DATA HAVEN

USER MANUAL

DOCUMENT INFORMATION

Version	Date (DD/MM/YYYY)	Author	Comments	Reviewer	Approver
1.0	21/06/2023	NAVEEN K REDDY	Initial Version		

1. Introduction

DataHaven empowers data providers & consumers to safely share customer data within and outside business environment. Seamless exchange of data at scale helps advertising partners enrich customer data, derive advanced audience insights, implement better campaign management and accurate attribution & engagement scoring.

Collaborate your data while maintaining the highest levels of security and compliance with DataHaven. Our cutting-edge platform is designed to provide a seamless, no-code user interface (UI) experience on top of Snowflake Data Clean Room, enabling organizations to collaborate on sensitive data projects like never before.

The Webportal designed for the product caters to various roles such as Providers, Consumers, Ad Publishers etc.,

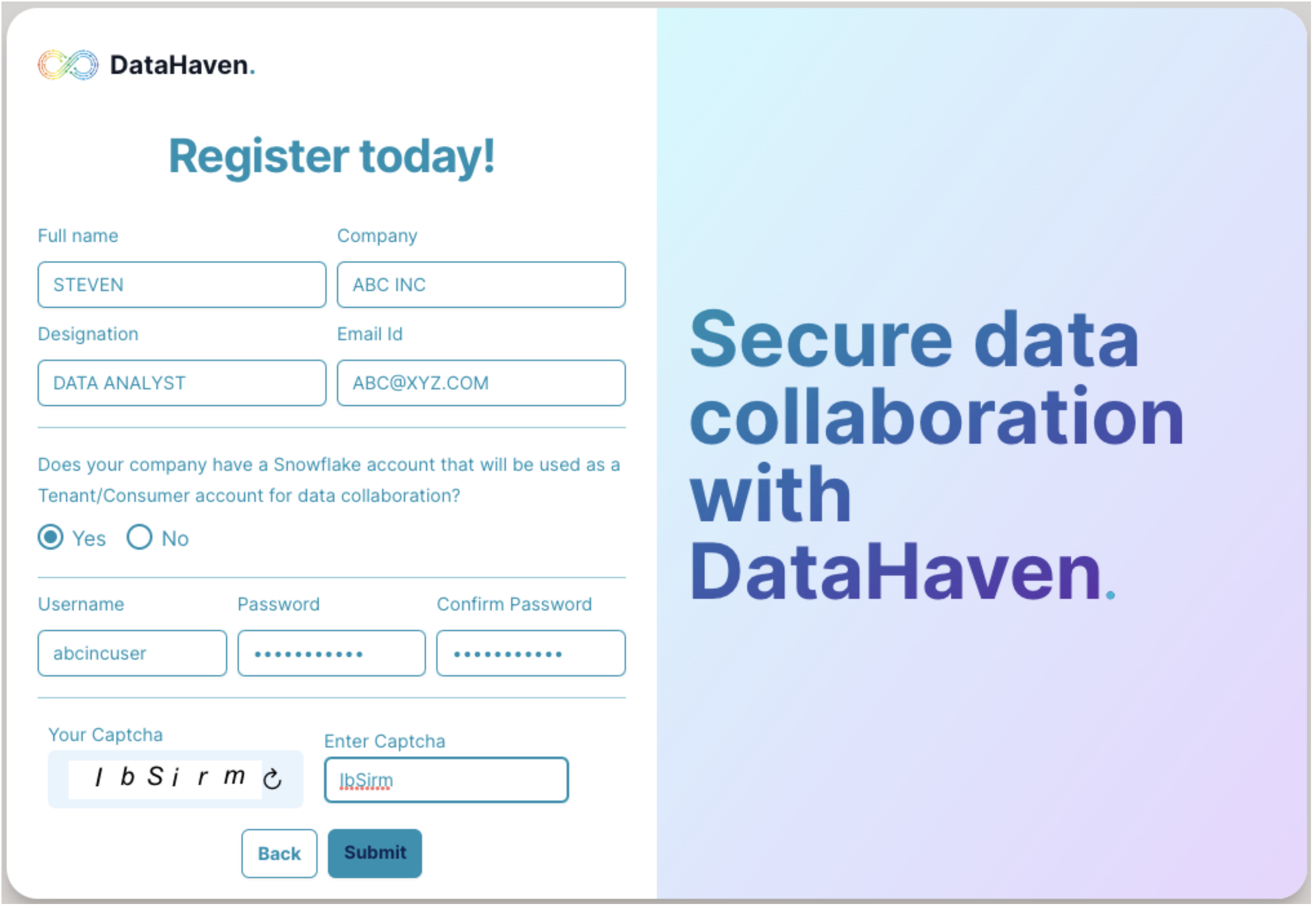
2. New User Signup/Registration

For new user registration please follow the below steps

a. New User has to login to Data Haven URL: …………………………………………………

b. Click on the SignUp button for registration.

c. Fill in the details as per illustration shown below



d. Once the Details are filled up in the Signup page as per the illustration shown below, user has to submit the details.
e. Then, the owner of the product, i.e. the Data provider will receive an email with the details you have provided. The Data provider then initiates the On-boarding process of the user . The Onboarding process includes creating login access and assigning basic permissions to the user.
f. Onboarding process completion would be Notified through email and user can login using the credentials he has provided during sign-up.

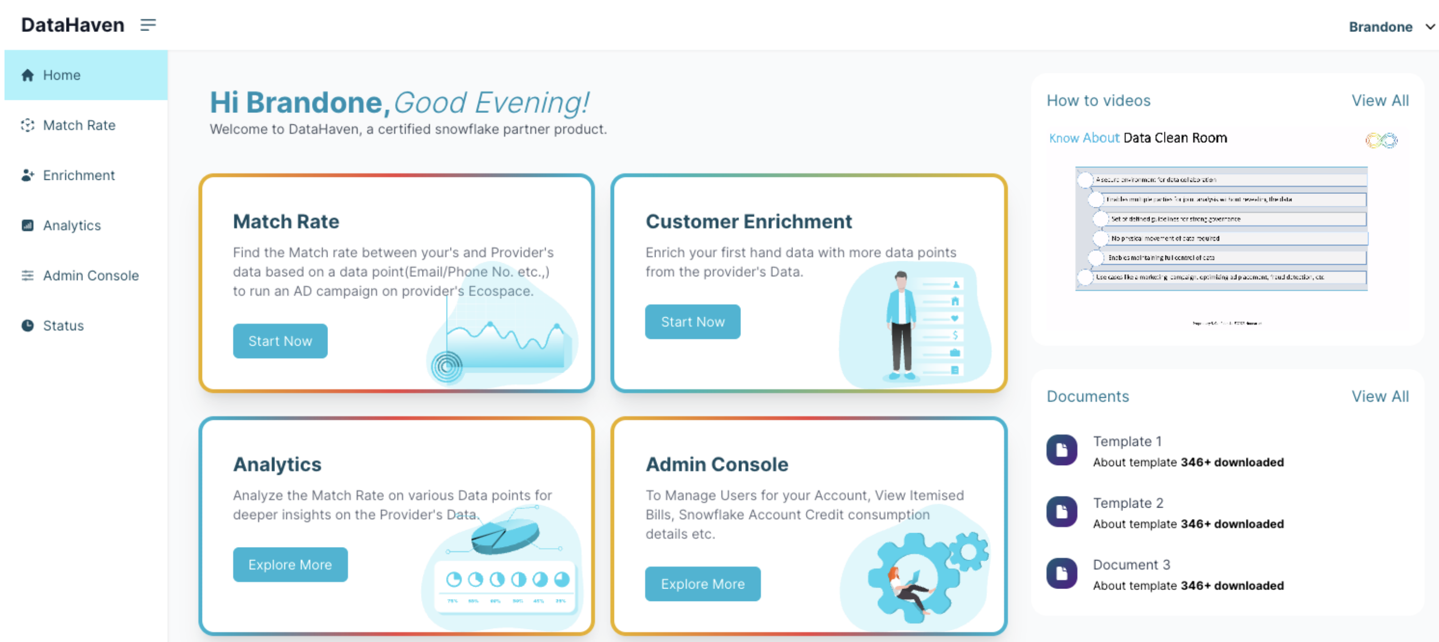
3. Home Page & Navigation

Once logged in User can see the homepage as below. The page displays navigation toolbars on the left, key use cases of DATAHAVEN in the centre and HOW TO/Demonstration videos & documentation on the right.

-----Screenshot Here----

As the user has been logged in to the for the first time into the Datahaven environment, only MatchRate use case will be visible. Once user performs the match rate and if the output is satisfactory, user can request to collaborate with the Data provider to unlock full features of Datahaven product. This would include agreement process which will be done with the consumer & the Provider.

If the User has already been collaborated with the Data Provider, then the home page will display all the use cases as below:



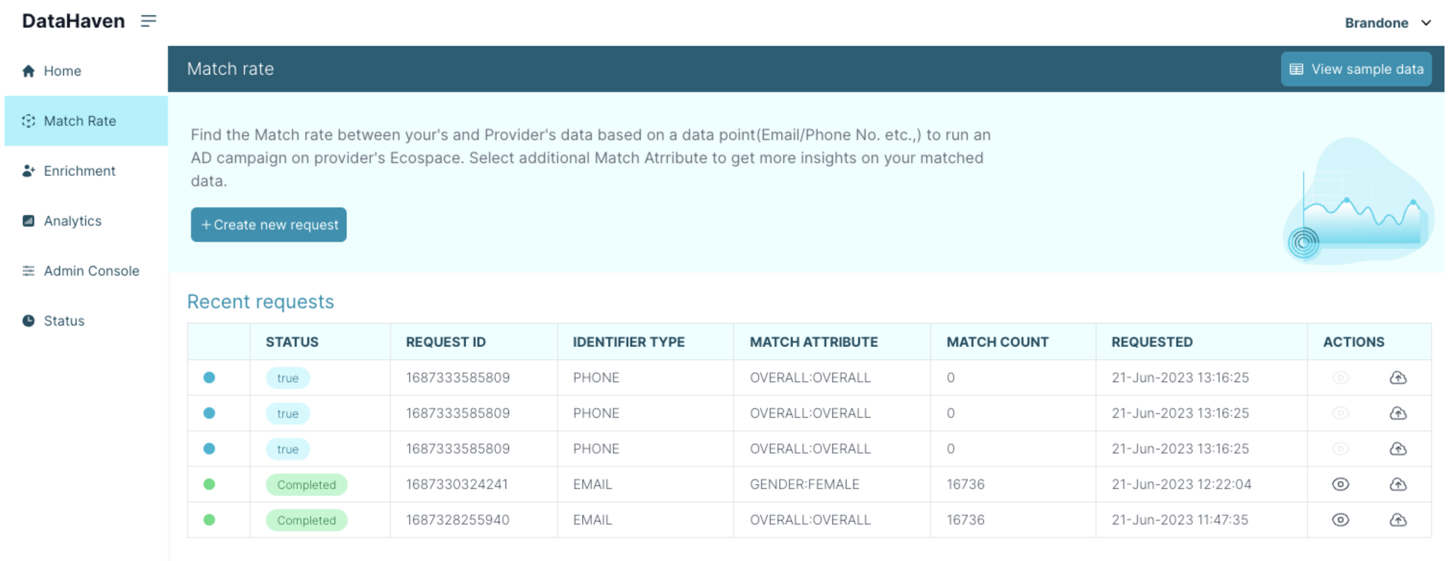
4. Match Rate

This section describes how to submit the MatchRate request & to analyse the output.

When navigated to the MatchRate use case for the first time, the webpage will show a step-by-step tutorial which will help the user to understand the steps for submitting the request.

4.1. Submitting a New request

Before submitting a request, User can go through the a sample of provider's data to get insights on what kind of data the provider has to offer. This will help the user/consumer to decide for selecting the Identifier types & match attributes. Brief description of the fields provided while submitting a new request as below:



----screenshot of the pop-up-----

Upload file: User has to upload a csv/xlsx file which should have first-hand data of the consumer for a particular data point like emailed/phone no/ MAID etc. This data would be utilised to perform match rate with providers data.

Identifier Type: the data point/column name on which the join would be performed between consumer's and provider's data. Also, the identifier type should be same as the data which is there in the uploaded file. i.e. emailID/Phone no/MAID

Match Attribute: If the user wants to do additional matching based on specific data point and specific value for that data point, then user can select one of the option from the Match Attribute drop down menu. If overall is selected, then no additional match would be done apart from identifier type.

Match value: If any Match attribute is selected other than overall, then user has to provide the value with which match attribute selected has to perform match with. Illustration below.

----screenshot-----

4.2. Processing the Request

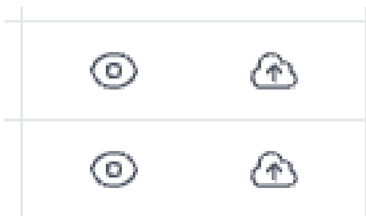
Once the request is submitted, the request would be visible below along with status & other details. The recent five submitted requests will be visible at every point of time. Below mentioned are the various states that the requests can have:

a. Request Initiated: immediate state once the request is submitted

b. Waiting for approval: this state indicated that the portal has sent the request to provider’s account for approval
c. Approved: The Data provider approved the request
d. In Progress: The data fetching from the provider account and making it visible to the User.
e. Completed: The request has been processed successfully and the user can view the output.

4.3. Analysing the output

To analyse the output, ACTION column has been provided in the status section of the MatchRate page. The ACTION column has following features:



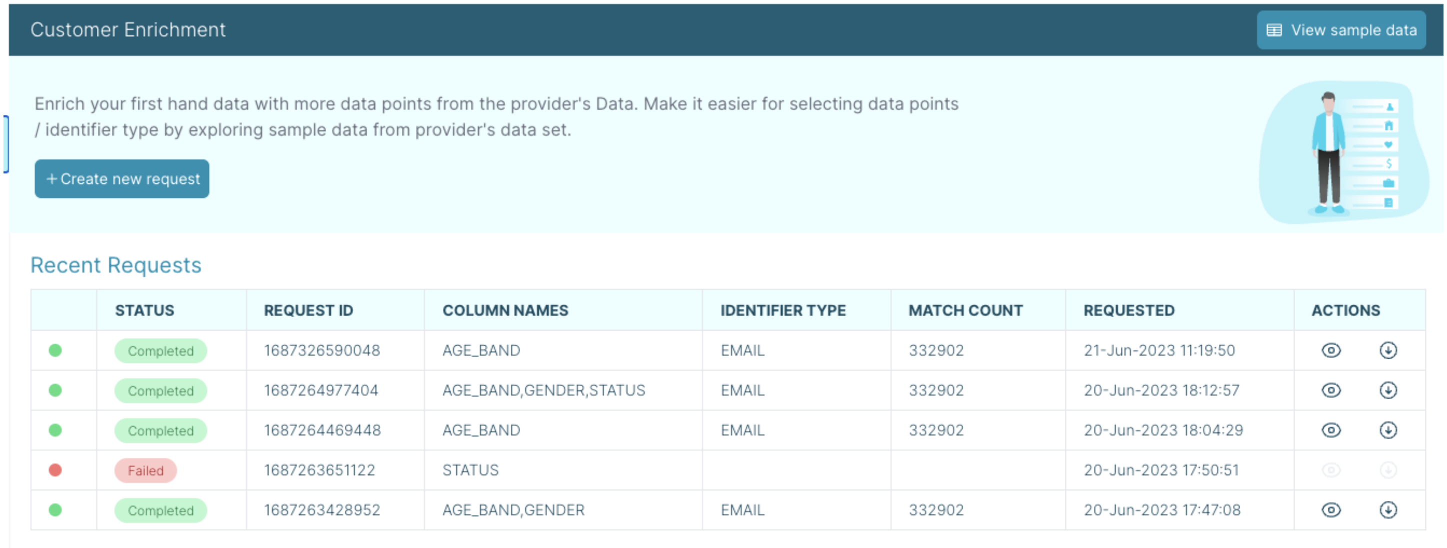
View Button : the output of the request can be seen by clicking on the button

Upload Button: If the Match rate is good and consumer wants to run an AD campaign for the matched data points, by clicking this button the matched email IDs will be uploaded into the client’s ecospace and client will run AD campaign only to those data points (emailIDs / Phone Nos.)

5. Enrichment

5.1. Submitting a New request

Before submitting a request, User can go through the a sample of provider’s data to get insights on what kind of data the provider has to offer. This will help the user/consumer to decide for selecting the Identifier types & match attributes. Brief description of the fields provided while submitting a new request as below:



----screenshot of the popup----

Identifier Type: the data point/column name on which the join would be performed between consumer's and provider's data. i.e. emailID/Phone no/MAID

Columns: The columns/data points by which the consumer wants to enrich his data with.

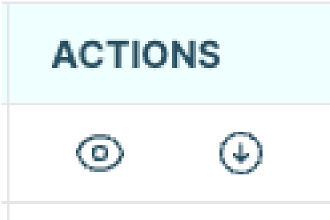
5.2. Processing the Request

Once the request is submitted, the request would be visible below along with status & other details. The recent five submitted requests will be visible at every point of time. Below mentioned are the various states that the requests can have:

f. Request Initiated: immediate state once the request is submitted
g. Waiting for approval: this state indicated that the portal has sent the request to provider's account for approval
h. Approved: The Data provider approved the request
i. In Progress: The data fetching from the provider account and making it visible to the User.
j. Completed: The request has been processed successfully and the user can view the output.

5.3. Analysing the output

To analyse the output, ACTION column has been provided in the status section of the Enrichment page. The ACTION column has following features:



View Button : the output of the request can be seen by clicking on the button. It will show only 1000 records of the output in the webUI. If user wants to see the complete output dataset, the user can use the download button provided adjacent or user can login to the consumer's snowflake account to view the dataset.

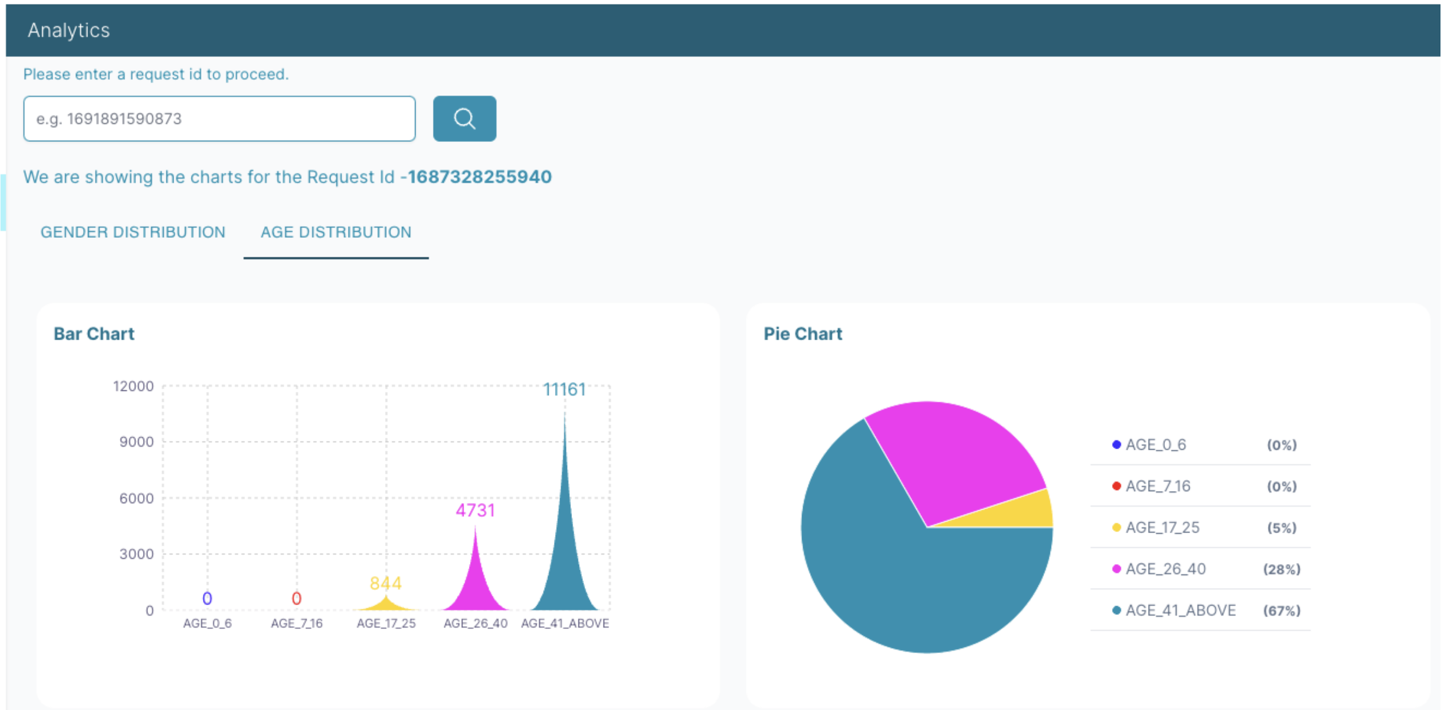
Download Button: The Output dataset can be downloaded in the form of a csv file using this button.

6. Analytics

This section describes how consumer can view additional analytics on the Match rate output data. Once the match request has been successfully processed/completed, the user can get more insights on the matched data from the analytics page.

Illustration: Lets consider consumer has uploaded file which has 1,00,000 emailids and out of which 85000 records are matching with the providers data. If consumer wants to get more insights on this 85000 records, like how many of those matched records are male or how many of those matched records are aged between 21-40 years.

The analytics page would be as below:



In this case, analytics are shown based on two data points i.e. Gender & Age. The more data points provider shares for analysis, more insights consumer would get using the Analytics feature.

7. Admin Console

Admin console provides the Admin for the consumer account to see the itemised bill for the account month wise.

8. How to Videos

This section hosts how to videos, which will show steps to perform major operations/actions that can be done using the DataHaven portal.

9. Documentation

This section provides basic documentation to help the users perform their tasks in the DataHaven portal

10. Conclusion

As mentioned above, we can use the DataHaven portal to collaborate with the data providers and perform use cases like enrichment, match rate, running targeted AD campaigns in a secure way powered by snowflake.