

# EDM Webinar

## *BusinessFirst* Data Lineage – A New Approach

A conversation with



Masood Khatri  
VP, Product Owner  
Xoriant CDi



Apnav Agrawal  
Director, Data Management  
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)
- EDM Council Finance Board Chair (2007-2015)
- 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

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# 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

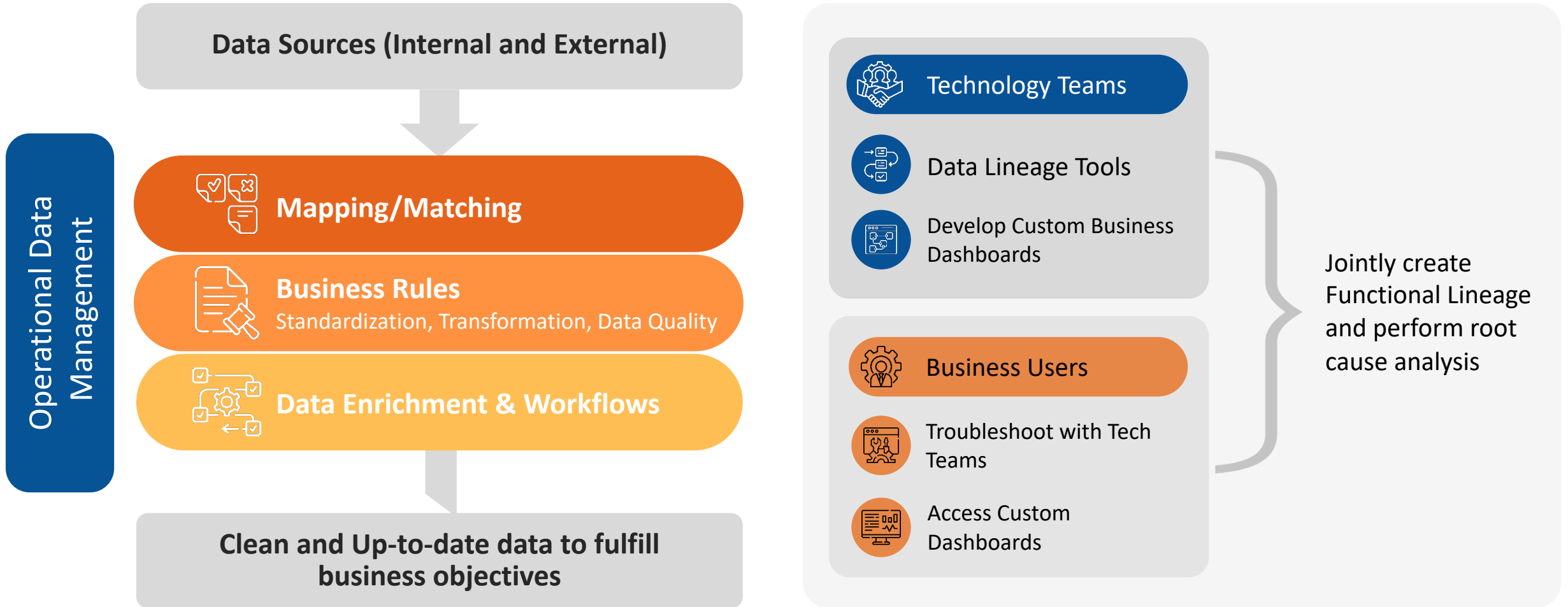
Director, Data Management and Governance



- 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.



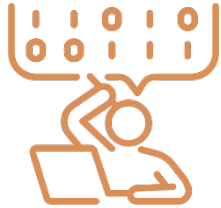
# Current process for Functional Data Lineage



# Key Challenges with Data Lineage for Business Users



**Lack of  
Transparency**



**Manual Effort**



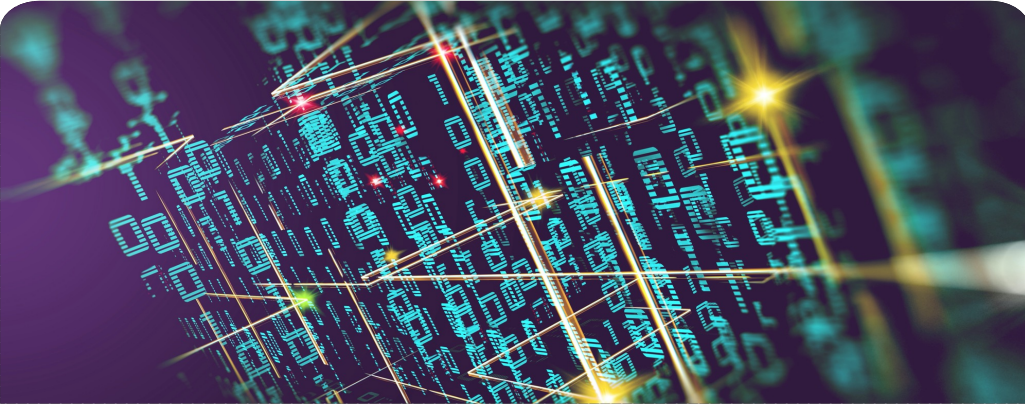
**Tools too Technical**



**Delays in Accessing  
Information**

# POLL 1

# 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

## Data Journey



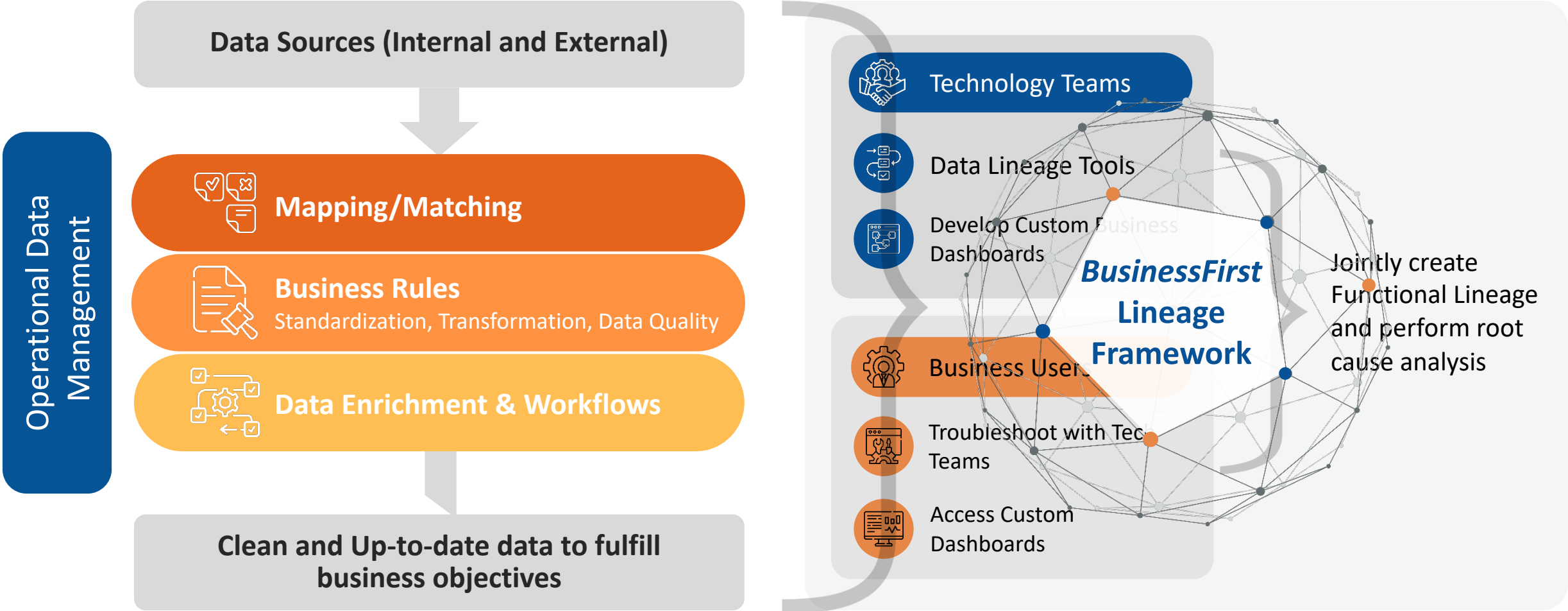
## Full traceability of changes during data journey

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

## Audit Trail

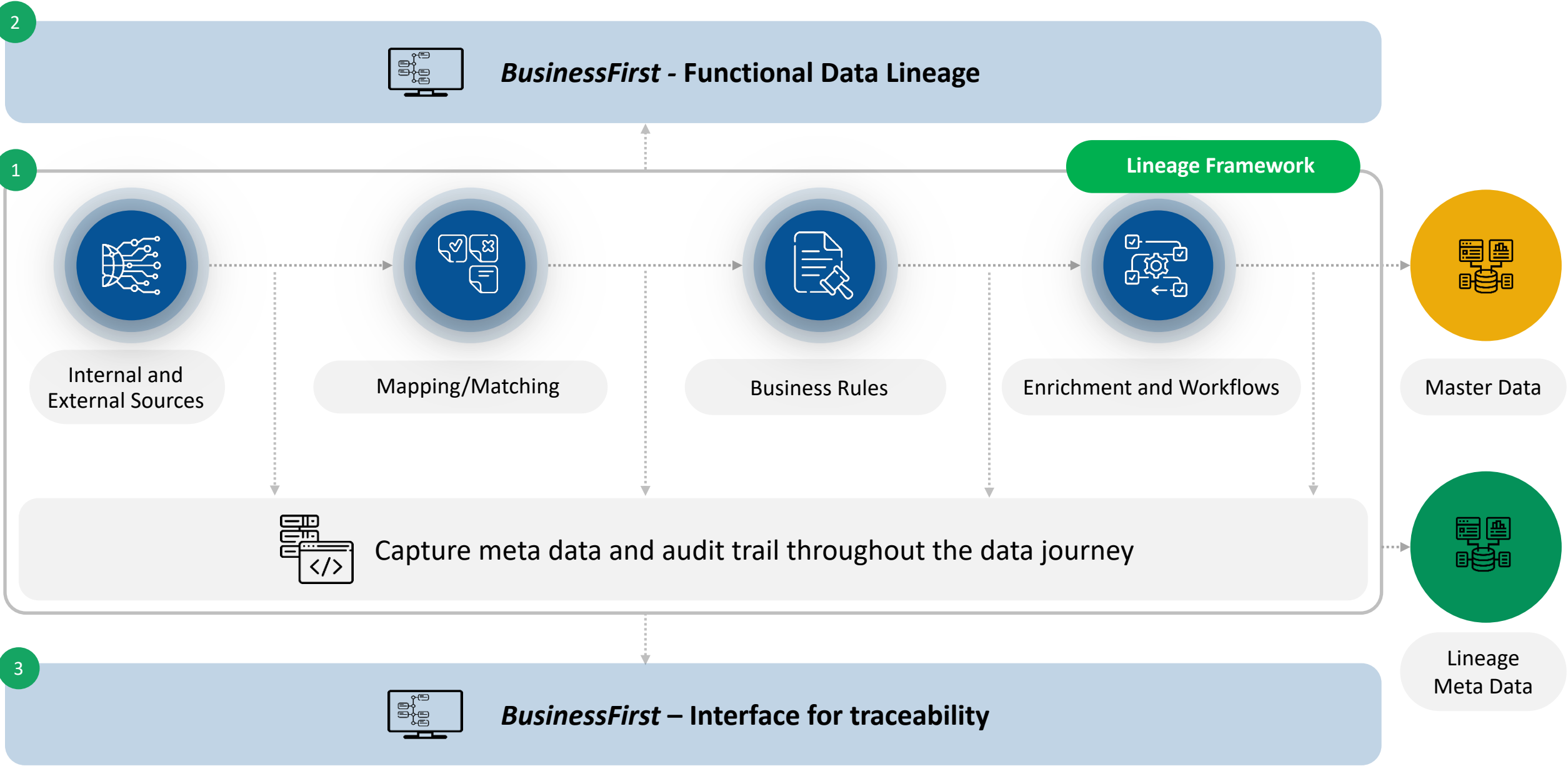


# A BusinessFirst Approach towards Data Lineage

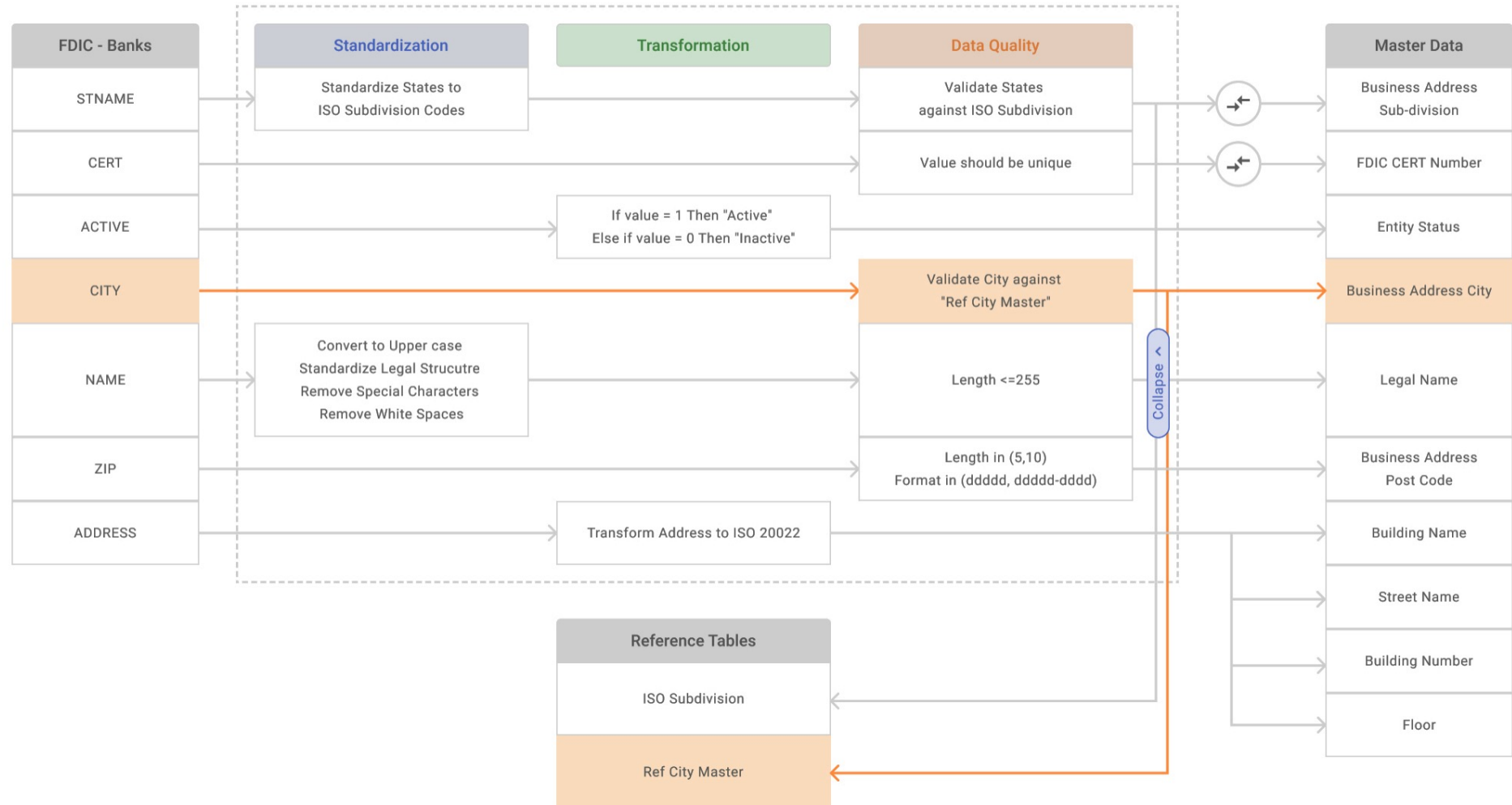


# POLL 2

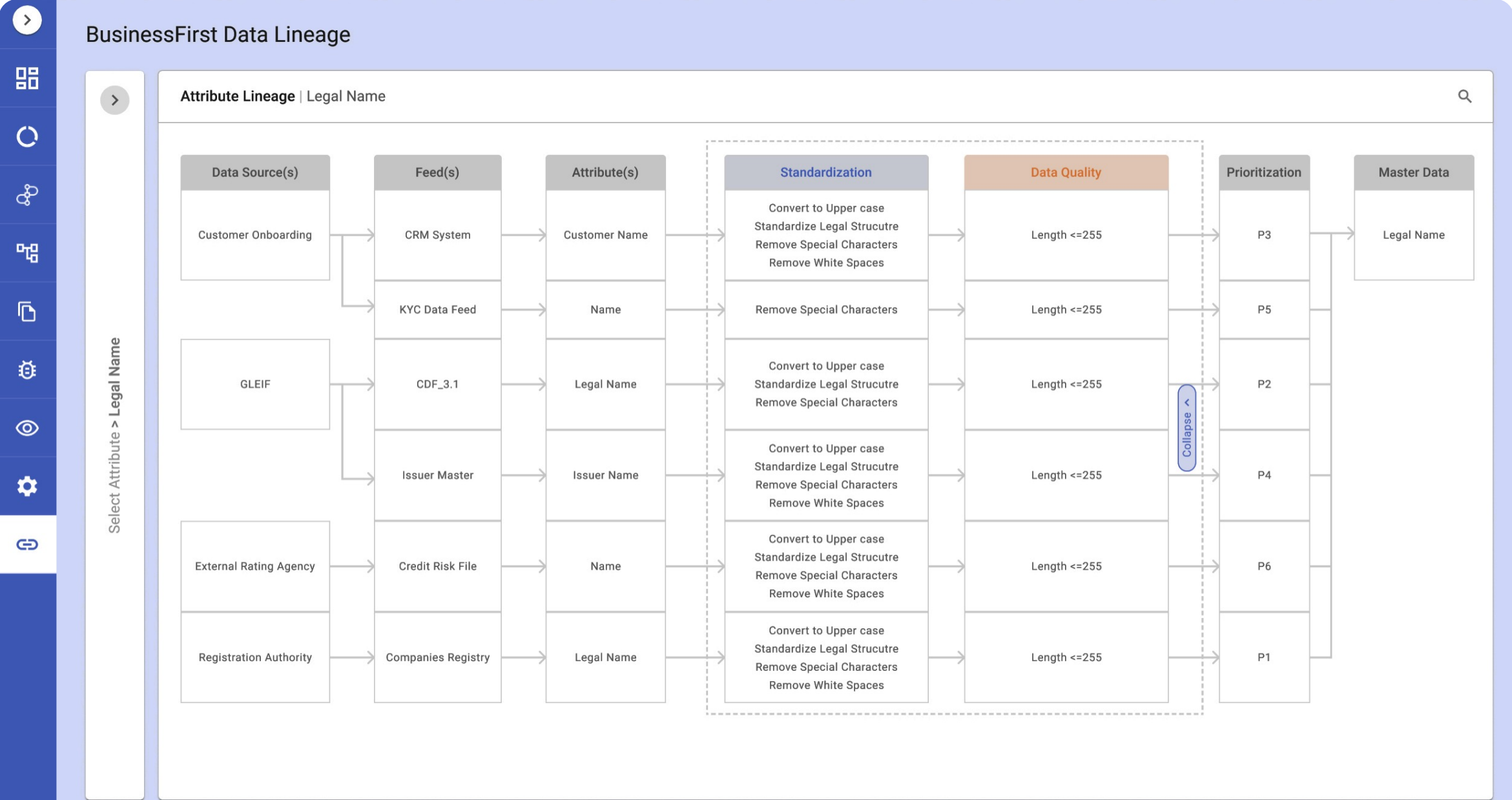
# BusinessFirst Data Lineage Framework



## ***BusinessFirst* – Feed level data lineage**



# BusinessFirst – Attribute level data lineage





# BusinessFirst – Transactional Lineage

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Entity Maintenance > Search Entities > Xoriant Corp

< BusinessFirst Data Lineage

Feed

Mapping

Rules

Matching

Workflow

Master Data

Legal Name (Ebusinessware, Inc. -> Xoriant Corp)

Master Data

Step 6/6

Old Value	New Value	Created by	Created date	Updated by	Updated date
Ebusinessware, Inc.	Xoriant Corp	CRM System	10/9/2013	MK43156	10/10/2013

Workflow

Step 5/6

Workflow	Level	Date	Status	User	Comments
Data Maintenance	02	10-15-2013	Approved	AA14589	-
	02	10-14-2013	Pending for Approval	AA14589	-
	01	10-13-2013	Submitted	MK43156	Ebusinessware, Inc. has been merged with and into Idea Solutions, Inc. that was merged with and into Xoriant Corp with Xoriant Corp as the Surviving entity
		10-10-2013	Pending	MK43156	-
		10-9-2013	Assigned	MK43156	-

Matching

Step 4/6

Matching Specification 02	Source Attribute	Gold Attribute	Matching Type	Matching Result
	Former Name (Ebusinessware, Inc.)	Legal Name (Ebusinessware, Inc.)	Fuzzy	100%
	Domicile Country	Domicile Country	Exact	100%

# Benefits



**Business Friendly**



**Reduced  
Dependency on  
Technology Team**



**Increased  
Transparency**



**Increased  
Productivity/Speed**

# Questions?



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**FOR MORE INFORMATION:**



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