



Data Sheet

# How to Perform Role-Based Testing in Informatica MDM

The One-Stop Guide

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## Overview:

Users interact with Informatica's MDM system differently depending on their roles and responsibilities. For example, data stewards are responsible for data governance and quality.

Role-based testing focuses on validating the functionality and behavior of the MDM system from the perspective of different user roles. It identifies various roles & responsibilities within the MDM system and the access levels associated with each role.

## 5 steps to performing role-based testing in Informatica MDM

### 1. Identify User Roles

Start by identifying the different user roles interacting with Informatica's MDM system such as data stewards, business users, administrators, data analysts, etc.

### 2. Define Test Scenarios

Test scenarios must specify the services and accessibility assigned to each user. For instance:

- **Data Steward:** Perform data cleansing, data matching, and data merging tasks.
- **Business User:** Search and retrieve master data records for business processes.
- **Administrator:** Configure security settings, manage user permissions, and maintain the MDM system.

### 3. Create Test Cases

Based on the test scenarios, create test cases that validate the functionality and behavior of the MDM system for each user role. Test cases should cover areas such as data entry, data validation, data retrieval, workflow processing, security, and permissions.

### 4. Execute Test Cases

This includes logging into different user accounts and testing the tasks according to the defined test scenarios. Log into the user account and note down the user's accessibility.

- **Administrator**

Log in using the admin credential. Users need to follow 'step a' to 'step b'. Admin has access to configuring security settings, managing user permissions, and maintaining the MDM system. The admin can view records, edit records, perform match and merge, & more.

- **Data Steward**

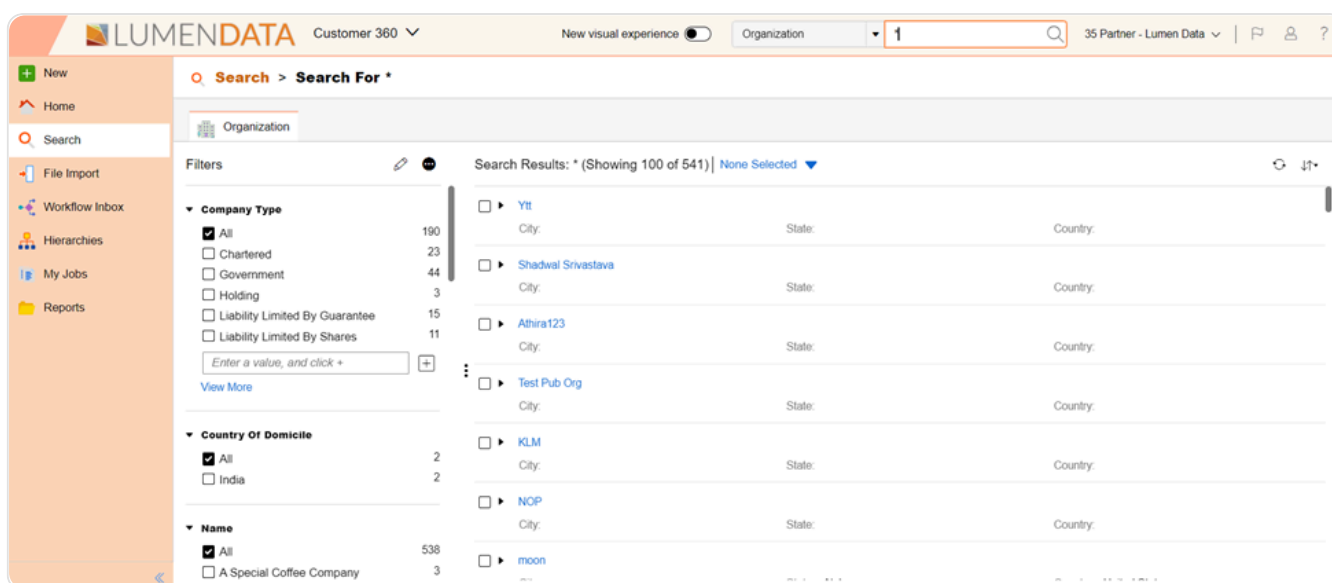
Log in using the data steward credential. Follow 'step a' to 'step e'. Data stewards can perform data cleansing, data matching, and data merging tasks.

- **Business User**

Log in using the business user credential. Follow 'step a' only. Business users can search and retrieve master data records for business processes.

Verify if the user can view and select data from Customer360.

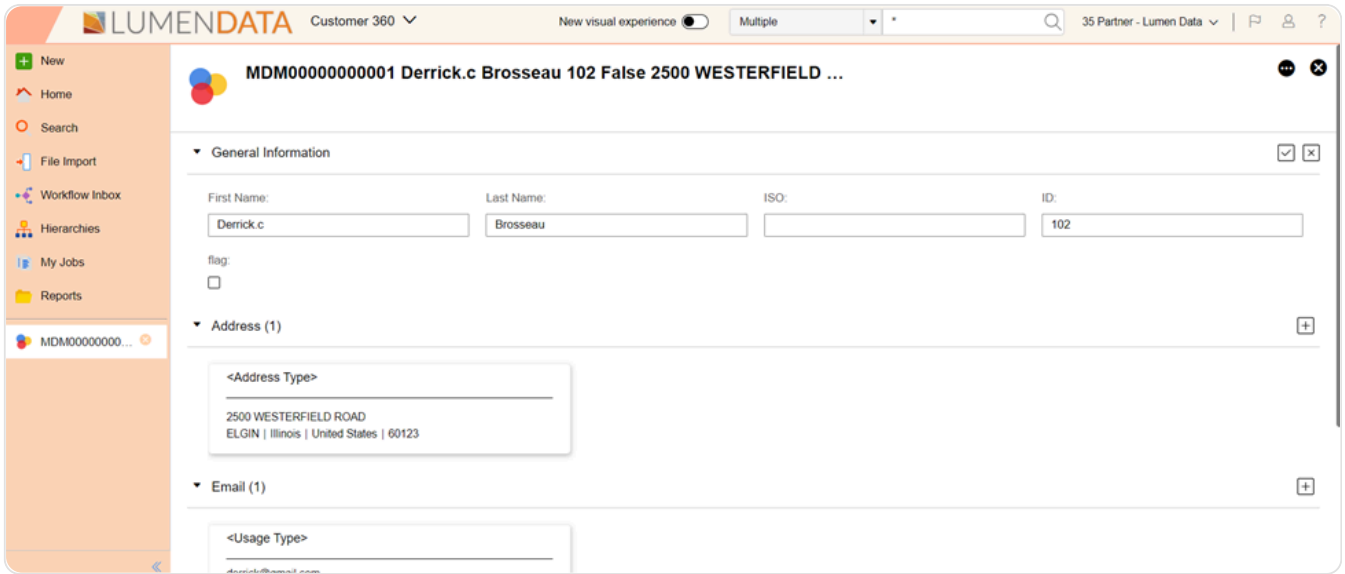
**Expected Result:** The user should be able to view and select data from Customer360.



Verify if the user can edit the record and save changes.

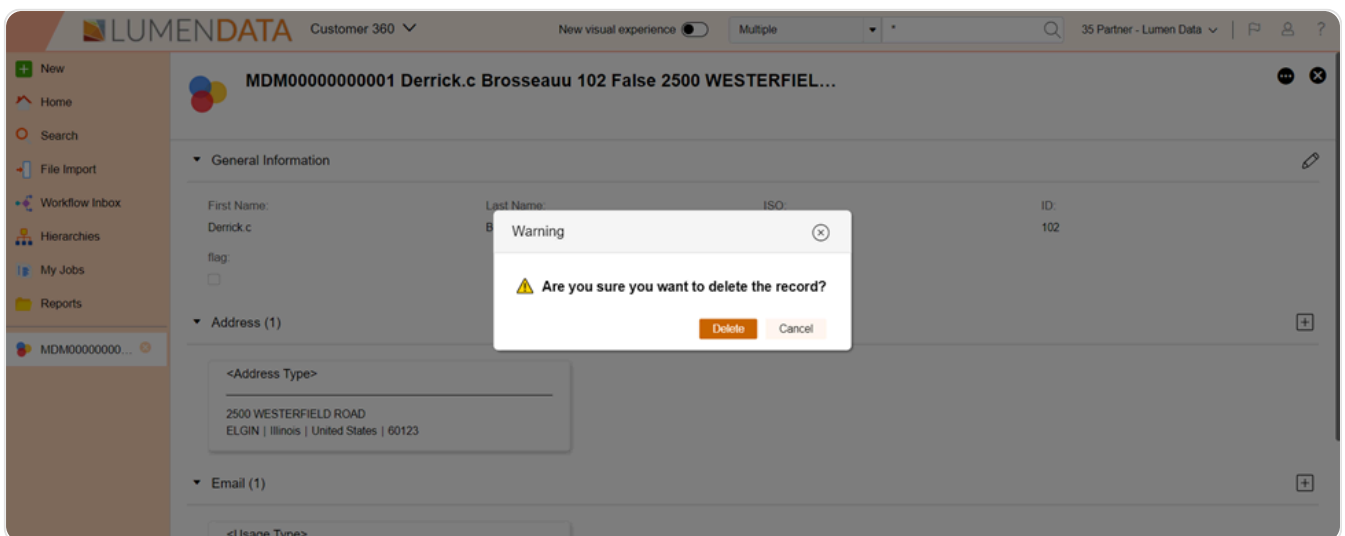
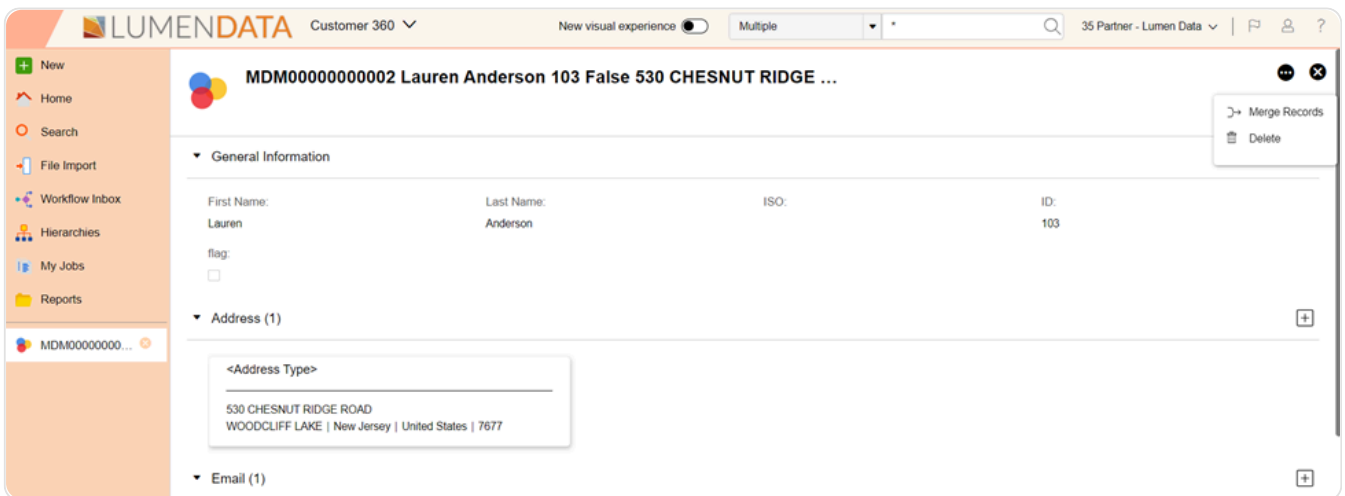
**Expected Result:** The user should be able to edit records and save changes.

# How to Perform Role-Based Testing in Informatica MDM

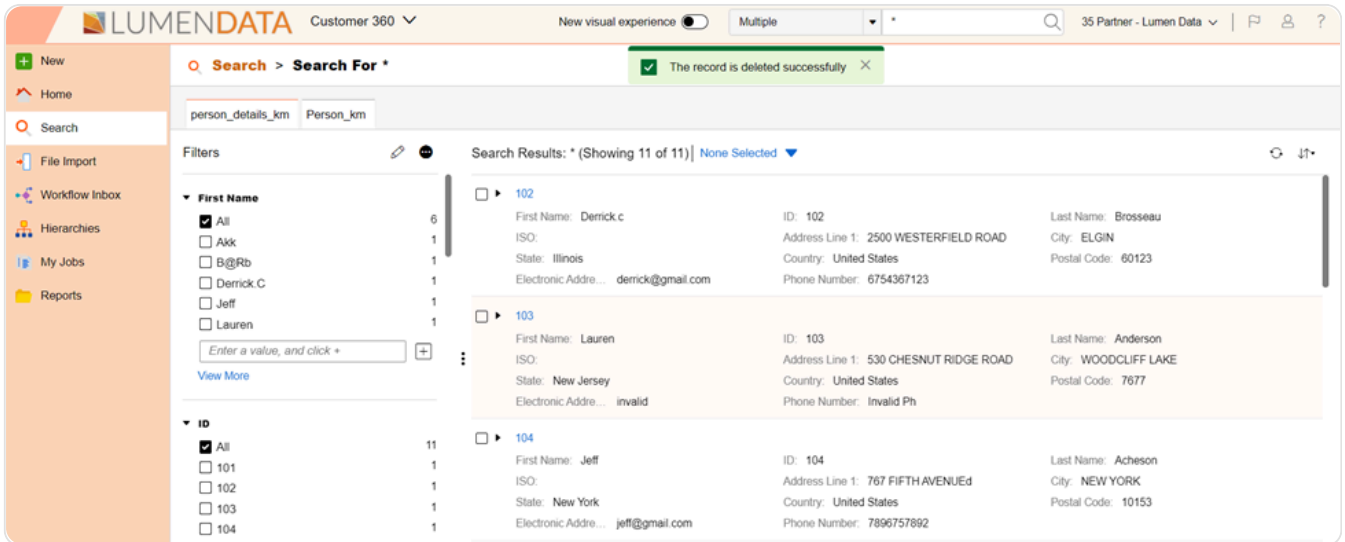


Verify if the user can delete records.

**Expected Result:** The user should be able to delete records.

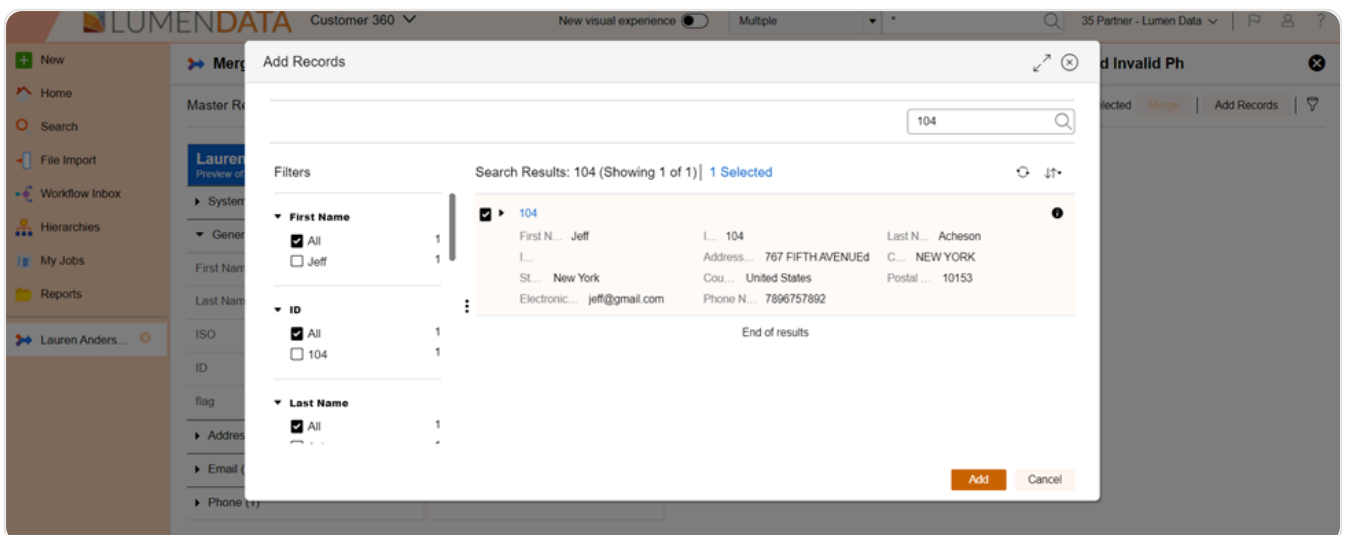
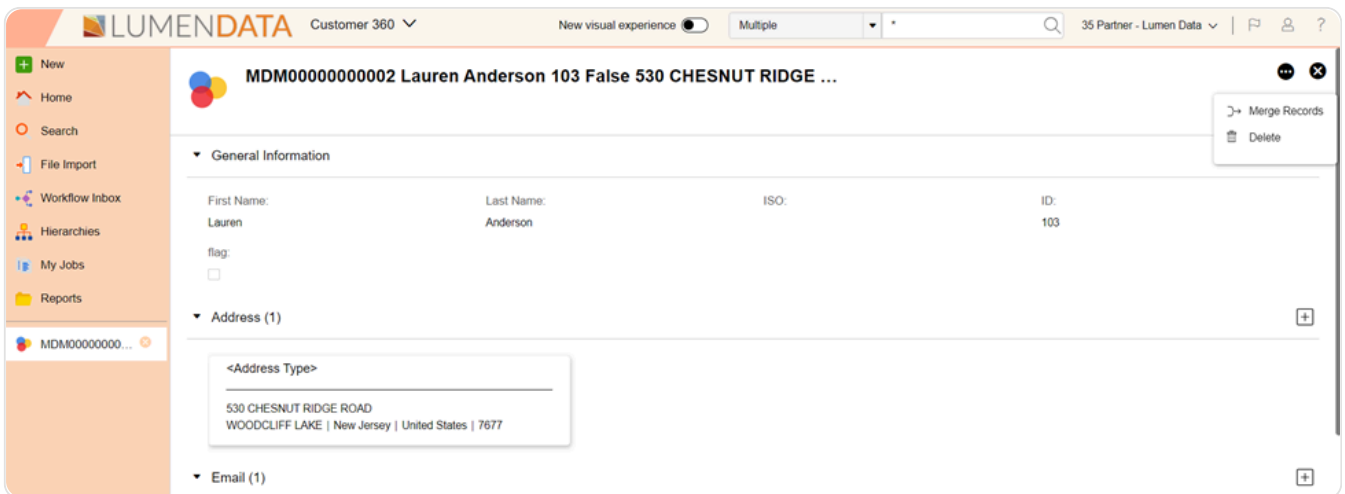


# How to Perform Role-Based Testing in Informatica MDM

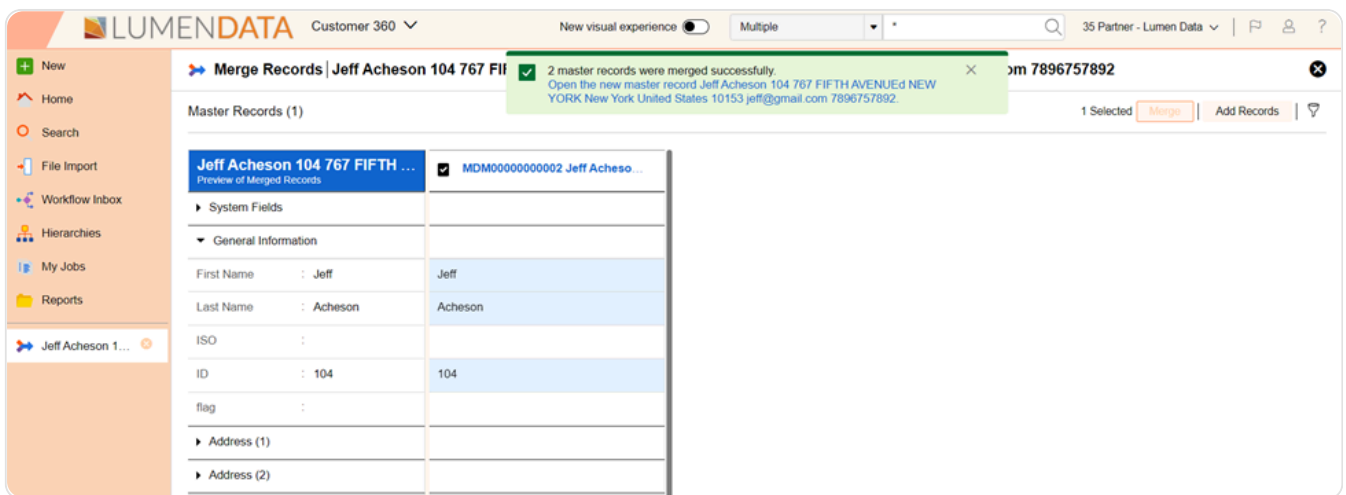
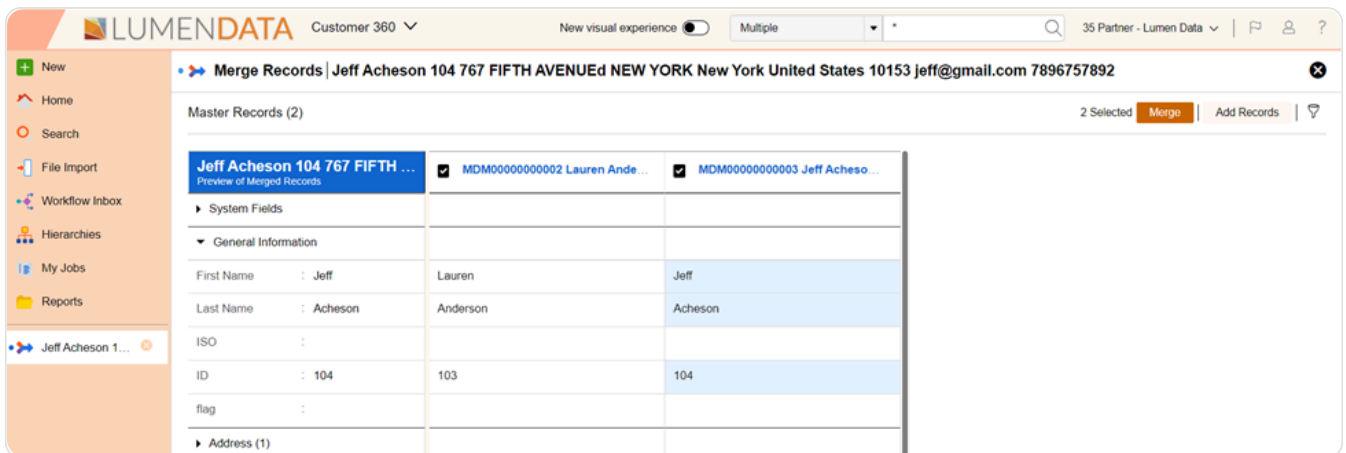


Verify if the user can view matched records and merge them manually.

**Expected Result:** The user should be able to see matched records and merge them manually.

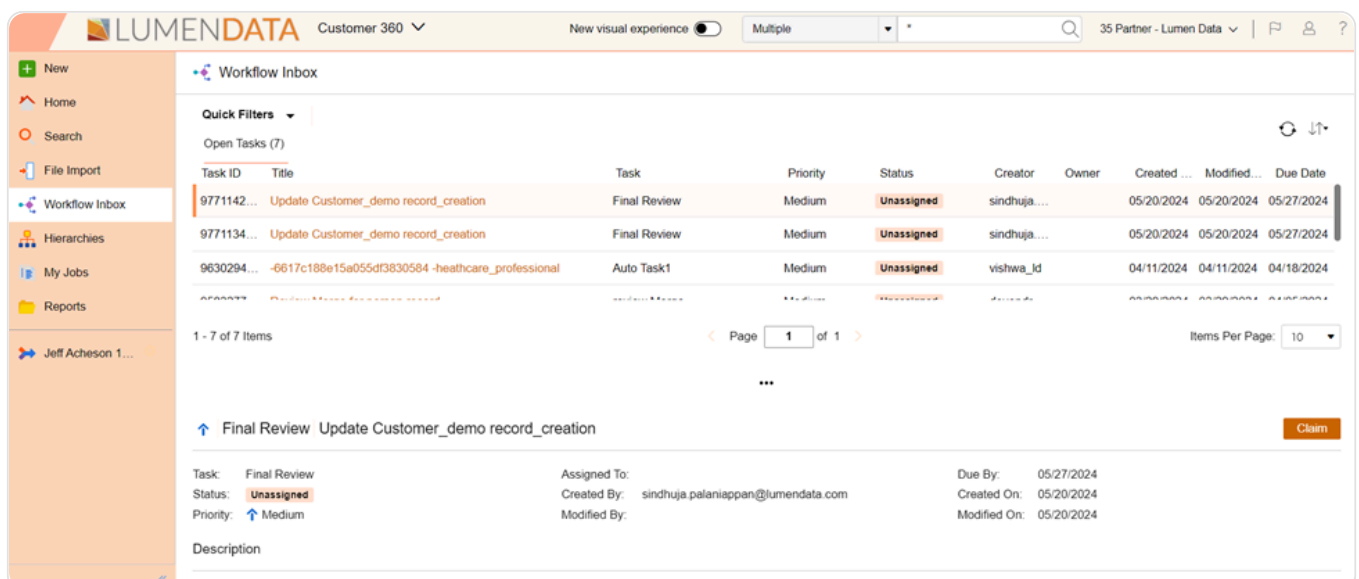


# How to Perform Role-Based Testing in Informatica MDM



Verify if the user can view the task in the workflow and claim them.

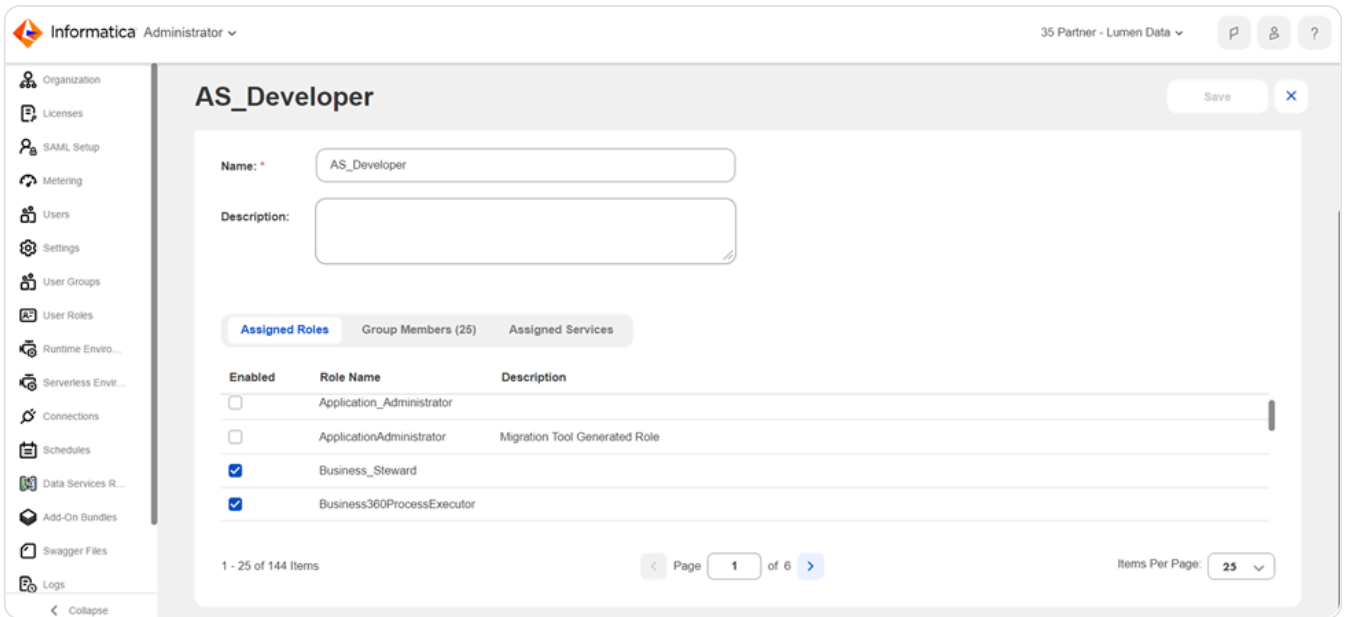
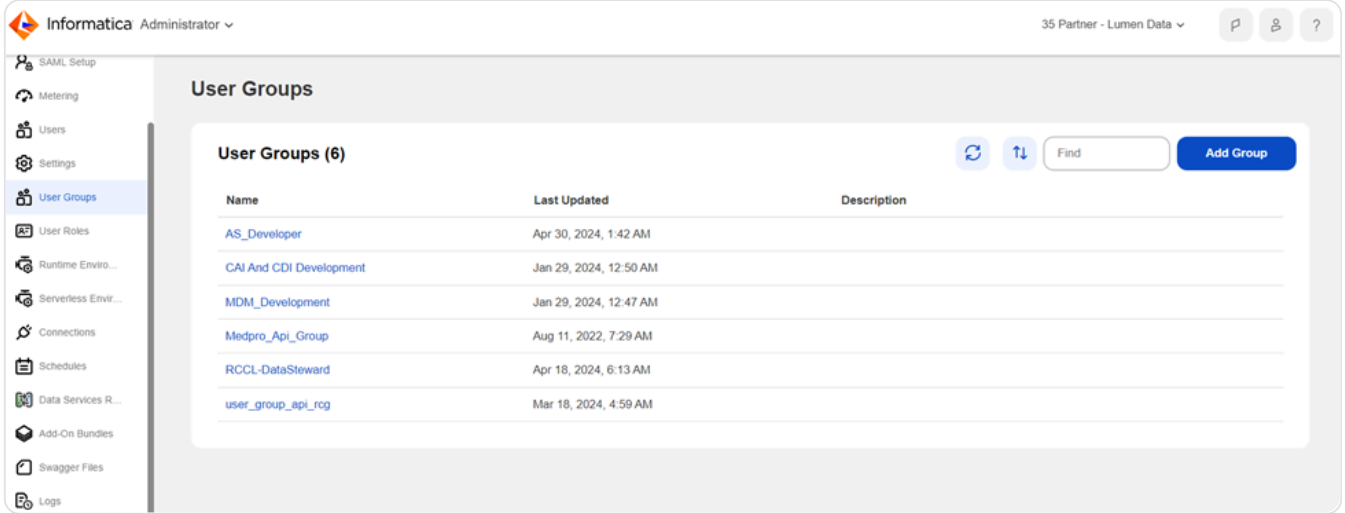
**Expected Result:** The user should be able to see the tasks in the workflow and claim them.



# How to Perform Role-Based Testing in Informatica MDM

Verify if the user can view and create user groups.

**Expected Result:** The user should be able to view and create user groups.



Verify if the user can view and create user roles.

**Expected Result:** The user should be able to view and create user roles.

# How to Perform Role-Based Testing in Informatica MDM

Informatica Administrator 35 Partner - Lumen Data

### User Roles

Select the role you want to modify or define a new role.

User Roles (136) Find

Name	Last Updated	Status	Description
Data Marketplace Administra...	May 9, 2024, 9:39 PM	Enabled	The Administrator of Data Marketplace. As a Data Marketplace Administrator, you are responsible for configuring D...
Data Marketplace Category ...	May 9, 2024, 9:39 PM	Enabled	The Category Owner of a category in Data Marketplace. As a Category Owner, you are responsible for a category a...
Data Marketplace Data Colle...	May 9, 2024, 9:39 PM	Enabled	The Data Owner of a data collection in Data Marketplace. As a Data Owner, you publish or unpublish the collections...
Data Marketplace Data Colle...	May 9, 2024, 9:39 PM	Enabled	The Technical Owner of a data collection in Data Marketplace. As a Technical Owner, you are responsible for delive...
Data Marketplace Delivery T...	May 9, 2024, 9:39 PM	Enabled	The Delivery Owner of a delivery template in Data Marketplace. As a Delivery Owner, you manage the delivery opti...
Data Marketplace Technical ...	May 9, 2024, 9:39 PM	Enabled	The Technical Administrator of Data Marketplace. As a Technical Administrator, you are responsible for managing d...
Data Marketplace User	May 9, 2024, 9:39 PM	Enabled	As a Data User, you can search for and order data collections that are published to Data Marketplace.
Deployer	Jun 22, 2023, 7:31 AM	Enabled	Role used by deployer
Designer	May 18, 2024, 1:47 AM	Enabled	Role for creating assets, tasks, and processes. Can configure connections, schedules, and runtime environments. H...
ErrorHandlingUserRole	Apr 21, 2022, 8:26 AM	Enabled	
#f1_BusinessUser	Mar 25, 2024, 12:16 PM	Enabled	Migration Tool Generated Role
#f1_DataAdmin	Mar 25, 2024, 12:16 PM	Enabled	Migration Tool Generated Role

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### 008\_DataSteward

Save X

Set the privileges for users and groups assigned to the role. Configure privileges separately for each service.

Role Information

Role Name: 008\_DataSteward

Description: Migration Tool Generated Role

Services: Administrator

Asset Type	Create	Read	Update	Delete	Run	Set Permission
Connection	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Elastic Configuration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Folder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OAuth Client	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Privilege	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scheduler Blackout	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Verify if the user can view and create users.

**Expected Result:** The user should be able to view and create users.



# How to Perform Role-Based Testing in Informatica MDM

The screenshot shows the Informatica Administrator interface for the 'Users' section. The top navigation bar includes 'Informatica Administrator' and '35 Partner - Lumen Data'. The left sidebar lists various system components like SAMI Setup, Metering, Users, Settings, User Groups, User Roles, Runtime Environment, Serverless Environment, Connections, Schedules, Data Services, Add-On Bundles, Swagger Files, Logs, Advanced Clusters, and File Servers. The main content area displays user statistics: 108 Total Users, with 92 Enabled, 8 Pending Activation, 8 Disabled, and 0 Locked. It also shows 36 users logged in the last 30 days. A table lists users with columns for User Name, Full Name, Phone Number, Status, Groups, Roles, and Last Login. The table includes users like Adarsh.id, aditya\_test\_id\_pre..., aditya.k.id, and aditya.raturi.

User Name	Full Name	Phone Number	Status	Groups	Roles	Last Login
Adarsh.id	Adarsh Sinha	9999999992	Enabled	AS_Developer	Application_Admin...	May 2, 2024, 12:3...
aditya_test_id_pre...	Aditya Kumar		Pending Activation	No Groups	Customer 360 Dat...	
aditya.k.id	Aditya Kumar	8340700781	Enabled	No Groups	Reference 360 PI...	May 16, 2024, 4:3...
aditya.raturi	Aditya Raturi	4566574758	Enabled	No Groups	Job Executor, Cus...	Mar 22, 2024, 8:2...

The screenshot shows the Informatica Administrator interface for the user 'athira.km.id1'. The top navigation bar includes 'Informatica Administrator' and '35 Partner - Lumen Data'. The left sidebar is the same as in the previous screenshot. The main content area is titled 'athira.km.id1' and includes a 'Save' button. Below the title, it says 'Define the user account settings, including group and role assignments.' A table titled 'Assigned User Groups and Roles' lists various roles with checkboxes for 'Enabled' and 'Role Name' and 'Description'. The roles include AS\_Developer, CAI And CDI Development, MDM\_Development, Medpro\_Api\_Group, RCCL-DataSteward, user\_group\_api\_rcg, 008\_BusinessUser, 008\_DataAdmin, 008\_DataSteward, 008\_ITAdmin, 008\_SeniorDataSteward, Admin, API Policy Manager, API\_Integration\_rcg, Application Integration Busin..., Application Integration Data ..., ApplicationAdministrator, Application\_Administrator, Business360ProcessExecutor, Business\_Steward, CustomC360DataSteward, CustomC360DataSteward11, and Customer 360 Analyst.

Enabled	Group Name	Description	Enabled	Role Name	Description
<input checked="" type="checkbox"/>	AS_Developer		<input type="checkbox"/>	008_BusinessUser	Migration Tool Generated Role
<input type="checkbox"/>	CAI And CDI Development		<input type="checkbox"/>	008_DataAdmin	Migration Tool Generated Role
<input type="checkbox"/>	MDM_Development		<input type="checkbox"/>	008_DataSteward	Migration Tool Generated Role
<input type="checkbox"/>	Medpro_Api_Group		<input type="checkbox"/>	008_ITAdmin	Migration Tool Generated Role
<input type="checkbox"/>	RCCL-DataSteward		<input type="checkbox"/>	008_SeniorDataSteward	Migration Tool Generated Role
<input type="checkbox"/>	user_group_api_rcg		<input checked="" type="checkbox"/>	Admin	Role for performing administrative tasks for an organi...
			<input type="checkbox"/>	API Policy Manager	Role to manage API policy.
			<input type="checkbox"/>	API_Integration_rcg	
			<input checked="" type="checkbox"/>	Application Integration Busin...	Role used for business managers
			<input checked="" type="checkbox"/>	Application Integration Data ...	Role used for granting access for data
			<input checked="" type="checkbox"/>	ApplicationAdministrator	Migration Tool Generated Role
			<input checked="" type="checkbox"/>	Application_Administrator	null
			<input checked="" type="checkbox"/>	Business360ProcessExecutor	null
			<input checked="" type="checkbox"/>	Business_Steward	
			<input type="checkbox"/>	CustomC360DataSteward	A role to view Application Integration designer and as ...
			<input type="checkbox"/>	CustomC360DataSteward11	Migration Tool Generated Role
			<input checked="" type="checkbox"/>	Customer 360 Analyst	Customer 360 role for Analysts

## 5. Complete Execution

Make sure that the MDM system meets the requirements and expectations of different user roles within the organization. This way, data is managed well among different users.

## Authors

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### About LumenData

LumenData is a leading provider of **Enterprise Data Management, Cloud & Analytics** solutions. We help businesses navigate their data visualization and analytics anxieties and enable them to accelerate their innovation journeys.

**Founded in 2008**, with locations in multiple countries, LumenData is privileged to serve over 100 leading companies. LumenData is **SOC2 certified** and has instituted extensive controls to protect client data, including adherence to GDPR and CCPA regulations.



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