

Welcome to your Reltio Test Drive!

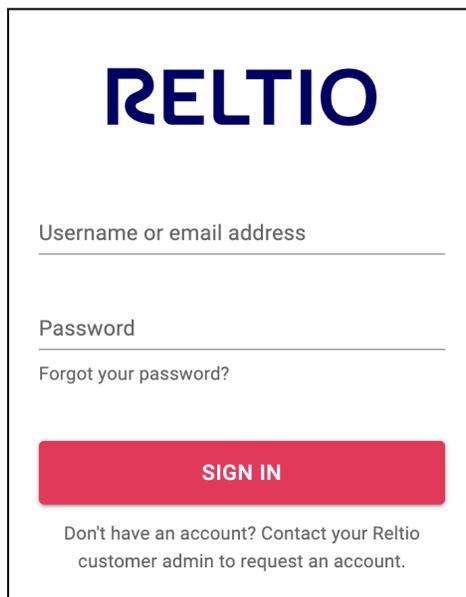
Below you will find some introductory use cases to get you started with your Reltio Test Drive experience. During the next 30 days, you will engage with a Reltio subject matter expert who will answer all your questions and give you the confidence that Reltio can address all your data management requirements. In the meantime, feel free to use this document to familiarize yourself with navigating Reltio. Below are the Test Drive use cases this document will address:

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Reltio Test Drive

Welcome: Logging into your Test Drive tenant

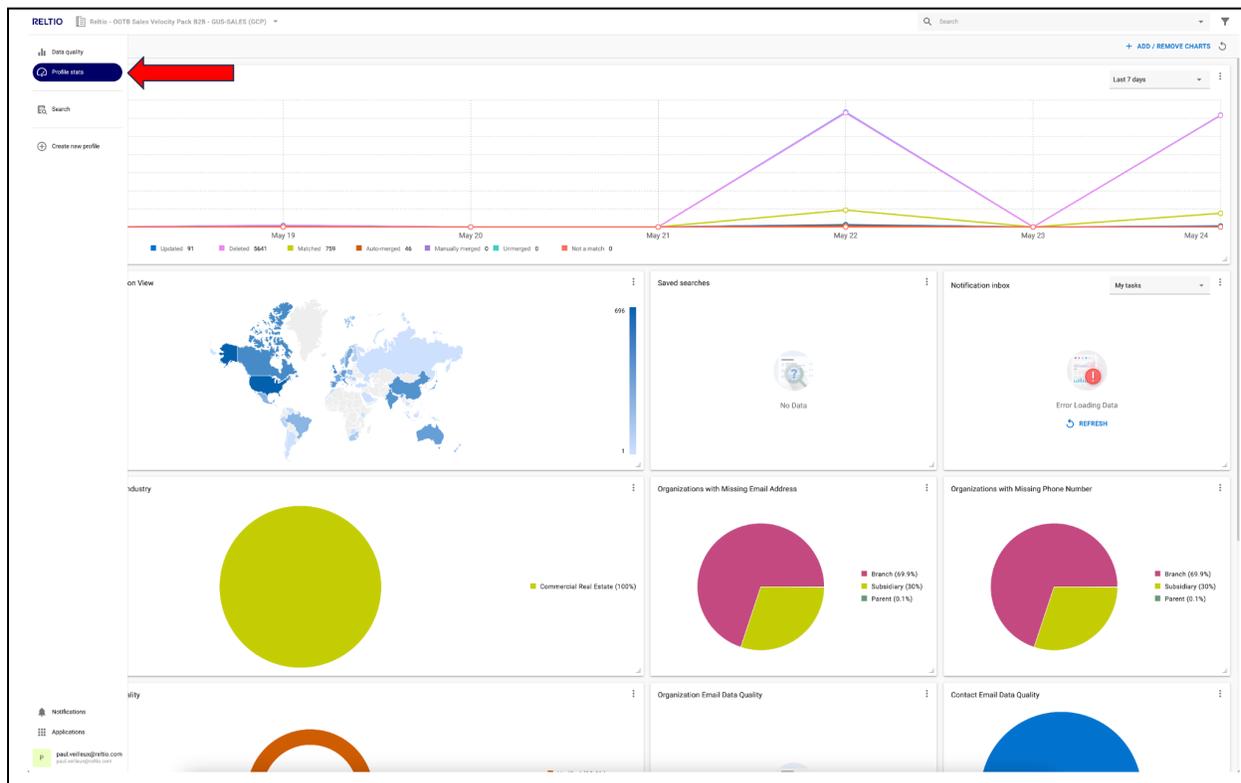
User Action: Log into your Reltio Test Drive tenant using your provided username and password from the email you received. If you have forgotten your password, Click on the “**Forgot your password**” link to have an email sent to reset your password. For more details on getting started with Reltio, please visit the [Reltio Documentation Portal](#).



The image shows a login form for Reltio. At the top, the word "RELTIO" is displayed in a large, bold, blue font. Below the logo, there are two input fields: "Username or email address" and "Password". Under the password field, there is a link that says "Forgot your password?". A prominent red button with the text "SIGN IN" in white is located below the input fields. At the bottom of the form, there is a line of text: "Don't have an account? Contact your Reltio customer admin to request an account."

Use Case 1: Dashboard Profile Statistics

User Action: Click on the **Dashboard Profile Stats** icon (see screenshot below with red arrow).



You can analyze your profile statistics using the Dashboard UI. Learn how to view, understand and analyze your data using configurable charts, maps, and graphs using the Dashboard UI. Each Dashboard facet is interactive, meaning you can click on a pie chart to drill into those particular profiles (e.g., “Partially Verified” addresses in the “Address Data Quality” Dashboard facet).

More details can be found on the [Reltio Documentation Portal](#).

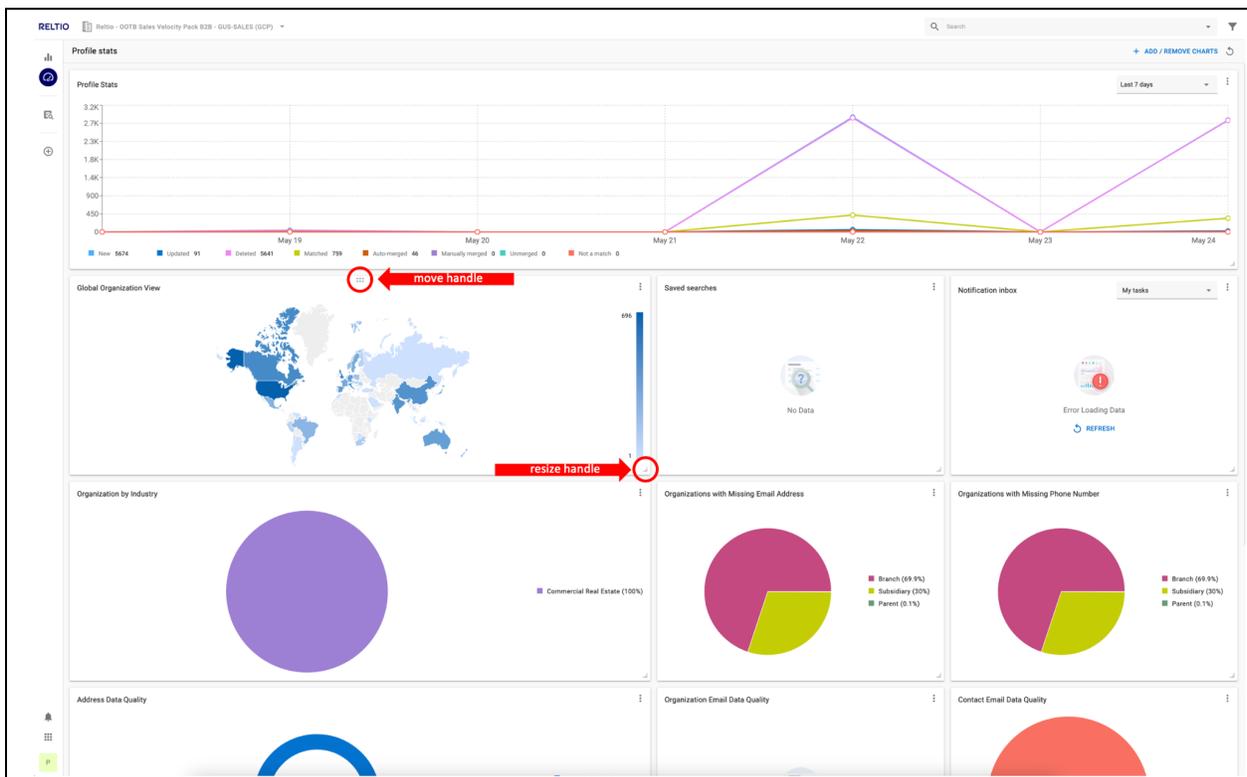
Use Case 1: Dashboard Profile Statistics

User Action: Personalize the Dashboard layout to your liking by clicking-and-dragging the UI facets to wherever you like on the Dashboard page.

You can **customize** the display of the charts on your dashboard by using these options:

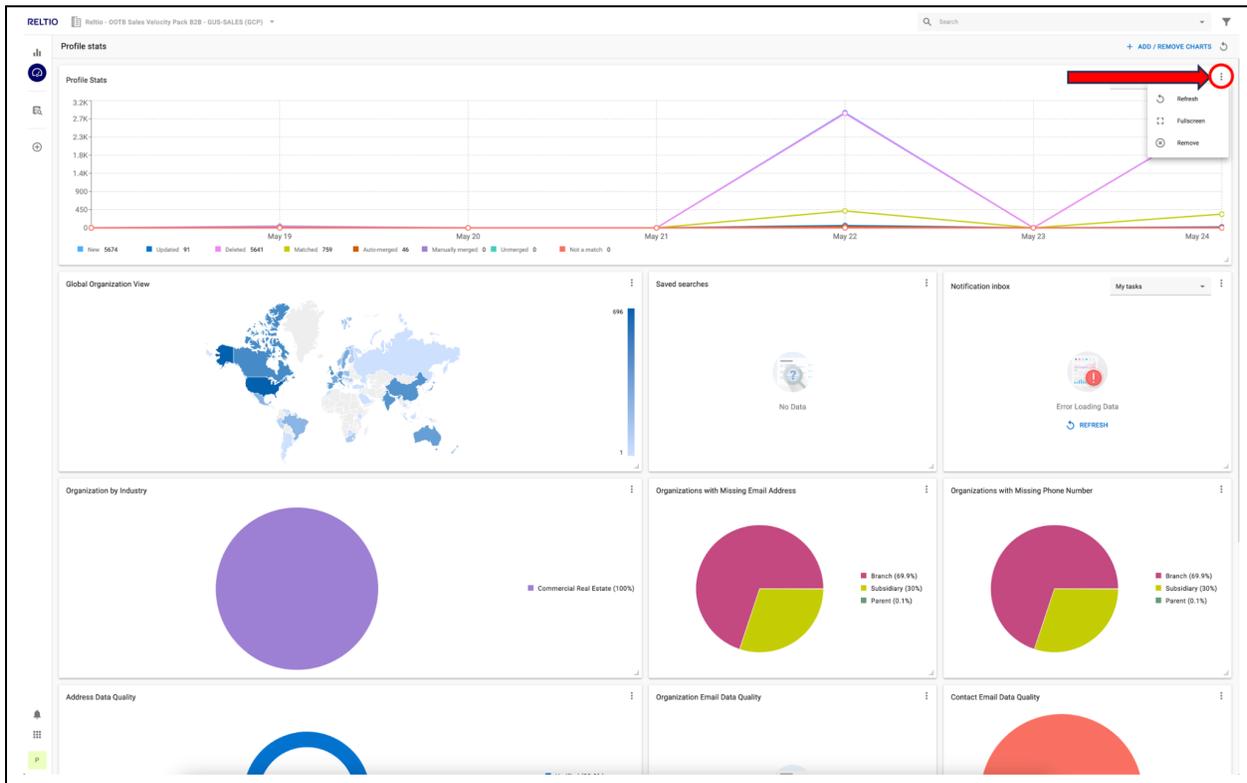
- **Reorganize** the display of charts by dragging and dropping them to other locations on the Dashboard (red circle top-center facet “move handle”)
- **Resize** the chart by positioning the pointer on the lower-right corner (red circle “resize handle” in the screenshot below) and dragging the corner to enlarge or reduce the size.

More details can be found on the [Reltio Documentation Portal](#).



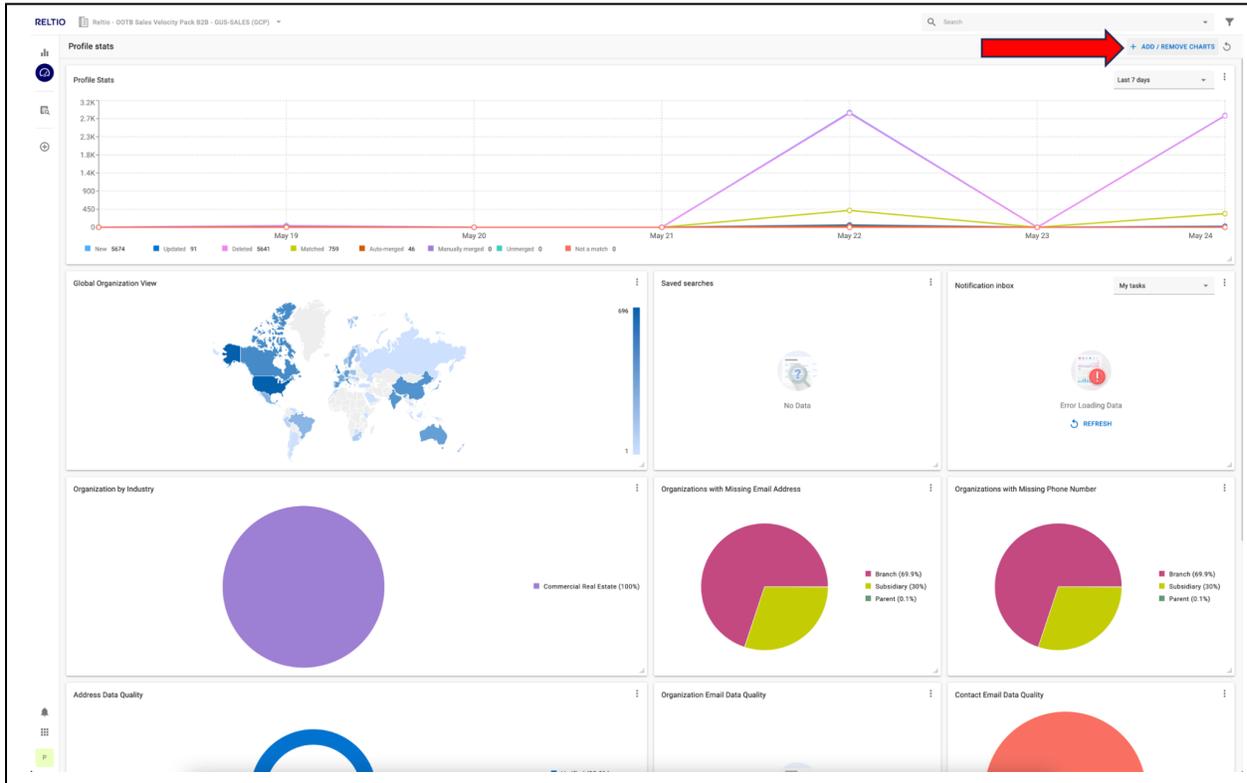
Use Case 1: Dashboard Profile Statistics

User Action: Click on the **overflow icon** (red circle in the screenshot below) to see more chart actions you can perform on that specific chart.



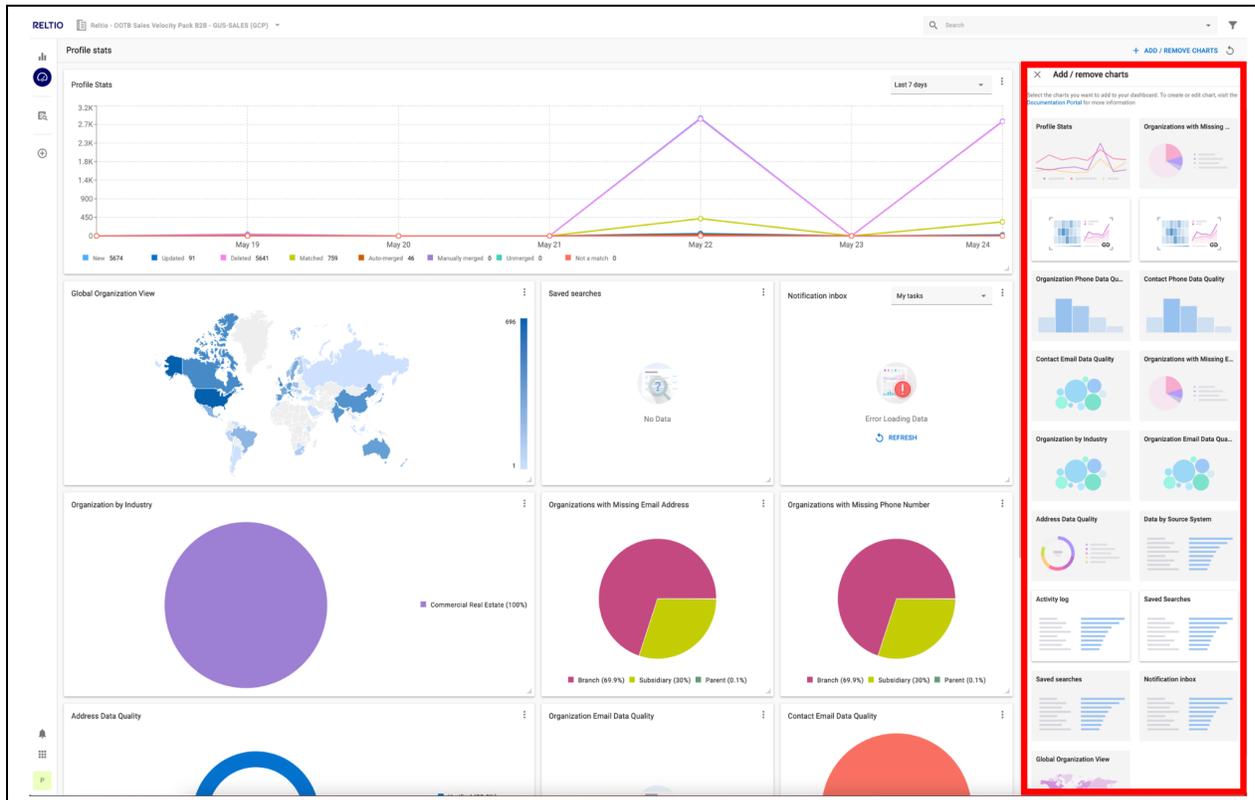
Use Case 1: Dashboard Profile Statistics

User Action: Click on “+ADD / REMOVE CHARTS” button (red arrow in screenshot below)



Use Case 1: Dashboard Profile Statistics

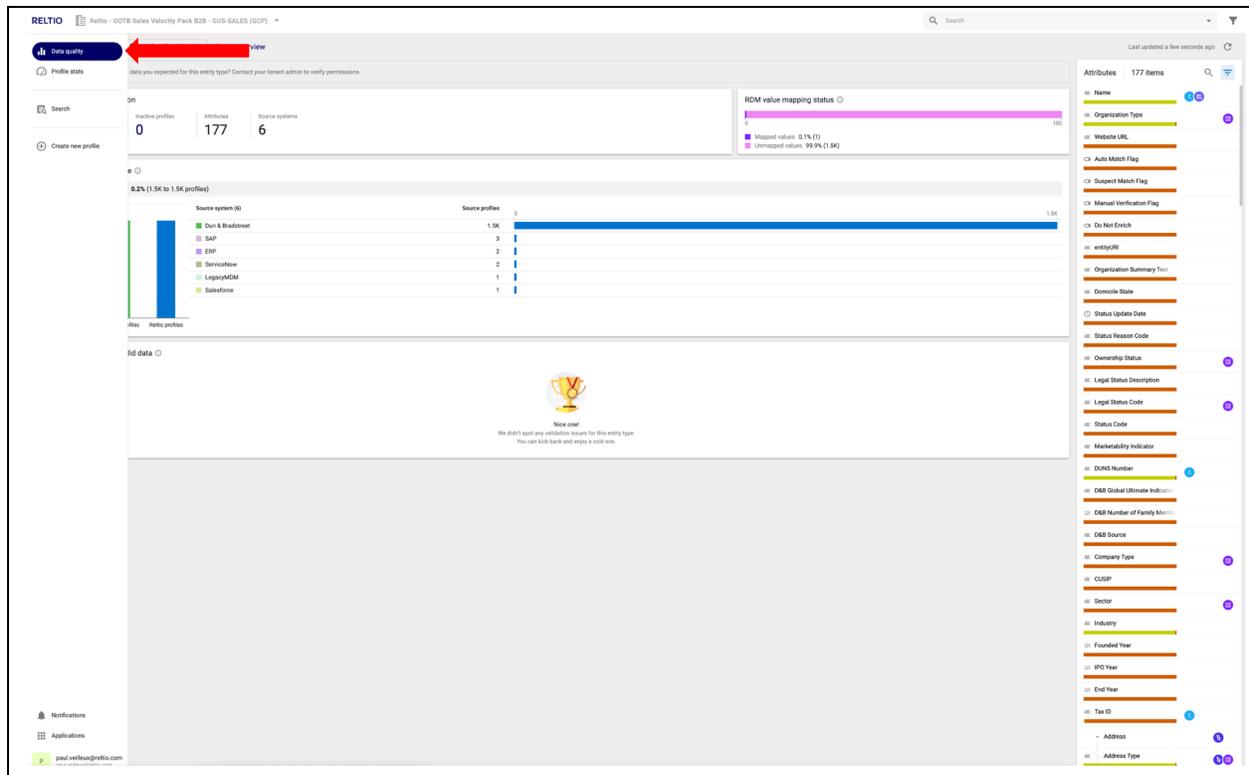
You will see all the pre-configured charts your Reltio Admin created (red box in the screenshot below). You can easily add or remove any available chart from your Dashboard. Every Reltio user can have their own custom Dashboard view.



More details can be found on the [Reltio Documentation Portal](#).

Use Case 2: Data Quality Dashboard

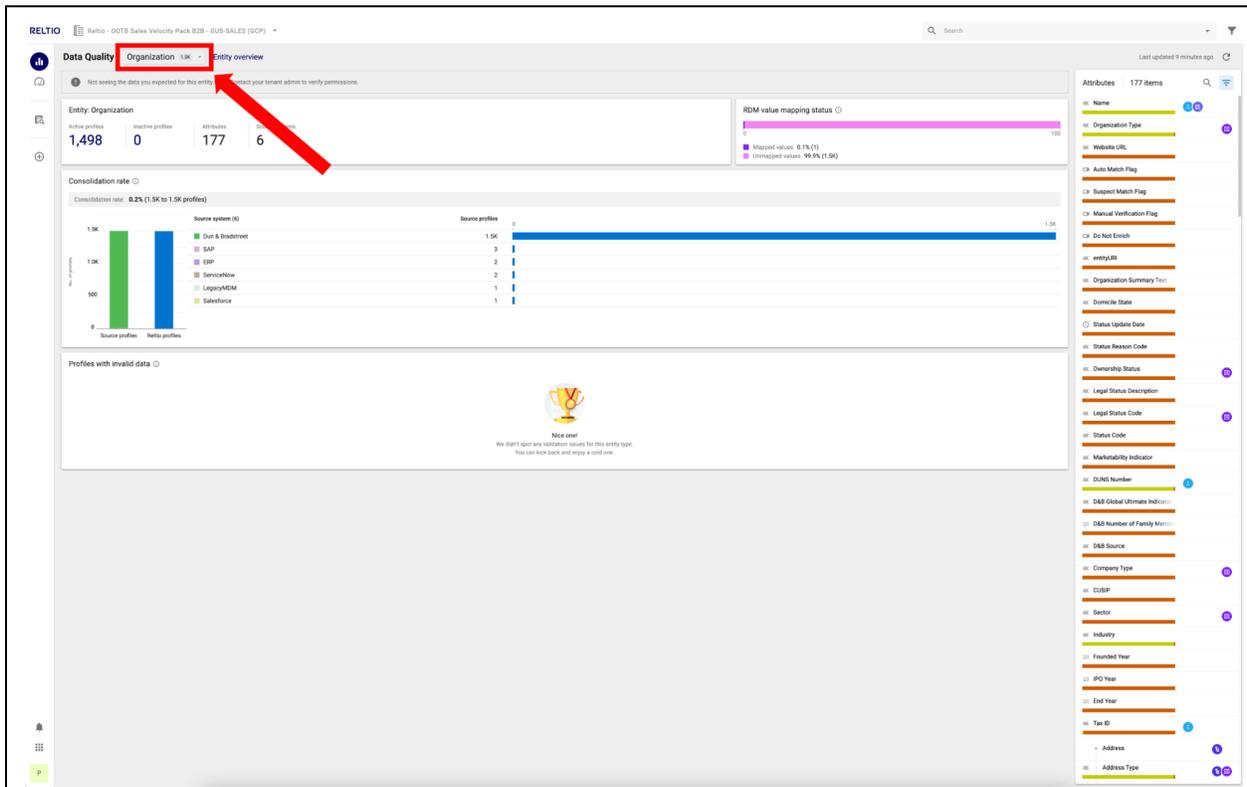
User Action: Click on the **Data Quality** icon (red arrow in the screenshot below).



Use Reltio **Data Quality** to gain insights about the quality of your data. Are you a Business Data Analyst or Data Steward looking to achieve superior data quality? Reltio’s **Real-Time Data Quality (DQ) Management** features offer comprehensive data quality capabilities, including real-time visibility with continuous and automated monitoring.

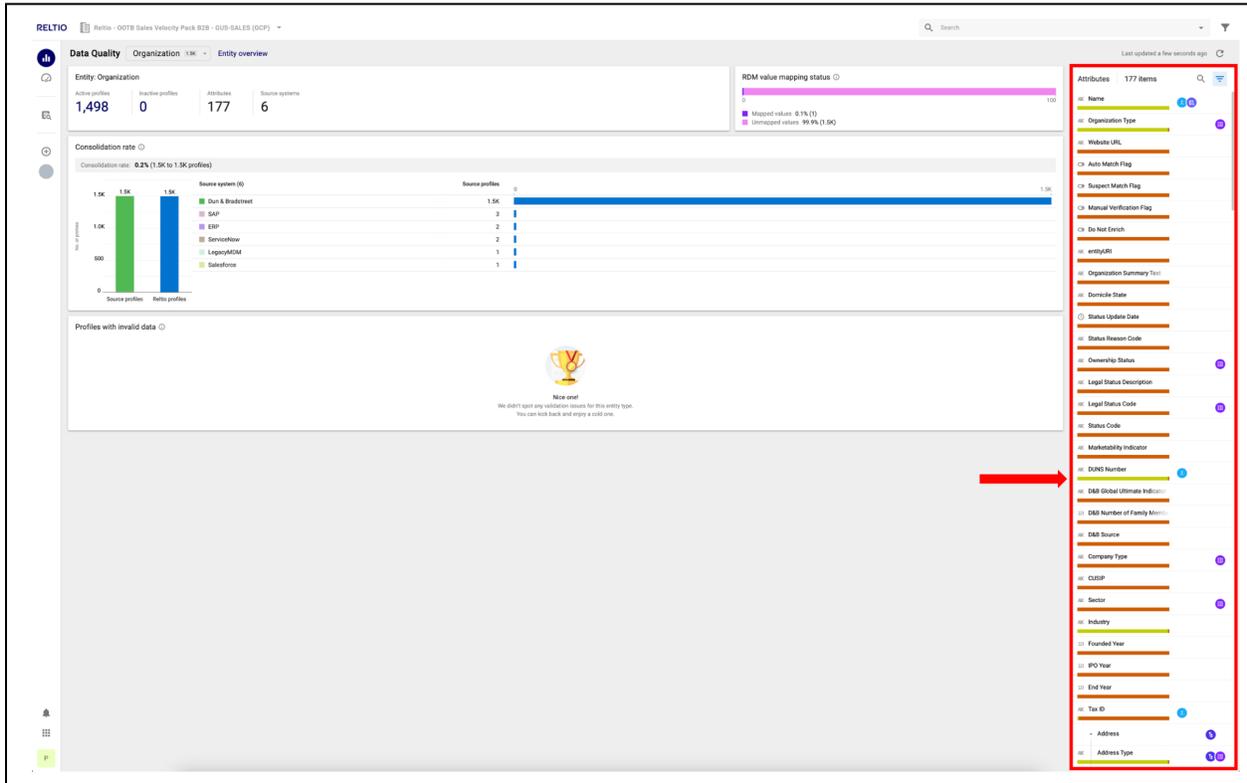
Use Case 2: Data Quality Dashboard

User Action: Click on the drop-down to select the entity you want data quality metrics to display (see the screenshot below with red arrow and red box). For this example, please select “**Organization**”.



Use Case 2: Data Quality Dashboard

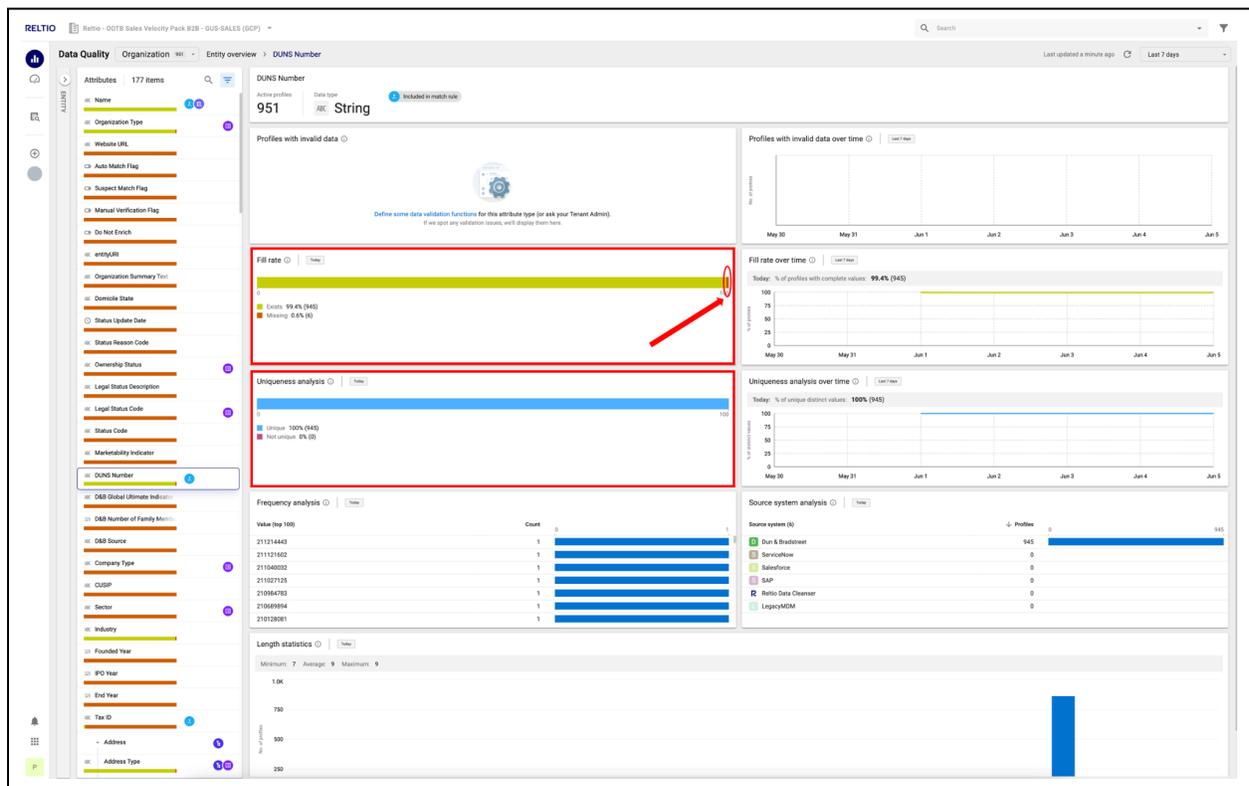
User Action: For our example, please select “**DUNS Number**” from the list of attributes on the right side (red arrow in the screenshot below).



Use Case 2: Data Quality Dashboard

You will see a number of charts displayed, such as **Fill Rate** and **Unique Analysis**, along with time-series charts for profiles with invalid data and uniqueness analysis. You can also change the date range (upper-right corner) for which data is displayed, such as last month, last 6 months, or custom date range.

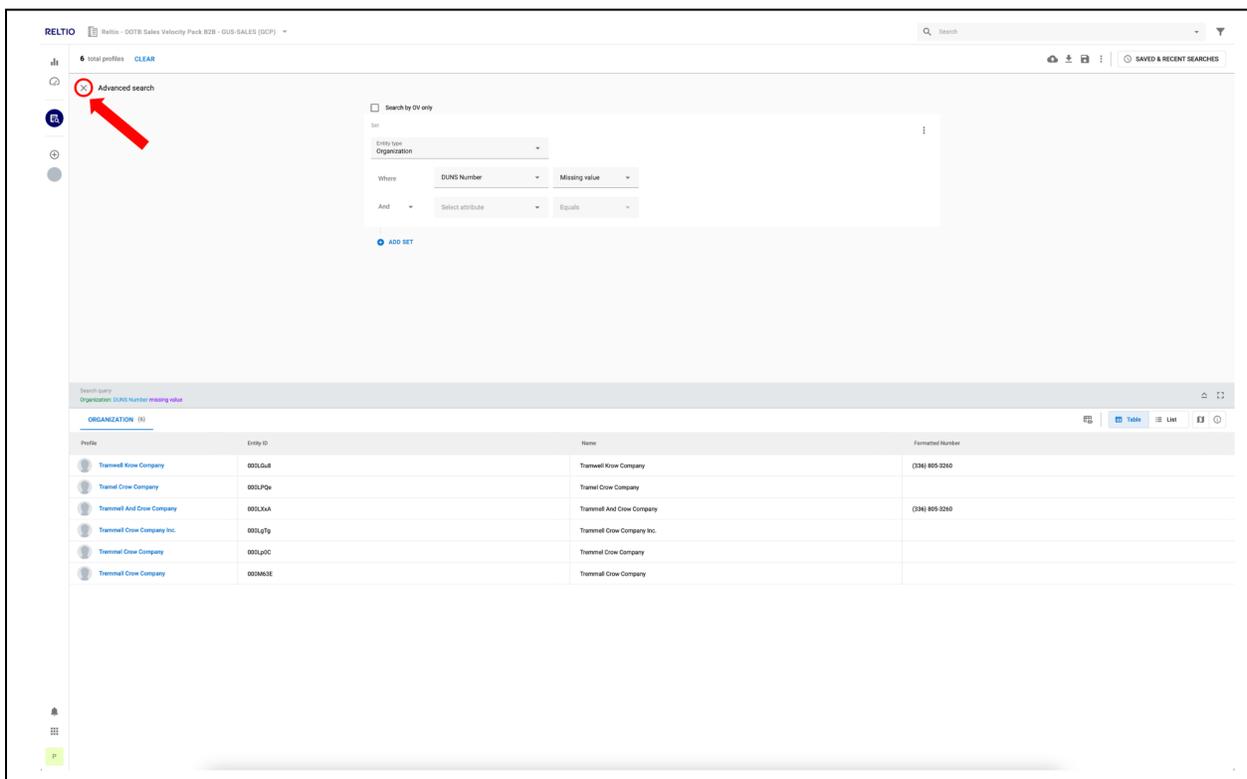
User Action: You can interact with the **Data Quality** charts by clicking on the bar charts. For our example, in the **Fill rate** chart, click on the **“Missing”** data portion of the bar chart (see below screenshot with **red arrow**)



Use Case 2: Data Quality Dashboard

You will get the results in the screenshot below. You can do a Bulk update or data Export from these results.

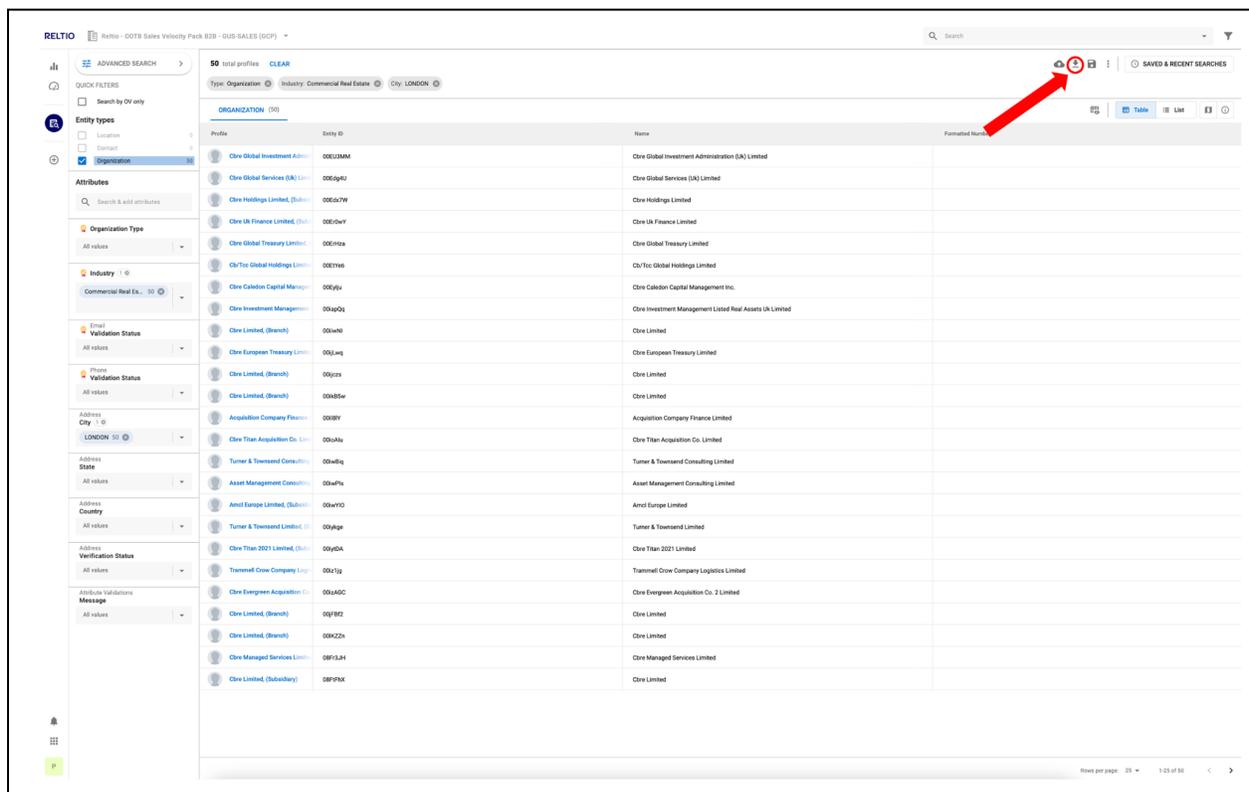
User Action: Exit out of the **Advanced Search** screen by clicking on the “**X**” in the upper-left corner (see **red circle** with **red arrow**) and then click on the “Clear Search” option that is displayed.



Use Case 4: Export

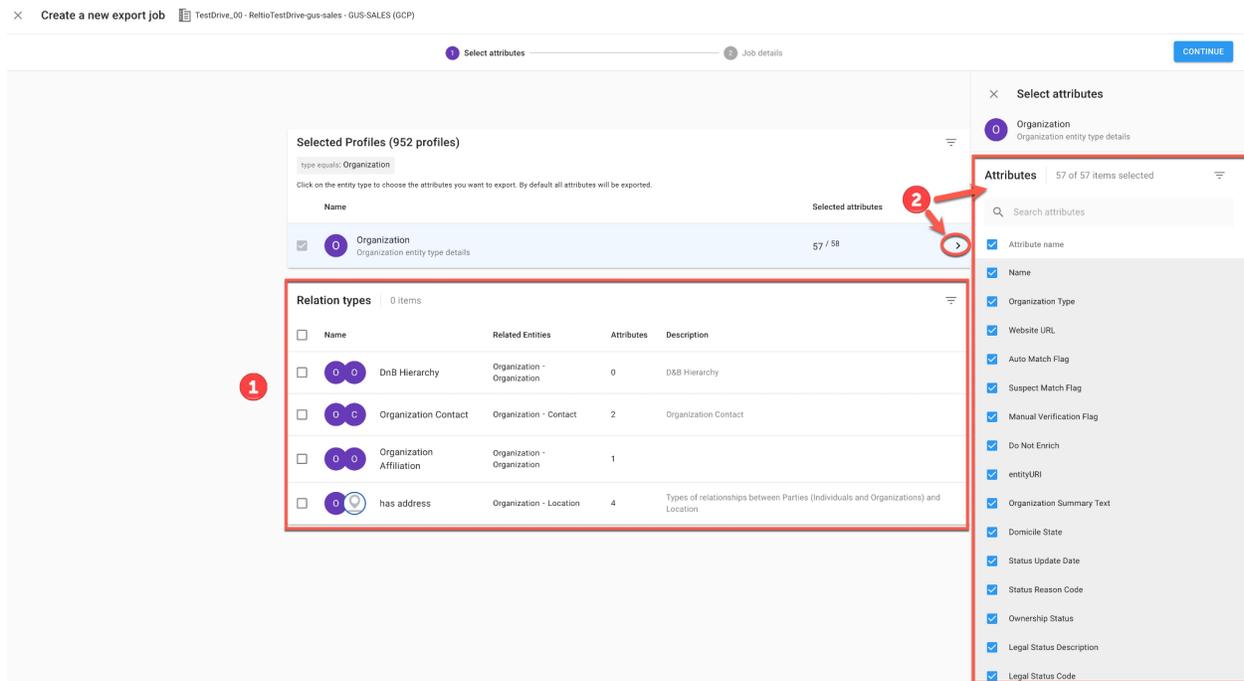
User Action: After searching for a specific set of profile records (from **Use Case 3: Search Experience**), you can export those profiles to a flat file (JSON or CSV).

Click on the **Export** icon to begin the export process (red circle in the screenshot below).



Use Case 4: Export

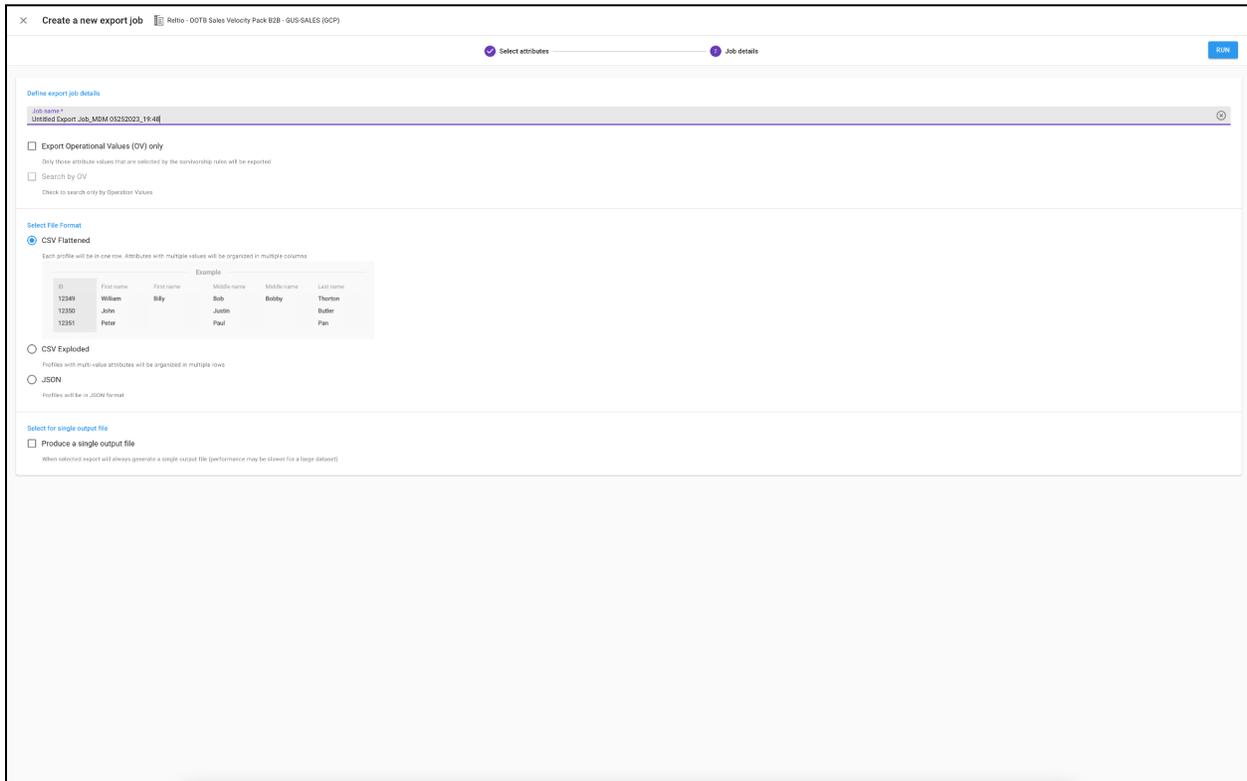
User Action: Select if you also want to export relationships (1), and select which entity attributes (2) you want to export from the right-hand side pick list (you may need to click on the “>” in the red circle to expand the right-hand panel with attributes. Click **continue**.



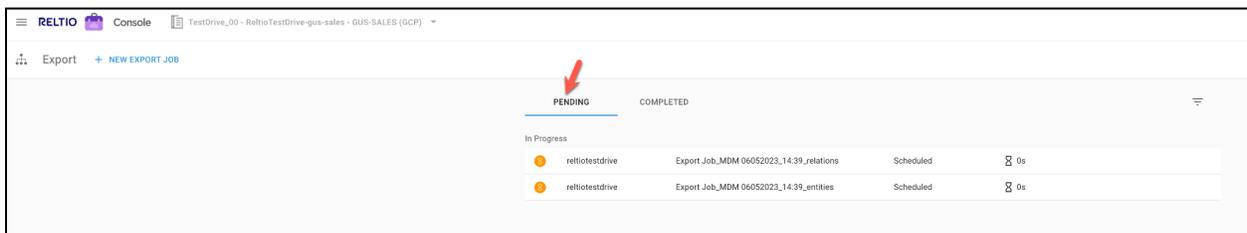
More details can be found on the [Reltio Documentation Portal](#).

Use Case 4: Export

User Action: Give the export job a name (optional), decide if you want Operational Values (OV), (aka “Golden Profile” attributes), and select a file format. Click on **Run**.

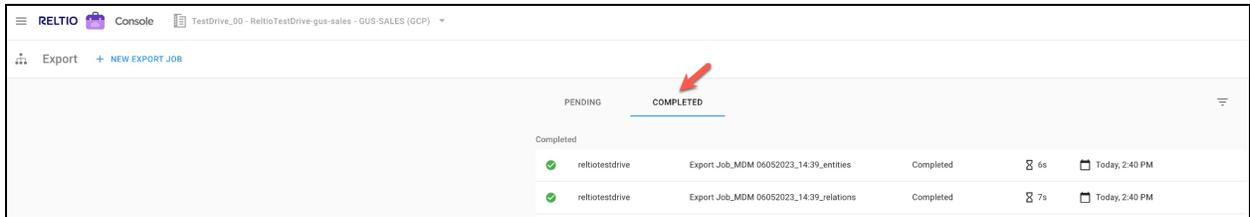


After you click run, you'll be on the Pending job screen. Click "**refresh**" in your browser to update the pending job view.



Use Case 4: Export

Once you no longer see the export jobs in the Pending window, click on the **Completed** tab to see the completed export. You can download the file directly from the Completed Export job UI or you'll also receive an email with a link to download the file.



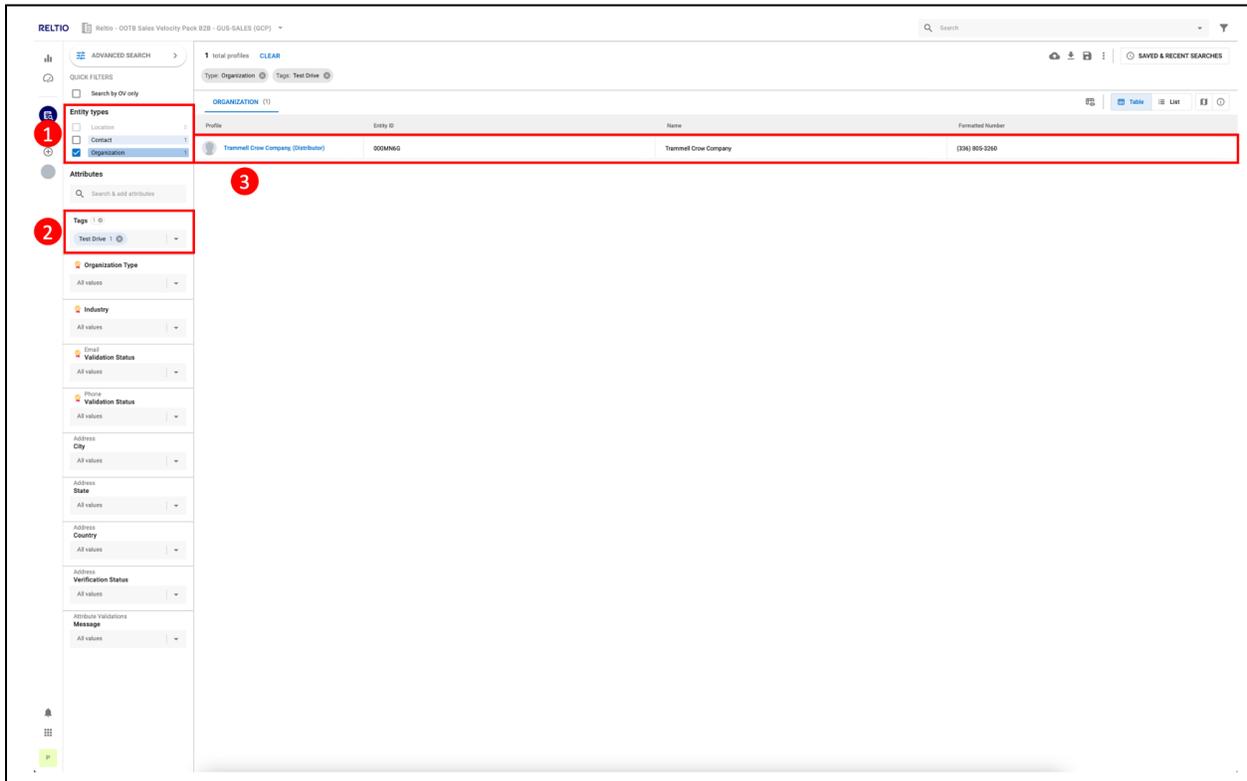
More details can be found on the [Reltio Documentation Portal](#).

Use Case 5: Profile UI

User Action: Go to the [Search UI](#) and

- (1) Using the “**Quick Filters**” search type, select the “**Organization**” entity from **Entity types**
- (2) select “**Test Drive**” from the **Tags** attribute (you can add it by typing “**Tags**” in the **Attributes** field, which is directly below **Entity types** in the screenshot below)

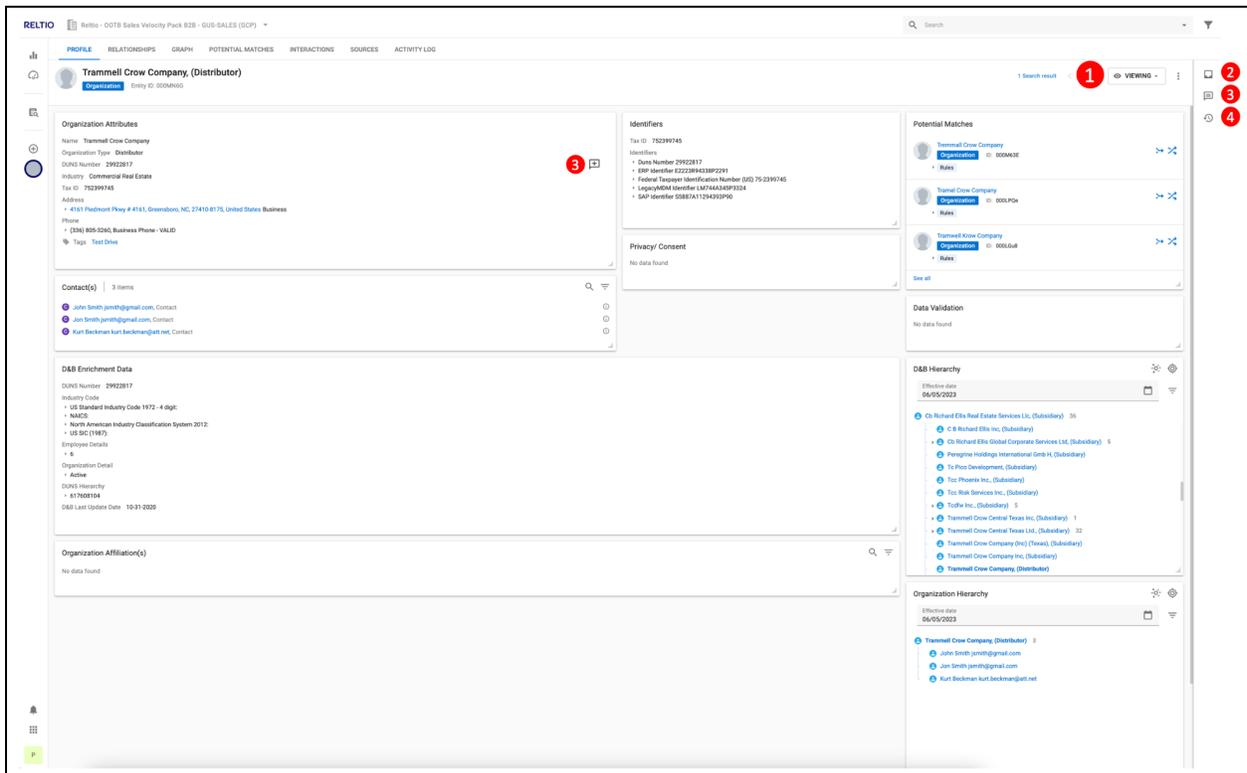
Click on the “**Trammell Crow Company, (Distributor)**” profile record (3) to go to its profile page.



Use Case 5: Profile UI

Each **red circle number** in the screenshot below provides a key to what's described below:

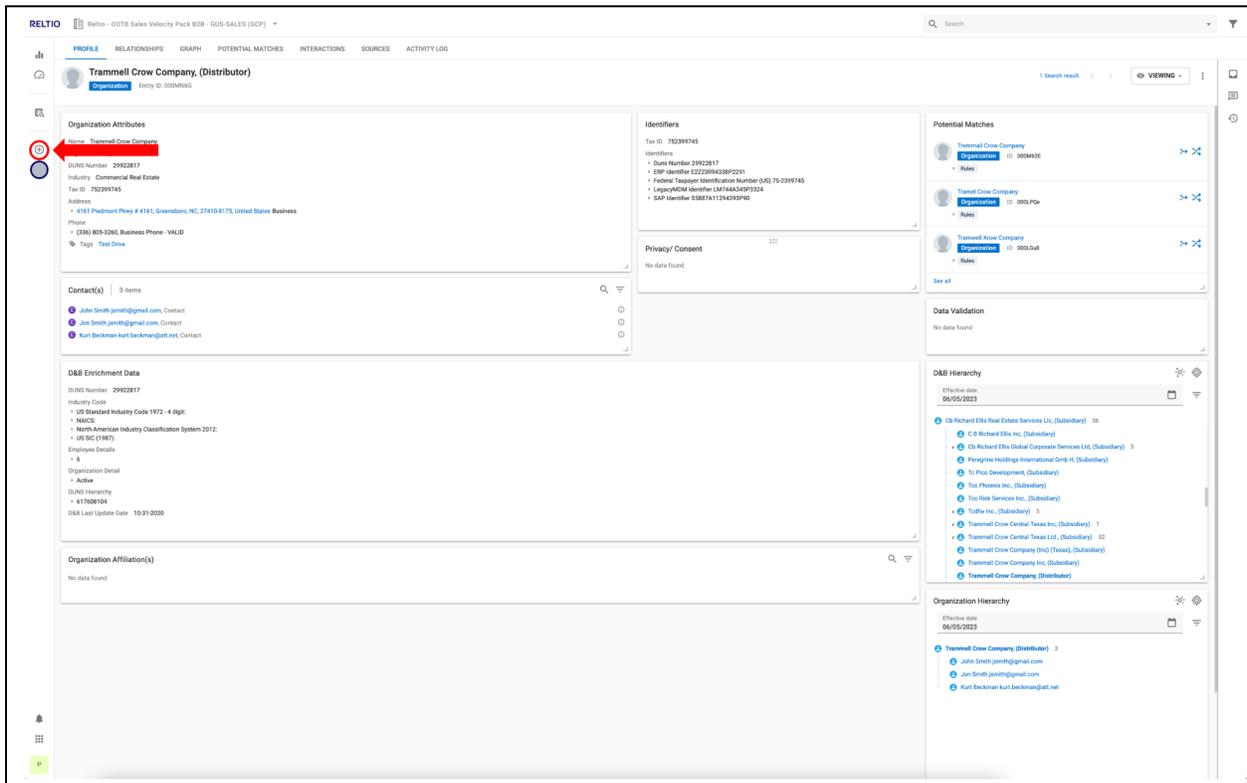
- (1) **Profile mode** - Reltio provides the **Viewing, Editing, Suggesting, or Delete** mode to work on a profile. This is an advanced approach for working with profiles. You can explicitly choose to view a profile, edit the profile (or suggest changes), or delete the profile.
- (2) **Workflow** - collaborate with others for data change requests, deleting a profile, or other custom workflow tasks.
- (3) **Collaboration** - do further collaboration with others by adding comments on any attributes on the profile.
- (4) **History** - view the full history of the profile, including attribute changes, merges, and other events.



More details can be found on the [Reltio Documentation Portal](#).

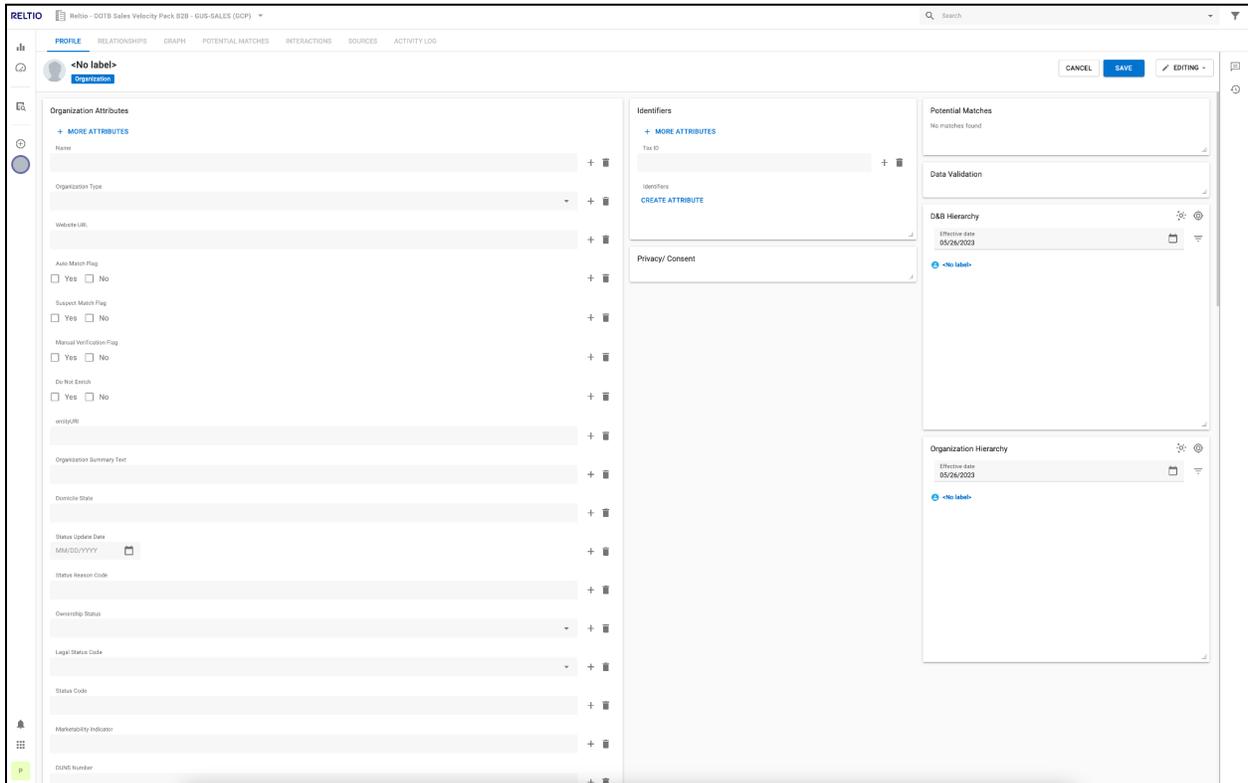
Use Case 5: Profile UI

User Action: You can create profiles directly in the Reltio UI. Click on the icon with the **red circle** (see screenshot below), then select the type of entity you want to create. For our example, select **“Organization”**.



Use Case 5: Profile UI

This will take you to the screenshot below. Like with any form, fill out the fields as needed. If the field is not being displayed, click on “+ **MORE ATTRIBUTES**” to get a full listing of the attributes. You can also search for the attribute you’re looking for. To exit this screen, click “**CANCEL**” in the upper right.

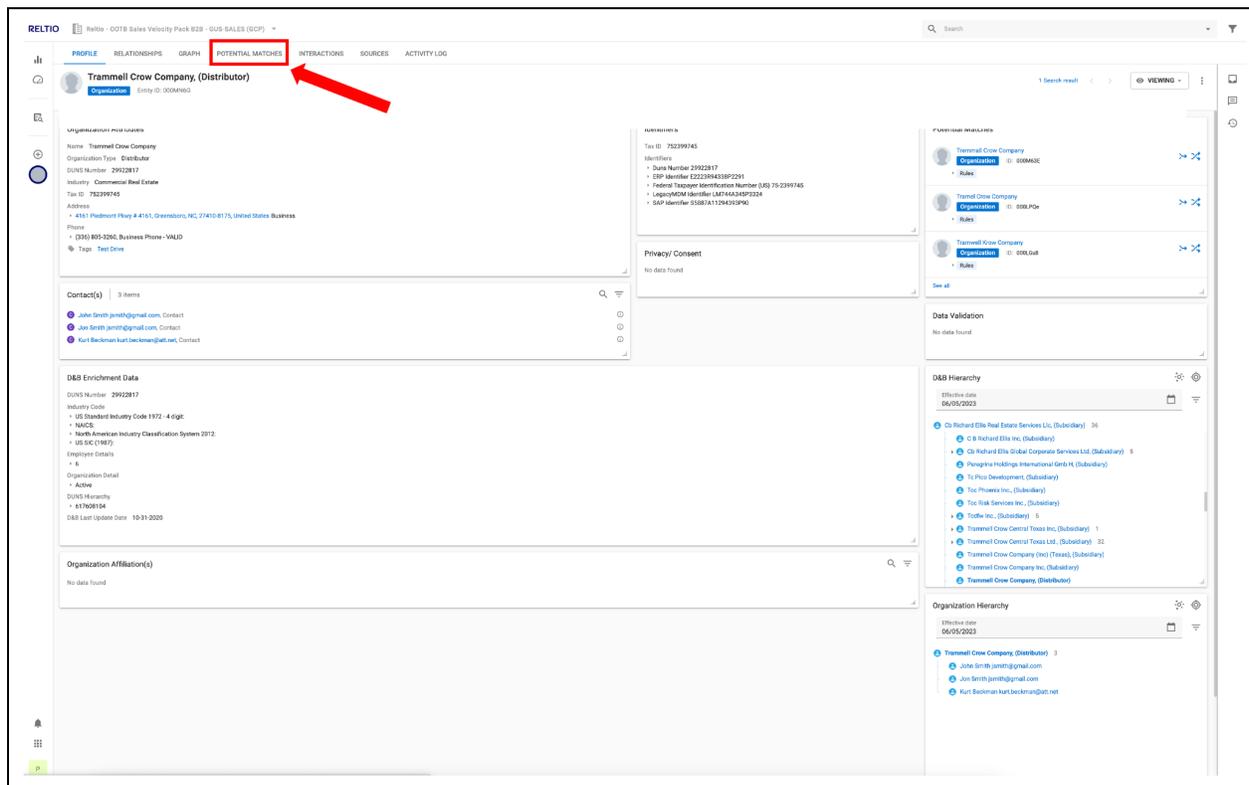


More details can be found on the [Reltio Documentation Portal](#).

Use Case 6: Potential Match Review

User Action: Using the same profile from [Use Case 5: Profile UI](#), click on the **POTENTIAL MATCHES** link (red box and red arrow in the screenshot below) which will take you to the potential matches UI.

Potential matches are considered low-confidence matches which require a data steward to decide if the matches should be merged with the current profile, or not merged (i.e., not a match). Please note that Reltio can automatically merge high-confidence matches with no data steward involvement needed.

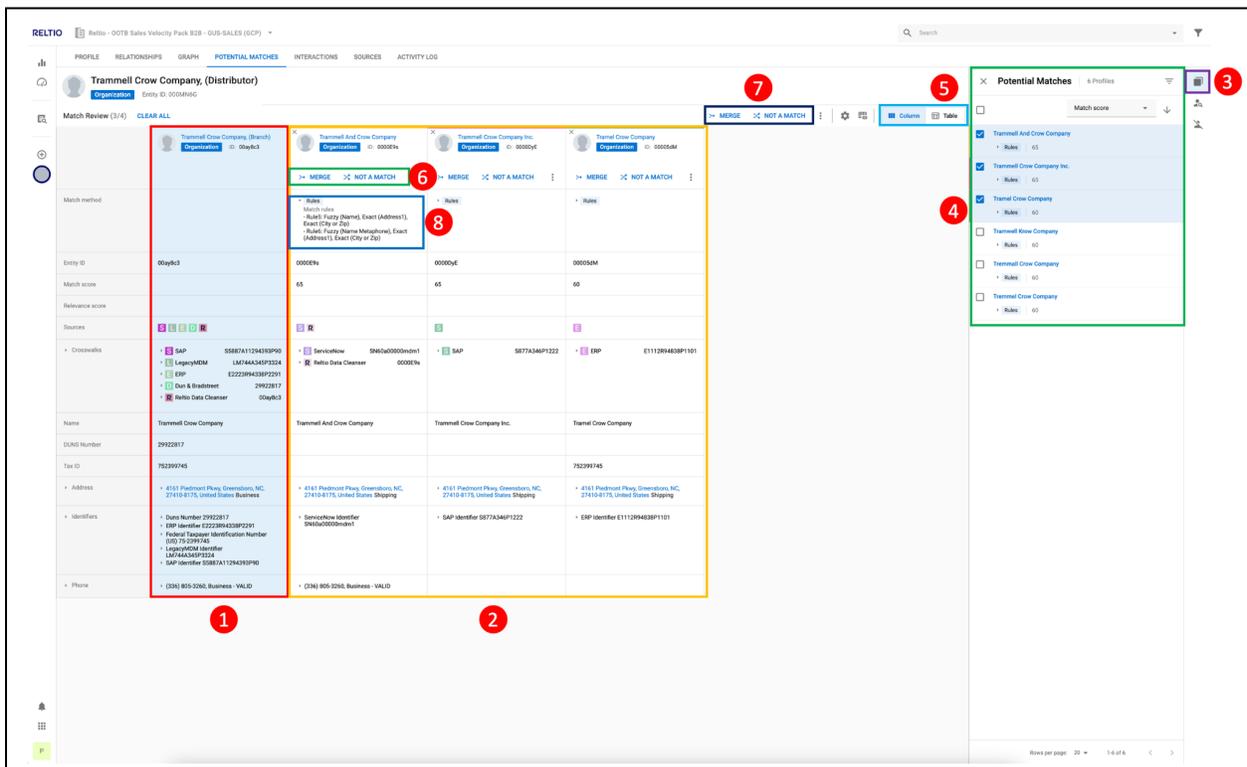


Use Case 6: Potential Match Review

There's a lot happening on this screen, so let's break it down. A data steward will be reviewing the current profile (1) with matched records (2) to make a decision to merge the matched records or not merge.

The screenshot below is referred to as the **Column** view (5), which, by default, shows up to three matched profiles to the current profile (1). If you click on the **Potential Matches** icon (3), you'll see that there are actually six matched profiles (4). The **Column** view cannot show all six records, so the data steward will need to select the **Table** view (5), then select the remaining three profiles (4) to change the layout to a spreadsheet-style format to see all six profiles. In this view, each row represents a separate record (i.e., the first row is the current profile record, and the subsequent rows are the matched profile records).

The data steward can review each individual matched profile and click on “merge” or “not a match” (6) based on reviewing which match rules (8) matched the current profile for that particular matched profile. If the current view is the **Table** view (5), the “merge” and “not a match” icons will appear automatically when hovering over each matched profile name. If the data steward feels that all of the matched profiles are a match, or not a match, they would select the appropriate action in (7).



Use Case 6: Potential Match Review

More details can be found on the [Reltio Documentation Portal](#).

Use Case 7: Survivorship

User Action: Using the same profile from [Use Case 6: Potential Match Review](#), click the **SOURCES** link (red box and red arrow in the screenshot below) to take you to the Sources UI.

The screenshot shows the RELTIO interface with the 'SOURCES' tab highlighted in a red box and a red arrow pointing to it. The main area displays a 'Match Review' table with the following data:

Profile name	Match method	Entity ID	Match score	Relevance score	Sources	Name	DUNS Number	Tax ID	Address	Type	ID	Formatted Number
Trammell Crow Company, (Distributor)		000MMQJ	0			Trammell Crow	29922817	752399745				
Trammell And Crow Company	Rules	000LKH2	65			Trammell And						
Trammell Crow Company Inc.	Rules	000LSU5	65			Trammell Crow						
Tramel Crow Company	Rules	000LO3	60			Tramel Crow Co		752399745				
Trammell Krow Company	Rules	000LGEX	60			Trammell Krow						
Trammell Crow Company	Rules	000MSHd	60			Trammell Crow		752399745				
Trammell Crow Company	Rules	000LKHb	60			Trammell Crow		752399745				

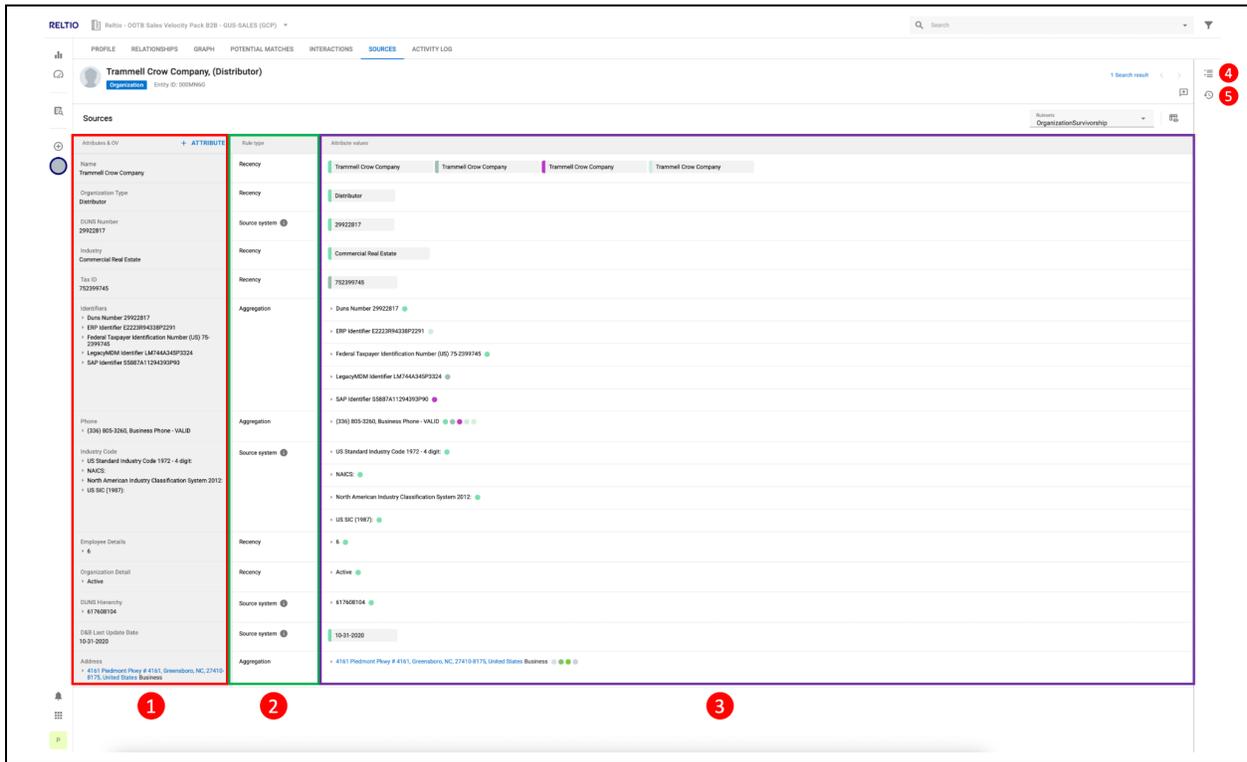
The 'Potential Matches' sidebar on the right shows a list of matches with their respective scores and rules:

- Trammell And Crow Company (Rules: 65)
- Trammell Crow Company Inc. (Rules: 65)
- Tramel Crow Company (Rules: 60)
- Trammell Krow Company (Rules: 60)
- Trammell Crow Company (Rules: 60)
- Trammell Crow Company (Rules: 60)

Use Case 7: Survivorship

Each **red circle number** in the screenshot below provides a key to what's described below:

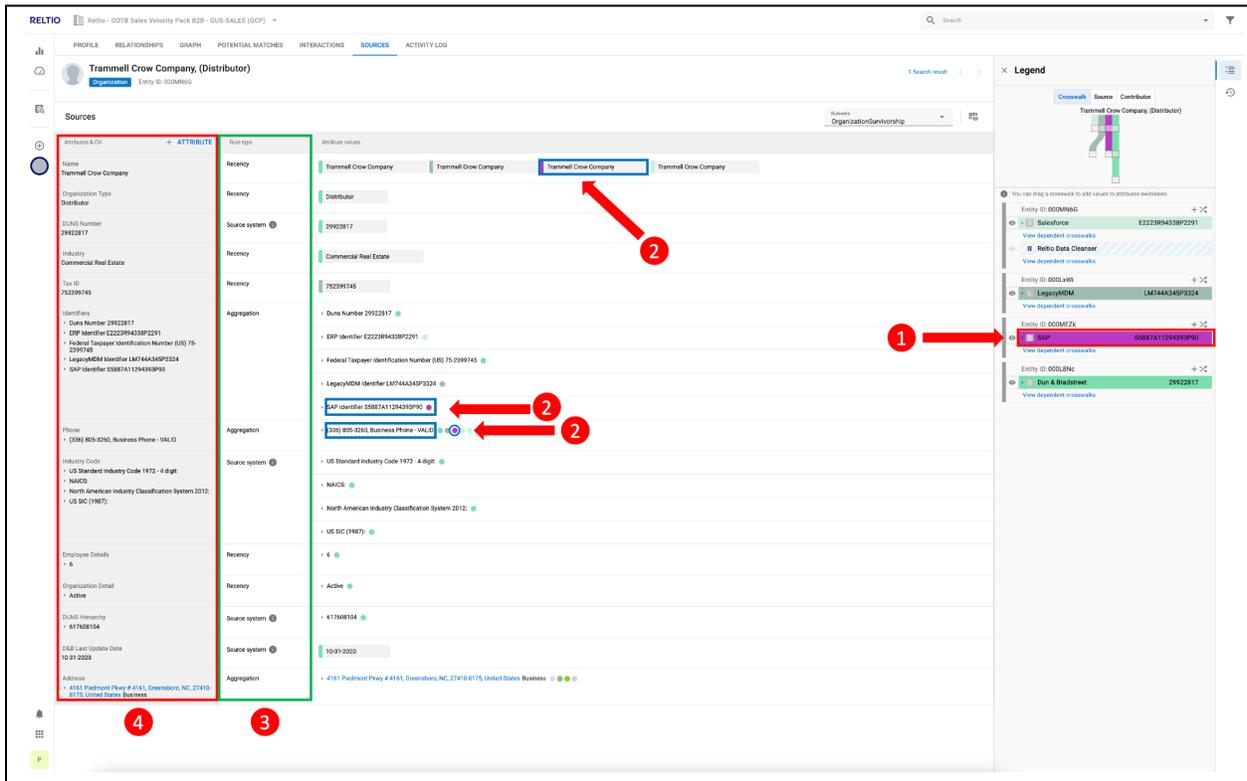
- (1) **Operational Value (OV) and attributes** - You can think of this as the “Golden Profile” record.
- (2) **Rule Type** - the survivorship rule used to determine what survives in (1).
- (3) **Attribute values** - contributing attribute values from the different sources
- (4) **Legend** - a visual representation of how the various sources (color coded) come together to create (1). We'll explore this more shortly.
- (5) **History** - view the full history of the profile, which includes attribute changes, merges, and other events.



Use Case 7: Survivorship

User Action: Click on the **Legend** icon (4) to display a visual presentation of how the source systems came together to create the Operation Value (1) for the **Trammell Crow Company, (Distributor)** profile record.

As you can see from the screenshot below, each source system (e.g., SAP, Salesforce, LeacgyMDM, and Dun & Bradstreet) in the Legend has a unique color. For the **SAP** source (1), which is depicted in purple, **SAP** contributed values for the “Name”, “Identifiers”, and “Phone” attributes (2). A different survivorship rule is applied to each attribute (3) to create the Operational Value (OV), i.e., “Golden Profile” (4).



More details can be found on the [Reltio Documentation Portal](#).

Next Steps in your Test Drive Experience

Thank you for taking the time to work through this use case guide. We hope you found this experience valuable and look forward to working with you. A Reltio representative will contact you shortly to discuss next steps and help you unlock the full potential of your Reltio Test Drive experience!