



Best Practices Metadata

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THE VALUE PROPOSITION OF A METADATA DRIVEN DATA GOVERNANCE PROGRAM

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Agenda

- **Introduction**
- **Business need**
- **Informatica as the solution**
- **Share experiences**
- **Architecture**
- **What to watch out for**
- **Conclusion**

Introduction

- **Fidelity Senior Business and Technology management recognizes that data is a business asset and a competitive differentiator.**
- **Data Governance**
 - Data quality
 - Data consistency
 - Data definitions
 - End-to-end lineage
- **Metadata Management is a key tool within the Data Governance framework.**

Describe Metadata

- **Metadata provides contextual information**
 - business description
 - owners, stewards, and custodians
 - technical attributes
 - location and lineage
 - transformations and calculations
- **A managed metadata environment ensures that everyone who works with data can efficiently find it, learn what it means, where it came from, and how it is used.**

Business Need

- **Data is critical to the business**
- **Associates across business units share obstacles:**
 - No authoritative source
 - Concealed rules
 - Ambiguous or inconsistent terminology
 - Difficulty estimating projects accurately
 - Inefficient processes

Business Challenge

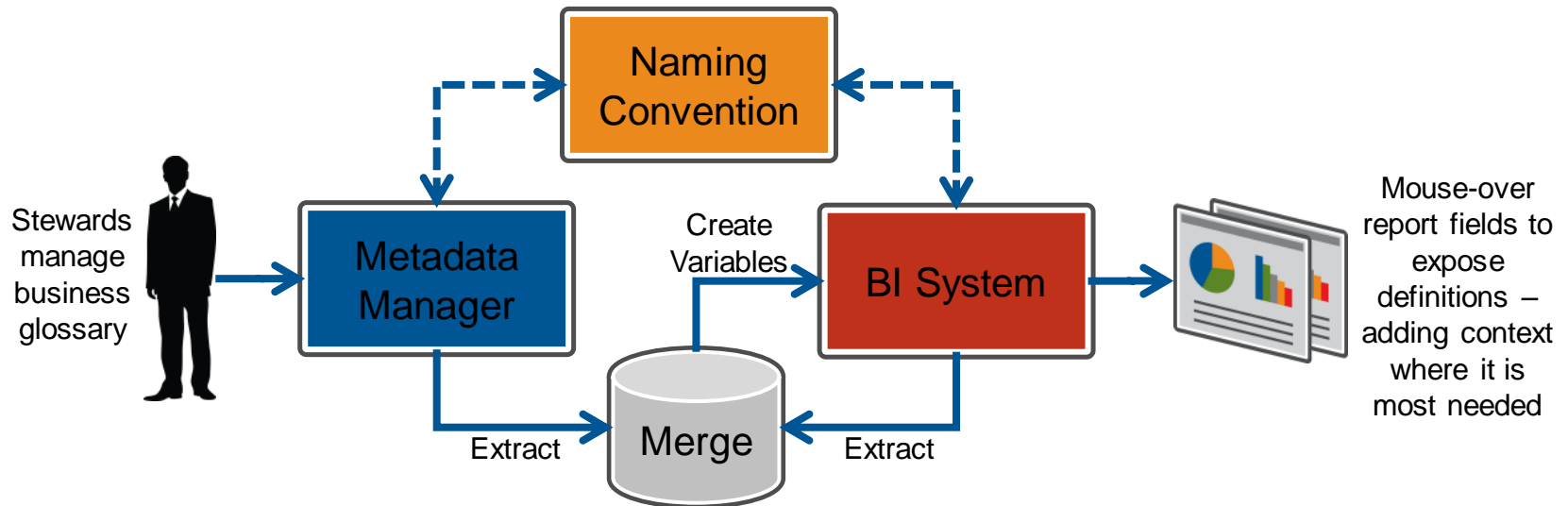
- **Business users:**
 - Lack confidence in data
 - Manage disparate metadata
 - Must comply with regulations
- **Technical users spend time:**
 - Tracing lineage
 - Researching impact of changes
 - Testing excessively

Informatica Metadata Manager as the solution

- **Metadata Manager application contains features that are important to the PWI metadata solution:**
 - Business glossary
 - Audit trail
 - Robust Security Model
 - Third-party adaptors with pre-built metamodels
 - Extensible metamodels
 - Custom metamodel and scanner capability
 - Graphical lineage diagrams
 - URL API
 - Tight integration with PowerCenter
 - Ability to schedule scans from UI

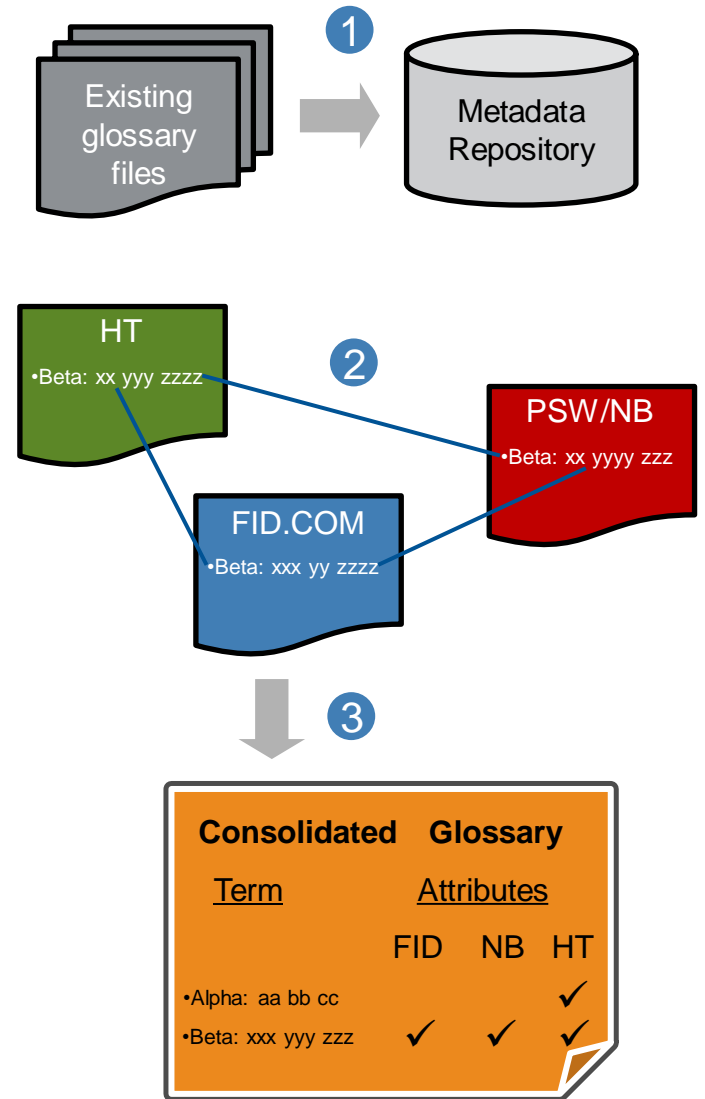
Understand Data

- Requirement: manage data definitions for BI system
- Solution: Metadata Manager to model, manage, and extract definitions



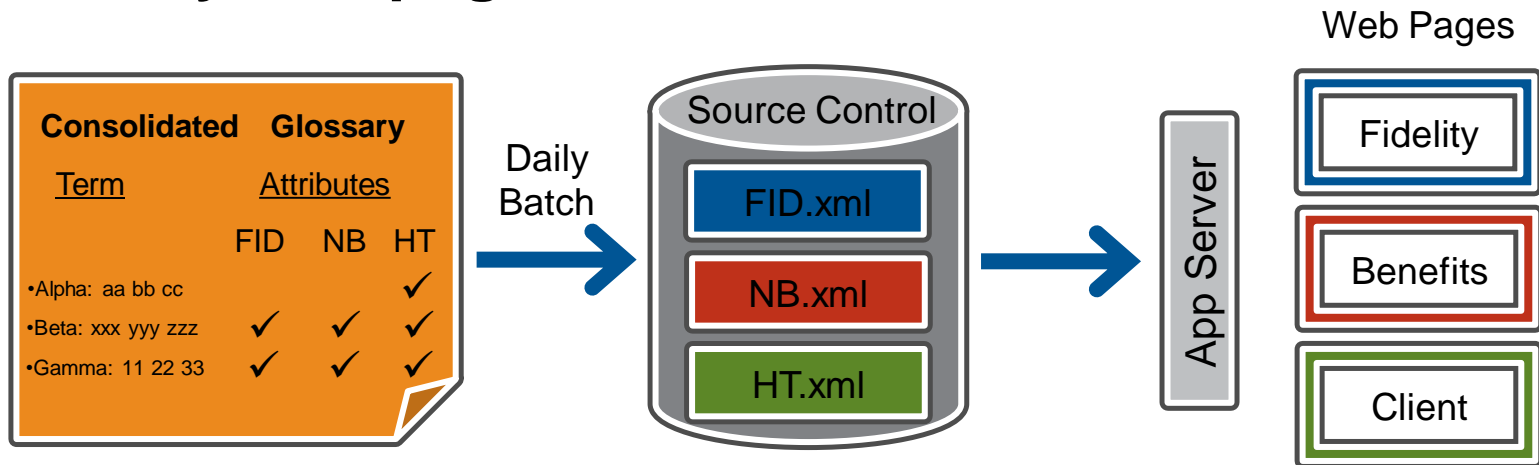
Standardize Metadata Procedures

- One business unit responsible for definitions invoked on three distinct web sites.
- Definitions should be consistent
- Consolidate to a single business glossary:
 1. Single, common glossary model
 2. Interim step is to link entries
 3. Consolidate terms and definitions



Share Metadata Across the Enterprise

- Automation to keep metadata current
- Extending the glossary model
- Common terms are defined only one time and definitions are displayed consistently across Fidelity web pages.

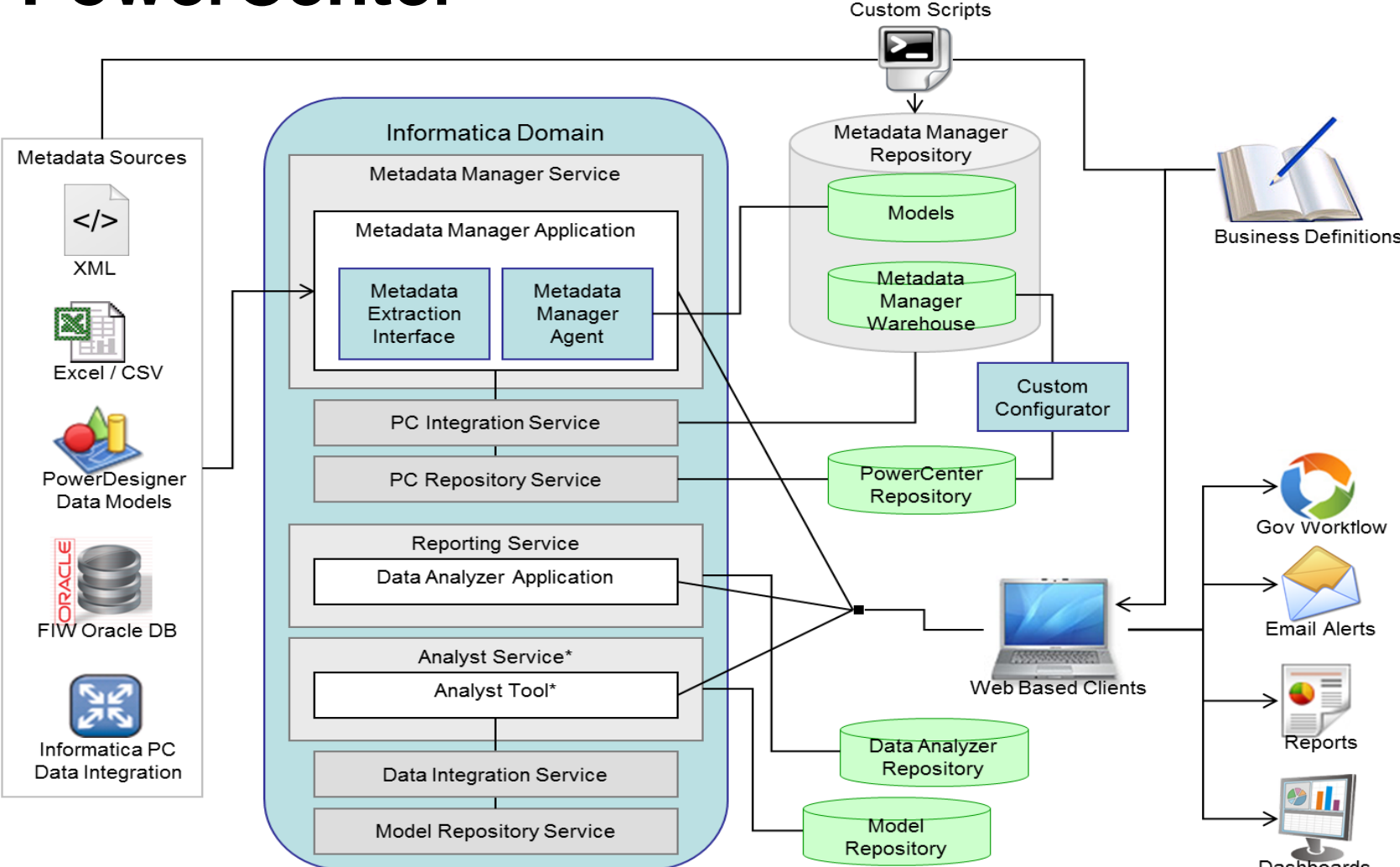


Impact Analysis

User	Traditional Analysis	Using Metadata Manager	Savings
Systems Analyst	20 hours	30 minutes	97.5%
Business Analyst	32 hours	1 hour	96.9%
QA	26 hours	1 hour	96.2%

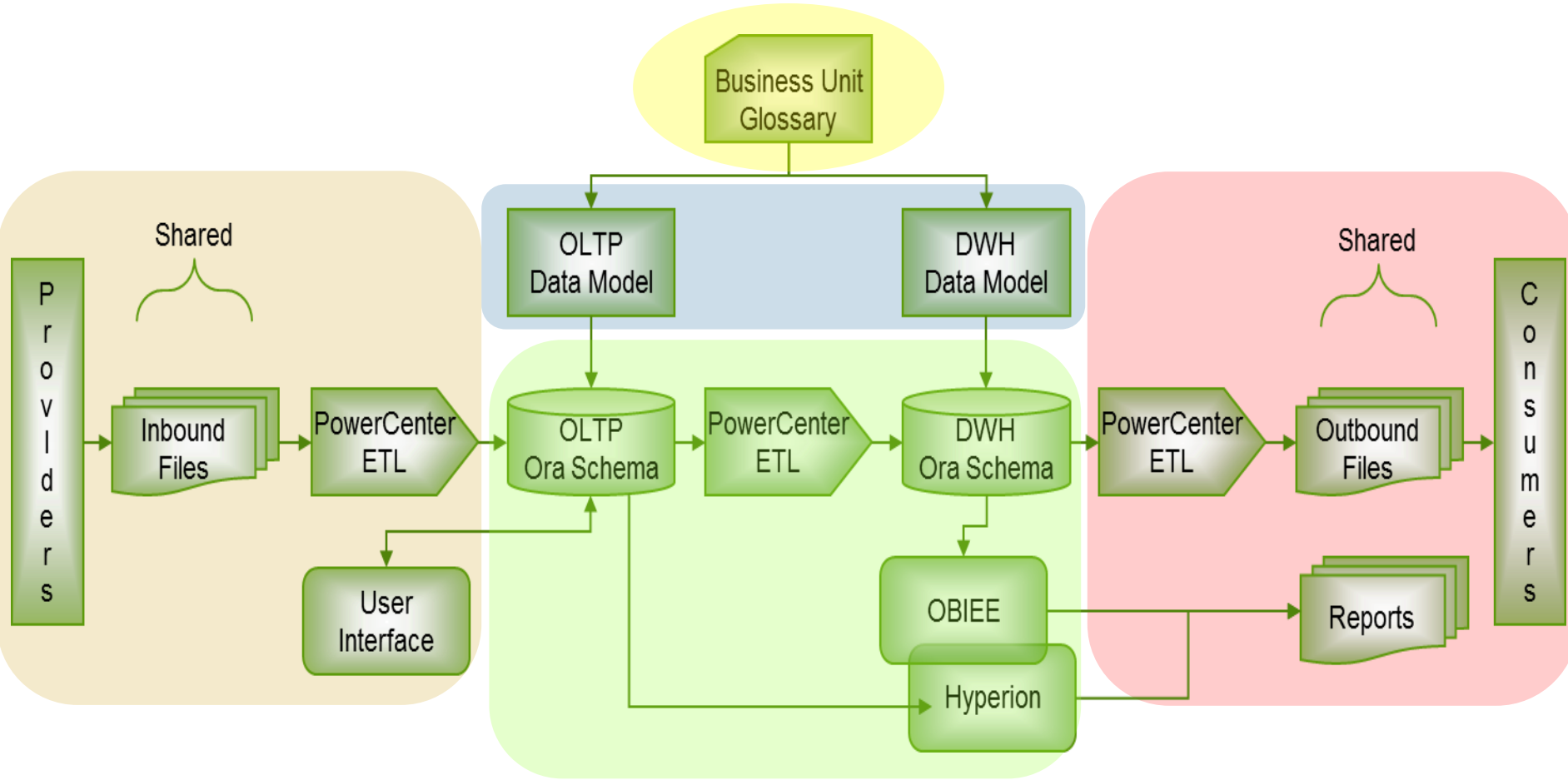
- **Assessing scope for a change to the business logic for a single data field in an administration system, projected the analysis effort to be 20 hours.**
- **Using the metadata system, impact analysis was conducted.**
- **Spreadsheet and a graphic image of the impact were downloaded just short of 30 minutes.**
- **Three examples from this business unit are charted.**

Architecture – Metadata is a Part of PowerCenter



**Not required for initial implementation: supports profiling, graphic reports, dashboards*

Architecture – Conceptual Metadata Flow



What to Watch Out For

Risk	Mitigation
Metadata gets stale	<ul style="list-style-type: none">✓ Metadata part of SDLC✓ High degree of automation✓ Some manual maintenance unavoidable
Lack of support from Business	<ul style="list-style-type: none">✓ Use-cases analysis – regarding time, effort, and accuracy.✓ Central administration
Low adoption of metadata program	<ul style="list-style-type: none">✓ Support is necessary at executive level✓ Business led Data Governance
Metadata management is a secondary initiative	<ul style="list-style-type: none">✓ Standardized metadata as a best practice

Best Practices Followed

- **Metadata program aligned with key data strategies.**
- **Reduce cost of extraneous documentation with concise, searchable, and reusable artifacts.**
- **Make metadata maintenance a part of business process and SDLC.**
- **Ensure sponsor commitment to ongoing program before metadata initiative begins**
- **Keep information up-to-date through automation.**
- **Don't boil the ocean - prove value with local successes. Deliver iterations beginning with basic, foundational capabilities.**

Business and Technical Benefits

- **Improved efficiency and accuracy of analysis**
- **Enterprise-wide understanding and proper usage of business terms**
- **One-stop shop for end-users to find data definitions and perform impact analysis**
- **KPIs affected:**
 - Impact analysis in minutes instead of days
 - End-user self service
 - Measure quality and completeness of metadata
- **Financial benefits:**
 - Confident scope estimation of proposed changes
 - Targeted testing reduces effort
 - Reduce effort for training and knowledge transfer

Questions?

