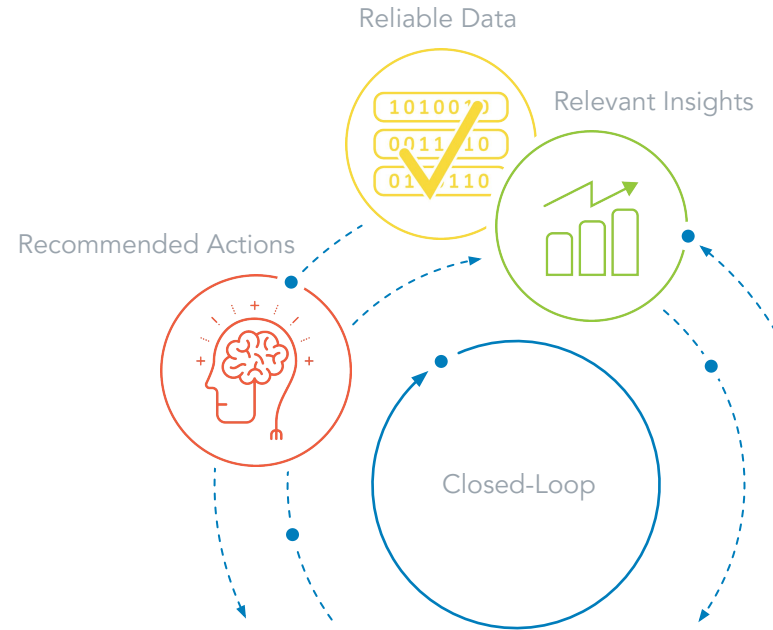# Reltio Cloud Beginner 101
Final Lab

Assessment

BACKGROUND

- In this final lab exercise, you will receive a set of functional requirements and technical requirements.
- You are expected to review the technical requirements and implement these in your Reltio tenant.
- The technical requirements include making configuration changes to your tenant and then addition of data to confirm the configuration changes are working as expected

Once you have implemented the final lab exercise, you can upload your tenant configuration in the course module "Upload your tenant configuration"

SCENARIO

- You are the technical configurator for your company, Corporate Superfly Services Inc.
- Superfly Services Inc. wants to track and manage all the Superfly Services Inc employees in a centralized system
- Superfly Services Inc. has selected Reltio, a modern data management application so that they can Be Right Faster by creating a true Account 360 view.

COMPANY OVERVIEW

Corporate Superfly Services Inc. is a private jet charter company that caters to the travel needs of corporate executives.

The company boasts a fleet of over 200 aircraft and rely on the labour of over 1000 employees who operate across the US, Canada, EU & Asia.

DEFINITIONS

Organization: Superfly Services and companies Superfly Services Inc. does business with

Contact: Individuals working at the companies Superfly Services Inc. does business with

Employee: Individuals working at Superfly Services Inc.

DATA MODEL

After reviewing the requirements and Reltio's Data Driven Applications, it was decided to leverage Account 360 as a solution accelerator.

Next, you will configure Reltio to implement the requirement

FUNCTIONAL REQUIREMENTS

- Establish centralized repository (Reltio) to store and manage organization and employee data coming from HR and CRM system

- System should be able to store and display relationships between
  - Organization to Employee
  - Employee to Organization

- Have effective processes to; cleanse, standardize, match and merge Employee data

NOTE: In all the following Lab exercises be sure to use the nested address attribute "Addresses". Do NOT Use the reference attribute "Address" as this will not work correctly.

TECHNICAL REQUIREMENTS

Req Id	Requirement
1	Create a new entity type Employee by *inheriting* from the Individual entity type
2	Employee entity type should have simple attributes : First Name, Last Name, Title, Employee Status*, Employee Start Date**
3	Employee entity type should have nested attributes : **Phone**: Type, Number, Status **Address**: Type, Address Line 1, Address Line 2, City, State, Zip, Country **Email**: Type, Email, Status **Achievement**: Achievement Type, Achievement Name, Date completed**
4	Add a new source - HR
5	Setup primary data label pattern for Employee entity type - First Name, Last Name
6	Setup secondary data label pattern for Employee entity type - City, State

*Use the inherited "Status" attribute for this and change the label to "Employee Status"
** Only the Start Date and Achievement attributes need to be added. The rest will be inherited from Individual

TECHNICAL REQUIREMENTS

Req Id	Requirement
7	Add a new directed relation type "Occupation" between Employee and Organization Relation type label should be "Works at" starting from employee and ends in organization Relation type label should be "Employs" starting from organization and ends in employee
8	Add employee entity using Reltio API from HR source **Name: John Smith** **Address: 100 Main St, Safety Harbor, FL 34695** **Employee start date: 04/10/2018, Title: Configurator, Employee Status: Active** **Phone: Home, 8880001010** **Phone: Mobile, 1011011111** **Achievement: Training, Reltio cloud beginner 101, 04/01/2019** **Achievement: Certification, Reltio core configurator, 05/01/2019** **Crosswalk Id: EMP_101**
9	Add Organization entity using Reltio API from HR source **Name: Superfly Services Inc** **Address: 100 Main St, Darby, PA 19023** **Crosswalk Id: ORG_101**

Req Id	Requirement
10	Add an Employee relationship facet on the Organization entity type Add an Organization relationship facet on the Employee entity type (Hint: Use the "Occupation" relation type you created in step 7.)
11	Add relationship data to link Employee John Smith to Superfly Services Inc using API
12	Create a new match rule to automatically merge duplicate employee records based on First Name (Fuzzy), Last Name (Fuzzy), City (Exact), Phone (Exact) (Hint: Use configuration/entityTypes/Contact/matchGroups/Rule3 as your starting point)
13	Create a SUSPECT match rule to generate potential matches for duplicate employee records based on First Name (Fuzzy), Last Name (Fuzzy), State (Exact), Email (Exact)

TECHNICAL REQUIREMENTS

Req Id	Requirement
14	Setup Survivorship rule for attributes as following First name and last name - recency Phone - Aggregate Address - Aggregate Title - Source system (1. HR, 2. CRM)
15	Download employee_final_lab.zip available in additional references section of the course, unzip it and load the extracted employee data file (employee_final_lab.csv) using the reltio console data loader. This data file should be mapped to HR source
16	Verify the merges and potential matches after step 15 and 16 are complete

Questions: training@reltio.com