

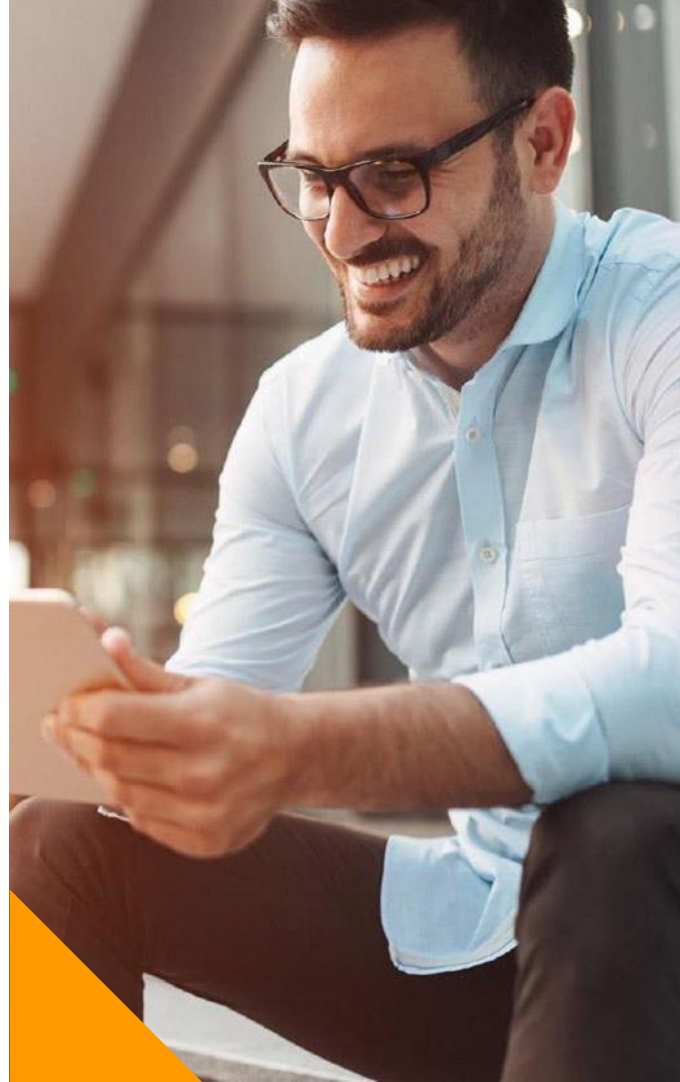


Reltio Workflow

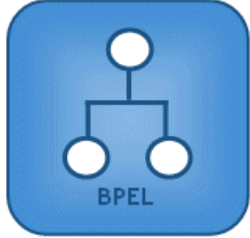
Dan Gage

Principal Solution Consultant

December 2021



Workflow / Business Process Management / BPEL



https://en.wikipedia.org/wiki/Business_Process_Execution_Language



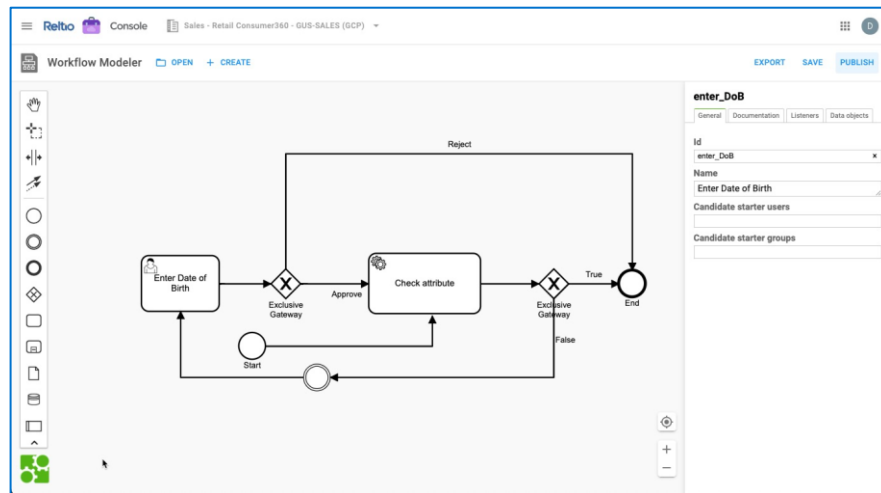
Activiti

<http://www.Activiti.Org>



<http://www.bpmn.io>

Reltio Workflow



RELTIO WORKFLOW OVERVIEW



DATA STEWARDSHIP WORKFLOWS



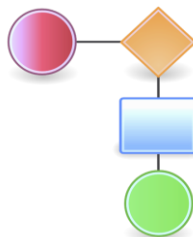
Potential Match
Review



Data Change
Request



Recommend For
Delete



CUSTOM WORKFLOWS



Activiti Based
workflow designer



Customize Reltio
workflows



PRODUCTIVITY



Mobile support



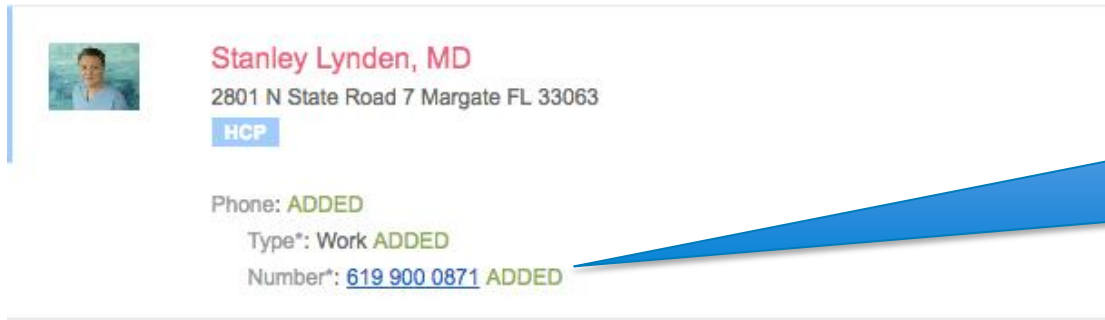
Email
Notifications,
Dashboard &
Reltio Inbox

EMAIL TASK NOTIFICATIONS



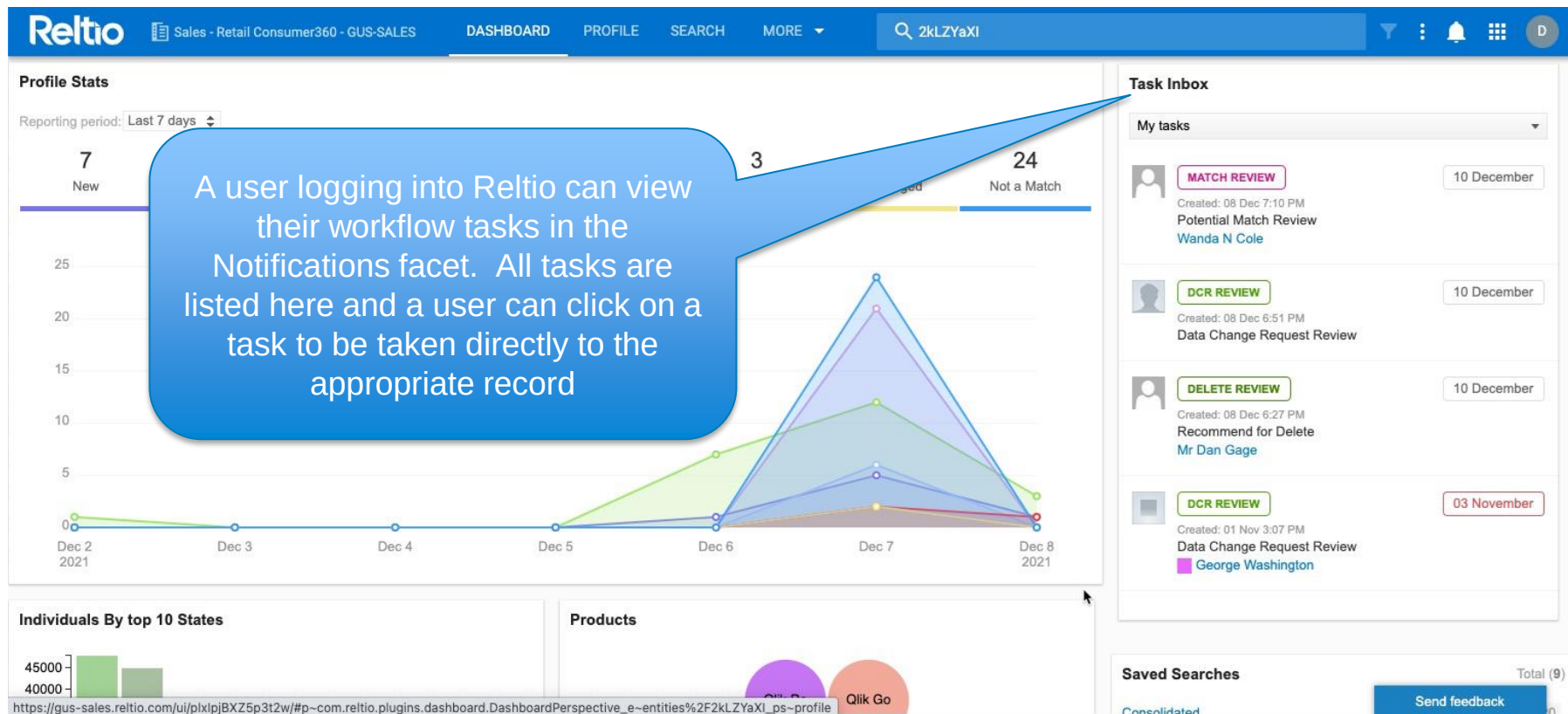
Users are notified of task assignment via email. Users can click on the hyperlink in the email to launch the record in the Reltio user interface

VIEW ON **RELTIO** CLOUD



Template based notification can alter details included in the notification.

DASHBOARD NOTIFICATION AREA



RELTIO INBOX

Mobile friendly user interface
dedicated to searching,
reviewing & acting upon any
Reltio workflow task

Applications

- Hub
- Console
- RDM
- Inbox**
- Reporting
- Integration

Reltio Inbox

Task	Created	Due
Today		
dan.gage@relio.com Recommend for Delete	Created: Today	Due: Dec 10
November		
dan.gage@relio.com Potential Match Review	Created: Nov 01	Due: Nov 03
dan.gage@relio.com Data Change Request Re...	Created: Nov 01	Due: Nov 03

Filter:

Created by	Task type	Step
All users	All tasks	Please select task type
Task variable key	Task variable value	Entity ID
DCR ID	Priority	Date created

Potential Match Review

INFORMATION

COMMENTS

Kerry B Mcpherson
1301 S Hawthorne Ave Sioux Falls South Dakota
Individual • 1SLV1QH

Kerry B Mcpherson
1301 S Hawthorne Ave Sioux Falls South Dakota
Individual • 2KXQ2MNe

Match Rules

- Rule4: Exact(First Name, Last Name, City, Street Number)
Fuzzy(Street Name)

Match Score 100

Full name

- Kerry B Mcpherson
- Kerry B Mcpherson

First name

- Kerry
- Kerry

More Information

RECOMMEND FOR DELETE → GDPR / CCPA

The screenshot displays the Reltio user interface. The top navigation bar includes the Reltio logo, a breadcrumb trail 'Sales - Retail Consumer360 - GUS-SALES', and tabs for 'DASHBOARD', 'PROFILE', 'SEARCH', and 'MORE'. A search bar is located on the right. The main content area shows the profile of 'Obsolete Profile' (Individual, Entity ID: 1Vck0wkC). The 'Base Profile' section lists attributes: Full Name (Obsolete Profile), First Name (Obsolete), Last Name (Profile), and Attribute Validations (Missing Date of birth). The 'Identifiers' and 'Email' sections show 'No data found' and 'Home old.address@company.com' respectively. A workflow diagram is highlighted with a green border, showing a process starting at 'Start', followed by a 'Delete Review' task, an 'Exclusive Gateway' (X), a 'Delete' path leading to a 'Delete Service' task, and finally an 'End' node. A 'Cancel' path also leads from the gateway to the end. On the right, a 'Workflows' card is highlighted with an orange border and an orange arrow pointing to a detailed view. This view shows the 'Recommend for Delete' workflow with a due date of Dec 10, 2021, assigned to dan.gage@reltio.com. The workflow steps include 'Delete Review' and 'Delete Service'. A 'Delete' button is visible at the bottom of the workflow card.

Reltio Sales - Retail Consumer360 - GUS-SALES DASHBOARD PROFILE SEARCH MORE Search...

Obsolete Profile
Individual
Entity ID: 1Vck0wkC

Base Profile

- Full Name Obsolete Profile
- First Name Obsolete
- Last Name Profile
- Attribute Validations
 - Missing Date of birth

Identifiers
No data found

Email All (1)
Home old.address@company.com

Address
No data found

Household
No data found

Workflow Diagram:

```
graph LR; Start((Start)) --> DeleteReview[Delete Review]; DeleteReview --> ExclusiveGateway{X}; ExclusiveGateway -- Delete --> DeleteService[Delete Service]; ExclusiveGateway -- Cancel --> End((End)); DeleteService --> End;
```

Workflows

Recommend for Delete

Write a comment

Start

DELETE REVIEW 10 December

Workflow **Recommend for Delete**

Due date Dec 10, 2021(change)

Assigned to dan.gage@reltio.com(change)

Step Delete Review

Created by dan.gage@reltio.com

Write a comment

Delete

DATA CHANGE REQUEST / SUGGESTION

Viewing

- Editing**
edit profile directly
- Suggesting**
edits become suggestions
- Viewing**
read or print profile
- Delete**
delete profile

Reltio Sales - Retail Consumer360 - GUS-SALES DASHBOARD

Wanda N Cole
1350 Kent St Columbus Ohio
Individual
Entity ID: 1SKT0HAH

DCR REVIEW

Workflow **Data Change Request Review**
DCR ID 3vUd1UyY
Due date Dec 10, 2021(change)
Assigned to dan.gage@reltio.com(change)
Step DCR Review
Created by dan.gage@reltio.com

▼ **Wanda N Cole** 1350 Kent St Columbus Ohio

SSN: 999-55-1234 added
Prefix: Married Woman added

Write a comment

Approve

Reltio Inbox

× Data Change Request... < > + - ✓

INFORMATION ADDITIONAL DETAILS COMMENTS

Wanda N Cole
1350 Kent St Columbus Ohio
Individual • 1SKT0HAH

Add

Ssn 999-55-1234 **REJECT**

Prefix Married Woman (Mrs)

UI EXAMPLE – MATCH REVIEW

Reltio Sales - Retail Consumer360 - GUS-SALES DASHBOARD PROFILE SEARCH MORE 1SKT0HAH

ADVANCED SEARCH >

QUICK FILTERS

- ☐ Organization 0
- ☐ Location 0
- ☒ Individual 1
- ☐ Contact 0
- ☐ Product 0
- ☐ Household 0

1 total profiles CLEAR

Type: Individual City: Columbus Match Rules: Rule4: Exact(First Name, Last Name, City, S... Search: 1SKT0HAH

INDIVIDUAL (1)

Profile	Entity ID	Scores
Wanda N Cole	1SKT0HAH	

Wanda N Cole
1350 Kent St Columbus Ohio
Individual Entity ID: 1SKT0HAH

Potential Matches

MATCH REVIEW 10 December

Workflow **Potential Match Review**
Due date Dec 10, 2021(change)
Assigned to dan.gage@reltio.com(change)

► Wanda N Cole, 1350 Kent St Columbu...

Merge

[See all...](#)

Request Match Review
Bulk update
Share link

Bulk starting match review tasks for a set of records

POST: https://prod-workflow.reltio.com/workflow-adapter/workflow/{{tenantID}}/processInstances/_generateFromQuery

HEADER: `environmenturl: https://361.reltio.com`

BODY:

```
{  
  "processType": "potentialMatchReview",  
  "searchString": "range(potentialMatches.matchScore,75,100)"  
}
```

Reltio default workflow source - ROCS

<https://bitbucket.org/relio-ondemand/workflow/src/master/default%20process%20definitions/>

Reltio Inc. / ROCS / Workflow

default process definitions

Check out ...

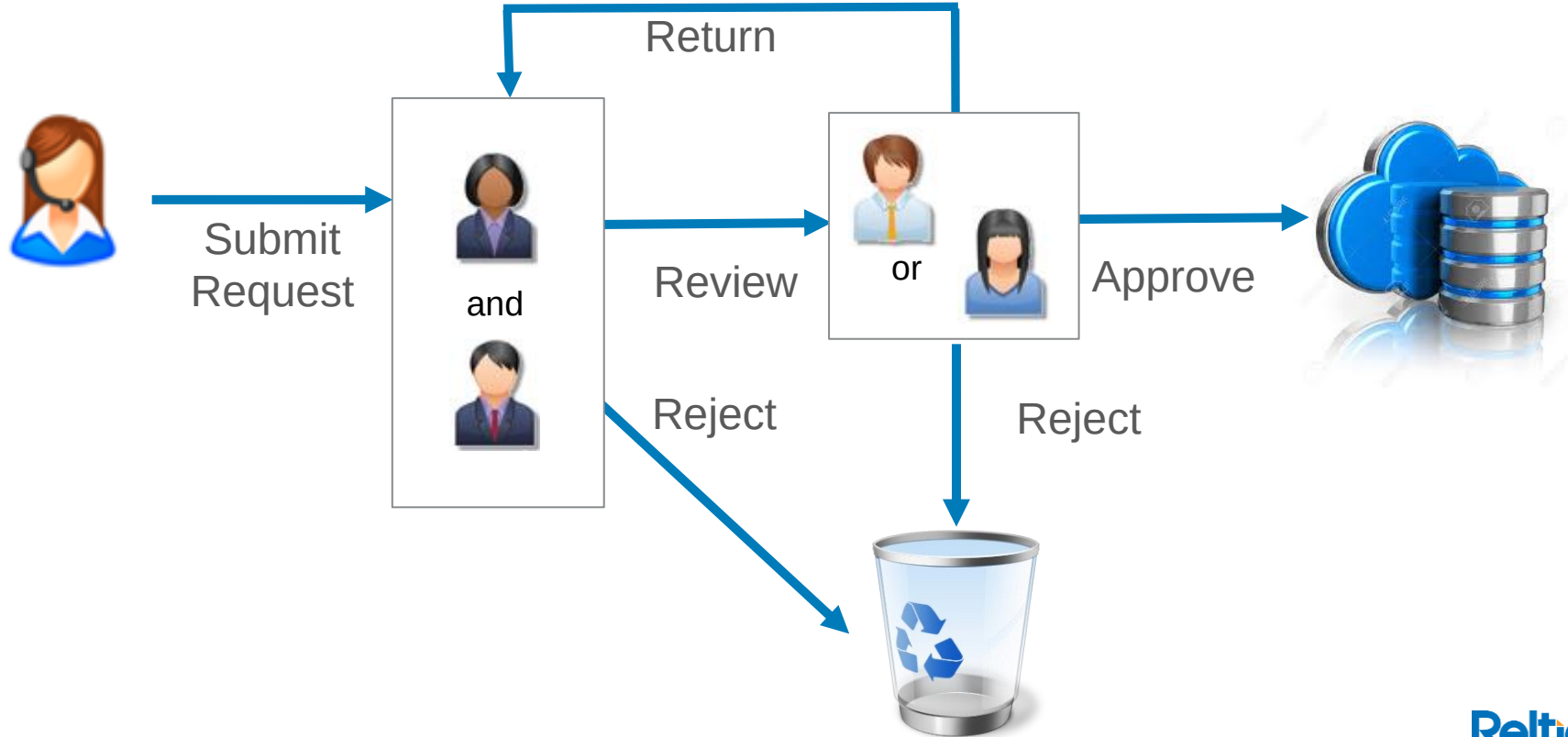
 master ▾

Files ▾ Filter files 

 workflow / default process definitions

Name	Size	Last commit	Message
 ..			
 DataChangeRequestReview		2021-06-09	RP-87241: Put OOTB process definiti...
 DeleteReview		2021-06-15	RP-87241: removed relation type liste...
 PotentialMatchReview		2021-06-15	RP-87241: removed relation type liste...

CUSTOM WORKFLOW SCENARIO



Create custom workflow



Workflow Modeler interface showing a BPMN diagram and configuration options.

Workflow Diagram: A BPMN diagram titled 'ssnReview' is displayed. It starts with a 'Start' event (circle), followed by a task 'Review Multiple SSN' (rounded rectangle with a person icon). The task is highlighted with a dashed blue border. To the right of the task is an 'End' event (circle). The flow is connected by a solid arrow. A toolbar on the left contains various BPMN symbols for events, tasks, and connectors. A configuration panel on the right shows settings for the selected task.

Configuration Panel (ssnReview):

- General tab selected.
- Id: ssnReview
- Name: Review
- ☐ Asynchronous
- ☒ Exclusive
- ☐ Is for compensation?

Workflow Customization Steps: General, Main, Form, Listeners



ssnReview

< General Main config Documentation Form Listeners >

Id

ssnReview x

Name

Review

ssnReview

< General Main config Documentation Form Listeners >

Form Key

Assignee

Candidate Users

Candidate Groups

ROLE_USER x

Due Date

P2D x

< General Main config Documentation Form Listeners >

Form Fields x +

Decision Validator

ID

decision x

Name

Decision x

Type

enum v

Expression

Variable

Default value

Reviewed x

Date pattern

☒ Readable

☒ Writable

☒ Required

Form values

Add value +

ID	Name
Reviewed	Reviewed x

< eral Main config Documentation Form Listeners >

Form Fields x +

Decision Validator

ID

validator x

Name

Validator x

Type

string v

Expression

Variable

Default value

com.reltio.workflow.interfaces.validator.SingleEntitl x

Date pattern

☒ Readable

☐ Writable

☐ Required

Form values

Add value +

< eral Main config Documentation Form Listeners >

Execution Listener x +

Task Listener x +

create : Java Class

Event Type

create v

Listener Type

Java Class v

Java Class

com.reltio.workflow.activiti.service.TaskStartEvent x

Fields

Fields x +

<https://docs.reltio.com/workflow/workflow.html>

Demo Scenario

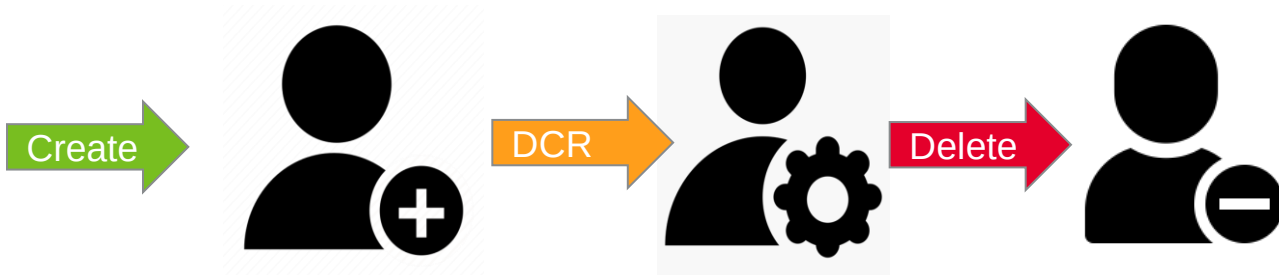
The screenshot displays the Reltio Inbox interface. On the left, a sidebar shows the 'Inbox' with 3 tasks, and other folders like 'Team' (0), 'Sent' (3), and 'All' (3). The main area shows a list of 3 tasks. The first task, 'Recommend for Delete', is assigned to 'Mr Dan Gage' and is due on Dec 10. The second task, 'Potential Match Review', is assigned to 'Kerry B Mcpherson' and is due on Nov 03. The third task, 'Data Change Request Re...', is assigned to 'George Washington' and is due on Nov 03. The 'Potential Match Review' task is expanded, showing a detailed view with a 'Match Score' of 100 and a 'Full name' of 'Kerry B Mcpherson'.

Task List:

Task	Assignee	Created	Due
Recommend for Delete	Mr Dan Gage	Today	Dec 10
Potential Match Review	Kerry B Mcpherson	Nov 01	Nov 03
Data Change Request Re...	George Washington	Nov 01	Nov 03

Potential Match Review Details:

- INFORMATION**
- COMMENTS**
- Match Rules**
 - Rule4: Exact(First Name, Last Name, City, Street Number)
 - Fuzzy(Street Name)
- Match Score** 100
- Full name**
 - Kerry B Mcpherson
 - Kerry B Mcpherson



Demo Scenario





Thank you