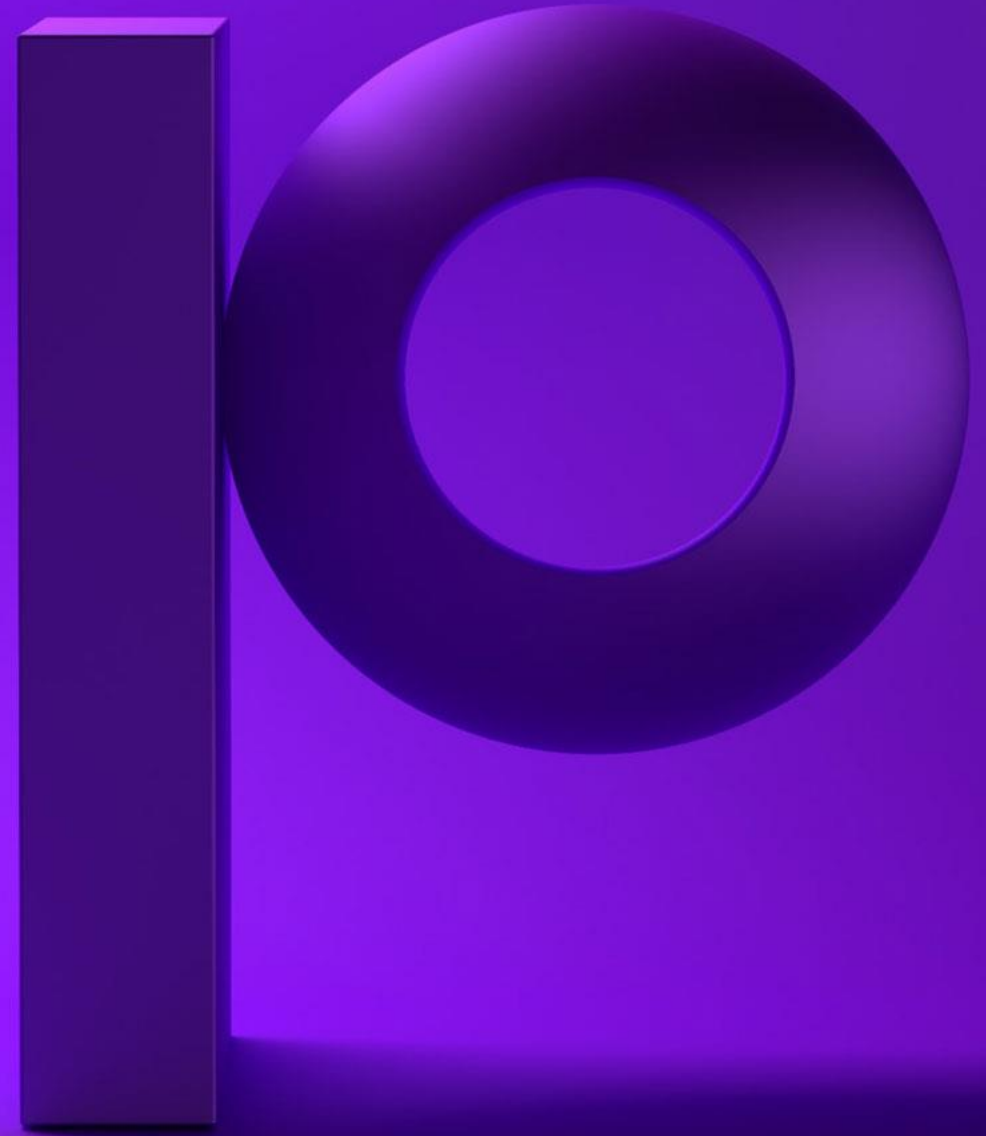


**Thank You For
Joining Us**

**The Meeting Will Begin at
11:00am EST**



Data Governance User Group

March 27, 2025



ON24 Interface Overview

precisely

Content not available or is still being processed

Thank You For Joining Us

The Meeting Will Begin at 11:00am EST

- Data Governance User Group Resource Page
- Precisely Data360 Govern Knowledge Community
- Suite Momentum Announcement
- CIO/CDO Announcement
- Precisely Resource Center

Send a message

Enter your question Submit

POWERED BY ON24

io

Navigation icons: Home, List, Profile, Chat, Smile, Hand 1, Hand 2

Agenda

1

Data
Governance:
Modernization
Session

-Danielle McQuaid
& Ken Beutler

2

Announcements &
Wrap Up

-Sue Pawlak
& Matt Malczewski

Ken Beutler



Vice President of Product Management |
Precisely

Ken Beutler is the Vice President of Product Management responsible for the Data Governance product line. He has 20 years of experience in the data integration, data quality, data governance and data 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.

Sue Pawlak



Director, Product Marketing | Precisely

Sue brings over 15 years of experience in orchestrating comprehensive marketing strategies and leading high-performing marketing teams. Her passion lies in crafting clear messaging that is not full of jargon and technobabble that resonates equally with both business and technical audiences, ensuring that value-driven solutions are communicated effectively at every level.



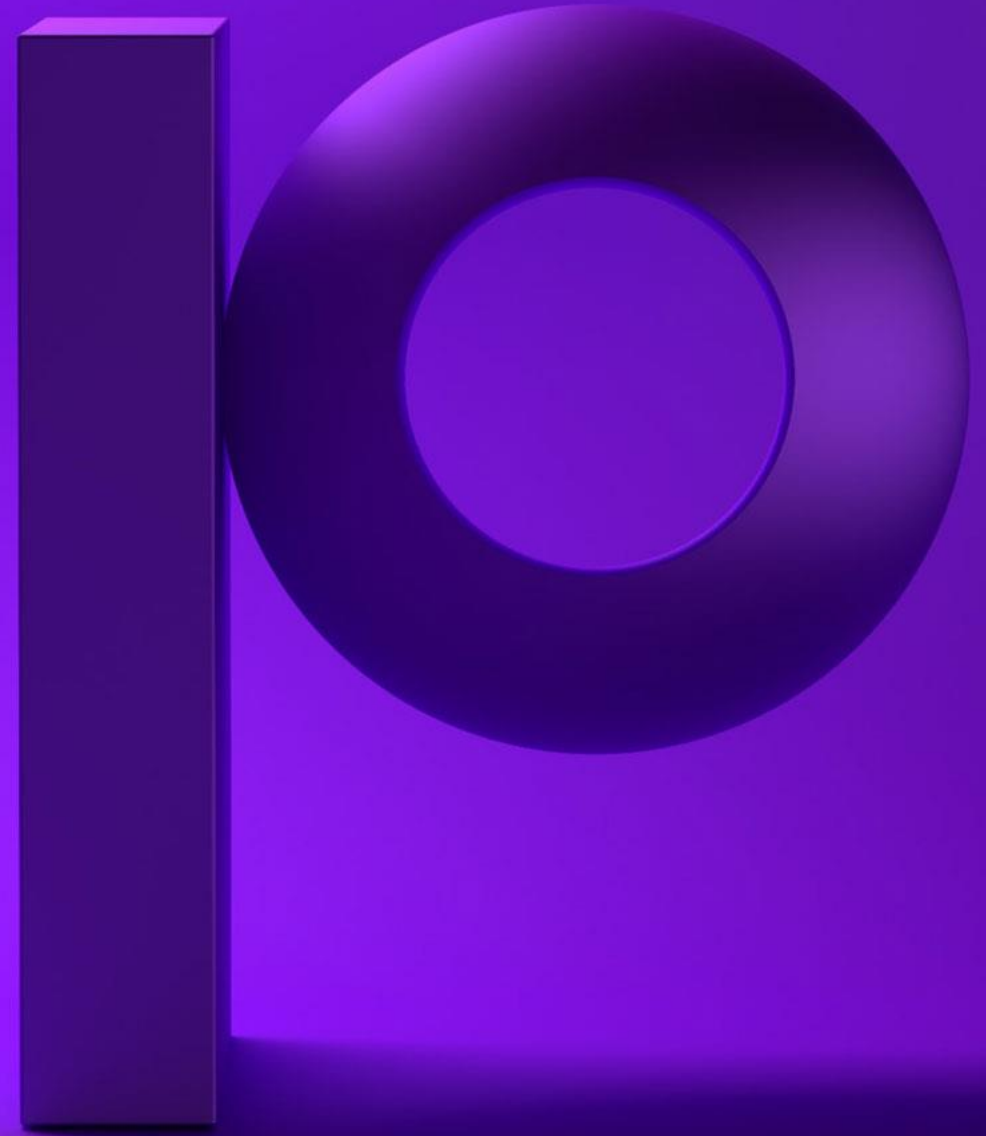
Data Governance

Modernization Session

March 27, 2025

Danielle McQuaid | Product Owner, Precisely

Ken Beutler | Vice President of Product Management, Precisely



Agenda

- Data Integrity Suite – Data Governance Update
- Design Partner Program
- Upgrade Planning Update
- Demos

Data Integrity Suite Progress

- **D360 Govern Feature Port**

- Manage business and technical assets
- Manage predicates, Relationships and Ref. Lists
- Manage models and policies
- Semantic types and tags
- Bulk loading assets (June)
- Comments and collaboration

- **Data Catalog**

- Card/List views of technical assets
- Search/Filter/Sort views
- Seamless catalog navigation

- **Workflow**

- Modernized workflow designer
- Email, form, field change, relationship change and delete activities
- Conditions and conditional transitions
- Scheduled workflows
- Request certification (May)

- **Connectivity**

- Databricks, Snowflake, Redshift, GBQ, Tableau Cloud,
- Oracle, Postgres, MySQL, Azure Synapse, SQL Server via on-premises agent
- Continued integration with 2 new connectivity partners
- Analyze-based connectors (June+)

- **Data Lineage**

- Datasource level lineage
- Dataset level lineage
- Field level lineage
- Lineage tracing (April)
- Searching/Filtering/Sorting (April)

- **Data Quality Rules**

- Create, manage and execute basic OOTB and custom DQ rules
- Generate DQ scores for fields aggregated up to datasources
- View pass/failed records
- Rule reuse with automated/manual mapping

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	

AI/ML Growth in the Data Integrity Suite

Natural Language Search

Enter queries in everyday, conversational language beyond simply keywords to better convey intent.

Business Asset Recommendations

Automatically suggest related and contextual business assets for technical assets to reduce manual overhead when onboarding new data or curating the data catalog

Classification & Semantic Tagging

Automate suggestions for classification and semantically tagging metadata to provide greater content and meaning.

Data Profiling & Suggestions

Profile data and metadata and receive automated data quality suggestions to achieve highest possible quality data.

Asset Description Generation

Automatically suggest descriptions based on existing information and patterns to reduce manual work.

Bring Your Own LLM

Enhance security and compliance with internal policies and leverage their unique data, industry terminology, and business needs into the model.

Design Partner Program

- Private access for customers to try Data Integrity Suite offerings
- Customers can test real world scenarios, and use within their environment (where applicable)
- Co-innovation with Precisely on key use cases, UX, and use case exploration
- Free to participate

The screenshot displays the Precisely Data Integrity Suite interface. The top navigation bar includes Home, Catalog, Governance, Observability, Spatial Analytics, Quality, Integration, and Workflow. The main dashboard features a central graphic of a data lake and four key sections: Catalog, Integration, Observability, and Governance. Below these, a 'Quality' section is visible. The 'Governance' section is expanded to show a table of Business Assets.

Name	Description	Asset Count
Business Concepts	-	2
Business Term	The Enterprise Business Terms are intended to support documenting the terms, phrases, and acronyms used by the business as part of everyday operations. The primary purpose is to be able to associate the Business Terms with the technical objects defined in the Field Names and other...	15
Glossary	The Glossary is a collection of terms used in an organization that require specific definitions and governance.	13
LA Demonstration Asset	-	1
MB Business Terms	-	3
MB Glossary	-	3
Objective	Objectives describe the things that an enterprise might want to achieve or attain. They have measurable targets and explicit time frames. The intent of Objectives is to document the near-term and long-term objectives. The objectives could be driven by a business or technical goal.	6
Product Class	A class is a group of products that are similar in features or attributes.	16
Product Department	A department is responsible for the development and distribution of a specific product line.	8
Product Vertical	A vertical is a business niche where a company's products are designed for a specific industry.	6

Program Phases

	Phase 1	Phase 2	Phase 3
	Learn & Provide Feedback	Use Case Exploration	Upgrade Planning
Objective	Learn capabilities and provide user feedback on the initial data governance features available in the Data Integrity Suite	Enable exploration of customer data sets to achieve predetermined business objectives using data quality and/or data observability	Start planning the upgrade to Suite Governance and identify critical product deltas
Success Criteria	<ul style="list-style-type: none"> • Feature & workflow feedback • End user training 	<ul style="list-style-type: none"> • Feature & workflow feedback • Predefined prior to start 	<ul style="list-style-type: none"> • Clarity into the current D360 Govern environment, usage and integrations • Identification of critical product deltas
Enablement	<ul style="list-style-type: none"> • One 1-hr guided hands-on workshop • Three Program Process Check-ins 	<ul style="list-style-type: none"> • One 1-hr guided hands-on workshop • Two Program Process Check-ins 	<ul style="list-style-type: none"> • Two upgrade planning sessions with Professional Services and PM
Environment	Precisely Managed Customer Sandbox with Curated Demo Data	Precisely Managed Customer Sandbox (Curated or Customer Data)	Precisely Managed Customer Sandbox (Curated or Customer Data)
Contract	Free	Free	Free

Data360 Govern Upgrade Planning (in progress)

* Milestones and timelines subject to change

PLANNING STEPS (2024/25)

ENGAGEMENT STEPS (2025/26)

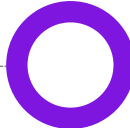
Planning

Scoping

Development

Upgrade

Hypercare



Q2/Q3

Q4/Q1

Q2-Q4

- Customer usage analysis
- Document feature use by customer
- Prioritize features for development

- Provision DIS environments for early access customers
- Create upgrade, tooling and feature backlog
- Launch design partner program

- Implement data migration tooling/services
- Develop release plans
- Remediate critical deltas in product functionality
- Test upgrade on Precisely's internal D360 Govern environments
- Test upgrade on selected customer DEV/UAT environments



Demos

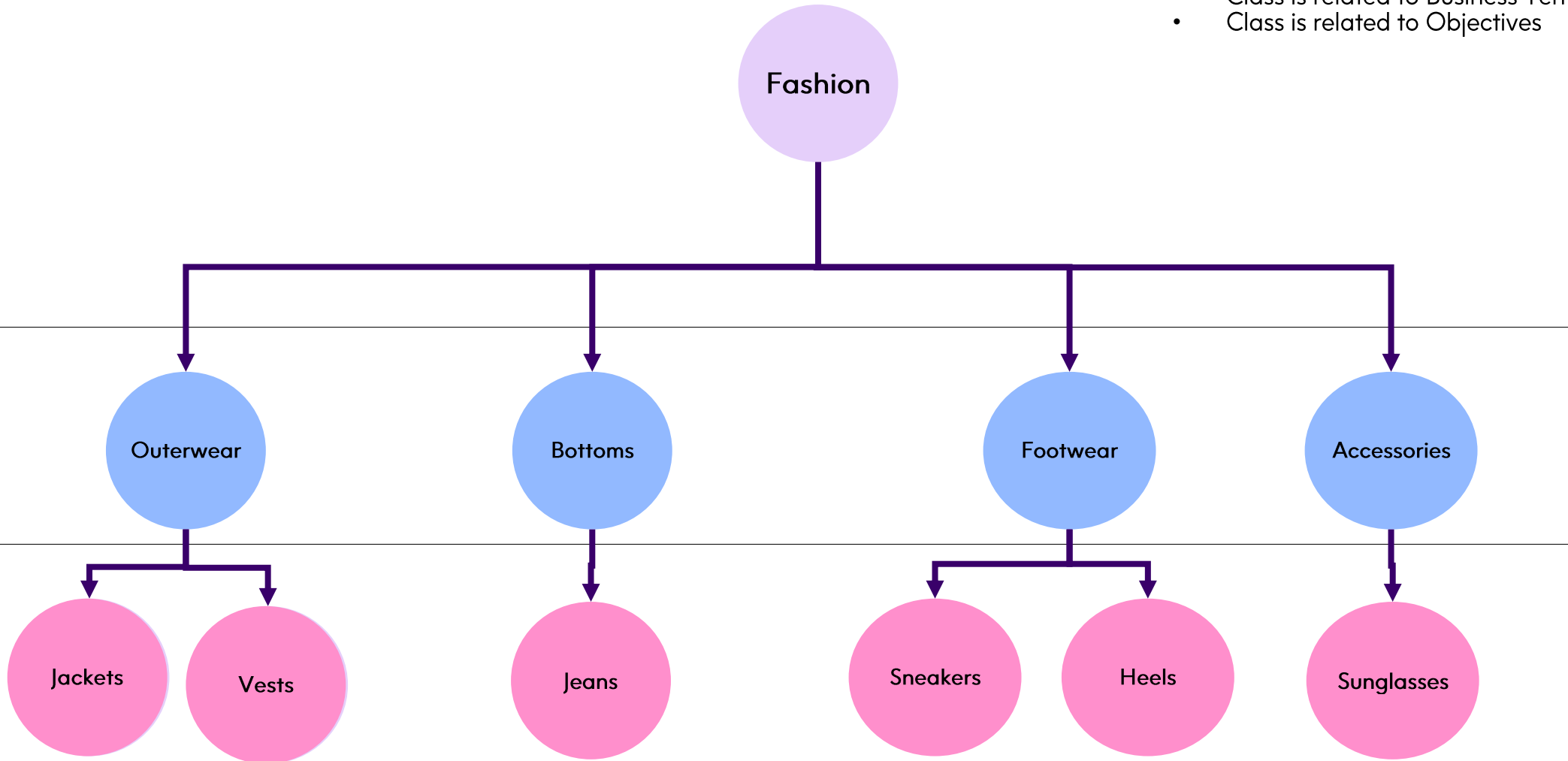


Business Flexible Metamodel

Original Customer Metamodel

Relationships

- Vertical is related to Business Terms
- Department is related to Business Terms
- Class is related to Business Terms
- Class is related to Objectives



New Customer Metamodel

Relationships

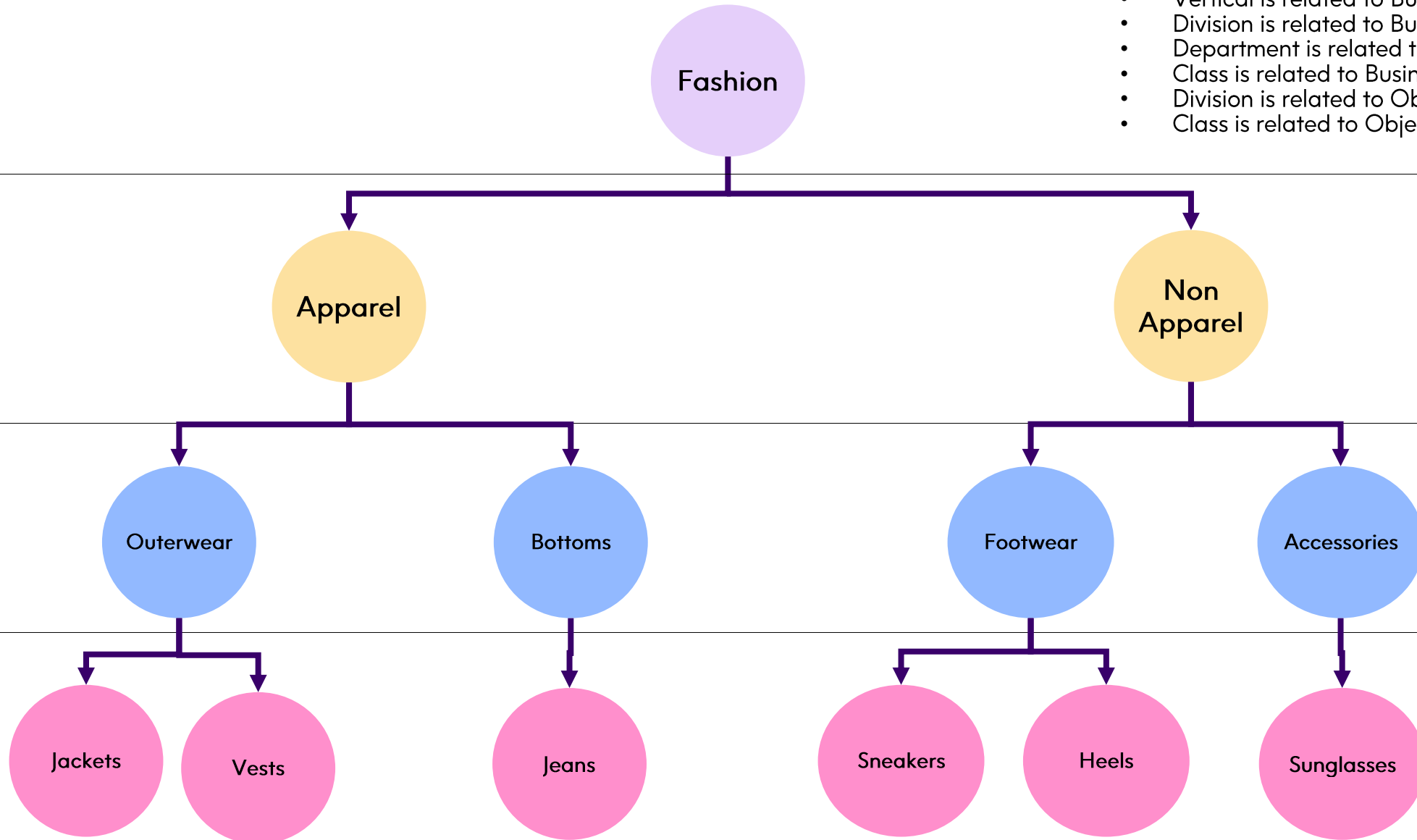
- Vertical is related to Business Terms
- Division is related to Business Terms
- Department is related to Business Terms
- Class is related to Business Terms
- Division is related to Objectives
- Class is related to Objectives

Vertical

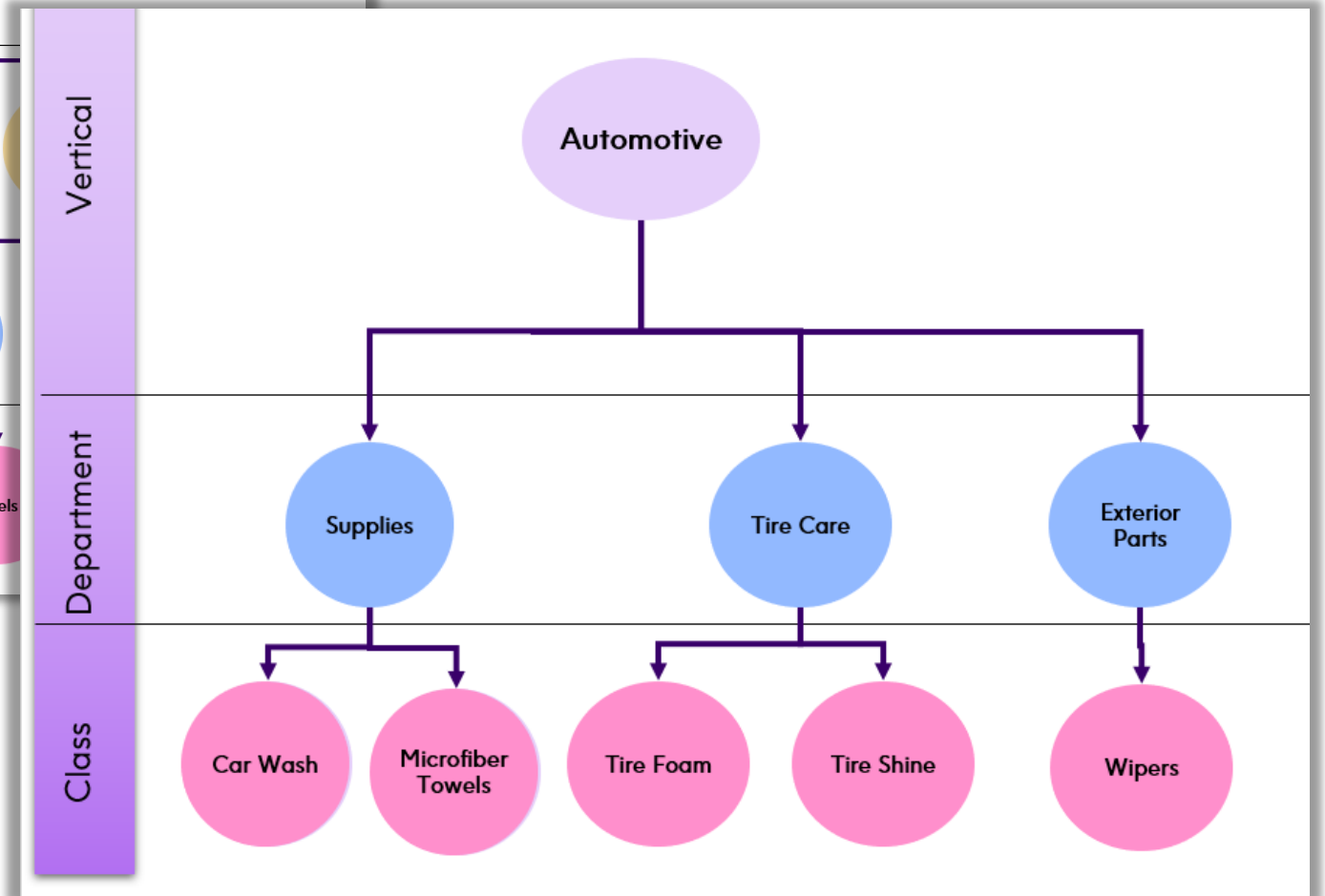
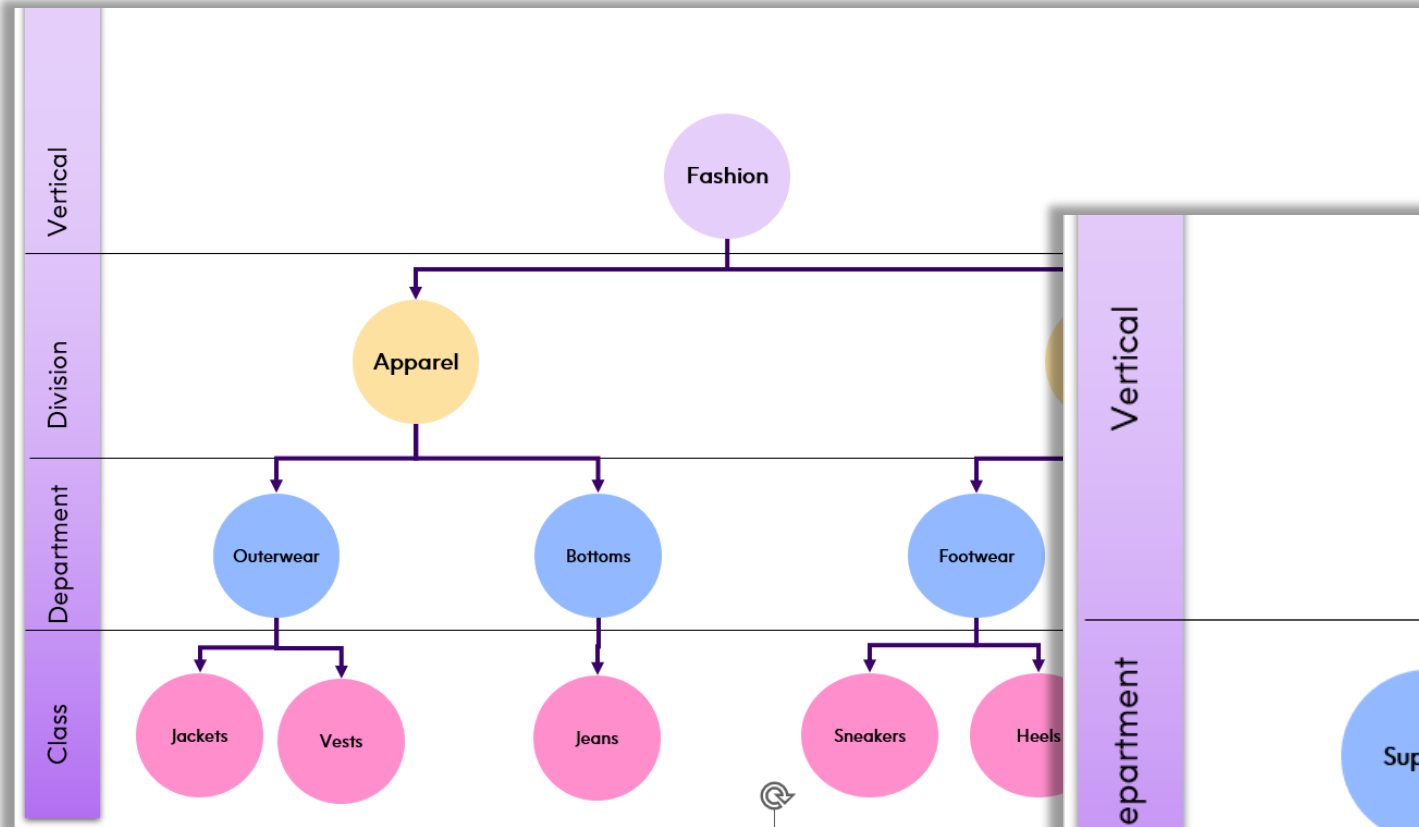
Division

Department

Class



Hybrid Customer Metamodel



Q&A



Thank You

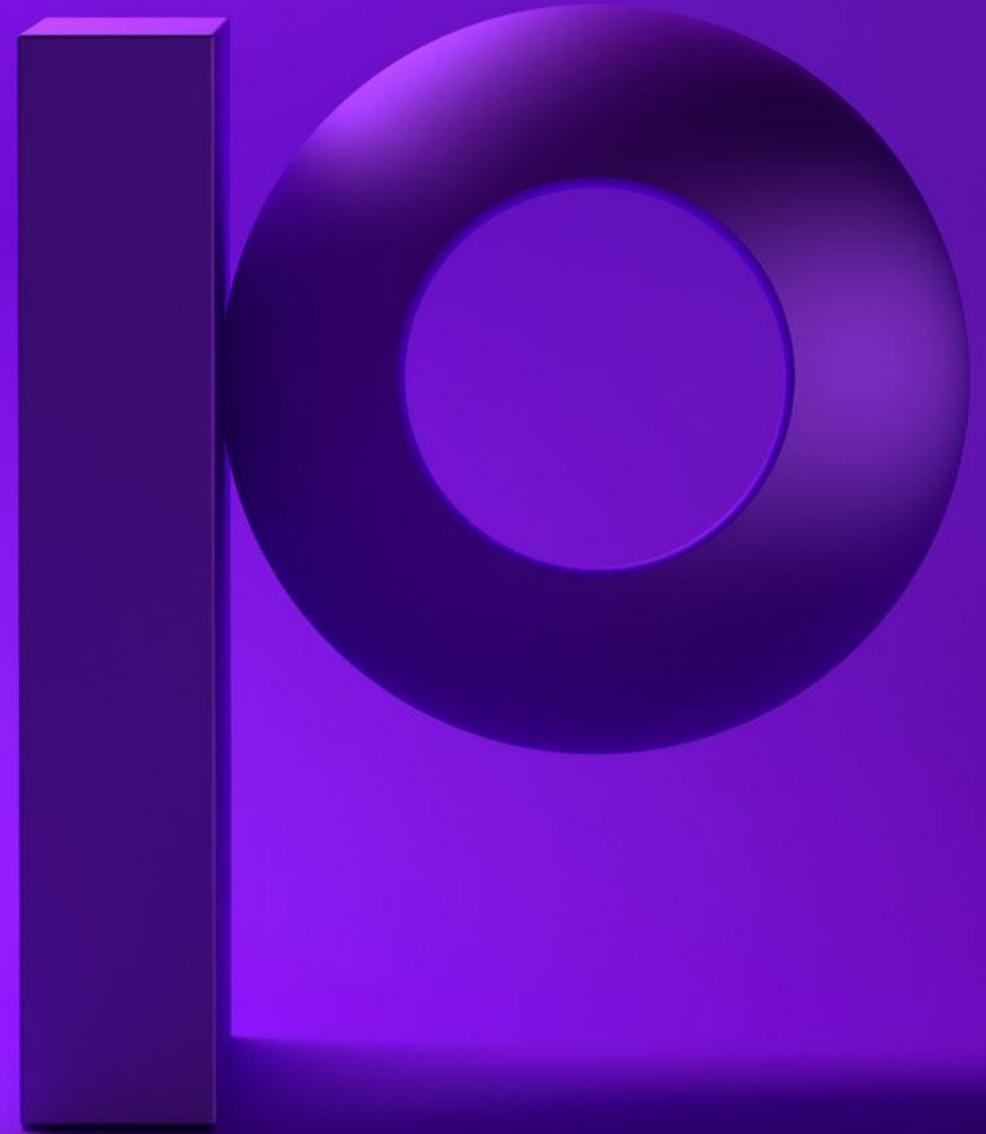


Announcements, Questions & Closing Remarks

March 27, 2025

Julie Skeen | Senior Product Marketing Manager, Precisely

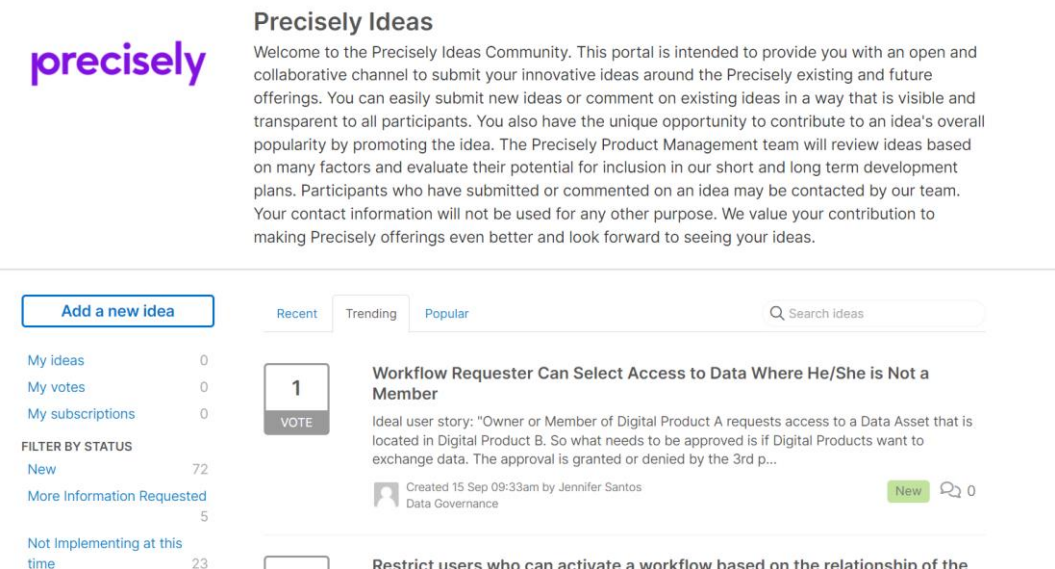
Matt Malczewski | Customer Program Manager, Precisely



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 shows 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

[Precisely.com/Resource-center](https://www.precisely.com/Resource-center)

Precisely Sponsored Webinars & Events

- TDWI: Unlocking the Power of Trusted Data for AI, Analytics, and Business Growth (April)
- Dataversity Demo Days: AI Governance is no different – Or is it? (June 18)
- Dataversity: AI You can Trust: The Critical Role of Governance and Quality (May 1)

Next Data Governance User Group: May 22, 2025

PRECISELY IN THE NEWS

Suite Momentum Announcement



CIO/CDO Announcement

Precisely Promotes Joel Chapman to CIO and Dave Shuman to CDO



See you in London!



Gartner Data & Analytics Summit 2025

12 – 14 May 2025 | London, U.K.

This year's conference delivers actionable insights into how data, analytics and AI leaders can shape the future of data-driven strategies. Addressing topics such as AI advancements, governance, data architectures, leadership and more, this event will enable you to strike a balance between innovation and operational excellence to secure future value.

Data360 Govern Knowledge Community

Data360 Govern

[Share](#) [Settings](#)

[Community Home](#) [Discussion 1.1K](#) [Library 4](#) [Events 0](#) [Members 146](#)

Welcome to the Data360 Govern 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](#)

[Product Documentation](#)

Latest Discussion Posts [Add](#)



[February 20th Data Governance User Group Meeting Agenda ...](#)

By: [Matt Malczewski](#) , 11 days ago

Hello Everyone; In case you missed or did not receive our recent email, the agenda and registration link for our 10:00am EST Data Governance User Group meeting can be found here . This meeting promises to be a solid kick-off to our 2025 user group ...

1 person likes this.



[RE: Mass change/edit asset name](#)

By: [Peter Carroll](#) , one month ago

John, you have saved me hours or manual work! Thank you so much!! I have used the API in the past for deleting large numbers of assets but never for something like this. Thank you for taking the time to share such detailed instructions. I did get an ...



[RE: Mass change/edit asset name](#)

By: [Peter Carroll](#) , one month ago

EDIT: Post was duplication of previous reply and can't be deleted.

Data360 Govern Product Announcements



Data360 Govern Product Announcements

< Share

Join Community

Community Home

Discussion 114

Library 12

Members 154

Welcome to the Data360 Govern community! Please [subscribe for notifications](#).

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

Product Discussion

Product Documentation

Latest Discussion Posts

Add



Data360® Govern Patch to Dev, UAT and Production on ...

By: Product Communications , 2 days ago

February 14, 2025 A patch was applied to the D360 Govern Dev, UAT, and Production environments on Friday, February 14, 2025. What's New? The following issues were addressed in this patch: ...



Data360® Govern Patch to Dev, UAT and Production on ...

By: Product Communications , 4 days ago

February 13, 2025 A patch was applied to the D360 Govern Dev, UAT, and Production environments on Thursday, February 13, 2025. What's New? The following issues were addressed in this patch: ...



Data360® Govern Update to Dev, UAT, and Production ...

By: Product Communications , 6 days ago

February 11, 2025 An update was applied to the D360 Govern Dev, UAT, and Production environments on Tuesday, February 11, 2025. What's New? The following issues were addressed in this Update: Fixed an issue ...

1 person likes this.

Data Governance Asset Archive

precisely

Data Governance User Group (DGUG)

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 data governance professional willing to share your experiences or a new user who'd like to grow your knowledge, this user group is an excellent way to help you get the most value from your technology investment.

Through presentations, demonstrations and more, Precisely user groups provide an excellent way to expand your knowledge and grow your professional network. You will:

- Receive an immediate return on your time investment: you can apply the techniques and skills you learn as soon as you return to work.
- Be inspired to address common business challenges from Precisely customers who are happy to share their learnings.
- Network with fellow Precisely solution experts and have access to support resources.
- Learn about the latest solution roadmaps and updates.

Below, you will find an archive of past Data Governance User Group (DGUG) and Data Governance Modernization Session recordings.



Data Governance Asset Archive

Data Governance User Group (DGUG)

November 2024 - Full Meeting Recording

This meeting focused on how Precisely and Artificial Intelligence are a powerful combination for effective data governance.

precisely

Data Governance User Group November 21, 2024

Marco de Jong at IntoDQ2- 'Becoming Data Driven & Enhancing Metadata Quality'

Mike Ortmann at Precisely- 'Data Governance for AI'

[Watch here](#)

September 2024 – Full Meeting Recording

This meeting featured a dive into the Gartner Magic Quadrant and the evolution of DG use cases and using APIs in workflows for integration with applications.

precisely

Data Governance User Group September 19, 2024

Sue Pawlak at Precisely- 'Gartner Data & Analytics Governance Magic Quadrant: The Evolution of Data Governance Use Cases'

Chris Reed at Precisely- 'Using APIs In Workflow To Integrate With Other Applications'

Ken Beutler at Precisely- 'Overview of Data Governance Modernization Session'

[Watch here](#)

May 2024 – Full Meeting Recording

This meeting featured a customer presentation from Schaeffle on the topic of partnering with Precisely.

precisely

Data Governance User Group May 16, 2024

Thomas Batari at Schaeffle- 'Striving for the Next Level Together- Schaeffler & Precisely'

Ken Beutler at Precisely- 'Data Governance Roadmap Update'

[Watch here](#)

Data Governance Asset Archive

Modernization Sessions - Full Meeting Recordings

October 2024 – Full Meeting Recording

This meeting features the latest timeline and development updates for Data Governance.

precisely

Data Governance User Group: Modernization Session October 24, 2024

Ken Beutler at Precisely- 'Roadmap Session'

[Watch here](#)

July 2024 – Full Meeting Recording

The inaugural launch of the Modernization Sessions, featuring an update on timelines and developments for modernizing Data Governance architecture and capabilities. applications.

precisely

Data Governance User Group July 25, 2024

Ken Beutler at Precisely- 'Special Roadmap Session'

[Watch here](#)

Data Governance Asset Archive

Modernization Sessions - Full Meeting Recordings

October 2024 – Full Meeting Recording

This meeting features the latest development updates for Data Governance Modernization.

precisely

Data Governance Modernization
October 24, 2024

Ken Beutler at Precisely - Roadmap

[Watch here](#)

Data Governance Presentation Slides

[November 2024 DGUG](#)

[October 2024 DG Modernization Session](#)

[September 2024 DGUG](#)

[July 2024 DG Modernization Session](#)

[May 2024 DGUG](#)

[March 2024 DGUG](#)

Recording

ation Sessions, developments for lecture and

er Group

[Watch here](#)

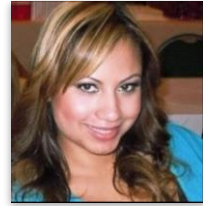
Data Governance Customer Success Team



Brenda
Stoetzer



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



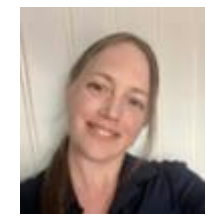
Afsane
Anand



Sherri
Chambers



Prescilla
Baldoz



Alex
McKenzie



precisely

Customer Success



Cali
David



Ghali
Mazzouri



Elle
Fuller



Thank You

precisely