

precisely

Thank you for Joining!

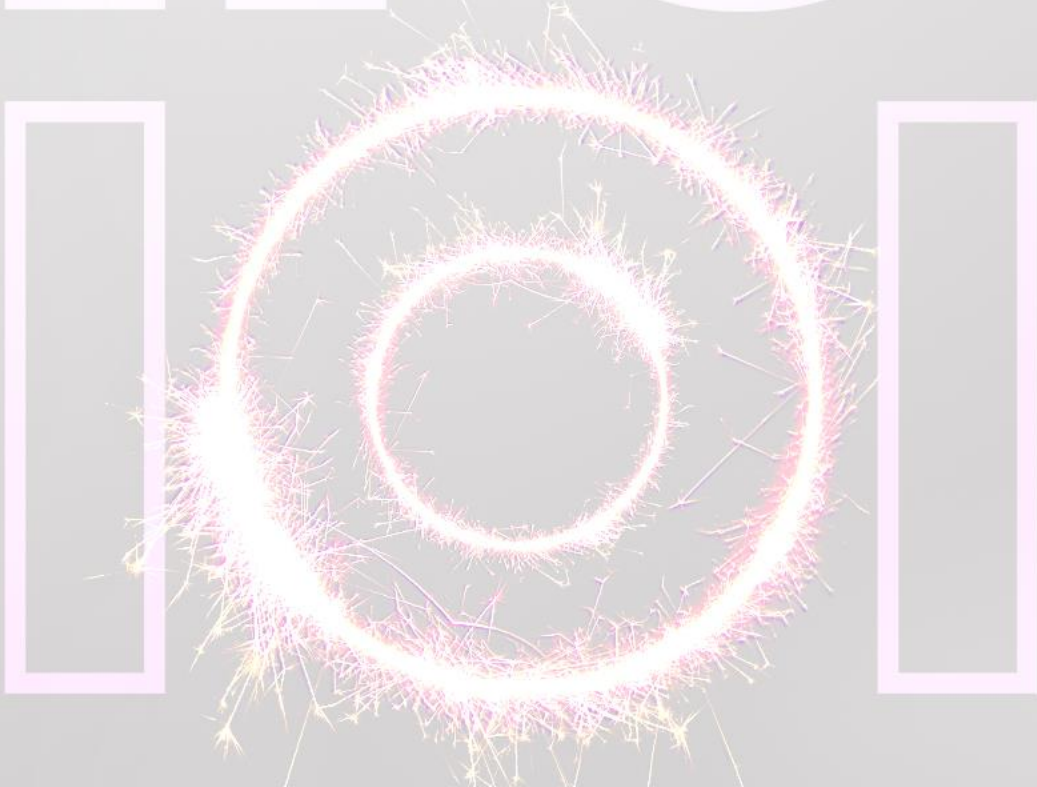
The session will begin at 10:00am ET



precisely

Trillium User Group

September 25, 2025



Welcome to the Trillium User Group!



ON24 Interface Overview

The screenshot displays the ON24 interface with a purple and white color scheme. The background features a repeating pattern of large, stylized letters 'O' and 'N'. The interface is divided into several sections:

- Presenters:** A large white rectangular area on the left side of the top row, containing the text "Presenters".
- Thank you for joining!:** A large white rectangular area on the right side of the top row. It features the "precisely" logo in purple, the text "Thank you for joining!" in bold black, and "The session will begin at 10:00am ET" below it. To the right of the text is a photograph of a smiling woman with curly hair and glasses, wearing a purple sweater and a pink scarf, holding a smartphone. A glowing pink circular aura surrounds her phone.
- Chat:** A white rectangular area on the left side of the bottom row, containing the text "Chat". Below the text is a text input field with a smiley face icon on the left and a send icon on the right, with the placeholder text "Send a message".
- Q&A:** A white rectangular area on the right side of the bottom row, containing the text "Q&A". Below the text is a text input field with the placeholder "Enter your question" and a "Submit" button.
- Navigation/Links:** A white horizontal bar at the bottom right of the interface, containing four links with icons: "Trust '25", "Precisely Knowledge Community", "Precisely Resource center", and "AI Isn't the Mystery — Your Data Is".
- Bottom Bar:** A dark purple horizontal bar at the very bottom of the screen containing several icons: a play button, a list icon, a smiley face, a speech bubble, a hand pointing, and a person icon.
- Powered by ON24:** A small logo in the bottom right corner of the interface.

Agenda

1

**Overview of Trillium
Support Options**

***Matt Malczewski,
Precisely***

2

**TSQ Real-Time &
Deployment Demo**

***Dennis Sam,
Precisely***

3

Trillium Tips & Tricks

***Mike Sisolak,
Precisely***

4

**Announcements &
Updates**

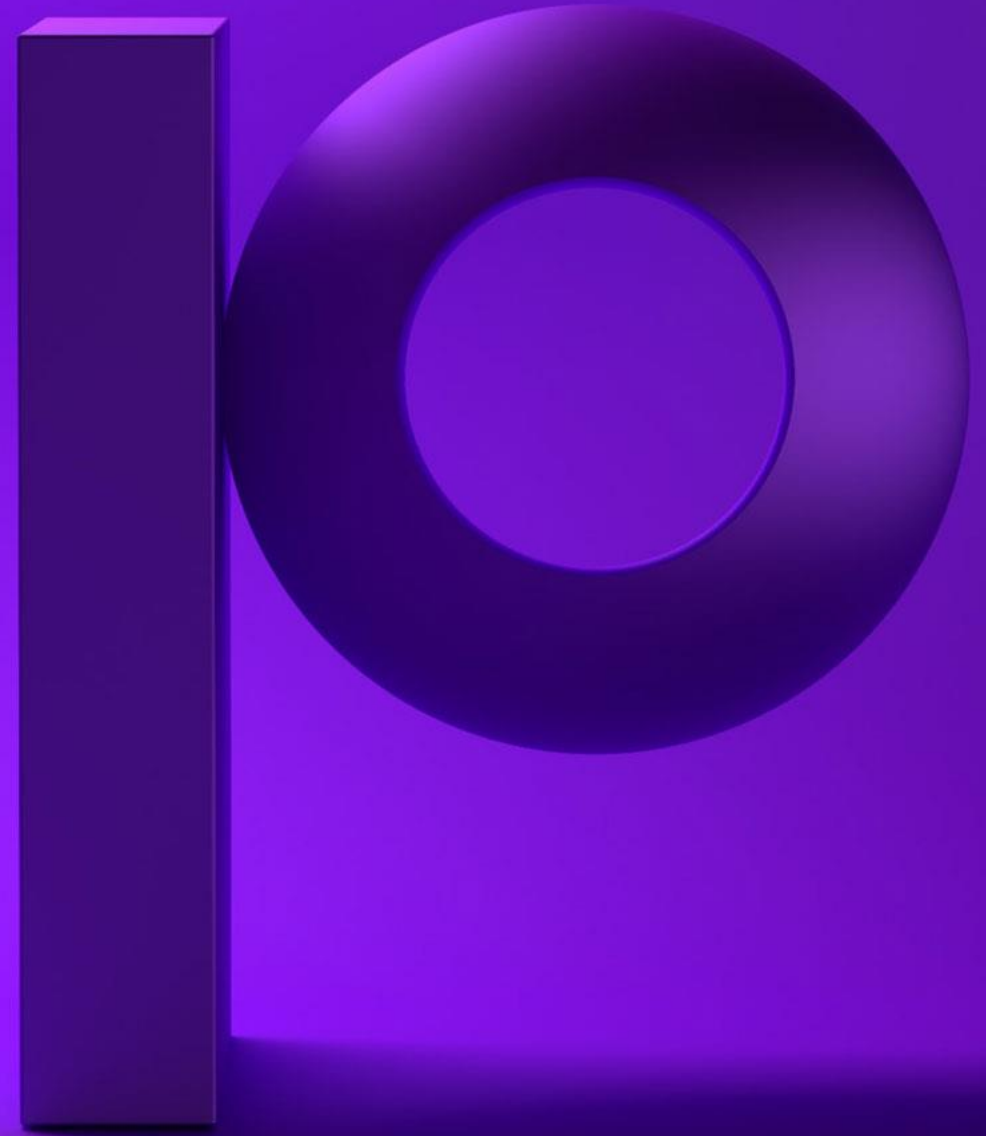
***Matt Malczewski,
Precisely***

precisely

Overview of Trillium Support Options

Matt Malczewski |
Customer Programs
Manager, Precisely

September 25, 2025



Introducing: Generative AI Within Support



Contact Support

Case management

Our [Customer](#) and [Partner](#) portals provide the ability to self-serve via AI-powered searches and to submit, update and monitor your cases.

Severity 1 Critical Issues must be reported by [phone](#).

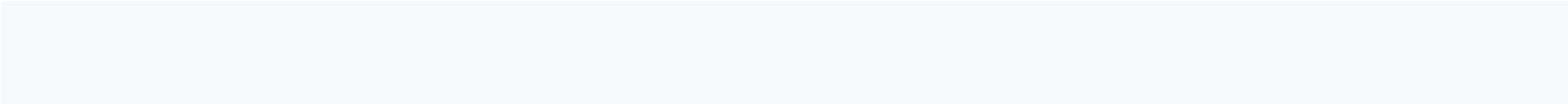
[Customer case form](#)

[Partner case form](#)

Self-service registration

Need a login to raise Support cases? We now provide self-service registration to raise and monitor your own cases in our customer portal.

[Register](#)



Introducing: Generative AI Within Support

Contact Customer Support

Tell us how we can help.

Please [login](#) in order to submit a case, or perform a search to find answers within our documentation and knowledge base.

• What can we help with? ⓘ

🔍 Trillium

Search

Recommended Solutions

 Knowledge  Jun 6, 2025

Trillium - General Software Lifecycle

Product Release ... Customers can download the latest Trillium software from Precisely's Data Experience Portal. ... The following table outlines the support status of the Trillium product:

 Knowledge  Sep 5, 2025

Trillium - Name Standardization

... rules/function and error messages that are triggered that Trillium uses? ... Does Trillium check each name attribute separately - ie. First name, middle initial, middle name, last name, ...

 Community  Aug 27, 2025

Trillium Quality and Discovery Version 18.0 New Release

Trillium Product Announcements Trillium Quality and Discovery Version 18.0 New Release ... Trillium product documentation is now available in the Precisely Help Center.

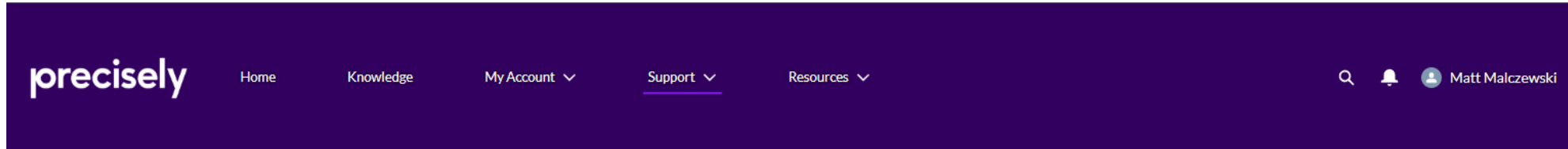
Section: Trillium Product Announcements

 Documentation Aug 8, 2025

SAP Address Management - trillium_quality - Latest

Trillium for SAP customization options include the following IMG activities (see Address Management with Trillium ... Change message control for Trillium(Change Message Control for Trillium)

Enhanced Self Serve Support Case Creation



Contact Customer Support

Tell us how we can help.

You've told us your issue is:
Area: **Technical Assistance**
Statement: **I'd like help and how-to assistance**

Support Site and Product

* Support Site
Precisely Software Inc. - 61698 - Main Site

* Product
Trillium DQ

* Product Current Version
17

* Brief headline summary
Help Installing

* Full details of your request
I'm having issues installing Trillium, assistance would be appreciated

Supporting documentation? Check this box, you will be asked to upload the file later.

[Previous](#) [Next](#)

Recommended Solutions

Generated answer



Installation Assistance

To assist you with the installation process, follow these general steps based on the type of product you are installing:

For QuickEDD-Installer

1. **Select Options:** Depending on the package, choose the necessary options for installation or upgrade.
2. **Installation Type:**
 - **Remote (IBM i):** Commands will execute on the remote server.
 - **Extract SAVF (Local):** Extract the SAVF file to a local folder for manual installation.
 - **Multi-platform:** Choose between IBM i, Linux, or Windows based on your server setup.

[Show more](#)

Generated content may contain errors. Verify important information.

Documentation

Aug 7, 2025

Installation - Latest

Installer Execution Screens During the installation of Worker, you will move through ... If you have already installed the application, the latest version of the Installer will be installed.

Product: Automate Evolve

Knowledge

Aug 26, 2024

Installation.pdf



Trillium Knowledge Community



Trillium

< Share

Register to [Join](#)

Community Home

Discussion **46**

Library **2**

Events **0**

Members **57**

Welcome to the Trillium community! Please feel free to start a discussion in the discussion tab or join in a conversation.

Here are some useful links where you can find more information:

[Product Announcements](#)

[Ideas Portal](#)

Latest Poll

[Add poll](#)

[Stop Rotation](#)

precisely
**Upgrade to USPS
CASS Cycle O**
[Learn how](#)

Latest Discussion Posts



Trillium User Group Meeting: September 25th, 10:00am ...
By: [Matt Malczewski](#) , 4 days ago

Hello All; I'd like to invite you to join us on Thursday, September 25 th at 10:00am EST for the next Trillium User Group (TUG) meeting. The agenda will feature a presentation and demo of TSQ real-time deployment, Trillium usage tips and tricks, ...



AI & Data Integrity - Share Your Insights!
By: [Agata Mardosz-Grabowska](#) , one month ago

As part of our efforts to improve our product s , Precisely's UX team is currently conducting a user research project exploring how AI can support better data integrity. That' s why we'd like to invite you to parti cipate ...



Trillium User Group: April 16th, 2025
By: [Matt Malczewski](#) , 5 months ago

Hi Everyone; I'm pleased to share the registration link and agenda for the upcoming user group meeting taking place at 11:00am ET on April 16th, 2025. We have a great agenda featuring Trillium usage tips, things to consider when upgrading or migration ...



Trillium Asset Archive

precisely

Trillium User Group

Precisely user groups provide an excellent opportunity to share knowledge and learn more about Precisely's solutions from colleagues, peers, and internal experts. Whether a long-time Trillium professional or a new user, this knowledge, this user group is an excellent way to help you get the most out of your Trillium experience.

Through presentations, demonstrations, and networking, you can gain valuable knowledge and grow your professional network. You will:

- Receive an immediate return on your investment
- Be inspired to address common business challenges
- Network with fellow Precisely solution users
- Learn about the latest solution releases

Coming soon, you will find an archive of

Presentation Slides Archive

April 16, 2025: [Trillium User Group Slides](#)

December 4, 2024: [Trillium User Group Slides](#)



April 2025 Meeting

This meeting focused on how to successfully undertake a Trillium migration or upgrade, usage tips and tricks and the development path for Trillium in 2025.

To view the recording, please register through the link below and you will have access to the on-demand video.

[Watch here](#)

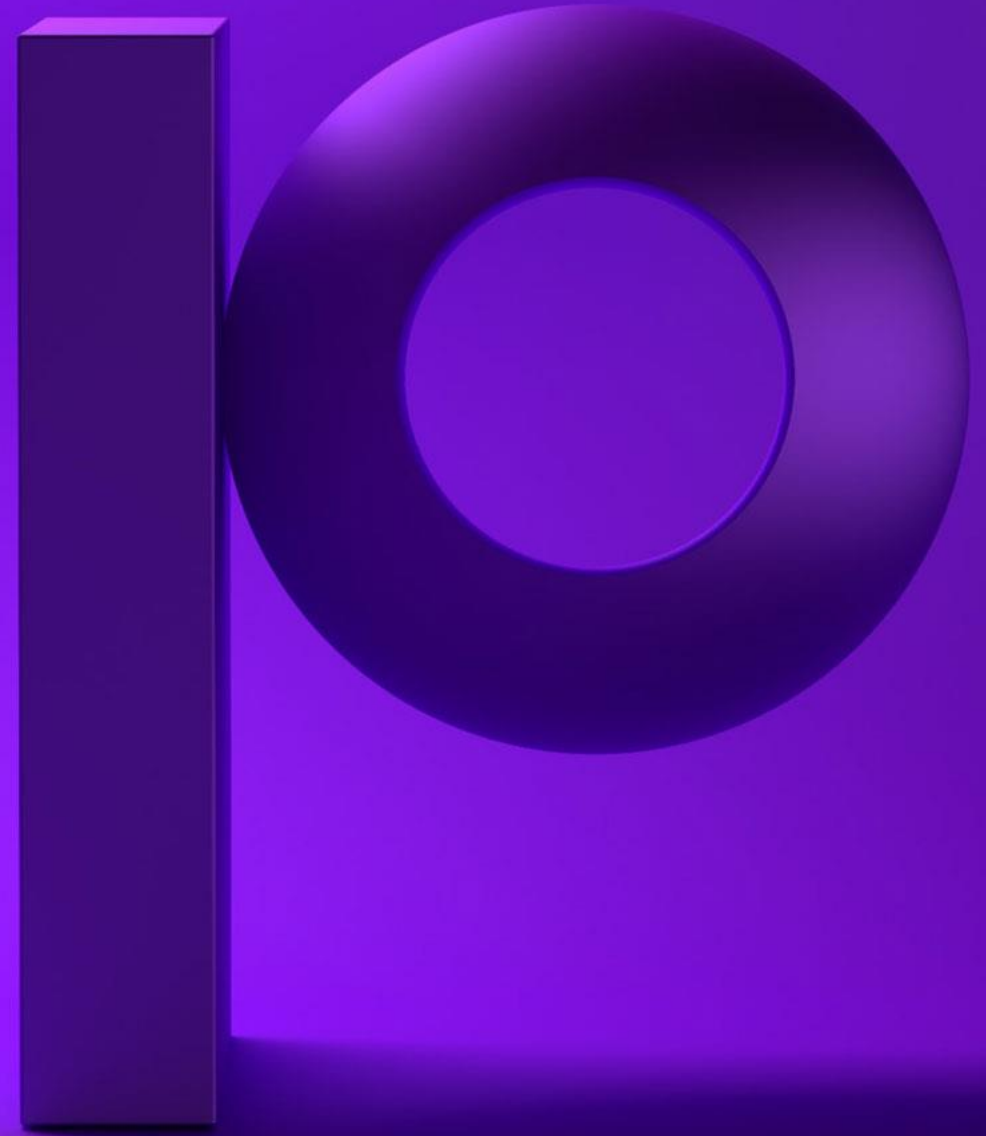


Trillium Real-Time

TSI Deployment Demo

Dennis Sam | Principal
Technical Consultant,
Precisely

September 25, 2025



Types of Real-Time Deployments

Trillium Director

- Legacy real-time application
- Provides transactional load balancing

Trillium Server Interface (TSI)

- REST and SOAP requests
- Transactions processed entirely in memory
- Security certificates in Apache Tomcat

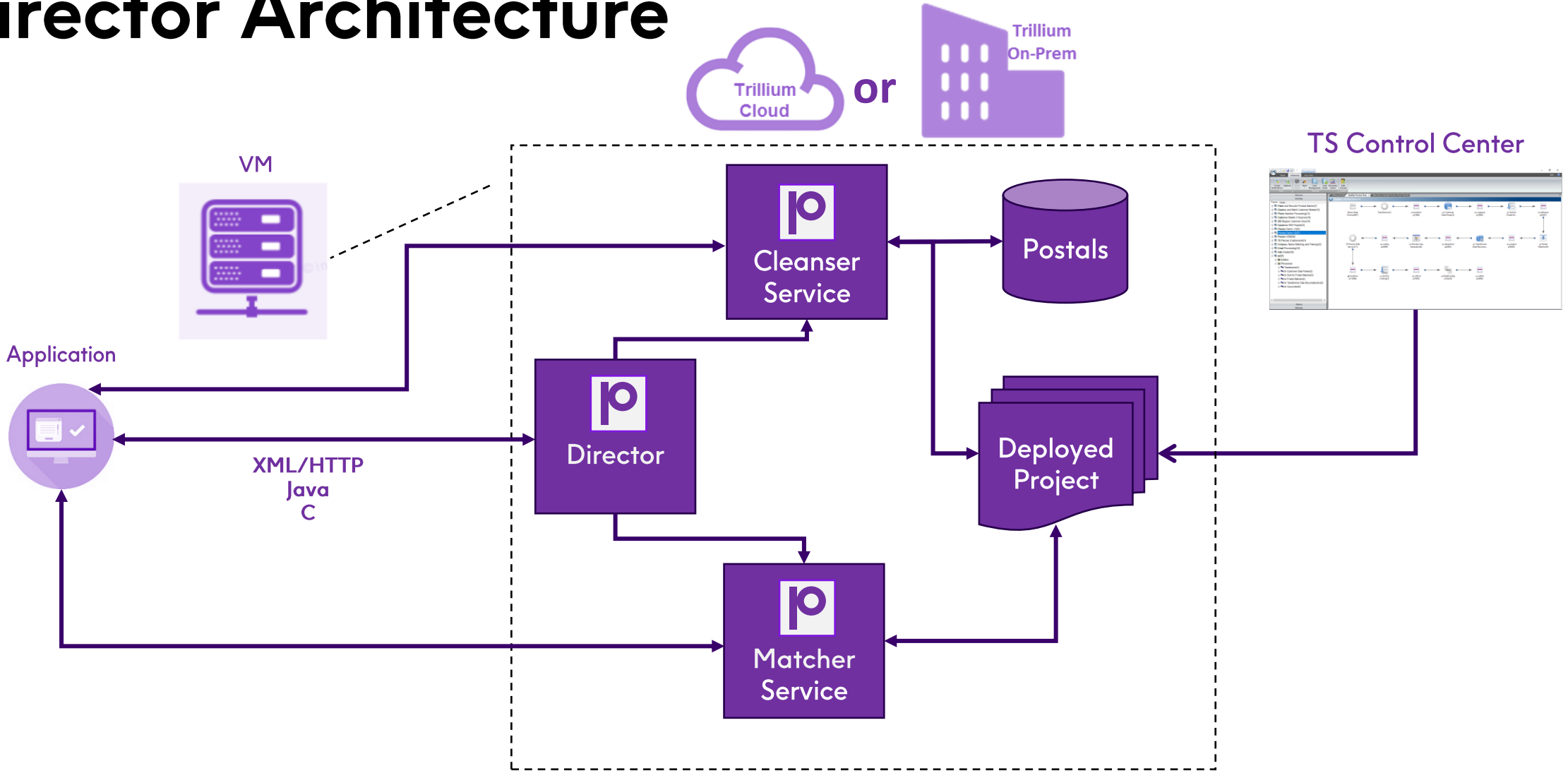
Trillium for SAP

- Works with ERP, CRM, CRM WebClient
- Invoked at BASIS/WAS layer using Business Add-Ins
- Installed as an SAP Add-on
 - BC-BAS-PV for postal validation
 - BC-BAS-DES for duplicate check and search
- Director deployment

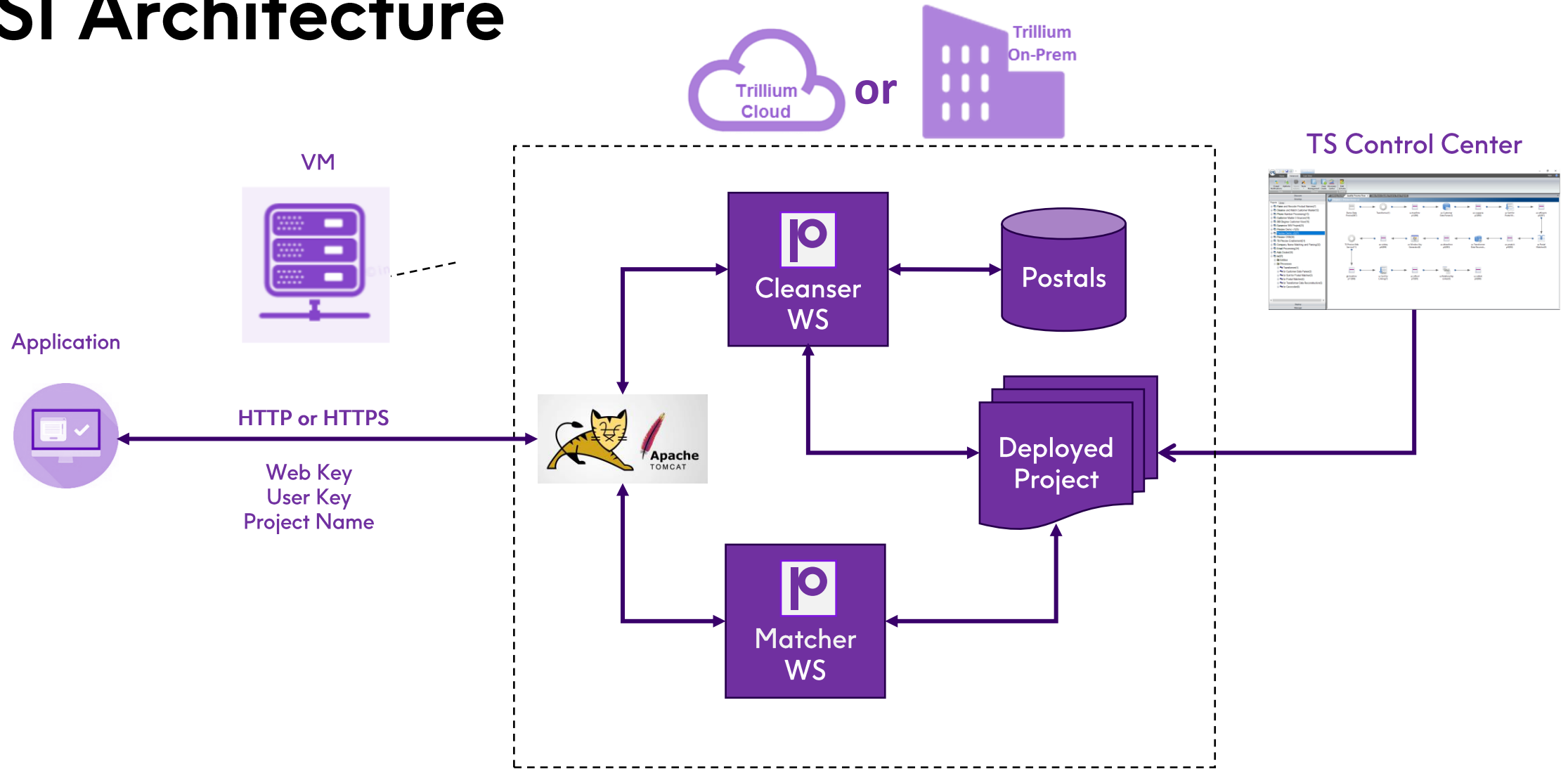
Trillium for Dynamics

- MS Dynamics plug-in 2.8.1 works with Dynamics 365 v9.2 online (on-prem support in later release)
- Pre-defined cleansing/matching for 230+ countries
- Validates and improves quality of your contact, account, lead, customer address, and,
- TSI deployment

Director Architecture

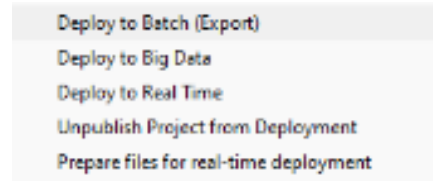


TSI Architecture

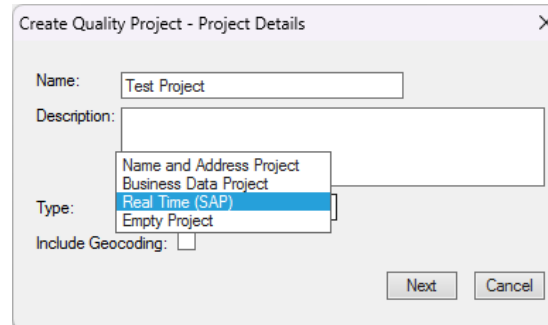


Configuration

- **Configure once, deploy anywhere**



- **Template Real-Time Project**

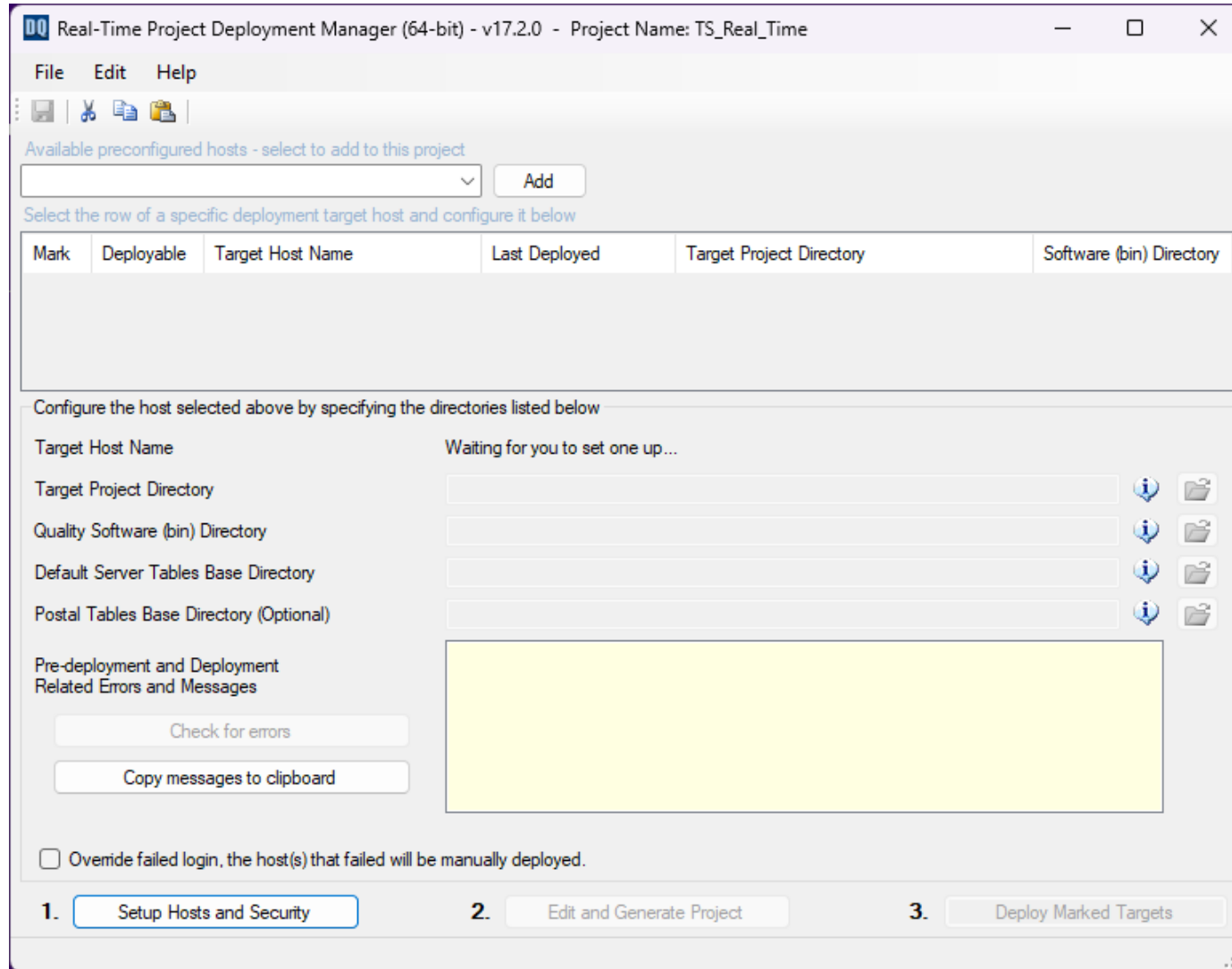


- **Some batch modules not used in transactional processing**
 - Sorting
 - Set Selection
 - File Update
 - Merge/Split

Deployment Tools

- Deployment Manager
- Director System Manager
- Web Services Manager

Deployment Tools



Deployment Tools

The screenshot shows the Director System Manager interface. On the left, a tree view displays the network structure: My Director Network > Director > Cleanser > RMatcher. The main area contains a table with the following data:

System	Server	Status	Host	Port	PID	Pool Size	Available	Requests	Successful	Failed	Releases	Trace
*	Director		WIN-2HBJP4RTRRA	17400	14364							False
G	Cleanser	Active	WIN-2HBJP4RTRRA	17410	20980	128	128	0	0	0	0	False
G	RMatcher	Active	WIN-2HBJP4RTRRA	17412	6944	128	128	0	0	0	0	False

At the bottom left, there are tabs for 'Realtime View' and 'Service Directory'.

Deployment Tools

Administration Home

Project Configuration

Web Access Configuration

Cleanse Count

View TSI Web Log

Project Configuration

Logout Back to Apache

Define TSI Web Server Accessible Project(s)

Projects TEST - Project Log

Project Properties File: C:\Program Files\Trillium Software\MBSW\17\tsq\Software\apache-tomcat\conf\trillium_projects.properties
Project Path: C:\temp\TS_Real_Time
Start Time: N/A

Project: TEST Add New Project Add Default Project

Project limit reached (1 project maximum)

Column Name	SOAP	REST	Total
Number Cleanses	0	0	0
Average time per cleanse	N/A	N/A	N/A
Fastest cleanse time	N/A	N/A	N/A
Number of window matches	0	0	0
Number of reference matches	0	0	0

Start Edit Remove

Deployment Tools

The screenshot shows the Web Service Manager (64-bit) - v17.2.0 interface. The main window is titled "Web Service Manager (64-bit) - v17.2.0" and has a menu bar with "File", "Edit", and "Help". Below the menu bar is a toolbar with various icons. The main area is divided into several tabs: "Cleanser Input / Output Fields", "Matcher Input / Output Fields", "Web Service Testing", and "Server Configuration". The "Web Service Testing" tab is active, and the "Matcher" sub-tab is selected.

The "Cleanser" section shows an XML request body with the following structure:

```
<s:Envelope xmlns:s="http://schemas.xmlsoap.org/soap/envelope/">
  <s:Header>
    <Action s:mustUnderstand="0" xmlns="http://schemas.microsoft.com/ws/2005/05/addressing" />
  </s:Header>
  <s:Body xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns="http://soap.web.tsi.trillium.com">
    <CleanseUnicode xmlns="http://soap.web.tsi.trillium.com">
      <webKey?</webKey>
      <projectName>CLEANSE</projectName>
      <inputRecord>
        <trilliumFieldValues xmlns="http://quality.tsi.trillium.com/xsd">
          <trilliumField>LINE_01</trilliumField>
          <trilliumValue>precisley inc</trilliumValue>
        </trilliumFieldValues>
        <trilliumFieldValues xmlns="http://quality.tsi.trillium.com/xsd">
          <trilliumField>LINE_02</trilliumField>
          <trilliumValue>2 folsom</trilliumValue>
        </trilliumFieldValues>
      </inputRecord>
    </CleanseUnicode>
  </s:Body>
</s:Envelope>
```

The "Response" section shows the following XML structure:

```
<ax21:trilliumField>TS_MATCH_LEVEL</ax21:trilliumField>
<ax21:trilliumValue>0</ax21:trilliumValue>
</ax21:trilliumFieldValues>
<ax21:trilliumFieldValues xsi:type="ax21:TrilliumFieldValue">
  <ax21:trilliumField>PR_BUSNAME_RECODED_01</ax21:trilliumField>
  <ax21:trilliumValue>PRECISLEY</ax21:trilliumValue>
</ax21:trilliumFieldValues>
<ax21:trilliumFieldValues xsi:type="ax21:TrilliumFieldValue">
  <ax21:trilliumField>TS_DELIVERY_ADDRESS</ax21:trilliumField>
  <ax21:trilliumValue>2 FOLSOM ST</ax21:trilliumValue>
</ax21:trilliumFieldValues>
<ax21:trilliumFieldValues xsi:type="ax21:TrilliumFieldValue">
  <ax21:trilliumField>TS_CITY_NAME</ax21:trilliumField>
  <ax21:trilliumValue>SAN FRANCISCO</ax21:trilliumValue>
</ax21:trilliumFieldValues>
<ax21:trilliumFieldValues xsi:type="ax21:TrilliumFieldValue">
  <ax21:trilliumField>TS_REGION_NAME</ax21:trilliumField>
  <ax21:trilliumValue>CA</ax21:trilliumValue>
</ax21:trilliumFieldValues>
<ax21:trilliumFieldValues xsi:type="ax21:TrilliumFieldValue">
  <ax21:trilliumField>TS_POSTAL_CODE</ax21:trilliumField>
  <ax21:trilliumValue>941051205</ax21:trilliumValue>
</ax21:trilliumFieldValues>
```

The right side of the window shows the "Web Service Home URI" set to "TrilliumSOAP" and a "Matching Type" dropdown menu. Below these are several buttons: "Clear", "Create Request...", "Load Request...", "Edit Request...", "Save Request", "Save Request As...", "Test", and "View Results..."

The screenshot shows the "Input Cleanser Data" dialog box. It contains a table with the following data:

Field Name	Value
LINE_01	precisley inc
LINE_02	2 folsom
LINE_03	sf ca 94105]
LINE_04	
LINE_05	

Buttons for "Done" and "Cancel" are located to the right of the table.

Demo

precisely

Trillium Tips and Tricks

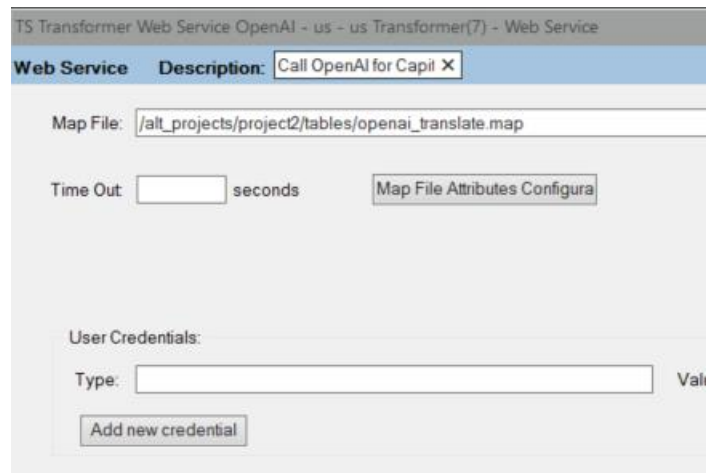
Did you know...?

Michael Sisolak |
Principal Sales Engineer,
Precisely

September 25, 2025



Did you know... Trillium can call AI?



- ...Leveraging a web service call
- This can be:
 - OpenAI
 - Your own model
 - Possible future models included with Trillium

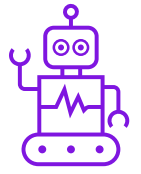
- This can supplement
 - Enrichment
 - Rule creation

Data Rows (Quality Process Flow Project) x								
Or Neighborhood 2	State	Capital City	Capital Address	Capital Population	Openai Response	Ts Field Value 1	Openai Response2	Ts Field Value 2
	MA	Boston	24 Beacon St, Boston, MA 02133	694,583			ボストン	ボストン
	MA	Boston	24 Beacon St, Boston, MA 02133	694,583			ボストン	ボストン
	MA	Boston	24 Beacon St, Boston, MA 02133	694,583			ボストン	ボストン
	MA	Boston	24 Beacon St	694,583			ボストン	ボストン

Did you know...

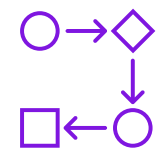
What data quality means to our customers?
It often comes down to remediation...

Automated Remediation



- Cleansing, Standardization, Deduplication, Enrichment
- Roles:
 - Data Quality management
 - IT Management
 - Data Operations

Business Process Remediation



- Identification of quality issues for business process remediation
 - e.g. SSN is incomplete on record
- Roles:
 - Business data steward
 - Analytics
 - Data Science

Bottom Line



Can the data get through our system?

Is the data what the business needs? (Fit for purpose)

Did you know...

How Trillium Quality and Trillium Geolocation are different?

Trillium Quality

- For **ANY** type of data:
 - Access
 - Profile
 - Parse
 - Standardize
 - Correct / Validate
 - Format
 - Match / Dedupe
 - Monitor
 - Enrich

Trillium GeoLocation

ONLY Address validation functions:

- ~~Access~~
- ~~Profile~~
- Parse
- Standardize
- Correct / Validate
- Format
- ~~Match / Dedupe~~
- ~~Monitor~~
- ~~Enrich~~

Note 1 Trillium Geolocation f.k.a. Global Locator

Did you know...

The Trillium UI can be run in a native language...

- Besides English, can you guess how many native languages Trillium UI can be run in?
- The answer is: **9**

- Brazilian Portuguese
- Chinese, Mainland
- Chinese, Taiwan
- French
- German
- Italian
- Japanese
- Korean
- Spanish

Wrap Up

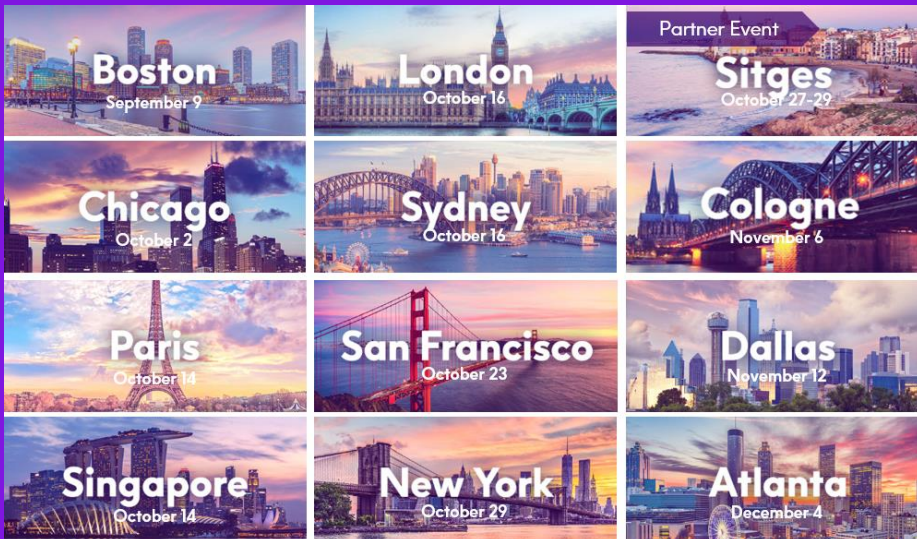
Matt Malczewski | Precisely

Precisely Resource Center

Precisely.com/Resource-center

Precisely Sponsored Webinars & Events

- [AI Isn't the Mystery—Your Data Is](#) (September 16)
- [AI is the Mirror – Fix the Data Before You Face It](#) (October 15)
- September-December: [Data Love Tour](#)



Next Trillium User Group: TBD

PRECISELY IN THE NEWS

[The EU AI Act is here—is your data ready to lead?](#)

How new regulations are reshaping AI adoption

The EU AI Act is driving organisations to address longstanding data management challenges to reduce AI bias and ensure compliance. AI systems under “unacceptable risk” – those that pose a clear threat to individual rights, safety, or freedoms – are already restricted under the Act. Meanwhile, broader compliance obligations for general-purpose AI systems will take effect in August this year. Stricter obligations for systemic-risk models, including those developed by leading providers, follow in August 2026. With these deadlines approaching, organisations must move quickly to build AI readiness, starting with AI-ready data. That means investing in trusted data foundations that ensure traceability, accuracy, and compliance at scale.

In industries such as financial services, where AI is used in high-stakes decisions like fraud detection and credit scoring, this is especially urgent. Organisations must show that their models are trained on representative and high-quality data, and that the results are actively monitored to support fair and reliable decisions. The Act is accelerating the move toward AI systems that are trustworthy and explainable.

Data integrity as a strategic advantage

[Precisely Unveils AI Agents and Copilot for the Data Integrity Suite](#)

[Precisely and Opendatasoft Partner to Deliver Trusted AI-Ready Data for the Modern Enterprise](#)

Hearing from YOU

- Part of a panel on a topic you are familiar with
- Talk about your unique use case in a structured Q&A with a Precisely team member
- Relate a story about solving a problem (specific views, rules, implementation, adoption, working with business teams, proving value, etc.)
- Full presentation that you've given internally or externally

Precisely Ideas

<https://ideas.precisely.com/?project=DQ>

The screenshot shows the 'Precisely Ideas' community portal. At the top, there is a purple 'precisely' logo and a welcome message: 'Welcome to the Precisely Ideas Community. This portal is intended to provide you with an open and collaborative channel to submit your innovative ideas around the Precisely existing and future offerings. You can easily submit new ideas or comment on existing ideas in a way that is visible and transparent to all participants. You also have the unique opportunity to contribute to an idea's overall popularity by promoting the idea. The Precisely Product Management team will review ideas based on many factors and evaluate their potential for inclusion in our short and long term development plans. Participants who have submitted or commented on an idea may be contacted by our team. Your contact information will not be used for any other purpose. We value your contribution to making Precisely offerings even better and look forward to seeing your ideas.'

Below the welcome message, there is a navigation bar with 'Add a new idea' (highlighted in blue), 'Recent', 'Trending', and 'Popular' tabs, and a search bar labeled 'Search ideas'. On the left side, there is a sidebar with user statistics: 'My ideas' (0), 'My votes' (0), and 'My subscriptions' (0). Below this is a 'FILTER BY STATUS' section with a table:

Filter	Count
New	72
More Information Requested	5
Not Implementing at this time	23

The main content area displays a list of ideas. The first idea is titled 'Workflow Requester Can Select Access to Data Where He/She is Not a Member' and has a '1' vote. The description reads: 'Ideal user story: "Owner or Member of Digital Product A requests access to a Data Asset that is located in Digital Product B. So what needs to be approved is if Digital Products want to exchange data. The approval is granted or denied by the 3rd p...'. It was created on '15 Sep 09:33am' by 'Jennifer Santos' from 'Data Governance'. There is a 'New' badge and a comment icon with '0' next to it. Below this, the start of another idea is visible: 'Restrict users who can activate a workflow based on the relationship of the'.

Customer Success Team



Brenda
Stoetzer



Christina
Costello



Lauren
Bell



Jennie
Richardson



Liz
Dorner



Liz
Wright



Younes
Benhaddou



Whitney
Brennan



Mitch
Williams



Cyalene
Dixon



Shabana
Fazal



Susan
Foor



Patricia
Flores



Sarah
Smith



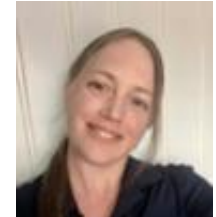
Afsane
Anand



Sherri
Chambers



Prescilla
Baldoz



Alex
McKenzie



Cali
David



Ghali
Mazzouri



Carissa
Saunders



Elle
Fuller



Thank You

precisely