



Informatica® MDM - Customer 360  
10.5 HotFix 3

# User Guide

Informatica MDM - Customer 360 User Guide  
10.5 HotFix 3  
July 2024

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# Preface

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

## Informatica Resources

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

### Informatica Network

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

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

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

### Informatica Knowledge Base

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

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

### Informatica Documentation

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

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

## Informatica Product Availability Matrices

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

## Informatica Velocity

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

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

## Informatica Marketplace

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

## Informatica Global Customer Support

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

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

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

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

# CHAPTER 1

## Introduction to Informatica MDM - Customer 360

This chapter includes the following topics:

- [Overview of Informatica MDM - Customer 360, 11](#)
- [Customer Portal for Organization Records, 12](#)
- [Key Concepts, 12](#)
- [Logging In, 14](#)
- [User Interface, 15](#)

## Overview of Informatica MDM - Customer 360

Informatica MDM - Customer 360 provides clean, consistent, and connected information about customers. Business managers use the master customer data to make better business decisions about customers and manage customer relationships. You can get a single trusted view of a customer.

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

- Streamline the customer onboarding and qualification process.
- Centralize the data about customers in a master database.
- View the relationships between customers, parent companies, subsidiaries, and related organizations.
- Design campaigns based on customer preferences and behavior.
- Improve customer service.
- Connect customer data to the product catalogs and view the buying patterns.
- View customer-to-product relationships.

Customer 360 is based on Multidomain MDM. Business users connect to master customer data through a business-friendly user interface. The user interface displays an enterprise-level dashboard as well as 360 degree customer views that are customized for different business users.

The Customer 360 environment integrates with Informatica Product 360, which is a product information management system.

Use Customer 360 to access the master data that is stored in the Hub Store. Master data is organized by business entities. Business entities are the type of top-level data that has significance for an organization. Business entities include persons and organizations.

Business users use Customer 360 to perform the following activities:

- Add records.
- Search for and edit records.
- Manage relationships between records.
- Participate in review processes for new and changed records.

## Customer Portal for Organization Records

Use the Customer Portal to onboard customer organizations through the online portal.

To onboard customers through the Customer Portal, a customer needs to sign up through the online portal and submit the customer details for review. You can review the customer profiles and approve, reject, or send back the profile for additional information. After a business manager approves a customer profile, the customer can use the Customer Portal to update information, upload documents, and communicate with your organization directly.

## Key Concepts

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

### 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:

- [“Business Users Adding Records Overview” on page 24](#)
- [“Adding a Person Scenario” on page 24](#)
- [“Finding Records” on page 34](#)

## 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, Customer 360 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.

## 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.

## Hierarchies and Relationships

A business entity can have relationships to other business entities. You can view a graph that shows how a business entity is related to other business entities. Use the Hierarchy view to examine the relationships between the open business entity and other business entities.

You can see the business entity relationships in the entity view. The relationship panels on the right display the relationship for the business entity. Use the panels to add relationships.

## DaaS Validation

Validation and verification of postal addresses, email addresses, and phone numbers improves the ability to contact your customers. Use the integration of Customer 360 with Informatica DaaS for data verification and correction. You can verify customer contact information and store accurate data in the database.

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

# Logging In

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

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

The **Log In** page opens.

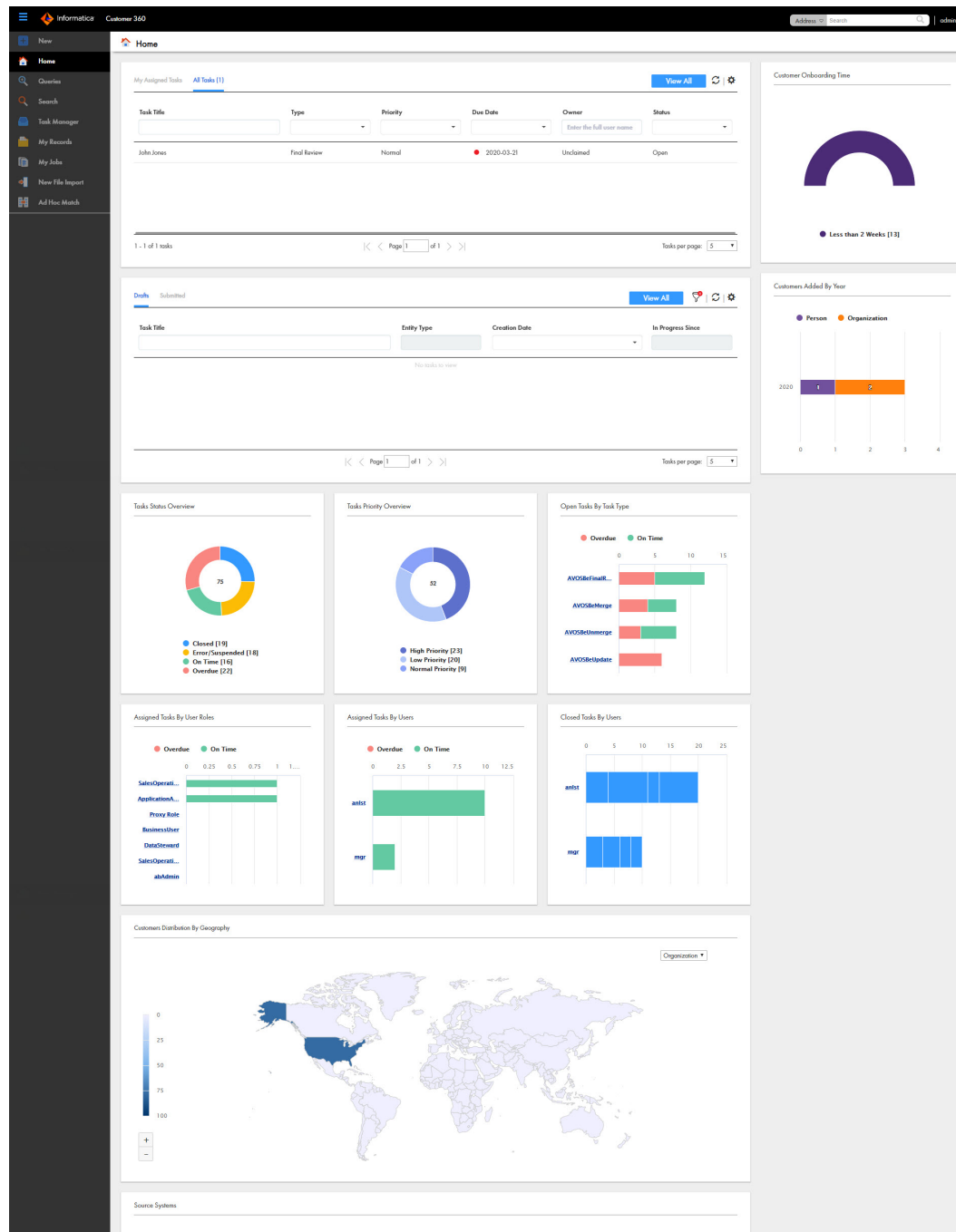
3. Enter your user name and password.
4. Click **Log In**.
5. If prompted, select **Customer 360**.

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

# User Interface

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

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



Customer 360 has the following tabs:

## Home

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

## New

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

## Search

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

## Task Manager

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

## My Records

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

## New File Import

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

## Ad Hoc Match

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

# Charts and Graphs

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

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

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

Chart	Description
Assigned Tasks By User Roles	Displays the total number of tasks assigned to each user role. If you click any user role in the chart, the Task Manager shows a list of tasks that belong to the selected user role.
Assigned Tasks By Users	Displays the total number of tasks assigned to each user. If you click any user in the chart, the Task Manager shows a list of tasks that belong to the selected user.



Chart	Description
Closed Tasks By Users	Displays the total number of tasks closed by each user. If you click any user in the chart, the Task Manager shows a list of tasks that the selected user closed.
Customer Onboarding Time	Displays how long it took to qualify customers.
Customers Added By Year	Displays the number of customers added in each year.
Customer Distribution By Geography	Displays the total number of customers distributed across the world in a map. If you click any country, the chart displays the number of customers distributed across the states of the selected country. If you click any city, a list of customers who belong to the selected city appears as search results.
Open Tasks By Task Type	Displays the total number of tasks that are open for each task type. If you click any task type in the chart, the Task Manager shows a list of tasks that are of the selected task type.
Source Systems	Displays the total number of customers belonging to each source system. If you click any source system, the chart displays a breakdown of total number of customers belonging to the selected source system by year.
Task Priority Overview	Displays the total number of tasks and breaks down the tasks by priority.
Task Status Overview	Displays the total number of tasks and breaks down the tasks by status.

## Task Inbox

A task is a request to participate in a review process. For example, you might need to approve a new record or review changes to a record. You receive task notifications in the task inbox. By default, the task inbox displays the tasks based on the first quick filter. For example, if the first quick filter is My Open Tasks, the task inbox lists all your open tasks.

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

My Assigned Tasks (1)	My Closed Tasks (0)	Available Tasks (1)	All Assigned Tasks (2)	<b>All Closed Tasks (37)</b>	All Tasks (40)	Tasks Created by Me (37)
-----------------------	---------------------	---------------------	------------------------	------------------------------	----------------	--------------------------

Task Title	Type	Priority	Due Date	Owner	ID	Creation Date
Review Changes for ARTWAY Corporation	Commodity Approval	Normal	2020-03-17	com_mgr	umsb4p2.6443	2020-03-10
Review Changes for ARTWAY Corporation	Financial Review	Normal	2020-03-17	fin_mgr	umsb4p2.6487	2020-03-10
Review Changes for ARTWAY Corporation	Contract Review	Normal	2020-03-17	cont_mgr	umsb4p2.6545	2020-03-10
Review Changes for ARTWAY Corporation	Risk Review	Normal	2020-03-17	comp_mgr	umsb4p2.6605	2020-03-10
Review Changes for Nike	Commodity Approval	Normal	2020-03-17	com_mgr	umsb4p2.6139	2020-03-10
Review Changes for Nike	Financial Review	Normal	2020-03-17	fin_mgr	umsb4p2.6196	2020-03-10

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

The following table describes the elements in the task inbox:

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

## My Records Page

Use the **My Records** page to organize your work and get an insight into your drafts.

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

## CHAPTER 2

# Getting Started

This chapter includes the following topics:

- [Getting Started Overview, 19](#)
- [Home Page, 19](#)
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## Getting Started Overview

After you log in to Informatica MDM - Customer 360, you see the **Home** page. The **Home** page is unique to your user role.

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

## Home Page

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

The **Home** page contains the following components:

### **Task Inbox**

After a business user creates or edits record data, the action initiates a business process. The business process generates tasks to managers to participate in the review process. The task inbox displays tasks that you claim and all unclaimed tasks.

### **Drafts and Submissions**

After you create or edit record data, you can save the form as draft to submit later. Users can view only their drafts and submitted forms.

### **Charts and Graphs**

Charts and graphs include tasks overview, customer onboarding time, customers added by year, and source systems.

# 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:

Option	Description
Task Title	Shows tasks that contain the specified text. Enter the text that you want to search for in the task titles.
Type	Shows tasks with the selected task type. Select a task type from the list, such as <b>Final Review</b> or <b>Merge</b> .

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

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

## Configuring the Columns for the Task Inbox

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

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

## Viewing Customer Data

You can view the summary of customer details from a customer dashboard. Search for a customer that you want to view. If multiple business customers appear in the search results, you can use filters to refine the search. After you find the customer, click the customer record to view the details.

### Customer Dashboard

A customer dashboard displays all relevant information of the customer. The dashboard displays customer details, such as contact information, financial data, preferences, previous purchases, hierarchies, tweets, and attached documents.

**Note:** You cannot edit the data in a dashboard view.

The following image shows the dashboard view of a customer record:

The screenshot shows the 'Customer 360' dashboard for a customer named Bill Dow. The interface includes a sidebar with navigation options like Home, Overview, Search, Task Manager, My Records, My Jobs, New File Import, and Add New Match. The main content area is divided into several panels:

- Overview:** Displays a profile picture, full name (Bill Dow), gender (Male), date of birth (9 January 1979), phone numbers, email (bill@gmail.com), and address (2100 Saigon Blvd, United States).
- Identifiers:** Lists various identification numbers including SSN (265-56-5689), TIN (568895478), Driver License Number (F8793767), and Passport Number (F4601845).
- Product Details (7):** A table showing product purchase history with columns for Product Name, Quantity, and Transaction Date. Products listed include 'V7 S40604B-SIN6 6-Corlen S...', '3M™ Adjustable Monitor Stan...', 'Samsung 673 HG28NC673A...', and 'Viewsonic VA2246w LED 22" ...'.
- Documents (0):** A section for managing documents, currently showing 'No documents found'.
- Tags (0):** A section for managing tags, currently showing 'No tags added yet'.
- Financials:** A section for financial data, currently showing 'No related business entry found'.
- Hierarchies (1):** A section for hierarchical data, currently showing 'No related business entry found'.
- Contact Details:** A section for contact information, including address, phone, and email.
- Indicators:** A section for indicators, currently showing 'No indicators found'.
- Tweets:** A section for tweets, currently showing 'No tweets found'.

The Product Details panel displays the product purchase history of the customer. Each product in the panel is a link that you open and view the product details.

The following image shows the details of a product:

The screenshot shows the product details page for a Samsung 673 HG28NC673AF 23" LED-LCD TV. The page includes a product image, a title, and a detailed description. The product is categorized under 'Electronics > Desktops'.

**Product Information:**

- Product Name:** Samsung 673 HG28NC673AF 23" LED-LCD TV - 16:9 - HDTV - ATSC - 1366 x 768 - Dolby Digital Plus, Dolby Pulse, DTS Studio Sound, DTS Premium Sound 5.1 - 10 W RMS - Direct LED - 3 x HDMI - USB - Wireless LAN - Media Player HEALTHCARE TV NO REMOTE
- GTIN:** 1343534543444
- Item Number:** 121667
- Manufacturer:** Samsung Commercial Hospitality Ltd
- Country of Origin:** -

**Long Description:**

Discover advanced TV solutions designed specifically for today's healthcare industry. Samsung's Healthcare TVs have been manufactured with hospital-specific features, such as an interchangeable pillow speaker interface and compatibility with many interactive patient education systems. Facility managers can benefit from up to 50% less energy use with slim direct-led and on-site warranty program.

**Specifications:**

- Alternate Item Number:** -
- Manufacturer Item Number:** 4456677
- Main Supplier:** Electronic Equipment Supply
- Gross Weight:** -
- Minimum Order Quantity:** 1

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

The Documents panel displays the list of documents that belong to a customer. You can filter, sort, and download the documents.

## CHAPTER 3

# Adding Records

This chapter includes the following topics:

- [Adding a Record Overview, 23](#)
- [Customers Signing Up on Customer Portal, 23](#)
- [Business Users Adding Records Overview, 24](#)

## Adding a Record Overview

A customer record is added to the Customer 360 database in the following scenarios:

- A business user approves a customer application that the customer submits in the Customer Portal.
- A business user adds a customer profile in Customer 360.

## Customers Signing Up on Customer Portal

When a customer uses the Customer Portal to sign up and submit the customer application for your organization, a business user can approve the customer application to onboard the customer.

Alternatively, a business user can onboard the customer with basic details and send an invitation to the customer to submit additional customer details for further evaluation through the application on Customer Portal.

All customer applications go through a review process. If an application is approved, the customer becomes an approved user of Customer Portal. An approved user can access all the pages available on the Customer Portal. If an application is sent back to the customer for additional details, the customer needs to re-submit the application with the required details until a business user approves the profile.

# Business Users Adding Records Overview

A business user can use Customer 360 to add records to the master data. The application developer defines the business entities, including the data and structure. The developer also designs the layout of the **Business Entity** views that open when you create a record.

## Data entry form panel

The main panel in the view is the data entry form. Required fields have a red line.

## Similar Records panel

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

**Note:** When a data steward adds a customer organization with a portal user, the portal user can access the portal pages after a business manager approves the organization record.

## Data Validation

When a user adds or changes data, Customer 360 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. Customer 360 has additional validation rules such as validation of government identifiers, addresses, phones numbers, and emails addresses.

Validation processes run at the field level, section level, and record 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.
- Record level. When you save a record in the **Business Entity** view, a server-side validation process verifies that data satisfies the metadata and the validation 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. Click **New**, and then you select **Person** as the business entity.
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.
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, CITIGROUP which is an organization. You want to add CITIGROUP as an Organization record.

To add CITIGROUP, you perform the following steps:

1. Click **New**, and then select **Organization** as the business entity.
2. In the **Legal Business Field**, type CITIGROUP.
3. Fill in all the other required fields.
4. If you see a potential duplicate record in the **Similar Records** panel, open the similar record.
5. Review and confirm that the similar record is not a duplicate record, and then close the similar record.
6. Finish adding data in the data entry form, and then click **Save**.

## Adding a Person Record

To add a Person type record, start from the **New** menu.

1. Click **New**, and then click **Person**.  
The data entry form for **New Person** opens. 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.
3. If the **Similar Records** panel contains a list of similar records, review them.
  - a. In the **Similar Records** panel, click the information icon beside the name of a record.
  - b. Check the other data values to see if the record is the same as the one you are adding.
    - If it is the same record, click **View**. The selected record opens in an entity tab. You can edit data as required. You can view the child records for the record. You can discard the work-in-progress record.
    - If it is not the same record, click **Close**.
  - c. Review other similar records in the same way.
  - d. If a record does not exist, return to the tab containing the work-in-progress customer record.
4. In the customer creation 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 **Apply**.
5. To add a child record to the record, perform the following steps:
  - a. In the navigation menu, click a section name. For example, **Documents**.
  - b. Click **Create Child Record**.  
The data entry form for the child record appears.

The following image shows the data entry form of the **Documents** section:

The screenshot shows a data entry form titled 'Documents (1)'. It contains several input fields: 'Title', 'Valid From', 'File Name', 'Type', 'Valid To', and a 'Browse' button. There are also icons for adding, deleting, and saving records. Numbered callouts point to specific features: 1 points to the 'Table' view icon, 2 points to the 'Form' view icon, 3 points to the 'Create Child Record' icon, 4 points to the 'Discard' icon, and 5 points to the 'Apply' icon.

1. **Table** view
2. **Form** view
3. **Create Child Record**
4. **Discard**
5. **Apply**

**Note:**

- In the table view, if there are more than ten columns and tooltips for the columns, you can resize the columns for an enhanced view of the tooltips.
- In the table view, some field values might appear as **Condition-based Field** if Administrator has configured the visibility of the fields based on field values.

- c. To switch from the form view to the table view of the fields, click **Table**.
- d. Fill in the fields.

For a file attachment field, browse and select the file you want to attach, and then click **Open**.

**Note:** By default, you can attach .pdf and .jpg files.

- e. Click **Apply**.
6. After you finish adding data, click **Save**.

By default, the **Draft** check box is selected. When you click **Save**, the in-progress customer record is saved as a draft. Later you can submit the record for approval. If you do not want to save the record as draft, clear the check box before you save the record.

**Note:** If you are a user with an approver role, ensure that you clear the draft check box.

If your user role permits you to save data without a review, Customer 360 saves the record as an active record. Otherwise, Customer 360 saves the record as a pending record and initiates the review process associated with your role.

## Adding an Organization Record

To add an organization record, select the business entity as Organization.

1. Click **New**, and then select **Organization**.

The data entry form for **New Organization** opens. A red line on a field indicates a required field.

2. Fill in the required fields and other fields as required.

**Note:**

- If you are editing the fields in table view and if the number of columns is more than ten, you can resize the columns for an enhanced view of the tooltips.
- In the table view, some field values might appear as **Condition-based Field** if Administrator has configured the visibility of the fields based on field values.

3. If you want to add the customer as a portal user, enter values for the following fields:

Field	Description
Onboarding Status	Status of the customer organization you want to onboard.
Portal Association	Name of the portal to associate with the customer organization. <b>Note:</b> After you save the record, you cannot change the associated portal for the user.

**Note:** When you add the customer as a portal user, you must add at least one customer administrator user in the **Related Person** section.

4. If you want to add a related person record, perform the following tasks:
- In the **Related Person**, click **Create Child Record**.
  - Type the first name and last name of the person.
  - In the **Relationship Type** box, select one of the following values:
    - Contact. Specifies the person as a contact for the organization.
    - Employee. Specifies the person as an employee of the organization.
  - If you are adding the person as a portal user, enter the values for the following fields:

Field	Description
Email	Email address of the user.
Portal User Role	User role that you want to assign to the portal user. You must add at least one customer administrator user.
Portal User Indicator	Indicates if you want to add the person as a portal user. Select this option.
Portal User Name	User name for the portal user. For example, the email address of the portal user.

- Enter other values as required.
  - Click **Apply**.
5. Click **Save**.
- By default, the record is saved as a draft, and you can later submit the record for approval. If you do not want to save the record as a draft, clear the **Draft** check box before you save the record.

**Note:** If you are a user with an approver role, ensure that you clear the draft check box.

If your user role permits you to save data without a review, Customer 360 saves the record as an active record. Otherwise, Customer 360 saves the record as a pending record and initiates the review process associated with your role.

## DaaS Validation Overview

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

You can analyze, verify, correct, and format addresses according to the local postal standards. Ensure that the email addresses are valid and formatted correctly. Find email domains involved with spam networks,

traps, and other malicious threats and verify that the email address is valid, not valid, or malicious. Verify the phone numbers and ensure your ability to connect.

## Address Verification and Standardization

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

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

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

## Email Address Validation

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

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

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

## Phone Validation

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

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

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

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

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

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

1. Open the record creation form to add a record or search and select a record to edit.
2. Select the check box for the field you want to verify.

To validate address, select **Validate Address**. To validate email address, select **Validate Email**. To validate phone number, select **Validate Phone**.

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

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

4. Click **Save**.

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

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

## Adding a Household

A household is a party group. Create a household and add members of the household.

1. Click **New**, and then select **Household**.  
The data entry form for new household appears.
2. In the **Party Group Name**, enter a name for the household.
3. In the **Household Members** section, to add a household member, perform the following steps:
  - a. Click the **Create Child Record** icon.  
Fields appear where you can enter data.
  - b. Fill in the fields.
  - c. Click the **Apply** icon.
  - d. Repeat step a to step c for additional members.
4. After you finish adding data, click **Save**.

## Adding an Address

Add an address from the **New** menu.

1. Click **New**, and then click **Address**.  
The data entry form for new address appears.
2. In the **Address Line 1** field, enter the primary address information.  
All other fields are optional.
3. Click **Save**.

## Adding a Time Period

Add a time period from the **New** menu.

1. Click **New**, and then click **Time Period**.  
The data entry form for time period appears.
2. From the **Time Period Type** list, select the type.
3. In the **Time Period Name** field, enter a name for the time period.  
All other fields are optional.
4. Click **Save**.

## Adding a Time Period Group

Enter a short description of the task here (optional).

1. Click **New**, and then click **Time Period Group**.  
The data entry form for the new time period group appears.
2. In the **Group Name** field, enter a name of the group.
3. Optionally, enter a description for the group, and then click **Save**.

## Adding a Classification Value

Add a classification value from the **New** menu.

1. Click **New**, and then click **Classification**.  
The data entry form for new classification appears.
2. From the **Classification Type** list, select the classification type, such as NAICS or SIC.
3. In the **Classification Value** field, enter the value, and then click **Save**.

## Adding a Campaign

Add a campaign from the **New** menu.

1. Click **New**, and then click **Campaign**.  
The data entry form for new campaign appears.
2. In the **Campaign Number** field, enter the campaign number.
3. Optionally, enter a description of the campaign.
4. From the **Campaign Type** list, select the campaign type.
5. From the **Campaign Channel Type** list, select the campaign channel type.
6. Specify the reference year.
7. Click **Save**.

## CHAPTER 4

# Working with Draft Records

This chapter includes the following topics:

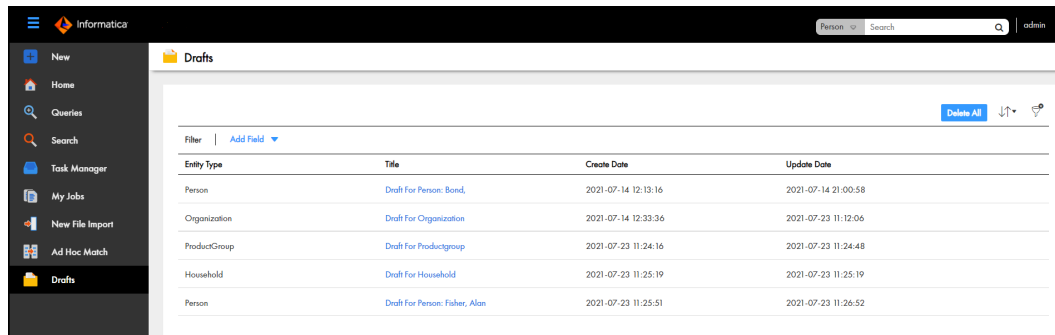
- [Working with Draft Records Overview , 31](#)
- [Adding a Draft Record, 32](#)
- [Editing a Draft Record, 32](#)
- [Submitting a Draft Record , 32](#)
- [Filtering Draft Records , 33](#)
- [Deleting Draft Records, 33](#)

## Working with Draft Records Overview

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

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

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



The screenshot shows the Informatica web interface. On the left is a dark navigation bar with icons and labels: New, Home, Queries, Search, Task Manager, My Jobs, New File Import, Ad Hoc Match, and Drafts (highlighted). The main area is titled 'Drafts' and contains a table of draft records. The table has columns for Entity Type, Title, Create Date, and Update Date. There are also buttons for 'Filter', 'Add Field', and 'Delete All'.

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

## Adding a Draft Record

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

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

## Editing a Draft Record

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

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

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

## Submitting a Draft Record

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

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



# Filtering Draft Records

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

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

# Deleting Draft Records

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

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

## CHAPTER 5

# Finding Records

This chapter includes the following topics:

- [Finding Records Overview, 34](#)
- [Using the Search Box to Find Records, 36](#)
- [Using Queries to Find Records, 39](#)
- [Managing Queries, 43](#)
- [Filtering Child Records, 45](#)

## Finding Records Overview

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

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

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

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

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

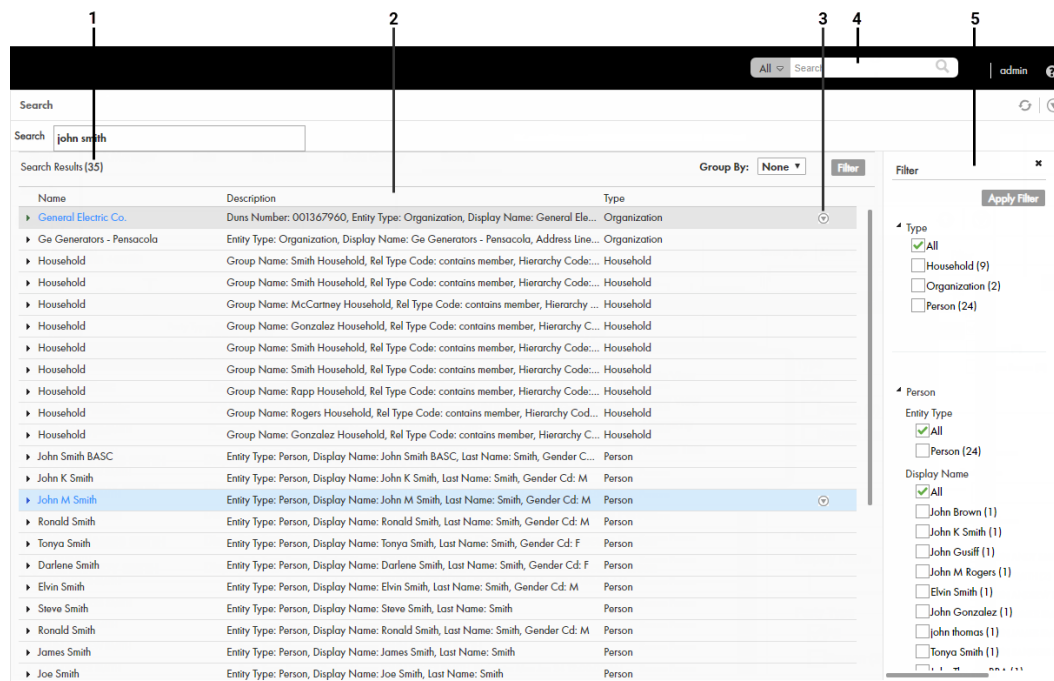
## Search Page

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

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

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

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



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

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

#### Results total

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

#### Search Results panel

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

#### Actions menu

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

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

#### Filter panel

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

#### Filter criteria

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

## Queries Page

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

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

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

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

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

## Using the Search Box to Find Records

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

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

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

## Finding Records in an Elasticsearch Environment

Use the search box to find a record.

- 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.
- 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.
- Click the **Search** icon.  
The search results appear in the **Search Results** panel.
- 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.

- Perform a search.  
The search results appear in the **Search Results** panel in the **Search** page.
- In the **Filter** panel, select or enter a value for the filter criteria that you require.

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

3. Click **Apply**.

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

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

## Viewing and Opening a Record in an Elasticsearch Environment

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

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

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

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

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

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

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

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

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

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

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

The record opens in the view that you select.

# Using Queries to Find Records

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

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

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

## Types of Queries

You can use a basic or an extended query.

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

### Basic Queries

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

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

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

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

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

## Extended Queries

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

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

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

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

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

## Creating a Query

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

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

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

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



- d. Select the sort order of the query to be ascending or descending.
9. If you selected the Advanced query. 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. The corresponding operator list appears below each field.

**Note:** When you add multiple fields to a query, by default the logical operator AND applies to the query.
10. In the operator list, select the operator that you want to apply, and then enter the values from the box that appears below it.
11. 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.
12. Click **OK**.

The query is created and opens on the Queries page.
13. To save the query for reuse, click **Save**.

The **Save Query** dialog box appears.
14. Enter a query name and description.
15. 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.
16. 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.
17. Click **Save**.

The query is saved and appears on the **Saved Queries** panel.

You can run the query that you created, or save the query and run it when needed.

## Running a Query

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

1. In the **Saved Queries** panel, open the query that you want to run.
  - a. If a default query is open, but you want to run a saved query, click the **Back** icon to navigate to the **Saved Queries** page.
  - b. Expand the business entity to which the query belongs.
  - c. Click the query name.

The query form appears.
2. Enter the search criteria for the record that you want to find.
3. Click **Run**.

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

## Viewing Query Results

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

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

The **Record Preview** and the **Business Entity** 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.

**Note:** When you run the predefined General Data Protection Regulation (GDPR) Processing Purpose query, you might not be able to view the search results because the **Search Results** panel might not contain the columns that have data. You need to manually select the columns so that they appear in search results. To customize the query results, refer to [“Customizing Query Results” on page 43](#)

## Opening Records from Query Results

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

1. From the **Search Results** panel, select the record that you want to open.
2. Optionally, to verify that you have the correct record, preview the record.
  - a. Click the **Show Preview** icon.

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

- b. After you preview the record, click **Close**.
3. To open the record, click the **Open in a new window** icon.

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

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

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

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

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

The record opens in the view that you select.

## Customizing Query Results

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

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

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

2. Select the fields that you want to display in the **Search Results** panel.
3. Optionally, change the order in which you want the fields to appear in the search results.
4. Click **OK**.

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

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.

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

The delete confirmation dialog box appears.

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

The query is deleted.

## Saving an Existing Query as a New Query

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

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

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

The **Save As** dialog box appears.

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

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

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

5. Click **Save**.

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

6. Optionally, modify the new query.

a. Click **Actions > Edit**.

b. Edit the query as required.

You can make the following changes to the query:

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

c. Click **OK**.

The query is saved with the changes.

## Filtering Child Records

In a Business Entity view, you can filter 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.

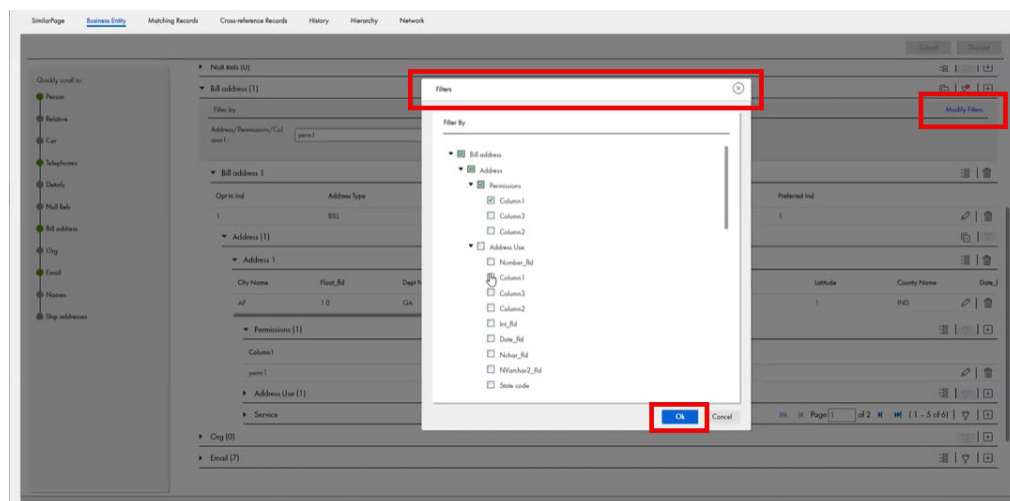
**Note:** In the form view, when you filter by date, the records are filtered by date but not by time.

1. Expand a child record section.

2. Click the **Filter** icon.

Filters popup appears.

The following image shows a Business Entity filter.



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

# Editing Records

This chapter includes the following topics:

- [Editing Records Overview, 46](#)
- [Editing a Single Record, 46](#)
- [Edit Multiple Records, 48](#)
- [Adding and Editing Related Records, 50](#)
- [Deleting a Record, 53](#)
- [Adding a Tag, 53](#)

## 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.

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

1. From the **Search Results** panel of the **Search** page, click the record that you want to edit.  
The Dashboard view of the record opens.
2. From the **View** list, select **Business Entity**.  
The record opens.
3. Click **Edit**.  
**Tip:** If the button is disabled, either you do not have permission to edit the record or the record has changes that are pending approval.
4. Edit the data in the parent record as required.
  - a. Click anywhere in the top section.  
The section becomes editable.
  - b. Edit the data.
  - c. Click the **Apply** icon.
5. Edit the data in child records as required.
  - a. Expand the child section.
  - b. Click the **Edit** icon.  
The section becomes editable.
  - c. Edit the data.
  - d. Click the **Apply** icon.
6. Click the **Save** button.

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

# Edit Multiple Records

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

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

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

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

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

## Editing Multiple Records Scenario

A hospital reports that multiple patient records do not have the correct gender identity recorded. You want to confirm which records are affected and correct the errors.

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

## Trigger the Bulk Edit Review Process

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

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

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

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

## Editing Multiple Records

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

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

1. From the **Search** panel of the **Search** page, search for records that you want to change.  
The records appear in the **Search Results** panel.  
**Note:** You can also use the Queries panel to search for previously searched records.
2. In **Filters** select filters to narrow down your search results.  
The **Search Results** panel displays the records that are directly related to the values that you input in the **Filters** panel.
3. Click the Find and Replace icon.



The **Find and Replace** window opens.

4. In the **Find in:** drop-down list, select a column and enter the value to find in the column.

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

Find in: **First Name**   Replace with:

Party Type	Display Name	Float_fid	Int_fid
Person	ADAM GRAY		
Person	ADAM BOSH		
Person	SAMIR ADAM		
Person	MISS MARY ADAM		
Person	MICHELLE 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.

Find in: **Select a column**   Replace with:

Name Prefix Cd	First Name	DUNS Number	Middle Name	Last Name
MISS	MARY			ADAM
	RAYMOND			ADAM
	LONG LONG LONG LONG LON...			ADAM
	MICHELLE			ADAM
	SAMIR			ADAM

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

# Adding and Editing Related Records

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

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

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

The screenshot shows the 'Relationships' search interface. At the top, there's a 'Select Relationship type' dropdown set to 'Organizatio', a search box containing 'A\*', and buttons for 'Search', 'Select', 'Go Back', and 'Hide Filters'. Below this, the 'Search Results (84)' table is displayed with columns 'Name', 'Description', and 'Type'. The table lists several person records, each with a checkmark icon, a name, a description, and a type. To the right of the table is a 'Filters' panel with an 'Apply Filter' button. The 'Filters' panel has two sections: 'Party Type' with a checkbox for 'Person (84)', and 'Display Name' with a list of names and their counts, each with a checkbox. The 'Display Name' list includes: AARON BENNETT (1), ACTON MENDEZ (1), ADA HARDY (1), ADAM BOSH (1), ADAM GRAY (1), ADOLFO RAMILLO (1), ADRIENNE ADKINS (1), and AGNES BISHOP (1). At the bottom of the table, there are pagination controls showing '1' of 9 pages, a 'records per page' dropdown set to '10', and a status bar indicating '1 - 10 of 84 items'.

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:

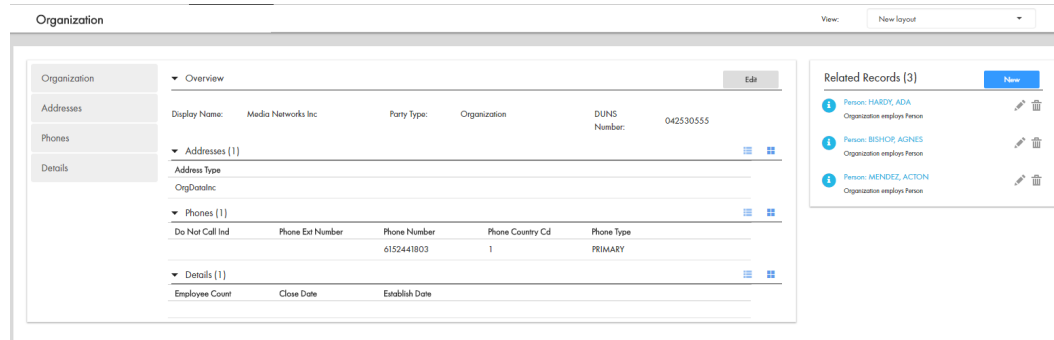
The screenshot shows the 'Relationships' search interface after applying filters. The 'Search Results (2)' table now only displays two records: 'Person: GRAY, ADA...' and 'Person: HARDY, ADA...'. The 'Filters' panel on the right is the same as in the previous screenshot, but the 'Apply Filter' button is now highlighted in blue. The 'Display Name' list shows that 'ADA HARDY (1)' and 'ADAM GRAY (1)' are now selected with blue checkmarks. The pagination controls at the bottom of the table show '1' of 1 page, a 'records per page' dropdown set to '10', and a status bar indicating '1 - 2 of 2 items'.

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:



## 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 of 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**.

Customer 360 marks the record as deleted and no longer displays the record, but does not remove the record from the database.

## Adding a Tag

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

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

All the tags are added to the customer.

## CHAPTER 7

# Managing Record Versions

This chapter includes the following topics:

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

## Managing Record Versions Overview

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

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

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

## Viewing Record Versions

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

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

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

## Comparing Record Versions

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

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

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

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

Change Type	Color
Add	Green
Update	Yellow
Delete	Red

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

The following table describes the predefined filters:

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

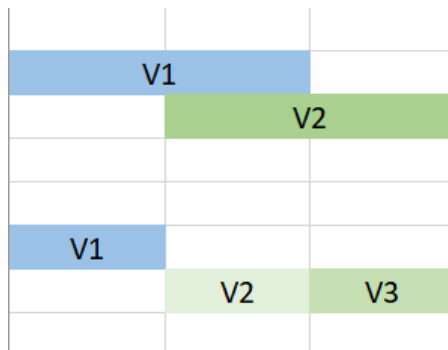
Predefined Filter	Description
Show Added	Shows only the fields that were added.
Show Edited	Shows only the fields that were updated.

## Adding Record Versions

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

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

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



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

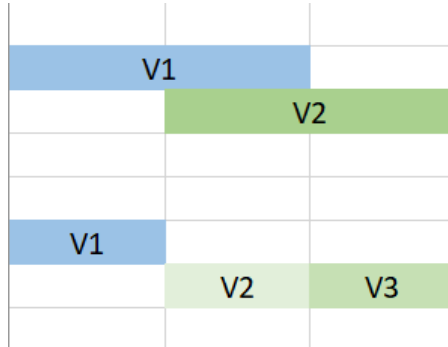


# Editing Record Versions

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

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

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



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

# Deleting Record Versions

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

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

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

## Setting the End Date or Time of Record Versions

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

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

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

## Investigating Data Changes in a Record Version

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

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

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

## Viewing Record Versions in the Timeline View

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

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

# Establishing the Best Version of the Truth for Record Versions

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

For more information about establishing the best version of the truth for record versions, see [GUID-678EF469-1E48-46B3-BC8B-195AD827480F](#).

## CHAPTER 8

# Importing Bulk Data

This chapter includes the following topics:

- [Import Bulk Data Overview, 61](#)
- [Import Bulk Records, 62](#)
- [Import Bulk Relationships, 62](#)
- [Update Records, 63](#)
- [Field Mapping, 63](#)
- [Preview Records, 65](#)
- [Importing Data, 66](#)
- [Trigger the New File Import Review Process, 69](#)
- [File Import Summary Report, 70](#)
- [Match New Records with Existing Records, 71](#)

## 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:

The screenshot shows the 'New File Import' window. At the top, there are tabs for 'Upload File', 'Map Fields', and 'Preview & Import'. The 'Upload File' tab is active, showing a table of data from a CSV file named 'Test CSV File.csv'. The table has five columns: Name, Last Name, Address, Phone Number, and SSN. Below the table, there is a 'File Properties' section with various settings for the import process.

Name	Last Name	Address	Phone Number	SSN
John	Smith	Toronto	656-876-8987	986-898-5632
Sean	Ateneo	London	416-252-6765	234-456-5764
Kai	Zhu	Hong Kong	343-876-3874	476-948-4009
James	Arthur	Sydney	986-888-9696	986-898-5632
Kerry	Dalton	New York	586-986-3758	986-896-5423

**File Properties**

The file import settings are populated based on the file you select to import. If you don't see the desired result in the preview, you can change the following settings.





Delimiter:    
Text Qualifier:    
Code Page:    
Import Data from Line:    
Column Header in Row 1:    
Regional Settings: ☒   
Date Pattern:    
Decimal Separator:    
Thousand 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 66](#)

# Import Bulk Relationships

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

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

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

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

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

## Update Records

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

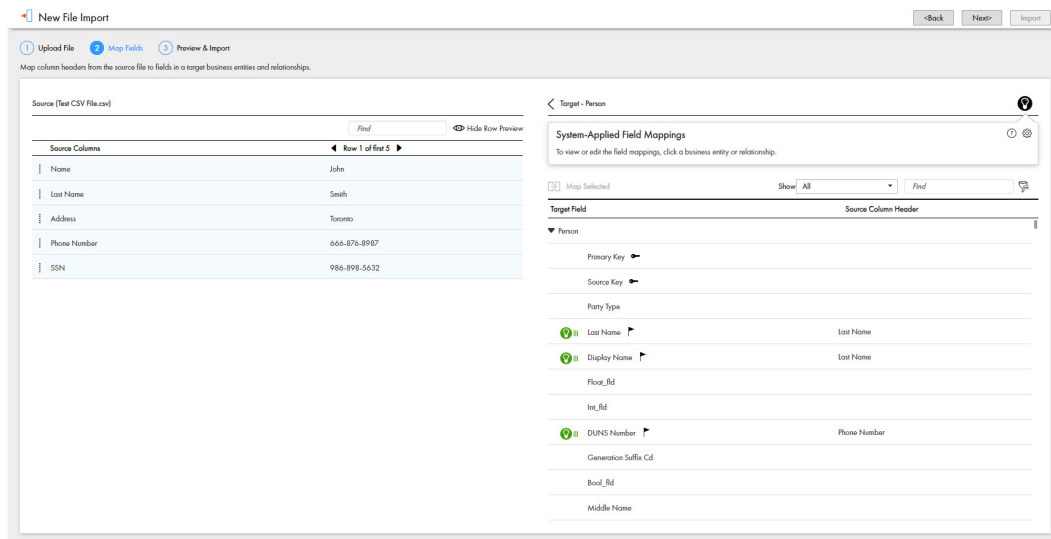
Before you import data to update parent records, add the row ID primary key or the source key in the source file. To update child records, add the parent row ID, child row ID or the child cross reference primary key in the source file. To update cross reference records, add the cross reference primary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

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

## Field Mapping




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

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



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

The following table describes the confidence icons:

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

## Setting Default Values

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

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

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

## Filtering Target Fields

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



The following table lists the filter options:

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

## Filtering Source Rows

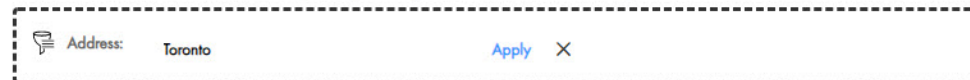
You can use the Filter Source Rows option to filter and manually map source rows to the target business entities or relationships. For example, the source file contains a CreditCard source row and you need to map this row to the correct target business entity. Drag and drop the CreditCard source row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

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

The **Filter Source Rows** box appears.

### 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 X

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

The source row appears in the Filter Source Rows box.

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

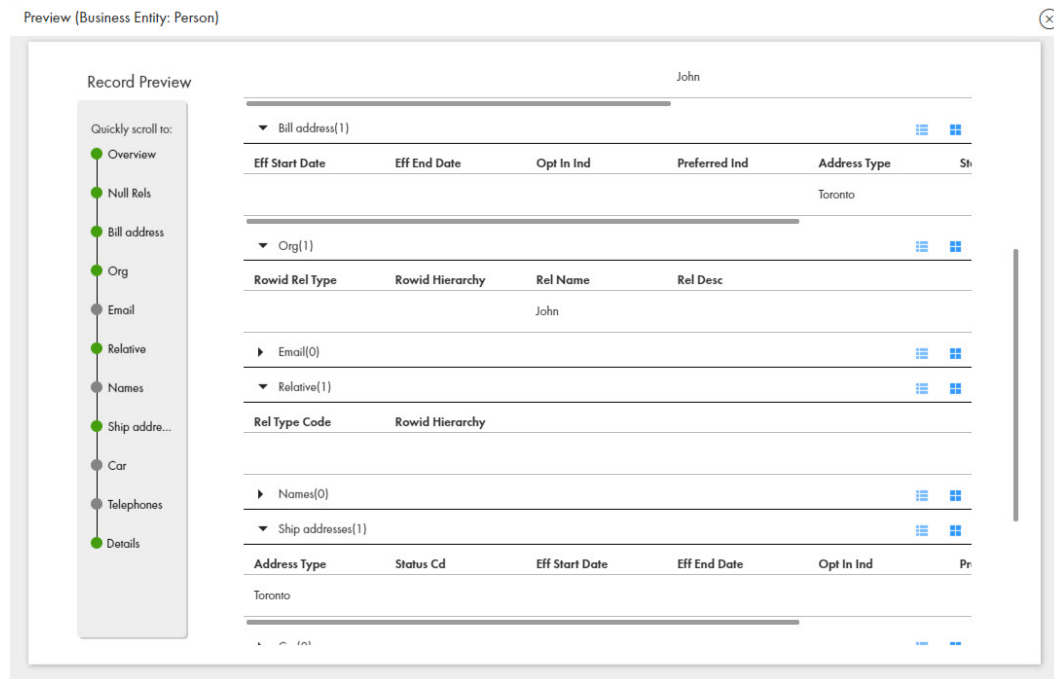
The target business entities appear based on the filter conditions you enter.

## Preview Records

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

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

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



## Importing Data

You can import data in bulk into 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 <a href="#">"Supported Date Patterns" on page 68</a> .
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	MMM d, yyyy
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, yyyy	d MMMM yyyy
M d, yy h:mm a		

## Trigger the New File Import Review Process

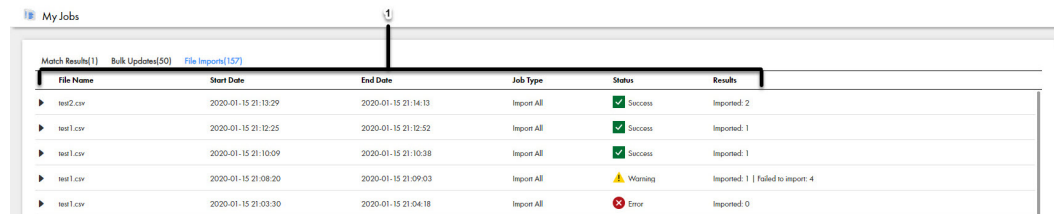
After you import a new file with bulk data, a review process triggers and saves the requested changes as pending records in the Task Manager. Your MDM administrator or a user with the correct privileges, such as, a manager, must claim and approve the pending records. You cannot edit records pending for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

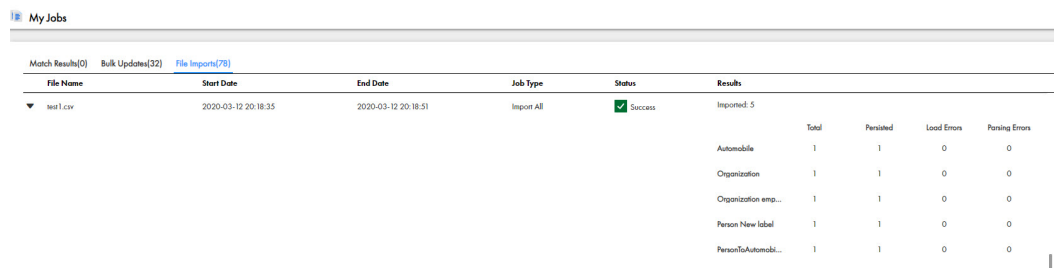


My Jobs					
Match Results(1) Bulk Updates(50) File Imports(157)					
File Name	Start Date	End Date	Job Type	Status	Results
test2.csv	2020-01-15 21:13:29	2020-01-15 21:14:13	Import All	Success	Imported: 2
test1.csv	2020-01-15 21:12:25	2020-01-15 21:12:52	Import All	Success	Imported: 1
test1.csv	2020-01-15 21:10:09	2020-01-15 21:10:38	Import All	Success	Imported: 1
test1.csv	2020-01-15 21:08:30	2020-01-15 21:09:03	Import All	Warning	Imported: 1   Failed to import: 4
test1.csv	2020-01-15 21:03:30	2020-01-15 21:04:18	Import All	Error	Imported: 0

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

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

The following image shows a sample import summary report:



My Jobs					
Match Results(0) Bulk Updates(32) File Imports(75)					
File Name	Start Date	End Date	Job Type	Status	Results
test1.csv	2020-03-12 20:18:35	2020-03-12 20:18:51	Import All	Success	Imported: 5
					Total Persisted Load Errors Parsing Errors
					Automobile 1 1 0 0
					Organization 1 1 0 0
					Organization emp... 1 1 0 0
					Person New label 1 1 0 0
					PersonToAutomobi... 1 1 0 0

The following table describes the elements of the Results field:

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

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

# Match New Records with Existing Records

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

## Match Rule Sets

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

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

## Matching Records

You can import data into 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 <a href="#">"Supported Date Patterns" on page 68</a> .
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

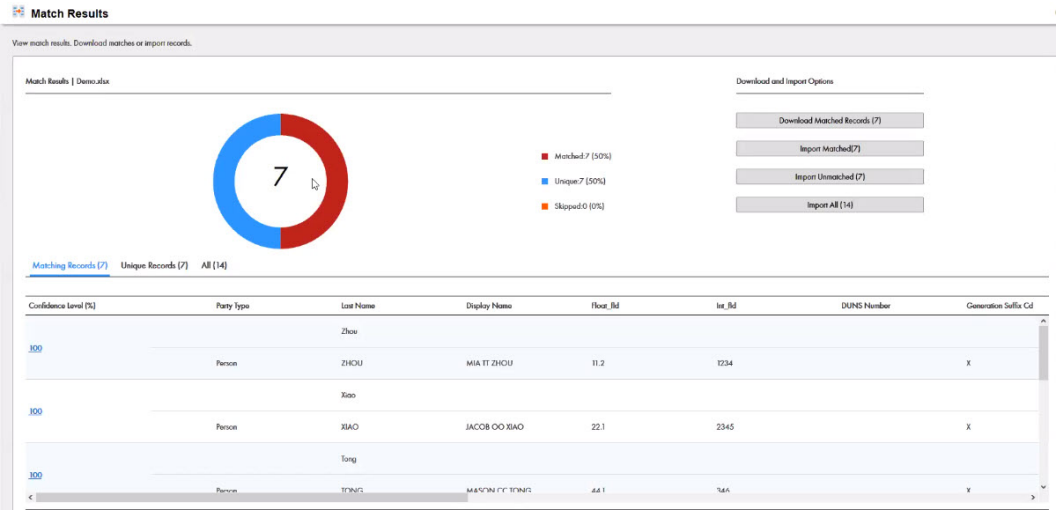
When you perform an ad hoc match, Data Director generates the match results that contain details of the matched, unique, skipped and all records. You can review the match results to determine whether to import the system suggested records.

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:



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

# Viewing Tasks

This chapter includes the following topics:

- [Tasks Overview, 74](#)
- [Task Manager, 74](#)
- [Potential Owners, 79](#)
- [Potential Task Actions, 80](#)
- [Finding Tasks, 80](#)

## 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.

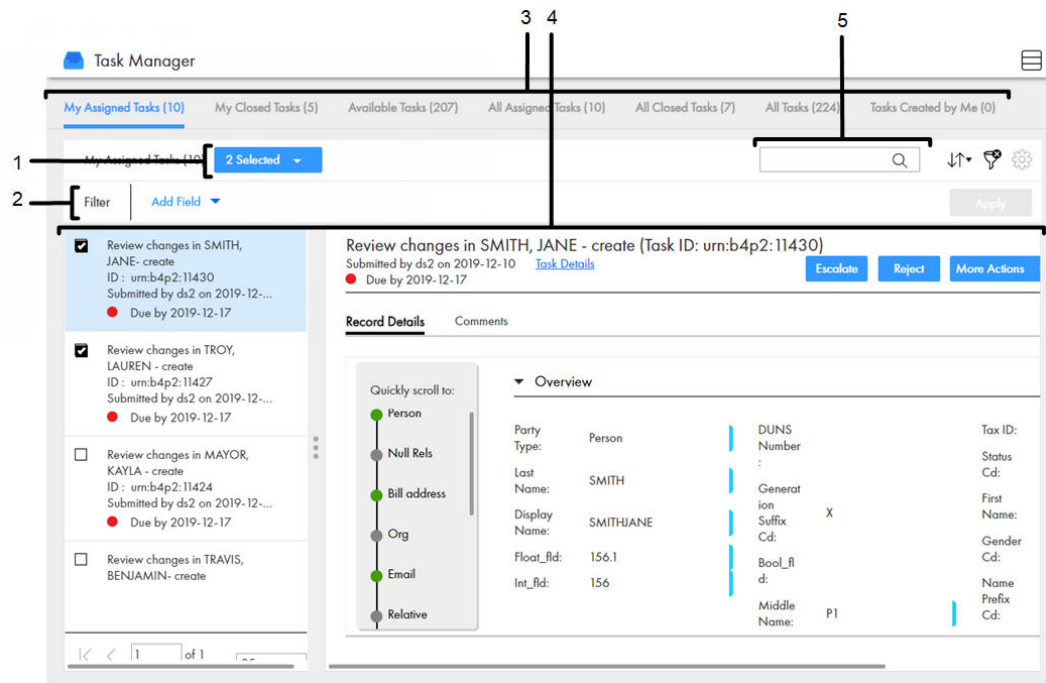
**Note:** If you require different task types, triggers, or workflows, contact your MDM administrator. The MDM administrator can edit your task configurations.

## 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 user interface elements of the Task Manager:

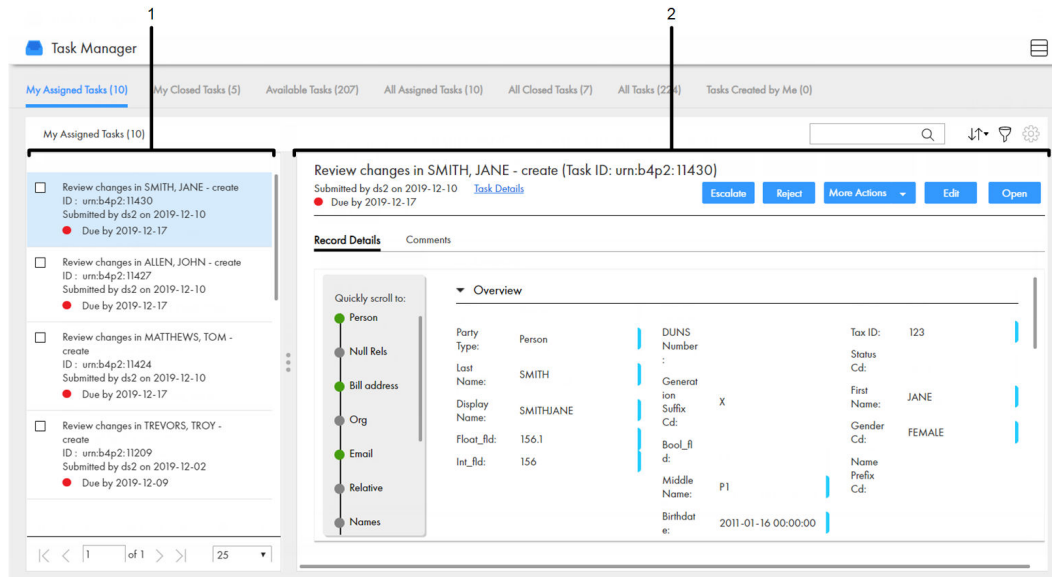
User Interface Element	Description
Selected list	<p>Performs task administration action on the selected tasks. To use the <b>Selected</b> list, select the check box beside multiple tasks.</p> <p>You can perform the following task administration actions:</p> <ul style="list-style-type: none"> <li>- Assign</li> <li>- Release</li> <li>- Edit</li> <li>- Claim</li> <li>- Task actions, such as Accept, Reject, or Disclaim</li> </ul> <p><b>Note:</b> The available task administration actions depend on your selected tasks and the ActiveVOS workflows.</p>
Custom filters	<p>Filters the tasks based on the filters that you select. To use custom filters, click the <b>Filters</b> icon, and then add filters.</p> <p>You can use any combination of the following filters:</p> <ul style="list-style-type: none"> <li>- Business Entity</li> <li>- Hierarchies</li> <li>- Creation Date</li> <li>- Due Date</li> <li>- Owner</li> <li>- Priority</li> <li>- Task Title</li> <li>- Task Type</li> </ul>

User Interface Element	Description
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	Shows tasks based on the predefined filter criteria for the tab. Use one of the following filters: <ul style="list-style-type: none"> <li>- My Assigned Tasks. Shows your open assigned tasks.</li> <li>- My Closed Tasks. Shows the tasks that you closed.</li> <li>- Available Tasks. Shows all unassigned tasks that are available to your user group.</li> <li>- All Assigned Tasks. Shows all the tasks that the users in your user group are assigned.</li> <li>- All Closed Tasks. Shows all the tasks that the users in your user group closed.</li> <li>- All Tasks. Shows all the closed, assigned, and unassigned tasks that are available to your user group.</li> <li>- Tasks Created by Me. Shows the tasks that you created.</li> </ul>
Search	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:



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.
Type	Name of a people activity within the process.
Priority	Priority of the task. The task priority can be Low, Normal, or High. When generating tasks, the review process assigns the same priority to all tasks of the same type.
Task Status and Due Date	<p>Status of the task and the date the task is due.</p> <p>Status of the task can be Open or Closed. When the task status is Open, you can view the record associated with the task.</p> <p>The review process calculates a default due date based on the task creation date plus a predefined time period.</p> <p>The due date of each task is prefixed with one of the following colored dots:</p> <ul style="list-style-type: none"><li>- Green. Indicates that the task is not overdue.</li><li>- Red. Indicates that the task is overdue.</li><li>- Amber. Indicates that the task will be overdue in the next 24 hours.</li></ul>
Owner	Name of the signed-in user.
ID	Instance ID of the review process that generated the task.
Submitted Date and Creator	Name of the user who created the task, and the date on which the user created the task.

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

## 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 describes the elements in the review panel:

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

## List View

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

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

Task Manager

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

My Assigned Tasks (10)

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

1 - 10 of 10 tasks

Tasks per page: 25

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

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

**Note:** If you 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 role or Senior 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 tasks are Unmerge, Cancel, and Disclaim. When you take an action on these tasks together, the potential task actions are Cancel and Disclaim.

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

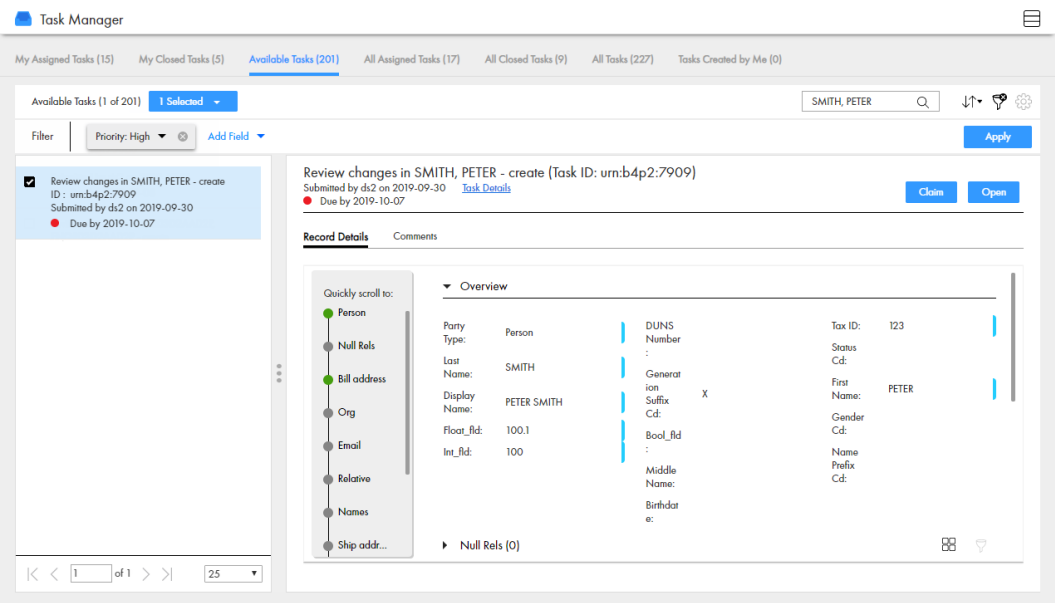
**Note:** If you and your colleagues require different user roles, task definitions, workflow triggers, or ActiveVOS workflows, contact your MDM administrator. The MDM administrator can change your configurations.

## 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:





**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.

## CHAPTER 10

# Participating in Review Processes

This chapter includes the following topics:

- [Participating in Review Processes Overview, 82](#)
- [Task Types Associated with Records, 83](#)
- [Task Types Associated with Hierarchies, 84](#)
- [Claiming a Task, 85](#)
- [Resolving a Task, 85](#)
- [Organizing Work on a Task, 93](#)

## Participating in Review Processes Overview

When a business user or portal user adds or changes customer data, the change triggers a review process. A review process is an automated business process that notifies business managers when changes are ready for review.

A business user can add or update data in Data Director. A portal user can use the Customer Portal to update the customer data.

The type of review process depends on the review workflow associated with the user. The review process might also vary based on the action you perform. For example, create, edit, merge, or unmerge task can trigger different workflows.

## Example of a Review Process for Edits

The staff in the Despatch department use Customer 360 to keep customer address information up to date.

In the Despatch department, each user credential includes one of the following user roles:

- Sales Operation Analyst. The user has permission to add and change records, but the changes must go through a review process before the master data is updated.
- Sales Operation Manager. A Sales Operation Manager is a type of manager with additional permissions. A Sales Operation Manager reviews changes and has the authority to approve them.

A Sales Operation Analyst edits the customer data as requested by the customer representative. The following steps describe what happens during the review process.

1. A Sales Operation Analyst changes the address information of the customer and saves the change. In the MDM Hub Store, the state of the customer 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 for managers. All users with the role of Sales Operation Manager receive a task notification in the task inbox with the task type of Approve.
4. A Sales Operation Manager claims the task. The task is assigned to the manager.
5. The Sales Operation Manager opens the customer record, reviews the edit, and agrees with the edit. The manager resolves the task by clicking Approve.
6. 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 address information in the customer record. The customer records change to the active state. The creator of the record receives a notification, when a record is approved or rejected.

## Task Types Associated with Records

By default, workflows are triggered when a user with the Sales Operation Analyst creates or updates a record. When a user with the Sales Operation Manager role creates or updates a record, no workflows are triggered.

The Data Director default configuration includes the following tasks:

Task Type	Description
DraftState	Created when a creator creates or updates a record and chooses to keep the change in draft state.
Notification	Created when an approver approves or rejects a record.
Update	Created when an approver sends back a record for resubmission.
FinalReview	Created when a creator sends a new record or an updated record for approval.

The following steps summarize what happens when a user with the Sales Operation Analyst role creates or updates a record and a user with the Sales Operation Manager role approves the record:

Task	Task Owner	Possible Actions	Result
DraftState	Creator	Submit	Record is submitted for approval. Record is assigned to users with Sales Operation Manager role.
		Discard	Record is deleted.
FinalReview	Approver	Claim	User claims the tasks. Record appears in the task inbox of the user.
		Disclaim	Record is assigned back to users with the Sales Operation Manager role.
		Approve	Record is promoted. Notification sent to the creator.

Task	Task Owner	Possible Actions	Result
		Reject	Record is deleted. Notification sent to the creator.
		Send Back	Record is sent back to the creator with comments.
Update	Creator	Submit for Approval	Record is resubmitted for approval. Moves to the FinalReview workflow.
		Cancel	Record is deleted.
Notification	Creator	OK	Close the workflow.

## Task Types Associated with Hierarchies

When a Sales Operation Manager updates the hierarchy of a record or organization, no workflow is triggered. The changes made are directly saved. When a Sales Operation Analyst makes changes related to the hierarchy of a record or organization, a one-step approval workflow is triggered.

The Customer 360 default configuration for hierarchy workflow includes the following tasks:

Task Type	Description
FinalReview	Created when a user make changes to the hierarchy of a record and sends the changes for approval.
UpdateReview	Created when an approver sends back the changes made to the hierarchy of a record for resubmission.
Notification	Created when an approver approves or rejects the changes made to the hierarchy of a record.

The following steps summarize what happens when a user with the Sales Operation Analyst role updates a hierarchy and a user with the Sales Operation Manager role approves or rejects the changes made:

Task	Task Owner	Possible Actions	Result
FinalReview	Approver	Claim	User claims the tasks. Hierarchy change appears in the task inbox of the user.
		Disclaim	The hierarchy change is assigned back to users with the Sales Operation Manager role.
		Approve	The hierarchy change is promoted. Notification is sent to the requestor.
		Reject	The hierarchy change is deleted. Notification is sent to the requestor.
		Send Back	The hierarchy change is sent back to the requestor with comments.

Task	Task Owner	Possible Actions	Result
UpdateReview	Requestor	Submit for Approval	The hierarchy change is resubmitted for approval. Moves to the FinalReview task.
		Cancel	The hierarchy change is deleted.
Notification	Requestor	OK	The workflow is closed.

## 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. Look for highlighted fields and decide if the edits are valid.
3. If you see a typographical error or an incorrect value for which you know the correct value, perform the following steps to edit the field:
  - a. Click **Edit**.
  - b. Make the changes as required, and then click **Save**.
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 agree with the edits and the task type permits you to approve changes, click <b>Approve</b> . The ActiveVOS Server marks the related Final Review people activity as completed and performs the next activity in the process.
Send Back	If you require more information to review the edits, click <b>Send Back</b> . Type an explanation in the Comment box.
Reject	If you disagree with the one or more edits, click <b>Reject</b> and type an explanation in the Comment box. The ActiveVOS Server notifies the person who edited the record.
<Other>	If you see other options in the menu, then your organization uses a custom business process. If the purpose of the option is not clear and your role permits access to the ActiveVOS console, you can open the process to understand the workflow. Otherwise, contact the person who created the business process.

The task is closed.

5. Confirm your action in the confirmation dialog box.
6. To change the ownership of the task without resolving the task, click an appropriate action button, or click **More Actions** and select one of the following actions:

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

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.

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

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

## Reviewing a New Record

When you open a task to review a new record, review all field values in the record that need to be validated.

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

- 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.
- Determine if the values in the record meet your business requirements.
- To make changes to the record data, perform the following steps:
  - Click **Edit**.
  - Make the changes as required, and then click **Save**.
- 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.
Send Back	If you require more information to review the edits, click <b>Send Back</b> . Type an explanation in the Comment box.
Reject	If you disagree with the one or more edits, click <b>Reject</b> and type an explanation in the Comment box. The ActiveVOS Server notifies the person who edited the record.
<Other>	If you see other options in the menu, then your organization uses a custom business process. If the purpose of the option is not clear and your role permits access to the ActiveVOS console, you can open the process to understand the workflow. Otherwise, contact the person who created the business process.

The task is closed.

- Confirm your action in the confirmation dialog box.

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

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

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

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

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

## Resolving a Record Sent Back for Updates

If an approver sends back a record, the creator receives the task in the task inbox of the **Home** page. As a creator, you can open the task, check the comments, work on the record, and send the record for reapproval.

- In the task inbox of the **Home** page, select the task.

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

- Click **Task Details**, and read the comments.
- Click **Edit**, make changes as required, and then click **Save**.
- To resolve the task, select one of the following actions:

Action	Description
Submit for Approval	Submits the updated record for approval.
Cancel	Deletes the record.

- Confirm your action.

The task is closed.

## Closing a Notification Task

When an approver approves or rejects a record, the process triggers a notification task workflow for the creator of the task. If you created or updated a record and sent it for approval, you get the notification in your task inbox.

- In the task inbox of the **Home** page, click the notification task.



2. Click **OK**.  
The task is closed.

## 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.
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.	From the <b>Actions</b> menu, select an option: <ul style="list-style-type: none"><li>- <b>Remove Candidate</b>. Removes a manually added record from the review panel.</li><li>- <b>Not a Match</b>. Removes a system matched record from the review panel and dissociates it as a match of the target record.</li></ul>
Finalize the best version of the truth.	Select the field with the correct value or enter the correct value in the <b>Merge Preview</b> column.

- b. Click **Update**.  
The merge task is updated.
5. To resolve the task, select one of the following actions:  
The task is closed.

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

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

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

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

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

## Reviewing an Unmerge Task

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

1. 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.
4. 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.

Action	Description
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.
<Other>	If you see other options in the menu, then your organization uses a custom business process. If the purpose of the option is not clear and your role permits access to the ActiveVOS console, you can open the process to understand the workflow. Otherwise, contact the person who created the business process.

The task is closed.

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

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

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

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

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

## 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.

- 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.

- Optionally, review the task details, comments, attachments.
  - Click the **Comments** tab, and then review the comments.
  - Click **Task Details**.
  - Review the details of the task, such as the priority and due date.
  - Download attachments in the **File Attachments** section.
  - Click **Cancel**.
- 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> .

Option	Description
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 a Task

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 tasks that you can work on at a later date. You can edit the task properties to better reflect the urgency within the business to resolve tasks.

### 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:

×

Edit Task: Send for Approval

Task Title

Send for Approval

Priority

Normal

Due Date

2017/09/05

Task Type

Final Review

Assign to

Admin

Business Entity

File Attachment

File Name	Creator	Uploaded
Onboarding.pdf	jthomas	Jan 1, 2017
Bank Statment.pdf	ahasdj	

Browse

Upload

Add Comment

Type Comment

All Comments(1)

admin added a comment - 29/Aug/2017 16:10:37

Created task "Send for Approval"

Save

Cancel

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. <b>Note:</b> The <b>File Attachment</b> field is available only if the task supports attachments.
Add Comment	Add comments to explain edits to the task properties and to track questions and answers about the task. Comments appear in the <b>Comments</b> tab.
Assign Back to Pool	Return the task to the pool of unassigned tasks so that other users can claim the task. <b>Note:</b> The <b>Assign Back to Pool</b> button is available only if the task belongs to another user.

5. Click **Save**.

## Assigning Your Task to Another User

If the business process management supports reassignment, you can assign tasks to other users. To find out if task assignments can be done, open the **Task Details** dialog box and see if the **Assignee** list is enabled.

1. Click **Task Manager**.  
The task panel contains a list of tasks.
2. Select **My Assigned Tasks**.  
The task panel lists your assigned tasks.
3. In the task panel, select the task that you want to assign to another user.  
The record appears in the review panel.
4. To provide additional information about the task, click **Task Details**, and then add a comment or a file attachment.  
**Note:** If you do not have the options for comments or attachments, contact your MDM administrator to request that they enable comments and attachments.
5. To assign the task, select the user from the **Assignee** list.
6. Click **Save**.

## Assigning a Task Back to the Pool

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

1. Click **Task Manager**.  
The task panel contains a list of tasks.
2. In the task panel, select the task that you want to send to the pool.  
The record appears in the review panel
3. In the review panel, click **Task Details**.
4. Click **Assign Back to Pool**.

## Disclaiming a Task

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

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

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

# CHAPTER 11

## Managing Tasks

This chapter includes the following topics:

- [Managing Tasks Overview, 96](#)
- [Claiming Tasks, 97](#)
- [Resolving Tasks, 97](#)
- [Organizing Work on Tasks, 103](#)

### 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.

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

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



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

## Claiming Tasks

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

1. Click **Task Manager**.  
The task panel contains a list of tasks.
2. Click **Available Tasks**.  
The task panel lists all the unassigned tasks for your user group.
3. Optionally, to find tasks to manage, use custom filters or search.
  - 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 80](#).
4. Select a task and review the task details, comments, and attachments.
  - a. Click the **Comments** tab, and then review the comments.
  - b. Click **Task Details**.
  - c. Review the details of the task, such as the priority and due date.
  - d. Download attachments in the **File Attachments** section.
  - e. Click **Cancel**.
5. Repeat step 4 to find additional tasks that you want to claim.
6. Select the check box beside the tasks that you want to manage.  
The **Selected** list appears.
7. From the **Selected** list, select **Claim**.

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

## Resolving Tasks

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

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

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

## Reviewing Edited Records

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

Before you begin, claim the tasks that you want to work on.

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 80](#).

4. Select a task and review the edited record in the review panel.

- a. Look for highlighted fields and decide if the edits are valid.
- b. If you see a typographical error or an incorrect value for which you know the correct value, click **Edit**, and edit the field.

5. Repeat step 4 for each edited record that you want to review.

6. Select the check box beside the tasks for which you want to take an action.

For example, you select the check box beside the tasks with edits that you want to approve.

The **Selected** list appears.

7. From the **Selected** list, click **More Actions...**

The **More Actions...** dialog box appears.

8. To resolve the tasks, select one of the following actions:

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

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

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

The tasks are closed.

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 [“Potential Task Actions” on page 80](#).

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 80](#).

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.
6. Select the check box beside the tasks for which you want to take an action.  
For example, you select the check box beside the tasks for new records that you want to approve.  
The **Selected** list appears.
7. From the **Selected** list, click **More Actions...**.  
The **More Actions...** dialog box appears.
8. To resolve the tasks, select one of the following actions:

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

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

The tasks are closed.

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

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 [“Potential Task Actions” on page 80](#).

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 80](#).

4. Select a merge task, and then review the merge task and determine if the merge is valid. The fields that appear in the merge preview are highlighted.

5. If required, make changes to the proposed merge task.

- a. To change the proposed merge task, perform any of the following tasks:

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

- b. Click **Update**.

The merge task is updated.

6. Repeat steps [4](#) through [5](#) for each merge task that you want to review.
7. Select the check box beside the tasks for which you want to take an action.  
For example, you select the check box beside the merge tasks that you want to approve.  
The **Selected** list appears.

8. From the **Selected** list, click **More Actions...**

The **More Actions...** dialog box appears.

9. To resolve the tasks, select one of the following actions:

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

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 [“Potential Task Actions” on page 80](#).

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 80](#).

4. Select an unmerge task, and then review the unmerge preview and determine if the unmerge is warranted. The fields that appear in the preview are highlighted.

5. Repeat step [4](#) for each unmerge task that you want to review.

6. Select the check box beside the tasks for which you want to take an action.

For example, you select the check box beside the unmerge tasks that you want to approve.

The **Selected** list appears.

7. From the **Selected** list, click **More Actions....**

The **More Actions...** dialog box appears.

8. To resolve the tasks, select one of the following actions:

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

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

The tasks are closed.

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

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 [“Potential Task Actions” on page 80](#).

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 80](#).

4. Select the check box beside the tasks that you want to manage.

The **Selected** list appears.

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

The **Assign** dialog box appears.

6. From the **Assignee** list, select a user who you want to assign the tasks.

**Note:** The **Assignee** list contains the potential owners shared by all selected tasks. For more information, see ["Potential Owners" on page 79](#).

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 80](#).

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 79](#).

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 80](#).

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.

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

The task panel lists your assigned tasks.

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

The task panel lists all available tasks.

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

- 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 80](#).

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

The **Edit** dialog box appears.

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

Field	Description
Task Title	Enter a title that is more meaningful to you. A good title includes at least the name of the record and the change that initiated the review.
Priority	Select a priority that reflects the urgency within the business to resolve this change.
Due Date	Select a due date that reflects the urgency within the business to resolve the change.
Assignee	Reassign this task to someone else. <b>Note:</b> Only potential owners shared by all the selected tasks appear. For more information, see <a href="#">“Potential Owners” on page 79</a> .
File Attachment	Attach files to provide additional information about the task. Attachments appear in the <b>Task Details</b> dialog box. <b>Note:</b> The <b>File Attachment</b> field is available only if the task supports attachments.
Add Comment	Add comments to explain edits to the task properties and to track questions and answers about the task. Comments appear in the <b>Comments</b> tab.

7. Click **Save**.

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

## CHAPTER 12

# Resolving Duplicates

This chapter includes the following topics:

- [Resolving Duplicates Overview, 107](#)
- [Scenario for Duplicate Records, 108](#)
- [Resolving Duplicate Records, 109](#)
- [Resolving Duplicate Child Records within a Record, 111](#)

## Resolving Duplicates Overview

The match process identifies matching records based on match rules. When you open the **Matching Records** view for a record, Customer 360 retrieves data about the matching records from the matches table. You can also search for other similar records and add them to the view.

In the **Matching Records** view, you can review the records in the similar records. You start with the parent records. If you identify duplicate records based on the data in the parent records, select the records. The merge preview for the parent record shows you the results of the proposed merge. Next, you can compare all the child and descendant records of the selected records. If some of the records contain different values for the same field, the merge preview process refers to the trust score for the data. The most trustworthy data is used in the merged record. At any time, you can open a preview of the merged record.

When you are sure that the merge preview reflects the best version of the truth, start the merge process. If your user role requires that someone else review the proposed merge record, Customer 360 saves the record and starts a merge review workflow. When an authorized person approves the proposed merge, the MDM Hub updates the master data to reflect the merged record.

## Match Process

The match process uses match rules to identify the records that are similar to the record that you opened in the **Business Entity** view. The degree of similarity among the records depends on how the match rules are defined.

The MDM Hub Administrator or a Data Steward defines the match rules in the Hub Console. Match rules identify the record columns to search and the type of match to use, that is, fuzzy or exact. For more information about match rules, see the *Multidomain MDM Configuration Guide*.

This list of similar records is only a starting point. Records can be similar, without being duplicate records. You must review the similar records and identify the duplicates.

## Merge Process

To resolve duplicate records, you merge a target record with the duplicate records. The merge process creates a record that contains the most trustworthy data from all the participating records.

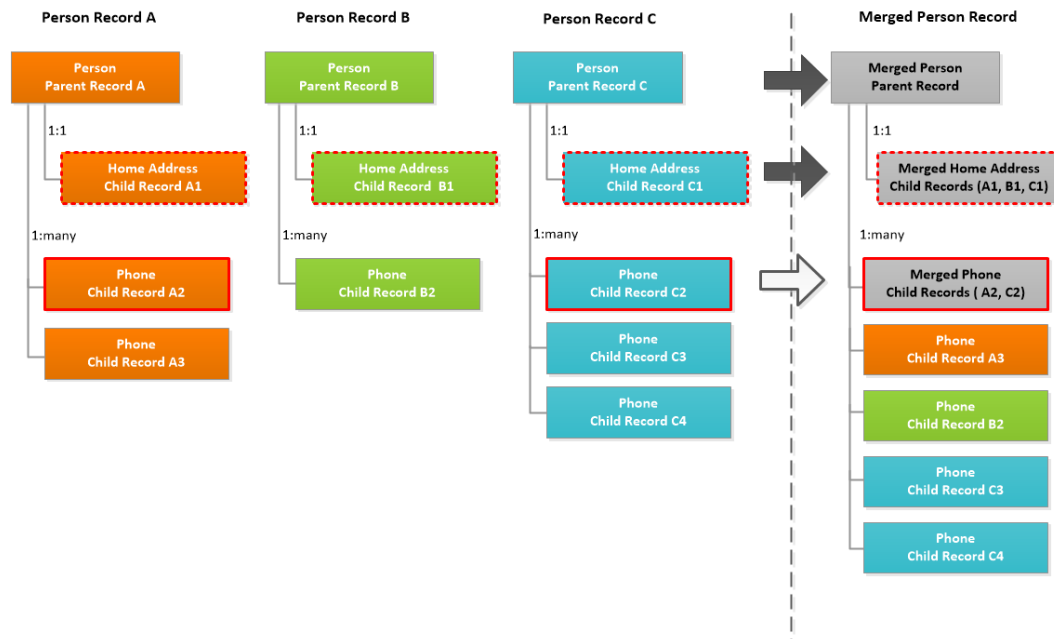
At the parent level, the merge process merges the data of the parent record.

At the child level, when the parent-to-child relationship is a one-to-one relationship, the merge process merges the child records. When the relationship is a one-to-many relationship, you can select the child records to merge from the **Matching Records** view. All records that are not selected for a merge are added to the merged record.

**Note:** Developers define the parent-to-child relationships when they define the structure of the business entity.

After the merge process handles a child record, it tries to merge each level of descendant records using the same merge strategies. The merge process must run successfully on a level before the process can try to merge the next level.

The following image shows how the merge process works on three records, where each record has a parent record and two child-level relationships:



The merged record contains the merged parent record, the merged child records, and all the records that were not 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** bar.

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** bar, 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 record 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 compare similar records. When you identify records that are duplicates, you can resolve the duplicates by merging the records.

To identify and resolve duplicate records, perform the following tasks:

1. [“Identifying Duplicate Records” on page 109](#)  
Review the suggested similar records and, optionally, find other records that you think might be matches. Select duplicates.
2. [“Identifying Duplicate Child Records” on page 110](#)  
After you select duplicate records, the **Navigate** menu updates to include the child records and descendant records from the duplicate records. Review the child records. Select duplicates.
3. [“Merging Duplicate Records” on page 111](#)  
Start the merge process.

## Identifying Duplicate Records

Compare the data in a target record with similar records in the **Matching Records** view. Start with the parent record, then use the Navigate menu to open the child records and their descendant records.

Initially, the Navigate menu reflects the structure of the target record. After you select duplicate records, the merge preview shows the result of merging the parent records of the target and duplicate records. The merge preview process applies the merge cascade rules to the child records and descendant records. The structure in the Navigate menu changes to reflect the structure of the proposed merged record.

1. With a record open, select **Matching Records**.  
The **Matching Records** view opens with the target record in the second column. The first column contains the **Merge preview**. The remaining columns contain the records that satisfy a match rule that is associated with the records of the target record. The row labels in the grid correspond to the column names in the parent record.
2. Optionally, show only the records that satisfied 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.

**Tip:** If the list is empty, the records of the target record have no match rules.

3. If you think that the match process missed a similar record, you can add it.
  - a. Click **Add**.  
The **Find and select entities** page opens.
  - b. Type the text or value that you want to find, and click **Search**.  
The search returns all records that contain the search term.
  - c. Optionally, select filters to restrict the search results and click **Apply Filter**.
  - d. Expand the details for a record by clicking the plus icon beside the name.
  - e. Select the records that you want to add.
  - f. Click **Select**.  
The records appear in the **Matching Records** view. If a record is already displayed in the view, it is not added again.
4. Compare the data in the parent records across all the similar records.
5. Optionally, to change the fields displayed for each record, click the **View** button.  
For example, you can show or hide the system columns.
6. When you determine that a record is a duplicate of the target record, select the check box in the column header for that record. You can select more than one record.  
The **Merge preview** shows the result of merging the parent records.
7. Click **Preview**.  
The **Business Entity Preview** opens. The preview shows the result of merging the records that belong to the target and duplicate records.
8. To close the preview, click **Back**.  
You return to the **Matching Records** view.

## Identifying Duplicate Child Records

After you preview the merge of duplicate records, review the child records and their descendant records in the **Matching Records** view. Select a record from the target record. You can select one or more duplicate records to merge with the target record.

**Note:** As you work with the child records, you might find data that makes you decide that a record is not a duplicate after all. You can return to the Overview screen and clear the check box for that record. The merge preview process regenerates the Merge Preview. The merge preview process keeps any manual merges that you created among the records in the remaining records. If a manual merge contained records from the removed record, those records are removed from the manual merge.

1. In the **Navigate** tab, expand a node and select a child record from the target record.  
The grid changes. The second column contains the selected child record, which is the target record. The remaining columns display the sibling records.  
**Tip:** If a pending icon appears in the column header for the target record, the record is in the pending state and cannot participate in a merge process. Select a different record as the target record.  
For example, you might see multiple telephone numbers for the target record plus all the telephone numbers that belong to the duplicate records.
2. If you see a sibling record that is a duplicate of the target record, select the check box in the column header. You can select more than one record.  
**Tip:** If a pending icon is shown instead of the check box, the record is in the pending state and cannot be selected for a merge.

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

3. Repeat the process on the remaining child records. Optionally, you can perform the same process on descendant records.
4. Click **Merge**.
5. 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 select duplicate child records and descendant records for manual merges in the **Matching Records** view, start the merge process.

1. In the **Navigate** tab, click **Overview**.  
You can see the parent records in the view.
2. Optionally, preview the proposed merged record.
  - a. Click **Preview**.
  - b. Review the proposed merged record. The **Preview** is similar to the **Business Entity** view.
  - c. Click **Back**.
3. Click **Merge**.

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

- If your user role permits you to merge records without a review, the merge process merges the records in the selected records. The merged records are in the active state.
- If your user role requires a review process, the merge process starts the merge review workflow. The records that will participate in the merge remain in the active state, but the merge occurs only after the merge proposal is approved.

### RELATED TOPICS:

- [“Merge Process” on page 108](#)
- [“Identifying Duplicate Records” on page 109](#)

## Resolving Duplicate Child Records within a Record

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

1. With the record open, select **Matching Records** from the View list.  
In the grid, the second column contains the selected record. In this scenario, ignore any similar records.
2. In the **Navigate** tab, expand a node and select a child record from the record.  
The grid changes. The second column contains the selected child record, which is the target child record. The remaining columns contain the sibling child records, if any.
3. If you see a sibling record that is a duplicate of the target child record, select the check box in the column header. You can select more than one child record.

The **Merge Preview** column shows the result of merging the target child record with the duplicate child records. The merge request is saved in an internal change list.

4. Repeat the process on the remaining child records. Optionally, you can perform the same process on descendant records.
5. In the **Navigate** tab, click **Overview** to return to the parent record.
6. Click **Merge**, and then confirm the merge.

The merge process implements the manual merge requests on the sibling child records. Based on your user role, one of the following actions occurs:

- If your user role permits you to merge records without a review, the merge process merges the child records. The merged child records are in the active state.
- If your user role requires a review process, the merge process initiates the merge review workflow. The child records that participate in the merge remain in the active state, but the merge occurs only after the merge proposal is approved.



## CHAPTER 13

# Investigating Data Changes

This chapter includes the following topics:

- [Overview, 113](#)
- [Scenario for Data Changes in History View, 113](#)
- [Comparing Data Changes in the History View, 114](#)

## Overview

You can compare the best version of the truth at different moments in time for a particular record. If you suspect that the data in the record 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. You can view the data that existed in the record 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 Data Changes in History View

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. 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.

# Comparing Data Changes in the History View

Use the History view to compare changes to master data.

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

SMITH,JOHN View: History

> History

From: 2016-01-01 03:00 To: 2016-10-05 15:52 Options

▼ 2017-01-01 03:00 AM

Oct 5, 2016 3:52:04 PM  
Details  
Updated by: admin

Oct 5, 2016 3:51:40 PM  
Details  
Updated by: admin

Oct 5, 2016 3:52:04 PM  
Email  
Updated by: admin

Oct 5, 2016 3:51:40 PM  
Email

Email Oct 5, 2016 Base object event

	Before	After
Consolidation Ind:	4	4
Created by:	admin	admin
Updated By:	admin	admin
Last updated on:	2016-10-05T12:51:40.903-07...	2016-10-05T12:52:04.802...
Last Rowid System:	SY50	SY50
Hub State Ind:	1	1
Rowid Object:	140881	140881
Created on:	2016-10-05T12:50:55.819-07...	2016-10-05T12:50:55.819...
Electronic Address:	jsmith@example.com	jxsmith@example.com

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 Xavier

SMITH,JOHN View: History

> History

From: 2016-01-01 03:00 To: 2016-10-05 15:52 Options

▼ 2017-01-01 03:00 AM

Oct 5, 2016 3:52:04 PM  
Details  
Updated by: admin

Oct 5, 2016 3:51:40 PM  
Details  
Updated by: admin

Oct 5, 2016 3:52:04 PM  
Email  
Updated by: admin

Oct 5, 2016 3:51:40 PM  
Email

Email Oct 5, 2016 Base object event

	Before	After
Consolidation Ind:	4	4
Created by:	admin	admin
Updated By:	admin	admin
Last updated on:	2016-10-05T12:51:40.903-07...	2016-10-05T12:52:04.802...
Last Rowid System:	SY50	SY50
Hub State Ind:	1	1
Rowid Object:	140881	140881
Created on:	2016-10-05T12:50:55.819-07...	2016-10-05T12:50:55.819...
Electronic Address:	jsmith@example.com	jxsmith88@example.com

Smith.

## CHAPTER 14

# Investigating Relationships

This chapter includes the following topics:

- [Investigating Relationships Overview, 115](#)
- [User Interfaces, 115](#)
- [Managing Hierarchy Relationships, 118](#)
- [Managing Network Relationships, 123](#)

## Investigating Relationships Overview

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

## User Interfaces

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

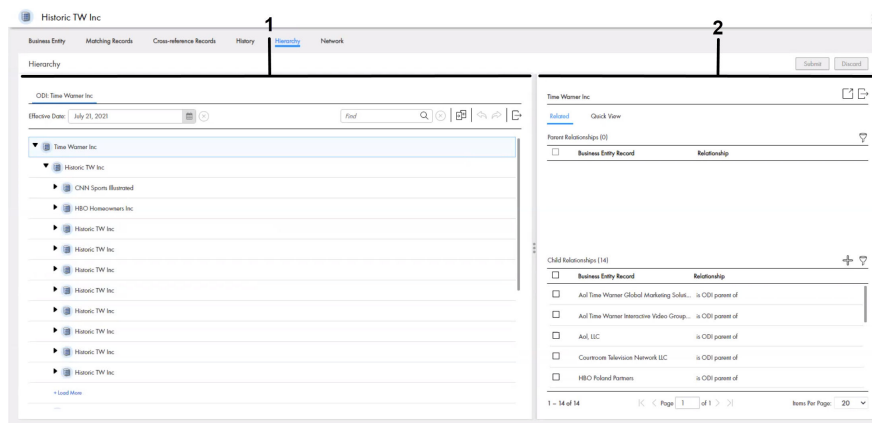
### Hierarchy View

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

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

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

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



1. Hierarchy panel
2. Relationship panel

## Hierarchy Panel

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

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

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

## Relationship Panel

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

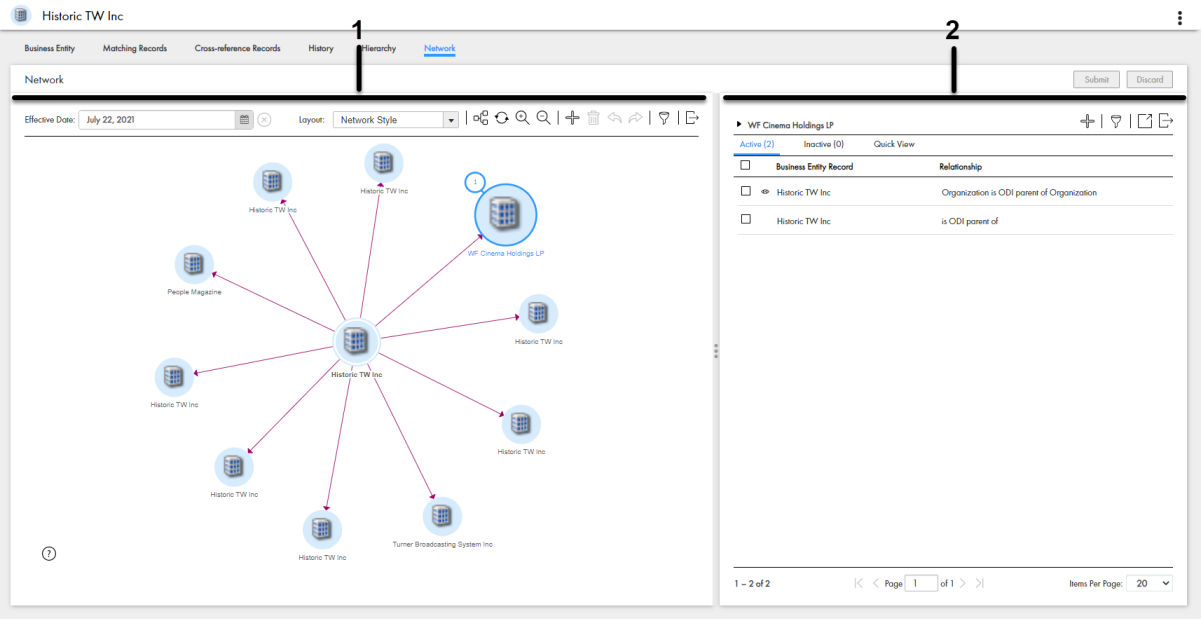
User Interface Element	Description
Related tab	Shows the parent and child relationships for the open record based on the selected hierarchy tab.
Quick View tab	Optional. Shows a condensed summary of the record details for the open record. <b>Note:</b> Your MDM administrator configures the <b>Quick View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

## Network View

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

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

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



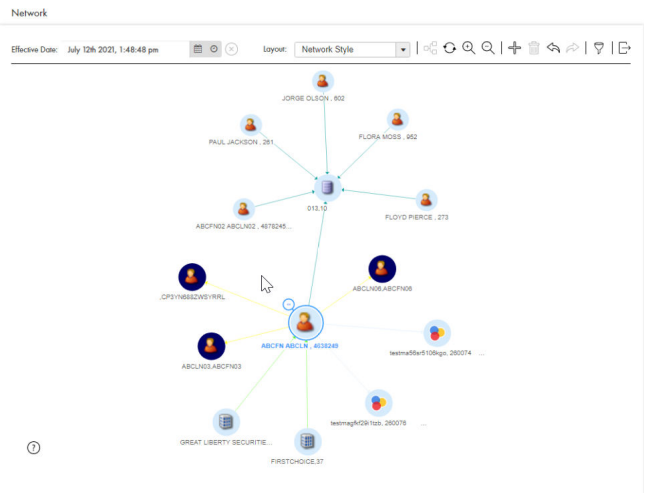
1. Network panel
2. Relationship panel

### 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:



## Opening a Record in the Hierarchy View

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

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

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

## Viewing Records and Relationships in a Hierarchy

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

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

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

## Adding a 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 [“Submitting Hierarchy Changes” on page 121](#).

## 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 120](#).

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

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

When you are done editing the hierarchy, you submit your changes for approval. For more information, see [“Submitting Hierarchy Changes” on page 121](#).

## Editing the Relationship Properties of a Hierarchy Relationship

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

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

The **Edit Relationship** panel opens.

2. Optionally, edit the relationship fields.

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

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

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

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

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

## Comparing with Effective Date or History Date

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

1. In the **Hierarchy** view, click the **Compare** icon.

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

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



The following table explains the highlights:

Highlight	Indicates
Green	New relationship
Yellow	Edited relationship
Red	Deleted relationship

## Viewing Records from the Hierarchy View

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

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

## Exporting a Hierarchy

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

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

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

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

3. Save the CSV file.

## Submitting Hierarchy Changes

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

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

The following table explains the highlights:

Highlight	Indicates
Green	New relationship
Yellow	Edited relationship
Red	Deleted relationship

3. Click **Accept**.

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

## Managing Multiple Hierarchy Relationships

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

### Editing Multiple Hierarchy Relationships

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

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

The **Submit Hierarchy Changes** window appears.

6. Click **Accept**.

### Deleting Multiple Hierarchy Relationships

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

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

The **Submit Hierarchy Changes** window appears.

4. Click **Accept**.

### Moving Multiple Records

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

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

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

## Managing Network Relationships

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

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

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

### Opening a Record in the Network View

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

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

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

### Viewing Records and Relationships in the Network

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

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

Use one of the following values:

- **Network.** Displays the relationships in a connected graph. Default is **Network**.
  - **Hierarchy.** Displays the relationships in a tree graph.
3. To filter the business entities or relationships in the network graph, click the **Filter** icon, and then add filters.
  4. To filter the relationships, in the **Active** tab, click the **Filter** icon, and then add filters.
  5. To view relationships in the network for an effective date, in the **Effective Date** field, select a date.
  6. To hide relationships in the canvas, in the **Active** tab, hover over a row, click the **More Actions** icon, and then click **Hide on Canvas**.
- The relationship is hidden in the canvas, and the **Shown on Canvas** icon disappears in the row.
7. To show relationships in the canvas, in the **Active** tab, hover over a row, click the **More Actions** icon, and then click **Show on Canvas**.
- The relationship appears in the canvas, and the **Shown on Canvas** icon appears in the row.
8. To filter records shown on the canvas, in the relationship panel, click **Add Field**, and then select the filter. You can filter by business entity, relationship, or node visibility. You can also use up to three filters.

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

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

## Adding a Network Relationship to a Record

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

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

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

**Tip:** To select multiple records, press **Ctrl** and select records.
4. Optionally, define the attributes of the relationship.
5. Click **Save**.

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

## Adding a Record to the Network

Add a related record to the network.

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

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

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

Next, create a network relationship to the record.

## Creating a Relationship between Records in the Network

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

1. In the **Network** view, hover over a node, and then click the **Arrow** icon.
2. Drag and release the arrow on a record node to which you want to create a relationship.  
The **Edit Relationship** panel opens.
3. Optionally, if there are relationship fields, specify the relationship attributes.
4. Optionally, if timeline is enabled, configure the start date or end date.

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

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

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

## Deleting a Network Relationship

Delete a network relationship that you no longer need.

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

## Editing the Relationship Properties of a Network Relationship

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

1. In the **Network** view, to edit the properties of a relationship, select a node in the canvas.
2. In the relationships panel, hover over a relationship, click the **More Actions** icon, and then select **Edit**.  
The **Edit Relationship** panel opens.
3. Optionally, edit the relationship fields.  
**Note:** Your MDM administrator configures the available relationship fields for the relationship. Contact your MDM administrator to change the fields.
4. Optionally, edit the start date or end date of the relationship.
5. Click **Apply**.

## Opening Related Records from the Network View

You can open a record to view the details of the record.

- To open a record, in the relationship panel, perform any of the following actions:
  - Select a record, and then click the **Open** icon.

- Hover over the record, click the **More Actions** icon, and then select **Open**.

## Exporting a Network

Export an image of the network.

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

1. In the **Network** view, click the **Export Graph** icon.
2. Save the PNG file.

## Managing Multiple Network Relationships

Manage multiple network relationships in the relationship panel. You can edit and delete multiple relationships, and move multiple relationships from one node to another.

### Editing Multiple Network Relationships

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

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

### Deleting Multiple Network Relationships

You can delete multiple network relationships that you no longer need.

1. In the relationship panel, select the records that you want to delete.
2. Hover over one of the selected records, click the **More Actions** icon, and then select **Delete**.
3. Click **Submit**.  
The **Change Network Summary** window appears.
4. Click **Accept**.

### Moving Multiple Records

You can move multiple network relationships from one node to another.

**Note:** You cannot move hidden relationships in the network panel.

1. In the relationship panel, select the records that you want to move.
2. Hover over one of the selected records, click the **More Actions** icon, and then select **Move to**.
3. In the **Move to** field, select the **More Actions** icon.  
The **Add Related Record** window appears.

4. Search for the target business entity, and then click **Select**.
5. In the **Existing Related Records** field, select **End relationships** or **Delete relationships**.
6. Click **Apply**.
7. Edit the properties that you want to change.
8. Click **Apply**.
9. Click **Submit**.  
The **Change Network Summary** window appears.
10. Click **Accept**.

## CHAPTER 15

# Creating Customer Profiles on the Customer Portal

This chapter includes the following topics:

- [Customer Portal Overview, 128](#)
- [Customer Portal Onboarding, 129](#)
- [Customer Onboarding Status, 129](#)

## Customer Portal Overview

Use the Customer Portal to add organization record through the online portal. Customers use the Customer Portal to initiate a relationship with your organization. Customers can register and fill out an online application form on the Customer Portal. After the business users in your organization approve a customer application, the customer can use the Customer Portal to upload documents, update information, and communicate with your organization.

**Note:** As a business user, you do not use the Customer Portal, but it is helpful to understand the Customer Portal experience from a customer perspective.

## The Customer Perspective

You are a representative of a restaurant called ABC Restaurant. You need to buy beverages for your restaurant from a beverages manufacturing company named XYZ Distilleries. The food and drink manufacturing company has a customer portal for you to register your restaurant as a customer. You can use the customer portal to onboard your profile into the database of XYZ Distilleries and communicate regarding your interest to procure beverages.

The following steps outline a high-level view of the customer experience from an initial contact to approved customer:

1. You, as a representative of ABC Restaurant, register on the XYZ Distilleries Customer Portal.
2. You sign up into the Customer Portal or receive an invitation email with the user credentials from XYZ Distilleries.
3. You sign in to the XYZ Distilleries Customer Portal, fill out an application form and submit the application form to become a valued customer of Distilleries.
4. A manager from XYZ Distilleries reviews the online application and approves your profile as a valued customer of XYZ Distilleries.



5. You receive an email confirming that your profile as a valued customer of XYZ Distilleries is approved.
6. You can add contact names for the people at ABC Restaurant.
7. The contacts receive an email with user credentials and a link to the XYZ Distilleries Customer Portal.
8. You sign into the Customer Portal and see a welcome dashboard.
9. You can use the Customer Portal to maintain your profile, order items to buy from XYZ Distilleries, monitor delivery, and communicate with XYZ Distilleries for other requirements.

## Customer Portal Onboarding

When a customer signs up through the Customer Portal, the customer must enter the basic details to register the profile.

After the sign up is complete, the customer receives an email confirming the registration and inviting the customer to complete the online application. The online application form contains multiple pages. Each page focuses on a different type of information, such as financial details, insurance, and documents.

After a customer submits an application form, the submission triggers a review process. At this point, the customer is in the submitted state. A business user with the manager profile can then review the customer profile and approve, reject, or send back the application requesting additional details.

After the profile is approved, the status of the customer changes to approved state. An approved customer can access all the necessary pages in the Customer Portal to update information and upload documents. When a customer signs in to the Customer Portal, the portal displays a welcome dashboard. In the left navigation panel, the customer can access various pages related to the customer profile. Any update from the customer triggers the review process for the changes made.

## Customer Onboarding Status

Customer profiles have an onboarding status, which is set and updated as the customer progresses through registering on the Customer Portal, submitting an application, and finally being approved, declined, or sent back for additional information.

The following table describes the onboarding status values:

Onboarding Status	Description
Registered	A customer registers on the Customer Portal.
Submitted	A customer completes and submits the online customer application form.
Send Back	A manager sends back the application to the customer for additional details. A customer can update the details requested and re-submit the application for evaluation.
Approved	A manager approves the customer application.
Rejected	A manager rejects the customer application.

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