

Migration from IDD Subject Area to E360

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Overview

- From MDM version 10.x and later, Informatica Data Director was modernized i.e. Data structure changed from Subject areas to Business entities.
- IDD Subject area organizes and relates the base objects in the MDM ORS to one another in a three-level tree structure.
- Business entity organizes and relates the base objects in a tree structure with unlimited depth.
- Business entity also supports an enhanced user interface, REST API calls, smart search and the ActiveVOS engine for business process workflows.

Differences between Entity 360 and Subject Area UI frameworks in IDD

	Subject Areas	Business Entities
API that is used	Services Integration Framework (SIF)	Business Entity Services
Key components	Subject Area, Look Up, Cleanse Function, Data Security, Task Administration	Business Entity, Reference Entity, Transformation, field filters, Tasks & Trigger
Modelling	Only used within IDD. Similar to business entities, subject areas are a logical layer on top of the underlying relational base object model, however subject areas cannot be accessed as composite services through an API	Business Entities allow you to create a model that can be used outside IDD, as RESTful APIs
Workflow	Workflows are triggered manually only through subject area actions in IDD	Workflows can be triggered through any change of Master Data either through Entity360 pages in IDD or directly through services using Activevos
Customizations	Low level control through IDD User Exits	Use of External calls and Business Entity and Business Entity View transformations and integration of cleanse mappings (e.g. DQ).

Differences between Entity 360 and Subject Area UI frameworks in IDD

	Subject Areas	Business Entities
Data Structures	Subject Area Data Structure (In the subject area structure, data is organized around subject areas and aggregated into subject area groups)	Business Entity Data Structure (Business Entity Data Structure In the business entity data structure, data is organized around business entities)
Configuration Tool	IDD Configuration Manager (The IDD Configuration Manager is a web-based utility used to add, change, and manage IDD applications that are based on subject areas)	Provisioning tool (You can use the Provisioning tool to define business entity models, tasks, and transformations, and design the user interface for Data Director)
Search Options	Search available using NAME3 SearchQuery and exact/db search	Smart Search using Elastic Search NAME3 SearchQuery
Import / Export	Import/ Export capabilities provided	Import supported from 10.4 Export supported
User Interface	More restrictive. Subject areas are limited to 3 level (parent, child, grandchild)	More flexible layout options – also, different layouts for different roles for different business entities and for different use cases. No 3-level nesting restriction

Differences between Entity 360 and Subject Area UI frameworks in IDD

	Subject Areas	Business Entities
Top level tabs as external links	Supported	Not yet supported
Task Administration	Was only ever supported with Siperian Workflow (which is now deprecated)	In 10.4
Custom Authentication	Can be configured through legacy IDD tool	Can only be configured through e360
Timeline	Timeline is supported	Timeline is not supported
Attach documents	Not supported	Supported
Futures	Critical bug fixes only; no new features or enhancements are planned	Entity 360 and Business Entity Services are the building blocks for MDM UIs of the future – this is the area we’re invested in enhancing and developing new features for

IDD Vs e360– Components

- Use the Provisioning tool to build e360 user friendly UI.
- Following images show the original list of subject areas and the generated list of business entity models.
- Components which are being configured in IDD -> verify in the Provisioning tool as:
 - ✓ Subject Area -> Business Entity
 - ✓ Look Up -> Reference Entity
 - ✓ Cleanse Function -> Transformation
 - ✓ Task Administration -> Tasks & Trigger
 - ✓ Relationships
 - ✓ Column Specific Properties : Editable / Required / Filters / Data Security / Data Masking.

The image displays two side-by-side screenshots from Informatica software. The left screenshot, titled "IDD Configuration Manager Subject Areas", shows a hierarchical tree structure of subject areas. The right screenshot, titled "Provisioning Tool Business Entity Models", shows a list of business entities.

IDD Configuration Manager Subject Areas

- Subject Areas
- Tasks
- Controls
- Subject Area Groups
 - Customer
 - Person
 - TelephoneNumbers
 - Emails
 - PersonDetails
 - Addresses
 - Organization
 - TelephoneNumbers
 - Details
 - Addresses
 - Products
 - Products
 - ProductAttributes
 - ProductGroup
 - Account
 - Household
 - Household
 - Members
 - Account
 - CreditCard

Provisioning Tool Business Entity Models

Home Business Entity UI Configuration

Modeling

Business Entities

Create Delete

Account

CreditCard

Household

Organization

Person

ProductGroup

Products

Modes for Informatica Data Director

Mode	Description
Legacy Mode	If you do not migrate your application to the business entities, use the Legacy mode. You continue to see the legacy views and functionality for subject areas. You continue to use the IDD Configuration Manager to manage your applications
E360 Mode	If you migrate to business entities, select the E360 mode. Business users can use the E360 views and functionality for business entities. You use the Provisioning tool to manage your migrated applications
Hybrid Mode (not recommended unless there is special use case)	If you migrate to business entities, but you want to access to all the views and features for both subject areas and business entities, use the Hybrid mode.

Views(E360 views and legacy views)

Legacy Viewsfor Subject Areas	E360 Viewsfor Business Entities	Differences for the E360 Views
Data View	Business Entity	In the Business Entity view, you can add related social information, such as the entity's Twitter feed. You can also add component that displays similar business entities. You can configure more than one Business Entity view, and add the custom views to the Views list.
Matches View	Matching Records	In the Matching Records view, users can match and merge descendant records. Users can also run a smart search to find and add similar records. You can manually override a value in the Matching Records view.
History View	History	In the E360 version of the History view, the events appear in a vertical chronology, and data change event details appear in a panel to the right.

Pre-Requisites for Migration

- Hub Repository & IDD app should be in Valid state
- Need to ensure that Operational Reference Store (ORS) and the IDD application meet the following requirements for business entities :

Area of Impact	Requirement	Description
Hierarchy entity base object	Foreign key relationships must map to a CODE column	If a foreign key maps to another type of column, remap it to a CODE column.
Subject area names (special characters)	No underscores or other special characters in names	If some subject area names contain the underscore character or special characters, rename the subject areas to remove the underscore.
Child-level subject area names (character case)	Preserve case	If the child-level subject area names contain uppercase characters, preserve the case by adding <code>com.siperian.dsapp.mde.common.idd2cocs.Many2ManyChild.name.version=10.2</code> in the <code>cmxserver.properties</code> file.
Validation	The IDD application based on subject areas must be valid.	In the IDD Configuration Manager, validate the IDD application and resolve any errors.

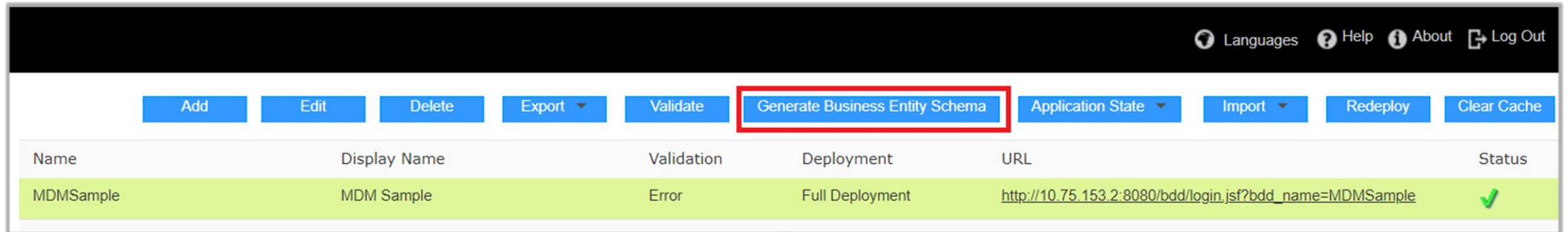
Change Mode of IDD Application

- Once we open an IDD application based on subject areas, by default we see the legacy views and search query feature. After you migrate, we can enable the E360 mode to see the E360 views and the smart search box.
- To change the mode for IDD, we need to set properties in the MDM Hub Server properties file and the Process Server properties file.
- The following table lists the properties and the before and after settings:

Properties	Before = Legacy Mode	After = E360 Mode
cmx.dataview.enabled	true	false
cmx.e360.view.enabled	false	true
cmx.e360.match_xref.view.enabled	false	true
cmx.ss.enabled	false	true

Generate the Business Entity Schema

- Use the IDD Configuration Manager to generate the Business entity schema.
- During the generation process, the MDM Hub performs the following migrations:
 - Creates a business entity for each subject area
 - Converts lookups to reference entities
 - Migrates relationships
- The process saves the business entity schema in the C_REPOS_CO_CS_CONFIG repository table.



Name	Display Name	Validation	Deployment	URL	Status
MDMSample	MDM Sample	Error	Full Deployment	http://10.75.153.2:8080/bdd/login.jsf?bdd_name=MDMSample	✓

E360 Features

❖ Integrated business entity services

- A business entity service is a set of operations that run MDM Hub code to create, update, delete, and search for records in a business entity. It is generated directly from the BE data model

❖ Configurable User Interface

- Can design user interface layouts that can contain standard and custom components, such as a Twitter feed. Business analysts can easily create layouts targeted at specific user roles.

❖ Unlimited nesting of descendant records

- A subject area can include descendant records up to the grandchild level. BE models can have an unlimited depth of descendant records.

❖ Ability to merge child records

- With subject areas, you cannot merge child records. With business entities, you can merge child records that are at the same descendant level.

❖ Simplified and enhanced data search

- A full-text search on business entities retrieves data faster than a faceted search on subject areas.

Create an E360 Application

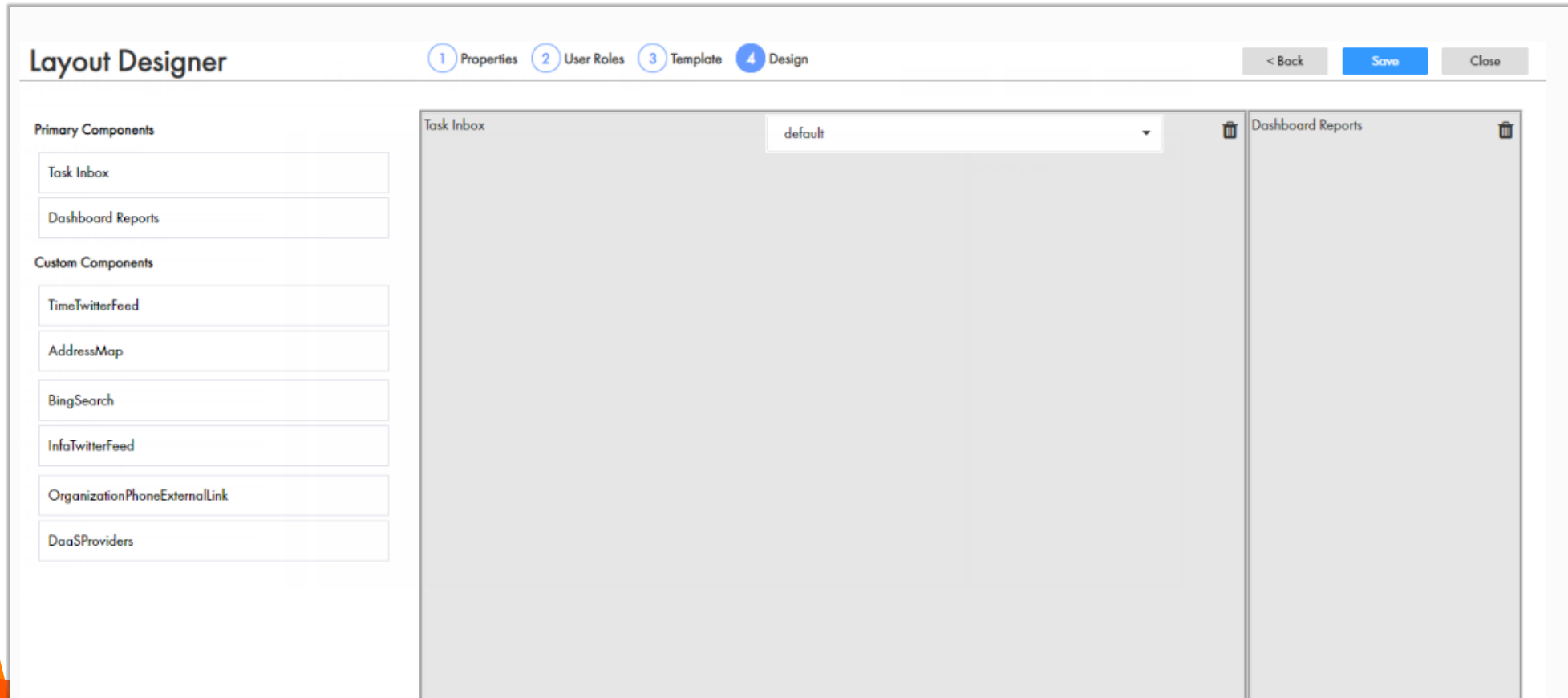
- In the Provisioning tool, create an application that is based on the same ORS as the legacy application.
- This data gets stored in the C_REPOS_COMPONENT_INSTANCE table in DB.

The screenshot displays the Informatica Provisioning tool interface. At the top, there are navigation tabs for 'Home', 'Business Entity', and 'Configuration'. The 'Database' dropdown is set to 'mdm_sample (localhost...)', with 'Publish' and 'Discard Change' buttons to its right. The main interface is divided into three panels:

- Applications:** A dropdown menu shows 'E360 Applications'. Below it are 'Create' and 'Delete' buttons. A blue button labeled 'MDMSample' is visible at the bottom of this panel.
- MDMSample:** A tree view shows a folder 'MDMSample' with sub-items: 'Business Entities', 'Search Configuration', and 'Default Display Formats'. 'Create' and 'Delete' buttons are positioned to the right of the tree.
- MDMSample Configuration:** A form with 'Apply' and 'Discard' buttons. Fields include:
 - Name: MDMSample
 - Display Name: MDM Sample
 - Source System: Admin
 - Session Timeout (minutes): 90
 - Display Default Record V...:
 - Search Options: Smart search, Queries, Queries dialog in application

Design Home Page / Dashboards

- Use the Layout Designer to design the Home page for an IDD application with business entities.
- In the Home page, add components, such as a task inbox, charts, social media feeds, and other external resources.
- The following image shows the Design page with the Task Inbox component and the Dashboard Reports component in the workspace:



Customizing E360 Application

- Design Entity view components and layouts
- Create new business entity models / Views
- External Components & internal components can be configured. For e.g. Twitter, Similar records etc.

Smart Search box available in header in all page views

In page navigation provides an easy way to scroll through the entity.

Primary block view for showing Composite Object primary identifying information (configurable)

Consistent look-and-feel with Customer 360

Modules that allow you to provide additional entity information

Child blocks that display related values. This can be viewed in form or tabular format

Primary Ind	Cameo Category	Longitude	City Name	Postal C
Y	COSMOPOLITAN SUB...	-84.23461	Norcross	30092
N		-122.213289	Redwood City	94063

EFF End Date	EFF Start Date	Name	Name Type Cd
		James N. Rapp	Preferred

Richer task management functionality

Inbox improvements & support for task attachments

Upgrade simplification

Configuration enhancements

The screenshot displays the Informatica Task Manager interface. On the left, a 'My Tasks (3) Available (3)' list shows three tasks. The third task, 'Review changes in Devin Lee', is highlighted in blue. The main panel shows the details for this task, including 'Submitted by admin on April 4, 2018' and 'Due date: April 11, 2018'. Below this, there are tabs for 'Record Details', 'Comments', and 'Workflow Diagram'. The 'Record Details' tab is active, showing a 'Quickly scroll to:' sidebar with categories like Person, Social Network, Address, Name, Artifact, Telecom, Org, and Electronic Address. The main area displays a grid of fields for 'Devin Lee', including First Name (testin), Last Name (testing123), Display Name (testin testing123 BJ), Name Prefix (BROTHER), Gender, Customer Tier (Gold), Activity Status (Active), and Generation (BACHELOR OF JOURNALISM). At the bottom, there are expandable sections for 'Social Network Account (0)', 'Address (0)', 'Name (0)', and 'Artifact (0)'. The interface includes a search bar, navigation buttons (Approve, Reject, More Actions, Edit), and a footer with pagination information.

Improved Security for Entity 360

Security Access Manager
integration for Entity 360
functionality

Data filters to control access
based on user role and
attribution

Default values based on user
roles

Data filters

Apply Discard

Name: Location data filter

Description: Filter records according to regional datastewards.

Field: Location

Active:

Deny +

Value: Canada +
United States of America x

User role: Datastewards Europe West +
Datastewards Europe East x

Allow +

Value: Canada +
United States of America x

User role: DataStewards North America +

Enable Smart Search

- To enable smart search, open a business entity and select the fields which we want to be searchable.
- When config are done, run the Initially index Smart Search data batch job from the MDM Hub Console.

The screenshot shows the MDM Hub Console interface. At the top, the browser address bar displays the URL: `t:8080/e360/mdm/entity360view/?wstate=(%27$ws%27:NEWMODAL)`. The page title is "MDM Sample". In the top right corner, there is a search bar with a dropdown menu set to "Person" and the text "ADAM" entered. A red box highlights this search bar. Below the search bar, the main content area is titled "Search". On the left side, there is a "Filters" panel with three sections: "Electronic Address 1234", "Address Type", and "Name". Each section has a corresponding input field. The "Apply" button is highlighted in blue. On the right side, the search results are displayed in a table titled "Search Results for Person(5)". The table has five columns: "First Name", "Last Name", "Middle Name", "Display Name", and "Gender Cd". The results are as follows:

First Name	Last Name	Middle Name	Display Name	Gender Cd
			MISS MARY ADAM	
ADAM	GRAY		ADAM GRAY	
ADAM	BOSH		ADAM BOSH	
MICHELLE	ADAM		MICHELLE ADAM	
SAMIR	ADAM		SAMIR ADAM	

Migrating Workflow Adapters

- When you migrate an application to business entities, you must migrate from the Siperian or SA ActiveVOS workflow adapter to the BE ActiveVOS workflow adapter
- The BE ActiveVOS workflow adapter uses the BE ActiveVOS workflows
- The MDM Hub supports a primary workflow adapter and a secondary workflow adapter
- When you switch to the BE ActiveVOS workflow adapter, use the Provisioning Tool to configure tasks to use the BE ActiveVOS workflows
- If you have not previously used Multidomain MDM with embedded ActiveVOS, select the BE ActiveVOS adapter as the primary workflow adapter
- To work with ActiveVOS tasks that were created before Multidomain MDM version 10.1, routinely run a migration script to populate the tasks with the required presentation parameters

Adobe Flash Support(KB#610975)

- Adobe announces the end of life of Flash in December 2020.
- Flash components are used in parts, in IDD/E360 – Hierarchy View, History View, Timeline View, IDC.
- If we are using any of the above features, then will be impacted by the Browser Flash deprecation. It is highly recommended that to upgrade to the supported browser version – with MDM upgrade defined below.

Adobe Flash End of Life Recommendations		
Functionality needed beyond 2020 (IDD/C360 Components)	Current Version	Upgrade version
Subject Areas¹	10.3	10.3 HF3
	10.2 ²	10.3 HF3 10.2 HF5 ²
	10.1 & Old	10.3 HF3
Both Subject Areas & Entity 360¹ (Hybrid approach)	10.3	10.3 HF3
	10.2 ²	10.3 HF3 10.2 HF5 ²
	10.1 & Old	10.3 HF3
Entity 360 only	Any Version	10.3 HF3 10.4 10.2 HF5 ²
No Subject Areas & Entity 360 (i.e. No IDD)	Any Version	Not Impacted because of Flash Deprecation

Tentative Planned Release dates
 10.3 HF3: End of Jun' 2020
 10.2 HF5: End of Jul' 2020

1. If you are using subject areas, migrate to Entity 360 to get enhanced functionalities. If you are using Informatica Data Control (IDC) component, which in turn relies on subject areas, upgrade to 10.3 Hot Fix 3.

2. Version 10.2 reaches the end of life on the 31st of Oct 2020. For more information, contact Informatica support to purchase extended support.



Migration FAQs

Is it mandatory to upgrade to the business entities?

No. Informatica encourages customers to use Data Director with business entities

Can I still use user exits with business entities?

No. User exits do not work with business entities.

After I upgrade, can I continue to show only the legacy views?

Yes. You do not have to migrate your application to business entities.

Do Repository Manager changelists contain information about business entities?

Yes. When you export a changelist from the Repository Manager in the Hub Console, the changelist contains all the business entity details

Do I need to use ActiveVOS with business entities?

Yes. ActiveVOS is the only supported BPM engine for business entities.

Best Practices/Known Limitations

- If you plan to use Hybrid mode, you must ensure that the E360 application name is the same as the legacy application name.
- For Generation of BES : Use either pure IDD application OR create from scratch in the provisioning tool.
- Do not mark the rowidObject field as searchable. The business entity data model does not support searches on the rowidObject field.
- Special characters such as ‘_’ are not allowed in Subject Area labels
- Timeline is not supported in e360
- There is no advance search query in e360
- Task inbox search is case sensitive
- Generate Business Entity Schema should be done from IDD config one time only, after that provisioning tool should be used for publish



Thank You