BusinessFirst Data Lineage – A New Approach

A conversation with

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Xoriant CDi

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Xoriant CDi
Moderated by Mike Meriton
Co-Founder & COO, EDM Council

- Joined EDM Council full-time 2015 to lead Industry Engagement
- EDM Council Co-Founder & First Chairman (2005-2007)
- Former CEO GoldenSource (2002-2015)
- Former Executive for D&B Software and Oracle
- FinTech Innovation Lab – Executive Mentor (2011 – Present)
The focus of our discussion today will be *BusinessFirst* Data Lineage – an approach to provide functional data lineage to operations and business users.
Speaker Profiles

Masood Khatri
VP, Head of Digital Practice, Product Owner

- 25+ years of experience in building transformational products.
- Extensive experience in strategically designing, building products, roadmaps & bringing ideas/concepts to life to drive implementation.
- Has also developed and deployed cutting-edge cross-functional digital capabilities for numerous Fortune 100 enterprises, exceeding business and customer expectations.

Apnav Agrawal
Director, Data Management and Governance

- 17 Years of experience in Data Management & Governance.
- DCAM certified.
- Leading a team of Data Management SMEs.
- Developing and implementing SaaS products that meet client specifications.
- Guiding teams related to the MDM, Data Quality, Data Modeling, and Architecture.
Current process for Functional Data Lineage

Data Sources (Internal and External)

Mapping/Matching

Business Rules
Standardization, Transformation, Data Quality

Data Enrichment & Workflows

Clean and Up-to-date data to fulfill business objectives

Technology Teams
Data Lineage Tools
Develop Custom Business Dashboards

Business Users
Troubleshoot with Tech Teams
Access Custom Dashboards

Jointly create Functional Lineage and perform root cause analysis
Key Challenges with Data Lineage for Business Users

- Lack of Transparency
- Manual Effort
- Tools too Technical
- Delays in Accessing Information
What Business Needs

All changes tracked during data journey

- External/Internal data sources
- Mapping & matching rules
- Transformation, data quality and enrichment rules
- Workflows
- Provide a data flow view at feed/attribute level

Full traceability of changes during data journey

- Display transactional data at each stage for functional lineage traceability
- Audit for change in data value
- Business-friendly data views

Data Journey

Audit Trail
A *BusinessFirst* Approach towards Data Lineage

### Operational Data Management

- **Data Sources (Internal and External)**
- **Mapping/Matching**
- **Business Rules**
  - Standardization, Transformation, Data Quality
- **Data Enrichment & Workflows**
  - Clean and Up-to-date data to fulfill business objectives

### Technology Teams

- **Data Lineage Tools**
- **Develop Custom Business Dashboards**
- **Jointly create Functional Lineage and perform root cause analysis**
- **Business Users**
  - Troubleshoot with Tech Teams
  - Access Custom Dashboards

### BusinessFirst Lineage Framework
POLL 2
Capture meta data and audit trail throughout the data journey

BusinessFirst - Interface for traceability
**BusinessFirst – Feed level data lineage**

**BusinessFirst Data Lineage**

**Feed - Mapping Based Lineage | FDIC - Banks**

- **FDIC - Banks**
  - STNAME
  - CERT
  - ACTIVE
  - CITY
  - NAME
  - ZIP
  - ADDRESS

- **Standardization**
  - Standardize States to ISO Subdivision Codes

- **Transformation**
  - If value = 1 Then "Active" Else if value = 0 Then "inactive"

- **Data Quality**
  - Validate States against ISO Subdivision
  - Value should be unique
  - Validate City against 'Ref City Master'
  - Length <=255
  - Length in (5,10) Format in (dddd, dddd-dddd)

- **Master Data**
  - Business Address Sub-division
  - FDIC CERT Number
  - Entity Status
  - Business Address City
  - Legal Name
  - Business Address Post Code
  - Building Name
  - Street Name
  - Building Number
  - Floor

- **Reference Tables**
  - ISO Subdivision
  - Ref City Master

Select Feed > FDIC > FDIC - Banks
BusinessFirst – Attribute level data lineage
### BusinessFirst Data Lineage

**Legal Name**: Ebusinessware, Inc. -> Xoriant Corp

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<tr>
<th>Old Value</th>
<th>New Value</th>
<th>Created by</th>
<th>Created date</th>
<th>Updated by</th>
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<td>CRM System</td>
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<td>MK43156</td>
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**Workflow**

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**Matching**

**Matching Specification 02**

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<thead>
<tr>
<th>Source Attribute</th>
<th>Gold Attribute</th>
<th>Matching Type</th>
<th>Matching Result</th>
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<td>Legal Name</td>
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<td>100%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>100%</td>
</tr>
</tbody>
</table>
Benefits

- Business Friendly
- Reduced Dependency on Technology Team
- Increased Transparency
- Increased Productivity/Speed
Questions?
FOR MORE INFORMATION:

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