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Unlock AI-Driven Cloud Integration Insights with CLAIRE Copilot

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Where data & AI come to 

Housekeeping Tips



- Today's Webinar is scheduled for **1 hour**
- The session will include a webcast and then your questions will be answered live at the end of the presentation
- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to "All Panelists" via the **Q&A option** and we will respond at the end of the presentation
- The webinar is **being recorded** and will be available on our [Success Portal](#) - where you can download the **slide deck** for the presentation. The link to the recording will be emailed as well.
- Please take time to complete the **post-webinar survey** and provide your feedback and suggestions for upcoming topics.

Feature Rich Success Portal



Bootstrap trial and
POC Customers



Enriched Customer
Onboarding
experience



Product Learning
Paths and Weekly
Expert Sessions



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Tailored training and
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Communities & Support

<https://network.informatica.com>



Documentation

<https://docs.informatica.com>



University

<https://www.informatica.com/in/services-and-training/informatica-university.html>

Safe Harbor

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Agenda

- Introduction to CLAIRE & CLAIRE Copilot
- Architecture: How CLAIRE Works
- CLAIRE Copilot in Action: CDI, CAI, and CDIR
- Demo Highlights & Key Takeaways
- Q&A Session



Introduction to CLAIRE & CLAIRE Copilot

Where data & AI come to **LIFE**

What is CLAIRE[®]?

Bringing data & AI to life through AI-powered data management



What is CLAIRE Copilot?

- CLAIRE Copilot is Informatica's generative AI assistant embedded in Intelligent Cloud Services (IICS).
- Offers a conversational interface for users to interact with integration assets using natural language.
- Enables creation, summarization, and understanding of data processes without manual configuration.
- Improves productivity by automating repetitive and complex tasks.
- Supports a wide range of connectors and integration scenarios.

What is CLAIRE & CoPilot

- CLAIRE is Informatica's AI and machine learning engine integrated within Intelligent Data Management Cloud (IDMC). It plays a critical role in enhancing productivity, ensuring data quality, facilitating analytics, and enabling end-to-end data management processes.
- CLAIRE CoPilot expands the functionality of CLAIRE by leveraging generative AI. It acts as an **AI assistant embedded in Informatica services**, interacting with users in natural language to simplify, optimize, and automate complex workflows. Its functionality spans across services such as Cloud Data Integration (CDI), Cloud Data Ingestion and Replication (CDIR), and Cloud Application Integration (CAI).

Key Benefits of CLAIRE Copilot

- Drives automation across data integration, application integration, and data quality workflows.
- Delivers intelligent recommendations for mapping, transformation, and data standardization.
- Accelerates onboarding and reduces errors with guided assistance.
- Enhances user experience by making advanced features accessible to non-technical users.
- Continuously learns and improves from user and organizational metadata.

Pre-Requisites

- PODs with Co-Pilot availability :
- New pods with Co-Pilot for Data Integration :
IICS AWS EMEA - <https://emw1.dm-em.informaticacloud.com>
IICS AWS UK - <https://uk1.dm-uk.informaticacloud.com>
IICS AWS APJ (Sydney) - <https://apse1.dm-ap.informaticacloud.com>
IICS AWS Canada - <https://nac1.dm-na.informaticacloud.com>
- All US AWS Pods
- Above mentioned AWS Pods are enabled for both iPaaS-CoPilot and DI-CoPilot services.
- **What license do I need to start using CoPilot?**
- You need the Informatica IDMC Edition license to start using CoPilot. Also, CLAIRE CoPilot will work **only on IPU based consumption model**.
- **Do I need any additional configuration?** You need to enable the flag : "Enable CLAIRE Generative AI Services" under Administrator > Setting.
- CoPilot works with the standard setup of your DI and CAI applications.
- There is no need to whitelist any additional addresses or IPs.
- *Refer for more details: https://knowledge.informatica.com/s/article/FAQ-CLAIRE-CoPilot?language=en_US*

Architecture of CLAIRE – How It Works

How CLAIRE Operates

- Leverages machine learning and AI to analyze metadata and user interactions.
- Ingests anonymous mapping metadata across organizations to build intelligent recommendations.
- Integrates directly into the IICS platform, enabling real-time guidance and automation.
- Utilizes generative AI models to interpret natural language prompts.
- Continually refines suggestions based on feedback and evolving usage patterns.

CLAIRE Integration Points

- Embedded within Intelligent Cloud Services (IICS) for seamless user experience.
- Accessible through web UI, APIs, and conversational interfaces.
- Supports core modules: CDI (Cloud Data Integration), CAI (Cloud Application Integration), and CDIR (Cloud Data Integration Runtime).
- Works with connectors for popular platforms like Salesforce, Oracle, Snowflake, and more.
- Provides both interactive and background AI-driven assistance.

CLAIRE Copilot Use Case

CLAIRE Copilot Use case Summary



Scale Data & AI Teams for Increased Productivity

- Curate Enterprise Datasets for Analytics, AI, and Regulatory Compliance
- Relate Datasets for Data Governance, Data Operations, and Regulatory Compliance
- Intelligent Data Pipeline Building & Summarization
- Auto Tune and Scale Data management workflows



Democratize Trusted Data for Actionable Insights

- Automated Data Quality Assessment
- Deduplicate master data at a billion-record scale



Bridge Skill and Data Literacy Gaps

- Enable Citizen Data Integrators and Engineers for Reporting, Analytics, and AI
- Intelligent Structure Discovery for Log Analytics
- Data Discovery and Governance for non-IT users

CLAIRE Copilot Use Case

CLAIRE[®] powered Data Integration
Driving Efficiency through CLAIRE



CLAIRE for CDI, CAI, and CDIR

CLAIRE in Cloud Data Integration (CDI)

- Source Recommendations: Suggests related tables or objects for mapping based on metadata and key relationships.
- Join Recommendations: Identifies and proposes joins using primary and foreign key relationships.
- Union Recommendations: Suggests unioning of tables with similar structures to consolidate data.
- Transformation Recommendations: Proposes relevant transformations, mapplets, and user-defined functions.
- Data Quality: Recommends standardization and masking of sensitive data.

Ask Copilot

What it can do today

Feature

- Ask for help on any products or services offered by Informatica
- Find out responses to your questions by leveraging info available in the INFA documentation portal, KB articles, and How-to-articles

Benefits

- Increased literacy of IDMC products
- Usage, gaps, issues and best practices

Who should use this?

- New Data Engineers, Data Analysts, Architects



The screenshot displays the Informatica Data Integration user interface. At the top, there's a navigation bar with the Informatica logo and 'Data Integration' text. A sidebar on the left contains navigation options: 'New...', 'Home', 'Data Catalog', 'Explore', 'Bundles', 'My Jobs', and 'My Import/Export...'. The main content area features a 'Welcome Infa, what would you like to do today?' message with a 'Do you use a cloud data warehouse as your primary destination?' prompt. Below this are three cards for 'Ingest', 'Transform', and 'Orchestrate'. There are also two tables: 'Recent assets' and 'Recent jobs'. The 'Recent assets' table has columns for Status, Name, and Location. The 'Recent jobs' table has columns for Status, Instance Name, and Start Time. On the right side, there's a 'CLAIRE Copilot' chat window with a message: 'Hi! I'm still learning. I can help with a few tasks, but soon I'll be able to do much more.' Below the chat window is a 'How to create a SQL ETL mapping' article with a list of steps and a search bar for 'Ask CLAIR...'. At the bottom, there are four quick action buttons: 'Add another user', 'Let's get connected!', 'Use our data trans...', and 'Get insights!'.

CLAIRE in Cloud Data Ingestion & Replication(CDIR)

- Optimizes execution by recommending runtime configurations and resource allocations.
- Monitors and analyzes job performance for efficiency improvements.
- Provides troubleshooting guidance and best practices based on real-world usage.
- Ensures high availability and scalability through intelligent workload management.
- Learns from operational metadata to enhance future recommendations.

Automated and Augmented Generation

What it can do today

Feature

- Generate mappings and Mass Ingestion tasks (CDIR) using Natural Language
- Interactive interface to enable appropriate functionally complete ingestion assets and mappings

Benefits

- Save time and effort and standardize data asset creation generation in Data Integration

Who should use this?

- Data Engineers, Data Analysts

The image displays two screenshots of the Informatica Data Integration interface. The top screenshot shows the 'Auto Ingest Salesforce To ADLS Gen2' workflow configuration. It features a 'How do you want to transform your data?' section with a visual representation of data flow from a 'Source' (Salesforce) through '2 Tables Selected' to a 'Destination' (ADLS Gen2). A 'CLAIRE Copilot' sidebar on the right provides insights and suggestions, including a list of 'Salesforce Connections' and 'ADLS Gen2 Connections'. The bottom screenshot shows the 'm_datalake_enrichment' mapping design. The design view includes a flowchart with steps: 'ADLS Gen2 ORDER', 'SORT_SOURCE', 'FIL_QUARTER', 'AGG_SALES_SUMMARY', 'EXP_FORMAT', and 'Target'. A 'Properties' panel at the bottom left shows the 'Source' configuration for 'm_datalake_enrichment', including its name, location, and a detailed description. The 'CLAIRE Copilot' sidebar on the right provides a summary of the workflow and offers next steps like 'Create mapping', 'Save and run', and 'Ask Claire...'. The interface is branded with 'Informatica Data Integration' and 'Blue Sky Technologies'.

Mapping Descriptions and Summarizations

What it can do today

Feature

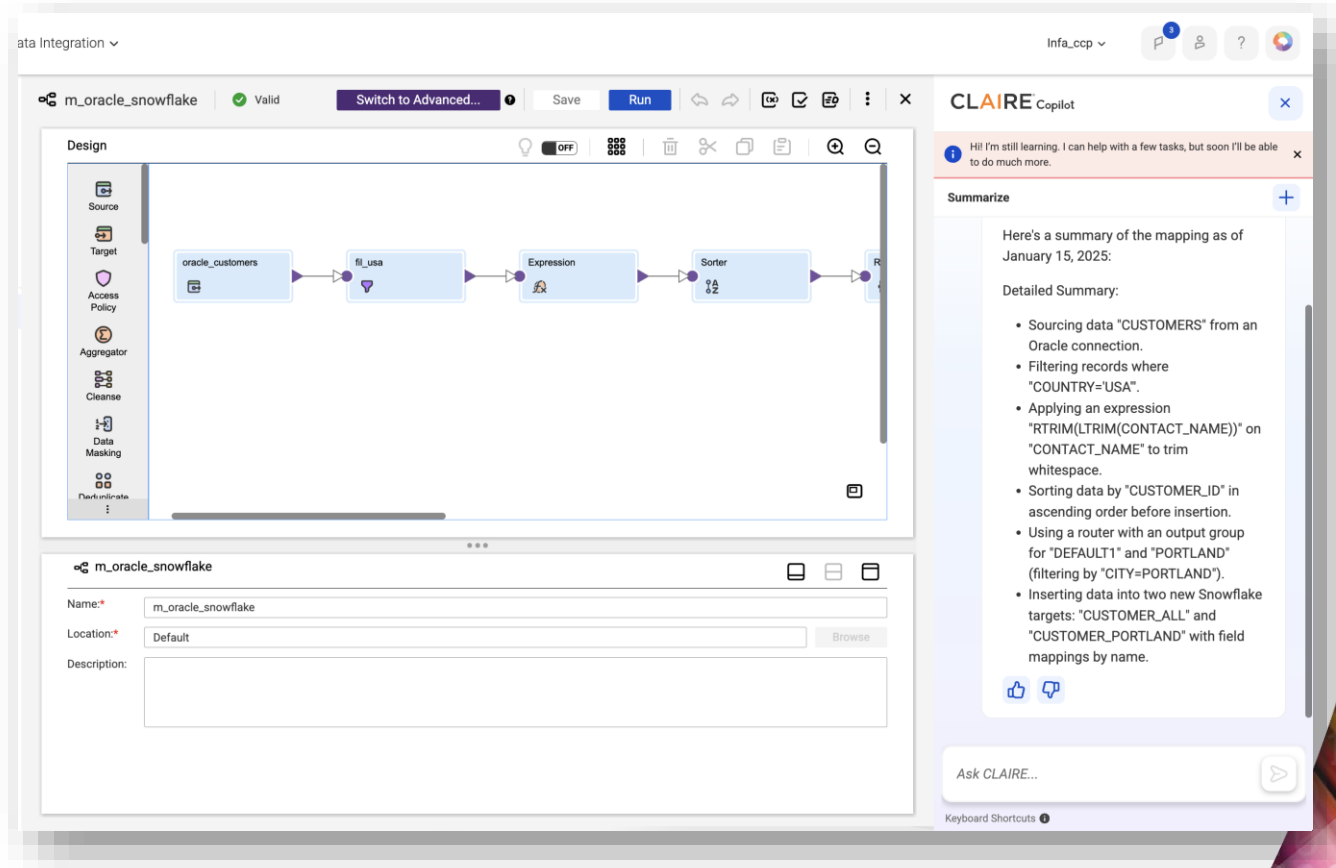
- Generating mapping descriptions based on the business, technical and syntactical context

Benefits

- Enforce best practice across organization
- Identify what a mapping does without breaking a sweat
- Identify what you have and make it easy for your users

Who should use it?

- Data Engineer, Data Architects, Testers, Data Analysts



The screenshot displays the Informatica Data Integration (DI) interface. The main window shows a mapping design for 'm_oracle_snowflake'. The design includes a source connector 'oracle_customers', a filter 'fil_usa', an 'Expression' connector, a 'Sorter', and a router. The interface also shows a metadata pane with fields for Name, Location, and Description. On the right, the 'CLAIRE Copilot' chat window is open, displaying a summary of the mapping as of January 15, 2025. The summary includes a detailed description of the mapping's logic, such as sourcing data from an Oracle connection, filtering records where 'COUNTRY=USA', applying an expression to trim whitespace, sorting data by 'CUSTOMER_ID', and inserting data into two new Snowflake targets: 'CUSTOMER_ALL' and 'CUSTOMER_PORTLAND'.

Here's a summary of the mapping as of January 15, 2025:

Detailed Summary:

- Sourcing data "CUSTOMERS" from an Oracle connection.
- Filtering records where "COUNTRY=USA".
- Applying an expression "RTRIM(LTRIM(CONTACT_NAME))" on "CONTACT_NAME" to trim whitespace.
- Sorting data by "CUSTOMER_ID" in ascending order before insertion.
- Using a router with an output group for "DEFAULT1" and "PORTLAND" (filtering by "CITY=PORTLAND").
- Inserting data into two new Snowflake targets: "CUSTOMER_ALL" and "CUSTOMER_PORTLAND" with field mappings by name.

Use cases & Best Practices

Examples from our customers

Create the first draft of the mapping and then use it to modify.
Faster 0-1 mapping generation

1

2

Replicate common patterns using natural language – *create copies of the same prompt and run recursively*

Empowering non-technical users to self service ingestion –
Data Analyst creates the data ingestion and replication task using NL

3

4

Generate short and detailed summaries of mappings saving time and energy to identify the details of the mapping.

DEMO

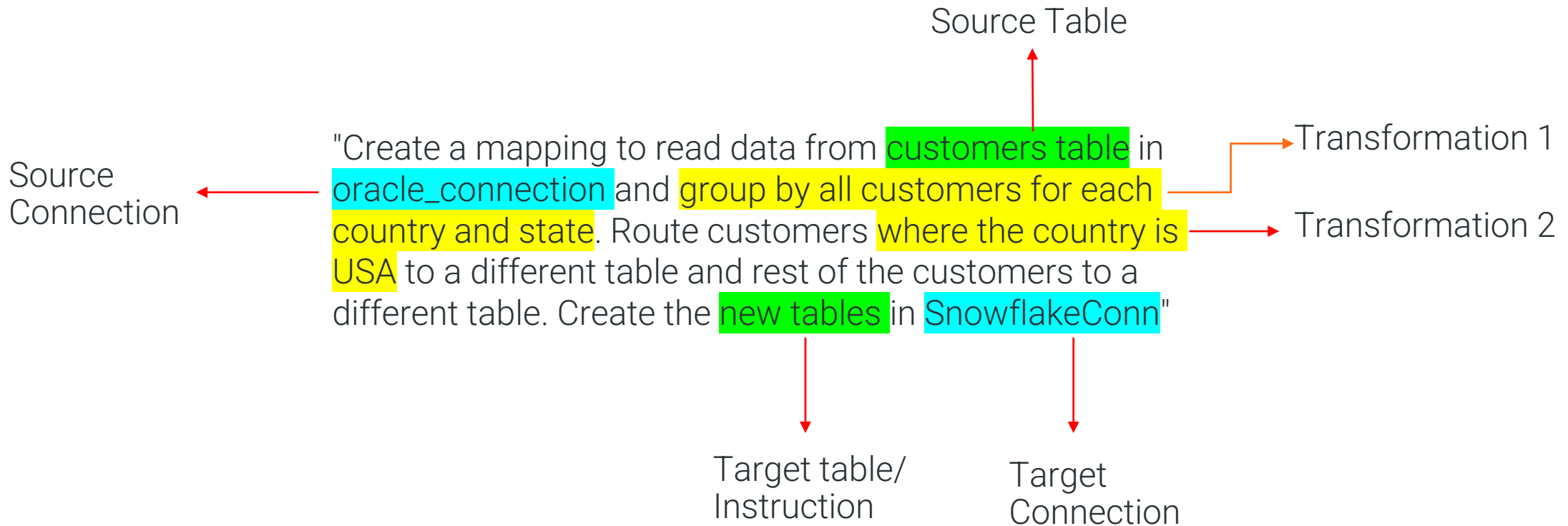
CDI CoPilot



Structure a prompt - CDI

To create a functional CDI Mapping

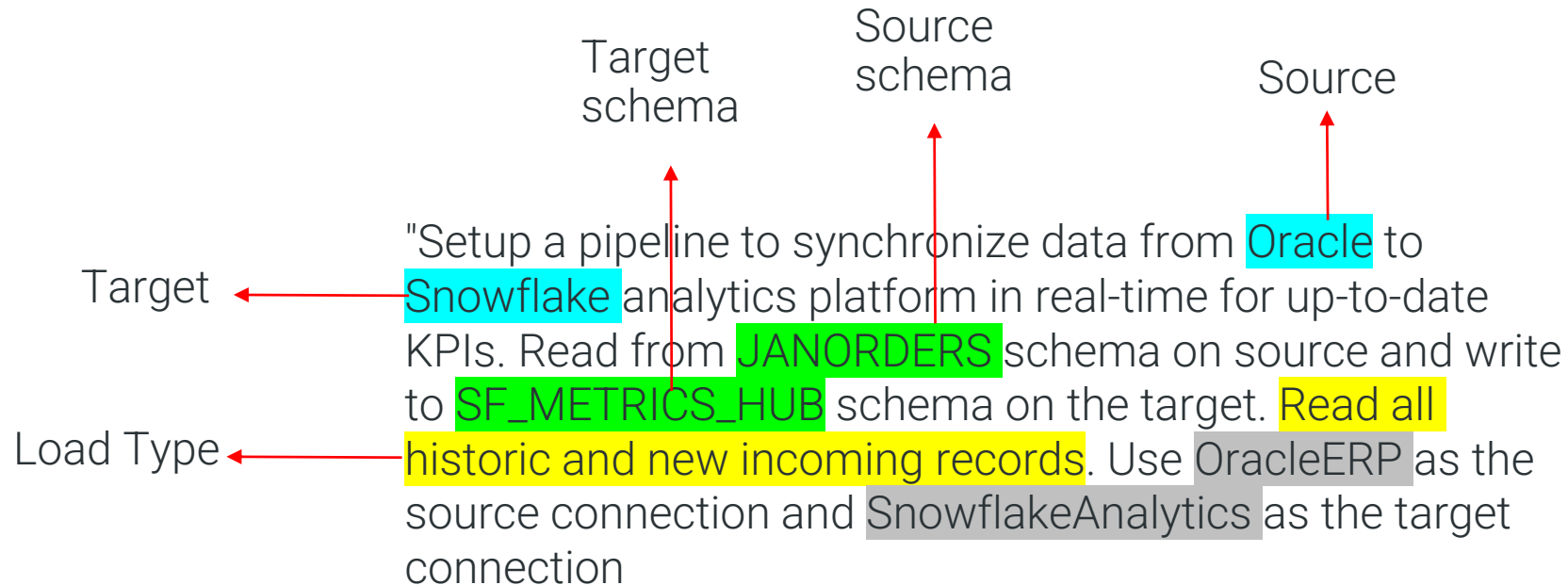
- Provide a clear intent
- Provide the connections and object details (copilot will ask if it cannot identify)



Structure a prompt - CDIR

To create a functional CDIR Task

- Provide a clear intent
- Provide the source and target names, connections and schema details



Autonomous Asset Generation

Dos and Don'ts

Dos

- Provide clear intent in the first prompt itself and sufficient details
- Provide the connection and table details
- Creates only mappings, DBMI and APP MI tasks
- Needs a little prompt engineering in V1 (Roadmap is to make this easier)
- Conversation is tied to a mapping (you cannot create multiple assets in 1 conversation yet!)

Don'ts

- Ambiguous prompts
- Unsupported assets
 - Mapping tasks, taskflows, etc cannot be created yet
- Product Help prompts
- Non Informatica related prompts

Mapping Descriptions and Summarizations

Dos and Don'ts

What works today

- Business and detailed summary
- Only Mappings (CDI, Adv DI)

Roadmap

- CDIR task summarization
- Other types of mappings and tasks

Prompt Examples

Summarize this mapping

Show a detailed technical summary

Explain this mapping

CLAIRE in Cloud Application Integration (CAI)

- Natural Language Creation: Users describe data flows, and CLAIRE configures the process automatically.
- Supports major SaaS connectors like Salesforce, ServiceNow, Marketo, Microsoft Dynamics 365, and more.
- Summarizes existing processes with both high-level overviews and step-by-step details.
- Generates XQuery expressions for process transformations.
- Answers user questions and provides documentation guidance.

CLAIRE in CAI

CLAIRE Copilot can create processes using the following connections:

Amazon Bedrock

Azure OpenAI

Coupa

Gemini

Jira

Marketo

Microsoft Dynamics 365

NetSuite

OpenAI

Salesforce

ServiceNow

Published service connectors

New Features- Latest Release

- CDI: In-context Expression Generation using Natural Language and Pseudocode
- CDIR: Generate brief and detailed summaries for DBMI and APPMI assets
- CDIR: Table selection rules using natural language for DB and APPMI assets
- CAI: XQuery expression generation
- CAI: Extended support for JIRA App Connector and Generic Service Connector
- CAI: Asset summarization enhancements with brief and detailed summary

Want To Learn More?

Helpful Links

Videos & Docs

- [Data Integration Co Pilot](#)
- Cloud Application Integration:
 - [Sample Prompts](#)
 - [Example Prompts](#)
- [CAI Co-Pilot](#)
- [CDI / CDI\(R\) Co-Pilot](#)
- [FAQs for CLAIRE CoPilot - CDI, CDIR and CAI](#)
- [Claire CoPilot: Informatica CLAIRE: AI Co-Pilot in IDMC](#)

Content

- [EU AI Act Blog](#)
- Cloud Data Integration:
 - [Sample Prompts](#)
 - [Improving Prompts](#)
- Cloud Data Ingestion and Replication:
 - [Sample Prompts](#)
 - [Examples DB and Replication Tasks](#)
 - [Example App Ingestion and Replication Tasks](#)



Thank You!

Questions?

Where data & AI come to **LIFE**