# Cloud Test Data Management

Benefits

- Prevent compromising test efforts with poor quality data
- Restrict the use of production sensitive data (customer names, contact information, PCI, or PHI data) by anyone, external or internal, who does not need access to the data to do their job
- Avoid using Salesforce's Full Sandbox as a development, QA, training, and pre-production environment due to the lack of useful data in Dev Pro and Dev Sandboxes

Optimize Salesforce Testing Efforts Through Better Sandbox Management

The widespread adoption of cloud-based applications has been driven in large part by the need for organizations to reduce IT administrative costs. Because of the ability to add customizations to Salesforce, however, companies are spending an equal amount—or more—on testing and development. Preparing an empty Salesforce sandbox for release, alone, can take a technical resource up to three weeks.

Informatica's Cloud Test Data Management (TDM), with its wizard-based interface, saves companies time and money by eliminating the complexities of populating Salesforce sandboxes with the right subset of related data in order to completely secure sensitive information.
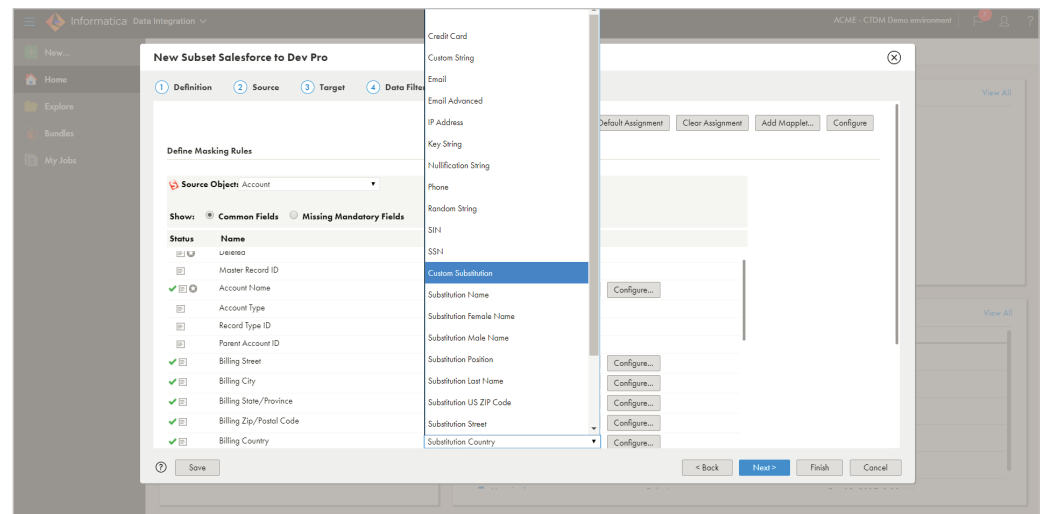
A simple wizard lets Salesforce administrators and QA engineers mask data and copy subsets of test data sets.
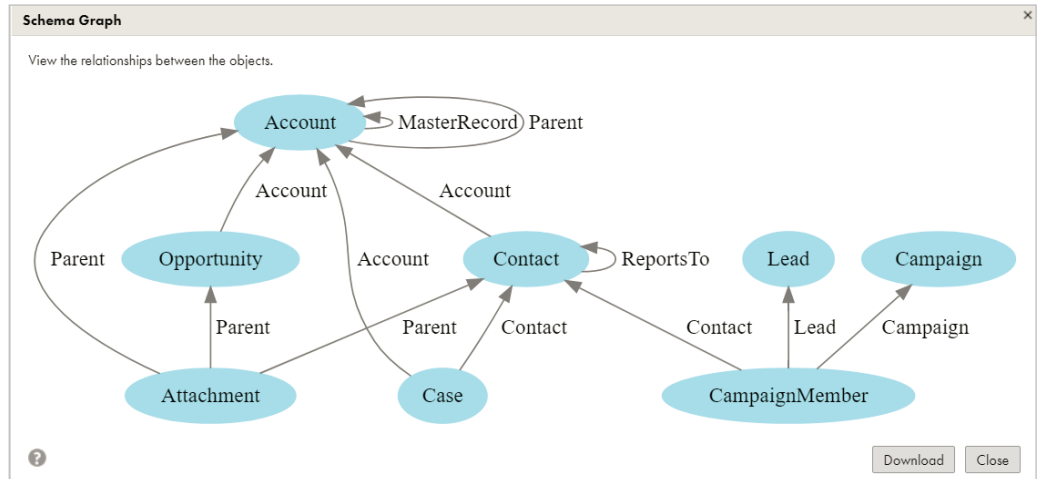
Define your test data set and visually check the relationships among objects and how they will be reconciled in the target Sandbox.

Get the Most Value Out of Your Sandboxes

Maximizing the return of your Salesforce sandboxes requires the complex task of subsetting— or copying— a targeted sample of data to test from production to Dev and Dev Pro Sandboxes. Without subsetting, sandbox users struggle to have enough data sets with meaningful data and are left questioning the viability of their test data. Most subsetting tools simply are not up to the task. Free data loaders require users to understand Salesforce's SOQL language and reconcile relationships among objects manually by manipulating CSV files in Excel.
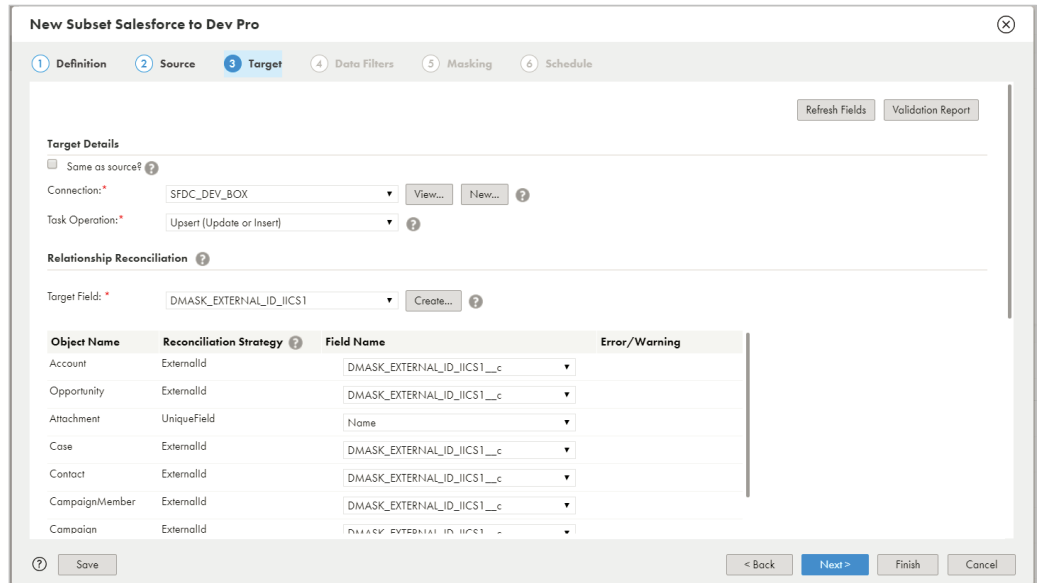
Cloud TDM puts the power of provisioning reliable test data in your hands. The intuitive wizard offers up pre-built templates with just a few clicks. It provides data filtering to walk you through the entire process of copying related subsets of data between Production or Full Sandbox to Dev, Dev Pro, and even Partial Sandboxes, while maintaining the referential integrity of the data sets.

Preserve Data Consistency Throughout the Provisioning Process

Your tests are only as reliable as the data being run against them. Effective testing—and release management—requires test data that preserves the relationships among object records in Salesforce. Previously, that meant populating sandboxes manually one object at a time through spreadsheets. With Cloud TDM, you can now simply choose a single object to include and relate the associated standard and custom objects in your sandbox. The result is a test environment that mirrors the richness and referential integrity of production, without the large storage requirement.

Protect the Data Privacy of Your Customers and Ensure Compliance

Copying personally identifiable and other sensitive information from production to less secure sandboxes can expose your organization to unwanted risk, and the possibility of significant fines for non-compliance with regulations such as HIPAA, GLBA, PCI DSS, and the EU Data Protection Directive. Cloud TDM eliminates these risks by providing out-of-the-box, configurable masking algorithms to anonymize common sensitive data elements.

New Subset Salesforce to Dev Pro

① Definition　② Source　③ Target　④ Data Filters　⑤ Masking　⑥ Schedule

Refresh Fields　Validation Report

Target Details

☐ Same as source?

Connection:* SFDC_DEV_BOX View... New...

Task Operation:* Upsert (Update or Insert)

Relationship Reconciliation

Target Field: * DMASK_EXTERNAL_ID_IICS1 Create...

Object Name	Reconciliation Strategy	Field Name	Error/Warning
Account	ExternalId	DMASK_EXTERNAL_ID_IICS1__c	
Opportunity	ExternalId	DMASK_EXTERNAL_ID_IICS1__c	
Attachment	UniqueField	Name	
Case	ExternalId	DMASK_EXTERNAL_ID_IICS1__c	
Contact	ExternalId	DMASK_EXTERNAL_ID_IICS1__c	
CampaignMember	ExternalId	DMASK_EXTERNAL_ID_IICS1__c	
Campaign	ExternalId	DMASK_EXTERNAL_ID_IICS1__c	

Save < Back ​ Next > Finish Cancel

Cloud Test Data Management makes reconciliation of relationships simple, allowing the use of External-IDs, Unique indexes, and Lookups as keys to reconcile records of related objects.

With its intelligent pre-built masking techniques, data appears real and preserves patterns found in production. Now you can be assured that your Salesforce sandboxes are secure and compliant with corporate, geographic, and industry-specific data privacy regulations.

Full Sandboxes are obvious targets. Every 28 days, Salesforce lets customers refresh the Full Sandbox with a clone of production data. It doesn't take long for any resource performing tests or using the data to cascade one of the company's most precious asset—customer and sales data—to downstream systems connected to Salesforce.

Cloud TDM can be integrated with the release cycle of a Full Sandbox or Partial Sandbox to general R&D resources requiring access to it by masking sensitive data before the environment is released. This process guarantees that no sensitive data will get exposed to users and to other downstream systems being fed by the same environment.

Highly Customizable to Fit Within Salesforce's Constraints
A solution that is reading and writing data to Salesforce goes through the same communication channel that Salesforce makes available to all customers and partners—their API. Cloud TDM communicates with Salesforce via a secure communication channel and can use Standard API or Bulk API. Informatica optimizes the masking and subset engine to minimize the number of API calls.

In addition, Cloud TDM can also:

• Use primary key chunking to read a large amount of data.

• Disable active triggers and validations of a target object before loading the data and activating them back after load finishes.

• Estimate the size of a test data set before loading the data in target, since Sandboxes has a maximum size imposed by Salesforce.

Advance Salesforce Options

Disable Triggers and Rules:	☐
Use the Bulk API:	☐
Enable Primary Key Chunking:	○ Yes ● No
Primary Key Chunking Size:	100000

Enable primary key chunking and use the bulk API to configure tasks to handle large volumes of source data. Accelerate the data loading process by disabling active triggers and rules in target objects and re-activating them after loading is complete.

To learn more, visit Informatica's Cloud Test Data Management page.

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