Survivorship in Informatica MDM SaaS

Create a master record or the most trusted version of a record originating from multiple contributing source systems.
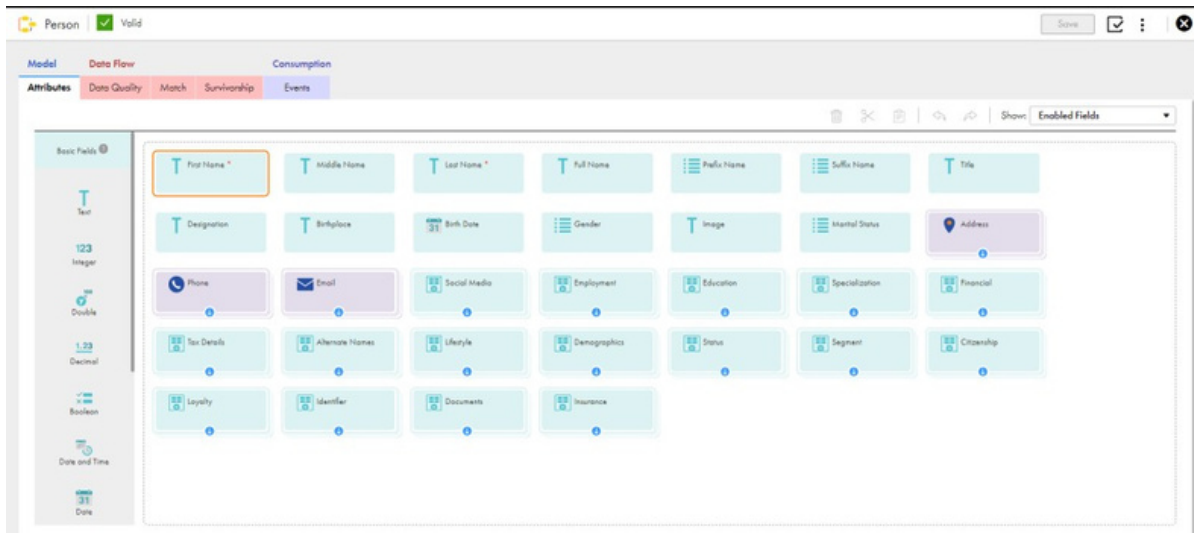
PRODUCT EXPLAINED:

Informatica MDM SaaS (IICS account)

Business 360 and Customer 360 (The User must have required privileges to access the mentioned services in IICS), Data Integration.

CONFIGURING SURVIVORSHIP FOR BUSINESS ENTITY

Business Entity represents an entity that contains fields that are required for your business with significance to an organization. For example, if you are an Education System, your data field might contain the First Name, Middle Name, Last Name, Age, Courses, Address of the student.

The attributes in the business entity can be customized as per the business needs of your organization. Pre-defined business entities such as Person, Organization, Contact, and Supplier are available out-of-the-box in the Business 360 Console service under IICS. We can extend the pre-defined business entities or create new business entities altogether using the Business 360 Console.

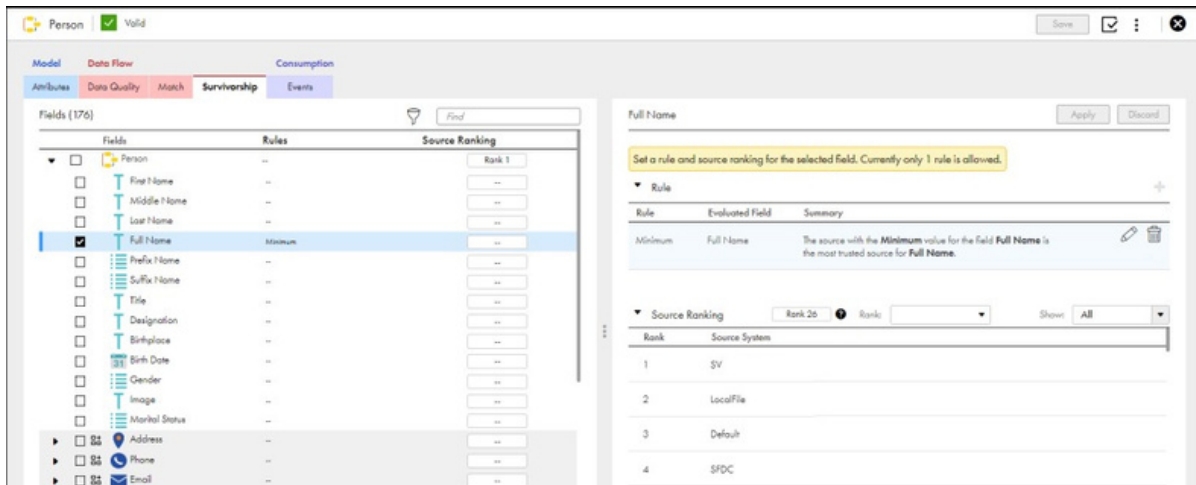**LUMENDATA**
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After creating the Business Entity according to business needs, Survivorship can be configured. Survivorship should be configured before loading the data.
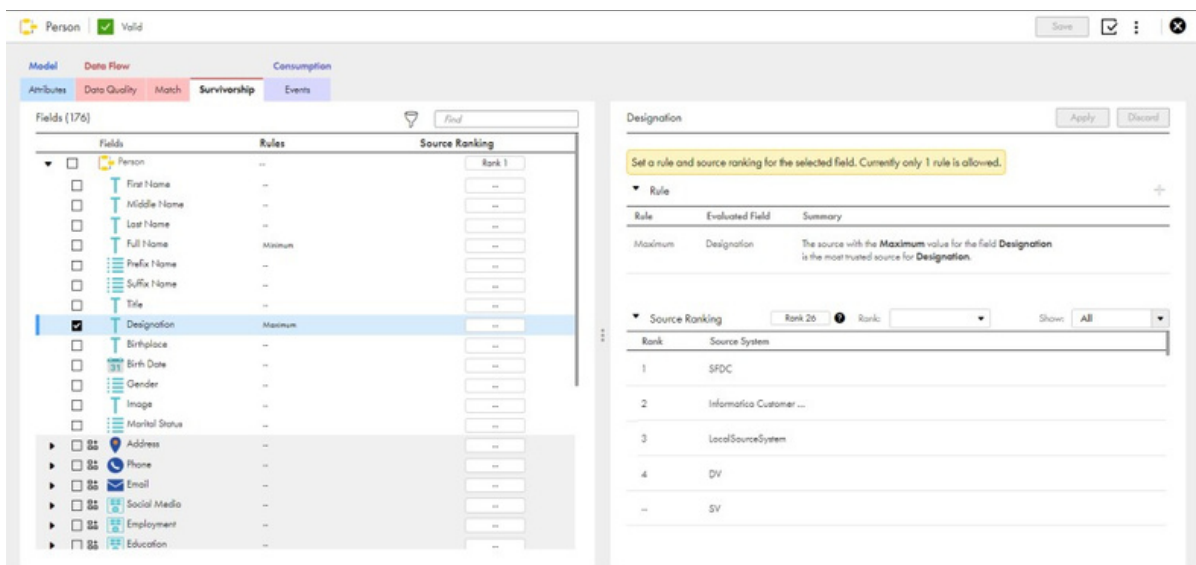
SURVIVORSHIP

- Survivorship is configured to find the best version of records.
- A customer requirement is to find the best quality of data, and the best version of data, which can be considered as Master Record.
- It's Mandatory to run a match and merge job to create master records based on the survivorship configuration.
- It can be configured at the Individual Field level or Entity level.
- Before configuring survivorship, we need to define:

  1. Source ranking.
  2. Rules.

SOURCE RANKING:

- There can be multiple sources that are available in an organization. These source systems can consist of similar data.
- Source ranking defines which source data should be considered as more reliable data.
- Ranks can be assigned manually.
- The source system with the highest rank will be considered first as the best version of data. i.e., if there is a source system with the highest rank as 2 then the data coming from that source will be considered first for the master record.
- The rank of the source system can be defined according to the reliability of the field. For example, if you want reliability for Full Name from Source System "SV" then it can be ranked highest for this field.

- Designation from source system "SFDC", then for that field source system can be ranked highest.

RULES:

Rules are set to define the trust value of the field. It can be added, deleted, or edited.
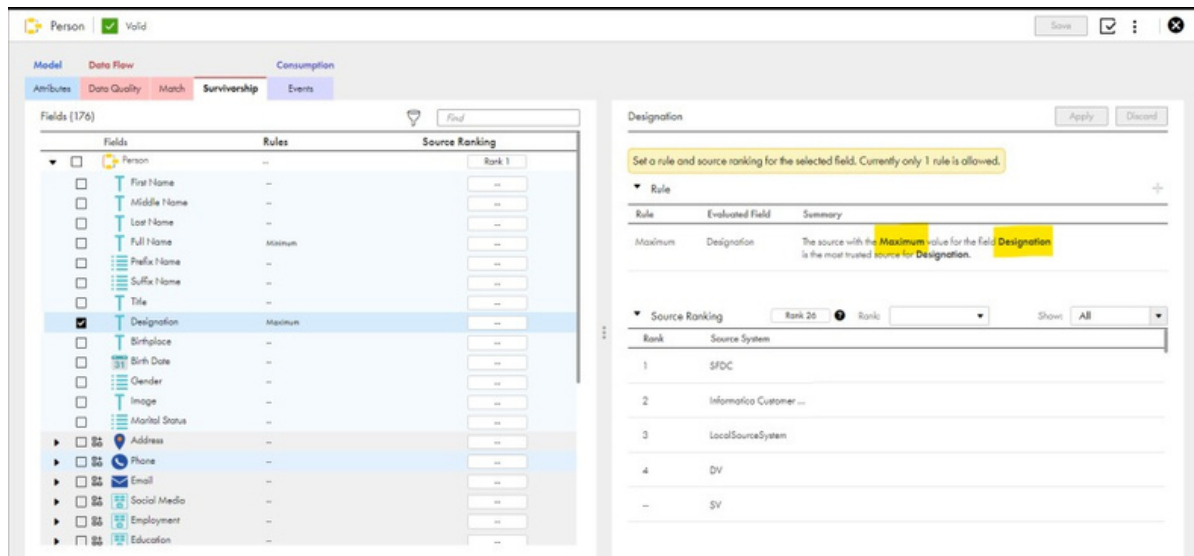
There are 3 types of rules:

- **Decay:**

It indicated the rate at which the trust level will decrease over a period of time for a particular field. It can be configured separately for different source systems.
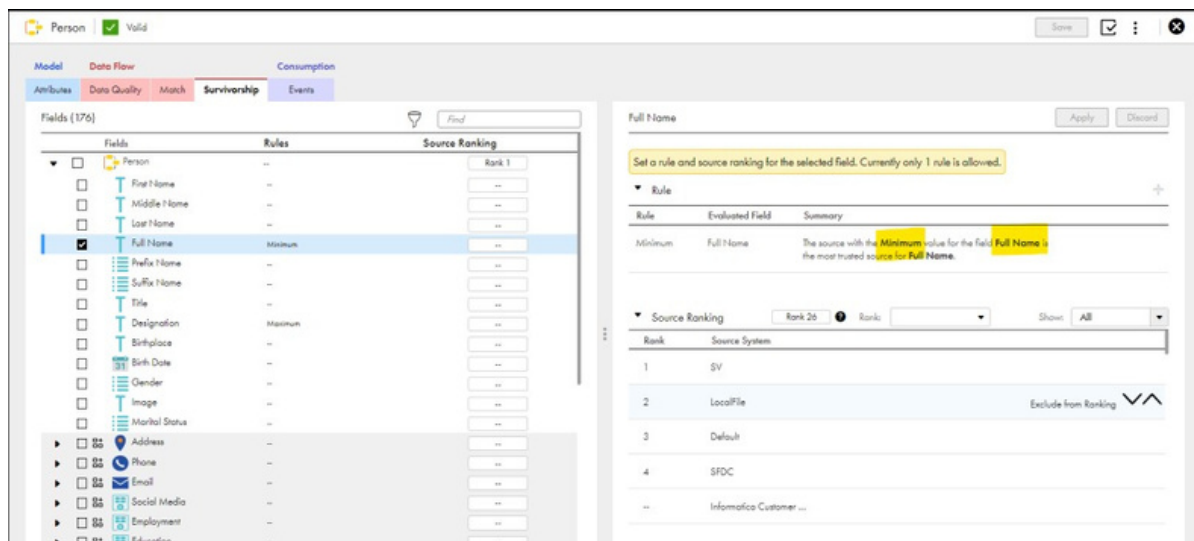

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- **Maximum:**

Defines trust value as maximum for the field. It depends separately for different types of fields. For example, if it's a Text field then it will sort in the alphabetical order that is maximum value will be given according to the alphabetical order Also Upper-case letters will be given maximum value than lower case value.

- **Minimum**

1. Identifies the trusted value based on the minimum value of a field. Not applicable to a business entity and field groups.
2. The minimum trust score that the source system can have. The value must be equal to or less than the maximum trust score.

- These are two similar records coming from different source systems (SV, SFDC).
- Full name is Configured for Source System SV and Designation is configured for source system SFDC.
- Blue highlighted fields from below screenshot shows the survived values from both the source systems.

After performing Match and Merge, for the record 'Hushal Langfat' as per survivorship configuration Full Name was survived from Source System "SV" and Designation was Survived from Source System" SFDC". And combining this form a Golden record for Hushal Langfat.

ABOUT LUMENDATA:

LumenData is a leading provider of Enterprise Data Management, Cloud & Analytics solutions provider. We enable enterprises to modernize their legacy data infrastructure and derive greater insights into their business. Founded in 2008, with locations in multiple countries, LumenData is privileged to serve over 100 of the world's leading companies, including KwikTrip, Versant Health, US Food & Drug Administration, US Department of Labor, Cummins Engine, BCG, and others.

LumenData is SOC2 certified and has instituted extensive controls to protect client data including adherence to GDPR and CCPA regulations.

Get in touch to discuss how we can facilitate data-driven transformation for your organization.

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