

dataZen

Customer Data Management



 **dataZen™** Whitepaper

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ChainSys Corporation

Former CIO for Dawn Food Products For 13+ years. 25+ years experience with a variety of ERP systems. Extensive experience in system migrations & conversions. Participated in 9 acquisitions ranging from a single US location to 14 sites in 11 countries. Author of numerous technical books, articles, presentations, and seminars globally.

Featured Domains



Products



Customers



Suppliers



Equipment



Finance



Hierachies



Bills of Materials



Formula



Receipe



Routings



Pricelists



Custom

Customer Data

Management

Customer Data Management (CDM) enables you to keep a “Single Source of Truth” for all your Customer, Addresses, Contacts, and Sites data. It offers data quality solutions to “Get it Clean” and “Keep it Clean” of Customers data. The flexible data governance workflow enables you to govern the Customer’s lifecycle from Onboarding to making additional changes in the most efficient quickest manner. More importantly, Customer 360 is available to achieve insightful data around customers and related transactions such as Opportunities, Sales, Shipments, Invoicing, Payments, Customer Installed base, Service Tickets, Service Contracts and Service workorders.

Why use Customer

Data Management?



Realize the Zen of **Single Source of Truth**



Clean and Complete
Product data ready for you



ML simplifies
Attribution,
minimal manual errors



Simplify
Product Onboarding process



Improve **Product** experience



Sell more using **eCommerce**



Enhance **Supplier** Collaboration



Achieve the **80/20 rule**



Customer Data Management Powerful Offerings

Customer Data Cleansing: Get it Clean and Keep it Clean:

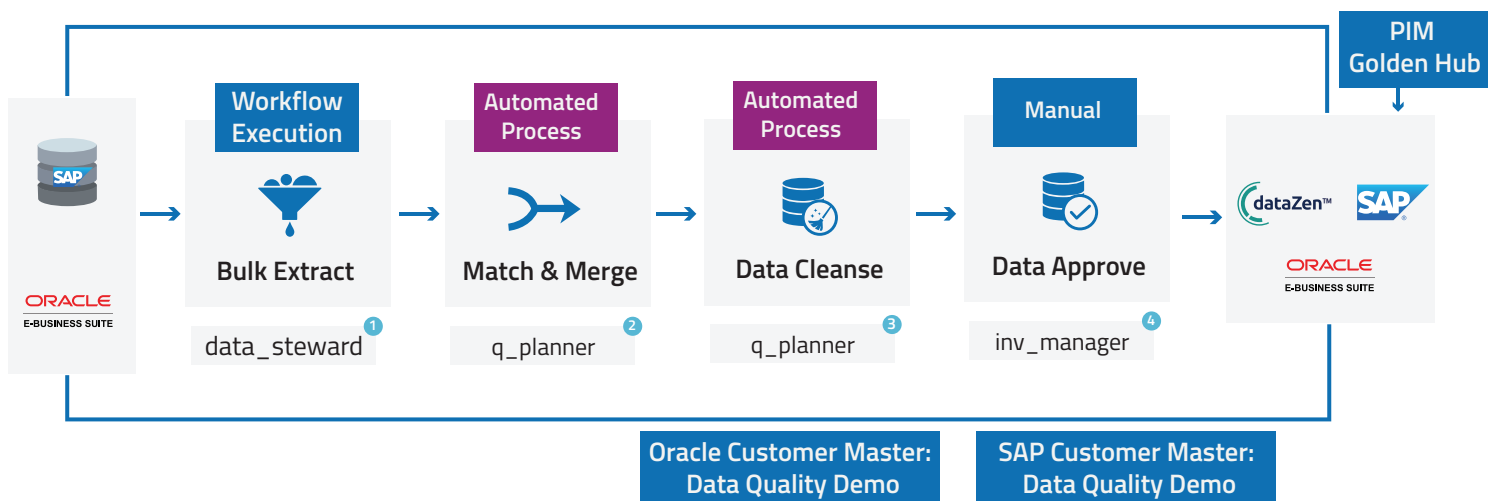
Usecase1: Existing Customer data in SAP or Oracle or other enterprise applications are Bad. Need to cleanse and apply the changes back to enterprise Application.

Usecase2: Migration of Legacy applications to the Modern Enterprise Applications. Part of this exercise would like to Consolidate, Cleanse and Standardize the Customer's and Partner's data and then migrate.

Usecase3: After migration into the modern application, want a Single Source of truth using a clean Governance process for onboarding new prospects and customer accounts, and making changes to the complex customer data either small or bulk quantity easily. Enforce SLA for all activities and measure it. Want to keep the data always clean, setup active and passive governance policies to correct the problems with Human approval and sometimes automated as well.

ChainSys dataZen solves your data quality problems completely by applying advanced machine learning algorithms. Strong background data quality engine is the magic wand for your success. ChainSys has cleansed successfully data for major enterprises including: General Electric, Siemens, Expedia, Amazon, Canon, Agilent Technologies to name a few of the 500+ projects accomplished so far.

Our Goal is to create a "Clean Data Enterprise".



Screen Shots:

Match and Merge Review and Approve Workbench

Pending Review List

Sl.No	Matches	STATUS	Material Code	Material Description	Material Type	Material Type Descript	Inventory Item ID	Condition Level
1	4	Ready to Migrate	CS28908778	Water for Fork Lift Battery	FERT	Finished product	11	1
12	4	Ready to Merge	CS28908779	water for Fork Lift attery	FERT	Finished product	12	1
13	4	Ready to Merge	CS28910149	Recharge Fork Lift attery	FERT	Finished product	1382	1
14	4	Ready to Merge	CS28910367	Electric Fork Lift Power Ba..	FERT	Finished product	1600	1
15	1	Ready to Merge	CS28910388	Envoy Litec	FERT	Finished product	1018	1
16	1	Ready to Migrate	CS28910384	Envoy Lite	FERT	Finished product	1617	1
17	1	Ready to Migrate	CS28909610	USAGE ITEM ON PRICE...	FERT	Finished product	843	1
18	1	Ready to Merge	CS28909611	USAGE ITEM ON PRICE...	FERT	Finished product	844	1

Matching Record List

Sl.No	Hold	Drop	Merge	Migrate	%	Reason	Material Code	Material Description	Material Type	Material Type Descript	Inventory Item ID	Condition Level
1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			CS28908778	Water for Fork Lift Bat...	FERT	Finished product	11	1
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			CS28908779	water for Fork Lift attery	FERT	Finished product	12	1
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			CS28910148	Recharge Fork Lift Battery	FERT	Finished product	1381	1
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			CS28910149	Recharge Fork Lift attery	FERT	Finished product	1382	1
5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			CS28910367	Electric Fork Lift Power Ba..	FERT	Finished product	1600	1

Functional Dependency Profiling Results

Data Profile Information

TOTAL	434
PROFILED	417
EXCLUDED	17

Last Synced Time : 19-May-2020 01:45:01

DPP_MM_SAP_FB - Rules

RULE NAME	EXCLUDED	PROFILED
ABC_Indicator	433	433
Base_Uom	433	433
Coverage_Profile	433	433
Distributors_Own	433	433
Division	433	433
Excluded Record	417	417
Forecast_Part	433	433
Industry_Sector	433	433

DPP_MM_SAP_FB - Data

ABC_Indicator

Sl.No	Material Code	Base UOM	ABC Indicator	Division	Material Description	Inventory Item ID
1	CS20000054	PC	A	01	Three jaw chuck 1...	
2	CS50000095	PC	A	01	6 inch nut	
3	CS50000088	PC	A	01	Three jaw chuck	
4	CS20000744	PC	A	01	Motherboard Hol...	
5	CS07482802	PC	A	01	AUDI Q5 Rear Door	
6	CS07781875	PC	A	01	Stainless Steel Rod	
7	CS07781876	PC	A	01	Stainless Plate Sm.	



Data Quality Workflow Configurations: It's really fun to work on this!!

The screenshot shows the DataZen configuration interface for a 'Quality_Process' workflow. The main area displays a process diagram with a 'Match' step highlighted. A 'Match' configuration window is open, showing the following details:

- Name:** FILTERLIMIT_01
- Threshold:** 80
- MatchWith:** Hub
- Reference Object:** Match_material
- Consider Inprogress Record:** No

The 'Match Field Definition' section shows:

- Relationship Name:** Material Master-SAP
- Object Name:** Material_TATA
- Field Name:** MATERIAL_DESCRIPTION
- MatchType:** Algorithm
- Weightage:** 100

A 'Weightage Split' table is visible, showing a split of 70-100=100. The 'Match' step in the process diagram is represented by a yellow circle with a magnifying glass icon, followed by a green circle with a percentage icon.

Data Quality done in multiple simplified Bucketed steps to give you clean and complete data:

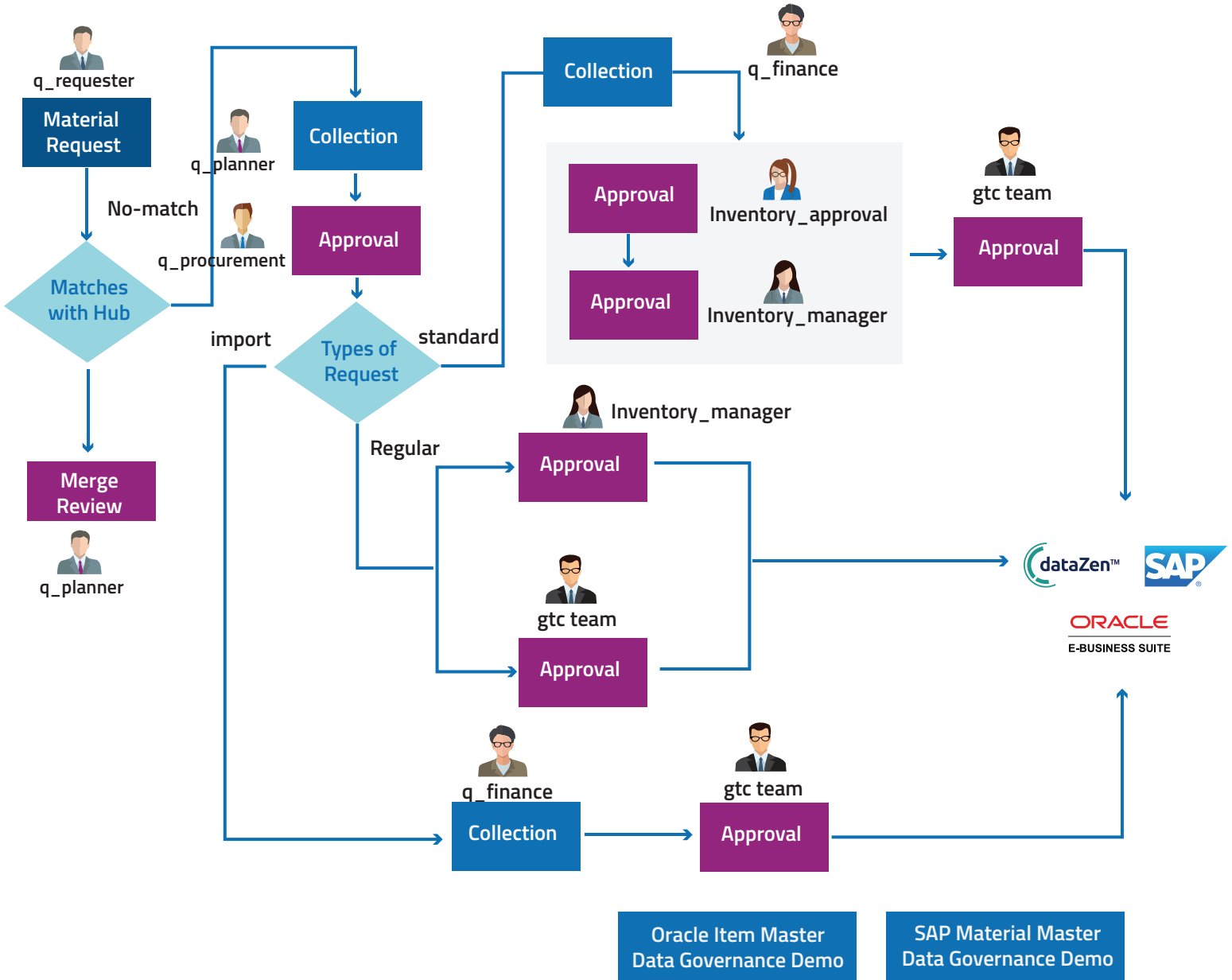
The screenshot shows the DataZen configuration interface for a 'Quality_Process' workflow. The main area displays a complex process diagram with the following steps:

- Start** (black box)
- Material_Filter** (diamond icon)
- Filter** (yellow circle with magnifying glass icon)
- Match** (green circle with percentage icon)
- Review** (yellow circle with magnifying glass icon)
- NoMatches** (yellow circle with magnifying glass icon)
- Match** (yellow circle with magnifying glass icon)
- Review** (yellow circle with magnifying glass icon)

The process diagram is divided into three main sections by vertical lines, each containing a 'Match' and 'Review' step. The 'Match' steps are represented by green circles with percentage icons, and the 'Review' steps are represented by yellow circles with magnifying glass icons. The 'Material_Filter' step is a diamond icon, and the 'Start' step is a black box.

Data Governance process for Customers:

Configure your Governance workflow with a simple drag and drop interface. Reduce the time for onboarding and improve the quality of data stewardship with achieving SLA, which is out of the box feature. A simple to complex workflow needs can be easily configured using the ChainSys Governance workflow engine. A clear reporting and notifications are provided to see the current status of each of your requests.



Screen Shots:

Notification screen for New, Modify Customer Requests, and Completed Requests.

The screenshot shows the SAP Material Master Actions interface. At the top, there are filters for 'Total Requests' (13), 'Pending Requests' (7), and 'Completed Requests' (4). Below these are sections for 'New Requests' and 'Modify Requests', each with sub-filters for 'In Process', 'In Approval', and 'Completed'. The main area contains a table with the following data:

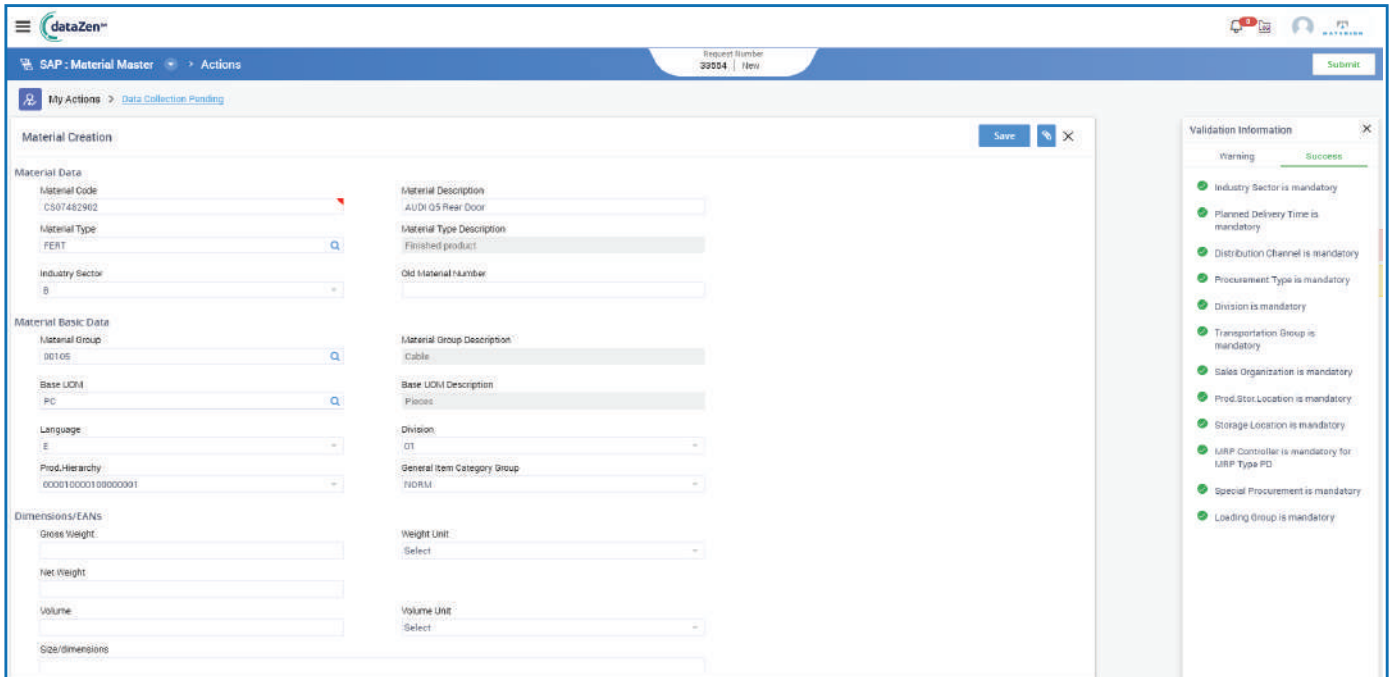
Actions	Request Number	Status	Material Code	Material Description	Base UOM	Material Type	Material Type Descript	Industry Sector	Activity	Requested On
...	33164	In Collection	C507482602	AUDI Q5 Rear Door	PC	FERT	Finished product	B	DC_03_Import	12-MAY-2020 09:01
...	33343	In Collection	C907781900	BMW 550I SPORT FRO...	PC	FERT	Finished product	B	DC_01_std	12-MAY-2020 05:08
...	25367	In Collection	C500090688	Three jaw chuck	PC	FERT	Finished product	A	DC_02_Page	18-APR-2020 01:25
...	23338	In Collection	C500000744	Motherboard Holder CEB	PC	FERT	Finished product	A	DC_02_Page	18-APR-2020 01:12
...	23366	In Collection	C500090695	6 inch nut	PC	FERT	Finished product	A	DC_01_std	18-APR-2020 12:59
...	25357	In Collection	C084270723	Motherboard Holder - G...	PC	FERT	Finished product	A	DC_01_Standard	17-APR-2020 02:52
...	11360	In Collection	RE12081802	Rim Alloy 12"				Select	DC_03_Regular	17-APR-2020 05:38

Workflow Process Steps and Current Status:

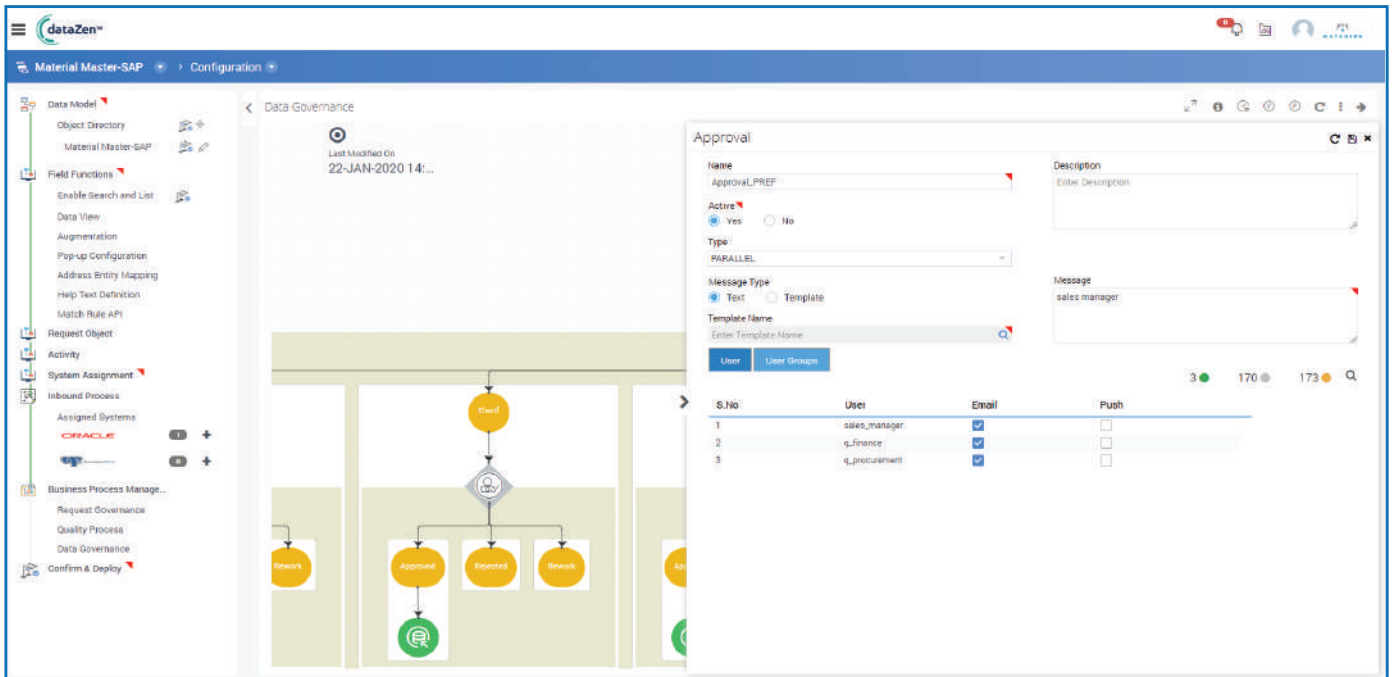
The screenshot shows the 'Request Details' page for request number 33554. The 'Activities' tab is active, displaying a timeline of actions:

- Request Submit**: Completed on 12-MAY-2020 09:01. Action Done by a_requester (suriya@gmail.com).
- Collection DC_03_Import**: In Progress from 12-MAY-2020 09:01 to -. Action Progress by q_planner (qplanner@chainsys.com).
- Approval AP_05_Import**: Yet to Process. Action yet to Progress by q_procurement.
- Collection DC_05_Import**: Yet to Process. Action yet to Progress by q_finance.
- Approval AP_09_Import**: Yet to Process. Action yet to Progress by gtc_team.
- Move to Hub**: Not yet started.

Screen Configured using Standard Layout for Customer Master for Data Request / Stewards / Owners: Online Validations with Standard Rules and allows to Customize rules



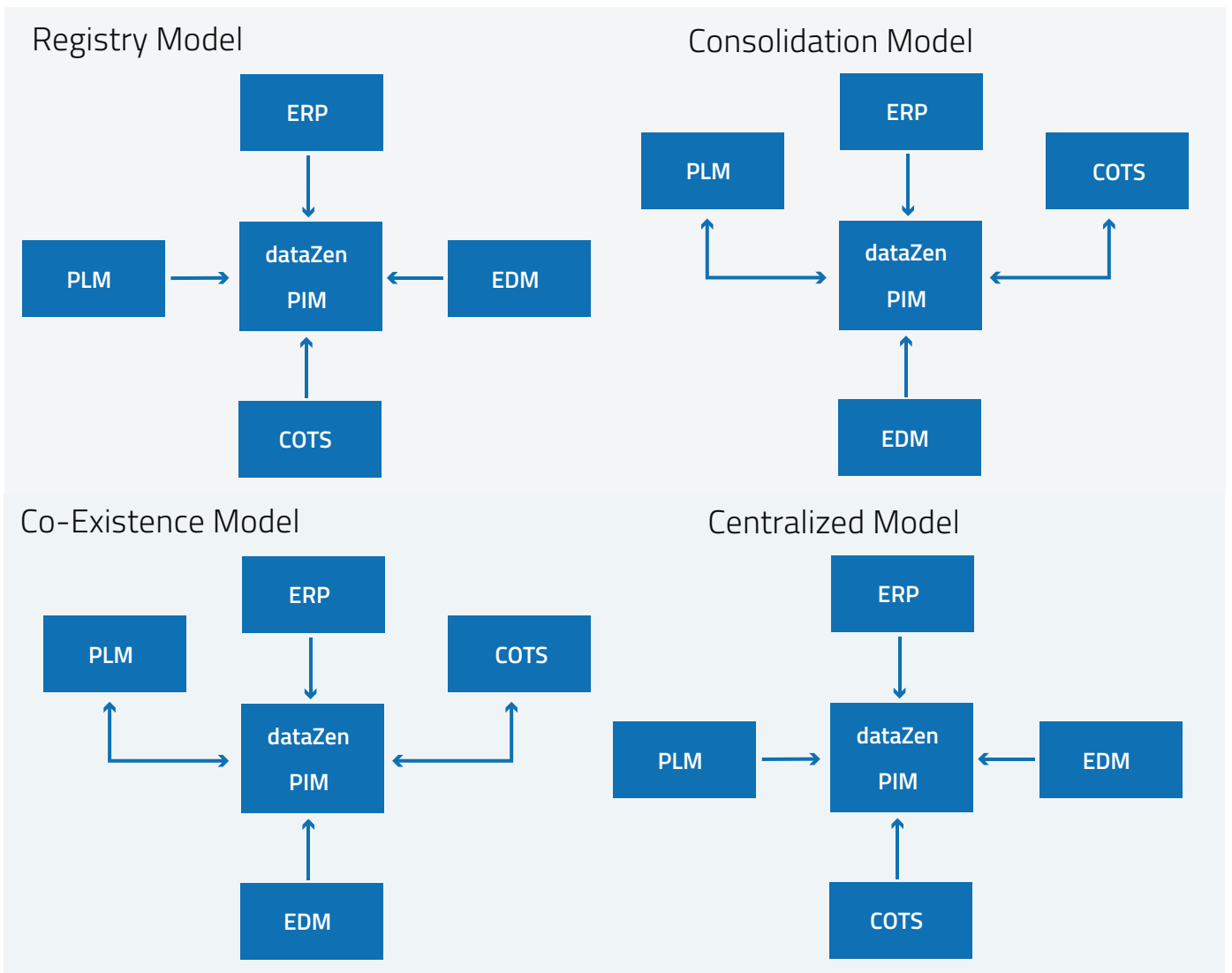
Data Governance Workflow Configurations: Its Finally Easy!!



MDM Implementation Models:

dataZen support Registry, Consolidation, Co-existence and Centralized MDM models for implementations. Let's see which model applies when?

<p>Registry</p> <p>When you want to store only the unique columns from multiple systems for synchronization.</p>	<p>Consolidation</p> <p>When you want to build an MDM model for Analytical purpose.</p>
<p>Co-Existence Model</p> <p>When there is a need for Centralization plus De-centralization of data ownership and stewardship actions.</p>	<p>Centralized Model</p> <p>When there is only need for centralization in data ownership and stewardship</p>



Roles within Customer MDM

Its important to form a strong MDM team to create a strong Data driven organization. Here are some tips for the same. We will provide you more detailed recommendations during the implementation period.

Administrators	Business Users
<p>Architect: Responsible for configuring the dataZen application to the requirements for Data Quality Rules, Governance Workflows and Integrations. Makes the changes in development, check-in the objects into the versioning tool, migrates the changes into the production instance of dataZen. Either IT or a Power User can take this role.</p> <p>System Administrator: Responsible for applying patches, shut-down, restart of the dataZen applications, backups, recovery etc. IT DBA's are generally given this role</p>	<p>Data Requestors: Responsible for requesting for new master products or modify existing products.</p> <p>Data Stewards: Responsible for collecting additional data required for completing the product attribution. Domain wise stewards would be great to have like Finance, Materials management, Sales, Manufacturing, Planning, Maintenance/MRO, Service, Self-service etc.</p> <p>Data Owners: Responsible for reviewing the actions performed by the requestors and stewards and approve or reject or send for rework against each request.</p>

Customer Master Domain

Supplier Master Domain

Supported Endpoints (Partial)

Oracle Sales Cloud, Oracle Marketing Cloud, Oracle Engagement Cloud, Oracle CRM On Demand, SAP C/4HANA, SAP S/4HANA, SAP BW, SAP Concur, SAP SuccessFactors, Salesforce, Microsoft Dynamics 365, Workday, Infor Cloud, Procore, Planview Enterprise One

Cloud Applications

Oracle E-Business Suite, Oracle ERP Cloud, Oracle JD Edwards, Oracle PeopleSoft, SAP S/4HANA, SAP ECC, IBM Maximo, Workday, Microsoft Dynamics, Microsoft Dynamics GP, Microsoft Dynamics Nav, Microsoft Dynamics Ax, Smart ERP, Infor, BaaN, Mapics, BPICS

Enterprise Applications

Windchill PTC, Oracle Agile PLM, Oracle PLM Cloud, Teamcenter, SAP PLM, SAP Hybris, SAP C/4HANA, Enovia, Proficy, Honeywell OptiVision, Salesforce Sales, Salesforce Marketing, Salesforce CPQ, Salesforce Service, Oracle Engagement Cloud, Oracle Sales Cloud, Oracle CPQ Cloud, Oracle Service Cloud, Oracle Marketing Cloud, Microsoft Dynamics CRM

PLM, MES & CRM

Oracle HCM Cloud, SAP SuccessFactors, Workday, ICON, SAP APO and IBP, Oracle Taleo, Oracle Demantra, Oracle ASCP, Steelwedge

HCM & Supply Chain Planning

Oracle Primavera, Oracle Unifier, SAP PM, Procore, Ecosys, Oracle EAM Cloud, Oracle Maintenance Cloud, JD Edwards EAM, IBM Maximo

Project Management & EAM

OneDrive, Box, SharePoint, File Transfer Protocol (FTP), Oracle Webcenter, Amazon S3

Enterprise Storage Systems

HIVE, Apache Impala, Apache Hbase, Snowflake, mongoDB, Elasticsearch, SAP HANA, Hadoop, Teradata, Oracle Database, Redshift, BigQuery

Big Data

mangoDB, Solr, CouchDB, Elasticsearch

No SQL Databases

PostgreSQL, Oracle Database, SAP HANA, SYBASE, DB2, SQL Server, MySQL, memsql

Databases

IBM MQ, Active MQ

Message Broker

Java, .Net, Oracle PaaS, Force.com, IBM, ChainSys Platform

Development Platform

One Platform for your

End to End

Data Management needs

Smart Data Platform™



Data Migration
Data Reconciliation
Data Integration



Data Quality Management
Data Governance
Analytical MDM



Data Analytics
Data Catalog
Data Security & Compliance

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