

**OLFAI & DATA**



Egeria Webinar

# WHAT NEXT AFTER YOU HAVE BUILT YOUR CATALOG? PART 2 – MAKING IT REAL

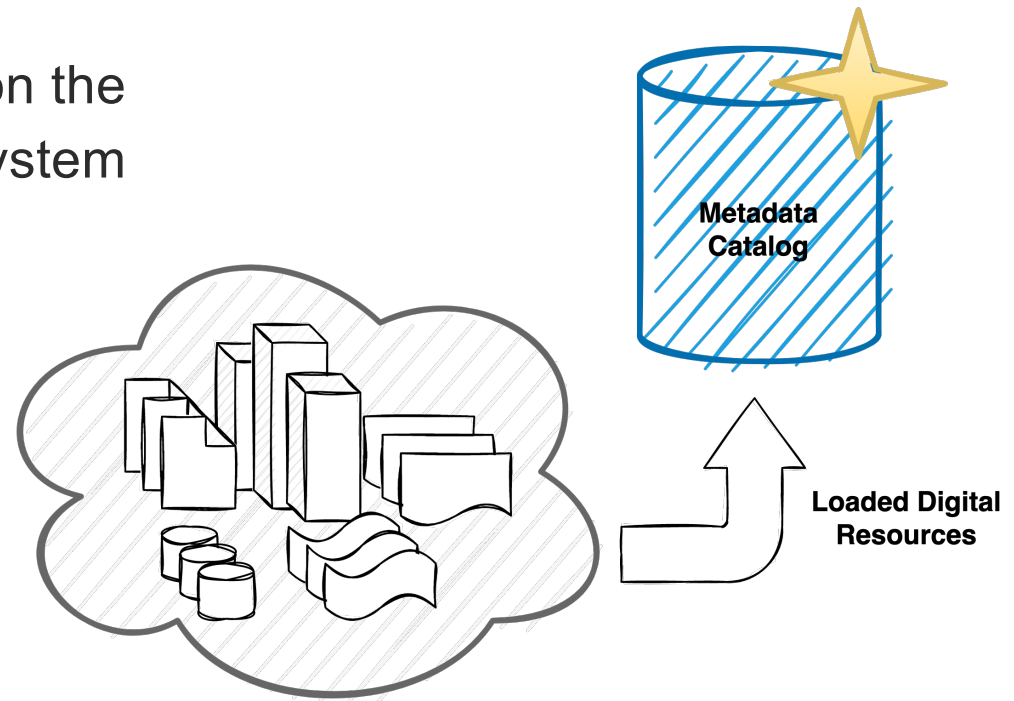
Mandy Chessell CBE FREng  
PDR Ltd (<https://pdr-associates.com/>)  
Egeria Open Source Project Lead

# Egeria's Webinar Series

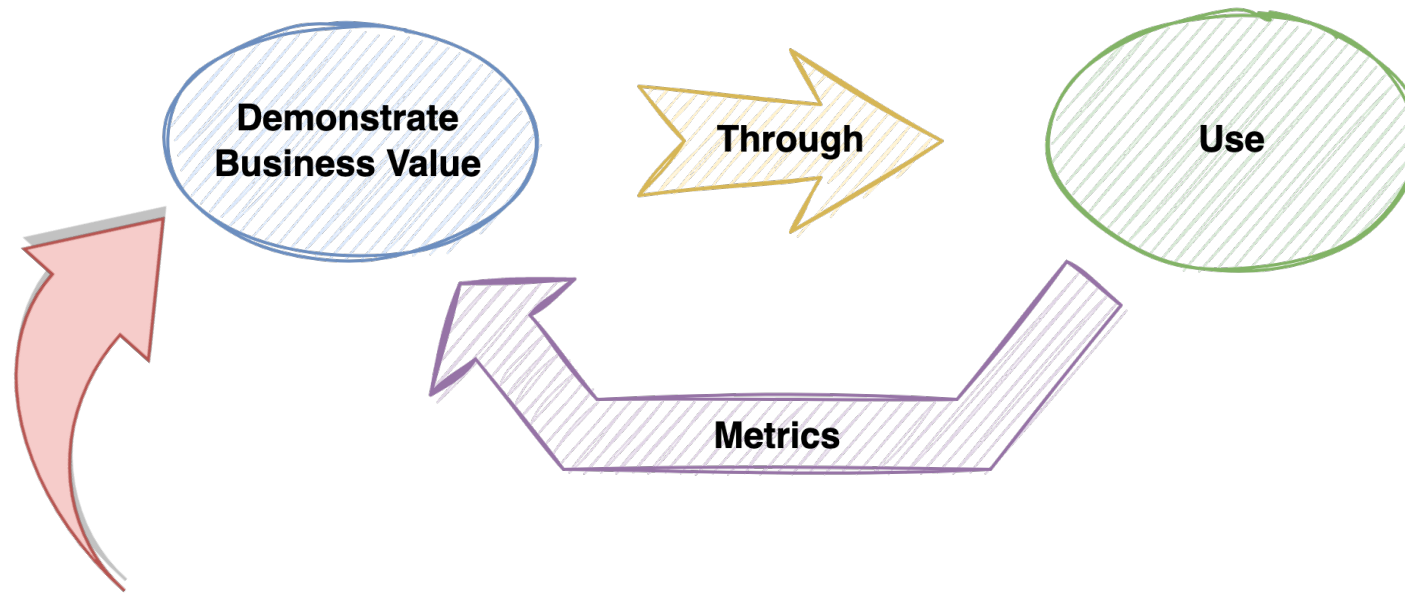
<b>7th November 2022</b>	15:00 UTC	<b>How to use a repository proxy connector</b>	<p>Ever wanted to use an OMRS <a href="#">repository proxy connector</a></p> <p>A repository proxy connector is a wrapper around an existing 3rd party metadata store, that allows that 3rd party metadata store to participate in Egeria cohorts. This session takes you through how to use a repository proxy connector, so existing 3rd party metadata stores can benefit from being in the Egeria eco system.</p> <p>Zoom Conference <a href="https://zoom.us/j/523629111">https://zoom.us/j/523629111</a></p>	<p><b>Ljupcho Palashevski</b></p> <p><b>David Radley</b></p>
<b>December 2022</b>	N/A	N/A	Northern hemisphere winter break	
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## What next?

- You have built a new metadata catalog
- Perhaps this catalog is being automatically populated based on the technology found in the IT ecosystem
- Is that it ..?



# Embracing the challenge



This is your biggest challenge



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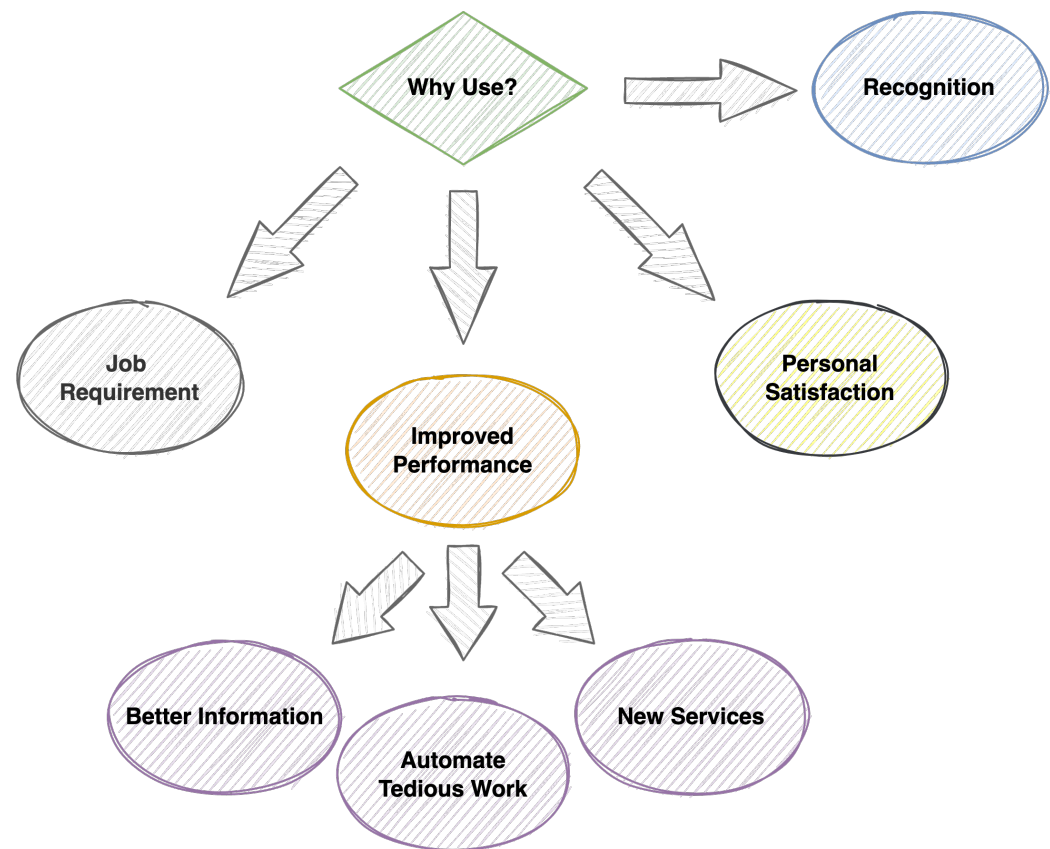


The  
**EGERIA**  
Metadata Show

# WORKING WITH THE INDIVIDUAL

# Motivation

- Why would a person use your metadata catalog?
- To answer this question takes a deep understanding of an Actor's needs, motivations and aspirations.



# Coco Pharmaceuticals persona



**Jules Keeper, CDO**



**Tessa Tube,  
Chief Researcher**



**Faith Broker  
Chief Privacy Officer**



**Nancy Noah  
Cloud Specialist**



**Erin Overview,  
Information Architect**



**Bob Nitter,  
Integration Developer**



**Callie Quartile,  
Data Scientist**



**Gary Geeke  
IT Infrastructure**

# Different personas need different services

**Callie Quartile  
Data Scientist**



Find data  
Understand data  
Manage analytics models

Build data strategy  
Define governance program  
Monitor progress



**Jules Keeper  
Chief Data Officer**

# Different personas need different services

**Faith Broker**  
**HR and Privacy Officer**



Locate personal data  
Ensure protection of personal data  
Understand employee needs

Maintain “safe” IT Infrastructure  
Build and deploy “good” APIs and services  
Locate and resolve issues fast



**Gary Geeke**  
**IT**



## Different personas need different services

**Tanya Tidie**  
**Clinical Trials Administrator**



Maintain accurate patient records  
Catalog clinical trials data  
Demonstrate good data management practices

Understand risks to organization  
Set up protection  
Monitor for suspicious activity



**Ivor Padlock**  
**Chief Security Officer**

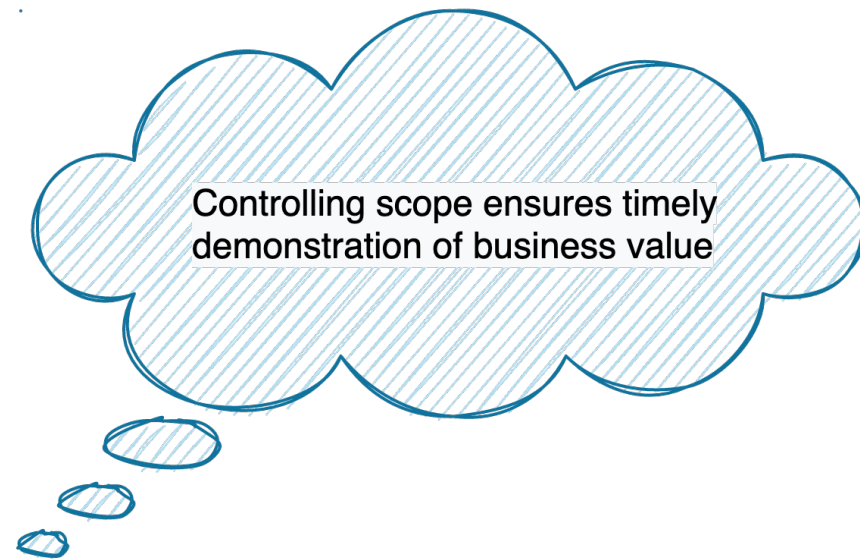
## Callie Quartile – Data Scientist



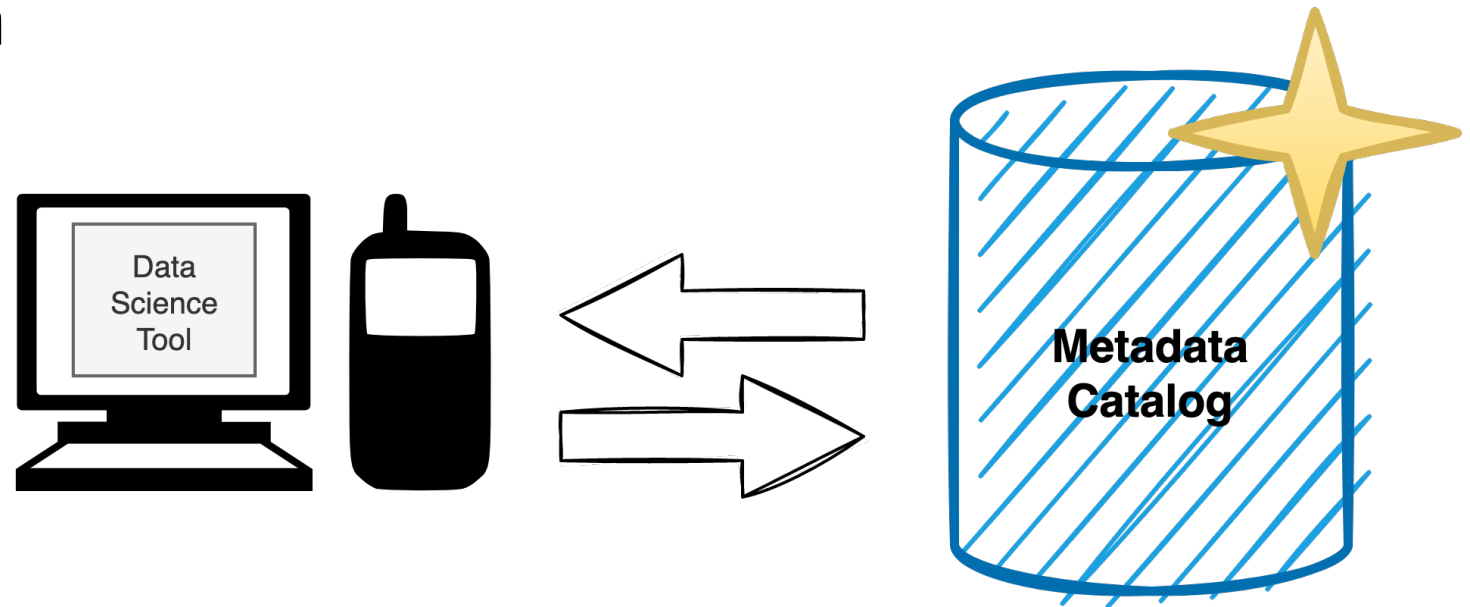
- I want to:
  - Find the data I need
    - To know its context and what I can rely on
    - To know what is NOT available
  - Get access to the data I need
  - Get my new analytics into production to help the researchers

# Scope

- Which part of the business
  - Project?
  - Division?
- Which users
  - Within the role?
  - Within a team?

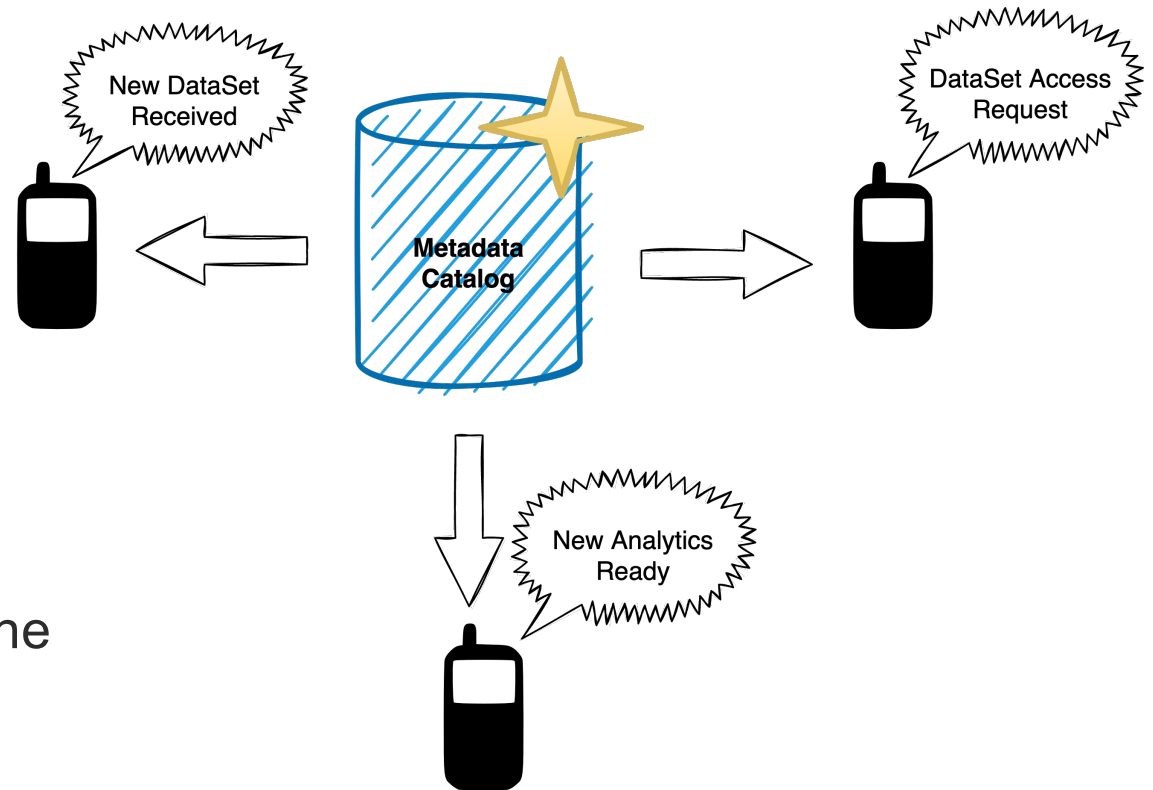


## Tool integration



- Integrate with existing tools
- Think broadly (eg email, instant messaging)
- Make two-way to allow feedback and contribution
- Support key notifications ...

# Notifications



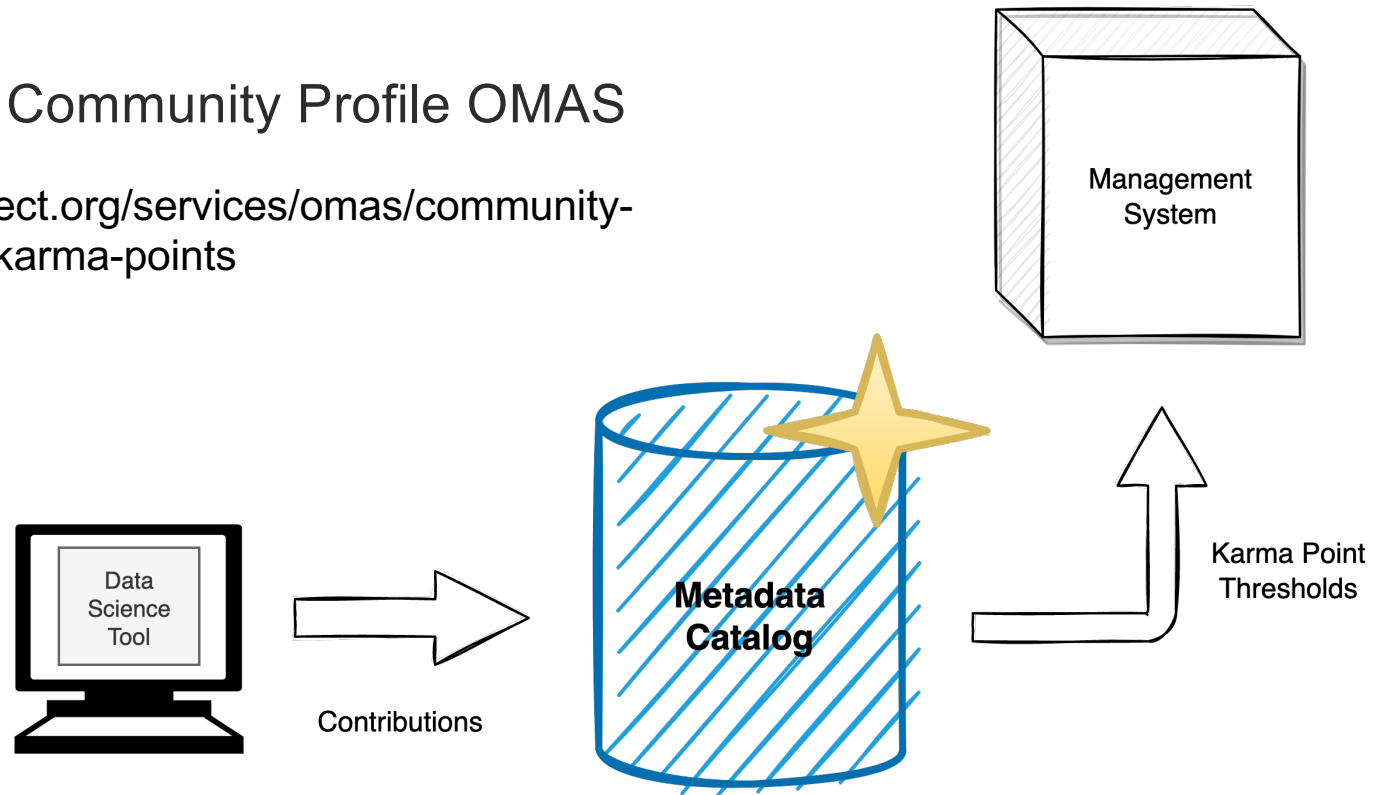
- Getting the right information to people as quickly as possible
- Growing collaboration across the business



# Recognition for contribution

- Enabled via the Community Profile OMAS

<https://egeria-project.org/services/omas/community-profile/overview/#karma-points>



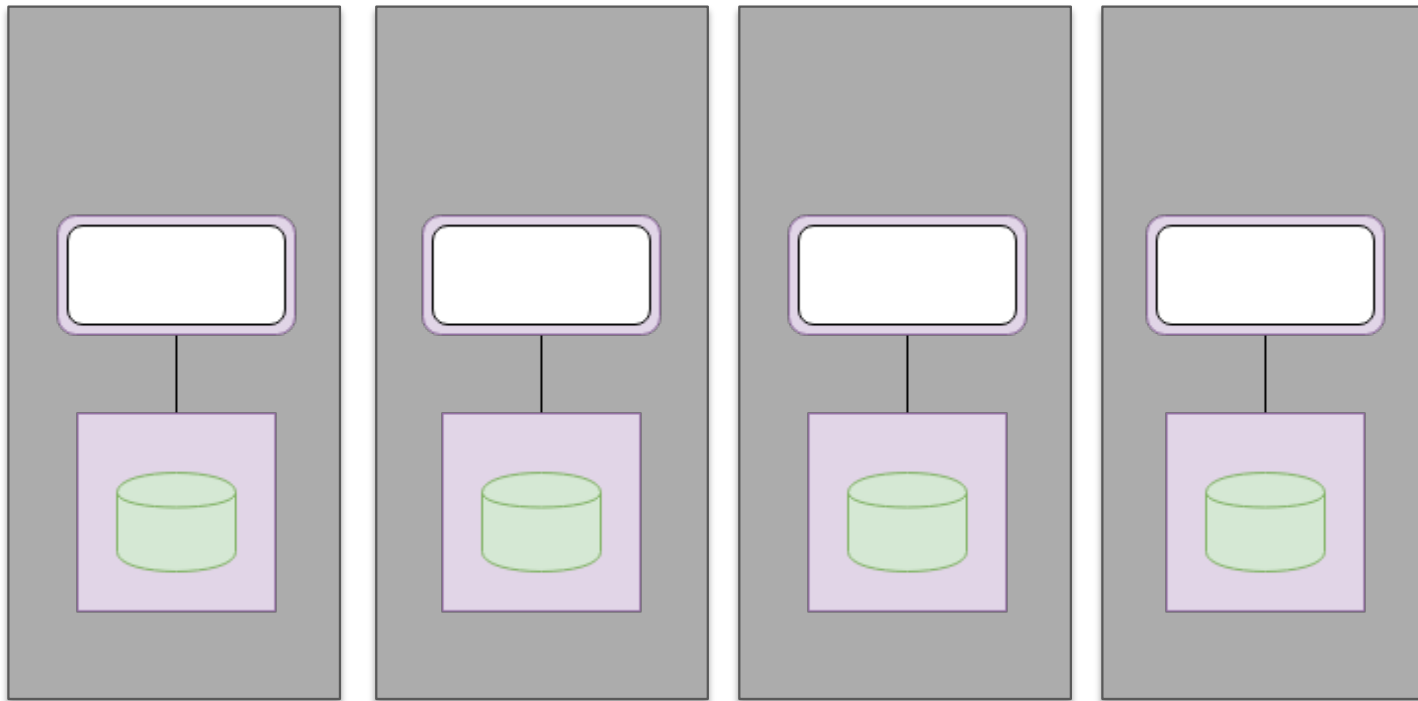
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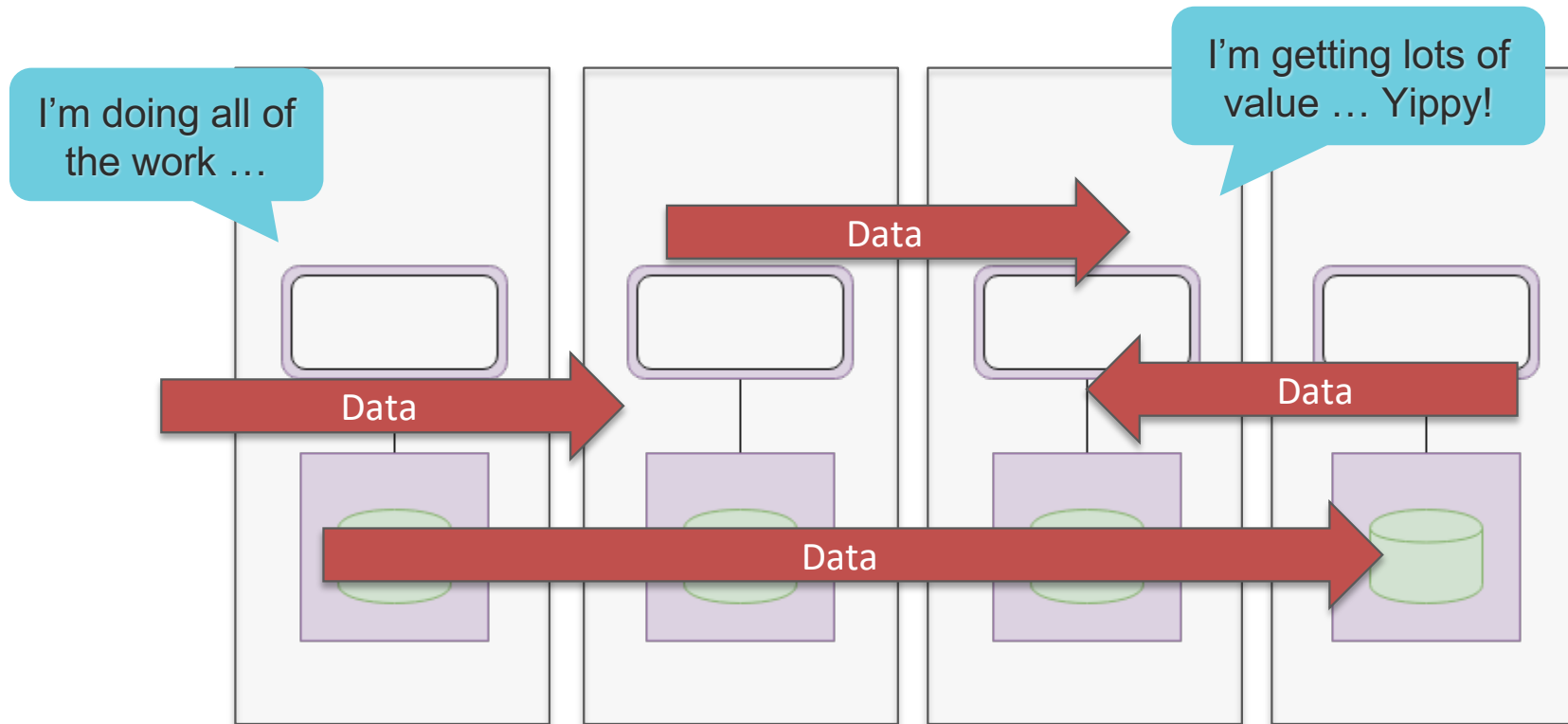
# SOLVING ENTERPRISE CHALLENGES

## Understanding organizational motivation



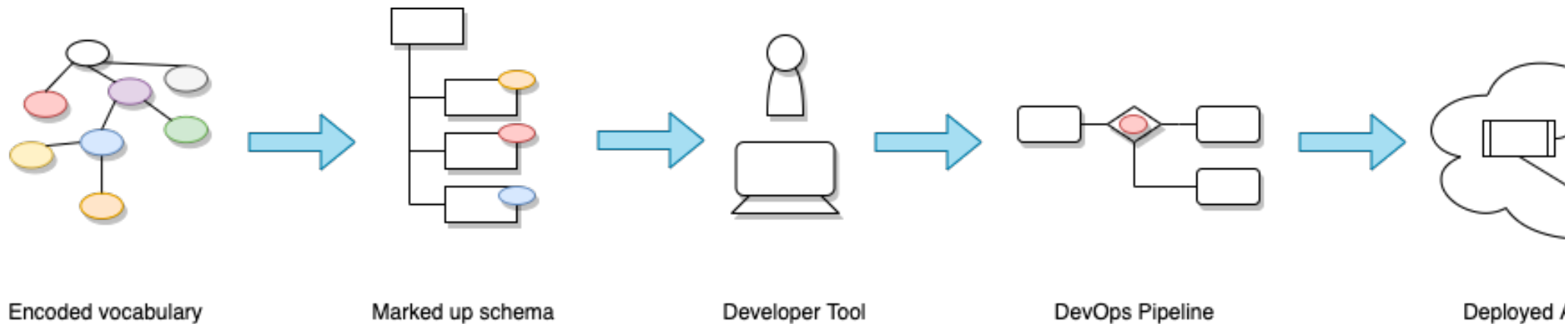
Organization Silos

## Different perceptions (and kinds) of value



Organization Silos

## Value flow ...

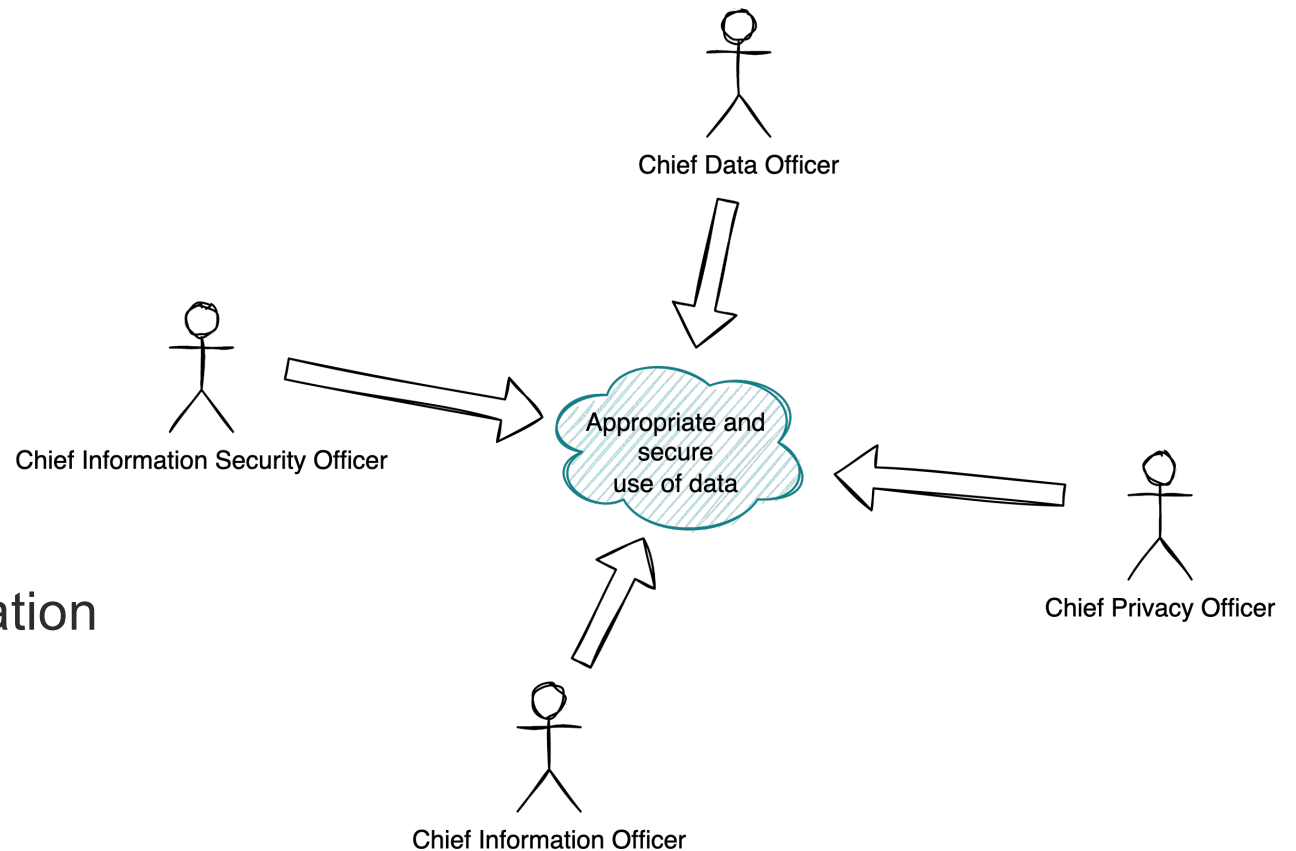


- Each stage delivers value locally
- Need to enable both collaboration and communication to improve value
- Need a stakeholder that cares about the end-to-end value to invest further

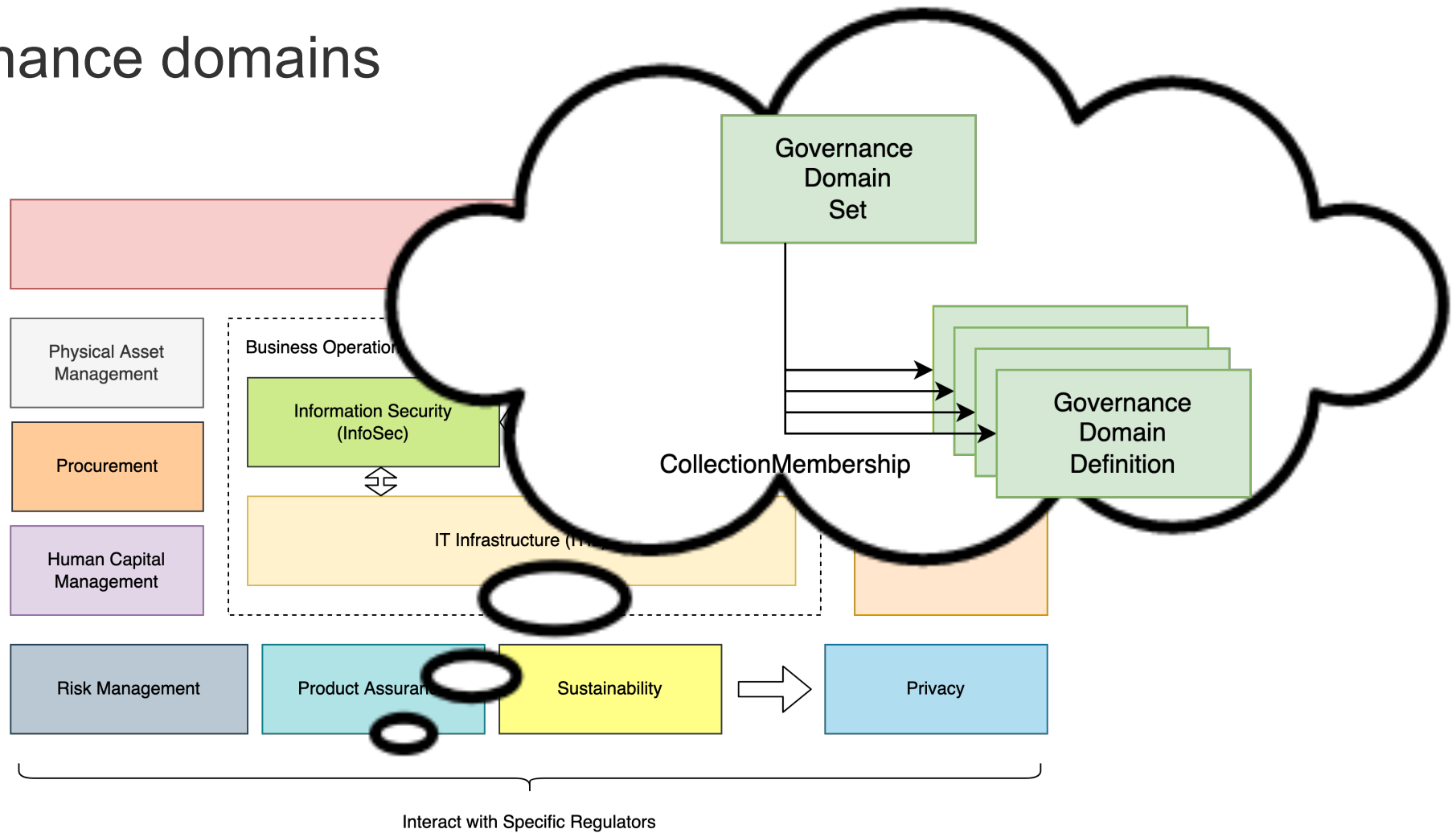


# An enterprise has many overlapping problems

- Different leaders
- Different budgets
- Different missions
- Using different tools
- Solution requires collaboration

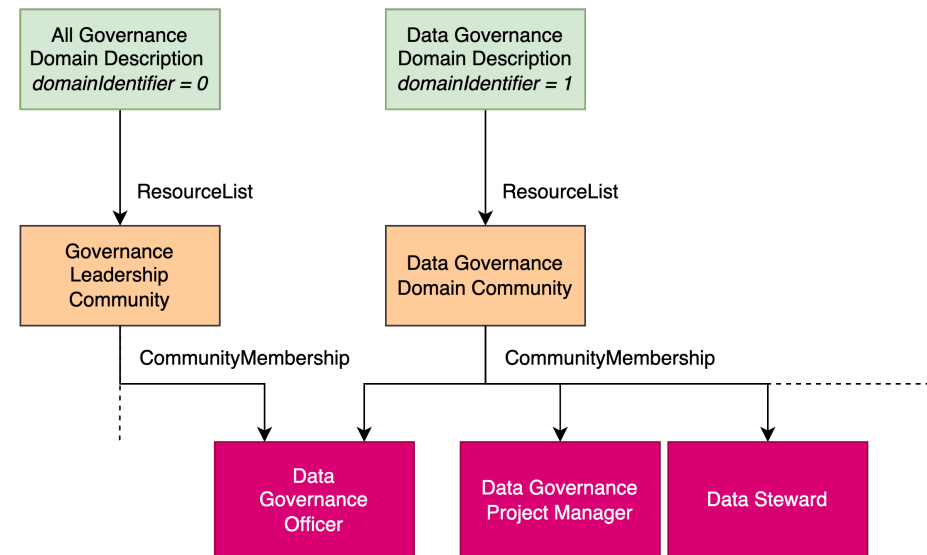


# Governance domains



# Building communities

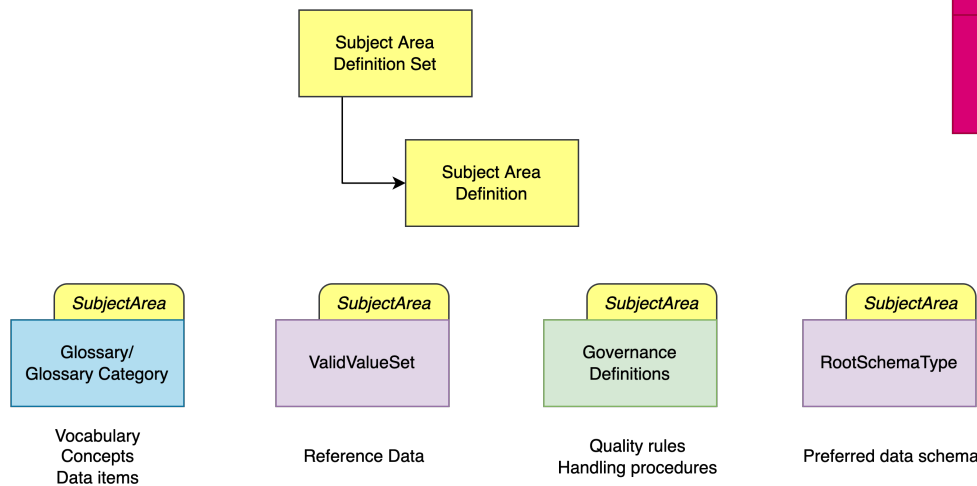
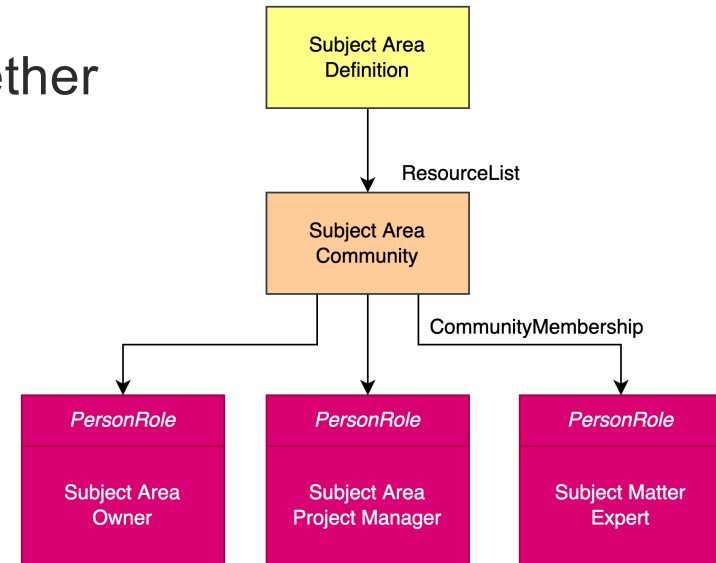
- Bring people together across the organization
  - Roles
  - Resources
  - Contact Information
  - Shared mission



<https://egeria-project.org/guides/planning/governance-program/overview/>

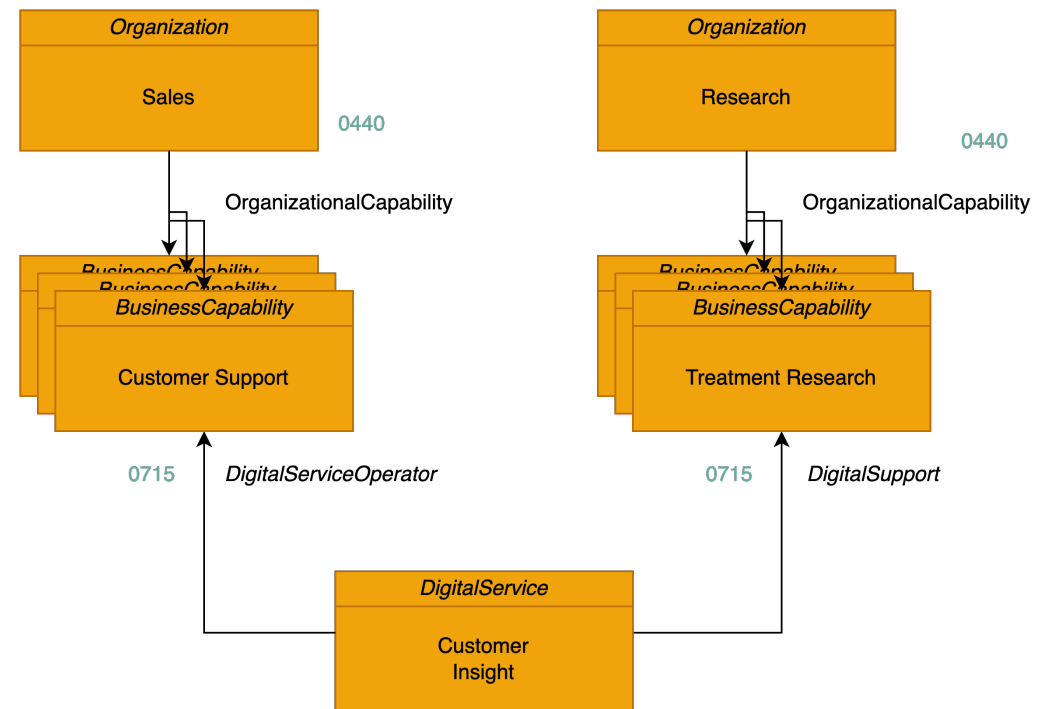
# Subject areas – building shared value

- Community brings subject-matter experts together
  - Coordinates development of subject area materials
  - Ensures recognition of key individuals
  - Champions value of subject areas



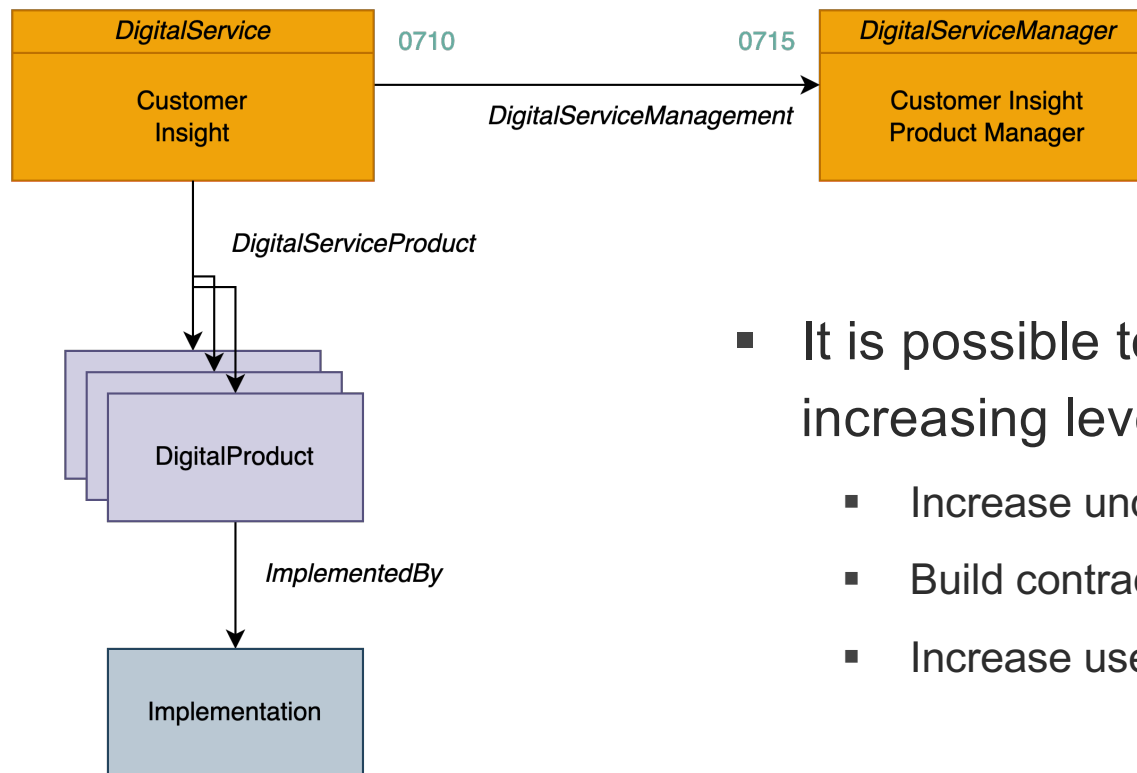
# Business domains

- Modelling business domains in Egeria shows the interdependencies between different parts of the organization





# Digital services and digital products

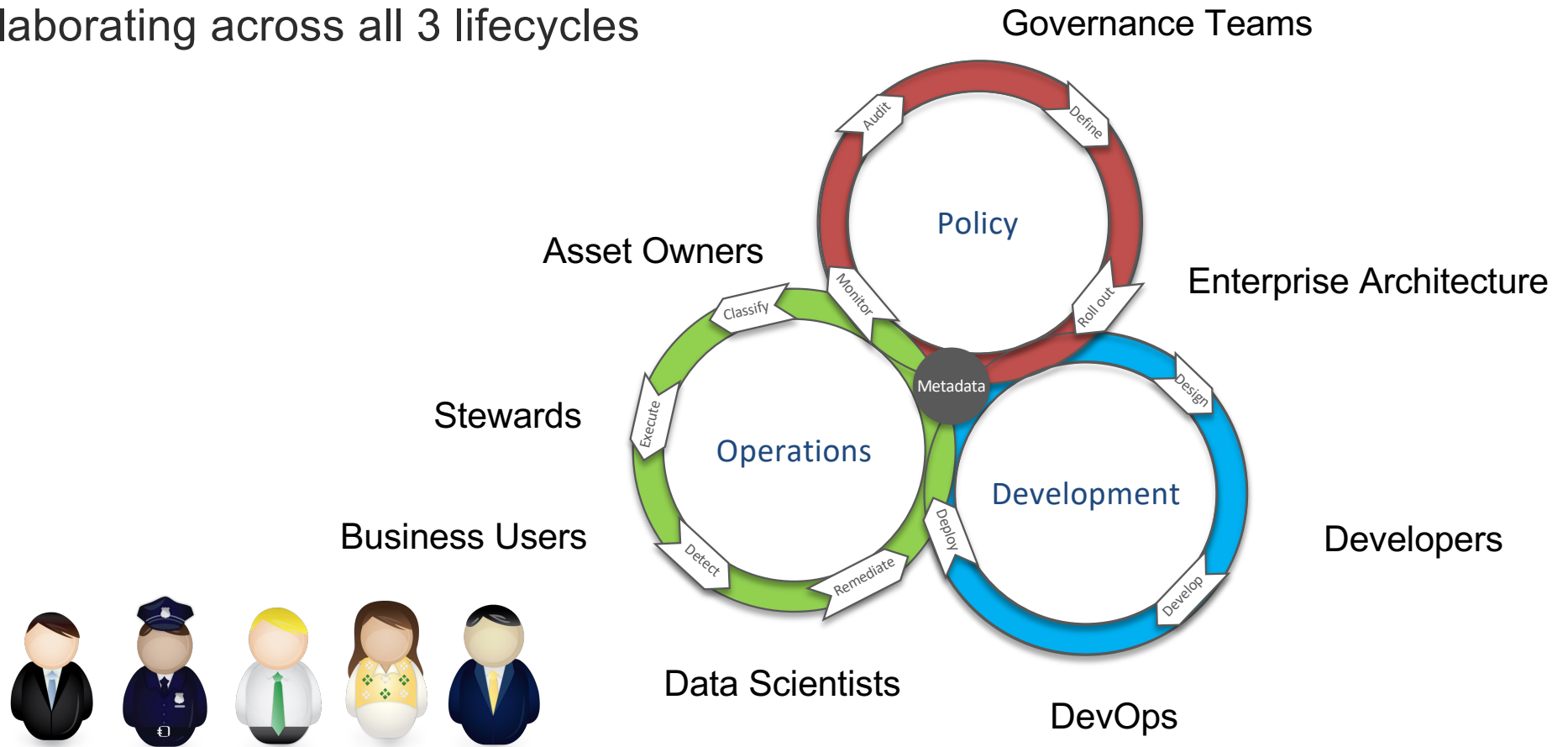


- It is possible to model the dependencies at increasing level of detail:
  - Increase understanding
  - Build contracts, trust and collaboration
  - Increase use of shared definitions

<https://egeria-project.org/types/7/0710-Digital-Service/>

# The data driven organization ...

- Collaborating across all 3 lifecycles



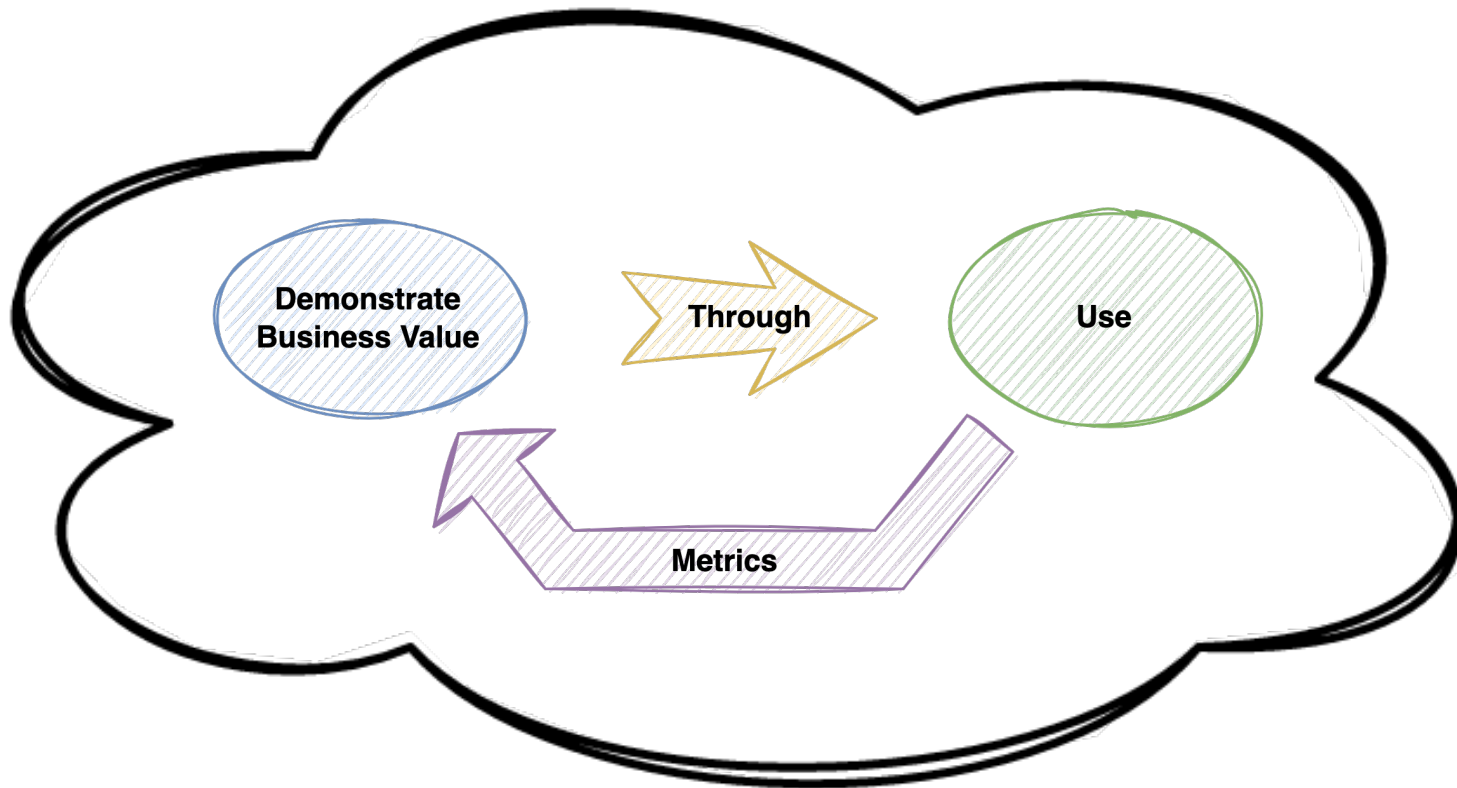
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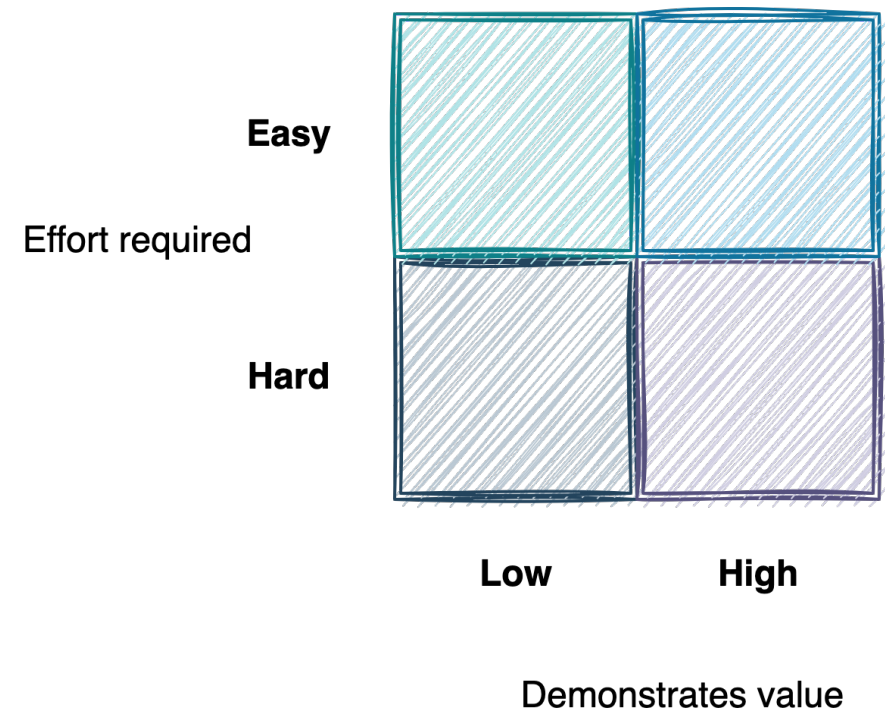
# THINKING ABOUT METRICS

# Metrics



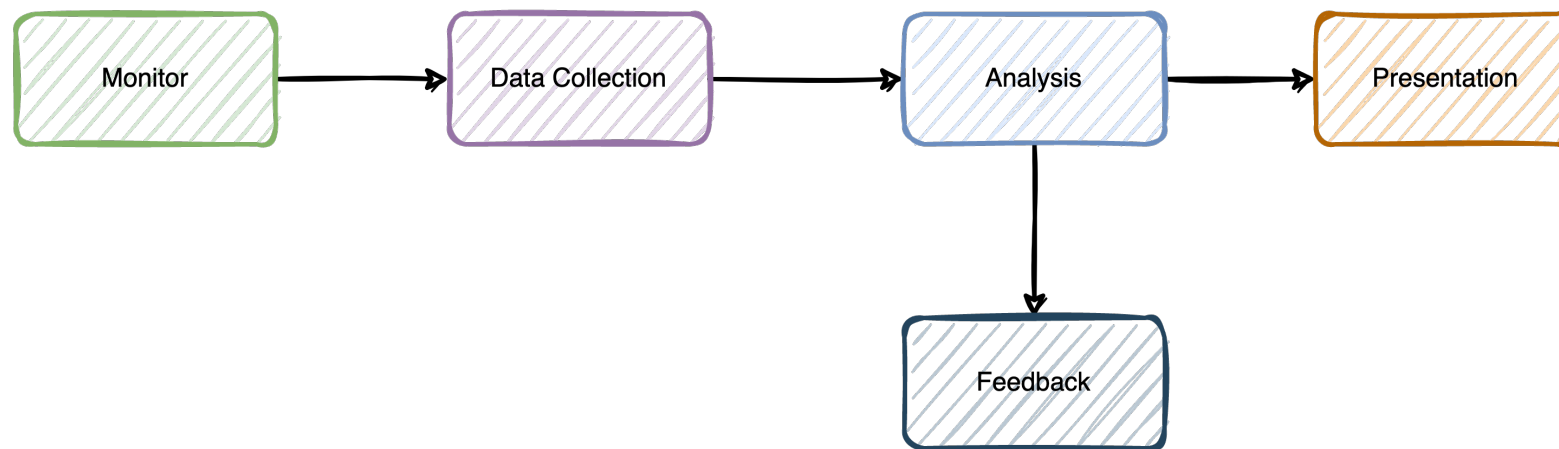
## Designing metrics

- What questions need to be answered?
- How should the metrics be measured?
- Who reviews and refines?



## Designing metrics

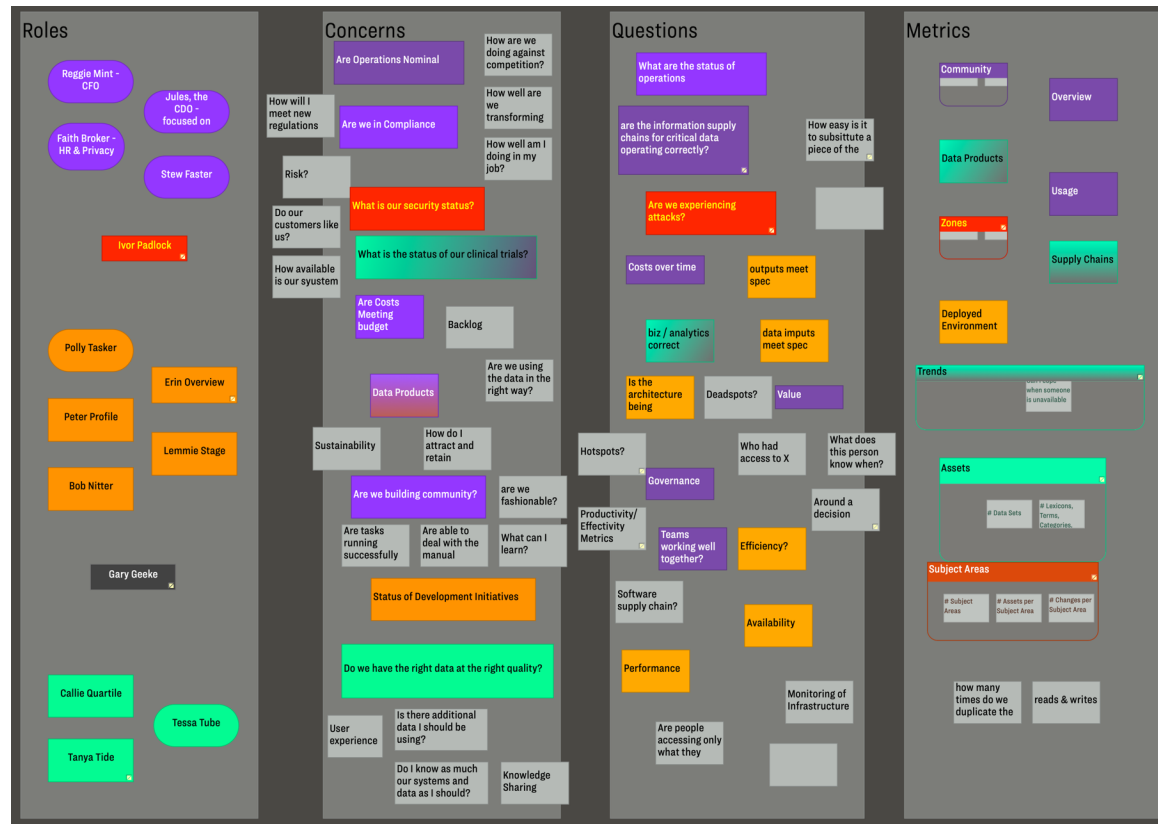
- Five stages needing design



## Types of metadata metrics

- Simple queries direct on the metadata repository
  - Counting elements, activity, relationships, consumption
  - What about the cost of the query – eg paging can be expensive?
- Creation of a historical store from the metadata APIs and notifications
  - Easier for report writers
  - Requires automation
- Requiring human input such as a satisfaction survey

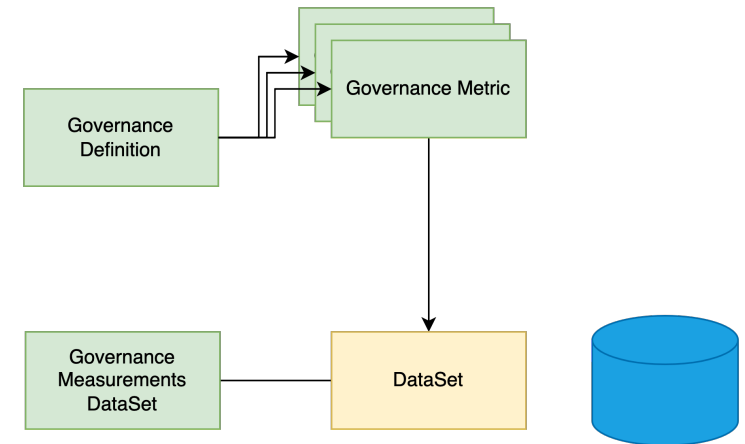
# Metrics map





# Coordinating all types of metrics through Egeria

- Egeria can record:
  - Definition of metrics
  - Links to where metric is relevant
  - Locations of measurements
    - Within an external data set



- Attached to associated metadata element.



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Metadata Show

# CONCLUSIONS

Metadata provides indirect value  
- not an end in its own right

Focus on increasing use  
- more people, wider use cases

Ensure metrics demonstrate business value  
- to all that need to know

# Open forum



# Egeria Webinar Series

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# Future webinars

Date	time	Title	Description	Presenter
???	15:00 UTC	<b>Kubernetes operators and Egeria</b>	This session will cover how easy it is to run Egeria in Kubernetes and how the Egeria Kubernetes operator can be used to manage Egeria in a Kubernetes environment. Zoom Conference <a href="https://zoom.us/j/523629111">https://zoom.us/j/523629111</a>	<b>Nigel Jones</b>
???	15:00 UTC	<b>What next after you have built a catalog. Part 3: strategic view</b>	Becoming more mature with data governance, eventually enabling data citizenship. Data citizenship within an organisation supports people who need access to data to be effective in their role. This data access needs to be embedded in the tools that they use and flexible enough to meet the changing challenges they face day to day. Since the data landscape is also changing, the tools that these people use need to be integrated with the data catalog. Zoom Conference <a href="https://zoom.us/j/523629111">https://zoom.us/j/523629111</a>	<b>Mandy Chessell</b>
???	15:00 UTC	<b>Managing metadata quality</b>	Callie Quartile is a data scientist at Coco Pharmaceuticals. Her work ranges from supporting marketing campaigns through to analysis of measurements collected during clinical trials and other research phases of Coco pharmaceuticals' product development. She relies on the metadata managed within Egeria to find and then select the data to use in her data science. Errors in the metadata could cause her to miss some vital data, or interpret it incorrectly, and this could have serious consequences for her research work.  Metadata, just like any other type of data, needs maintenance and governance to ensure it is complete and correct. In this webinar, we will examine the different aspects of metadata quality and the mechanisms in Egeria to ensure it is maintained. Zoom Conference <a href="https://zoom.us/j/523629111">https://zoom.us/j/523629111</a>	<b>Mandy Chessell and Dan Wolfson</b>
???	15:00 UTC	<b>Taming the data integration challenge</b>	Bob Nitter is an integration developer working at Coco Pharmaceuticals. He is building the data pipelines that integrate their business systems, manufacturing systems and data scientists. He is faced with understanding many different technologies, all using different terminology, data formats and code values.  How can Egeria's metadata management help Bob tame the integration challenges he faces?  In this webinar we will look at the common challenges faced by integration developers and show how different types of metadata, and the mechanisms that support it, can help. Zoom Conference <a href="https://zoom.us/j/523629111">https://zoom.us/j/523629111</a>	<b>Mandy Chessell and Dan Wolfson</b>
???	15:00 UTC	<b>Egeria and python</b>	Callie Quartile is a data scientist at Coco Pharmaceuticals who prefers to work in python. How can we extend Egeria's services into the python world?  In this webinar we will cover examples of the types of tools that use python and the process to design Egeria's clients for this world. Zoom Conference <a href="https://zoom.us/j/523629111">https://zoom.us/j/523629111</a>	<b>Dan Wolfson</b>
???	15:00 UTC	<b>Policies are not just for security</b>	Coco Pharmaceuticals is in the process of transforming its business from traditional generic treatments to personalized medicine. This has required faster cycle-times for many of their business processes as well as greater sharing of data and IT services. Automation is key to their success.  This webinar examines different types of policies and how they are used to drive automation across a business such as Coco Pharmaceuticals. Zoom Conference <a href="https://zoom.us/j/523629111">https://zoom.us/j/523629111</a>	<b>Mandy Chessell and Dan Wolfson</b>
???	15:00 UTC	<b>Integrating stewardship into your metadata ecosystem</b>	Coco Pharmaceuticals are the victims of a fraud relating to the purchase of supplies. They realize that they need better control of the data about their suppliers. They begin to add new automated data pipelines, with data quality and controls to improve the quality and security of their supplier data. Although automation covers much of the work, they need to integrate people into the processing to validate, resolve and approve different detected situations.  This webinar describes how to integrate people into your automation so that approvals and choices can be made on how to remediate unexpected, or new situations. It includes integration with incident management and workflow systems. Zoom Conference <a href="https://zoom.us/j/523629111">https://zoom.us/j/523629111</a>	<b>Mandy Chessell</b>
???	15:00 UTC	<b>Building a sustainability initiative</b>	Tom Tally is a recent graduate with ambitions to become a director at Coco Pharmaceuticals. Even though she has only been in the company three years, she is already the manager of the accounts department. In order to give her a stretch assignment, she is asked to lead the new sustainability initiative at Coco Pharmaceuticals. She is given two experienced leaders, Erin Overview and Stew Faster, to help her. The challenge is to create an ongoing attention to sustainability across Coco Pharmaceuticals' complex business.  This webinar takes you through Tom's journey to set up and operate Coco Pharmaceuticals sustainability initiative and the role that Egeria plays. Zoom Conference <a href="https://zoom.us/j/523629111">https://zoom.us/j/523629111</a>	<b>Mandy Chessell and Dan Wolfson</b>



# THANK YOU!

All the Best Wishes for 2023

