CLEARMDM

Training – Job Runs Module

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This document provides initial training on the Jobs function within clearMDM. This document does not go into technical detail and is intended to compliment other clearMDM training modules.

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Job Runs Introduction

The Jobs function is the process that executes the Normalisation, Merge, Matching etc within clearMDM. The Job itself can be scheduled to run immediately or scheduled to run on a more regular basis at a set day and time that best suits your organisation.

The following exercises will help provide a clearer understanding on how to execute the Job Runs.

Step 1 – Schedule a Job

Normalisation is the first step of the MDM process within clearMDM. This can be scheduled via a Job Run.

It provides two functions. The first is to standardise fields and secondly to populate a blocking key (further information on Normalisation can be found within the Normalisation Training Module).

Within your Salesforce Sandbox complete the following:

Exercise:

1. Within Application Settings tick the 'Is Active?' Checkbox.
2. Click on the Target Object tab and tick the 'Is Active?' In Normalisation Settings. (this may already be ticked).
3. Click on the Jobs tab.
4. For the purposes of this exercise we will schedule a job to run immediately.

   - Select Normalisation from the Job dropdown.
   - Select the Target Object from the dropdown, which in this exercise is Person Account.
   - Select the process count to 1.
   - Schedule now from the dropdown.

5. Click on the Schedule Job button.

Step 2 – Running a Job

Once the Job has been scheduled you will see it as pending in the Running Jobs list with a status of queued. There isn't anything you need to do at this point (unless you want to stop it in which case click on the Abort action). Otherwise refresh the page until it has completed.

Step 3 – Completed Job

Once the Job has run, it will show in the Completed Jobs table. It will also show how many batches have been processed and any failed batches.

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By clicking on view, this will provide a further breakdown of information for this Job and also any audit logs that have been generated as part of the process. This will come in useful if any batches failed and help identify why. At this point you can view records in the PersonAccount object and you will see the blocking key will have been generated. (You can customise the mdm fields displayed by editing the record template and layout).

Step 4 – Further Jobs

Once Normalisation has completed you can now schedule further jobs to run, I.e. Matching. You can also setup the jobs to run consecutively. The following exercise demonstrates how to do this:

1. Navigate to settings and click on the Target Objects tab.
2. Select the Target Object you are using (for the purposes of this we are using Person Account).
3. Scroll down through each setting (tab) and click on the 'Is invoked by?' Checkbox.
4. Save the settings changes.
5. If you want to see this in action then return to the jobs tab and completed step1.
6. You will notice the Match job starts as soon as the Normalisation job is complete.

Step 5 – Scheduling Jobs in the future

As stated earlier, you can schedule jobs to run at a specific day and time. In order to do this follow this exercise:

Exercise:

1. Click on the Jobs tab.
2. Select the Normalisation job from the job dropdown.
3. Select the target object this job relates to from the dropdown.
4. Process count as 1.
5. From the schedule dropdown select whether you want this to run hourly, daily, weekly or monthly.
6. Select the day the Job should run.
7. Select the time it should start (in hours).

This will now schedule the Job to run on the specified day and time. The other Jobs will also run on these days/time if they have been setup as per step 4.

This concludes the Jobs Training Module.