Informatica® MDM - Supplier 360
10.1 HotFix 5

Installation and Configuration Guide
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Preface

This guide is intended for MDM administrators. Administrators use the guide to install, configure, and customize the Informatica MDM - Supplier360 Application. For more information about configuring the underlying Informatica MDM ME environment, see the Informatica MDM Multidomain Edition Configuration Guide.

Informatica Resources

Informatica Network


As a member, you can:

- Access all of your Informatica resources in one place.
- Search the Knowledge Base for product resources, including documentation, FAQs, and best practices.
- View product availability information.
- Review your support cases.
- Find your local Informatica User Group Network and collaborate with your peers.

Informatica Knowledge Base

Use the Informatica Knowledge Base to search Informatica Network for product resources such as documentation, how-to articles, best practices, and PAMs.

To access the Knowledge Base, visit https://kb.informatica.com. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at KB_Feedback@informatica.com.

Informatica Documentation

To get the latest documentation for your product, browse the Informatica Knowledge Base at https://kb.informatica.com/_layouts/ProductDocumentation/Page/ProductDocumentSearch.aspx.

If you have questions, comments, or ideas about this documentation, contact the Informatica Documentation team through email at infa_documentation@informatica.com.
Informatica Product Availability Matrixes

Product Availability Matrixes (PAMs) indicate the versions of operating systems, databases, and other types of data sources and targets that a product release supports. If you are an Informatica Network member, you can access PAMs at


Informatica Velocity

Informatica Velocity is a collection of tips and best practices developed by Informatica Professional Services. Developed from the real-world experience of hundreds of data management projects, Informatica Velocity represents the collective knowledge of our consultants who have worked with organizations from around the world to plan, develop, deploy, and maintain successful data management solutions.

If you are an Informatica Network member, you can access Informatica Velocity resources at


If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at ips@informatica.com.

Informatica Marketplace

The Informatica Marketplace is a forum where you can find solutions that augment, extend, or enhance your Informatica implementations. By leveraging any of the hundreds of solutions from Informatica developers and partners, you can improve your productivity and speed up time to implementation on your projects. You can access Informatica Marketplace at https://marketplace.informatica.com.

Informatica Global Customer Support

You can contact a Global Support Center by telephone or through Online Support on Informatica Network.

To find your local Informatica Global Customer Support telephone number, visit the Informatica website at the following link:


If you are an Informatica Network member, you can use Online Support at http://network.informatica.com.
CHAPTER 1

Introduction to Informatica MDM - Supplier 360

This chapter includes the following topics:

- Informatica MDM - Supplier 360 Application Overview, 9
- Architecture, 11
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- User Roles, 13
- Business Processes for Supplier Management, 14
- Product Information Management Integration, 16

Informatica MDM - Supplier 360 Application Overview

Informatica MDM - Supplier 360 (S360) provides clean, consistent, and connected information about suppliers. Business managers use this master supplier data to make better business decisions about suppliers and to implement processes that can save the organization money.

With S360, business users can achieve the following goals:

- Automate supplier applications and profile maintenance with the Supplier Portal.
- Streamline the supplier onboarding and qualification processes.
- Centralize data about suppliers in a master database.
- Enrich supplier data with related information, such as compliance documents, for a true 360 degree view of a supplier.
- Reflect relationships among suppliers, parent companies, subsidiaries, and subsuppliers.
- Alert business managers to existing and upcoming compliance issues.
- Analyze suppliers based on attributes, such as performance, location, products, services, and invoices.
- Connect supplier data with the supplier product catalogs.
- Distribute trustworthy supplier data to business applications and analytical applications across the organization.

S360 is an application designed for Informatica Master Data Management Multidomain Edition (Informatica MDM). Business users connect to master supplier data through a business-friendly user interface, which displays an enterprise-level dashboard as well as 360 degree supplier views that are customized for different business users.
You can add optional products to your S360 environment. When the environment includes a Product Information Management (PIM) system, such as Informatica Product 360 (PIM), suppliers can remotely upload product catalogs to the PIM system. When the environment includes Data-as-a-Service, all supplier contact information goes through a validation process.

S360 contains the following components:

- Supplier Relationship Management
- Supplier Portal
- Product Information Management Integration

Example

A global automobile manufacturer experiences multiple issues with its supply chain. The management team has poor insight into everything from the total spend with a supplier to supplier performance.

Total spend is virtually impossible to assess. The manufacturer has hundreds of suppliers, and the supplier information is dispersed across multiple systems in different geographic areas. The same supplier can be in the systems under slightly different supplier names. The manufacturer holds multiple locally negotiated contracts with a supplier. Without a complete picture, the contract terms do not reflect the total spend with a supplier.

The management team does not have insight into supplier overall performance, such as the percentage of orders delivered on time over the last year. Therefore, managers do not take action to resolve performance issues. Late or incomplete shipments of parts continuously affect the supply chain. In some cases, managers have not lined up alternative suppliers for parts, so when parts are unavailable from one supplier, the manufacturing line falters.

Finally, the organization is acquiring another company later in the year. The management team wants a solution in place before that acquisition completes.

Informatica Solution

The IT department implements Informatica MDM - Supplier 360 (S360). An administrator loads data from source systems into S360, which includes a centralized database for master supplier profiles. Within the centralized database, the application identifies potential duplicate suppliers.

Data stewards review potential duplicate suppliers and merge the supplier profiles as appropriate. Data stewards edit supplier profiles and set up supplier relationships by identifying parent companies and their subsidiaries. Whenever a data steward modifies a record that is part of a supplier profile, the data steward sends the record for review through an online business process.

With the reviewed and approved master data in place, data stewards send invitations to all qualified suppliers to register on the Supplier Portal. Registered qualified suppliers can update their information, add product catalogs, and monitor their performance. Other suppliers use the Portal to apply to become a supplier to the organization. Online application forms go through an online onboarding and qualification process.

Managers participate in reviews of supplier applications and monitor supplier performance and compliance. When business managers identify compliance and performance issues, they create alerts to notify suppliers of the issues. Managers edit supplier profiles and initiate a change-approval review from the Data workspace. Managers identify alternative suppliers for all key parts and invite the suppliers to complete an online application through the Portal.

Results

Within the first year, the organization realized savings in the following areas:

- Saved on purchase prices by negotiating with suppliers to provide single favorable contracts for all locales, including volume discounts and early payment discounts
Reduced costly delays in the supply chain by using alternative suppliers for parts and by monitoring and correcting supplier performance

Reduced administrative costs by implementing a self-service approach for new suppliers to apply online and for existing suppliers to maintain their supplier data online

Reduced administrative costs by using an automated business process for the qualification workflow

Reduced the costs of integrating supplier data after the acquisition by adding the acquired systems as source systems to the MDM Hub

Architecture

The Application requires Informatica MDM Multidomain Edition with Informatica Data Director and the embedded Informatica ActiveVOS Server. For mapping data, you can use any ETL product, such as Informatica PowerCenter. For product catalogs, you can use any Product Information Management system, such as Informatica Product 360.

The following diagram shows Supplier Relationship Management in the center and the Supplier Portal to the right. The inputs to the MDM Hub are internal and external data sources. A PIM system is optional.

Supplier Management

S360 adds features to the Informatica MDM environment, such as a database schema for supplier data, business processes for supplier management, and an interface that business users use to access supplier data.

Supplier relationship management includes qualification of a supplier, supplier profile management, and assessment of the supplier performance.
Informatica Master Data Management Multidomain Edition

Supplier Relationship Management includes the standard Informatica MDM components:

**Hub Store**

Databases that store and consolidate business data. The Hub Store consists of an MDM Hub Master Database and Operational Reference Stores. The Application ships with a database schema that you use to create an Operational Reference Store for supplier master data.

**Hub Server**

A J2EE application that you deploy on an application server. The Hub Server processes data within the Hub Store and integrates the MDM Hub with external applications. The Hub Server is the run-time component that manages core and common services for the MDM Hub. It also manages user authentication across all components.

**Process Server**

A J2EE application that you deploy on an application server. The Process Server cleanses and matches data and performs batch jobs such as load, recalculates best version of the truth, and revalidates. The Process Server interfaces with cleanse engines to standardize the data and to optimize the data for match and consolidation.

**ActiveVOS Server**

Business process management software that automates business processes. The Application ships with business processes that help you to manage the supplier lifecycle. These processes ensure that authorized business managers review supplier applications and review internal updates to master data.

**Informatica Data Director**

A browser-based interface that business managers use to view and manage data. The Application ships with Supplier 360, which contains an enterprise-level Start workspace focused on suppliers and customizable Entity 360 views designed for business managers.

**Hub Console**

A browser-based interface that administrators use to manage the MDM Hub and data stewards use for managing records and batch processing of records.

**Supplier Portal**

The Supplier Portal (Portal) is a web application that you implement in a public-facing website. Suppliers use the Portal to initiate and maintain a supplier relationship with your organization.

The Portal requires that users log in. The MDM Server manages user authentication through its Security Access Manager.

**Product Information Management Integration**

Product Information Management (PIM) systems create a single repository for all product data. In S360, a PIM system is an optional component. When the Application environment includes a PIM system, suppliers can upload their product catalogs from the Supplier Portal.

When Informatica Product 360 is pre-installed, the Application integrates Informatica MDM and the Supplier Portal with Informatica Product 360 (PIM) through an MDM-PIM adapter. The MDM Hub Server manages user authentication with Informatica Product 360 through its Security Access Manager and a customized security provider.
If you want to integrate the Application with a third-party PIM system, contact your Informatica representative. Your representative can request the customization of the MDM-PIM adapter for the third-party PIM system.

Supplier Data Models and Database Schema

You configure an Operational Reference Store (ORS) to use a database schema designed for supplier data. The Application ships with a conceptual data model, a logical data model, and the database schema.

Conceptual Data Model for Supplier Data

The conceptual data model presents the entities, attributes, and relationships for supplier data.

Logical Data Model for Supplier Data

The logical data model presents the structure of the ORS for supplier data, including the tables, columns, foreign key relationships, and lookups.

Database Schema for Supplier Data

The database schema contains the base object tables, staging tables, and other elements required to create the schema for supplier data. You have a choice about whether you start the implementation with empty tables or whether you start with reference data. If you use the reference data, some of the repository tables are set up for you.

You can find the data model diagrams and a description of the database schema in the distribution package.

User Roles

MDM Hub user roles control read and write privileges in the Operational Reference Store that contains the supplier master data.

The Application has the following MDM Hub user roles:

User roles for system users

User roles for system users include Application Administrator, Data Steward, and Data Entry Operator. The Application Administrator role is for a super user, who has full privileges.

User roles for business users

User roles for business users control the data privileges in the Operational Reference Store and also the review privileges in business processes. Each business user who is authorized to participate in supplier management receives one or more role assignments. Many people can have the same role.

S360 includes predefined roles for the following business users:

- Commodity Manager
- Finance Manager
- Contracts Manager
- Compliance Manager
User roles for the Supplier Portal

User roles for the Portal control which pages can be edited and by whom. When an authorized supplier representative edits a page, the data in the Operational Reference Store is updated.

S360 includes the following predefined roles in the MDM Hub:

- Supplier Administrators
- Supplier Users

User Authentication

The MDM Hub manages user authentication across the MDM Hub, Supplier Portal, Supplier 360, and a PIM system. You only need to sign in once.

Business Processes for Supplier Management

Business processes help you automate some common supplier lifecycle management workflows.

The Application ships with ActiveVOS business processes for the following workflows:

- Create a supplier (initiated from the Supplier Portal)
- Create or update a supplier profile (initiated from Supplier 360)
- Delete a supplier (initiated from Supplier 360)

For more information about the business processes, see the chapter on Business Processes for Supplier Management.

Supplier Profile

After a supplier is approved, the supplier application is converted to a supplier profile. The supplier profile contains all the information from the application.

Supplier representatives use the Supplier Portal to view their supplier profile. When a supplier representative signs on to the Portal, the representative sees the Welcome dashboard. In the left navigation panel under Company, the links summarize the information that makes up the supplier profile. In the display area, the representative can see messages, links to catalogs, notifications, renewal alerts, invoices, and some performance metrics. Authorized supplier representatives can modify information, add supporting documentation, upload catalogs, and monitor performance.

Business users use Supplier 360 to open and view supplier profiles. A data steward can edit data in the supplier profile, send notifications to the supplier, and change the status of a supplier. A data steward can also create supplier profiles.

If the Supplier Portal connects to a Product Management Information (PIM) system, the product catalog upload and product catalog management operations are available to the suppliers. The supplier must have the necessary permissions to upload and edit product catalogs.
The following image shows the Supplier Portal user interface when the environment has a PIM system:

The following image shows the Supplier Portal user interface when the environment does not have a PIM system:

Storage for Supplier Documents

When the Operational Reference Store (ORS) resides in an Oracle database or a Microsoft SQL Server database, you can upload documents to the ORS. Documents can include proof of insurance, certifications, or any other documentation required by your organization.

You can upload documents in any of the following file formats: .pdf, .doc, .png, and .jpg. The ORS stores the files as blobs (binary large objects) and the metadata about the stored files resides in a FILE_METADATA table, which is a child table of the party base object (PARTY_BO).

Supplier 360

Business managers use Supplier 360 to access supplier master data. Supplier 360 runs in Informatica Data Director and acts on the supplier records stored in the Operational Reference Store that contains supplier data.

Business managers can view enterprise-level information about suppliers and view 360 degree information about a supplier. From the Start workspace, managers participate in the review process and monitor all suppliers. From the Data workspace, managers can edit supplier profiles, change the status of a supplier profile, create alerts that appear in the Supplier Portal, and launch the Entity 360 views. From the Entity 360
views, managers monitor supplier compliance and monitor supplier performance. After editing a supplier profile, the manager can initiate a business process where other business managers review and approve the edits.

Online Supplier Application Form

When a supplier wants to become a supplier to a buyer organization, the supplier registers on the Supplier Portal and completes an online supplier application form. The application form prompts the supplier to provide all the information that the buyer requires to begin a qualification process. Each page of the application focuses on a different type of information, such as general company information or banking information.

As a supplier representative fills out the application through the Portal, the MDM Hub stores the records that make up the application in a pending state in the Operational Reference Store. After the supplier representative submits the application, the application goes through a business approval process. If business users approve the application, the supplier becomes an approved supplier and the application becomes the supplier profile. In the Operational Reference Store, the state of the profile records changes from pending to active. The MDM Hub links the records to construct a 360 degree supplier profile.

The data from the application is now the official supplier profile.

Supplier Profile Maintenance

Approved suppliers use the Supplier Portal to manage their supplier profile.

Authorized supplier representatives can add contacts, monitor delivery performance, receive notifications, and keep data and certifications up-to-date. If the Application environment includes a Product Information Management (PIM) system, a supplier representative can also upload a product catalog to the PIM system.

Product Information Management Integration

When the S360 environment includes a Product Information Management (PIM) system, suppliers can view their product catalogs from the Supplier Portal. Suppliers can also upload a product catalog to the PIM system from the Supplier Portal.

MDM-PIM Adapter

The MDM-PIM adapter integrates the Application with a PIM system. The adapter handles signing into the systems and coordinates activities between the Application and the PIM system.

The adapter is preconfigured for Informatica Product 360 (PIM). If you want to integrate the Application with a third-party PIM system, contact your Informatica representative. Your representative can request the customization of the MDM-PIM adapter for the third-party PIM system.
The following table lists the actions that a business user or a supplier representative can take in one system that causes a change in the other system:

<table>
<thead>
<tr>
<th>Action</th>
<th>MDM-PIM Adapter Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Supplier 360, a business user qualifies a supplier by participating in a review process.</td>
<td>Creates a user with the same user credentials as the qualified supplier in the PIM system. Adds the PIM supplier ID to the supplier profile in the Operational Reference Store.</td>
</tr>
<tr>
<td>In the Supplier Portal, a supplier representative uploads a product catalog.</td>
<td>Replaces the product catalog in the PIM system.</td>
</tr>
<tr>
<td>In Supplier 360, a business user deactivates a supplier.</td>
<td>Deactivates the supplier in the PIM system.</td>
</tr>
<tr>
<td>In Supplier 360, a business user deletes a supplier.</td>
<td>Deletes the supplier from the PIM system and from the Operational Reference Store.</td>
</tr>
<tr>
<td>In the Supplier Portal or Supplier 360, a supplier representative or a business user adds users as contacts.</td>
<td>Creates users in the PIM system with the same user credentials.</td>
</tr>
<tr>
<td>In the PIM system, a business user changes supplier information.</td>
<td>Updates the supplier information in the Operational Reference Store.</td>
</tr>
</tbody>
</table>

Product Catalogs

When the S360 environment includes a Product Information Management (PIM) system, suppliers can view and upload their product catalogs from the Supplier Portal.

Business managers can upload catalogs from the PIM system user interface.
CHAPTER 2

S360 Installation Overview

This chapter includes the following topics:

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- Read the Release Notes, 18
- Verify Software Requirements, 19
- Pre-installation Tasks, 19
- Installation Topology, 20
- Install the S360 Application, 20
- Post-installation Tasks, 20

Installation Overview

The S360 application requires Informatica MDM Multidomain Edition and, optionally, a Product Information Management system, such as Informatica Product 360 (PIM). You must install these products before you install the Application.

You receive S360 as an archive file. The archive contains configuration files, template files, and a setup script. You edit the configuration files to specify properties that reflect your environment. You also need to replace template files with customized files, such as replacing the placeholder logo file with a file containing your organization logo. Then you can run the setup script.

Installation of S360 consists of the following steps:

1. Read the Release Notes.
2. Verify the software requirements.
3. Perform the pre-installation tasks.
4. Install the application.
5. Complete the post-installation tasks.

Read the Release Notes

Read the MDM - Supplier 360 Release Notes for updates to the installation and upgrade process. You can also find information about known limitations for the release.
Verify Software Requirements

Set up the Informatica MDM Multidomain Edition environment before you install S360.

Perform the following tasks:


2. Install a supported version of Informatica MDM, including Informatica Data Director and the embedded version of Informatica ActiveVOS Server. Follow the instructions in the Informatica MDM Multidomain Edition Installation Guide or the Informatica MDM Multidomain Edition Upgrade Guide for your environment.

   Note: When you create the Operational Reference Store, you must use the name supplier_hub.

3. If using a PIM system, install a supported version of Informatica Product 360 (PIM) or a third-party PIM product.

   Note: If you want to integrate the Application with a third-party PIM system, contact your Informatica representative. Your representative can request the customization of the MDM-PIM adapter for the third-party PIM system.

Verify Minimum System Requirements

S360 requires the same system requirements as Informatica MDM.

To use the Supplier Portal, enable cookies in the browser.

For more information about product requirements and supported platforms, see the Product Availability Matrix: https://network.informatica.com/community/informatica-network/product-availability-matrices.

Pre-installation Tasks

To configure the S360 application, you must perform the following tasks:

1. Extract the Application archive.
2. Import resources into the MDM Hub.
3. Import Entity 360 into Informatica Data Director.
4. Set configuration properties.
5. Install the Application Configuration tool and enable the data view.
6. Set the global application properties.
7. Configure the supplier portal.
8. Configure the email templates.
9. Configure a Product Information Management system.
Installation Topology

You can run S360 application with or without Informatica Product 360 (PIM).

Based on your requirements, use one of the following installation topologies:

**With PIM**

If you run the application with PIM, the Supplier portal uses the following Informatica Product 360 services:

- Timeline, which shows updates from Informatica Product 360
- Product catalog upload
- Product catalog management
- User authentication and user management, including password resets.

**Without PIM (standalone mode)**

If you run the application without PIM, all the PIM services are hidden in the user interface.

If you run the application without PIM, you must build a custom adapter to handle user authentication and user management. You must also build email templates for ActiveVOS to handle user invitations and password resets.

For more information about configuring a custom adapter, contact your Informatica representative.

Install the S360 Application

After you finish the pre-installation tasks, install S360 by running the `install-tsr` script.

Post-installation Tasks

To complete the configuration, perform the following post-installation tasks:

1. Configure the MDM Hub.
2. Configure the Operational Reference Store.
3. Populate the S360 charts with data.
4. Configure the ActiveVOS email service.
CHAPTER 3

Before You Install

This chapter includes the following topics:

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- Configure the Supplier Portal, 36
- Configure Email Templates, 41
- Configure Product Information Management, 45

Extract the Application

You receive the S360 application as an archive file. Create the following directory structure and extract the contents of the S360 archive file into it:

<MDM Installation Directory>/app/tsr

The extracted content contains the following files and folders:

- bin/. Contains build files, the setup script, and an uninstall wizard.
- bpm/. Contains the ActiveVOS email service and the default business processes in a deployable format.
- config/. Contains configuration properties files.
- datamart/. Contains the data-mart service and the chart configurations.
- email-config/. Contains the directory that defines the email templates. The email templates are used by the ActiveVOS email service.
  - templates/. Contains the avos-templates and pim-templates subdirectories with email body text templates for ActiveVOS and for Informatica Product 360.
Create the Operational Reference Store

Create an Operational Reference Store (ORS) with the schema name supplier_hub. When entering database parameters, use the parameters that you specified when you created the Oracle database instance.

**Note:** You must use the name supplier_hub. If you use a different name, the integration with Informatica Product 360 (PIM) does not work.

1. Navigate to the following directory:
   ```<MDM installation directory>/hub/server/bin```

2. Run one of the following commands:
   - On Windows. `sip_ant.bat create_ors`
   - On Linux. `sip_ant.sh create_ors`

3. Enter values for the ORS parameters.
   **Note:** The prompts display default text in brackets. Press **Enter** to use the default value and go to the next prompt.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Connection Type</td>
<td>Enter the type that you specified for the Oracle database instance.</td>
</tr>
<tr>
<td>Operational Reference Store DB host name</td>
<td>Enter the IP address of the host running Oracle.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Operational Reference Store DB port number</td>
<td>Enter the port number that Oracle uses.</td>
</tr>
<tr>
<td>Operational Reference Store DB service name</td>
<td>If the Oracle Connection Type=service, enter the name of the Oracle service that you specified for the Oracle database instance.</td>
</tr>
<tr>
<td>Oracle Net connect identifier</td>
<td>Enter the TNS name that you specified for the Oracle database instance.</td>
</tr>
<tr>
<td>Connect URL</td>
<td>Use the default URL unless you are required to change the URL for business reasons or technical reasons.</td>
</tr>
<tr>
<td>Operational Reference Store DB user name (schema name)</td>
<td>Enter supplier_hub.</td>
</tr>
<tr>
<td>Operational Reference Store DB user password</td>
<td>Enter a password to assign to the supplier_hub user.</td>
</tr>
<tr>
<td>Locale name</td>
<td>Enter the language to use.</td>
</tr>
<tr>
<td>DBA user name</td>
<td>Enter the user name for the Oracle database instance.</td>
</tr>
<tr>
<td>DBA password</td>
<td>Enter the password for this user.</td>
</tr>
<tr>
<td>MDM index tablespace</td>
<td>Use the default value. Creates a tablespace to contain the index components for the ORS.</td>
</tr>
<tr>
<td>MDM temporary tablespace</td>
<td>Use the default value. Creates a tablespace to contain the temporary components for the ORS.</td>
</tr>
<tr>
<td>Oracle temporary tablespace</td>
<td>Use the default value. Creates a tablespace to contain the temporary components for the database instance.</td>
</tr>
</tbody>
</table>

The script triggers the process that creates the ORS.

4. If the process fails, check the log file for errors:

<MDD installation directory>/hub/server/bin/sip_ant.log

Import the Database Schema into the Operational Reference Store

After you create the Operational Reference Store, import the database schema from a change list.

After you create the schema, you edit and upload XML files to repository tables. The XML files are required for Supplier 360.
Importing the MDM Metadata

After you create the supplier_hub Operational Reference Store (ORS), import the MDM metadata into the ORS.

1. Navigate to the following directory:
   `<MDM installation directory>/hub/server/bin`

2. Run one of the following commands:
   - On Windows: `sip_ant.bat import_ors`
   - On Linux: `sip_ant.sh import_ors`

3. Enter values for the ORS parameters.
   **Note**: The prompts display default text in brackets. Press **Enter** to use the default value and go to the next prompt.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database Type</td>
<td>Enter Oracle.</td>
</tr>
<tr>
<td>Oracle Connection Type</td>
<td>Enter the type that you specified for the Oracle database instance.</td>
</tr>
<tr>
<td>Operational Reference Store DB host name</td>
<td>Enter the IP address of the host running Oracle.</td>
</tr>
<tr>
<td>Operational Reference Store DB port number</td>
<td>Enter the port number that Oracle uses.</td>
</tr>
<tr>
<td>Operational Reference Store DB service name</td>
<td>If the Oracle Connection Type=service, enter the name of the Oracle service that you specified for the Oracle database instance.</td>
</tr>
<tr>
<td>Oracle Net connect identifier</td>
<td>Enter the TNS name that you specified for the Oracle database instance.</td>
</tr>
<tr>
<td>Connect URL</td>
<td>Use the default URL unless you are required to change the URL for business reasons or technical reasons.</td>
</tr>
<tr>
<td>Operational Reference Store DB user name (schema name)</td>
<td>Enter <code>supplier_hub</code>.</td>
</tr>
<tr>
<td>Operational Reference Store DB user password</td>
<td>Enter the password for the <code>supplier_hub</code> user.</td>
</tr>
<tr>
<td>Locale name</td>
<td>Enter the language to use.</td>
</tr>
<tr>
<td>DBA user name</td>
<td>Enter the user name for the Oracle database instance.</td>
</tr>
<tr>
<td>DBA password</td>
<td>Enter the password for this user.</td>
</tr>
<tr>
<td>Timeline granularity</td>
<td>Enter the timeline units to use.</td>
</tr>
</tbody>
</table>

**Note**: After the database schema is imported, you cannot change the timeline granularity.

The script triggers the process that loads the metadata into the ORS.
4. If the process fails, check the log files for errors. You can find log files in the following locations:
   - User input errors. <MDM installation directory>/hub/server/bin/sip_ant.log
   - Database errors. <MDM installation directory>/hub/server/bin/<database type>/seed.log

Registering the Operational Reference Store

Register the supplier_hub Operational Reference Store.

1. Log into the MDM Hub Console.
2. In the Configuration workbench, click Databases.
3. From the main menu, click Write Lock > Acquire Lock.
4. Click Register database.
   The Informatica MDM Hub Connection Wizard starts.
5. Follow the online instructions to specify the same parameters that you specified when you created the Operational Reference Store.
6. On the Summary page, click Test Database.
   The Wizard tests the database connection parameters.
7. Ensure that the Create datasource after registration check box is selected.
8. Click Finish.
9. When prompted, enter the user credentials for the application server.
   The wizard creates a data source.

Importing the Application Metadata

The metadata for the supplier database schema resides in an MDM Hub change list. You import the change list into the Hub Store. The metadata change list creates components, such as landing tables, user exits, lookup tables, staging tables, base objects, and match and merge rules. The created tables are empty.

1. In the Hub Console, in the Configuration workbench, click Repository Manager.
2. Click the Import tab.
3. Click the button next to the Source field.
   The Open Repository dialog box opens.
4. Click File Repository.
5. Navigate to the following directory:
   <MDM installation directory>/app/tsr/hub/schema/met-export
6. Select the SUPPLIER_hub_change.xml file, and click OK.
7. From the Target field, select supplier_hub.
8. Select all the schema components and click Apply.
   The Repository Manager imports the selected components from the change list.
Uploading Composite Objects and Composite Services

The application requires composite objects and composite services to support the Start workspace and Entity 360 views in S360. Upload files to the repository table C_REPOS_CO_CS_CONFIG.

**Note:** If the table contains rows, replace the files in the table.

1. In a database tool that supports the BLOB data type, open the table C_REPOS_CO_CS_CONFIG.
2. Insert rows with the following custom CONFIG_TYPE values:
   - CUSTOM_JAVA_CLASSES
   - CUSTOM_XML_SCHEMA
3. For the CUSTOM_JAVA_CLASSES row, in the CONFIG_DATA column, upload the CUSTOM_JAVA_CLASSES.jar file from the following directory:
   <MDM installation directory>/app/tsr/hub/cosconfig
4. For the CUSTOM_XML_SCHEMA row, in the CONFIG_DATA column, upload the custom.xsd file from the following directory:
   <MDM installation directory>/app/tsr/hub/cosconfig

Creating an Additional Repository Table

After you import the change list, add the C_REPOS_APP_CONFIG repository table. To add the table, run two scripts.

1. At a command prompt, navigate to the following directory:
   <MDM installation directory>/app/tsr/hub/schema/ddl
2. Use a database tool to run the following script:
   DDL_C_REPOS_APP_CONFIG_ORACLE.sql
3. Open the following file in an editor:
   DDL_S_FILE_REPOS_ORACLE
4. Edit the following line to point to the supplier_hub:
   CREATE TABLE supplier_hub.S_FILE_REPOS
5. Save the file with the file extension .sql.
6. Use a database tool to run the following script:
   DDL_S_FILE_REPOS_ORACLE.sql

Inserting Reference Data

After you import the metadata, you can populate the tables with some reference data. By using reference data, you can complete the configuration steps faster, because you do not have to insert the rows into the tables manually.

1. At a command prompt, navigate to the following directory:
   <MDM installation directory>/app/tsr/hub/schema/reference-data
2. Use a database tool to run the following script:
   Supplier_lookup_script_oracle.sql
3. Verify that the lookup records loaded successfully from the Hub Console.
   a. In the Hub Console, in the Utilities workbench, click **Batch Group**.
   b. Expand **BG_All_Lookup_Load** and select **Control & Logs**.
   c. In the Logs for each job table, review the Status column to verify that the load was successful. The Total records column shows the number of records added. The columns to the right of the Total records column displays zeros if all records load successfully.
   d. If the load was unsuccessful, try running the load. Select **BG_All_Lookup_Load** and click **Execute**.

4. Use a database tool to run the following script:

   ```sql
   INSERT_C_REPOS_APP_CONFIG_ORACLE.sql
   ```

   The table **C_REPOS_APP_CONFIG** is populated with reference data.

---

**Integrate the MDM Hub with Informatica Address Verification Cleanse Engine**

You must integrate the MDM Hub with the Informatica Address Verification cleanse engine for S360. Use the Informatica Address Verification Adapter for the integration.

For more information about integrating the MDM Hub with the Informatica Address Verification cleanse engine, see *Informatica MDM Multidomain Edition Cleanse Adapter Guide*.

---

**Import InfaSupplierMaster into Informatica Data Director**

S360 requires Informatica Data Director (IDD) applications: InfaSupplierMaster.

InfaSupplierMaster contains the user interface for business users. You configure the URL for the MDM File Manager. Then you import, validate, and deploy this IDD application.

---

**Importing InfaSupplierMaster into Informatica Data Director**

Import the **InfaSupplierMaster.zip** file as an IDD application, and then deploy it.

1. Start Informatica Data Director Configuration Manager.

   ```plaintext
   https://<hostname>:<port>/bdd/config
   ```

2. Click **Import > Import Complete IDD Application (ZIP)**.

3. Click **Browse**, and navigate to the following directory:

   ```plaintext
   <MMD installation directory>/app/tar/hub/idd
   ```

4. Select **InfaSupplierMaster.zip**, and click **Open**.

5. Click **Import**.

6. Under **Bind Logical ORS**, select **supplier_hub**.
7. Click **Save**.
   Informatica Data Director imports and validates the IDD application. This might take some time.

8. Review the validation results. Resolve any errors.

9. With the application selected, click **Application State > Full Deployment**.
   Informatica Data Director deploys the IDD application.

**Inserting Entity 360 Component Instances**

Entity 360 pages contain components that ship with Informatica MDM. The component instance definitions ship with the Application. You insert these components into the repository table `C_REPOS_COMPONENT_INSTANCE`.

1. In a database tool that supports the BLOB data type, open the table `C_REPOS_COMPONENT_INSTANCE`.
2. Ensure that you have rows with the values pairs contained in the following table. Insert rows for any missing values.

<table>
<thead>
<tr>
<th>Instance Name</th>
<th>Type Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>AlternateSuppliers_ExternalLink</td>
<td>ExternalLink</td>
</tr>
<tr>
<td>DueForRenewal_ExternalLink</td>
<td>ExternalLink</td>
</tr>
<tr>
<td>FileManager_ExternalLink</td>
<td>ExternalLink</td>
</tr>
<tr>
<td>Supplier_GetOneHop</td>
<td>Supplier_GetOneHop</td>
</tr>
<tr>
<td>Supplier_MatchMerge</td>
<td>MatchMerge</td>
</tr>
<tr>
<td>OnboardingTime_ExternalLink</td>
<td>ExternalLink</td>
</tr>
<tr>
<td>ProductCategory_ExternalLink</td>
<td>ExternalLink</td>
</tr>
<tr>
<td>StartPage</td>
<td>StartPage</td>
</tr>
<tr>
<td>Supplier</td>
<td>ContainerCoView</td>
</tr>
<tr>
<td>Supplier_CoMgr</td>
<td>RootCo</td>
</tr>
<tr>
<td>Supplier_RootView</td>
<td>RootCo</td>
</tr>
<tr>
<td>Supplier_RootViewFinanceMgr</td>
<td>RootCo</td>
</tr>
<tr>
<td>XrefSourceSystems</td>
<td>XrefSourceSystems</td>
</tr>
<tr>
<td>Contacts_ExternalLink</td>
<td>ExternalLink</td>
</tr>
<tr>
<td>Documents_ExternalLink</td>
<td>ExternalLink</td>
</tr>
<tr>
<td>SupplierOverview_ExternalLink</td>
<td>ExternalLink</td>
</tr>
<tr>
<td>Twitter_ExternalLink</td>
<td>ExternalLink</td>
</tr>
</tbody>
</table>
3. For each row, verify that you have an XML file uploaded in the CONFIG_DATA column. If the column is empty, upload the XML file with the same name from the following directory:

<MDM installation directory>/app/tar/hub/entity360config

Assign a Message Queue for the Message Triggers

You must specify a message queue for each of the predefined message triggers of the Party and Party Relationship base objects.

1. Log in to the MDM Hub Console.
2. In the Model workbench, click Schema.
3. Acquire a write lock.
4. Expand the Party base object, and select Message Trigger Setup.
5. Select a target message queue for each of the message triggers.
7. Select a target message queue for each of the message triggers.
8. Click Save.

Setting the Configuration Properties

Set the configuration properties that the setup script requires. If you change these properties in the future, you need to rerun the setup script.

You set properties in the following files:

- appconfig.properties
- connection_properties.properties
- siperian-client.properties
- log4j.xml

Setting Properties in the connection_properties.properties File

You select connection properties for the database and the application server.

1. Navigate to the following directory:

<MDM installation directory>/app/tar/config

2. Open the connection_properties.properties file in an editor.

3. For the jdbc.dialect property, enable the property that matches your database. Comment out the other property.

   For example, the following code enables the property for Oracle 10g and disables the same property for Microsoft SQL Server:

   ```
   #jdbc.dialect=org.hibernate.dialect.SQLServerDialect
   jdbc.dialect=org.hibernate.dialect.Oracle10gDialect
   ```
4. Set the jdbc.datasource property to the supplier_hub data source.

5. Set the orsID property.
   In the Hub Console, navigate to Configuration > Databases to get the ORS ID.

6. For the application server properties, find the comment that mentions the application server you use, and enable the group of properties under the comment. Comment out the properties for other application servers.

7. Set the application server properties as instructed in the file comments.

8. Save the file.

Setting Properties in the appconfig.properties File

Set the value of the JDBC data source. Do not edit the other properties in this file or the connection might fail.

1. At a command prompt, navigate to the following directory:
   `<MDM installation directory>/app/tsr/config`

2. Open the appconfig.properties file in an editor.

3. Set the value of the jdbc.datasource property to match the value that you set in the connection_properties.properties file.

4. Save the file.

Setting Properties in the siperian-client.properties File

Set the ORS ID and the InitialContext parameters, based on the application server that you use.

1. At a command prompt, navigate to the following directory:
   `<MDM installation directory>/app/tsr/config`

2. Open the siperian-client.properties file in an editor.

3. Set the value of the siperian-client.orsId property to the ORS ID.
   In the Hub Console, navigate to Configuration > Databases for the ORS ID.

4. Search and uncomment all the properties related to the application server that you use. If required, provide the property values. Ensure that you comment all the properties related to other application servers.

5. Set the application server properties as instructed in the file comments.

6. Save the file.

Install the Application Configuration Tool

You must install the Application Configuration tool and set the S360 global configuration properties from the Application Configuration user interface. The Application Configuration tool runs within IDD.
Prerequisites

If you use a JBoss application server, you must add the JBoss remoting JAR files to the `app/tsr/lib/` folder.

Based on the JBoss version you use, download the following files from Maven repository to the `app/tsr/lib/` folder:

- jboss-ejb-client
- jboss-remote-naming
- jboss-remoting
- xnio-nio
- xnio-api

Installing the Application Configuration Tool

To install the Application Configuration tool, run the `install-tsr` script.

1. Navigate to the following directory:
   
   `<MDM installation directory>/app/tsr/config`

2. Edit the following configuration files and specify the property values:

<table>
<thead>
<tr>
<th>Configuration File</th>
<th>Property</th>
</tr>
</thead>
<tbody>
<tr>
<td>appconfig.properties</td>
<td>JDBC source</td>
</tr>
<tr>
<td>connection_properties.properties</td>
<td>JDBC datasource, ORS ID</td>
</tr>
<tr>
<td>siperian-client.properties</td>
<td>ORS ID, application server specific properties</td>
</tr>
<tr>
<td>log4j.xml</td>
<td>Location of the log file</td>
</tr>
</tbody>
</table>

3. At a command prompt, navigate to the following directory:
   
   `<MDM installation directory>/app/tsr/bin`

4. Run one of the following scripts:
   
   - On Windows: `install-tsr.bat`
   - On Linux: `./install-tsr.sh`

5. At the prompts, enter the following parameters:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDM Hub installation directory</td>
<td>Press Enter to use the default path or type the fully-qualified path to the directory where you installed Informatica MDM Hub.</td>
</tr>
<tr>
<td>MDM Supplier 360 Application installation directory</td>
<td>Press Enter to use the default path or type the fully-qualified path to the directory that contains the Application files.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Application Server</td>
<td>Type the name of the application server in lowercase.</td>
</tr>
<tr>
<td>Application to deploy</td>
<td>Type appconfig.</td>
</tr>
</tbody>
</table>

6. If the application server is WebSphere, open the WebSphere Application Server Administrative Console, and deploy the appconfiguration.war file located in the following directory:

   `<MDM installation directory>/app/tar`

### Setting the cmx.dataview.enabled Property to True

The `cmx.dataview.enabled` option specifies whether the Data workspace, Application Configuration, and related elements appear in IDD applications. When `cmx.dataview.enabled=true`, you can view the Application Configuration tab.

1. Navigate to the following directory:
   `<MDM installation directory>/hub/server/resources`
2. Use a text editor to open the `cmxserver.properties` file.
3. Set `cmx.dataview.enabled=true`.
4. Save and close the file.
5. Restart the application server.

### Enabling the HTTPS Protocol

If the MDM Hub and Informatica Product 360 are configured to use the HTTPS protocol, enable the HTTPS protocol for the Supplier 360 components.

1. Extract the `InfasSupplierMaster.zip` file located in the following directory:
   `<MDM installation directory>/app/tar/hub/idd`
2. In a text editor, open the `BDDConfig.xml` file.
3. In the XML file, search for the following entries:
   - `<externalLink name="supplier_doc_child_link" type="IFRAME" url="http://@LOCALHOST@:@LOCALPORT@/supplierapp-war/mdm/supplierapp/document">`
   - `<externalLink displayName="App Configuration" name="appconfig" type="IFRAME" url="http://@LOCALHOST@:@LOCALPORT@/appconfiguration">`
4. In the `url` parameter of the selected entries, change `http` to `https`.
5. Save the XML file.
6. Log in to the IDD Configuration Manager, and select the application.
7. Click `Import > Import to existing IDD application`.
8. In the `Import to existing IDD application` dialog box, select `BDD Configuration`.
9. Click `Browse`, and select the `BDDConfig.xml` file.
10. Click `Import`.  

32  Chapter 3: Before You Install
Configure the Supplier 360 Properties

Before you install Supplier 360, configure the Supplier 360 properties that include connection parameters, security parameters, and workflow adapter-related parameters.

Supplier 360 Properties

Use the Application Configuration UI to configure the Supplier 360 properties based on your environment.

You can configure the following Supplier 360 properties:

**Connection Types**

Configure the connection types based on your environment. When you configure different connection types, ensure that you use the HTTP port number even though your environment is configured to use the HTTPS protocol.

The following table describes the connection types and their properties:

<table>
<thead>
<tr>
<th>Connection Type</th>
<th>Description</th>
<th>Host</th>
<th>Instance</th>
<th>User Credentials</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDMHub</td>
<td>Runs the business entity service and services integration framework (SIF) requests.</td>
<td>Name of the host that runs the MDM Hub.</td>
<td>Name of the Operational Reference Store of Supplier 360.</td>
<td>User credentials to execute the business entity service and services integration framework (SIF) requests.</td>
</tr>
<tr>
<td>Bpm</td>
<td>Provides access to the ActiveVOS workflows.</td>
<td>Name of the host that runs the Informatica ActiveVOS instance.</td>
<td>Reserved for future use.</td>
<td>User credentials of the trusted user to access the Informatica ActiveVOS instance.</td>
</tr>
<tr>
<td>FileService</td>
<td>Uploads documents from the Supplier Portal and Informatica Data Director.</td>
<td>Name of the host that runs the MDM Hub.</td>
<td>Name of the Operational Reference Store of Supplier 360.</td>
<td>User credentials to upload documents.</td>
</tr>
<tr>
<td>ExternalApp</td>
<td>Provides access to an external application, such as Product 360.</td>
<td>Name of the host that runs the external application.</td>
<td>Name of the Operational Reference Store of Supplier 360.</td>
<td>User credentials to access the external application. For Product 360, use the Product 360 Supplier Portal credentials.</td>
</tr>
<tr>
<td>email</td>
<td>Provides access to the ActiveVOS email service.</td>
<td>Name of the host that runs the Informatica ActiveVOS instance.</td>
<td>Name of the ActiveVOS email service. Specify avosEmailNotification.</td>
<td>User credentials of the trusted user to access the ActiveVOS email service.</td>
</tr>
</tbody>
</table>

**System Configuration - JMS**

Lists the properties related to Java Message Service (JMS).
The following table lists the properties that you can configure for JMS:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>JMS Connection Factory</td>
<td>The Java Naming and Directory Interface (JNDI) name of the queue connection factory.</td>
</tr>
<tr>
<td>JMS Destination</td>
<td>The JNDI name of the Hub outbound queue.</td>
</tr>
</tbody>
</table>

**Portal Configuration**

Lists the properties related to Portal Configuration.

The following table lists the properties that you can configure for Portal Configuration:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Licensed to</td>
<td>Organization to which S360 is licensed.</td>
</tr>
<tr>
<td>Organization Email</td>
<td>Email of the organization.</td>
</tr>
<tr>
<td>Copyright</td>
<td>Copyright notice that is displayed on the portal.</td>
</tr>
<tr>
<td>TermsOfUse</td>
<td>Link to the terms of use content.</td>
</tr>
<tr>
<td>Server Idle Time</td>
<td>Idle time that must elapse before an active session is suspended.</td>
</tr>
<tr>
<td>Time Warning Before Logout</td>
<td>Time between a time out warning and suspension of the session due to continuous idle time.</td>
</tr>
</tbody>
</table>

**System Configuration - API**

Lists the properties for the SIF search requests.

The following table lists the properties that you can configure for System Configuration - API:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Size</td>
<td>Maximum number of records to be retrieved.</td>
</tr>
<tr>
<td>System Name</td>
<td>System name that the portal must use.</td>
</tr>
</tbody>
</table>

**System Configuration - Adapter**

Lists the properties for the external adapter, such as PIM.
The following table lists the properties that you can configure for System Configuration - Adapter:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adapter Class</td>
<td>Name of the adapter class. Change the default value if you use a custom adapter.</td>
</tr>
<tr>
<td>Custom Adapter Used</td>
<td>Indicates whether you use a custom adapter.</td>
</tr>
<tr>
<td>Custom Adapter Location</td>
<td>Location of the custom adapter jar file, if you use a custom adapter.</td>
</tr>
</tbody>
</table>

**System Configuration - Mode of Operation**

Indicates the mode of operation in which you want to run the application. You can run the application with or without Informatica Product 360 (PIM).

The following table lists the properties that you can configure to specify the environment:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable HTTPS</td>
<td>Indicates whether the application runs in a secure connection.</td>
</tr>
<tr>
<td>Standalone Mode</td>
<td>Indicates whether the application runs in a standalone mode.</td>
</tr>
<tr>
<td>With PIM</td>
<td>Indicates whether the application uses PIM.</td>
</tr>
</tbody>
</table>

**System Configuration - Workflows**

Lists the properties for System Configuration - Workflows to configure workflows:

The following table lists the properties that you can configure for System Configuration - Workflows:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portal First Task Type</td>
<td>The first task that is triggered when a supplier registers from the supplier portal side.</td>
</tr>
<tr>
<td>Approval SLA</td>
<td>SLA for supplier profile approval.</td>
</tr>
<tr>
<td>BPM Adapter</td>
<td>Type of the workflow adapter used, whether business entity or subject area.</td>
</tr>
<tr>
<td>Create Workflow</td>
<td>Name of the ActiveVOS create workflow.</td>
</tr>
</tbody>
</table>

**Twitter Configuration**

Lists the properties that you can configure for Twitter.

The following table lists the Twitter properties that you can configure:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twitter Account</td>
<td>Twitter account for the dashboard.</td>
</tr>
<tr>
<td>Twitter Widget ID</td>
<td>Twitter widget ID for the dashboard.</td>
</tr>
</tbody>
</table>
Setting Properties from the Application Configuration UI

Set the appConnection and the appProperty related properties from the Application Configuration UI.

1. Launch Informatica Data Director.
   
   `http://<host>:<port_number>/bdd/config`

2. Log in with your user credentials.

3. If prompted to select an application, select InfaSupplierMaster.

4. Click **App Configuration**.

5. On the **Connections** tab, configure the following connection types:
   
   - MDMHub
   - Bpm
   - FileService
   - ExternalApp
   - email

6. On the **Properties** tab, specify the properties.

7. Click **Save Changes**.

**Tip:** To undo a change, click **Reset**.

Configuring the Security Property

The `appConfig.xml` file contains the security property. You can edit the file to configure the Supplier Portal pages that you want to be editable. By default, all pages are editable by supplier representatives with the Admin User role when the supplier profiles is in the Registered or Approved status.

1. At a command prompt, navigate to the following directory:

   `<MDM installation directory>/app/tsr/pre-install-config`

2. Open the `appConfig.xml` file in an XML editor.

3. Edit the `<appSecurity>` property.

4. Save the file.

Configure the Supplier Portal

You configure the list of products and services that your organization is interested in purchasing. You can also create a list of questions to ask suppliers questions about products and services.

Adding Images for the Supplier Portal

You can add a logo and a background image for the Supplier Portal sign in page.

Prepare your image files:

- Get a .png version of your logo and save it as `portal_logo.png`.

---

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Create a .png version of a background image and save it as portal.png

1. Navigate to the following directory:
   `<MDM installation directory>/app/tsr/images`
2. Copy the prepared image files to the images directory.
   **Note:** The file names must match the file names in the directory.

### Configure the Products and Services Page

On the Supplier Portal, you can include a list of the products and services that your organization is interested in purchasing. When a supplier representative fills out the online supplier application form, the representative can select the products and services that the organization offers.

To populate the Products and Services page, first create the list of products and services as an XML file. Then add the content of the XML file to the page by loading the XML file into a repository table.

### Creating the List of Products and Services

You create an XML file that contains a list of products and services. The list can be hierarchical to represent categories and subcategories. You can create as many levels of nested subcategories as you require.

1. Navigate to the following directory:
   `<MDM installation directory>/app/tsr/pre-install-config`
2. Open `prod_hierarchy.xml` in an XML editor.
3. Create a hierarchy of products and services.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>tns:products</code> (top-level element)</td>
<td>Use with the default attributes as the top-level parent element. Do not edit.</td>
</tr>
<tr>
<td><code>tns:product</code></td>
<td>Use to define a product, a service, or the name of a subcategory. Ensure that the element has a <code>code</code> attribute with a unique value and a <code>description</code> attribute that contains the text to display on the Products and Services page.</td>
</tr>
<tr>
<td><code>tns:products</code> (subcategory)</td>
<td>Use without attributes to contain a list of products or services with a subcategory. Add this element as a child element of the target <code>tns:product</code> element.</td>
</tr>
</tbody>
</table>

4. Save the file.

### Sample Product Hierarchy XML File

For example, to create the following hierarchy of products:

- Clothing & Handbags
  - BOYS CLOTHING
  - Basics
  - Clothing Sets
  - Footwear
  - Outerwear
- Pants
- School Uniforms
- Shirts
- Sleepwear
- GIRLS CLOTHING
  - Basics
  - Clothing Sets
  - Footwear
  - Outerwear
  - Pants
- School Uniforms
- Shirts
- Sleepwear

You create the following XML file:

```xml
<?xml version="1.0" encoding="UTF-8"?>
<tns:products
  xmlns:tns="http://www.informatica.com/solutions/supplier/prod_hierarchy"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:schemaLocation="http://www.informatica.com/solutions/supplier/prod_hierarchy prod_hierarchy.xsd">
  <tns:product code="1Clo" description="Clothing &amp; Handbags">
    <tns:products>
      <tns:product code="2CloBOY" description="BOYS CLOTHING">
        <tns:products>
          <tns:product code="3CloBOYBas" description="Basics"></tns:product>
          <tns:product code="4CloBOYClo" description="Clothing Sets"></tns:product>
          <tns:product code="5CloBOYFoo" description="Footwear"></tns:product>
          <tns:product code="6CloBOYOut" description="Outerwear"></tns:product>
          <tns:product code="7CloBOYPan" description="Pants"></tns:product>
          <tns:product code="8CloBOYSch" description="School Uniforms"></tns:product>
          <tns:product code="9CloBOYShi" description="Shirts"></tns:product>
          <tns:product code="10CloBOYSle" description="Sleepwear"></tns:product>
        </tns:products>
      </tns:products>
    </tns:products>
  </tns:product>
  <tns:product code="11CloGIR" description="GIRLS CLOTHING">
    <tns:products>
      <tns:product code="12CloGIRBas" description="Basics"></tns:product>
      <tns:product code="13CloGIRClo" description="Clothing Sets"></tns:product>
      <tns:product code="14CloGIRFoo" description="Footwear"></tns:product>
      <tns:product code="15CloGIROut" description="Outerwear"></tns:product>
      <tns:product code="16CloGIRPan" description="Pants"></tns:product>
      <tns:product code="17CloGIRSch" description="School Uniforms"></tns:product>
      <tns:product code="18CloGIRShi" description="Shirts"></tns:product>
      <tns:product code="19CloGIRSle" description="Sleepwear"></tns:product>
    </tns:products>
  </tns:product>
</tns:products>
```
Uploading the List of Products and Services

After you create the list of products and services, you upload the XML file to a repository table. Then you populate a lookup table with the same values. You need to restart the application server to see the changes in the Supplier Portal.

1. In a database tool that supports the BLOB data type, open the table C_REPOS_APP_CONFIG.
2. Do one of the following:
   - If a row exists with the value PRODUCT_HIERARCHY in the CONFIG_TYPE column, use this row.
   - If not, insert a row and enter PRODUCT_HIERARCHY in the CONFIG_TYPE column.
3. In the CONFIG_DATA column, load the prod_hierarchy.xml file.
4. Open the lookup table C_BT_PRDCTS_SRVCS.
   a. Insert a row.
   b. In the PRDCT_SRVC_CD column, enter the value of a code attribute for a <tns:product> element in the XML file.
   c. In the PRDCT_SRVC_DESC column, enter the value of the description attribute for the same <tns:product> element.
   d. Repeat the substeps to create rows for all the products and services defined in the XML file.
5. Restart the application server.

Sample Product Hierarchy on the Product and Services Page

The following image shows how the sample product hierarchy appears on the Product and Services Page after you restart the application server and refresh the browser instance:
Configure the Product Related Questions Page

On the Supplier Portal, you can include a list of questions about products and services. When a supplier representative fills out the online supplier application form, the representative can answer the questions.

To populate the Product Related Questions page, you add questions as records in a base object table. Then you populate a relationship base object with mappings between the questions and the products or services to which they apply. You can map the same question to more than one product or service.

Creating Questions about Products and Services

You add questions to the Product Related Questions base object by inserting records into the C_BO_PRDCT_RLTD_QSTNS table. You use the Data Manager in the Hub Console to insert records.

1. In the Hub Console, acquire a write lock.
2. In the Data Steward workbench, click Data Manager.
3. In the screen, set the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Object</td>
<td>Select Product Related Questions.</td>
</tr>
<tr>
<td>Put package</td>
<td>Select Package Product Related Questions.</td>
</tr>
<tr>
<td>Display package</td>
<td>Select Use put Package.</td>
</tr>
<tr>
<td>Query</td>
<td>Do not set.</td>
</tr>
<tr>
<td>Page size</td>
<td>Do not set.</td>
</tr>
</tbody>
</table>

4. Click Begin Administration.
5. Click Finish to close the wizard without setting options.
   The wizard closes and the Data Manager screen appears.
6. Add questions one at a time. Click the Add icon.
7. In the Record Editor dialog box, set the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hub State Indicator</td>
<td>Select 1 - Active.</td>
</tr>
<tr>
<td>Question</td>
<td>Type the question.</td>
</tr>
<tr>
<td>Active Indicator</td>
<td>Select Yes.</td>
</tr>
</tbody>
</table>

8. Click OK.
9. Add remaining questions.

Creating Relationships Between Questions and Products or Services

After you create both the list of products or services and the list of questions, you can create relationships between the products or services and the questions. You create the relationships in the Products and
Services Questions Relationship base object by inserting records into the C_BO_PRDCT_SRVC_QSTN_REL table.

**Note:** You can map the same question to more than one product or service by creating a record for each mapping.

1. In the Hub Console, acquire a write lock.
2. In the Data Steward workbench, click **Data Manager**.
3. In the screen, set the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Object</td>
<td>Select <strong>Product And Services Questions Relationship</strong>.</td>
</tr>
<tr>
<td>Put package</td>
<td>Select <strong>Package Product Relates Ques Product Rel</strong>.</td>
</tr>
<tr>
<td>Display package</td>
<td>Select <strong>Use put Package</strong>.</td>
</tr>
<tr>
<td>Query</td>
<td>Do not set</td>
</tr>
<tr>
<td>Page size</td>
<td>Do not set</td>
</tr>
</tbody>
</table>

4. Click **Begin Administration**.
5. Click **Finish** to close the wizard without setting options. The wizard closes and the Data Manager screen appears.
6. Add mappings one at a time. Click the **Add** icon.
7. In the **Record Editor** dialog box, set the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hub State Indicator</td>
<td>Select <strong>1 - Active</strong>.</td>
</tr>
<tr>
<td>Product Related Questions Id</td>
<td>Select the question.</td>
</tr>
<tr>
<td>Product and Service Code</td>
<td>Select the product or service to link with the question.</td>
</tr>
<tr>
<td>Mandatory Indicator</td>
<td>If suppliers must answer the question, select <strong>Y</strong>. Otherwise, select <strong>N</strong>.</td>
</tr>
</tbody>
</table>

8. Click **OK**.
9. Add remaining mappings.
10. Restart the application server.

---

**Configure Email Templates**

Some business processes and services send requests to the email service. The email service generates and sends personalized emails to supplier representatives.

To configure email templates, perform the following tasks:

- Edit the email template definitions to add buyer-side email addresses.
Configure the Email Templates

The email service creates personalized email messages based on email templates. A service request that invokes the email service includes the name of the email template and the values for email template attributes and for body text parameters.

The following table describes the email templates:

<table>
<thead>
<tr>
<th>Email Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OnInvitationSupplier_en</td>
<td>Invites a representative from a qualified supplier to register on the Supplier Portal. Used by the buyer after implementing S360.</td>
</tr>
<tr>
<td>inviteNewSupplier</td>
<td>Invites a representative from a new supplier to go to the Supplier Portal, register, and fill out an application.</td>
</tr>
<tr>
<td>OnboardingRegistrationSupplier_en</td>
<td>Notifies the supplier representative that the Supplier Portal registration was successful and describes the next steps.</td>
</tr>
<tr>
<td>AfterRegistrationSupplier_en</td>
<td>Notifies the supplier representative that the submitted application was received and is under review.</td>
</tr>
<tr>
<td>AfterAcceptSupplier_en</td>
<td>Welcomes the supplier as an approved supplier.</td>
</tr>
<tr>
<td>AfterRejectSupplier_en</td>
<td>Notifies the supplier representative that their application was declined.</td>
</tr>
<tr>
<td>newSupplierUserEmail_en</td>
<td>Welcomes a supplier contact as a user of the Supplier Portal. The supplier representative can add multiple contacts on the Contacts page, and each person receives this email.</td>
</tr>
<tr>
<td>LostPassword_en</td>
<td>Notifies a user that someone has requested a password reset for the user account.</td>
</tr>
<tr>
<td>error_message</td>
<td>Notifies an administrator on the buyer-side when there is an error in the ActiveVOS workflow.</td>
</tr>
</tbody>
</table>

Email Template Attributes

The emailConfig.xml file contains the definitions of the predefined email templates.

In the XML file, the parent <emailConfigs> element contains multiple <emailConfig> elements, one for each email template. When a service requests an email, it must specify one of these email templates.

The following table describes the attributes that are defined within the <emailConfig> element:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>emailTemplate</td>
<td>template name</td>
<td>Specifies the name of the email template. The workflow or service that sends the request to the email service specifies which email template to use.</td>
</tr>
</tbody>
</table>
Navigate to the following directory:

Open

Save the file.

Search for the

Search for the

Example Email Template

The following XML sample contains the definition of an email template. When using this template, the email service creates a personalized email that uses the subject line "Supplier Portal - Next Steps" and the body text contained in the RegistrationSuccessful_en.xsl file. The personalized email is sent to the supplier representative.

```
<email-config>
  <email-config emailTemplate ="registrationSuccessful">
    <replyTo>supplierrelationships@informatica.com</replyTo>
    <sendFrom>supplierrelationships@informatica.com</sendFrom>
    <subject>Supplier Portal - Next Steps</subject>
    <template>RegistrationSuccessful_en</template>
    <type>text/html</type>
  </email-config>
...
</email-config>
```

Editing the Email Templates

You configure the email templates to add a valid email address that can be used when the service request does not contain an email address. You might also want to add your organization name to the subject line.

1. Navigate to the following directory:
   <MDM installation directory>/app/tsr/email-config
2. Open emailConfig.xml in an editor.
3. Search for the <sendFrom> attribute and insert an email address. Repeat for each template.
4. Search for the <replyTo> attribute and insert an email address. Repeat for each template.
5. If you want, search for the <subject> attribute and add your organization name before "Supplier Portal." Repeat for each template.
6. Save the file.
Configure the Body Text in Email Templates

The email templates contain references to .xsl files. The .xsl files contain the body text that is used by the templates. You need to configure the .xsl files.

Different types of text appear in the files:

- Placeholder text, which is enclosed in square brackets, such as [organization name]
- Plain text for the message
- Parameters for personalization which start with `<xsl:value-of select="...">

You need to replace placeholder text with your organization name and contact information. You can also edit the plain text and add or remove parameters.

Parameters Used in Email Body Text

When the email service generates a personalized email, it replaces parameters with values that it receives in the service request. For example, a welcome email can include user credentials for the Supplier Portal. Avoid editing these parameters.

The following table describes the parameters that you can use in body text:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>&lt;a target=&quot;_blank&quot; href=&quot;${loginPage}&quot;&gt;</code></td>
<td>Link to the sign in page of the Supplier Portal</td>
</tr>
<tr>
<td><code>&lt;xsl:value-of select=&quot;tns:sendEmail/properties/property[@name='firstName']/&quot;&gt;</code></td>
<td>First name of a supplier representative</td>
</tr>
<tr>
<td><code>&lt;xsl:value-of select=&quot;tns:sendEmail/properties/property[@name='lastName']/&quot;&gt;</code></td>
<td>Last name of a supplier representative</td>
</tr>
<tr>
<td><code>&lt;xsl:value-of select=&quot;tns:sendEmail/properties/property[@name='loginName']/&quot;&gt;</code></td>
<td>User name of a supplier representative, which is the representative's email address</td>
</tr>
<tr>
<td><code>&lt;xsl:value-of select=&quot;tns:sendEmail/properties/property[@name='errorDesc']/&quot;&gt;</code></td>
<td>Error message</td>
</tr>
</tbody>
</table>

Editing the Body Text

In each XSL file, you need to edit the placeholder text to reflect details about your organization, such as the name and the contact information.

1. Navigate to:
   `<MDM installation directory>/app/tsr/email-config/templates/avos-templates`
2. Open an XSL file in an editor.
3. Search for an opening square bracket (I). Replace the square brackets and the enclosed text with the requested information.
4. Repeat the previous step until you replace all placeholder text.
5. Save the file.
6. Repeat for all other XSL files in this directory.
Configure Product Information Management

If the S360 environment includes Informatica Product 360, you must perform some pre-installation tasks for Informatica Product 360. Later, after you install the application, you finish the integration by configuring MDM Hub to manage user authentication between the S360 Supplier Portal and the Informatica Product 360 Portal.

**Note:** If you want to use a third-party PIM product, contact your Informatica representative.

Perform the following pre-installation tasks:

- Edit email templates for Informatica Product 360.
- Set the configuration properties in Product 360.
- Create users in the Product 360 Server.
- Edit the `webfrontend.properties` file.

### Edit Email Templates for Informatica Product 360

The Application ships with modified email templates for Informatica Product 360. In each HTML file, edit the placeholder text to reflect details about your organization, such as the name and the contact information. Avoid editing parameters, which start with the `$` character. When you are finished, copy the templates to the Informatica Product 360 `mailTemplates` directory.

**Note:** The file names of the edited templates must match the file names of the original Informatica Product 360 email templates.

1. Navigate to the following directory:
   ```
   <MDM installation directory>/app/tsr/email-config/templates/pim-templates
   ```
2. Open an HTML file in an editor.
3. Search for an opening square bracket (`). Replace the square brackets and the enclosed text with the requested information.
4. Repeat the previous step until you replace all placeholder text.
5. Save the file.
6. Repeat for all other HTML files in this directory.
7. Copy the HTML files to the following directory:
   ```
   <PIM installation directory>/configuration/mailTemplates
   ```
8. If prompted to overwrite files, select Yes.

### Set Configuration Properties in Informatica Product 360 Supplier Portal

In the Informatica Product 360 (PIM) configuration properties file, set user permissions and set the timeline and notification properties to their default values.

1. At a command prompt, navigate to the following directory:
   ```
   <PIM Supplier Portal directory>/configuration/
   ```
2. Open the `configuration.properties` file in a editor.
3. Set the permissions for the default user roles to the specified values:
   
   ```
   permissions.portalAdmin=VIEW_IMPORT_MANAGER, MANAGE_SUPPLIER_USER
   permissions.supplierAdmin=START_DRY_RUN
   ```

   **Note:** If these roles have additional permissions, remove the other permissions.

4. If you want the Supplier Administrator role to edit a catalog in the Supplier Portal, add the following entry to the file:
   
   ```
   global.permission.itemeditor=EDIT
   ```

5. Verify that the timeline and notification settings are set to default values:
   
   ```
   # Default values for email notifications of new feed messages
   # Supplier user
   feednotification.supplier.USER_REQUEST=true
   feednotification.supplier.USER_REGISTRATION=false
   feednotification.supplier.TEST_RUN_COMPLETE=true
   feednotification.supplier.IMPORT_RUN_COMPLETE=true
   # Portal user
   feednotification.portal.USER_REQUEST=true
   feednotification.portal.USER_REGISTRATION=true
   feednotification.portal.TEST_RUN_COMPLETE=false
   feednotification.portal.IMPORT_RUN_COMPLETE=true
   feedfilter.type
   ```

6. Save the file.

### Create Users in the PIM Server

To provide access to the PIM Web Item Editor functionality from the Portal, you need to configure special PIM system users on the PIM server. You need to create a PIM Supplier Portal administrator user for actions triggered by a portal administrator. You also need to create two PIM Supplier Portal system users for actions triggered by suppliers.

The S360 administrator is a PIM Supplier Portal administrator user. This user must belong to a group that has all action rights. This user can call PIM APIs for the S360 application.

Suppliers are PIM Supplier Portal system users. These users either have edit access or read-only access to the Supplier Portal. All supplier calls from the Portal to edit product catalogs use the credentials of the PIM system user with edit access. Similarly, all supplier calls with read-only permissions use the credentials of the PIM system user with read-only access.

### Creating an Administrative User in Informatica Product 360 (PIM)

You need to create an administrative user that can call the PIM APIs for S360. You create the user in the PIM Desktop and assign the user to a user group with all action rights.

1. Launch PIM Desktop.

2. To create a user, perform the following steps:
   a. Open the User perspective.
   b. Click **Management > User**.
   c. In the User view, click the **Add** icon.

   The Add action creates a row in the table.
d. Specify the following properties:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User name</td>
<td>Name of the user. For example, TSRAdministrator.</td>
</tr>
<tr>
<td>Password</td>
<td>Password for the user. The password must have at least six characters.</td>
</tr>
<tr>
<td>Active</td>
<td>Select this option.</td>
</tr>
<tr>
<td>Name</td>
<td>Enter TSR Administrator.</td>
</tr>
<tr>
<td>Authentication Mode</td>
<td>Select Internal to indicate the user is an internal user.</td>
</tr>
</tbody>
</table>

e. Click the Save icon.

3. To create a user group, perform the following steps:
   a. Open the User Group perspective.
   b. Click Management > User Group.
   c. In the User Group view, click the Add icon.
      The Add action creates a row in the table.
   d. Enter a name for the user group.
   e. Select Active.
   f. Click the Save icon.

4. To map the user to the user group with all the action rights, perform the following steps:
   a. Right-click the user that you created, and then click Object properties.
   b. Click the Add icon.
   c. Select the user group that you created, and then click OK.
   d. Select all the check boxes, and then click OK.
   e. Click Management > Organization.
      The Action Rights properties appear in the right pane and the list of user groups appears in the left pane.
   f. Select the group that you created, and then select all the actions in the right-hand pane.
   g. Click the Save icon.

Configuring Supplier Portal Groups and Users on the PIM Server

Suppliers can use the PIM Web Item Editor functionality as a Supplier Portal editor to upload, view, and edit their product catalogs. To use the PIM Web Item Editor, configure two PIM system users, one for suppliers with edit access and the other for suppliers with read-only access.

You have to create two PIM system users, one user with edit access and the other user with read-only access. The PIM server uses these users as default system users for Item Editor access through the Supplier Portal. The webfrontend.properties file of the PIM server must reference both users. This file must contain the user names and credentials of the two users.

1. In the PIM Desktop, create a PIM system user group with edit access permissions.
2. Add a user and assign the user to the user group with the edit access permissions.
3. Create a PIM system user group with read-only access permissions.
4. Add a user and assign the user to the user group with the read-only access permissions.
5. Log out of the PIM Desktop.
6. To finish configuring these users, edit the webfrontend.properties file.

**Edit the webfrontend.properties File**

Add the login name and password of the users that you created and then specify the Web client theme that is used with the application.

1. Navigate to the following directory:
   
   <PIM installation directory>/server/configuration/HPM/

2. Open the webfrontend.properties file in an editor.

3. To add the supplier users, set the following properties:

<table>
<thead>
<tr>
<th>Property Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>web.client.hsx.supplier.login</td>
<td>Login name of the supplier user with edit permission.</td>
</tr>
<tr>
<td>web.client.hsx.supplier.password</td>
<td>Login password of the supplier user with edit permission.</td>
</tr>
<tr>
<td>web.client.hsx.readonly.supplier.login</td>
<td>Login name of the supplier user with read-only permission.</td>
</tr>
<tr>
<td>web.client.hsx.readonly.supplier.password</td>
<td>Login password of the supplier user with read-only permission.</td>
</tr>
</tbody>
</table>

4. To set the client theme, set the following property to the specified value:
   
   web.client.theme=symphony

5. Save the file.

**Sample Configuration for Users**

The following example shows the configuration of users in the webfrontend.properties file for access to the PIM Web Item Editor from the Supplier Portal:

```
# Informatica PIM - Supplier Portal Integration
#
# Login name of HPM user that is used for supplier editor
web.client.hsx.supplier.login=hsx
# Login password of HPM user that is used for supplier editor
web.client.hsx.supplier.password=!!hsx!!
# Login name of HPM user that is used for supplier view
# This user has only read-only permissions
web.client.hsx.readonly.supplier.login=hsx
# Login password of HPM user that is used for supplier view
# This user has only read-only permissions
web.client.hsx.readonly.supplier.password=!!hsx!!
```
Chapter 4

Install the Application

This chapter includes the following topics:

- Install the Application Overview, 49
- Installing the Supplier 360 Application, 49

Install the Application Overview

After you finish the pre-installation tasks, you run the setup script.

When you run the setup script, the script gets the following resources:

- Properties from the configuration files
- Properties for database connections from the property files that were created when Informatica MDM was installed
- Customized image files
- Customized email template files
- ActiveVOS business processes and the email service in .bpr files

The script updates the Application files:

- Updates the S360 application .ear file with the resources.
- Updates the ActiveVOS URN mapping parameters to the values required by S360.
- Deploys the .bpr files to the ActiveVOS Server.

Installing the Supplier 360 Application

To install S360, run the install-tsr script.

1. At a command prompt, navigate to the following directory:
   <MDM installation directory>/app/tsr/bin
2. Run one of the following scripts:
   - On Windows, install-tsr.bat
   - On Linux, ./install-tsr.sh
3. At the prompts, enter the following parameters:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDM Hub installation directory</td>
<td>Press Enter to use the default path or type the fully-qualified path to the directory where you installed Informatica MDM Hub.</td>
</tr>
<tr>
<td>MDM Supplier 360 Application installation directory</td>
<td>Press Enter to use the default path or type the fully-qualified path to the directory that contains the application files.</td>
</tr>
<tr>
<td>Application Server</td>
<td>Type the name of the application server in lowercase.</td>
</tr>
<tr>
<td>Application to deploy</td>
<td>Type tsr.</td>
</tr>
<tr>
<td>avos console username</td>
<td>Type the ActiveVOS Console username.</td>
</tr>
<tr>
<td>avos console password</td>
<td>Type the ActiveVOS Console password.</td>
</tr>
</tbody>
</table>

The script updates the `supplier-ear.ear` file.
This chapter includes the following topics:

- Configure the MDM Hub, 51
- Configure the Operational Reference Store, 57
- Populate Supplier 360 Charts with Data, 58
- Configure the ActiveVOS Email Service, 62
- Test the Supplier Portal, 63
- Test Supplier 360, 63

**Configure the MDM Hub**

Perform the following post-installation tasks:

- Add user accounts and assign roles
- Configure the MDM Hub for Informatica Product 360 (PIM)

**Add User Accounts and Assign Roles for Business Users**

User roles for business managers control the data privileges in the MDM Hub and review privileges in business processes. Each data steward and business user who is authorized to participate in supplier relationship management receives one or more role assignments. Many people can have the same role.

To add user accounts and assign roles, perform the following tasks:

1. If the business users who need to use the Supplier 360 do not have MDM user accounts, add a user account for each business user.
2. Assign roles to users.
3. If you added new users, add the new users to the application server.

For more information about users and roles, see the *Informatica MDM Multidomain Edition Security Guide*.

**Role Privileges**

You can assign any of the predefined or custom user roles to a user account.
The following table lists the predefined user roles that you can use and summarizes the role privileges:

<table>
<thead>
<tr>
<th>Role</th>
<th>Add or edit a supplier profile</th>
<th>Review supplier applications or profile updates</th>
<th>Approve supplier applications or profile updates</th>
</tr>
</thead>
<tbody>
<tr>
<td>ApplicationAdministrator</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>DataSteward</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>DataEntryOperator</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>CommodityManager</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>FinanceManager</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>ContractsManager</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>ComplianceManager</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

If you create a custom user role to provide restricted administrator access to the resources, ensure that you assign the user role with the minimum required resource privileges.

The following table lists the minimum resource privileges required for an administrator user role:

<table>
<thead>
<tr>
<th>Resources</th>
<th>Read</th>
<th>Create</th>
<th>Update</th>
<th>Delete</th>
<th>Merge</th>
<th>Execute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lookup Alternate Id Type</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Lookup Business Title</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Lookup Country</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Lookup Electronic Address Type</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Lookup Party Status Type</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Lookup Party Status Value</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Lookup Phone Type</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Lookup Portal User Role</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Lookup Postal Address Type</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Lookup State</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Party</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Party Alternate Identifier</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Party Electronic Address</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Party Phone Communication</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Resources</td>
<td>Read</td>
<td>Create</td>
<td>Update</td>
<td>Delete</td>
<td>Merge</td>
<td>Execute</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>------</td>
<td>--------</td>
<td>--------</td>
<td>--------</td>
<td>-------</td>
<td>---------</td>
</tr>
<tr>
<td>Party Postal Address</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Party Relationship</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Party Status</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Postal Address</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>AddressStandardization5</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Hierarchy Manager Profile - Default</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Supplier Hierarchy</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>DNB Domestic Ultimate Parent</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>DNB Global Ultimate Parent</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>DNB Immediate Parent</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Employs</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Organization Address</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Additional Info Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Package General Info Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Party Edit</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Party Postal Address Edit</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Party Relationship Edit</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Postal Address Edit</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Product Related Ques Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Product Related Ques Info Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Sub Suppliers Info Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Supplier Bank Info Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Supplier Certificates Info Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Supplier Contacts Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Supplier Insurance Info Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Supplier Product Services Info Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Package Supplier References Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Resources</td>
<td>Read</td>
<td>Create</td>
<td>Update</td>
<td>Delete</td>
<td>Merge</td>
<td>Execute</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>------</td>
<td>--------</td>
<td>--------</td>
<td>--------</td>
<td>-------</td>
<td>---------</td>
</tr>
<tr>
<td>Package Supplier Tax Info Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Package User Auth Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Supplier Documents Info Custom</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Other Resources - USER</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

**Note:** If you do not see the **Package Supplier Product Services Info Custom** resource in the list of resources, use the Security Access Manager workbench of the Hub Console to change the resource status to secure.

**Creating User Accounts**

If some business users do not have MDM Hub user accounts, create the user accounts.

Before you begin, you might want to review an existing MDM Hub user account to see which authentication type is in use in the Informatica MDM environment.

1. In the Hub Console, in the Configuration workbench, click **Users**.
2. Acquire a write lock.
3. Click the **Users** tab.
4. Click **Add user**.
   - The Users tool displays the **Add User** dialog box.
5. Enter a first, middle, and last name for the user.
6. Enter the user name for the user. This is the name entered when the user logs in to the Hub Console.
7. Enter the default database for the user, which is the Operational Reference Store that contains the supplier master data.
8. Enter and verify a password for the user.
9. Choose the type of authentication.
   - Select the **Use external authentication** check box if your MDM Hub implementation uses authentication through a third-party security provider.
   - Clear the **Use external authentication** check box if you want to use the internal authentication in the MDM Hub.
10. Click **OK**.
    - The Users tool adds the user to the list of users on the **Users** tab.

**Assigning Roles to Business Users**

You need to assign the user roles to the business users who are responsible for reviewing applications and edited supplier profiles.

You use the Hub Console to assign user roles. You can follow either a role-first approach or a user-first approach. For a role-first approach, you select a role and then select the users and user groups that you want to associate with the role. For a user-first approach, you select a user or user group and then select roles.
When you connect to the Operational Reference Store (ORS), select supplier_hub.

1. In the Hub Console, connect to the Operational Reference Store that supports the IDD application.
2. Acquire a write lock.
3. Expand the Security Access Manager workbench and click Users and Groups.
   The Users and Groups tool opens. You can use a role-first approach, a user-first approach, or a mix to attach roles to users.
4. If you want to follow a role-first approach, click the Assign Users/Groups to Role tab.
   a. Select a workflow role.
   b. Click the Edit button.
   c. In the Assign Users to Role dialog box, select the users and user groups who should have this role.
   d. Click OK.
   e. Repeat for each workflow role.
5. If you want to follow a user-first approach, click the Assign Roles to User/Group tab.
   a. Select a user or user group.
   b. Click the Edit button.
   c. In the Assign Roles to User dialog box, select the workflow roles suitable for the user or user group.
   d. Click OK.
   e. Repeat for each user or user group who requires workflow roles.

Adding MDM-ActiveVOS Users to the Application Server

When you install and configure Informatica MDM Multidomain Edition with the embedded ActiveVOS Server, you must set up container-based authentication in the application server and add a user.

Follow these steps to use the ActiveVOS workflow engine with the MDM Hub:

1. In the application server console, create a trusted user and assign the following roles to the user: abAdmin,abServiceConsumer,abTaskClient,abTrust.
2. To configure ActiveVOS to use MDM Identity Services, follow these steps:
   a. In the ActiveVOS console, select Admin > Configure Services > Identity Services.
   b. In the Provider Configuration section, enable the Enable check box and select MDM from the Provider Type list.
   c. On the Connection tab, enter the ActiveVOS workflow engine user password as the MDM connection settings password.
      The ActiveVOS workflow engine user is the user that you specified when you added the ActiveVOS workflow engine to the Workflow Manager tool in the MDM Hub Console.
   d. Click Update.
   e. Test the connection.
      a. Select the Test tab.
      b. In the User for test field, enter an ActiveVOS user name.
      c. Click Test Settings.
Configure the Hub for Informatica Product 360

When the environment includes Informatica Product 360, the MDM Hub manages user authentication among all the application components.

When a supplier uploads product catalogs from the S360 Supplier Portal to the Informatica Product 360 Supplier Portal, the MDM Hub handles user authentication between the Portals. A custom user profile provider maps the Supplier Portal user roles to the MDM Hub roles. A login provider authenticates Supplier Portal users with Informatica Product 360. The two providers are packaged in a bundle called PIMLoginProvider.jar.

Perform the following tasks:

- Map Portal roles to MDM Hub roles.
- Upload a security provider for Informatica Product 360.

Mapping Informatica Product 360 Supplier Portal Roles to MDM Hub Roles

Map the roles using the RoleMappingSource.xml and appconfig.properties files.

The RoleMappingSource.xml contains the mapping of external roles to internal roles in the Security Access Manager. The appconfig.properties contains the URL to the Informatica Product 360 Supplier Portal. You need to copy these files and edit the properties file.

1. In a file explorer, navigate to the following directory:
   
   `<MDM installation directory>/app/tsr/userprofile-provider`

2. Copy the files appconfig.properties and RoleMappingSource.xml.

3. Navigate to the following directory:
   
   `<MDM installation directory>/hub/server/resources`

4. Paste the copied files into the directory.

5. Open the copied file appconfig.properties in an editor.

6. Set the pim.url property to the host name and the port number of the Informatica Product 360 Supplier Portal.
   
   You can use the following format for the URL:
   
   `pim.url=http|https://<Host>:<Port>`

   The following sample URL uses the HTTPS protocol and 9090 as the port number:
   
   `pim.url=https://localhost:9090`

7. Save the file.

8. If you imported the metadata from a change list, open the copied file RoleMappingSource.xml in an editor.

9. Change the value of the `<InternalRoleRowID>` property to match the rowid of the Supplier Administrators role in the C_REPOS_SAM_ROLE table.

10. Save the file.

Uploading the Security Provider for Informatica Product 360

The security provider for Informatica Product 360 provides security services, such as authentication and authorization, for users that access the MDM Hub. You upload the provider file from the Hub Console.

1. In the Hub Console, open the Configuration workbench and select Security Providers.

2. Acquire a write lock.
4. Navigate to the following directory:
   `<MDM installation directory>/app/tsr/userprofile-provider`
5. Select the PIMLoginProvider.jar file.
6. Click Open.

   The Security Provider tool populates the Providers list with the additional provider information. After you upload the provider file, you can remove the original file from the file system.
7. Exit the Hub Console.
8. Stop the application server.
9. Restart the application server.

Configure the Operational Reference Store

Before you start the Application, configure the Operational Reference Store that contains supplier data. You must disable a trigger, truncate the data in a repository table, and review the value of the GETLIST Limit property.

Truncating a Repository Table

If you imported the Oracle database dump, the repository table C_REPOS_RPTDETAILS contains sample data. You must truncate the data.

1. In a database tool, connect to the Operational Reference Store for supplier data.
2. Run the following command:
   `truncate table C_REPOS_RPTDETAILS`

Setting the Value of the GETLIST Limit Property

The GETLIST Limit property controls how many records a SIF search request returns. The default is 200. Set this value to 500 from the Appconfiguration user interface.

   **Note:** If business users report missing addresses, try increasing the value of this property even more. The maximum value is 1000.
1. Launch Informatica Data Director.
   `http://<host>:<port number>/bdd`
2. Log in with your user credentials.
3. If prompted to select an application, select InfaSupplierMaster.
4. Click App Configuration.
5. On the Properties tab, type the value 500 in the text box next to Page Size.
6. Click Save Changes.
Populate Supplier 360 Charts with Data

Supplier 360 contains a Start workspace and Entity 360 views. These pages contain charts with metrics or data about suppliers. The data for all charts come from a data mart.

The following diagram shows how the data mart works.

The data mart service retrieves data from the Operational Reference Store and stores the results in a repository table. When the Start workspace or an Entity 360 view loads, the page queries the data mart service for the data and populates the charts.

Note: In the data mart service and configuration files, the term report refers to the chart configuration.

To populate the charts, perform the following tasks:
1. Import the chart configurations into a repository table.
2. Configure a database connection between the data mart and the database that contains the Operational Reference Store.
3. Configure the report parameters to include the database name.
4. Populate the data mart with report data.

Chart Configurations for Supplier 360

Informatica MDM ships with predefined chart configurations for the data mart service. S360 adds chart configurations for supplier data that can be used to populate the charts in the Start page or in the Entity 360 views.

The following reports contain the chart configurations:
- supplier_by_region
- address_by_validation
- contract_by_expiry_date
- document_by_expiry_date
- supplier_onboarding
- task_by_status
- task_by_priority
- supplier_segmentation

Importing the Chart Configurations

To import the chart configurations, run an insert script on the supplier_hub Operational Reference Store (ORS). The script imports the chart configurations into the repository table C_REPOS_RPT_CONFIG.

1. Open a command prompt.
2. Navigate to the following directory:

<MDM installation directory>/app/tsr/damart/chart-config

3. Use a database tool to run the `insert_c_repos_rpt_config.sql` script on the `supplier_hub`.

For example, for `sqlplus`, log in with the ORS user name and password and the service name. Then start the script.

```sql
.../chart-config> sqlplus supplier_hub/password8service
SQL> @insert_c_repos_rpt_config.sql
```

The script inserts the charts into the repository table `C_REPOS_RPT_CONFIG`.

---

**Configuring the Data Mart Database Connection**

Before you can generate reports or populate charts, you must configure the data mart database connection.

1. Go to the following directory:

<MDM installation directory>/app/tsr/damart/lib

2. If the directory does not contain the following files, copy them from the `<MDM installation directory>/hub/server/lib` directory:

   - `log4j-1.2.16.jar`
   - `ojdbc7.jar`
   - `sip4j-all.jar`
   - `commons-validator-1.4.0.jar`

3. At a command prompt, navigate to the following directory:

<MDM installation directory>/app/tsr/damart

4. Run the following command:

   ```bash
   java -jar populate_damart.jar config
   ```

5. At the prompt, type C to configure the database connection.

6. Answer the prompts described in the following table:

<table>
<thead>
<tr>
<th>Prompt</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection Name</td>
<td>Enter a unique name for the connection. If the name exists, it will be overwritten.</td>
</tr>
<tr>
<td>Type of Connection</td>
<td>Enter the type of connection to the data mart. Currently only DB is supported.</td>
</tr>
</tbody>
</table>
When prompted to finish the configuration, enter Y.

The tool saves the connection information to the config/mart-population-config.xml file.

### Configuring Parameters

Before you can populate the data mart, you must configure the report parameters for the chart configuration.

You need information contained in other sources.

**To find the report names, open the config/report-class-mapping.properties file.**

To find the configuration IDs, open the C_REPOS_RPT_CONFIG table in a database tool.

1. Open a command prompt.
2. Navigate to the data mart directory.
   
   ```
   <MDM installation directory>/app/tsr/datamart
   ```
3. Run the following command:
   
   ```
   java -jar populate_datamart.jar config
   ```
4. Type P to configure the report parameters.
5. Answer the prompts described in the following table:

<table>
<thead>
<tr>
<th>Prompt</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Name</td>
<td>Specify a report name that appears the report-class-mapping.properties file.</td>
</tr>
<tr>
<td>Report Configuration ID</td>
<td>Enter the report configuration ID for the report as it appears in the C_REPOS_RPT_CONFIG table.</td>
</tr>
</tbody>
</table>
Mart Connection Name | Enter the connection name for connecting the data mart to an Operational Reference Store. Use the connection name that you defined for the Operational Reference Store that contains the supplier data.

Query Connection Name | Enter the connection name for the database to be queried.
- For reports that include the word Tasks, specify the connection name that you defined for the ActiveVOS database.
- For all other reports, specify the connection name that you defined for the Operational Reference Store that contains the supplier data.

6. When prompted to finish the configuration, enter N. Add the next table in the list.
7. After you enter all tables, exit the configuration tool.

The tool saves the parameters to the config/mart-population-config.xml file.

Populating the Data Mart with Data

You run a java command to populate the data mart with data for all charts or for a specific chart. If you want to specify a chart, you need to use its report name.

1. Open a command prompt.
2. Run a java command to populate the data mart.
   - To populate the data mart with data for all available reports, run the following command:
     `java -jar populate_datamart.jar`
   - To populate the data mart with data for a specific report, run the following command:
     `java -jar populate_datamart.jar exec <report name>`

If the supplier_hub contains data, the C_REPOS_RPT_DETAILS repository table is populated with report data. The ROWID_RPT_CONFIG column links the data to the report configuration that requested the data.

---

Populate Supplier 360 Charts with Data
Configure the ActiveVOS Email Service

The Application uses the email service available with the ActiveVOS Server. You need to enable the service and specify a mail server.

You configure the email service from the ActiveVOS Console. You can do this step now, while you are configuring the email templates, or you can configure the email service after you install the Application.

Mail Server Properties

When you enable the email service, you need to specify a mail server.

The following table describes the mail server properties that you need to set:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host</td>
<td>Specify the mail server DNS name or IP address.</td>
</tr>
<tr>
<td>Port</td>
<td>Specify the port number to use for communications between the ActiveVOS server and the mail server. The default value is 25.</td>
</tr>
<tr>
<td>From Address</td>
<td>Specify the email address to display in the From field of an email. For example, <a href="mailto:no-reply@example.com">no-reply@example.com</a>.</td>
</tr>
<tr>
<td>Username</td>
<td>Specify the name used to log in to the mail server.</td>
</tr>
<tr>
<td>Password</td>
<td>Specify the password for the user name.</td>
</tr>
<tr>
<td>Security</td>
<td>Optional. Select a security protocol. If you set a security protocol, ensure that the Port you specified supports the protocol.</td>
</tr>
</tbody>
</table>

Configuring the ActiveVOS Email Service

You configure the ActiveVOS email service from the ActiveVOS Console.

If you do not know the location of the ActiveVOS Console or your log in credentials, contact your MDM Hub administrator.

1. Launch the ActiveVOS Console. In a browser, type the following URL, substituting the correct host name and port number:
   
   http://[host]:[port]/activevos

2. Log in to the ActiveVOS Console.

3. Click Admin.

4. Click Configure Services.

5. Click Email Service.

6. Select the Enable check box.

7. Specify the properties for your mail server.

8. Click Update to save your configuration or click Update and Test to save your configuration and send a test mail.
Test the Supplier Portal

Verify that you can launch the Supplier Portal.

1. Open a supported browser.
2. Navigate to the following URL, substituting the host name and the port number:
   
   http://<host name>:<port>/supplierapp-war/mdm/supplierapp/
   
   The Portal opens and displays the images you added.
3. Click Sign Up and register a fictitious organization. Use your email address so that you receive the confirmation email.
   
   If the registration returns with an error, review your PIM system set up to check for problems.
4. If you want to test that the Create Supplier business process is working, complete an application form and submit it.

Test Supplier 360

Supplier 360 runs within Informatica Data Director (IDD). You can log in with your administrative user credentials.

**Note:** The Start workspace contains the Task Inbox and charts. The charts are empty of data until your organization begins adding supplier profiles.

1. Launch Informatica Data Director:
   
   http://<host>:<port>/bdd
   
2. Log in with your user credentials.
3. If prompted to select an application, select InfaSupplierMaster.
   
   Supplier 360 launches and displays the Start workspace.
CHAPTER 6

Business Processes for Supplier Management

This chapter includes the following topics:

- **Business Processes for Supplier Management Overview, 64**
- **Create a Supplier Process, 65**
- **Supplier Profile Change Approval Process, 66**
- **Delete a Supplier Internal Process, 67**

Business Processes for Supplier Management Overview

Business processes automate some common supplier lifecycle management workflows.

The Application ships with ActiveVOS business processes for the following workflows:

- Create a supplier (initiated from the Supplier Portal)
- Create or update a supplier profile (initiated from Supplier 360)
- Delete a supplier (initiated from Supplier 360)

The following descriptions identify the purpose of each process and identifies the people activities within each process. To view the entire process, open the process in the ActiveVOS Console.
Create a Supplier Process

The `CreateSupplierProcess.bpmn` defines a four-step approval process. The process begins when a supplier submits an online application.

The following diagram shows an overview of the process and highlights the people activities.

The first people activity is the commodity evaluation, which requires a commodity manager to review the application. If the commodity manager accepts it, the application moves on to a credit evaluation and then a contract evaluation. The last approval step is a risk evaluation. If the compliance manager believes the risk is acceptable, the manager approves the application and notifies the supplier. At any stage, a manager can reject the application.

The following table summarizes the people activities within the process, the required role, and the possible actions:

<table>
<thead>
<tr>
<th>People Activity</th>
<th>Role Assigned</th>
<th>Possible Actions</th>
</tr>
</thead>
</table>
| Commodity Evaluation | CommodityManager | - Accepts the application. This action sends the application onto the Credit Evaluation step.  
- Rejects the application. This action deletes the pending record containing the changes.  
- Disclaims the task with an explanation so that someone else can claim it. |
| Credit Evaluation       | FinanceManager    | - Accepts the application. This action sends the application onto the Contract Evaluation step.  
- Rejects the application with explanation. This action sends the application back to the Commodity Evaluation step.  
- Disclaims the task with an explanation so that someone else can claim it. |
| Contract Evaluation     | ContractManager  | - Accepts the application. This action sends the application onto the Risk Evaluation step.  
- Rejects the application with explanation. This action sends the application back to the Commodity Evaluation step.  
- Disclaims the task with an explanation so that someone else can claim it. |
| Risk Evaluation          | ComplianceManager | - Approves the application. This action applies the changes to the master data.  
- Rejects the application with explanation. This action sends the application back to the Commodity Evaluation step.  
- Disclaims the task with an explanation so that someone else can claim it. |
Supplier Profile Change Approval Process

The default change approval process is a four-step process. The process begins when a business manager creates or edits a supplier profile.

The following diagram shows an overview of the process and highlights the people activities.

The first people activity is the commodity evaluation, which requires a commodity manager to review the update. If the commodity manager accepts it, the update moves on to a credit evaluation and then a contract evaluation. The last approval step is a risk evaluation. If the compliance manager believes the risk is acceptable, the manager approves the update and notifies the supplier. At any stage, a manager can reject the update.

The following table summarizes the people activities within the process, the required role, and the possible actions:

<table>
<thead>
<tr>
<th>People Activity</th>
<th>Role Assigned</th>
<th>Possible Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commodity Evaluation</td>
<td>CommodityManager</td>
<td>- Accepts the update. This action sends the update onto the Credit Evaluation step. &lt;br&gt;- Rejects the update. This action deletes the pending record containing the changes. &lt;br&gt;- Disclaims the task with an explanation so that someone else can claim it.</td>
</tr>
<tr>
<td>Credit Evaluation</td>
<td>FinanceManager</td>
<td>- Accepts the update. This action sends the update onto the Contract Evaluation step. &lt;br&gt;- Rejects the update with explanation. This action sends the update back to the Commodity Evaluation step. &lt;br&gt;- Disclaims the task with an explanation so that someone else can claim it.</td>
</tr>
<tr>
<td>Contract Evaluation</td>
<td>ContractManager</td>
<td>- Accepts the update. This action sends the update onto the Risk Evaluation step. &lt;br&gt;- Rejects the update with explanation. This action sends the update back to the Commodity Evaluation step. &lt;br&gt;- Disclaims the task with an explanation so that someone else can claim it.</td>
</tr>
<tr>
<td>Risk Evaluation</td>
<td>ComplianceManager</td>
<td>- Approves the update. This action applies the changes to the master data. &lt;br&gt;- Rejects the update with explanation. This action sends the update back to the Commodity Evaluation step. &lt;br&gt;- Disclaims the task with an explanation so that someone else can claim it.</td>
</tr>
</tbody>
</table>
Delete a Supplier Internal Process

The DeleteSupplierProcess.bpel defines a one-step approval process. The process begins when a business manager deletes a supplier profile.

The following diagram shows an overview of the process and highlights the people activity.

When an internal user attempts to delete a supplier profile, the action is sent to a commodity manager to review.

The following table summarizes the people activity within the process, the required role, and the possible actions:

<table>
<thead>
<tr>
<th>People Activity</th>
<th>Role Assigned</th>
<th>Possible Actions</th>
</tr>
</thead>
</table>
| Commodity Evaluation      | CommodityManager | - Accepts the deletion. This action deletes the supplier profile and notifies the supplier.  
                            |                  | - Rejects the deletion. This action preserves the supplier profile and notifies the supplier that the deletion was rejected.  
                            |                  | - Disclaims the task with an explanation so that someone else can claim it.        |
Chapter 7

Customize the Application

This chapter includes the following topics:

- Customize the Application Overview, 68
- Extending the Data Model, 68
- Extending the Business Entities and Business Entity Views, 70
- Customize Edit Privileges for Supplier Profile Pages, 70

Customize the Application Overview

After you configure the Application, you can customize some of the features to better suit your environment. After you customize items, you need to rerun the setup script.

The customization includes extending the data model and customizing the edit privileges for the Supplier Portal pages. If you want to customize other elements of the Application, contact your Informatica representative.

Extending the Data Model

You can extend the Supplier 360 data model by changing the physical schema or by adding types and values to some of the existing tables. You can also add new tables and attributes.

To extend the data model, perform the following steps:

1. Compare your business requirements with the existing schema.
2. List the tables and columns that you want to add.
3. Take a backup of the existing schema.
4. Review the guidelines to extend the data model.
5. Add the tables and columns.
Guidelines for Extending the Data Model

You can modify the definitions of tables or add new tables to the database. Consider the following guidelines when you extend the data model:

- Check if you can use an existing child base object.
- Do not add a root base object to store the person or organization information.
- Do not define tables with names greater than 24 characters.
- Do not delete existing base objects.
- Do not delete existing columns.
- Do not modify the physical names of existing base objects. However, you can modify the display names.
- Do not modify the data type of an existing column.
- Do not decrease the length of an existing column.
- Prefix the names of the new base object tables to distinguish the tables from the existing tables. The prefix indicates the type of table. Use the following naming convention when you create a base object:

<table>
<thead>
<tr>
<th>Prefix</th>
<th>Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>C_XO_</td>
<td>Entity root or child base object.</td>
</tr>
<tr>
<td>C_XR_</td>
<td>Relationship base object.</td>
</tr>
<tr>
<td>C_XT_</td>
<td>Lookup base object.</td>
</tr>
</tbody>
</table>

- If you add a column to an existing table, prefix the name of a column with x_.

For more information about adding tables and columns, see the Informatica MDM Multidomain Edition Configuration Guide.

Guidelines for Adding Base Objects

You can add base objects to extend the data model. You can add root or child base objects, lookup base objects, and relationship base objects.

Consider the following guidelines when you add a base object table:

- **Child base object with one-to-many relationship.** Add a Party Role foreign key in the table to relate the table to the Party Role table.

- **Child base object with many-to-many relationship.** Use the relationship base object to relate the table to the Party Role table.

- **Lookup base object.** Set the LookupIndicator to true.
Extending the Business Entities and Business Entity Views

You can add a business entity or a lookup business entity. You can add a child, field, or reference fields to an existing business entity. You can add a business entity view for an existing business entity. You can create a business entity, and then add a business entity view.

Guidelines for Extending Business Entities and Business Entity Views

Consider the following guidelines when you extend business entities or business entity views:

- When you extend a business entity, add the prefix `Ex` to the names of the new business entities or lookup entities to distinguish them from the existing business entities. For example, `Ex_<BE_NAME>`.
- When you extend a business entity, add the prefix `Ex_` to the names of the new child, field, or referenceOne field. For example, `Ex_<BE_CHILD_NAME>`.
  
  **Note:** A referenceOne field specifies a one-to-one relationship between a parent node and a child reference entity.
- Do not add a new view for an existing business entity. Create a new business entity, and then add the business entity view.
  
- When you extend a business entity view, add the prefix `Ex` to the names of the new child, field, or referenceOne field. For example, `Ex <BE_CHILD_NAME>`.

Customize Edit Privileges for Supplier Profile Pages

For the Supplier Portal, you control the pages that can be edited by supplier representatives and at what stage. For example, you can choose to make some pages not editable in an approved supplier profile. For the pages that remain editable, suppliers decide which of their representatives is responsible for editing the editable pages.

When you make a page non-editable, a supplier must contact a business manager to make changes on behalf of the supplier. For example, if Finance Managers want to know when approved suppliers need to update banking information, you make the Bank page non-editable. Then, when this information requires an update, a supplier representative contacts the Finance Manager. The Finance Manager updates the banking information.

Page edit privileges are controlled through MDM Hub user roles. Supplier Portal user roles are controlled through the Contacts page. When a supplier representative with the appropriate role edits a page and submits the change, the MDM Hub updates the master data.
Default Page Privileges

By default, all Supplier Portal pages are editable during the application process and all pages are non-editable while the application is under review. After a supplier is approved, some pages are editable and some are non-editable.

The following table lists all the Supplier Portal pages and summarizes when each page is editable:

<table>
<thead>
<tr>
<th>Supplier Portal Page</th>
<th>Editable While Filling Out the Online Application Form (Registered)</th>
<th>Editable While the Application is Under Review (Submitted)</th>
<th>Editable in the Approved Supplier Profile (Approved)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Information</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Additional Information</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Products and Services</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Tax</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Bank</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Insurance</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Certificates</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>References</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Sub Suppliers</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Product Related Questions</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Documents</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Contacts</td>
<td>Not available</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Page User Roles and Edit Privileges

You control edit privileges on a page by associating the page with a user role. A page can be in one of three stages, based on the status of the supplier application. You can set a different user role for each combination of page and application status.

Each page has the following possible application statuses:

- Registered. The page is being used as part of the supplier application.
- Submitted. The completed application form is under review by business user.
- Approved. The supplier is approved and the page is now part of the supplier profile.

For page and status, you can assign one of the following page user roles:

- Supplier Administrators. This role makes a page editable by supplier representatives with the Supplier Portal Admin User role and viewable by all supplier representatives.
- Supplier Users. This role makes a page non-editable for all supplier representatives. The page is viewable by all supplier representatives.

For example, if you want the Contacts page to be editable only after the application is approved, you assign the Contacts page with the Approved status to the Supplier Administrators role. You can leave the other
Supplier Portal User Roles and Edit Privileges

Suppliers control which supplier representatives have edit privileges by assigning Supplier Portal user roles. The Supplier Portal user roles grant different privileges to supplier representatives:

- **Admin User.** This role grants edit privileges on all editable pages and view privileges on all non-editable pages.
- **Portal User.** This role grants view privileges on all pages.

After business users approve a supplier, the supplier representative who filled out the supplier application form is assigned the Admin User role. This authorized supplier representative can log in to the Supplier Portal and add additional supplier contact names on the Contacts page. Each contact receives access to the Portal. On the Contacts page, the supplier representative assigns the contact a user role by selecting either Portal User or Admin User.

The following image shows the Contacts page with the Portal User selected.
**<resource> Attributes**

In the `appConfig.xml` file, under `<appSecurity>`, the element `<editableResources>` contains definitions for the Supplier Portal pages that you want to be editable. Each page is defined within a `<resource>` element.

The following table describes the attributes that you can use within the `<resource>` element:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>resourceId</td>
<td><em>Page identifier</em></td>
<td>Identifies the Supplier Portal page. Specify one of the following IDs:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- GENERALINFO</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- ADDITIONALDETAILS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- PRODUCTSANDSERVICES</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- TAX</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- INSURANCE</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- REFERENCES</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- SUBSUPPLIERS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- PRODUCTQUESTIONS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- DOCUMENTS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- CONTACTS</td>
</tr>
<tr>
<td>appStatus</td>
<td><em>Status identifier</em></td>
<td>Identifies the status of the supplier application. Specify one of the following statuses:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Registered. The application is being created.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Submitted. The application is under review by business users.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Approved. The supplier is approved and has access to the supplier profile.</td>
</tr>
</tbody>
</table>

**Editing Page Privileges**

You can define which pages are editable and at what stages. Any given page can have different edit privileges at different stages.

You need to edit the `app-config.xml` file to customize page privileges.

1. In a database tool that supports the BLOB data type, open the table C_REPOS_APP_CONFIG.
2. In the CONFIG_TYPE column, find the row that contains APP_CONFIG.
3. In the CONFIG_DATA column, download the `app-config.xml` file.
4. Open the `appConfig.xml` file in an XML editor.
5. Add or edit the `resource` properties.
6. Save the file.
7. In the CONFIG_DATA column, upload the edited XML file.
Troubleshooting

This chapter includes the following topics:

- Suppliers are not created in Informatica Product 360, 74
- Suppliers report issues with the Products and Services list, 74
- Cannot Log In to the Informatica Data Director Application, 75

Suppliers are not created in Informatica Product 360

When the connection to the PIM Server is interrupted, approved suppliers are not created in Informatica Product 360.

While the PIM Server is inaccessible, the JMS messages that were not received by the PIM Server remain in a pending state. After you re-establish the connection to the PIM Server, you can run a recovery service. The recovery service retrieves all pending messages and processes the messages in the order in which they arrived. The PIM Server receives the pending messages and creates the missing suppliers.

To start the recovery service, run the following REST API:

```
REST API GET URL: http://<host>:<port>/supplierapp-war/services/jms/recovery
```

The message “Recovery service started” appears. The recovery service retrieves all the pending messages and processes the messages in the order in which they arrived.

Suppliers report issues with the Products and Services list

In the Supplier Portal on the Product and Services page, when a supplier representative clicks the root node for a set of products or services, not all child nodes are selected.

The Supplier Portal uses a SIF search request to retrieve the contents of the list. Two properties control how many records a SIF search request returns: GETLIST Limit and pageSize. The value of the GETLIST Limit property must be equal to the value of the pageSize property. When the values are different, the Supplier Portal uses the lower value. If one or both values are too low, the entire list is not returned.
To resolve this issue, first check if the value of both properties are the same.

- If the values are different, increase the lower value to match the other value.
- If the values are the same, increase the value of both properties.

For instructions about finding and setting these properties, see the following topics:

- "Setting the Value of the GETLIST Limit Property" on page 57
- "Configure the Supplier 360 Properties" on page 33

Cannot Log In to the Informatica Data Director Application

When you try to log in to the Informatica Data Director application, the login fails.

After you deploy the InfaSupplierMaster application, the user roles might lose their assigned privileges. The login fails because your credentials might not have sufficient privileges to log in.

To reassign all the privileges to the user roles, promote the following change list to the Operational Reference Store:

  <MDM installation directory>/app/tsr/hub/schema/met-export/SUPPLIER_hub_change.xml
CHAPTER 9

MDM - Supplier 360 Upgrade

This chapter includes the following topics:

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- Extracting the Application, 76
- Importing the Database Schema, 77
- Adding JBoss Remoting JAR Files to Lib Folder, 78
- Installing the Application Configuration Tool, 78
- Enabling the HTTPS Protocol, 78
- Setting the cmx.dataview.enabled Property to True, 79
- Verifying the S360 Application Settings, 79
- Installing S360, 80

Upgrade Overview

To upgrade to MDM - Supplier 360 10.1, you must first import the database schema from a change list. You must install the Appconfiguration application and verify the global S360 properties. Then you install S360.

Extracting the Application

You receive the S360 application as an archive file. Create the following directory structure and extract the contents of the S360 archive file into it:

<MDM Installation Directory>/app/tsr

The extracted content contains the following files and folders:

- bin/. Contains build files, the setup script, and an uninstall wizard.
- bpm/. Contains the ActiveVOS email service and the default business processes in a deployable format.
- config/. Contains configuration properties files.
- datamart/. Contains the data-mart service and the chart configurations.
- **email-config/**. Contains the directory that defines the email templates. The email templates are used by the ActiveVOS email service.
- **templates/**. Contains the avos-templates and pim-templates subdirectories with email body text templates for ActiveVOS and for Informatica Product 360.
- **hub/**. Contains the subdirectories that contain the database schema and the configuration files to deploy to Informatica Data Director (IDD).
- **cocoaconfig/**. Contains configuration files for composite objects and composite services.
- **entity360config/**. Contains copies of the Entity 360 component instance definitions that ship with Informatica MDM.
- **idd/**. Contains the configuration files that you use to create the S360 interface in Informatica Data Director.
- **schema/**. Contains the database schema for supplier data and reference data.
- **images/**. Contains placeholder images for a logo and for a background image for the Supplier Portal login page.
- **pre-install-config/**. Contains a file to set global Application properties and a file to set the list of products and services in the Supplier Portal.
- **userprofile-provider/**. Contains the configuration files that you use after the installation is finished. Contains the appconfig.properties, PIMloginProvider.jar, and RoleMappingSource.xml files.
- **lib/**. You must include external libraries in this folder. If you use a JBoss application server, copy the jboss-ejb-client, jboss-remote-naming, jboss-remoting, xnio-nio, and xnio-api files to the folder.
- **supplierapp-ear.ear** file.
- **appconfiguration.war** file.

## Importing the Database Schema

The metadata for the supplier database schema resides in an MDM Hub change list. You import the change list into the Hub Store. The metadata change list creates components, such as landing tables, user exits, lookup tables, staging tables, base objects, and match and merge rules. The created tables are empty.

1. In the Hub Console, in the Configuration workbench, click **Repository Manager**.
2. Click the **Import** tab.
3. Click the button next to the Source field.
   The Open Repository dialog box opens.
4. Click **File Repository**.
5. Navigate to the following directory:
   `<MDM installation directory>/app/tsr/hub/schema/met-export`
6. Select the `SUPPLIER_hub_change.xml` file, and click **OK**.
7. From the Target field, select `supplier_hub`.
8. Select all the schema components and click **Apply**.
   The Repository Manager imports the selected components from the change list.
9. Click **Verify Repository**.
Adding JBoss Remoting JAR Files to Lib Folder

If you use a JBoss application server, you must add the JBoss remoting JAR files to the `app/tsr/lib/` folder. Based on the JBoss version, download the following files from Maven repository to the `app/tsr/lib/` folder:

- jboss-ejb-client
- jboss-remote-naming
- jboss-remoting
- xnio-nio
- xnio-api

Installing the Application Configuration Tool

To install the Application Configuration tool, run the `install-tsrs` script.

1. At a command prompt, navigate to the following directory:
   ```
   <MDM installation directory>/app/tsr/bin
   ```
2. Run one of the following scripts:
   - On Windows, `install-tsrs.bat`
   - On Linux, `./install-tsrs.sh`
3. At the prompts, enter the following parameters:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDM Hub installation directory</td>
<td>Press Enter to use the default path or type the fully-qualified path to the directory where you installed Informatica MDM Hub.</td>
</tr>
<tr>
<td>MDM Supplier 360 Application installation directory</td>
<td>Press Enter to use the default path or type the fully-qualified path to the directory that contains the Application files.</td>
</tr>
<tr>
<td>Application Server</td>
<td>Type the name of the application server in lowercase.</td>
</tr>
<tr>
<td>Application to deploy</td>
<td>Type appconfig.</td>
</tr>
</tbody>
</table>

Enabling the HTTPS Protocol

If the MDM Hub and Informatica Product 360 are configured to use the HTTPS protocol, enable the HTTPS protocol for the Supplier 360 components.

1. Extract the `InfasSupplierMaster.zip` file located in the following directory:
   ```
   <MDM installation directory>/app/tsr/hub/idd
   ```
2. In a text editor, open the `BDDConfig.xml` file.
3. In the XML file, search for the following entries:
   - `<externallink name="supplier_doc_child_link" type="IFRAME" url="http://@LOCALHOST:}@LOCALPORT@/supplierapp-war/mdm/supplierapp/document">
   - `<externallink displayname="App Configuration" name="appconfig" type="IFRAME" url="http://@LOCALHOST:}@LOCALPORT@/appconfiguration">

4. In the `url` parameter of the selected entries, change `http` to `https`.

5. Save the XML file.

6. Log in to the IDD Configuration Manager, and select the application.

7. Click `Import > Import to existing IDD application`.

8. In the `Import to existing IDD application` dialog box, select `BDD Configuration`.

9. Click `Browse`, and select the `BDDConfig.xml` file.

10. Click `Import`.

---

### Setting the cmx.dataview.enabled Property to True

The `cmx.dataview.enabled` option specifies whether the Data workspace, Application Configuration, and related elements appear in IDD applications. When `cmx.dataview.enabled=true`, you can view the Application Configuration tab.

1. Navigate to the following directory:
   `<MDM installation directory>/hub/server/resources`

2. Use a text editor to open the `cmxserver.properties` file.

3. Set `cmx.dataview.enabled=true`.

4. Save and close the file.

5. Validate the schema and redeploy the IDD application.

6. Restart the application server.

---

### Verifying the S360 Application Settings

Verify the global S360 application settings in the Application Configuration tool.

1. Launch Informatica Data Director.

2. Log in with your user credentials.

3. If prompted to select an application, select `InfSupplierMaster`.

4. Click `App Configuration`.

5. On the `Connections` tab, verify the connection parameters.

6. On the `Properties` tab, verify the properties.
Installing S360

To install S360, run the `install-tsr` script.

1. At a command prompt, navigate to the following directory:
   `<MDM installation directory>/app/tsr/bin`

2. Run one of the following scripts:
   - On Windows, `install-tsr.bat`
   - On Linux, `install-tsr.sh`

3. At the prompts, enter the following parameters:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDM Hub installation directory</td>
<td>Press Enter to use the default path or type the fully-qualified path to the directory where you installed Informatica MDM Hub.</td>
</tr>
<tr>
<td>MDM Supplier 360 Application installation directory</td>
<td>Press Enter to use the default path or type the fully-qualified path to the directory that contains the application files.</td>
</tr>
<tr>
<td>Application Server</td>
<td>Type the name of the application server in lowercase.</td>
</tr>
<tr>
<td>Application to deploy</td>
<td>Type tsr.</td>
</tr>
<tr>
<td>avos console username</td>
<td>Type the ActiveVOS Console username.</td>
</tr>
<tr>
<td>avos console password</td>
<td>Type the ActiveVOS Console password.</td>
</tr>
</tbody>
</table>

The script updates the `supplier-ear.ear` file.
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