

Data Governance User Group

May 16, 2024



Agenda

1

**Striving for the Next
Level Together**
- Schaeffler
& Precisely

2

**Data Governance
Roadmap Update**

3

**Announcements &
Wrap Up**

Thomas Batari



Specialist Data & Analytics Governance-Schaeffler

Thomas Batari leads the Strategic Digitalization – Data & Analytics Governance team for the Data Catalog at Schaeffler. He has 18 years of experience at Schaeffler working on a variety of projects from SAP Master Data at Schaeffler Korea, Supply Chain Manager to Corporate Data Management. He and his team are experts for Data Management and are the Business Product Owners for the Data Catalog.

Ken Beutler



Sr. Director, Product Mgmt, Data360 Govern

Ken Beutler is the Senior Director of Product Management responsible for the Data Governance product line. He has 20 years of experience in data integration, quality, governance, and connectivity markets. Prior to his role at Precisely, he helped lead and bring to market new product initiatives for SAP and SAS for their data management product portfolios.



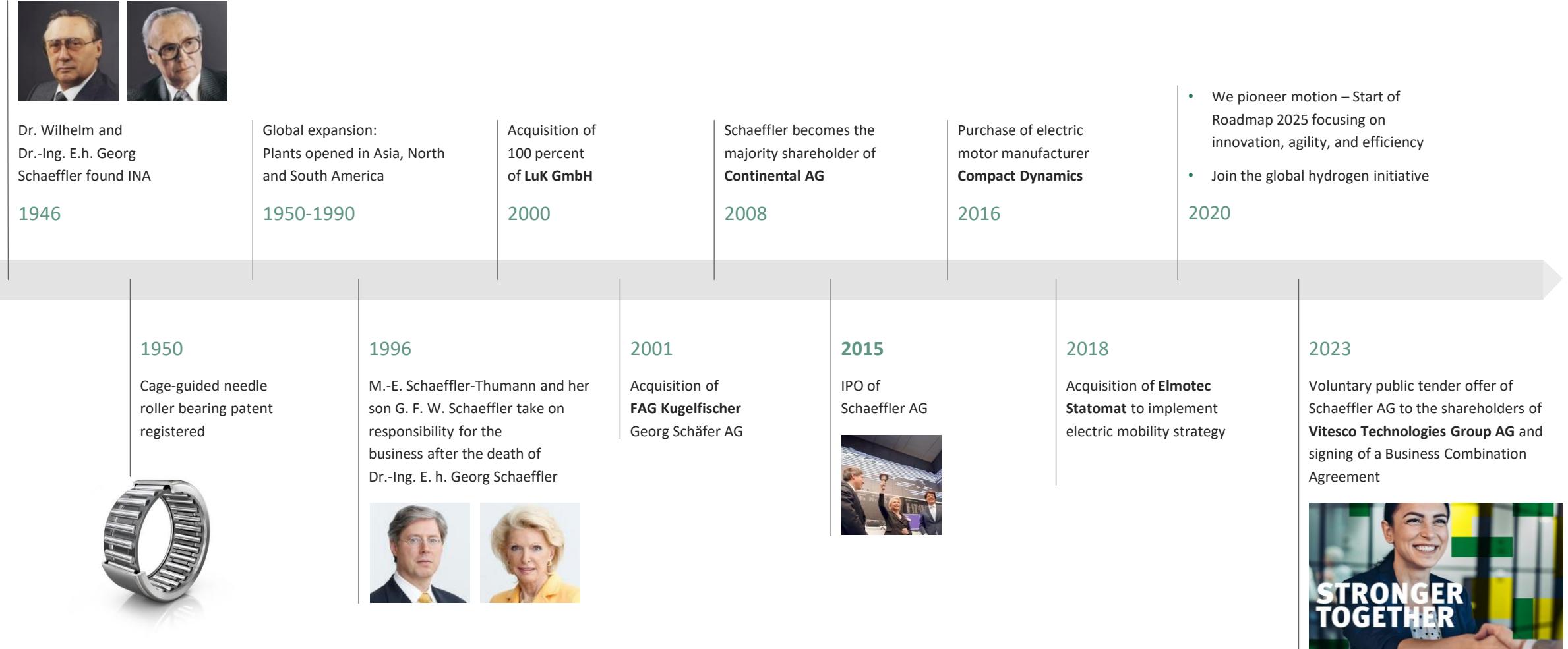
Striving for the next level together - Schaeffler & Precisely

We pioneer motion

Agenda

- 1 Schaeffler at a glance**
- 2 Our Data Story**
- 3 Our Data Catalog Story**
- 4 Outlook and Challenges**

Our origin – Significant milestones in our company history



Schaeffler facts and figures – One of the world's largest family-owned companies

~83,400
employees worldwide

~200 locations in
~54 countries

82 plants and
20 R&D centers

~€16.3 billion
of sales in 2023

7.3%
EBIT Marge in 2023¹

>1,000
patents registered in 2023

¹ Before special items

Schaeffler products facilitate and shape mobility – Our customer sectors

TWO-WHEELERS



CARS & LIGHT
COMMERCIAL VEHICLES



TRUCK & BUS



OFF-ROAD



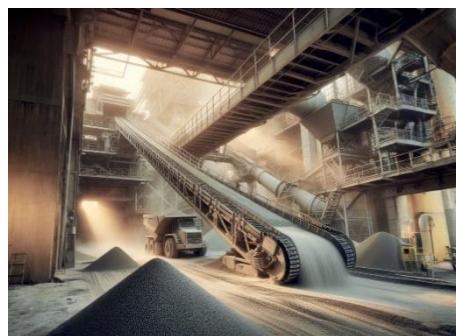
RAIL



AEROSPACE



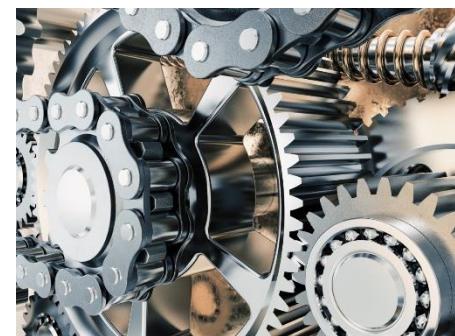
RAW MATERIALS



INDUSTRIAL AUTOMATION



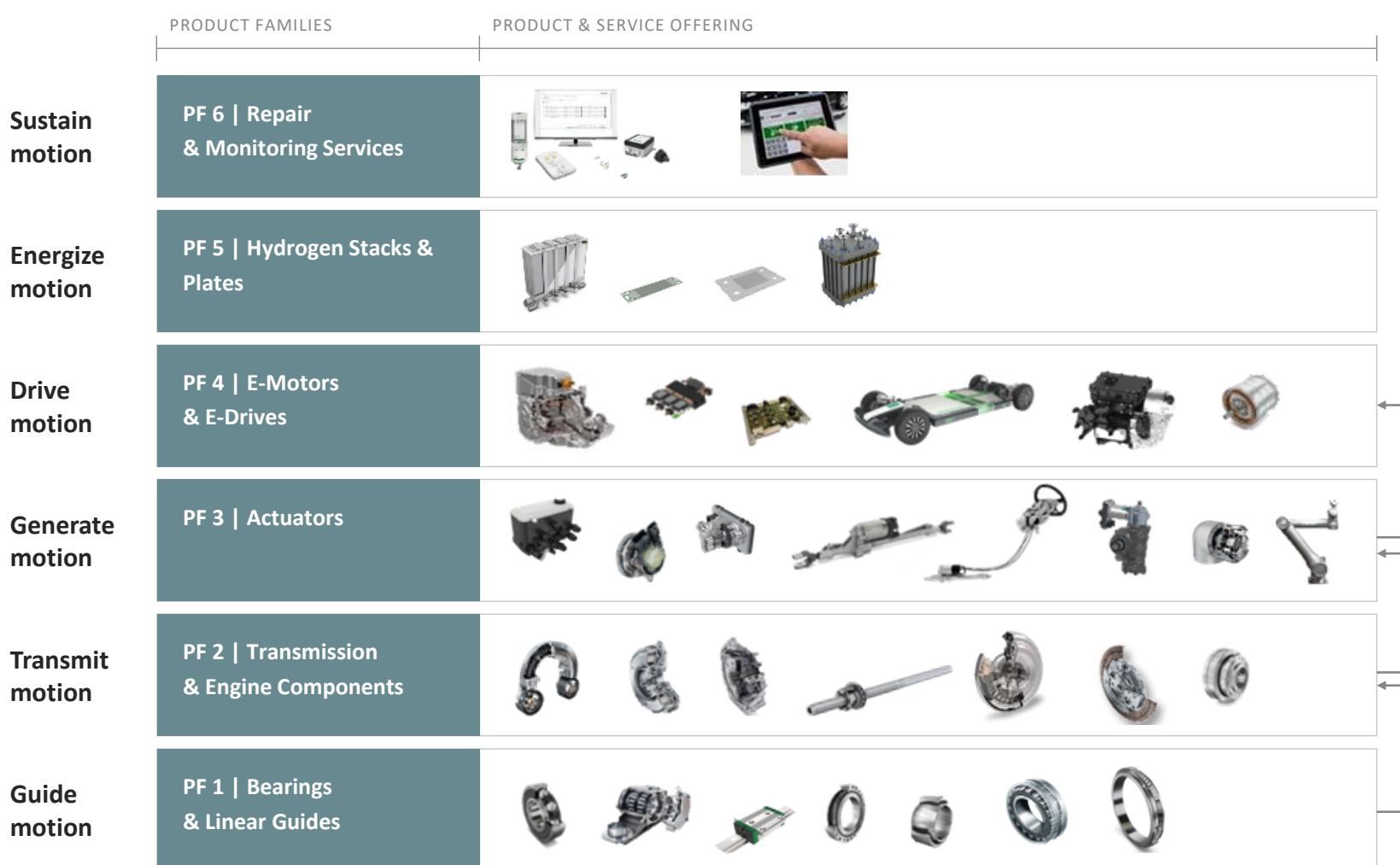
POWER TRANSMISSION



WIND



Our Product & Service Offering – Motion as the connecting element



Key Aspects

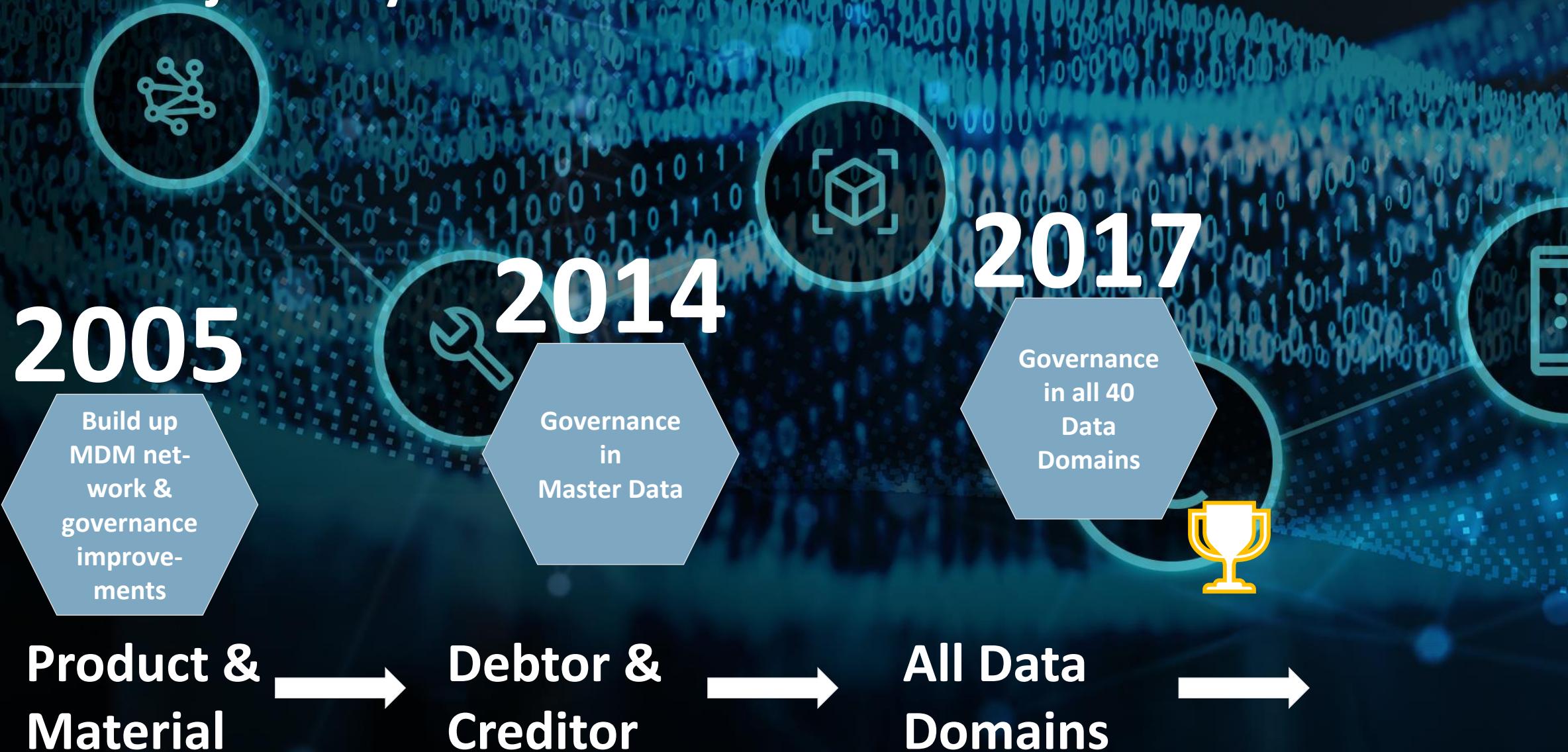
- Schaeffler product & service portfolio categorized into 6 Product families
- All product families associated with their respective notion of motion, from guide motion to sustain motion
- Product families address customer requirements along all 4 market and 10 sector clusters
- Use all the Schaeffler know-how in our core technologies to create maximum customer value and a unique selling proposition

Motion as the connecting element

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Our Data journey



Our Data journey

2020

Governance
including a
Data Catalog



Data Catalog
Metadata

2023

Governance
in Data
Usage /
Analytics



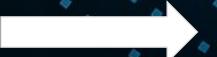
Data
Products

today

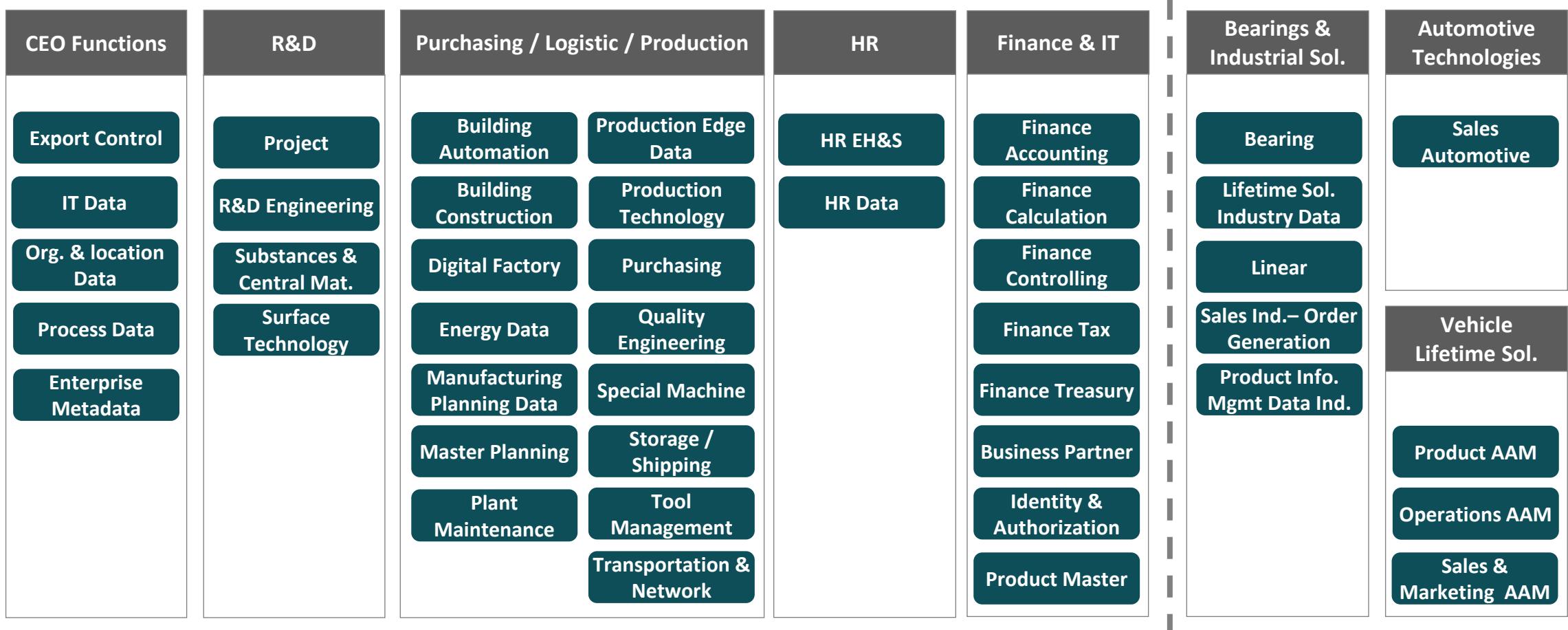
Further
extend of
Governance



AI catalog



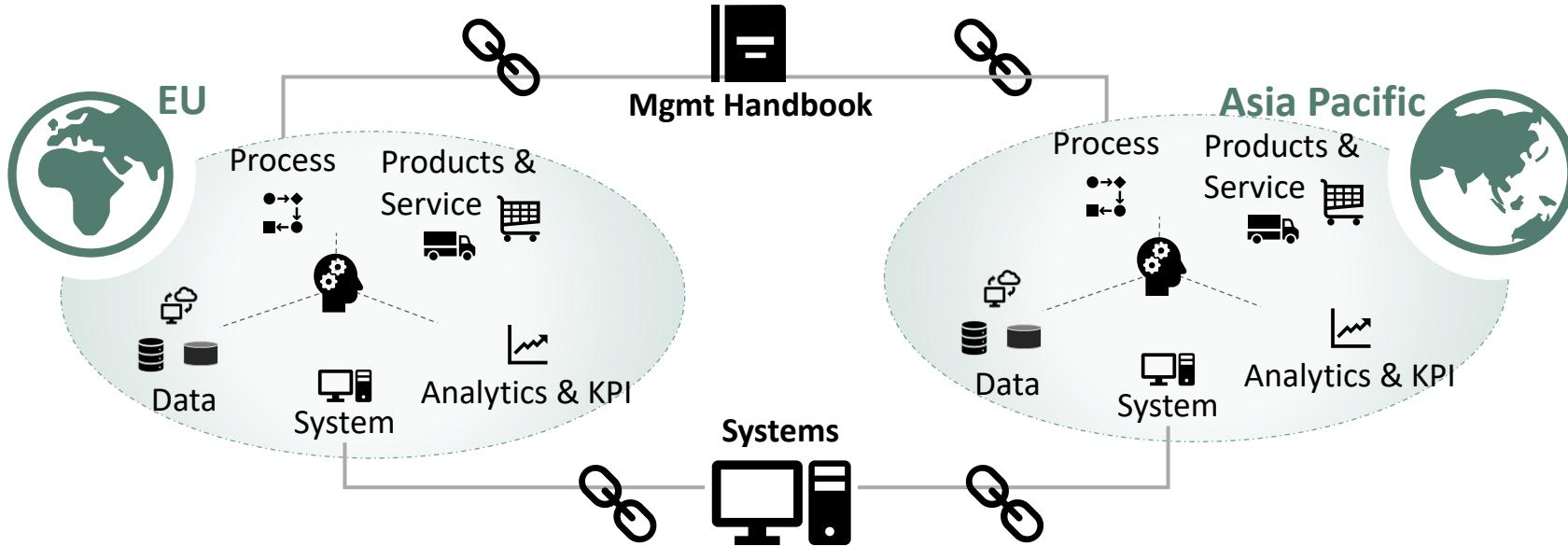
One result of our data journey - Our Data Domain overview



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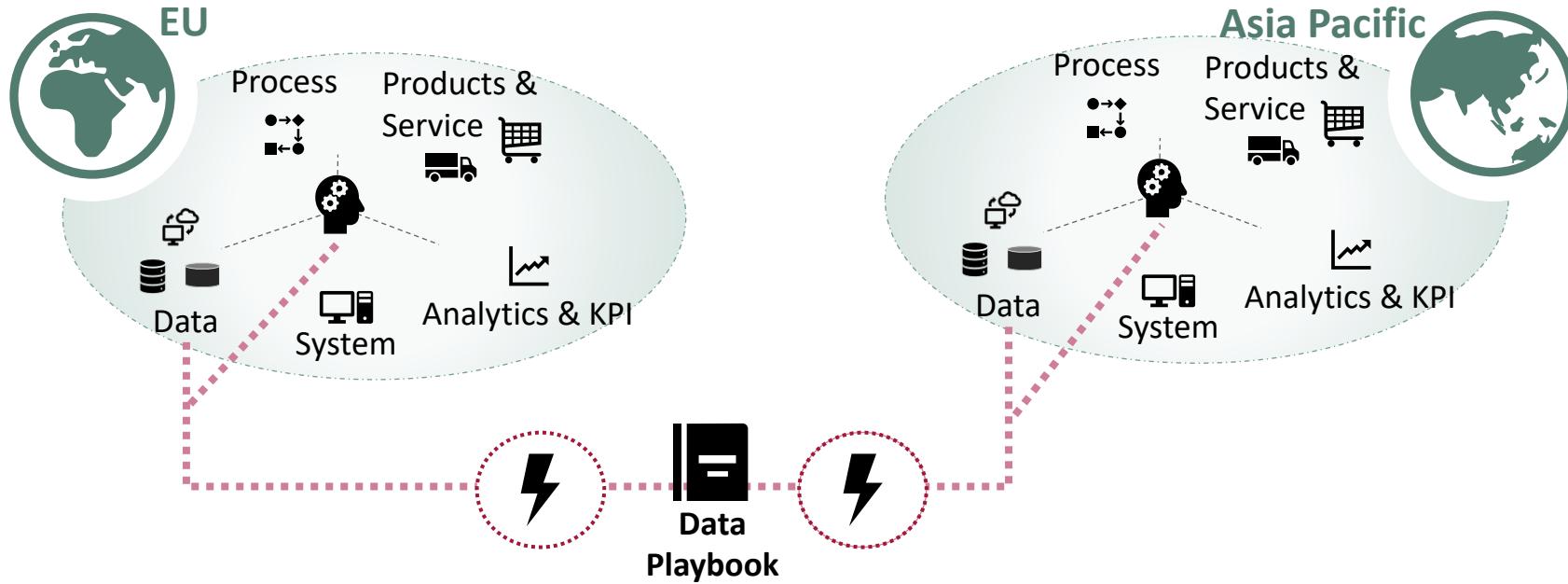
Why we needed a Data Catalog - We are working in a highly federated and agile environment with dedicated clips



Dedicated clips are
already existing

- Process: Management Handbook
- Monolith Systems: SAP ERP, PTC Windchill, ...

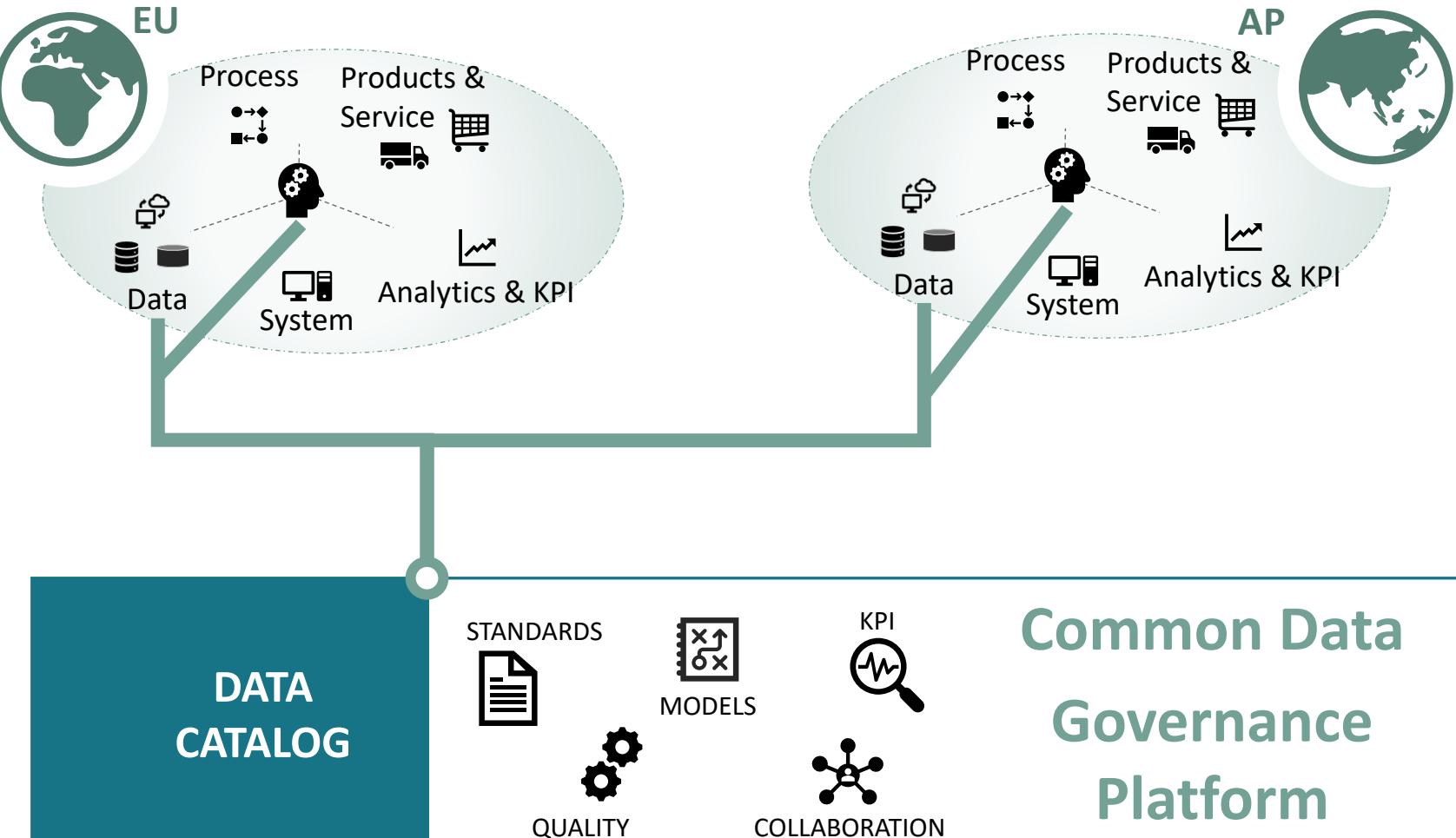
Why we needed a Data Catalog - We had no data playbook



Data is handled and understood differently

- Data Playbook = Architecture
- Understanding & usage

Why we needed a Data Catalog - The Data Catalog generates advantages



Common Data Governance Platform

Transparency generates efficiency

Increased Data Quality

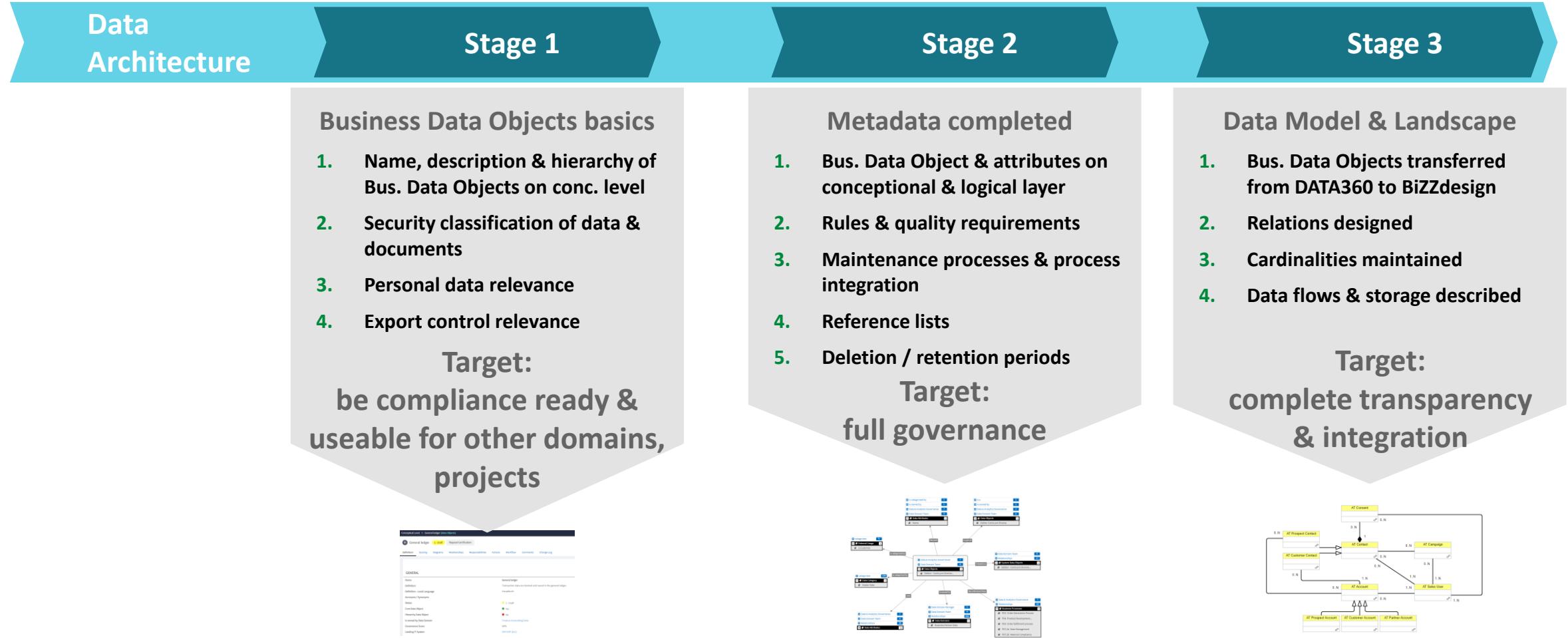
Accelerated Project Delivery

Optimized Accuracy in Analytics & Data Usage

Regulatory Compliance

Data Governance, efficient & standardized

How we implement - Our three stages of Data Architecture



Live demo : Data Domain

[Data Catalog - Data360 - Home \(data3sixty.com\)](http://data3sixty.com)

Lessons learned for our Data journey

Get Executive Board support

Go step by step to boost the benefits of your work (concept >> implementation)

Create the concept >> find and establish responsibles >> implement their scope together

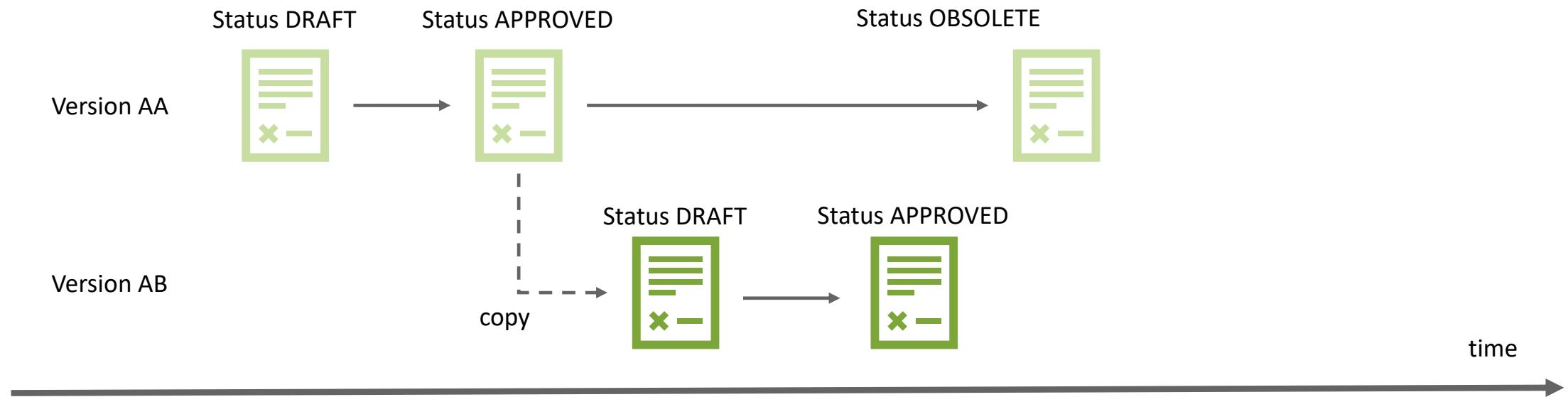
Involve the whole team to implement your concept (not just a few)

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Challenges – Where we require Precisely's support

- Versioning



- Business Case: An approved version of a Business Data Object needs to be updated. Currently the status will be set to draft again for the update and then needs to be re-approved after finishing. During that time, no “approved” version is available in the Data Catalog >> **Audit finding**

Challenges – Where we require Precisely's support

- **AI in Data Catalog**



- Business Case: Enable the usage of the Data Catalog for a state-of-the-art technology within the Data Catalog.
(side note: we already added some content of the Data Catalog to the Schaeffler chatbot)
- Which AI functions Precisely has planned here by when? We are particularly interested in a generative AI chat function for ChatGPT

Thank you

For striving for the next level
together



We pioneer motion

Thank you

precisely

Data Governance Roadmap Update

May 2024 Govern User's Group

Ken Beutler, Senior Director of Product
Management

May 2024

Disclaimer

The following roadmaps outline Precisely's general product direction.

This is intended for informational purposes only and may not be used to form the basis for any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The specific features, functionality and release timing of any new products or new versions of current products remain at the sole discretion of Precisely.

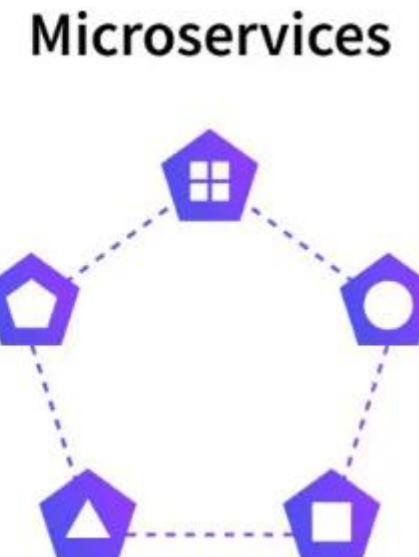
This presentation contains Precisely confidential statements. Final implementation and delivery dates are subject to change without prior notice.

What have we been up to?

Recap

Modernizing Data360 Govern to:

- Account for the vast growing volumes of all metadata (tech/business/operational/social)
- Provide a seamless integration and user experience across the Data Integrity Suite
- Ensure performance and scalability now and for the future
- Simplify deployments for a faster time to market
- Increase overall quality through a foundation of automated testing from UI to backend



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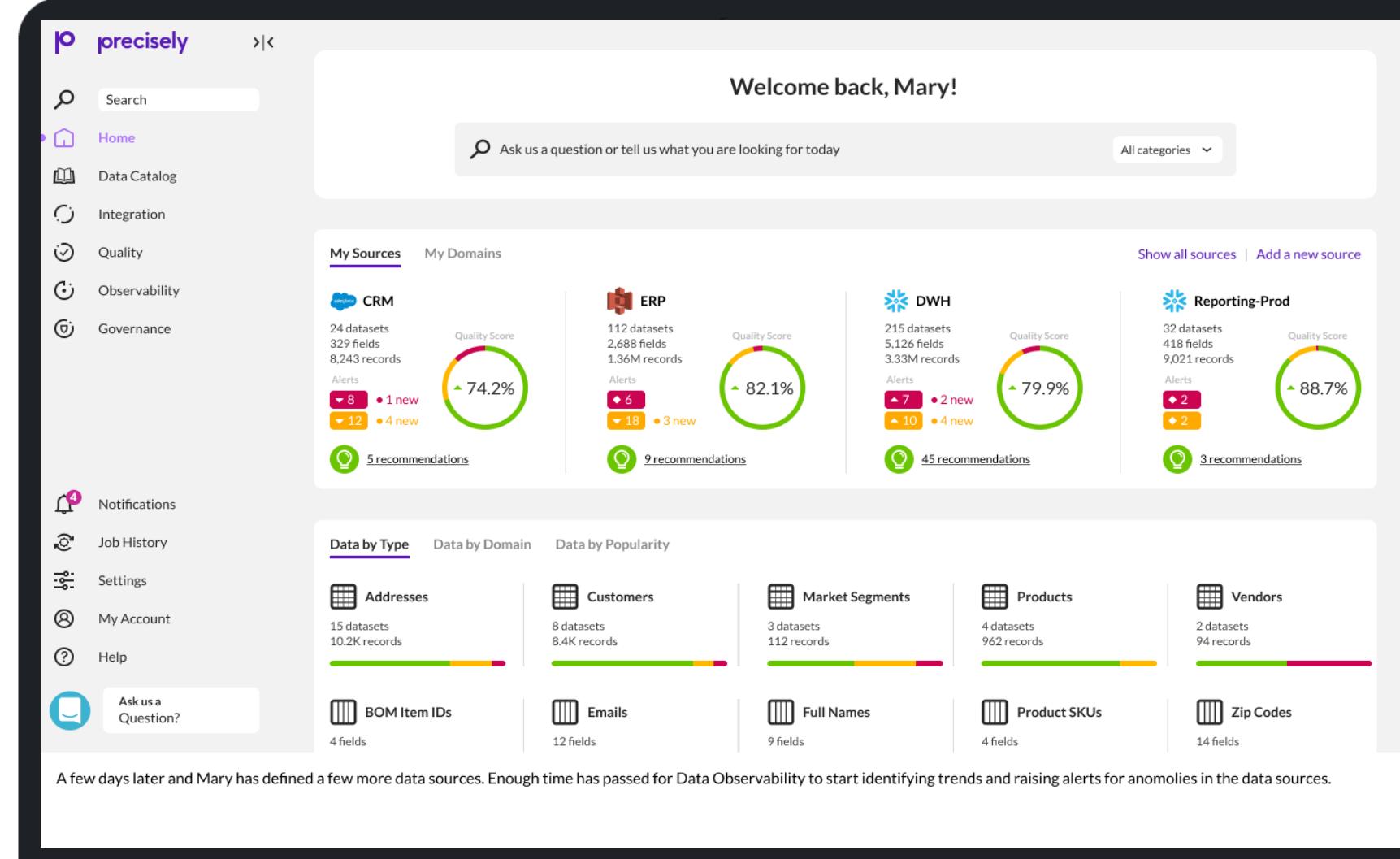
Data Governance Roadmap

Themes	Now	Next	Later
Trusted Demonstrably accurate and understood by all users	Extensible Rules Framework: Custom, reusable rules that produce data trust metrics for any catalog or governed asset	Data Integrity Scoring: Provides holistic understanding of catalog asset integrity based on quality, usage, and governance.	Collaboration: Democratize tribal knowledge and improve collaboration directly within Slack and Teams
Actionable Fast access to insights	Enhanced Lineage Visualization: Enhance the transparency, accuracy, and usability of data across complex IT environments	Usage Analytics: Proactively measure and track usage of governed assets, policies and KPIs to gain insight into adoption and operationalization	Dynamic Data Access Controls, Masking, and Redaction: Implements strict access and visibility controls automatically according to data sensitivity
Persona-based Usable by technical and business users	Modernized Workflow: Model and operationalize governance processes to mimic organizational standards	Enhanced Search and Curation: Streamlining asset discovery using natural language search and enhanced metadata curation	Marketplace: Encourages data sharing and consumption within a user-friendly marketplace.
Future-proof Scalable and adaptable to future volumes, data sources, data types, and more	High-scale Performance: Enables seamless catalog scaling, ensuring consistent performance regardless of data volume increases.	Universal Connectivity: Connect the Suite anywhere to nearly any data source, ETL or BI tool	

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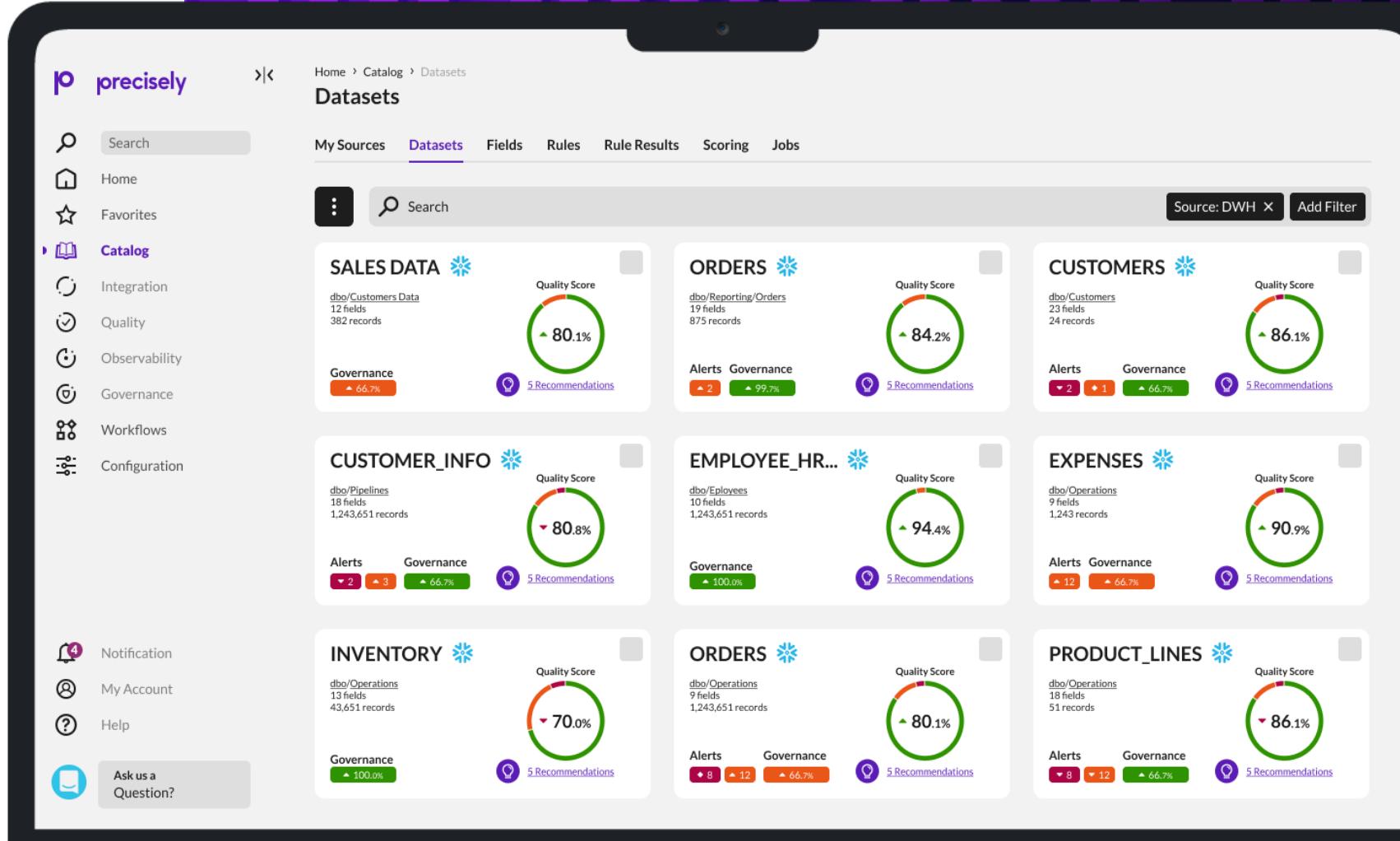
Persona-based and personalized homepage that can be configured to drive insights and recommendations.



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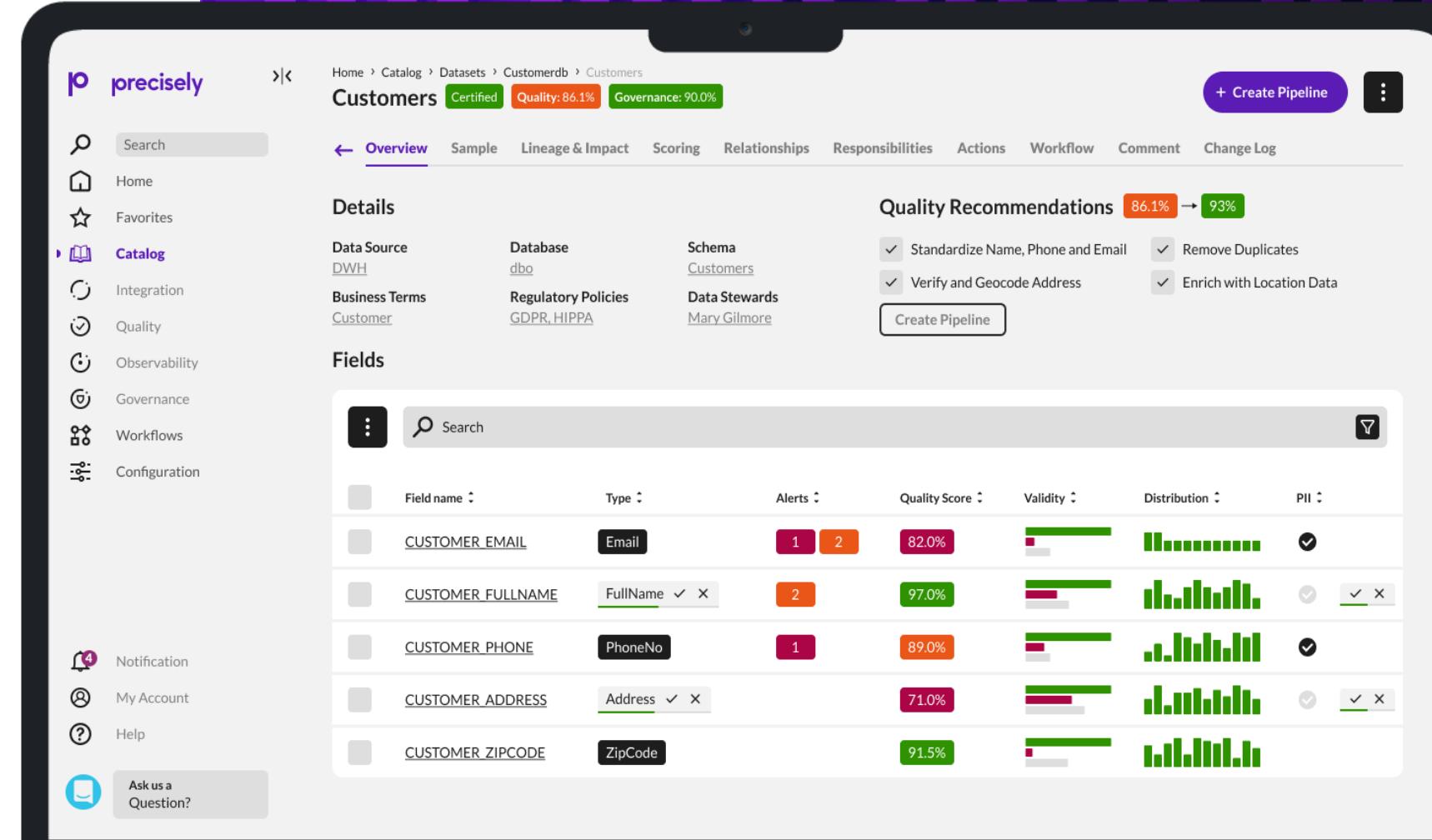
Streamlined, context-sensitive catalog view of datasets, inclusive of data quality, governance, and observability alerts and quick link to targeted recommendations.



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Improved, logical representation of technical and business metadata, profile details, and quick links to recommendations at the data asset level.

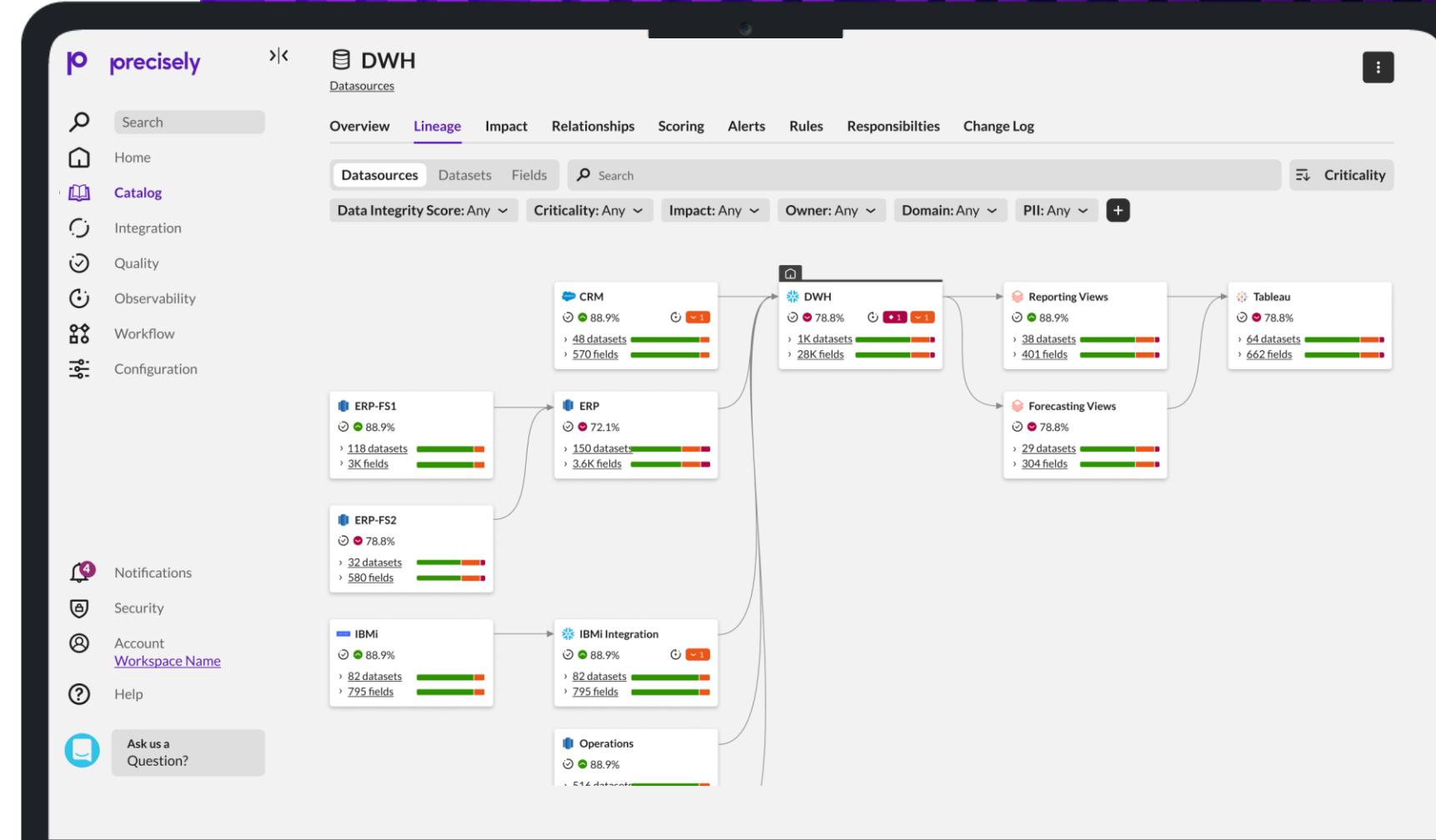


The screenshot displays the Precisely Data Integrity Suite interface. The top navigation bar shows the path: Home > Catalog > Datasets > Customerdb > Customers. The main header indicates the dataset is Certified, has a Quality of 86.1%, and a Governance score of 90.0%. A prominent 'Create Pipeline' button is located in the top right. The left sidebar includes a search bar and links to Home, Favorites, Catalog (selected), Integration, Quality, Observability, Governance, Workflows, Configuration, Notification, My Account, and Help. A 'Ask us a Question?' button is also present. The main content area is divided into 'Details' and 'Fields' sections. The 'Details' section shows the Data Source (DWH), Database (dbo), Schema (Customers), Business Terms (Customer), Regulatory Policies (GDPR, HIPPA), and Data Stewards (Mary Gilmore). The 'Fields' section lists five fields: CUSTOMER_EMAIL, CUSTOMER_FULLNAME, CUSTOMER_PHONE, CUSTOMER_ADDRESS, and CUSTOMER_ZIPCODE. Each field is categorized by Type (Email, FullName, PhoneNo, Address, ZipCode) and includes a 'Search' bar. The 'Quality Score' column shows values of 82.0%, 97.0%, 89.0%, 71.0%, and 91.5% respectively. The 'Validity' and 'Distribution' columns provide visual representations of data quality and distribution, with PII status checkboxes. A 'Create Pipeline' button is located in the 'Fields' section.

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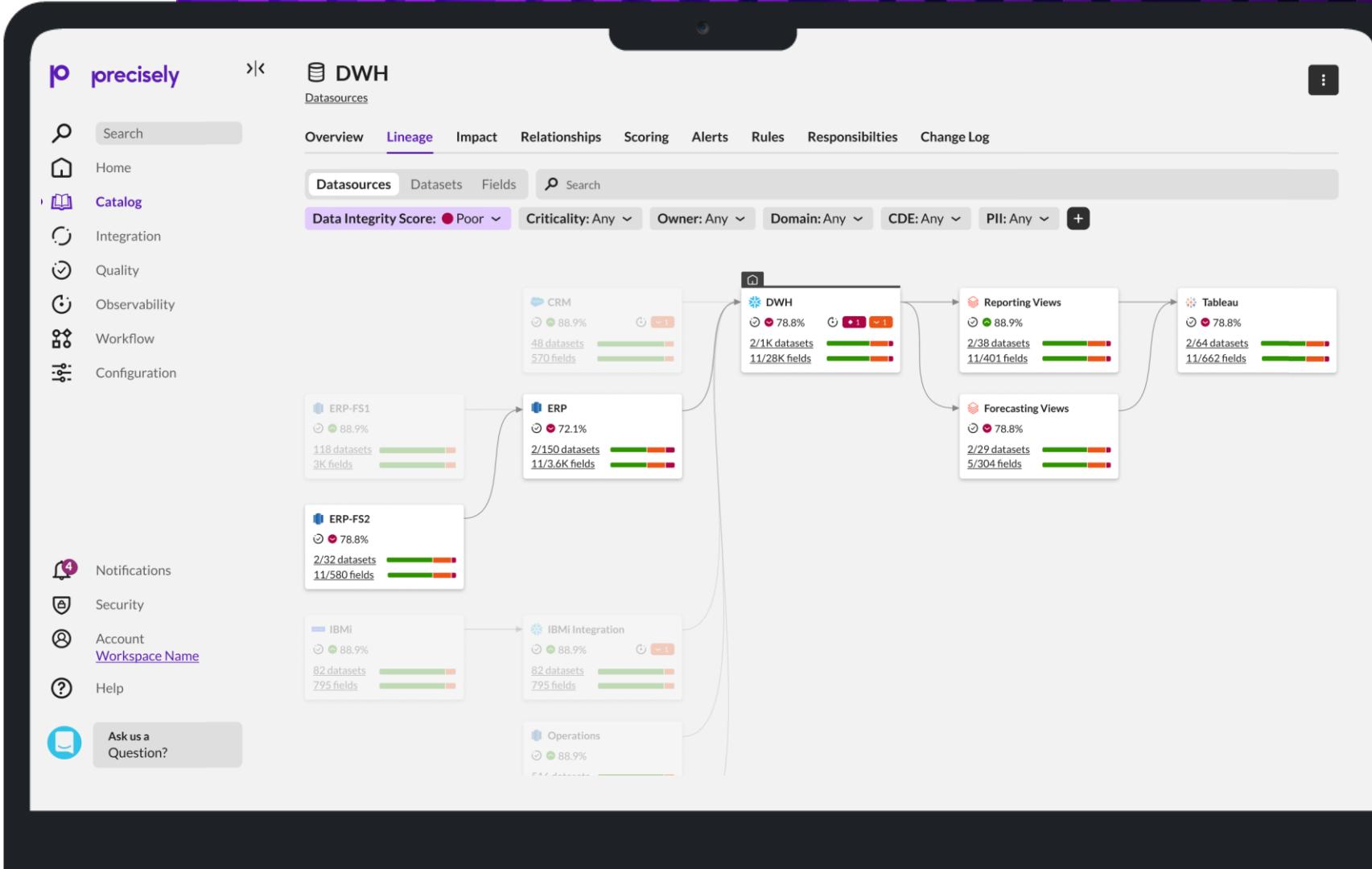
Simplified lineage diagrams to reduce complexity and easily determine the provenance of data.



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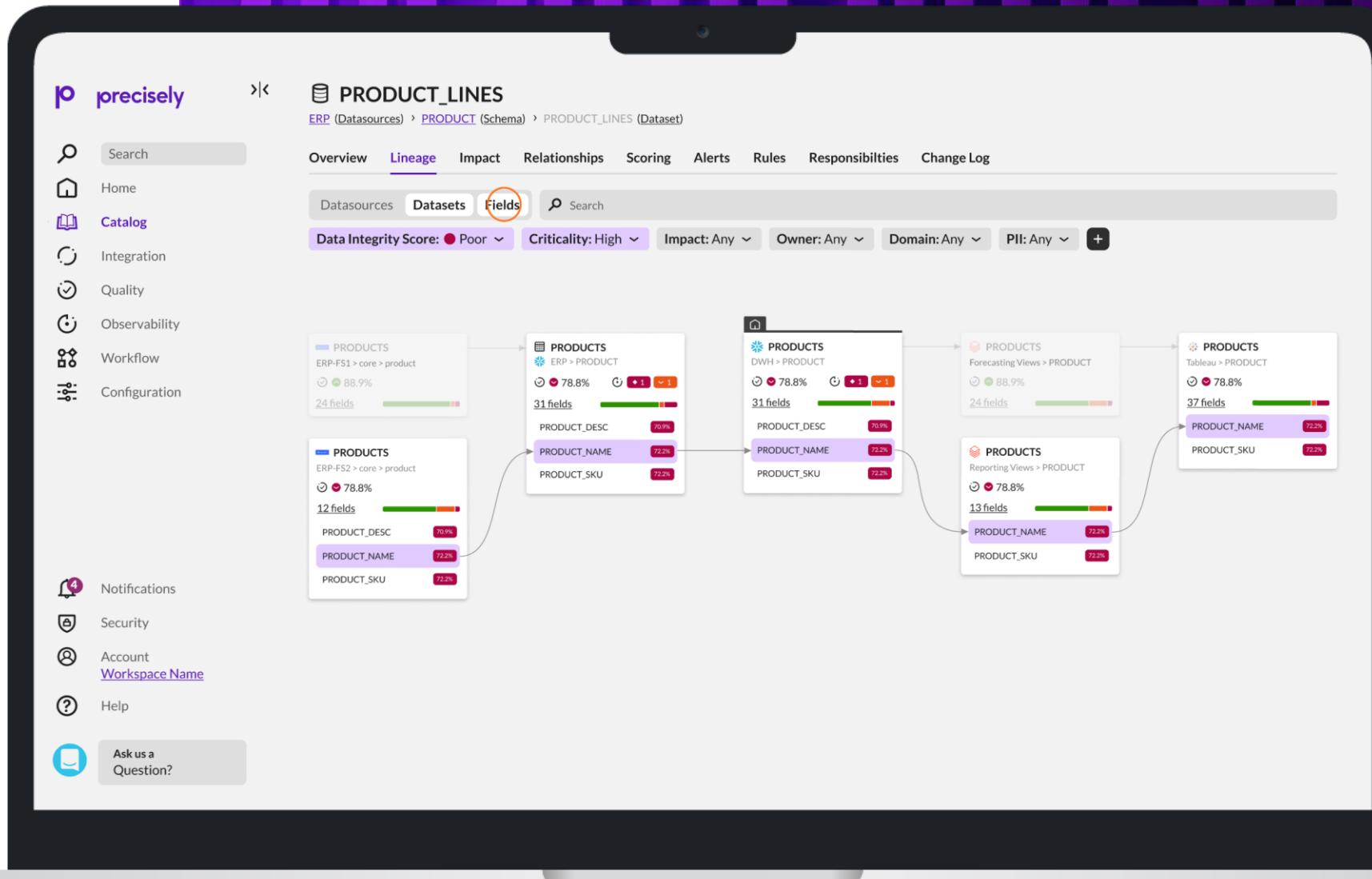
Dynamic filtering of lineage diagrams based on technical and business asset values/configuration.



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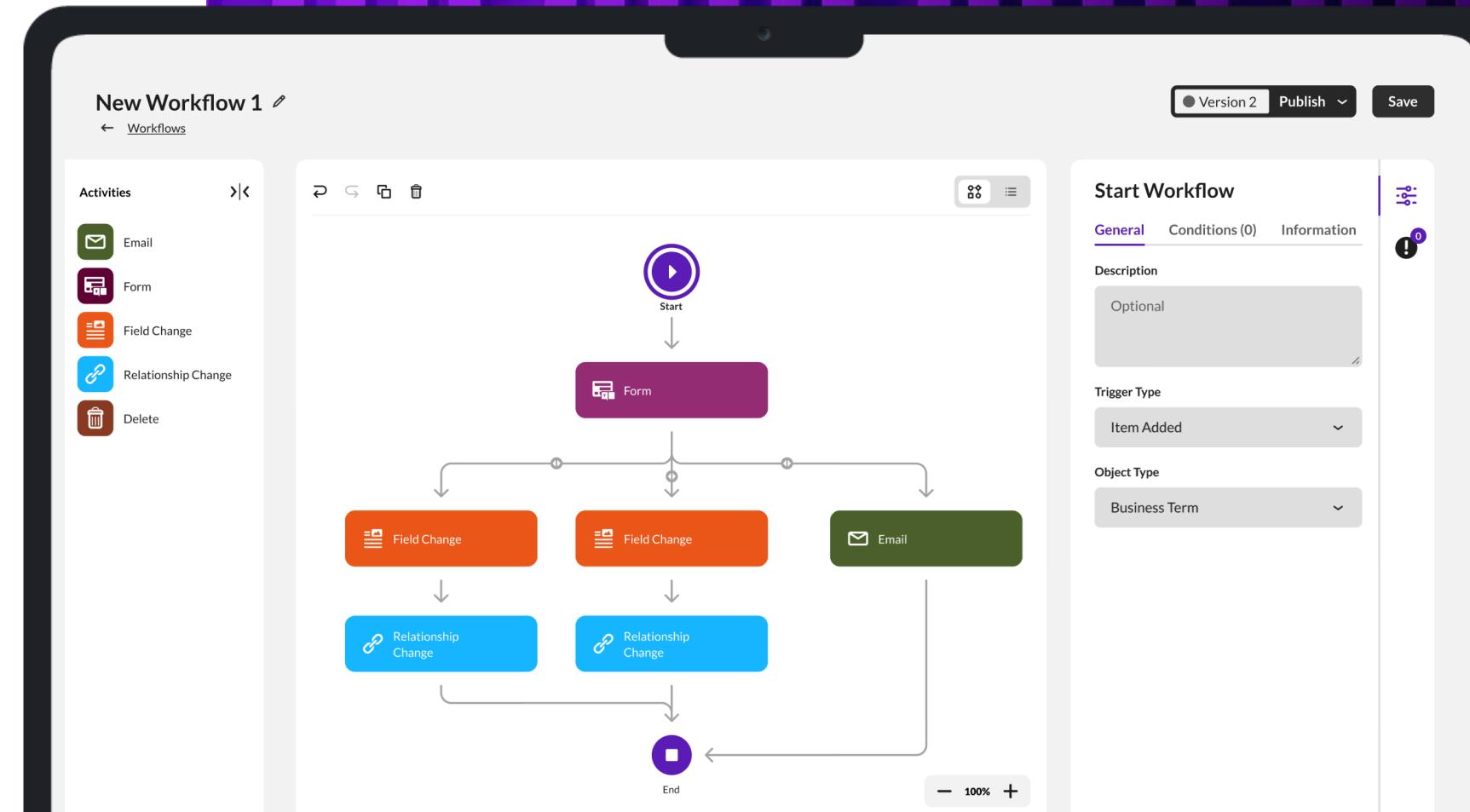
Interact with lineage diagrams to view data observability and data quality results and take follow on actions.



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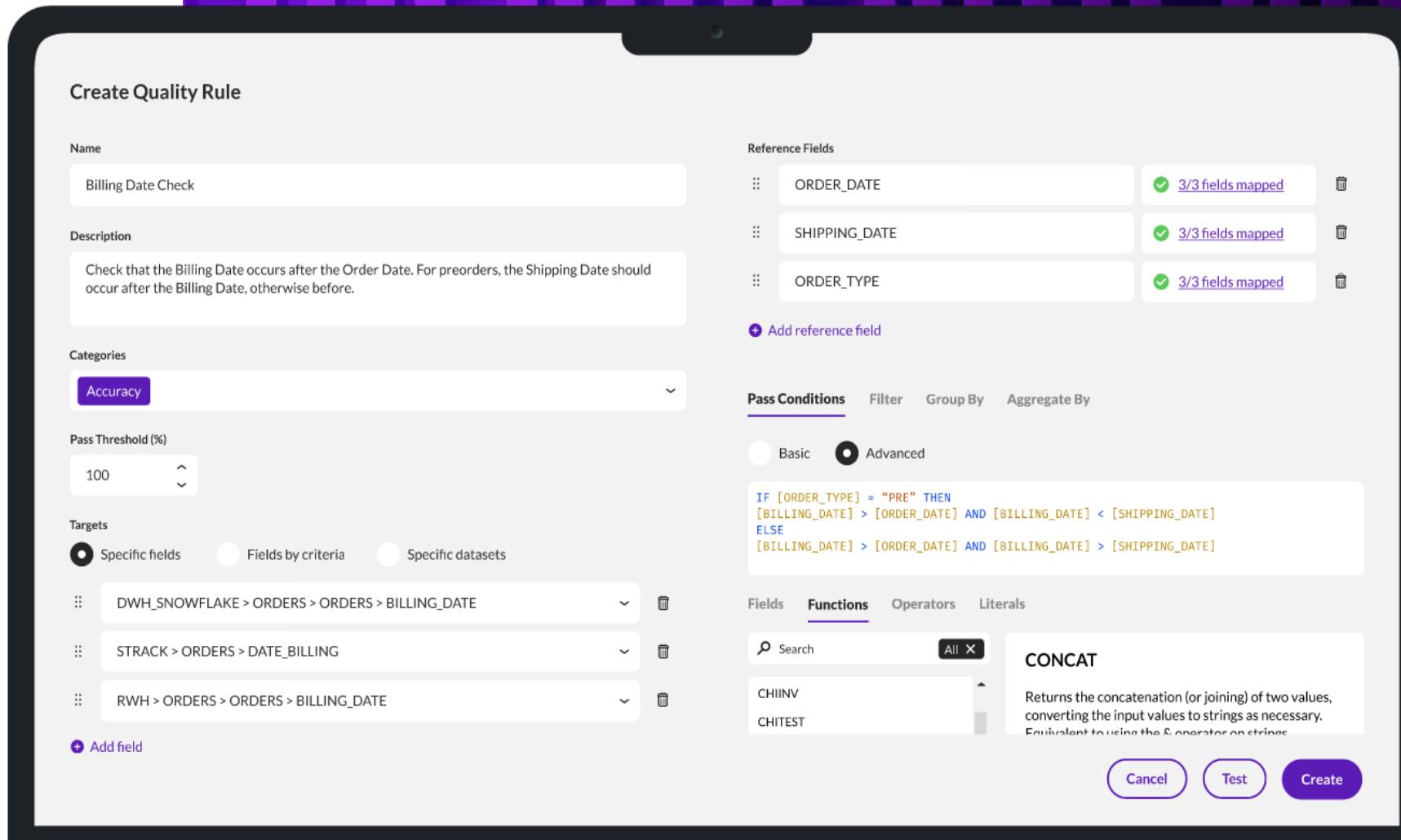
Model and automate data governance processes with a new and streamlined **workflow** user experience.



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Simplified data quality rule configuration based on business rules libraries, recommendations, and advanced options.



Create Quality Rule

Name
Billing Date Check

Reference Fields

- ORDER_DATE: 3/3 fields mapped
- SHIPPING_DATE: 3/3 fields mapped
- ORDER_TYPE: 3/3 fields mapped

Description
Check that the Billing Date occurs after the Order Date. For preorders, the Shipping Date should occur after the Billing Date, otherwise before.

Categories
Accuracy

Pass Threshold (%)
100

Targets
Specific fields

Pass Conditions

Basic (selected) Advanced

```
IF [ORDER_TYPE] = "PRE" THEN
[BILLING_DATE] > [ORDER_DATE] AND [BILLING_DATE] < [SHIPPING_DATE]
ELSE
[BILLING_DATE] > [ORDER_DATE] AND [BILLING_DATE] > [SHIPPING_DATE]
```

Fields **Functions** **Operators** **Literals**

Functions

- Search: All
- CONCAT
- CHIINV
- CHITEST

Cancel **Test** **Create**

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Field scores are automatically rolled up into dataset and data source scores

The screenshot displays the Precisely Data Integrity Suite interface. On the left, a sidebar menu includes: Search, Home, Favorites, Catalog (selected), Quality, Observability, Integration, Governance, Configuration, Security, Account (Workspace Name), Help, and Ask us a Question? A search bar is also present in the sidebar.

The main content area shows the 'CUSTOMERS' dataset with the 'Scoring' tab selected. It displays the 'Quality Score Dimensions' for the 'CUSTOMERS' dataset. The dimensions shown are:

- Completeness: 88.37% (Dimension Score: 23 Field Scores)
- Validity: 98.00% (Dimension Score: 4 Field Scores)
- Dataset Score: 90.28%

On the right, a detailed view of the 'Completeness' dimension score is shown. It lists 23 field scores with their respective scores and last evaluated times:

Fields	Score	Last evaluated
Account Number	93.67%	27 Jul 2023 10:05am
ACCOUNT_SNO	81.20%	27 Jul 2023 10:05am
CUSTOMER_ADDRESS_DETAILS_FIRSTNAME	91.00%	27 Jul 2023 10:05am
CUSTOMER_CONTACT_NUMBER	97.64%	27 Jul 2023 10:05am
CUSTOMER_FIRST_NAME	97.64%	27 Jul 2023 10:05am
CUSTOMER_LAST_NAME	73.94%	27 Jul 2023 10:05am
CUSTOMER_MIDDLE_NAME	88.80%	27 Jul 2023 10:05am
CUSTOMER_SSN	88.80%	27 Jul 2023 10:05am
CUSTOMER_ZONE_ID	97.64%	27 Jul 2022 10:05am

At the bottom, a summary of the Completeness Score is shown: 88.37% (27 Jul 2023 10:05am).

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AI: Enhanced Search and Curation

- Validation phase
- Automated metadata curation
 - Business asset recommendations and semantic tagging
 - Recommend hidden relationships between technical assets and business assets
 - Recommended technical and business asset description
- Natural language search

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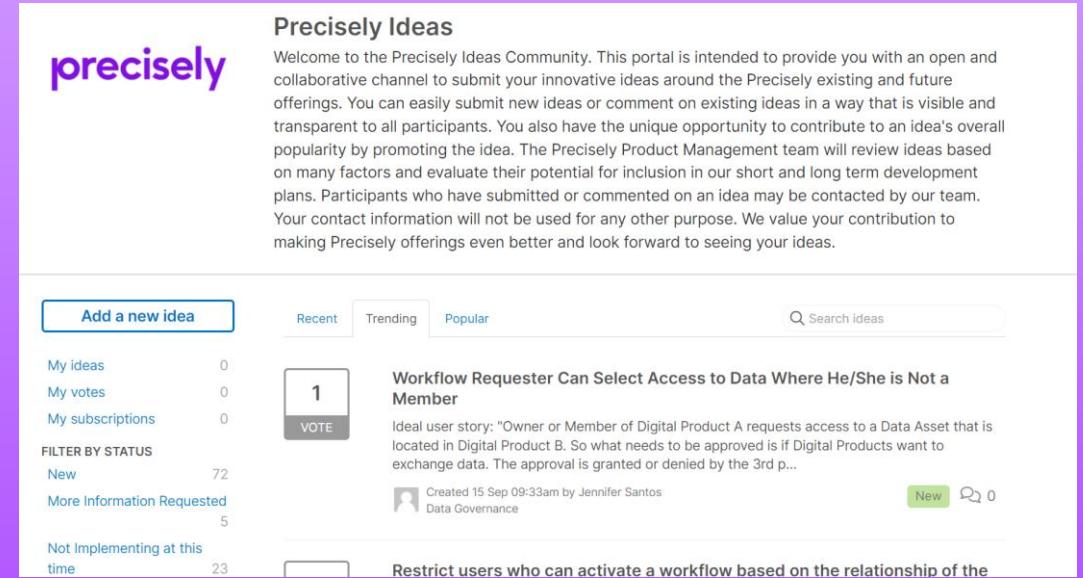
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Thank you

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

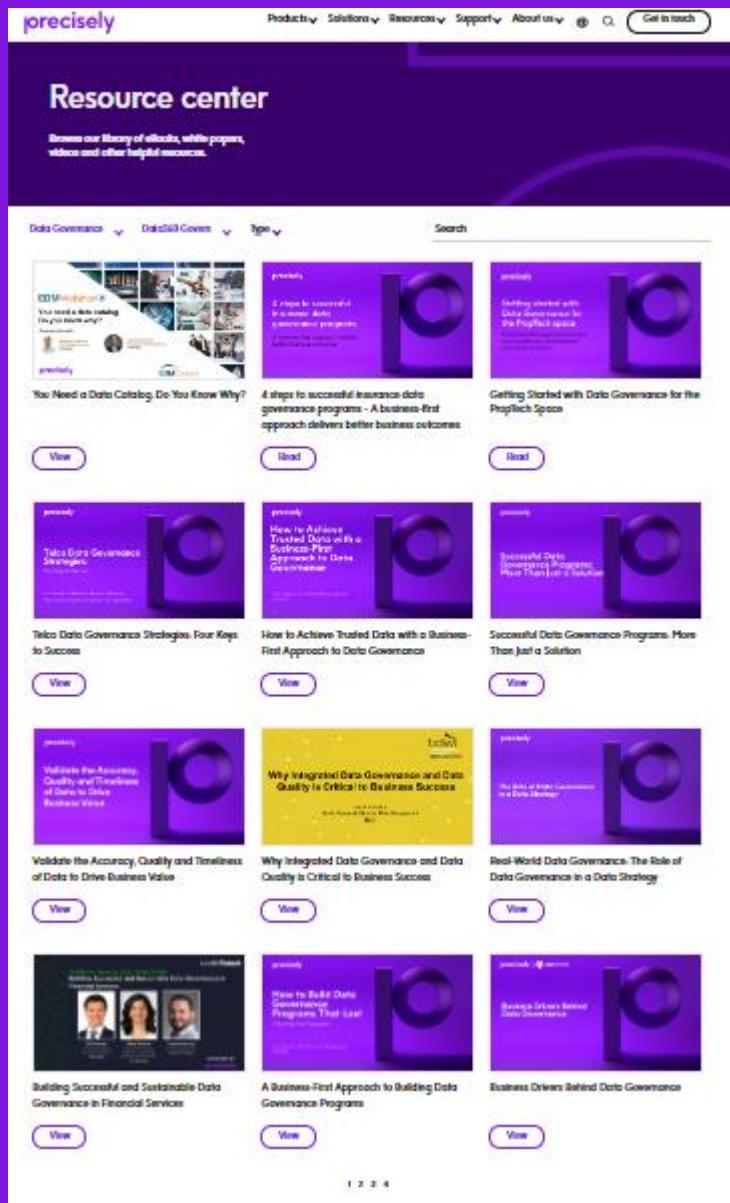


The screenshot shows the homepage of the Precisely Ideas portal. At the top, the 'precisely' logo is displayed. Below it, a welcome message from the Precisely Product Management team encourages users to submit innovative ideas. The interface includes a navigation bar with 'Recent', 'Trending', 'Popular', and a search bar. On the left, a sidebar provides user statistics: 'My ideas' (0), 'My votes' (0), and 'My subscriptions' (0). It also features a 'FILTER BY STATUS' section with 'New' (72), 'More Information Requested' (5), and 'Not Implementing at this time' (23). The main content area displays a single idea card for a user named Jennifer Santos, with a '1 VOTE' button. The card includes a description of the user story and a 'Created 15 Sep 09:33am by Jennifer Santos Data Governance' timestamp. A 'New' button and a '0' icon are also present.

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

HINT: Filter by Data Governance

Precisely.com/Resource-center



Next Data Governance User Group: July 18, 2024

Precisely in the News:

- [Precisely Recognized on CRN 2024 Big Data 100 list](#)
- [EY Announces Josh Rogers of Precisely as an Entrepreneur of the Year® 2024 New England Finalist](#)
- [Precisely Drives Confidence in AI-ready Data at the Gartner® Data & Analytics Summit](#)

Precisely & Precisely Sponsored Webinars

- May 7 AI Dataversity Mastery Panel (on demand)
- Jun 19: Master Data is Not Enough [Registration Link](#)
- May 20: TDWI - State of Data Quality Panel Webinar [Registration Link](#)
- Jun 7: EDM Council - 3 Economies of Scale in Mastering Your Data

Upcoming Events

DGIQ West: San Diego, June 3-7
"Driving Data Governance Value in Record Time:
The Northwest Bank Case Study"

- Jared Matchette, Sr Data Governance Analyst

Data Governance Customer Success Team



Brenda
Stoetzer



Cheryl
Vogler



Christina
Costello



DeeDee
Jimenez



Jennie
Richardson



Liz
Dorner



Liz
Wright



Younes
Benhaddou



Ben
Hayhurst



Mitch
Williams



Stephen
Morganson



Shabana
Fazal



Susan
Foor



Patricia
Flores



Sarah
Smith



Afsane
Anand



Sherri
Chambers



Prescilla
Baldoz



Alex
McKenzie



precisely

Customer Success



Alex
Ebright



Cali
David



Ghali
Mazzouri



Kevin
Kliska



The background features a dark purple gradient with several 3D-rendered shapes. There are two large, semi-transparent spheres, one in the upper right and one in the lower left, both with a dark purple-to-white gradient. Behind the text, there are two large, semi-transparent rectangular blocks, one on the left and one on the right, also with a dark purple-to-white gradient.

Thank You

precisely