** The Search list contains the types of business entities that you have permission to view. If the list is empty, contact your MDM administrator to request permission.

2. In the **Search** box, perform one of the following tasks:

- Type the complete search string or the search string with the asterisk wildcard character (\*) for the record that you want to find. You can use the wildcard character at the end of the search string or in between the search string. For example, if you want to search for John, you can specify Jo\* or J\*n.
- If the search is configured to suggest search strings, type a few characters of the search string, and select one of the suggested values as the search string.

**Note:** The values are suggested when you search within a single business entity type.

If the search results must contain the words in the search string, add the + operator before each search word.

3. Click the **Search** icon.

The search results appear in the **Search Results** panel.

4. To refine the search results, you can apply filters.

## Filtering Records

After you perform a search, you can refine the search results by using filters. For example, you can refine the search results for John Smith by filtering the results by the city name, Toronto.

1. Perform a search.

The search results appear in the **Search Results** panel in the **Search** page.

2. In the **Filter** panel, select or enter a value for the filter criteria that you require.

**Note:** For a date and time field, you can specify the date in the filter, but not the time. The filter uses the default time as 00:00:00 UTC. Some numeric filters might appear in the scientific notation, even though the search results display the values in the decimal notation. For example, the filter might display 10544444.6 as 1.05444446E7.

3. Click **Apply**.

The search results contain only the records that match the filters that you applied.

4. To clear all the filter criteria, click **Clear All**.

## Viewing and Opening a Record in an Elasticsearch Environment

You can open records from the **Search Results** panel in the **Business Entity** view, or any record view. Before you open a record, you can preview the record. The preview appears in the **Record Preview** window and can display up to ten levels of records, which includes both parent and child record levels.

1. From the **Search Results** panel, select the record that you want to open.

**Note:** A description with the prefix [Pending] means that the record has pending changes that are not yet approved. You can open the record, but you cannot make further changes until the review and approval process ends.

2. To verify that you have the correct record, click the **Show Preview** icon.

The **Record Preview** displays the record details.

3. To open the record, click the **Open in a new window** icon.

The record opens in the **Business Entity** view. You can view and edit the record that is open.

4. If you want to open the record in any other view, click the **More Actions** icon, and then select **Record Details**. Select the tab that you want to view.

**Note:** The tabs that appear in the open record depend on the Data Director configuration and your user role privileges.

The following views might be available in the Data Director application:

View	Description
Matching Records	View the records that match the record that you opened. You can identify and resolve duplicate records.
Cross-reference Records	View the records that contribute to the best version of the truth of a record. You can unmerge a record that was merged with another record.
History	View data changes over the lifespan of the record. You can identify the data events that changed the data.
Hierarchy	View a tree diagram that shows the hierarchy relationships for the record. You can add, edit, and delete hierarchy relationships for the selected record.
Network	View a network diagram that shows how a record is related to other records. You can add, edit, and delete related relationships for the selected record.

The record opens in the view that you select.

# Using Queries to Find Records

Use a search query, when you want to repeatedly perform the same search and filter operation. When you use search queries, you specify a criteria for your search. You might want to use queries to find records that you want to view, edit, or delete.

To create and manage queries, use the **Queries** page. You can create a query to search for records based on a specific business entity. To reuse the query that you create, save the query. If you use a query frequently, you can set it as the default query.

When you create a query with a lookup field that is dependent on other lookup fields, these other lookup fields are automatically included in the query. For example, the City lookup field is dependent on the State and Country lookup fields. When you create a query to include only the City lookup field, the State and Country lookup fields are automatically included in the query.

## Types of Queries

You can use a basic or an extended query.

If a basic query does not return the results you are looking for, use an extended query. An extended query can find records that are missed by the basic query.

### Basic Queries

Basic queries use simple text comparisons to find records that contain the query values. You can use text and the wildcard character (\*) to query values.

The wildcard characters are special search symbols that you can use in basic queries to specify a text pattern instead of specific characters. You can use the asterisk (\*) wildcard character to increase your chances of finding the records that you want. The wildcard characters are useful when you do not know the exact text or want to search for similar text.

The following table lists example search strings and explains how they function:

Example Query String	Query Behavior
John Smith	Queries for records that contain John, Smith, or any variations of John or Smith as a field value.
"John Smith"	Queries for records that contain John Smith or any variations of John Smith as a field value.
John*	Queries for records that contain a value that starts with John. For example, Johnson or Johnny.
Jo*n	Queries for records that start with Jo and end with n. For example, Johansson or Jordan.
*	Returns all the records.

**Note:** Basic query is not case sensitive in Microsoft SQL Server environments.



## Extended Queries

Extended queries use matching logic and match-enabled attributes to find records that contain the query values. You must enable a match rule set to use with extended queries.

Extended query results include fuzzy matches, which are more reliable. Fuzzy matches take into account spelling variations, and other differences to ensure that matching data that are not identical are not missed. For example, an extended query can match variations of the word "Street", such as "St." and "St".

**Note:** The extended queries use match rule sets. If an MDM administrator edits or deletes a match rule set from the Hub Console, the related queries are deleted from the Data Director application.

When you use extended queries, ensure that the following conditions are met:

- The business entity has match-enabled attributes.
- The match rule set used by the query is configured by the MDM administrator to use the **Enable Search by Rules** option in the Hub Console.

## Creating a Query

You can create a query to search for records within a specific business entity. You are the owner of the queries that you create.

1. In the navigation bar, click **Queries**.
2. In the **Saved Queries** panel, click the **Add** icon.  
The **New Query** dialog box appears.
3. From the **Business Entity** list, select the business entity within which you want to perform the search.
4. Select a query type.

Query Type	Description
Basic	Uses simple text comparisons to find records that contain the query values.
Extended	Uses matching logic and match-enabled attributes to find records that contain the query values.

5. If you selected the extended query type, from the **Match Rule Set** list, select a match rule set.  
Select the **Default** match rule set only when a suitable match rule set does not appear in the list. A match rule is generated based on the values that you specify.  
The fields available for the selected match rule set appear.
6. Select the fields that you want to include as the search criteria for the query.  
The fields that you selected appear in the **Selected Fields** section.
7. In the **Selected Fields** section, drag to rearrange the sequence of the fields.  
The fields appear in the query form in the sequence that you set.
8. Specify the search results options.
  - a. To make the query case sensitive, enable the **Case sensitive** option.
  - b. To show pending records in the search results, enable the **Show pending records** option.
  - c. To sort search results, from the **Sort By** list, select a field name by which you want the search results sorted.
  - d. Select the sort order of the query to be ascending or descending.

9. Click **OK**.  
The query is created and opens on the **Queries** page.
10. To save the query for reuse, click **Save**.  
The **Save Query** dialog box appears.
11. Enter a query name and description.
12. If you want to use the query as a default query, enable **Set as my default**.  
The default query is the query that appears when you open the **Queries** tab.
13. If you want to share the query with other users, enable **Share with all**.  
By default, you own the query that you create. Other users cannot edit the queries that you own.
14. Click **Save**.  
The query is saved and appears on the **Saved Queries** panel.  
You can run the query that you created, or save the query and run it when needed.

## Running a Query

You can run a query to find records. To run a query that is not saved, enter the search criteria, and then run the query. To run a saved query, first, open the query.

1. In the **Saved Queries** panel, open the query that you want to run.
  - a. If a default query is open, but you want to run a saved query, click the **Back** icon to navigate to the **Saved Queries** page.
  - b. Expand the business entity to which the query belongs.
  - c. Click the query name.  
The query form appears.
2. Enter the search criteria for the record that you want to find.
3. Click **Run**.  
The query results appear in the **Search Results** panel.

## Viewing Query Results

After you run a query, you can view the query results that appear in the **Search Results** panel.

You can open records from the **Search Results** panel. Before you open a record, you can preview the record. The preview appears in the **Record Preview** window.

The **Record Preview** and the **Business Entity** view can display the parent records and up to ten levels of child records. The top two child record levels are expanded. To view the child record levels that are deeper, expand the record levels.

You can customize the results to view only the fields that are significant to your purpose. Also, you can export the results to a CSV file.

## Opening Records from Query Results

After you run a query to find records, you can open the records from the **Search Results** panel.

1. From the **Search Results** panel, select the record that you want to open.

2. Optionally, to verify that you have the correct record, preview the record.

a. Click the **Show Preview** icon.

The **Record Preview** displays the record details.

b. After you preview the record, click **Close**.

3. To open the record, click the **Open in a new window** icon.

The record opens in the **Business Entity** view. You can view and edit the record.

4. If you want to open the record in any other view, click the **More Actions** icon, and then select **Record Details**. Select the tab that you want to view.

**Note:** The tabs that appear in the open record depend on the Data Director configuration and your user role privileges.

The following views might be available in the Data Director application:

View	Description
Matching Records	View the records that match the record that you opened. You can identify and resolve duplicate records.
Cross-reference Records	View the records that contribute to the best version of the truth of a record. You can unmerge a record that was merged with another record.
History	View data changes over the lifespan of the record. You can identify the data events that changed the data.
Hierarchy	View a tree diagram that shows the hierarchy relationships for the record. You can add, edit, and delete hierarchy relationships for the selected record.
Network	View a network diagram that shows how a record is related to other records. You can add, edit, and delete related relationships for the selected record.

The record opens in the view that you select.

## Customizing Query Results

You can customize the query results that appear in the **Search Results** panel to include only the fields that you want to view.

1. From the **Search Results** panel, click the **Settings** icon.

The **Customize Query Columns** dialog box appears.

2. Select the fields that you want to display in the **Search Results** panel.

3. Optionally, change the order in which you want the fields to appear in the search results.

4. Click **OK**.

The **Customize Query Columns** dialog box closes. The query results include only the fields that you selected.

## Exporting Query Results

If you want to view the query results in a CSV file, export the query results to a CSV file.

► Export the query results to a CSV file.

- To export all the fields, including the fields that do not appear on the **Search Results** panel, click **Actions > Export All Fields**.
- To export only the fields that appear on the **Search Results** panel, click **Actions > Export Current Fields**.

**Note:** Before you export the query results, you can customize the results that appear on the **Search Results** panel to include only the fields that you want to export.

## Managing Queries

After you save queries, you might want to modify a query or delete a query that you do not need.

To manage queries, you can perform the following tasks:

- Edit a saved query.
- Delete a saved query.
- Save an existing query as a new query.

**Note:** The extended queries use match rule sets. If an MDM administrator edits or deletes a match rule set from the Hub Console, the related queries are deleted from the Data Director application.

### Editing a Saved Query

Use the **Saved Queries** panel to edit queries. You can edit any query that you own. You own the queries that you create or import into your environment.

1. In the **Saved Queries** panel, expand the business entity, and click the query.

The query opens.

2. Click **Actions > Edit Query**.

The **Edit Query** dialog box appears.

3. Edit the query as required.

You can make the following changes to the query:

- Add fields.
- Remove fields.
- Enable the query to be case-sensitive.
- Select a field name by which the query result must be sorted.
- Set the sort order to ascending or descending.

4. Click **OK**.

The query is updated. You can save or run the query.

5. Save or run the query.

### Deleting a Saved Query

For each business entity, you can delete the queries that you own.

1. In the **Saved Queries** panel, expand the business entity.

2. Select the query, and then click **Actions > Delete**.

The delete confirmation dialog box appears.

3. To delete the query, click **Yes**.

The query is deleted.

## Saving an Existing Query as a New Query

Instead of starting from scratch, you can use an existing query to create more queries. You can either select or open an existing query, and then save the it as a new query.

1. In the **Saved Queries** panel, select the query that you want to save as a new query.

2. Click **Actions > Save As**.

The **Save As** dialog box appears.

3. Enter a unique name and description for the query.

4. Optionally, enable any of the following query options:

- Set as my default. The query becomes the default query.
- Share with all. The query is shared with other users.

5. Click **Save**.

A copy of the query is saved with the new name, and the query opens.

6. Optionally, modify the new query.

- a. Click **Actions > Edit**.

- b. Edit the query as required.

You can make the following changes to the query:

- Add fields.
- Remove fields.
- Enable the query to be case-sensitive.
- Select a field name by which the query result must be sorted.
- Set the sort order to ascending or descending.

- c. Click **OK**.

The query is saved with the changes.

## Filtering Child Records

In a Business Entity view, you can filter the child records based on field values. Filters are enabled when the number of records in a child record section exceeds four records. Even though the child records might be listed in multiple pages, the filters are applied to the entire set of child records.

When you navigate away from the Business Entity view, the filters are cleared. When you switch between the form and table views, the filters persist.

**Note:** In the form view, when you filter by date, the records are filtered by date but not by time.

1. Expand a child record section.

- Click the **Filter** icon.  
The filter fields appear.

HARLEY, WILLIAM Business Entity

Quickly scroll to:

- Person
- Null Rels
- Bill address
- Org
- Email
- Relative
- Names
- Ship addresses
- Car
- Telephones
- Details

Bill address (12) ⊞ 🔔

Eff Start Date ^	Eff End Date	Opt In Ind	Preferred Ind	Address Type
<input type="text" value="YYYY-MM-DD"/>	<input type="text" value="YYYY-MM-DD"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
1966-09-14 00:00:00	2005-08-25 00:00:00	1	1	BILL
2005-01-18 00:00:00	2009-08-06 00:00:00	1	1	BILL
2007-10-29 00:00:00	2008-05-21 00:00:00	1	1	BILL
2009-02-18 00:00:00	2009-05-13 00:00:00	1	1	BILL
2009-08-06 00:00:00	2009-08-06 00:00:00	1	1	BILL

⊞
⏪ << Page 1 of 3 >> ⏩
View 1 - 5 of 12

Address (1) ⊞ 🔔

Address Line 1 ^	Unit Number	City Name	Postal Cd
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
MILWAKEE, CENTRAL SQUARE	123	MILWAKEE	123123

- Enter the filter criteria, and press the **Enter** key.  
The filters are applied, and the records that satisfy all the filter criteria are displayed.

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## CHAPTER 6

# Editing Records

This chapter includes the following topics:

- [Editing Records Overview, 47](#)
- [Editing a Single Record, 47](#)
- [Edit Multiple Records, 48](#)
- [Viewing and Adding Related Records, 50](#)
- [Deleting a Related Record, 51](#)
- [Editing Related Records, 51](#)
- [Deleting a Record, 52](#)
- [Adding a Tag, 52](#)

## Editing Records Overview

You can add or make changes to information in records. You can make changes to a single records or multiple records. To make changes to records, search for the record, and open the records in the Business Entity view.

If your user role permits it, you can edit the data or delete the record. When you save changes, based on your user role, a review process might be initiated. In this case, Supplier 360 saves the requested changes in a pending record until the review process ends. If the review ends in an approval, Supplier 360 applies the change from the pending record to the active records.

## Editing a Single Record

You might want to add or make changes to the information in a single record.

You might want to add information or make changes to the information in a single record. To make changes to a single record, search for the record, and open the record in the **Business Entity** view.

If your user role permits it, you can edit or delete a single record.

**Note:** When you edit a pending record, you can edit only the root record or a child record that does not have any pending changes.

When you save changes to a record, a review process might automatically initiate depending on your user role. In this case, Data Director saves the requested changes in a pending record until the review process

ends. If the review ends in an approval, Data Director applies the change from the pending record to the active records.

## Editing a Record

If your user role includes the edit permission, you can edit a record in the active state.

**Note:** You cannot edit a record that is in the pending state because the record has changes that are pending approval. You must wait until the review and approval process ends.

1. From the **Search Results** panel of the **Search** page, click the record that you want to edit.  
The Dashboard view of the record opens.
2. From the **View** list, select **Business Entity**.  
The record opens.
3. Click **Edit**.  
**Tip:** If the button is disabled, either you do not have permission to edit the record or the record has changes that are pending approval.
4. Edit the data in the parent record as required.
  - a. Click anywhere in the top section.  
The section becomes editable.
  - b. Edit the data.
  - c. Click the **Apply** icon.
5. Edit the data in child records as required.
  - a. Expand the child section.
  - b. Click the **Edit** icon.  
The section becomes editable.
  - c. Edit the data.
  - d. Click the **Apply** icon.
6. Click the **Save** button.  
If your user role permits you to save data without a review, the application saves the record to the MDM Hub Store as active records. Otherwise, the application saves the record as pending record and initiates the review process associated with your role.

## Edit Multiple Records

You can perform a bulk edit to replace one value in a certain field with another value across multiple records. Use the **Find and Replace** option on the search screen to perform a bulk edit.

For example, a hospital reports that multiple patient records include the wrong gender identity. You want to confirm which records are affected and correct the errors.

You find the affected records and determine the values to replace. After you verify the change, you inform the hospital that you updated the records.

After users update records in Data Director, the change triggers a review workflow process.

Your MDM administrator must enable permissions for your user role to perform bulk edit operations.



## Trigger the Bulk Edit Review Process

After you perform a bulk edit, the records update instantly. However, your MDM administrator can set up a workflow process to review and approve the records you want to replace. Any change to the records trigger a review process and saves the requested changes as pending for approval in the Task Manager.

Your MDM administrator or a user with privileges, such as, a manager, must claim and approve the records pending for approval. You cannot edit records pending for approval in the Task Manager.

The MDM administrator can also configure a bulk edit task to trigger a batch job. If the records to replace are below the value set by your MDM administrator, a batch job does not trigger. If the records to replace are above the value set by your MDM administrator, a batch jobs triggers.

For example, your MDM administrator sets one thousand records as the maximum value to trigger a batch job. If you update one thousand records or more, a batch job triggers. If you update less than one thousand records, a batch job does not trigger and the records update instantly.

## Editing Multiple Records

If your user role includes the bulk edit permission, you can edit multiple records in the active state.

**Note:** You cannot edit a record that is in the pending state because the record has changes that are pending approval. You must wait until the review and approval process ends.

1. From the **Search** panel of the **Search** page, search for records that you want to change.  
The records appear in the **Search Results** panel.  
**Note:** You can also use the Queries panel to search for previously searched records.
2. In **Filters** select filters to narrow down your search results.  
The **Search Results** panel displays the records that are directly related to the values that you input in the **Filters** panel.
3. Click the Find and Replace icon.  
The **Find and Replace** window opens.
4. In the **Find in:** drop-down list, select a column and enter the value to find in the column.
5. Click **Find**.  
The search results show only the records that match the specified value. If there are no results, either change the **Find** criteria or exit the **Find and Replace** view and run a separate search.
6. In the **Replace with:** field, enter the new value.
7. Click **Replace All**.  
A message displays confirming if you want to replace the records.
8. Click **Replace All**.  
A confirmation message appears displaying the number of records replaced.

## Viewing the Status

# Viewing and Adding Related Records

Business entity relationships describe the affiliation between two entities. The MDM Hub supports one-to-many and many-to-many relationships between business entities, in addition to hierarchical relationships between records in the same business entity. You can add, view, edit, and manage relationships between a business entity and the records related to the business entity.

In the Related Records panel, you can see the business entities that you have permission to view. To create relationships between different types of business entities, your user role must include the edit permission for both types of business entities.

When a relationship exists between two entities, you can add related records to a business entity.

**Note:** If you do not see the Related Records panel when you edit a business entity, contact the MDM administrator.

## Adding a Related Record

When a record has relationships configured, you can add related records to records. Search for and open the record in the **Business Entity** view. Search for the related record that you want to add as a related record and add the record in the **Related Records** panel.

**Note:** The **Related Records** panel must be present in the **Business Entity** view. To create relationships between different types of business entities, your user role must include the edit permission for both types of business entities.

1. From the **Search Results** panel in the **Search** page, select the record to which you want to add the related records.
2. Open the record.

The **Related Records** panel displays the records that are directly related to the record you open. There might be more than one **Related Records** panel. For example, **Contact, Relationship**.

3. In the **Related Records** panel, click **New**.

The **Add a Related Record** dialog box opens.

4. Select the relationship type.
5. In the **Search** box, type the complete search string or the search string with the asterisk wildcard character (\*) for the record that you want to find.
6. Click **Search**.
7. In the **Filters** panel, select a value for the filter criteria that you require.
8. Click **Apply Filter**.

The revised search results appear in the **Search Results** panel based on the filters you set.

9. Select the record that you want to add as related record and click **Select**.
10. If the relationship has additional attributes, specify the additional attributes.
11. Click **Apply**.

The record is added as related record and appear in the **Related Records** panel.

## Viewing Related Records

You can view the related records in the **Related Records** panel. Each related record in the component is a link that you can open in the **Business Entity** view.

**Note:** If your MDM administrator created a custom view for this purpose, the name of the view might be different.

1. From the **Search Results** panel in the **Search** page, select the record.
2. Open the record.

The related records are listed in the **Related Records** panel.

## Deleting a Related Record

You can delete the relationship between a record and a related record. Search for the record and then delete the related record in the **Related Records** panel.

1. From the **Search Results** panel in the **Search** page, select the record that you want to edit.
2. Open the record.

The **Related Records** panel displays the records that are directly related to the record you open. There might be more than one **Related Records** panel.

3. Select the related record that you want to delete, and then click the **Delete** icon.

A confirmation box appears.

4. Click **Yes**.

Supplier 360 deletes the relationship between the record and the related record and no longer displays the related record in the **Related Records** panel.

## Editing Related Records

You can edit the details of the relationship between a record and the related record. You can edit the additional attributes associated with the relationship. Search for the record and edit the relationship from the **Related Records** panel.

1. From the **Search Results** panel in the **Search** page, select the record that you want to edit.
2. Open the record.

The **Related Records** panel displays the records that are directly related to the record you open. There might be more than one **Related Records** panel.

3. In the **Related Records** panel, select the related record that you want to edit, and then click the **Edit** icon.
4. Edit the additional attributes, and then click **Apply**.

## Deleting a Record

If your user role includes the delete permission, you can delete records in the active state. You cannot delete a record that is in the pending state because the record is part of a workflow and is pending approval.

1. From the **Search Results** panel in the **Search** page, select the record that you want to delete.
2. Open the record.
3. Click **Actions > Delete**.  
A confirmation box appears.
4. Click **Yes**.  
Supplier 360 marks the record as deleted and no longer displays the record, but does not remove the record from the database.

## Adding a Tag

Tags are a way to associate a label or information to a supplier. You can add tags to a supplier in the dashboard view.

1. Search for a supplier.
2. Select the supplier to which you want to add the tags.
3. In the **Tags** panel, click **Add a Tag**.
4. Enter the tag that you want to add to the supplier, and click **Add**.
5. Repeat step [4](#) until you add all the tags to the supplier.
6. Click **Done**.  
All the tags are added to the supplier.

## CHAPTER 7

# Searchable Lookup Fields Overview

You can add a Business Entity record as the searchable lookup field value in Supplier 360 pages such as the Record or Registration pages.

## Editing Searchable Lookup Fields

You can edit searchable lookup fields to add a Business Entity record as the field value.

To edit a searchable lookup field, perform the following steps:

1. From the page that you want to edit, click the edit icon of the searchable lookup field.  
The **Search Results** page appears with the list of associated Business Entity records. The list of associated Business Entity records might be filtered if default values were specified in the filter fields in the portal configuration.
2. Select the record that you want to specify as the searchable lookup field value.
3. Optionally, to filter the list of records in the search results, enter a filter criteria in the Filters panel, and click **Apply**.  
The list of filtered records appears.
4. Click **OK**.  
The selected Business Entity record appears as the field value of the searchable lookup field.

## CHAPTER 8

# Managing Record Versions

This chapter includes the following topics:

- [Managing Record Versions Overview, 54](#)
- [Viewing Record Versions, 54](#)
- [Comparing Record Versions, 55](#)
- [Adding Record Versions, 56](#)
- [Editing Record Versions, 57](#)
- [Deleting Record Versions, 57](#)
- [Setting the End Date or Time of Record Versions, 58](#)
- [Investigating Data Changes in a Record Version, 58](#)
- [Viewing Record Versions in the Timeline View, 59](#)
- [Establishing the Best Version of the Truth for Record Versions, 60](#)

## Managing Record Versions Overview

If timeline is enabled for a base object, you can manage record versions in the **Business Entity** view. A record can have multiple versions, and each version can be effective for a specific time period.

You can define the record versions based on their effective periods. Data changes occur over time and are independent of their relationship to other data. You can update the effective period or the data of past, present, or future versions. You can track these changes to data over a period of time.

For example, John Smith lived in Los Angeles effective from 31 January 2008 to 20 October 2010. He now lives in San Francisco effective from 21 October 2010. He will live in Las Vegas effective from 25 November 2014. You can track past, present, and future changes to data, such as the address data of John Smith.

## Viewing Record Versions

Use the **Business Entity** view to view record versions. You can view record versions based on the effective date or the effective period.

1. From the Search Results panel of the **Search** page, open the record that you want to view.  
The **Business Entity** view appears.

2. To view a record version, perform the following steps:
  - a. In the **View By** list, select one of the following values:
    - **Effective Date**. Displays the record version based on a specific date. The record version appears based on the date that you select in the **Effective Date** field.
    - **Effective Period**. Displays the record version by the effective period that you select in the **Effective Period** field.
  - b. Select a date for the effective date or a date range for the effective period.
3. To view versions of a child record, expand the child record.

## Comparing Record Versions

You can view the differences between two record versions in the **Business Entity** view. When comparing two versions, you can see the fields that were added, updated, and deleted.

1. From the Search Results panel of the **Search** page, open the record that you want to view.
2. Select a record version that you want to compare to another version.
3. Click **Compare**.  
In the left panel, you can see the records details based on the selected version.
4. In the right panel, select the effective date of the version that you want to compare with the version in the left panel.
5. Click **Compare**.

You can see the differences highlighted in different colors based on the change type.

The following table describes the change types and their corresponding color:

Change Type	Color
Add	Green
Update	Yellow
Delete	Red

6. To filter the fields, click **Filter**, and then select a predefined filter.

The following table describes the predefined filters:

Predefined Filter	Description
Show All Changes	Shows all fields that were added, updated, and deleted.
Show Deleted	Shows only the fields that were deleted.

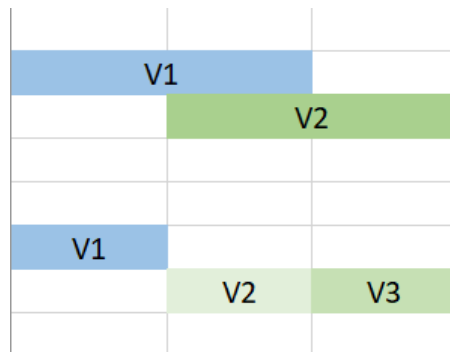
Predefined Filter	Description
Show Added	Shows only the fields that were added.
Show Edited	Shows only the fields that were updated.

## Adding Record Versions

You can add versions to existing parent and child records. When you add a version, you specify the effective period of the version and whether the data of the version must be copied from an existing version or created manually.

If the effective period of the new version overlaps with the effective period of existing versions, the effective period of the new version gets adjusted to avoid any overlaps with the existing versions.

For example, if you add a new version V2 that overlaps with V1, the system creates V2 and V3, and updates V1.



1. From the Search Results panel of the **Search** page, open the record that you want to view.
2. Click **More Actions** and then select **Add Version**.  
The **Select New Version Options** dialog box appears.
3. Configure the following values:
  - **Effective Period.** The time period during which the version must be valid.
  - **Version Data.** Indicates whether the new version must use record data from an existing version or create new record data.
  - **Copy From.** The effective period of the existing version that the new version must use for record data.
4. Click **Select**.
5. Click **Submit**.
6. Add versions to a child record as required.
  - a. Expand the child section.
  - b. Expand a child record, and then click **Add Version**.
  - c. Select the start and end dates of the version and add the details.
  - d. Click **Apply**.
  - e. Click **Submit**.

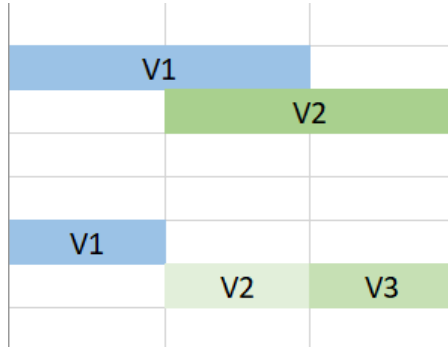


# Editing Record Versions

You can edit the data of an existing record version. For example, you might want to edit the effective period of the version.

**Note:** If the effective period of the new version overlaps with the effective period of existing versions, the effective period of the new version will be adjusted to avoid any overlaps with the existing versions.

For example, if you add a new version V2 that overlaps with V1, the system creates V2 and V3, and updates V1.



1. From the Search Results panel of the **Search** page, open the record that you want to view.
2. Select a version.  
For more information about selecting a version, see [“Viewing Record Versions” on page 54](#).
3. Click **Edit**.
4. Edit the data that you want to change.
5. Click **Apply**.
6. Edit the data of a child record.
  - a. Expand the child section.
  - b. Expand the child record.
  - c. Select a version, then click **Edit**.
  - d. Edit the data that you want to change.
  - e. Click **Apply**.
  - f. Click **Submit**.
7. Click **Submit**.

# Deleting Record Versions

You can delete a record version that you no longer need. When you delete a record version, its child records are no longer associated with the version.

1. From the Search Results panel of the **Search** page, open the record that you want to view.
2. Delete a child record version as required.
  - a. Expand the child section.

- b. Expand a child record.
  - c. Select a version, then click **More Actions > Delete Version**.
  - d. Click **Submit**.
3. Select a parent record version.  
For more information about selecting a version, see ["Viewing Record Versions" on page 54](#).
4. Click **More Actions**, and then select **Delete Version**.  
A confirmatory message appears.
5. Click **Delete**.  
The version is deleted and its child records are no longer associated with the version.

## Setting the End Date or Time of Record Versions

You can set the end date or time of a record version. When you set the record end date or time, the end date or time of the last version of the record gets adjusted. You can select an end date or time between the start date or time of the first version and the end date or time of the last version.

**Note:** After you set the end date or time, future record versions are deleted, and you cannot retrieve them.

1. From the Search Results panel of the **Search** page, open the record that you want to view.
2. Click **More Actions**, and then select **End Date or Time**.  
The **Set Record End Date or Time** dialog box appears.
3. Select the end date or time.
4. Click **Submit**.
5. Set the end date or time of a child record version as required.
  - a. Expand the child section.
  - b. Expand a child record.
  - c. Select a version, and then click **More Actions > End Date or Time**.  
The **Set Record End Date or Time** window appears.
  - d. Select the end date or time.
  - e. Click **Submit**.

## Investigating Data Changes in a Record Version

Use the **History** view to investigate data changes of a record version. The History view displays a chronology of data changes over the lifespan of the record version. You can view the data that existed in the record version at any point in time in the chronology. View the data before a data event and after a data event to determine if the event caused the inappropriate data change. A data event is any action that changes the data in a record version, such as an edit or a merge operation.

1. From the Search Results panel of the **Search** page, open the record that you want to view.
2. Click the **History** tab.

3. Select **Search for versions**.  
The **Version** field appears.
4. Select a record version.
5. To show or hide different types of events, in the left panel, click the **Filter** tab.
6. To select a time unit to group data events, in the middle panel, click **Options**, and select a different timescale. For example, select **M** to select a monthly timescale.
7. In the middle panel, select an event.  
The event details panel shows the record version details before and after the event and the time when the record version was updated.
8. To view the history of child record version, in the left panel, select a child record and its version.

## Viewing Record Versions in the Timeline View

Use the **Timeline** view to view the versions of a record. The **Timeline** view displays a chronology of versions over the lifespan of a record.

1. From the Search Results panel of the **Search** page, open the record that you want to view.
2. Click the **Timeline** tab.
3. In the middle panel, select a date range to view the versions of the record.  
The versions appear in descending order.
4. To select a time unit to group data events, in the middle panel, click **Options**, and select a different timescale. For example, select **M** to select a monthly timescale.
5. In the middle panel, select a version.  
The details of the record version appear in the right panel.
6. In the right panel, perform the following actions:
  - a. To view the data changes in the version, click **More Actions > Open Version History**. For more information about viewing data changes in a version, see [“Viewing Record Versions in the Timeline View” on page 59](#).
  - b. To edit the version, click **More Actions > Edit Version**.  
The **Business Entity** view appears.
7. To add a version to the record, click **Add Version**.  
The **Business Entity** view appears.
8. To view the version of a child record, perform the following steps:
  - a. In the left panel, expand a child folder and select a child record.
  - b. In the middle panel, select a date range to view the versions of the child record.  
The versions of the child record appear in the middle panel in descending order.

# Establishing the Best Version of the Truth for Record Versions

Use the **Cross-reference Records** view to determine the source data that contributes to a record version. You can then make adjustments to how source data is consolidated to ensure that the record version represents the best version of the truth.

For more information about establishing the best version of the truth for record versions, see [GUID-678EF469-1E48-46B3-BC8B-195AD827480F](https://docs.microsoft.com/en-us/microsoft-dynamics-365/finance/establishing-the-best-version-of-the-truth-for-record-versions).

## CHAPTER 9

# Importing Bulk Data

This chapter includes the following topics:

- [Import Bulk Data Overview, 61](#)
- [Import Bulk Records, 62](#)
- [Import Bulk Relationships, 62](#)
- [Update Records, 63](#)
- [Field Mapping, 63](#)
- [Preview Records, 65](#)
- [Importing Data, 66](#)
- [Trigger the New File Import Review Process, 68](#)
- [File Import Summary Report, 68](#)
- [Match New Records with Existing Records, 69](#)

## Import Bulk Data Overview

You can import data and relationships in bulk from an Excel or a CSV source file into Data Director. Data with unicode characters, such as, Chinese, Japanese and Korean are supported. You can import up to 10000 records at a time. However, your administrator can increase or decrease the maximum number of records to import in the properties file.

Before you import new data and relationships, the system identifies and maps the best target fields based on the columns in the source file or the value of existing records. You can compare the target fields and the source file and accept or reject the system suggested mapping.

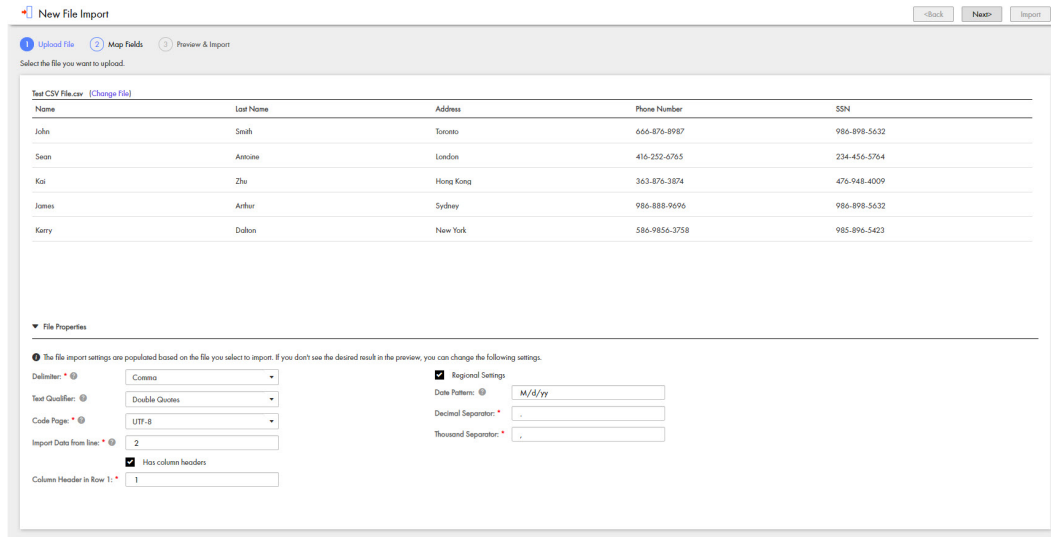
After the import operation is complete, it generates an import summary that shows the number of imported and rejected records. If your user role permits, Data Director saves the imported records as active records. Otherwise, if your user role is configured to trigger a review process, Data Director saves the imported records as pending records and initiates the review process associated with your role.

# Import Bulk Records

You can import data with multiple business entities from an Excel or CSV source file. The import process helps you to create or update multiple primary records in a single operation. You can stop the import at any point while it is in progress. However, you cannot roll back the imported records.

Importing file names with special characters are not supported. For example, you cannot import the following file: My:File.csv. The following special characters are not supported: / \ \* ? % : | " < >

The following image shows the New File Import window with a CSV file imported:



The file properties populate based on the file you select to import. You can edit the import file properties. Refer to [“Importing Data” on page 66](#)

# Import Bulk Relationships

You can import relationships in bulk and define new relationships. You can select previously mapped relationships or manually define relationships between business entities. For example, you can define a relationship between a Person business entity and a SecurePerson business entity.

The following image shows how you can define relationships in the Relationship panel:

Target Field	Source Column Header
▼ Person relative SecurePerson	
Primary Key	
Source Key	
From	Entity ▼ Person ▼
To	Entity ▼ SecurePerson ▼
Rel Type Code	
Rowid Hierarchy	

The system assigns icons to the mapped relationship fields. The icons indicate the level of confidence associated with each mapped relationship. You can accept or reject the mapped relationship based on the confidence indicators.

For more information about confidence levels, refer to [“Field Mapping” on page 63](#).

## Update Records

You can import data to update existing parent records, update child records and add child records. For example, you want to update a primary address field and add a secondary address to the record. You must import data to update the parent record and add the secondary address as a new child record.

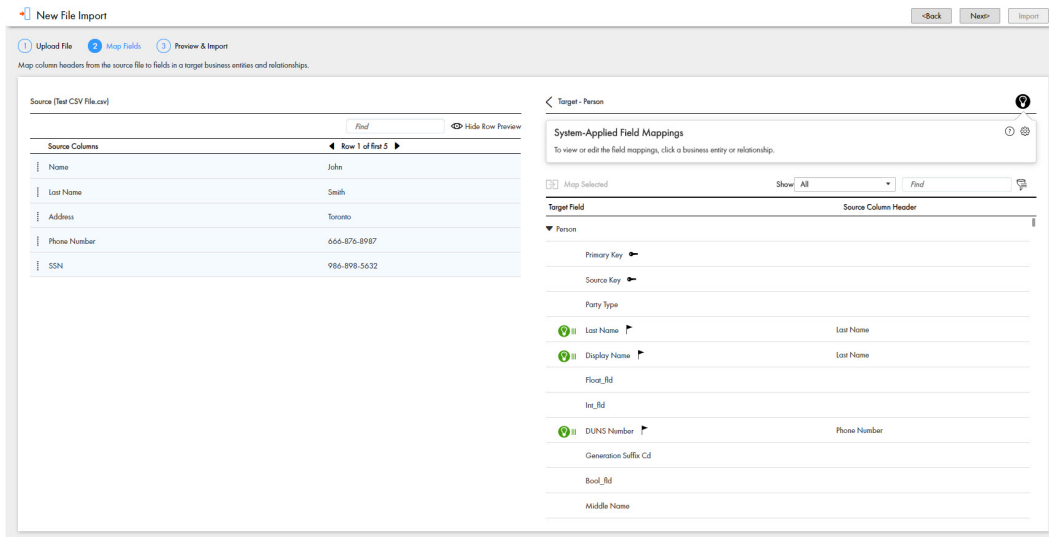
Before you import data to update parent records, add the row ID primary key or the source key in the source file. To update child records, add the parent row ID, child row ID or the child cross reference primary key in the source file. To update cross reference records, add the cross reference primary key in the source file.

**Note:** When you import a file to update records using the source key and the source system, you must enter a value in all required fields. If you do not enter a value in the required fields, an error displays.

## Field Mapping

You can map columns from your source file to suitable business entities and relationships in Data Director.

The following image shows the source columns and the identified business entities:



Confidence icons are assigned to the most suitable business entities. The icons indicate the level of confidence associated with each business entity. You can accept or reject the business entities based on the confidence indicators.

The following table describes the confidence icons:

Confidence Icon	Description
	Indicates a high level of confidence. All source columns are mapped to the business entities. You can manually review and accept the mapping.
	Indicates a medium level of confidence. All source columns are mapped to the business entities with a moderate level of confidence. You can manually review and accept or reject the mapping.
	Indicates a low level of confidence. All source columns are mapped to the business entities with a low level of confidence. You should reject the mapping.

## Setting Default Values

You can use the additional settings option to set default values for target fields. If a source field contains a null value, the target field is populated with the default value.

For example, you have set the default value for the social security target field to populate as 111-11-1111. If the social security source field does not contain any value, the system populates the social security target field with the default value of 111-11-1111.

You can also set a default value for the Date Format target field. For example, you set the default value as YYYY-MM-DD. If the source field has the date format as DD-MM-YYYY, the system populates the date format to the default value of YYYY-MM-DD.

## Filtering Target Fields

You can use filters to view the required target fields and source columns.



The following table lists the filter options:

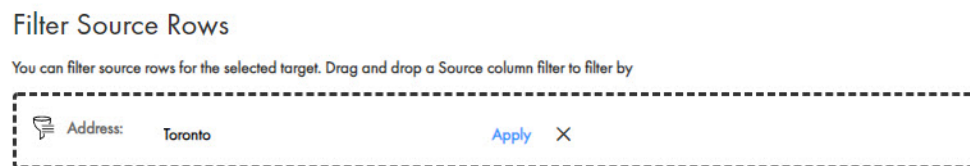
Filter Option	Description
Mapped	Displays all mapped source columns and target fields
Unmapped	Displays all unmapped source columns and target fields
User Mapped	Displays all user mapped source columns and target fields
Auto Mapped	Displays all system mapped source columns and target fields
All	Displays all source columns and target fields

## Filtering Source Rows

You can use the Filter Source Rows option to filter and manually map source rows to the target business entities or relationships. For example, the source file contains a CreditCard source row and you need to map this row to the correct target business entity. Drag and drop the CreditCard source row to the Filter Source Rows panel. A list of target business entities display with Credit Card as one of the options. You can map the CreditCard source row to the Credit Card target business entity.

1. In the **New File Import** panel, under **Map Fields**, click the filter icon.

The **Filter Source Rows** box appears.



2. From the source columns, drag and drop a source row to the **Filter Source Rows** box.

The source row appears in the Filter Source Rows box.

3. In the text box, enter a filter condition and click **Apply**.

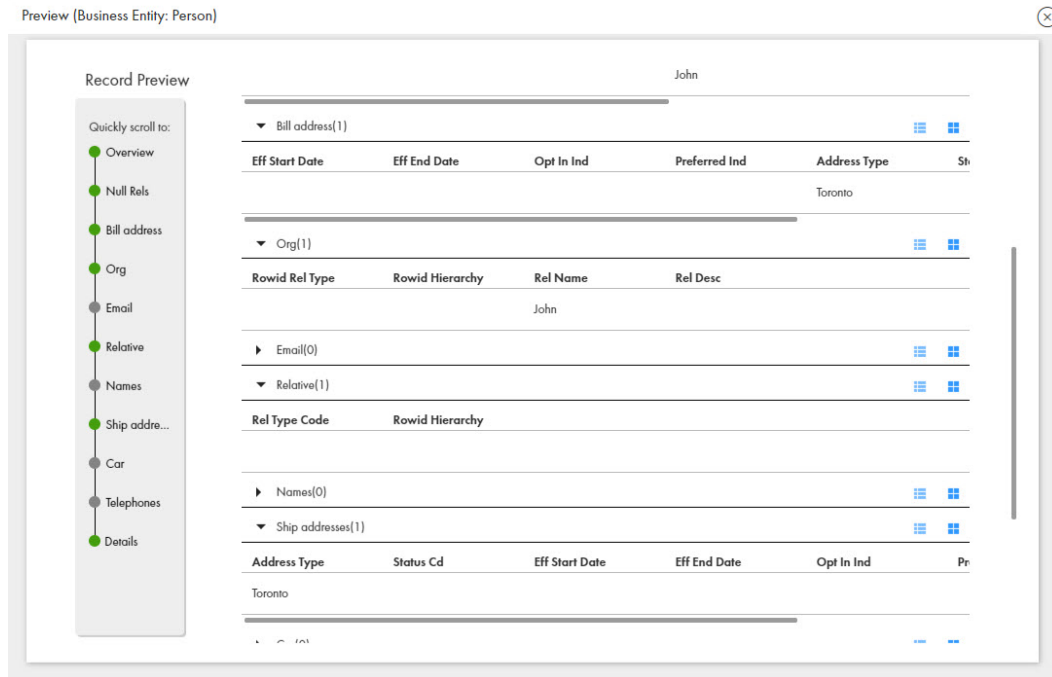
The target business entities appear based on the filter conditions you enter.

## Preview Records

Before you complete the import file operation, you can preview the records to import.

Click the **Show Preview** icon to view details of the records to import. You can view the applicable root, parent, child, lookup and dependent lookup fields.

The following image shows the **Record Preview** panel with the records to import:



## Importing Data

You can import data in bulk into Supplier 360. The import operation allows you to import multiple records and relationships from a source file into Data Director.

1. In the left navigation pane, click **New File Import**.

The **New File Import** page opens.

2. To select the file to import, drag and drop a CSV or Excel source file or click **Browse** and select the source file.

The source file data uploads.

**Note:** You cannot import file names with special characters.

3. Click **Next**.

The source file with the imported data displays.

4. In the **File Properties** panel, specify the following import file properties:

Property	Description
Delimiter	Character that represents the break between data values in the import file. Select a predefined delimiter or select <b>Other</b> to define a custom delimiter.
Text Qualifier	Symbols used in the file to enclose a string.
Code Page	Select the unicode encoding standard.

Property	Description
Import Data from Line	Select the row of the source file you want to import data from.
Column Header in Row 1	Select the row header number you want a column.
Regional Settings	Set the date and time formats based on your geographical location.
Date Pattern	Date format for the date fields in the import file.
Decimal Separator	Decimal separator. Choose a comma or a period. Default is a period.
Thousand Separator	Thousand separator. Choose no separator, a comma, or a period. Default is no separator.

5. Click **Next**.  
The **Map Fields** page displays the source file data, the system suggested targets and the confidence indicators.
6. You can perform the following actions:
  - a. To accept the system suggested mapping, click **Accept**. The suggested mapping appears under the Business Entity.
  - b. To reject the system suggested mapping, click **Reject**.
  - c. To partially accept the system suggested mapping, select the checkbox next to the business entities and click **Accept**.
7. Expand the business entities or relationships to review the list of mapped target fields. Filter the mapped target fields to view how the target fields were mapped.
  - a. Click the **Show** drop down list.  
A list of filter options appear. Select one of the following options:

Filter Option	Description
Mapped	Displays all mapped source columns and target fields.
Unmapped	Displays all unmapped source columns and target fields.
User Mapped	Displays all user mapped source columns and target fields.
Auto Mapped	Displays all system mapped source columns and target fields.
All	Displays all source columns and target fields.

8. Click **Next**.  
The **Preview and Import** screen opens.
9. To specify the source system you want to import from, select an option from the **Source System** drop down.  
**Note:** If you see a preview error in any field, your source file might have an invalid value. For example, if a social security number field contains alphanumeric characters, a preview error appears. You must correct all preview errors in the original source file and import the file again.
10. You can preview the records before you import the file. Click **Show Preview**.

11. Click **Import**.

After the import process is complete, the My Jobs window displays the number of imported records, rejected records and unprocessed records.

12. To download the list of rejected records as a CSV file, click **Download**.

## Trigger the New File Import Review Process

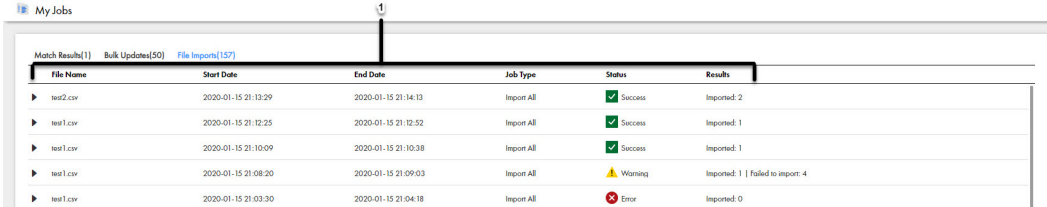
After you import a new file with bulk data, a review process triggers and saves the requested changes as pending records in the Task Manager. Your MDM administrator or a user with the correct privileges, such as, a manager, must claim and approve the pending records. You cannot edit records pending for approval in the Task Manager.

All bulk import tasks trigger a batch job. The MDM administrator must configure the maximum value of a bulk import task to trigger a batch job. For example, your MDM administrator sets one thousand records as the maximum value to trigger a batch job. If you import one thousand records or more, a batch job triggers. If you import less than one thousand records, a batch job does not trigger and the records are imported instantly.

## File Import Summary Report

When you import data and relationships into Supplier 360, the import operation generates a summary report. In the navigation bar, click **My Jobs** to view the list of imported files.

The following image shows the My Jobs page with the list of imported files:



File Name	Start Date	End Date	Job Type	Status	Results
test2.csv	2020-01-15 21:13:29	2020-01-15 21:14:13	Import All	Success	Imported: 2
test1.csv	2020-01-15 21:12:25	2020-01-15 21:12:52	Import All	Success	Imported: 1
test1.csv	2020-01-15 21:10:09	2020-01-15 21:10:38	Import All	Success	Imported: 1
test1.csv	2020-01-15 21:08:20	2020-01-15 21:09:03	Import All	Warning	Imported: 1   Failed to import: 4
test1.csv	2020-01-15 21:03:30	2020-01-15 21:04:18	Import All	Error	Imported: 0

1. File Name
2. Start Date
3. End Date
4. Job Type
5. Status
6. Results

You can expand the file to view results of the imported file.

The following image shows a sample import summary report:

File Name	Start Date	End Date	Job Type	Status	Results																														
test1.csv	2020-03-12 20:18:35	2020-03-12 20:18:51	Import All	Success	Imported: 5																														
					<table border="1"> <thead> <tr> <th></th> <th>Total</th> <th>Persisted</th> <th>Load Errors</th> <th>Parsing Errors</th> </tr> </thead> <tbody> <tr> <td>Automobile</td> <td>1</td> <td>1</td> <td>0</td> <td>0</td> </tr> <tr> <td>Organization</td> <td>1</td> <td>1</td> <td>0</td> <td>0</td> </tr> <tr> <td>Organization emp...</td> <td>1</td> <td>1</td> <td>0</td> <td>0</td> </tr> <tr> <td>Person New label</td> <td>1</td> <td>1</td> <td>0</td> <td>0</td> </tr> <tr> <td>PersonToAutomobi...</td> <td>1</td> <td>1</td> <td>0</td> <td>0</td> </tr> </tbody> </table>		Total	Persisted	Load Errors	Parsing Errors	Automobile	1	1	0	0	Organization	1	1	0	0	Organization emp...	1	1	0	0	Person New label	1	1	0	0	PersonToAutomobi...	1	1	0	0
	Total	Persisted	Load Errors	Parsing Errors																															
Automobile	1	1	0	0																															
Organization	1	1	0	0																															
Organization emp...	1	1	0	0																															
Person New label	1	1	0	0																															
PersonToAutomobi...	1	1	0	0																															

The following table describes the elements of the Results field:

Elements	Description
Total	Total number of records imported.
Persisted	Number of imported records persisted without errors.
Load Errors	Number of rejected records not imported due to load errors.
Parsing Errors	Number of rejected records not imported due to parsing errors.

The import operation writes rejected records to an Excel or CSV file. You can download rejected records, update the records with the correct data and re-import the corrected records.

## Match New Records with Existing Records

Before you import a file, you can perform a match to compare the records you import with existing records. The match process identifies duplicate and unmatched records. You can select to import the matched records, unmatched records or import all records.

### Match Rule Sets

A match rule set contains a logical set of match rules. Match rules define the criteria for the match process to determine whether two records are duplicates. Based on the requirements and the purpose of the match, the MDM Hub administrators configure match rule sets in the MDM Hub Console. The ad hoc match process uses a match rule set to identify the duplicate records.

For more information about Match Rule Sets, see the *Informatica Multidomain MDM Version 10.4 Hub Configuration Guide*.

### Matching Records

You can import data into Supplier 360 and perform an ad hoc match to compare new records with the existing records.

1. In the navigation pane, click **Ad Hoc Match**.  
The **Ad Hoc Match** page opens.
2. To select the file you want to import, drag and drop a CSV or an Excel file.

3. Optionally, you can click **Browse**.
4. Click **Next**.  
The **File Properties** page opens.
5. In the **File Properties** panel, specify the following ad hoc match properties:

Property	Description
Import from Sheet	Select the source file name. This option is applicable only for Excel files.
Import Data from Line	Select the row of the source file you want to import data from.
Has Column Headers	Select to display table headers for each column
Column Header in Row	Enter the header number of the row that you want a column.
Regional Settings	Select this option if records contain international characters.
Date Pattern	Date format for the date fields in the import file.
Decimal Separator	Decimal separator. Choose a comma or a period. Default is a period.
Thousand Separator	Thousand separator. Choose no separator, a comma, or a period. Default is no separator.

6. Click **Next**.  
The **Map Fields** page displays the source file data, the system suggested targets and the confidence indicators.
7. You can perform the following actions:
  - a. To accept the system suggested mapping, click **Accept**. The suggested mapping appears under the Business Entity.
  - b. To reject the system suggested mapping, click **Reject**.
  - c. To partially accept the system suggested mapping, select the checkbox next to the business entities and click **Accept**.
8. Expand the business entities or relationships to review the list of mapped target fields. You can filter the mapped target fields to view how the target fields were mapped.
  - a. Click the **Show** drop down list.  
A list of filter options appear. Select one of the following options:

Filter Option	Description
Mapped	Displays all mapped source columns and target fields.
Unmapped	Displays all unmapped source columns and target fields.
User Mapped	Displays all user mapped source columns and target fields.

Filter Option	Description
Auto Mapped	Displays all system mapped source columns and target fields.
All	Displays all source columns and target fields.

9. Click **Next**.  
The **Preview Match Results** screen appears.
10. To select the match rule set, click the **Match Rule Set** drop down.  
The source file data appears in the Preview Match Results panel.
11. You can preview the records before you import the file. Click **Show Preview**.
12. Click **Match**.  
The match job completes.
13. After the match process is complete, click the **My Jobs** window to display the match results.
14. To download the list of matched records as an Excel or CSV file, click **Download**.

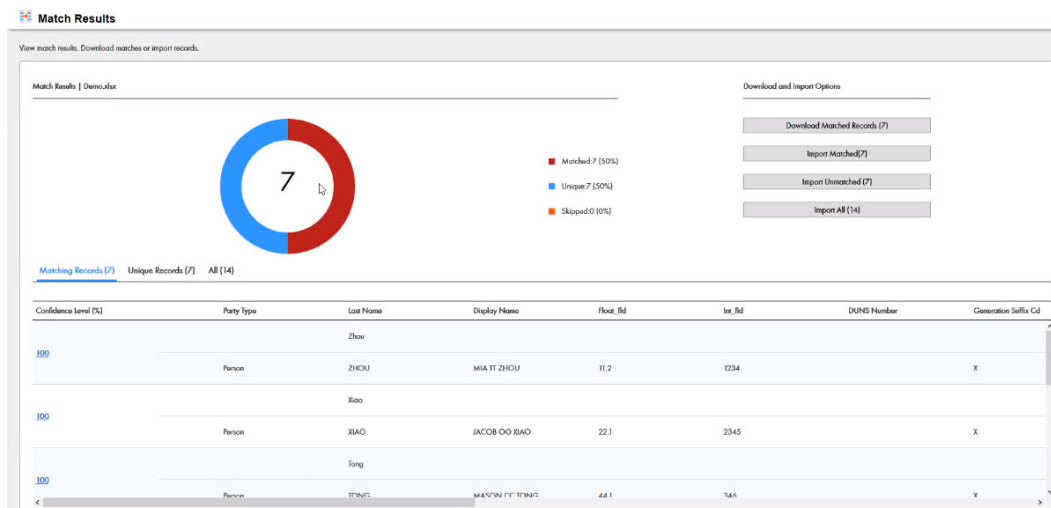
## Match Results

When you perform an ad hoc match, Supplier 360 generates the match results that contain details of the matched, unique, skipped and all records. You can review the match results to determine whether to import the system suggested records.

The match results show the following information:

- Number of matched records
- Number of unique records
- Skipped records
- All records

The following image shows the sample match results and a list of matched records:



The following table describes the tabs of the Match Results panel:

Tab Name	Description
Matching Records	Lists the input records and the existing matched records as matched pairs and assigns a confidence level. For example, an import record with the last name 'Smith' and an existing record with the last name 'Smith' are assigned a 100% confidence level and paired together. You can click the confidence level score to view the match rules applied.
Unique Records	Lists the unmatched input records.
Skipped	Lists the records that are not processed by the system.
All Records	Lists the matched, unmatched and skipped records.

You can download the match reports as a Microsoft Excel file or a CSV file that lists the matched, unique and all records.



# CHAPTER 10

## Reviewing a Supplier

This chapter includes the following topics:

- [Reviewing a Supplier Overview, 73](#)
- [Supplier Record Approval Process, 73](#)
- [Task Manager, 74](#)
- [Claiming a Task, 80](#)
- [Resolving a Task, 81](#)
- [Organizing Work on Tasks, 84](#)

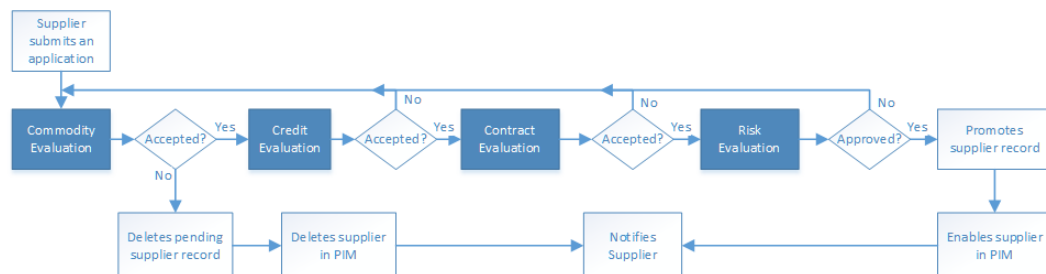
### Reviewing a Supplier Overview

The review process begins when a supplier submits an online application or a business user creates a supplier profile. A review process is an automated business process workflow that notifies business managers and data stewards when changes are ready for their review.

### Supplier Record Approval Process

The default process to approve a supplier includes four steps. Your administrator might set up a different process.

For example, the following diagram shows an overview of the default approval process that is used when a supplier submits an online application. The dark blue fill identifies the people activities.



The first people activity is the commodity evaluation, which requires a commodity manager to review the application. If the commodity manager accepts it, the application moves on to a credit evaluation and then a

contract evaluation. The last approval step is a risk evaluation. If the compliance manager believes the risk is acceptable, the manager approves the application. At any stage, a manager can reject the application. The process automatically sends the supplier representative an email with the results of the review.

The following table summarizes the people activities within the process, the required role, and the possible actions:

People Activity	Role Assigned	Possible Actions
Commodity Evaluation	CommodityManager	<ul style="list-style-type: none"> <li>- Accepts the application. This action sends the application onto the Credit Evaluation step.</li> <li>- Rejects the application. This action deletes the pending record containing the changes.</li> <li>- Disclaims the task with an explanation so that someone else can claim it.</li> </ul>
Credit Evaluation	FinanceManager	<ul style="list-style-type: none"> <li>- Accepts the application. This action sends the application onto the Contract Evaluation step.</li> <li>- Rejects the application with explanation. This action sends the application back to the Commodity Evaluation step.</li> <li>- Disclaims the task with an explanation so that someone else can claim it.</li> </ul>
Contract Evaluation	ContractManager	<ul style="list-style-type: none"> <li>- Accepts the application. This action sends the application onto the Risk Evaluation step.</li> <li>- Rejects the application with explanation. This action sends the application back to the Commodity Evaluation step.</li> <li>- Disclaims the task with an explanation so that someone else can claim it.</li> </ul>
Risk Evaluation	ComplianceManager	<ul style="list-style-type: none"> <li>- Approves the application. This action applies the changes to the master data.</li> <li>- Rejects the application with explanation. This action sends the application back to the Commodity Evaluation step.</li> <li>- Disclaims the task with an explanation so that someone else can claim it.</li> </ul>

## Task Manager

Use the Task Manager to organize, claim, and resolve tasks that are generated by review processes. You can also manage tasks by performing task administration actions, such as assigning, releasing, or editing tasks.

To go to the Task Manager, in the navigation bar, click **Task Manager**. Alternatively, you can click the title of a task from the task inbox in the **Home** page. In this case, the Task Manager displays the selected task and its associated record.

The following table describes the user interface elements of the Task Manager:

User Interface Element	Description
Selected list	<p>Performs task administration action on the selected tasks. To use the <b>Selected</b> list, select the check box beside multiple tasks.</p> <p>You can perform the following task administration actions:</p> <ul style="list-style-type: none"> <li>- Assign</li> <li>- Release</li> <li>- Edit</li> <li>- Claim</li> <li>- Task actions, such as Accept, Reject, or Disclaim</li> </ul> <p><b>Note:</b> The available task administration actions depend on your selected tasks and the ActiveVOS workflows.</p>
Custom filters	<p>Filters the tasks based on the filters that you select. To use custom filters, click the <b>Filters</b> icon, and then add filters.</p> <p>You can use any combination of the following filters:</p> <ul style="list-style-type: none"> <li>- Business Entity</li> <li>- Hierarchies</li> <li>- Creation Date</li> <li>- Due Date</li> <li>- Owner</li> <li>- Priority</li> <li>- Task Title</li> <li>- Task Type</li> </ul>
View	<p>Shows the list of tasks in the Details View or List View. To toggle the views, use the <b>Details View</b> or <b>List View</b> icons.</p>
Quick filter tabs	<p>Shows tasks based on the predefined filter criteria for the tab.</p> <p>Use one of the following filters:</p> <ul style="list-style-type: none"> <li>- My Assigned Tasks. Shows your open assigned tasks.</li> <li>- My Closed Tasks. Shows the tasks that you closed.</li> <li>- Available Tasks. Shows all unassigned tasks that are available to your user group.</li> <li>- All Assigned Tasks. Shows all the tasks that the users in your user group are assigned.</li> <li>- All Closed Tasks. Shows all the tasks that the users in your user group closed.</li> <li>- All Tasks. Shows all the closed, assigned, and unassigned tasks that are available to your user group.</li> <li>- Tasks Created by Me. Shows the tasks that you created.</li> </ul>
Search	<p>Searches the tasks for the search text.</p>

## Details View

The Details view displays a list of tasks and the record associated to the selected task. The tasks are filtered based on the quick filters. You can further filter the tasks by using custom filters and search terms.

The Details view contains the following panels:

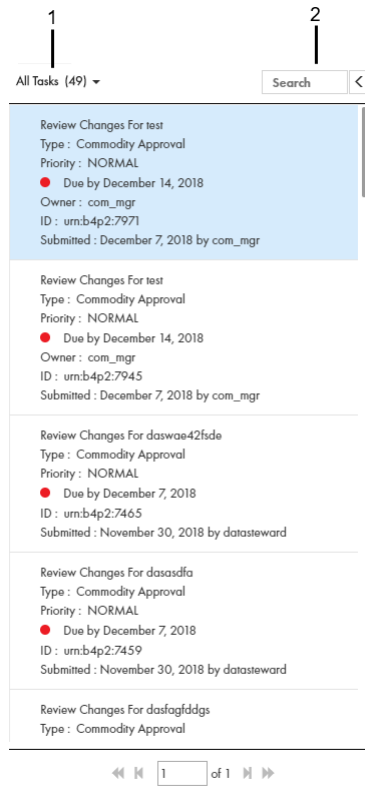
- Task panel
- Review panel

## Task Panel

The task panel lists tasks based on the quick filter, custom filters, and search term. You can only view the task panel in the Details view.

When you open the Task Manager from the navigation bar, the task panel displays all the tasks. When you open a task from the task inbox of the **Home** page, the task panel displays only the details of the selected task.

The following image shows the task panel of the Task Manager:



1. Quick filters
2. Search

The following table lists the user interface elements of the task panel :

User Interface Element	Description
Quick filters	Filters the tasks based on the predefined filter that you select. Use one of the following filters: <ul style="list-style-type: none"> <li>- My Open Tasks. Shows your open tasks.</li> <li>- My Closed Tasks. Shows the tasks that you closed.</li> <li>- All Tasks. Shows all the closed, claimed, and unclaimed tasks that are assigned to your user group.</li> <li>- All Unclaimed Tasks. Shows all the unclaimed tasks that are assigned to your user group.</li> <li>- All Closed Tasks. Shows all the tasks that the users in your user group closed.</li> <li>- All Claimed Tasks . Shows all the tasks that the users in your user group claimed.</li> </ul>
Search	Searches the displayed tasks for the specified text.

The following table lists the details that the task panel can display :

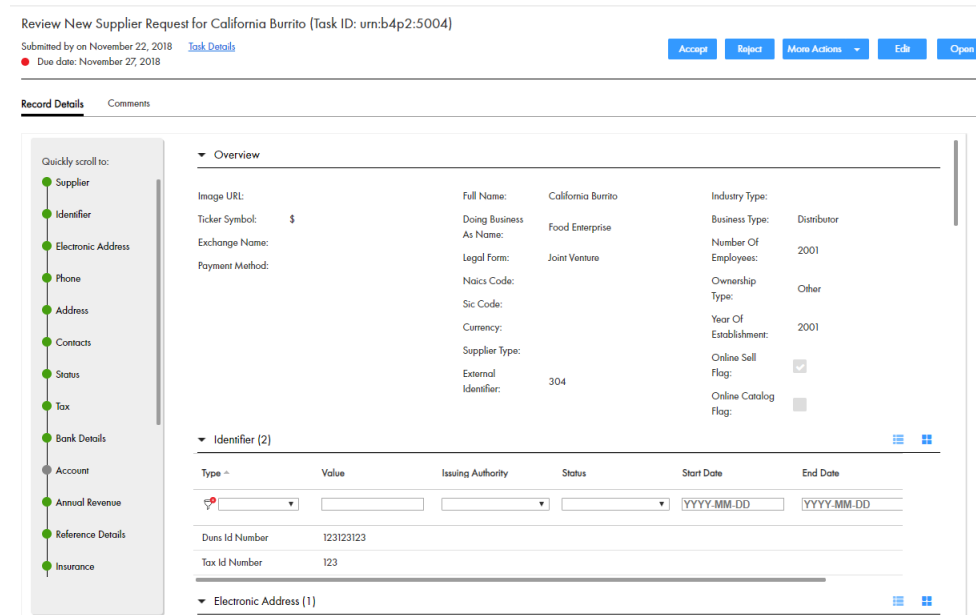
Task Detail	Description
Task Title	A link that displays a short description of the review task. To review the record and take action on the task, click the task title. The task opens in the Task Manager and displays the associated record in the review panel. If your role permits it, you can edit the record from this view before taking action on the task.
Type	Name of a people activity within the process.
Priority	Priority of the task. The task priority can be Low, Normal, or High. When generating tasks, the review process assigns the same priority to all tasks of the same type.
Task Status and Due Date	Status of the task and the date the task is due. Status of the task can be Open or Closed. When the task status is Open, you can view the record associated with the task. The review process calculates a default due date based on the task creation date plus a predefined time period. The due date of each task is prefixed with one of the following colored dots: <ul style="list-style-type: none"> <li>- Green. Indicates that the task is not overdue.</li> <li>- Red. Indicates that the task is overdue.</li> <li>- Amber. Indicates that the task will be overdue in the next 24 hours.</li> </ul>
Owner	Name of the signed-in user.
ID	Instance ID of the review process that generated the task.
Submitted Date and Creator	Name of the user who created the task, and the date on which the user created the task.

**Note:** If you and your colleagues require different task details, contact your MDM administrator. The MDM administrator can update the application to display the desired details.

## Task Manager Review Panel

Use the review panel to review the changed record, the comments added to the task, and the workflow diagram. The content of the review panel differs based on the type of change that was made to the record.

The following image shows a record in the review panel:



The following table describes the elements in the review panel:

Element	Description
Record Details	Displays the details of the record associated with the task.
Comments	Displays a list of comments added to the task.
Workflow Diagram	Displays a graphical representation of the process flow associated with the task. You can view the workflow diagram only if you have the ActiveVOS abAdmin role assigned.
Task Details	Displays the task details in edit mode.
Actions	Actions that you can perform on the task. The possible actions depend on the task definitions in the review process. Sample actions can be Approve, Reject, and Disclaim.
More Actions	Additional actions that you can perform on the task.
Edit	Opens the record in edit mode.
Open	Opens the record in a separate tab.

## List View

The List View displays a list of tasks filtered based on the quick filters. You can further filter the tasks by using custom filters and search terms.

The following image shows the Task Manager with a task selected in the List View:

Task Manager

My Assigned Tasks (10) My Closed Tasks (5) Available Tasks (207) All Assigned Tasks (10) All Closed Tasks (7) All Tasks (224) Tasks Created by Me (0)

My Assigned Tasks (10)

ID	Task Title	Type	Priority	Creation Date	Due Date	Owner
urn:b4p2:11430	Review changes in SMITH, JANE - create	Review No approve	Normal	2019-12-10	● 2019-12-17	mgr2
urn:b4p2:11427	Review changes in HAROLD, DAVE - create	Review No approve	Normal	2019-12-10	● 2019-12-17	mgr2
urn:b4p2:11424	Review changes in ALLEN, JENNIFER - create	Review No approve	Normal	2019-12-10	● 2019-12-17	mgr2
urn:b4p2:11209	Review changes in MAYOR, DAVID - create	Review No approve	Normal	2019-12-02	● 2019-12-09	mgr2
urn:b4p2:11206	Review changes in TAYES, JOHNNY - create	Review No approve	Normal	2019-12-02	● 2019-12-09	mgr2
urn:b4p2:11203	Review changes in MILLS, TRACY - create	Review No approve	Normal	2019-12-02	● 2019-12-09	mgr2
urn:b4p2:10909	Review changes in GOEF, PAUL - create	Review No approve	Normal	2019-11-25	● 2019-12-02	mgr2
urn:b4p2:10906	Review changes in WILLIAMSON, BRIAN - create	Review No approve	Normal	2019-11-25	● 2019-12-02	mgr2

1 - 10 of 10 tasks

Tasks per page: 25

The following table lists the details that the task list can display:

Task Detail	Description
Task Title	A link that displays a short description of the review task. To review the record and take action on the task, click the task title. The task opens in the Task Manager and displays the associated record in the review panel. If your role permits it, you can edit the record from this view before taking action on the task.
Type	Name of a people activity within the process.
Priority	Priority of the task. The task priority can be Low, Normal, or High. When generating tasks, the review process assigns the same priority to all tasks of the same type.
Task Status and Due Date	<p>Status of the task and the date the task is due.</p> <p>Status of the task can be Open or Closed. When the task status is Open, you can view the record associated with the task.</p> <p>The review process calculates a default due date based on the task creation date plus a predefined time period.</p> <p>The due date of each task is prefixed with one of the following colored dots:</p> <ul style="list-style-type: none"> <li>- Green. Indicates that the task is not overdue.</li> <li>- Red. Indicates that the task is overdue.</li> <li>- Amber. Indicates that the task will be overdue in the next 24 hours.</li> </ul>
Owner	Name of the signed-in user.
ID	Instance ID of the review process that generated the task.
Submitted Date and Creator	Name of the user who created the task, and the date on which the user created the task.

**Note:** If you require different task details, contact your MDM administrator. The MDM administrator can update the application to display the relevant task details.

## Potential Owners

A potential owner is an user that belongs to a user group that can work on the task. The potential owners for tasks depend on the selected tasks and your task definitions.

To work on a task, you claim the task. You can only claim tasks for which you are a potential owner. The **Available Tasks** tab of the Task Manager shows all the unassigned tasks for which you are a potential owner.

You can assign or reassign tasks to users who are potential owners of the task. When you assign or reassign multiple tasks, the possible assignees are the potential owners shared by all the selected tasks.

For example, you might want to reassign a review task for the Philips Business record and a merge task for the Phillips Private record. The potential owners for review tasks are users assigned the Commodity Manager role, Finance Manager role, or Contract Manager role. The potential owners for merge tasks are users assigned the Contract Manager role and Commodity Manager role. When reassigning these tasks together, the potential owners are users assigned the Contract Manager role or Commodity Manager role.

If you are assigning or reassigning a variety of tasks, there might be no potential owners shared by all the tasks. To increase the amount potential owners, manage tasks of the same task type. For example, you might want to manage merge tasks.

**Note:** If you and your colleagues require different user roles, task definitions, workflow triggers, or ActiveVOS workflows, contact your MDM administrator. The MDM administrator can change your configurations.

## Potential Task Actions

A potential task action is an action that can be performed on the task. The potential task actions for tasks depend on the selected tasks and your ActiveVOS workflows.

When you are working on multiple tasks, the potential task actions are the task actions shared by all the selected tasks. For example, you might be reviewing merge and unmerge tasks related to the Philips Business record. The potential task actions for merge tasks are Merge, Cancel, and Disclaim. The potential task actions for unmerge tasks are Unmerge, Cancel, and Disclaim. When you take an action on these tasks together, the potential task actions are Cancel and Disclaim.

If you reviewing a variety of tasks, there might be no potential task actions shared by all the tasks. To increase the amount of task actions, review tasks of the same task type. For example, you might want to review and take an action on merge tasks.

**Note:** If you and your colleagues require different user roles, task definitions, workflow triggers, or ActiveVOS workflows, contact your MDM administrator. The MDM administrator can change your configurations.

## Claiming a Task

Multiple users can share the same reviewer role. To work on a task, you must claim the task to ensure that other users cannot work on the task while you work on it. Before you can claim a task, check for comments or attachments.

1. Click **Task Manager**.  
The task panel contains a list of tasks.
2. Click **Available Tasks**.  
The task panel lists all the unassigned tasks for your user group.



3. Select a task that you want to claim.  
The record appears in the review panel.
4. Optionally, review the task details, comments, attachments.
  - a. Click the **Comments** tab, and then review the comments.
  - b. Click **Task Details**.
  - c. Review the details of the task, such as the priority and due date.
  - d. Download attachments in the **File Attachments** section.
  - e. Click **Cancel**.
5. Click **Claim**.

The task panel updates. The task appears in the **My Assigned Tasks** tab. Your user name appears in the **Owner** field of the task.

## Resolving a Task

You resolve a task by reviewing the new or changed record and then taking an action. The possible actions depend on the task definitions in the review process.

### Reviewing an Edited Record

When you open a task to review an edited record, the fields that contain edited values are marked.

In the MDM Hub Store, the proposed edits are contained in a cross-reference record that is set to the pending state.

1. In the task inbox of the **Home** page, click a task that is a request to review an edited record.  
The record opens in the review panel of the Task Manager.  
**Note:** If you open an unassigned task, be sure to claim it before you start work.
2. Optionally, review the task details, comments, attachments.
  - a. Click the **Comments** tab, and then review the comments.
  - b. Click **Task Details**.
  - c. Review the details of the task, such as the priority and due date.
  - d. Download attachments in the **File Attachments** section.
  - e. Click **Cancel**.
3. Look for highlighted fields and decide if the edits are valid.
4. If you see a typographical error or an incorrect value for which you know the correct value, click **Edit**, and edit the field.  
**Note:** The next step depends on whether you have enough information to resolve the task or if you think someone else should assess it.

5. To resolve the task, click an appropriate action button, or click **More Actions** and select one of the following actions:

Action	Description
Approve	If you agree with the edits and the task type permits you to approve changes, click <b>Approve</b> . The ActiveVOS® Server marks the related Final Review people activity as completed and performs the next activity in the process.
Escalate	If you agree with the edits, but the task type does not permit approval at this point in the workflow, click <b>Escalate</b> . The ActiveVOS Server marks the related Review No Approve people activity as completed and performs the next activity in the process.
Reject	If you disagree with the one or more edits, click <b>Reject</b> and type an explanation in the Comment box. The ActiveVOS Server notifies the person who edited the record. <b>Note:</b> If a source system updates the rejected record, the record goes through the approval process again.
<Other>	If you see other options in the menu, then your organization uses a custom business process. If the purpose of the option is not clear and your role permits access to the ActiveVOS console, you can open the process to understand the workflow. Otherwise, contact the person who created the business process.

The task is closed.

6. To change the ownership of the task without resolving the task, click an appropriate action button, or click **More Actions** and select one of the following actions:

Action	Description
Reassign	To ask another person to review the proposed changes, click <b>Reassign</b> , select the user, and type an explanation in the Comment box. The task is reassigned to the selected person. <b>Note:</b> If this option is not available, click <b>Task Details</b> and select the user from the <b>Assignee</b> list.
Disclaim	To return the task to the pool of available tasks, click <b>Disclaim</b> and type an explanation in the Comment box. Someone with the same role needs to take action on the task. <b>Note:</b> If this option is not available, use the <b>Release</b> button.
Release	To return the task to the pool of available tasks, click <b>Release</b> and type an explanation in the Comment box. <b>Note:</b> The release action is a task administration action. To release multiple tasks, from the <b>Selected</b> list, select <b>Release</b> .

The task remains open, but is no longer assigned to you.

7. If prompted, add comments or attachments to provide additional information.

**Note:** Whether you are prompted and required to add a comment or attachment depends on the Data Director configuration. A red line appears to indicate required fields.

## Reviewing a New Record

When you open a task to review a new record, all field values in the record need to be validated. If you are one reviewer in a progressive multiple step review process, validate only the fields that you are responsible for validating.

In the MDM Hub Store, the parent record and child records are in the pending state until the new record is approved.

1. In the task inbox of the **Home** page, click a task that is a request to review a new record.

The record opens in the review panel of the Task Manager.

**Note:** If you open an unassigned task, be sure to claim it before you start work.

2. Optionally, review the task details, comments, attachments.
  - a. Click the **Comments** tab, and then review the comments.
  - b. Click **Task Details**.
  - c. Review the details of the task, such as the priority and due date.
  - d. Download attachments in the **File Attachments** section.
  - e. Click **Cancel**.
3. Determine if the values in the record meet your business requirements.

**Note:** The next step depends on whether you have enough information to resolve the task or you think someone else should assess it.

4. To resolve the task, click an appropriate action button, or click **More Actions** and select one of the following actions:

Action	Description
Approve	If you think the record is acceptable, and the task type permits you to approve it, click <b>Approve</b> . The ActiveVOS Server marks the related Final Review people activity as completed and performs the next activity in the process.
Escalate	If you think the record is acceptable, but the task type does not permit approval at this point in the workflow, click <b>Escalate</b> . The ActiveVOS Server marks the related Review No Approve people activity as completed and performs the next activity in the process.
Reject	If you disagree with the one or more values, click <b>Reject</b> and type an explanation in the Comment box. The ActiveVOS Server notifies the person who added the record. <b>Note:</b> If a source system updates the rejected record, the record goes through the approval process again.
<Other>	If you see other options in the menu, then your organization uses a custom business process. If the purpose of the option is not clear and your role permits access to the ActiveVOS console, you can open the process to understand the workflow. Otherwise, contact the person who created the business process.

The task is closed.

- To change the ownership of the task without resolving the task, click an appropriate action button, or click **More Actions** and select one of the following actions:

Action	Description
Reassign	To ask another person to review the proposed changes, click <b>Reassign</b> , select the user, and type an explanation in the Comment box. The task is reassigned to the selected person. <b>Note:</b> If this option is not available, click <b>Task Details</b> and select the user from the <b>Assignee</b> list.
Disclaim	To return the task to the pool of available tasks, click <b>Disclaim</b> and type an explanation in the Comment box. Someone with the same role needs to take action on the task. <b>Note:</b> If this option is not available, use the <b>Release</b> button.
Release	To return the task to the pool of available tasks, click <b>Release</b> and type an explanation in the Comment box. <b>Note:</b> The release action is a task administration action. To release multiple tasks, from the <b>Selected</b> list, select <b>Release</b> .

The task remains open, but is no longer assigned to you.

- If prompted, add comments or attachments to provide additional information.

**Note:** Whether you are prompted and required to add a comment or attachment depends on the Data Director configuration. A red line appears to indicate required fields.

## Approving a Supplier Application

A Compliance Manager has the authority to approve a supplier application. After the manager selects **Approve** from the list of task actions, the supplier representative receives an email containing the decision. On the Supplier Portal, the application displays the result of the qualification process.

Approved suppliers receive a personalized welcome email based on a template. The template can be customized to suit your organization. If you are interested in seeing a copy of the acceptance email sent to suppliers, contact your administrator.

## Declining a Supplier Application

A Compliance Manager has the authority to decline a supplier application. After the manager selects **Reject** from the list of task actions, the supplier representative receives a email containing the decision. On the Supplier Portal, the application displays the result of the qualification process.

The supplier representative receives a personalized email based on a template. The template can be customized to suit your organization. If you are interested in seeing a copy of the rejection email sent to suppliers, contact your administrator.

## Organizing Work on Tasks

When you have a long list of tasks, you can organize tasks by sorting and filtering the list, changing task properties, and assigning tasks to others.

For example, you might want to work on the tasks that have the highest priority or on the tasks that are due soonest. After you filter the list of tasks, you might find tasks that need a higher priority or that can be postponed. You can edit the task properties to better reflect the urgency within the business to resolve tasks.

And, if you have the authority to assign tasks to managers, you can assign the task to a manager from the task properties.

## Editing a Task

As you work with tasks, you might decide that some task properties need to be changed. For example, if changes are made to the record of an important client, you might want to increase the priority of the review task. Or, if you plan to be away and want to finish a set of tasks before you leave, you can change the due dates for the tasks to represent a date before your planned absence.

1. Click **Task Manager**.  
The task panel contains a list of tasks.
2. In the task panel, select the task you want to edit.
3. In the review panel, click **Task Details**.

The following image shows the **Task Details** dialog box:

4. Edit one or more of the following fields to change the task properties:

Field	Description
Task Title	Enter a title that is more meaningful to you. A good title includes at least the name of the record and the change that initiated the review.
Priority	Select a priority that reflects the urgency within the business to resolve this change.

Field	Description
Due Date	Select a due date that reflects the urgency within the business to resolve the change.
Assignee	Reassign this task to someone else.
File Attachment	Attach files to provide additional information about the task. Attachments appear in the <b>Task Details</b> dialog box. <b>Note:</b> The <b>File Attachment</b> field is available only if the task supports attachments.
Add Comment	Add comments to explain edits to the task properties and to track questions and answers about the task. Comments appear in the <b>Comments</b> tab.
Assign Back to Pool	Return the task to the pool of unassigned tasks so that other users can claim the task. <b>Note:</b> The <b>Assign Back to Pool</b> button is available only if the task belongs to another user.

5. Click **Save**.

## Assigning Your Task to Another User

If the **Assignee** list is enabled in the **Edit Task** dialog box, you can reassign tasks.

**Note:** If you want to enable reassignments, contact your MDM administrator. The MDM administrator must implement a business process management (BPM) adapter that supports reassignments.

1. Click **Task Manager**.

The task panel contains a list of tasks.

2. Select **My Assigned Tasks**.

The task panel lists your assigned tasks.

3. In the task panel, select the task that you want to assign to another user.

The record appears in the review panel.

4. To provide additional information about the task, click **Task Details**, and then add a comment or a file attachment.

**Note:** If you do not have the options for comments or attachments, contact your MDM administrator to request that they enable comments and attachments.

5. To assign the task, select the user from the **Assignee** list.

6. Click **Save**.

## Assigning a Task Back to the Pool

When a user in your user group is not available, you can send the user's tasks to the pool of unassigned tasks so that other users can claim them. The option to assign the tasks back to the pool is available only if the task belongs to another user.

1. Click **Task Manager**.

The task panel contains a list of tasks.

2. In the task panel, select the task that you want to send to the pool.

The record appears in the review panel

3. In the review panel, click **Task Details**.
4. Click **Assign Back to Pool**.

## Disclaiming a Task

If you claim or are assigned a task that you feel would be better handled by someone else, you can disclaim the task. Disclaimed tasks return to the pool of unassigned tasks.

1. Click **Task Manager**.  
The task panel contains a list of tasks.
2. In the task panel, select an assigned task that you want to disclaim.  
The record appears in the review panel
3. In the review panel, click **More Actions > Disclaim**.
4. If prompted, add comments or attachments to provide additional information.

**Note:** Whether you are prompted and required to add a comment or attachment depends on the Data Director configuration. A red line appears to indicate required fields.

# CHAPTER 11

## Reviewing Multiple Suppliers

This chapter includes the following topics:

- [Reviewing Multiple Suppliers Overview, 88](#)
- [Claiming Tasks, 89](#)
- [Resolving Tasks, 89](#)
- [Organizing Work on Tasks, 96](#)

### Reviewing Multiple Suppliers Overview

You can review multiple suppliers by performing task administration actions. You can claim, assign, release, or edit tasks. Or, you can take an action on tasks, such as accept, reject, or disclaim. For example, you might want to release tasks claimed by an user on vacation or edit the priority of tasks related to the John Smith record.

The task administration actions that you can perform depend on your role and task definitions. Users assigned the Task Administrator role can manage all tasks, while other users can only manage tasks available to their user role.

If you are assigned multiple roles, you might be able to perform more task administration actions. For example, if you are assigned the Data Steward role and the Task Administrator role. You can manage tasks available to Data Stewards, and you can also manage all tasks as a task administrator.

The following table lists the task administration actions available to user roles:

User Role	Task Administration Actions
Task Administrator	Users can perform the following task administration actions on all tasks: <ul style="list-style-type: none"><li>- Assign</li><li>- Release</li><li>- Edit</li></ul>
Other user roles	Users can perform the following task administration actions on tasks available to their user role: <ul style="list-style-type: none"><li>- Claim</li></ul> Users can perform the following task administration actions on tasks based on whether they are assigned the tasks: <ul style="list-style-type: none"><li>- Release</li><li>- Edit</li><li>- Task actions, such as Accept, Reject, or Disclaim</li></ul> <b>Note:</b> The available task actions depend on the selected tasks and your ActiveVOS workflows.



**Note:** If you and your colleagues require different user roles, task definitions, workflow triggers, or ActiveVOS workflows, contact your MDM administrator. The MDM administrator can change your configurations.

## Claiming Tasks

Claim tasks that you want to work on. This ensures that other users cannot work on the tasks while you work on them.

1. Click **Task Manager**.  
The task panel contains a list of tasks.
2. Click **Available Tasks**.  
The task panel lists all the unassigned tasks for your user group.
3. Optionally, to find tasks to manage, use custom filters or search.
  - a. Click the **Filters** icon, and then add filters.
  - b. In the search box, enter a search term, and then click the search icon.
4. Select a task and review the task details, comments, and attachments.
  - a. Click the **Comments** tab, and then review the comments.
  - b. Click **Task Details**.
  - c. Review the details of the task, such as the priority and due date.
  - d. Download attachments in the **File Attachments** section.
  - e. Click **Cancel**.
5. Repeat step [4](#) to find additional tasks that you want to claim.
6. Select the check box beside the tasks that you want to manage.  
The **Selected** list appears.
7. From the **Selected** list, select **Claim**.

The task panel updates. The tasks appear in the **My Assigned Tasks** tab. Your user name appears in the **Owner** field of the tasks.

## Resolving Tasks

You can resolve tasks by reviewing tasks and then taking an action. The possible actions that you can perform depends on the selected tasks and your ActiveVOS workflows.

When you resolve multiple tasks, you can only take an action that is shared by all the selected tasks. To increase the amount of possible actions that you can perform, review tasks of the same task type.

For more information about the possible actions, see [“Potential Task Actions” on page 80](#).

## Reviewing Edited Records

Review edited records and then resolve the tasks by taking an action. If you cannot resolve the tasks, disclaim the tasks to return the tasks to the pool of available tasks. Or, if you know another user who can resolve the tasks, reassign the tasks to that user.

Before you begin, claim the tasks that you want to work on. For more information, see [“Claiming Tasks” on page 89](#).

When you review tasks for edited tasks, the fields that contain edited values are marked.

1. Click **Task Manager**.  
The task panel contains a list of tasks.
2. Click **My Assigned Tasks**.  
The task panel lists your assigned tasks.
3. Optionally, to find tasks to manage, use custom filters or search.
  - a. Click the **Filters** icon, and then add filters.
  - b. In the search box, enter a search term, and then click the search icon.
4. Select a task and review the edited record in the review panel.
  - a. Look for highlighted fields and decide if the edits are valid.
  - b. If you see a typographical error or an incorrect value for which you know the correct value, click **Edit**, and edit the field.
5. Repeat step [4](#) for each edited record that you want to review.
6. Select the check box beside the tasks for which you want to take an action.  
For example, you select the check box beside the tasks with edits that you want to approve.  
The **Selected** list appears.
7. From the **Selected** list, click **More Actions....**  
The **More Actions...** dialog box appears.
8. To resolve the tasks, select one of the following actions:  
**Note:** Only the potential task actions shared by all the tasks appear. For more information, see [“Potential Task Actions” on page 80](#).

Action	Description
Approve	If you agree with the edits and the task type permits you to approve changes, click <b>Approve</b> . The ActiveVOS® Server marks the related Final Review people activity as completed and performs the next activity in the process.
Send Back	If you require more information to review the edits, click <b>Send Back</b> . Type an explanation in the Comment box.

Action	Description
Reject	If you disagree with the one or more edits, click <b>Reject</b> and type an explanation in the Comment box. The ActiveVOS Server notifies the person who edited the record.
<Other>	If you see other options in the menu, then your organization uses a custom business process. If the purpose of the option is not clear and your role permits access to the ActiveVOS console, you can open the process to understand the workflow. Otherwise, contact the person who created the business process.

The tasks are closed.

- To change the ownership of the tasks without resolving the tasks, select one of the following actions:

**Note:** Only the potential task actions shared by all the tasks appear. For more information, see [“Potential Task Actions” on page 80](#).

Action	Description
Reassign	To ask another person to review the proposed changes, click <b>Reassign</b> , select the user, and type an explanation in the Comment box. The tasks are reassigned to the selected person. <b>Note:</b> If this option is not available, close the <b>More Actions...</b> dialog box. From the <b>More Actions...</b> , select <b>Edit</b> , and then select the user from the <b>Assignee</b> list.
Disclaim	To return the tasks to the pool of available tasks, click <b>Disclaim</b> and type an explanation in the Comment box. Users with the same role can take action on the tasks.

The tasks remain open, but are no longer assigned to you.

- If prompted, add comments or attachments to provide additional information.

**Note:** Whether you are prompted and required to add a comment or attachment depends on the Data Director configuration. A red line appears to indicate required fields.

The task panel updates. Based on your changes, some tasks might not appear in the task panel.

## Reviewing New Records

Review new records and then resolve the tasks by taking an action. If you cannot resolve the tasks, disclaim the tasks to return the tasks to the pool of available tasks. Or, if you know another user who can resolve the tasks, reassign the tasks to that user.

Before you begin, claim the tasks that you want to work on. For more information, see [“Claiming Tasks” on page 89](#).

When you review tasks for new records, all field values in the new record need to be validated.

- Click **Task Manager**.

The task panel contains a list of tasks.

- Click **My Assigned Tasks**.

The task panel lists your assigned tasks.

- Optionally, to find tasks to manage, use custom filters or search.

- Click the **Filters** icon, and then add filters.

- In the search box, enter a search term, and then click the search icon.

- Select a task and determine if the values in the record meet your business requirements.

5. Repeat step [4](#) for each new record that you want to review.
6. Select the check box beside the tasks for which you want to take an action.  
For example, you select the check box beside the tasks for new records that you want to approve.  
The **Selected** list appears.
7. From the **Selected** list, click **More Actions....**  
The **More Actions...** dialog box appears.
8. To resolve the tasks, select one of the following actions:

**Note:** Only the potential task actions shared by all the tasks appear. For more information, see [“Potential Task Actions” on page 80](#).

Action	Description
Approve	If you agree with the edits and the task type permits you to approve changes, click <b>Approve</b> . The ActiveVOS <sup>®</sup> Server marks the related Final Review people activity as completed and performs the next activity in the process.
Send Back	If you require more information to review the edits, click <b>Send Back</b> . Type an explanation in the Comment box.
Reject	If you disagree with the one or more edits, click <b>Reject</b> and type an explanation in the Comment box. The ActiveVOS Server notifies the person who edited the record.
<Other>	If you see other options in the menu, then your organization uses a custom business process. If the purpose of the option is not clear and your role permits access to the ActiveVOS console, you can open the process to understand the workflow. Otherwise, contact the person who created the business process.

The tasks are closed.

9. To change the ownership of the tasks without resolving the tasks, select one of the following actions:

**Note:** Only the potential task actions shared by all the tasks appear. For more information, see [“Potential Task Actions” on page 80](#).

Action	Description
Reassign	To ask another person to review the proposed changes, click <b>Reassign</b> , select the user, and type an explanation in the Comment box. The tasks are reassigned to the selected person. <b>Note:</b> If this option is not available, close the <b>More Actions...</b> dialog box. From the <b>More Actions...</b> , select <b>Edit</b> , and then select the user from the <b>Assignee</b> list.
Disclaim	To return the tasks to the pool of available tasks, click <b>Disclaim</b> and type an explanation in the Comment box. Users with the same role can take action on the tasks.

The tasks remain open, but are no longer assigned to you.

10. If prompted, add comments or attachments to provide additional information.

**Note:** Whether you are prompted and required to add a comment or attachment depends on the Data Director configuration. A red line appears to indicate required fields.

The task panel updates. Based on your changes, some tasks might not appear in the task panel.

# Reviewing Merge Tasks

Review merge tasks and then resolve the tasks by taking an action. If you cannot resolve the tasks, disclaim the tasks to return the tasks to the pool of available tasks. Or, if you know another user who can resolve the tasks, reassign the tasks to that user.

Before you begin, claim the tasks that you want to work on. For more information, see ["Claiming Tasks" on page 89](#).

When you review a merge task, the primary record appears beside the records that are selected for the merge.

1. Click **Task Manager**.  
The task panel contains a list of tasks.
2. Click **My Assigned Tasks**.  
The task panel lists your assigned tasks.
3. Optionally, to find tasks to manage, use custom filters or search.
  - a. Click the **Filters** icon, and then add filters.
  - b. In the search box, enter a search term, and then click the search icon.
4. Select a merge task, and then review the merge task and determine if the merge is valid. The fields that appear in the merge preview are highlighted.
5. If required, make changes to the proposed merge task.
  - a. To change the proposed merge task, perform any of the following tasks:

Task	Procedure
Add records that you want to merge.	Click <b>Add Candidate</b> . You can search for records and add the records to the view.
Remove records that you do not want to merge.	From the <b>Actions</b> menu, select an option: <ul style="list-style-type: none"><li>- <b>Remove Candidate</b>. Removes a manually added record from the review panel.</li><li>- <b>Not a Match</b>. Removes a system matched record from the review panel and dissociates it as a match of the target record.</li></ul>
Finalize the best version of the truth.	Select the field with the correct value or enter the correct value in the <b>Merge Preview</b> column.

- b. Click **Update**.  
The merge task is updated.
6. Repeat steps [4](#) through [5](#) for each merge task that you want to review.
7. Select the check box beside the tasks for which you want to take an action.  
For example, you select the check box beside the merge tasks that you want to approve.  
The **Selected** list appears.
8. From the **Selected** list, click **More Actions....**  
The **More Actions...** dialog box appears.
9. To resolve the tasks, select one of the following actions:

**Note:** Only the potential task actions shared by all the tasks appear. For more information, see [“Potential Task Actions” on page 80](#).

Option	Description
Merge	If you agree with the merge proposals and the task types permits you to approve changes, click <b>Merge</b> . The ActiveVOS Server marks the related Merge people activity as completed and performs the next activity in the process.
Cancel	If you disagree with the merge proposals, click <b>Cancel</b> and type an explanation in the Comment box. The ActiveVOS Server notifies the person who proposed the merge.
<Other>	If you see other options, then your organization uses a custom business process. If the purpose of the option is not clear and your role permits access to the ActiveVOS console, you can open the process to understand the workflow. Otherwise, contact your MDM administrator.

The tasks are closed.

- To change the ownership of the tasks without resolving the tasks, select one of the following actions:

**Note:** Only the potential task actions shared by all the tasks appear. For more information, see [“Potential Task Actions” on page 80](#).

Action	Description
Reassign	To ask another person to review the proposed changes, click <b>Reassign</b> , select the user, and type an explanation in the Comment box. The tasks are reassigned to the selected person. <b>Note:</b> If this option is not available, close the <b>More Actions...</b> dialog box. From the <b>More Actions...</b> , select <b>Edit</b> , and then select the user from the <b>Assignee</b> list.
Disclaim	To return the tasks to the pool of available tasks, click <b>Disclaim</b> and type an explanation in the Comment box. Users with the same role can take action on the tasks.

The tasks remain open, but are no longer assigned to you.

- If prompted, add comments or attachments to provide additional information.

**Note:** Whether you are prompted and required to add a comment or attachment depends on the Data Director configuration. A red line appears to indicate required fields.

The task panel updates. Based on your changes, some tasks might not appear in the task panel.

## Reviewing Unmerge Tasks

Review unmerge tasks and then resolve the tasks by taking an action. If you cannot resolve the tasks, disclaim the tasks to return the tasks to the pool of available tasks. Or, if you know another user who can resolve the tasks, reassign the tasks to that user.

Before you begin, claim the tasks that you want to work on. For more information, see [“Claiming Tasks” on page 89](#).

When you review an unmerge task, a preview shows the result of the unmerge.

- Click **Task Manager**.  
The task panel contains a list of tasks.
- Click **My Assigned Tasks**.  
The task panel lists your assigned tasks.

3. Optionally, to find tasks to manage, use custom filters or search.
  - a. Click the **Filters** icon, and then add filters.
  - b. In the search box, enter a search term, and then click the search icon.
4. Select an unmerge task, and then review the unmerge preview and determine if the unmerge is warranted. The fields that appear in the preview are highlighted.
5. Repeat step [4](#) for each unmerge task that you want to review.
6. Select the check box beside the tasks for which you want to take an action.  
For example, you select the check box beside the unmerge tasks that you want to approve.  
The **Selected** list appears.
7. From the **Selected** list, click **More Actions....**  
The **More Actions...** dialog box appears.
8. To resolve the tasks, select one of the following actions:

**Note:** Only the potential task actions shared by all the tasks appear. For more information, see [“Potential Task Actions” on page 80](#).

Option	Description
Unmerge	If you agree with the unmerge proposals and the task types permits you to approve changes, click <b>Unmerge</b> . The ActiveVOS Server marks the related Unmerge people activity as completed and performs the next activity in the process.
Cancel	If you disagree with the unmerge proposals, click <b>Cancel</b> and type an explanation in the Comment box. The ActiveVOS Server notifies the person who proposed the unmerge.
<Other>	If you see other options, then your organization uses a custom business process. If the purpose of the option is not clear and your role permits access to the ActiveVOS console, you can open the process to understand the workflow. Otherwise, contact your MDM administrator.

The tasks are closed.

9. To change the ownership of the tasks without resolving the tasks, select one of the following actions:

**Note:** Only the potential task actions shared by all the tasks appear. For more information, see [“Potential Task Actions” on page 80](#).

Action	Description
Reassign	To ask another person to review the proposed changes, click <b>Reassign</b> , select the user, and type an explanation in the Comment box. The tasks are reassigned to the selected person. <b>Note:</b> If this option is not available, close the <b>More Actions...</b> dialog box. From the <b>More Actions...</b> , select <b>Edit</b> , and then select the user from the <b>Assignee</b> list.
Disclaim	To return the tasks to the pool of available tasks, click <b>Disclaim</b> and type an explanation in the Comment box. Users with the same role can take action on the tasks.

The tasks remain open, but are no longer assigned to you.

10. If prompted, add comments or attachments to provide additional information.

**Note:** Whether you are prompted and required to add a comment or attachment depends on the Data Director configuration. A red line appears to indicate required fields.

The task panel updates. Based on your changes, some tasks might not appear in the task panel.

# Organizing Work on Tasks

You can organize tasks by assigning tasks to users, reassigning tasks to other users, or releasing tasks to the pool of available tasks. Also, you can edit the details of tasks, including the task title, due date, priority, comments, and attachments.

For example, you might want to reassign tasks that are assigned to an user on vacation to another user. Or, you might want to change the priority of tasks related to John Smith to high priority.

## Assigning Tasks

Assign tasks to users who can work on the tasks. For example, you might want to assign tasks related to the Baker Foods record to a user with knowledge about the record.

1. Click **Task Manager**.  
The task panel contains a list of tasks.
2. Click **Available Tasks**.  
The task panel lists all the unassigned tasks for your user group.
3. Optionally, to find tasks to manage, use custom filters or search.
  - a. Click the **Filters** icon, and then add filters.
  - b. In the search box, enter a search term, and then click the search icon.
4. Select the check box beside the tasks that you want to manage.  
The **Selected** list appears.
5. From the **Selected** list, select **Assign**.  
The **Assign** dialog box appears.
6. From the **Assignee** list, select a user who you want to assign the tasks.  
**Note:** The **Assignee** list contains the potential owners shared by all selected tasks. For more information, see [“Potential Owners” on page 80](#).
7. Optionally, add a comment.
8. Click **Assign**.

The task panel updates. The tasks appear in the **My Open Tasks** tab for the assigned user. The user name of the assignee appears in the **Owner** field of the tasks.

## Reassigning Tasks

Reassign tasks to other users who can work on the tasks. For example, you might want to reassign your tasks to another user. If you are a task administration, you might want to reassign tasks claimed by a user that is unable to work on the tasks. You can only reassign tasks to users who are potential owners of the tasks.

1. Click **Task Manager**.  
The task panel contains a list of tasks.
2. To reassign your assigned tasks, click **My Assigned Tasks**.  
The task panel lists all your assigned tasks.
3. To reassign assigned tasks, click **All Assigned Tasks**.  
The task panel lists all assigned tasks.



4. Optionally, to find tasks to manage, use custom filters or search.
  - a. Click the **Filters** icon, and then add filters.
  - b. In the search box, enter a search term, and then click the search icon.
5. Select the check box beside the tasks that you want to manage.

The **Selected** list appears.
6. From the **Selected** list, select **Assign**.

The **Assign** dialog box appears.
7. From the **Assignee** list, select a user to which you want to reassign the tasks.

**Note:** The **Assignee** list contains the potential owners shared by all selected tasks. For more information, see [“Potential Owners” on page 80](#).
8. Optionally, add a comment.
9. Click **Assign**.

The task panel updates. The reassigned tasks appear in the **My Open Tasks** tab for the assigned user. The user name of the assignee appears in the **Owner** field of the tasks.

## Releasing Tasks

Release assigned tasks to the pool of available tasks so other users can work on the tasks. For example, you might want to release tasks that you cannot complete before the due date. If you are a task administrator, you might want to release all tasks assigned to an user on vacation.

1. Click **Task Manager**.

The task panel contains a list of tasks.
2. To release your tasks, click **My Assigned Tasks**.

The task panel lists all your assigned tasks.
3. To release all assigned tasks, click **All Assigned Tasks**.

The task panel lists all assigned tasks.
4. Optionally, to find tasks to manage, use custom filters or search.
  - a. Click the **Filters** icon, and then add filters.
  - b. In the search box, enter a search term, and then click the search icon.
5. Select the check box beside the tasks that you want to manage.

The **Selected** list appears.
6. From the **Selected** list, select **Release**.

The **Release** dialog box appears.
7. Optionally, add a comment.
8. Click **Claim**.

The task panel updates. The tasks appear in the **Available Tasks** tab for users who are potential owners of the tasks. Those users can claim and work on the tasks.

## Editing Tasks

You can edit the details of tasks. For example, if changes are made to the record of an important client, you might want to increase the priority of tasks related to the client. Or, if you plan to be away and want to finish a set of tasks before you leave, you can change the due dates for the tasks.

1. Click **Task Manager**.

The task panel contains a list of tasks.

2. To edit your assigned tasks, select **My Assigned Tasks**.

The task panel lists your assigned tasks.

3. To edit all available tasks, select **All Available Tasks**.

The task panel lists all available tasks.

4. Optionally, to find tasks to manage, use custom filters or search.

- a. Click the **Filters** icon, and then add filters.

- b. In the search box, enter a search term, and then click the search icon.

5. From the **Selected** list, select **Edit**.

The **Edit** dialog box appears.

6. Edit one or more of the following fields to change the task properties of the selected tasks:

Field	Description
Task Title	Enter a title that is more meaningful to you. A good title includes at least the name of the record and the change that initiated the review.
Priority	Select a priority that reflects the urgency within the business to resolve this change.
Due Date	Select a due date that reflects the urgency within the business to resolve the change.
Assignee	Reassign this task to someone else. <b>Note:</b> Only potential owners shared by all the selected tasks appear. For more information, see <a href="#">"Potential Owners" on page 80</a> .
File Attachment	Attach files to provide additional information about the task. Attachments appear in the <b>Task Details</b> dialog box. <b>Note:</b> The <b>File Attachment</b> field is available only if the task supports attachments.
Add Comment	Add comments to explain edits to the task properties and to track questions and answers about the task. Comments appear in the <b>Comments</b> tab.

7. Click **Save**.

The task panel updates. You can view the edited task details in the **Task Details** dialog box for each task. Based on your changes, some tasks might not appear in the task panel.

## CHAPTER 12

# Managing Suppliers

This chapter includes the following topics:

- [Supplier Management Overview, 99](#)
- [The Change Approval Process, 100](#)
- [Viewing Supplier Data, 101](#)
- [Onboarding Status, 102](#)
- [Creating Hierarchical Relationships Among Suppliers, 103](#)
- [Sending an Update for Approval, 103](#)
- [Reviewing an Updated Supplier Profile, 103](#)
- [Uploading Product Catalogs, 104](#)
- [Deleting a Supplier Profile, 104](#)

## Supplier Management Overview

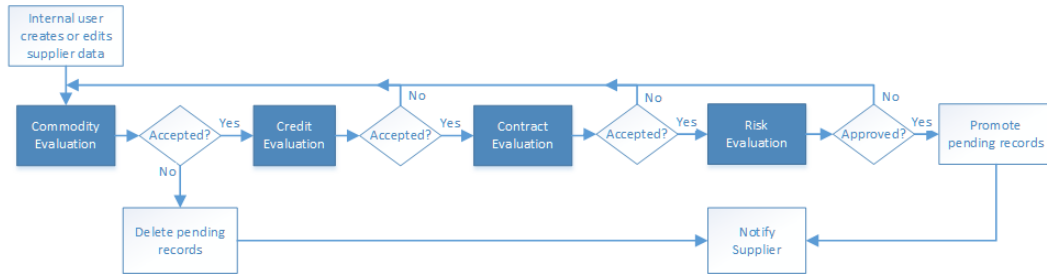
If your administrator configured the Supplier Portal to make some pages non-editable, supplier representatives need to contact a business manager in your organization to make a change to the restricted information. A manager might also edit a profile to send alerts or make other data changes.

After updating a profile, the manager can send the update through a change approval process. The change approval process is similar to the approval process.

# The Change Approval Process

The default change approval process is a four-step process. The process begins when a business manager creates or edits a supplier profile from Supplier 360. Your administrator might set up a different process.

For example, the following diagram shows an overview of the default process. The dark blue fill identifies the people activities.



The first people activity is the commodity evaluation, which requires a commodity manager to review the update. If the commodity manager accepts it, the update moves on to a credit evaluation and then a contract evaluation. The last approval step is a risk evaluation. If the compliance manager believes the risk is acceptable, the manager approves the update and notifies the supplier. At any stage, a manager can reject the update.

The following table summarizes the people activities within the process, the required role, and the possible actions:

People Activity	Role Assigned	Possible Actions
Commodity Evaluation	CommodityManager	<ul style="list-style-type: none"> <li>- Accepts the update. This action sends the update onto the Credit Evaluation step.</li> <li>- Rejects the update. This action deletes the pending record containing the changes.</li> <li>- Disclaims the task with an explanation so that someone else can claim it.</li> </ul>
Credit Evaluation	FinanceManager	<ul style="list-style-type: none"> <li>- Accepts the update. This action sends the update onto the Contract Evaluation step.</li> <li>- Rejects the update with explanation. This action sends the update back to the Commodity Evaluation step.</li> <li>- Disclaims the task with an explanation so that someone else can claim it.</li> </ul>
Contract Evaluation	ContractManager	<ul style="list-style-type: none"> <li>- Accepts the update. This action sends the update onto the Risk Evaluation step.</li> <li>- Rejects the update with explanation. This action sends the update back to the Commodity Evaluation step.</li> <li>- Disclaims the task with an explanation so that someone else can claim it.</li> </ul>
Risk Evaluation	ComplianceManager	<ul style="list-style-type: none"> <li>- Approves the update. This action applies the changes to the master data.</li> <li>- Rejects the update with explanation. This action sends the update back to the Commodity Evaluation step.</li> <li>- Disclaims the task with an explanation so that someone else can claim it.</li> </ul>

# Viewing Supplier Data

Supplier 360 comes with a supplier view menu that gives you the option to view supplier data from various perspectives. You can view supplier data by using the different views. Search for a supplier and open the supplier profile.

You can see the following views in Supplier 360:

## **Supplier Dashboard**

Displays a business view of the supplier, such as supplier details, onboarding time, documents uploaded and documents due for renewal, and alternate suppliers.

## **Matching Records**

Displays supplier profiles that are potential matches to the selected supplier profile. You can select records that are potential matches as merge candidates. You can preview the result of a merge between the business entity and the merge candidates that you select.

## **Business Entity**

Displays all details of the supplier. Use the view to edit the supplier data.

## **Cross-reference**

Displays the best version of the truth for the supplier and the cross-reference records that have merged with the supplier record. The cross-reference records are organized by the source system from which they originated. Use the Cross-reference view to track the source and lineage of the supplier data.

## **History**

Displays a chronology of changes in the supplier data. You can view the data that existed in the supplier recorded at any point in time in the chronology. View the data before a data event and after a data event to determine if the event caused the inappropriate data change. You can view the best version of the truth for a supplier record at a specific points in time, and then compare the differences.

## **Timeline**

Displays a timeline that shows the effective periods of a supplier. You can get a two-dimensional visibility into data. The two-dimensional visibility into data is based on the effective period and history of records. The effective period is the period of time for which a record is effective.

## **Hierarchy**

Displays how a supplier profile is related to other supplier profiles. Use the Hierarchy view to identify, understand, and manage the relationships that exist between supplier profiles.

# Onboarding Status

Supplier profiles have an onboarding status, which is set and updated as the supplier progresses through registering on the Supplier Portal, submitting an application, and finally being approved or declined as a supplier.

The following table describes the onboarding status values:

Onboarding Status Value	Description
Registered	A supplier representative registered the supplier organization on the Supplier Portal.
Submitted	A supplier representative completed the online supplier application form and submitted the form.
Approved	The supplier application passed the qualification process.
Rejected	The supplier application failed the qualification process.
Deactivated	A manager deactivated a previously approved supplier for business reasons, such as noncompliance. Representatives from a deactivated supplier can no longer log into the Supplier Portal.

## Deactivating a Supplier

You can deactivate an approved supplier. For example, you might want to deactivate suppliers who do not upload current compliance documents after repeated reminders.

1. Find and open the supplier profile.
2. Expand the **Status** area.
3. Click the **Edit** icon.
4. In the Party Status Type field, select **Onboarding Status** from the list.
5. In the Party Status Value field, select **Deactivated** from the list.
6. Optionally, set the effective dates.
7. Click **Apply**.

## Reactivating a Deactivated Supplier

You can reactivate a deactivated supplier by setting the onboarding status. For example, you might want to reactivate suppliers when their documentation is up to date.

1. Find and open the supplier profile.
2. Expand the **Status** area.
3. Click the **Edit** icon.
4. In the Party Status Type field, select **Onboarding Status** from the list.
5. In the Party Status Value field, select **Approved** from the list.
6. Optionally, set the effective dates.
7. Click **Apply**.

# Creating Hierarchical Relationships Among Suppliers

If your administrator enabled hierarchies for the Application, you can create relationships for a supplier. For more information about hierarchies, see the Data Director online help.

## Sending an Update for Approval

After you complete your edits, you can send the edited supplier profile through the change approval process.

1. Edit the supplier profile as required.
2. After you edit all affected areas and apply changes, click **Send for Approval**.  
The **Create Task** dialog box opens with default values for all task attributes.
3. In the Title field, replace the default title with a meaningful title for this workflow.  
For example, if you edited banking information for XYZ Supplies, you might enter the title Updating XYZ Supplies-Bank Information.
4. In the Task Type field, you can see the name of the approval process that is initiated. If a drop-down arrow appears on the field, you might be able to select a different process.
5. Change other default task attributes as required.
6. Click **OK**.

The ActiveVOS Server begins executing activities. When the ActiveVOS Server reaches the first people activity in the process, it creates a task of the correct task type. The ActiveVOS Server sends the task to the users who have the role associated with that task type.

## Reviewing an Updated Supplier Profile

If your role requires you to review updates to supplier profiles, you receive task notifications in your Task Inbox. Before you begin working on a task, you claim it.

1. In the **Task Inbox**, select one of your claimed tasks and click **Open**.  
The supplier profile opens in the Data tab. A note at the top of the page indicates that the supplier profile is in a pending state. Icons mark the areas with changed data.
2. For each area with a change icon, review all changed data to see if the changes meet your business standards.
3. After you finish the review, click **Task Actions** and select an appropriate action.
  - If you agree with the update and the task type permits you to approve updates, click **Approve**. The ActiveVOS Server marks the related Final Review people activity as completed and performs the next activity in the process.
  - If you agree with the update, but the task type does not permit approval at this point in the workflow, click **Accept**. The ActiveVOS Server marks the related Review No Approve people activity as completed and performs the next activity in the process.

- If you disagree with the update, click **Reject** and type an explanation in the Comment box. The task is reassigned to the person who initiated the update.
- If you think that you are the wrong person to assess the validity of this update, click **Disclaim** and type an explanation in the Comment box. Someone with the same role needs to take action on the task.

## Uploading Product Catalogs

If your organization uses a Product Information Management (PIM) system, you can continue to upload product catalogs from the PIM interface. If the PIM system is integrated with the Application, suppliers can view and upload product catalogs from the Supplier Portal.

## Deleting a Supplier Profile

When you delete a supplier profile, the profile is soft-deleted, that is, the supplier record is assigned a hub state of -1. You can restore soft-deleted profiles.

**Note:** If a profile has contacts, the contacts are not soft-deleted. Contacts are separate entities that are associated with a supplier profile. To delete a contact, search for it and delete it.

1. Open the supplier record.
2. Open the **Actions** menu, and click **Delete**.
3. When prompted for confirmation, click **Yes**.



## CHAPTER 13

# Broker Role for Supplier 360

This chapter includes the following topics:

- [Overview, 105](#)
- [Supplier Portal Fields, 105](#)
- [Assigning Supplier Broker Role to Existing or New Users, 106](#)
- [Associating Supplier Profile to a Broker User, 106](#)
- [Selecting Profile Associated to the Broker User, 107](#)

## Overview

You can create supplier broker user to efficiently access multiple supplier profiles.

A broker user refers to a user role that can perform catalog uploads and updates for multiple suppliers. Broker users can switch between the assigned supplier profiles to perform the operations on behalf of their clients.

In the Supplier Portal of Supplier 360, when a broker user logs in, the Supplier Portal of Product 360 opens. The broker user can use all the Product 360 services available for the role. This feature ensures a single point of access for the suppliers and broker users.

## Supplier Portal Fields

To enable association with a broker user, update the Supplier profile with the following Portal Configuration fields:

### **Profile Name**

Business entity field that stores the profile name of the user for login. Select profile name from the list of configured profiles in the Supplier Portal.

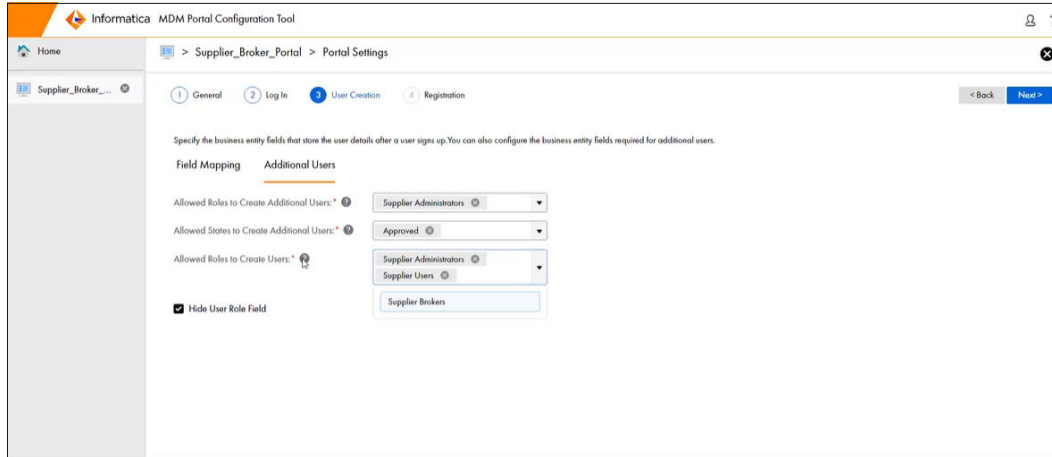
### **Profile State Description**

Business entity field that stores the state of the profile for login. Select profile status from the list of configured profiles in the Supplier Portal. For example, `Status.partyStsVal.partyStatusValDesc`.

# Assigning Supplier Broker Role to Existing or New Users

You can assign the **Supplier Brokers** role to any valid existing or new user in the Portal Configuration tool.

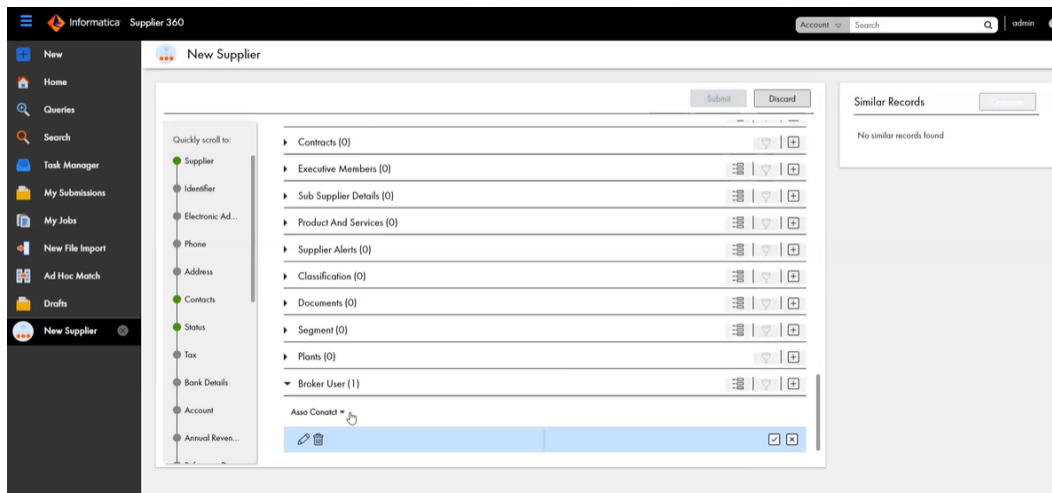
The following image shows the **User Creation** page in the Portal Configuration tool:



# Associating Supplier Profile to a Broker User

You can associate a supplier profile to an existing or a new broker user.

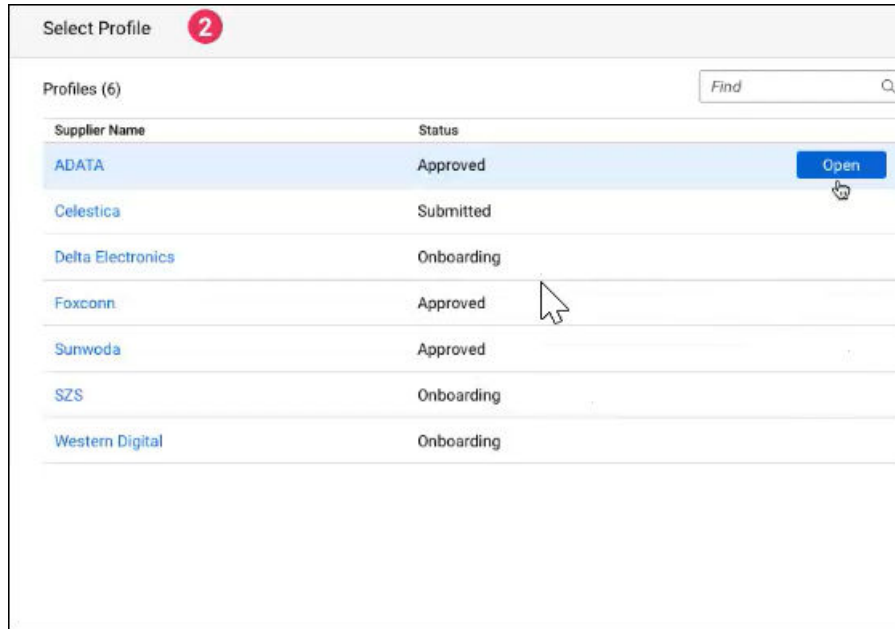
The following image displays the supplier profile where you can associate a broker user:



# Selecting Profile Associated to the Broker User

When you log in as a Supplier Broker, you can choose to open any Supplier profile associated with the Broker using the **Select Profile** page in the Portal Configuration tool.

The following image displays the **Select Profile** page:



The screenshot shows a web interface titled "Select Profile" with a red circle containing the number "2" next to the title. Below the title, there is a search bar labeled "Find" with a magnifying glass icon. The main content is a table with two columns: "Supplier Name" and "Status". The table lists six suppliers: ADATA (Approved), Celestica (Submitted), Delta Electronics (Onboarding), Foxconn (Approved), Sunwoda (Approved), and SZS (Onboarding). The "ADATA" row is highlighted in blue, and a blue "Open" button is visible to its right. A mouse cursor is pointing at the "Open" button.

Supplier Name	Status
ADATA	Approved
Celestica	Submitted
Delta Electronics	Onboarding
Foxconn	Approved
Sunwoda	Approved
SZS	Onboarding
Western Digital	Onboarding

# CHAPTER 14

## Communicating with Suppliers

This chapter includes the following topics:

- [Communicating with Suppliers Overview, 108](#)
- [Notifications and Alerts, 108](#)
- [Creating a Supplier Alert, 109](#)

### Communicating with Suppliers Overview

You can find the contact information for suppliers in their supplier profile. You can also create alerts, which supplier representatives can see in the supplier dashboard on the Supplier Portal. Notifications and alerts can be selectively communicated to your suppliers.

### Notifications and Alerts

You can communicate with suppliers by creating supplier alerts in their supplier profiles. On the Supplier Portal, alerts appear under the title Notifications.

You can use alerts to notify suppliers when you need updated information, such as documents. You can also alert suppliers about upcoming events, such as changes to policies or scheduled maintenance.

#### Types of Supplier Alerts

The following table describes the types of alerts:

Message Type	Description
Maintenance Update	Advise the supplier of upcoming maintenance activities.
Request for Information	Ask the supplier for additional information. For example, you might want to request up-to-date compliance documents.

Message Type	Description
Supplier Profile Updates	Advise the supplier of changes that a business manager made to the supplier profile.
Supplier Status	Alert the supplier to a change in the supplier status. For example, if you deactivate a supplier, you might want to notify the supplier.

## Creating a Supplier Alert

To create a supplier alert, open the supplier profile and edit the Supplier Alerts area.

1. Find and open the supplier profile.
2. Expand the **Supplier Alerts** area.
3. Define the alert by setting the following options:

Option	Description
Message Type	Select the type of alert.
Message	Type the text that you want to display to the supplier.
External Link	To include a link with the message text, specify a URL.
Effective Start Date	Set this date if you want to begin displaying the alert at a future date. If this option is undefined, the alert appears on the Supplier Portal after the edit is saved or, if you send the edit for approval, after the edit is approved.
Effective End Date	Set this date if you want to remove the alert at a future date. If this option is undefined, the alert remains on the Supplier Portal until you set this date.

4. Click **Apply**.

## CHAPTER 15

# Investigating Relationships

This chapter includes the following topics:

- [Investigating Relationships Overview, 110](#)
- [User Interfaces, 110](#)
- [Managing Hierarchy Relationships, 113](#)
- [Managing Network Relationships, 118](#)

## Investigating Relationships Overview

You can view how records are related to one another by viewing the relationships for records. You can create and manage two types of relationships: hierarchy relationships and network relationships. Hierarchy relationships define parent-child relationships between records, while network relationships define related records.

## User Interfaces

Use Data Director interfaces to manage hierarchy relationships and network relationships for a record.

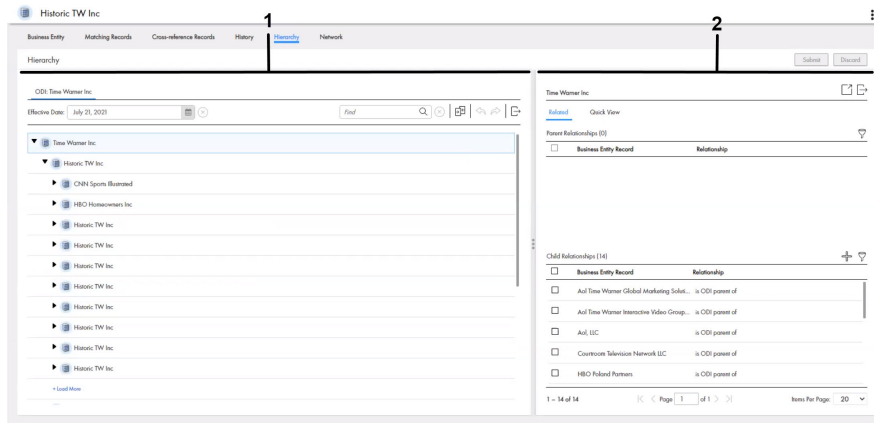
### Hierarchy View

The **Hierarchy** view displays the hierarchy relationships for the open record. Use the **Hierarchy** view to view, create, and manage relationships.

You can submit your hierarchy changes for review and approval. When you edit a hierarchy, your changes are highlighted in the **Hierarchy** view.

You can view the hierarchies for a record, including the hierarchy relationships in each hierarchy. You can view the hierarchy for an effective date, or compare the current version of the hierarchy with a version at another date. You can also export the hierarchy.

The following image shows a sample **Hierarchy** view for a record:



1. Hierarchy panel
2. Relationship panel

## Hierarchy Panel

The following table lists the user interface elements of the hierarchy panel:

User Interface Element	User Interface Element
Hierarchy tabs	Shows hierarchies to which the record belongs.
Graph	Shows the tree of hierarchy relationships for the open record based on the selected hierarchy.

A record can belong to multiple hierarchies. If you define a default hierarchy for the hierarchy component, the Hierarchies panel loads the default hierarchy for the record. Otherwise, the Hierarchies panel loads the list of hierarchies to which the record belongs.

## Relationship Panel

The following table lists the user interface elements of the relationship panel:

User Interface Element	Description
Related tab	Shows the parent and child relationships for the open record based on the selected hierarchy tab.
Quick View tab	Optional. Shows a condensed summary of the record details for the open record. <b>Note:</b> Your MDM administrator configures the <b>Quick View</b> tab. Contact your MDM administrator to configure the view.

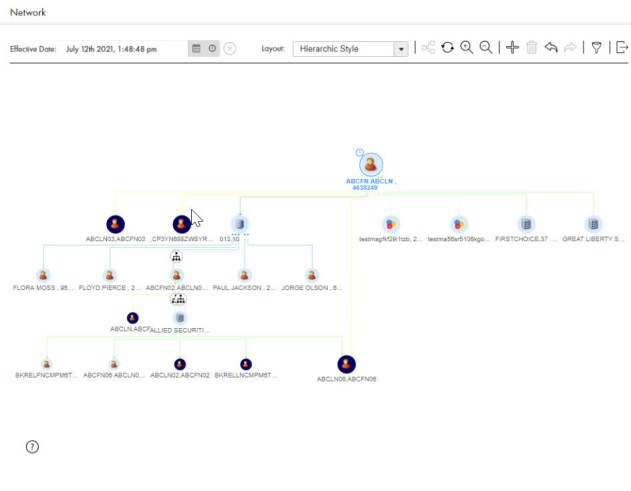
## Network View

The **Network** view displays all relationships for the open record, including network relationships and hierarchy relationships. Use the **Network** view to view, create, and manage network relationships and to view hierarchy relationships.

You can view the network of relationships for a record for an effective date. You can show, hide, and filter relationships and records in the network graph. You can also export the network graph.







## Relationship Panel

The following table lists the user interface elements of the relationship panel:

User Interface Element	Description
Active tab	Shows the active network relationships for the open record based on the effective date.
Inactive tab	Shows the inactive network relationships for the open record based on the effective date.
Quick View tab	Optional. Shows a condensed summary of the record details for the open record. <b>Note:</b> Your MDM administrator configures the <b>Quick View</b> tab. Contact your MDM administrator to configure the view.

## Managing Hierarchy Relationships

A record can belong to multiple hierarchies. A hierarchy contains hierarchy relationships between records. For example, the John Smith record might be part of the Organization hierarchy and the Household hierarchy.

Use the **Hierarchy** view to view and manage hierarchy relationships for a record. For example, when you view the John Smith record, you might see that the record belongs to the Organization hierarchy and the Household hierarchy. In the Organization hierarchy for the John Smith record, there is a hierarchy relationship from the Informatica record to the United States record, and then a hierarchy relationship from the United States record to the John Smith record.

You can compare the current version of hierarchy relationships with another date. You can set the start or end date of a relationship. If you want to see more information about a record, you can use the **Quick View** tab or open the record in an entity tab.

## Opening a Record in the Hierarchy View

Use the **Hierarchy** view to examine the hierarchy relationships between the open record and other records.

To open a record in the **Hierarchy** view, perform one of the following actions:

- In the **Search** tab search results, click the **More Options** icon and select **Hierarchy**.
- In the **Query** tab search results, click the **More Options** icon and select **Hierarchy**.
- In the record view that displays an opened record, click **Hierarchy**.

## Viewing Records and Relationships in a Hierarchy

View records and relationships in a hierarchy by expanding or collapsing nodes, viewing the parent and child relationships for a record, and viewing the relationship properties.

1. To navigate the hierarchy, click the arrow icon beside nodes to expand or collapse nodes.  
The child relationships for the selected nodes show or hide.
2. To view the parent relationships and child relationships for a record, select a node on the canvas.  
The **Related** tab displays the parent relationships and child relationships for the selected record.
3. To filter the relationships, in the relationship panel, click the **Filter** icon, and then add filters.  
The list of relationships in the relationship panel updates.
4. To search for a record, in the hierarchy panel, enter a search term in the **Search** field, and then click **Search**. To clear the search term and cancel the search, click **Cancel Search**.

**Note:** You can only search for the first 1000 nodes in a hierarchy.

## Adding a Hierarchy Relationship

To add a hierarchy relationship to a hierarchy, find the record to which you want to configure a relationship, and then define the relationship.

1. In the **Hierarchy** view, hover over a node on the canvas, and then click the **Add New Relationship to Selected Entity** icon.  
The **Add Related Records** window appears.
2. To find the record to which you want to create a relationship, perform the following actions:
  - a. In the relationship list, select a relationship.
  - b. Run a query to find a related record.
  - c. In the search results, select a record and then click **Select**.  
**Tip:** To select multiple records, press **Ctrl** and select records.
3. Optionally, define the attributes of the relationship.
4. Click **Save**.

You added a hierarchy relationship to a record. The record appears in the hierarchy as a child of the selected node.

When you are done editing the hierarchy, you submit your changes for approval. For more information, see [“Submitting Hierarchy Changes” on page 116](#).

## Deleting a Hierarchy Relationship

Delete a hierarchy relationship that you no longer need.

If a hierarchy relationship is no longer active, you can set the end date for a relationship. For more information, see [“Setting Today as the End Date for a Hierarchy Relationship” on page 115](#).

- ▶ In the **Hierarchy** view, hover over a node on the canvas, and then click the **Delete Selected Relationship** icon.

The hierarchy relationship to the record no longer appears in the hierarchy. In the relationship panel, the deleted relationship is highlighted in red.

When you are done editing the hierarchy, you submit your changes for approval. For more information, see [“Submitting Hierarchy Changes” on page 116](#).

## Editing the Relationship Properties of a Hierarchy Relationship

Edit the relationship fields or the start or end date of the relationship.

1. In the **Hierarchy** view, to edit the properties of a relationship, perform one of the following actions:
  - a. Hover over a node on the canvas and click the **Edit Selected Relationship** icon.
  - b. Select a node on the canvas. In the relationship panel, hover over a relationship, click the **More Actions** icon, and then select **Edit**.

The **Edit Relationship** panel opens.

2. Optionally, edit the relationship fields.

**Note:** Your MDM administrator configures the available relationship fields for the relationship. Contact your MDM administrator to change the fields.

3. Optionally, edit the start date or end date of the relationship.
4. Click **Apply**.

## Setting Today as the End Date for a Hierarchy Relationship

Configure today as the end date for a relationship to indicate the relationship as inactive.

1. In the **Hierarchy** view, select a node on the canvas.
2. In the relationships panel, hover over a relationship, click the **More Actions** icon, and then select **Set Today as End Date**.

## Comparing with Effective Date or History Date

Compare the current version of the hierarchy with a version of the hierarchy at another effective date or history date.

1. In the **Hierarchy** view, click the **Compare** icon.  
The **Compare from** panel and **Compare to** panel appear.
2. In the **Compare to** panel, select the type of date.
3. Select a date.
4. Click **Compare**.

In the **Compare from** panel, the current version of the hierarchy and hierarchy relationships appear. In the **Compare to** panel, the version of the hierarchy and hierarchy relationships for the selected date appears. Changes are highlighted.

The following table explains the highlights:

Highlight	Indicates
Green	New relationship
Yellow	Edited relationship
Red	Deleted relationship

## Viewing Records from the Hierarchy View

You can open a record in the entity tab to view the record details.

1. In the **Hierarchy** view, select a node on the canvas.
2. In the relationships panel, hover over a relationship, click the **More Actions** icon, and then select **Open**.  
The record opens in an entity tab.

## Exporting a Hierarchy

Export all nodes in the hierarchy or export only the expanded nodes in the hierarchy to a CSV file.

**Note:** Your MDM administrator configures the fields included in the export. Contact your MDM administration to change your export settings.

1. In the **Hierarchy** view, click the **Export** icon.
2. Select one of the following export options:

Option	Description
All	Export all nodes in the hierarchy, including collapsed nodes.
Expanded	Export expanded nodes in the hierarchy.

3. Save the CSV file.

## Submitting Hierarchy Changes

When you are done making changes to a hierarchy, submit your changes.

1. In the **Hierarchy** view, click **Submit**.  
The **Submit Hierarchy Changes** window appears.
2. Review your changes.

The following table explains the highlights:

Highlight	Indicates
Green	New relationship
Yellow	Edited relationship
Red	Deleted relationship

3. Click **Accept**.

If your user role permits you to save data without a review, the application saves the hierarchy. Otherwise, the application saves the hierarchy changes as a pending changes and initiates the review process associated with your role. For example, a workflow is triggered and a hierarchy task is created for managers to approve or reject your changes.

## Managing Multiple Hierarchy Relationships

Manage multiple hierarchy relationships in the relationship panel. You can edit or delete multiple relationships, and move multiple relationships from one parent to another.

### Editing Multiple Hierarchy Relationships

You can edit the properties of multiple active child relationships of the same relationship type. For example, you might want to use the same end date for multiple relationships.

1. In the relationship panel, select the records that you want to edit.
2. Hover over one of the selected records, click the **More Actions** icon, and then select **Edit**.
3. Edit the properties that you want to change.
4. Click **Apply**.
5. Click **Submit**.

The **Submit Hierarchy Changes** window appears.

6. Click **Accept**.

### Deleting Multiple Hierarchy Relationships

You can delete multiple active child relationships that you no longer need.

1. In the relationship panel, select the records that you want to delete or select **Select All** to select all the records.
2. Hover over one of the selected records, click the **More Actions** icon, and then select **Delete**.
3. Click **Submit**.

The **Submit Hierarchy Changes** window appears.

4. Click **Accept**.

### Moving Multiple Records

You can move multiple active child relationships from one parent to another.

1. In the relationship panel, select the records that you want to move.

2. Hover over one of the selected records, click the **More Actions** icon, and then select **Move To**.
3. In the **Move to** field, select the **More Actions** icon.  
The **Add Related Record** window appears.
4. Search for the target business entity, and then click **Select**.
5. In the **Existing Related Records** field, select **End relationships** or **Delete relationships**.
6. Click **Apply**.
7. Edit the properties that you want to change.
8. Click **Apply**.
9. Click **Submit**.  
The **Submit Hierarchy Changes** window appears.
10. Click **Accept**.

## Managing Network Relationships

You can view the network of relationships for a record. For example, the John Smith record might be related to the X100 Keyboard record. The Informatica record might be related to the John Smith record because Informatica employs John Smith.

Use the **Network** view the hierarchy relationships and network relationships for a record. You can also create additional network relationships in the **Network** view.

You can view the network of relationships for a record for an effective date. You can set the start or end date of a relationship. If you want to see more information about a record, you can use the **Quick View** tab or open the record in an entity tab.

### Opening a Record in the Network View

Use the **Network** view to examine the network relationships and hierarchy relationships between the open record and other records.

To open a record in the **Network** view, perform one of the following actions:

- In the **Search** tab search results, click the **More Options** icon and select **Network**.
- In the **Query** tab search results, click the **More Options** icon and select **Network**.
- In the record view that displays an opened record, click **Network**.

### Viewing Records and Relationships in the Network

View records and relationships in a network by expanding or collapsing nodes, viewing active and inactive relationships, or showing or hiding relationships on the canvas.

1. To expand a node, double-click on the node.
2. To change the details on the canvas, in the **Layout** list, select a layout.

Use one of the following values:

- **Network.** Displays the relationships in a connected graph. Default is **Network**.
  - **Hierarchy.** Displays the relationships in a tree graph.
3. To filter the business entities or relationships in the network graph, click the **Filter** icon, and then add filters.
  4. To filter the relationships, in the **Active** tab, click the **Filter** icon, and then add filters.
  5. To view relationships in the network for an effective date, in the **Effective Date** field, select a date.
  6. To hide relationships in the canvas, in the **Active** tab, hover over a row, click the **More Actions** icon, and then click **Hide on Canvas**.

The relationship is hidden in the canvas, and the **Shown on Canvas** icon disappears in the row.

7. To show relationships in the canvas, in the **Active** tab, hover over a row, click the **More Actions** icon, and then click **Show on Canvas**.

The relationship appears in the canvas, and the **Shown on Canvas** icon appears in the row.

8. To filter records shown on the canvas, in the relationship panel, click **Add Field**, and then select the filter. You can filter by business entity, relationship, or node visibility. You can also use up to three filters.

The relationship panel displays the records according to the filter used.

**Note:** The filter option is available for active and inactive relationships.

## Adding a Network Relationship to a Record

To add a network relationship to a hierarchy, find the record to which you want to configure a relationship, and then define the relationship.

1. In the **Network** view, select the node to which you want to add a relationship.
2. To add a relationship, perform any of the following actions:
  - In the network panel, hover over a node on the canvas, and then click the **Add** icon.
  - In the relationship panel, click the **Add Business Entity Record** icon.

The **Add Related Records** window appears.

3. To find the record to which you want to create a relationship, perform the following actions:
  - a. In the relationship list, select a relationship.
  - b. Run a query to find a related record.
  - c. In the search results, select a record and then click **Select**.

**Tip:** To select multiple records, press **Ctrl** and select records.

4. Optionally, define the attributes of the relationship.
5. Click **Save**.

You added a network relationship to a record. The relationship and record appears in the network.

## Adding a Record to the Network

Add a related record to the network.

1. In the **Network** view, click the **Add Business Entity Record** icon in the toolbar.

The saved queries window opens.
2. Run a query to find a related record.
3. Select a record and then click **Select**.

The record node appears in the **Network** view. The **Edit Relationship** panel appears for you to define the relationship. Or, create a network relationship to the record.

Next, create a network relationship to the record.

## Creating a Relationship between Records in the Network

Add a network relationship to an unconnected record in the network.

1. In the **Network** view, hover over a node, and then click the **Arrow** icon.
2. Drag and release the arrow on a record node to which you want to create a relationship. The **Edit Relationship** panel opens.
3. Optionally, if there are relationship fields, specify the relationship attributes.
4. Optionally, if timeline is enabled, configure the start date or end date.

## Setting Today as the End Date for a Network Relationship

Configure today as the end date for a relationship to indicate the relationship as inactive.

1. In the **Network** view, select a node in the canvas.
2. In the relationships panel, hover over a relationship, click the **More Actions** icon, and then select **Set Today as End Date**.

## Deleting a Network Relationship

Delete a network relationship that you no longer need.

- ▶ In the **Network** view, hover over a node on the canvas, and then click the **Delete Selected Relationship** icon.

## Editing the Relationship Properties of a Network Relationship

Edit the relationship fields or the start or end date of the relationship.

1. In the **Network** view, to edit the properties of a relationship, select a node in the canvas.
2. In the relationships panel, hover over a relationship, click the **More Actions** icon, and then select **Edit**. The **Edit Relationship** panel opens.
3. Optionally, edit the relationship fields.  
**Note:** Your MDM administrator configures the available relationship fields for the relationship. Contact your MDM administrator to change the fields.
4. Optionally, edit the start date or end date of the relationship.
5. Click **Apply**.

## Opening Related Records from the Network View

You can open a record to view the details of the record.

- ▶ To open a record, in the relationship panel, perform any of the following actions:
  - Select a record, and then click the **Open** icon.



- Hover over the record, click the **More Actions** icon, and then select **Open**.

## Exporting a Network

Export an image of the network.

**Note:** Your MDM administrator configures the fields included in the export. Contact your MDM administration to change your export settings.

1. In the **Network** view, click the **Export Graph** icon.
2. Save the PNG file.

## Managing Multiple Network Relationships

Manage multiple network relationships in the relationship panel. You can edit and delete multiple relationships, and move multiple relationships from one node to another.

### Editing Multiple Network Relationships

You can edit the properties of multiple relationships of the same relationship type. For example, you might want to use the same end date for multiple relationships.

1. In the relationship panel, select the records that you want to edit.
2. Hover over one of the selected records, click the **More Actions** icon, and then select **Edit**.
3. Edit the properties that you want to change.
4. Click **Apply**.
5. Click **Submit**.  
The **Change Network Summary** window appears.
6. Click **Accept**.

### Deleting Multiple Network Relationships

You can delete multiple network relationships that you no longer need.

1. In the relationship panel, select the records that you want to delete.
2. Hover over one of the selected records, click the **More Actions** icon, and then select **Delete**.
3. Click **Submit**.  
The **Change Network Summary** window appears.
4. Click **Accept**.

### Moving Multiple Records

You can move multiple network relationships from one node to another.

**Note:** You cannot move hidden relationships in the network panel.

1. In the relationship panel, select the records that you want to move.
2. Hover over one of the selected records, click the **More Actions** icon, and then select **Move to**.
3. In the **Move to** field, select the **More Actions** icon.  
The **Add Related Record** window appears.

4. Search for the target business entity, and then click **Select**.
5. In the **Existing Related Records** field, select **End relationships** or **Delete relationships**.
6. Click **Apply**.
7. Edit the properties that you want to change.
8. Click **Apply**.
9. Click **Submit**.  
The **Change Network Summary** window appears.
10. Click **Accept**.

## CHAPTER 16

# Creating Supplier Profiles on the Supplier Portal

This chapter includes the following topics:

- [Supplier Portal Overview, 123](#)
- [Supplier Portal Registration, 124](#)
- [Supplier Portal Online Application, 124](#)
- [Supplier Profile, 126](#)
- [Product 360 Integration, 126](#)
- [Supplier Profile Edit Privileges, 127](#)

## Supplier Portal Overview

Suppliers use the Supplier Portal to initiate a relationship with your organization and fill out an online application form. After business users in your organization approve a supplier, the supplier can use the Supplier Portal to upload product catalogs, upload documents, update information, and monitor performance.

**Note:** As a business user, you do not use the Supplier Portal, but it is helpful to understand the Supplier Portal experience from a supplier perspective.

### The Supplier Perspective

You are a representative for a snack food company, called Best Snack Foods. You want Best Snack Foods to become a supplier to a national retailer, called Supermarket Inc. Supermarket Inc has implemented the Supplier 360 application and set up their Supplier Portal.

The following steps outline a high-level view of the supplier experience, from initial contact to approved supplier.

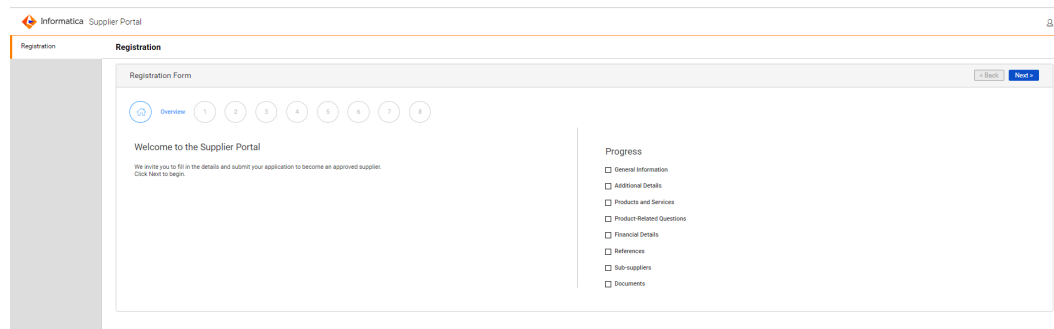
1. You, as a representative for Best Snack Foods, register on the Supermarket Supplier Portal.
2. You receive an email with user credentials and an invitation to fill out an online application form on behalf of Best Snack Foods.
3. You sign into the Supermarket Supplier Portal.
4. You fill out the online application form. You notice that the information that you provided when you registered is already in the application. The application requests additional information about Best Snack Foods, including things like bank information and insurance information. You save the application and return to it later. After you finish the application, you click **Submit**.

5. You wait two weeks for the results of the review by Supermarket supplier relationship managers. During this time, you sign into the Supermarket Supplier Portal and monitor the progress of the review. It is a four-step approval process requiring participation by multiple managers. The result of the review is positive.
6. You receive an email that confirms that Best Snack Foods is an approved supplier for Supermarket Inc.
7. You sign into the Supplier Portal and see a Welcome dashboard. You can monitor things like delivery performance and invoice amounts.
8. You upload a product catalog.
9. You add contact names for the people at Best Snack Foods who are authorized to interact with Supermarket Inc. If a contact has edit privileges for the supplier profile, you select Admin User. Otherwise, you select Portal User.
10. The contacts receive an email with user credentials and a link to the Supermarket Supplier Portal.

## Supplier Portal Registration

When a supplier representative registers on the Supplier Portal, the portal checks to see if a supplier profile exists for the supplier name. If a profile exists, the portal prompts the supplier representative to sign in. If not, the registration continues and the representative enters some general information about the supplier organization. After the registration is complete, the representative receives an email confirming the registration and inviting the representative to complete the online application.

The following image shows the details that a supplier has to fill in while registering on the Supplier Portal:



The screenshot displays the 'Registration' page of the Informatica Supplier Portal. The page title is 'Registration' and the sub-title is 'Registration Form'. A progress indicator at the top shows eight steps, with the first step, 'Overview', selected. The main content area contains a welcome message: 'Welcome to the Supplier Portal' and 'We invite you to fill in the details and submit your application to become an approved supplier. Click Next to begin.' To the right, a 'Progress' section lists the following steps with checkboxes: General Information, Additional Details, Products and Services, Product-Related Questions, Financial Details, References, Sub-suppliers, and Documents. The 'Next' button is visible in the top right corner of the form area.

## Supplier Portal Online Application

The online application form contains multiple pages. Each page focuses on a different type of information, such as tax information or banking information.

After a supplier representative submits an application form, the submission automatically triggers the qualification business process. The portal communicates with the MDM Hub, which saves the data that is entered in each page to separate records in a pending state. The MDM Hub links the records to construct and present a 360 degree view of a supplier to business users.

If the supplier is approved, the data in the supplier application form becomes the supplier profile. Supplier data does not need to be entered again.

## Adding Product-Related Questions

The online application form on the Supplier Portal includes a page for product-related questions. You can add questions to this page from Supplier 360.

When you create a product and service, you can define questions specific to the product and service.

1. In Supplier 360, click **New**, select **Products and Services**, and then click **OK**.  
The **Product and Services** page appears.
2. Enter a code for the product and service and a description for it.
3. To relate the product and service to a parent product and service, enter the code for the parent product and service.
4. In the **Questions** section, click **Create Child Record**.
5. Configure the following values.

Field	Description
Question Code	Identifier for the question.
Question Description	Question that you want the suppliers to answer.
Active Indicator	Indicates whether you want the question to be visible to the suppliers.
Answer Type	Type of answer you want to configure for the question. Use one of the following answer types: <ul style="list-style-type: none"><li>- Date. Indicates that the answer is a date.</li><li>- Multi-value. Indicates that the answer can have more than one option. For example, for a confirmatory question, you can have <b>Yes</b> and <b>No</b> as options.</li><li>- Text. Indicates that the answer is a text.</li></ul>
Lookup Options	Required only if you select <b>Multi-value</b> as the answer type. Comma-separated options for the question. Use the following format: "Option1,Option2,...OptionN" For example, "Yes,No" <b>Note:</b> The Lookup option lists all the child products in the Supplier business entity record even though the parent product is deleted. To remove the reference to the child products, you must delete all the child products associated with the parent product from the <b>Products and Services</b> section and then delete the parent product.
Mandatory Indicator	Indicates whether the question is a required question.

6. Click **Apply**.
7. To add more questions, repeat steps [4](#) through [6](#).
8. Click **Save**.

# Supplier Profile

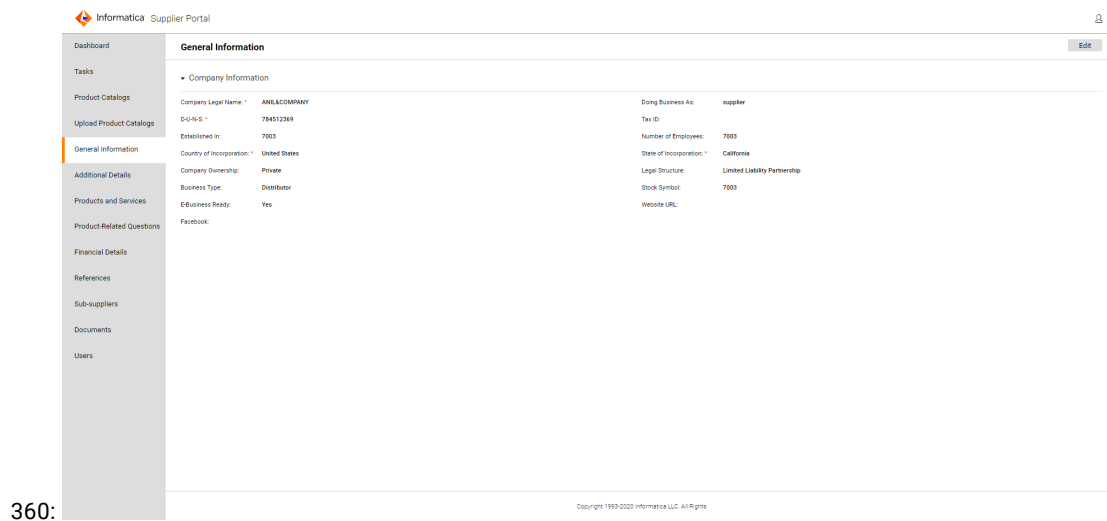
After a supplier is approved, the supplier application is converted to a supplier profile. The supplier profile contains all the information from the application.

Supplier representatives use the Supplier Portal to view their supplier profile. When a supplier representative signs on to the Supplier Portal, the representative sees the Welcome dashboard. In the left navigation panel under Company, the links summarize the information that makes up the supplier profile. In the display area, the representative can see messages, links to catalogs, notifications, renewal alerts, invoices, and some performance metrics. Authorized supplier representatives can modify information, add supporting documentation, upload catalogs, and monitor performance.

Business users use Supplier 360 to open and view supplier profiles. A data steward can edit data in the supplier profile, send notifications to the supplier, and change the status of a supplier. A data steward can also create supplier profiles.

If the Supplier Portal connects to a Product Management Information (PIM) system, the product catalog upload and product catalog management operations are available to the suppliers. The supplier must have the necessary permissions to upload and edit product catalogs.

The following image shows the Supplier Portal user interface when the environment is integrated with Product



# Product 360 Integration

You can integrate Supplier 360 with Product 360 to manage products details.

If you integrate Product 360 with Supplier 360, suppliers can upload their product catalogs from the Supplier Portal of Supplier 360. In Supplier 360, if you configure to support the Product 360 broker users, the broker users can access the Supplier Portal of Product 360 when they log in to Supplier Portal of Supplier 360. The broker users can access all the Product 360 services available for the role. The **Task View** page of the Supplier Portal displays all the Product 360 tasks, and the users can act on their assigned tasks.

# Supplier Profile Edit Privileges

By default, the supplier representative who submitted the online application has the Admin User role. This representative can edit supplier data on the Supplier Portal. If you want the supplier representative to contact you to change certain information, such as banking information, you can ask your Application administrator to make the page non-editable.

The supplier representative with the Admin User role can add additional contacts. When creating contacts, the representative decides if the contacts can edit the editable pages.

The following table summarizes the role privileges:

Supplier Portal Role	View Pages	Edit Editable Pages
Admin User	Yes	Yes
Portal User	Yes	No

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