



Informatica® MDM - Customer 360
10.3

Release Guide

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Preface

The *Informatica MDM - Customer 360 Release Guide* lists new features, enhancements, and behavior changes between versions. The *Informatica MDM - Customer 360* is written for the users of Customer 360.

Informatica Resources

Informatica Network

Informatica Network hosts Informatica Global Customer Support, the Informatica Knowledge Base, and other product resources. To access Informatica Network, visit <https://network.informatica.com>.

As a member, you can:

- Access all of your Informatica resources in one place.
- Search the Knowledge Base for product resources, including documentation, FAQs, and best practices.
- View product availability information.
- 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 search Informatica Network for product resources such as documentation, how-to articles, best practices, and PAMs.

To access the Knowledge Base, visit <https://kb.informatica.com>. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at KB_Feedback@informatica.com.

Informatica Documentation

To get the latest documentation for your product, browse the Informatica Knowledge Base at https://kb.informatica.com/_layouts/ProductDocumentation/Page/ProductDocumentSearch.aspx.

If you have questions, comments, or ideas about this documentation, contact the Informatica Documentation team through email at infa_documentation@informatica.com.

Informatica Product Availability Matrixes

Product Availability Matrixes (PAMs) indicate the versions of operating systems, databases, and other types of data sources and targets that a product release supports. If you are an Informatica Network member, you can access PAMs at

<https://network.informatica.com/community/informatica-network/product-availability-matrices>.

Informatica Velocity

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

If you are an Informatica Network member, you can access Informatica Velocity resources at <http://velocity.informatica.com>.

If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at ips@informatica.com.

Informatica Marketplace

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

Informatica Global Customer Support

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

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

<http://www.informatica.com/us/services-and-training/support-services/global-support-centers>.

If you are an Informatica Network member, you can use Online Support at <http://network.informatica.com>.

Part I: Version 10.3

This part contains the following chapter:

- [New Features and Changes \(10.3\), 7](#)

CHAPTER 1

New Features and Changes (10.3)

This chapter includes the following topics:

- [New Features \(10.3\), 7](#)
- [Changes \(10.3\), 9](#)

New Features (10.3)

Attach Documents to a Record

When you create or edit a record, you can attach documents to a record and set the validity period for the documents.

For more information about attaching documents to a record, see the *Informatica MDM - Customer 360 Version 10.3 User Guide*.

Database Schema Validation

Before you upgrade Customer 360, you can validate the database schema to check for any errors. If you find any errors in the validation report, fix them before you upgrade Customer 360.

For more information about validating the database schema, see the *Informatica MDM - Customer 360 Version 10.3 Installation and Configuration Guide*.

Hierarchies Panel

In the customer dashboard, the Hierarchies panel displays how a record is related to other records in a hierarchical format.

You can define a default hierarchy in the Provisioning tool for the Hierarchies panel.

For more information about configuring the default hierarchy, see the *Informatica MDM - Customer 360 Version 10.3 Installation and Configuration Guide*.

Additional Charts

Customer 360 includes the following charts that you can add to a Home page:

- Assigned Tasks By Users

- Closed Tasks By Users
- Open Tasks By Task Type
- Assigned Tasks By User Roles

For more information about these charts, see the *Informatica MDM - Customer 360 10.3 User Guide*.

Ad Hoc Match

Before you import records into Customer 360, you can match the records with the existing records in the Customer 360 database. The match process identifies the matched and unmatched records in the input file. You can then select to import all the records or the unmatched records.

For more information about the ad hoc match, see the *Informatica MDM - Customer 360 Version 10.3 User Guide*.

Data Model Migration

Customer 360 version 10.2 HotFix 2 or later uses the data model based on the Party table. If you upgraded to 10.2 HotFix 2 or use an earlier version of Customer 360, then Customer 360 uses the data model based on the Party Role table.

You can now migrate to the data model based on the Party table from the data model based on the Party Role table. If you do not want to migrate to the data model based on the Party table, you can continue to use the data model based on the Party Role table.

For more information about migrating to the data model based on the Party table, see the *Informatica MDM - Customer 360 Version 10.3 Installation and Configuration Guide*.

Customizing Charts

You can customize a chart to change its characteristics or the information that the chart shows in the Home page. You can also create charts and add them to the Home page.

Use the Highcharts editor to customize or create a chart. The Highcharts editor generates code for the chart that you customize or create. Use the generated code in the Provisioning tool when you create an external resource component for the chart.

For more information about customizing a chart, see the *Informatica MDM - Customer 360 Version 10.3 Installation and Configuration Guide*.

Localization Support

The user interface labels, the error messages, the business entity metadata, and the lookup data of Customer 360 are localized in the following languages:

- Chinese
- English
- French
- German
- Japanese
- Korean
- Portugese

- Russian
- Spanish

The business entity metadata refers to the resources related to the predefined data model, such as business entity names, menu names, field names, and tasks. The lookup data refers to the predefined list values, such as gender, state, and country values.

Changes (10.3)

Upgrade Script

Effective in version 10.3, when you run the upgrade script, the script validates the database schema that you specify and upgrades it. You can validate and upgrade multiple database schemas.

After you upgrade all the required database schemas, you can upgrade Customer 360.

Previously, before upgrading Customer 360, the upgrade script did not validate or upgrade the database schema.

Task Manager Configuration

Effective in version 10.3, to configure the Task Manager in the Provisioning tool, click **Configuration > General Settings**, and then select **Task Manager Configuration**.

Previously, to configure the Task Manager, you clicked **Application Editor**, and then selected **c360ApplicationConfiguration > C360WidgetConfiguration**. The `C360WidgetConfiguration.xml` file contained the Task Manager configuration details.

Dun and Bradstreet Integration

Effective in version 10.3, the support to the out-of-the-box Dun and Bradstreet (D&B) integration is dropped.

Part II: Version 10.2

This part contains the following chapters:

- [New Features and Changes \(10.2 HotFix 2\), 11](#)
- [New Features and Changes \(10.2 HotFix 1\), 13](#)

CHAPTER 2

New Features and Changes (10.2 HotFix 2)

This chapter includes the following topics:

- [New Features \(10.2 HotFix 2\), 11](#)
- [Changes \(10.2 HotFix 2\), 11](#)

New Features (10.2 HotFix 2)

Performance Optimization

The time taken to load the tasks in the **Home** page and the records in the **My Records** page is reduced.

Changes (10.2 HotFix 2)

Data Model

Effective in version 10.2 HotFix 2, the Customer 360 data model for a new installation is based on the Party table. The Party table stores information about a party. A party can be about people or organizations.

Previously, the Customer 360 data model was based on the Party Role table.

Note: Customer 360 supports the Party Role table-based data model, so the existing installations can continue to use the Party Role table-based data model.

For more information about the Customer 360 data model, see the *Informatica MDM - Customer 360 Data Dictionary* in the installation package.

Workflow Process

Effective in version 10.2 HotFix 2, Customer 360 includes a single workflow process named `Customer360Process.bpel`. The workflow process supports the predefined and custom business entities.

Previously, Customer 360 included two workflow processes named `CustomerOrgProcess.bpel` and `CustomerPersonProcess.bpel`. The workflow processes did not support the custom business entities, so you had to customize the workflow processes to support the custom business entities.

CHAPTER 3

New Features and Changes (10.2 HotFix 1)

This chapter includes the following topic:

- [Changes \(10.2 HotFix 1\), 13](#)

Changes (10.2 HotFix 1)

Relationship Types of the CustomerOrg Business Entity Type

Effective in version 10.2 HotFix 1, the CustomerOrg business entity type supports the following relationship types:

- CustomerContact. Specifies the person as a customer and a contact of the organization.
- CustomerEmployee. Specifies the person as a customer and an employee of the organization.
- ContactContact. Specifies the person as a contact of the organization.
- ContactEmployee. Specifies the person as an employee of the organization.

Previously, the CustomerOrg business entity type supported `employee` as its relationship type.

For more information about getting the new relationship types into the repository, see the *Informatica MDM - Customer 360 Installation and Configuration Guide*.