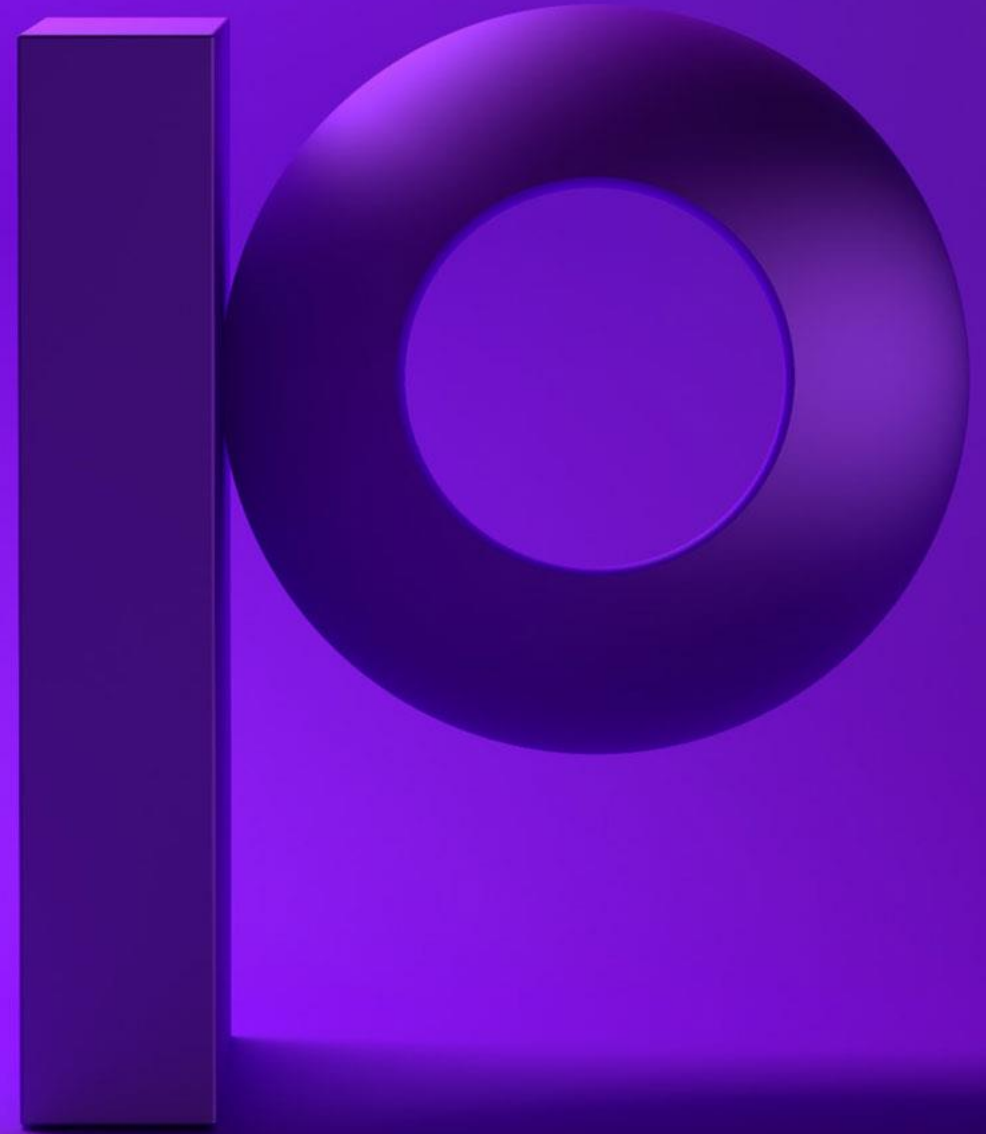


Data 360 Govern User Group

January 19, 2023



Agenda

1

Data Governance
Ideas Portal

2

Data Integrity
Suite Update

3

Survey Results
and Q & A

Wrap-Up

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

Antonio Cotroneo



**Sr. Product Marketing Mgr,
Data Integrity Suite**

Antonio Cotroneo is the Senior Product Marketing Manager for the Data Integrity Suite. He has spent his career helping people worldwide maximize their data, technology, and analyses to make critical decisions for their customers and community. He currently lives in Charlotte, NC with his wife and two children.

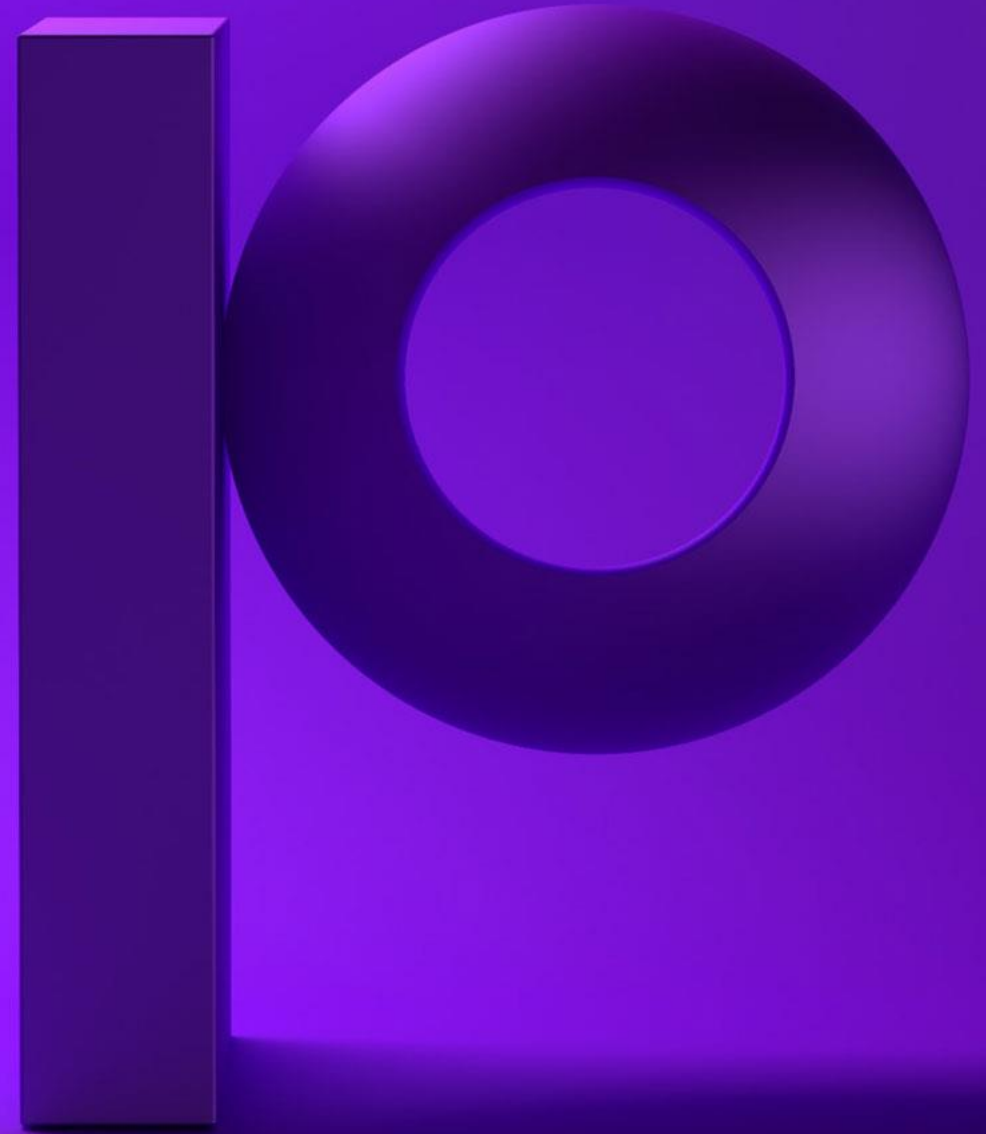
**Guest
Speakers**

precisely

Data Governance Ideas Portal

Ken Beutler

January 19, 2023



Precisely Ideas Portal

- <https://ideas.precisely.com/?project=DGOV>
- An open (public) community to submit your enhancement requests to the product team
- Used both internally and externally to consolidate enhancement requests and understand the trending and popular ideas

The screenshot displays the Precisely Ideas Portal interface. At the top, there's a navigation bar with various tabs like 'Data Catalog', '2022.Q4 Mar', 'Features for', 'Ideas for Dat', 'Data Govern', '[GOV-1640]', 'Choose the', 'Data_Integr', and 'Data Govern'. Below this is a search bar and a list of managed bookmarks including 'Accounts', 'Cooking', 'School', 'Activities', 'Reading', 'PM', 'Demo', 'Roadmaps', 'Govern', 'Catalog', 'UX', 'Jira', 'Aha', and 'Tableau'.

The main content area is titled 'Precisely Ideas' and includes 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, there's a section for 'Add a new idea' and a list of ideas. The list includes filters for status (New, More Information Requested, Not Implementing at this time, Future Consideration, Likely to Implement, On the Roadmap, In development, Now Available) and category (ACR, Address Fabrics, Analyze, Assure DQ, Automate). The ideas listed are:

- Make Local Search Filters consistent with the Asset Type Definition Categories**
This is enhancement request on behalf of Future Fund. The client would like the local search filter to reflect Categories as defined against the asset type. For example, the client has a [Report] asset type has the categories Report Details ...
Created 18 Jan 06:35am by Yann Chane-Kive
Data Governance
- Set a field required based on a condition.**
At the moment we can specify a field as "Is Required" The request is to set a field "Is Required" based on a value value from a Reference List or Simple Text. Same way as how now a workflow can be set to a condition.
Created 13 Jan 01:20pm by Marco de Jong
Data Governance
- Global Search - Usage Statistics**
Raising this on behalf of Futurefund: As a DGO/ Admin user, I want usage stats on global searches in Govern through a monthly/weekly report or dashboard so that I can evaluate which terms may need to be introduced/ updated in the Business Glossary...
Created 30 Dec 09:54am by Dipin Cyriac
Data Governance

Submitting an Idea

- Describe the issue
- Help us understand the problem
- Detail the proposed enhancement

2

AD Group Membership Synchronization

Currently if groups are established in Govern as synchronized with AD, the sync occurs on user by user basis as they log into Govern and the Groups they belong to are supplied as part of the claim information.

This leads to an issue of incorrect ownership details being supplied in Govern if a user assignments within Groups changes but they haven't accessed Govern for a period of time, hence no sync of their Group assignments

Functionality should be added to enable scheduled (i.e. daily) synchronization of group memberships in Govern with the AD Group.

Stephen Linsley • Dec 19 2022 • New

Data Governance

Comments (0)

Votes (2)

Paragraph ▼ | B | I | U | | | | A ▼ | ▼ | ▼ | ▼ | | + ▼ |

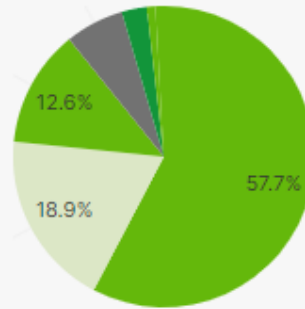
Attach files

Post comment

Ideas overview

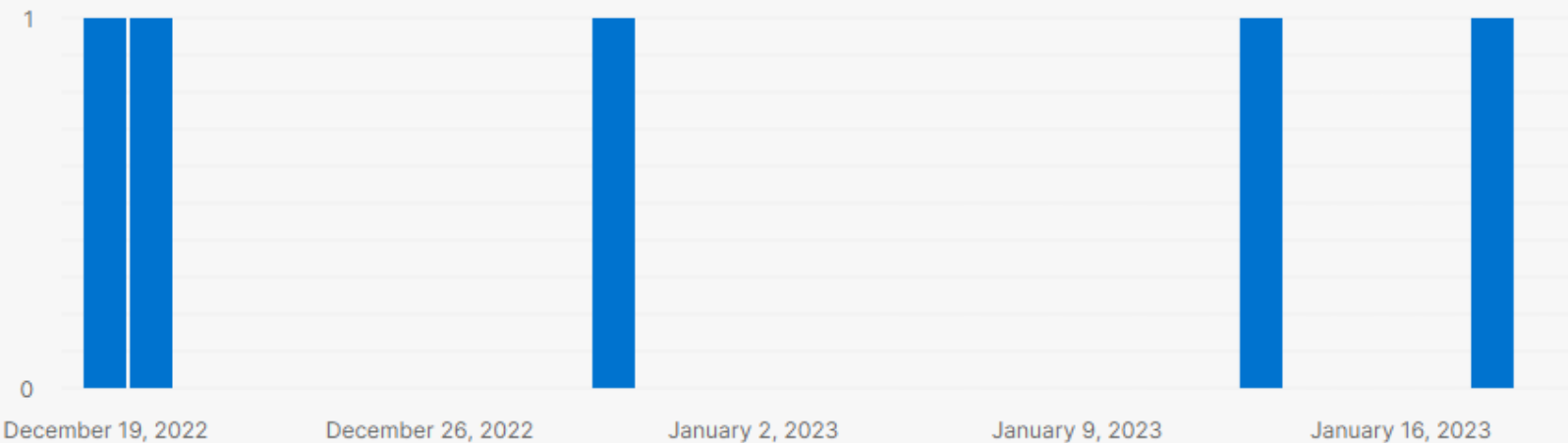
[Add idea](#)

Status



- 64 New
- 14 Future Consideration
- 3 Now Available
- 1 Likely to Implement
- 21 On the Roadmap
- 7 Not Implementing at this time
- 1 More Information Requested
- 0 In development

Ideas



111 ideas

1 ideas portals

On the Roadmap

precisely Data Governance Info Strategy Releases Ideas Features Roadmaps

List report [Create new report](#)

List [Settings] [Filter] [Idea merged status: Show non-me...] [Idea status: On the Roadmap] [Workspace name: Data Governan...]

<input type="checkbox"/>	Idea reference	Idea name	Workspace name	Idea status
<input type="checkbox"/>	DGOV-I-6	Provide more control of workflow form label text formatting via an HTML field	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-7	Apply Take Action / Workflow availability based on context	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-8	Navigation after editing an asset	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-9	Allow sorting relation lookup results on an asset in descending order using a numeric field on the relationship	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-12	Include Responsibilities as selection possibility in Relation Lookups	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-13	"Take Action" in Side Panel	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-15	Make Search Settings Initial Scope more granular	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-19	Update API to enable scripted migration of workflows	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-20	Make search filter capabilities consistent across the search type	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-21	Efficient responsibility & authorization management	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-26	Create API to delete 'Actions'	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-30	Include Request Body in Workflow step information	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-32	Aggregate emails coming from a Workflow	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-39	Workflows: enable variation of 'wait for all transitions' so that it waits for all triggered transitions and not all possible transitions	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-40	Issue deleting comments in Govern	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-46	Provide Filter Sets For Efficient Filtering Of Grids	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-51	"Take Action" on Govern homepage	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-56	Accept Action fields as input for Relationship Change activity	Data Governance	On the Roadmap
<input type="checkbox"/>	DGOV-I-86	Child record inherit Parent Responsibilities	Data Governance	On the Roadmap

Most Popular

precisely					Data Governance ▾	Info ⓘ	Strategy 🎯	Releases 📅	Ideas 💡	Features ⚙️	☰
List report		Create new report									
List ▾		⚙️ ▾	🔍 ▾	🔄	Idea status: On the Roadmap, No... ▾		🔄	Workspace name: Data Governan... ▾			
<input type="checkbox"/>	Idea reference	Idea name		Idea status		Idea votes					
<input type="checkbox"/>	💡 DGOV-I-27	Drag & Drop Data360 Business/Technical Assets to/within/from Parent-Child Tree Structures		Not Implementing at this time		9					
<input type="checkbox"/>	💡 DGOV-I-28	Assets with the same name but belonging to different domains		New		9					
<input type="checkbox"/>	💡 DGOV-I-89	Global Search Statistics		New		7					
<input type="checkbox"/>	💡 DGOV-I-21	Efficient responsibility & authorization management		On the Roadmap		6					
<input type="checkbox"/>	💡 DGOV-I-44	Tables in HTML type fields		Not Implementing at this time		6					
<input type="checkbox"/>	💡 DGOV-I-7	Apply Take Action / Workflow availability based on context		On the Roadmap		5					
<input type="checkbox"/>	💡 DGOV-I-8	Navigation after editing an asset		On the Roadmap		5					
<input type="checkbox"/>	💡 DGOV-I-11	allow relationship to be a key		Not Implementing at this time		5					
<input type="checkbox"/>	💡 DGOV-I-19	Update API to enable scripted migration of workflows		On the Roadmap		5					
<input type="checkbox"/>	💡 DGOV-I-108	Display Ownership from Related Assets		New		5					
<input type="checkbox"/>	💡 DGOV-I-2	Sort/Re-Order Favourites Menu		Future Consideration		4					
<input type="checkbox"/>	💡 DGOV-I-26	Create API to delete 'Actions'		On the Roadmap		4					
<input type="checkbox"/>	💡 DGOV-I-29	Enable updating of User details		New		4					
<input type="checkbox"/>	💡 DGOV-I-30	Include Request Body in Workflow step information		On the Roadmap		4					
<input type="checkbox"/>	💡 DGOV-I-31	Include user name of user who created and updated the asset to the Activity Detail screen		Future Consideration		4					
<input type="checkbox"/>	💡 DGOV-I-47	Asset Browser Lineage - Ability to hide objects by asset type		New		4					
<input type="checkbox"/>	💡 DGOV-I-79	Enhance workflow API support to allow passing results from two API calls to a 3rd API call. This		New		4					

Moving Forward

- Building a new community requires traffic to flow in both directions; it can't be a one-way street
- The Ideas Portal will be updated monthly to reflect the current status of your enhancement requests
 - Status (will not implement, future consideration, on the roadmap, likely to implement) updates
 - Comments added if additional information is needed or to further collaborate on the enhancement request
- The power of the vote; how do we provide value to the broader customer base

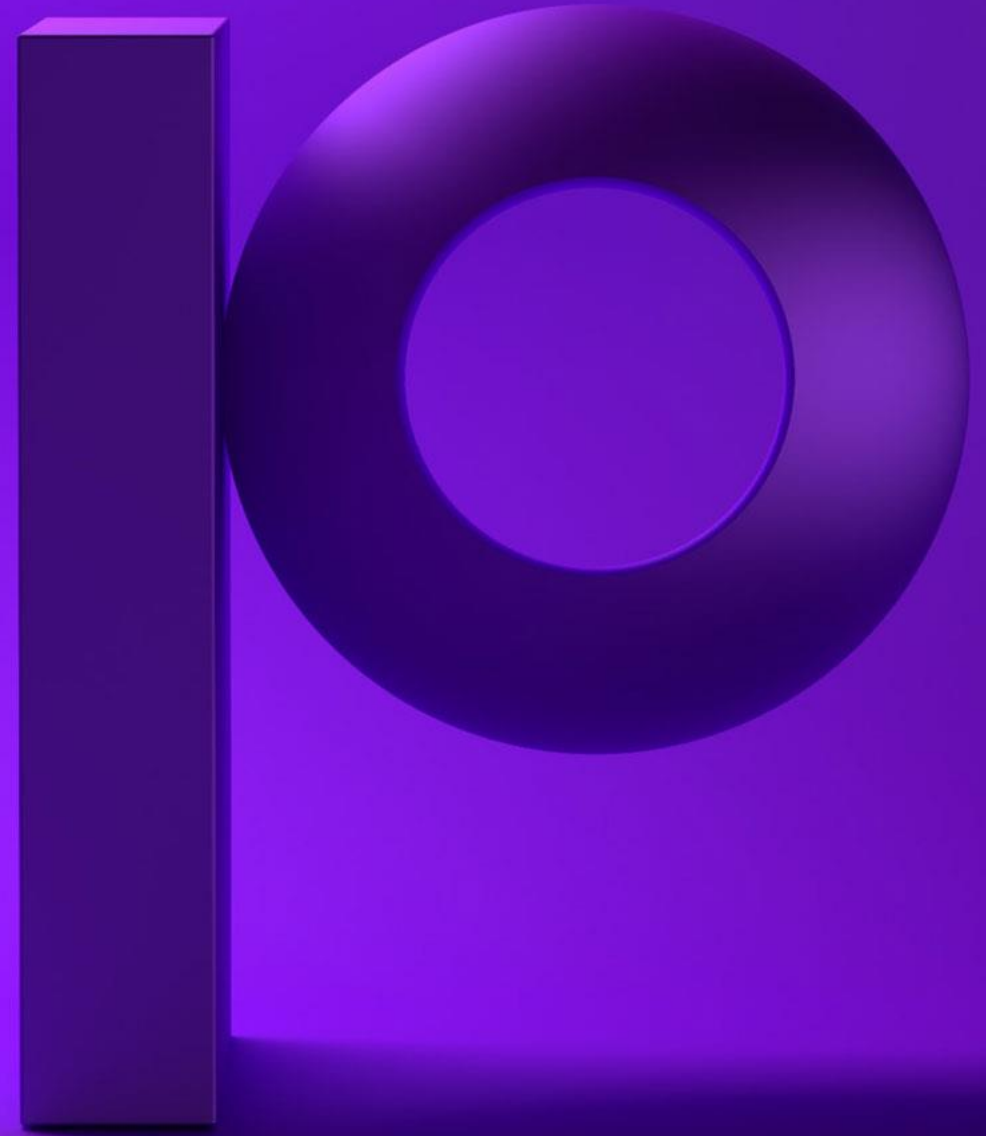
precisely

precisely

Data Integrity Suite

Antonio Cotroneo, Senior Product
Marketing Manager

January 19th, 2023



Business initiatives succeed with trusted data

83%

of CEOs want their organization to be more data-driven

Source: IDC



But data teams don't trust their data

30%

of data practitioners strongly believe their actions are driven by data analysis

27%

of data practitioners completely trust their data

Source: IDC

Can't get it fast enough

Don't understand it

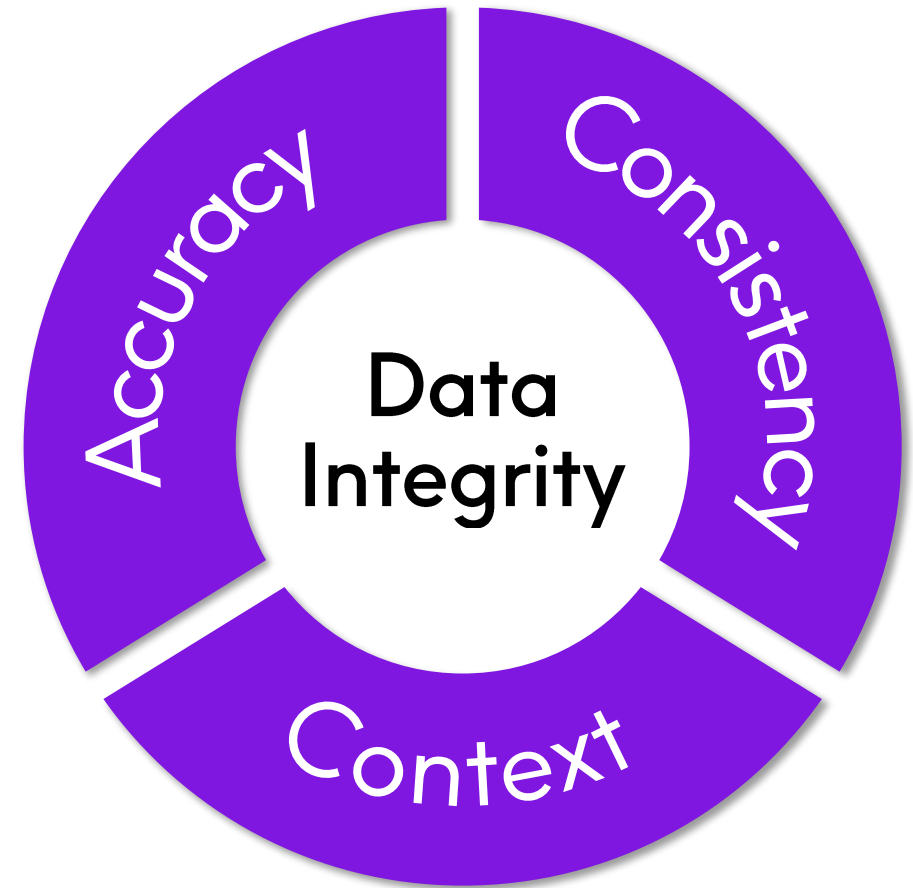
Can't trust it

Don't have the context to use it

Don't know when it's going to break

For trusted data, teams need data integrity

Data integrity is data with maximum accuracy, consistency, and context for confident business decision-making



Precisely leads with a data integrity vision

Teams struggle with traditional solutions.

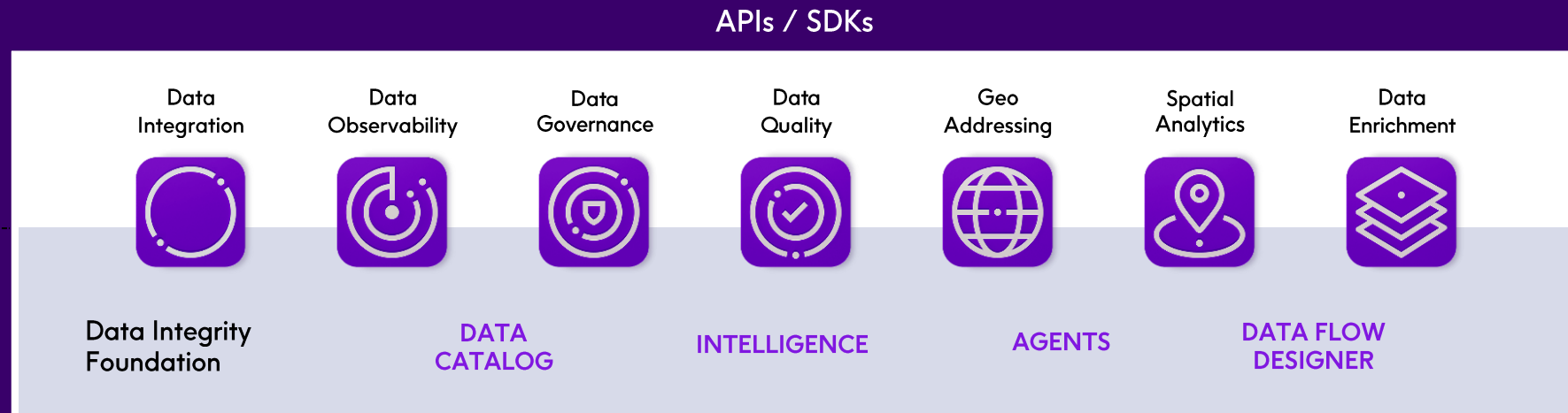
We believe there's a better way.

Data access owned by IT	Collaboration between IT and business data users
Massive, loosely integrated solutions	Just the scalable, interoperable capabilities you need
Data must be brought to the solution	Workflows designed for the cloud that run alongside data
Slow, batch ETL processes	Streaming data pipelines to the cloud
Separate business and IT metadata	Scalable, shared catalog of business & technical metadata
Rules-based data management	AI-driven quality rules, alerts, and data enrichment

Data Integrity Suite

Enterprise Data Sources

- Business Intelligence
- CRM
- Workforce mgmt.
- Data warehouse
- ERP
- Billing



Enterprise Business Systems

- Enterprise apps
- Analytics tools
- Precisely industry apps
- BI dashboards
- AI/ML



Common Entry Points

Find and access

Data
Governance



Data
Integration



- **Search** for goal-related data
- **Request** data access
- **Replicate** requested data into data cloud
- **Catalog** metadata while integrating

Discover and observe

Data
Governance



Data
Observability



- **Profile** data popularity
- **Observe** most critical data for issues
- **Monitor** data usage trends over time

Cleanse and enrich

Data
Governance



Data
Quality



Geo
Addressing



Data
Enrichment



- **Identify** data quality issues
- **Cleanse** data
- **Geocode** to attach PreciselyID
- **Enrich** address data in data quality pipeline
- **Search** for PreciselyID in catalog



Data Integrity Suite Update

Where We've Been

- Suite launch and introduction of module capabilities
 - Data Integration
 - Data Observability
 - Data Governance
 - Geo Addressing
- Trust '22
- Onboarding of first users

Where We Are

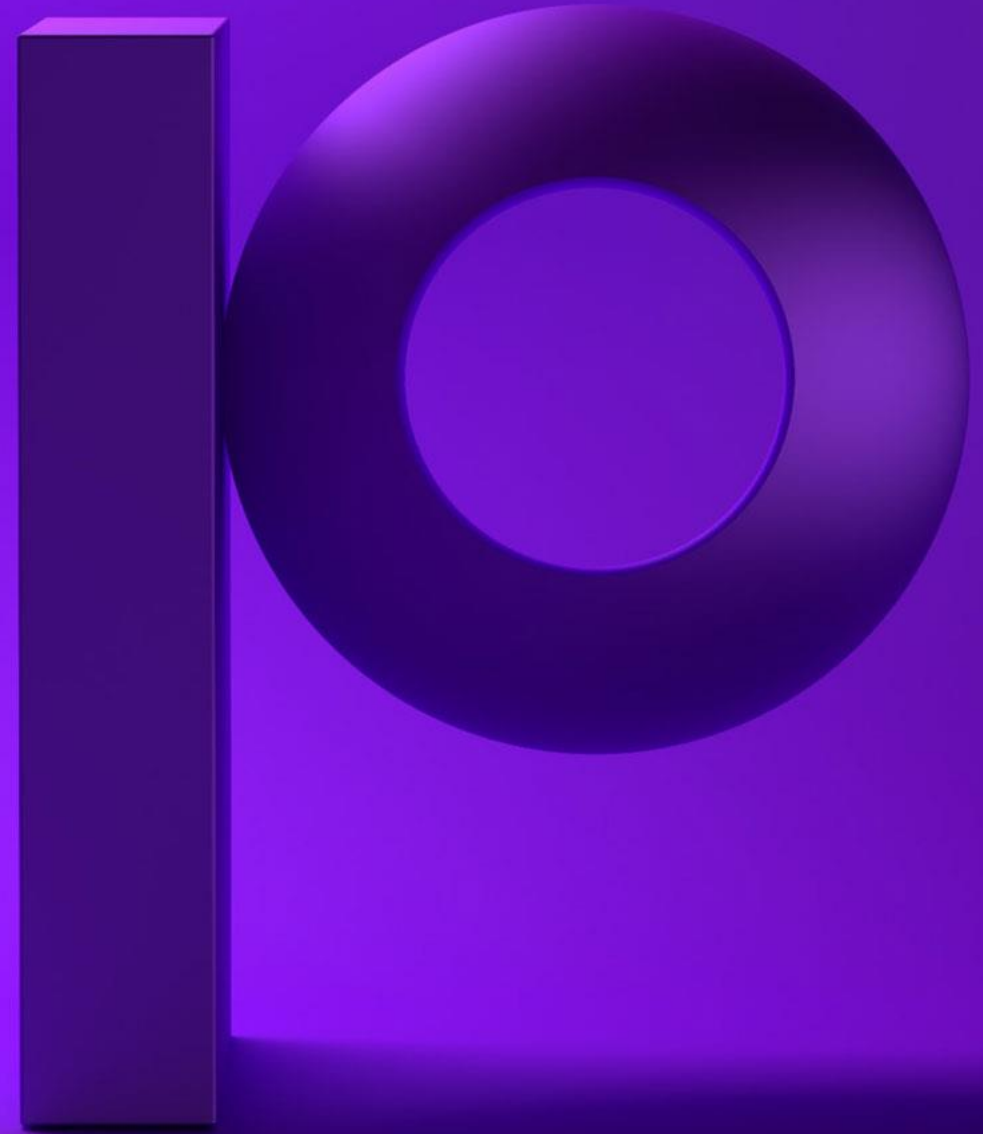
- Emerging cross-capability usage patterns
 - Find and Access
 - Discover and Observe
 - Cleanse and Enrich
- Cross-capability Data Catalog integration

Where We're Going

- Complete suite of capabilities
 - Data Quality
 - Spatial Analytics
 - Data Enrichment
- 2023 Themes
 - Core capabilities & common services
 - Connectivity & interoperability
 - Intelligence & automation
 - User experience & administration

Govern User Group Annual Survey

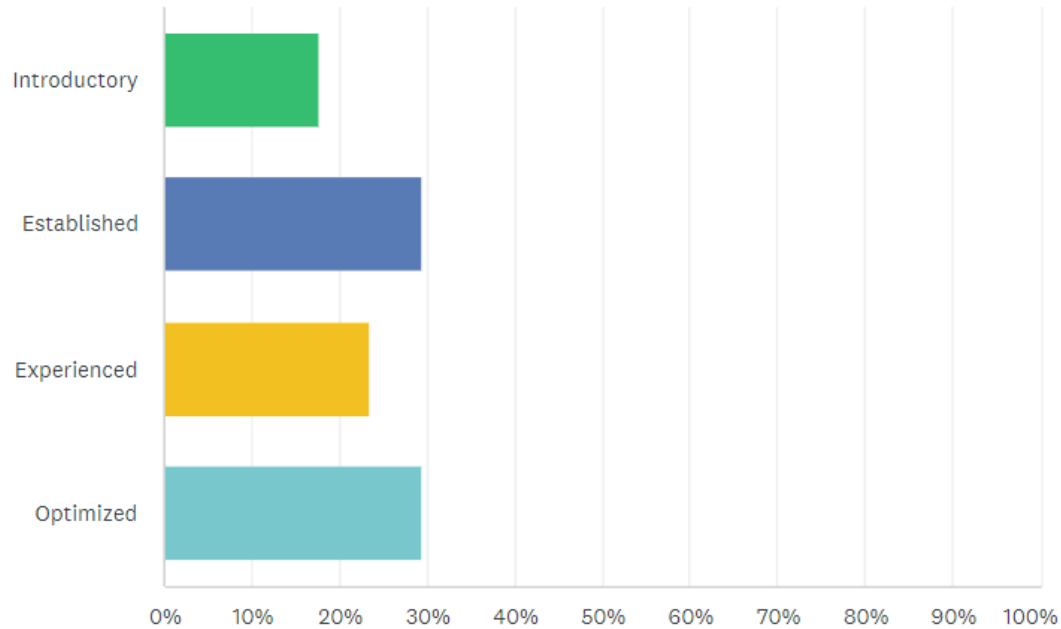
Mike Ortmann
Sr. Sales Engineer



What Do We Look Like?

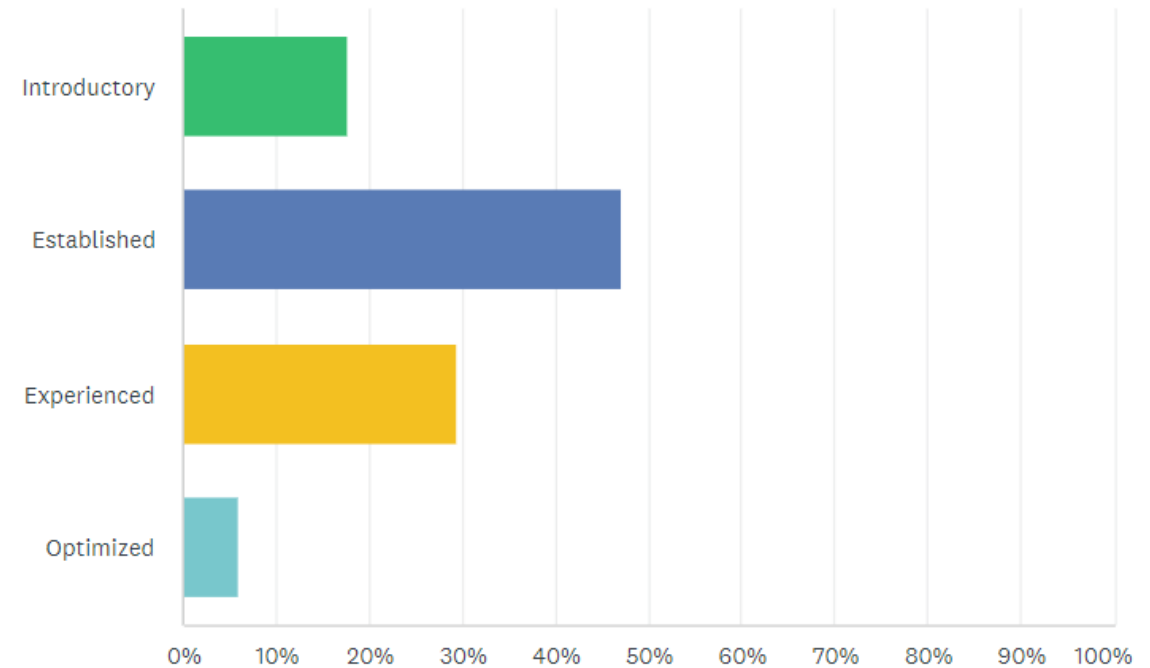
Your personal experience level in data governance (career):

Answered: 17 Skipped: 0



Your organization's maturity in Data Governance:

Answered: 17 Skipped: 0



Do More Of . . .	Number of Responses
How other organizations set up and use	6
Tips & Tricks/Best Practices/How To	6
Roadmap & Customer input regarding	5

Do Less Of . . .

Fewer slides

Less focus on business justification in presentations

Nothing—but please make sharing recordings & powerpoints easier

Other Topics To Cover

How others increase usage? Approaches to integrate Change Mgmt?

Tech deep dives

Getting over initial Implementation hurdles

Workflows Best Practices (More than User Guides)

DQ Integration

PowerBI and any functions that you provide within that tool

Data lineage and relationship creation in Govern

MetaData discovery in the Cloud. Dealing with serverless tech, dynamic architecture and full automation of data lineage in AWS/GPC or Azure

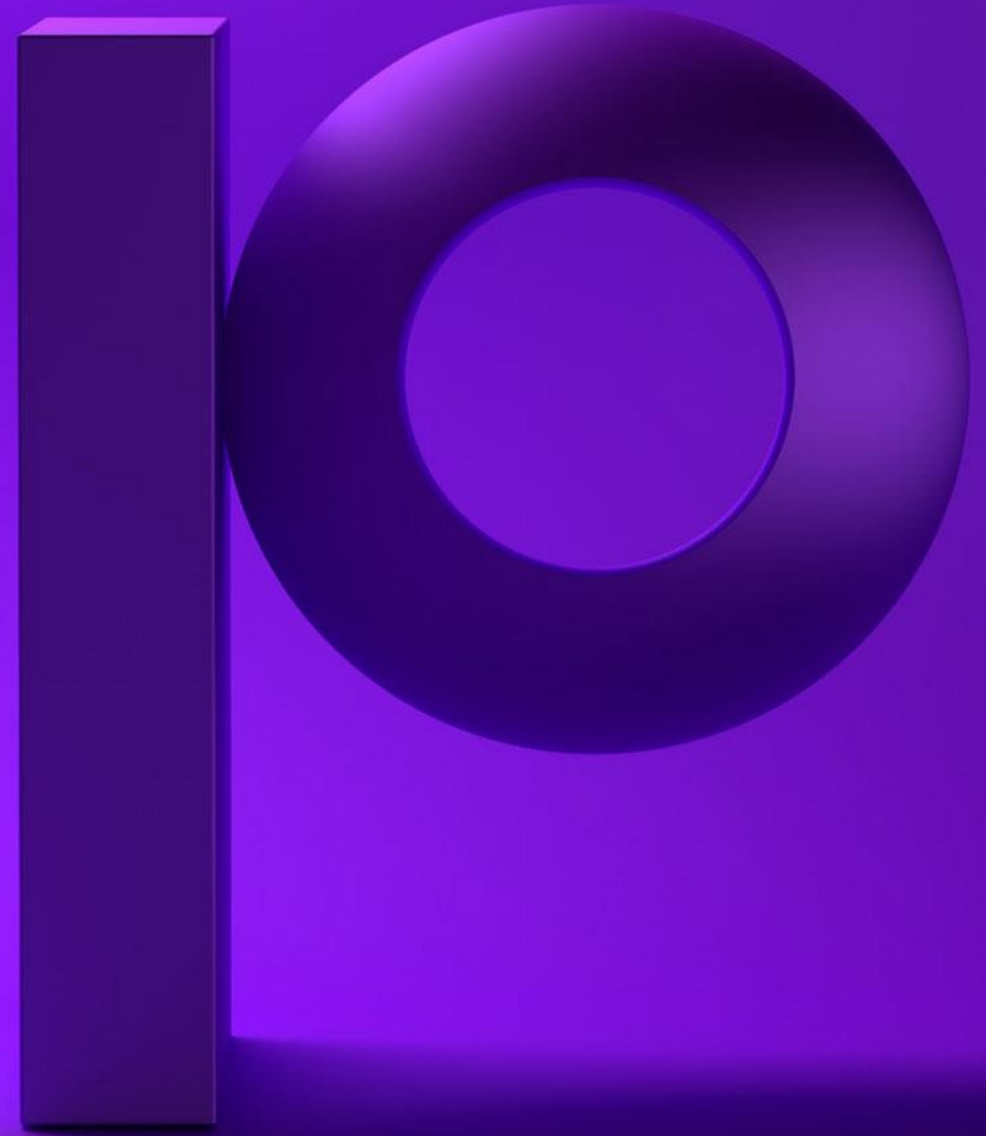
Thank You For Participating!

- Several interested in collaborating—we'll be in touch!
- NPS: 27 ('Likely to recommend')
- Recordings & powerpoints—easier to access and re-use

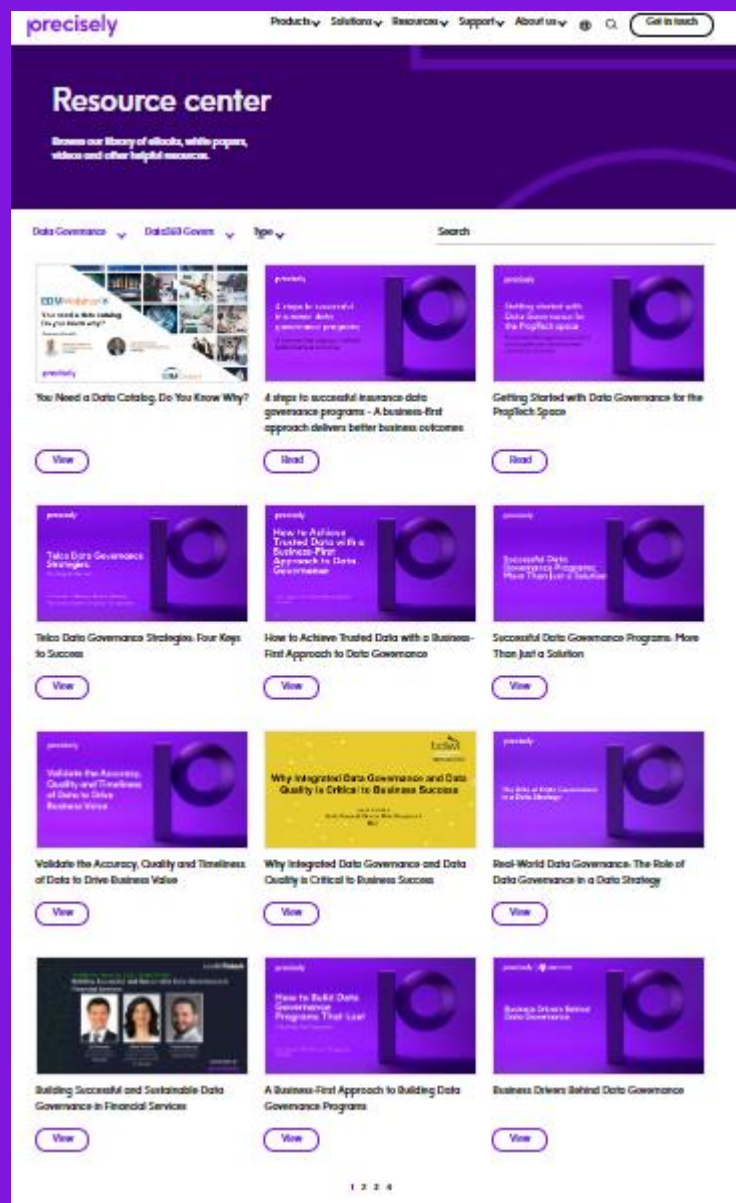


Question & Answer

Mike Ortmann
Sr. Sales Engineer



Precisely.com/Resource-center



Next Govern User Group February 16th, 2023

New Information

TDWI Checklist: Succeeding with Data Observability

[Link](#)

Upcoming Webinars

Data-Driven Decision Making: Fireside Chat with 451 Research and Precisely's Emily Washington, February 8th 11AM ET

[Register](#)

Dataversity Demo Days: Precisely Data Governance Demo

Modern Data Governance: Synergies with Quality & Observability: Feb. 15th Stay tuned [Link](#)

Precisely Governance in the News

Emily Washington 2023 predictions [VM Blog](#)

Pat McCarthy Why credible ESG Reporting Relies on Trusted Data

[Tech Target](#)

[Economie Matin\(FR\)](#)

[Top Business Tech \(UK\)](#)





Call for Submissions

2023 DGPO Data Governance

Best Practice Award

Deadline is March 3, 2023



Brenda
Stoetzer



Cheryl
Vogler



Christina
Costello



DeeDee
Jimenez



Jennie
Richardson



Liz
Dorner



Liz
Wright



Mursel
Kocak

Data360 Govern Customer Success Team



Mitch
Williams



Stephen
Morganson



Shabana
Fazal



Susan
Foor



Paul
Wheeler



Sarah
Smith



Tyler
Olkin



Younes
Benhaddou



Thank You!

precisely