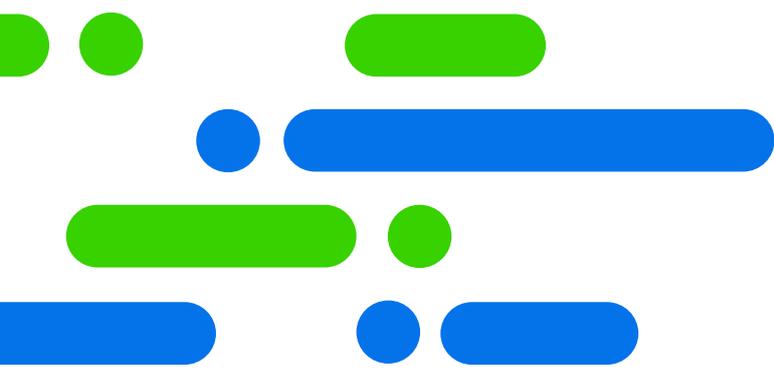




Customer MDM



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1. Overview

This Customer MDM course takes participants through the various aspects of Customer MDM delivery covering the concepts of Data Modeling, Data Match, Data Merge, Golden Record Management, Data Security, Data Governance, Analyzing Data, and UI Configurations.

This course is designed with a “Tell Me” and “Show Me” learning format to cover all the concepts at the advanced level, while the “Try Me” and “Assessment” focus on various business use cases.

2. Objectives

By the end of this course, you will be able to:

- Understand the process of creating a Base Data Model consisting of various entity types, their attributes, and relationships along with the respective mappings.
- Understand the process of creating the Reference Data Model.
- Understand and define the Deterministic and ML-based match rules to help the application match the Source Record with the Golden Record.
- Understand and define the Merge Threshold values to help the system perform Auto or Manual merge based on the match score calculated between Source Record and Golden Record.
- Understand and explore the Golden Record Management stages the Source Record will undergo and enrich the values, such as Source Record Management (SRM), Address Record Management (ARM), and Golden Record Management (GRM).
- Understand the data security concepts to secure the data in the application by granting access permissions to users based on their roles.
- Understand how to set up the permissions at the entity and attribute levels in the application.
- Understand the process of applying the data governance rule for each entity and business conditions for computation and validation use cases.
- Understand and view the entity data in the Graph, Hierarchy, and Organization view with the graph navigation menus.
- Understand the Tenant-specific folder structure and customize the UI elements based on business needs.

3. Duration

The course duration is 4005 minutes.

4. Agenda

4.1 Module 1: Data Modeling – 909 Minutes

- Data Modeling Concepts
 - Data Constructs
 - Entity Model
 - Match Configurations
 - Reference Data Model
 - Application Context
 - EARC Model and Structure
- Base Data Model
- Reference Data Model

4.2 Module 2: Data Match – 159 Minutes

- Concepts of Data Match
- Deterministic Match Rules
- ML Based Match Rules
- Standardization
- Match data Profiler

4.3 Module 3: Data Merge – 83 Minutes

- Concepts of Data Merge
- Auto Merge
- Manual Merge
- Merge Configuration

4.4 Module 4: Golden Record Management – 87 Minutes

- Match and Merge Management
 - Source Record Management (SRM)
 - Address Record Management (ARM)
 - Golden Record Management (GRM)
- GRM state and GRM process state
- Deterministic match flow
- Golden record management flow
- How to configure GRM flow
- GRM Workflow
- GRM Flow

- Guidelines for Tenants and ML Based match setup
- Guidelines for GRM Batch App Schedule and Attributes
- Guidelines for GRM Relationships and Standardization Rules
- Guidelines for Business Rules and Data Onboarding

4.5 Module 5: Data Security – 947 Minutes

Data Security

- Authentication and Authorization in the application
- Permissions and Authorization Model
- Set Domain Level Permissions
- Set Entity Level Permissions
- Set Attribute Level Permissions
- Hide Entity Type Permissions

Dynamic Authorization

- Overview of Dynamic Authorization
- Role-based v/s Dynamic Authorization
- How does Dynamic Authorization work?
- Components
- Related Use Cases
- Set Attribute Permission at Entity and Domain Level

4.6 Module 6: Data Management – 90 Minutes

- Data Management & Enrichment Concepts
- Search & Refine Data
- Single Data Management
- Bulk Data Management
- Relationship Management

4.7 Module 7: Data Governance – 820 Minutes

- Introduction to Data Governance
- Why Data Governance?
- Governance Concepts
- Entity Manage Object
- Business Language
- Business Rules
- Data Governance Model
- Populate GRM State Update
- Copy Account ID to MDM ID

4.8 Module 8: Analyzing Data – 12 Minutes

- Concepts of Analyzing Data

4.9 Module 9: UI Configurations – 898 Minutes

- Prerequisites
- Overview
- Folder structure
- Understand OOTB Configuration
- Guidelines
- Tenant Code Base – Folder Structure
- Default Coalesce Path
- Configurations at different Levels
- UI Config Manage
- Tenant-level configuration
- Entity creation wizard setup
- Entity app configurations

5. Contact Us

For any additional information on the available catalog, please write to us at university@syndigo.com