

Data Sheet

Reltio User Experience

Everything You
Need to Know

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Get an insightful overview of the user-centric features and benefits that make Reltio a game changer in the realm of modern master data management.

Key Terms:



Tenant

An organization's deployment of Reltio. A tenant is connected to all data sources and can be easily accessed via UI or API. It is the combination of the Data Model & UI Model.



Attribute

Key pieces of defining information that are attached to an entity's record. Attributes can be pulled from the data sources that are connected to a tenant.



Entity

A single instance or record of an Entity Type. Includes two types of data, the values for the entity's attributes and a crosswalk to uniquely identify the record.



Profile

It is a consolidated record from multiple sources/crosswalks. A profile is the enriched form of an entity.



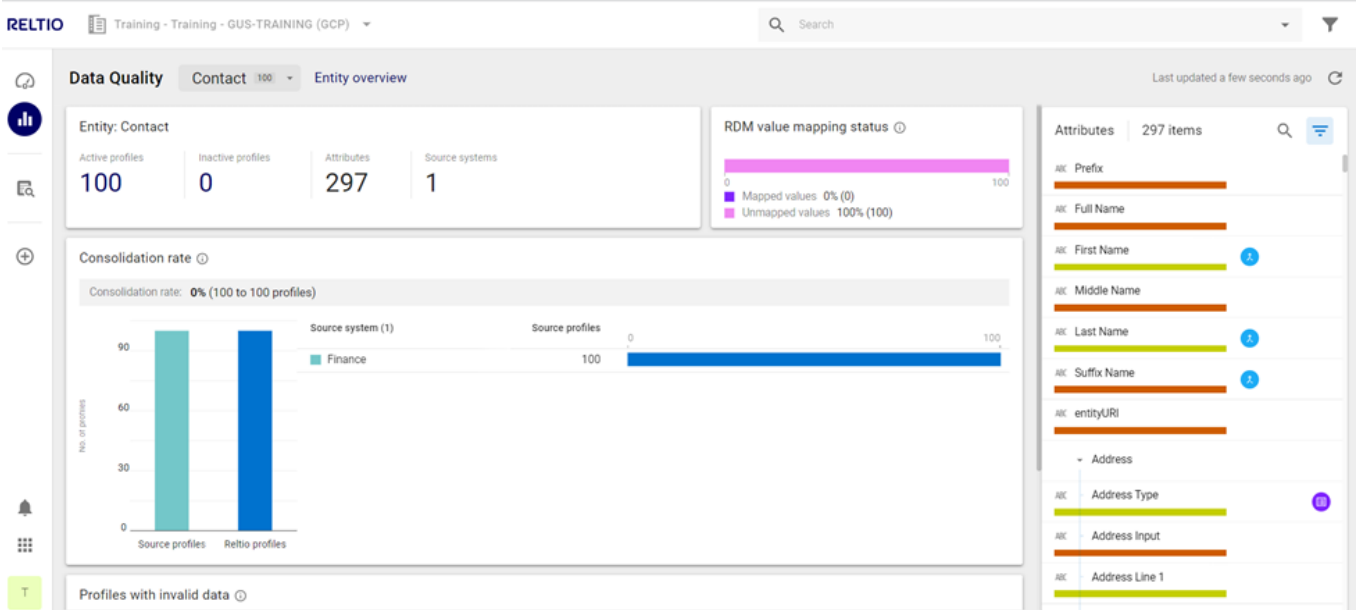
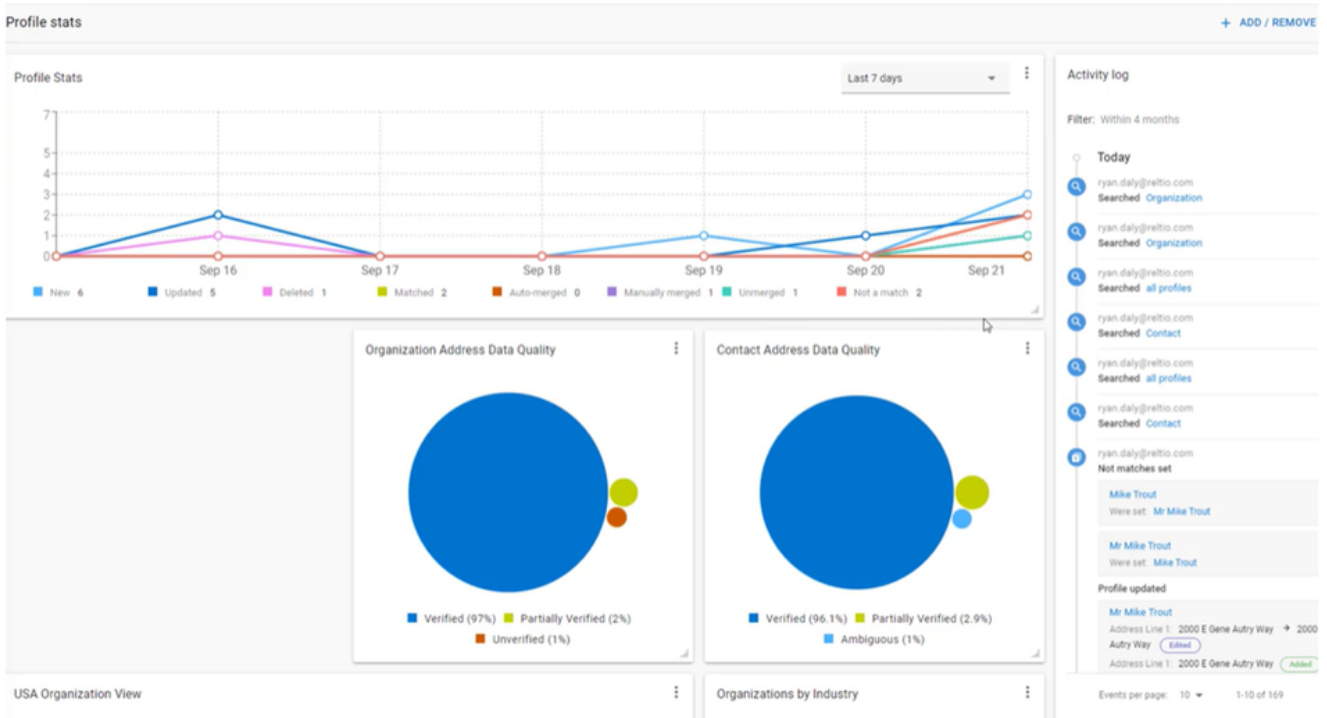
Relationship

It is a connection between two entities and can have simple and nested attributes.



Dashboard View

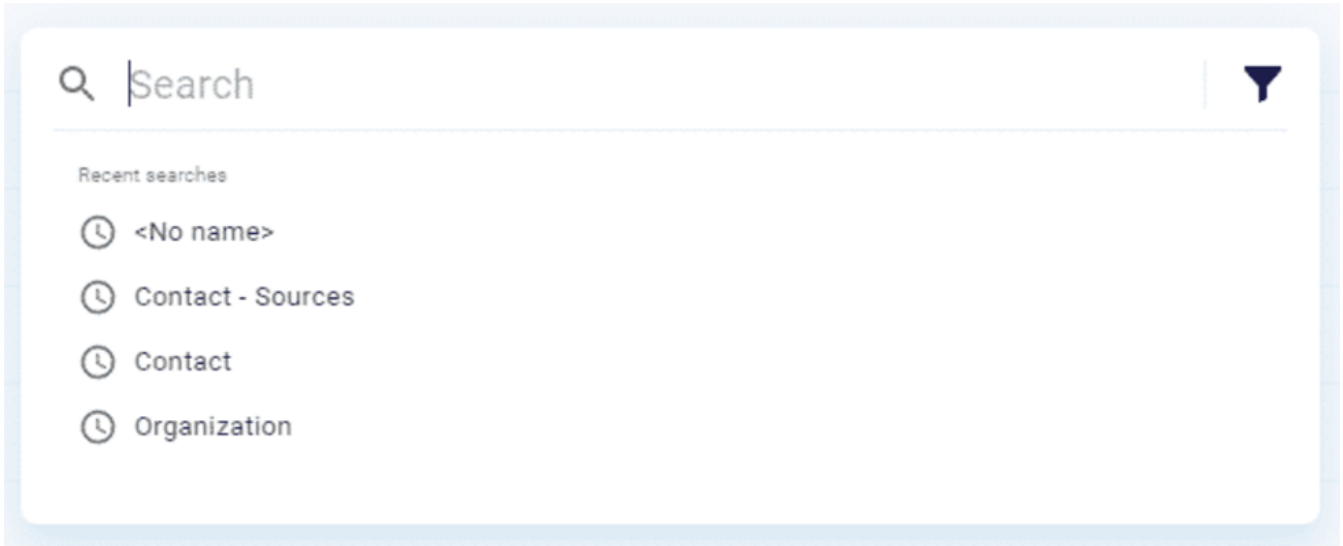
The Reltio dashboard provides users with a quick way to access key metrics about data in a tenant. Each Reltio user within an organization can adjust the facets on the dashboard so they only see information that is relevant to their role. The dashboard also displays the activity log which will allow users to track data changes across the tenant.



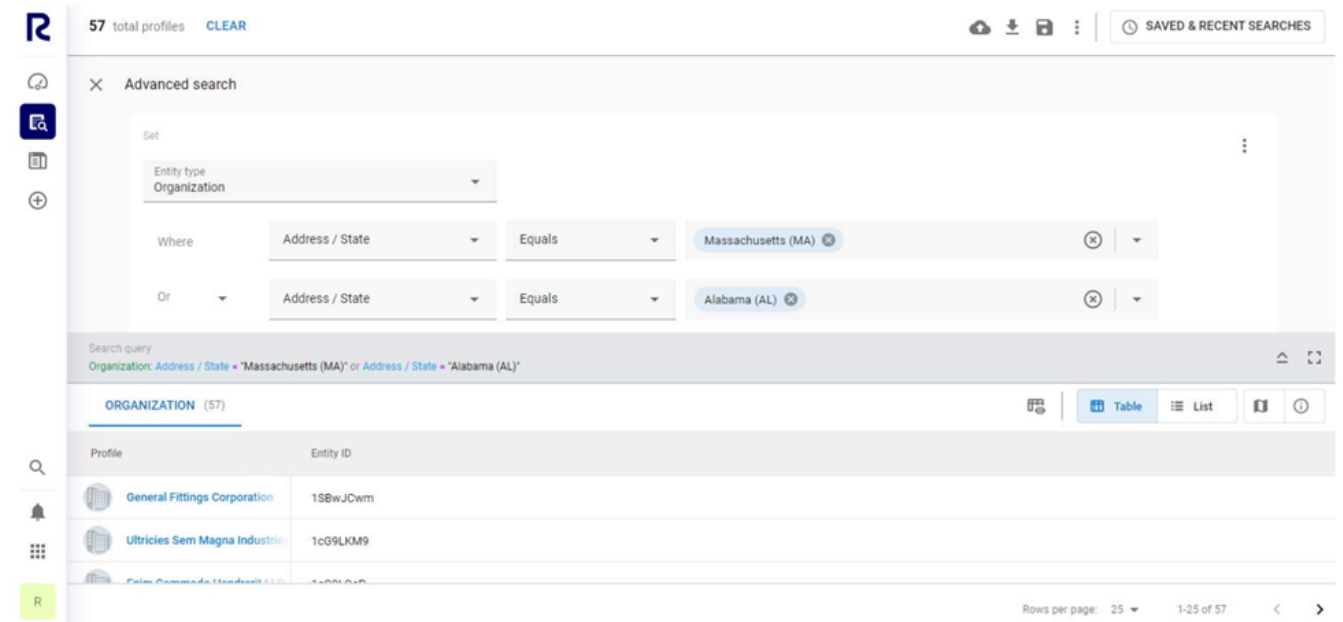
Search View:

Relt.io provides powerful search functionality that allows you to use various methods to search for records. Below are the different types to search a record in Relt.io.

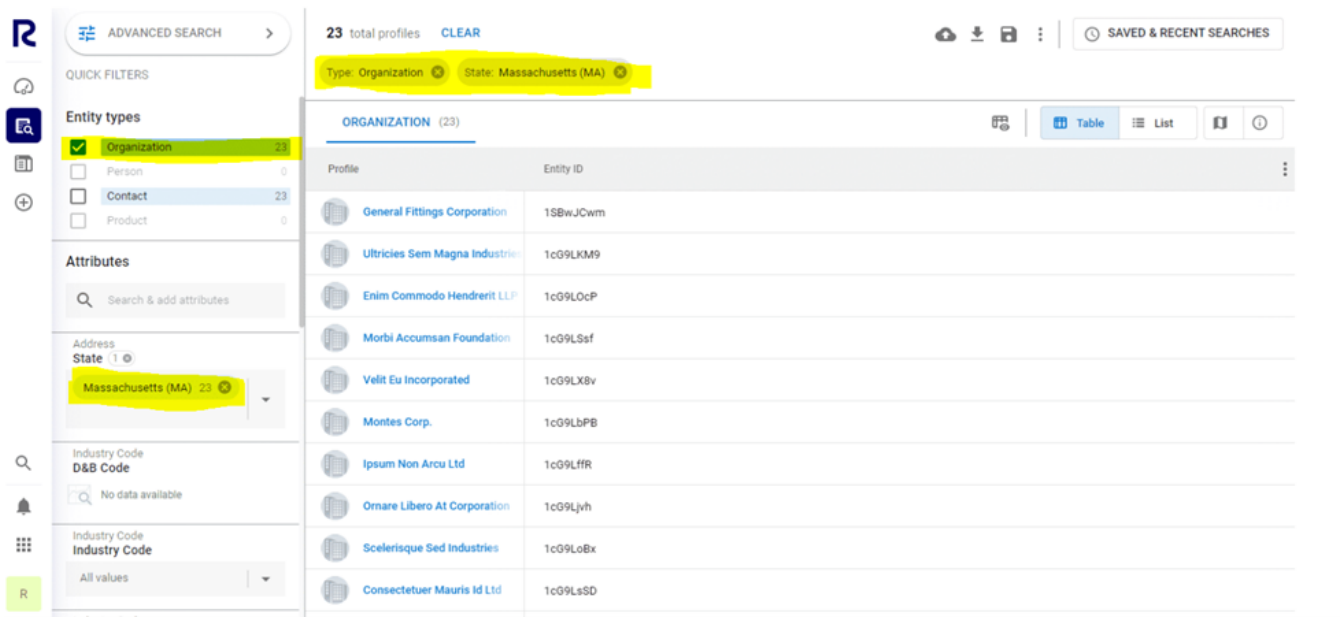
1. Quick Search - This feature allows users to perform a rapid keyword search for any data across all sources within their tenant.



2. Advanced Search - The Advanced Search feature enables users to perform a search using filters with capabilities that are like SQL queries. You can view the search results as a list, as a table, on a map, or see the main profile attributes.



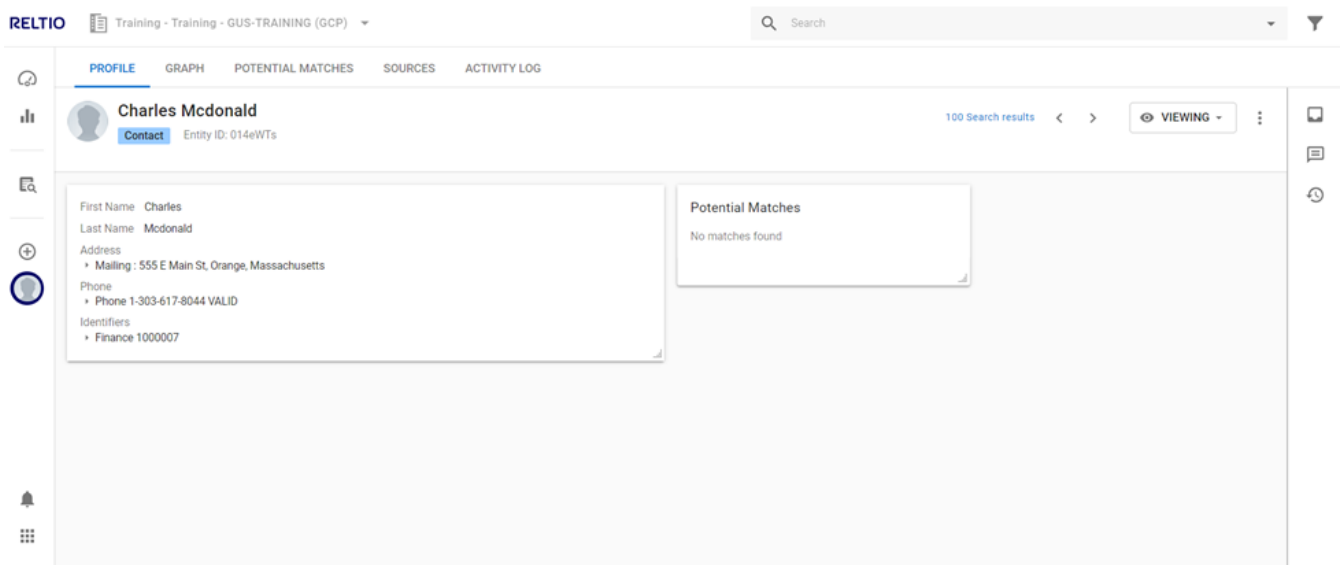
3. Faceted Search - The Faceted Search feature has three sections that enable you to perform highly refined searches within the interface by using filters. The attribute filters can be configured manually and are also powered by machine learning.



Profile View:

Source and attribute information is conveniently displayed within each entity's profile page.

1. Profile View - You can use the Profile View to explore the details of a profile for an individual entity type. You can also edit profiles, including changing the values of existing attributes and adding new ones.



2. Profile Sources - The Profile Sources view allows you to view and explore the sources that provide data for a profile. There could be multiple sources that have different profile attributes associated with them.

Survivorship rules are used to determine which attribute value(s) to pick from all those available from the different sources. The value selected by the survivorship rule for each attribute is known as the Operational Value or OV. The survivorship rules are evaluated at run time—there is no persisted golden record in Reltio.

The screenshot shows the 'SOURCES' view for the profile 'Charles Mcdonald' (Entity ID: 014eWTs). The main table displays attributes and their values:

Attributes & OV	Rule type	Attribute values
First Name Charles	Recency	Charles
Last Name Mcdonald	Recency	Mcdonald
Address • Mailing : 555 E Main St, Orange, Massachusetts	Aggregation	• Mailing : 555 E Main St, Orange, Massachusetts
Phone • Phone 1-303-617-8044 VALID	Aggregation	• Phone 1-303-617-8044 VALID
Identifiers • Finance 1000007	Aggregation	• Finance 1000007

On the right, the 'Legend' panel shows a crosswalk for 'Charles Mcdonald' with the following items:

- Entity ID: 014eWTs
- R Finance CON_1000007
- R Reltio Data Cleanser

- Profile Potential Matches - Reltio automatically flags records that are potential matches. Within the UI you can merge, unmerge, and manage the way potential matches are managed within your organization.

The screenshot shows the 'POTENTIAL MATCHES' view for the profile 'Charles Mcdonald' (Entity ID: 014eWTs). The 'Match Review' table displays the following information:

Relevance score	
Sources	R R
Crosswalks	<ul style="list-style-type: none"> R Finance CON_1000007 R Reltio Data Cleanser 014eWTs
First Name	Charles
Last Name	Mcdonald
Suffix Name	
Email	
Gender	
Identifiers	• Finance 1000007

Below the table, a 'Select profiles' prompt asks the user to 'Select one or more profiles to compare it with the current profile'.

- Profile History - The History tab within the Profile view contains the entire history of all the changes made to any available record.

The screenshot displays the Reltio user interface for a profile. At the top, the header shows 'RELATIO' and 'Training - Training - GUS-TRAINING (GCP)'. A search bar is located on the right. Below the header, there are navigation tabs: 'PROFILE', 'GRAPH', 'POTENTIAL MATCHES', 'SOURCES', and 'ACTIVITY LOG'. The 'PROFILE' tab is active, showing a profile for 'Charles McDonald' with a 'Contact' label and 'Entry ID: 014eWTs'. The profile details include: First Name: Charles, Last Name: McDonald, Address: 555 E Main St, Orange, Massachusetts, Phone: 1-303-617-8044 (VALID), and Identifiers: Finance 1000007. A 'Potential Matches' section indicates 'No matches found'. On the right, a 'History' panel shows '1 contributing profile' with a 'Current view' section. The history log includes: 'Profile updated' by 'training_tenant_creation_service' on 08/29/2023 7:59 PM, and 'Profile created' by 'training_tenant_creation_service' on 08/29/2023 7:59 PM. A sidebar on the left contains various icons, including a search icon, a plus icon, a profile icon, a bell icon, a grid icon, and a 'T' icon.

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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