

# Managing Metadata to Leverage Data Governance and Sourcing

## Case Study at an Investment Management Firm

*Using TopBraid EDG, this investment firm provided businesses with better and timelier access to information about what data is being used by which applications, along with metrics and reporting on data quality, data lineage, and data linkage. To quote one of the firm's project managers: "Businesses can now find the information they need without a Ph.D. in SQL."*

### PRODUCTS USED

**TopBraid Enterprise Data Governance (TopBraid EDG)** to connect and govern business and technical metadata across data sources and information domains. With TopBraid EDG, business vocabularies become an integral part of enterprise-level information management.

**TopBraid Live (TBL)** to dynamically deliver metadata services needed for data transformation, data integration and search.

### BENEFITS

- Improved information access by making the knowledge about the meaning of data available to search and data integration tools
- Governance of enterprise information assets
- Improved information quality across the organization
- Ability to facilitate seamless flow of data from one system to another
- Ability to meet regulatory compliance requirements
- Lower costs through minimizing redundancy of data
- Ability to flexibly model any metadata and data using W3C standards
- Integration with other enterprise applications through REST interfaces and other enterprise service buses

### Background on the Investment Management Firm

The company is one of the world's largest single-profession pension plans with over \$100 billion in net assets. The company pays pensions and invests plan assets on behalf of more than 300,000 working and retired professionals. Since its establishment as an independent organization more than 20 years ago, the firm has built an international reputation for innovation and leadership in investment management and member services.

### Challenges

With the business goal of building capabilities to support more effective decision-making, the company was looking to build a metadata repository to accomplish several objectives:

- Leverage data sourcing and governance work
- Quantitatively measure process improvements for data governance
- Make data and business analysis sourcing and processing more efficient
- Generate metrics on data usage and consistency

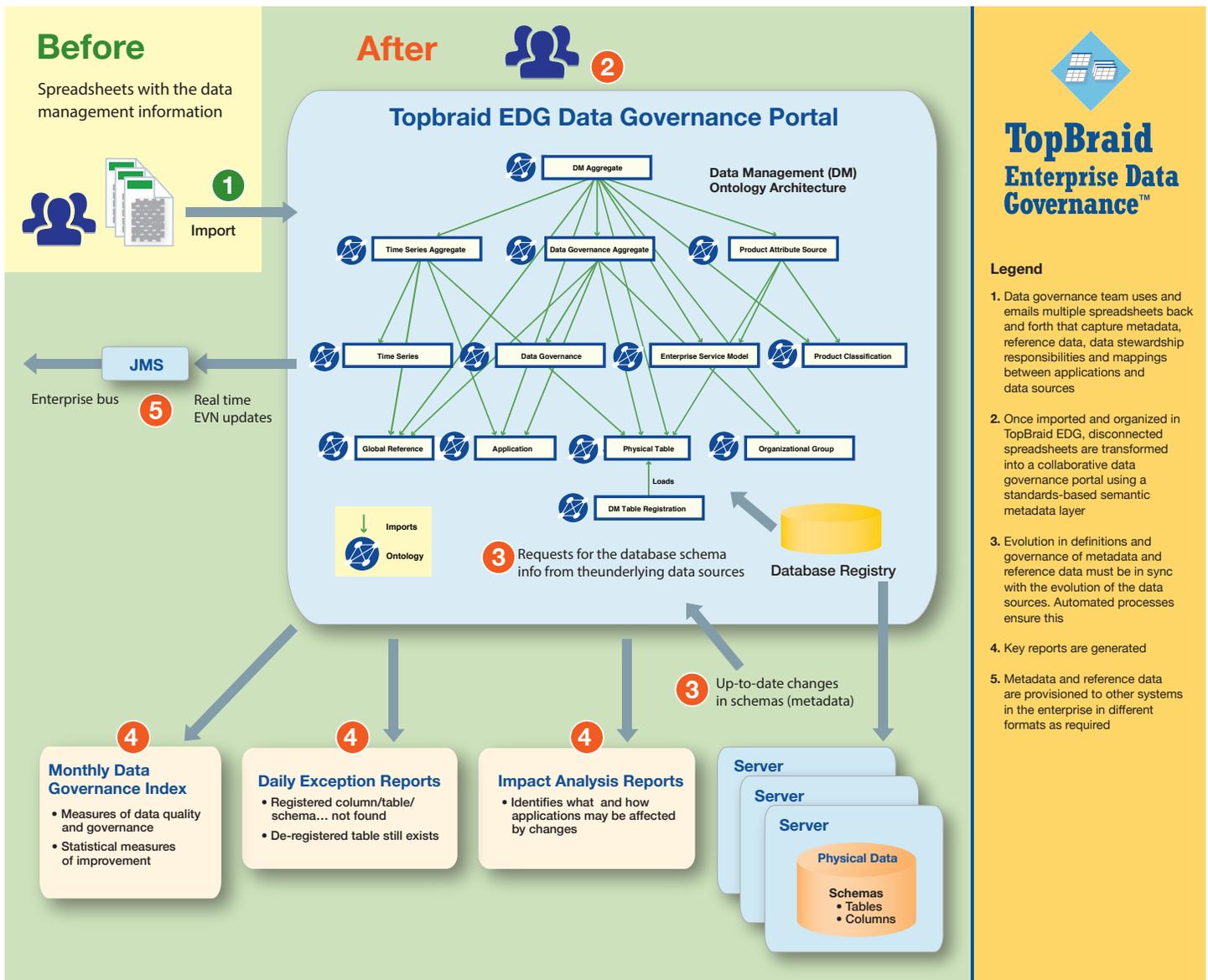
For the firm to accomplish these goals, it required techniques to capture diverse metadata. The company decided to use the World Wide Web Consortium's (W3C) semantic web standards because of the flexibility they provide for working with heterogeneous data and to take advantage of the growing market adoption of the standards-based technologies. With the capabilities of TopQuadrant's TopBraid Enterprise Data Governance (TopBraid EDG), the company was able to effectively support this initiative.



TopQuadrant helps organizations succeed in data governance. Its flagship product, TopBraid EDG, delivers easy and meaningful access for all data stakeholders to enterprise metadata, business terms, reference data, data and application catalogs, data lineage, requirements, policies, processes, and supports business stakeholders who need to collaborate on defining and linking enterprise taxonomies, ontologies and thesauri used to improve search, enhance content navigation and align the meaning of data across data sources.

Visit [www.topquadrant.com](http://www.topquadrant.com), or contact us at [edg-info@topquadrant.com](mailto:edg-info@topquadrant.com) or by phone at +1 919 300 7945.

Ask us about scheduling a demo to explore how TopBraid EDG meets your specific requirements.



## Solution

The first step for the firm was to connect multiple data types such as databases, spreadsheets and documents that were stored in a content management system, in XML and other formats and put them into a common framework. Since data definitions change, the firm's requirements for the metadata management system included managing and updating of changes from each data source and the retaining of a full audit trail of all changes.

Once the data had been connected, name-alignment transformations were defined to assign Uniform Resource Identifiers (URI) to all enterprise concepts, so that the data could be shared, merged, and re-used across multiple applications. This allowed business users to locate different types of data across formats, applications and subject areas. Covered subject areas include the following:

- Countries
- Currencies
- Financial Instruments
- Legal Entities
- Products and Assets
- Time Series Data

TopBraid EDG is an open and highly configurable system easily extended with customer-specific rules, reports and user interface customizations. To satisfy the core requirement of providing real-time compiled information

for quarterly reporting, TopBraid EDG was extended to produce reports for the firm's Data Governance Index (DGI). DGI is a quantitative metric designed by the company to measure the degree of governance of its Enterprise Data. An internal council uses this to measure data governance improvements. DGI allows the firm to properly identify how data is being used in various divisions throughout the organization.

Another core requirement was to develop a curated table registry of physical data assets used in the enterprise. This registry defines data assets that Data Management tracks and enriches with metadata from various sources, all integrated by TopBraid EDG. Daily exception reports are produced to register new database tables and to track changes in physical tables to ensure real-time accuracy of data management measures.

## Results

Currently, the firm has captured more than 13,000 types of data across multiple interconnected vocabularies. Using the DGI index, the the company ensures that its data has managed processes and controls, identified data stewards, required quality checks, service level agreements, and other data quality measures.