

# Informatica<sup>®</sup> Multidomain MDM 10.5 HotFix 2

# Data Director User Guide

Informatica Multidomain MDM Data Director User Guide 10.5 HotFix 2 October 2023

#### © Copyright Informatica LLC 2005, 2024

This software and documentation are provided only under a separate license agreement containing restrictions on use and disclosure. No part of this document may be reproduced or transmitted in any form, by any means (electronic, photocopying, recording or otherwise) without prior consent of Informatica LLC.

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation is subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License.

Informatica, the Informatica logo, and ActiveVOS are trademarks or registered trademarks of Informatica LLC in the United States and many jurisdictions throughout the world. A current list of Informatica trademarks is available on the web at https://www.informatica.com/trademarks.html. Other company and product names may be trade names or trademarks of their respective owners.

Portions of this software and/or documentation are subject to copyright held by third parties. Required third party notices are included with the product.

The information in this documentation is subject to change without notice. If you find any problems in this documentation, report them to us at infa\_documentation@informatica.com.

Informatica products are warranted according to the terms and conditions of the agreements under which they are provided. INFORMATICA PROVIDES THE INFORMATION IN THIS DOCUMENT "AS IS" WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING WITHOUT ANY WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND ANY WARRANTY OR CONDITION OF NON-INFRINGEMENT.

Publication Date: 2024-04-24

# **Table of Contents**

Preface
Informatica Resources
Informatica Network
Informatica Knowledge Base
Informatica Documentation
Informatica Product Availability Matrices
Informatica Velocity
Informatica Marketplace
Informatica Global Customer Support
Chapter 1: Introduction 15
Data Director Overview
Key Concepts
Records
Business Entities
Subject Areas
Best Version of the Truth
Search and Compare
Merge
Review Processes and Tasks
Business Entity Relationships
Hierarchies Manager Relationships
Security and User Roles
Logging in to Data Director
Configuring Microsoft Internet Explorer
User Interface
Record Views
Chapter 2: Getting Started
Getting Started Overview
Home Page
Charts
Social Media Feeds
Search Engine and External URLs
Task Inbox
Start Page
Sorting and Filtering Tasks
Refreshing Data in the Home Page
Configuring the Columns for the Task Inbox
Localizing Your User Interface

Bookmarking Your User Interface
Part I: Data Director with Business Entities
Chapter 3: Adding Business Entity Records
Adding Records Overview
Data Validation in the Business Entity View
Adding a Person Scenario
Adding an Organization Scenario
Adding a Record
Adding a Record with Data from DaaS Provider
Configure a Sibling Reference Lookup
Sibling Reference Lookup Overview
Sibling Reference Lookup Configuration
Configuring the Root to Child Lookup
Configuring the Associate Sibling Lookup
Verify the Associate Sibling Lookup
Creating Records in the Data View
Copying a Record
Exporting a Business Entity Record
Chapter 4: Working with Draft Records 50
Working with Draft Records Overview    50
Adding a Draft Record
Editing a Draft Record
Submitting a Draft Record
Filtering Draft Records
Deleting Draft Records.    52
Chapter 5: Finding Records
Finding Records Overview.
Search Page
Queries Page
Using the Search Box to Find Records
Finding Records in an Elasticsearch Environment.
Filtering Records.
Customizing Search Results
Viewing and Opening a Record in an Elasticsearch Environment
Using Queries to Find Records
Types of Queries.
Creating a Query
Running a Query.
Viewing Query Results

Managing Queries
Editing a Saved Query
Deleting a Saved Query
Saving an Existing Query as a New Query
Migrating and Sharing Saved Queries
Migrating and Sharing all the Saved Queries
Migrating and Sharing a Single Saved Query
Filtering Child Records
Chapter 6: Exporting Business Entity Records
Chapter 7: Editing Records
Editing Records Overview
Editing a Single Record
Scenario for Editing a Record
Editing a Record
Edit Multiple Records
Editing Multiple Records
Viewing the Status of a Bulk Edit
Trigger the Bulk Edit Review Process
Adding and Editing Related Records
Scenario for Adding and Editing Related Records
Adding a Related Record
Viewing Related Records
Deleting a Related Record
Editing the Relationship Details
Deleting a Record
Chapter 8: Importing Bulk Data
Import Bulk Data Overview
Import Bulk Records
Import Bulk Relationships
Update Records
Field Mapping
Setting Default Values
Filtering Target Fields
Filtering Source Rows
Preview Records
Importing Data
Supported Date Patterns
Trigger the New File Import Review Process
File Import Summary Report
Match New Records with Existing Records

Match Rule Sets
Matching Records
Match Results
Chapter 9: Resolving Duplicate Records 89
Resolving Duplicate Records Overview
Matching Records View
Matching Records and Match Rules
Best Version Of the Truth and Trust Scores
Merging Duplicate Records
Scenario for Duplicate Records
Resolving Duplicate Records
Identifying Duplicate Parent Records
Finalizing the Best Version Of the Truth
Identifying Duplicate Child Records
Merging Duplicate Records
Resolving Duplicate Child Records in a Single Record
Chapter 10: Establishing the Best Version of the Truth
Master Records and the Best Version of the Truth
Scenario
Establish the Best Version of the Truth
Understand Manual Updates to a Master Record
Unmerge Cross-reference Records
Chapter 11: Investigating Data Changes 103
Investigating Data Changes Overview
Investigating Data Changes Scenario
Investigating Data Changes in a Record
Chapter 12: Investigating Relationships
Investigating Relationships Overview
User Interfaces
Hierarchy View
Network View
Managing Hierarchy Relationships
Opening a Record in the Hierarchy View
Viewing Records and Relationships in a Hierarchy
Adding a Hierarchical Relationship
Deleting a Hierarchy Relationship
Editing the Relationship Properties of a Hierarchy Relationship
Setting Today as the End Date for a Hierarchy Relationship
Comparing with Effective Date or History Date

Exporting a Hierarchy
Submitting Hierarchy Changes
Managing Multiple Hierarchy Relationships
Managing Network Relationships
Opening a Record in the Network View
Viewing Records and Relationships in the Network
Adding a Network Relationship to a Record
Adding a Record to the Network
Creating a Relationship between Records in the Network
Setting Today as the End Date for a Network Relationship
Deleting a Network Relationship
Editing the Relationship Properties of a Network Relationship
Opening Related Records from the Network View
Exporting a Network
Managing Multiple Network Relationships
Chapter 13: Investigating Data Change Events for Effective Periods 119
Investigating Data Change Events for Effective Periods Overview
Investigating Data Change Events Scenario
Viewing Data Change Events
Adding Data Change Events
Removing Data Change Events
Part II: Data Director with Subject Areas
Chapter 14: Adding Subject Area Records
Adding Records in the Data View Overview
Example of Adding Subject Areas in the Data View
Creating Records in the Data View
Chapter 15: Investigating Data Changes in the History View (Legacy) 127
Investigating Data Changes Overview
Investigating Data Changes Overview
Scenario for Investigating Data Changes
Scenario for Investigating Data Changes.       127         Opening the History View.       128
Scenario for Investigating Data Changes.       127         Opening the History View.       128         Viewing Data Events in the History View.       128
Scenario for Investigating Data Changes.       127         Opening the History View.       128         Viewing Data Events in the History View.       128         Comparing Data Before and After Data Events.       130
Scenario for Investigating Data Changes.       127         Opening the History View.       128         Viewing Data Events in the History View.       128         Comparing Data Before and After Data Events.       130         Chapter 16: Merging Records in the Matches View.       132
Scenario for Investigating Data Changes.       127         Opening the History View.       128         Viewing Data Events in the History View.       128         Comparing Data Before and After Data Events.       130         Chapter 16: Merging Records in the Matches View.       132         Merging Records Overview.       132

Overriding the Merge Preview Results
Merging Records in the Matches View
Chapter 17: Unmerging Records in the XREF View
Unmerging Records Overview
Example of Unmerging Record
Opening the XREF View
Sending an Unmerge Proposal for Review
Chapter 18: Search Queries from the Data Tab
Search Queries from the Data Tab Overview
Types of Searches
Basic Search
Extended Search
Advanced Search
Basic and Extended Search Queries
Wildcards in Basic Search
Specify Search Criteria
Creating Basic or Extended Queries
Advanced Search Queries
Logical Operators
Conditional Operators
Comparison Operators
Date Syntax in Advanced Search Queries
Creating Advanced Search Queries
Example of an Advanced Search Query
Search Results
Opening Records from Search Results
Exporting Search Results
Saved Search Queries
Saving Search Queries
Running Saved Search Queries
Viewing Details About Saved Queries
Setting Your Default Query
Renaming Saved Queries
Editing Saved Queries
Deleting Saved Queries
Sharing Saved Queries
Exporting Saved Queries
Importing Saved Queries
Chapter 19: Working with Records in the Data Tab
Working with Records in the Data Tab Overview

Pending Records in the Data Tab
Opening Records from Search Results
Creating Filters for Child Records
Switching Between Form and Table View
Viewing System Columns
Copying a Record
Editing Data In Records
Editing Effective Periods
Adding an Effective Period
Display Aggregated Period for Timeline-Enabled Record
Investigating a Record
Deleting a Record
Chapter 20: Investigating Hierarchies and Relationships
Investigating Relationships Overview
Opening a Record in the Network View
Displaying Records and Relationships on the Canvas
Selecting a Layout
Filtering Records and Relationships
Hiding and Showing Records on the Canvas.       165
Navigating the Canvas
Setting Canvas Options
Investigating Related Records
Viewing Record Data
Viewing Source Systems and Pending Changes
Viewing System Columns
Viewing and Editing Relationship Details
Viewing the Hierarchy for a Related Record
Viewing a History of Relationship Changes
Changing Records and Relationships for a Record
Adding a Record to the Canvas.       169         Adding a Relationship.       170
Editing a Record from the Hierarchy View
Finding Duplicate Records from the Hierarchy View
Initiating a Merge from the Hierarchy View
Deleting a Record from the Hierarchy View
Deleting a Relationship
Sharing the Hierarchy View of a Record
Sharing a Bookmark to the Hierarchy View
Sharing a bookmark to the Hierarchy view
Saving an image of the Graph
Chapter 21: Investigating Timeline Data in the Effective Periods View 174
Investigating Data Change Events for Effective Periods Overview

Example of Viewing Data Change Events
Opening the Effective Periods View
Viewing Data Change Events
Chapter 22: Importing Data
Data Import Overview
Source File
Importing Source Data from a File
Part III: Tasks and Reviews 179
Chapter 23: Tasks 180
Tasks Overview
Task Manager
Details View
List View
Potential Owners
Potential Task Actions
Finding Tasks
Exporting Tasks
Chapter 24: Participating in Review Processes
Participating in Review Processes Overview
Participating in Review Processes Overview.    188      Example of a Review Process for Edits.    188      Claiming a Task.    189
Participating in Review Processes Overview.    188      Example of a Review Process for Edits.    188
Participating in Review Processes Overview.       188         Example of a Review Process for Edits.       188         Claiming a Task.       189         Resolving a Task.       190         Reviewing an Edited Record.       190
Participating in Review Processes Overview.       188         Example of a Review Process for Edits.       188         Claiming a Task.       189         Resolving a Task.       190
Participating in Review Processes Overview.       188         Example of a Review Process for Edits.       188         Claiming a Task.       189         Resolving a Task.       190         Reviewing an Edited Record.       190
Participating in Review Processes Overview.       188         Example of a Review Process for Edits.       188         Claiming a Task.       189         Resolving a Task.       190         Reviewing an Edited Record.       190         Reviewing a New Record.       192
Participating in Review Processes Overview.188Example of a Review Process for Edits.188Claiming a Task.189Resolving a Task.190Reviewing an Edited Record.190Reviewing a New Record.192Reviewing a Merge Task.193Reviewing an Unmerge Task.195Reviewing a Hierarchy Task.196
Participating in Review Processes Overview.188Example of a Review Process for Edits.188Claiming a Task.189Resolving a Task.190Reviewing an Edited Record.190Reviewing a New Record.192Reviewing a Merge Task.193Reviewing an Unmerge Task.195
Participating in Review Processes Overview.188Example of a Review Process for Edits.188Claiming a Task.189Resolving a Task.190Reviewing an Edited Record.190Reviewing a New Record.192Reviewing a Merge Task.193Reviewing an Unmerge Task.195Reviewing a Hierarchy Task.196Reviewing a Rejected Hierarchy Task.197Organizing Work on Tasks.198
Participating in Review Processes Overview.188Example of a Review Process for Edits.188Claiming a Task.189Resolving a Task.190Reviewing an Edited Record.190Reviewing a New Record.192Reviewing a Merge Task.193Reviewing an Unmerge Task.195Reviewing a Hierarchy Task.196Reviewing a Rejected Hierarchy Task.197Organizing Work on Tasks.198Editing a Task.198
Participating in Review Processes Overview.188Example of a Review Process for Edits.188Claiming a Task.189Resolving a Task.190Reviewing an Edited Record.190Reviewing a New Record.192Reviewing a Merge Task.193Reviewing an Unmerge Task.195Reviewing a Hierarchy Task.196Reviewing a Rejected Hierarchy Task.197Organizing Work on Tasks.198
Participating in Review Processes Overview.188Example of a Review Process for Edits.188Claiming a Task.189Resolving a Task.190Reviewing an Edited Record.190Reviewing a New Record.192Reviewing a Merge Task.193Reviewing an Unmerge Task.195Reviewing a Hierarchy Task.196Reviewing a Rejected Hierarchy Task.197Organizing Work on Tasks.198Editing a Task.198Assigning Your Task to Another User.200Assigning a Task Back to the Pool.200
Participating in Review Processes Overview.188Example of a Review Process for Edits.188Claiming a Task.189Resolving a Task.190Reviewing an Edited Record.190Reviewing a New Record.192Reviewing a Merge Task.193Reviewing an Unmerge Task.195Reviewing a Hierarchy Task.196Reviewing a Rejected Hierarchy Task.197Organizing Work on Tasks.198Editing a Task.198Assigning Your Task to Another User.200
Participating in Review Processes Overview.188Example of a Review Process for Edits.188Claiming a Task.189Resolving a Task.190Reviewing an Edited Record.190Reviewing a New Record.192Reviewing a Merge Task.193Reviewing an Unmerge Task.195Reviewing a Hierarchy Task.196Reviewing a Rejected Hierarchy Task.197Organizing Work on Tasks.198Editing a Task.198Assigning Your Task to Another User.200Assigning a Task Back to the Pool.200
Participating in Review Processes Overview.188Example of a Review Process for Edits.188Claiming a Task.189Resolving a Task.190Reviewing an Edited Record.190Reviewing a New Record.192Reviewing a Merge Task.193Reviewing an Unmerge Task.195Reviewing a Hierarchy Task.196Reviewing a Rejected Hierarchy Task.197Organizing Work on Tasks.198Editing a Task.198Assigning Your Task to Another User.200Disclaiming a Task.200Disclaiming a Task.200
Participating in Review Processes Overview.188Example of a Review Process for Edits.188Claiming a Task.189Resolving a Task.190Reviewing an Edited Record.190Reviewing a New Record.192Reviewing a Merge Task.193Reviewing an Unmerge Task.195Reviewing a Hierarchy Task.196Reviewing a Rejected Hierarchy Task.197Organizing Work on Tasks.198Editing a Task.198Assigning Your Task to Another User.200Assigning a Task.200Chapter 25: Managing Tasks.201Managing Tasks.201Claiming Tasks.201
Participating in Review Processes Overview.188Example of a Review Process for Edits.188Claiming a Task.189Resolving a Task.190Reviewing an Edited Record.190Reviewing a New Record.192Reviewing a Merge Task.193Reviewing a Unmerge Task.195Reviewing a Rejected Hierarchy Task.196Reviewing a Rejected Hierarchy Task.197Organizing Work on Tasks.198Editing a Task.198Assigning Your Task to Another User.200Disclaiming a Task.200Chapter 25: Managing Tasks.201

Reviewing New Records
Reviewing Merge Tasks
Reviewing Unmerge Tasks
Organizing Work on Tasks
Assigning Tasks
Reassigning Tasks
Releasing Tasks
Editing Task Details
Chapter 26: Review Processes Reference
Chapter 26: Review Processes Reference.       212         Review Processes Reference Overview.       212
•
Review Processes Reference Overview
Review Processes Reference Overview.       212         Update With Approval Workflow.       213
Review Processes Reference Overview.       212         Update With Approval Workflow.       213         One Step Approval Workflow.       213
Review Processes Reference Overview.212Update With Approval Workflow.213One Step Approval Workflow.213Two Step Approval Workflow.214
Review Processes Reference Overview.212Update With Approval Workflow.213One Step Approval Workflow.213Two Step Approval Workflow.214Merge Workflow.214

# Preface

Use the Informatica<sup>®</sup> Multidomain MDM Data Director User Guide to learn how to create, consume, manage, and monitor master data in Data Director. You can manage business entity records or subject area records. Learn how to manage records, manage relationships between records, and update records. This guide contains two parts that explain how to use Data Director with business entities and how to use Data Director with subject areas.

If a Data Director application uses business entities to organize the data, see the following topics:

Goal	Where to Start
Chapter 2, "Getting Started" on page 26	Home page
Chapter 3, "Adding Business Entity Records" on page 35	New tab
Chapter 5, "Finding Records" on page 53	Search box
Chapter 7, "Editing Records" on page 67	Business Entity view
Chapter 9, "Resolving Duplicate Records" on page 89	Matching Records view
Chapter 10, "Establishing the Best Version of the Truth" on page 99	Cross-reference Records view
Chapter 11, "Investigating Data Changes" on page 103	History view
Chapter 13, "Investigating Data Change Events for Effective Periods" on page 119	Timeline view
Chapter 20, "Investigating Hierarchies and Relationships" on page 161	Hierarchy view
Chapter 24, "Participating in Review Processes" on page 188	Task Manager

If a Data Director application uses subject areas to organize the data, see the following topics:

Goal	Where to Start
Chapter 14, "Adding Subject Area Records" on page 124	New tab
Chapter 16, "Merging Records in the Matches View" on page 132	Match Merge Comparison view
Chapter 17, "Unmerging Records in the XREF View" on page 137	XREF view
Chapter 15, "Investigating Data Changes in the History View (Legacy)" on page 127	History view
Chapter 18, "Search Queries from the Data Tab" on page 143	Data tab

Goal	Where to Start
Chapter 19, "Working with Records in the Data Tab" on page 154	Data tab
Chapter 22, "Importing Data" on page 177	New tab

For key concepts, see the following topics:

- <u>"Business Entities" on page 17</u>
- "Subject Areas" on page 17
- <u>"Records" on page 16</u>
- "Best Version of the Truth" on page 17
- <u>"Search and Compare" on page 18</u>
- <u>"Merge" on page 18</u>
- "Hierarchies Manager Relationships" on page 19
- "Review Processes and Tasks" on page 18

# 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 <a href="https://network.informatica.com">https://network.informatica.com</a>.

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 <u>https://search.informatica.com</u>. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at <u>KB\_Feedback@informatica.com</u>.

## 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 <u>https://docs.informatica.com</u>.

If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at 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 <a href="https://network.informatica.com/community/informatica-network/product-availability-matrices">https://network.informatica.com/community/informatica-network/product-availability-matrices</a>.

## 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 <u>http://velocity.informatica.com</u>. If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at <u>ips@informatica.com</u>.

### 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 <a href="https://marketplace.informatica.com">https://marketplace.informatica.com</a>.

## Informatica Global Customer Support

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

To find online support resources on the Informatica Network, click **Contact Support** in the Informatica Intelligent Cloud Services Help menu to go to the **Cloud Support** page. The **Cloud Support** page includes system status information and community discussions. Log in to Informatica Network and click **Need Help** to find additional resources and to contact Informatica Global Customer Support through email.

The telephone numbers for Informatica Global Customer Support are available from the Informatica web site at <a href="https://www.informatica.com/services-and-training/support-services/contact-us.html">https://www.informatica.com/services-and-training/support-services/contact-us.html</a>.

# CHAPTER 1

# Introduction

This chapter includes the following topics:

- Data Director Overview, 15
- Key Concepts, 16
- Logging in to Data Director, 21
- User Interface, 22

## **Data Director Overview**

Data Director is a data governance tool. Use Data Director to create, manage, and use the master data that is stored in an MDM Hub Store. Master data is the collection of records that represent the best version of the truth about the people, places, and things that are important to your organization.

A master data domain is an area of data critical to the organization that is managed at the enterprise level to support semantic consistency across the organization. Common master data domains include Customer, Supplier, Location, Channel, Partner, Product, Asset, and General Ledger Account. Multidomain master data is the mastering of critical data across multiple master data domains concurrently. Multidomain MDM encompasses related master data domains that are central to an organization's business and business processes. The observations that arise out of multidomain master data are of significant interest to business executives. For example, in a healthcare organization, the relationships among doctors and healthcare sites might reveal gaps in services.

Your MDM administrator configured the application you use within Data Director. The MDM administrator implemented the master data domains by building data structures with a name that is meaningful for your organization. For example, Patient is an implementation of the Customer master data domain. The data structure relates records within a tree structure, with a root record, nodes, and child records. The MDM administrator can use one or both of the following data structures: business entities and subject areas. Each type of data structure comes with its own set of views for Data Director. Ask the MDM administrator which one is used in your application, and follow the instructions in the matching part.

This guide is organized into two parts that tell you how to use the available views:

- Data Director with Business Entities
- Data Director with Subject Areas

Based on your user role privileges, you can use the application to perform the following activities:

- Add records
- · Find and edit records

- · Verify that records contain the most reliable data from all source systems
- · Identify duplicate records and resolve them by merging the records
- Investigate changes to the data in records
- Unmerge merged records
- · Manage relationships between records
- · Participate in review processes for new and changed records

# **Key Concepts**

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

### Records

When you use Data Director, you are working with master records.

#### Master Records

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

#### **Root Records**

The root record contains the data that identifies the record. For example, the root record for John Smith contains data such as first name, last name, gender, and date of birth.

#### **Child Records**

A child record contains data that is associated with a root record. For example, a child record for John Smith might contain addresses while another child record contains phone numbers. 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.

#### Source Records

Source records contain the data that MDM used to create the master records that you see in Data Director. Source records are stored in source systems throughout your organization.

### **Business Entities**

Business entities are an implementation of master data domains in your application. For example, the Customer master data domain can be implemented in the following types of business entities: Person, Patient, or Policy Holder.

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 root 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.

#### **RELATED TOPICS:**

- "Records" on page 16
- <u>"Adding a Record" on page 37</u>
- "Adding a Person Scenario" on page 36
- "Editing Records" on page 67

### **Subject Areas**

Like business entities, a subject area is an implementation of a master data domain. Subject areas are the original data structure used in Data Director.

The data structure supports three levels: parent, child, and grandchild. The parent level corresponds to the root base object table. The child and grandchild levels are child records.

**Note:** Some applications for Data Director rely on the subject area data structure and custom code, and therefore have not been migrated to business entities. If you have questions about your application, contact your MDM administrator.

## Best Version of the Truth

When you view a record in Data Director, you view master data that is consolidated from source systems in your organization, including Data Director. The MDM Hub loads data from the contributing source systems. The load process uses a trust framework and rules to decide which cells from all the contributing source systems are most likely to contain accurate, up-to-date data. The consolidated record represents the best version of the truth (BVT) that is available across your organization.

Note: A BVT record is also known as master data, a golden profile, or a golden record.

For example, consider a car manufacturer that offers an incentive program to employees to buy cars. To construct BVT customer records, the data steward identifies the contributing source systems as the customer relationship management (CRM) system and the human resources (HR) system. The data steward trusts the employee address and telephone number from the HR system more than the same information in the CRM system, because employees are required to notify the human resources department of any changes to their contact information.

Data Director is a special type of contributing source system. Usually, data stewards set Data Director to the highest trust level of all contributing systems, which means that when a user edits data in Data Director, the edit is preferred over other source systems. You can also choose to override the automated BVT process and select a cell value you know is accurate.

For example, the following table shows data coming from two source systems and from Data Director:

Source	Last Name	First Name	Telephone	Telephone Trust
HR System	Brown	Nancy	555-1235	80
CRM System	Brown	Nancy	null	50
Data Director	Brown	Nancy	555-1234	90

Because Data Director has the highest trust score for telephone numbers, the updated telephone number is used. The data steward can add rules that cause the trust value to increase or decrease for a system. For example, if the telephone number is subsequently updated in the HR system, the system might prefer that telephone number because it was updated most recently.

## Search and Compare

A best practice in data governance is to check for existing records before adding new records. When you begin adding a record, Data Director (IDD) searches for duplicate records.

You can preview the potential duplicate records as they appear and take one of the following actions:

- If more than one record is a potential match for the record you are adding, you can compare the records side by side. If you find that the records are duplicates, you can initiate a merge.
- If one record matches the record you are adding, you can open the record and begin working with it. In this case, the record that you started adding is discarded.
- If none of the records is a match, you can continue adding the new record.

The MDM administrator configures the fields to use in the search for potential duplicates.

### Merge

After you compare records, you can merge records that appear to be duplicated.

When you merge a record, the root records of the merged record are consolidated into a single root record. The child records from each of the root records become child records of the merged root record.

#### **RELATED TOPICS:**

• "Resolving Duplicate Records" on page 89

### **Review Processes and Tasks**

A review process is an automated business process. When a user adds, edits, merges, or unmerges records, the action can initiate a review process. A review process ensures that business managers or data stewards review and ultimately approve the data before it becomes master data.

Your user role determines whether a change to the master data triggers a review. For example, if your user role permits you to add or edit data but not approve changes, then when you save an edit or merge records, the action triggers a review process.

A review process contains people activities. A people activity is a point in the review process when the process requires human participation. When an instance of a review process reaches a people activity, the review process sends a task notification. Business managers and data stewards receive task notifications in their task inboxes.

#### **RELATED TOPICS:**

- "Participating in Review Processes" on page 188
- "Example of a Review Process for Edits" on page 188

## **Business Entity Relationships**

A relationship is a connection between two business entities. In Data Director with business entities, you can create hierarchy relationships and network relationships between business entities.

#### hierarchy relationship

A hierarchy relationship is a connection between two business entity records that is hierarchical. For example, the Informatica business entity the parent of the John Smith business entity.

#### network relationship

A network relationship is a connection between two related business entity records. For example, the John Smith record is related to the PX100 Keyboard record.

You use the **Hierarchy** tab in the entity tab to investigate hierarchy relationships for a record. You use the **Network** tab in the entity tab to investigate network relationships for a record.

The MDM administrator configures relationships between business entities. You can create relationships between records based on the relationships between business entities.

### **Hierarchies Manager Relationships**

A record can have relationships with other records. When the Hierarchy view is enabled, you can view a graph that shows how a record is related to other records.

You use the **Hierarchy** view to investigate Hierarchy Manager relationships in Data Director with subject areas. You can view hierarchical relationships, such as an employer-employee relationship, as well as relationships that are not hierarchical, such as peer relationships.

### Security and User Roles

An MDM administrator creates user roles, configures permissions to resources and privileges for the user roles, and assigns a user role to all user accounts. Based on your job requirements, your access to master data might be different than your colleagues.

#### Types of security for business entities records

The following types of security exist:

#### Access to records based on the type of business entity

A user role is granted permission to all types of business entities or some types of business entities. For example, you can see the types of business entities that you have permission to create in the New dialog box. You might have access to the business entities Customer and Product, but someone else might have access to the business entities Product and Supplier.

#### Actions you can perform on a record

Your user role grants you a set privileges to the records for each type of the business entities. For example, a business user might have permission to read and create Customer records, but a data steward might also be able to delete and merge Customer records. The privileges can be different for different types of business entities.

In Data Director, your user role privileges control the types of actions you can perform:

- Create. You can create and save new master records.
- Read. You can view master records.
- Update. You can edit and save records.
- Delete. You can delete master records.
- Merge. You can identity and merge duplicate master records.
- Unmerge. You can unmerge a previously merged master record.

#### Access to records when a field contains a specified value

Your user role privileges might be constrained by field filters, which control whether you have access to the master record based on a value in a field. If a record contains a value specified in a field filter, the user roles are allowed or denied access to the record based on the rules that are defined in the filter.

#### Access to a parent record when a child node has no records

Your user role privileges might be constrained by node filters, which control whether you have access to a parent record when the node contains no child records.

#### Access to fields in a record

Some fields might be hidden from your user role. For example, a view of a Supplier business entity might show a DUNs number to people in the finance department, but not to people in the line of business.

#### Values you can input

Some fields might restrict the values that you can select or add based on your user role.

#### Values in reference entities

Some fields might restrict the values that you can select from a list of common values, such as country or gender, based on your user role.

#### Losing access to records

You might lose access to a record that you have accessed in the past.

A loss of access can occur under the following circumstances:

- You or someone else makes a change to a field value such that the record is now denied to your user role. For example, you add a European address to a person record and enable the GDPR check box. After you save the change, only the EU data stewards can access the person record.
- The MDM administrator creates new field filters or node filters on a business entity. One or more of the filters contain a rule that denies access to your user role.
- The MDM administrator changed the user role to which you were assigned.
- The MDM administrator modified the privileges for your assigned user role.

# Logging in to Data Director

To log in, you need the URL for Data Director and your user credentials. If your organization has created more than one application for Data Director, you also need the name of the application. If you do not have this information, contact your MDM administrator.

**Note:** If you cannot log in to the application and you are already running another MDM application in the browser, open a new browser window to log in to the application. The issue occurs because the application server that runs the MDM Hub uses the same session ID for both applications.

- 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>/e360/mdm/entity360view/

The Log In page opens.

- 3. Enter your user name and password.
- 4. Click Log In.
- 5. If prompted, select an application.

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

**Tip:** From the menu beside your username, you can change your password and change the language of the user interface.

## **Configuring Microsoft Internet Explorer**

If you launch Data Director in Microsoft Internet Explorer, to ensure that the data changes appear in the user interface, configure Microsoft Internet Explorer to reload the web pages. Otherwise, after a data change, you might see the cached data instead of the latest data.

- 1. Start Microsoft Internet Explorer.
- 2. Click Tools > Internet options.
- 3. On the **General** tab, configure the browsing history settings to check for newer versions of stored web pages every time you visit the web page.

The settings ensure that the latest version of the Data Director pages appear.

# **User Interface**

The Data Director user interface contains a navigation bar with tabs.

The following image shows the user interface with the Home page displayed:

					2			з 	4
≡	Informatica	MDM_s	ample ActiveVOS BE					All 🗢 Search	Q ds 1 😧
		1	Home						
	Home								
	Queries		My Open Tasks (0)	All Tasks			View All 🛛 🕄 🕸	Tweets by @Informa	atica 🛛 🔴
			Task Title	Туре	Priority	Due Date	Owner	Informatica @Informatica	<b>Y</b>
	Task Manager			Type		*	Enter the full user name	What good is data if you o modern cloud data wareh insights.	
					No tasks to v	law		InflammedialHVV/3485T Trust Your Data i a Multi-Cloud We organized InflammedialHVV/3485T Trust Your Data i InflammedialHVV/3485T	in orld
		Ŀ			≪l  4 Page 1	of1 N №	Tasks per page: 5 💌	Informatica Retweeted     Eric Vanderburg     @evanderburg     Six Stress for 100-00 Coefficients	•

- 1. Navigation bar
- 2. Page area
- 3. Search box
- 4. User options

The navigation bar contains tabs that link to pages within Data Director. A tab contains a page area with one or more panels. In some tabs, you can switch between different views within the page.

**Note:** Some tabs might not be visible in Data Director. For example, if the MDM administrator configures an application for Data Director with business entities, the MDM administrator might remove the **Data** tab.

Data Director has the following tabs:

#### New

Use the New tab to create records, and, if configured, import data.

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.

#### Home

Use the **Home** page as your MDM dashboard. Managers and data stewards can view a list of review tasks in the task inbox. You might see other components, such as social media feeds, external URLs, and charts. The MDM administrator configures the **Home** page.

#### Task Manager

Business users and task administrators use the **Task Manager** to review changes to business entity records and manage tasks. When you click a task on the **Home** page, the **Task Manager** opens and displays the record associated with the task.

#### Data

Use the Data tab to search for and view subject area records from different perspectives.

**Note:** If a Data Director application uses business entities and the **Data** tab is hidden, the records open in an entity tab that displays the name of the business entity type.

The Data tab has multiple views:

• To find a subject area record, run a search query from the **Data** tab. Use search tabs to manage and use search queries to find subject area records.

**Note:** If a Data Director application uses business entities and the **Data** tab is hidden, use the **Search** tab or **Search** box.

- To view and edit a subject area record, select a record and click Open. The record opens in the Data view.
- To view the source of the record and pending changes, use the XREF view.
- To view past changes to the record, use the History view.
- To view a subject area record and potential duplicate records, use the Match Merge Comparison view.
- If the subject area record contains effective dates, you can view scheduled changes in the Effective Periods view.
- If the Hierarchy Manager is enabled, you can view the subject area record and its related records in the **Hierarchy** view.

#### Search

When you run a search from the application header, the **Search** tab displays the results of the search. You can open business entity records from the search results.

#### **Entity tabs**

In the search results, select a business entity record and open the record in a temporary entity tab. The name on the tab identifies the opened record, usually by the name of the record, but the tab name is configurable. You can view or edit the master data for the record in an entity tab.

**Note:** If a Data Director application uses subject areas only, the entity tab is unavailable and the records open in the **Data** tab.

In an entity tab, you can open the following views in a tab:

- To view and edit business entity records, use the Business Entity view.
- To view the source of the business entity record, use the Cross-reference Records view.
- To view past changes to the business entity record, use the History view.
- To view a business entity record and potentially duplicate records, use the Matching Records view.
- To view the hierarchy relationships for a business entity record, use the Hierarchy view.
- To view the network relationships for a business entity record, use the Network view.
- If the business entity record contains effective dates, you can view the scheduled changes in the **Timeline** view.

Note: If your MDM administrator created custom record views, you might see different tab names.

#### Other Tabs

The MDM administrator can configure other tabs.

#### Additional Pages

The MDM administrator can configure additional pages for a Data Director application that uses the business entity model. Additional pages are custom pages that are associated to a custom tab and display information that is useful to users.

## **Record Views**

Based on how the MDM administrator configured your application for Data Director, you might have more than one way to access master data. When you access master data in Data Director, you use record views. You might have record views for business entities or record views for subject areas.

Usually the MDM administrator configures an application to use either business entities or subject areas. If you do not see the **Data** tab in the navigation bar, you have access to record views for business entities. If you see the **Data** tab, you have access to record views for subject areas.

If the application supports both business entities and subject areas, you have a hybrid application and both types of record views are available. In this case, you see the **Data** tab in the navigation bar. Also, when you use the **New** tab to create records, the **Business Entity** option and the **Subject Area** option appear.

Regardless of how you add a record, the MDM Hub Store saves the record that makes up the business entity or subject area in the same way. A parent record contains the identifying information. Child records contain other types of related information, such as addresses or telephone numbers.

The following table describes differences between records views for Data Director with business entities and record views for Data Director with subject areas:

Elements	Data Director with Business Entities	Data Director with Subject Areas
Access to record view	Use the tabs in an entity tab.	Use the tabs in the <b>Data</b> tab.
Data in the record view	Master data Optionally, related data from external sources, such as social media. Optionally, other panels, such as a <b>Similar</b> <b>Records</b> panel.	Master data
Core entities representation	Business entities	Subject areasl
Nesting records	Business entities can have an unlimited depth of descendant records.	A subject area can include descendant records up to the grandchild level.
Language in the user interface	You select the language to use. In the application header, select the menu beside your username and select <b>Change Language</b> .	You select the language to use. In the application header, select the menu beside your username and select <b>Change Language</b> .
Search	Smart search, which performs a full-text search. In the <b>Search</b> box in the application header, type your search term. In the <b>Search</b> tab, type your search term in the <b>Search</b> box. In the <b>Search</b> box in the Task Manager, type your search term.	Search queries, which searches for terms by field. Click <b>Data</b> , and then use an existing search query or create a new search query.

Elements	Data Director with Business Entities	Data Director with Subject Areas
Supported in Data Director version	10.0 and later	All supported versions
Data Director applications using the record views	Applications developed for Data Director version 10.0 and later. In addition, MDM administrators can update older applications.	Applications developed for Data Director version 9.7.x and earlier. <b>Note:</b> Some applications based on subject areas include customizations that cannot be easily converted to business entities.

### **RELATED TOPICS:**

• <u>"Data Director with Subject Areas" on page 123</u>

# CHAPTER 2

# **Getting Started**

This chapter includes the following topics:

- Getting Started Overview, 26
- Home Page, 27
- Start Page, 30
- Sorting and Filtering Tasks, 30
- <u>Refreshing Data in the Home Page, 32</u>
- Configuring the Columns for the Task Inbox, 32
- Localizing Your User Interface, 32
- Bookmarking Your User Interface, 33

# **Getting Started Overview**

After you log in to Data Director, you see the **Home** page. The **Home** page is unique to your organization and to your user role.

Based on the **Home** page layout, you might be able to monitor data in reports, monitor social media feeds, run a search in an embedded search engine, and organize your task inbox.

#### **RELATED TOPICS:**

- "Adding Business Entity Records" on page 35
- "Editing Records" on page 67
- "Resolving Duplicate Records" on page 89
- "Establishing the Best Version of the Truth" on page 99
- "Investigating Data Changes" on page 103
- "Investigating Hierarchies and Relationships" on page 161
- <u>"Participating in Review Processes" on page 188</u>

# Home Page

Use the **Home** page as a data monitoring dashboard. A **Home** page can contain charts that display information about your master data and display lists of available tasks in the task inbox. The **Home** page can also contain content from other external sources, such as Twitter or a search engine.

**Note:** The MDM administrator configures the **Home** pages by user role. If you and a colleague have different user roles, your page might look different from your colleague's page.

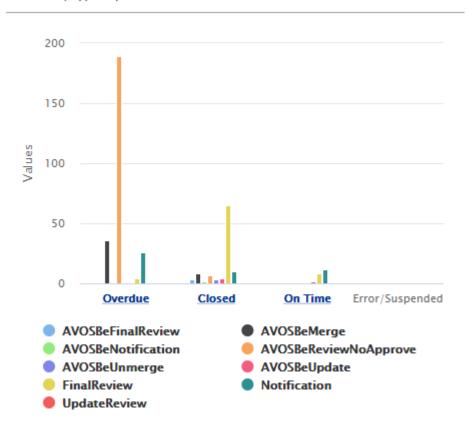
### Charts

A **Home** page can contain charts. Charts visually display information about business entity records, tasks, and other types of information.

You can select data in a chart and navigate to a drilldown chart that provides another layer of data granularity. You can select data in a chart and then navigate to another interface in Data Director that shows the relevant records or tasks.

**Note:** Your MDM administrator configures your charts, including links to drilldown charts or other interfaces, the look and feel of charts, and the source data used in charts. Contact your MDM administrator to request changes to your charts.

The following image shows a chart that displays the number of tasks based on the status of tasks:



#### Task Status/Type Report

### **Social Media Feeds**

A **Home** page can include social media feeds. Social media feeds can help you keep up with your organization's social media presence.

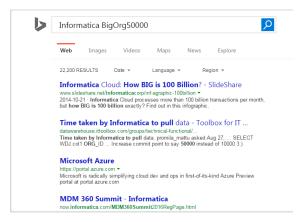
For example, the following image shows Twitter feed:

Tweets	Sollow
@InformaticaCorp	13 Oct
My followers live in the U.5 Spain (10.9%), India (6.9%) Create your map at twocat	& more.
	Corp

## Search Engine and External URLs

A **Home** page can include an embedded search engine or other external URLs. With embedded external URLs, you can access the internet without leaving Informatica Data Director. For example, you might search for the internet for more information about a business entity or monitor competitor offerings.

The following image shows an embedded Bing search engine:



### 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 My Closed Tasks filter selected:

My Open Tasks My Closed Tasks (3) All	Tasks All Unclaimed Tasks	All Closed Tasks All Claimed Tasks	2	3 View All
Task Title	Туре	Priority	Due Date	• Enter the full user name
Review Update in Person: Higgins, James	Final Review	Normal	<ul> <li>April 24, 2018</li> </ul>	ms2srmgr1
Review Update in Infa3	Final Review	Normal	<ul> <li>April 20, 2018</li> </ul>	ms2srmgr1
Review New data in Organization	Final Review	Normal	<ul> <li>April 20, 2018</li> </ul>	ms2srmgr1
<			_	
1 - 3 of 3 tasks		≪   Page 1 of 1		Tasks per page: 5

- 1. Quick filters
- 2. Column filter
- 3. Refresh icon
- 4. Table Settings icon

The following table describes the elements in the task inbox:

Inbox Element	Description
Filters	<ul> <li>Filters the tasks based on the filter criteria. You can use the following types of filters alone or in combination:</li> <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.
Туре	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.
	<ul> <li>The due date of each task is prefixed with one of the following colored dots:</li> <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.

# Start Page

If the **Data** tab is enabled for your environment and a **Home** page is not configured for your role, use the **Start** page as a data monitoring dashboard. The **Start** page contains a list of review tasks in the task inbox.

The following image shows the **Start** page with the default task inbox:

Ш	🔶 Informatica	BDD appl	cation with ActiveVOS									di	atas DataSteward
		▼ Task	s For Customer, Account, Automobile, Ho	usehold, Account Grou	ıp								
	Start										Filter of	Reassign Task Open Ta	ask 😏 💿
R	Data Q		Title 👻	Priority -	Due Date :	Task Type 👻		Owner -		Create Date 👻	Due Date 👻	Subject Area 🤝	
		₫					*		Q	1	17	17	-
	Bing search		Update Task	<ul> <li>Normal</li> </ul>	On Time	Update				12/Sep/2018	19/Sep/2018	Person	
	Data Quality		6-Sep UnMerge Task	<ul> <li>Normal</li> </ul>	Overdue	Unmerge				6/Sep/2018	13/Sep/2018	Household	
			6-Sep -Merge approval task	<ul> <li>Normal</li> </ul>	Overdue	Merge		datas		6/Sep/2018	13/Sep/2018	Household	
			6-Sep -UpdateWith approval task	<ul> <li>Normal</li> </ul>	Overdue	Update		datas		6/Sep/2018	13/Sep/2018	Household	
		Records	per Page: 25 💌				1 /	1 🕞 🗎					Total records.4

If the Task Manager is not enabled, when you click a task, the task opens in the **Data** tab. If the Task Manager is enabled, the task opens in the Task Manager.

# 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.
Туре	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> .

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

# Refreshing Data in the Home Page

Before you perform an analysis of the data in the **Home** page, refresh the components to ensure that they display current data. You can refresh all components at the same time, or you can refresh some of the components individually.

**Note:** Third-party components might refresh themselves periodically. If so, the refresh rate depends on the API provided by the third-party component. For more information, contact the MDM administrator.

Perform one of the following tasks:

- To refresh all the components in the page, refresh your browser instance.
- To refresh only the task inbox, click the Refresh icon.
- To refresh a chart with current data, click Recalculate.

# 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.

- 2. Select a quick filter for which you want to configure the columns.
- 3. Click Table Settings.

The Table Settings dialog box appears.

- 4. To add a column heading, in the Available Fields section, select a field and click Add.
- 5. To remove a column heading, in the Selected Fields section, select a field, and click Remove.
- 6. Click OK.

# Localizing Your User Interface

You can display all elements of the Data Director user interface in another language. All elements of the user interface are localized in the selected language. The localized elements are menus, buttons, navigation links, labels, error messages, and metadata.

1. Login to Data Director, and if prompted, select your application.

 From the application header, click your user name, select Change Language, and select a language. The Data Director user interface displays the selected language.

_wentbley_103				Pesquisar 🛛 🛛
nício 🗠				
Minhas Tarefas Abertas (1) Todos as Tarefas				Exibir Tudo
Titulo da Tarefa	Тіро	Prioridade	Data de Vencimento	Proprietário
		•		Digite o nome de usuário completo
Review New data in Person: John, MS2DemoTest	Final Review	Nomal	<ul> <li>April 30, 2018</li> </ul>	admin
1 - 1 of 1 samelas		≪  / Page 1 of 1    }>		Taraños por pág

# **Bookmarking Your User Interface**

You can choose to bookmark the Data Director user interface.

When you open, share, or refresh the required bookmark in the Data Director user interface, the bookmark capability allows you to remain on the same page. Bookmark prevents you from redirecting to the home page provided that you have the required user access and the URL is valid.

Similar to the bookmark of any other browser-based application, you can launch the Data Director user interface and choose to select the star or bookmark icon in the address bar to save the bookmark with an easily identifiable name.

You can bookmark severalData Director user interface sections and tabs, such as Business Entity views, Layouts, Matching Records, Network, Hierarchy, Job Monitor, Task Manager, additional custom pages, File import, AdHoc match, and drafts.

When you bookmark the search page, the bookmark appears for the search query used. After you open the bookmark, you can run the search query to view the search results again.

You can share the bookmark in the Task Manager and its associated tabs. You can choose to include bookmarks in the notification emails from the Task Manager.

# Part I: Data Director with Business Entities

This part contains the following chapters:

- Adding Business Entity Records, 35
- Working with Draft Records, 50
- Finding Records, 53
- Exporting Business Entity Records, 66
- Editing Records, 67
- Importing Bulk Data, 76
- <u>Resolving Duplicate Records, 89</u>
- Establishing the Best Version of the Truth, 99
- Investigating Data Changes, 103
- Investigating Relationships, 106
- Investigating Data Change Events for Effective Periods, 119

# CHAPTER 3

# Adding Business Entity Records

This chapter includes the following topics:

- Adding Records Overview, 35
- Adding a Person Scenario, 36
- Adding an Organization Scenario, 37
- Adding a Record, 37
- Adding a Record with Data from DaaS Provider, 39
- <u>Configure a Sibling Reference Lookup, 40</u>
- <u>Creating Records in the Data View, 47</u>
- <u>Copying a Record, 49</u>
- Exporting a Business Entity Record, 49

# 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.

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 have a red line.

#### Similar Records panel

If the record view contains the **Similar Records** panel, as you enter data in required fields, Data Director 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, Data Director can find and consolidate matching records for you.

#### DaaS Providers panel

If the record view contains the **DaaS Providers** panel, you can specify some basic information, such as the display name, and send the information in a request to a DaaS provider. The DaaS provider searches its database and returns a list of matching records. You can preview the data for each record. You can compare two or more records and specify which of the records you want to use to create the record.

### Data Validation in the Business Entity View

When a user adds or changes data in the **Business Entity** view, Data Director checks the data against metadata and, optionally, validation rules. The metadata defines the expected format for the data, such as the data type or the number of characters permitted. The validation rules are cleanse rules or Informatica Data Quality rules.

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

Validation processes run at the field level, section level, and entity level:

- Field level. When you add or edit data in a field in the **Business Entity** view, a client-side validation process verifies that the data satisfies the metadata. For example, when you enter a date in a Date field and then navigate away from the field, the process verifies that you entered the date in the expected date format.
- Section level. When you apply all changes in a section in the Business Entity view, a client-side validation
  process verifies that all data satisfies the metadata and that the required fields contain data.
- Entity level. When you save a record in the **Business Entity** view, a server-side validation process verifies that data satisfies the metadata, the cleanse validation rules, and the Informatica Data Quality rules.

If user input does not satisfy the metadata or the validation rules, you see messages about the problems with the data.

# Adding a Person Scenario

You are an insurance agent for a large insurance company. You have a new customer, Anthony Lomax, on the phone. You want to add Mr. Lomax as a record.

To add Anthony Lomax, you perform the following steps:

- 1. In the navigation bar, click New. Select Person as the business entity type, and then click OK.
- 2. In the Last Name field, you type Lomax. In the First Name field, you type Anthony.
- 3. In the Similar Records panel, you see a potential duplicate, so you open the similar record.

**Note:** The **Similar Records** panel only appears if the MDM administrator has configured the application to display the panel.

- 4. You confirm with Mr. Lomax that he is not the same person as the existing Anthony Lomax, and then close the similar record.
- 5. You finish adding Mr. Lomax's information in the form.

## Adding an Organization Scenario

You are with the marketing department of a company. You have a new customer, Time Warner which is an organization. You want to add Time Warner as an Organization business entity record.

To add Time Warner, you perform the following steps:

- 1. In the navigation bar, click New. Select Organization as the business entity type, and then click OK.
- Fill In the required fields for the DaaS provider. In the Display Name field, type Time Warner. The Display Name field is a required field.
- 3. Select the DaaS provider and click Go.
- Review the search results that the DaaS provider returns. You compare two or more records in the search results.
- 5. Select the records that are a potential match and click Use this to create the record.
- 6. If you do not find any potential matches, you close the search results, add data in the data entry form and click **Save** to create the record.

## Adding a Record

To add a record that uses the business entity model, start from the **New** tab in the navigation bar and select the type of business entity.

1. In the navigation bar, click New. In the New window, select a business entity type, and then click OK.

An entity tab opens and displays the data entry form for the business entity. A red line on a field indicates a required field.

2. For each required field in the form, click the field, and type a value.

Note: You can use the following conventions when adding text:

- 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 string includes any of the following special characters, add a backslash as a prefix to the special character: +, -, &, ||, !, (), {}, [], ^, ", ~, ?, :, \. If you do not add a backslash as a prefix to each special character, the search might return no results or incorrect results. For example, if you want to search for AT&T, the search string must be  $AT \$ 

The following image shows a sample data entry form for a Person business entity. The required fields are filled in.

New Person		2	3			
Quickly scroll to:	✓ Overview		Sc	146	Cano	el
Person	Party Type: Person	Middle Name:	First Name: James			1
Emails	Last Name: Smith	Birthdate:	Gender Cd:			
PhoneNumbers	Display Name: JamesSmith					
Addresses	Emails (O)			=		+
Person Details	<ul> <li>PhoneNumbers (0)</li> </ul>					+
	<ul> <li>Addresses (0)</li> </ul>					+
	<ul> <li>Person Details (O)</li> </ul>					+

- 1 Navigation menu
- 2 Required field indicator
- 3 Changed field indicator
- 3. If the Similar Records panel contains a list of similar records, review them.

**Note:** The **Similar Records** panel only appears if the MDM administrator has configured the application to display the panel.

- 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.
  - To review child records for the previewed record without discarding the work-in-progress entity, click **View Business Entity**. The previewed record opens in an entity tab.
- 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.
- 4. 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.
- 5. 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 the Create Child Record icon.

Fields appear where you can enter data.

- c. You can switch between a table view and a form view of the fields. Click the **Form** icon or the **Table** icon.
- d. Fill in the fields.

The following image shows a sample **Phone** section in the form view:

<ul> <li>PhoneNumbers (</li> </ul>	(1)					Ì		ļ
								<u>ش</u>
Do Not Call Ind:	Y	Phone Number:	647-555-1234	Phone Type:	HOME			
Phone Ext Number:	222	Phone Country Cd:	1					

2 2

1 Table icon. Click to view the fields within a table.

2 Form icon. Click to view the fields within a form.

3 Create Child Record icon. Click to add a child record to the selected record.

- e. Click the Apply icon.
- 6. 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.

## Adding a Record with Data from DaaS Provider

When you have Data as a Service (DaaS) integrated with the MDM Hub and configured for a business entity, the DaaS Providers panel lists the DaaS providers. Use the data provided by a DaaS provider to add your record. To add a record, start from the **New** tab and select the type of business entity.

- 1. In the navigation bar, click **New**. In the **New** window, select a business entity type, and then click **OK**.
- Fill in the required fields for the DaaS provider.
   For example, in the Display Name field, type Time Warner.
- 3. Move your cursor out of the Display Name field.

You can now select a DaaS provider.

- 4. In the DaaS Provider panel, request information about the record from a DaaS service provider.
  - a. Select the DaaS provider you want to use, and then click Go.

The DaaS provider returns the search results based on the display name of the organization.

- b. Investigate if a record in the search result is the one you want to add.
  - 1. Select the record and click **Preview**.
  - 2. If the data values do not match the record that you want to add, click Go back.
  - 3. Review all records in the same way.
- c. Optionally, if you want to compare two or more records, select the records, and then click Compare.
   The Compare page displays the data from the selected records.
- 5. Based on the result of the previous step, perform one of the following actions:
  - To add the data from the DaaS provider, select one or more entities from the search results or from the Compare page, and then click Use this. All entities are merged to form a single record. Continue with this record.
  - If the DaaS provider does not return results that match the entity you want to create, return to the tab
    containing the work-in-progress record, fill in the details, and click Save.

## **Configure a Sibling Reference Lookup**

You can configure a sibling reference lookup for Business Entity records in Entity 360.

### Sibling Reference Lookup Overview

Use the Sibling Reference Lookup feature to navigate and associate related Business Entity Records seamlessly within Entity 360. Without having to refer to Search for each association, the Sibling Reference Lookup function reduces time and effort to locate the impacted records.

Consider the following rules and guidelines to create sibling reference lookups:

- When a root Business Entity Record, like Informatica has multiple child entities, such as addresses or contacts, you can easily associate any child entity with another.
- The possible associations can be Saved to Saved, Saved to Unsaved, and Unsaved to Unsaved records.

**Note:** For unsaved to unsaved records association, it is possible to associate at the same level and not one level down. For example, for an unsaved parent record, you can't associate it with unsaved child because it is one level down. If the parent field is not saved, then it can't be linked with the child entity.

- Supported associations levels are child to child, child to grandchild, and grand child to grand child.
- If there exists a foreign key relationship between the entities involved, you can create associations.
- · For timeline-enabled child entities, similar associations apply regarding different versions.

### Sibling Reference Lookup Configuration

For a sibling reference lookup configuration in a business entity layout, you can configure a root to child lookup or choose to configure an associate sibling lookup.

### Configuring the Root to Child Lookup

The instructions explain how to configure the root to child look up when you have a business entity as a person having the person\_party as root and with the electronic address as the child field.

- 1. Add a new field to Party Base Object through the MDM Hub console.
  - a. Launch Hub Console.
  - b. Select any Operational Reference Store (ORS).
  - c. Navigate to the Schema from the Model.
  - d. Expand the Party Base Object
  - e. Click Columns > Acquire Write Lock

f. Add a new field.

For instance, add a new field called person\_email.

The following diagram shows a sample field creation:

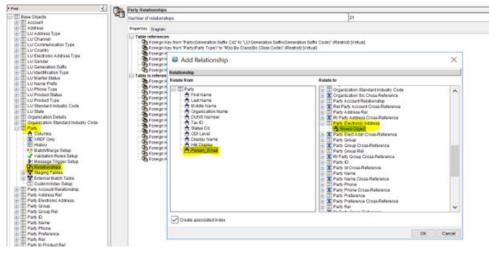
- other Homosyn.         - other           - concess         - other           - saget Turket         - other           - concess	Appart Appart Appart Appart United States United States Un	Party Commen Colores Double      Department      Departme	Popul Iana RONEL/RECT Mett./RECT Mett./RECT./ POLT./Wett Juli Juni	यता ई	i Dela Taja (creat Valicional		Paiker	Itala	t free	or Kin, 13 S				Articl Takan		n. 1674	
- other Homosyn.         - other           - concess         - other           - saget Turket         - other           - concess	See Capets Another Another Another Coll Another See Carlos and See Coll Control Control Coll Contro	Colords David Deve detectodore September A Insectodore A Insec	Popul Iana RONEL/RECT Mett./RECT Mett./RECT./ POLT./Wett Juli Juni	171	ID-MA Validnas	1 14		luis						(16) Talues		n. latin	
causes a planet of the second	Alteres Con-Alteres Tape Collisioner Collisioner Alteres Tape Collisioner Alteres Tape Collisioner Alteres Tape Collisioner Alteres Collisioner Frate Collisioner Frate Collisioner Frate Collisioner Frate Collisioner Frate Collisioner Frate Collisioner Frate	Dere an dermannen Engelen berei An Reseit Genet An Reseit Genet An Reseit Genet An Reseit Genet An Reseit Genet An Reseit Genet An Geneter Geneter	Popul Iana RONEL/RECT Mett./RECT Mett./RECT./ POLT./Wett Juli Juni	171	ID-MA Validnas	1 14		Date.						(Ad Talues		Pulative	
Anotan () Anotan ()	Converse Type Converse Type Converse the Type Converse Type	Bigling have Bigling have Bi	Popul Iana RONEL/RECT Mett./RECT Mett./RECT./ POLT./Wett Juli Juni	171	ID-MA Validnas	1 14		tuis.	Naritak.	Default	<b>1</b>	160 16	n. 14	(risk Takan		notes -	
nenny Ronger () contro Ronger	Lo Conversation Type Concerner La Youthers Advect Type La Youthers Advect Type La Youthers Advect Type Lo Youth Type Lo Youth Type Lo Paulo Type Lo Paulo Type Lo Paulo Type Lo Paulo Type	Anned Stand	Kover, search Kover, Helfor, (3 Pater, sover Latting search	171	ID-MA Validnas	1 14		luis .	No.	Default -	hut in	nan int	a. 10	trial takes	100	Pulative	
note Fanger () chartenge () metalogie ()	Unit Development Anteres Type Unit Sectors Anteres Type Unit Genotes Unit Genotes Staffs United Staffs United Staffs United Staffs United Staffs United Staffs United Staffs United Staffs	Anned Stand	Kover, search Kover, Helfor, (3 Pater, sover Latting search	171	ID-MA Validnas	1 14		-	1.00	1000	100	-	100				
Chertistaper del menositate del meno	Lu Construire Antéres Tope Lu Construire Suite Lu Construire Suite Lu Construire Suite Lu Torante Totale Lu Torante Totale Lu Torante Totale Lu Torante Totale Lu Totale Stale	A Nano Popla (d) A Truch Nano A Last Yann M Malas Tama M Same start (g/Truck)	Hare HEPS (3 Part June Lali June	B	VARCHAR									100	1000	(TT) (	
ne Style Ne	UD Generative fuith UD Generative fuith UD Harrier Marke UD Harrier Frank UD Harrier Frank UD Hostof Statue UD Hostof Statue UD Hostof Statue	A Protinere A Lastinere A Malariane A Generatoriante(d	Past June	÷Ð							DADAD	11	*			H-1	
na linuar di ina linuar di ina linuar di ina finar di	UL General advort hype Lu Hanne Heele Lu Hanne Heele Lu Heuse Type Lu Heele State Lu Heele Heele Lu Heele Heele Code	A Lastinana A Malda hana A Ganaratan Safta (Jr	141,444		3 ABCOVER	1.0					e l		* -				
ena polificad de Re de Re de Re fundare de Ange de Re	Londarie Politi Lo Phone Type Co Phone Type Lo Phone Type Lo Throad Type	🕈 limmatur iuffacia			A self-Croute	1 × 2					D I	HIE	3 -				
NE AND	Lo Phote Type Cur Phote State Cur Phote Style Cur Phote Style		HERLICH	R	KIND WE	1.0			1.1		21	HIE	2				
res a spert a man functions de segmen de	CorProduct Status CorProduct Type CorProduct Type		101034/101.0492.02	D.	s which wat	1.4					21	H 15	2				
ng Pantana Ar Anga Ar Artes Ar	T Lo Standard House Code		Decercontrati, Antel	0	LINGCOME.	20.0					Ž.		2				
100 E	T LU Mangard Houses Code	A DUAL NUMBER	D.PE, N.MER	1	a second	+ 4						HIP	-				
1745		A 1=0	Net_ID	2	inet.	+0					911	015					
	Cogenication Cetana	A Brook	BR1-Dx18		DH1								2				
	Organication Standard Triduate Code	A Service Cd	94444,00	Z	a ministration	1.4					21		2				
	- Course	A Date OF	inita,co	1	Del	20					M	415	4	-		-	
	C KREF CHE	A littland	BRUNE .	×	1.40(1948	H. P.					1411		41-	-			
k Droge	- C Bachberge Seta	A Data-tane	DIPLAT_NONE	M	valicies.	100 <b>Q</b>						Ц   }	4	H -			
1 Martin	Yandation Rules Deliup	A Internet	141,2591AF	브	sational	111-0			H		HI	H11	-	-			
es beur	Chiestope Trigger Setup	A Party Tate	Parts 798			110	-	_	M.	-			1				
Tanja Tanja	Stopping Tatries Externation Tatre	Terr (ter)		121	and the second s							-	-				
Destination	<ul> <li>Exempletation Table</li> <li>Codeminder Setup</li> </ul>																
	Parts Account Randomatria																
	Puts Allbeit Ref																
2	Puts Excelosi: Address Puts Cristal																
	Path Drive Rel																
	Fab D Pab Issie																
2	Path Plane																
	Tab Patence																
	Party Ref. Party Ref. Discontinuer																
2	Percel Original																
+	Poad																
	Probablished																
	T Products Product internal for																
	Plan the Cale																
	Rischerarchy Risc Rei Tran																
	Landing Tallies																

- 2. Establish a relationship from the person\_email to Electronic Address in the Party Electronic Address Base Object.
  - a. Under Relationships, select **Option > Acquire Write Lock**.
  - b. Click the **Add** icon.

The Add relationship dialog appears.

- c. From the Relate From panel, select person\_email.
- d. From the Relate To panel, go to Party\_Electronic\_Address > rowID Object.

The following image shows how you can add the relationship:



- e. Click OK.
- f. Select Release Write Lock.

g. Run the met validation.

The following validation image indicates the relationship created:

Table r	references
0	Foreign Key from "Party (Generation Suffix Cd)" to "LU Generation Suffix (Generation Suffix Code)" (Restrict) [Virtual]
- 0	Foreign Key from "Party (Party Type)" to "Rbo Bo Class(Bo Class Code)" (Restrict) [Virtual]
- (8)	Foreign Key from "Party(Last Row ID System)" to "MDM System(Rowid System)" (Restrict) [Virtual]
- 00	Foreign Key from "Party(Consolidation Ind)" to "MDM Consolidation Type(Consolidation Ind)" (Restrict) [Virtual]
9	Foreign Key from "Party(Gender Cd)" to "LU Gender(Gender Code)" (Restrict) [Virtual]
- Q1	Foreign Key from "Party(Name Prefix Cd)" to "LU Name Prefix(Name Prefix Code)" (Restrict) [Virtual]
- Uh	Foreign Key from "Party (Person_Email)" to "Party Electronic Address(Rowid Object)" (Restrict) [Virtual]
Table i	s referenced by
2	Foreign Key from "Party Group Rel(Party ID)" to "Party (Rowid Object)" (Restrict) [Virtual]
2	Foreign Key from "Party Account Relationship(Party ID)" to "Party (Rowid Object)" (Restrict) [Virtual]
- 05	Foreign Key from "Party Preference(Party ID)" to "Party (Rowid Object)" (Restrict) [Virtual]
-95	Foreign Key from "Person Details(Party ID)" to "Party(Rowid Object)" (Restrict) [Virtual]
- 05	Foreign Key from "Party Electronic Address(Party Id)" to "Party (Rowid Object)" (Restrict) [Virtual]
- 01	Foreign Key from "Party Name(Party ID)" to "Party (Rowid Object)" (Restrict) [Virtual]

- 3. To reflect these changes in the Provisioning, create a new lookup and enable the Sibling Lookup option.
  - a. Launch the Provisioning tool.
  - b. Select the Operational Reference Store (ORS).
  - c. Go to Modelling > Business Entities.
  - d. Expand the root level lookup field folder from the middle panel.
  - e. Create a new lookup.
  - f. Enter the Sibling lookup name and label.
  - g. Enable the Sibling Lookup.

The following image shows how to enable the sibling reference:

Home Business Entity - Configuration -		Database:	DS_UI1_105_HF1 (local 🗸 holds Decord Changes
1			
Modeling	Cross Delete	PrimaryPhone	
Business Entities 💌	Im Fields ♥ Node Filters ♥ Field Filters ■ One to One	Name:	Apply Decord PrimaryPhone
Create Copy Delate	Cone to Many  NullRels  BillAdlesses	Lobel:	Primary Phone
AccountGroup	Fields     Node Filters	Sibling Reference:	8
Automobile	Field Filters	Object:	Phone ~
Custom_BE	→ Address Fields	Constraint:	C_PARTY(PRIMARY_PHONE).C_PARTY_PHONE(ROW ~
Household	Node Filters     Field Filters	Lookup Display Field:	phoneNum ~
Organization	One to One One to Many	Required:	0
Person ProductAttribute	lookup Fields ♪ contryCode > stateCd	Default Value	+
SecureOrganization	AddressPermissionValue	Lookup Filter	+
SecurePerson	Dookup Fields		
TeaPhone	Ind  John  John		

- h. Go to **Objects > Select Emails**.
- i. On the Lookup display fields, go to Select Electronic Address > Apply Changes.
- j. Publish the changes.

4. Log into Entity 360 to use the Sibling Configuration with the magnifying glass icon as seen in the following screenshot:

≡	🔶 Informatica DSI	UI1_105_HF1							On	ganization ♀ Sec	arch	Q admin	0
÷	New	HARLEY, V	WILLIAM									:	-
۵	Home	Business Entity	Matching Records	Cross-reference R	ecords History	Hierarchy	Network						
	Queries										Submit	Discard	
	Search										_		
	Task Manager	Quickly scroll to:		<ul> <li>Overview</li> </ul>									
	My Jobs	Person					_					✓ ×	
•	New File Import	Noll Rels		Party Type:	Person	×	Bool_Ad:			Name Prefix Cd:			
H	Ad Hoc Match	<ul> <li>Bill address</li> </ul>		Last Name:	HARLEY		Middle Name:	WINTON		Cd:			
	Drafts	• Org		Display Name:	WILLIAM WINTON H	HARLEY	Birthdate:	1886-09-07 00:00:00	=	Gender Cd:	322223322	0.0	٦
4	HARLEY, WILLI 💿	e Email		Float_fld: Int_fld:			Tax ID:	1234567		Primary Phone:	Q 💼	Q 💼	
		Relative		DUNS Number:			Status Cd: First Name:	WILLIAM		Primary Email:	0		
		Person Names		Null Rels (0)								∃ ⊽ +	
		Ship addresses	5	<ul> <li>Bill address</li> </ul>					жин	Page 1 o	{3 M ₩ (1-5 c		
		Car		<ul> <li>Org (1)</li> </ul>								♡ +	
		<ul> <li>Telephones</li> </ul>		Email (1)								∄ ⊽ ₽	
		Details		<ul> <li>Relative (0)</li> </ul>								♡ +	
				Person Names	(11)							≣ ⊽ ±	
				<ul> <li>Ship addresses</li> </ul>	(0)							⊽ +	
				• Car (0)								₹ .	
				<ul> <li>Telephones</li> </ul>					KK K	Page 1 o	f3 🕺 💓 (1-5)	sf 11) 🛛 🗐 🛨	
				Details (1)								≣ 🖓 ±	

5. Click on the magnifying glass icon to see the list of email IDs created for a specific person.

The following image displays the list of email IDs created for a specific person:

Emails (1)				⊽
Eactronic Address	is Volid ind	Bectrunic Address Type	Opr in Ind	
enall@gnal.com	1	EMAIL	1	
				OK Concel

6. Select one the emails added and click **OK**.

In the example, since you selected the Lookup display field as Email Address in Provisioning, the value displayed in the **Person\_Email** field is emaill@gmail.com as seen in the following image:

of lever phis	<ul> <li>PersonView</li> </ul>								
watter									00
oreNumbers	Fary Trigene:	parice.		Deploy Name	genomone		to WP field		
-	Last Norme	100		Job Tife:			Marketry Segment		
	Muldle Name			Education Level Call			Hate Ownedap		
desses.	Britaine			Distance of Second			Nomber of Children		
	Gender Cd.			PenaryLanguage			Person_Enall	and Specifican	0,0
	HoseNumbers	[0]							
	<ul> <li>Encole (1)</li> </ul>								
	Electronic Address		to Walled Indi	Heats	unic Address Type	Oprinishd			
	anal tiped can		1	EMA	4	1			0 2
	<ul> <li>Addresses (0)</li> </ul>								#1v10

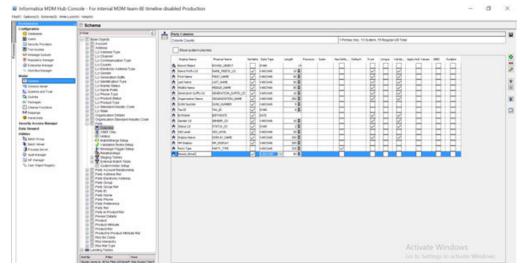
### Configuring the Associate Sibling Lookup

To configure the associate sibling lookup, ensure that you create a new field in the Business Object that requires to be associated with its child or sibling.

1. As part of the creation stage, create a new field that you want to associate with its child or sibling.

For example, you want to associate Party with Email.

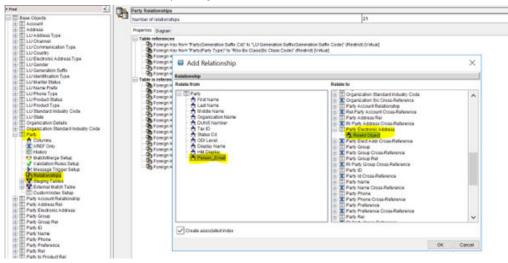
The following image shows how to create the **Person\_email** in the **Party** business object:



2. Set up a Foreign Key relationship in the Business Entity.

For example, establish a foreign key relationship between the **Person\_Email** and the **Party Electronic Address Rowid Object** on the Add Relationship dialog box.

The following image shows how to establish a foreign key relationship on the **Relate from** and **Relate To** sections on the Add Relationship dialog:



The following diagram shows the foreign key table references that you create from **Person\_Email** to the **Party Electronic Address Rowid Object** on the Add Relationship dialog box:

Properties	Diagram
- Table r	eferences
9	Foreign Key from "Party (Generation Suffix Cd)" to "LU Generation Suffix (Generation Suffix Code)" (Restrict) [Virtual]
- 0	Foreign Key from "Party (Party Type)" to "Rbo Bo Class(Bo Class Code)" (Restrict) [Virtual]
- 6	Foreign Key from "Party (Last Row ID System)" to "MDM System(Rowid System)" (Restrict) [Virtual]
-05	Foreign Key from "Party (Consolidation Ind)" to "MDM Consolidation Type (Consolidation Ind)" (Restrict) [Virtual]
-95	Foreign Key from "Party (Gender Cd)" to "LU Gender(Gender Code)" (Restrict) [Virtual]
- 9	Foreign Key from "Party (Name Prefix Cd)" to "LU Name Prefix (Name Prefix Code)" (Restrict) [Virtual]
- Ch	Foreign Key from "Party (Person_Email)" to "Party Electronic Address (Rowid Object)" (Restrict) [Virtual]
Table i	s referenced by
- (2)	Foreign Key from "Party Group Rel(Party ID)" to "Party (Rowid Object)" (Restrict) [Virtual]
- 00	Foreign Key from "Party Account Relationship(Party ID)" to "Party (Rowid Object)" (Restrict) [Virtual]
- 95	Foreign Key from "Party Preference(Party ID)" to "Party(Rowid Object)" (Restrict) [Virtual]
- 00	Foreign Key from "Person Details(Party ID)" to "Party(Rowid Object)" (Restrict) [Virtual]
- 05	Foreign Key from "Party Electronic Address(Party Id)" to "Party (Rowid Object)" (Restrict) [Virtual]
20	Foreign Key from "Party Name(Party ID)" to "Party(Rowid Object)" (Restrict) [Virtual]

3. On the Provisioning tool, create a new lookup field with the new relationship.

For example, create a new lookup field under the Business Entity that has the foreign key relationship with email, which is the **Person\_Email** business entity.

4. Select the constraint as the new relationship configured in the MDM Hub Console before you apply the changes and publish.

For example, the Sibling or Child reference in the new field added to the Provisioning tool.

The following diagram shows the Lookup display field selected whose value displays in the associated lookup field:

generation	Penan	(New Lookup Field)		
hoises fetter	1.000	Course and courses		Ander David
	C faile	Name	PersonEmail	
	V. Picole Phery ∇ Field Riters	tabel	Person, Ernall	
cours -	Charles Deer	Siking or child relevance:		
inducard	En Lookup Table	Chart	Enails	14
tonahild	E provid	Construct		
Agarization.			C, PWRTY(PERSON, EMAK, ) C, PWRTY	ELECT ADDAGAD
		Locksp Eligitry Field	electionicAddress	~
ndutGroup		Ingind	0	
tradiente				

5. Add a new field in the Business Entity View.

The following image shows how to add a new field in the Business Entity View:

Image: Second large for the second	lodelng	PersonWew	PersonEmail	
Com         Com         Defendence         Priority and the set of the	Business Sittly Views .		Dates	
Import         Import<	Crum Cruy Dalay	General Anna		nonEmail
Lefding         Depends On           Bankold         Bankold           Bankold		(b) InstPrinter	Label P	ran, Ema
Bit which figs         Diplicity from at           Dependent programs         Diplicity from at           Defendent programs         Diplicity from at		in suidfaftione Inchiden	Departs On	÷
Bit which figs         Display format           Description         Bit which figs         Display format           Description         Bit which figs         Bit which figs		<ul> <li>gandartal</li> <li>dagleybiana</li> </ul>		*
Bit which figs         Diplicity from at           Dependent programs         Diplicity from at           Defendent programs         Diplicity from at		ph/ter schoolselend".d		
Odc/Chapilves         Instanty Separat         Langh           Data/Chapilves         Is and/Chapilves         Isingle           Data/Chapilves         Isingle         Isingle	Ingentication View	10 advectiginger	and the second	*)
i boschewing ingen obschewing ingen Neutro Obleen boschewing ingen		in pressry (congression in a Vigotad	Display format:	<u>ب</u>
Recording Lond Dyn.	odu:CrogVee	a marketing/segment	langth	
	oductiVew		Soul Days.	
Cone to Many Processo Digits		Cha to One		

6. Add a transformation for the newly created field.

		1 Saverane	tati nume	
analomiations	Person, Person/View	diqlayNarie	diglasharie	
Restrain Entry to View +		PersorDetails[1].e	maketinglegner	
Internal Design	in Perce Percellen	middlefiame	middefiame	
	P Instantion	birthdatw	bethdate	8
Account_AccountMane CountrCount_CountMane		PersonDetails[1].g	primaryLanguage	
IntelCont_ContRes		ParsonDetails[1].e	entreeding Type	
Organization, Organization/Kew		genderCd	genderCut	
Seat Provide and		PersonDetails[1].e	educationLevelCal.	
hole:Group, hole:GroupVew		PersonDetails[1].n	avipind	
holes, fuductives		PersonDetails[1].n	numberOfChildren	
		PersonDetails[1]/h	honieOwnenship	
		PersonDetails[1],r	pataw	
		PersonErrol	Activate Windows Gents Settings to activate	

The following image shows how to add a transformation for the new field in the Business Entity to View:

The following image shows how to add a transformation for the new field in the View to Business Entity:

	The second secon	and control in the	An incomentation in	
Iranaformations	PersonView_Person	Sesthame	fechane	
They to Bushess Bally -		e0.catorLeveCd	PersorDetails[1] e	
States Street	EP Perceillen Perce	lactNotes	lastName	
	in bandonatana Bandan	wVpled	PersonDetails()(in	
Account/New_Account		numberoficivilizien	PersonDetails[1].n	
CwdrCor/New_Cod/Cod		distañine	dopleyName	
Husahol Men, Hosahold Organizaturi Men, Organizaturi		mailuttirg5ogmen	PersonDetails[1],n	
Annual		misseName	middelsame	
hodie:GroupView, hodie:Group		brthdate	bethduce	
Podastillaw, Podosti		homeOwnership	PersonDetails[1].h	
		jobTitle	PersonDetailed1()	
		genderCd:	genderCa	
		PersonErnal	Activate Mindaws Goto Settop to activity	

- 7. Apply and publish the changes.
- 8. Verify the associated sibling lookup field in the Informatica Data Directory.
- 9. Create a new Person business entity.

The following image displays the configured sibling lookup field:

New	1 New Person									
None Overlag										hand David
Task Manager	Onibly and in	• Person/View								
-	• Percertine									20
New Tile Import	· Roselinian	First Normer	parters		Digloy Nation	Incidente		h VP ind		
Addres Match	• teah	Loui Nume	100		pub Tala			Malating Jegenni		
Delta	@ Addressey	Malan Nume			Silventres Lovel Cill Dilatetty Typer			None Danetike Nonker al Children		
New Parson 0		Gaudier Cit			Remory Longarage:			Second and Contract		
		+ PoseNumbers	900						COV OF	#1701C
		· Emails [1]								#1010
		Eachtrait Address		In Walted Intel	Sam	eric Address Type	Oprining			
		and ingest con		1	544		1		1	018
		Addresses (0)								#1010

10. Click on the magnifying glass icon to see the list of email IDs created for a specific person.

The following image displays the list of email IDs created for a specific person:

arch				
Emails (1)				∇
Electronic Address	Is Volid ind	Electronic Address Type	Opr in Ind	
enal)@gnal.com	1	EMAIL	1	
				OK Concel

11. Select one the emails added and click OK.

In the example, since you selected the Lookup display field as Email Address in Provisioning, the value displayed in the **Person\_Email** field is email10gmail.com as seen in the following image:

and large glasses	<ul> <li>Person/View</li> </ul>								
PersonWaree									00
horeNumbers	Fey Hame:	(parice)		Deploy Name:	personane		is WP fed		
sub	(and Notice)	1946		Joli Tife			Marketry Segment		
Advesses.	Mulde Name			Bilocation Level Cit:			Hate Ownerdep:		
ddream.	Britan		=	Divisity Type			Number of Children		
	(Gender Cd.			PenaryLanguage			Percenteral and	- Organization	Q
	PhoneNumbers	E01						13	
	• Enable(1)							8	1-10
	Electronic Address		to Walled Inel	liste	mic Address Type	Oprinishi			
	eval i typed com		1	EMA	l.	1			010
	<ul> <li>Addresses [0]</li> </ul>							13	1

### Verify the Associate Sibling Lookup

You can verify the associated sibling lookup reference in the Informatica Data Directory where you can create, associate, select, and view a business entity.

## Creating Records in the Data View

To add a record based on a subject area, start from the **New** tab and select the subject area. The MDM administrator defines the subject areas and the types of data that you need to enter for the subject area.

In the navigation bar, click New. In the New window, select a subject area.
 For example, the application for an insurance company defines a Person subject area within a Customer subject area group. To add Anthony Lomax as a customer, a business user clicks New and then selects Customer > Person.

The **Data** tab contains a **New Person** tab with an empty data entry form. A field name with a red asterisk indicates a required field.

- 2. For each required field, click the field and type the value.
- 3. For each optional field for which you have data, click the field and type the value.
- Optionally, type the URL to an image file in the image\_url field. For best results, link to an image that is a maximum of 200 x 200 pixels.

**Note:** For images, the MDM Hub stores the URL, not the file. If the location of the file changes, you must update the URL.

The following image shows some data for a record:

son									Ca	Open i	Hierarchy
	▼ New Person 🖋										
	Required Input									Apply	
	image_url	http://abc.com/images/k	omax_anthony.png		Name Prefix Cd			First Name *	Anthny		
	Middle Name				Last Name *	Lomax					
	Generation Suffix Cd	× •			Birthdate	10/Aug/1965		17			
	Gender Cd				Tax ID			Display Name			
	Preferred Phone			Q 🐹	Int_fid			Bool_fld			
	Float_fid			1							
	Address				Nickname	Tony		Job Title	Manager		
	Marital Status	SEPARATED -			Birth Last Name	Lomax		Birth City			
	Birth State				Brith Country Cd			Birth Postal Cd			
	Criminal Record	No			Death Date		17	Education Level C	a		
	Ethnicity Type				Is Employee Ind			Is VIP Ind			
	Primary Language	English			Eff Start Date	3/Jul/2015 12:00	17	Eff End Date		17	
	Remarks	crigion				3/30/2013 12:00	17			17	

5. Click Apply.

The application validates the data. If there are errors, correct them.

- 6. Add data to sections in the **Data** view.
  - a. Expand a section, such as Address or Telephones.
  - b. Click the Add icon.
  - c. Fill in the fields.

The following image shows the Telephones section:

Telephones <sup>⋆</sup>		
* Required Input		Apply 🥥 🗙
This entity has been created but it is not saved!		
Phone Country Cd		
Phone Number	555-1234	
Phone Ext Number	1212	
Is Valid Ind	C Enable	
Eff Start Date	10/Aug/2015 12:00	
Eff End Date	17	
Do Not Call Ind		
Phone Type	HOME 🔻	
	Record 1 of 1 🕢 🕨	

- d. Click Apply.
- 7. If you need to change the value of a field, click the Edit icon, edit the fields, and click Apply.
- 8. After you finish adding data, save the data.
  - If your user role permits you to save data without a review, click **Save**. The application saves the record to the MDM Hub Store in active records.
  - Otherwise, click **Send for Approval**. In the **Create Task** dialog box, review the task details, edit the details as required, and click **OK**. The application saves the record in pending records and initiates a review process.

## Copying a Record

You can copy a business entity record, modify it, and then save it as a separate record. To copy a record, you need to have permission to create records. When you copy a record, the values from read-only fields are not copied. Read-only field values are populated automatically with default values or remain empty. For example, a record can include a unique customer ID field that is populated automatically. When you copy a record, the customer ID value is not copied. The field remains empty. After you save the record, the customer ID value is populated automatically.

- 1. Search for the record that you want to copy, and then open it.
- 2. From the Actions menu, select Copy.

A copy of the record is displayed.

- Change the values based on your requirements. For example, modify the name, address, or email address.
- 4. Click Save.

## **Exporting a Business Entity Record**

In the Business Entity view, you can export a Business Entity Record and its related Business Entity records as a PDF.

To export a Business Entity, click Download as PDF.

The following image shows a sample Business Entity View.

Figure 1.

and the second se	erena erenar	and an and a second of the					Delete
Business Entry Matching	g Records Cross-refi	arence Records History	Hierarchy Netw	ork			Corv
erles							Download as PDF
rch							
Menoper Quickly scroll to:	<ul> <li>SecurePerso</li> </ul>	nView					
Joba SocurePersonView							0
+ File Import	None Pefx Cd	DR	Marital Status	MARRIED		is VIP Ind.	1
Hae Match	First Name.	WILLIAM	Birth Lour Nome:	JACK		Primory Language:	ENGUSH
da .	Birthdate:	1886-09-07 00:00:00	Bath Cay:	Milwokee		Eff Start Date:	1887-08-16 12:00:00
REY,WILL.	Tox ID:	1234567	Birth Secret:	wi		(If End Date:	1908-08-25 12:00:00
e Car	Middle Name:	WINTON	Brith Country Cd.	USA		Remarks	Inventor of DUO engine, founder of .
© Crg © Nidi Rels	Los Nome	HARLEY	Birth Postol Cd.	1		Electronic Address:	harley@harley-davidson.com
	Generation Suffix Cd		Criminal Record:	Yes		Is Volid Ind:	1.
	Gender Cd.	MALE	Death Date:			Eff Stars Date:	1947-08-19 00:00:00
	Display Name:	WILLIAM WINTON HARLEY	Education Level Cd	HIGH		Eff End Date:	2008-09-17 00:00:00
	Nicknome:	WILL	Ethnicity Type	AMERICAN		Electronic Address Type:	EMAIL
	Job Tale	FOUNDER	h Employee Ind	т.		Opt in Ind:	1
	<ul> <li>Names (11)</li> </ul>						≅ ⊽ Œ
	Telephones				HH H Page		₩ (1-5d11)   ♡   E

## CHAPTER 4

# Working with Draft Records

This chapter includes the following topics:

- Working with Draft Records Overview , 50
- Adding a Draft Record, 51
- Editing a Draft Record, 51
- Submitting a Draft Record , 51
- Filtering Draft Records , 52
- Deleting Draft Records, 52

## 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.

Ξ	🔶 Informatica				Person 🗢 Search	Q admin
	New	🗎 Drafts				
۵	Home					
Q	Queries				I	Delete All ↓↑• 🕈
	Search	Filter Add Field 🔻				
	Task Manager	Entity Type	Title	Create Date	Update Date	
	My Jobs	Person	Draft For Person: Bond,	2021-07-14 12:13:16	2021-07-14 21:00:58	
*	New File Import	Organization	Draft For Organization	2021-07-14 12:33:36	2021-07-23 11:12:06	
×	Ad Hoc Match	ProductGroup	Draft For Productgroup	2021-07-23 11:24:16	2021-07-23 11:24:48	
	Drafts	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	

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

## Adding a Draft Record

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

- 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.
- 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.
- 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, 53
- Using the Search Box to Find Records, 55
- Using Queries to Find Records, 58
- Managing Queries, 62
- Migrating and Sharing Saved Queries, 64
- Filtering Child Records, 65

## **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	2	3	4 5
		All	Q. admin
		<b>Ai i i c c c c c c c c c c</b>	ddillin
earch			Ð
arch john smith			
earch Results (35)		Group By: None T	lter Filter
Name	Description Type		Apply Filte
General Electric Co.	Duns Number: 001367960, Entity Type: Organization, Display Name: General Ele Organization	n (V)	
Ge Generators - Pensacola	Entity Type: Organization, Display Name: Ge Generators - Pensacola, Address Line Organization		4 Type
Household	Group Name: Smith Household, Rel Type Code: contains member, Hierarchy Code: Household		All Household (9)
Household	Group Name: Smith Household, Rel Type Code: contains member, Hierarchy Code: Household		Organization (2)
Household	Group Name: McCartney Household, Rel Type Code: contains member, Hierarchy Household		Person (24)
Household	Group Name: Gonzalez Household, Rel Type Code: contains member, Hierarchy C.,, Household		
Household	Group Name: Smith Household, Rel Type Code: contains member, Hierarchy Code: Household		-
Household	Group Name: Smith Household, Rel Type Code: contains member, Hierarchy Code: Household		-
Household	Group Name: Rapp Household, Rel Type Code: contains member, Hierarchy Code: Household		✓ Person
Household	Group Name: Rogers Household, Rel Type Code: contains member, Hierarchy Cod Household		Entity Type
Household	Group Name: Gonzalez Household, Rel Type Code: contains member, Hierarchy C Household		✓All
John Smith BASC	Entity Type: Person, Display Name: John Smith BASC, Last Name: Smith, Gender C Person		Person (24)
John K Smith	Entity Type: Person, Display Name: John K Smith, Last Name: Smith, Gender Cd: M Person		Display Name
John M Smith	Entity Type: Person, Display Name: John M Smith, Last Name: Smith, Gender Cd: M Person	•	All
Ronald Smith	Entity Type: Person, Display Name: Ronald Smith, Last Name: Smith, Gender Cd: M Person		John Brown (1)
Tonya Smith	Entity Type: Person, Display Name: Tonya Smith, Last Name: Smith, Gender Cd: F Person		John K Smith (1)
Darlene Smith	Entity Type: Person, Display Name: Darlene Smith, Last Name: Smith, Gender Cd: F Person		John Gusiff (1) John M Rogers (1)
Elvin Smith	Entity Type: Person, Display Name: Elvin Smith, Last Name: Smith, Gender Cd: M Person		Elvin Smith (1)
Steve Smith	Entity Type: Person, Display Name: Steve Smith, Last Name: Smith Person		John Gonzalez (1)
Ronald Smith	Entity Type: Person, Display Name: Ronald Smith, Last Name: Smith, Gender Cd: M Person		john thomas (1)
James Smith	Entity Type: Person, Display Name: James Smith, Last Name: Smith Person		Tonya Smith (1)
Joe Smith	Entity Type: Person, Display Name: Joe Smith, Last Name: Smith Person		00+/33

- 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 Data Director 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 John, such as John, John Smith, John Anderson, and John Anderson Smith.
John Smith	Searches for records that contain John or Smith or both John and Smith, such as John Smith and John Anderson Smith.
John Anderson Smith	Searches for records that contain at least two of the terms that constitute the search string, such as John Smith, John Anderson, and John Anderson Smith.
	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 ${\tt Jo}$ and ends with <code>n</code> , such as <code>Johansson</code> and <code>Jordan</code> .
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, 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.

### **Customizing Search Results**

You can customize the search 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 Search Columns dialog box appears.

- 2. Move the fields that you want to display in the Search Results panel to the Selected Columns section.
- 3. Optionally, change the order in which you want the fields to appear in the search results.
- 4. Click OK.

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

5. To sort the search results, click a field name in the header.

The results are sorted in the ascending order, and an upward arrow appears beside the field. If you click again, the results are sorted in the descending order, and a downward arrow appears beside the field. If you click again, the results are not sorted based on the field value, and the arrow disappears.

**Note:** When you customize the search results, all the preferences are automatically saved for each business entity. When you perform another search on the business entity later, the search results appear based on your preferences.

### 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.		

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.

**Note:** If you query for a record that contains multiple versions, the latest record version appears along with all the other versions. To view all the record versions, expand the latest version.

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** views 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.

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 following views might be available in the Data Director application:

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.

5. To sort the search results, click a field name in the header.

The results are sorted in the ascending order, and an upward arrow appears beside the field. If you click again, the results are sorted in the descending order, and a downward arrow appears beside the field. If you click again, the results are not sorted based on the field value, and the arrow disappears.

**Note:** When you customize the query results, all the preferences are automatically saved for each query. When you run the query later, the query results appear based on your preferences.

#### **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.
- Select the query, and then click Actions > Delete.
   The delete confirmation dialog box appears.
- 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.

## Migrating and Sharing Saved Queries

When an MDM administrator migrates a Data Director configuration from one environment to another, the saved queries are not migrated. You need to export the queries from the source Data Director application and then import the queries into the target Data Director application.

You can migrate all the saved queries in the application or migrate individual saved queries. When you migrate queries, if the target application contains queries that have the same names as the queries in the source application, the queries are renamed. For example, if a query with the name PersonQuery already exists in the target environment, the query is renamed to PersonQuery 1.

Also, you can share the saved queries with other users, who can import the queries into their application. You are the owner of the queries that you import into your application.

### Migrating and Sharing all the Saved Queries

To migrate all the saved queries, export the queries from the source Data Director application and then import the queries into the target Data Director application. Also, you can share all the saved queries with other users, who can import the queries into their environment.

1. From the Saved Queries panel header, click the Export icon.

A Queries.json file, which contains all the saved queries, is downloaded to the default download location.

- 2. Import the JSON file into the target application.
  - a. Copy the downloaded JSON file to an accessible location in the target application environment.
  - b. From the Saved Queries panel header, click the Import icon.
  - c. Locate and import the queries JSON file.

All the saved queries are migrated to the target environment.

### Migrating and Sharing a Single Saved Query

To migrate a saved query, export the query from the source Data Director application and then import the query into the target Data Director application.

- 1. From the source application, export the query that you want to migrate.
  - a. In the Saved Queries panel, expand the business entity to which the query to export belongs.
  - b. Select the query, and click Actions > Export.
  - A Queries.json file, which contains the saved query, is downloaded to the default download location.
- 2. Import the JSON file into the target application.
  - a. Copy the JSON file to an accessible location in the target application environment.
  - b. In the target application, from the Saved Queries panel header, click the Import icon.
  - c. Locate and import the JSON file.

The saved query is migrated to the target environment.

## **Filtering Child Records**

In a Business Entity view, you can filter records based on the field values of the child or grandchild records. 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.
- 2. Click the **Filter** icon.

Filters popup appears. The following image shows a Business Entity filter.

	Null Kets (U)		a 1
ickly scroll to:	<ul> <li>♥ 8il oddress (1)</li> </ul>	Fibers	⊙ 6100
Parson	Films by		Moddly 7.8w
Relative	Address/Permanent/Cal	Filer by	
Cor	(peret	• 💌 Bill address	
Telephones	• Bill address 1	• 🖾 Address	38
Debals Null Rele	Opt is Ind Address Type	Permissions     Column 1	Professed Ind
	1 881	Column3	0
54 oddeen	▼ Address (1)	Column2	10 I
Oru	✓ Address 1	Address Use     Number, fid	31
Email	City Nome Floot_Bd	Deept N Column 1 Column 3	Lothude County Name
Nones	AF 10		1 90 01
Ship addresses		Column2	
	✓ Permissions (1)	i w_fid	12 I 2
	Column 1	□ Nchar_Rd	
	peml	NVarbar2_8d	01
	<ul> <li>Address Use (1)</li> </ul>	Stote code	12   pol
	Service	04	Concel IN H Page   of 2 N IN (1-5 of 6) 😲
	• Org (0)		
	<ul> <li>Email (7)</li> </ul>		······································

3. Select the filter criteria, and click OK.

The filters are applied, and the records that satisfy all the filter criteria are displayed.

## CHAPTER 6

# **Exporting Business Entity Records**

In the Business Entity view, you can export a business entity record and its related records as a PDF. To export a business entity and its related records in the Business Entity view, click **Download as PDF** menu. The following image shows a sample Business Entity view with Download as PDF menu:

me Burnin Free Marking	2010 2003			121			Delete
eries	g Records Cross-refi	irence Records History	Hierarchy Netw	ork			Copy
sus la							Download as PDF
arch Quickly scroll to:	▼ SecurePerso	nView					
Monoger     Greatly scretters     SecurePenor/Vew							
Jobs							0
• File Import	None Pafix Cd	DR	Marital Status:	MARRIED		is VIP Ind.	1
Hoe Match	First Nome.	WILLIAM	Beth Lour Nome:	JACK		Primory Language:	ENGUSH
dte	Birthclate:	1886-09-07-00:00-00	Bath Cay:	Milwakee		Eff Start Date:	1887-08-16 12:00:00
RLEY/WILLI	Tox ID:	1234567	Birth Store:	Wi		(IF End Date:	1908-08-25 12:00:00
e Car	Middle Name:	WINTON	Brith Country Cd.	USA		Romarks	Inventor of DUO engine, founder of
© Crg © Null Rels	Los Nome	HARLEY	Birth Postol Cd.	1		Bectronic Address:	harley@harley-davidson.com
	Generation Suffix Cd		Criminal Record:	Yes		Is Volid Indi	1.
	Gender Cd:	MALE	Death Date:			EFF Sears Drate:	1947-08-19 00:00:00
	Display Name:	WILLIAM WINTON HARLEY	Education Level Cd	HIGH		Eff End Date:	2008-09-17 00:00:00
	Nicknome:	Will	Ethnicity Type	AMERICAN		Electronic Address Type:	EMAIL
	Job Tale	FOUNDER	Is Employee Ind	1		Opt in Ind.	1
	<ul> <li>Names (11)</li> </ul>						≣   ▽   Œ
	Telephones				HI H Page 1	4.9. 14	₩ (1-5 of 11)   ♡   단

## CHAPTER 7

# **Editing Records**

This chapter includes the following topics:

- Editing Records Overview, 67
- Editing a Single Record, 67
- Edit Multiple Records, 69
- Adding and Editing Related Records, 71
- Deleting a Record, 74

## **Editing Records Overview**

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

If your user role permits it, you can edit data within a record or delete a record. When you save changes, based on your user role, a review process might be initiated. 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.

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

## 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.

### Scenario for Editing a Record

A customer named John Smith reports that he did not receive the product that you mailed to him. You want to check his address, correct errors, and redirect the product to the correct address.

You find the record for John Smith, which you select and open to view the address. You find that the address has an incorrect postal code. After you correct the address, you close and save the record. You ensure that you resend the product to the correct address.

### Editing a Record

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

You can edit only the root record or child records that do not have any pending changes. A yellow pending icon indicates whether a record contains any pending changes.

1. From the Search Results panel of the Search page, open the record that you want to edit.

The record opens in a record view.

- 2. If this is not your preferred view for editing, select a different tab.
- 3. Click Edit.

**Tip:** If the button is disabled, you may not have permission to edit the record or the record has changes that are pending approval.

The following image shows the record for Edward John McNair, in edit mode. The record also contains a child record that you cannot edit because it has pending changes.

son PersonView Mat	ching Records Cross-reference Records History Hierarchy Network	
tuickly scroll to: ) Person	Overview	Edit
) Null Rels	Porty Type: Penson DUNS Number: Tax ID: Last Name: MCNAIR Generation Suffix Stebus Cd:	
Bill address Org	Diploy Name: EDWARD JOHN MCNAIR C.d. frint Name: Float_fld: Bool_fld: Gendar Cd:	EDWARD
Email	Int_Rd: Middle Nome: JOHN Nome Prefix Cd: Birthdate:	
Relative	Null Rels (0)	88 - 1
Names	Bill address (1)	88
	ontains data that is pending Eff Start Date ~ Eff End Date Opt In Ind Preferred Ind Address Type S	Status Cd
Car	0 2002-04-08 00:00:00 2999-12-31 23:59:00 BILL	
Telephones	• Org (0)	88
Details	Email (0)	88
	<ul> <li>Relative (0)</li> </ul>	88
	<ul> <li>Names (0)</li> </ul>	88 - 3
	<ul> <li>Ship addresses (0)</li> </ul>	88 - 3
	► Car (0)	88

- 4. Edit the data in the root record as required.
  - a. Click anywhere in the top section.

The section becomes editable.

- b. Edit the data.
- 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 Save.

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 a 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.

### **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.

Find in: First Name . Adam Find Replace with: \* Replace All Party Type Last Name Float fld Int fld Party Typ he Display Name Display Name Float\_fld Person ADAM GRAY Int\_fld DUNS Numbe Person ADAM BOSH Bool\_fld Middle Name Person SAMIR ADAM Birthdate Person Tax ID MISS MARY ADAM Status Cd MICHELLE ADAM Person First Name Gender Cd Name Prefix Cd Null Rels Bill address Org Email ۲ Relative

The following image shows how to select a column and enter the search value, Adam:

**Note:** To use the Find and Replace operation for lookup and dependant lookup fields, you must enter a value in both fields. For example, if you want to replace the Country lookup field and the State dependent lookup field, you must enter a search value in the lookup and dependent lookup fields.

5. Click Find.

The search results show only the records that match the specified value. The following image shows the search results.

8	New	🔍 Fir	nd and Replace Record	ls for PersonView				8
Q		Find i	n: Select a column		Find	Replace with:	Replace All	
Q		_						
		0	Name Prefix Cd	First Name	DUNS Number	Middle Name	Last Name	- >
6			MISS	MARY			ADAM	.
٠	New File Import			RAYMOND			ADAM	
M	Ad Hoc Match			LONG LONG LONG LO	ING LON		ADAM	
<b>B</b>	New Person	0		MICHELLE			ADAM	
	Find and Replace			SAMIR			ADAM	
<b>_</b>								·

- 6. In the **Replace with:** field, enter the new value.
- 7. Click Replace All.

A message confirms that you want to replace the records.

8. Click Replace All.

A message displays the number of records replaced.

### Viewing the Status of a Bulk Edit

You can use the Job Monitor to review the status of current and past bulk edit jobs. A Bulk Edit batch job runs when the **Find-Replace Execute** privilege is selected, in the **Resource Privileges** page in MDM Hub Console. When the privilege is not selected, the asynchronous job will not run.

- 1. From the navigation menu, select Job Monitor.
- 2. Click the Bulk Edit tab.

The bulk edit jobs are organized with the most recent job at the top of the list.

Find the job with the current date and time.

4. Review the job status. The following table shows the possible statuses.

Status Message	Description
Success	All records updated successfully
In progress	Records are updating
Warning	Not all records updated successfully
Error	Bulk edit job failed to initialize

- 5. If the job ends with warnings, expand the job details and click the number in the **Failed** column. A description of the errors appear in a .CSV file.
- 6. Correct the errors and run the bulk edit job again.

### 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.

## Adding and Editing Related Records

Business entity relationships describe the affiliation between two entities. The MDM Hub supports one-tomany 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. For example, Organization employs Person is a relationship that exists between the Organization and Person business entities. You can add Person records or employees as related records to the Organization. The Related Records panel lists the business entities that are directly related to the business entity that is open in the Business Entity view.

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

### Scenario for Adding and Editing Related Records

A relationship is configured between the Organization and the Person business entity types, such that an organization employs persons. You have an organization, Informatica, to which you want to add the employees. John Smith is an employee of Informatica.

You search for the record for Informatica. You open the record. You search for the record for John Smith. You add John Smith as a related record to Informatica. After an appraisal, John Smith has a different job title and salary. You must update the relationship details to reflect the change. You open the record for Informatica and select the relationship between Informatica and John Smith. You update the relationship details.

### 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.

3. In the Related Records panel, click New.

The Relationships 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.

The following image shows the search results and the filter panel:

Sea	rch Results (84)			
	Name	Description	Туре	Filters Apply Filter
9	✓ Person: CRUISE, AS	. Rowid Object: 999 , Party Type: Person, Last Nam	e: C Person	Party Type
8	✓ Person: ALVAREZ,	Rowid Object: 1314 , Party Type: Person, Last Nam	ie: A Person	Person (84)
Ð	✓ Person: REYES, ALE	Rowid Object: 1317 , Party Type: Person, Last Nam	ie: R Person	Display Name
9	✓ Person: BENNETT,	Rowid Object: 1329 , Party Type: Person, Last Nar	ne: B Person	AARON BENNETT (1)
3	🛷 Person: JOSHI, ALOK	Rowid Object: 1363 , Party Type: Person, Last Nar	ne: J Person	ACTON MENDEZ (1)
3	✓ Person: HARVEY, A	Rowid Object: 1433 , Party Type: Person, Last Nar	ne: H Person	ADA HARDY (1)
3	✓ Person: LEE, ASHLEY	Rowid Object: 1466 , Party Type: Person, Last Nar	ne: L Person	ADAM BOSH (1)
3	✓ Person: GRAY, ADA	. Rowid Object: 1334 , Party Type: Person, Last Nar	ne: Person	ADAM GRAY (1)
3	✓ Person: ROSENBER	Rowid Object: 1422 , Party Type: Person, Last Nar	ne: R Person	ADOLFO RAMILLO (1)
•	Person: RAMSEY A	Rowid Object: 1429 Party Type: Person Last Nar	ne: R Person 10 V records per p	page ADRIENNE ADKINS (1)
			1 - 10 of 84 i	items AGNES BISHOP (1)

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. The following image shows the filtered records:

Relc	ationships	Select Relationship type	Organizatio 🔻	A*		Search		Go Ba	k Hide Filters
Sear	ch Results (2)								
	Name	Desc	ription			Туре		Filters	Apply Filter
٥	🗸 Person: GRAY	, ADA Rowid	Object: 1334 , Pa	rty Type: Person, Lo	ast Name:	Person		Party Typ	be
0	🗸 Person: HARD	Y, ADA Rowid	Object: 1611 , Par	ty Type: Person, Lo	ist Name: H	Person			on (84)
								Display	Name
									ON BENNETT (1)
								ACT	ON MENDEZ (1)
								ADA	A HARDY (1)
								ADA	AM BOSH (1)
								AD/	AM GRAY (1)
								ADO	DLFO RAMILLO (1)
		4	<u>/</u> 1			10 V record	s per page	AD	RIENNE ADKINS (1)
						1 - 2	2 of 2 items	AG	NES BISHOP (1)
								$\frown$	

- 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.

For example, for a PersonOwnsAutomobile relationship, you might have to specify the mileage and price.

11. Click Apply.

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

The following image shows the related records in the **Related Records** panel:

Organization								View:	New layout	-
Organization	<ul> <li>Overview</li> </ul>						Edit	Related	Records (3)	Now
Addresses	Display Name: /	Media Networks Inc	Party Type:	Organization	DUNS Number:	042530555			n: HARDY, ADA izotion employs Person	<i>.</i> ∕* ⊞
Phones	✓ Addresses (1)						=		n: BISHOP, AGNES Ization employs Person	,#` <b>ū</b>
Details	Address Type							Person	n: MENDEZ, ACTON	
	OrgDataInc								izotion employs Person	Ш
	<ul> <li>Phones (1)</li> </ul>						=			
	Do Not Call Ind	Phone Ext Number	Phone Number	Phone Country Cd	Phone Type					
			6152441803	1	PRIMARY					
	✓ Details (1)						=			
	Employee Count	Close Date	Establish Date							

#### 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.

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

#### Editing the Relationship Details

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**.

For example, assume that job title and salary are two attributes associated with the OrganizationEmploysPerson relationship. After an appraisal, you might edit the job title and salary for that Person record to reflect the changes.

### **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.

Data Director marks the record as deleted and no longer displays the record, but does not remove the record from the database.

## CHAPTER 8

## Importing Bulk Data

This chapter includes the following topics:

- Import Bulk Data Overview, 76
- Import Bulk Records, 77
- Import Bulk Relationships, 77
- Update Records, 78
- Field Mapping, 78
- Preview Records, 80
- Importing Data, 81
- Trigger the New File Import Review Process, 84
- File Import Summary Report, 85
- Match New Records with Existing Records, 86

## 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.

You cannot import files that have special characters in the file name. For example, you cannot import a file with the following name: My:File.csv. The following special characters are not supported in import file names: / \ \* ? % : | " < >

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

ct the file you want to upload	L			
fest CSV File.csv (Change F	ão)			
Name	Last Name	Address	Phone Number	55N
John	Smith	Toronto	666-876-8987	986-898-5632
Sean	Antoine	London	416-252-6765	234-456-5764
Kai	Zhu	Hong Kong	363-876-3874	476-948-4009
James	Anhur	Sydney	986-888-9696	986-898-5632
Kerry	Dalion	New York	586-9856-3758	985-896-5423
The file import settings are	populated based on the file you select to import. If you don't see the desired t			
● The file import settings are Delimiter: •	Comma •	<ul> <li>Regional Settings</li> </ul>		
The file import settings are telimiter: * @ not Qualifier: @		Regional Settings Date Pattern:  M/d/yy		
The file import settings are telimiter: * @ not Qualifier: @	Comma •	Regional Settings           Date Pattern:         M/d/yy           Decimal Separator:         .		
The file import settings are elimiter:	Comma	Regional Settings Date Pattern:  M/d/yy		
Delimiter: * @ fext Qualifier: @ Cade Page: * @ mport Data from line: * @	Conna	Regional Settings           Date Pattern:         M/d/yy           Decimal Separator:         .		

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 81

## 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	d			Source Column	Header		
▼ Person relative SecurePerson							
	Primary Key 🕳						
	Source Key 🕳						
1	From	Entity •	Person	•	٩		
1	То	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 78.

## **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:

* New File Import				Back Next> Import
Upload File     2 Map Fields     3 Preview & Imp Map column headers from the source file to fields in a target busin				
Source (Test CSV File.csv)		Target - Person		0
	Find D Hide Row Preview	System-Applied Field Mappings		0.0
Source Columns	Row 1 of first 5	To view or edit the field mappings, click a busine	iss entity or relationship.	
Name	John		Show All	
Last Name	Smith	E Map Selected		6
Address	Toronto	Target Field	Source Column Header	
Phone Number	666-876-8987	▼ Person		
SSN	986-898-5632	Primary Key 🚥		
2* - 1225		Source Key		
		Party Type		
		🛞 II Last Name 🏲	Last Name	
		🔞 🛙 Display Name 🏲	Last Name	
		Floot_fld		
		Int_fld		
		🔞 II DUNS Number 🏲	Phone Number	
		Generation Suffix Cd		
		Bool_fid		
		Middle Name		

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
<b>()</b>	Indicates a high level of confidence. All source columns are mapped to the business entities. You can manually review and accept the mapping.
<b>0</b> 11	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.
<b>()</b>	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.

Filter Source	Filter Source Rows						
You can filter source rows for the selected target. Drag and drop a Source column filter to filter by							
😭 Address:	Toronto	Apply	×				

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:

Record Preview				John			
Quickly scroll to:	→ Bill address(1)					1	
and the second	Bill dddless(1)						
Overview	Eff Start Date	Eff End Date	Opt In Ind	Preferred Ind	Address Type		Ste
Null Rels					Toronto		
<ul> <li>Bill address</li> </ul>	✓ Org(1)				_		
• Org	Rowid Rel Type	Rowid Hierarchy	Rel Name	Rel Desc			
🗣 Email			John				
Relative	Email(0)						
Names	<ul> <li>Relative(1)</li> </ul>					:=	
Ship addre	Rel Type Code	Rowid Hierarchy					
• Car							
Telephones	Names(0)					=	
Details	<ul> <li>Ship addresses(1)</li> </ul>					:=	
- Dolding	Address Type	Status Cd	Eff Start Date	Eff End Date	Opt In Ind		Pr
	Toronto						

## **Importing Data**

You can import data in bulk into Data Director. 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 files that have special characters in the file name.

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 pattern for dates in the import file. For more information about the supported date patterns, see <u>"Supported Date Patterns" on page 83</u> .
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**.

#### Supported Date Patterns

When you import data, if the date values do not match with the supported date patterns, the import process fails.

The following table lists all the date patterns that the import process supports:

yyyy-MM-dd'T'HH:mm:ss.SSS'Z'	d/M/yy h:mm:ss a	d/M/yyyy H:mm:ss
yyyy/M/d	d/M/yy h:mm:ss a z	d/M/yyyy H:mm:ss z
yyyy/M/d h:mm	d/M/yy h:mm a	d-MMM-yy
yyyy/M/d h:mm:ss	d/M/yy h:mm:ss a	d-MMM-yy h:mm a
yyyy/M/d h:mm a	d/M/yy h:mm:ss a z	d-MMM-yy h:mm:ss a
yyyy/M/d h:mm:ss a	d/M/yyyy	d-MMM-yy h:mm:ss z a
yyyy/M/d H:mm	d/M/yyyy h:mm a	d-MMM-yy
yyyy/M/d H:mm:ss	d/M/yyyy h:mm:ss a	d-MMM-yy HH:mm
d/M/yy	d/M/yyyy h:mm:ss a z	d-MMM-yy HH:mm:ss
d/M/yy h:mm a	d/M/yyyy H:mm	d-MMM-yy HH:mm:ss z
d MMMM, yyyy	d MMMM, yyyy h:mm a	d MMMM, yyyy h:mm:ss a
d MMMM yyyy h:mm a	d MMMM yyyy h:mm:ss a	d MMMM yyyy h:mm:ss a z
d MMM yyyy h:mm:ss a	d MMM yyyy HH:mm	d MMM yyyy HH:mm:ss
d MMMM yyyy h:mm a	d MMMM yyyy h:mm:ss a	d MMMM yyyy HH:mm
M/d/yy	M/d/yy h:mm a	M/d/yy h:mm:ss a
M/d/yyyy h:mm a	M/d/yyyy h:mm:ss a	M/d/yyyy h:mm:ss a z
M d, yy h:mm:ss a z	M d, yy h:mm:ss a	МММ d, уууу
MMM d, yyyy h:mm:ss a z	MMMM d, yyyy	MMMM d, yyyy h:mm a
MMMM d, yyyy h:mm:ss a z	dd-MM-yyyy h:mm:ss z a	dd-MM-yyyy
dd-MM-yyyy h:mm:ss a	dd-MM-yyyy HH:mm:ss	dd-MM-yyyy HH:mm:ss z
d MMM, yyyy h:mm a	d MMM, yyyy h:mm:ss a	d MMM, yyyy h:mm:ss a z

d MMMM yyyy	d MMMM yyyy HH:mm:ss z	M/d/yyyy
MMM d, yyyy h:mm:ss a	MMMM d, yyyy h:mm:ss z a	d-MMM-yyyy h:mm:ss a
d-MMM-yyyy	d-MMM-yyyy h:mm a	d-MMM-yyyy h:mm:ss z a
d-MMM-yyyy h:mm:ss z a	d-MMM-yyyy	d-MMM-yyyy HH:mm
d-MMM-yyyy HH:mm:ss	d-MMM-yyyy HH:mm:ss z	dd-MM-yyyy
dd-MM-yyyy h:mm a	d MMMM, yyyy h:mm:ss a z	d MMM yyyy
d MMM yyyy HH:mm:ss z	d MMMM yyyy HH:mm:ss	M/d/yy h:mm:ss a z
M d, yy	MMM d, yyyy h:mm a	MMMM d, yyyy h:mm:ss
dd-MM-yyyy HH:mm	d MMM, уууу	d ММММ уууу
M d, yy h:mm a		

## 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 Data Director, 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:

My Jobs		1			
Match Results(1) Bulk Upda	ates(50) File Imports(157)				
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	IIA troomi	✓ Success	Imported: 1
▶ test1.csv	2020-01-15 21:08:20	2020-01-15 21:09:03	IIA noqui	🔥 Warning	Imported: 1   failed to import: 4
▶ test1.csv	2020-01-15 21:03:30	2020-01-15 21:04:18	IIA troom	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:

Match Results(0) Bulk Updat	es(32) File Imports(78)								
File Name	Start Date	End Date	Job Type	Status	Results				
▼ test1.csv	2020-03-12 20:18:35	2020-03-12 20:18:51	Inport All	✓ Success	Imported: 5				
						Total	Persisted	Load Errors	Parsing Err
					Automobile	1	1	0	0
					Organization	ï	1	0	0
					Organization emp	ï	1	0	0
					Person New label	i.	1	0	0
					PersonToAutomobi	i i	ĩ	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 in into Data Director 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 pattern for dates in the import file. For more information about the supported date patterns, see <u>"Supported Date Patterns" on page 83</u> .
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.
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, Data Director 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:

match results. Download matches or imp	John Helonda.						
Match Reselts   Demo.dsx					Download and	mport Options	
					D	wnload Matched Records (7)	
			<b>—</b> M	atched:7 (50%)		Import Matched(7)	
	7	la l	Ur	ique:7 (50%)		Import Unmatched (7)	
			Sk	ipped:0 (0%)		Import All (14)	
Matching Records (7) Unique Rr							
		Last Name	Display Namo	float, fid	in_fid	DUNS Number	Generation Suffix C
Confidence Level (%)	scords (7) All (14)		Dişələy Namo	floor_Bd	ia_fid	DUNS Number	Generation Suffix C
Confidence Level (%)	scords (7) All (14)	Last Norme	Display Nama MIA TT ZHOU	floor_Bd 11.2	int_Bd 1234	DUNS Nember	Generation Suffix C
Confidence Level (%)	eccords (7) All (14) Party Type	Last Name Zhou				DUNS Number	
Confidence Level (%)	eccords (7) All (14) Party Type	Last Name Zhou ZHOU				DUNS Number	
Matching Records (7) Unique Re Confidence Level (%) 100 – –	scords (7) All (14) Party Type Person	Las None Zhov ZHOU XHOU XHOO	MIA IT ZHOU	11.2	1234	DUNS Number	X

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 9

# **Resolving Duplicate Records**

This chapter includes the following topics:

- Resolving Duplicate Records Overview, 89
- Scenario for Duplicate Records, 93
- <u>Resolving Duplicate Records</u>, 93
- Resolving Duplicate Child Records in a Single Record, 97

## **Resolving Duplicate Records Overview**

Your organization might have data that originates in multiple systems, resulting in duplicate, hard to merge records. To resolve the duplicate records, you can use the **Matching Records** view in Data Director. You can identify the duplicates, and merge the best version of the data into a single master record.

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

When you merge duplicate records, you can preview what the merged record would look like. If you are satisfied with the preview, you can merge the records.

You must have the required privileges to view and merge the records. You can see only the business entities for which you have the required privileges. To request additional role privileges, contact your MDM administrator.

#### Matching Records View

You can resolve duplicate records by using the basic **Matching Records** view or the advanced **Matching Records** view. Your application might have one or both the **Matching Records** views configured.

#### **Basic Matching Records View**

You can use the basic Matching Records view to merge only the duplicate parent records.

Matching Records (0)					Preview	Merge	Add Candidate View 👻	1	
	1018244		1038244	i	1038245	1	Merge Preview		
Record Type	Target Record		Matched: IDL 12	[83]	Manually Ad	ded	1 Candidates		
First Name	JOHN	89.74	JANE	89.78	JON	89.78	JOHN		
Last Name	SMITH	89.74	SMITH	89.78	SMITH	89.78	SMITH		
Birthdate	1975-06-10 00:00:00		1979-01-23 00:00:00		1975-06-10 00:00:00		1975-06-10 00:00:00		
Gender Code	MALE	89.74	FEMALE	89.78	MALE	89.78	MALE		
➡ Bill address	1/2 ►		1/1		1/1		1/3 🕨		
Address Line1	1 KING STREET		1 KING STREET		125 QUEEN STREET		1 KING STREET		
City Name	TORONTO		TORONTO		TORONTO		TORONTO		
Postal Cd	M5J 1 P9		M5J 1 P9		M5A 1C7		M.5J 1 P9		
State Cd	ONTARIO		ONTARIO		ONTARIO		ONTARIO		
Country Code	Canada		Canada		Canada		Canada		
	1/2 🕨		1/1		1/1		<1/3 ▶		
Phone Number	800-555-0147	0	800-555-0183	0	800-555-0147	0	800-555-0147		
	E 1/1 E		1/1		1/1		1/2 ►		
Electronic Address	smith@gmail.com		jane@gmail.com		smith@gmail.com		smith@gmail.com		

The following image shows a sample basic Matching Records view:

#### Advanced Matching Records View

You can use the advanced Matching Records view to merge the duplicate parent and child records.

The following image shows a sample advanced **Matching Records** view that is displaying the parent-level records:

Smith,John					View:	Matching Records (Adva	inced)	•
Matching Records					Merge	Preview	Add Candidate Show 👻	
de Novigote <b>Y Filter</b>	Record ID Match Rule (Score) Last Updated On Record State	Morge Pravlew	SMITHJOHN 1018244 N/A 2018-08-21 14:52:46 Active		SMITHJON 1038245 N/A 2018-08-21 15:11:00 Active		i ■ SMITHJANE 1038244 IQJ 12 (83) 2018-08-21 14:52:46 Active	
	First Name:	JOHN	JOHN	89.96	JON	90	JANE	
	Last Name:	SMITH	SMITH	89.96	SMITH	90	SMITH	
Overview	Birthdate:	1975-06-10 00:00:00	1975-06-10 00:00:00		1975-06-10 00:00:00		1979-01-23 00:00:00	
<ul> <li>Bill address</li> <li>Telephones</li> </ul>	Gender Code:	MALE	MALE	89.96	MALE	90	FEMALE	
Telephones Telephones Telephones Telephones								

The following image shows a sample advanced **Matching Records** view that is displaying the child-level records:

SMITH,JOHN				View:	Matching Records (Adva	inced]	•
Telephones				Merge	Proview	Add Candidate	Show 👻
de Novigeto T Fiber	Marge Preview Parent Record ID Lat Updated On Record State	Telephones SMITHJOHN 120962 2018-08-20 10:31:50 Active		Telephones SMITHUOHN 120963 2018-08-20 16:37:47 Active		Telephones SMITHJON 140963 2018-08-21 14:41:54 Active	
	Phone Number: 800-555-0147	800-555-0147	0	800-555-0147	0	800-555-0147	0
Overview  Im Bil dofees  Talophones  Bil Helphones							
B Telephones							

#### Matching Records and Match Rules

Data Director depends on match rules to determine the matching records. An MDM administrator configures match rules based on the data characteristics and the requirements for matching and merging records.

The match rules determine whether the matching records have identical values or similar values. Also, match rules determine the records that are automatically merged and the records that appear on the **Matching Records** view.

For example, consider a match rule that is based on addresses. Based on the match rule, John Smith and Jane Smith are identified as matching records, because they share the same address. Though their address is the same, they are unique people. Their records are not duplicates and must not be merged.

The records that appear on the **Matching Records** view have a match score associated with them. The match scores are based on the match rules. A high match score indicates that the record is a close match. A low match score indicates that the record is a distant match.

**Note:** When a match job runs, the matching records are identified. If a match job was not run recently, the **Matching Records** view might not contain all the possible matches. If you upgrade from an earlier version, the match scores are set to null for the existing matching records. The match scores are displayed only for the new matches.

For more information about match rules, see the Multidomain MDM Configuration Guide.

#### Best Version Of the Truth and Trust Scores

Best version of the truth is the result of merging the most trustworthy field values from the duplicate records. Data Director uses trust scores to evaluate and determine the most trustworthy field values. When you prepare to merge duplicate records, you can finalize the best version of the truth.

You can finalize the best version of the truth by promoting or overriding the values in the **Merge Preview** column with values that you think are correct. For the values that you override to take effect, the MDM administrator must have configured trust for the Admin system. When you merge records, if child-level records with values that you override are also being merged, an additional cross-reference record, which is called an edit record might be created or updated. An edit record is created or updated when you override values in the **Merge Preview** column. The edit record contains only the field values that you override.

To identify an edit record, look for the following field values:

- Source system. The value is Admin.
- Source primary key. The value is generated by the MDM Hub and is the same as the Record ID or has the format SYS:<number>.

If trust is configured for your environment, the records that appear on the **Matching Records** view have trust scores associated with the fields for which trust is enabled. Trust scores are a measure of the relative trustworthiness associated with field values based on their source system, change history, and other business rules. Trust scores range from zero to 100. A field value with a higher trust score is more trustworthy than a field value with a lower trust score.

For more information about the best version of the truth and trust scores, see the *Multidomain MDM Configuration Guide*.

#### Merging Duplicate Records

To resolve duplicates, you merge the records that you identify as duplicates. When you merge duplicate records, a single master record is created.

The records that you want to merge consist of a parent record level and might consist of multiple child record levels. The child records can have a one-to-one or a one-to-many relationship with the parent record. For example, John Smith's record consists of name, date of birth, and gender details at the parent record level. The child record level includes addresses, email, and phone numbers.

**Note:** IDD application developers define the parent-to-child relationships when they define the structure of a business entity.

When you merge records, the duplicate parent records merge into a single parent record. If the records to merge have child records, you need to identify your scenario and act accordingly.

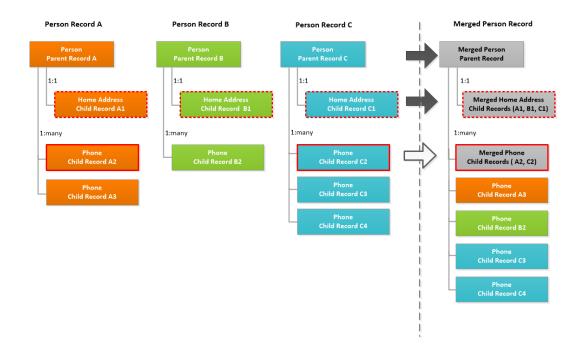
The following table describes the child record scenarios, the related actions, and the results of each action:

Child Record Scenario	Action	Result
Duplicate child records with one-to-one relationship	Automatic merge.	The one-to-one child records from each parent record automatically become the child record of the merged parent record.
Some duplicate child records with one-to-many relationship	Select duplicate child records to merge.	The duplicate child records merge to become the child record of the merged parent record. The child records that are not selected become the child records of the merged parent record.
Unique child records with one-to-many relationship	Automatic inheritance.	The child records from each of the parent records become the child records of the merged parent record.

#### Example

Let's consider merging three duplicate records, where each record has a parent-level with name, date of birth, and gender details. The child record level includes the home address and phone numbers.

The following image shows how the three person records are merged:



## Scenario for Duplicate Records

You work for an insurance organization. A customer, Paula Laine, calls to review her home insurance policy. You ask Ms. Laine for her policy number, and enter the policy number in the **Search** box.

In the search results, you select the record that contains the policy number, and open the record in the **Business Entity** view. You confirm a few personal details and then answer Ms. Laine's questions about her policy.

After you answer her questions, you ask Ms. Laine if she has any other policies. Ms. Laine tells you that she has an automobile policy registered with a subsidiary of your organization. You enter the automobile policy number in the **Search** box, and the search returns the record that contains the automobile policy. You verify that the personal data matches the data in the other record.

After you end the conversation, you open the record that contains the home policy in the **Matching Records** view. From the similar records, you select the entity that contains the automobile policy. You click **Preview** and verify that both policies appear in the Policies section. In addition, you can see that the merged record is more complete overall, with data such as Ms. Laine's middle name and her mobile phone number coming from different source records. When you are satisfied that the merge preview represents the best version of the truth, you start the merge process.

## **Resolving Duplicate Records**

Use the **Matching Records** view to identify duplicate records. You can resolve the duplicate records by merging them. To merge records, your user role must include the merge permission.

You can resolve the duplicate records by using the basic **Matching Records** view or the advanced **Matching Records** view. Use the basic **Matching Records** view when you want to merge only the duplicate parent records. To merge the duplicate parent and child records, use the advanced **Matching Records** view. Your application might have one or both the **Matching Records** views configured.

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

#### By Using the Basic Matching Records View

To resolve duplicate records using the basic Matching Records view, perform the following tasks:

- 1. Identify duplicate parent records.
- 2. Finalize the best version of the truth for parent records.
- 3. If child records exist, identify duplicate child records.
- 4. Finalize the best version of the truth for child records.
- 5. Merge duplicate records.

#### By Using the Advanced Matching Records View

To resolve duplicate records using the advanced Matching Records view, perform the following tasks:

- 1. Identify duplicate parent records.
- 2. Finalize the best version of the truth for parent records.
- 3. Merge duplicate records.

#### Identifying Duplicate Parent Records

To identify duplicate records, open the target record in the **Matching Records** view. The target record appears along with the matching records in the **Matching Records** view. Start by identifying duplicates at the parent record level.

1. Open the target record, and then select the Matching Records tab.

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

The matching records appear in the Matching Records view.

- For the advanced Matching Records view only. Optionally, view only the records that satisfy a specific match rule.
  - a. Click the Filter tab.
  - b. Select Specify a match rule.
  - c. Click in the field and select the match rule from the list.
- 3. If duplicate records that you want to merge with the target record are missing in the **Matching Records** view, manually add the records.

If you use queries to find records that you want to add, the queries must be created before you perform this step.

a. Click Add Candidate.

The search user interface appears.

- b. Find and select the records that you want to add.
- c. Click Select.

The records are added to the Matching Records view.

4. Optionally, to show more information that might be helpful in determining duplicates, click **Show**, and select the options.

Option	Description
System fields	Displays system fields. This option is not available in the basic <b>Matching Records</b> view.
Selected records	Displays only the records that you select for merging. This option is not available in the basic <b>Matching Records</b> view.
Trust scores	Displays trust scores for all the trust-enabled fields. Trust settings are managed by the MDM administrator.

- 5. Identify the duplicate records that you want to merge with the target record.
  - a. Compare the data of each matching record with the target record.
  - b. Select the duplicate records.

**Note:** You cannot select records if your user role does not include permission to merge the records. To request changes to your role privileges, contact your MDM administrator.

The Merge Preview column shows the result of merging the records.

- 6. Optionally, remove records that you do not want to merge or are not duplicates.
  - a. To remove a manually added record from the **Matching Records** view, from the **Actions** menu of the record, click **Remove Candidate**.
  - b. To remove a system matched record from the **Matching Records** view and dissociate it as a match of the target record, from the **Actions** menu of the record, click **Not a match**.

When you dissociate a matching record, the record does not automatically match again.

#### Finalizing the Best Version Of the Truth

After you identify the duplicate records that you want to merge, finalize the best version of the truth. The **Merge Preview** column in the **Matching Records** view displays the best version of the truth based on the trust scores. You can finalize the best version of the truth by promoting or overriding the values in the **Merge Preview** column with values that you think are correct.

- 1. Review the values in the Merge Preview column.
- 2. If an incorrect value is displayed in the **Merge Preview** column, review the values for the field in the matching records, and perform one of the following actions:

Action	Description
Click the correct value	The correct value appears in the <b>Merge Preview</b> column. Data Director promotes the correct value over the incorrect value.
Enter the correct value in the <b>Merge Preview</b> column	Data Director overrides the incorrect value with the value that you enter in the <b>Merge Preview</b> column. <b>Note:</b> You can only edit fields for which you have edit privileges.

#### Identifying Duplicate Child Records

If you use the advanced **Matching Records** view, you can identify the duplicate child records by reviewing the child records and their descendant records in the **Matching Records** view. Select a target child record with

which you compare the child records of other parent records. Select the duplicate child records that you want to merge.

**Note:** As you work with the child records, you might find data that makes you decide that a parent record is not a duplicate. You can return to the record overview and clear the check box for that parent record. The data in the **Merge Preview** column is refreshed.

1. In the Navigate panel, expand a node and select a child record as the target record.

The target child record appears next to the Merge Preview column. The remaining child records appear in the other columns.

Tip: If the record shows a pending status, the record cannot be merged with other records.

2. Select the duplicate child records that you want to merge with the target child record.

Tip: If the record shows a pending status, you cannot select the record to merge with other records.

The **Merge Preview** column shows the result of merging the target child record with the duplicate child records.

3. If the target child record can be further expanded, then expand the record and select the node that is exposed.

All the fields of the child records are displayed.

- 4. Repeat the process on the remaining child records. Optionally, you can perform the same process on descendant records.
- 5. Click Merge.
- 6. In the Merge Duplicates dialog box, confirm the merge.

A manual merge request is saved in an internal change list.

#### Merging Duplicate Records

After you identify the duplicate records and finalize the best version of the truth, you can merge the duplicate records.

- 1. Optionally, preview the result of merging the records.
  - a. Click Preview.

The Record Preview appears.

- b. Review the record.
- c. To return to the Matching Records view, click Back.
- 2. Merge the duplicate records manually or queue the duplicate records for an Automerge job.
  - To manually merge the duplicate records, click Merge.

Based on your user role privileges, one of the following actions occur:

User Role Privilege	Result
Requires a review process to merge records	The duplicate records that you selected go through the merge review workflow. The records remain in the active state, but the records are merged only after the merge proposal is approved.
Does not require a review process to merge records	The duplicate records that you selected are merged into a single record and remain in the active state.

• To automatically merge the duplicate records, click the **Actions** menu, and then click **Queue for Merge**.

The records are queued for merge, and the records merge when the Automerge job runs. The Automerge job is run by the MDM administrator.

**Note:** If your user role does not have the privileges to merge records, the **Queue for Merge** menu item is not available.

#### **RELATED TOPICS:**

- "Establish the Best Version of the Truth" on page 100
- <u>"Identifying Duplicate Parent Records" on page 94</u>

## Resolving Duplicate Child Records in a Single Record

To resolve duplicate child records within a single record, open the record in the **Matching Records** view. Do not select any other records.

1. Open the record that has duplicate child records, and then select the Matching Records tab.

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

The record appears in the Matching Records view.

2. In the Navigate panel, expand a node and select a child record as the target record.

The target child record appears next to the **Merge Preview** column. The remaining child records appear in the other columns.

3. Select the duplicate child records that you want to merge with the target child record.

The **Merge Preview** column shows the result of merging the target child record with the duplicate child records. The most trustworthy field values are highlighted. The highlighted values appear in the Merge Preview column.

- 4. Review the values in the Merge Preview column.
- 5. If an incorrect value is displayed in the **Merge Preview** column, review the values for the field in the matching records, and perform one of the following actions:

Action	Description
Click the correct value	The correct value appears in the <b>Merge Preview</b> column. Data Director promotes the correct value over the incorrect value.
Enter the correct value in the <b>Merge Preview</b> column	Data Director overrides the incorrect value with the value that you enter in the <b>Merge Preview</b> column. <b>Note:</b> You can only edit fields for which you have edit privileges.

- 6. Repeat the process on the remaining child records. Optionally, you can perform the same process on descendant records.
- 7. Merge the duplicate records manually or queue the duplicate records for an Automerge job.
  - To manually merge the duplicate records, click **Merge**.

Based on your user role privileges, one of the following actions occur:

User Role Type	Outcome
Requires a review process to merge records	The duplicate records that you selected go through the merge review workflow. The records remain in the active state, but the records are merged only after the merge proposal is approved.
Does not require a review process to merge records	The duplicate records that you selected are merged into a single record and remain in the active state.

• To automatically merge the duplicate child records, click the **Actions** menu, and then click **Queue for Merge**.

The child records are queued for merge, and the records merge when the Automerge job runs. The Automerge job is run by the MDM administrator.

**Note:** If your user role does not have the privileges to merge records, the **Queue for Merge** menu item is not available.

## CHAPTER 10

# Establishing the Best Version of the Truth

This chapter includes the following topics:

- Master Records and the Best Version of the Truth, 99
- Scenario, 100
- Establish the Best Version of the Truth, 100
- Understand Manual Updates to a Master Record, 101
- Unmerge Cross-reference Records, 102

## Master Records and the Best Version of the Truth

Master records in the MDM Hub maintain the best version of the truth. The MDM Hub consolidates the most trustworthy data from several source systems into each master record to achieve the best version of the truth.

The MDM Hub stores source data in cross-reference records. In the **Cross-reference Records** view, a data steward can examine these cross-reference records and investigate which source data contributes to the master record. Data stewards can then make adjustments to how source data is consolidated to ensure that the master record represents the best version of the truth.

The MDM Hub calculates a trust score for the fields in the cross-reference records. The trust calculation is based on settings and rules that are establish by an administrator. For more information about configuring the rules that govern trust score calculations, see the *Multidomain MDM Configuration Guide*.

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

## Scenario

A data steward investigates why customer data in a master record does not represent the best version of the truth.

The phone number for a customer has recently changed to 555-5555. None of the cross-reference records contain this phone number, so the data steward selects the phone number field in the master record and enters the correct phone number.

A master record for a customer record shows the middle name of a customer as 'Stacy'. In fact, the correct spelling of the middle name is 'Stacey'. The data steward sees that a cross-reference record contains the correct spelling but does not contribute to the master record. The data steward selects the field with the correct spelling as the contributor to the master record.

The master record that represents Joe Smith actually contains two cross-reference records that represent customers who are not Joe Smith. The data steward unmerges these two mismatched cross-reference records from the master record representing Joe Smith. Master records are created from the unmerged cross-reference records.

## Establish the Best Version of the Truth

Data stewards can use the **Cross-reference Records** view to examine the composition of the master record. Data stewards can then make adjustments to ensure the master record genuinely represents the best version of the truth.

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

If the most trusted fields do not contain the best data, a data steward can perform the following actions to establish the best version of the truth:

Action	Description	How-to
Enter the correct value	If the correct value does not exist in any cross- reference record, a data steward can enter the correct value in the master record.	Click the incorrect value in the Master Record column, and then enter the correct value. Press Enter, and then click Save.
Select the correct contributing field	If the field with the highest trust score does not contain the best version of the truth, a data steward can select the field that does contain the correct data to contribute the data to the master record.	Click the field that contains the correct data. Click Save
Remove mismatched source data	If a cross-reference record should not be associated with a particular master record, a data steward can unmerge the cross-reference record. A new master record is created from the unmerged cross-reference	Select the checkbox for the cross- reference records that contain the mismatched data, and then click <b>Unmerge</b> .
	record.	For more information about unmerging, see <u>"Unmerge Cross-</u> <u>reference Records" on page 102</u> .

	1	2		3 Save	Cancel	Unmerge Option	s <del>v</del>
Source primary key Last updated on Record state	Master Record	SFA 35174034284 2008-08-12 02:15:02 Active		Admin 329 2016-08-29 06:34:37 Active			
Party Type:	Person	Person		Person			
Last Name:	JOSHI	JOSHI	32	JOSHI	88.56		
Display Name:	ALOK JOSHI	ALOK JOSHI	40	ALOK E JOSHI	88.56		
Middle Name:	Emil		0	E	88.56		
Birthdate:	2016-08-05 16:33:35		0	2016-08-05 16:33:35	88.56		
First Name:	ALOK	ALOK	32	ALOK	88.56		

The following image shows the ways in which data stewards can establish the best version of the truth:

1. Enter the correct value

2. Select the correct contributing field

3. Select a cross-reference record to unmerge

## **Understand Manual Updates to a Master Record**

In the **Cross-reference Records** view, the highlighted cells indicate the values with the highest trust score. You can manually update a value, regardless of the trust score for the field. When you manually update a value in the master record, the Master Record column shows the changed value. The cell highlight continues to identify the value with the highest trust score.

For example, consider a gender code field with the possible values: UNKNOWN, MALE, and FEMALE. In the following image, the gender code in the Master Record column is UNKNOWN, but the most trusted value is MALE:

Source primary key Last updated on Record state	Master Record	5FA 42000005000 2018-08-31121:45:51.811+05:30 Active		SFA 420000066000 2018-08-31721:46:06.765+05:30 Active		Admin SY5:401926 2018-08-31T21:46:06.909+05:30 Active		
Party Type:	Person	Person		Person				
Last Name:	cvstwoui		0	cvstwo	80	cvstwoui	45	
Display Name:	harionecvstwoui	harione	80	haritwocvstwo	80	harionecvstwoui	90	
Middle Name:	babutwoyu	babuone	80	babutwo	80	babutwoyu	45	
Birthdate:	2018-02-19 21:03:43	2018-08-21 21:03:43		2018-08-28 21:02:31		2018-02-19 21:03:43	90	
First Name:	haritwo	harione	80	haritwo	100		0	
Gender Cd:	UNKNOWN	MALE	80	MALE	80	UNKNOWN	45	

1. The value in the master record is UNKNOWN.

2. The most trusted value (80%) is MALE.

The value in the Master Record column is the updated value of UNKNOWN. In the Admin column, the value UNKNOWN has a trust score of 45, because a validation rule downgrades the trust score whenever the value of the Gender Cd field is UNKNOWN.

**Tip:** Another way to update a value in the master record is to call the Put API with the TrustOverrideField parameter. After the update, the Put process recalculates the best version of the truth for all fields except the field with the trust override.

## Unmerge Cross-reference Records

If a cross-reference record should not be associated with a particular master record, a data steward can unmerge the cross-reference record. A new master records is created from the unmerged cross-reference record.

The following illustration shows the unmerge behaviour when a cross-reference record is unmerged from a master record that is comprised of five cross-reference records:



## CHAPTER 11

# **Investigating Data Changes**

This chapter includes the following topics:

- Investigating Data Changes Overview, 103
- Investigating Data Changes Scenario, 103
- Investigating Data Changes in a Record, 104

### **Investigating Data Changes Overview**

You can compare the best version of the truth at different moments in time for a particular record or a record version. If you suspect that the data in the record or record version has changed inappropriately, you can use the **History** view to identify the data event that caused the data change.

The **History** view displays a chronology of data changes over the lifespan of the record or a record version. You can view the data that existed in the record or 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, such as an edit or a merge operation.

### **Investigating Data Changes Scenario**

A customer reports that he recently changed his email address and he wants to confirm that you have his current contact details. You look in the **History** view for the record that represents this customer.

The customer stated that he changed his address in October of the current year, so you look for data events in the **History** view chronology that occurred around that time. You see that multiple data events occurred in October for the record that represents the customer. You navigate to the Email child record and compare the data before and after the data events. You see that the new email address for the customer was added. After further investigation, you see that the middle name of the customer was added.

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

## Investigating Data Changes in a Record

Use the History view to investigate data changes in a record.

1. With the record open, select the **History** tab.

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

The **History** view opens. Changes to the record appear on the timeline.

- 2. Optionally, select filters to show or hide different types of events.
- 3. Optionally, select a time unit to group data events. To do this, click **Options** and choose a different timescale. For example, select **M** to select a monthly timescale.

The following image shows data events grouped under the month of October:

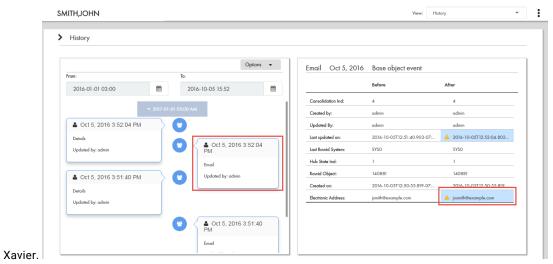
History						
		Options	•	Email Oct 5, 2016	Base object event	
From: 2016-01-01 03:00	Te	2016-10-05 15:52	*		Before	After
			<u> </u>	Consolidation Ind:	4	4
	▼ 2017-01-01 03:	00 AM	- 11	Created by:	admin	admin
& Oct 5, 2016 3:52:04 PM				Updated By:	admin	admin
Details				Last updated on:	2016-10-05T12:51:40.903-07:	A 2016-10-05T12:52:04.802
Updated by: admin		Oct 5, 2016 3:52:04		Last Rowid System:	SYSO	SYSO
		Email		Hub State Ind:	1	1
& Oct 5, 2016 3:51:40 PM		Updated by: admin		Rowid Object:	140881	140881
				Created on:	2016-10-05T12:50:55.819-07:	2016-10-05T12-50-55.819
Details Updated by: admin				Electronic Address:	jsmith@example.com	▲ jxsmith@example.com
opanie of anim						
		Cct 5, 2016 3:51:40				

4. Click the event labeled Email.

The event details panel shows the record details before and after the event and the time when the record was updated. In this example, the email address has changed from jsmith@example.com to jxsmith88@example.com.

#### 5. Click the event labeled SMITH, JOHN.

The following image shows that the display name of the record changed from John Smith to John



## CHAPTER 12

# **Investigating Relationships**

This chapter includes the following topics:

- Investigating Relationships Overview, 106
- User Interfaces, 106
- Managing Hierarchy Relationships, 109
- Managing Network Relationships, 114

## **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:

usiness Entity Matching Records Cross-reference Records History	Hierarchy Network			
lierarchy				Submit Discord
ODI: Time Warner Inc			Time Warner Inc	C1 E
factive Date: July 21, 2021	Find	Q 8 🖻 🖘 🖻	Related Quick Vew	
			Parent Relationships (0)	5
<ul> <li>Ime Wamer Inc</li> </ul>			Business Entity Record Relationship	
Historic TW Inc				
CNN Sports Illustrated				
<ul> <li>HBO Homeowners Inc</li> </ul>				
BO Haneowners Inc     B Hatoric TW Inc				
-				
B Hateric TW Inc     B Hateric TW Inc		:	Olid Relationships [14]	÷ 2
G Hanne TW Inc     G Hanne TW Inc     G Hanne TW Inc     G Hanne TW Inc		:	Business Entry Record Relationship	\$ ?
(i) Hander TW Hz:      (ii) Hander TW Hz:      (iii) Hander TW Hz:      (iiii) Hander TW Hz:      (iii) Hander TW Hz:      (iiiii) Hander TW Hz:      (iii) Hander TW Hz:      (iii) Hander TW		:		4.2
Stance, TV Inc.		÷	Business Entry Record Relationship	4.2
(i) Hander TW Hz:      (ii) Hander TW Hz:      (iii) Hander TW Hz:      (iiii) Hander TW Hz:      (iii) Hander TW Hz:      (iiiii) Hander TW Hz:      (iii) Hander TW Hz:      (iii) Hander TW		:	Beatness Entity Record Relationship     Aol Time Warner Global Marketing Sclutz is OOI parent of	÷ ?
Stance, TV Inc.			Bearses Entry Record         Relationship           Act Time Warner Global Marketing Soluti is COII power of         Act Time Warner Interactive Video Group is COII power of	÷ ?
		:	burteen Bely Record Relationship     Aul Tean Warner Geldel Markeing Soles is COI power of     Aul Tean Warner Teanscriev Velos Group is COI power of     Aul Tean Warner Teanscriev Velos Group is COI power of     Aul, LLC is COI power of	÷ ĉ

#### 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.

The following image shows a sample Network view for a record:

Ilistoric TW Inc a constant and			
Business Entity Matching Records Cross-reference Records History Hierarchy Network			
Network		Submit Discord	
Effective Date: May 22, 2021 🔳 🗵 Layout: Network: Style 🔹 Ing 🗘 🔍 🔍 I 🕂 🗎 🗠 🄗 🖓 I 🗗	<ul> <li>WF Cinema Holdings LP</li> </ul>	+I⊽IĽ⊖	
	Active (2) Inactive (0) Quick Vi	aw	
	Business Entity Record	Relationship	
Historie TW Inc	Historic TW Inc	Organization is ODI parent of Organization	
Hasore TW pe	Historic TW Inc	is ODI parent of	
There is the second of the sec			
	1 – 2 of 2  < < Page	1 of 1 > > Items Per Page: 20 ~	
		· · · · · · · · · · · · · · · · · · ·	

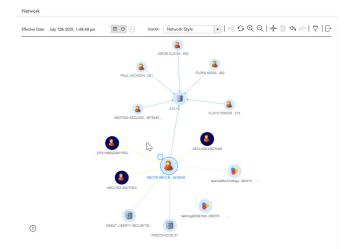
- 1. Network panel
- 2. Relationship panel

#### **Network Panel**

The network panel contains the canvas that shows the network of relationships for the open record. You can expand, collapse, and rearrange nodes on the canvas. You can also add relationships and records to the network.

You can visualize the relationships as a connected graph or a tree graph.

The network layout visualizes relationships in a connected graph. The following image shows the relationships as a connected graph in the network layout:



The hierarchy layout visualizes relationships in a tree graph. The following image shows the relationships as a tree graph in the hierarchy layout:



#### **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.

- 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.
- 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 Hierarchical Relationship

To add a hierarchical 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 hierarchical 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 <u>"Submitting Hierarchy Changes" on page 112</u>.

#### **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 111.

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 <u>"Submitting Hierarchy Changes" on page 112</u>.

### 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.
- 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.
- 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.
Expand	led	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.

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.
- 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.

- 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.
- 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.

- In the Network view, select a node in the canvas.
- 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.
- 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.
- 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.
- Hover over one of the selected records, click the More Actions icon, and then select Delete.
- 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 13

# Investigating Data Change Events for Effective Periods

This chapter includes the following topics:

- Investigating Data Change Events for Effective Periods Overview, 119
- Investigating Data Change Events Scenario, 119
- Viewing Data Change Events, 120
- Adding Data Change Events, 121
- Removing Data Change Events, 122

# Investigating Data Change Events for Effective Periods Overview

A data change event is a change to data such as marital status, address, and phone number that is effective for a time period. Records can have multiple data change events. Use the **Timeline** view to investigate data change events of records.

The changes to data result in new effective periods or updates to an existing or a future effective period. You can use the **Timeline** view to view changes to data over a period of time. Also, you can add and remove data change events to and from the timeline. To manage the data change events, use the **Business Entity** view or the **Data** view.

**Note:** The **Timeline** view is available only to customers who upgraded from the subject area model to the business entity model. If timeline is enabled for base objects in the MDM Hub Store, the **Timeline** view is available for business entities that belong to the base objects.

### Investigating Data Change Events Scenario

Your organization wants to renew and also offer a new insurance package to Alex Sam. To offer a suitable package, you need to investigate the data change events for the record for Alex Sam.

You open the record for Alex Sam in the Timeline view. You specify a specific point in time for which you want to view the data change events for Alex Sam. The data change events that occurred up to the date you specify appear in the Timeline view. You select data change events and view the details. You find that in the

past, Alex Sam was single and went by the name Alex Johns. You now have the information that will help you offer a suitable insurance package that will benefit Alex and the organization.

## Viewing Data Change Events

You can view the data change events for a record in the Timeline view.

1. From the Data view, click Effective Periods.

The record opens in the **Timeline** view. The data change events of the record that occur up to the current date appear in the view.

2. Optionally, to identify the data change events that occurred up to a specific point in time other than the current date, use the calendar to select a date range using the **From:** and **To:** fields.

The data change events that occur up to the specified point in time for the record appear in descending order.

The following image shows the data change events that occurred from July 01, 2019 up to January 03, 2020 for the record, Adam, Mary:

Tom:         Tom: <th< th=""><th></th><th>Options •</th><th>ADAM, MARY 2020.1</th><th>Open for Effective Date</th></th<>		Options •	ADAM, MARY 2020.1	Open for Effective Date
* 2020-01-03         Person           *         Sear Date: 2020-01-03           End Date: 2020-01-03         End Date: 2020-01-03           *         Diploy Name:           MARY ADAM           Four, Bd:         2020.1           Sear Date: 2020-01-02         End Date: 2020-01-02           End Date: 2020-01-02         End Date: 2020-01-02			Effective Date: 2020-01-03	
Image: Sear Date: 2020-01-03         Image: Sear Date: 2020-01-03           Image: Sear Date: 2020-01-03         Image: Sear Date: 2020-01-03           Image: Sear Date: 2020-01-03         Image: Sear Date: 2020-01-03           Image: Sear Date: 2020-01-02         Image: Sear Date: 2020-01-02           Image: Sear Date: 2020-01-02         Image: Sear Date: 2020-01-02		2020-01-03 15:	Party Type:	Person
Stein Date: 2020-01-03         Find_Bd:         2020-11-03           Stein Date: 2020-01-03         Find_Bd:         2020-11           Stein Date: 2020-01-02         End Date: 2020-01-02         End Date: 2020-01-02           Stein Date: 2020-01-02         End Date: 2020-01-02         End Date: 2020-01-02	- 2020-01-03		Last Name:	ADAM
End Date: 2020-01-03         Ing, Bd:           Img, Bd:         DUNS Number:           Generation Suffix Cd:         Generation Suffix Cd:           Bool_Bd:         Double: 2020-01-02	0		Display Name:	MARY ADAM
Image: Serie Date: 2020-01-02         Image: Serie Date: 2020-01-02           End Date: 2020-01-02         Image: Serie Date: 2020-01-02	Start Date: 202	D-01-03	Float_fld:	2020.1
Generation Suffix Cd:           Start Date: 2020-01-02           End Date: 2020-01-02	End Date: 2020	-01-03	Int_Ad:	
Start Date: 2020-01-02         Generation Suffix Cd:           Bool_Bd:         Bool_Bd:	0		DUNS Number:	
End Dok: 2020-01-02			Generation Suffix Cd:	
			Bool_fid:	
	0 (+			
Stort Date: 2020-01-01 End Date: 2020-01-01	1.			

3. To select a time unit to group data events, click **Options** and choose a different timescale. For example, select **Y** to select a yearly timescale or select **M** to select a monthly timescale.

The following image shows the data events that occurred from the month of January 2019 up to July 2019:

From:			ToTimesco	ile (mont	h)	
2019-07-	01 15:(	m	auto	Y M	D HH	mm
- 1	2020-01-0	3				
0 {	4					
		e: 2020-01 : 2020-01-				
	4					
	Start Date	e: 2020-01	-02			
	End Date	2020-01-	02			

4. To view the existing values of a data event for a specific date, click the event, and then click **Open for Effective Date**.

The data event opens in the Data view and displays the existing values for the specified effective date. The following image shows the existing data event values for Adam, Mary that is effective on October 01, 2019:

DAM,MARY	Effective Date 1/Oct/2	2019 17 Apply	Show Effective Periods			
E						
Data	▼ ADAM,MARY					
E	Name Prefix Cd	MISS		First Name	MARY	
XREF	Last Name	ADAM				
X	Generation Suffix Cd			Birthdate		
History	Gender Cd	FEMALE		Tex ID		
	Preferred Phone			Int_tkt		
12	Float_fld	201910.0				
Effective Periods	Address			Nickname		
	Marital Status			Birth Last Name		
	Birth State			Brith Country Cd		
	Criminal Record			Death Date		
	Ethnicity Type			Is Employee Ind		
	Primary Language			Eff Start Date		
	Remarks					

## Adding Data Change Events

You can add the data change events of a child record to the timeline in the Timeline view.

- 1. Open a record in the Timeline view.
- 2. To view the child record, click the child record tab.

The data change events for the child record appear.

3. Select the data change event that you want to add to the timeline, and then click **Add Record to Timeline**.

The data change event of the child record is added to the timeline.

## **Removing Data Change Events**

You can remove data change events for a child record from the timeline in the Timeline view.

- 1. Open a record in the **Timeline** view.
- 2. Optionally, to identify the data change events that occurred up to a specific point in time other than the current date, use the calendar in the **History date up to** field to select a date.

The data change events that occur up to the specified point in time for the record appear.

- 3. To move into view the portion of the timeline that has the data change events that you want to inspect, enter a date range or use the slider.
- 4. To remove a data change event, right-click the event, and then click **Remove record from timeline**. The data change event is removed from the timeline.

# Part II: Data Director with Subject Areas

This part contains the following chapters:

- Adding Subject Area Records, 124
- Investigating Data Changes in the History View (Legacy), 127
- Merging Records in the Matches View, 132
- Unmerging Records in the XREF View, 137
- Search Queries from the Data Tab, 143
- Working with Records in the Data Tab, 154
- Investigating Hierarchies and Relationships, 161
- Investigating Timeline Data in the Effective Periods View, 174
- Importing Data, 177

## CHAPTER 14

## Adding Subject Area Records

This chapter includes the following topics:

- Adding Records in the Data View Overview, 124
- Creating Records in the Data View, 125

## Adding Records in the Data View Overview

To create records based on a subject area, use the **New** tab with the **Subject Area** option and select a subject area.

Note: To use the New tab, your user role must include the Create permission for subject areas.

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.

#### Example of Adding Subject Areas in the Data View

You are an insurance agent for a large insurance company. You have a new customer, Anthony Lomax, on the phone. You want to add Mr. Lomax to the database.

To add Anthony Lomax, you perform the following steps:

- 1. You check for an existing record by running a search. The search returns no results.
- 2. In the navigation bar, click New. In the New window, select Person as the subject area.
- 3. In the Data view, you type in Mr. Lomax's information in the form.

## Creating Records in the Data View

To add a record based on a subject area, start from the **New** tab and select the subject area. The MDM administrator defines the subject areas and the types of data that you need to enter for the subject area.

In the navigation bar, click New. In the New window, select a subject area.
 For example, the application for an insurance company defines a Person subject area within a Customer subject area group. To add Anthony Lomax as a customer, a business user clicks New and then selects Customer > Person.

The **Data** tab contains a **New Person** tab with an empty data entry form. A field name with a red asterisk indicates a required field.

- 2. For each required field, click the field and type the value.
- 3. For each optional field for which you have data, click the field and type the value.
- 4. Optionally, type the URL to an image file in the **image\_url** field. For best results, link to an image that is a maximum of 200 x 200 pixels.

**Note:** For images, the MDM Hub stores the URL, not the file. If the location of the file changes, you must update the URL.

The following image shows some data for a record:

Start	Task Manager Dat	Bing search	Data Quality											
Person name	rowid × New Person	#1 ×												
New Person	n										Ca	Ope	n Hierarchy	۲
	🛨 New Person 🖍													100
E	<ul> <li>Required Input</li> </ul>											App	y り	×
XREF	image_url	http://abc.com/images/	lomax_anthony.png			Name Prefix Cd	Ţ			First Name *	Anthny			
History	Middle Name					Last Name *	Lomax							
	Generation Suffix Cd	×				Birthdate	10/Aug/1965		17					
I≣ Matches	Gender Cd	Ŧ				Tax ID				Display Name				
MidloTipo	Preferred Phone			Q 🐹		Int_fid				Bool_fld				
	Float_fld													
	Address				0	Nickname	Tony			Job Title	Manager			
	Marital Status	SEPARATED V				Birth Last Name	Lomax			Birth City				
	Birth State					Brith Country Cd				Birth Postal Cd				
	Criminal Record	No				Death Date	1	17		Education Level Cd				
	Ethnicity Type					Is Employee Ind				Is VIP Ind				
	Primary Language	English				Eff Start Date	3/Jul/2015 12:00	17		Eff End Date		17		
	Remarks													

5. Click Apply.

The application validates the data. If there are errors, correct them.

- 6. Add data to sections in the **Data** view.
  - a. Expand a section, such as Address or Telephones.
  - b. Click the Add icon.
  - c. Fill in the fields.

The following image shows the **Telephones** section:

▼ Telephones 🖋		
* Required Input		Apply 🕥 🗙
This entity has been created but it is not saved!		
Phone Country Cd		
Phone Number	555-1234	
Phone Ext Number	1212	
Is Valid Ind	C Enable	
Eff Start Date	10/Aug/2015 12:00	
Eff End Date	17	
Do Not Call Ind		
Phone Type	HOME 👻	
	Record 1 of 1	

- d. Click Apply.
- 7. If you need to change the value of a field, click the Edit icon, edit the fields, and click Apply.
- 8. After you finish adding data, save the data.
  - If your user role permits you to save data without a review, click **Save**. The application saves the record to the MDM Hub Store in active records.
  - Otherwise, click **Send for Approval**. In the **Create Task** dialog box, review the task details, edit the details as required, and click **OK**. The application saves the record in pending records and initiates a review process.

## CHAPTER 15

# Investigating Data Changes in the History View (Legacy)

This chapter includes the following topics:

- Investigating Data Changes Overview, 127
- Opening the History View, 128
- Viewing Data Events in the History View, 128
- Comparing Data Before and After Data Events, 130

## **Investigating Data Changes Overview**

You can compare the best version of the truth at different moments in time for a particular record or a record version. If you suspect that the data in the record or record version has changed inappropriately, you can use the **History** view to identify the data event that caused the data change.

The **History** view displays a chronology of data changes over the lifespan of the record or a record version. You can view the data that existed in the record or 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, such as an edit or a merge operation.

#### Scenario for Investigating Data Changes

A customer reports that they recently began receiving electricity bills for a property that does not belong to them. You suspect that the record that represents this customer was updated inappropriately. You look in the **History** view for the customer to determine which data event caused the problem.

The customer stated that the billing issue started in June of the current year, so you look for data events in the **History** view chronology that occurred around that time. You see that the record was merged in June. You compare the data before the merge and after the merge. A record for customer Joe Smith was merged with a record for customer John Smith. These records should be two distinct records because they represent two different customers.

## **Opening the History View**

Use the History view to investigate changes to master data.

To open a record in the History view, perform the following action:

- In a Search tab that displays the search results, select a record. Click Open. The record opens in the Data view.
- 2. Click the History icon.

The History view opens.

## Viewing Data Events in the History View

You can view the data changes that a record has undergone in the **History** view. Data events appear in descending order.

1. Open a record in the **History** view.

The changes to the record up to the current date appear.

The following image shows the history of data change events that occurred from January 01, 2008 up to June 07, 2020 for the record, Dunn, Samuel:

< Hatory				1
A rouge     T flee     Search     Cop     Detrifie     Detrifie	New:         2004.01.01 (0)         Image: Control of Cont	Cystom • Re 2020-06-07.2 (11)	DUNN.SAMUEL 2020-06-01 19:03:58 Event Puty Type Person lan Name DURN Puty Type SAM DUR Puty Name SAM DUR Forr, SA SAM DUR SAM DUR SAM DUR Sam SAM DUR SAM	Aher Paran DUPen

2. To view additional details about the history of the data change events, expand the data event.

K Haory			
A Forget	Cptons + Fron: To:	DUNN,SAMUEL 2020-06-01 19:03:58 Event	
Search Q	2008-01-01 0: 🗰 2020-06-07.2 🛗	Before	Alber
	- 2021-01-01 03.00:00	Party Type: Person	Person
Overview		Last Nome: DUNN	DUNN
Dersh		Display Name: SAM DUNIN	A SAMUEL DUNN
	Details Change type: Base object , XREF	Float_Sd.	
	Updated by: mgr2	in_fid:	
		DUNS Number:	
	2020-06-01 19:03:58	Generation Sulfix Cdt	
	DUINN, SAMUEL Change type: Bose object, XIEF, BVT, Merge on target	Bool_fid	
		Middle Name:	
	Updated by: mgr2	Bathdow:	A 1992-02-01 08:02:11
	0	Tax ID:	▲ 555555555
		Sterva Cdi	
	= 2011-01-01 03:00-00	First Name: SAM	A SAMUEL

The following image shows the expanded data change events for the record, Dunn, Samuel:

3. Optionally, to identify the data change events that occurred up to a specific point in time other than the current date, use the calendar to select a date range using the **From:** and **To:** fields.

The history of data change events that occurred up to the specified point in time for the record appear in descending order.

4. Use filters to show or hide different types of events.

The following image shows the available filters:

DUNN, SAMUEL

EF .		
र	🏭 Navigate	<b>▼</b> Filter
ory		
	Apply Filters	Reset Filters
ctive	Show merge event	
ods	Show unmerge eve	ent
hes:	Show BVT update	event
	Show entity update	e event

## **Comparing Data Before and After Data Events**

You can view the best version of the truth for a record at a specific points in time, and then compare the differences. View the data before and after a data event to determine how the data event affected the data in the record.

1. Open the record in the History view.

Changes to the record appear on the timeline.

- Optionally, select filters to show or hide different types of events. 2.
- 3. Optionally, select a time unit to group data events. To do this, click Options and choose a different timescale. For example, select M to select a monthly timescale.

SMITH, JOHN - 1 View History > History Options • Email Oct 5, 2016 Base object event From Before Afte 2016-01-01 03:00 1 2016-10-05 15:52 1 Consolidation Ind 4 4 Cre ted by: admin 0 & Oct 5, 2016 3:52:04 PM Updated By: admin admi last updated on: 2016-10-05T12:51:40.903-07:... 🛕 2016-10-05T12:52:04.802... Details A Oct 5, 2016 3:52:04 0 Updated by: admin Last Rowid System: SYS0 SYSO Hub State Ind: 140881 140881 Rowid Object: & Oct 5, 2016 3:51:40 PM 2016-10-05T12:50:55.819-07: Created on: 2016-10-05112-50-55 819 Def Electronic Addres Updated by: admin A Oct 5, 2016 3:51:40 

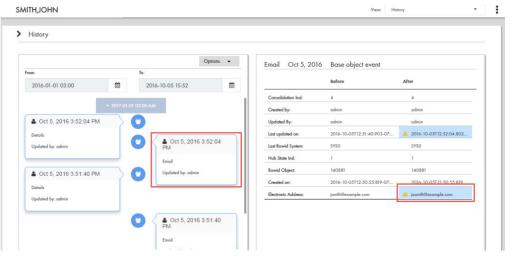
The following image shows data events grouped under the month of October:

Click the event labeled Email. 4.

> The event details panel shows the record details before and after the event and the time when the record was updated. In this example, the email address has changed from jsmith@example.com to jxsmith88@example.com.

#### 5. Click the event labeled **SMITH, JOHN**.

The following image shows that the display name of the record changed from John Smith to John Xavier.



## CHAPTER 16

## Merging Records in the Matches View

This chapter includes the following topics:

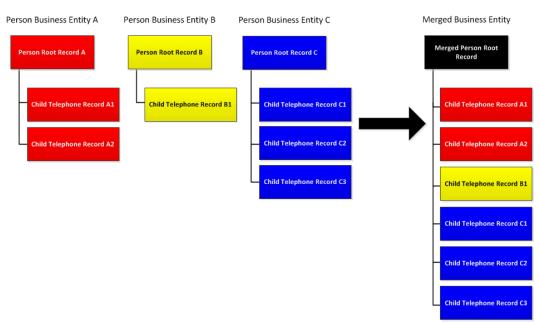
- Merging Records Overview, 132
- Opening the Match Merge Comparison View, 134
- Selecting Merge Candidates, 134
- Overriding the Merge Preview Results, 135
- Merging Records in the Matches View, 136

## Merging Records Overview

You can merge two or more records that contain data for the same record, such as a customer, into a single consolidated record. The record that results from the merge represents the best version of the truth for that record.

Before you merge similar records, you can view the matches for the record in the **Matches** view. When you open a record in the **Matches** view, the SearchMatch API searches for matching records based on the match columns and rule definitions. The IDD application displays the matching record that the SearchMatch API retrieves and the matching record from the matches table.

When you merge record, the root records of the record are consolidated into a single root record. The child records from each of the root records become child records of the merged root record.



#### The following image shows the effect of a merge on the root records and child records:

You can open a record in the **Match Merge Comparison** view. You can view similar records that are potential matches. You can then select records that are potential matches as merge candidates. You can preview the result of a merge between the record and the merge candidates that you select.

If you want to change the winning field value, select a winning field from a different record or manually enter a new value for a field. After you are satisfied that the values in the Merge Preview column are the most correct, you can send a proposal to merge the candidates or merge the candidates immediately.

#### **Example of Merging Records**

You are on the phone with a customer. When you open the record, you see similar records that potentially represent the same customer. You select potential matches as merge candidates, and then preview the result of the merge.

The merge preview looks good, except that you confirm with the customer that the following values are incorrect:

- The records contain two different birth dates for the customer: 23 June 1970 and 19 June 1970. Informatica Data Director selects 23 June 1970 as the correct birthday, but the customer's birthday is 19 June 1970. You manually select 19 June 1970 as the correct birth date.
- The customer mentions that the spelling of the first name that you have on file is incorrect. You override the merge result for the first name and manually enter the correct spelling.

After you are satisfied that the merge preview represents the best version of the truth, you send the proposed merge for review.

## **Opening the Match Merge Comparison View**

Use the Match Merge Comparison view to investigate records with similar data.

- To open a record in the Match Merge Comparison view, perform one of the following actions:
  - In a Search tab that displays search results, select two or more records. Click Actions > Compare.
  - Open a record and click the Matches icon.

The **Match Merge Comparison** view opens. Potential matches for the record appear with a merge preview.

## **Selecting Merge Candidates**

You can use the **Match Merge Comparison** view to see if Data Director has identified any records that potentially match another record. You can then select the potential matches as merge candidates.

The **Match Merge Comparison** view displays the values for the record to which you are comparing in the left hand column. Any records that are potential matches appear in columns to the right of the current record. The merge preview shows the values for the record that would result if you merged the current record with any records that you have selected as merge candidates. When the **Match Merge Comparison** view first appears, the potential matches are not selected as merge candidates.

1. In the Match Merge Comparison view, review the values in the potential matches.

JOSHI

<u>′</u> .	Select the check box for each	ecord that you determine is a duplicate of the current reco				
		JOSHI,ALOK	1. <u>JOSHI,ALOK</u> Match Score: 100			
	General	current record	<u>IDL, 12</u>			
	Name Prefix Cd	DR	DR			
	First Name *	ALOK	ALOK			
	Middle Name		E			

2. Select the check box for each record that you determine is a duplicate of the current record.

The Merge Preview column displays the record that would result from a merge of the current record and the records that you selected as merge candidates. The highlighted fields contribute data to the preview of the merged record.

JOSHI

	JOSHI,ALOK	1. JOSHI,ALOK Match Score: 100	2. JOSHI,ALOK Match Score: 100	☑ 3. <u>JOSHI,ALOK</u> Match Score: 100	Merge Preview	
General	current record			IDL. 12	3 Candidates	
Name Prefix Cd	DR	DR			DR	
First Name *	ALOK	ALOK	ALOK	ALOK	ALOK	
Middle Name		E			E	
Last Name *	JOSHI	JOSHI	JOSHI	JOSHI	JOSHI	
Generation Suffix Cd						
Birthdate			19/Jun/2015		19/Jun/2015	
Gender Cd	FEMALE	FEMALE	FEMALE		FEMALE	
Tax ID						
Display Name	ALOK JOSHI	ALOK JOSHI	ALOK JOSHI	ALOK JOSHI	ALOK JOSHI	
Preferred Phone	555 (666-6666)		555 (444-4444)		555 (444-4444)	

Last Name \*

## **Overriding the Merge Preview Results**

Informatica Data Director determines which field contains the best version of the truth based on the trust score of the field. The field with the highest trust score is considered the most trustworthy. The trust calculations are configured in the MDM Hub Console. You can manually select or enter a value to override the trust calculation.

1. In the Merge Preview column, move the pointer over the right-side of a field to reveal the **Trust Override** button.

Merge Preview	
3 Candidates	
DR	
ALOK	Ň
F	15

2. Click the **Trust Override** button.

A dialog box opens. The name of the field appears in the title bar of the dialog box.

3. To choose the value that is the most trustworthy, select the value.

ect value	e of Birthdate		
	Value	Trust score	Last modified date
$\bigcirc$	23/Jun/1970	90.00	23/Jun/2015 20:51
$\bigcirc$	23/Jun/1970	90.00	23/Jun/2015 20:54
۲	19/Jun/1970	90.00	23/Jun/2015 20:50
$\bigcirc$		17	

4. To enter a new value, select the empty field, and then enter the new value.

ect value	e of First Name		
	Value	Trust score	Last modified date
$\bigcirc$	ALOK	32.00	19/Jun/2015 23:53
$\bigcirc$	ALOC	24.00	20/Jun/2015 00:01
$\bigcirc$	ALOK	89.89	20/Jun/2015 00:02
۲	ALOAK		

5. Click OK.

The values you selected and entered are considered to be the most trustworthy and appear in the preview of the merged record.

## Merging Records in the Matches View

After you are satisfied with the merge results in the Merge Preview column, you can merge the records or send a merge proposal for review.

- 1. Ensure you are satisfied with the results in the Merge Preview column.
- If you want to merge the records, click Actions > Merge. The record is merged.
- 3. If you want to send a merge proposal for review, perform the following steps:
  - a. Click Actions > Create Merge Task.

The Create Task dialog box appears.

- b. Enter a meaningful title for the merge task and change any default task attributes.
- c. Optionally, add comments or attachments for the task reviewer, and click OK.

**Note:** The **File Attachments** section is available only if your IDD global properties are configured to enable attachments for tasks. For more information, see the *Multidomain MDM Data Director Implementation Guide*.

A merge review process begins.

## CHAPTER 17

# Unmerging Records in the XREF View

This chapter includes the following topics:

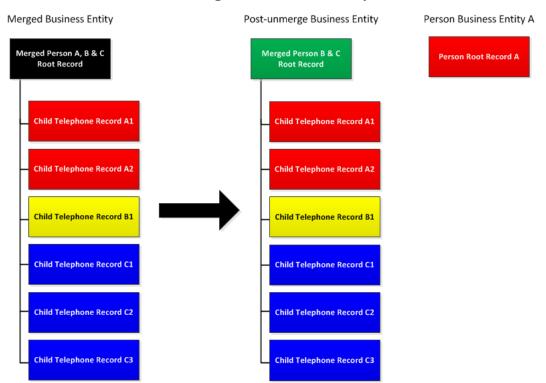
- Unmerging Records Overview, 137
- Opening the XREF View, 140
- Sending an Unmerge Proposal for Review, 141

## **Unmerging Records Overview**

You can unmerge a record that was merged with another record. Use the **XREF** view to see the records that contribute to the best version of the truth for a record. If you identify a cross-reference record that should not be merged with the record, you can unmerge the record if you have permission or you can create an unmerge task. You can unmerge the cross-reference record only or you can unmerge the cross-reference record with lineage.

When you unmerge the cross-reference record only, the child records that were associated with the cross-reference record you unmerge continue to be associated with the merged record.

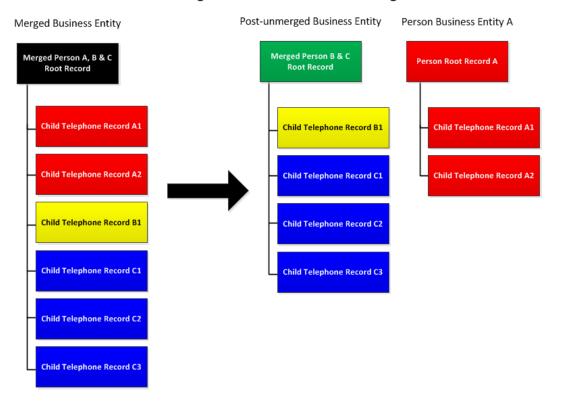
The following image shows the result when you unmerge the cross-reference record only:



#### **Unmerge Cross-reference Only**

When you unmerge the cross-reference record with lineage, the child records are associated with the unmerged record, just as they were before the merge.

The following image shows the result when you unmerge the cross-reference with lineage:



#### **Unmerge Cross-reference with Lineage**

You can unmerge record in the **XREF** view. The cross-reference view shows the best version of the truth for the record and the cross-reference records that have merged with the record. The cross-reference records are organized by the source system from which they originated. The highlighted fields show which values contribute to the best version of the truth. You can select a cross-reference record and create an unmerge task for the record to be unmerged from the record.

The following image shows the XREF view:

SMITH, JOHN			Save Car	ncel
Data	SMITH,JOHN Details			
	Name Prefix Cd	First Name	Middle Name	
XREF	MR	JOHN		
	Last Name	Generation Suffix Cd	Birthdate	
X	SMITH		14/Jun/1962	
History	Gender Cd	Tax ID	Display Name	
i <b>=</b>	MALE		JOHN SMITH	
Matches	Preferred Phone	Int_fld	Bool_fld	
	555 (111-1111)			
	Float_fld			
So	ource Systems 🕑 Show only records with tru	sted values 🕑 Show pending cross-reference	ces Expand All	Collapse All
	Source System : Admin			
C	Customize Table			
	PKEY_SRC_OBJECT 👻 Name Prefix	First Name 🦿 Last Name 🧃 Birthdate 👻	Gender Cd 🧃	
	66160000044000	JOHN SMITH 14/Jun/1962	MALE	
	66160000037000 MR	JOE SMITH 25/Jun/2015		

1. Best version of the truth

2. Contributing cross-reference records

#### Example of Unmerging Record

You realize that two records should not be merged into a single record. You want to undo the merge operation.

You look at the record in the **XREF** view to see which cross-reference records should be unmerged. One cross-reference record represents Joe Smith and the other cross-reference record represents John Smith. The child record contains address information that applies to Joe Smith. You create an unmerge task and recommend to the task reviewer that the cross-reference record be unmerged with lineage. Unmerge with lineage associates the appropriate address records with the unmerged record.

## **Opening the XREF View**

Use the **XREF** view to unmerge merged records. You can also view the source systems and pending crossreference records.

▶ To open a record in the **XREF** view, open a record and click the **XREF** icon.

The **XREF** view opens. Fields display the master data for the selected record. The source systems connected to the record appear below the fields.

## Sending an Unmerge Proposal for Review

Use the **XREF** view to examine the cross-reference records that are consolidated into a record. You can select a cross-reference record to unmerge.

- 1. View the record in the **XREF** view.
- 2. Examine the cross-reference records in the lower half of the view. Identify the cross-reference record to unmerge.

You can click the **Details** tab to view child record data.

3. Right-click the cross-reference record and select **Create Unmerge Task**.

Source Systems 🕑 Show on	ly records with t	rusted values	Show pendin	g cross-referen	ces
- Source System : Admin					
Customize Table					
PKEY_SRC_OBJECT	Name Prefix	First Name	<ul> <li>Last Name</li> </ul>	Birthdate 👻	Gender Cd
66160000044000		JOHN	SMITH	14/Jun/1962	MALE
66160000037000	MR	JOE	SMITH	25/ Jun/2015	
			Use this va	lue instead	
			Unmerge		•
			Create Unr	merge Task լի	D.
			Show Raw Record		5
			Show syste	em columns	

The Create Task dialog box opens.

4. In the **Title** field, enter a meaningful title for the merge task.

For example, enter Unmerge Joe Smith from John Smith.

Create Task				×
Title				
Unmerge Joe Smith from John Smith				
Priority		Due Date		
Normal	-	22/Mar/2018		17
Туре		Subject Area		
Unmerge		Person		
Assign To				
(Auto assign)				
File Attachments				
File Name	Attache	d By	Date Attached	
castor.properties	admin		15/Mar/2018	
Attach a File				
			Browse	
Add Comments				
I recommend an unmerge with lineage.				
			ОК	Cancel

- 5. Change any default task attributes.
- 6. Optionally, add comments or attachments for the task reviewer.

**Note:** The **File Attachments** section is available only if your IDD global properties are configured to enable attachments for tasks. For more information, see the *Multidomain MDM Data Director Implementation Guide*.

7. Click OK.

An unmerge review process begins.

## CHAPTER 18

## Search Queries from the Data Tab

This chapter includes the following topics:

- Search Queries from the Data Tab Overview, 143
- Types of Searches, 143
- Basic and Extended Search Queries, 144
- Advanced Search Queries, 146
- Search Results, 149
- Saved Search Queries, 150

## Search Queries from the Data Tab Overview

Use the **Search Form** to run a search query in the **Data** tab. When you run a query, a search tab opens with the search results. Each search tab is labeled by the search query name, so that you can distinguish each search action. You can open multiple search tabs to perform different types of data search within subject areas and across subject area groups.

You can search using any of the following search types: Basic, Extended, and Advanced. The current search criteria is displayed at the top of your search results for easy reference. If you use a query frequently, consider setting this as your default query. Depending on your environment, in addition to searching with a subject area, you might be able to search across all subject areas within a subject area group.

## **Types of Searches**

In the Data tab, you can perform the following types of searches:

- · Basic Search. Search text, with or without a wildcard.
- Extended Search. Search match-enabled attributes. Supports fuzzy logic matching.
- Advanced Search. Search using a query statement.

#### **Basic Search**

Basic Search uses simple text comparisons to retrieve data based on your search criteria. Basic Search is case sensitive, so you must be careful to use uppercase letters and lowercase letters in the way you expect

them to appear in the master data. You can use a wildcard character in place of a character that could be either uppercase or lowercase. Example: *supplies*.

#### Note:

- In Microsoft SQL Server environments, Basic Search is not case sensitive.
- In Microsoft SQL Server environments, you cannot use square brackets ([]) and a like operator in a search request. To use square brackets in a search query, enclose the first square bracket ([) in an extra pair of square brackets ([[]). For example, to look for a record that starts with a first name like % [ABC123] %, use the following search query:

```
first name like '%[[]ABC123]%'
```

Consider using a Basic Search in the following circumstances:

- You can get reliable results by providing exact text matches and wildcard patterns (or lookup values) in your search criteria.
- You need to search on all available attributes.

#### **Extended Search**

Extended Search uses matching logic and match-enabled attributes to search for records. Extended Search is not case sensitive.

Consider using an Extended Search in the following circumstances:

- You want to expand your search because you did not get the expected results from a Basic Search.
- You want to search using fuzzy logic, which can make reliable matches by taking into account spelling variations, possible misspellings, and other differences that can make matching data non-identical. For example, using fuzzy logic, you can match on variations of the word "Street", such as "St." or "St".

If you use Extended Search, note the following restrictions:

- Fewer attributes might be available to search on. For Extended Search, you can search only on attributes that are configured as match-enabled attributes. On the Search tab, attributes that are not match-enabled are unavailable (grayed out) for search.
- If Extended Search is not available (grayed out) on the **Search** tab, it means that the selected subject area or subject area group does not have an available match-enabled attribute.
- On the Search tab, one attribute (identified by an asterisk) is always required.

#### Note:

- To optimize results and performance, you must define extended searches appropriately.
- When running an Extended Search, you can view the match score for the searched query. You can use the match score to determine how proximate the search result is when compared to the searched query. The maximum value for a match score is 100.

#### Advanced Search

Use the Advanced Query Builder to construct complex query statements.

## **Basic and Extended Search Queries**

You can easily switch between constructing a Basic Search or an Extended Search query.

#### Wildcards in Basic Search

In your search criteria for Basic Search, wildcards are special search symbols that allow you to specify a text pattern instead of specific characters. You would use wildcards to increase your chances of finding the data you want, particularly if you did not know the exact text or were searching for text that is very similar.

**Note:** Wildcards are used in Basic Search only. They are not needed in Extended Search because searching is fuzzy by default.

IDD allows you to use two different wildcard characters

- asterisk (\*)
- percent sign (%)

Their usage and effect on search is identical. These characters are interchangeable, so you can use either one.

You can use wildcards in two different ways:

Wildcard Represents	Description	
Placeholder for all characters to the end	The search looks for the characters to the left of the wildcard, and accepts any characters thereafter. For example, if you specified the following search criteria for First Name: Mar* Or Mar% IDD could return results for: Mary, Mark, Marilyn, Marty	
Placeholder for a single character	The search accepts any single character in the position of the wildcard. For example, if you specified the following search criteria for First Name: T*m or To* IDD could return results for: Tim, Tom	

**Tip:** When using wildcards in Basic Search, make sure that you have positioned the wildcard character correctly. Incorrect placement can yield unexpected search results.

#### Specify Search Criteria

After you have an open query on the **Search** tab, you can specify the search criteria that describes the data you are looking for.

- You must specify search criteria for any required attribute, which is indicated by an asterisk (\*).
- If Extended Search is not available (grayed out), it means that the selected subject area does not have available match-enabled attributes.
- If you select Extended Search, only match-enabled attributes will be available. Unavailable attributes are grayed out. You will not be able to specify search criteria for unavailable attributes.
- For Basic Search, you can use wildcards to specify text patterns for searching.
- If a selected attribute is configured as a lookup (for example, a list of countries), you will see a drop-down list of values to search on.

#### Note:

- For a timeline-enabled primary object, you can perform a search query for an effective date by specifying the search criteria and the effective date in the **Search** workspace.
- If you are performing a search for a timeline-enabled record and if the effective period is blank, the data in the search result is based either on the current effective date or from the base object value.
- To clear the search criteria, select **Reset** from the **Actions** menu. To clear the selection in a drop-down list, click DELETE or BACKSPACE.

#### **Creating Basic or Extended Queries**

To create a query, open the Search Form.

- 1. To open the **Search Form**, in the navigation bar, click **Data**.
- 2. If the Search Form is not visible, click Search Form.
- 3. From the Actions menu, click New > Standard for Basic and Extended queries.
- 4. In the **Query Builder** window, select the subject area or subject area group through which you want to search.
- Expand the Available Attributes list and select the attributes that you want to include as search criteria for this query.

Based on how the application developer configured Informatica Data Director, you can search for data that is outside the selected subject area or subject area group, such as cross-reference data or other subject areas.

- 6. In the **Added Attributes** list, rearrange the sequence of the attributes so that they appear in the order you want in the search query screen.
- 7. If available, select the attribute by which you want the results table sorted, and specify a sort order of ascending or descending.
- 8. Click OK.

The query appears in the Search tab.

9. To use the query again, save the query before you build or open another query.

## **Advanced Search Queries**

Use the **Advanced Query Builder** to construct complex queries using free form query text. Advanced Search provides capabilities for specify search conditions that go beyond the capabilities of standard (basic and extended) queries. Advanced search criteria are used in the query's SQL WHERE clause.

Advanced Search uses SQL syntax and supports:

- Logical operators AND/OR/NOT
- EXIST, NOT EXISTS, and COUNT conditions
- Comparisons operators range comparison (=, >, <, >=, <=, BETWEEN)

Be sure to validate your query syntax. You cannot save a query with invalid syntax.

### **Logical Operators**

Use logical operators when a search query contains multiple conditions.

The following table describes the operators that you can use and provides an example for each operator:

Operator	Description	Example	
AND	Evaluates two conditional expressions and: - Returns TRUE if both conditions are TRUE. - Returns FALSE if either condition is FALSE - Otherwise returns UNKNOWN.	MATCH_PATH_COMPONENT.C_MT_ADDRESS CITY_NAME = 'New York' AND COLUMN.C_PARTY  ORGANIZATION_NAME = 'Informatica LLC'	
OR	<ul> <li>Evaluates two conditional expressions and:</li> <li>Returns TRUE if either condition is TRUE.</li> <li>Returns FALSE if both conditions are FALSE.</li> <li>Otherwise, returns UNKNOWN.</li> </ul>	<pre>MATCH_PATH_COMPONENT.C_MT_ADDRESS CITY_NAME = 'London' OR MATCH_PATH_COMPONENT.C_MT_ADDRESS CITY_NAME = 'Paris'</pre>	
NOT	<ul> <li>Negates the conditional expression that follows.</li> <li>Returns TRUE if the following condition is FALSE.</li> <li>Returns FALSE if the following condition is TRUE.</li> <li>If it is UNKNOWN, it remains UNKNOWN.</li> </ul>	MATCH_PATH_COMPONENT.C_MT_ADDRESS  COUNTRY_CODE = 'USA' and NOT MATCH_PATH_COMPONENT.C_MT_ADDRESS CITY_NAME = 'Los Angeles'	

### **Conditional Operators**

Use conditional operators to restrict your search results based on a supported condition.

The following table describes the operators that you can use and provides an example for each operator:

Operator	Description	Example
EXISTS	Returns true if at least one row meets the specified condition in the subquery. NOT EXISTS is also a valid construct.	EXISTS(C_MT_PERSON_DETAILS, MATCH_PATH_COMPONENT.C_MT_PERSON_DETAILS  BIRTH_CITY = 'NEW YORK')
COUNT	Returns the number of rows that meet the specified condition.	COUNT(C_MT_ADDRESS, MATCH_PATH_COMPONENT.C_MT_PARTY_ADDRESS_REL  ADDRESS_TYPE = 'Shipping')

#### **Comparison Operators**

Use comparison operators when you want to restrict the search results based on the values for the attribute you search on.

Operator	Description	Example
=	equals	<pre>MATCH_PATH_COMPONENT.C_MT_CUSTOMER ACCOUNT_CD = '123456879'</pre>
>	greater than	MATCH_PATH_COMPONENT.C_MT_ADDRESS POSTAL_CD > 42000
<	less than	MATCH_PATH_COMPONENT.C_MT_ADDRESS POSTAL_CD < 30000
>=	greater than or equals	MATCH_PATH_COMPONENT.C_MT_CUSTOMER SALES >= 1000000
<=	less than or equals	MATCH_PATH_COMPONENT.C_MT_CUSTOMER SALES <= 1000000
BETWEEN	between two values (inclusive)	MATCH_PATH_COMPONENT.C_MT_ADDRESS POSTAL_CD BETWEEN 94000 AND 96000

The following table describes the operators that you can use and provides an example for each operator:

#### Date Syntax in Advanced Search Queries

You must use the correct syntax to ensure a query returns the expected results when the query contains date system columns.

All date system columns, such as the CREATE\_DATE column, have a granularity of milliseconds. If you use the '=' comparison operator in a query, you must specify the date to a granularity of milliseconds.

For example, the following query does not return results for records created on August 23, 2013 because it does not specify a date with a granularity of milliseconds:

```
Person.CREATE DATE = '23/Aug/2013'
```

To run a query for a specific date without specifying a granularity of milliseconds, you can run a query on a range for that date.

For example, the following query returns records created on August 23, 2013:

```
Person.Create Date >= '23/Aug/2013' AND Person.Create Date < '24/Aug/2013'
```

#### **Creating Advanced Search Queries**

To create an advance query, use the Advanced Query Builder.

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

In the Data tab, a new tab opens with the Search Form displayed.

2. From the **Actions** menu, select **New > Advanced**.

The Advanced Query Builder - New Query dialog box opens.

- 3. Select the subject area that you want to search from the Subject Area list.
- 4. Select the attributes that you want to include in the search from the Available Attributes field.
  - To include a count for the attribute in your results, click Insert COUNT.

• To check for the existence of data, click Insert EXISTS.

When you select an attribute, the attribute appears in the Query Filter Criteria field.

- 5. Add logical operators, conditional operators, and comparison operators to the query as required.
- Optionally, select a sort option from the Sort Results By list and select an ascending or descending sort order.
- 7. Optionally, enable Case Insensitive search.
- 8. To verify the query syntax, click Validate Query.
  - If the query contains syntax errors, the **Query Validation Error** dialog box opens with a description of the syntax errors. Click **Close**, correct all syntax errors, and then revalidate the query.
  - If the query does not contain syntax errors, a message confirms that the query is valid. Click Close.
- 9. Click OK. IDD revalidates the query to ensure no query syntax errors exist.

If IDD does not detect syntax errors, a search tab opens in the **Data** tab. If IDD detects syntax errors, the **Query Validation Error** dialog box opens. Resolve the query issues and then click **OK** again.

10. Click Run Search.

The query results appear in the Search tab.

#### Example of an Advanced Search Query

```
COLUMN.C PARTY|LAST_NAME like 'H%'
MATCH PATH COMPONENT.C MT PERSON_DETAILS|REMARKS is not NULL
COLUMN.C PARTY|GENDER CD = 'M'
```

## Search Results

After you run a search, the search results appear in a search tab. You can open a business entity from the search results. You can also export search results.

#### **Opening Records from Search Results**

To investigate a record, you can select it from the search results and open the record in the **Data** tab. You search by using the search form in the **Data** tab, by clicking **Queries**, or by using the **Search** box in the header.

When you open a record that is timeline-enabled, specify an effective period for which to view the record. The default value in the field for the effective date is the current date. If you leave the effective date field empty, all the record versions are opened.

- 1. Search for the record.
- 2. In the search results, select the record.
- 3. Open the record in one of the following views:

View	Description
Data	To view and edit the record, click <b>Open</b> .

View	Description	
Matches	To compare the record with potentially duplicate records, click <b>Actions &gt; Compare</b> .	
Hierarchy	To view a diagram of the relationships between records, click <b>Open Hierarchy</b> .	
Business Entity	To view and edit the record in context with other sources of information about the record, click <b>Entity View</b> .	

4. If prompted, specify the effective period that you want to investigate.

The record opens in the view.

#### **RELATED TOPICS:**

• <u>"Resolving Duplicate Records" on page 89</u>

#### **Exporting Search Results**

If available in your environment, you can export all or selected search results to a CSV file.

- To export all results, click Actions > Export > All Results.
- To export some of the results, press the Ctrl key and click the records. Click Actions > Export > Selected Results.

## Saved Search Queries

Consider saving the search queries that you expect to reuse.

To run a query, you must first open it so that it appears in the search form. You can open any available query in the list of saved queries. Available queries are queries that you have created, in addition to queries that others have made public.

You must have read privileges on the columns in the query, read privileges on the subject area, and read privileges on the package that is configured as the search package in the configuration manager tool for the subject area.

#### **Saving Search Queries**

To save a query so you can use it again, save it in the query builder. When you save a query, Informatica Data Director recognizes you as the owner of the query.

- 1. On the Search tab, select **Save** from the **Actions** menu. If you want to save it under a different name, click **Save As** instead.
- 2. In the Save window, you can specify a different query name.
- 3. Indicate whether you want to make this your default query.
- 4. Depending on your environment and role, you might have the option to mark this query as Public, which allows others to use it as well.
- 5. Click Save.

#### **Running Saved Search Queries**

You run saved search queries from the Search Form.

- 1. At the top of the Search Form, select Saved Queries.
- 2. Select a saved query or use the default query.
- 3. Click Open Query.
- 4. Enter values in the fields if required for your search.
- 5. Click Run Search.

The search results appear.

#### Viewing Details About Saved Queries

You can view query details, such as creation date and owner.

- 1. At the top of the Search Form, select Saved Queries.
- Pause over a query. A popup window displays information about the query.

#### Setting Your Default Query

The default query is the query that appears when you open a Search tab. Usually, the default query is the query that you expect to use most frequently in your job. Each user can set their own default query.

By default, no default query is defined. You must explicitly designate the saved query that you want to use. You can change the default query later if you find that you are using another query more frequently.

- 1. At the top of the Search Form, select Saved Queries.
- 2. Select the query that you want to designate as the default query.
- From the Actions menu, click Set As Default. The query name changes to a bold font.

#### **Renaming Saved Queries**

If you created a saved query, you can change the name of the query.

- 1. At the top of the Search Form, select Saved Queries.
- 2. Right-click the query name, and then click **Rename**.
- 3. Type a different name.
- 4. Click Save

#### **Editing Saved Queries**

To change a query that you created, you can edit it and save the changes. You cannot edit queries that you do not own.

- 1. Open the query that you want to edit.
- 2. From the Actions menu in the search form, click Edit.
- 3. In the Query Builder window, make the changes you want.

- 4. Click OK.
- 5. Save your changes.

#### **Deleting Saved Queries**

It is a best practice to delete queries you no longer need. You must be the creator of the query to be able to delete it.

- 1. At the top of the Search Form, select Saved Queries.
- 2. Right-click the query name, and then click Delete Query.

#### **Sharing Saved Queries**

You can share queries with colleagues by making the queries public or by sharing a bookmark link.

#### Making Saved Queries Public

Any Informatica Data Director user can use saved public queries. Only the owner can change their public queries.

- 1. In the Search Form, select Saved Queries.
- 2. Right-click the saved query, and then click Mark as Public / Private.
- To ensure that the query is public, pause on the query. In the popup window, verify that the Visibility setting is set to Public.

#### Sharing Query Bookmarks

To share a specific query with colleagues, copy the bookmark link and paste it in a text or email. When the user follows the bookmark link, the Informatica Data Director opens, prompts the user to log in, and then displays the bookmarked search query.

- 1. In the Search Form, open the query you want to share.
- 2. From the Actions menu, click Show Bookmark.
- 3. Copy the bookmark link. Share the link with another user.

The user can follow the link to view the query.

#### **Exporting Saved Queries**

When you migrate an Informatica Data Director configuration from one environment to another, the saved search queries are not migrated. You can export the saved queries to the target environment if you need to use them.

- 1. Open the Search Form, and then select Saved Queries.
- 2. Right-click the query that you want to export, and then click Export Queries.

The query XML file is downloaded to your browser's default download location.

#### **Importing Saved Queries**

When you migrate an Informatica Data Director configuration from one environment to another, the saved search queries are not migrated. You can import the saved queries from the source to the target environment.

If a query has the same name as the query that is being imported and is owned by the same user, the import process overwrites the query. If a query has the same name as the query that is being imported but is a public query that is owned by another user, the import process creates a version of the query with the same name for the user that imports the query.

If a query has errors, the import process ignores the queries. When queries are ignored, the message Some of the queries were not imported appears. To view the errors, check the Hub server log files.

- 1. At the top of the Search Form, select Saved Queries.
- 2. Right-click in the Search Form, and then click Import Queries.
- 3. In the Import Queries dialog box, click Browse. Select the XML file that contains the saved queries.
- 4. Click Import.

## CHAPTER 19

# Working with Records in the Data Tab

This chapter includes the following topics:

- Working with Records in the Data Tab Overview, 154
- Opening Records from Search Results, 155
- <u>Creating Filters for Child Records, 156</u>
- Switching Between Form and Table View, 157
- <u>Viewing System Columns, 157</u>
- Copying a Record, 157
- Editing Data In Records, 158
- Editing Effective Periods, 158
- Adding an Effective Period, 159
- Display Aggregated Period for Timeline-Enabled Record, 159
- Investigating a Record, 159
- Deleting a Record, 160

## Working with Records in the Data Tab Overview

Use the Data tab to investigate records.

From the **Data** view in the **Data** tab, you can review and edit records. You can also use the left navigation icons to view the history of a record, its cross-reference records, and possible merge candidates.

You can use the **Search Form** in the **Data** view to find records. For more information about searching from the **Data** tab, see "Search Queries from the Data Tab Overview" on page 143.

#### Pending Records in the Data Tab

A pending record contains data that is pending approval.

In the Data tab, pending records are treated in the following ways:

• In search results, records with pending records appear in the results.

- In the **Data** view, when you open a newly created record that is pending approval, the view contains the pending data in the parent record and all its child records.
- In the **Data** view, when you open a record with pending changes to the parent record, the view contains the approved data, not the pending changes.
- In the Data view, when you open a record with pending changes to child records, the view contains the
  approved data, not the pending changes.
- In the **Data** view, when you open a record with new pending child records, the view does not contain the new pending child records.

## **Opening Records from Search Results**

To investigate a record, you can select it from the search results and open the record in the **Data** tab. You search by using the search form in the **Data** tab, by clicking **Queries**, or by using the **Search** box in the header.

When you open a record that is timeline-enabled, specify an effective period for which to view the record. The default value in the field for the effective date is the current date. If you leave the effective date field empty, all the record versions are opened.

- 1. Search for the record.
- 2. In the search results, select the record.
- 3. Open the record in one of the following views:

View	Description	
Data	To view and edit the record, click <b>Open</b> .	
Matches	To compare the record with potentially duplicate records, click <b>Actions &gt; Compare</b> .	
Hierarchy	To view a diagram of the relationships between records, click <b>Open Hierarchy</b> .	
Business Entity	To view and edit the record in context with other sources of information about the record, click <b>Entity View</b> .	

4. If prompted, specify the effective period that you want to investigate.

The record opens in the view.

#### **RELATED TOPICS:**

• <u>"Resolving Duplicate Records" on page 89</u>

## **Creating Filters for Child Records**

In the child tab, if there are multiple child records, you can filter the child records based on the column name and its values to view only a specific (or subset) of entries. All the filters created in the data view are only temporary for that session, when the record is closed, you will lose all the created filters.

Filtering option is only available for One:Many and Many:Many child relationships. Also, if multiple filter conditions are applied, the result contains all the records that satisfy the AND condition and if multiple conditions are set for the same column, the result contains all the records that satisfy the OR condition.

1. In the **Data** view, click the child tab and click the **Filter** button.

The Filter dialog box appears.

2. In the **Column** drop-down list, select a column value.

#### Note:

- Only column names of strings and numbers data types are supported for display in the **Column** dropdown list.
- Lookup values are not displayed in the Column drop-down list.
- 3. Select one of the following filter conditions from the drop-down list:

Available for Data Type	Condition	Description
Strings and Numbers	=	Column value must be equal to the filter criteria
Strings and Numbers	!=	Column value must not be equal to the filter criteria
Numbers	>	Column value must be greater than the filter criteria
Numbers	<	Column value must be lesser than the filter criteria
Numbers	>=	Column value must be greater than or equal to the filter criteria
Numbers	<=	Column value must be lesser than or equal to the filter criteria
Strings and Numbers	Is NULL	Column value must be null for inclusion in the filter results
Strings and Numbers	Is not NULL	Column value must not be null for inclusion in the filter results
Strings	Starts with	Column value must start with the filter criteria
Strings	Ends with	Column value must end with the filter criteria
Strings	Contains	Column value must contain the filter criteria
Numbers	Between	Column value must be between the filter criteria

4. In the Value field, enter a filter criteria.

- If you want to create an additional filter condition, click the add button (green plus button).
   Note: If you want to delete a filter condition, click the delete button (red cross button).
- 6. Click Apply.

Note: If you want to clear filter, click the Clear Filter button.

## Switching Between Form and Table View

In certain cases, you can switch between two different views of data:

- Form View shows a single record, with the record attributes displayed vertically, like a paper form. Click **Switch to Form View** if you want to isolate your investigation to a single record.
- *Table View* shows a list of records (one or more) in a tabular form. Each row in the table represents a separate record. Click **Switch to Table View** to see a summary list of all the associated records.

#### Note:

- For subject area children, the default view (form or table) may vary depending on how your IDD is configured.
- For the selected child record, only associated grandchild records are displayed either in form or table view.

## Viewing System Columns

To view system columns for the record that appears in the **Data** view, select **System Columns** from the **Actions** menu. Data Director opens a window that displays the system column details.

You can view system columns to view record metadata, such as the date on which the record was created, who created the record, and the row ID.

## Copying a Record

You can copy a parent record and some of its children to create a record that is similar to an existing record. You cannot copy a timeline-enabled record.

- 1. In the Data tab, open the record in the Data view.
- 2. Click Actions > Copy.
- 3. In the new record window, change the attribute data you want.
- 4. Select Save or Send for Approval, as applicable.

## **Editing Data In Records**

You can edit data in a record. When you edit data, you cannot change the effective period for the record.

1. Open a record for which you want to edit the data.

You cannot edit a record that is in the pending state because it is part of a workflow and is pending approval.

- 2. Click Actions > Edit Data.
- 3. Edit the data.
- 4. Click Apply.

The fields that you edit appear highlighted.

5. Click Save.

Data Director writes the changes to the database.

## **Editing Effective Periods**

To correct an incorrect effective period, edit the effective period of the record. You can edit the effective periods for records for which you track data change events. When you edit the effective period for a record, Data Director saves the record with the changed effective period.

1. Open the record version for which you want to edit the effective period.

You cannot edit a record that is in the pending state because it is part of a workflow and is pending approval.

- a. Open the record that has the effective period that you want to edit.
- b. Click the Show Effective Periods link for the record.
- c. In the **Effective Date** field, use the date chooser to select a date that is within the effective period that you want to edit.
- d. Click Apply.

The record version that is valid for the effective period that you want to edit opens.

- 2. Click Actions > Edit Period Dates.
- 3. In the **Edit Effective Period** date fields, use the date chooser to select the correct start date and end date of the effective period.
- 4. Select the primary and child records that you want to include in the record version that you update.
- 5. Click Save.

Data Director saves the record version with the updated effective period.

## Adding an Effective Period

You can add a record version that is applicable for a new effective period. The effective period that you add must be adjacent to the existing effective period. You can add effective periods to records for which you track data change events.

- 1. Open a record for which you want to add an effective period.
- 2. Select the record version that you want to copy to the new effective period.
- 3. Click Actions > Create New Period.
- 4. In the **Create New Effective Period** date fields, use the date chooser to select the effective start and end dates.
- 5. Select the primary and child records that you want to include in the new record version.
- 6. Click Save.

Data Director creates a new record version with the effective period that you specify.

## Display Aggregated Period for Timeline-Enabled Record

For a timeline-enabled record, you can click the link **Show Effective Periods** to view the calculated aggregated period of effective periods for the record. Aggregated period is the time period where the data of the record does not change for any of the object (parent, children, and grandchildren). It is the intersection of all the effective periods for the record.

For example, if you save the effective period for the parent record for a time period 01-May-2012 to 31-May-2012 and then you save the effective period of the child record of the same record for a time period 01-May 2012 to 15-May-2012. The aggregated period for the record as on 01-May-2012 is 01-May 2012 to 15-May-2012.

#### Note:

- The link Show Effective Periods is available after the Save operation is completed.
- In the Data view, after you click the link **Show Effective Periods**, you can view the effective start date and effective end date of the object (parent, children, and grandchildren).
- The aggregated period displayed for the record is directly related to the date selected in the **Effective Date** field.

## Investigating a Record

In the **Data** tab, you can change your view of the record. You can view the history of a record, its cross-reference records, its possible merge candidates, and a diagram of related records.

- 1. Open the record in the **Data** view.
- 2. If prompted, specify the effective period that you want to investigate.
- 3. Based on your investigation path, select one of the following views:

- To view and edit the record, click the Data icon. The Data view opens.
- To view pending changes, click the XREF icon. The XREF view opens.
- To view a history of changes to the record, click the History icon. The History view opens.
- To compare the record with potentially duplicate record, click the **Matches** icon. The **Match Merge Comparison** view opens.
- To view a diagram of the relationships within and between records, click the **Open Hierarchy** button. The **Hierarchy** view opens.
- To view and edit the record in context with other sources of information about the record, click the **Entity View** button. An entity tab opens. The tab displays the name of the record.

## **Deleting a Record**

You can delete a record that you want to remove. To delete the record displayed in the **Data** view, select **Delete** from the **Actions** menu.

Data Director marks the record as deleted and no longer displays the record, but does not remove the record from the database. When you delete a parent record, Data Director does not mark the child records as deleted. When you delete a timeline-enabled record, Data Director marks the record as deleted for all the effective periods.

## CHAPTER 20

# Investigating Hierarchies and Relationships

This chapter includes the following topics:

- Investigating Relationships Overview, 161
- Opening a Record in the Network View, 161
- Displaying Records and Relationships on the Canvas, 162
- Investigating Related Records, 167
- Changing Records and Relationships for a Record, 169
- Sharing the Hierarchy View of a Record, 173

## **Investigating Relationships Overview**

A record can have relationships with other records. When the Hierarchy view is enabled, you can view a graph that shows how a record is related to other records.

Use the Hierarchy view to investigate relationships and the related records.

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

## 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, select one or more records and click Open Hierarchy.
  - In the Data tab, open a record and click Open Hierarchy.

The **Network** view opens. The selected record and the related record appear on the canvas.

## Displaying Records and Relationships on the Canvas

You can change the way that records and relationships appear on the Hierarchy canvas. You can change the layout, create and apply filters, hide or show related records, or change other canvas display options.

#### Selecting a Layout

Different layouts can reveal different insights into record relationships. You can customize the size and spacing in some of the layouts.

1. In the canvas, click the Layouts tab.

The Layout panel opens.

2. Click a layout icon.

Layout	Layout Name
	Hierarchy.
	Tree.
	Circular.
	Taxonomy.
	Network.
Sem Dumi     Dumin Thomas     AXX     Kostfore L.F     Discuss Plastic F.	
- Control Control give - Emits Household	Explorer View.

3. Click Apply.

The canvas displays the record relationships in the selected layout. If you can customize the layout, one or more options appear in the **Layouts** panel.

- 4. To customize the layout, set the layout options.
  - To increase a value, move the slider to the right, and then click Apply.

- To decrease a value, move the slider to the left, and then click **Apply**.
- In the Network layout, you can choose whether to show spheres of influence. When selected, the **Sphere of influence** option encloses each record in a circle. The size of the circle reflects the number of direct relationships held by each record. The more direct relationships, the larger the circle.

#### Filtering Records and Relationships

Use filters to show or hide a set of records and relationships. For example, you might want to simplify the view so that you can focus on a particular relationship.

#### **Defining a Filter**

Use the Filters panel below the canvas to select filter options to apply to the canvas.

To enable a filter option, select the option check box. To disable a filter option, clear the check box. Filter options are cumulative. You can select as many or as few as you need to clarify the relationships on the canvas. In logical terms, filters are joined by the AND operator.

1. In the **Hierarchy** view, click the filter icon tab that is located below the canvas.

The Network View Filter panel opens.

2. In the **Hierarchies** section, select the check boxes for one or more types of business entities.

The filter affects all selected types of business entities.

3. Click the name of a business entity type.

The relationship filter options for the selected business entity type appear to the right. The Data Director application developer defines the list of filter options.

- 4. Optionally, change the relationship filter options for the record.
- 5. Optionally, click **General** and change the general filter options:

Option	Description
Hide unconnected entities	Hides records with no relationship to the selected record.
Show pending relationships	Shows relationships that are currently under review.

6. Optionally, click Relationship Directions and change the directional filter options:

Option	Description	
Show Parents	Shows the parents of the selected record.	
Show Children	Shows the child entities of the selected record.	
Show Unknown	Shows records where the relationship between the records is unknown.	
Show Undirected	Shows related records where the type of relationship is not specified.	
Show Bidirectional	Shows related records where the direction of the relationship goes both ways.	

7. Click Apply.

The application applies the selected filter options to the canvas.

#### Saving a Filter

If you expect to reuse the filter options that you applied to the canvas, save the options as a filter. After you save a filter, you can choose to make the filter the default filter whenever the selected record is displayed in the canvas.

- 1. In the Filters panel, click Saved Filters.
- 2. Type a name in the Filter Name field.
- 3. To share the filter with colleagues, select **Public**.
- 4. Click Save.

The filter options that are currently applied to the view are saved.

5. To always apply this filter with the selected record, click the **Default for Entity** button.

#### Applying a Saved Filter

When you apply a saved filter, the filter applies to the types of business entities selected in the filter.

- 1. In the Filters panel, click Saved Filters.
- Select the filter from the Filter Name list.
   The filter options reflect the settings in the selected filter.
- 3. Click Apply.

The canvas reflects the settings in the applied filter.

#### Applying a Default Hierarchy Filter

When you apply a default hierarchy filter, the filter applies to the selected business entity type.

- 1. In the **Filters** panel, click **Defaults**.
- 2. Select the filter from the Default hierarchy list.

The filter options reflect the settings in the selected filter.

3. Click Apply.

The canvas reflects the settings in the applied filter.

#### **Deleting a Saved Filter**

You can delete saved filters that you no longer use. If the filter is public, check with colleagues before you delete it.

- 1. In the Filters panel, click Saved Filters.
- Select the filter from the Filter Name list.
   The filter options reflect the settings in the selected filter.
- 3. Click Delete.

#### Hiding and Showing Records on the Canvas

You can hide or show selected records and records relationships on the canvas. When you hide a record in the canvas, the record relationship to the primary record remains intact, but the record relationship is not shown on the canvas.

After you hide a record, the **Hierarchy** view updates the remaining records that are related to the hidden record. In the canvas, the related records show the number of visible relationships out of the total number of relationships, and display a plus sign icon to show that some relationships are hidden. In the relationship table, the row that represents the hidden entity does not have a canvas icon.

#### Showing Direct and Indirect Relationships

In the **Hierarchy** view, direct and indirect relationships between records are expressed in hops. A hop is a relationship between records. A direct relationship is one hop, while an indirect relationship is more than one hop. For example, given records A, B, C, and D, the relationship A--D is one hop, A--B--D is two hops, and A--B--C--D is three hops. You can change the number of hops that appears for a selected record.

1. In the canvas, click a record.

The Actions menu appears.

- 2. Perform one of the following actions:
  - To view direct relationships, click Actions > Fetch > One Hop.
  - To view direct and indirect relationships, click Actions > Fetch > Many Hops (#).
- 3. Optionally, you can change the number of hops that are shown by the Many Hops (#) option.
  - a. Click Actions > Fetch > Preferences.
  - b. In the **Show Many Hops** dialog box, set a value between 2 and 20.
  - c. Click Execute.
  - d. In the entity box, click the Actions menu.

The Many Hops (#) menu item reflects the value that you set.

e. To apply the new number of hops to the canvas, click Fetch > Many Hops (#).

#### Hiding a Record

If the graph is complex, you can simplify the graph by hiding records that are not meaningful to your investigation. When you hide a record, the record and the record relationships are hidden. You cannot hide the primary record or a record that functions as the anchor of the graph in the canvas.

1. In the canvas, click the record.

The entity Actions menu appears.

2. Click Actions > Hide > Hide Entity.

In the canvas, the record and the record relationships are hidden.

#### **Hiding Selected Records**

Select one or more records to hide. You cannot hide the primary record or a record that functions as the anchor of the graph in the canvas.

1. In the canvas, select records by pressing the Ctrl key and clicking the records.

Selected records are highlighted.

#### 2. On the toolbar, click Actions > Hide Selected Entities.

In the canvas, the selected records and the record relationships are hidden.

#### Hiding the Children of a Record

You can hide the children of a selected record. To qualify as a child record, the Direction type of the child record must be Child.

- In the canvas, click the record. The entity Actions menu appears.
- 2. Click Actions > Hide > Hide Children.

In the canvas, the children of the selected records are hidden.

#### Showing a Hidden Record

You can show a hidden record and the record relationships in the canvas.

- 1. In the canvas, click a record.
- If the relationship table is closed, click the arrow button to open the relationship table.
   The relationship table displays all records that are directly related to the selected record.
- 3. In the relationship table, select the hidden record that you want to show in the canvas.
- 4. Right-click and click Add to Canvas.

In the canvas, the record and the record relationships are displayed.

#### Showing All Hidden Record Relationships

When a entity box includes a plus sign icon in the lower left corner, the record has relationships to hidden record. You can show all the hidden records.

► To show all hidden records, click the **Show** icon in the entity box.

The hidden records and the record relationships are shown on the canvas.

#### Navigating the Canvas

In the canvas, you can zoom in or out on the graph, move around the graph, or move quickly to another part of the graph.

- To zoom in or out on the graph, move the slider up or down.
- To view hidden adjacent parts of the graph, use the direction arrows to move the hidden records into view.
- To navigate quickly through a large hierarchy graph, click the **Navigation** tab and click a different area of the graph. The area appears in the canvas.

#### Setting Canvas Options

You can set options that control the canvas.

• To increase the height of the canvas, click the **Full Screen Mode** icon. The application header and workspace bar are hidden.

- To show the canvas legend, click the **Other** tab. The legend appears on the left.
- To use simple graphics in the canvas when the number of records exceeds a threshold, click the **Other** tab, set a threshold value, and click **Apply**.

## **Investigating Related Records**

As you investigate the relationships for the selected record, you might need to review the details for a related record or for a relationship.

You can view the following kinds of details:

- Record data
- · Source systems and pending records
- System columns
- Relationship details
- Hierarchy
- History of changes

#### Viewing Record Data

If you need more information about a record, you can view the record data. For example, when the hierarchy contains similar records, you might want to confirm that you have the correct record before taking an action.

1. In the canvas, click a record.

The entity Actions menu appears.

- 2. Click Actions > View > Details.
- 3. In the Entity Details window, review the summary details.
  - If the details are sufficient to allow you to continue your work, click Close.
  - If you need more information about the record, click **More Details**. The record opens in a new tab. You can review all the data about the record and, if necessary, edit the data.

#### Viewing Source Systems and Pending Changes

You can view information about contributing source systems and pending changes for a selected record.

In the MDM Hub Store, the information is stored as cross-reference (XREF) records.

1. In the canvas, click a record.

The entity Actions menu appears.

- 2. Click Actions > View > Cross References.
- 3. In the Cross References dialog box, review records.
  - If the details are sufficient to allow you to continue your work, click Cancel.
  - If you need to make changes, edit values, and then click Save.

#### **Viewing System Columns**

Data stewards might be interested in viewing the values in the system columns for a selected record. For example, you can view values for the Rowid Object column and Creator column.

1. In the canvas, click a record.

The entity **Actions** menu appears.

- 2. Click Actions > View > System Columns.
- 3. In the System Columns window, review the values.
- 4. When you are finished, click Close.

#### Viewing and Editing Relationship Details

If you need more information about a relationship, you can view details about the relationship, such as the relationship type.

1. In the canvas, click a relationship line.

The relationship Actions menu appears.

- 2. Click Actions > View Relationship Details.
- 3. In the Edit Relationship dialog box, review the details about the relationship.

Option	Description	
Diagram	Displays a diagram of the related records and the direction of the relationship.	
Hierarchy	The type of the business entity, such as organization or household.	
Relationship Type	The type of relationships that are possible between the records, such as employee or relative.	
Rel Start Date	The start date of the relationship. If the date occurs in the past, the relationship is active. If the date occurs in the future, the relationship will start on the specified date. If the field is empty, a start date was not set.	
Rel End Date	The end date of the relationship. If the date occurs in the past, the relationship has ended and is inactive. If the date occurs in the future, the relationship will end on the specified date. If the field is empty, the relationship is currently considered permanent.	
Switch Entities	You can switch the order of the record to change the direction of the relationship. The <b>Switch Entities</b> button is enabled for some Relationship Types.	
Other fields	Additional fields might appear for some Relationship Types.	

4. Optionally, to change the relationship details, edit options and click Save.

#### Viewing the Hierarchy for a Related Record

To view the relationships for a related record, you can open the related record in a Hierarchy view.

1. In the canvas, click a record.

The entity Actions menu appears.

#### 2. Click Actions > Open in New Tab.

A tab opens and displays the hierarchy for the selected record.

#### Viewing a History of Relationship Changes

You can investigate how relationships have changed for the record that appears in the Hierarchy view.

- 1. On the toolbar, click Actions > Show History.
- 2. In the **Change History** window, below the timeline, drag the timeline slider to the period that you want to investigate. You can expand the period by extending the edges of the timeline slider.

A box highlights the selected time period.

- 3. Right-click the timeline and click Select a Date.
- 4. In the Select a Date dialog box, select a date and time, and then click OK.

An orange line marks the comparison date on the timeline. The left-side graph changes to reflect the graph as it looked on the selected date and time. The right-side graph continues to show the current version of the graph.

- 5. In the **Relationships** row of the timeline, look for change boxes.
  - If the row is empty, there are no changes.
  - Otherwise, pause on a change box to see a change summary. To see details, right-click the box and click **View Event Details**. In the **Event Details** window, review changes, and then click **Close**.
- 6. After you finish your investigation, click Close.

The Change History window closes.

## Changing Records and Relationships for a Record

In the **Hierarchy** view, you can add, edit, and delete related records and relationships for the selected records. If an effective date is set, the update is valid for the selected effective date.

#### Adding a Record to the Canvas

To create a relationship to a record that is not on the canvas, search for the record and add it to the canvas.

1. On the toolbar, click Add to Canvas.

If you navigated to the **Hierarchy** view from the **View** list in an entity tab, the Search dialog box opens. If you navigated to the **Hierarchy** view from the legacy Data tab, the Search dialog box opens.

- 2. If the Search dialog box opens, perform the following steps:
  - a. Optionally, select the type of business entity.
  - b. Type the search term.
  - c. Click Search.

If the search process finds matches, the matching records appear in the search results.

d. Optionally, use the filters to narrow the search results.

- e. If the record appears in the search results, select the record and click **Select**. The record appears on the canvas.
- 3. If the legacy **Search** dialog box opens, perform the following steps:
  - a. Enter the search criteria.
  - b. Click Run Search.
  - c. If the record appears in the search results, select the record and click **Add to Canvas**. The record appears on the canvas.
- 4. Next steps. Create a relationship between the added record and other records.

#### Adding a Relationship

You can create a relationship between two unrelated records as long as a relationship type exists for the business entity types.

- 1. Ensure that both records are visible on the canvas. You might need to use the slider to zoom out the canvas.
- 2. Drag and drop one entity box on top of the other entity box.
- 3. In the Add Relationship dialog box, configure the following options:

Option	Description			
Diagram	Displays a diagram of the related records and the direction of the relationship.			
Hierarchy	The type of the business entity, such as organization or household.			
Relationship Type	The type of relationships that are possible between the records, such as employee or relative.			
Rel Start Date	The start date of the relationship. If the date occurs in the past, the relationship is active. If the date occurs in the future, the relationship will start on the specified date. If the field is empty, a start date was not set.			
Rel End Date	The end date of the relationship. If the date occurs in the past, the relationship has ended and is inactive. If the date occurs in the future, the relationship will end on the specified date. If the field is empty, the relationship is currently considered permanent.			
Switch Entities	You can switch the order of the record to change the direction of the relationship. The <b>Switch Entities</b> button is enabled for some Relationship Types.			
Other fields	Additional fields might appear for some Relationship Types.			

#### 4. Click Save.

In the canvas, a relationship line appears between the two records. If the relationship is directional, the line includes an arrowhead to show the direction.

#### Editing a Record from the Hierarchy View

As you work with related records in the Hierarchy view, you might find that you need to edit data.

1. In the canvas, click a record.

The entity Actions menu appears.

2. Click Actions > Edit > Edit Entity.

A tab opens and displays the record 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.

- 3. Edit data as required and save the changes.
- 4. To return to the Hierarchy view, click the tab that contains the Hierarchy view.

#### Finding Duplicate Records from the Hierarchy View

**Data tab only.** When you open the **Hierarchy** view from within the **Data** tab, you can select a record and search the master data for potential duplicates of the record.

1. In the canvas, click a record.

The entity **Actions** menu appears.

2. Click Actions > Find > Duplicates.

The application searches for similar records. A new tab contains the results of the search.

3. To return to the Hierarchy view, click the tab that contains the Hierarchy view.

#### Initiating a Merge from the Hierarchy View

While working with a graph, you might identify potential merge candidates among the related records. Or, as you investigate a related record, you might want to check for merge candidates. If you find merge candidates, you can initiate the merge from the **Hierarchy** view.

Merge candidates must be of the same type of business entity. For example, to merge customers, both records must be of type Customer.

- 1. If you see two records in the graph that you want to merge, initiate the merge.
  - a. In the **Hierarchy** view, ensure that both records are visible on the canvas. You might need to use the slider to zoom out the canvas.

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

- b. Click one of the records.
- c. Press the **Alt** key while you drag the record onto the other record. An arrow icon indicates that you can merge the records. An **X** icon indicates that you cannot merge the records.

A tab opens and displays the merge candidates. The view contains the destination record, the dragged record, and a merge preview.

- 2. **Data tab only.** Alternatively, you can search the master data for possible merge candidates for a selected record.
  - a. In the canvas, click a record.

The entity Actions menu appears.

- b. Click Actions > Find > Merge Candidates.
- c. In the Search window, enter search criteria, and then click Run Search.
- d. In the search results, select candidates for the merge.
- e. Click OK.

The view contains the record, the selected candidates, and a merge preview.

- 3. Review the merge preview, make changes as required, and initiate the merge.
- 4. To return to the **Hierarchy** view, click the tab that contains the **Hierarchy** view.

#### Deleting a Record from the Hierarchy View

As you work with related records in the **Hierarchy** view, you might find that you want to delete a record. When you delete a record, the record is removed from the view, and the record is marked for deletion in the MDM Hub Store. All the relationships between the deleted record and the selected record are also deleted. You cannot delete the record whose hierarchy you are viewing.

1. In the canvas, click the record that you want to delete.

The entity Actions menu appears.

2. Click Actions > Edit > Detete Entity.

The record and the record relationships are removed from the canvas and the relationship table. The record is marked for deletion in the MDM Hub Store.

#### **Deleting a Relationship**

You can delete relationships between records. You can delete the relationship immediately, or you can cause the relationship to expire with an end date.

The End Date Relationship option is available under the following circumstances:

- The end date is empty.
- The relationship belongs to the current source system specified for the application.
- One cross-reference record persists in the database for the current effective period where the record does
  not intersect with effective periods from other source systems.

You delete relationships from the canvas.

1. In the canvas, click the relationship line.

The relationship Actions menu appears.

- 2. Click Actions.
- 3. Choose how you want to delete the relationship.
  - To delete the relationship and mark it with an end date, click **End Date Relationship**. When prompted for confirmation, click **Yes**. The end date is set to the date before the selected effective date.
  - To delete the relationship from the selected effective period without adding an end date, click Delete Relationship.
  - To delete the relationship for all effective dates, click Delete All Relationship Periods.

The relationship line disappears and the relationship is deleted from both affected records.

## Sharing the Hierarchy View of a Record

You can share the **Hierarchy** view of a record either as a bookmark or as an image. For example, if you want to share a graph with a colleague who has access to Data Director, share a bookmark. If you want to communicate with other colleagues, you can create an image of the graph and insert in a document or other text-based communication tool.

If you want to communicate with other colleagues, you can create an image of the graph and insert in a document or other text-based communication tool.

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

#### Sharing a Bookmark to the Hierarchy View

**Data tab only**. If you want to share the **Hierarchy** view of a record with other Data Director users, you can send the users a bookmark URL. The user needs to log in to Data Director.

The bookmark is a fully qualified URL. You can copy the URL to any text-based communication tool, such as email, text message, instant message, or document.

- 1. Open a record in the Hierarchy view.
- 2. On the toolbar, click the Actions > Show Bookmark.
- 3. In the Bookmark URL window, select the entire URL, right-click, and click Copy.
- 4. Click Close.
- 5. Open the target text-based communication tool, and paste the URL.

#### Saving an Image of the Graph

If you want to share a graph with colleagues, you can export it in JPEG format. You can then use the image in a report or in an email to interested colleagues.

The export process saves images to the browser's default directory for downloads.

1. With the record open, from the View list, select Hierarchy.

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

- 2. If you want to capture a portion of the graph, display the portion of the graph in the canvas.
- 3. On the toolbar, click Actions > Export to JPG.
- 4. In the **Export Graph** dialog box, choose how much of the graph to capture.
  - To capture the visible portion of the graph, select View Port.
  - To capture the entire graph, select Fit. Optionally, you can change the width and height of the image by using the sliders.
- Click Export.

The export process creates the image and saves the image to the downloads directory.

## CHAPTER 21

# Investigating Timeline Data in the Effective Periods View

This chapter includes the following topics:

- Investigating Data Change Events for Effective Periods Overview, 174
- Opening the Effective Periods View, 175
- Viewing Data Change Events, 175

# Investigating Data Change Events for Effective Periods Overview

A data change event is a change to data such as marital status, address, and phone number that is effective for a time period. Records can have multiple data change events. Use the **Effective Periods** view to investigate data change events of records.

The changes to data result in new effective periods or updates to an existing or a future effective period. You can use the **Effective Periods** view to view changes to data over a period of time. Also, you can add and remove data change events to and from the timeline. To manage the data change events, use the **Data** view.

**Note:** If timeline is enabled for base objects in the MDM Hub Store, the **Effective Periods** view is available for those base objects.

#### Example of Viewing Data Change Events

Your organization wants to renew and also offer a new insurance package to Adam Mary. To offer a suitable package, you need to investigate the data change events for the business entity Adam Mary.

You open the business entity for Adam Mary in the Effective Periods view. You specify a specific point in time for which you want to view the data change events for Adam Mary. The data change events that occurred up to the date you specify appear in the view. You select data change events and view the details. You find that in the past, Adam Mary was single and went by the name Alex Mary. You now have the information that will help you offer a suitable insurance package that will benefit Adam Mary and the organization.

## **Opening the Effective Periods View**

Use the Effective Periods view to investigate data with effective dates.

Note: This view is available only if your administrator enabled the timeline feature.

To open a record in the Effective Periods view, perform the following action:

- In a Search tab that displays the search results, select a record. Click Open. The record opens in the Data view.
- 2. Click the Effective Periods icon.

The Effective Periods view opens.

## **Viewing Data Change Events**

You can view the data change events for a record in the Effective Periods view.

1. Open a record in the **Effective Periods** view.

The data change events of the record that occurred to the current date appear in the view.

2. Optionally, to identify the data change events that occurred up to a specific point in time other than the current date, use the calendar to select a date range using the **From:** and **To:** fields.

The data change events that occurred up to the specified point in time for the record appear in descending order.

The following image shows the data change events that occurred from July 01, 2019 up to January 03, 2020 for the record, Adam, Mary:

Options •	ADAM,MARY 2020.1 Effective Date: 2020-01-03	Open For Effective Date
2019-07-01 15:( 📋 2020-01-03 15: 📋		
	Party Type: Pers	a
	Last Name: ADA	м
	Display Name: MAI	Y ADAM
Stort Date: 2020-01-03	Float_fld: 202	2.1
End Date: 2020-01-03	Int_fid:	
	DUNS Number:	
	Generation Suffix Cd:	
Start Date: 2020-01-02 End Date: 2020-01-02	Bool_fid:	
•		
Starr Date: 2020-01-01 End Date: 2020-01-01		

3. To select a time unit to group data events, click **Options** and choose a different timescale. For example, select **Y** to select a yearly timescale or select **M** to select a monthly timescale.

The following image shows the data events that occurred from the month of January 2019 up to July 2019:

From:			To Timesca	le (month)	
2019-07-	01 15:0	m	auto	r M I	D HH mm
- 2	020-01-0	3		•	
0{	4				
		: 2020-01-			
0 <	4				
	Start Date	s: 2020-01	02		
	End Date:	2020-01-	02		

4. To view the existing values of a data event for a specific date, click the event, and then click **Open for Effective Date**.

The data event opens in the Data view and displays the existing values for the specified effective date. The following image shows the existing data event values for Adam, Mary that is effective on October 01, 2019:

ADAM,MARY	Effective Date 1/Oct/	2019 12 Apply	Show Effective Periods			
Data	<ul> <li>ADAM,MARY</li> </ul>					
E	Name Prefix Cd	MISS		First Name	MARY	
XREF	Last Name	ADAM				
X	Generation Suffix Cd			Birthdate		
History	Gender Cd	FEMALE		Tax ID		
	Preferred Phone			Int_fld		
124	Float_fld	201910.0				
Effective	Address			Nickname		
Periods	Marital Status			Birth Last Name		
	Birth State			Brith Country Cd		
	Criminal Record			Death Date		
	Ethnicity Type			Is Employee Ind		
	Primary Language			Eff Start Date		
	Remarks					

## CHAPTER 22

## Importing Data

This chapter includes the following topics:

- Data Import Overview, 177
- Importing Source Data from a File, 178

## **Data Import Overview**

An MDM administrator can permit authorized users to import data from a source file by using Data Director. You can import up to 10,000 records from a single source file.

Note: The data import feature is available only when you use Data Director with subject areas.

You import data to perform the following tasks:

- Create multiple primary, child, and grandchild records in a single bulk operation.
- Update multiple primary, child, and grandchild records in a single bulk operation.

To import data, you need the source file and a data import template. The data import template contains import profiles that map the data in the source file to columns in base object tables.

Data Director does not perform a match for duplicates operation for the data that you import.

For more information about configuring Data Import, see the Multidomain MDM Configuration Guide.

#### Source File

You import data from a source file.

You can use one of the following file formats to contain your source data:

- .csv. A flat file with the data separated by a delimiter, such as a comma.
- .xlsx. A Microsoft Excel workbook with the data organized by columns in a spreadsheet.

## Importing Source Data from a File

Use the import wizard to import the data from the source file to the Operational Reference Store. Data Director uses the Services Integration Framework Put API to import the data.

Important: You cannot roll back changes after you start the import process.

1. In the navigation bar, click New. Select Data Import and the type of subject area.

**Note:** If you do not see the **Data Import** option, the IDD application is not configured to show the option and enable data import. Contact the MDM administrator.

The General page of the import wizard opens.

- If the template contains more than one import profile, select the import profile that you want to use from the list.
- 3. Click Browse and select the source file.
- 4. Click Next.

The Import Properties page opens.

5. If the source file is a .csv file, specify the following properties:

Property	Description
Delimiters	Specify the character that represents the break between data values in the source file.
Code page	Specify the character encoding to use to interpret the data in the source file.
Text qualifier	If quotes appear around text strings, specify the type of quotes.

- 6. If the source file is an .xlsx file, from the **Worksheet name** list, select the worksheet that contains the data.
- 7. To control what data is imported from the source file, set the following properties:

Property	Description
Header	If you want to omit the first line or row because it contains headings rather than data, select <b>First line is header</b> .
Start value import at line	If you want to start the import somewhere other than the first line or row, enter the line number.

- 8. Review the preview of the data.
- 9. Click Next.

The Import Progress page opens.

10. Click Start.

The import process starts. When the import process ends, a message appears.

**Note:** For worksheets, the process attempts to import rows that contain data, rows that are empty but formatted, and rows that are empty but appear between rows that contain data. Data Director rejects the empty rows without processing them.

11. Click Finish.

# Part III: Tasks and Reviews

This part contains the following chapters:

- <u>Tasks, 180</u>
- Participating in Review Processes, 188
- Managing Tasks, 201
- Review Processes Reference, 212

## CHAPTER 23

## Tasks

This chapter includes the following topics:

- Tasks Overview, 180
- Task Manager, 180
- Potential Owners, 186
- Potential Task Actions, 186
- Finding Tasks, 186
- Exporting Tasks , 187

## **Tasks Overview**

A task is an activity that must be completed, such as reviewing an edited record, reviewing a merge proposal, or approving a new record. A workflow consists of multiple tasks linked together.

Tasks are generated by review processes. A review process is an automated business process. When a user adds, edits, merges, or unmerges records, the action can initiate a review process. A review process ensures that business managers or data stewards review and ultimately approve the data before it becomes master data.

A task includes the task details and the associated record that requires review. Tasks require you to take an action, such as accepting or rejecting edits to a record, merging records, or unmerging records. You can work on a task by claiming the task. You can manage tasks by performing task administration actions, such as assigning, releasing, or editing tasks. You can also manage tasks by taking an actions, such as accepting or rejecting.

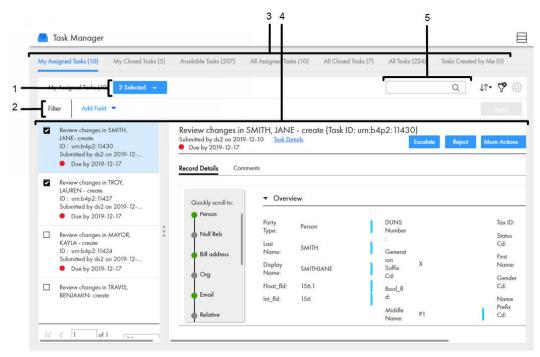
**Note:** If you require different task types, triggers, or workflows, contact your MDM administrator. The MDM administrator can edit your task configurations.

## Task Manager

Use the Task Manager to organize, claim, and resolve tasks that are generated by review processes. You can also perform 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 the associated record.

The following image shows the Details View of the Task Manager with two tasks selected:



- 1. Selected list
- 2. Custom filters
- 3. Quick filters tabs
- 4. View
- 5. Search

The following table describes	the upper interface elements	of the Task Manager
The following table describes	the user interface elements	for the rask manager.

User Interface Element	Description
Selected list	<ul> <li>Performs task administration action on the selected tasks. To use the Selected list, select the check box beside multiple tasks.</li> <li>You can perform the following task administration actions: <ul> <li>Assign</li> <li>Release</li> <li>Edit</li> <li>Claim</li> <li>Task actions, such as Accept, Reject, or Disclaim</li> </ul> </li> <li>Note: The available task administration actions depend on your selected tasks and the ActiveVOS workflows.</li> </ul>
Custom filters	<ul> <li>Filters the tasks based on the filters that you select. To use custom filters, click the Filters icon, and then add filters.</li> <li>You can use any combination of the following filters: <ul> <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> </li> </ul>
View	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 in the Task Manager toolbar.
Quick filter tabs	<ul> <li>Shows tasks based on the predefined filter criteria for the tab.</li> <li>Use one of the following filters: <ul> <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 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> </li> </ul>
Search	Searches the tasks for the search text.

#### **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 following image shows a task selected in the Details View in the Task Manager:

y Assigned Tasks (10) My Closed Tasks (5) Available Tasks (207) A	ull Assigned Tasks (10) All Closed Tasks (7) Al	I Tasks (224) Tasks Created by Me	» (O)
My Assigned Tasks (10)	ges in SMITH, JANE - create (Task ID: ur	n:b4p2:11430)	Q 11. Q 8
Review changes in SMITH, JANE - create ID: urm:b4p2:11430         Submitted by ds2           Submitted by ds2 on 2019-12-10         Due by 2019- Record Details		Escalate Reje	kct More Actions ← Edit Open
Review changes in ALLEN, JOHN - create       ID: um:b4p2:1427       Submitted by 42 on 2019-12-10       Quickly scrol       Due by 2019-12-17	I to:		
Review changes in MATHEWS, TOM - create       ID : umb4p2:11424       Submitted by 42 on 2019-12-10       Due by 2019-12-17	Diselas	DUNS Number : Generat	Tax ID: 123 Status Cd: First Name: JANE
Review changes in TREVORS, TROY - create     Org       ID : urr:b4p2:11209     Email	Float_fld: 156	Suffix A Cd: Bool_fl d:	Gender Cd: FEMALE
Submitted by ds2 on 2019-12-02 Due by 2019-12-09 Relative	m_no. 150	Middle P1 Name:	Prefix Cd:
Names		Birthdat 2011-01-16 00:0	0.00

- 1. Task panel
- 2. 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 the tasks filtered by the first quick filter. 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 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.
Туре	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	Status of the task and the date the task is due.
Due Date	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.
	<ul> <li>The due date of each task is prefixed with one of the following colored dots:</li> <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>

Task Detail	Description
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.

#### **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.

**Note:** If you are a task administrator, you might not have permissions to review the changes in the review panel.

The following table	
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 that you can perform on the task. The possible actions depend on the task definitions in

The following table describes the elements in the review panel:

#### List View

Edit

Open

Actions

More Actions

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 review process. Sample actions can be Approve, Reject, and Disclaim.

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

Additional actions that you can perform on the task.

Opens the record in edit mode.

Opens the record in a separate tab.

Ay Assig	gned Tasks (10)					Q	↓↑• 🖓
	ID	Task Title	Туре	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	02019-12-17	mgr2
	urn:b4p2:11424	Review changes in ALLEN, JENNIFER - create	Review No approve	Normal	2019-12-10	0 2019-12-17	mgr2
	urn:b4p2:11209	Review changes in MAYOR, DAVID - create	Review No approve	Normal	2019-12-02	02019-12-09	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	02019-12-09	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

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.
Туре	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	Status of the task and the date the task is due.
Due Date	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:
	- Red. Indicates that the task is overdue.
	- Amber. Indicates that the task will be overdue in the next 24 hours.
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 who belongs to a user group that can work on a task. The potential owners for a task depend on the selected task 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 John Smith record and a merge task for the Jane Smith record. The potential owners for review tasks are users assigned the Data Steward role, Manager role, or Senior Manager role. The potential owners for merge tasks are users assigned the Manager role and Senior Manager role. When reassigning these tasks together, the potential owners are users assigned the Manager the 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 a task. The potential task actions for a task depend on the selected task 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 John Smith record. The potential task actions for merge tasks are Merge, Cancel, and Disclaim. The potential task actions for 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.

## **Finding Tasks**

You can use quick filters, custom filters, or search in the Task Manager to find tasks to work on or manage. The task panel updates as you select quick filters, add custom filters, and enter search terms.

For example, you might want to find high priority tasks related to the Peter Smith record. To find these tasks, you might use the **Available Tasks** quick filter, add a custom filter for priority, and search for Peter Smith.

The following image shows an example of how you might find a task:

ssigned Tasks (15) My Closed Tasks (5) Ave	ailable Ta	sks (201) All Assigned	Tasks (17) All Closed Tasks (9)	All Tasks (227) Tasks Created by Me	9 (O)
vailable Tasks (1 of 201) 1 Selected 👻					Smith, peter Q 👉 🌱
lter Priority: High 🔻 🛞 Add Field 🔻					Арріу
Review changes in SMITH, PETER - create ID : urm:b4p2:7909 Submitted by ds2 on 2019-09-30 Due by 2019-10-07		Review changes in S Submitted by ds2 on 2019- Due by 2019-10-07 Record Details Comm		k ID: urn:b4p2:7909)	Cloim Open
	000	Ovickly scroll to: Person Null Rels Bill address Org Email Relative	Overview     Party Type: Person     Last Name: SMITH     Display     PETER SMITH     Float_fid: 100.1     Int_fid: 100	DUNS Number : Generat ion X Suffix X Cd: Bool, fld : Middle Name: Birthdat	Tax ID: 123 Storus Cd: Nonne PETER Gender Cd: Nonne Prefix Cd:

**Note:** To use the **Search** box in the Task Manager, your Data Director application with business entities must be configured to use Elasticsearch. Contact your MDM administrator to enable Elasticsearch and configure searchable fields.

## **Exporting Tasks**

You can export the workflow tasks from the Task Manager.

Before you can export the workflow tasks, ensure you navigate to the table view in the Task Manager. Use the Export as Excel icon to download the required workflow tasks.

The following image displays the Export as Excel icon in the Task Manager:

🦲 Task Manager								
My Assigned Tasks (0)	My Closed Tasks (1)	Available Tasks (0)	All Assigned Tasks (0)	All Closed Tasks (8)	All Tasks (8)	Tasks Created by Me (2)		
Tasks Created by Me (	(2)							a 11• 7 🗗 🏶
ID	Task Title		1	ype	Priority		Creator	Creation Date
urn:b4p2:52530	Review cho	anges in Person	1	lotification	Normal		admin	2023-09-08
urn:b4p2:50269	Review cho	anges in Person	1	lotification	Normal		admin	2023-07-26

## CHAPTER 24

# Participating in Review Processes

This chapter includes the following topics:

- Participating in Review Processes Overview, 188
- Claiming a Task, 189
- Resolving a Task, 190
- Organizing Work on Tasks, 198

### Participating in Review Processes Overview

When a business user changes data in Data Director, the change might trigger a review process. A review process is an automated business process workflow that notifies business managers and data stewards when changes are ready for their review.

**Note:** If the Task Manager is not enabled in your application, your user role might not have permission to participate in a review process. In some cases, the review process might not be required in your environment.

The type of review process depends on how the MDM administrator configured your application and whether the default review processes are in use. By default, there are different review processes for edits, merges, and unmerges.

#### Example of a Review Process for Edits

The staff in the Finance department use Data Director to keep supplier banking information up to date. A supplier representative contacts a Finance staff member and requests a change to the supplier's banking information.

In the Finance department, each Data Director user credential includes one of the following user roles:

- User. Staff members have permission to add and change records, but the changes must go through a review process before the master data is updated.
- Manager. A manager is a type of business user with additional permissions. A manager reviews changes, but cannot approve changes. If a manager agrees with a change, he escalates it to a senior manager.
- SrManger. A senior manager is a type of manger with additional permissions. A senior manager reviews
  changes and has the authority to approve them.

A staff member edits the supplier data as requested by the supplier representative. The following steps describe what happens during the review process.

- 1. A staff member changes the banking information of the supplier and saves the change. In the MDM Hub Store, the state of the supplier records changes from active to pending. The proposed edit is saved in a cross-reference record. The save action initiates the review process.
- 2. An instance of a review process starts and begins executing activities.
- 3. When the review process reaches the first people activity, it generates a task notification for managers. For example, in the default review process, the first people activity is Review No Approve. All managers with the role of Manager receive a task notification in the task inbox with the task type of Review No Approve.
- 4. A manager claims the task. The task is assigned to the manager and the task disappears from the task inboxes of the other managers.
- 5. The manager opens the supplier record, reviews the edit, and agrees with the edit. The manager resolves the task by clicking Escalate.
- 6. The review process marks the task as complete, and follows the Escalate flow to the next activity.
- 7. When the review process reaches the next people activity, the process generates a task notification for senior managers. For example, in the default review process, the second people activity is Final Review. All senior managers with the role of SrManager receive a task notification in the task inbox with the task type of Final Review.
- 8. A senior manager claims the task. The task is assigned to the senior manager and the task disappears from the task inboxes of the other senior managers.
- 9. The senior manager opens the supplier record, reviews the edit, and agrees with the edit. The senior manager resolves the task by clicking Approve.
- 10. The review process marks the task as complete, and follows the Approve flow. The review process notifies the MDM Hub that the change is approved, and then the review process ends. The MDM Hub changes the banking information in the supplier banking record. The supplier records change to the active state.

## 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.

 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.

Action	Description
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.
<0ther>	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.
	Note: If this option is not available, click Task Details and select the user from the Assignee 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.
	Note: If this option is not available, use the Release 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.

#### **RELATED TOPICS:**

- <u>"Claiming a Task" on page 189</u>
- "Task Manager" on page 180

#### 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.	
<0ther>	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.

5. 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.
	Note: If this option is not available, click Task Details and select the user from the Assignee 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.
	Note: If this option is not available, use the Release 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.

6. 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.

#### **RELATED TOPICS:**

- "Claiming a Task" on page 189
- <u>"Task Manager" on page 180</u>

#### Reviewing a Merge Task

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

1. In the task inbox of the Home page, click a task that is a request to review a merge proposal.

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. Review the merge preview and determine if the merge is valid. The fields that appear in the merge preview are highlighted.

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

- 4. 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.	<ul> <li>From the Actions menu, select an option:</li> <li>Remove Candidate. Removes a manually added record from the review panel.</li> <li>Not a Match. 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.

5. To resolve the task, select one of the following actions:

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.
	<b>Note:</b> If your environment uses the BE ActiveVOS adapter, click <b>Task Actions &gt; Merge</b> . If your environment uses the Informatica ActiveVOS adapter, click <b>Actions &gt; Merge</b> .
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></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 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.	
	Note: 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.	
	Note: If this option is not available, use the Release button.	

Action	Description	
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.

#### **RELATED TOPICS:**

- "Claiming a Task" on page 189
- <u>"Task Manager" on page 180</u>
- "Resolving Duplicate Records" on page 93

#### Reviewing an Unmerge Task

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

 In the task inbox of the Home page, click a task that is a request to review an unmerge proposal. The unmerge preview for the record appears 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. Review the unmerge preview and determine if the unmerge is warranted. The fields that appear in the preview are highlighted.

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

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

Action	Description
Unmerge	If you agree with the unmerge proposal and the task type 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 proposal, click <b>Cancel</b> and type an explanation in the Comment box. The ActiveVOS Server notifies the person who proposed the unmerge.

Action	Description	
<other></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.

5. 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.
	Note: If this option is not available, click Task Details and select the user from the Assignee 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.
	Note: If this option is not available, use the Release 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.

6. 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.

#### **RELATED TOPICS:**

- "Claiming a Task" on page 189
- <u>"Task Manager" on page 180</u>

#### **Reviewing a Hierarchy Task**

Review the proposed changes to a hierarchy by marking the changes that you want to accept and reject, and then performing a task action.

1. In the Task Manager, select a task that is a request to review an edited hierarchy.

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. Review the changes in the hierarchy.
- 4. To accept or reject the proposed changes, click the appropriate icon beside the change:

Option	Description
Accept icon	Accept the proposed change to the hierarchy.
Reject icon	Reject the proposed change to the hierarchy.

By default, all changes are mark as accepted.

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

Option	Description
Approve	If you think the proposed changes that you accepted and rejected are acceptable, click <b>Approve</b> . The ActiveVOS Server marks the related people activity as completed and performs the next activity in the process.
Cancel	If you think the proposed changes are no longer needed, click <b>Cancel</b> . The ActiveVOS Server closes the task.
Reject	If you want to send the proposed changes back for further review, click <b>Reject</b> . The ActiveVOS Server marks the related people activity as completed and sends the task back to the requester. The task displays the proposed changes that you marked as accept and reject.
Release	To return the task to the pool of unassigned tasks, click <b>Release</b> and type an explanation in the <b>Comment</b> box. Someone with the same role needs to take action on the task.

#### Reviewing a Rejected Hierarchy Task

Review the proposed changes that were marked as accept and reject in the rejected hierarchy task.

1. In the Task Manager, select a task that is a request to review an edited hierarchy.

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. Review the changes that were marked as accept and reject in the hierarchy.

4. To resolve the task, perform one of the following actions:

Option	Description
Submit	If you think the proposed changes are acceptable, click <b>Submit</b> .
Cancel	If you think the proposed changes are no longer needed, click <b>Cancel</b> . The ActiveVOS Server closes the task.
Open	If you want to modify the proposed changes, click <b>Open</b> . Propose changes to the hierarchy and submit your changes for review.

## **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.

#### **RELATED TOPICS:**

• "Task Manager" on page 180

#### 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:

Task Title			
Send for Approval			
Priority	Due Da	te	
Normal	• 201	7/09/05	
Task Type	Assign	to	
Final Review	Adr	nin	٣
Business Entity			
File Attachment			
File Name	Creator	Uploaded	
Onboarding.pdf	jthomas	Jan 1, 2017	
Add Comment			
Type Comment			
All Comments(1)			
adminadded a comment	t - 29/Aug/2017 16:10.37		
Orested tools ""Orest for	Approval""		
Created task ""Send for			

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.
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.
	Note: The File Attachment 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.

 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 25

# Managing Tasks

This chapter includes the following topics:

- Managing Tasks Overview, 201
- <u>Claiming Tasks, 202</u>
- Resolving Tasks, 202
- Organizing Work on Tasks, 209

### Managing Tasks Overview

You can manage tasks associated to business entity records 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.

**User Role Task Administration Actions** Task Administrator Users can perform the following task administration actions on all tasks: - Assian - Release - Edit Other user roles Users can perform the following task administration actions on tasks available to their user role: - Claim Users can perform the following task administration actions on tasks based on whether they are assigned the tasks: - Release - Edit Task actions, such as Accept, Reject, or Disclaim Note: The available task actions depend on the selected tasks and your ActiveVOS workflows.

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

**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.
  - Click the Filters icon, and then add filters.
  - In the search box, enter a search term, and then click the search icon.

For more information, see <u>"Finding Tasks" on page 186</u>.

- 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.
- 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 186.

#### **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.

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.
  - Click the Filters icon, and then add filters.
  - In the search box, enter a search term, and then click the search icon.

For more information, see "Finding Tasks" on page 186.

- 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 <u>4</u> for each edited record that you want to review.
- 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:

Option	Description
Approve	If you agree with the edits and the task types 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.
Escalate	If you agree with the edits, but the task types 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 agree with the edits, but the task types 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.
<0ther>	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 ta

**Note:** Only the potential task actions shared by all the tasks appear. For more information, see <u>"Potential</u> Task Actions" on page 186.

sks are closed.

9. To change the ownership of the tasks without resolving the tasks, 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 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.	

**Note:** Only the potential task actions shared by all the tasks appear. For more information, see <u>"Potential</u> Task Actions" on page 186.

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 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.

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

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.
  - Click the Filters icon, and then add filters.
  - In the search box, enter a search term, and then click the search icon.

For more information, see "Finding Tasks" on page 186.

- 4. 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.
- 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 <u>"Potential</u> Task Actions" on page 186.

Option	Description
Approve	If you think the records are acceptable, and the task types 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 records are acceptable, but the task types do 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 in the records, 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.
<0ther>	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:

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.	
	Note: If this option is not available, close the More Actions dialog box. From the More Actions, select Edit, and then select the user from the Assignee 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.	

**Note:** Only the potential task actions shared by all the tasks appear. For more information, see <u>"Potential</u> Task Actions" on page 186.

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.

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.
  - Click the Filters icon, and then add filters.
  - In the search box, enter a search term, and then click the search icon.

For more information, see "Finding Tasks" on page 186.

- 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.	<ul> <li>From the Actions menu, select an option:</li> <li>Remove Candidate. Removes a manually added record from the review panel.</li> <li>Not a Match. 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.
- 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 <u>"Potential</u> Task Actions" on page 186.

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.
	<b>Note:</b> If your environment uses the BE ActiveVOS adapter, click <b>Task Actions &gt; Merge</b> . If your environment uses the Informatica ActiveVOS adapter, click <b>Actions &gt; Merge</b> .
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></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.

10. To change the ownership of the tasks without resolving the tasks, 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 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.	

**Note:** Only the potential task actions shared by all the tasks appear. For more information, see <u>"Potential</u> Task Actions" on page 186.

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

11. 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.

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

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.
  - Click the Filters icon, and then add filters.
  - In the search box, enter a search term, and then click the search icon.

For more information, see "Finding Tasks" on page 186.

- 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  $\underline{4}$  for each unmerge task that you want to review.
- 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 <u>"Potential</u> Task Actions" on page 186.

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.
<0ther>	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:

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.

**Note:** Only the potential task actions shared by all the tasks appear. For more information, see <u>"Potential</u> Task Actions" on page 186.

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 John Smith 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.
  - Click the Filters icon, and then add filters.
  - In the search box, enter a search term, and then click the search icon.

For more information, see "Finding Tasks" on page 186.

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 <u>"Potential Owners" on page 186</u>.

- 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. If you are a task administration, you might want to reassign tasks claimed by an 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.
  - Click the Filters icon, and then add filters.
  - In the search box, enter a search term, and then click the search icon.

For more information, see "Finding Tasks" on page 186.

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 186.

- 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.
  - Click the Filters icon, and then add filters.
  - In the search box, enter a search term, and then click the search icon.

For more information, see "Finding Tasks" on page 186.

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 Task Details**

You can edit the details of tasks, such as increasing the priority or changing the due date.

1. Click Task Manager.

The task panel contains a list of tasks.

- 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.
  - Click the Filters icon, and then add filters.
  - In the search box, enter a search term, and then click the search icon.

For more information, see <u>"Finding Tasks" on page 186</u>.

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 <u>"Potential Owners" on page 186</u> .	
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 26

## **Review Processes Reference**

This chapter includes the following topics:

- Review Processes Reference Overview, 212
- Update With Approval Workflow, 213
- One Step Approval Workflow, 213
- Two Step Approval Workflow, 214
- Merge Workflow, 214
- Unmerge Workflow, 214

### **Review Processes Reference Overview**

A review process is an automated business process. When a user adds, edits, merges, or unmerges records, the action can initiate a review process. A review process ensures that business managers or data stewards review and ultimately approve the data before it becomes master data.

Your user role determines whether a change to the master data triggers a review. For example, if your user role permits you to add or edit data but not approve changes, then when you save an edit or merge records, the action triggers a review process.

Multidomain MDM ships with the following default review processes:

- Update with Approval Workflow
- One Step Approval Workflow
- Two Step Approval Workflow
- Merge Workflow
- Unmerge Workflow

**Note:** If you see different process names or task types in your task inbox, someone in your organization has changed the review processes or created custom processes.

The following sections describe the purpose of each review process and identify the people activities within each process. To view an entire process, open the process in the ActiveVOS Console.

## Update With Approval Workflow

In the Update With Approval Workflow process, a data steward reviews the changed entity before either canceling the update or sending the update through a two-step approval process.

The following table summarizes the people activities within the process:

People Activity	Role Assigned	Description
Update	DataSteward	A data steward reviews the update and either cancels the update or sends it through a two-step approval process.
Review No Approve	Manager	A manager reviews an update and either rejects it or sends it on for Final Review.
Final Review	SrManager	A senior manager reviews the update and either rejects it or approves it.
Notification	DataSteward	If approved, the data steward receives a notification that the update is approved.

## One Step Approval Workflow

The One Step Approval Workflow process requires one senior manager to review and then approve or reject the update.

The following table summarizes the people activities within the process:

People Activity	Role Assigned	Description
Final Review	SrManager	A senior manager reviews an update and either approves it or rejects it.
Notification	DataSteward	If the update is approved, the record is flagged for promotion and the data steward is notified.
Update	DataSteward	If the update is rejected, the data steward is notified and can cancel the update.

## Two Step Approval Workflow

The Two Step Approval Workflow process requires at least two business managers to participate in the review and approval process.

The following table summarizes the people activities within the process:

People Activity	Role Assigned	Description
Review No Approve	Manager	A manager reviews an update and either rejects it or escalates it to Final Review.
Final Review	SrManager	A senior manager reviews the update and either approves it or rejects it.
Notification	DataSteward	If approved, the record is flagged for promotion and the data steward is notified.
Update	DataSteward	If rejected, the data steward is notified and can cancel the update.

## Merge Workflow

When you select merge candidates, you can create a task that initiates the Merge Workflow process in the ActiveVOS Server.

The following table describes the people activity within the process:

People Activity	Role Assigned	Description
Merge	DataSteward	A data steward reviews the candidates and either merges the records or cancels the action.

## **Unmerge Workflow**

When you unmerge records, you can create a task that initiates the Unmerge Workflow process in the ActiveVOS Server.

The following table describes the people activity within the process:

People Activity	Role Assigned	Description
Unmerge	DataSteward	A data steward reviews the candidate and either unmerges the records or cancels the action.

## INDEX

#### A

advanced queries creating <u>148</u> date format system columns <u>148</u> Advanced Search <u>146</u> application header <u>22</u> assigning tasks <u>200</u>, <u>209</u> assigning back to pool tasks <u>200</u>

### B

Basic Search 144 best version of the truth about 17 bookmarks Hierarchy view, sharing 173 sharing query bookmarks 152 business entities about 17 business entity records adding 37, 39 deleting 74 edited, reviewing 190 editing <u>67</u>, <u>68</u> filtering 56 opening 57 scenario for adding 36 searching 67 searching and editing example 68 viewing 57 business entity relationships example 72 business entity relationshipsediting adding 71 BVT about 17

### С

canvas, Hierarchy See Hierarchy canvas charts about <u>27</u> child records merging <u>96</u>, <u>97</u> chronology History view, viewing <u>128</u> claiming tasks <u>189</u> commands Switch to Form View <u>157</u> Switch to Table View <u>157</u> compare about <u>18</u> composite objects *See business entities* concepts master data management <u>16</u>

### D

data editing 158 data changes before and after, comparing 104, 130 History view, viewing 104 overview 103, 127 data entry forms Business Entities view, using 37, 39 Data view, using 47, 125 data import importing .xlsx data 178 overview 177 data sources best version of the truth 17 Data tab Entity tab, comparison 24 Search tab 143 data validation Business Entity view 36 deleting business entities 74 details view about 182 Display Aggregated Period 159 drafts about 50 adding 51 deleting 52 editing 51 filtering 52 submitting 51 duplicate record about 89 example 93 scenario 93 duplicate records merging 92 duplicates identifying 93

#### E

edited, reviewing <u>203</u> editing business entity records <u>67, 68</u> overview 67 editing (continued) tasks 211 effective period of a record adding 159 editing 158 Effective Periods view overview 174 viewing data change events 175 entities adding, to Hierarchy canvas 169 business 17 copying 157 deleting 160 opening, from search results 149, 155, 159 system columns, in Data view 157 Entity tab Data tab, comparison 24 event data before and after, comparing 130 Extended Search 144 external URLs about 28

### F

feeds social media <u>28</u> filtering business entity records <u>56</u> filters child records in Data view <u>156</u> Hierarchy view <u>163</u> tasks <u>30</u> Form View <u>157</u>

#### G

golden profile about <u>17</u> golden record about <u>17</u>

### Η

hierarchies investigating 161 Hierarchy canvas entities, hiding selected 165 direct and indirect relationships, showing 165 displaying entities and relationships 162 entities, hiding 165 entities, showing 165 entities, showing all hidden 166 entity children, hiding 166 entity, adding 169 entity, showing a hidden 166 hops, showing 165 layout, selecting 162 navigating 166 options, setting 166 Hierarchy view bookmark, sharing 173 entities, deleting 172 entities, editing 171 entities, finding duplicate 171

Hierarchy view (continued) entities, viewing hierarchy of related 168 entity data, viewing 167 entity system columns, viewing 168 filter, saving 164 filters 163 filters, applying default 164 filters, applying saved 164 filters, defining 163 filters, deleting saved 164 history of changes, viewing 169 JPEG image, saving <u>173</u> merge, initiating 171 opening 161 pending changes, viewing 167 relationship details, viewing 168 relationship, creating 170 relationships, deleting 172 source systems, viewing 167 Highcharts 27 History view chronology, viewing 128 data changes, investigating 103, 127 opening 128, 175 Home page about 27 charts 27 external URLs 28 refreshing data 32 social media feeds 28 hops showing, in the Hierarchy canvas 165

IDD application about <u>15</u> images Hierarchy canvas, saving <u>173</u> Informatica Data Director about <u>15</u> Informatica Global Customer Support contact information <u>14</u> interface about <u>22</u> language, change <u>21</u>

#### J

JPEG Hierarchy canvas <u>173</u>

### K

key concepts about <u>16</u>

language changing <u>21, 24</u> legacy views compared to latest views <u>24</u> list view about <u>184</u> localized user interface <u>21</u> logging in <u>21</u>

### Μ

master record about 99 Match Merge Comparison view merge candidates, selecting 134 opening 134 overview of merge 132 matches about 89 matching record about 89, 91 example 93 matches about 91 scenario 93 MDM administrator about 15 merge about 18 candidates, selecting 134 overview 132 preview, overriding 135 proposal, sending for review 136 task, reviewing 193 Merge Preview in Match Merge Comparison 134 merging about 92 child records 96, 97 duplicate records 92, 96 merging duplicates about 89 merging records about 89

### Ν

new, reviewing 204

### 0

objects base <u>17</u> composite See business entities

#### Ρ

parent record finalizing the best version of the truth <u>95</u> identifying duplicates <u>94</u> password changing <u>21</u> potential owners about <u>186</u> potential task actions about <u>186</u> processes review, about <u>18</u>

### Q

queries advanced, creating 148 basic 59 basic or extended, creating 146 creating 59 default 59 default query, setting 151 deleting 152 details, viewing 151 editing 151 exporting 152 extended 59 importing 153 migrating, exporting, importing 64, 65 renaming 151 saving 59, 150 search criteria 145 sharing 59 wildcards in basic search 145 Queries page tab 55 query about 53 basic 58 extended 59 for records 53 types 58 using wildcards 58 query bookmarks sharing 152

### R

reassigning tasks 209 records copying 49 finalizing the best version of the truth 95 finding 53 identifying duplicates 93, 94 merging duplicates 96 new, reviewing 192 resolving duplicates 96 searching 53, 56 related records adding 72 deleting 74 editing 74 viewing 73 relationships adding, in Hierarchy view 170 deleting, in Hierarchy view 172 history of changes, viewing 169 investigating 161 releasing tasks 210 resolving duplicates about 89 example 93 scenario 93

review panel about <u>184</u> review processes about <u>18</u> edit review process, example <u>188</u>

#### S

saved queries about 150 scenario adding business entity records 36, 37 search about 53 Advanced Search 146 Basic Search 144 Extended Search 144 for business entity records  $\underline{67}$ for records 53, 56 in Data tab 143 in Elasticsearch environment 56 search criteria 145 search and compare about 18 search engine about 28 search form saved search, running 151 Search page 53 search queries advanced, creating 148 searching overview 67 searching and editing example <u>68</u> signing in 21 social media feeds about 28 source systems best version of the truth 17 Start page search engine 28 subject area 17 subject area records adding, in the Data View 47, 125 subject areas about 17 submissions} | {publishing{drafts} about 50 system columns Data view, viewing 157 Hierarchy view, viewing 168

### Т

Table View <u>157</u> tabs Search <u>53</u> task inbox about <u>29</u> columns <u>32</u> task manager about <u>180</u> task panel about <u>183</u> task, reviewing <u>205, 207</u> tasks about 18 assigning 200, 209 assigning back to pool 200 business entity records, reviewing 190 claiming 189 disclaiming 200 editing 211 exporting 187 filtering 30 finding 186 merge proposals, reviewing 193 merge tasks, reviewing 205 new records, reviewing 192 overview 180 ownership 189, 200 ownership, setting 200 reassigning 209 releasing 210 resolving 190, 202 reviewing 203, 204 sorting 30 unmerge proposals, reviewing 195 unmerge tasks, reviewing 207 Timeline view adding data change events 121 deleting data change events 122 overview 119 removing data change events 122 viewing data change events 120

#### U

UI language, changing <u>21</u> UI language changing <u>24</u> unmerge example <u>140</u> overview <u>137</u> proposal, sending for review <u>141</u> task, reviewing <u>195</u> user interface about 22

#### V

validation data, Business Entity view <u>36</u> views, legacy language, changing <u>24</u>

### W

wildcards <u>145</u> workflows review processes <u>18</u>

#### Х

XREF view entity, unmerging <u>137</u> opening <u>140</u>