RELTIO Reltio Test Drive

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

<u>User Action</u>: Log into your Reltio Test Drive tenant using your provided username and password from the email you received. If you have forgotten your password, <u>Click</u> 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 <u>Reltio Documentation</u> <u>Portal</u>.



Use Case 1: Dashboard Profile Statistics

<u>User Action</u>: 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).

Use Case 1: Dashboard Profile Statistics

<u>User Action</u>: 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.



Use Case 1: Dashboard Profile Statistics

<u>User Action</u>: 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

<u>User Action</u>: 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.



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<u>User Action</u>: 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.



<u>User Action</u>: 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**".

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

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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.

<u>User Action</u>: 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)

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

<u>User Action</u>: 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.

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Use Case 3: Search Experience

<u>User Action</u>: Click on the **Search** icon (red arrow in the screenshot below).

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Use Case 3: Search Experience

There are three ways to search in Reltio (see screenshot below):

(1) Google-like search

Start typing and you'll instantly see the results. Try typing "com" and you will see results across all entity types.

(2) Quick Filters search

This is similar to many e-commerce sites like Amazon, allowing you to narrow your search by selecting specific attributes. Try clicking on the location entity type to see only locations.

(3) Advanced search

Allows you to build complex searches not supported by (1) and (2).

(4) Save your favorite searches.

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<u>User Action</u>: 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).

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<u>User Action</u>: 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**.

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<u>User Action</u>: 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**.

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

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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.

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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.



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.



<u>User Action</u>: 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**".

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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.

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Use Case 6: Potential Match Review

<u>User Action</u>: Using the same profile from <u>Use Case 5: Profile UI</u>, 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.

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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 <u>all</u> of the matched profiles are a match, or not a match, they would select the appropriate action in (7).

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Use Case 6: Potential Match Review



Use Case 7: Survivorship

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

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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.

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Use Case 7: Survivorship

<u>User Action</u>: 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).



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!