Informatica
from Salesforce

06 Jan, 2026

# Unlock AI-Driven Cloud Integration Insights with CLAIRE Copilot


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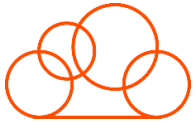
Where data & AI come to LIFE

# Housekeeping Tips

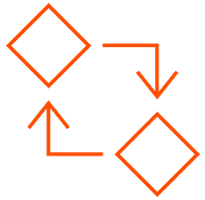
- Today's Webinar is scheduled for 1 hour
- The session will include a webcast and then your questions will be answered live at the end of the presentation
- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to "All Panelists" via 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

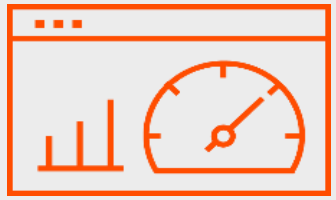


Product Learning Paths and Weekly Expert Sessions

Informatica Concierge

Tailored training and content recommendations

# More Information



## Success Portal

https://success.informatica.com

## 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

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# Introduction to CLAIRE & CLAIRE Copilot

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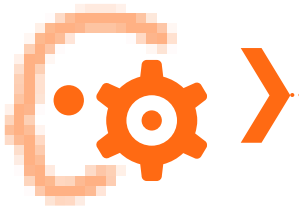
# What is CLAIRE®?

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



**Informatica AI/ML**
Large Language Models (LLMs)

**119 Trillion Customer Transactions per Month***


- **Recommendations**
- **Automation**
- **Insights**

Intelligent Data Management Cloud™

*As of date, Dec 31, 2023

# 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*

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# Architecture of CLAIRE – How It Works

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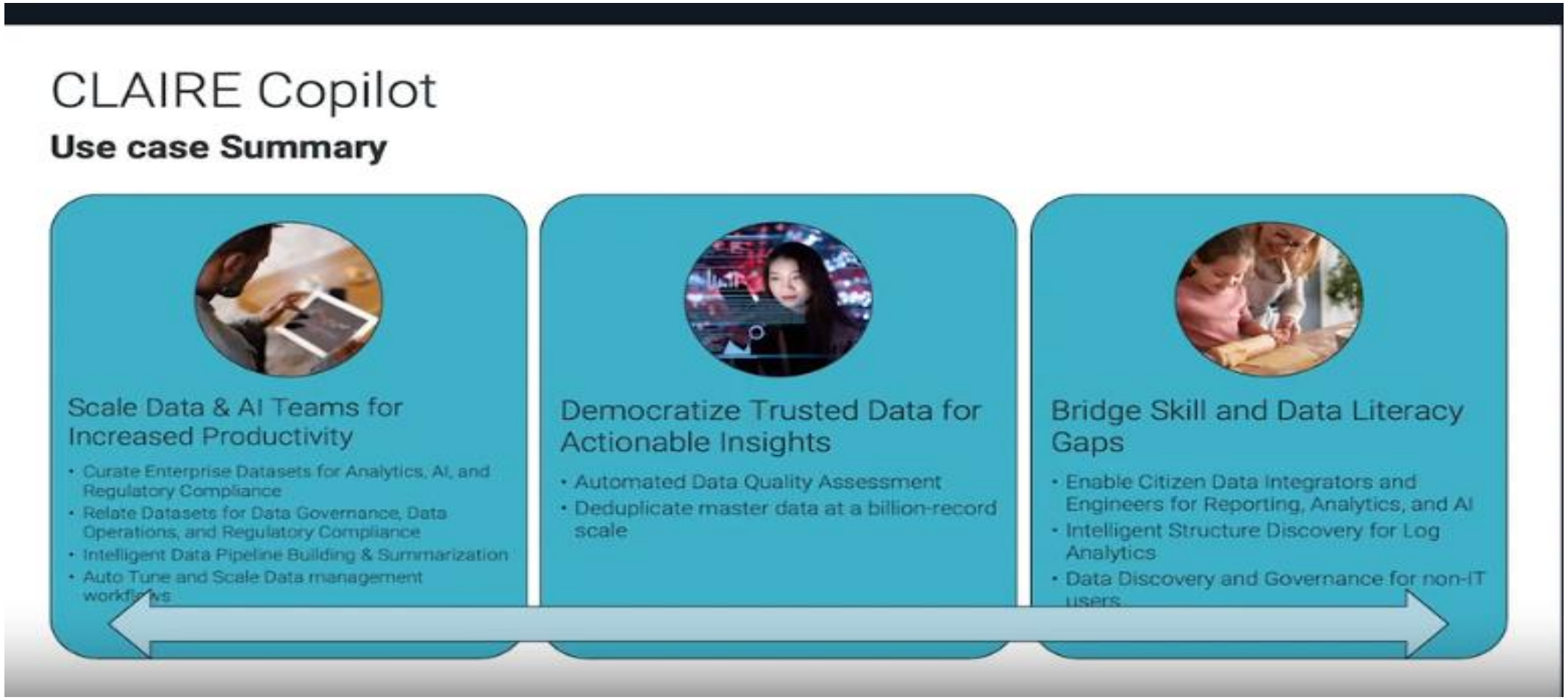
# How CLAIRE Operates

- 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.

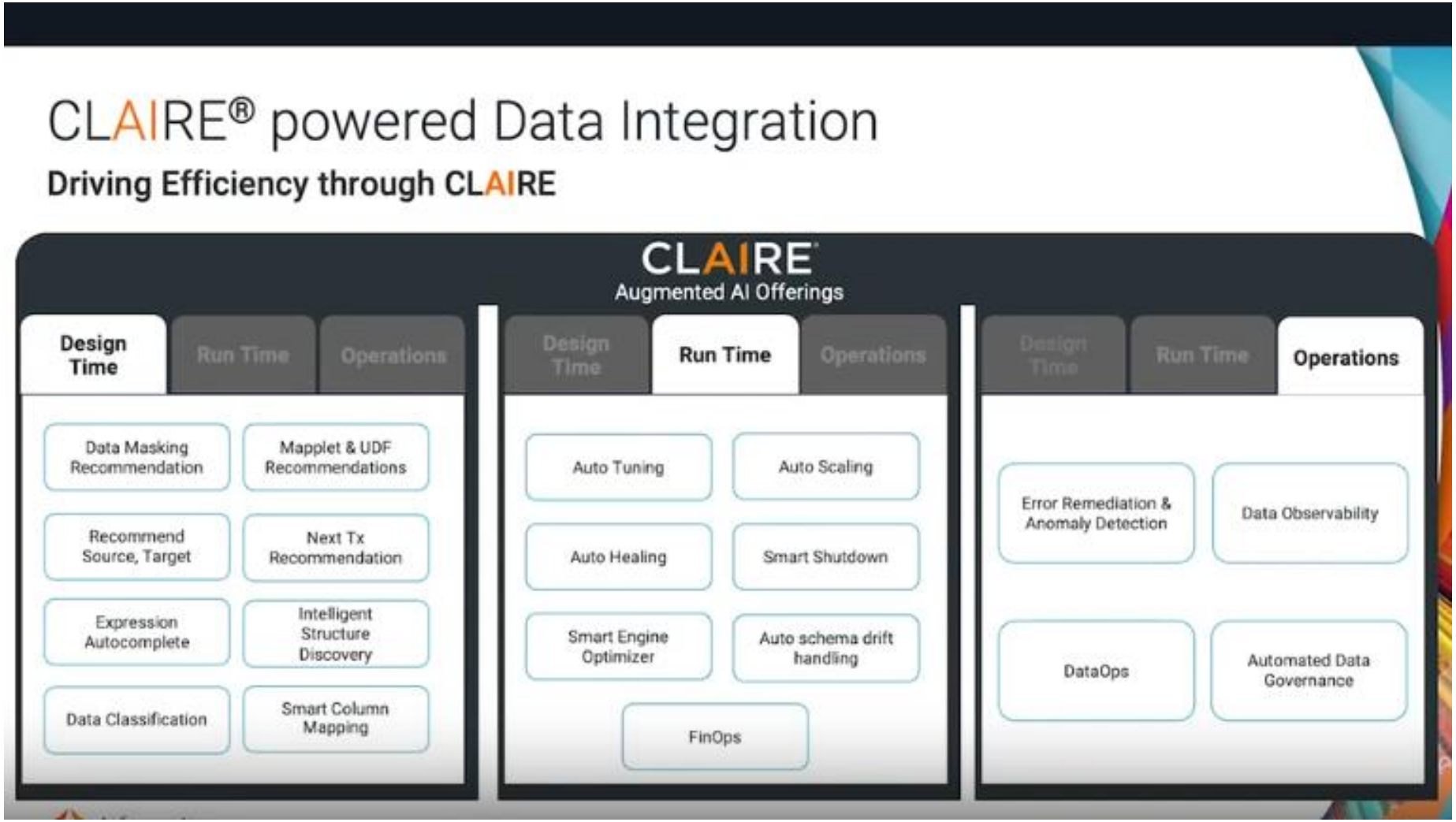
# CLAIRE Integration Points

- 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



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# CLAIRE for CDI, CAI, and CDIR

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# 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

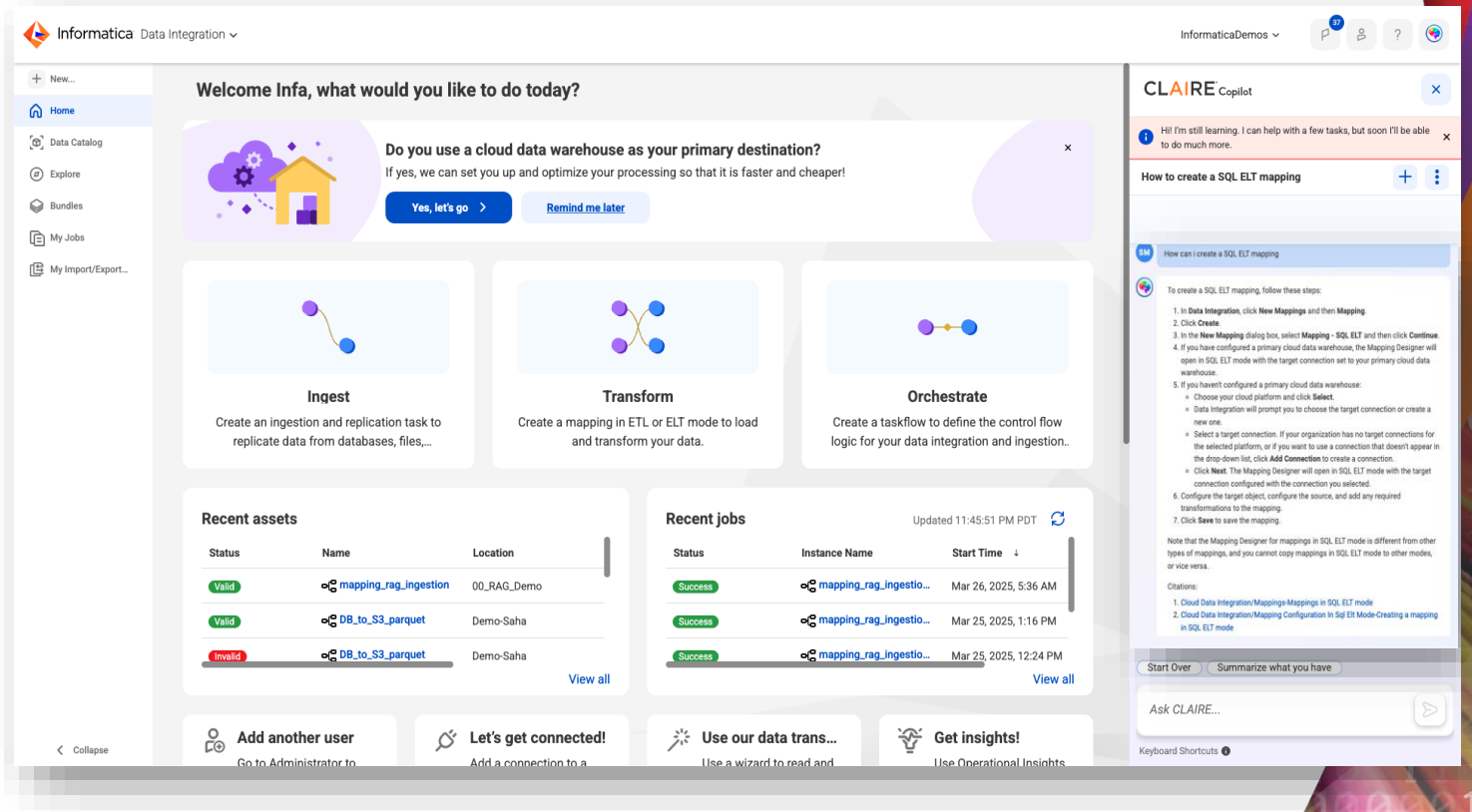
- Ask for help on any products or services offered by Informatica
- Find out responses to your questions by leveraging info available in the INFA documentation portal, KB articles, and How-to-articles

### Benefits

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

### Who should use this?

- New Data Engineers, Data Analysts, Architects

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# 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

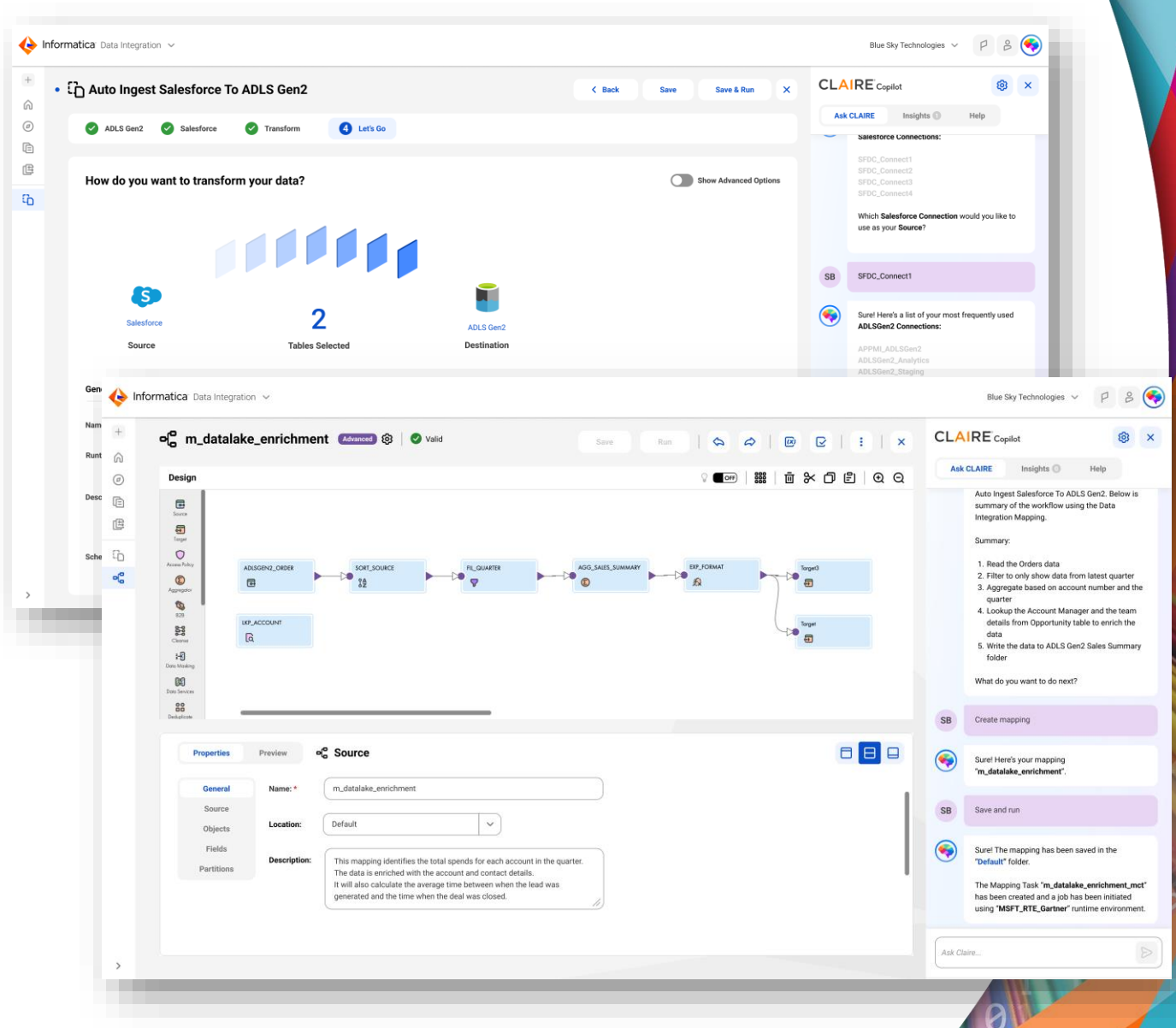
- Generate **mappings** and **Mass Ingestion tasks** (CDIR) using Natural Language
- Interactive interface to enable appropriate functionally complete ingestion assets and mappings

### Benefits

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

### Who should use this?

- Data Engineers, Data Analysts

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# Mapping Descriptions and Summarizations

## What it can do today

### Feature

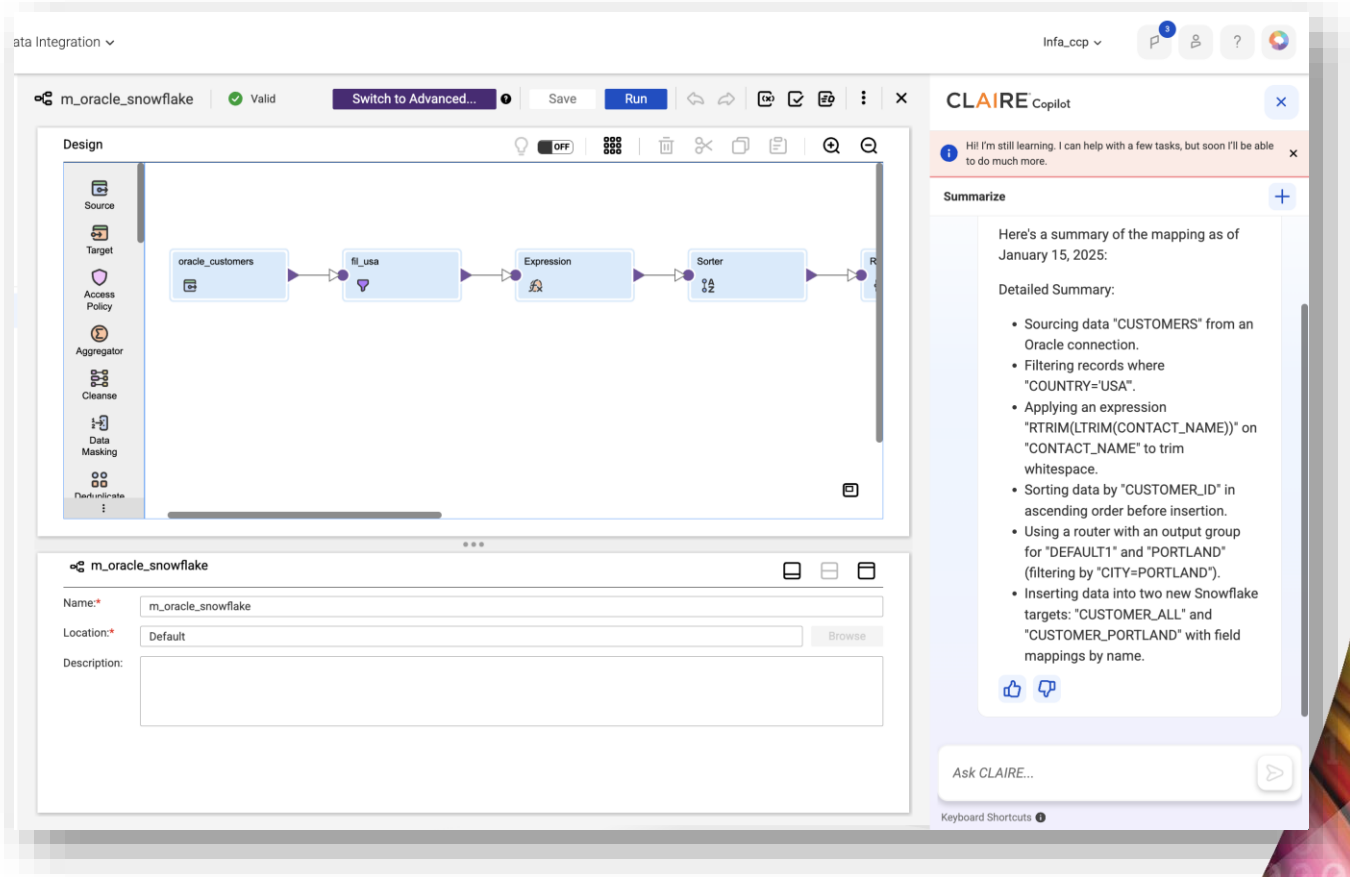
- Generating mapping descriptions based on the business, technical and syntactical context

### 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

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# Use cases & Best Practices

## Examples from our customers

1. Create the first draft of the mapping and then use it to modify. *Faster 0-1 mapping generation*
2. Replicate common patterns using natural language – *create copies of the same prompt and run recursively*
3. Empowering non-technical users to self service ingestion – *Data Analyst creates the data ingestion and replication task using NL*
4. Generate short and detailed summaries of mappings saving time and energy to identify the details of the mapping.

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# DEMO

CDI CoPilot


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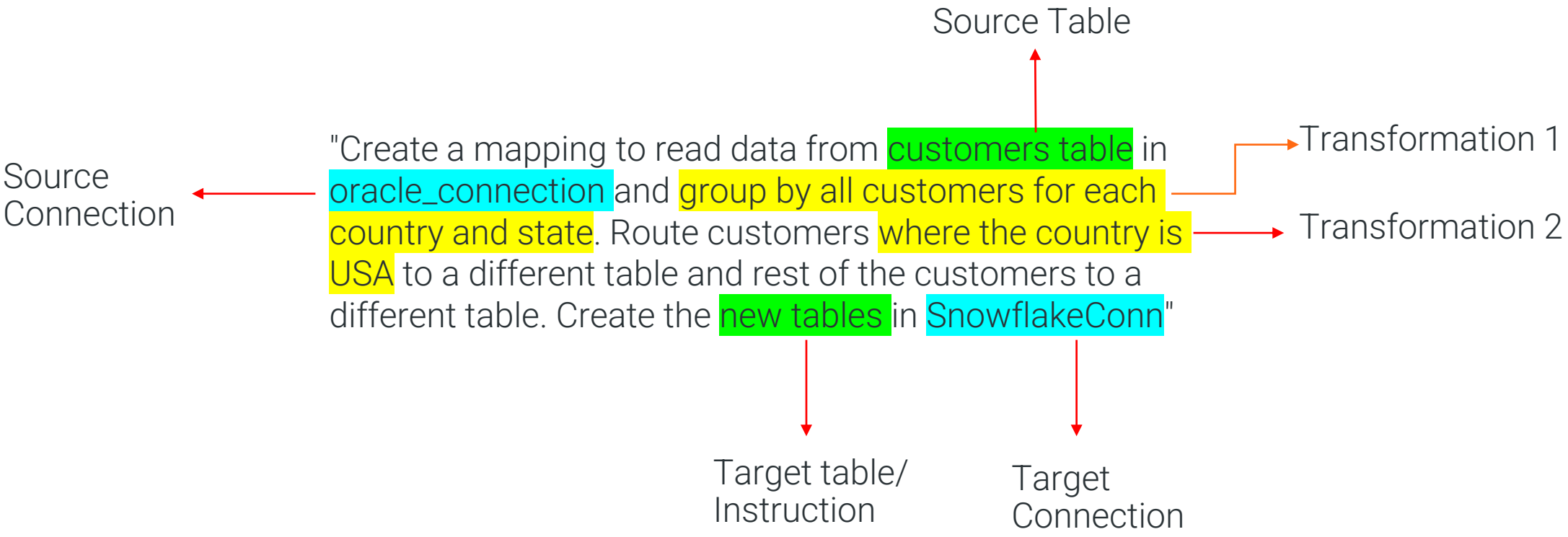
# Structure a prompt - CDI

## To create a functional CDI Mapping

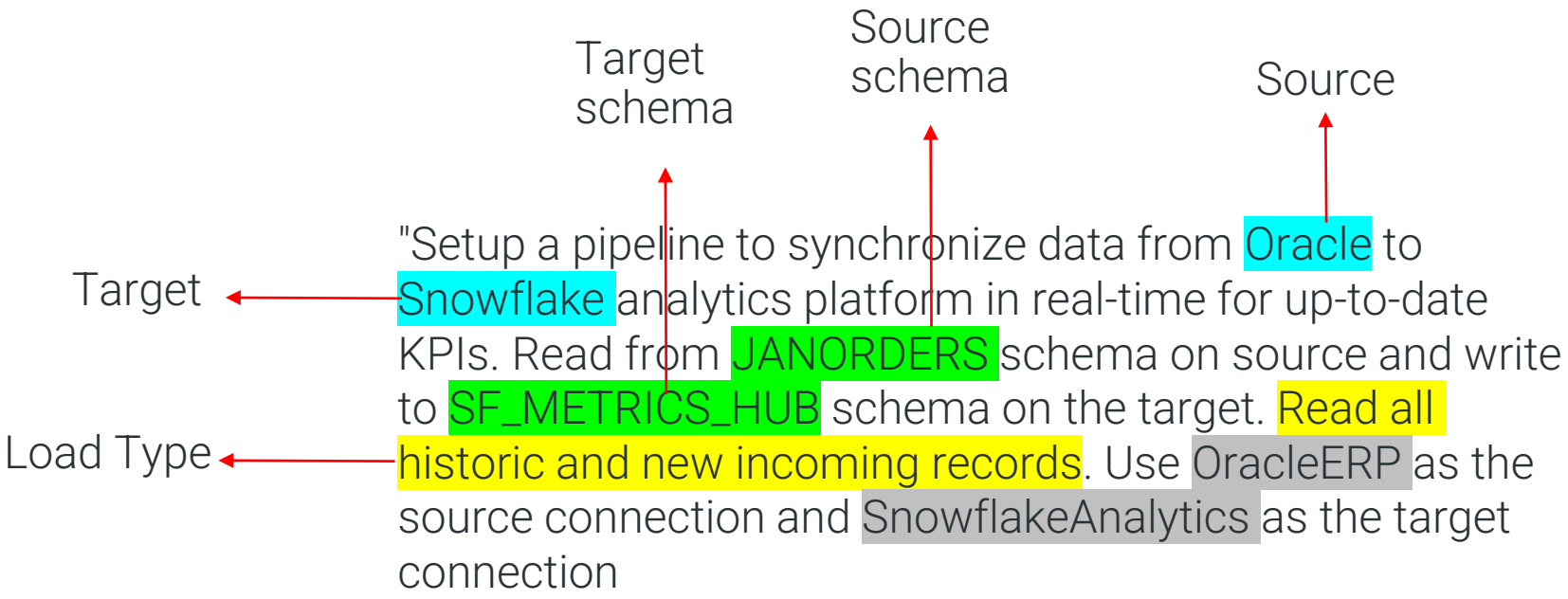
- Provide a clear intent
- Provide the connections and object details (copilot will ask if it cannot identify)



# 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?

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