

Training – Data Services Module

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This document will provide initial training for the Data Services function within clearMDM. It's intended to introduce how to setup Data Services based upon limited or no experience using clearMDM. This document does not explain the technical aspect or discuss the other functions within clearMDM. More detailed technical information can be found in the quick start guides located here clearMDM.com

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Data Services Function Introduction

Data Services within clearMDM provide the ability for record cleanse, verification, or improved quality services via the use of External API connectors.

Fields are added to the Data Service Setting which in turn will be monitored for any changes made within the record source. Any updates to these fields will generate an update request to the external API connector.

This update can be applied one of two ways; transactional or scheduled.

If the Data Service is set to transactional (within Data Service settings), then as soon as the field changes value, the update request will occur. Otherwise, the update is scheduled to run at a certain date and time.

This operation can also be performed if running a Matching Test and manually merging records.

The steps below will help understand how to setup the Data Service:

Step 1 – Setup the Data Service within Settings

1. Click on Settings within clearMDM.
2. Click on Data Services.
3. To create a new Data Service, click on Add.
4. Enter the name of the Data Service.
5. Select the Target Object it relates to.
6. Check the tickbox, Is Insert Active?
7. Check the tickbox, Is Update Active?
8. Check the tickbox, Is Transactional?
9. Insert the Connector Apex Class Name.
10. You can leave the Max Requests per Connector Call to 100 or change.
11. The Filter Field Name should be set to MDM Status.
12. The Filter Field Value should be set to Merge Source.
13. Enter the User Profile Id Exclusion List.
14. Select the Is Active for Update Field Name as Is Active For Update?
15. Select the Last Update Date Field Name as Last Data Services Update Date.
16. Click on Save.

The Data Service has been setup.

Step 2 – Setup the Data Service within Settings for Manual Merge

To trigger the Data Service after a Manual Merge, setup the Data Service Settings as follows:

1. Click on Settings within clearMDM.
2. Click on Data Services.
3. To create a new Data Service, click on Add.
4. Enter the name of the Data Service.
5. Select the Target Object it relates to.

6. Check the checkbox, Is Transactional?
7. Enter the Connector Apex Class Name.
8. Enter the User Profile ID Exclusion List.
9. Select the Last Update Date Field Name to Last Data Services Update Date.
10. Select the Is Active for Update Field Name to Is Active for Update?
11. Enter the Platform Event name as clearmdm__ManualMerge__e.
12. Click on save.

The Data Service has been setup for Manual Merge.

Step 3 – Trigger the Data Service via a Manual Merge

For this process to work it is assumed the environment is setup to trigger an external API update by processing a Manual Merge.

1. Create two new records within the Target Object.
2. Ensure they are not going to trigger the automated Data service by making sure the Blocking Key is different. (This is dependent upon the Blocking Key setup in Normalisation).
3. Navigate to Matching Test within clearMDM.
4. Search for the two records just created.
5. Select Next.
6. Click on Merge.
7. Within the Data Service Update Requests tab click on go.
8. The Manual Merge Data Service will be displayed.
9. The Status will change to complete once processed.

Step 4 – Add fields to a Data Service for Change Monitoring.

When the Data Service is setup and set to Is Active Update? fields need adding that will be monitored for changes.

1. Click on settings within clearMDM.
2. Click on Data Services.
3. Edit the relevant Data Service.
4. Under the fields section click on Add.
5. Select the field that needs to be monitored for change.
6. Check the Is Active? checkbox.
7. Repeat this until all fields have been added.
8. Click on save.

The fields monitored for change within the records have been added.

Step 5 – Trigger a Data Service Update by changing a Monitored Field.

Once the monitored fields have been setup, you can test this.

1. Within the Target Object identify a Matched record pair with a Master Record.
2. Within the Master Record make an amend to a monitored field.
3. Click on save.
4. Within clearMDM go to the Data Services Update Requests Tab.
5. The Data Service will be displayed.
6. The status will change to complete once processed.

New Features

Is Isolated Processor?

New settings have been added to allow Data Services to run in parallel when processing. The 'Is Isolated Processor?' checkbox if set to TRUE, then the Data Service Update Requests for the Data Service are processed by a separate processor instance. This setting provides control over parallel DSUR processing for Transactional Data Services only. 'Isolated Connector Calls per Cycle' determines the number of DSUR processed per Isolated Processor cycle which is calculated as [Max Records per Connector] multiplied by [Isolated Connector Calls per Cycle].