Informatica

Informatica® MDM - Supplier 360
10.3 HotFix 1

Installation and Configuration Guide

Informatica MDM - Supplier 360 Installation and Configuration Guide
10.3 HotFix 1
May 2019

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Publication Date: 2020-06-29

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Preface

This guide is intended for the MDM administrators. The administrators use the guide to install, configure, and customize the Informatica MDM - Supplier 360 application. For more information about configuring the underlying Informatica Multidomain MDM environment, see the *Multidomain MDM Configuration Guide*.

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.

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.

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.

Informatica Marketplace

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

Informatica Global Customer Support

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

To find your local Informatica Global Customer Support telephone number, visit the Informatica website at the following link:
https://www.informatica.com/services-and-training/customer-success-services/contact-us.html.

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

CHAPTER 1

Introduction to Informatica MDM - Supplier 360

This chapter includes the following topics:

- Informatica MDM - Supplier 360 Application Overview, 9
- Architecture, 11
- Supplier Data Models and Database Schema, 13
- User Roles, 13
- Business Processes for Supplier Management, 14
- Product Information Management Integration, 16

Informatica MDM - Supplier 360 Application Overview

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

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

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

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

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

Supplier 360 contains the following components:

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

Example

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

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

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

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

Informatica Solution

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

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

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

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

Results

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

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

Architecture

The Application requires Multidomain MDM with Data Director and the embedded Informatica ActiveVOS Server. For mapping data, you can use any ETL product, such as Informatica PowerCenter. For product catalogs, you can use any Product Information Management system, such as Informatica Product 360.

The following diagram shows Supplier Relationship Management in the center and the Supplier Portal to the right. The inputs to the MDM Hub are internal and external data sources. A PIM system is optional.

Supplier Management

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

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

Informatica Multidomain MDM

Supplier Relationship Management includes the standard Informatica MDM components:

Hub Store

Databases that store and consolidate business data. The Hub Store consists of an MDM Hub Master Database and Operational Reference Stores. The Application ships with a database schema that you use to create an Operational Reference Store for supplier master data.

Hub Server

A J2EE application that you deploy on an application server. The Hub Server processes data within the Hub Store and integrates the MDM Hub with external applications. The Hub Server is the run-time component that manages core and common services for the MDM Hub. It also manages user authentication across all components.

Process Server

A J2EE application that you deploy on an application server. The Process Server cleanses and matches data and performs batch jobs such as load, recalculates best version of the truth, and revalidates. The Process Server interfaces with cleanse engines to standardize the data and to optimize the data for match and consolidation.

ActiveVOS Server

Business process management software that automates business processes. The Application ships with business processes that help you to manage the supplier lifecycle. These processes ensure that authorized business managers review supplier applications and review internal updates to master data.

Data Director

A browser-based interface that business managers use to view and manage data. The Application ships with Supplier 360, which contains an enterprise-level Start workspace focused on suppliers and customizable Entity 360 views designed for business managers.

Hub Console

A browser-based interface that administrators use to manage the MDM Hub and data stewards use for managing records and batch processing of records.

Supplier Portal

The Supplier Portal is a web application that you implement in a public-facing website. Suppliers use the Supplier Portal to initiate and maintain a supplier relationship with your organization.

The Supplier Portal requires that users log in. The MDM Server manages user authentication through its Security Access Manager.

Product Information Management Integration

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

When Product 360 is pre-installed, the Application integrates Informatica MDM and the Supplier Portal with Product 360 through an MDM-PIM adapter. The MDM Hub Server manages user authentication with Product 360 through its Security Access Manager and a customized security provider.

If you want to integrate the Application with a third-party PIM system, contact your Informatica representative. Your representative can request the customization of the MDM-PIM adapter for the third-party PIM system.

Supplier Data Models and Database Schema

You configure an Operational Reference Store to use a database schema designed for supplier data. The Application ships with a conceptual data model, a logical data model, and the database schema.

Conceptual Data Model for Supplier Data

The conceptual data model presents the entities, attributes, and relationships for supplier data.

Logical Data Model for Supplier Data

The logical data model presents the structure of the Operational Reference Store for supplier data, including the tables, columns, foreign key relationships, and lookups.

Database Schema for Supplier Data

The database schema contains the base object tables, staging tables, and other elements required to create the schema for supplier data. You have a choice about whether you start the implementation with empty tables or whether you start with reference data. If you use the reference data, some of the repository tables are set up for you.

You can find the data model diagrams and a description of the database schema in the distribution package.

User Roles

MDM Hub user roles control read and write privileges in the Operational Reference Store that contains the supplier master data.

The Application has the following MDM Hub user roles:

User roles for system users

User roles for system users include Application Administrator, Data Steward, and Data Entry Operator. The Application Administrator role is for a super user, who has full privileges.

User roles for business users

User roles for business users control the data privileges in the Operational Reference Store and also the review privileges in business processes. Each business user who is authorized to participate in supplier management receives one or more role assignments. Many people can have the same role.

Supplier 360 includes predefined roles for the following business users:

- Commodity Manager
- Finance Manager
- Contracts Manager
- Compliance Manager

User roles for the Supplier Portal

User roles for the Supplier Portal control which pages can be edited and by whom. When an authorized supplier representative edits a page, the data in the Operational Reference Store is updated.

Supplier 360 includes the following predefined roles in the MDM Hub:

- Supplier Administrators
- Supplier Users

Business Processes for Supplier Management

Business processes help you automate some common supplier lifecycle management workflows.

The Application ships with ActiveVOS business processes for the following workflows:

- Create a supplier (initiated from the Supplier Portal)
- Create or update a supplier profile (initiated from Supplier 360)
- Delete a supplier (initiated from Supplier 360)

For more information about the business processes, see the chapter on *Business Processes for Supplier Management*.

Supplier Profile

After a supplier is approved, the supplier application is converted to a supplier profile. The supplier profile contains all the information from the application.

Supplier representatives use the Supplier Portal to view their supplier profile. When a supplier representative signs on to the Supplier Portal, the representative sees the Welcome dashboard. In the left navigation panel under Company, the links summarize the information that makes up the supplier profile. In the display area, the representative can see messages, links to catalogs, notifications, renewal alerts, invoices, and some performance metrics. Authorized supplier representatives can modify information, add supporting documentation, upload catalogs, and monitor performance.

Business users use Supplier 360 to open and view supplier profiles. A data steward can edit data in the supplier profile, send notifications to the supplier, and change the status of a supplier. A data steward can also create supplier profiles.

If the Supplier Portal connects to a Product Management Information (PIM) system, the product catalog upload and product catalog management operations are available to the suppliers. The supplier must have the necessary permissions to upload and edit product catalogs.

The following image shows the Supplier Portal user interface when the environment has a PIM system:

The following image shows the Supplier Portal user interface when the environment does not have a PIM system:

Storage for Supplier Documents

When the Operational Reference Store resides in an Oracle database or a Microsoft SQL Server database, you can upload documents to the Operational Reference Store. Documents can include proof of insurance, certifications, or any other documentation required by your organization.

You can upload documents in any of the following file formats: .pdf, .doc, .png, and .jpg. The Operational Reference Store stores the files as blobs (binary large objects) and the metadata about the stored files resides in a FILE_METADATA table, which is a child table of the party base object (PARTY_BO).

Supplier 360

Business managers use Supplier 360 to access supplier master data. Supplier 360 runs in Informatica Data Director and acts on the supplier records stored in the Operational Reference Store that contains supplier data.

Business managers can view enterprise-level information about suppliers and view 360 degree information about a supplier. From the Start workspace, managers participate in the review process and monitor all suppliers. From the Data workspace, managers can edit supplier profiles, change the status of a supplier profile, create alerts that appear in the Supplier Portal, and launch the Entity 360 views. From the Entity 360 views, managers monitor supplier compliance and monitor supplier performance. After editing a supplier profile, the manager can initiate a business process where other business managers review and approve the edits.

Online Supplier Application Form

When a supplier wants to become a supplier to a buyer organization, the supplier registers on the Supplier Portal and completes an online supplier application form. The application form prompts the supplier to provide all the information that the buyer requires to begin a qualification process. Each page of the application focuses on a different type of information, such as general company information or banking information.

As a supplier representative fills out the application through the Supplier Portal, the MDM Hub stores the records that make up the application in a pending state in the Operational Reference Store. After the supplier representative submits the application, the application goes through a business approval process. If business users approve the application, the supplier becomes an approved supplier and the application becomes the supplier profile. In the Operational Reference Store, the state of the profile records changes from pending to active. The MDM Hub links the records to construct a 360 degree supplier profile.

The data from the application is now the official supplier profile.

Supplier Profile Maintenance

Approved suppliers use the Supplier Portal to manage their supplier profile.

Authorized supplier representatives can add contacts, monitor delivery performance, receive notifications, and keep data and certifications up-to-date. If the application environment includes a Product Information Management (PIM) system, a supplier representative can also upload a product catalog to the PIM system.

Product Information Management Integration

When the Supplier 360 environment includes a Product Information Management (PIM) system, suppliers can view their product catalogs from the Supplier Portal. Suppliers can also upload a product catalog to the PIM system from the Supplier Portal.

MDM-PIM Adapter

The MDM-PIM adapter integrates the Application with a PIM system. The adapter handles signing into the systems and coordinates activities between the Application and the PIM system.

The adapter is preconfigured for Product 360. If you want to integrate the Application with a third-party PIM system, contact your Informatica representative. Your representative can request the customization of the MDM-PIM adapter for the third-party PIM system.

The following table lists the actions that a business user or a supplier representative can take in one system that causes a change in the other system:

Action	MDM-PIM Adapter Actions
In Supplier 360, a business user qualifies a supplier by participating in a review process.	Creates a user with the same user credentials as the qualified supplier in the PIM system. Adds the PIM supplier ID to the supplier profile in the Operational Reference Store.
In the Supplier Portal, a supplier representative uploads a product catalog.	Replaces the product catalog in the PIM system.
In Supplier 360, a business user deactivates a supplier.	Deactivates the supplier in the PIM system.
In Supplier 360, a business user deletes a supplier.	Deletes the supplier from the PIM system and from the Operational Reference Store.
In the Supplier Portal or Supplier 360, a supplier representative or a business user adds users as contacts.	Creates users in the PIM system with the same user credentials.
In the PIM system, a business user changes supplier information.	Updates the supplier information in the Operational Reference Store.

Product Catalogs

When the Supplier 360 environment includes a Product Information Management (PIM) system, suppliers can view and upload their product catalogs from the Supplier Portal.

Business managers can upload catalogs from the PIM system user interface.

CHAPTER 2

Supplier 360 Installation Overview

This chapter includes the following topics:

- Installation Overview, 18
- Read the Release Notes, 18
- Verify Software Requirements, 19
- Installation Topology, 19

Installation Overview

The Supplier 360 application requires Multidomain MDM and, optionally, a product information management system, such as Product 360. You must install these products before you install the Application.

You receive Supplier 360 as an archive file. The archive contains configuration files, template files, and a setup script. You edit the configuration files to specify properties that reflect your environment. You also need to replace template files with customized files, such as replacing the placeholder logo file with a file containing your organization logo. Then you can run the setup script.

Installation of Supplier 360 consists of the following steps:

1. Read the Release Notes.
2. Verify the software requirements.
3. Perform the pre-installation tasks.
4. Install the application.
5. Complete the post-installation tasks.

Read the Release Notes

Read the *MDM - Supplier 360 Release Notes* for updates to the installation and upgrade process. You can also find information about known limitations for the release.

Verify Software Requirements

Set up the Multidomain MDM environment before you install Supplier 360.

Perform the following tasks:

1. Review the Product Availability Matrix for Supplier 360 to discover the system requirements and supported versions for products, databases, and application servers. You can find all Product Availability Matrices at https://network.informatica.com/community/informatica-network/product-availability-matrices.
2. Install a supported version of Informatica Multidomain MDM, including Informatica Data Director and the embedded version of Informatica ActiveVOS Server. Follow the instructions in the *Multidomain MDM Installation Guide* or the *Multidomain MDM Upgrade Guide* for your environment.

   Note: When you create the Operational Reference Store, you must use the name `supplier_hub`.
3. If using a PIM system, install a supported version of Product 360 or a third-party PIM product.

   Note: If you want to integrate the Application with a third-party PIM system, contact your Informatica representative. Your representative can request the customization of the MDM-PIM adapter for the third-party PIM system.

Verify Minimum System Requirements

Supplier 360 requires the same system requirements as Informatica MDM.

To use the Supplier Portal, enable cookies in the browser.

For more information about product requirements and supported platforms, see the Product Availability Matrix at: https://network.informatica.com/community/informatica-network/product-availability-matrices.

Installation Topology

You can use Supplier 360 application with or without MDM - Product 360.

Based on your requirements, use one of the following installation topologies:

With Product 360

Supplier 360 is integrated with Product 360. In this mode, the Supplier portal uses the following Product 360 services:

- Timeline that shows updates from Product 360
- Product catalog management
- User authentication and user management

Without Product 360

Supplier 360 is integrated with an external user management system or an external product information management system. You can use the external user management system or the product information management system to handle the user authentication and user management.

Note: If you use an external user management system, configure an external custom adapter to manage user, and build email templates for ActiveVOS to handle user invitations and password resets. For more information about configuring a custom adapter, contact your Informatica representative.

Standalone Mode

Supplier 360 is not integrated with Product 360 or any other products. Supplier 360 uses Multidomain MDM for user authentication and user management.

CHAPTER 3

Before You Install

This chapter includes the following topics:

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- Create the Operational Reference Store, 22
- Import the Database Schema into the Operational Reference Store, 24
- Integrate the MDM Hub with Informatica Address Verification Cleanse Engine, 27
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- Configure Email Templates, 41
- Configure Product Information Management, 44

Extract the Application

You receive the Supplier 360 application as an archive file. Create the following directory structure and extract the contents of the Supplier 360 archive file into it:

```
<MDM Installation Directory>/app/tsr
```

The extracted content contains the following files and folders:

- `bin/`. Contains build files, the setup script, and an uninstall wizard.
- `bpm/`. Contains the ActiveVOS email service and the default business processes in a deployable format.
- `config/`. Contains configuration properties files.
- `datamart/`. Contains the datamart service and the chart configurations.
- `docs/`. Contains the Supplier 360 Data Dictionary document.
- `email-config/`. Contains the directory that defines the email templates. The email templates are used by the ActiveVOS email service.
  - `templates/`. Contains the `avos-templates` and `pim-templates` subdirectories with email body text templates for ActiveVOS and for Informatica MDM - Product 360.

- `externalcall/`. Contains files for external web services.
- `hub/`. Contains the subdirectories that contain the database schema and the configuration files to deploy to Data Director.
  - `cocsconfig/`. Contains configuration files for composite objects and composite services.
  - `entity360config/`. Contains copies of the Entity 360 component instance definitions that ship with Informatica MDM.
  - `idd/`. Contains the configuration files that you use to create the Supplier 360 interface in Data Director.
  - `schema/`. Contains the database schema for supplier data and reference data.
- `images/`. Contains placeholder images for a logo and for a background image for the Supplier Portal login page.
- `lib/`. You must include external libraries in this folder.
- `localizationScript/`. Contains the scripts for localizing labels and error messages.
- `lookuplocalization/`. Contains files for localization of the lookup tables.
- `pre-install-config/`. Contains a file to set global application properties and a file to set the list of products and services in the Supplier Portal.
- `reporting/`. Contains the Highcharts editor, and the Highcharts projects.
- `resources/`. Contains the resource `bundle.properties` files for each of the supported locales.
- `userprofile-provider/`. Contains the configuration files that you use after the installation is finished. Contains the `appconfig.properties`, `PIMLoginProvider.jar`, and `RoleMappingSource.xml` files.
- `appconfiguration.war` file.
- `bundleLocalization.jar` file.
- `MDMAppsServices.war` File for Supplier 360 user interface.
- `mdmappsview-ear.ear` File that contains Supplier 360 components.
- `productversion.jar` JAR file for the product version.
- `provisioning-ear.ear` File for the Provisioning tool user interface.
- `supplierapp-ear.ear` file.
- `supplierexternalcall.war` file.
- `uiwebapp-ear.ear` File for Supplier 360 user interface.

Create the Operational Reference Store

Create an Operational Reference Store with the schema name `supplier_hub`. When entering database parameters, use the parameters that you specified when you created the Oracle database instance.

Note: You must use the name supplier_hub. If you use a different name, the integration with Product 360 does not work.

1. Navigate to the following directory:

   `<MDM installation directory>/hub/server/bin`

2. Run one of the following commands:
   - On Windows. `sip_ant.bat create_ors`

- On Linux. `sip_ant.sh create_ors`

3. Enter values for the Operational Reference Store parameters.

   Note: The prompts display default text in brackets. Press **Enter** to use the default value and go to the next prompt.

Parameter	Description
Oracle Connection Type	Enter the type that you specified for the Oracle database instance.
Operational Reference Store DB host name	Enter the IP address of the host running Oracle.
Operational Reference Store DB port number	Enter the port number that Oracle uses.
Operational Reference Store DB service name	If the Oracle Connection Type=service, enter the name of the Oracle service that you specified for the Oracle database instance.
Oracle Net connect identifier	Enter the TNS name that you specified for the Oracle database instance.
Connect URL	Use the default URL unless you are required to change the URL for business reasons or technical reasons.
Operational Reference Store DB user name (schema name)	Enter `supplier_hub`.
Operational Reference Store DB user password	Enter a password to assign to the supplier_hub user.
Locale name	Enter the language to use.
DBA user name	Enter the user name for the Oracle database instance.
DBA password	Enter the password for this user.
MDM index tablespace	Use the default value. Creates a tablespace to contain the index components for the Operational Reference Store.
MDM temporary tablespace	Use the default value. Creates a tablespace to contain the temporary components for the Operational Reference Store.
Oracle temporary tablespace	Use the default value. Creates a tablespace to contain the temporary components for the database instance.

   The script triggers the process that creates the Operational Reference Store.

4. If the process fails, check the log file for errors:

   ```
   <MDM installation directory>/hub/server/bin/sip_ant.log
   ```

Import the Database Schema into the Operational Reference Store

After you create the Operational Reference Store, import the database schema from a change list.

After you create the schema, you edit and upload XML files to repository tables. The XML files are required for Supplier 360.

Importing the MDM Metadata

After you create the supplier_hub Operational Reference Store, import the MDM metadata into the Operational Reference Store.

1. Navigate to the following directory:

   `<MDM installation directory>/hub/server/bin`

2. Run one of the following commands:
   - On Windows. `sip_ant.bat import_ors`
   - On Linux. `sip_ant.sh import_ors`

3. Enter values for the Operational Reference Store parameters.

   Note: The prompts display default text in brackets. Press **Enter** to use the default value and go to the next prompt.

Parameter	Description
Database Type	Enter Oracle.
Oracle Connection Type	Enter the type that you specified for the Oracle database instance.
Operational Reference Store DB host name	Enter the IP address of the host running Oracle.
Operational Reference Store DB port number	Enter the port number that Oracle uses.
Operational Reference Store DB service name	If the Oracle Connection Type=service, enter the name of the Oracle service that you specified for the Oracle database instance.
Oracle Net connect identifier	Enter the TNS name that you specified for the Oracle database instance.
Connect URL	Use the default URL unless you are required to change the URL for business reasons or technical reasons.
Operational Reference Store DB user name (schema name)	Enter `supplier_hub`.
Operational Reference Store DB user password	Enter the password for the supplier_hub user.
Locale name	Enter the language to use.

Parameter	Description
DBA user name	Enter the user name for the Oracle database instance.
DBA password	Enter the password for this user.
Timeline granularity	Enter the timeline units to use. **Note:** After the database schema is imported, you cannot change the timeline granularity.

The script triggers the process that loads the metadata into the Operational Reference Store.

4. If the process fails, check the log files for errors. You can find log files in the following locations:
   - User input errors. `<MDM installation directory>/hub/server/bin/sip_ant.log`
   - Database errors. `<MDM installation directory>/hub/server/bin/<database type>/seed.log`

Registering the Operational Reference Store

Register the supplier_hub Operational Reference Store.

1. Log in to the MDM Hub Console.
2. In the Configuration workbench, click **Databases**.
3. From the main menu, click **Write Lock** > **Acquire Lock**.
4. Click **Register database**.

   The Informatica MDM Hub Connection Wizard starts.
5. Follow the online instructions to specify the same parameters that you specified when you created the Operational Reference Store.
6. On the Summary page, click **Test Database**.

   The Wizard tests the database connection parameters.
7. Ensure that the **Create datasource after registration** check box is selected.
8. Click **Finish**.
9. When prompted, enter the user credentials for the application server.

   The wizard creates a data source.

Importing the Application Metadata

The metadata for the supplier database schema resides in an MDM Hub change list. You import the change list into the Hub Store. The metadata change list creates components, such as landing tables, user exits, lookup tables, staging tables, base objects, and match and merge rules. The created tables are empty.

1. In the Hub Console, in the Configuration workbench, click **Repository Manager**.
2. Click the **Import** tab.
3. Click the button next to the Source field.

   The **Open Repository** dialog box opens.
4. Click **File Repository**.

5. Navigate to the following directory:

   `<MDM installation directory>/app/tsr/hub/schema/met-export`

6. Select the `SUPPLIER_hub_change.xml` file, and click **OK**.
7. From the Target field, select **supplier_hub**.
8. Select all the schema components and click **Apply**.

   The Repository Manager imports the selected components from the change list.

Creating an Additional Repository Table

After you import the change list, add the C_REPOS_APP_CONFIG repository table. To add the table, run two scripts.

1. At a command prompt, navigate to the following directory:

   `<MDM installation directory>/app/tsr/hub/schema/ddl`

2. Use a database tool to run the following script:

   `DDL_C_REPOS_APP_CONFIG_ORACLE.sql`

3. Open the following file in an editor:

   `DDL_S_FILE_REPOS_ORACLE`

4. Edit the following line to point to the supplier_hub:

   `CREATE TABLE supplier_hub.S_FILE_REPOS`

5. Save the file with the file extension .sql.
6. Use a database tool to run the following script:

   `DDL_S_FILE_REPOS_ORACLE.sql`

Inserting Reference Data

After you import the metadata, you can populate the tables with some reference data. By using reference data, you can complete the configuration steps faster, because you do not have to insert the rows into the tables manually.

1. At a command prompt, navigate to the following directory:

   `<MDM installation directory>/app/tsr/hub/schema/reference-data`

2. Use a database tool to run the following script:

   `Supplier_lookup_script_oracle.sql`

3. Verify that the lookup records loaded successfully from the Hub Console.
   a. In the Hub Console, in the Utilities workbench, click **Batch Group**.
   b. Expand **BG_All_Lookup_Load** and select **Control & Logs**.
   c. In the Logs for each job table, review the Status column to verify that the load was successful. The Total records column shows the number of records added. The columns to the right of the Total records column displays zeros if all records load successfully.
   d. If the load was unsuccessful, try running the load. Select **BG_All_Lookup_Load** and click **Execute**.
4. Use a database tool to run the following script:

   `INSERT_C_REPOS_APP_CONFIG_ORACLE.sql`

   The table C_REPOS_APP_CONFIG is populated with reference data.

Integrate the MDM Hub with Informatica Address Verification Cleanse Engine

You must integrate the MDM Hub with the Informatica Address Verification cleanse engine for Supplier 360. Use the Informatica Address Verification Adapter for the integration.

For more information about integrating the MDM Hub with the Informatica Address Verification cleanse engine, see *Informatica MDM Multidomain Edition Cleanse Adapter Guide*.

Import InfaSupplierMaster into Data Director

If you use subject areas, import the InfaSupplierMaster.zip file as a Data Director application, and then deploy it.

The InfaSupplierMaster file contains the user interface for business users. You configure the URL for the MDM File Manager. Then you import, validate, and deploy the Data Director application.

Importing InfaSupplierMaster into Informatica Data Director

Import the `InfaSupplierMaster.zip` file as an IDD application, and then deploy it.

1. Start Data Director Configuration Manager.

   `https://<hostname>:<port>/bdd/config`
2. Click **Import** > **Import Complete IDD Application (ZIP)**.
3. Click **Browse**, and navigate to the following directory:

   `<MDM installation directory>/app/tsr/hub/idd`
4. Select `InfaSupplierMaster.zip`, and click **Open**.
5. Click **Import**.
6. Under **Bind Logical ORS**, select **supplier_hub**.
7. Click **Save**.

   Data Director imports and validates the Data Director application. This might take some time.
8. Review the validation results, and resolve the errors, if any.
9. With the application selected, click **Application State** > **Full Deployment**.

   Data Director deploys the Data Director application.

Assign a Message Queue for the Message Triggers

You must specify a message queue for each of the predefined message triggers of the Party and Party Relationship base objects.

1. Log in to the MDM Hub Console.
2. In the **Model** workbench, click **Schema**.

3. Acquire a write lock.
4. Expand the `Party` base object, and select **Message Trigger Setup**.
5. Select a target message queue for each of the message triggers.
6. Expand the `Party Relationship` base object, and select **Message Trigger Setup**.
7. Select a target message queue for each of the message triggers.
8. Click **Save**.

Configuring the Setup Properties

Set the configuration properties that the setup script requires. If you change these properties in the future, you need to rerun the setup script.

You set properties in the following files:

- `appconfig.properties`
- `connection_properties.properties`
- `siperian-client.properties`
- `log4j.xml`

Configuring the Connection Properties

Set the connection properties for the database and the application server.

1. Navigate to the following directory:

   `<MDM installation directory>/app/tsr/config`
2. Open the `connection_properties.properties` file in an editor.

3. Set the following properties:

Property	Description

jdbc.dialect	To enable the property, uncomment the property with the value that is specific to the database you use. Comment out the same properties with values specific to other databases.
	For example, the following code enables the property for the Oracle 10g database and disables the same property for Microsoft SQL Server database:
	`#jdbc.dialect=org.hibernate.dialect.SQLServerDialect`
	`jdbc.dialect=org.hibernate.dialect.Oracle10gDialect`
	Note: Do not edit the value of these properties or the connection might fail.

jdbc.datasource	The datasource JNDI name. Set the property to the supplier_hub datasource. For example, the following code sets the property to the supplier_hub datasource `jdbc.datasource=java:jboss/datasources/jdbc/siperian-localhost-orcl-supplier_hub-ds`
siperian-client.orsId	Database ID of the Supplier 360 Operational Reference Store. In the Hub Console, go to **Configuration** > **Databases**, and then select the Supplier 360 Operational Reference Store to see the Database ID.

4. Save the file.

Configuring the Properties for the Application Configuration Tool

Set the value of the JDBC data source. Do not edit the other properties in this file or the connection might fail.

1. At a command prompt, navigate to the following directory:

   `<MDM installation directory>/app/tsr/config`

2. Open the `appconfig.properties` file in an editor.
3. Set the value of the `jdbc.datasource` property to match the value that you set in the `connection_properties.properties` file.
4. Save the file.

Configuring the Client Properties

Set the Database ID for the Operational Reference Store and the InitialContext parameters, based on the application server that you use.

1. At a command prompt, navigate to the following directory:

   `<MDM installation directory>/app/tsr/config`

2. Open the `siperian-client.properties` file in an editor.

3. Set the following properties:

Property	Description
siperian-client.orsId	Database ID of the Supplier 360 Operational Reference Store. In the Hub Console, go to **Configuration** > **Databases**, and then select the Supplier 360 Operational Reference Store to see the Database ID.
http.call.url	URL for the HTTP requests. Use the following format: `http://<LocalIPAddress>:<port>/cmx/request` For example: `http.call.url=http://127.0.0.1:8080/cmx/request`
soap.call.url	URL for the Services Integration Framework (SIF) service. Use the following format: `http://<LocalIPAddress>:<port>/cmx/services/SifService` For example: `soap.call.url=http://127.0.0.1:8080/cmx/services/SifService`

4. Save the file.

Install the Application Configuration Tool

You must install the Application Configuration tool and set the Supplier 360 global configuration properties from the Application Configuration tool. The Application Configuration tool runs within the Data Director application.

Installing the Application Configuration Tool

To install the Application Configuration tool, run the `install-tsr` script.

1. Navigate to the following directory:

   `<MDM installation directory>/app/tsr/config`

2. Edit the following configuration files and specify the property values:

Configuration File	Property
appconfig.properties	JDBC source
connection_properties.properties	JDBC datasource, Database ID for the Operational Reference Store
siperian-client.propeties	Database ID for the Operational Reference Store, application server specific properties
log4j.xml	Location of the log file

3. At a command prompt, navigate to the following directory:

   `<MDM installation directory>/app/tsr/bin`

4. Run one of the following scripts:

- On Windows. `install-tsr.bat`
- On Linux. `./install-tsr.sh`

5. At the prompts, enter the following parameters:

Parameter	Description
MDM Hub installation directory	Press Enter to use the default path or type the fully-qualified path to the directory where you installed Informatica MDM Hub.
MDM Supplier 360 Application installation directory	Press Enter to use the default path or type the fully-qualified path to the directory that contains the Application files.
Application Server	Type the name of the application server in lowercase.
Application to deploy	Type appconfig.

Setting the cmx.dataview.enabled Property to True

If you use the subject areas, configure the value of the `cmx.dataview.enabled` property to `true`. Set the `cmx.dataview.enabled` property to `true` to display the Data tab, Application Configuration, and related elements appear in the Data Director applications.

1. Navigate to the following directory:

   `<MDM installation directory>/hub/server/resources`

2. Use a text editor to open the `cmxserver.properties` file.
3. Set `cmx.dataview.enabled=true`.
4. Save and close the file.
5. Restart the application server.

Enabling the HTTPS Protocol

If you use subject areas, and the MDM Hub and Product 360 are configured to use the HTTPS protocol, enable the HTTPS protocol for the Supplier 360 components.

1. Extract the `InfaSupplierMaster.zip` file located in the following directory:

   `<MDM installation directory>/app/tsr/hub/idd`

2. In a text editor, open the `BDDConfig.xml` file.
3. In the XML file, search for the following entries:
   - `<externalLink name="supplier_doc_child_link" type="IFRAME" url="http://@LOCALHOST@:@LOCALPORT@/supplierapp-war/mdm/supplierapp/document">`
   - `<externalLink displayName="App Configuration" name="appconfig" type="IFRAME" url="http://@LOCALHOST@:@LOCALPORT@/appconfiguration">`
4. In the `url` parameter of the selected entries, change `http` to `https`.
5. Save the XML file.

6. Log in to the IDD Configuration Manager, and select the application.
7. Click **Import** > **Import to existing IDD application**.
8. In the **Import to existing IDD application** dialog box, select **BDD Configuration**.
9. Click **Browse**, and select the `BDDConfig.xml` file.
10. Click **Import**.

Configure the Supplier 360 Properties

Before you install Supplier 360, configure the Supplier 360 properties that include connection parameters, security parameters, and workflow adapter-related parameters.

Setting Properties from the Application Configuration Tool

Set the properties related to connection and security in the Application Configuration tool.

1. Launch Supplier 360.

   ```
   http://<MDM Server host name>:<MDM Server port number>/mdmapps/
   com.informatica.tools.mdm.web.auth/login
   ```

2. Log in with your user credentials.
3. If prompted to select an application, select **InfaSupplierMaster**.
4. Click **App Configuration**.
5. Specify the properties based on your environment.

   For more details about the properties, see the "Supplier 360 Properties" on page 32.
6. Click **Save Changes**.

   Tip: To undo a change, click **Reset**.

Supplier 360 Properties

Use the Application Configuration tool to configure the Supplier 360 properties based on your environment.

You can configure the following Supplier 360 properties:

Connection Types

Configure the connection types based on your environment. When you configure different connection types, ensure that you use the HTTP port number even though your environment is configured to use the HTTPS protocol.

The following table describes the connection types and their properties:

Connection Type	Description	Host	Instance	User Credentials
MDMHub	Runs the business entity service and services integration framework (SIF) requests.	Name of the host that runs the MDM Hub.	Name of the Operational Reference Store of Supplier 360.	User credentials to execute the business entity service and services integration framework (SIF) requests.
Bpm	Provides access to the ActiveVOS workflows.	Name of the host that runs the Informatica ActiveVOS instance.	Reserved for future use.	User credentials of the trusted user to access the Informatica ActiveVOS instance.
FileService	Uploads documents from the Supplier Portal and Data Director.	Name of the host that runs the MDM Hub.	Name of the Operational Reference Store of Supplier 360.	User credentials to upload documents.
ExternalApp	Provides access to an external application, such as Product 360.	Name of the host that runs the external application.	Name of the Operational Reference Store of Supplier 360.	User credentials to access the external application. For Product 360, use the Product 360 Supplier Portal credentials.
email	Provides access to the ActiveVOS email service.	Name of the host that runs the Informatica ActiveVOS instance.	Name of the ActiveVOS email service. Specify `avosEmailNotification`.	User credentials of the trusted user to access the ActiveVOS email service.

System Configuration - JMS

The following table lists the properties that you can configure for Java Message Service (JMS):

Property	Description
JMS Connection Factory	Java Naming and Directory Interface (JNDI) name of the queue connection factory.
JMS Destination	JNDI name of the Hub outbound queue.

Supplier Portal Configuration

The following table lists the properties that you can configure for the Supplier Portal:

Property	Description
Licensed to	Organization to which Supplier 360 is licensed.
Email Address	Email address of the organization.

Property	Description
Copyright Text	Copyright notice to display on the Supplier Portal login page.
Terms of Use Link	Link to the terms of use content.
Session Idle Time	Number of seconds to wait before an idle session times out.
Session Timeout Warning Time	Number of seconds before a session timeout you want to display a warning message.

System Configuration - Source System

The following table lists the properties that you can configure for the source system:

Property	Description
Page Size	Maximum number of child records to retrieve for any parent record in the Supplier Portal.
Source System Name	Name of the source system when you create a profile in the Supplier Portal.

System Configuration - Custom Adapter

Lists the properties for the external adapter, such as a product information management system.

The following table lists the properties that you can configure for the custom adapter:

Property	Description
Custom Adapter Class Name	Name of the adapter class. If you use an external adapter, update the default adapter class.
Custom Adapter	Indicates whether you use a custom adapter for user management in Supplier 360.
Custom Adapter Location	Location of the custom adapter JAR file.

System Configuration - Mode of Operation

Indicates the mode of operation in which you want to run the application. You can run the application with or without Product 360.

The following table lists the properties that you can configure to specify the environment:

Property	Description
Support for the Product 360 Broker Users	Indicates whether to support the Product 360 broker users in Supplier 360.
HTTPS Support for Product 360	Indicates whether Product 360 uses a secure connection.
Standalone Mode	Indicates whether you use Supplier 360 without integrating it with other products.

Property	Description
User Management System	User management system to validate a user identity and manage user states in Supplier 360. **Note:** If you use standalone mode, use **MDM** as the user management system. If Supplier 360 is integrated with Product 360 or any other external user management system, use **External** as the user management system.
With Product 360	Indicates whether Supplier 360 is integrated with Product 360.

System Configuration - Workflow

The following table lists the properties that you can configure for the workflow:

Property	Description
Approval Workflow Name	Workflow to use when a supplier registers in the Supplier Portal.
SLA Approval Time	Maximum number of days required to approve or reject a supplier profile after the supplier submits an application form.
HTTPS Support for BPM	Indicates whether BPM uses a secure connection.
Workflow Adapter Type	Type of the adapter to use for workflow management.
Create Workflow Name	Name of the ActiveVOS create workflow.

Set Password Settings - Applicable for the MDM User Management System

The following table lists the properties that you can configure for the set password:

Property	Description
Password Requirements	Help text to display when a user sets password in the Supplier Portal.
Set Password Link Expiration Time	Time period after which a set password link expires. Use the days:hours:minutes format. For example, 01:15:30.
Password Expiration Warning Time	Number of days before password expires to notify users.

Twitter Configuration

The following table lists the properties that you can configure for Twitter:

Property	Description
Twitter Account	Twitter account to use in the dashboard.
Twitter Widget ID	Twitter widget ID for the dashboard.

System Configuration - File Management

The following table lists the properties that you can configure for the file management:

Property	Description
File Manager	Specifies the type of file manager to use in Supplier 360. **Note:** If you have upgraded Supplier 360 from a version earlier than 10.3, use **Legacy**.

Configure the Supplier Portal

You configure the list of products and services that your organization is interested in purchasing. You can also create a list of questions to ask suppliers questions about products and services.

Adding Images for the Supplier Portal

You can add a logo and a background image for the Supplier Portal sign in page.

Prepare your image files:

- Get a .png version of your logo and save it as `portal_logo.png`.
- Create a .png version of a background image and save it as `portal.png`

1. Navigate to the following directory:

   ```
   <MDM installation directory>/app/tsr/images
   ```

2. Copy the prepared image files to the images directory.

   Note: The file names must match the file names in the directory.

Configure the Products and Services Page

On the Supplier Portal, you can include a list of the products and services that your organization is interested in purchasing. When a supplier representative fills out the online supplier application form, the representative can select the products and services that the organization offers.

To populate the Products and Services page, first create the list of products and services as an XML file. Then add the content of the XML file to the page by loading the XML file into a repository table.

Creating the List of Products and Services

You create an XML file that contains a list of products and services. The list can be hierarchical to represent categories and subcategories. You can create as many levels of nested subcategories as you require.

1. Navigate to the following directory:

   ```
   <MDM installation directory>/app/tsr/pre-install-config
   ```

2. Open `prod_hierarchy.xml` in an XML editor.

3. Create a hierarchy of products and services.

Element	Description
`tns:products` (top-level element)	Use with the default attributes as the top-level parent element. Do not edit.
`tns:product`	Use to define a product, a service, or the name of a subcategory. Ensure that the element has a `code` attribute with a unique value and a `description` attribute that contains the text to display on the Products and Services page.
`tns:products` (subcategory)	Use without attributes to contain a list of products or services with a subcategory. Add this element as a child element of the target `tns:product` element.

4. Save the file.

Sample Product Hierarchy XML File

For example, to create the following hierarchy of products:

- Clothing & Handbags
  - BOYS CLOTHING
    - Basics
    - Clothing Sets
    - Footwear
    - Outerwear
    - Pants
    - School Uniforms
    - Shirts
    - Sleepwear
  - GIRLS CLOTHING
    - Basics
    - Clothing Sets
    - Footwear
    - Outerwear
    - Pants
    - School Uniforms
    - Shirts
    - Sleepwear

You create the following XML file:

```
<?xml version="1.0" encoding="UTF-8"?>
<tns:products
 xmlns:tns="http://www.informatica.com/solutions/supplier/prod_hierarchy"
 xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
 xsi:schemaLocation="http://www.informatica.com/solutions/supplier/prod_hierarchy
  prod_hierarchy.xsd">
 <tns:product code="1Clo" description="Clothing &amp; Handbags">
  <tns:products>
   <tns:product code="2CloBOY" description="BOYS CLOTHING">
    <tns:products>
     <tns:product code="3CloBOYBas" description="Basics"></tns:product>
```

```
      <tns:product code="4CloBOYClo" description="Clothing Sets"></tns:product>
      <tns:product code="5CloBOYFoo" description="Footwear"></tns:product>
      <tns:product code="6CloBOYOut" description="Outerwear"></tns:product>
      <tns:product code="7CloBOYPan" description="Pants"></tns:product>
      <tns:product code="8CloBOYSch" description="School Uniforms"></tns:product>
      <tns:product code="9CloBOYShi" description="Shirts"></tns:product>
      <tns:product code="10CloBOYSle" description="Sleepwear"></tns:product>
     </tns:products>
    </tns:product>
    <tns:product code="11CloGIR" description="GIRLS CLOTHING">
     <tns:products>
      <tns:product code="12CloGIRBas" description="Basics"></tns:product>
      <tns:product code="13CloGIRClo" description="Clothing Sets"></tns:product>
      <tns:product code="14CloGIRFoo" description="Footwear"></tns:product>
      <tns:product code="15CloGIROut" description="Outerwear"></tns:product>
      <tns:product code="16CloGIRPan" description="Pants"></tns:product>
      <tns:product code="17CloGIRSch" description="School Uniforms"></tns:product>
      <tns:product code="18CloGIRShi" description="Shirts"></tns:product>
      <tns:product code="19CloGIRSle" description="Sleepwear"></tns:product>
     </tns:products>
    </tns:product>
   </tns:products>
  </tns:product>
 </tns:products>
```

Uploading the List of Products and Services

After you create the list of products and services, you upload the XML file to a repository table. Then you populate a lookup table with the same values. You need to restart the application server to see the changes in the Supplier Portal

1. In a database tool that supports the BLOB data type, open the table C_REPOS_APP_CONFIG.
2. Do one of the following:
   - If a row exists with the value PRODUCT_HIERARCHY in the CONFIG_TYPE column, use this row.
   - If not, insert a row and enter PRODUCT_HIERARCHY in the CONFIG_TYPE column.
3. In the CONFIG_DATA column, load the `prod_hierarchy.xml` file.
4. Open the lookup table C_BT_PRDCTS_SRVCS.
   a. Insert a row.
   b. In the PRDCT_SRVC_CD column, enter the value of a `code` attribute for a `<tns:product>` element in the XML file.
   c. In the PRDCT_SRVC_DESC column, enter the value of the `description` attribute for the same `<tns:product>` element.
   d. Repeat the substeps to create rows for all the products and services defined in the XML file.
5. Restart the application server.

Sample Product Hierarchy on the Product and Services Page

The following image shows how the sample product hierarchy appears on the Product and Services Page after you restart the application server and refresh the browser instance:

Configure the Product Related Questions Page

On the Supplier Portal, you can include a list of questions about products and services. When a supplier representative fills out the online supplier application form, the representative can answer the questions.

To populate the Product Related Questions page, you add questions as records in a base object table. Then you populate a relationship base object with mappings between the questions and the products or services to which they apply. You can map the same question to more than one product or service.

Creating Questions about Products and Services

You add questions to the Product Related Questions base object by inserting records into the C_BO_PRDCT_RLTD_QSTNS table. You use the Data Manager in the Hub Console to insert records.

1. In the Hub Console, acquire a write lock.
2. In the Data Steward workbench, click **Data Manager**.
3. In the screen, set the following options:

Option	Description
Base Object	Select **Product Related Questions**.
Put package	Select **Package Product Related Questions**.
Display package	Select **Use put Package**.
Query	Do not set.

Option	Description
Page size	Do not set.

4. Click **Begin Administration**.
5. Click **Finish** to close the wizard without setting options.

   The wizard closes and the Data Manager screen appears.
6. Add questions one at a time. Click the **Add** icon.
7. In the **Record Editor** dialog box, set the following options:

Option	Description
Hub State Indicator	Select **1 - Active**.
Question	Type the question.
Active Indicator	Select **Yes**.

8. Click **OK**.
9. Add remaining questions.

Creating Relationships Between Questions and Products or Services

After you create both the list of products or services and the list of questions, you can create relationships between the products or services and the questions. You create the relationships in the Products and Services Questions Relationship base object by inserting records into the C_BO_PRDCT_SRVC_QSTN_REL table.

Note: You can map the same question to more than one product or service by creating a record for each mapping.

1. In the Hub Console, acquire a write lock.
2. In the Data Steward workbench, click **Data Manager**.
3. In the screen, set the following options:

Option	Description
Base Object	Select **Product And Services Questions Relationship**.
Put package	Select **Package Product Relates Ques Product Rel**.
Display package	Select **Use put Package**.
Query	Do not set.
Page size	Do not set.

4. Click **Begin Administration**.
5. Click **Finish** to close the wizard without setting options.

   The wizard closes and the Data Manager screen appears.

6. Add mappings one at a time. Click the **Add** icon.
7. In the **Record Editor** dialog box, set the following options:

Option	Description
Hub State Indicator	Select **1 - Active**.
Product Related Questions Id	Select the question.
Product and Service Code	Select the product or service to link with the question.
Mandatory Indicator	If suppliers must answer the question, select **Y**. Otherwise, select **N**.

8. Click **OK**.
9. Add remaining mappings.
10. Restart the application server.

Configure Email Templates

Some business processes and services send requests to the email service. The email service generates and sends personalized emails to supplier representatives.

To configure email templates, perform the following tasks:

- Edit the email template definitions to add buyer-side email addresses.
- Edit the predefined body text to reflect your organization name, contact information, and Service Level Agreement (SLA) information.

After you install Supplier 360, you configure the email service in ActiveVOS.

Configure the Email Templates

The email service creates personalized email messages based on email templates. A service request that invokes the email service includes the name of the email template and the values for email template attributes and for body text parameters.

The following table describes the email templates:

Email Template	Description
OnInvitationSupplier_en	Invites a representative from a qualified supplier to register on the Supplier Portal. Used by the buyer after implementing Supplier 360.
inviteNewSupplier	Invites a representative from a new supplier to go to the Supplier Portal, register, and fill out an application.
OnboardingRegistrationSupplier_en	Notifies the supplier representative that the Supplier Portal registration was successful and describes the next steps.
AfterRegistrationSupplier_en	Notifies the supplier representative that the submitted application was received and is under review.

Email Template	Description
AfterAcceptSupplier_en	Welcomes the supplier as an approved suppler.
AfterRejectSupplier_en	Notifies the supplier representative that their application was declined.
newSupplierUserEmail_en	Welcomes a supplier contact as a user of the Supplier Portal. The supplier representative can add multiple contacts on the Contacts page, and each person receives this email.
LostPassword_en	Notifies a user that someone has requested a password reset for the user account.
error_message	Notifies an administrator on the buyer-side when there is an error in the ActiveVOS workflow.

Email Template Attributes

The `emailConfig.xml` file contains the definitions of the predefined email templates.

In the XML file, the parent `<emailConfigs>` element contains multiple `<emailConfig>` elements, one for each email template. When a service requests an email, it must specify one of these email templates.

The following table describes the attributes that are defined within the `<emailConfig>` element:

Attribute	Value Type	Description
emailTemplate	*template name*	Specifies the name of the email template. The workflow or service that sends the request to the email service specifies which email template to use.
replyTo	*email address*	Specifies a buyer-side email address. This email address receives replies from the supplier representatives.
sendFrom	*email address*	Specifies a buyer-side email address. When a service request does not include an email address to display in the email From field, the email service uses this static email address.
subject	*text*	Specifies the text that appears in the subject line of the email.
template	*XSL template file name*	Specifies the name of the XSL email template that contains the body text for the email.
type	`text/html`	Specifies the format of the email message.

Example Email Template

The following XML sample contains the definition of an email template. When using this template, the email service creates a personalized email that uses the subject line "Supplier Portal - Next Steps" and the body text contained in the `RegistrationSuccessful_en.xsl` file. The personalized email is sent to the supplier representative.

```
<email-configs>
    <email-config emailTemplate ="registrationSuccessful">
        <replyTo>supplierrelationships@informatica.com</replyTo>
        <sendFrom>supplierrelationships@informatica.com</sendFrom>
        <subject>Supplier Portal - Next Steps</subject>
        <template>RegistrationSuccessful_en</template>
        <type>text/html</type>
```

```
</email-config>
...
</email-configs>
```

Editing the Email Templates

You configure the email templates to add a valid email address that can be used when the service request does not contain an email address. You might also want to add your organization name to the subject line.

1. Navigate to the following directory:

   `<MDM installation directory>/app/tsr/email-config`

2. Open `emailConfig.xml` in an editor.
3. Search for the `<sendFrom>` attribute and insert an email address. Repeat for each template.
4. Search for the `<replyTo>` attribute and insert an email address. Repeat for each template.
5. If you want, search for the `<subject>` attribute and add your organization name before "Supplier Portal." Repeat for each template.
6. Save the file.

Configure the Body Text in Email Templates

The email templates contain references to .xsl files. The .xsl files contain the body text that is used by the templates. You need to configure the .xsl files.

Different types of text appear in the files:

- Placeholder text, which is enclosed in square brackets, such as [organization name]
- Plain text for the message
- Parameters for personalization which start with `<xsl:value-of select=...>`

You need to replace placeholder text with your organization name and contact information. You can also edit the plain text and add or remove parameters.

Parameters Used in Email Body Text

When the email service generates a personalized email, it replaces parameters with values that it receives in the service request. For example, a welcome email can include user credentials for the Supplier Portal. Avoid editing these parameters.

The following tables describes the parameters that you can use in body text:

Parameter	Description
<a target="_blank" href="${loginPage}">	Link to the sign in page of the Supplier Portal
<xsl:value-of select="tns:sendEmail/properties/property[@name='firstName']"/>	First name of a supplier representative
<xsl:value-of select="tns:sendEmail/properties/property[@name='lastName']"/>	Last name of a supplier representative

Parameter	Description
<xsl:value-of select="tns:sendEmail/properties/property[@name='loginName']"/>	User name of a supplier representative, which is the representative's email address
<xsl:value-of select="tns:sendEmail/properties/property[@name='errorDesc']"/>	Error message

Editing the Body Text

In each XSL file, you need to edit the placeholder text to reflect details about your organization, such as the name and the contact information.

1. Navigate to:

   `<MDM installation directory>/app/tsr/email-config/templates/avos-templates`
2. Open an XSL file in an editor.
3. Search for an opening square bracket ([). Replace the square brackets and the enclosed text with the requested information.
4. Repeat the previous step until you replace all placeholder text.
5. Save the file.
6. Repeat for all other XSL files in this directory.

Configure Product Information Management

If the Supplier 360 environment includes Informatica Product 360, you must perform some pre-installation tasks for Informatica Product 360. Later, after you install the application, you finish the integration by configuring MDM Hub to manage user authentication between the Supplier 360 Supplier Portal and the Informatica Product 360 Portal.

Note: If you want to use a third-party PIM product, contact your Informatica representative.

Perform the following pre-installation tasks:

- Edit email templates for Informatica Product 360.
- Set the configuration properties in Product 360.
- Create users in the Product 360 Server.
- Edit the `webfrontend.properties` file.

Edit Email Templates for Informatica Product 360

The Application ships with modified email templates for Informatica Product 360. In each HTML file, edit the placeholder text to reflect details about your organization, such as the name and the contact information.

Avoid editing parameters, which start with the $ character. When you are finished, copy the templates to the Informatica Product 360 `mailTemplates` directory.

Note: The file names of the edited templates must match the file names of the original Informatica Product 360 email templates.

1. Navigate to the following directory:

   ```
   <MDM installation directory>/app/tsr/email-config/templates/pim-templates
   ```

2. Open an HTML file in an editor.
3. Search for an opening square bracket ([). Replace the square brackets and the enclosed text with the requested information.
4. Repeat the previous step until you replace all placeholder text.
5. Save the file.
6. Repeat for all other HTML files in this directory.
7. Copy the HTML files to the following directory:

   ```
   <PIM installation directory> /configuration/mailTemplates
   ```

8. If prompted to overwrite files, select **Yes**.

Set Configuration Properties in Product 360 Supplier Portal

In the Product 360 (PIM) configuration properties file, set user permissions and set the timeline and notification properties to their default values.

1. At a command prompt, navigate to the following directory:

   ```
   <PIM Supplier Portal directory>/configuration/
   ```

2. Open the `configuration.properties` file in a editor.
3. Set the permissions for the default user roles to the specified values:

   ```
   permissions.portalAdmin=VIEW_IMPORT_MANAGER, MANAGE_SUPPLIER_USER
   permissions.supplierAdmin=START_DRY_RUN
   ```

   Note: If these roles have additional permissions, remove the other permissions.

4. If you want the Supplier Administrator role to edit a catalog in the Supplier Portal, add the following entry to the file:

   ```
   global.permission.itemeditor=EDIT
   ```

5. Verify that the timeline and notification settings are set to default values:

   ```
   # Default values for email notifications of new feed messages
   # Supplier user
   feednotification.supplier.USER_REQUEST=true
   feednotification.supplier.USER_REGISTRATION=false
   feednotification.supplier.TEST_RUN_COMPLETE=true
   feednotification.supplier.IMPORT_RUN_COMPLETE=true
   # Portal user
   feednotification.portal.USER_REQUEST=true
   feednotification.portal.USER_REGISTRATION=true
   feednotification.portal.TEST_RUN_COMPLETE=false
   feednotification.portal.IMPORT_RUN_COMPLETE=true
   feedfilter.type
   ```

6. Save the file.

Create Users in the PIM Server

To provide access to the PIM Web Item Editor functionality from the Supplier Portal, you need to configure special PIM system users on the PIM server. You need to create a PIM Supplier Portal administrator user for actions triggered by a portal administrator. You also need to create two Product 360 Supplier Portal system users for actions triggered by suppliers.

The Supplier 360 administrator is a Product 360 Supplier Portal administrator user. This user must belong to a group that has all action rights. This user can call Product 360 APIs for the Supplier 360 application.

Suppliers are Product 360 Supplier Portal system users. These users either have edit access or read-only access to the Supplier Portal. All supplier calls from the Portal to edit product catalogs use the credentials of the PIM system user with edit access. Similarly, all supplier calls with read-only permissions use the credentials of the PIM system user with read-only access.

Creating an Administrative User in Product 360

You need to create an administrative user that can call the Product 360 APIs for Supplier 360. You create the user in the Product 360 Desktop and assign the user to a user group with all action rights.

1. Launch Product 360 Desktop.
2. To create a user, perform the following steps:
   a. Open the User perspective.
   b. Click **Management > User**.
   c. In the User view, click the **Add** icon.

      The Add action creates a row in the table.
   d. Specify the following properties:

Property	Description
User name	Name of the user. For example, `TSRAdministrator`.
Password	Password for the user. The password must have at least six characters.
Active	Select this option.
Name	Enter `TSR Administrator`.
Authentication Mode	Select **Internal** to indicate the user is an internal user.

   e. Click the **Save** icon.
3. To create a user group, perform the following steps:
   a. Open the User Group perspective.
   b. Click **Management > User Group**.
   c. In the User Group view, click the **Add** icon.

      The Add action creates a row in the table.
   d. Enter a name for the user group.
   e. Select **Active**.

f. Click the **Save** icon.

4. To map the user to the user group with all the action rights, perform the following steps:
   a. Right-click the user that you created, and then click **Object properties**. .
   b. Click the **Add** icon.
   c. Select the user group that you created, and then click **OK**.
   d. Select all the check boxes, and then click **OK**.
   e. Click **Management** > **Organization**.

      The Action Rights properties appear in the right pane and the list of user groups appears in the left pane.
   f. Select the group that you created, and then select all the actions in the right-hand pane.
   g. Click the **Save** icon.

Configuring Supplier Portal Groups and Users on the Product 360 Server

Suppliers can use the Product 360 Web Item Editor functionality as a Supplier Portal editor to upload, view, and edit their product catalogs. To use the Product 360 Web Item Editor, configure two PIM system users, one for suppliers with edit access and the other for suppliers with read-only access.

You have to create two PIM system users, one user with edit access and the other user with read-only access. The Product 360 server uses these users as default system users for Item Editor access through the Supplier Portal. The `webfrontend.properties` file of the Product 360 server must reference both users. This file must contain the user names and credentials of the two users.

1. In the Product 360 Desktop, create a Product 360 system user group with edit access permissions.
2. Add a user and assign the user to the user group with the edit access permissions.
3. Create a Product 360 system user group with read-only access permissions.
4. Add a user and assign the user to the user group with the read-only access permissions.
5. Log out of the Product 360 Desktop.
6. To finish configuring these users, edit the webfrontend.properties file.

Edit the webfrontend.properties File

Add the login name and password of the users that you created and then specify the Web client theme that is used with the application.

1. Navigate to the following directory:

   `<PIM installation directory>/server/configuration/HPM/`
2. Open the `webfrontend.properties` file in an editor.
3. To add the supplier users, set the following properties:

Property Name	Description
web.client.hsx.supplier.login	Login name of the supplier user with edit permission.
web.client.hsx.supplier.password	Login password of the supplier user with edit permission.

Property Name	Description
web.client.hsx.readonly.supplier.login	Login name of the supplier user with read-only permission.
web.client.hsx.readonly.supplier.password	Login password of the supplier user with read-only permission.

4. To set the client theme, set the following property to the specified value:

   `web.client.theme=symphony`

5. Save the file.

Sample Configuration for Users

The following example shows the configuration of users in the `webfrontend.properties` file for access to the PIM Web Item Editor from the Supplier Portal:

```
##########################################################
# Informatica PIM - Supplier Portal Integration          #
##########################################################
# Login name of HPM user that is used for supplier editor
web.client.hsx.supplier.login=hsx
# Login password of HPM user that is used for supplier editor
web.client.hsx.supplier.password=!!hsx!!

# Login name of HPM user that is used for supplier view
# This user has only read-only permissions
web.client.hsx.readonly.supplier.login=hsx
# Login password of HPM user that is used for supplier view
# This user has only read-only permissions
web.client.hsx.readonly.supplier.password=!!hsx!!
```

CHAPTER 4

Installing the Supplier 360 Components

This chapter includes the following topics:

- Installing the Supplier 360 Components Overview, 49
- Installing the Supplier 360 Application, 49
- Installing the Application Configuration Tool, 50
- Installing the Supplier Portal, 51

Installing the Supplier 360 Components Overview

After you finish the pre-installation tasks, you can install the Supplier 360 application, Application Configuration tool, and the Supplier Portal.

When you install the Supplier 360 components, ensure that you install them in the following order:

1. Supplier 360 application
2. Application Configuration tool
3. Supplier Portal

Installing the Supplier 360 Application

When you run the installer script, the installer script installs the Supplier 360 application and deploys the ActiveVOS workflows.

1. At a command prompt, navigate to the following directory:

   `<MDM installation directory>/app/tsr/bin`

2. Run one of the following scripts:
   - On Windows. `install-tsr.bat`
   - On Linux. `./install-tsr.sh`

3. At the prompts, enter the following parameters:

Parameter	Description
MDM Hub installation directory	Press Enter to use the default path or type the fully-qualified path to the directory where you installed Informatica MDM Hub.
MDM Supplier 360 Application installation directory	Press Enter to use the default path or type the fully-qualified path to the directory that contains the application files.
Application Server	Type the name of the application server in lowercase.
Application to deploy	Type `tsr`.
avos console username	Type the ActiveVOS Console username.
avos console password	Type the ActiveVOS Console password.

The script updates the `supplier-ear.ear` file.

Installing the Application Configuration Tool

You can use the Application Configuration tool to set the Supplier 360 global configuration properties.

1. At a command prompt, navigate to the following directory:

   `<MDM installation directory>/app/tsr/bin`

2. Run one of the following scripts:
   - On Windows. `install-tsr.bat`
   - On Linux. `./install-tsr.sh`
3. At the prompts, enter the following parameters:

Parameter	Description
MDM Hub installation directory	Press Enter to use the default path or type the fully-qualified path to the directory where you installed Informatica MDM Hub.
MDM Supplier 360 Application installation directory	Press Enter to use the default path or type the fully-qualified path to the directory that contains the application files.
Application Server	Type the name of the application server in lowercase.
Application to deploy	Type `appconfig`.

The script installs the Application Configuration tool.

Installing the Supplier Portal

Suppliers use the supplier portal to initiate and maintain a supplier relationship with your organization.

1. At a command prompt, navigate to the following directory:

   `<MDM installation directory>/app/tsr/bin`

2. Run one of the following scripts:
   - On Windows. `install-tsr.bat`
   - On Linux. `./install-tsr.sh`
3. At the prompts, enter the following parameters:

Parameter	Description
MDM Hub installation directory	Press Enter to use the default path or type the fully-qualified path to the directory where you installed Informatica MDM Hub.
MDM Supplier 360 Application installation directory	Press Enter to use the default path or type the fully-qualified path to the directory that contains the application files.
Application Server	Type the name of the application server in lowercase.
Application to deploy	Type `portal`.

The script installs the Supplier Portal.

CHAPTER 5

After You Install

This chapter includes the following topics:

- Configure the MDM Hub, 52
- Configure the Operational Reference Store, 58
- Populate Supplier 360 Charts with Data, 59
- Configure the ActiveVOS Email Service, 63
- Configure the Product 360 Properties, 64
- Configuring the Default Hierarchy, 65
- Import the Localized Lookup Data, 65
- Configure the SOAP Service, 66
- Configure the Browser Settings, 67
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- Test the Supplier Portal, 68
- Test Supplier 360, 68

Configure the MDM Hub

Perform the following post-installation tasks:

- Add user accounts and assign roles
- Configure the MDM Hub for Product 360

Add User Accounts and Assign Roles for Business Users

User roles for business managers control the data privileges in the MDM Hub and review privileges in business processes. Each data steward and business user who is authorized to participate in supplier relationship management receives one or more role assignments. Many people can have the same role.

To add user accounts and assign roles, perform the following tasks:

1. If the business users who need to use the Supplier 360 do not have MDM user accounts, add a user account for each business user.
2. Assign roles to users.
3. If you added new users, add the new users to the application server.

For more information about users and roles, see the *Multidomain MDM Security Guide*.

Role Privileges

You can assign any of the predefined or custom user roles to a user account.

The following table lists the predefined user roles that you can use and summarizes the role privileges:

Role	Add or edit a supplier profile	Review supplier applications or profile updates	Approve supplier applications or profile updates
ApplicationAdministrator	Yes	Yes	Yes
DataSteward	Yes	Yes	No
DataEntryOperator	Yes	No	No
CommodityManager	Yes	Yes	No
FinanceManager	Yes	Yes	No
ContractsManager	Yes	Yes	No
ComplianceManager	Yes	Yes	Yes

If you create a custom user role to provide restricted administrator access to the resources, ensure that you assign the user role with the minimum required resource privileges.

The following table lists the minimum resource privileges required for an administrator user role:

Resources	Read	Create	Update	Delete	Merge	Execute
Lookup Alternate Id Type	Yes	No	No	No	No	Yes
Lookup Business Title	Yes	No	No	No	No	Yes
Lookup Country	Yes	No	No	No	No	Yes
Lookup Electronic Address Type	Yes	No	No	No	No	Yes
Lookup Party Status Type	Yes	No	No	No	No	Yes
Lookup Party Status Value	Yes	No	No	No	No	Yes
Lookup Phone Type	Yes	No	No	No	No	Yes
Lookup Portal User Role	Yes	No	No	No	No	Yes
Lookup Postal Address Type	Yes	No	No	No	No	Yes
Lookup State	Yes	No	No	No	No	Yes
Party	Yes	Yes	Yes	Yes	Yes	Yes
Party Alternate Identifier	Yes	Yes	No	No	No	Yes
Party Electronic Address	Yes	Yes	No	No	No	Yes

Resources	Read	Create	Update	Delete	Merge	Execute
Party Phone Communication	Yes	Yes	No	No	No	Yes
Party Postal Address	Yes	Yes	No	No	No	Yes
Party Relationship	Yes	Yes	No	No	No	Yes
Party Status	Yes	Yes	No	No	No	Yes
Postal Address	Yes	Yes	No	No	No	Yes
AddressStandardization5	Yes		No	No	No	Yes
Hierarchy Manager Profile - Default	Yes	Yes	Yes	Yes	Yes	Yes
Supplier Hierarchy	Yes	Yes	Yes	Yes	Yes	Yes
DNB Domestic Ultimate Parent	Yes	Yes	Yes	Yes	Yes	Yes
DNB Global Ultimate Parent	Yes	Yes	Yes	Yes	Yes	Yes
DNB Immediate Parent	Yes	Yes	Yes	Yes	Yes	Yes
Employs	Yes	Yes	Yes	Yes	Yes	Yes
Organization Address	Yes	Yes	Yes	Yes	Yes	Yes
Package Additional Info Custom	Yes	No	No	No	No	Yes
Package General Info Custom	Yes	No	No	No	No	Yes
Package Party Edit	Yes	Yes	Yes	Yes	Yes	Yes
Package Party Postal Address Edit	Yes	Yes	Yes	Yes	Yes	Yes
Package Party Relationship Edit	Yes	Yes	Yes	Yes	Yes	Yes
Package Postal Address Edit	Yes	Yes	Yes	Yes	Yes	Yes
Package Product Related Ques Custom	Yes	No	No	No	No	Yes
Package Product Related Ques Info Custom	Yes	No	No	No	No	Yes
Package Sub Suppliers Info Custom	Yes	No	No	No	No	Yes
Package Supplier Bank Info Custom	Yes	No	No	No	No	Yes
Package Supplier Certificates Info Custom	Yes	No	No	No	No	Yes
Package Supplier Contacts Custom	Yes	No	No	No	No	Yes
Package Supplier Insurance Info Custom	Yes	No	No	No	No	Yes
Package Supplier Product Services Info Custom	Yes	No	No	No	No	Yes

Resources	Read	Create	Update	Delete	Merge	Execute
Package Supplier References Custom	Yes	No	No	No	No	Yes
Package Supplier Tax Info Custom	Yes	No	No	No	No	Yes
Package User Auth Custom	Yes	No	No	No	No	Yes
Supplier Documents Info Custom	Yes	No	No	No	No	Yes
Other Resources - USER	Yes	Yes	Yes	Yes	No	No

Note: If you do not see the `Package Supplier Product Services Info Custom` resource in the list of resources, use the Security Access Manager workbench of the Hub Console to change the resource status to secure.

Creating User Accounts

If some business users do not have MDM Hub user accounts, create the user accounts.

Before you begin, you might want to review an existing MDM Hub user account to see which authentication type is in use in the Informatica MDM environment.

1. In the Hub Console, in the Configuration workbench, click **Users**.
2. Acquire a write lock.
3. Click the **Users** tab.
4. Click **Add user**.

   The Users tool displays the **Add User** dialog box.
5. Enter a first, middle, and last name for the user.
6. Enter the user name for the user. This is the name entered when the user logs in to the Hub Console.
7. Enter the default database for the user, which is the Operational Reference Store that contains the supplier master data.
8. Enter and verify a password for the user.
9. Choose the type of authentication.
   - Select the **Use external authentication** check box if your MDM Hub implementation uses authentication through a third-party security provider.
   - Clear the **Use external authentication** check box if you want to use the internal authentication in the MDM Hub.
10. Click **OK**.

    The Users tool adds the user to the list of users on the **Users** tab.

Assigning Roles to Business Users

You need to assign the user roles to the business users who are responsible for reviewing applications and edited supplier profiles.

You use the Hub Console to assign user roles. You can follow either a role-first approach or a user-first approach. For a role-first approach, you select a role and then select the users and user groups that you want to associate with the role. For a user-first approach, you select a user or user group and then select roles.

When you connect to the Operational Reference Store, select **supplier_hub**.

1. In the Hub Console, connect to the Operational Reference Store that supports the IDD application.
2. Acquire a write lock.
3. Expand the **Security Access Manager** workbench and click **Users and Groups**.

   The Users and Groups tool opens. You can use a role-first approach, a user-first approach, or a mix to attach roles to users.
4. If you want to follow a role-first approach, click the **Assign Users/Groups to Role** tab.
   a. Select a workflow role.
   b. Click the **Edit** button.
   c. In the **Assign Users to Role** dialog box, select the users and user groups who should have this role.
   d. Click **OK**.
   e. Repeat for each workflow role.
5. If you want to follow a user-first approach, click the **Assign Roles to User/Group** tab.
   a. Select a user or user group.
   b. Click the **Edit** button.
   c. In the **Assign Roles to User** dialog box, select the workflow roles suitable for the user or user group.
   d. Click **OK**.
   e. Repeat for each user or user group who requires workflow roles.

Adding MDM-ActiveVOS Users to the Application Server

When you install and configure Multidomain MDM with the embedded ActiveVOS Server, you must set up container-based authentication in the application server and add a user.

Follow these steps to use the ActiveVOS workflow engine with the MDM Hub:

1. In the application server console, create a trusted user and assign the following roles to the user: abAdmin,abServiceConsumer,abTaskClient,abTrust.
2. To configure ActiveVOS to use MDM Identity Services, follow these steps:
   a. In the ActiveVOS console, select **Admin > Configure Services > Identity Services**.
   b. In the Provider Configuration section, enable the **Enable** check box and select **MDM** from the **Provider Type** list.
   c. On the Connection tab, enter the ActiveVOS workflow engine user password as the MDM connection settings password.
      The ActiveVOS workflow engine user is the user that you specified when you added the ActiveVOS workflow engine to the Workflow Manager tool in the MDM Hub Console.
   d. Click **Update**.
   e. Test the connection.
      a. Select the **Test** tab.
      b. In the **User for test** field, enter an ActiveVOS user name.
      c. Click **Test Settings**.

Mapping the Supplier Portal Roles to the MDM Hub Roles

Use the `RoleMappingSource.xml` file to map the roles.

The `RoleMappingSource.xml` file contains the mapping of external roles to internal roles in the Security Access Manager.

1. Go to the following directory:

   `<MDM installation directory>/app/tsr/userprofile-provider`

2. Copy the `RoleMappingSource.xml` file.
3. Navigate to the following directory:

   `<MDM installation directory>/hub/server/resources`

4. Paste the copied file.
5. If you imported the metadata from a change list, open the `RoleMappingSource.xml` file in an editor.
6. Change the value of the `<InternalRoleRowID>` property to match the ROWID of the Supplier Administrators role in the `C_REPOS_SAM_ROLE` table.
7. Save the file.

Configure the Hub for Informatica Product 360

When the environment includes Informatica Product 360, the MDM Hub manages user authentication among all the application components.

When a supplier uploads product catalogs from the Supplier 360 Supplier Portal to the Informatica Product 360 Supplier Portal, the MDM Hub handles user authentication between the Portals. A custom user profile provider maps the Supplier Portal user roles to the MDM Hub roles. A login provider authenticates Supplier Portal users with Informatica Product 360. The two providers are packaged in a bundle called `PIMLoginProvider.jar`.

Perform the following tasks:

- Copy the Product 360 instance details to MDM Hub server.
- Upload a security provider for Informatica Product 360.

Copying the Product 360 Instance Details to the MDM Hub Server

The `appconfig.properties` files of Supplier 360 contains details about the Product 360 instance. You must copy the appconfig.properties file to the MDM Hub Server installation directory.

The `appconfig.properties` file of Supplier 360 contains details about the Product 360 instance. You must copy the `appconfig.properties` file to the MDM Hub Server installation directory.

1. In a file explorer, navigate to the following directory:

   `<MDM installation directory>/app/tsr/userprofile-provider`

2. Copy the files `appconfig.properties`.
3. Navigate to the following directory:

   `<MDM installation directory>/hub/server/resources`

4. Paste the copied files into the directory.
5. Open the copied file `appconfig.properties` in an editor.
6. Set the `pim.url` property to the host name and the port number of the Informatica Product 360 Supplier Portal.

You can use the following format for the URL:

```
pim.url=http|https://<Host>:<Port>
```

The following sample URL uses the HTTPS protocol and 9090 as the port number:

```
pim.url=https://localhost:9090
```

7. Save the file.

Uploading the Security Provider for Informatica Product 360

The security provider for Informatica Product 360 provides security services, such as authentication and authorization, for users that access the MDM Hub. You upload the provider file from the Hub Console.

1. In the Hub Console, open the **Configuration** workbench and select **Security Providers**.
2. Acquire a write lock.
3. In the Security Providers tool, right-click **Provider File** and select **Upload Provider File**.
4. Navigate to the following directory:

   ```
   <MDM installation directory>/app/tsr/userprofile-provider
   ```

5. Select the `PIMLoginProvider.jar` file.
6. Click **Open**.

   The Security Provider tool populates the Providers list with the additional provider information. After you upload the provider file, you can remove the original file from the file system.
7. Exit the Hub Console.
8. Stop the application server.
9. Restart the application server.

Configure the Operational Reference Store

Before you start the Application, configure the Operational Reference Store that contains supplier data. You must diable a trigger, truncate the data in a repository table, and review the value of the GETLIST Limit property.

Truncating a Repository Table

If you imported the Oracle database dump, the repository table C_REPOS_RPT_DETAILS contains sample data. You must truncate the data.

1. In a database tool, connect to the Operational Reference Store for supplier data.
2. Run the following command:

   ```
   truncate table C_REPOS_RPT_DETAILS
   ```

Setting the Value of the GETLIST Limit Property

The GETLIST Limit property controls how many records a SIF search request returns. The default is 200. Set this value to 500 from the Appconfiguration user interface.

Note: If business users report missing addresses, try increasing the value of this property even more. The maximum value is 1000.

1. Launch Supplier 360:

   ```
   http://<MDM Server host name>:<MDM Server port number>/mdmapps/
   com.informatica.tools.mdm.web.auth/login
   ```

2. Log in with your user credentials.
3. If prompted to select an application, select **InfaSupplierMaster**.
4. Click **App Configuration**.
5. On the **Properties** tab, type the value 500 in the text box next to **Page Size**.
6. Click **Save Changes**.

Populate Supplier 360 Charts with Data

Supplier 360 contains a Start workspace and Entity 360 views. These pages contain charts with metrics or data about suppliers. The data for all charts come from a data mart.

The following diagram shows how the data mart works.

The data mart service retrieves data from the Operational Reference Store and stores the results in a repository table. When the Start workspace or an Entity 360 view loads, the page queries the data mart service for the data and populates the charts.

Note: In the data mart service and configuration files, the term *report* refers to the chart configuration.

To populate the charts, perform the following tasks:

1. Import the chart configurations into a repository table.
2. Configure a database connection between the data mart and the database that contains the Operational Reference Store.
3. Configure the report parameters to include the database name.
4. Populate the data mart with report data.

Chart Configurations for Supplier 360

Informatica MDM ships with predefined chart configurations for the data mart service. Supplier 360 adds chart configurations for supplier data that can be used to populate the charts in the Start page or in the Entity 360 views.

The following reports contain the chart configurations:

- Supplier By Region
- Documents By Expiry Date
- Supplier Onboarding Time
- Task By Status
- Task By Priority
- Supplier By Category
- Supplier Growth Trend

Importing the Chart Configurations

To import the chart configurations, run an insert script on the supplier_hub Operational Reference Store. The script imports the chart configurations into the repository table C_REPOS_RPT_CONFIG.

1. Open a command prompt.
2. Navigate to the following directory:

   ```
   <MDM installation directory>/app/tsr/datamart/chart-config
   ```

3. Use a database tool to run the `insert_c_repos_rpt_config.sql` script on the supplier_hub.

   For example, for sqlplus, log in with the Operational Reference Store user name and password and the service name. Then start the script.

   ```
   .../chart-config> sqlplus supplier_hub/password@service
   SQL> @insert_c_repos_rpt_config.sql
   ```

   The script inserts the charts into the repository table C_REPOS_RPT_CONFIG.

SUPPLIER_HUB | C_REPOS_RPT_CONFIG

Columns | Data | Constraints | Grants | Statistics | Triggers | Flashback | Dependencies | Details | Partitions | Indexes | SQL

Sort... Filter: Actions...

ROWID_RPT_CONFIG	LAST_UPDATE_DATE	UPDATED_BY	DIMENSION_NAME_1	DIMENSION_NAME_2	TIMEPERIOD_NAME	METRIC_NAME	RPT_NAME	RPT_DESC
15	15-MAY-14 02.55.30.000000000 PM	CMX	Insurance Status	(null)	(null)	Number Of Insurance	Insurance by Expiry Status	Insurance by Expiry Stat
16	02-FEB-15 06.42.23.000000000 PM	CMX	Document	(null)	Expiration Date	Number Of Supplier	Document By Expiry Date Monthly	Document By Expiry Date
17	02-FEB-15 06.44.35.000000000 PM	CMX	Supplier	Onboarding Dura...	(null)	Number Of Supplier	Supplier By Onboarding Duration	Supplier By Onboarding D
18	06-FEB-15 03.18.06.000000000 PM	CMX	Status	(null)	(null)	Number Of Supplier	Tasks- By Status	Tasks- By Status
19	06-FEB-15 03.18.06.000000000 PM	CMX	Priority	(null)	(null)	Number Of Supplier	Tasks- By Priority	Tasks- By Priority
1	28-APR-14 12.07.46.000000000 PM	CMX	Subject area	(null)	days	Number Of Records	MDM Subject Area Growth Trends	MDM Subject Area Growth
2	28-APR-14 12.07.46.000000000 PM	CMX	Subject area	Source System	(null)	Number Of Records	Source system Metrics	Source system Metrics
3	28-APR-14 12.07.46.000000000 PM	CMX	Subject area	Xref Composition	(null)	Number Of Xrefs	Xref Composition Metrics	Xref Composition Metrics
4	28-APR-14 12.07.46.000000000 PM	CMX	Subject Area	Create Date	(null)	Number Of tasks	Subject Area Tasks -By Crea...	Subject Area Tasks -By
5	28-APR-14 12.07.46.000000000 PM	CMX	Subject Area	Due Date	(null)	Number Of tasks	Subject Area Tasks - By Due ...	Subject Area Tasks - By
6	28-APR-14 12.07.46.000000000 PM	CMX	Subject area	Priority	(null)	Number Of tasks	Subject Area Tasks- By Prio...	Subject Area Tasks- By
7	28-APR-14 12.07.46.000000000 PM	CMX	Subject area	Status	(null)	Number Of tasks	Subject Area Tasks- By Status	Subject Area Tasks- By
8	28-APR-14 12.07.46.000000000 PM	CMX	Subject area	Task Type	(null)	Number Of tasks	Subject Area Tasks- By Task ...	Subject Area Tasks- By T
9	28-APR-14 12.07.46.000000000 PM	CMX	Subject area	(null)	(null)	Number Of tasks	Tasks- By Subject Area	Tasks- By Subject Area
10	28-APR-14 12.07.46.000000000 PM	CMX	Assignee	Priority	(null)	Number Of tasks	Assignee Tasks - By Priority	Assignee Tasks - By Prio
11	28-APR-14 12.07.46.000000000 PM	CMX	Assignee	Status	(null)	Number Of tasks	Assignee Tasks - By Status	Assignee Tasks - By Sta
12	19-FEB-14 02.21.26.000000000 PM	CMX	Country	State	(null)	Number Of Supplier	Supplier By Region Metrics	Supplier By Region Metri
13	21-APR-14 05.41.43.166000000 PM	CMX	Validation Message	(null)	(null)	Number Of Address	Address By Validation Metrics	Address By Validation Me
14	21-APR-14 05.41.43.166000000 PM	CMX	Contract Status	(null)	(null)	Number Of Contracts	Contracts by Expiry Status	Contracts by Expiry Stat

Configuring the Data Mart Database Connection

Before you can generate reports or populate charts, you must configure the data mart database connection.

1. Go to the following directory:

   ```
   <MDM installation directory>/app/tsr/datamart/lib
   ```

2. If the directory does not contain the following files, copy them from the `<MDM installation directory>/hub/server/lib` directory:
   - `log4j-1.2.16.jar`
   - `ojdbc7.jar`
   - `sqljdbc4.jar`. For Microsoft SQL Server.
   - `siperian-common.jar`
   - `commons-validator-1.4.0.jar`
3. At a command prompt, navigate to the following directory:

   `<MDM installation directory>/app/tsr/datamart`
4. Run the following command:

   ```
   java -jar populate_datamart.jar config
   ```
5. At the prompt, type C to configure the database connection.
6. Answer the prompts described in the following table:

Prompt	Description
Connection Name	Enter a unique name for the connection. If the name exists, it will be overwritten.
Type of Connection	Enter the type of connection to the data mart. Currently only DB is supported.
Database vendor	Enter the database to connect with, such as Oracle or IBM DB2 or MS SQL.
User	Enter the database user.
Password	Enter the database password.
Token	Reserved for future use
Host Name	Enter the database host name.
Port	Enter the database port.
Database Name	Enter the database name/SID.

7. When prompted to finish the configuration, enter Y.

   The tool saves the connection information to the `config/mart-population-config.xml` file.

Configuring Parameters

Before you can populate the data mart, you must configure the report parameters for the chart configuration.

You need information contained in other sources.

To find the report names, open the `config/report-class-mapping.properties` file.

To find the configuration IDs, open the C_REPOS_RPT_CONFIG table in a database tool.

1. Open a command prompt.
2. Navigate to the data mart directory.

   `<MDM installation directory>/app/tsr/datamart`

3. Run the following command:

```
java -jar populate_datamart.jar config
```

4. Type `P` to configure the report parameters.
5. Answer the prompts described in the following table:

Prompt	Description
Report Name	Specify a report name that appears the `report-class-mapping.properties` file.
Report Configuration ID	Enter the report configuration ID for the report as it appears in the C_REPOS_RPT_CONFIG table.
Mart Connection Name	Enter the connection name for connecting the data mart to an Operational Reference Store. Use the connection name that you defined for the Operational Reference Store that contains the supplier data.
Query Connection Name	Enter the connection name for the database to be queried. - For reports that include the word Tasks, specify the connection name that you defined for the ActiveVOS database. - For all other reports, specify the connection name that you defined for the Operational Reference Store that contains the supplier data.

6. When prompted to finish the configuration, enter N. Add the next table in the list.
7. After you enter all tables, exit the configuration tool.

   The tool saves the parameters to the `config/mart-population-config.xml` file.

Populating the Data Mart with Data

You run a java command to populate the data mart with data for all charts or for a specific chart. If you want to specify a chart, you need to use its report name.

1. Open a command prompt.
2. Run a java command to populate the data mart.
   - To populate the data mart with data for all available reports, run the following command:

     ```
     java -jar populate_datamart.jar
     ```

   - To populate the data mart with data for a specific report, run the following command:

     ```
     java -jar populate_datamart.jar exec <report name>
     ```

If the supplier_hub contains data, the C_REPOS_RPT_DETAILS repository table is populated with report data. The ROWID_RPT_CONFIG column links the data to the report configuration that requested the data.

SUPPLIER_HUB_COCS_202 × | SUPPLIER_HUB × | C_REPOS_RPT_DETAILS ×

Columns | Data | Constraints | Grants | Statistics | Triggers | Flashback | Dependencies | Details | Partitions | Indexes | SQL

Sort... | Filter: | Actions...

	ROWID_RPT_DETAILS	ROWID_RPT_CONFIG	CREATE_DATE	CREATOR	LAST_UPDATE_DATE	UPDATED_BY	DIMENSION_VALUE_1	DIMENSION_VALUE_2	TIMEPERIOD_VALUE	METRIC_VALUE
1	260002	14	23-APR-14 05.05.26.761000000 PM	CMX	23-APR-14 05.05.26.761000000 PM	CMX	Expired	(null)	(null)	1
2	260003	14	23-APR-14 05.05.26.886000000 PM	CMX	23-APR-14 05.05.26.886000000 PM	CMX	Expiring in next 15 days	(null)	(null)	1
3	260004	14	23-APR-14 05.05.26.902000000 PM	CMX	23-APR-14 05.05.26.902000000 PM	CMX	Expiring in next 45 days	(null)	(null)	1
4	260005	14	23-APR-14 05.05.26.917000000 PM	CMX	23-APR-14 05.05.26.917000000 PM	CMX	Expiring in next 30 days	(null)	(null)	2
5	260006	14	23-APR-14 05.05.26.933000000 PM	CMX	23-APR-14 05.05.26.933000000 PM	CMX	Effective end date not specified	(null)	(null)	2
6	280027	2	28-APR-14 12.50.01.052000000 PM	CMX	15-MAY-14 03.24.24.216000000 PM	CMX	Person	SYS0	(null)	22
7	280028	2	28-APR-14 12.50.01.114000000 PM	CMX	15-MAY-14 03.24.24.223000000 PM	CMX	Organization	SYS0	(null)	7
8	280029	2	28-APR-14 12.50.01.114000000 PM	CMX	25-AUG-14 12.33.58.031000000 PM	CMX	Household	SYS0	(null)	2
9	280031	3	28-APR-14 12.50.01.598000000 PM	CMX	15-MAY-14 03.24.24.538000000 PM	CMX	Person	singleton	(null)	22
10	280032	3	28-APR-14 12.50.01.629000000 PM	CMX	15-MAY-14 03.24.24.546000000 PM	CMX	Organization	singleton	(null)	7
11	280033	3	28-APR-14 12.50.01.645000000 PM	CMX	25-AUG-14 12.20.44.241000000 PM	CMX	Household	singleton	(null)	2
12	960494	2	28-APR-14 12.50.01.052000000 PM	CMX	28-APR-14 12.50.01.052000000 PM	CMX	Person	DNB	(null)	20
13	960495	2	28-APR-14 12.50.01.114000000 PM	CMX	28-APR-14 12.50.01.114000000 PM	CMX	Organization	DNB	(null)	10
14	960496	2	28-APR-14 12.50.01.114000000 PM	CMX	28-APR-14 12.50.01.114000000 PM	CMX	Household	DNB	(null)	2
15	960497	2	28-APR-14 12.50.01.052000000 PM	CMX	28-APR-14 12.50.01.052000000 PM	CMX	Person	ERP	(null)	25
16	960498	2	28-APR-14 12.50.01.114000000 PM	CMX	28-APR-14 12.50.01.114000000 PM	CMX	Organization	ERP	(null)	10
17	960499	2	28-APR-14 12.50.01.114000000 PM	CMX	28-APR-14 12.50.01.114000000 PM	CMX	Household	ERP	(null)	2
18	1140263	17	06-FEB-15 03.50.02.757000000 PM	CMX	06-FEB-15 05.28.25.581000000 PM	CMX	Supplier	less than 2 Weeks	(null)	1
19	1140264	18	06-FEB-15 03.55.17.759000000 PM	CMX	06-FEB-15 05.28.25.921000000 PM	CMX	Active	(null)	(null)	4
20	1140265	18	06-FEB-15 03.55.17.783000000 PM	CMX	06-FEB-15 05.28.25.929000000 PM	CMX	Completed	(null)	(null)	15
21	1140266	19	06-FEB-15 03.56.42.251000000 PM	CMX	06-FEB-15 05.28.26.173000000 PM	CMX	High	(null)	(null)	4
22	1140267	19	06-FEB-15 03.56.42.285000000 PM	CMX	06-FEB-15 05.28.26.183000000 PM	CMX	Normal	(null)	(null)	15
23	280042	1	15-MAY-14 03.18.52.039000000 PM	CMX	15-MAY-14 03.24.23.768000000 PM	CMX	Organization	(null)	04-30-2014	6
24	280043	1	15-MAY-14 03.18.52.086000000 PM	CMX	15-MAY-14 03.24.23.775000000 PM	CMX	Organization	(null)	05-12-2014	7
25	280044	1	15-MAY-14 03.18.52.103000000 PM	CMX	15-MAY-14 03.24.23.783000000 PM	CMX	Supplier	(null)	01-13-2014	2
26	280045	1	15-MAY-14 03.18.52.116000000 PM	CMX	15-MAY-14 03.24.23.789000000 PM	CMX	Supplier	(null)	01-14-2014	5
27	280046	1	15-MAY-14 03.18.52.128000000 PM	CMX	15-MAY-14 03.24.23.808000000 PM	CMX	Supplier	(null)	01-16-2014	6
28	280047	1	15-MAY-14 03.18.52.140000000 PM	CMX	15-MAY-14 03.24.23.812000000 PM	CMX	Supplier	(null)	01-17-2014	8
29	280048	1	15-MAY-14 03.18.52.158000000 PM	CMX	15-MAY-14 03.24.23.827000000 PM	CMX	Supplier	(null)	01-22-2014	9
30	280049	1	15-MAY-14 03.18.52.173000000 PM	CMX	15-MAY-14 03.24.23.832000000 PM	CMX	Supplier	(null)	01-29-2014	10
31	280050	1	15-MAY-14 03.18.52.188000000 PM	CMX	15-MAY-14 03.24.23.840000000 PM	CMX	Supplier	(null)	04-11-2014	20

Configure the ActiveVOS Email Service

The Application uses the email service available with the ActiveVOS Server. You need to enable the service and specify a mail server.

You configure the email service from the ActiveVOS Console. You can do this step now, while you are configuring the email templates, or you can configure the email service after you install the Application.

Mail Server Properties

When you enable the email service, you need to specify a mail server.

The following table describes the mail server properties that you need to set:

Property	Description
Host	Specify the mail server DNS name or IP address.
Port	Specify the port number to use for communications between the ActiveVOS server and the mail server. The default value is 25.
From Address	Specify the email address to display in the From field of an email. For example, no-reply@example.com.
Username	Specify the name used to log in to the mail server.
Password	Specify the password for the user name.
Security	Optional. Select a security protocol. If you set a security protocol, ensure that the Port you specified supports the protocol.

Configuring the ActiveVOS Email Service

You configure the ActiveVOS email service from the ActiveVOS Console.

If you do not know the location of the ActiveVOS Console or your log in credentials, contact your MDM Hub administrator.

1. Launch the ActiveVOS Console. In a browser, type the following URL, substituting the correct host name and port number:

   `http://[host]:[port]/activevos`

2. Log in to the ActiveVOS Console.
3. Click **Admin**.
4. Click **Configure Services**.
5. Click **Email Service**.
6. Select the **Enable** check box.
7. Specify the properties for your mail server.
8. Click **Update** to save your configuration or click **Update and Test** to save your configuration and send a test mail.

Configure the Product 360 Properties

If you configure Supplier 360 to support the Product 360 broker users, the broker users access the Supplier Portal of Product 360 when they log in to the Supplier Portal of Supplier 360. You can configure a URL to which you want to redirect the broker users when they log out of the Supplier Portal of Product 360 or reset their password.

You can configure the URL-related properties in the `configuration.properties` file located in the following directory: `<Product 360 Supplier Portal installation directory>/configuration`.

The following table describes the properties that you can configure in the `configuration.properties` file:

Property	Description
`logoutUrlActiveRoles`	List of user roles that you want to redirect to a URL when the users log out or their sessions time out. For example, `logoutUrlActiveRoles=ROLE_BROKER_USER,ROLE_SUPPLIER_ADMIN`
`logoutUrl`	URL to which you want to redirect the users when they log out or their sessions time out. For example, `logoutUrl=www.informatica.com`.
`resetPasswordRedirectTargetUrl`	URL to which you want to redirect the users when they reset their password. For example, `resetPasswordRedirectTargetUrl=www.informatica.com`.

Note: If you use SAML authentication, define the properties in the `SamlConfig.xml` file that you can find in the SAML configuration directory.

Configuring the Default Hierarchy

In the Supplier Dashboard view, the Hierarchies panel displays how a supplier is related to other suppliers or contacts in a hierarchical format. A supplier can belong to multiple hierarchies. If you define a default hierarchy for the hierarchy component, the Hierarchies panel loads the default hierarchy for the supplier. Otherwise, the Hierarchies panel loads the list of hierarchies to which the supplier belongs.

1. In the Provisioning tool, click **Configuration** > **Component Editor**.

   The **Component Editor** appears.

2. Select **LayoutHierarchyComponent** > **HierarchyComponent**.

   The **Properties** panel appears.

3. Edit the XML code as required.

   The following sample code sets Supplier Hierarchy as the default hierarchy:

```
<?xml version="1.0" encoding="UTF-8"?>
<hierarchyComponent
    xmlns="http://www.informatica.com/mdm/HierarchyComponent">
    <defaultHierarchyName>Supplier Hierarchy</defaultHierarchyName>
</hierarchyComponent>
```

4. Click **Apply**.

5. Publish the changes to the MDM Hub.

   a. Click **Publish**.

      A confirmation dialog box appears that prompts you to publish or review the changes.

   b. Review the changes or publish without a review.

      - To publish without a review, click **Publish**.
      - To publish after a review, click **Review Changes** and follow the instructions that appear on the screen.

Import the Localized Lookup Data

Supplier 360 installation files include the localized lookup data. If you use a localized environment, import the localized lookup data into the database before you use Supplier 360.

1. Copy the following files from the `<MDM installation directory>/hub/server/lib` directory to the `<MDM installation directory>/app/tsr/lookuplocalization/lib` directory:

   - `log4j-1.2.16.jar`
   - For Oracle. `ojdbc7.jar`
   - For IBM DB2. `db2jcc.jar`
   - For Microsoft SQL Server. `sqljdbc4.jar`

2. Go to the following directory:

   `<MDM installation directory>/app/tsr/lookuplocalization/bin`

3. Run the following command:

   - On UNIX. `./lookup_localization.sh`
   - On Windows. `lookup_localization.bat`

4. At the prompts, enter the following parameters:

Parameter	Description
Database type	Type of database that you use. Use one of the following values: - Oracle - DB2 - MSSQL
User name	User name to access the Operational Reference Store database.
Password	Password for the user name.
Operational Reference Store database host name	Name of the host that runs the Operational Reference Store database.
Operational Reference Store database port number	Port number that the database listener uses.
Database name	For IBM DB2 and Oracle only. Name of the IBM DB2 database or Oracle service.

The localized lookup data is imported into the staging tables.

5. In the Utilities workbench of the Hub Console, click **Batch Group**.
6. Expand **Localized Lookup Data Load**, and select **Control & Logs**.
7. Click **Execute**.

   The localized lookup data is imported into the base objects.

Configure the SOAP Service

Configure the SOAP service to validate supplier data before a supplier submits the data in the onboarding application.

1. Log in to the Provisioning tool and select the **supplier_hub** Operational Reference Store.
2. Click **Business Entity** > **Extensions**.
3. From the **Extensions** list, select **SOAP Services**, and then select **SOAPSupplierExternalService**.
4. In the **Endpoint** field, specify the host name and port number of the machine where you have installed the Supplier 360 application.

   If your environment is configured to use the HTTPS protocol, specify the network protocol as HTTPS in the URL.
5. Click **Apply**.
6. Publish the changes to the MDM Hub.
   a. Click **Publish**.

      A confirmation dialog box appears that prompts you to publish or review the changes.

b. Review the changes or publish without a review.

- To publish without a review, click **Publish**.
- To publish after a review, click **Review Changes** and follow the instructions that appear on the screen.

Configure the Browser Settings

If you use Internet Explorer version 11 to log in to Supplier 360, configure Internet Explorer to check the newer versions of stored pages when you visit a web page.

To configure Internet Explorer to check the newer versions of a stored web page, perform the following steps:

1. Open Internet Explorer.
2. Click the tools icon, and then click **Internet options**.

   The **Internet Option** dialog box appears.
3. On the **General** tab, under **Browsing history**, click **Settings**.

   The **Website Data Settings** dialog box appears.
4. Select **Every time I visit the webpage** and click **OK**.
5. Restart Internet Explorer.

Importing the Localized Metadata

If you use a localized environment, you can import the localized metadata of Supplier 360. Metadata provides additional information about data. For example, metadata for a Supplier business entity includes the supplier's first name, last name, business type, and business name.

1. In the Provisioning Tool, click **Configuration** > **General Settings.**

   The **General Settings** page appears.
2. Select **Metadata Localization**.
3. In the **Metadata Localization** panel, under **Metadata Bundle**, click **Import**.

4. Browse to the following directory:

   `<MDM installation directory>/app/tsr/hub/cocsconfig/`
5. Select the `besMetadata.zip` file, and then click **Open**.

   The localized metadata is imported.

Test the Supplier Portal

Verify that you can launch the Supplier Portal.

1. Open a supported browser.
2. Navigate to the following URL, substituting the host name and the port number:

   ```
   http://<host name>:<port>/supplierapp-war/com.informatica.mdm.supplier.auth/login
   ```

   The Supplier Portal opens and displays the images you added.
3. Click **Sign Up** and register a fictitious organization. Use your email address so that you receive the confirmation email.

   If the registration returns with an error, review your PIM system set up to check for problems.
4. If you want to test that the Create Supplier business process is working, complete an application form and submit it.

Test Supplier 360

You can log in to Supplier 360 with your administrative user credentials.

Note: The Start workspace contains the Task Inbox and charts. The charts are empty of data until your organization begins adding supplier profiles.

1. Launch Supplier 360:

   ```
   http://<MDM Server host name>:<MDM Server port number>/mdmapps/
   com.informatica.tools.mdm.web.auth/login
   ```
2. Log in with your user credentials.
3. If prompted to select an application, select **InfaSupplierMaster**.

   Supplier 360 launches and displays the Start workspace.

CHAPTER 6

Business Processes for Supplier Management

This chapter includes the following topics:

- Business Processes for Supplier Management Overview, 69
- Create a Supplier Process, 70
- Supplier Profile Change Approval Process, 71
- Delete a Supplier Internal Process, 72

Business Processes for Supplier Management Overview

Business processes automate some common supplier lifecycle management workflows.

The Application ships with ActiveVOS business processes for the following workflows:

- Create a supplier (initiated from the Supplier Portal)
- Create or update a supplier profile (initiated from Supplier 360)
- Delete a supplier (initiated from Supplier 360)

The following descriptions identify the purpose of each process and identifies the people activities within each process. To view the entire process, open the process in the ActiveVOS Console.

Create a Supplier Process

The `CreateSupplierProcess.bpel` defines a four-step approval process. The process begins when a supplier submits an online application.

The following diagram shows an overview of the process and highlights the people activities.

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

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

People Activity	Role Assigned	Possible Actions
Commodity Evaluation	CommodityManager	- Accepts the application. This action sends the application onto the Credit Evaluation step. - Rejects the application. This action deletes the pending record containing the changes. - Disclaims the task with an explanation so that someone else can claim it.
Credit Evaluation	FinanceManager	- Accepts the application. This action sends the application onto the Contract Evaluation step. - Rejects the application with explanation. This action sends the application back to the Commodity Evaluation step. - Disclaims the task with an explanation so that someone else can claim it.
Contract Evaluation	ContractManager	- Accepts the application. This action sends the application onto the Risk Evaluation step. - Rejects the application with explanation. This action sends the application back to the Commodity Evaluation step. - Disclaims the task with an explanation so that someone else can claim it.
Risk Evaluation	ComplianceManager	- Approves the application. This action applies the changes to the master data. - Rejects the application with explanation. This action sends the application back to the Commodity Evaluation step. - Disclaims the task with an explanation so that someone else can claim it.

Supplier Profile Change Approval Process

The default change approval process is a four-step process. The process begins when a business manager creates or edits a supplier profile.

The following diagram shows an overview of the process and highlights the people activities.

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

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

People Activity	Role Assigned	Possible Actions
Commodity Evaluation	CommodityManager	- Accepts the update. This action sends the update onto the Credit Evaluation step. - Rejects the update. This action deletes the pending record containing the changes. - Disclaims the task with an explanation so that someone else can claim it.
Credit Evaluation	FinanceManager	- Accepts the update. This action sends the update onto the Contract Evaluation step. - Rejects the update with explanation. This action sends the update back to the Commodity Evaluation step. - Disclaims the task with an explanation so that someone else can claim it.
Contract Evaluation	ContractManager	- Accepts the update. This action sends the update onto the Risk Evaluation step. - Rejects the update with explanation. This action sends the update back to the Commodity Evaluation step. - Disclaims the task with an explanation so that someone else can claim it.
Risk Evaluation	ComplianceManager	- Approves the update. This action applies the changes to the master data. - Rejects the update with explanation. This action sends the update back to the Commodity Evaluation step. - Disclaims the task with an explanation so that someone else can claim it.

Delete a Supplier Internal Process

The `DeleteSupplierProcess.bpel` defines a one-step approval process. The process begins when a business manager deletes a supplier profile.

The following diagram shows an overview of the process and highlights the people activity.

When an internal user attempts to delete a supplier profile, the action is sent to a commodity manager to review.

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

People Activity	Role Assigned	Possible Actions
Commodity Evaluation	CommodityManager	- Accepts the deletion. This action deletes the supplier profile and notifies the supplier. - Rejects the deletion. This action preserves the supplier profile and notifies the supplier that the deletion was rejected. - Disclaims the task with an explanation so that someone else can claim it.

CHAPTER 7

Customizing Supplier 360

This chapter includes the following topics:

- Customizing Supplier 360 Overview, 73
- Extending the Data Model, 73
- Extending the Business Entities and Business Entity Views, 75
- Customize Edit Privileges for Supplier Profile Pages, 75
- Customizing or Creating a Chart, 78
- Localizing Supplier 360, 84

Customizing Supplier 360 Overview

After you configure the Application, you can customize some of the features to better suit your environment. After you customize items, you need to rerun the setup script.

The customization includes extending the data model and customizing the edit privileges for the Supplier Portal pages. If you want to customize other elements of the Application, contact your Informatica representative.

Extending the Data Model

You can extend the Supplier 360 data model by changing the physical schema or by adding types and values to some of the existing tables. You can also add new tables and attributes.

To extend the data model, perform the following steps:

1. Compare your business requirements with the existing schema.
2. List the tables and columns that you want to add.
3. Take a backup of the existing schema.
4. Review the guidelines to extend the data model.
5. Add the tables and columns.

Guidelines for Extending the Data Model

You can modify the definitions of tables or add new tables to the database.

Consider the following guidelines when you extend the data model:

- Check if you can use an existing child base object.
- Do not add a root base object to store the person or organization information.
- Do not define tables with names greater than 24 characters.
- Do not delete existing base objects.
- Do not delete existing columns.
- Do not modify the physical names of existing base objects. However, you can modify the display names.
- Do not modify the data type of an existing column.
- Do not decrease the length of an existing column.
- Prefix the names of the new base object tables to distinguish the tables from the existing tables. The prefix indicates the type of table. Use the following naming convention when you create a base object:

Prefix	Table
`C_XO_`	Root or child record base object.
`C_XR_`	Relationship base object.
`C_XT_`	Lookup base object.

- If you add a column to an existing table, prefix the name of a column with `X_`.

For more information about adding tables and columns, see the *Multidomain MDM Configuration Guide*.

Guidelines for Adding Base Objects

You can add base objects to extend the data model. You can add root or child base objects, lookup base objects, and relationship base objects.

Consider the following guidelines when you add a base object table:

- **Child base object with one-to-many relationship**. Add a Party Role foreign key in the table to relate the table to the Party Role table.
- **Child base object with many-to-many relationship**. Use the relationship base object to relate the table to the Party Role table.
- **Lookup base object**. Set the `LookupIndicator` to true.

Extending the Business Entities and Business Entity Views

You can add a business entity or a lookup business entity. You can add a child, field, or reference fields to an existing business entity. You can add a business entity view for an existing business entity. You can create a business entity, and then add a business entity view.

Guidelines for Extending the Supplier 360

When you extend the Supplier 360 resources, follow the naming guidelines so that you can distinguish the custom resources from the predefined Supplier 360 resources.

The following table lists the naming guidelines for different Supplier 360 resources:

Resource	Guidelines
Business entity and business entity view	- Add the prefix `Ex` to the names of the new business entities or lookup entities. For example, `Ex<Business Entity Name>`. - Add the prefix `Ex` to the names of the new child, field, or reference field. For example, `Ex<Business Entity Child Name>`. - Do not add a new view to an existing business entity. Create a new business entity, and then add the business entity view.
Relationship type, queries, packages hierarchy, and hierarchy code	Add the prefix `X`.
Staging tables	Add the prefix `C_X`.
Business entity relationships, transformations, business entity service extensions, and component instances, such as layouts and external links	Add the prefix `Ex`.

Customize Edit Privileges for Supplier Profile Pages

For the Supplier Portal, you control the pages that can be edited by supplier representatives and at what stage. For example, you can choose to make some pages not editable in an approved supplier profile. For the pages that remain editable, suppliers decide which of their representatives is responsible for editing the editable pages.

When you make a page non-editable, a supplier must contact a business manager to make changes on behalf of the supplier. For example, if Finance Managers want to know when approved suppliers need to update banking information, you make the Bank page non-editable. Then, when this information requires an update, a supplier representative contacts the Finance Manager. The Finance Manager updates the banking information.

Page edit privileges are controlled through MDM Hub user roles. Supplier Portal user roles are controlled through the Contacts page. When a supplier representative with the appropriate role edits a page and submits the change, the MDM Hub updates the master data.

Default Page Privileges

By default, all Supplier Portal pages are editable during the application process and all pages are non-editable while the application is under review. After a supplier is approved, some pages are editable and some are non-editable.

The following table lists all the Supplier Portal pages and summarizes when each page is editable:

Supplier Portal Page	Editable While Filling Out the Online Application Form (Registered)	Editable While the Application is Under Review (Submitted)	Editable in the Approved Supplier Profile (Approved)
General Information	Yes	No	Yes
Additional Information	Yes	No	Yes
Products and Services	Yes	No	Yes
Tax	Yes	No	Yes
Bank	Yes	No	Yes
Insurance	Yes	No	Yes
Certificates	Yes	No	Yes
References	Yes	No	Yes
Sub Suppliers	Yes	No	Yes
Product Related Questions	Yes	No	Yes
Documents	Yes	No	Yes
Contacts	Not available	No	Yes

Page User Roles and Edit Privileges

You control edit privileges on a page by associating the page with a user role. A page can be in one of three stages, based on the status of the supplier application. You can set a different user role for each combination of page and application status.

Each page has the following possible application statuses:

- Registered. The page is being used as part of the supplier application.
- Submitted. The completed application form is under review by business user.
- Approved. The supplier is approved and the page is now part of the supplier profile.

For page and status, you can assign one of the following page user roles:

- Supplier Administrators. This role makes a page editable by supplier representatives with the Supplier Portal Admin User role and viewable by all supplier representatives.
- Supplier Users. This role makes a page non-editable for all supplier representatives. The page is viewable by all supplier representatives.

For example, if you want the Contacts page to be editable only after the application is approved, you assign the Contacts page with the Approved status to the Supplier Administrators role. You can leave the other

statuses for this page undefined. When a page status is undefined, the page is treated as if you assigned the Supplier Users role.

Supplier Portal User Roles and Edit Privileges

Suppliers control which supplier representatives have edit privileges by assigning Supplier Portal user roles.

The Supplier Portal user roles grant different privileges to supplier representatives:

- Admin User. This role grants edit privileges on all editable pages and view privileges on all non-editable pages.
- Supplier Portal User. This role grants view privileges on all pages.

After business users approve a supplier, the supplier representative who filled out the supplier application form is assigned the Admin User role. This authorized supplier representative can log in to the Supplier Portal and add additional supplier contact names on the Contacts page. Each contact receives access to the Supplier Portal. On the Contacts page, the supplier representative assigns the contact a user role by selecting Supplier Portal User or Admin User.

The following image shows the Contacts page with the Supplier Portal User selected.

<resource> Attributes

In the `appConfig.xml` file, under `<appSecurity>`, the element `<editableResources>` contains definitions for the Supplier Portal pages that you want to be editable. Each page is defined within a `<resource>` element.

The following table describes the attributes that you can use within the `<resource>` element:

Attribute	Value	Description
resourceId	*Page identifier*	Identifies the Supplier Portal page. Specify one of the following IDs: - `GENERALINFO` - `ADDITIONALDETAILS` - `PRODUCTSANDSERVICES` - `TAX` - `INSURANCE` - `REFERENCES` - `SUBSUPPLIERS` - `PRODUCTQUESTIONS` - `DOCUMENTS` - `CONTACTS`
appStatus	*Status identifier*	Identifies the status of the supplier application. Specify one of the following statuses: - `Registered`. The application is being created. - `Submitted`. The application is under review by business users. - `Approved`. The supplier is approved and has access to the supplier profile.

Editing Page Privileges

You can define which pages are editable and at what stages. Any given page can have different edit privileges at different stages.

You need to edit the `app-config.xml` file to customize page privileges.

1. In a database tool that supports the BLOB data type, open the table C_REPOS_APP_CONFIG.
2. In the CONFIG_TYPE column, find the row that contains `APP_CONFIG`.
3. In the CONFIG_DATA column, download the `app-config.xml` file.
4. Open the `appConfig.xml` file in an XML editor.
5. Add or edit the `resource` properties.
6. Save the file.
7. In the CONFIG_DATA column, upload the edited XML file.

Customizing or Creating a Chart

The Home page displays charts that are predefined for Supplier 360. You can customize a chart to change the chart characteristics or the information the chart shows. You can also create charts and add them to the Home page.

Customizing a Chart

Use the Highcharts project to customize a chart. You can change the chart type, the chart coordinates, and the chart characteristics, such as color, font, and labels.

Supplier 360 installation files include the Highcharts projects for the following predefined charts:

- Suppliers By Category
- Supplier Added By Year
- Source System Metrics
- Supplier Onboarding Time

You can access these projects and customize the charts based on your requirement. To customize other charts, manually create the charts in the Highcharts editor and then save the chart as a Highcharts project.

To customize a chart, perform the following tasks:

1. Open the Highcharts editor.
2. Customize the chart in the Highcharts editor.
3. Add the customized chart to the Home page.

Opening the Highcharts Editor

Supplier 360 installation files include a customized version of the Highcharts editor that you can use to customize the charts.

1. Go to the following directory:

   `<MDM installation directory>/app/tsr/reporting/highcharts-editor`
2. Based on the operating system, select a .zip file, and extract the files.
3. Open a command prompt, and go to the directory that contains the extracted files.
4. Run the following command:
   - On UNIX. `./mdm-highcharts-editor`
   - On Windows. `mdm-highcharts-editor.exe`

   The Highcharts editor opens.

Customizing a Chart in the Highcharts Editor

After you customize a chart, the Highcharts editor generates the code for the chart. Use the code in the Provisioning tool when you update the external component of the chart.

1. In the **Start** page of the Highcharts editor, click the **Settings** icon, and then select **Load Project**.
2. Browse to the project file, and click **Open**.

   You can find the project files in the following directory: `<Highcharts directory>/resources/app/OOTB-Charts`
3. Click the **Next** icon.

   The **Import** page displays the preview of the chart and the configuration of the chart in the JSON format.
4. To update the chart configuration, perform one of the following tasks:
   - Select appropriate coordinates.

     Note: When you change the coordinates, the Highcharts editor resets the chart properties, so change the coordinates with caution. To retrieve the chart properties, load the project again.

- Update the JSON, and click **Apply**.

The preview of the chart reflects the changes.

5. Click the **Next** icon.

   The **Select Chart** page appears.

6. To change the chart type, select the type of chart that you want to use.
7. Click the **Next** icon.

   The **Customize** page appears.

8. Based on your requirement, customize the chart properties.

   For information about any property, click the help icon of the property.

9. Click the **Next** icon.

   The **Export** page appears and displays the chart code.

10. To save the chart code as a Highcharts project, perform the following tasks:
    a. Click the **Settings** icon, and then select **Save Project**.
    b. Browse to the location where you want to save the project.
    c. Specify a name for the project, and then click **Save**.
11. To export the chart code as a .txt file, perform the following tasks:
    a. Click **Export Code**.
    b. Browse to the location where you want to save the .txt file.
    c. Specify a name for the file, and then click **Save**.

Adding the Customized Chart to the Home Page

After you generate the chart code in the Highcharts editor, create an external resource component in the Provisioning tool for the customized chart. You can then replace the existing chart in the Home page layout with the customized chart.

1. In the Provisioning tool, click **Configuration** > **Component Editor**.

   The **Component Editor** appears.

2. In the **Components** list, select **External Resources**, and click **Create**.

   The **Properties** panel appears.

3. Specify a name for the chart.
4. Add the chart code generated from the Highcharts editor.
5. Click **Apply**.
6. Click **Configuration** > **Layout Designer**.

   The **Layout Designer** appears.

7. Expand the **Start Page** layout category, and then select **layout1**.
8. Click **Edit**.

   The **Design** page appears.

9. Drag the external resource that you created for the chart into the workspace.
10. Delete the external resource component of the chart that you customized.
11. Drag the external resource component of the customized chart into workspace.
12. Click **Save**.

The changes are saved to the temporary workspace.

13. Publish the changes to the MDM Hub.
    a. Click **Publish**.

       A confirmation dialog box appears that prompts you to publish or review the changes.
    b. Review the changes or publish without a review.
       - To publish without a review, click **Publish**.
       - To publish after a review, click **Review Changes** and follow the instructions that appear on the screen.

Creating a Chart

If the Highcharts projects file is not available for a chart or you want a new chart, create the chart in the Highcharts editor. After you create the chart, you can save the chart as a Highcharts project. In future, you can use the project to customize the chart.

1. Define the chart configuration in the C_REPOS_RPT_CONFIG repository table.
2. Extend the data mart service for the chart.
3. Map the chart name to the class that you create to extend the data mart service in the `report-class-mapping.properties` file.
4. Configure the chart parameters.
5. Open the Highcharts editor.
6. Create the chart in the Highcharts editor.
7. Add the chart to the Home page.

Defining the Chart Configuration

Define the chart configuration in the C_REPOS_RPT_CONFIG repository table. Access the repository table, and insert the details of the chart, such as report configuration ID and coordinates.

Extending the Data Mart Service

Supplier 360 stores data for the charts in the C_REPOS_RPT_DETAILS repository table. To use the data mart service to load data into the repository table, extend the data mart service to include the chart defined in the C_REPOS_RPT_CONFIG repository table.

Supplier 360 installation files include the source code to extend the data mart service as a Java project. You can find the Java project file in the following directory: `<MDM installation directory>/app/tsr/datamart/source/SupplierDataMart`

To extend the data mart service, create a class for the chart and extend the ReportPopulationService class.

Configure a Database Connection for Data Mart

After you extend the data mart service, add an entry in the `report-class-mapping.properties` file to map the chart name with the class that you created for the chart.

You can find the `report-class-mapping.properties` file in the following directory: `<MDM installation directory>/app/tsr/datamart/config`

Configuring the Chart Parameters

After you map the chart name with the data mart class name, map the chart name with the report configuration ID defined in the C_REPOS_RPT_CONFIG repository table.

1. Open a command prompt, and go to the following directory:

   `<MDM installation directory>/app/tsr/datamart`

2. Run the following command:

   ```
   java -jar populate_datamart.jar config
   ```

3. Type **P**, and press **Enter**.
4. Enter appropriate values for the chart.

   The following table lists the parameters to configure for the chart:

Prompt	Description
Report Name	Name of the chart as specified in the following file: `/app/tsr/datamart/config/report-class-mapping.properties`
Report Configuration ID	Unique chart identifier as specified in the C_REPOS_RPT_CONFIG repository table.
Mart Connection Name	Connection name for the data mart to connect with the Operational Reference Store. Use the connection name defined for the Operational Reference Store that contains the supplier data.
Query Connection Name	Connection name for the database to be queried. - For reports that include the word Tasks, specify the connection name defined for the ActiveVOS database. - For all other reports, specify the connection name defined for the Operational Reference Store that contains the supplier data.

5. When prompted to finish the configuration, enter **Y**.

   The parameters are saved in the following file: `<MDM installation directory>/app/tsr/datamart/config/mart-population-config.xml`.

Opening the Highcharts Editor

Supplier 360 installation files include a customized version of the Highcharts editor that you can use to customize the charts.

1. Go to the following directory:

   `<MDM installation directory>/app/tsr/reporting/highcharts-editor`

2. Based on the operating system, select a .zip file, and extract the files.
3. Open a command prompt, and go to the directory that contains the extracted files.
4. Run the following command:
   - On UNIX. `./mdm-highcharts-editor`
   - On Windows. `mdm-highcharts-editor.exe`

   The Highcharts editor opens.

Creating a Chart in the Highcharts Editor

If the Highcharts project file is not available for a chart, create the chart in the Highcharts editor. Before you create the chart, ensure that you define the chart configuration in the C_REPOS_RPT_CONFIG repository table.

1. In the **Start** page of the Highcharts editor, click the **Settings** icon, and then select **New Chart**.

   The **Import** page appears.
2. Specify the URL to access the MDM Hub.

   Use the following format for the URL:

   ```
   https://<Host name>:<Port>[/<Tenant>]
   ```
3. Enter the user credentials to access the Operational Reference Store.
4. Enter the Operational Reference Store name of Supplier 360.
5. Enter the report configuration ID of the chart that you plan to create.

   You can find the report configuration ID of the charts in the C_REPOS_RPT_CONFIG table.
6. Click **Import Configuration**.

   The **Import** page displays the preview of the chart and the configuration of the chart in the JSON format.
7. To update the chart configuration, perform one of the following tasks:
   - Select appropriate coordinates.
   - Update the JSON, and click **Apply**.

   The preview of the chart reflects the changes.
8. Click the **Next** icon.

   The **Select Chart** page appears.
9. Select the type of chart that you want to use.
10. Click the **Next** icon.

    The **Customize** page appears.
11. Based on your requirement, configure the chart properties.

    For information about any property, click the help icon of the property.
12. Click the **Next** icon.

    The **Export** page appears and displays the chart code.
13. To save the chart code as a Highcharts project, perform the following tasks:
    a. Click the **Settings** icon, and then select **Save Project**.
    b. Browse to the location where you want to save the project.
    c. Specify a name for the project, and then click **Save**.
14. To export the chart code as a .txt file, perform the following tasks:
    a. Click **Export Code**.
    b. Browse to the location where you want to save the .txt file.
    c. Specify a name for the file, and then click **Save**.

Adding a Chart to the Home Page

You can add a chart to the Home page of Supplier 360. To add a chart, create an external resource component for the chart, and then add the component to the Home page layout.

1. In the Provisioning tool, click **Configuration** > **Component Editor**.

   The **Component Editor** appears.
2. In the **Components** list, select **External Resources**, and click **Create**.

   The **Properties** panel appears.
3. Specify a name for the chart.
4. Add the chart code generated from the Highcharts editor.
5. Click **Apply**.
6. Click **Configuration** > **Layout Designer**.

   The **Layout Designer** appears.
7. Expand the **Start Page** layout category, and then select **layout1**.
8. Click **Edit**.

   The **Design** page appears.
9. Drag the external resource that you created for the chart into the workspace.
10. Click **Save**.

    The changes are saved to the temporary workspace.
11. Publish the changes to the MDM Hub.
    a. Click **Publish**.

       A confirmation dialog box appears that prompts you to publish or review the changes.
    b. Review the changes or publish without a review.
       - To publish without a review, click **Publish**.
       - To publish after a review, click **Review Changes** and follow the instructions that appear on the screen.

Localizing Supplier 360

All elements of the user interface in Supplier 360 are localized in the supported languages. You can localize the Supplier 360 resources and custom resources in a language other than the supported languages. The Supplier 360 resources are menus, buttons, navigation links, labels, error messages, and metadata. The custom resources are the business entities, business entity fields, lookup tables, error messages, and labels that you add to customize Supplier 360.

Localizing Metadata

The business entity metadata refers to the resources related to the data model, such as business entity names, menu names, field names, and task types.

1. In the Provisioning tool, click **Configuration** > **General Settings.**
2. Select **Metadata Localization**.

3. Click **Metadata Localization**.

   The **Tree View** and **Metadata Localization** panels display the localization options.

4. In the **Metadata Localization** panel, under **Metadata Bundle**, click **Create Template**.
5. Save the `besMetadata.zip` file to a location on your local drive.
6. Extract the `besMetadata.zip` file to your local drive.

   The properties files for the selected languages appear.
7. If you want to add a language other than the supported language, save a copy of the `besMetadata.properties` file with the corresponding language code and country code.
   For example, to create the Canadian French version, save the file as `besMetadata_fr_CA.properties`.
8. In a text editor, open the corresponding localized file.
9. For each metadata value, add the localized value in the following format:

   ```
   <Metadata value>=<Localized value>
   ```

   For example, the following property shows a French translated value for the first name:

   ```
   Person.firstName=prénom
   ```
10. Save the changes.
11. Compress the localized properties files to a .zip file named `besMetadata`.
12. In the **Metadata Localization** panel, under **Metadata Bundle**, click **Import**, and then browse to the `besMetadata.zip` file.
13. Click **Open**.

    The language metadata bundle is imported.

Localizing Task Actions, Types, and Messages

Task actions, task types, and task action messages are part of the metadata. Define the task metadata in the `besMetadata.properties` file.

1. In the **Metadata Localization** panel, under **Metadata Bundle**, click **Export**. The `besMetadata.zip` template file downloads.
2. Unzip the file, and open the `besMetadata.properties` file in an editor of your choice.
3. Add the task action and task action message properties. Edit the task type properties.

Use the following syntax for the task properties:

Property Type	Syntax	French Localization Example
Task action	`taskaction.<Task action>=<Localized task action>`	`taskaction.Cancel_Task=Annuler la tâche` **Note:** Replace white spaces in task action names with an underscore. In the example, the white space in `Cancel Task` is replaced with an underscore, `Cancel_Task`.
Task type	`tasktype.<Task type>=<Localized task type>`	`tasktype.AVOSBeMerge=Fusionner` **Note:** To know which task name to add, you must be aware of the predefined MDM workflows that are deployed to the ActiveVOS server as processes.
Task action message	`taskactionmessage.<Task action configuration>.<Task action>=<Localized message>`	`taskactionmessage.TypicalConfig.Escalate=Vous êtes sur le point de transmettre la tâche à votre responsable.`

4. Save the properties file with the appropriate language code and country code suffix.

   For example, to localize metadata in Canadian French, the language code is `fr` and the country code is `CA`. Save the file as `besMetadata_fr_CA.properties`.
5. Compress the properties file.
6. In the **Metadata Localization** panel, under **Metadata Bundle**, click **Import**. The `besMetadata.zip` template file is imported.

Localizing Lookup Table

A lookup table is a reference table that contains a list of supported values for a column in a base object table. You can localize the lookup tables in any language you want. To localize the lookup tables, create a properties file with the localized values, and then import the localized file into the database.

1. Go to the following directory:

   `<MDM Installation Directory>/app/tsr/lookuplocalization/resources`
2. Save a copy of the `lookup.properties` file with the language code and country code for the language you want to use.
   For example, to create the Canadian French version, save the file as `Lookup_fr_CA.properties`.
3. In a text editor, open the localized file you create.
4. For each lookup table value, add the localized value in the following format:
   `<lookup table value>=<Localized value>`
5. Save the file.
6. Go to the following directory:

   `<MDM Installation Directory>/server/lib`

7. Copy the following files:
   - `log4j-1.2.16.jar`
   - `ojdbc7.jar`. If you use Oracle database.
   - `db2jcc.jar`. If you use IBM DB2 database.
   - `sqljdbc4.jar`. If you use Microsoft SQL Server database.
8. Paste the copied files into the following directory:

   `<MDM Installation Directory>/app/tsr/lookuplocalization/lib`
9. Open a command prompt, and go to the following directory:

   `<MDM Installation Directory>/app/tsr/lookuplocalization/bin`
10. Run the following command:
    - On UNIX. `lookup_localization.sh`
    - On Windows. `lookup_localization.bat`
11. At the prompts, enter the following parameters:

Parameter	Description
Database type	Type of database that you use. Use one of the following values: - Oracle - DB2 - MSSQL
User name	User name to access the Operational Reference Store database.
Password	Password for the user name.
Operational Reference Store database host name	Name of the host that runs the Operational Reference Store database.
Operational Reference Store database port number	Port number that the database listener uses.
Database name	For IBM DB2 and Oracle only. Name of the IBM DB2 database or Oracle service.

    The localized lookup data is imported into the staging tables.
12. In the utilities workbench of the Hub Console, click **Batch Group**.
13. Expand **Localized Lookup Data Load**, and select **Control & Logs**.
14. Click **Execute**.

    The localized lookup data is imported into the base objects.

Mapping the Lookup Tables with the Localized Lookup Tables

All lookup tables support localization. To localize lookup tables, you must map the lookup table to the corresponding lookup localization table. For example, to localize a list of gender codes, map the Lookup Gender lookup table to the Lookup Gender Localized table.

1. In the Provisioning tool, click **Business Entity** > **Modelling.**

   The **Modelling** page appears.

2. Select **Reference Entities**, and then select a lookup entity reference to localize.
   For example, select **LookupGender.**

3. In the properties panel, select **C_BT_GNDR** from the **Base Object** list.

4. Select **Localization**.

   Additional database properties and values appear based on your database table setup.
   The following table contains example values for the properties related to the C_BT_GNDR_LCL localized table:

Property	Value
Base Object	C_BT_GNDR_LCL
Key Column	GNDR_CD
Country Column	CNTRY_CD
Language Column	LANG_CD
Value Column	LOC_STRNG

   Note: When you localize lookup tables, do not configure the same table column as key and value columns. The value column displays the localized value.

5. Publish the changes to the MDM Hub.

   a. Click **Publish**.

      A confirmation dialog box appears that prompts you to publish or review the changes.

   b. Review the changes or publish without a review.

      - To publish without a review, click **Publish**.
      - To publish after a review, click **Review Changes** and follow the instructions that appear on the screen.

Localizing Labels and Error Messages

Labels and error messages are the static texts in the Supplier 360 and Provisioning tool user interface. The text cannot be localized through the Provisioning tool interface. To localize the labels and error messages, edit the Supplier 360 localization bundle files.

1. Go the following directory:

   ```
   <MDM Installation Directory>/app/tsr
   ```

2. Copy the following files:
   - `mdmappsview-ear.ear`
   - `provisioning-ear.ear`
   - `uiwebapp-ear.ear`
3. Paste the copied files into the following directory:

   `<MDM Installation Directory>/app/tsr/localizationScript`
4. Open a command prompt, and go to the following directory:

   `<MDM Installation Directory>/app/tsr/localizationScript`
5. Run the following command:

   `ant extract_all`

   The command extracts the i18n directories containing the localized bundle files for the user interface of Supplier 360 and Provisioning tool.
6. If you want to add a language other than the supported language, go to the following directories, and then save a copy of the `bundle.properties` files in the respective directories with the corresponding language code and country code:
   - `<MDM Installation Directory>/app/tsr/localizationScript/i18n/e360/com.informatica.tools.mdm.client/res/i18n` . For localizing the user interface of the Supplier 360 application.
   - `<MDM Installation Directory>/app/tsr/localizationScript/i18n/uiwebapp`. For localizing the user interface of the Supplier 360 components.
   - `<MDM Installation Directory>/app/tsr/localizationScript/i18n/provisioning`. For localizing the user interface of the Provisioning tool.

   For example, to create the Canadian French version, save the file as `bundle_fr_CA.properties`.
7. In a text editor, open the corresponding localized bundle files, and then update it.
8. From the command prompt, run the following command:

   `ant generate_all`

   The command generates the JavaScript/JSON files for the bundle files.
9. To update the .ear files with the updated localization bundle files, from the command prompt, run the following command:

   `ant update_all`
10. Copy the updated .ear files from the `<MDM Installation Directory>/app/tsr/localizationScript` directory, and then paste the files in the following directory:

    `<MDM Installation Directory>/app/tsr`
11. To localize error messages, user interface labels of external links, and other components on Supplier Dashboard, go to the following directories:
    - `<MDM Installation Directory>/app/tsr/resources/com.informatica.tools.mdm.web.entity360view.childlist`
    - `<MDM Installation Directory>/app/tsr/resources/com.informatica.tools.mdm.web.entity360view.coview.datacomponent`
    - `<MDM Installation Directory>/app/tsr/resources/com.informatica.tools.mdm.web.entity360view.documentlist`
    - `<MDM Installation Directory>/app/tsr/resources/com.informatica.tools.mdm.web.entity360view.externallink`.

12. Add the localized string to the corresponding `bundle.properties` file.
13. Save the file.
14. Go to the following directory:

    `<MDM Hub installation directory>/app/tsr/bin`
15. To deploy the updated `bundle.properties` files, run the following command:
    - On Windows. `install-tsr.bat`
    - On UNIX. `install-tsr.sh`
16. At the prompts, enter the following parameters:

Parameter	Description
MDM Hub installation directory	Press Enter to use the default path or type the fully-qualified path to the directory where you installed Informatica MDM Hub.
MDM Supplier 360 Application installation directory	Press Enter to use the default path or type the fully-qualified path to the directory that contains the application files.
Application Server	Type the name of the application server in lowercase.
Application to deploy	Type `tsr`.
avos console username	Type the ActiveVOS Console username.
avos console password	Type the ActiveVOS Console password.

CHAPTER 8

Troubleshooting

This chapter includes the following topics:

- Troubleshooting the Supplier 360 Upgrade Issues, 91
- Troubleshooting the Supplier Portal Issues, 91
- Troubleshooting the Supplier 360 Issues, 92

Troubleshooting the Supplier 360 Upgrade Issues

If you encounter any issues when you upgrade Supplier 360, use the following information to troubleshoot the issues.

The Supplier 360 upgrade fails in a JBoss environment.

In JBoss environments, the upgrade might fail due to a failed deployment of the `supplierexternalcall.war` file. To verify the failed deployment of the `supplierexternalcall.war` file, check the `server.log` file of JBoss.

If the deployment of `supplierexternalcall.war` file fails, perform the following steps:

1. Go to the following Directory:
   `<JBoss installation directory>/jboss-eap-6.4/standalone/configuration/`
2. Open the `standalone-full.xml` file in a text editor.
3. Comment out the following code:
   ```
   <subsystem xmlns="urn:jboss:domain:pojo:1.0"/>
   ```
4. Save the file, and restart the application server.

Troubleshooting the Supplier Portal Issues

If you encounter any issues in the Supplier Portal, use the following information to troubleshoot the issues.

Suppliers report issues with the Products and Services list.

In the Supplier Portal on the Product and Services page, when a supplier representative clicks the root node for a set of products or services, not all child nodes are selected.

The Supplier Portal uses a SIF search request to retrieve the contents of the list. Two properties control how many records a SIF search request returns: GETLIST Limit and pageSize. The value of the GETLIST Limit

property must be equal to the value of the pageSize property. When the values are different, the Supplier Portal uses the lower value. If one or both values are too low, the entire list is not returned.

To resolve this issue, first check if the value of both properties are the same.

- If the values are different, increase the lower value to match the other value.
- If the values are the same, increase the value of both properties.

For instructions about finding and setting these properties, see the following topics:

- "Setting the Value of the GETLIST Limit Property" on page 59
- "Configure the Supplier 360 Properties" on page 32

Troubleshooting the Supplier 360 Issues

If you encounter any issues after installing Supplier 360, use the following information to troubleshoot the issues.

Cannot Log In to the Data Director Application.

When you try to log in to the Data Director application, the login fails.

After you deploy the `InfaSupplierMaster` application , the user roles might lose their assigned privileges. The login fails because your credentials might not have sufficient privileges to log in.

To reassign all the privileges to the user roles, promote the following change list to the Operational Reference Store:

```
<MDM installation directory>/app/tsr/hub/schema/met-export/SUPPLIER_hub_change.xml
```

Suppliers are not created in Product 360.

When the connection to the Product 360 Server is interrupted, approved suppliers are not created in Product 360.

While the Product 360 Server is inaccessible, the JMS messages that were not received by the Product 360 Server remain in a pending state. After you re-establish the connection to the Product 360 Server, you can run a recovery service. The recovery service retrieves all pending messages and processes the messages in the order in which they arrived. The Product 360 Server receives the pending messages and creates the missing suppliers.

To start the recovery service, run the following REST API:

```
REST API GET URL: http://<host>:<port>/supplierapp-war/services/jms/recovery
```

The message "Recovery service started" appears. The recovery service retrieves all the pending messages and processes the messages in the order in which they arrived.

CHAPTER 9

Upgrading MDM - Supplier 360

This chapter includes the following topics:

- Upgrade Overview, 93
- Extracting the Application, 93
- Updating the Supplier 360 Database Schema, 95
- Adding JBoss Remoting JAR Files to Lib Folder, 95
- Installing the Supplier 360 Application, 95
- Installing the Application Configuration Tool, 96
- Installing the Supplier Portal, 96
- Enabling the HTTPS Protocol, 97
- Setting the cmx.dataview.enabled Property to True, 98
- Verifying the Supplier 360 Application Settings, 98
- Remove the Composite Object Rows, 98
- Configure the SOAP Service, 99

Upgrade Overview

To upgrade to MDM - Supplier 360 10.3 HotFix 1, you must first import the database schema from a change list. You must install the Appconfiguration application and verify the global Supplier 360 properties. Then you install Supplier 360.

Extracting the Application

You receive the Supplier 360 application as an archive file. Create the following directory structure and extract the contents of the Supplier 360 archive file into it:

```
<MDM Installation Directory>/app/tsr
```

The extracted content contains the following files and folders:

- `bin/`. Contains build files, the setup script, and an uninstall wizard.
- `bpm/`. Contains the ActiveVOS email service and the default business processes in a deployable format.

- `config/`. Contains configuration properties files.
- `datamart/`. Contains the datamart service and the chart configurations.
- `docs/`. Contains the Supplier 360 Data Dictionary document.
- `email-config/`. Contains the directory that defines the email templates. The email templates are used by the ActiveVOS email service.
  - `templates/`. Contains the `avos-templates` and `pim-templates` subdirectories with email body text templates for ActiveVOS and for Informatica MDM - Product 360.
- `externalcall/`. Contains files for external web services.
- `hub/`. Contains the subdirectories that contain the database schema and the configuration files to deploy to Data Director.
  - `cocsconfig/`. Contains configuration files for composite objects and composite services.
  - `entity360config/`. Contains copies of the Entity 360 component instance definitions that ship with Informatica MDM.
  - `idd/`. Contains the configuration files that you use to create the Supplier 360 interface in Data Director.
  - `schema/`. Contains the database schema for supplier data and reference data.
- `images/`. Contains placeholder images for a logo and for a background image for the Supplier Portal login page.
- `lib/`. You must include external libraries in this folder.
- `localizationScript/`. Contains the scripts for localizing labels and error messages.
- `lookuplocalization/`. Contains files for localization of the lookup tables.
- `pre-install-config/`. Contains a file to set global application properties and a file to set the list of products and services in the Supplier Portal.
- `reporting/`. Contains the Highcharts editor, and the Highcharts projects.
- `resources/`. Contains the resource `bundle.properties` files for each of the supported locales.
- `userprofile-provider/`. Contains the configuration files that you use after the installation is finished. Contains the `appconfig.properties`, `PIMLoginProvider.jar`, and `RoleMappingSource.xml` files.
- `appconfiguration.war` file.
- `bundleLocalization.jar` file.
- `MDMAppsServices.war` File for Supplier 360 user interface.
- `mdmappsview-ear.ear` File that contains Supplier 360 components.
- `productversion.jar` JAR file for the product version.
- `provisioning-ear.ear` File for the Provisioning tool user interface.
- `supplierapp-ear.ear` file.
- `supplierexternalcall.war` file.
- `uiwebapp-ear.ear` File for Supplier 360 user interface.

Updating the Supplier 360 Database Schema

Use the latest change list file to update the Supplier 360 database schema. Move the incremental changes from the change list to the Operational Reference Store of Supplier 360 and promote the incremental changes.

Adding JBoss Remoting JAR Files to Lib Folder

If you use a JBoss application server, you must add the JBoss remoting JAR files to the `app/tsr/lib/` folder.

Based on the JBoss version, download the following files from Maven repository to the `app/tsr/lib/` folder:

- jboss-ejb-client
- jboss-remote-naming
- jboss-remoting
- xnio-nio
- xnio-api

Installing the Supplier 360 Application

When you run the installer script, the installer script installs the Supplier 360 application and deploys the ActiveVOS workflows.

1. At a command prompt, navigate to the following directory:

   `<MDM installation directory>/app/tsr/bin`
2. Run one of the following scripts:
   - On Windows. `install-tsr.bat`
   - On Linux. `./install-tsr.sh`
3. At the prompts, enter the following parameters:

Parameter	Description
MDM Hub installation directory	Press Enter to use the default path or type the fully-qualified path to the directory where you installed Informatica MDM Hub.
MDM Supplier 360 Application installation directory	Press Enter to use the default path or type the fully-qualified path to the directory that contains the application files.
Application Server	Type the name of the application server in lowercase.
Application to deploy	Type `tsr`.

Parameter	Description
avos console username	Type the ActiveVOS Console username.
avos console password	Type the ActiveVOS Console password.

The script updates the `supplier-ear.ear` file.

Installing the Application Configuration Tool

To install the Application Configuration tool, run the `install-tsr` script.

1. At a command prompt, navigate to the following directory:

   `<MDM installation directory>/app/tsr/bin`

2. Run one of the following scripts:
   - On Windows. `install-tsr.bat`
   - On Linux. `/install-tsr.sh`
3. At the prompts, enter the following parameters:

Parameter	Description
MDM Hub installation directory	Directory where you install the MDM Hub. You can press Enter to use the default path in the script or type the fully qualified path to the directory where you install the MDM Hub.
MDM Supplier 360 Application installation directory	Directory where you install the Supplier 360 application. You can press Enter to use the default path in the script or type the fully qualified path to the directory where you install the Supplier 360 application.
Application Server	Name of the application server. Use lowercase to type the name.
Application to deploy	Application that you deploy. Type `appconfig`.

Installing the Supplier Portal

Suppliers use the supplier portal to initiate and maintain a supplier relationship with your organization.

1. At a command prompt, navigate to the following directory:

   `<MDM installation directory>/app/tsr/bin`

2. Run one of the following scripts:
   - On Windows. `install-tsr.bat`
   - On Linux. `./install-tsr.sh`

3. At the prompts, enter the following parameters:

Parameter	Description
MDM Hub installation directory	Press Enter to use the default path or type the fully-qualified path to the directory where you installed Informatica MDM Hub.
MDM Supplier 360 Application installation directory	Press Enter to use the default path or type the fully-qualified path to the directory that contains the application files.
Application Server	Type the name of the application server in lowercase.
Application to deploy	Type `portal`.

The script installs the Supplier Portal.

Enabling the HTTPS Protocol

If you use subject areas, and the MDM Hub and Product 360 are configured to use the HTTPS protocol, enable the HTTPS protocol for the Supplier 360 components.

1. Extract the `InfaSupplierMaster.zip` file located in the following directory:

   `<MDM installation directory>/app/tsr/hub/idd`
2. In a text editor, open the `BDDConfig.xml` file.
3. In the XML file, search for the following entries:
   - `<externalLink name="supplier_doc_child_link" type="IFRAME" url="http://@LOCALHOST@:@LOCALPORT@/supplierapp-war/mdm/supplierapp/document">`
   - `<externalLink displayName="App Configuration" name="appconfig" type="IFRAME" url="http://@LOCALHOST@:@LOCALPORT@/appconfiguration">`
4. In the `url` parameter of the selected entries, change `http` to `https`.
5. Save the XML file.
6. Log in to the IDD Configuration Manager, and select the application.
7. Click **Import** > **Import to existing IDD application**.
8. In the **Import to existing IDD application** dialog box, select **BDD Configuration**.
9. Click **Browse**, and select the `BDDConfig.xml` file.
10. Click **Import**.

Setting the cmx.dataview.enabled Property to True

The `cmx.dataview.enabled` option specifies whether the Data workspace, Application Configuration, and related elements appear in IDD applications. When `cmx.dataview.enabled=true`, you can view the Application Configuration tab.

1. Navigate to the following directory:

   `<MDM installation directory>/hub/server/resources`
2. Use a text editor to open the `cmxserver.properties` file.
3. Set `cmx.dataview.enabled=true`.
4. Save and close the file.
5. Validate the schema and redeploy the IDD application.
6. Restart the application server.

Verifying the Supplier 360 Application Settings

Verify the global Supplier 360 application settings in the Application Configuration tool.

1. Launch Data Director.
2. Log in with your user credentials.
3. If prompted to select an application, select **InfaSupplierMaster**.
4. Click **App Configuration**.
5. On the **Connections** tab, verify the connection parameters.
6. On the **Properties** tab, verify the properties.

Remove the Composite Object Rows

In the C_REPOS_CO_CS_CONFIG table, remove the composite objects in the CUSTOM_JAVA_CLASSES and CUSTOM_XML_SCHEMA rows.

1. In a database tool that supports the BLOB data type, open the C_REPOS_CO_CS_CONFIG table.
2. Delete the following rows:
   - CUSTOM_JAVA_CLASSES
   - CUSTOM_XML_SCHEMA

Configure the SOAP Service

Configure the SOAP service to validate supplier data before a supplier submits the data in the onboarding application.

1. Log in to the Provisioning tool and select the **supplier_hub** Operational Reference Store.
2. Click **Business Entity** > **Extensions**.
3. From the **Extensions** list, select **SOAP Services**, and then select **SOAPSupplierExternalService**.
4. In the **Endpoint** field, specify the host name and port number of the machine where you have installed the Supplier 360 application.

   If your environment is configured to use the HTTPS protocol, specify the network protocol as HTTPS in the URL.
5. Click **Apply**.
6. Publish the changes to the MDM Hub.
   a. Click **Publish**.

      A confirmation dialog box appears that prompts you to publish or review the changes.
   b. Review the changes or publish without a review.
      - To publish without a review, click **Publish**.
      - To publish after a review, click **Review Changes** and follow the instructions that appear on the screen.

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