

Factsheet

# Make master data management and quality data the cornerstones of your data-driven company



## Master Data Management Solution

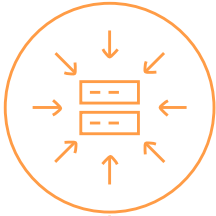
For Microsoft Dynamics 365 for Finance and Supply Chain Management

# How can our embedded Master Data Management Solution help your business?

HandsFree ERP & Master Data Management Solution is an end-to-end master data management, data quality, data creation, and data governance software designed to help you control your master data and define data ownership, in line with your company's data governance program. Built within Dynamics 365 F&SCM, this no-code solution helps you create, update, validate, de-duplicate, distribute, and secure data in D365, without any need for development.

- ✔ Achieve a single source of truth through centralized or decentralized master data ownership
- ✔ Easily manage the creation, validation, and distribution of master data among D365 F&SCM companies and across external systems from within D365 F&SCM
- ✔ Easily create and update master data using flexible data entry forms in D365 F&SCM and enable approvals for master data
- ✔ Ensure uniform, manageable, accurate, consistent, and accountable data in D365 F&SCM
- ✔ Gain business insights with trusted data to make informed business decisions and manage security of master data records
- ✔ Deliver consistent and reliable data to all your stakeholders for improved operational effectiveness and customer satisfaction
- ✔ Enable quick understanding and reporting on critical information
- ✔ Easily add a layer of content-based and record-based table and field security to master data records in D365 F&SCM
- ✔ Ensure integrated data governance with a role-based workflow-driven structure

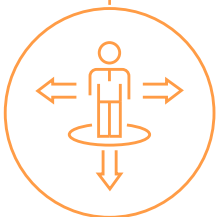
# Benefits you gain from Master Data Management Solution



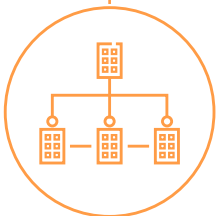
Centralize data management to a single master copy for data stewards to manage and oversee. Consequently, business users get consistently high-quality data.



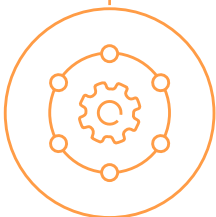
Eliminate duplicate data by automating the data quality process. Automation saves costs and enables standardization across multiple sources to create one source of the truth.



Ensure smooth processing of data entry by guiding users with only the fields they are responsible for and have a data steward or data owner approve the whole record before releasing it.



Manage the master data; centrally (when there is one owner of the master data) and de-centrally (when different legal entities or companies own the data).



Improve operational productivity by eliminating poor data quality across departments, companies, and application landscapes.



Enable non-technical data owners and data stewards to manage master data flows, set up validation rules, and collaborate with the IT team effectively.



Enable control of master data and ensure data integrity with a formalized approach to making changes to master data.



Synchronize the central master data with different systems, companies, and applications securely.

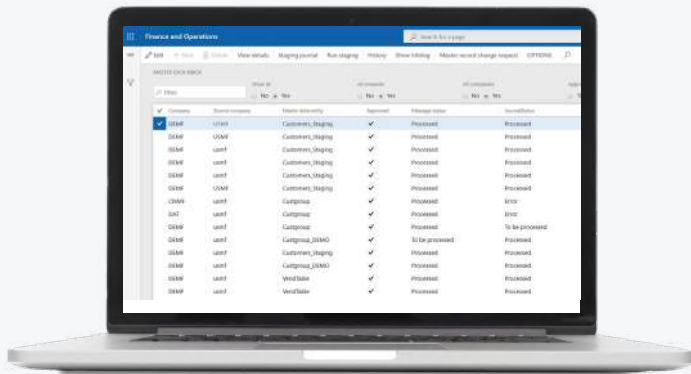


Gain insights into the status of master data creation and enable field-based security to prevent local companies from changing the master data records locally.



Ensure data compliance with access to operational data of sufficient completeness, validity, accuracy, granularity and security.

# Key Features – Master Data Management

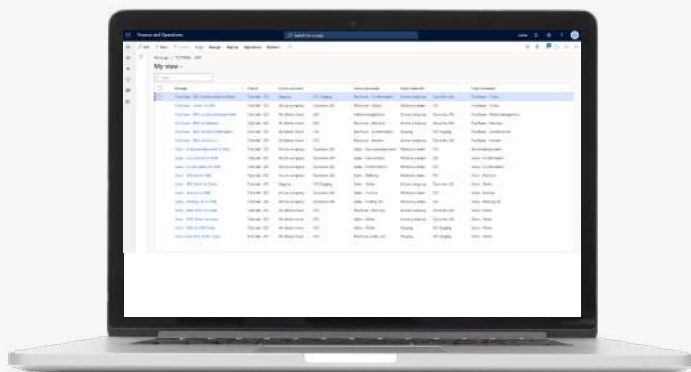
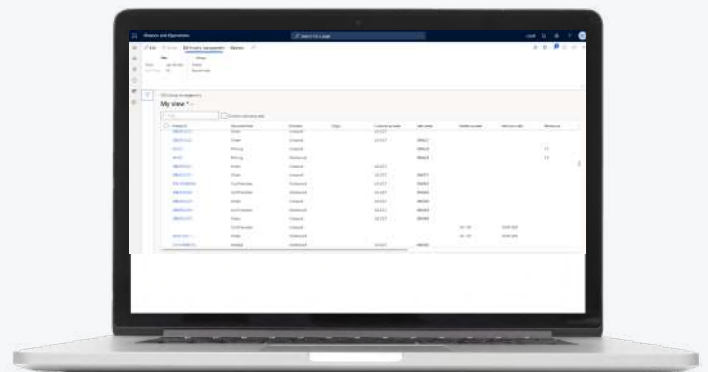


## Empower data stewards

By making data owners and data stewards responsible for the management and proficiency of the data stored, Master Data Management Solution ensures control, quality, and approval of master data updates and changes. Data stewards can ensure that data access is only given on a role-based or need-based case and that users cannot make modifications without approval.

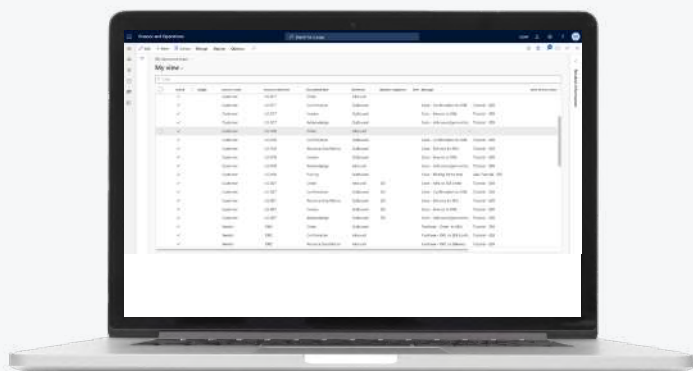
## Enhanced change request management

Ensure master data change requests pass through appropriate approvals before being implemented. Manage changes in data structures, value lists, the inclusion of new data sources, changes in new regulations, etc. All these organizational means are comprised in the design for data governance, including the organization model and assigned responsibilities.



## Dynamic field security

A feature that allows you to control which fields are allowed to be changed depending on the user, a lifecycle stage, or other conditions of the record. You can also control the fields available in local companies. As this feature is built as a framework, it can be used for field-based security on other entities as well.

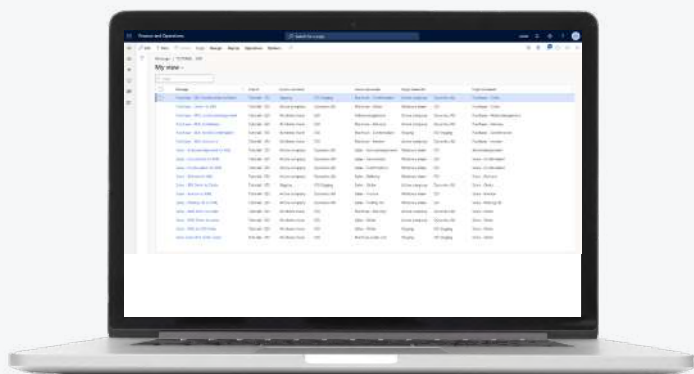
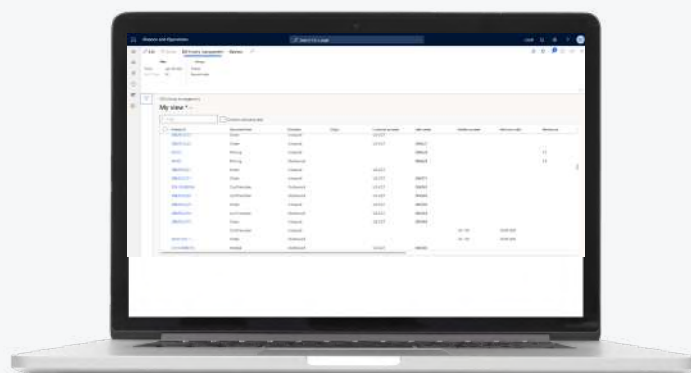


## Flexible data mapping

Create different mappings for global data, regional data, and local data in case you do not want to share all the master data details with all companies or systems.

## Dynamic staging tables

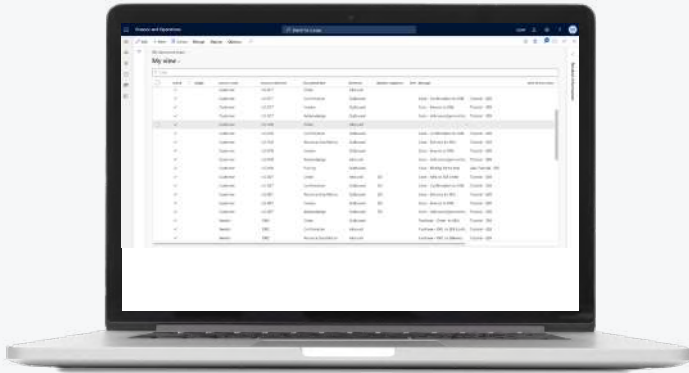
The optional use of dynamic staging tables provides an additional mechanism to validate data and automate the release processes. When a staging area is used, the data stewards can validate the inbound master data and receive it from a central inbox.



## Multiple MDM entities

Determine and model the master data you would like to share like items, products, customers, vendors, employees, projects, and more. You can also set up groups on different parameters.

# Key Features – Data Quality Management

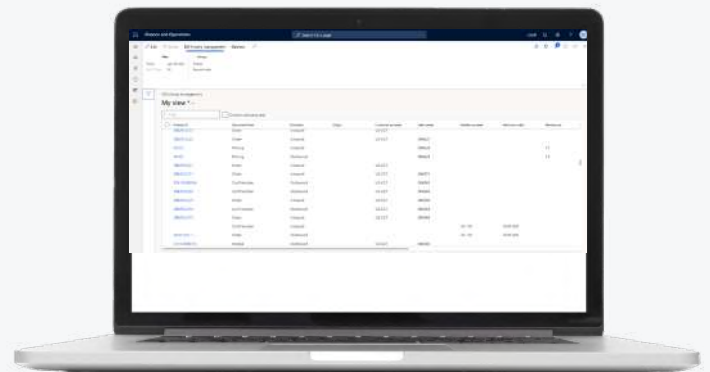


## Data quality policies

Setup additional validation or enrichment rules at the field or record level to ensure employees enter the correct values. These rules can be set conditionally for legal entities or based on the value/content in fields or tables.

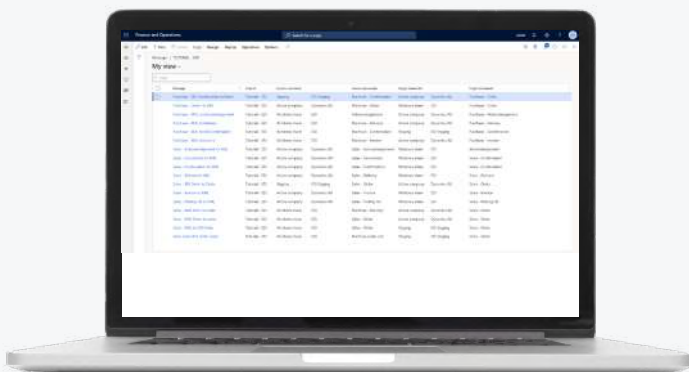
## Data patterns & web services

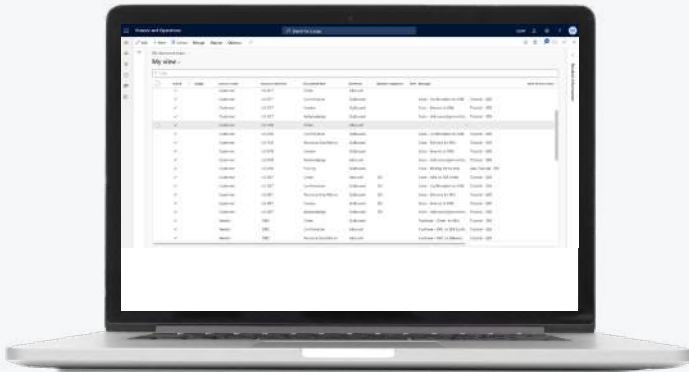
Set up your data patterns in the data validation rules to enforce the correct formatting of the data entered. Create integrations with own or third-party web services to check for valid data or data enrichment from a trusted source.



## Data cleansing and enrichment

You can setup data actions which allows you to auto complete fields with certain values. They can be setup as conditional, so the values can be different according to your business requirements.



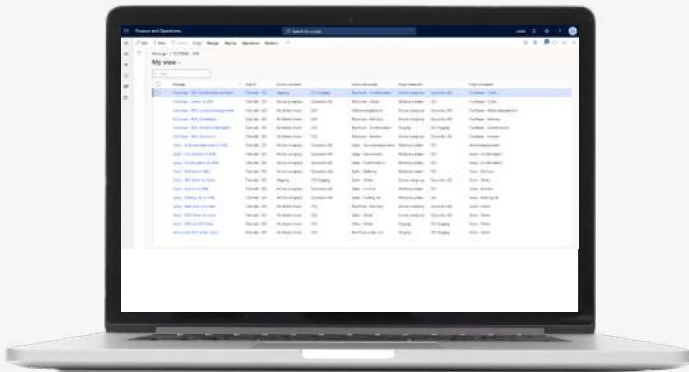
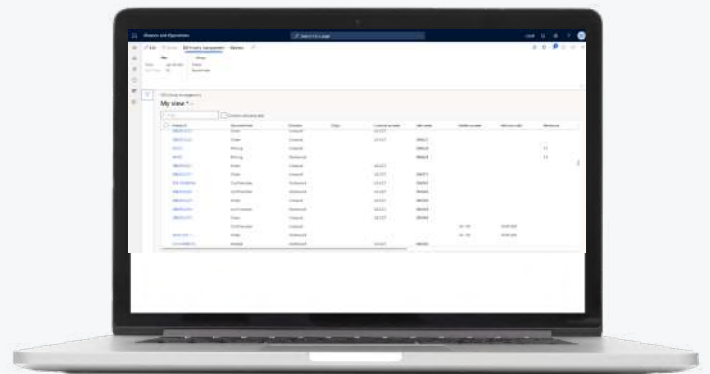


## Data validation

On field- or record-level, you can setup additional validation rules which will ensure the correct values are entered by the employees. These rules can be set conditional per legal entity, user, or data contents in other fields or tables.

## Duplicate check

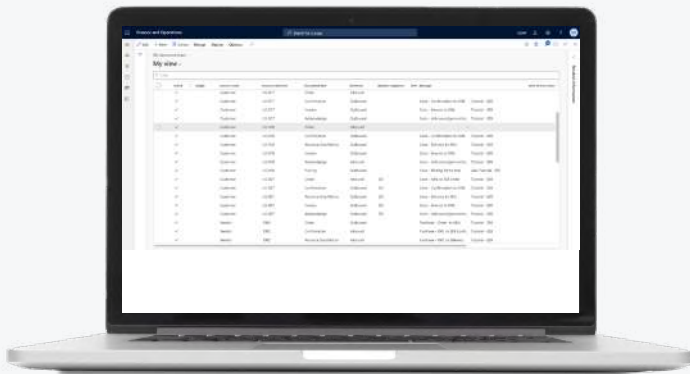
Set up comparison rules on data content to prevent duplicate records from being entered in the application.



## Periodic governance checks

Setup periodic quality assessments to see if there are records in the application which do not meet the validation rules. This can be used to comply with new or changed setup or when the cleansing and validation rules are not directly enforced during data entry.

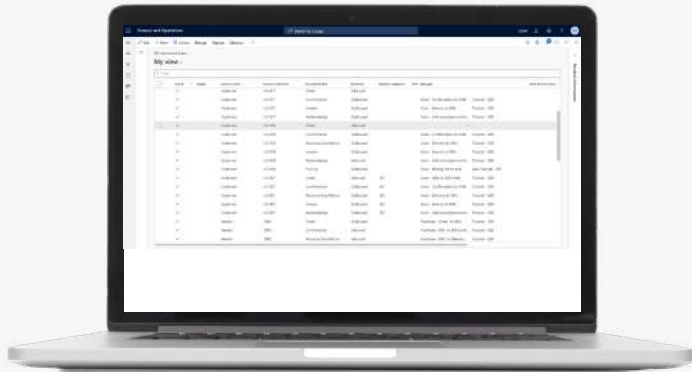




## User interaction

Monitor data entry by users according to data quality policies. In case of an error, users get a clear message and can focus on correcting the error.

# Key Features – Data Entry Workflow

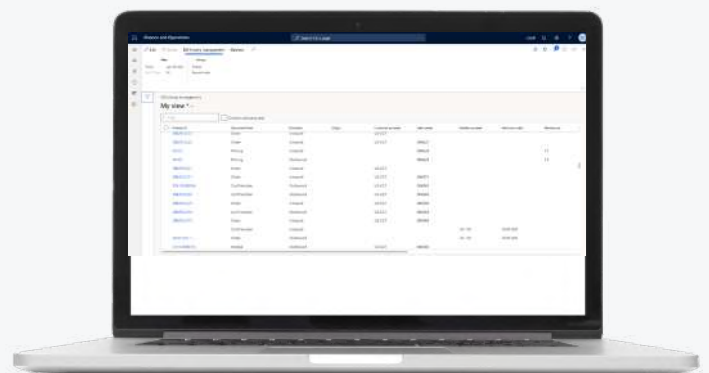


## Modern form-recording tool

Enable non-technical users to easily create data entry workflow templates by selecting fields from the standard application forms, without any need for in-depth technical knowledge.

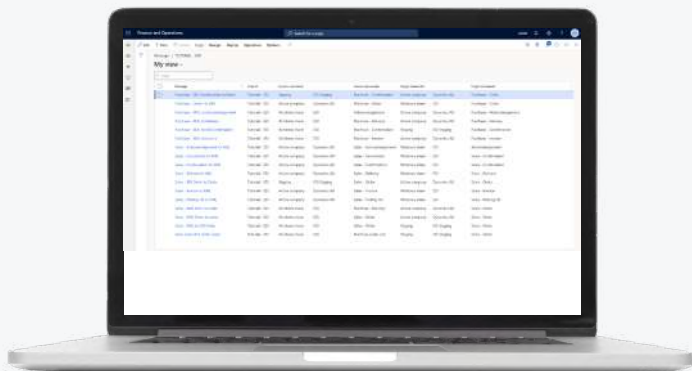
## Data entry experience

The business user will have an easy-to-understand, compact data entry form instead of standard master data forms which could be overwhelming to end users. They receive notifications on assigned tasks and will have the option to complete a step at once or to complete it in multiple iterations.



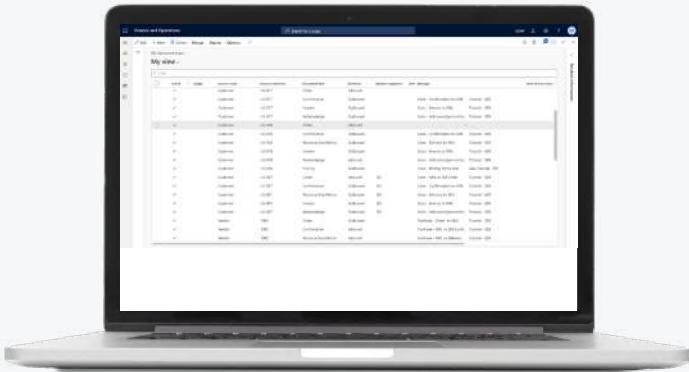
## Data entry workflow template designer

With the help of the designer, you can define various steps with the required fields, set up user assignments, set time limits, and manage the approval process. With the dynamic integration setup on standard master data forms, you can also determine which templates can be started from existing forms in the application.



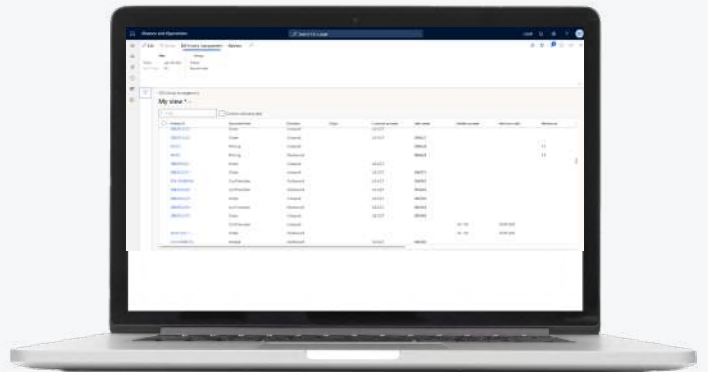
## Approval steps

An approver will be able to validate the most important fields, and where required, request for a change. Other possible actions are approval, rejection, or delegating to another user. Any data entry provided by users will be logged with a timestamp and template step details for audit purposes.



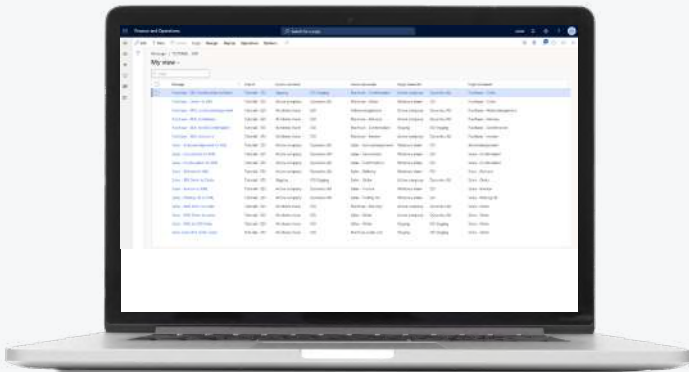
## Step assignments

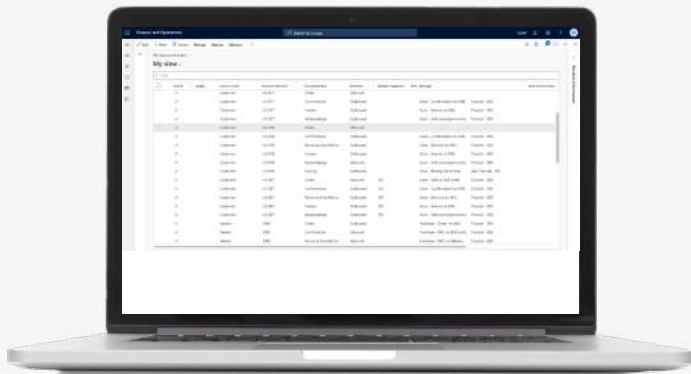
Set up assignments for users and legal entities on each workflow step. Before distributing data, the workflow will ensure that the steps are completed. When another legal entity receives a new master record, a data entry workflow instance can be started to complete data, specific to that company.



## Step notifications

The standard alert functionality can be used to notify users of new step assignments and tasks that are due based on the time limits.



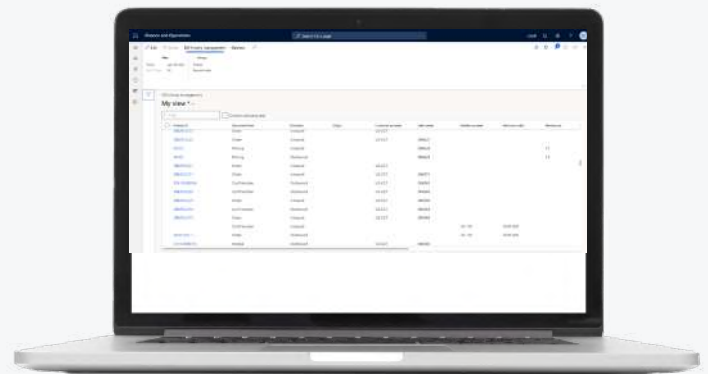


## Copy data entry workflow templates

There might be a requirement to have multiple templates for the same entity with some slight changes. For that purpose, you can copy existing data entry workflow templates which offer easy and quick maintenance.

## Version management

The workflow templates support version management, and intermediate changes can be restored with change sets. Templates and their versions can also be deployed to other environments with the help of export and import functionality as well as with the synchronization of change sets..





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