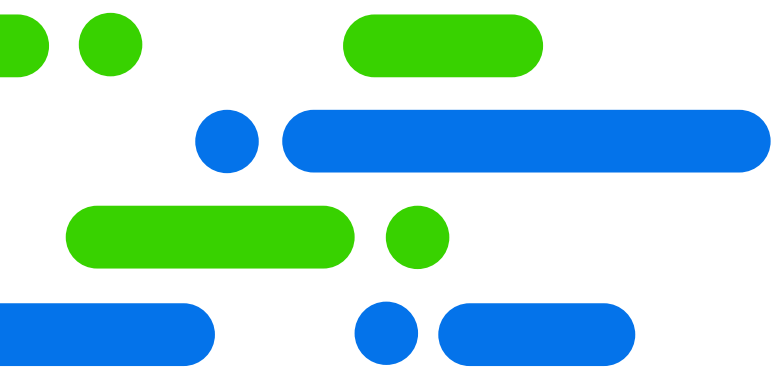


# Customer MDM



# Contents

- 1. Overview ..... 2
- 2. Objectives ..... 2
- 3. Duration ..... 3
- 4. Agenda ..... 3
  - 4.1. Module 1: Data Modeling – 892 Minutes ..... 3
  - 4.2. Module 2: Data Match – 118 Minutes ..... 3
  - 4.3. Module 3: Data Merge – 39 Minutes ..... 3
  - 4.4. Module 4: Golden Record Management – 810 Minutes ..... 3
  - 4.5. Module 5: Data Security – 991 Minutes ..... 4
  - 4.6. Module 6: Dynamic Authorization – 72 Minutes ..... 4
  - 4.7. Module 7: Data Management – 15 Minutes ..... 4
  - 4.8. Module 8: Data Governance – 815 Minutes ..... 4
  - 4.9. Module 9: Analyzing Data – 13 Minutes ..... 5
  - 4.10. Module 10: Experience Apps – 29 Minutes ..... 5
  - 4.11. Module 11: UI Configurations – 994 Minutes ..... 5
- 5. Reference Materials ..... 5

# 1. Overview

This learning journey takes you through the Customer MDM delivery from an Implementation Consultant perspective covering the concepts of Data Modelling, Data Matching, Data Merging, Data Security, Data Governance, Analyzing Data, UI Configurations.

This journey is designed with a Tell Me and Show Me learning format to cover all the required theoretical concepts at the advanced level and the Try Me and Assessment formats cover the various business use cases.

While this catalog shows all the modules from this journey, learners can select the suitable modules from this flexible modular learning journey to master specific skill competencies.

## 2. Objectives

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

- Create a Base Data Model that consists of various entity types, their attributes, and relationships along with the respective mappings.
- 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 Data security concepts to secure the data in the application by granting access permissions to users based on their roles.
- Understand and set up the permissions at entity and attribute levels in the application.
- Understand and apply 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 Tenant-specific folder structure and customize the UI elements based on business needs.

## 3. Duration

The duration of the journey is 4788 minutes.

## 4. Agenda

### 4.1. Module 1: Data Modeling – 892 Minutes

- Data Model Concepts
  - Base Data Model
  - Reference Data
  - Match Configuration
  - EARC Structure
- Base Data Model
- Reference Data Model

### 4.2. Module 2: Data Match – 118 Minutes

- Data Match Concepts
- Deterministic Match Rules
- ML Based Match Rules
- Standardization
- Match data profiler

### 4.3. Module 3: Data Merge – 39 Minutes

- Merge Concepts
- Auto Merge
- Merge Configuration

### 4.4. Module 4: Golden Record Management – 810 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

#### **4.5. Module 5: Data Security – 991 Minutes**

- Authentication and Authorization in the application
- Permissions and Authorization Model
- Set Domain Level Permissions
- How to set up the permissions at entity and attribute level in application
- Hide Entity Type

#### **4.6. Module 6: Dynamic Authorization – 72 Minutes**

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

#### **4.7. Module 7: Data Management – 15 Minutes**

- Data enrichment concepts
- Data search and management in the application

#### **4.8. Module 8: Data Governance – 815 Minutes**

- Data Governance Concepts
- How and where the data governance information persists for each entity
- Entity Manage Object
- Business Language
- Business Rule Concepts
- Business Rule Builder
- Populate GRM State
- Copy Account ID to MDM ID

## 4.9. Module 9: Analyzing Data – 13 Minutes

- Entity Network Viewer
- Hierarchy View
- Customer Hierarchy – Organization view

## 4.10. Module 10: Experience Apps – 29 Minutes

- Understand D&B connector app
- Understand the Smarty app
- Understand the Address Suggest app
- Understand Deduplication Check App

## 4.11. Module 11: UI Configurations – 994 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. Reference Materials

For any additional information on the available catalogue, please write to us at the following address [university@syndigo.com](mailto:university@syndigo.com)