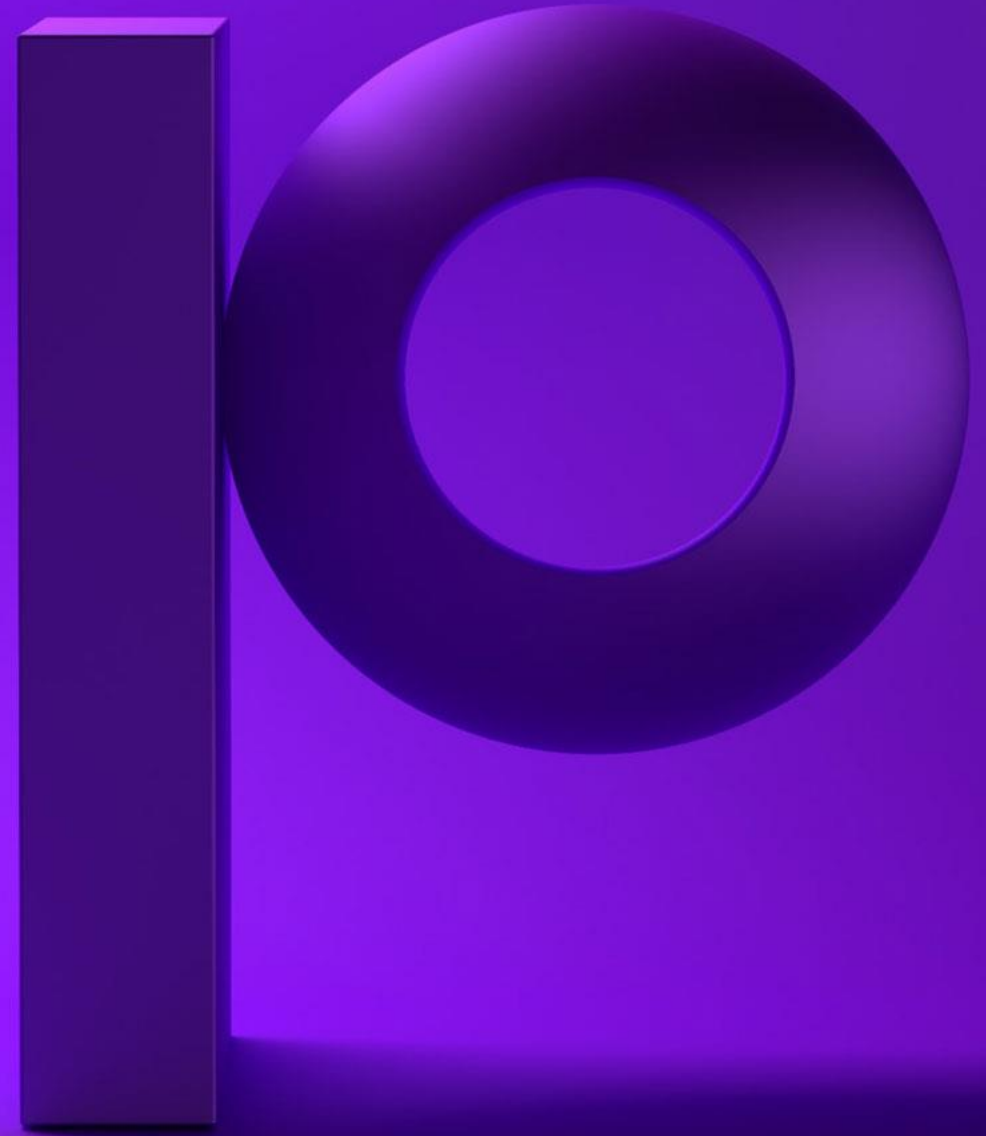


Data Governance User Group

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



Dr. Wilhelm and Dr.-Ing. E.h. Georg Schaeffler found INA

1946

Global expansion: Plants opened in Asia, North and South America

1950-1990

Acquisition of 100 percent of LuK GmbH

2000

Schaeffler becomes the majority shareholder of Continental AG

2008

Purchase of electric motor manufacturer Compact Dynamics

2016

- We pioneer motion – Start of Roadmap 2025 focusing on innovation, agility, and efficiency
- Join the global hydrogen initiative

2020

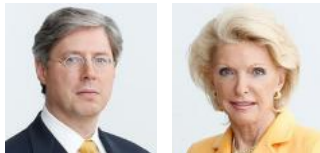
1950

Cage-guided needle roller bearing patent registered



1996

M.-E. Schaeffler-Thumann and her son G. F. W. Schaeffler take on responsibility for the business after the death of Dr.-Ing. E. h. Georg Schaeffler



2001

Acquisition of FAG Kugelfischer Georg Schäfer AG

2015

IPO of Schaeffler AG



2018

Acquisition of Elmotec Statomat to implement electric mobility strategy

2023

Voluntary public tender offer of Schaeffler AG to the shareholders of Vitesco Technologies Group AG and signing of a Business Combination Agreement



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



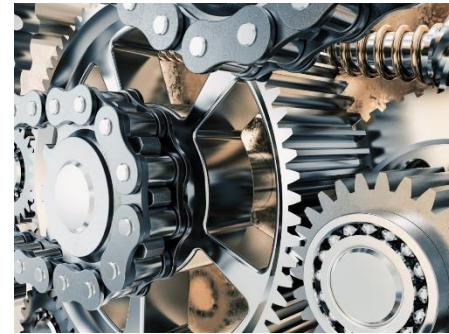
RAW MATERIALS



INDUSTRIAL AUTOMATION




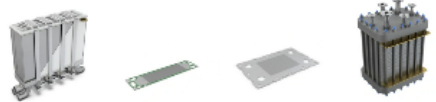




POWER TRANSMISSION



WIND



Our Product & Service Offering – Motion as the connecting element

	PRODUCT FAMILIES	PRODUCT & SERVICE OFFERING
Sustain motion	PF 6 Repair & Monitoring Services	
Energize motion	PF 5 Hydrogen Stacks & Plates	
Drive motion	PF 4 E-Motors & E-Drives	
Generate motion	PF 3 Actuators	
Transmit motion	PF 2 Transmission & Engine Components	
Guide motion	PF 1 Bearings & Linear Guides	

Key Aspects

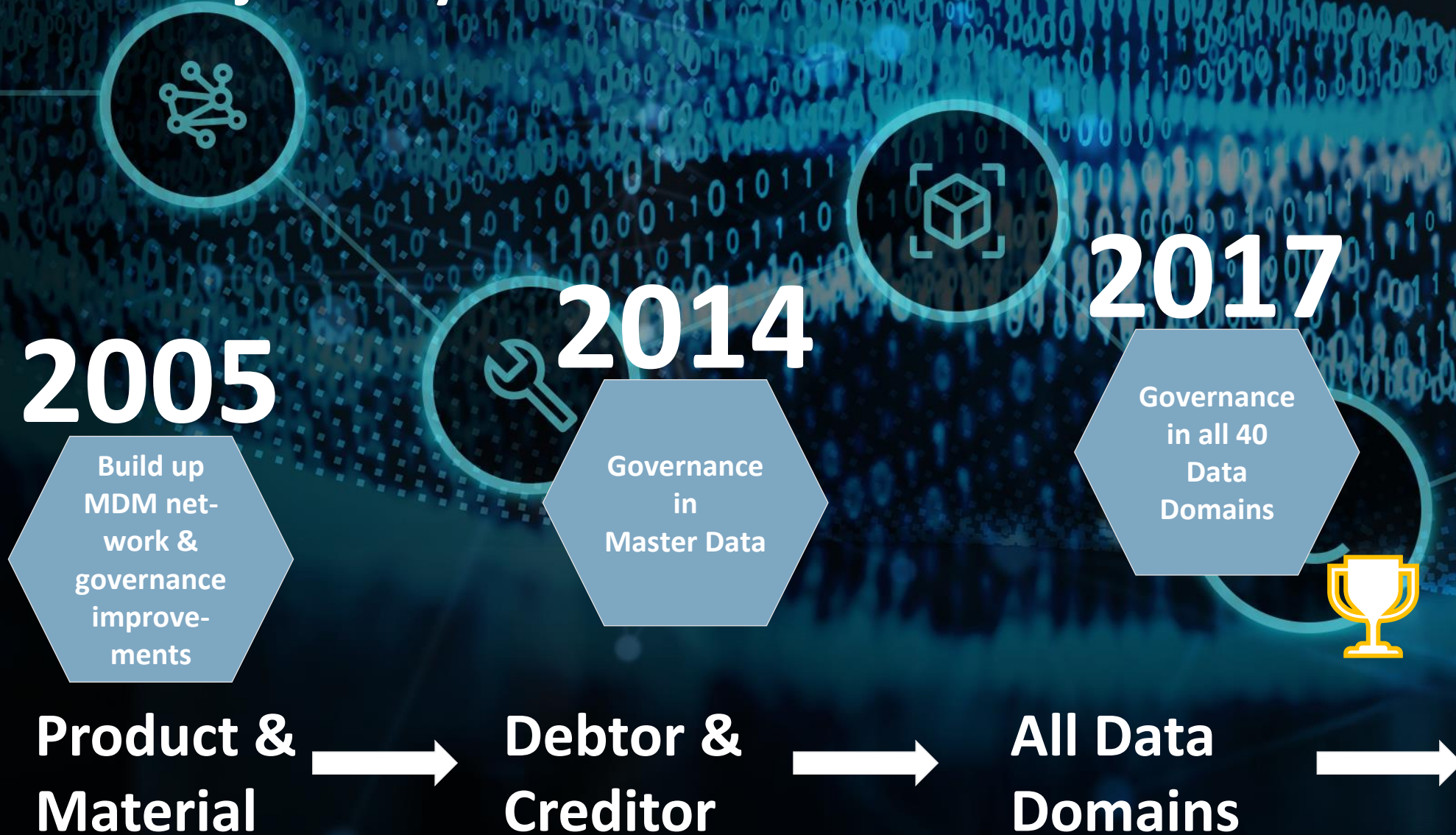
- Schaeffler product & service portfolio categorized into 6 Product families
- All product families associated with their respective notion of motion, from guide motion to sustain motion
- Product families address customer requirements along all 4 market and 10 sector clusters
- Use all the Schaeffler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

Motion as the connecting element

Agenda

- 1 Schaeffler at a glance
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- 3 Our Data Catalog Story
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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

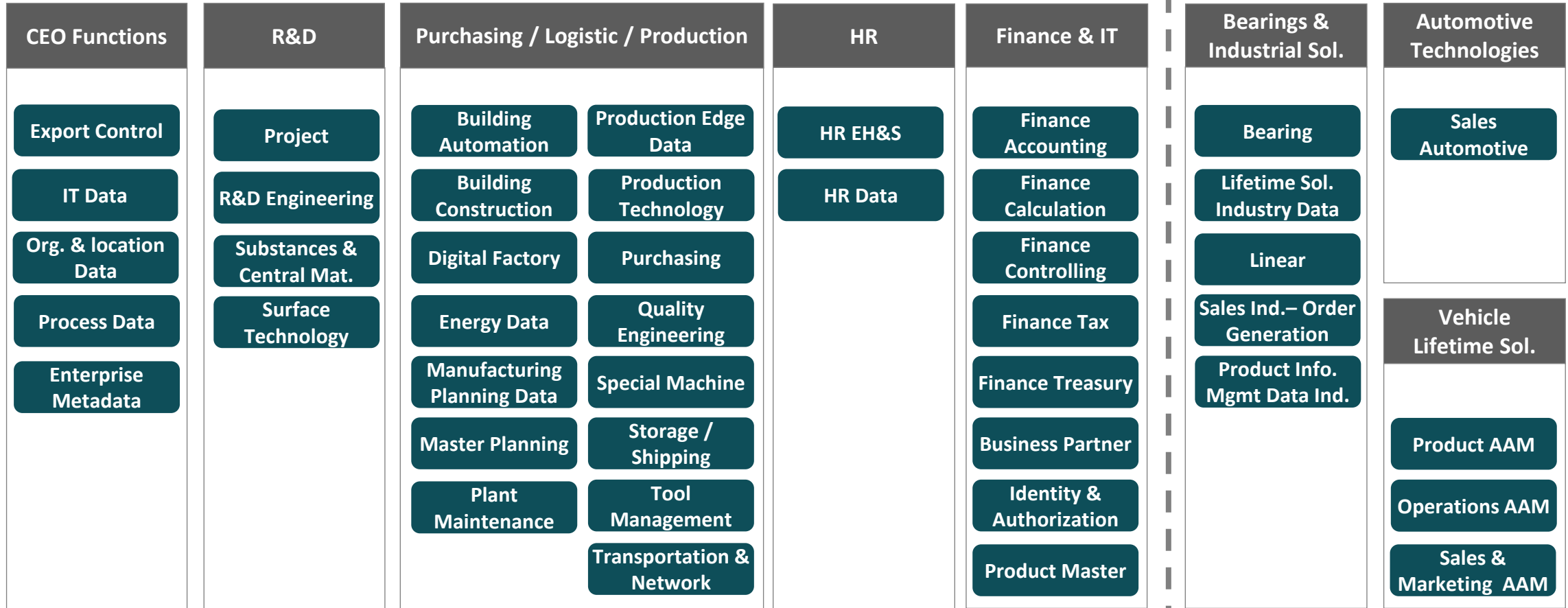
today

Further extend of Governance

AI catalog



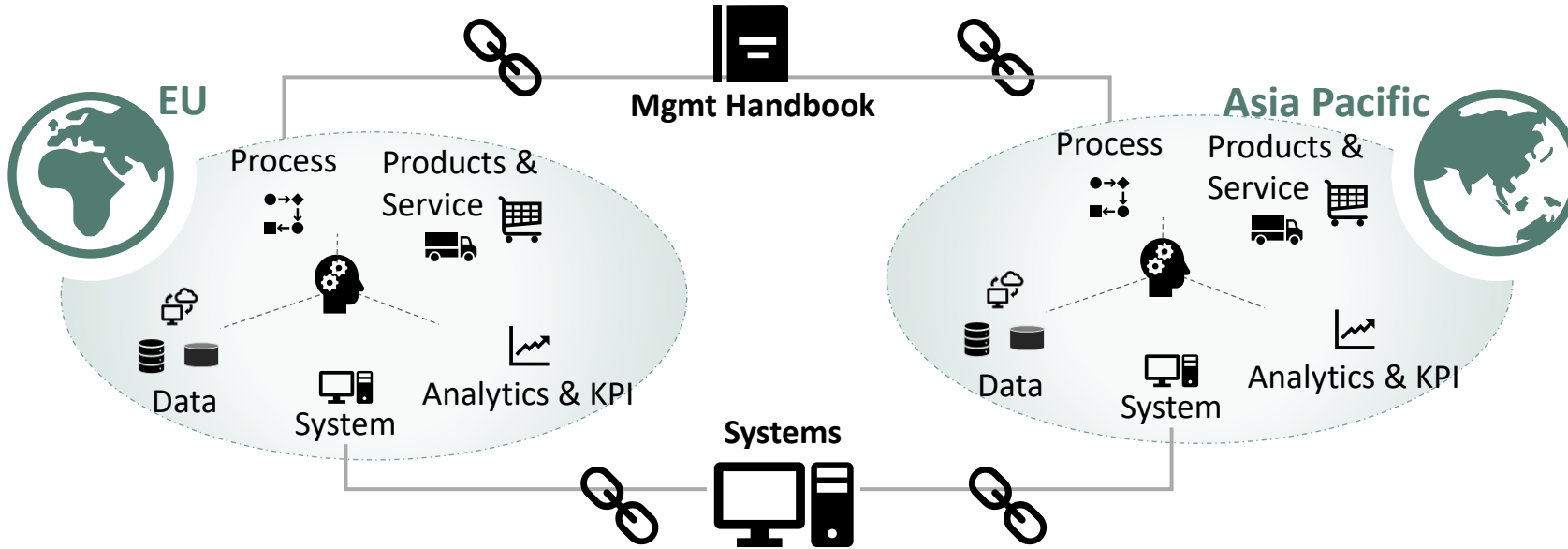
One result of our data journey - Our Data Domain overview



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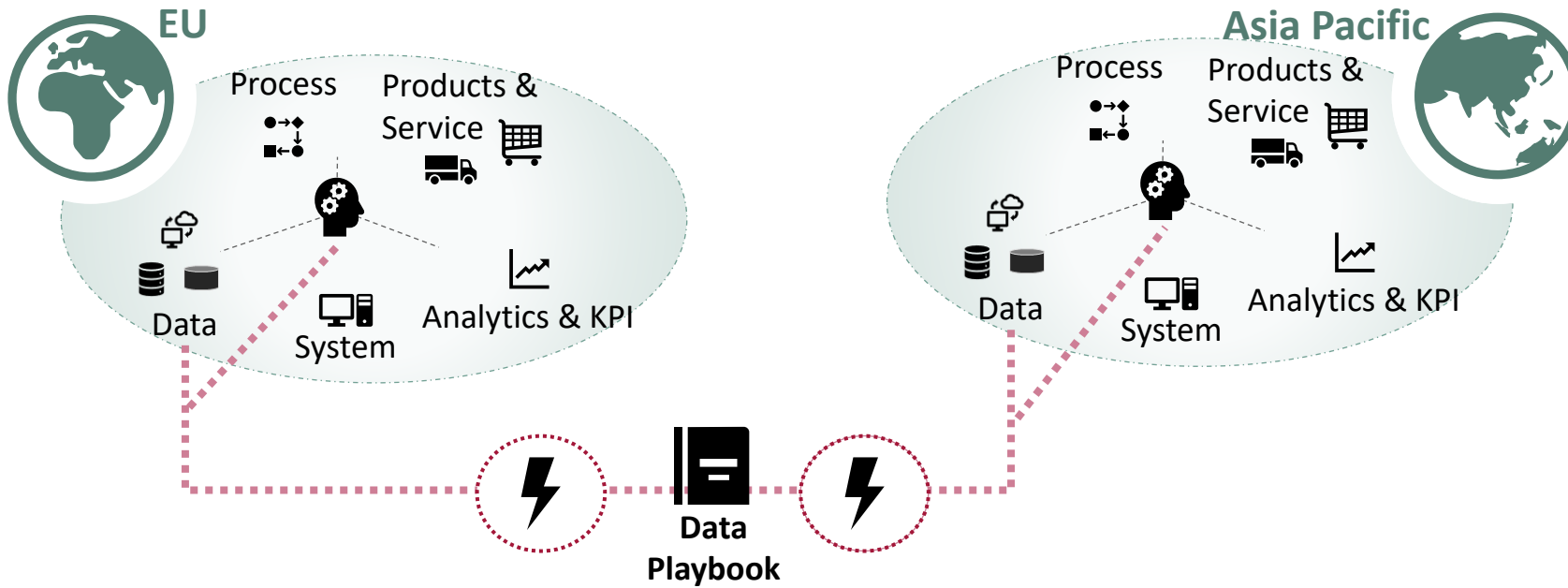
Why we needed a Data Catalog - We are working in a highly federated and agile environment with dedicated clips



Dedicated clips are already existing

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

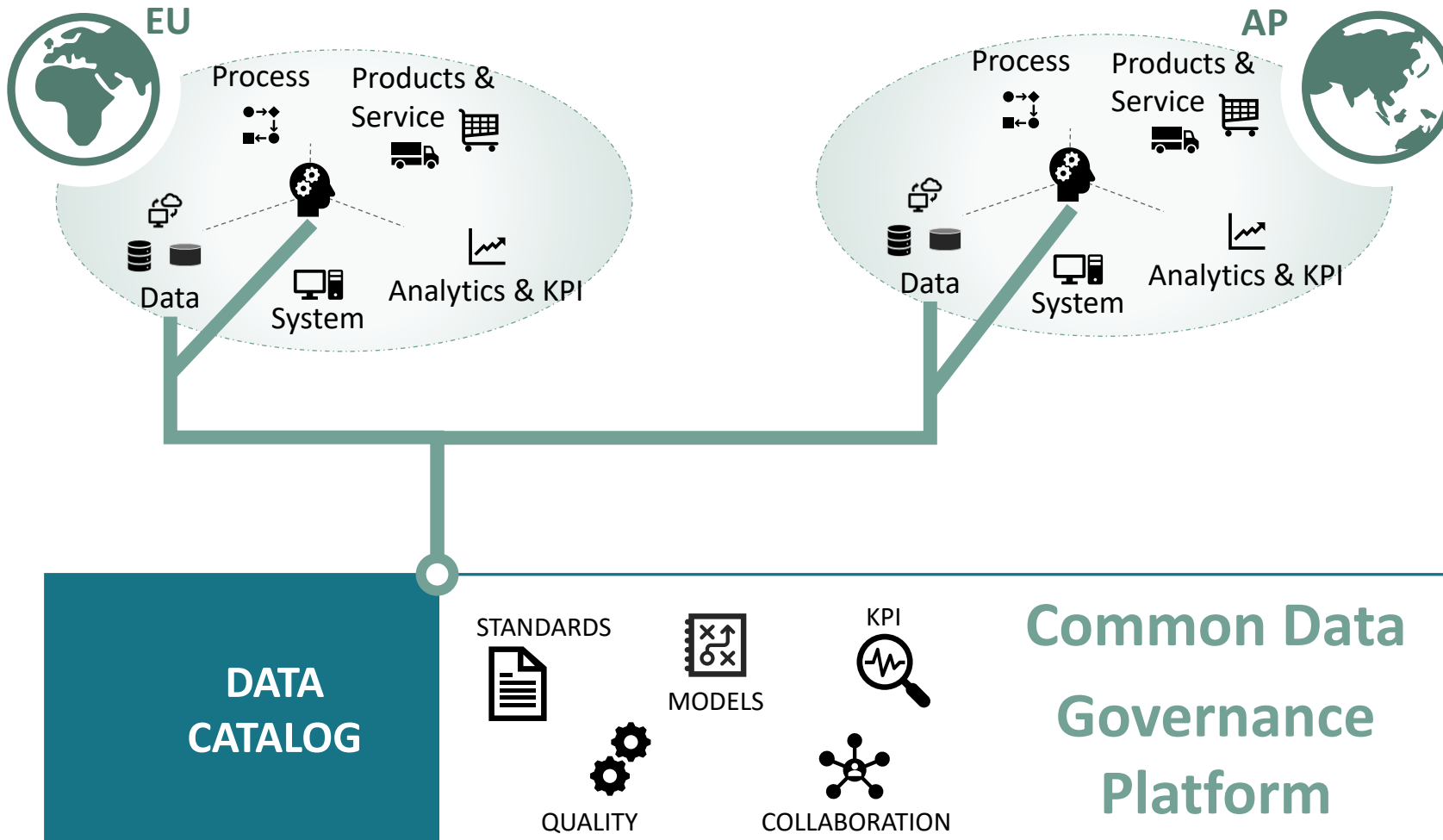
Why we needed a Data Catalog - We had no data playbook



Data is handled and understood differently

- Data Playbook = Architecture
- Understanding & usage

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



- Transparency generates efficiency
- Increased Data Quality
- Accelerated Project Delivery
- Optimized Accuracy in Analytics & Data Usage
- Regulatory Compliance
- Data Governance, efficient & standardized

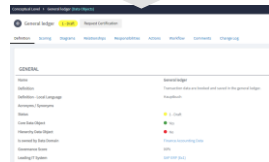
How we implement - Our three stages of Data Architecture



Business Data Objects basics

1. Name, description & hierarchy of Bus. Data Objects on conc. level
2. Security classification of data & documents
3. Personal data relevance
4. Export control relevance

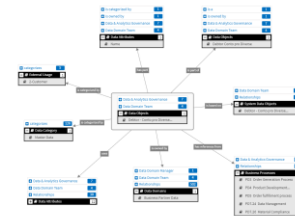
Target:
be compliance ready & useable for other domains, projects



Metadata completed

1. Bus. Data Object & attributes on conceptual & logical layer
2. Rules & quality requirements
3. Maintenance processes & process integration
4. Reference lists
5. Deletion / retention periods

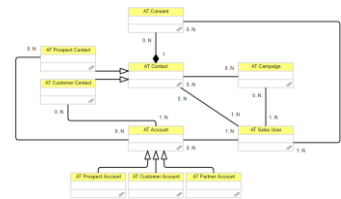
Target:
full governance



Data Model & Landscape

1. Bus. Data Objects transferred from DATA360 to BiZZdesign
2. Relations designed
3. Cardinalities maintained
4. Data flows & storage described

Target:
complete transparency & integration



Live demo : Data Domain

[Data Catalog - Data360 - Home \(data3sixty.com\)](https://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 responsables >> implement their scope together

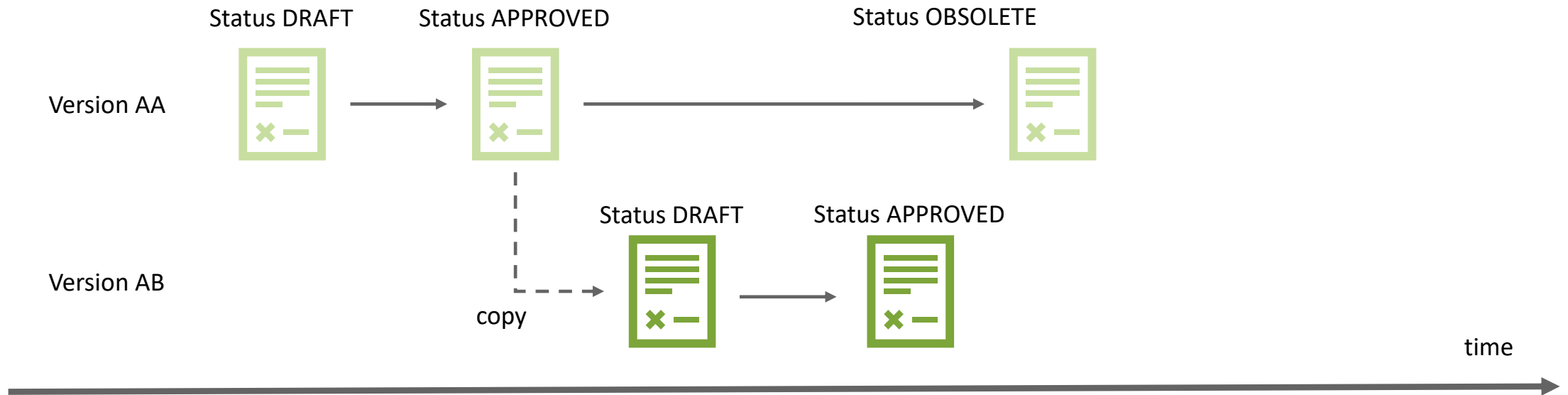
Involve the whole team to implement your concept (not just a few)

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Challenges – Where we require Precisely’s support

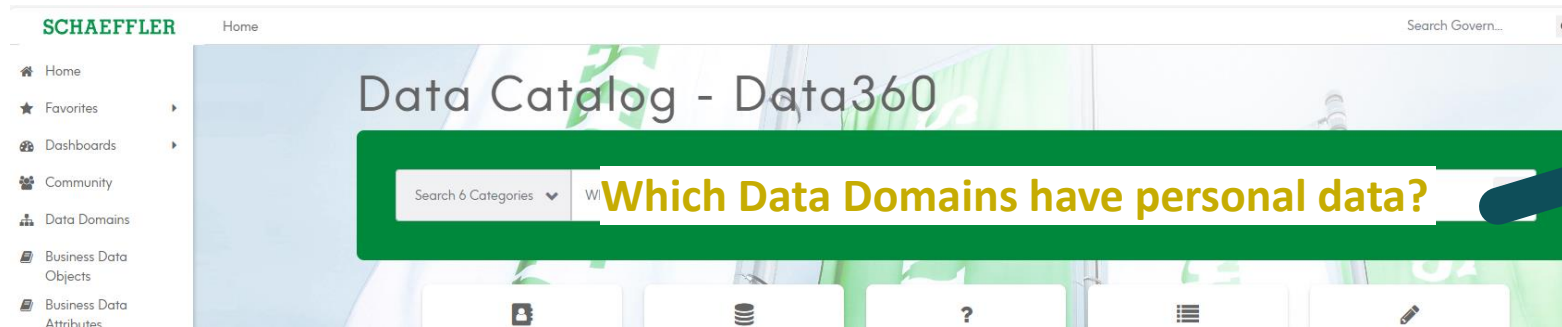
- Versioning



- 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 node: 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

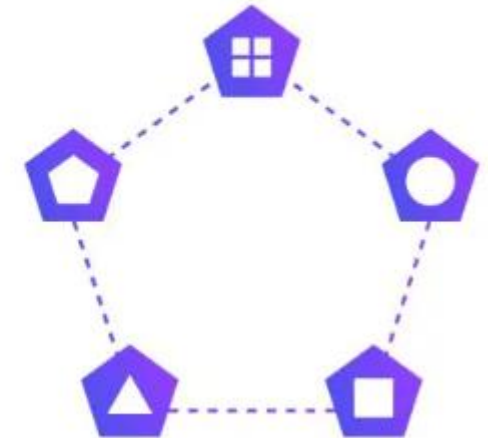
Modernizing Data360 Govern to:

- 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

Monolith



Microservices



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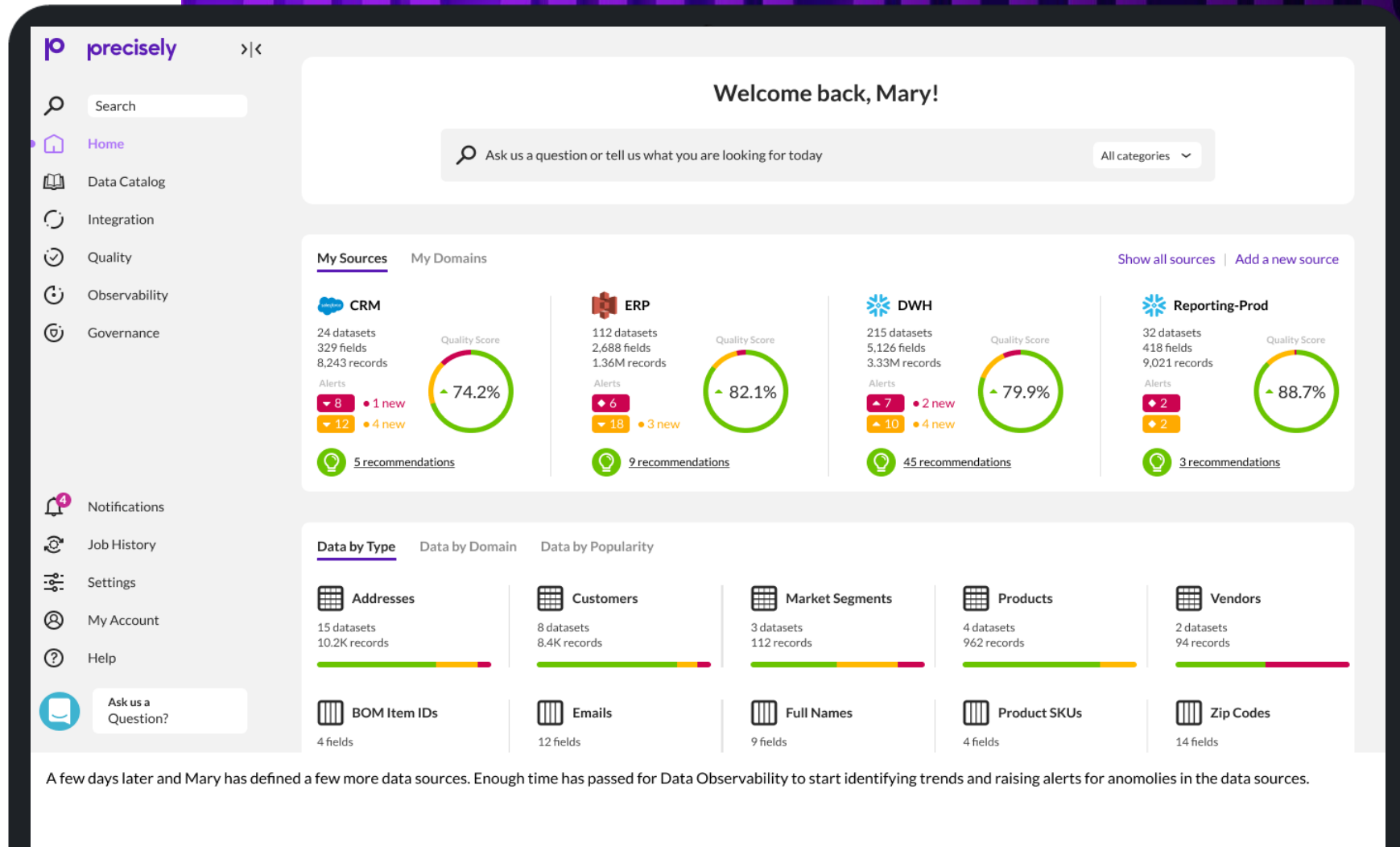
Data Governance Roadmap

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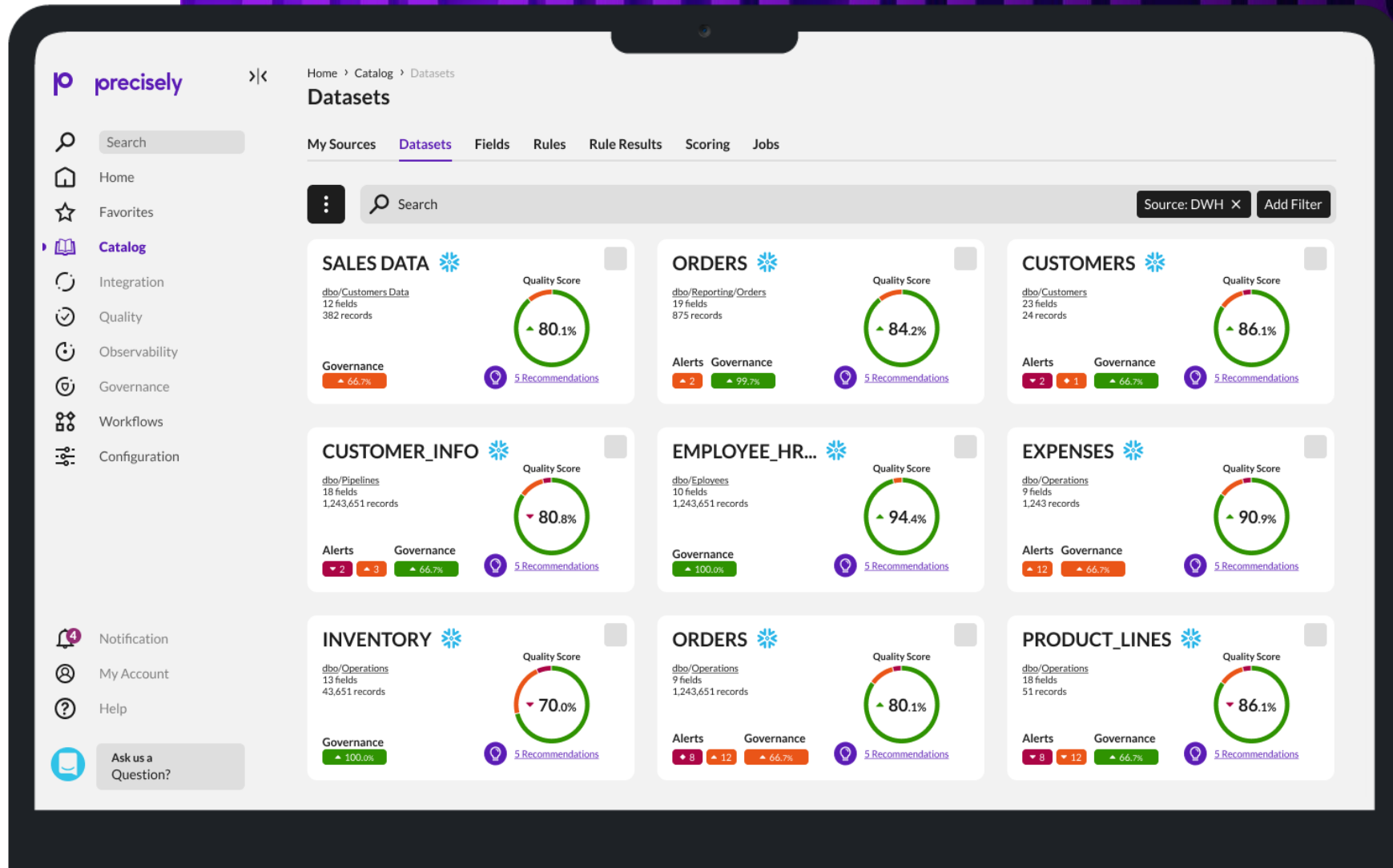
Persona-based and personalized homepage that can be configured to drive insights and recommendations.



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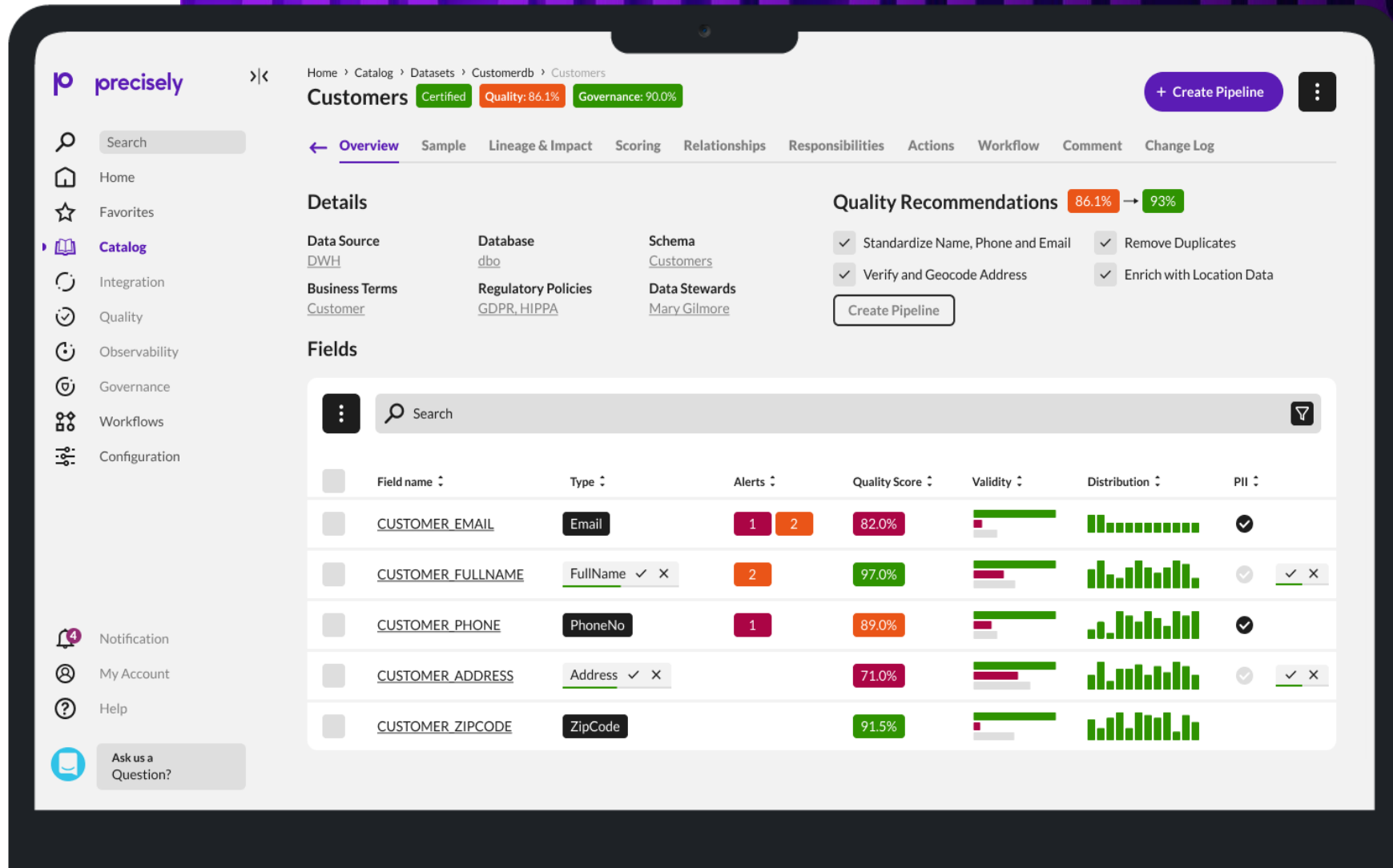
Streamlined, context-sensitive catalog view of datasets, inclusive of data quality, governance, and observability alerts and quick link to targeted recommendations.



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



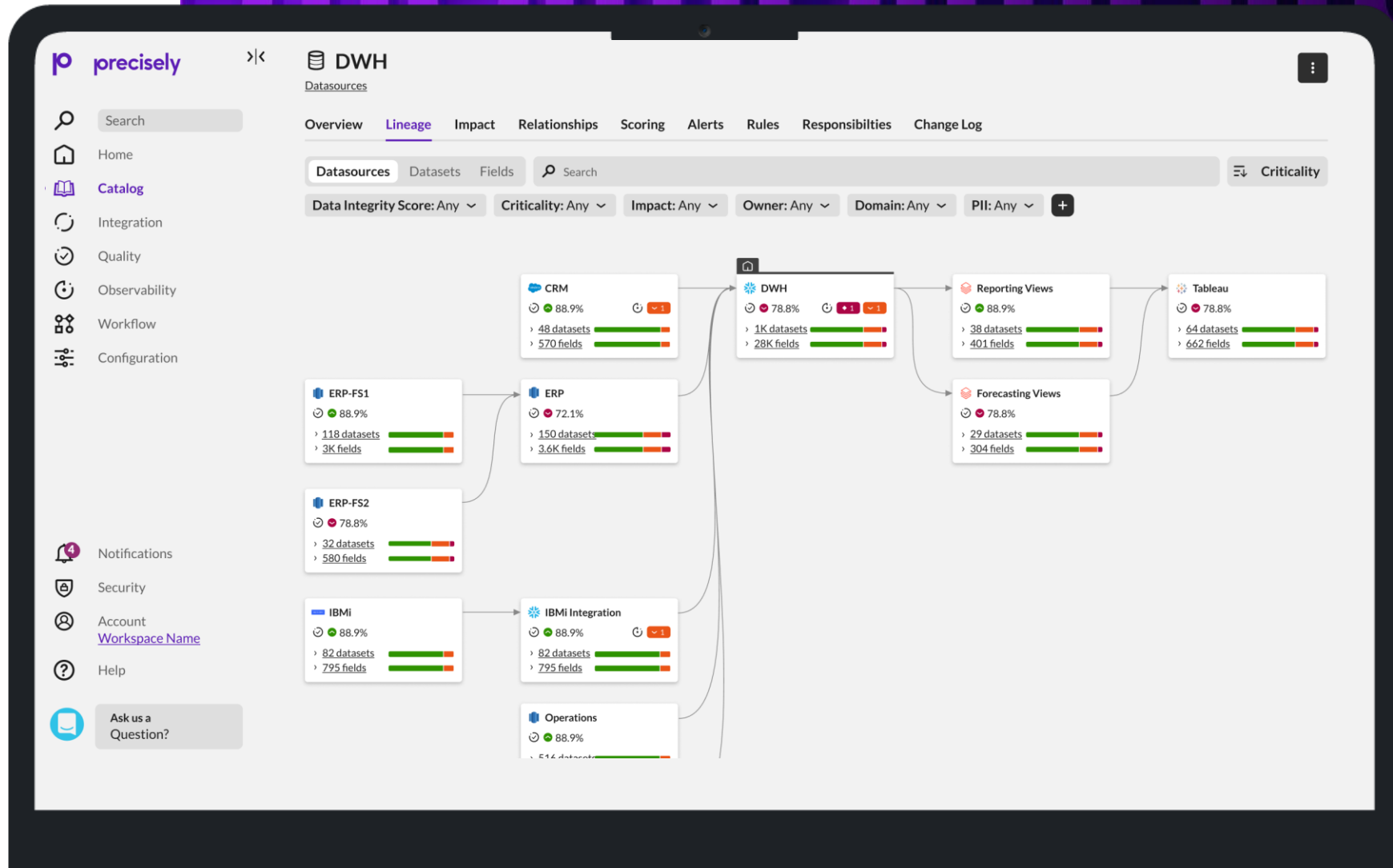
The screenshot displays the 'Customers' dataset overview in the Data Integrity Suite. The interface includes a sidebar with navigation options like Home, Favorites, Catalog, Integration, Quality, Observability, Governance, Workflows, and Configuration. The main content area shows the dataset's metadata, including Data Source (DWH), Database (dbo), Schema (Customers), Business Terms (Customer), Regulatory Policies (GDPR, HIPAA), and Data Stewards (Mary Gilmore). A 'Quality Recommendations' section shows a target of 93% and current quality of 86.1%, with checkboxes for actions like 'Standardize Name, Phone and Email', 'Remove Duplicates', 'Verify and Geocode Address', and 'Enrich with Location Data'. Below this is a table of fields with their quality scores and alerts.

Field name	Type	Alerts	Quality Score	Validity	Distribution	PII
CUSTOMER_EMAIL	Email	1 2	82.0%			✓
CUSTOMER_FULLNAME	FullName ✓ X	2	97.0%			✓ X
CUSTOMER_PHONE	PhoneNo	1	89.0%			✓
CUSTOMER_ADDRESS	Address ✓ X		71.0%			✓ X
CUSTOMER_ZIPCODE	ZipCode		91.5%			

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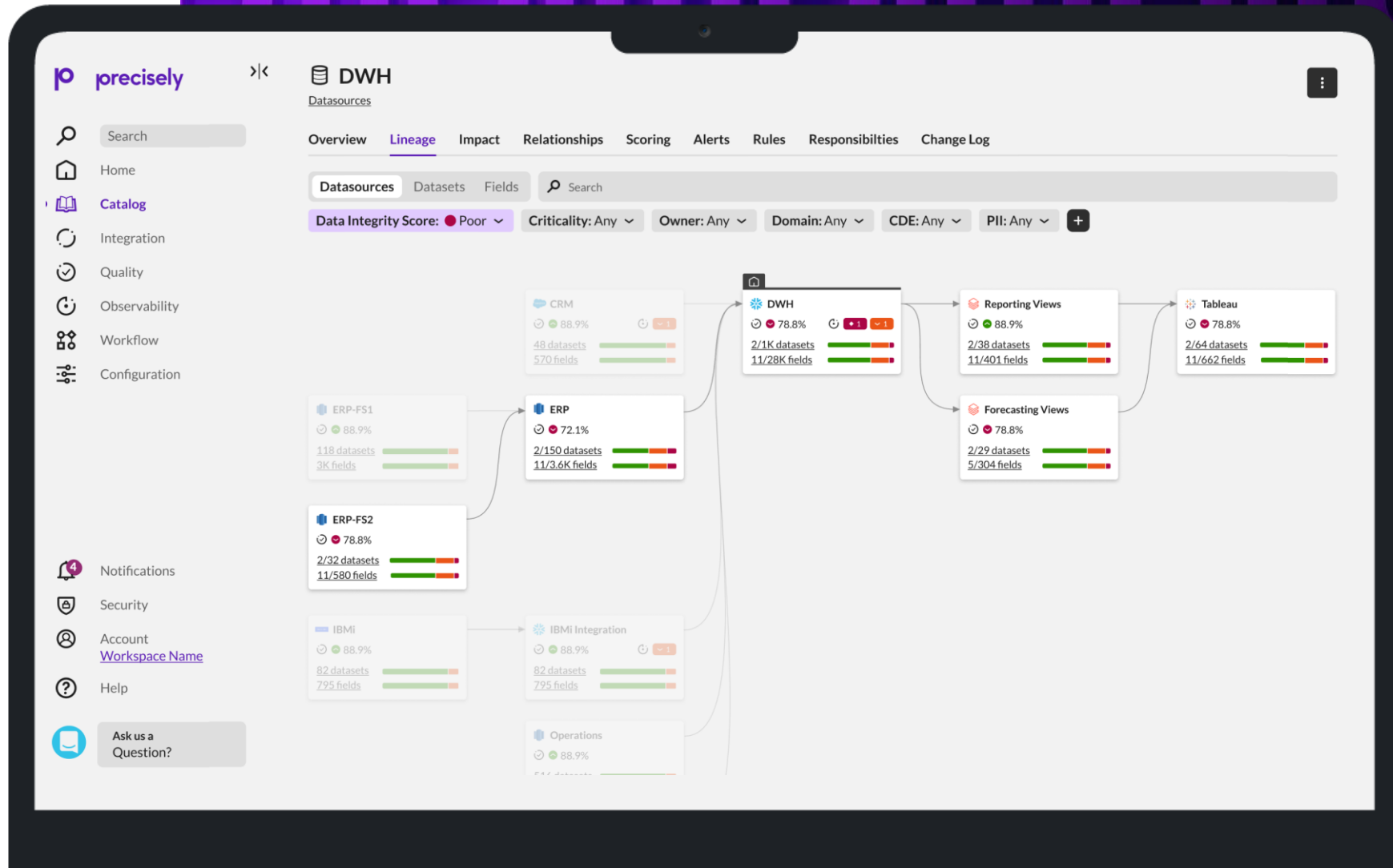
Simplified lineage diagrams to reduce complexity and easily determine the provenance of data.



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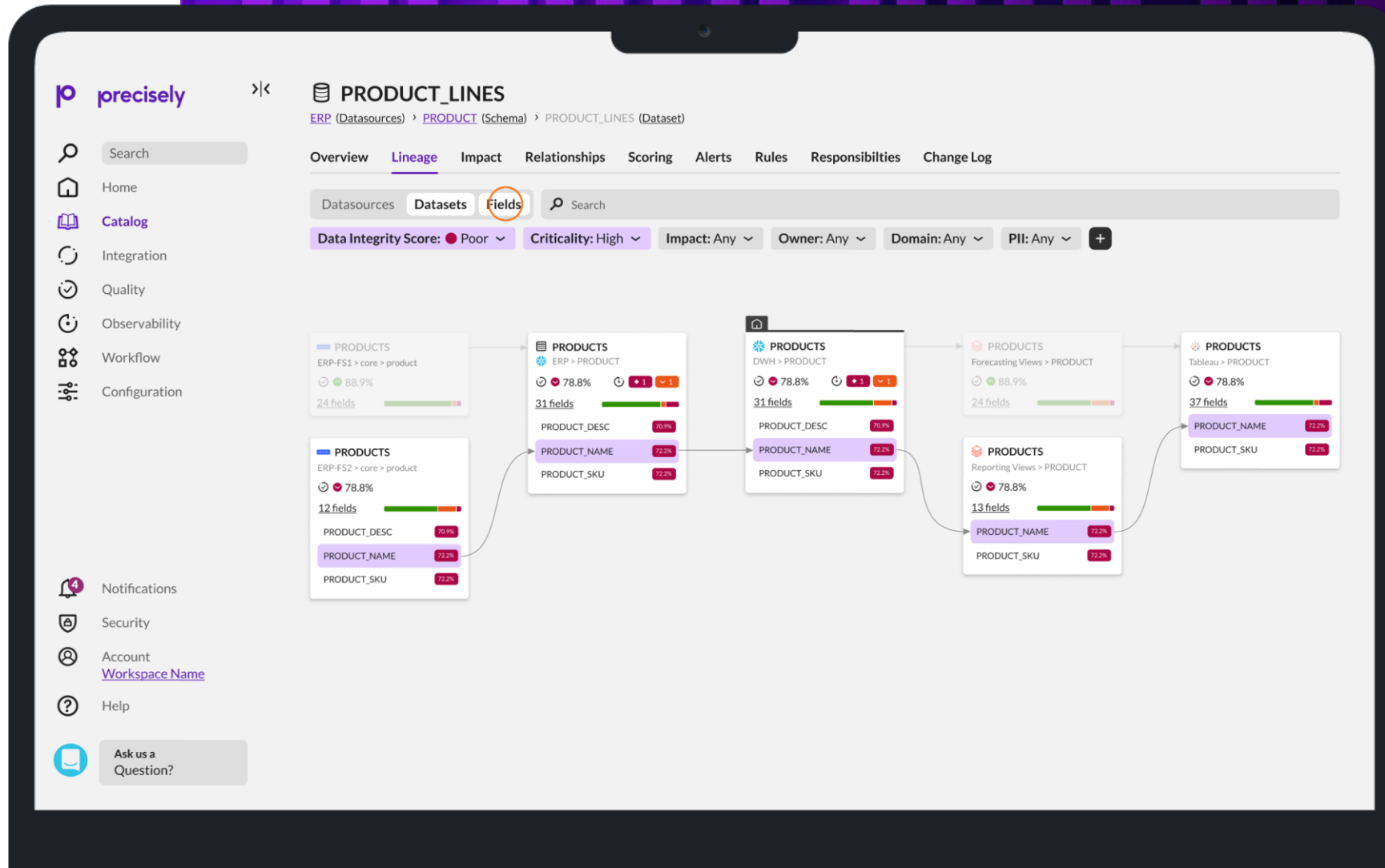
Dynamic filtering of lineage diagrams based on technical and business asset values/configuration.



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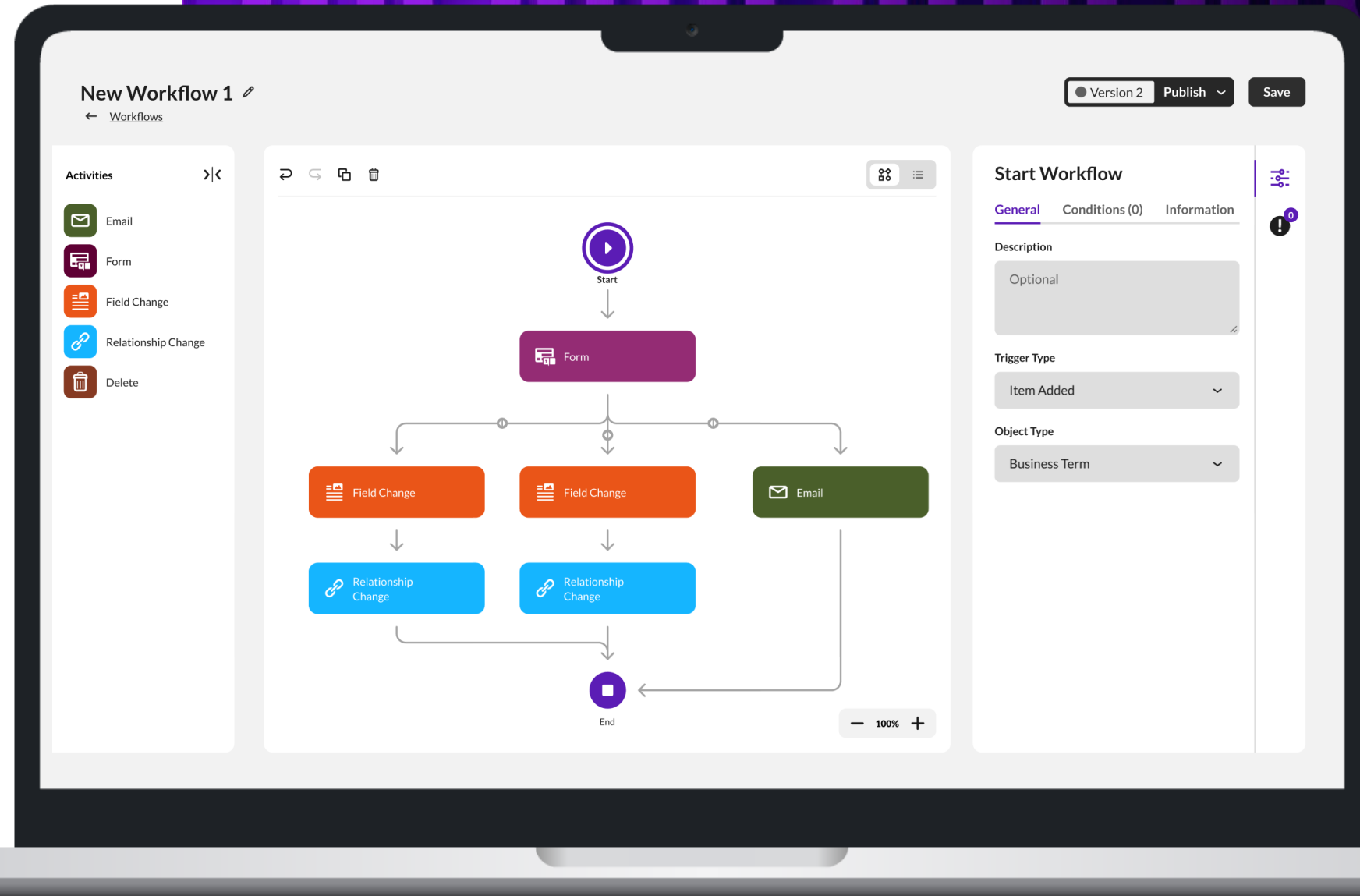
Interact with lineage diagrams to view data observability and data quality results and take follow on actions.



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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

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 Fields by criteria Specific datasets

- DWH_SNOWFLAKE > ORDERS > ORDERS > BILLING_DATE
- STRACK > ORDERS > DATE_BILLING
- RWH > ORDERS > ORDERS > BILLING_DATE

Reference Fields

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

Pass Conditions Filter Group By Aggregate By

Basic 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

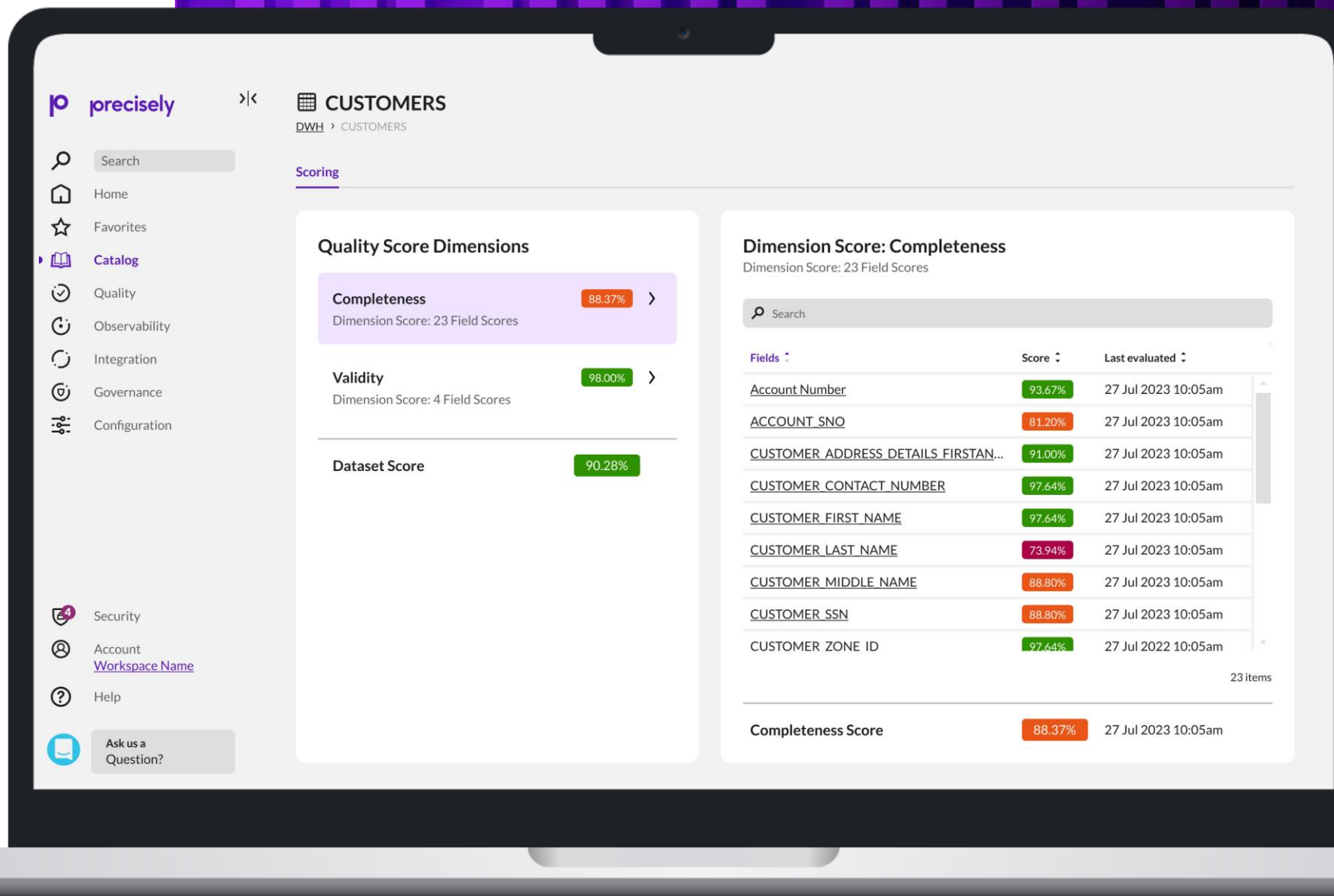
Search All X

CONCAT
Returns the concatenation (or joining) of two values, converting the input values to strings as necessary. Equivalent to using the & operator on strings.

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



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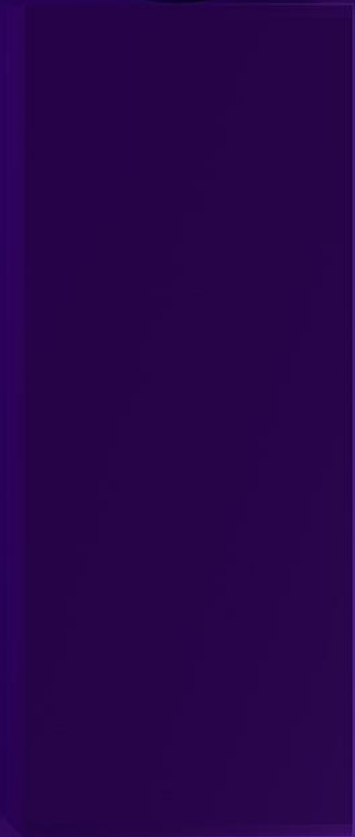
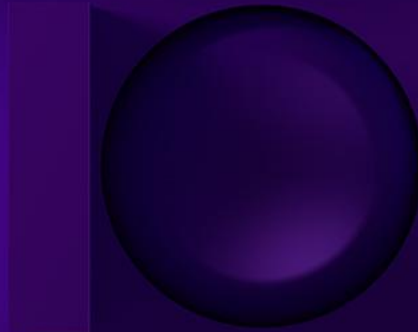
AI: Enhanced Search and Curation

- 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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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

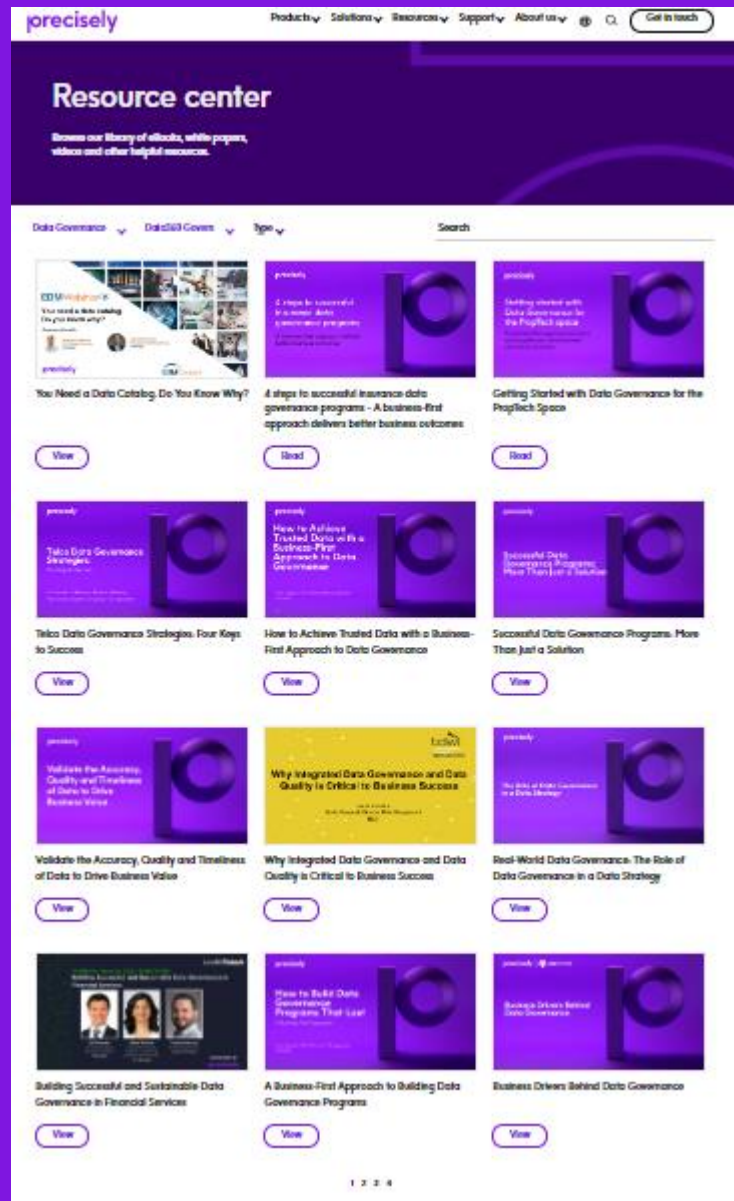
The screenshot shows the 'Precisely Ideas' community portal. At the top left is the 'precisely' logo. To its right is the title 'Precisely Ideas' and a welcome message: 'Welcome to the Precisely Ideas Community. This portal is intended to provide you with an open and collaborative channel to submit your 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 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 are links for 'My ideas' (0), 'My votes' (0), and 'My subscriptions' (0). Below these is a 'FILTER BY STATUS' section with 'New' (72) and 'More Information Requested' (5) options. At the bottom left, 'Not Implementing at this time' is listed with 23 items.

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' in a box with a 'VOTE' button. 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' under the category 'Data Governance'. There is a 'New' button and a comment icon with '0' next to it. The second idea is partially visible, titled 'Restrict users who can activate a workflow based on the relationship of the'.

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

HINT: Filter by Data Governance



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

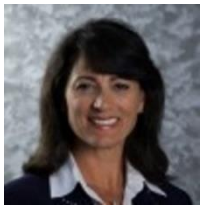
Upcoming Events

- 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
Stotzer



Cheryl
Vogler



Christina
Costello



DeeDee
Jimenez



Jennie
Richardson



Liz
Dorner



Liz
Wright



Younes
Benhaddou



Ben
Hayhurst



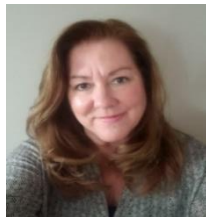
Mitch
Williams



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



Thank You

precisely