

# Welcome!

## Zoom housekeeping and navigation

If you can hear us now, you're all set.

At this time, you are **muted by default** and should only be able to hear the presenters speaking.

To **enable audio**, raise your hand 🙋!

*If you are having issues joining audio via the web, using the dial in numbers provided in the Chat.*

Please enter any questions you have into the **Q&A** section on the right side of your screen.

**Technical issues?** Use 'Chat' feature  
**To submit questions** use 'Q&A' feature  
**Audio issues?** Check 'Audio settings'

**Welcome! We'll be starting shortly. While you wait...**

Use the chat box to introduce yourself. Please share your **role** and your **location**.



# Data Citizens Circles

Trusted Business Reporting in Action

October 2023



# **DATA** **CITIZENS** 24

**SAVE THE DATE**

**April 9-11** • Orlando, Florida

# Agenda

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**01** Current BI Governance Challenges, offering & metrics + Stitching Focus (15 minutes)

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**02** Drive Value with Trusted Business Report + Certification Process (10 minutes)

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**03** Engie: Successful Implementation (10 minutes)

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**04** Q/A (10 minutes)

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**05** Wrap-up: Adoption Tips (10 minutes)



## Anouk Gorris

Senior Product Manager  
**Collibra**



## Dmytro Lugovyi

Senior Customer Success  
Technologist  
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## Simla Sivanandan

Senior Manager,  
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## Oumayma El Hajjam

IT Project Manager  
**Engie**

# Current BI Governance Challenges, offering and metrics



**Anouk Gorris**

Senior Product Manager  
**Collibra**

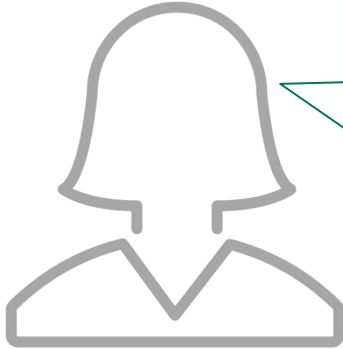
# It's not uncommon to hear this.....

I can't understand this report!

Who do I call for help with this?

How are we calculating this KPI mentioned in the report?

Why did we even create this report?



Did someone look at it to verify?



Who approved this?!



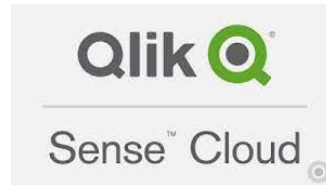
Is this using the correct data?

# Current Collibra offering (as of October 2023)

## Supported BI integrations:



## On the Product Roadmap (GA 2024):



**Poll: which BI integrations do you use on a regular basis?**



# Metrics



# active lineage customers

482



# of scanners

30+



Most popular integration

174

173



% Data Marketplace BI filters

40

\* This data is from Q3 2023

# Feature Focus

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## Stitching: the bridge between Catalog and Lineage

# What is Stitching?

Value for Technical users:  
Create a full end-to-end lineage

- To be compliant
- To check the quality of the data
- To do migrations
- To reduce costs

From the technical lineage perspective:



# What is Stitching?

Value for Business users:  
Bring technical lineage in Catalog

- To do trusted business reporting
- To view business lineage
- To review the quality and sensitivity of your data

Connectivity-Edge-Integration > MS SQL Server Connection > Consumption > dbo

## CustomerKey

Column **Implemented** 0 0 100%

< SYS Microsoft\_SQL\_by\_Edge > Consumption > dbo > CustomerSalesReporting > CustomerKey

NO VALUES HAVE BEEN GIVEN YET.

- Summary
- Details**
- Data Profiling
- Diagram
- Pictures
- Technical Lineage
- Quality
- Responsibilities
- References
- History
- Files

**represented by Business Asset**  
No data available

**sources Data Element**

MS SQL Server Connection > Refined > dbo

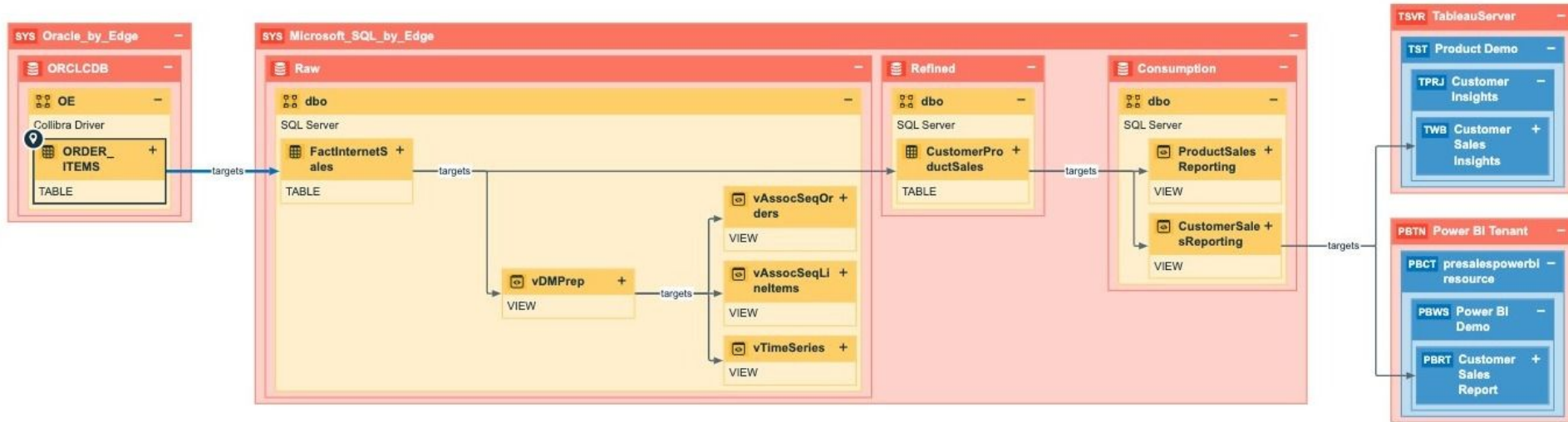
**CustomerKey**

**targets Data Element**

Tableau Catalog

**TDA Customer Key**

# What is Stitching?



# How do you Stitch?

Collibra Data Lineage provides automatic stitching for all sources except Looker.

We stitch based on full names so when the full name doesn't match, stitching is missing.

## External database

## BI data model

## BI report

MODEL.PRODUCT CATEGORY [ADVENTUREWORKS::database]
PRODUCT CATEGORY ALTERNATE ID
PRODUCT CATEGORY ID
PRODUCT CATEGORY NAME
MEASURESID

Product Category [collibra3.onmicrosoft.com::Power BI]
Product Category Alternate Id
Product Category Id
Product Category Name
Measuresid

AAS-quick summary [collibra3.onmicrosoft.com::Power BI]
*

AAS_NOV_7 [collibra3.onmicrosoft.com::Power BI]
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[App] AAS-quick summary [collibra3.onmicrosoft.com::Power BI]
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[App] AAS_NOV_7 [collibra3.onmicrosoft.com::Power BI]
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# How do you Stitch?



# Stitching resources

## Learn more



Product resources:

- [For Business Users](#)
- [For Collibra Admins](#)



[Blog Article](#)



University course: Will be available soon  
(please check out the Collibra Monthly Deck)





# Drive value with Trusted Business Reports



**Simla Sivanandan**

Senior Manager,  
Data Intelligence  
**Collibra**

# Reporting is a struggle



## Locating and trusting the data

Business users have trouble knowing where to find data that they need, and knowing whether or not they can trust that data to drive efficient business decisions



## Authorizing the data

Even after finding data or the report, it is natural have follow up questions. Not knowing who to reach out to with those questions is another bottleneck in analytics



## Inconsistency in definitions

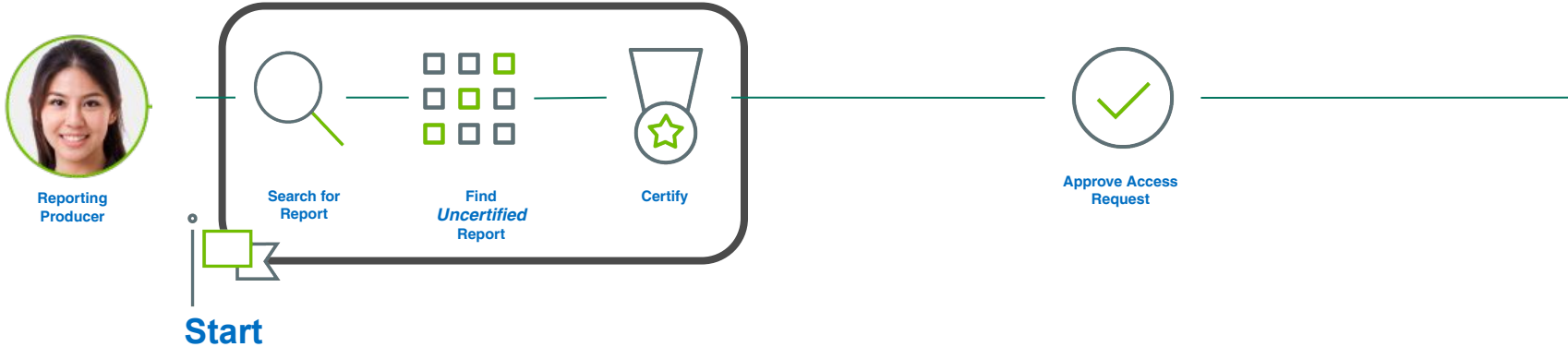
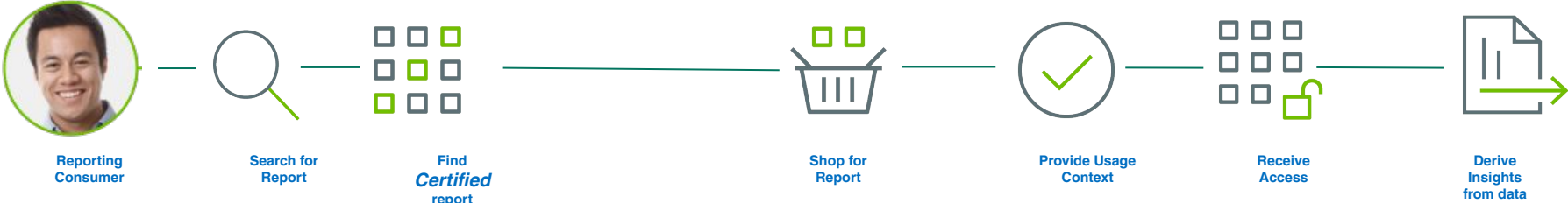
Business terminology can be confusing — even common terms have multiple definitions. Companies need to be able to access a single source of truth for business terminology



## Lack of single source of truth

Time wasted reconciling different reports and metrics  
Lack of understanding of attributes in data products mitigates usefulness 25% less productivity

# The user journey to better analytics



# Our Approach



# Certify and Share Reports

Poll: Have you established certification criteria?

This Report is currently at certification level: **Bronze** (see criteria below).

At minimum, bronze level requirements have to be met in order to proceed.

As the Technical Steward, please

- Review the information captured
- Use the 'Refresh' button to verify certification status
- Use on 'Proceed' to present this for Owner's approval

- **Bronze**

- Technical Steward and Owner identified
- Description is captured (min 100 chars)
- URL is captured
- Data Source is captured
- Report attributes are captured

**Silver** *(In addition to Bronze level requirements)*

- Sensitivity of the data is captured
- Metrics tracked by the report is captured

- **Gold** *(In addition to Silver level requirements)*

- Policies that govern the report are captured
- Business Dimension is captured

Refresh

Proceed

# Reporting is a struggle



## Locating and trusting the data

With 95% of Data Sets Certified Bronze or better, our analysts are locating data faster and demanding certification of datasets



## Authorizing the data

Consumers are starting to engage directly with Producers driving a sense of shared responsibility



## Inconsistency in definitions

We have hit 100% certification rate on our tier 1 Measures and KPIs and created working groups to iron out some of the cross functional ones



## Lack of single source of truth

Clearer understanding of attributes in data reports have raised more meaningful questions and deeper engagement

# What's next?

## Building Data Habits

- At *all* levels, in *all* roles
- Certifications should be the *expectation*
- Going to Collibra for answers should be the *first* instinct

## Get started here

[Packaged Solution for Trusted Business Reporting](#)

# Customer Story: Successful Implementation



**Oumayma El Hajjam**

IT Project Manager  
**Engie**

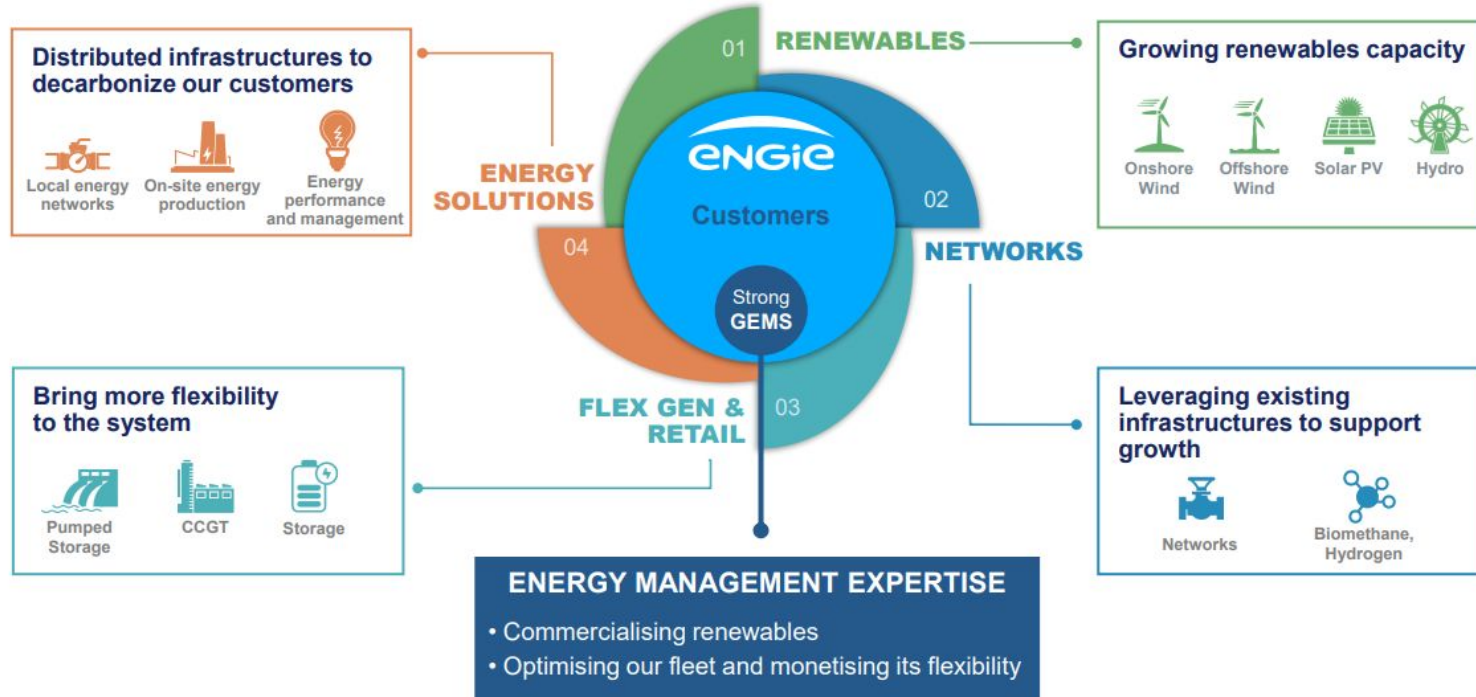




# ENGIE Introduction



ENGIE is a global reference in low-carbon energy and services.



# Engie: Key figures

## IN 2022:

- 96,400 employees
- €93.9 billion revenue
- EBIT of €9.0bn
- 3.9GW installed renewables capacity added
- €5.5 billion growth Capex
- 492 biomethane production units connected to ENGIE's networks in France
- Further progress on coal exit, coal represents 2.6% of centralised generation capacity

## EBIT WORLDWIDE



## OUR BUSINESSES:

- RENEWABLES
- NETWORKS
- ENERGY SOLUTIONS

- FLEX GEN & RETAIL<sup>(3)</sup>
- NUCLEAR

- OTHERS (including GLOBAL ENERGY MANAGEMENT & SALES)

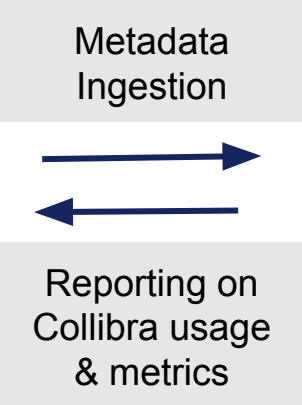
# DataViz & Data Intelligence @ Engie

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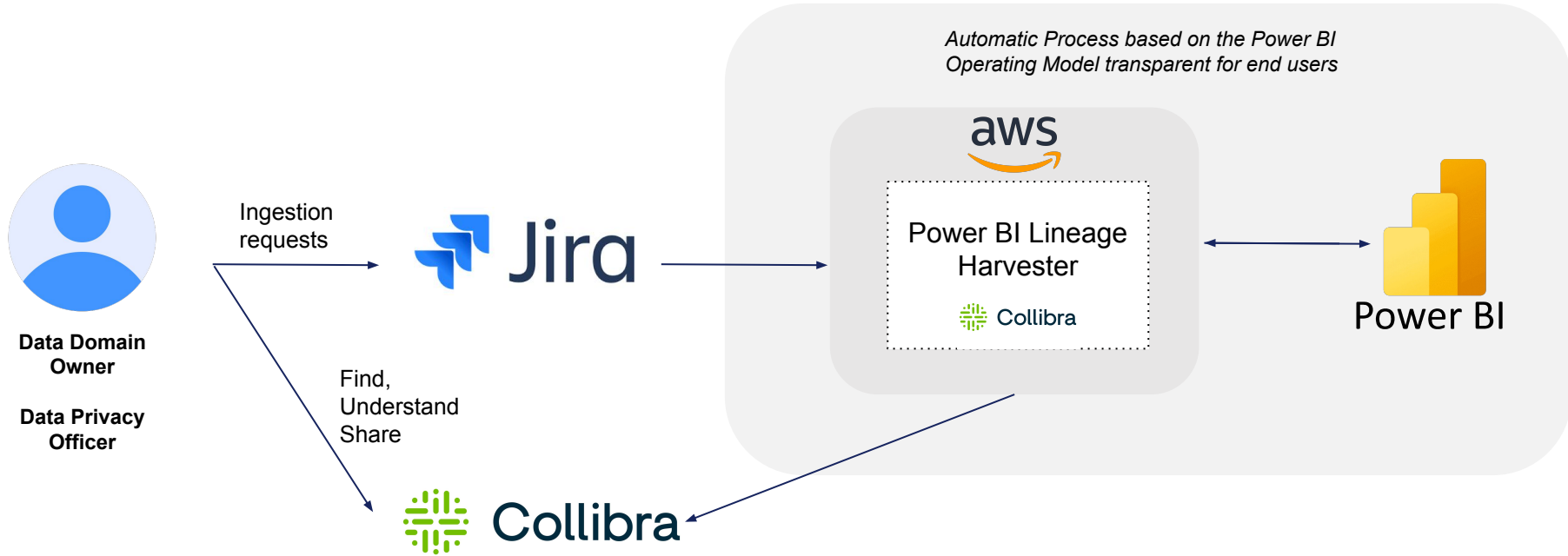
Group Data Visualization Tool



Group Data Intelligence Tool



# Collibra - Power BI: Process



**April 2022: Project Study Launch (including security assessment)**  
**February 2023: Roll-out**

# Collibra - Power BI: Key figures

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7 entities  
worldwide  
using the  
connection



+100 Power BI  
workspaces  
ingested



+1700 Power BI  
Report  
ingested

**Next step :** Use the certification path workflow to improve Report Trust

# Business Value / ROI

## Multiple Use Cases

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### Finder

- Shop for Data Experience:
- One single place to access reports

**Business  
Operational  
Excellence**



### Understanding

- Report lineage allows better understanding of data workflows

**Data  
knowledge**



### Audit

- Duplicate reports
- Obsolete reports
- Cost efficiency

**Cost  
efficiency**



### Impact Analysis

- KPI Calculation rule change
- Sources change

**Streamline  
Data  
Processes**



### Sharing

- Improved report documentation sharing (Collibra everywhere browser extension)

**Enhance  
Collaboration**

# Q & A

# Let's wrap with a few adoption tips



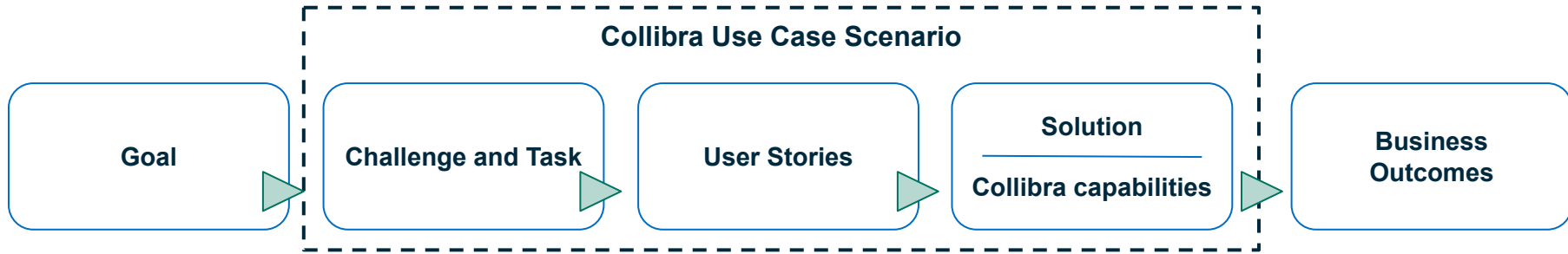
**Dmytro Lugovyi**

Senior Customer Success  
Technologist  
**Collibra**



# Focus on the value

**Use case** is a grouping of one or more scenarios (**user stories**) for how a **data solution** helps achieve a **goal** with the desired **business outcomes** by resolving specific **data challenges**.



What is the main goal or driver?

**Why do anything?** Why now? Why do you want to unlock the value of your data? Why is this strategically important to your organization?

*Can be focused on data or business, IT, legal etc.*

What is the data challenge or task?

**What needs to be done?** How the current way of working with data should be changed? What data problem or task we are addressing?

*Should be focused on data*

What are the users challenges?

**What users should be able to do** after use case implementation? Are there different types of users with needs that should be addressed differently?

How the solution looks like?

**Which Collibra capabilities will be required** so users will be able to do their job? Are there any specific configuration requirements?

What is the expected outcome?

**What outcomes will be realised?** How will you define success / measure progress? What will happen if we don't implement solution?

# Trusted Business Reporting

*Goal: Centralize, govern and certify key BI reports and metrics to make trusted business decisions.*

## Challenge and Task

- The absence of a centralized report catalog with its characteristics, data sources, ownership, reducing trust in the reporting
- The absence of a repository with metrics and KPIs and the lack of transparency on how they are being calculated increase risks of misunderstanding and misuse
- Lack of data ownership, stewardship, and accountability for the reports, KPIs and data assets
- Absence of data lineage illustrating how data flows from the data sources to the report and its attributes
- Lack of the understanding of the dependencies between reports, KPIs, terms, and data assets
- Lack of ability to automate governance processes for the reports and its attributes throughout their lifecycle

## User stories

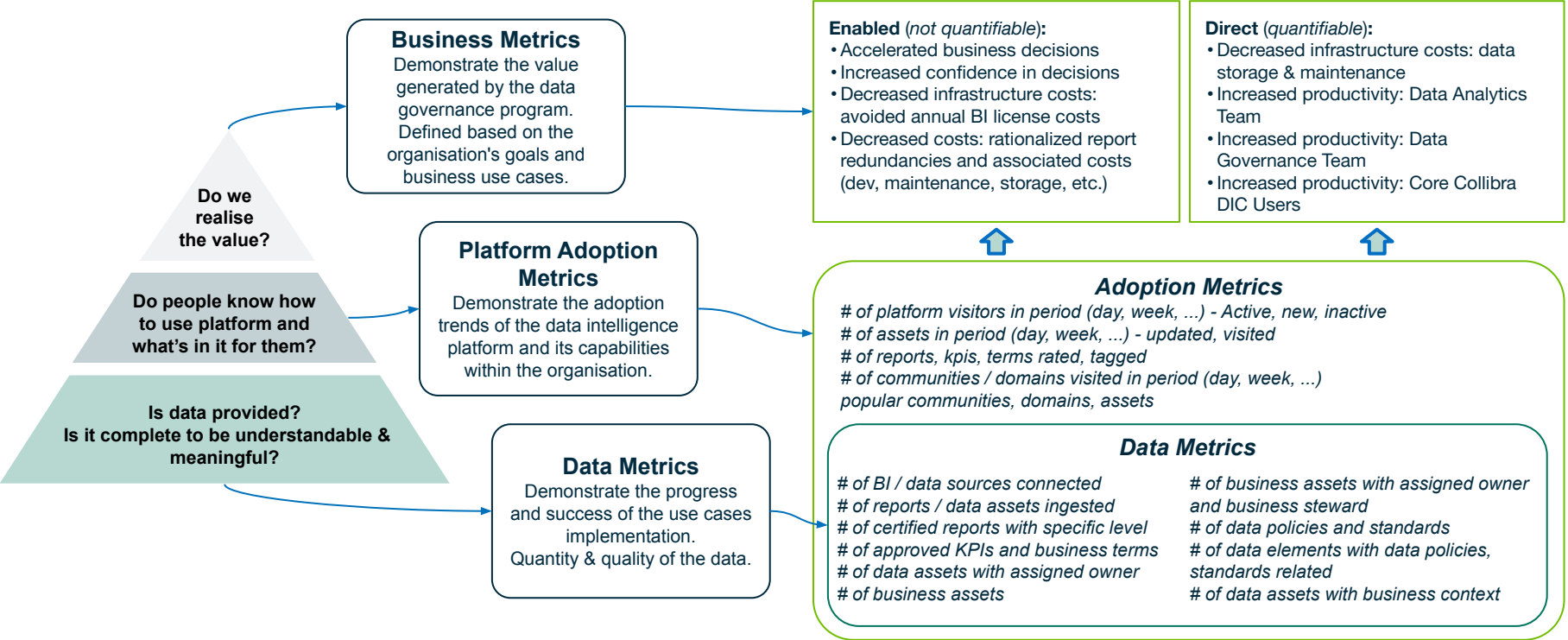
- As a **Data Steward**, I need to package data and configure platform visual components such as user-friendly views, dashboards, traceability diagrams, etc. so users will be able to find and understand reports easier
- As a **Data Steward**, I need to maintain business terms, reports, and KPIs key attributes such as definitions, descriptions, calculation formulas, etc. ensuring consistency and providing data visibility to users.
- As a **Data Steward**, I need to efficiently facilitate and coordinate data governance and stewardship activities related to the reports and their elements, including report review, certification and usage access
- As an **Analyst**, I need to be able to request certification for specific BI reports and metrics, ensuring that they meet quality and accuracy standards for informed decision-making
- As an **Analyst**, I need to understand the business context related to the report, what each of the report attribute means and how its being calculated, and also see the history of its changes
- As an **Analyst**, I need to see report certification status as well as full data lineage with information about report data origin and transformations so that I can quickly validate if report is accurate and I can use it
- As an **Analyst**, I need an understanding of the ownership model for the report and related data so as to be able to reach out to the right people and collaborate with them around the report usage and certification

## Solution Collibra capabilities

- Catalog of reports with their characteristics and related attributes, workbooks, worksheets, views, etc.
- Repository of the key KPIs and metrics with their description, calculation formulas and relations to the report attributes
- Clearly defined and configured roles and responsibilities to drive accountability for the reports, its attributes and related assets
- The end-to-end data lineage shows how the data flows from the primary data source to the report with all transformations over the flow
- Traceability diagrams that allow understand the connections and dependencies between reports, KPIs, terms, and data assets
- Configured workflows that automate processes of the report governance through their lifecycle (propose new report, review and approve assets, certify the report, etc.)

# Measure business value through platform adoption

The intended business value can be generated only in case of good platform adoption and high quality data.



# Use Case: Streamline trusted business reporting

## Implementation path

Step	Activities
<b>1. Prioritize</b> Identify the stakeholders, confirm the need for the use case, set the expectations, and agree on the manageable scope that can be delivered in a time-bound manner.	<ul style="list-style-type: none"><li>- Identify first domains, reports, and sources with the highest impact and lowest difficulty</li><li>- Define criteria for different levels of report certification.</li></ul>
<b>2. Connect</b> Prepare the environment, install the necessary software, establish the connection between data sources and Collibra, and get insights about the existing data, its quality, and data lineage.	<ul style="list-style-type: none"><li>- Ingest metadata from your reporting platform (e.g. Tableau) and the data source (e.g. Snowflake, SQL Server)</li></ul>
<b>3. Configure</b> Design and configure Collibra operating model components according to align with the specific data ownership/stewardship models	<ul style="list-style-type: none"><li>- Create communities and domains for the business assets (business terms, KPIs, etc.)</li><li>- Define and configure roles and responsibilities</li></ul>
<b>4. Curate</b> Bring business context, define guardrails and guidance for data usage, and establish controlled processes of data production and consumption.	<ul style="list-style-type: none"><li>- Import business terms, KPIs, and metrics with their description, calculation formulas, and relations to the report attributes</li><li>- Design and configure report certification processes with levels and clear criteria</li><li>- Create a workflow that will allow users to provide feedback or notify about data issues</li></ul>
<b>5. Adapt</b> Tailor execution and monitoring platform components to the user's needs and expectations ensuring execution of the defined user stories.	<ul style="list-style-type: none"><li>- Create traceability diagrams to aid report owners and stewards in understanding and certifying reports</li><li>- Design the dashboard to provide easy access to the report catalog and its processes</li><li>- Configure search filters and views to help users find, understand, and collaborate around reports</li></ul>
<b>6. Enable</b> Make sure everyone is aware of the implemented use case and expected benefits/outcomes, create and implement the comprehensive adoption plan.	<ul style="list-style-type: none"><li>- Roll out the use case widely communication about how users can use the report catalog to find the report they can trust</li><li>- Create and share run books and bite-size videos explaining how to search and understand the assets in the report catalog</li><li>- Enable data steward on how to analyze and certify reports</li><li>- Encourage users to contribute to the report catalog via social features</li></ul>
<b>7. Monitor</b> Control the progress and measure the success of the implemented use case as well as the generation of the anticipated business value.	<ul style="list-style-type: none"><li>- Monitor data metrics to control the quality of your reports, their amount, and certification status</li><li>- Monitor adoption metrics to see control usage of the report catalog and adoption of the use case</li><li>- Gather the feedback and insights to make iterative improvements to functionality and user experience</li><li>- Share the progress with stakeholders and leadership</li></ul>

# Data Citizens Circles: How to measure business value with Collibra?

Save the Date: January 18th 8 AM PT / 11 AM ET / 5 PM CET



**Dmytro Lugovyi**

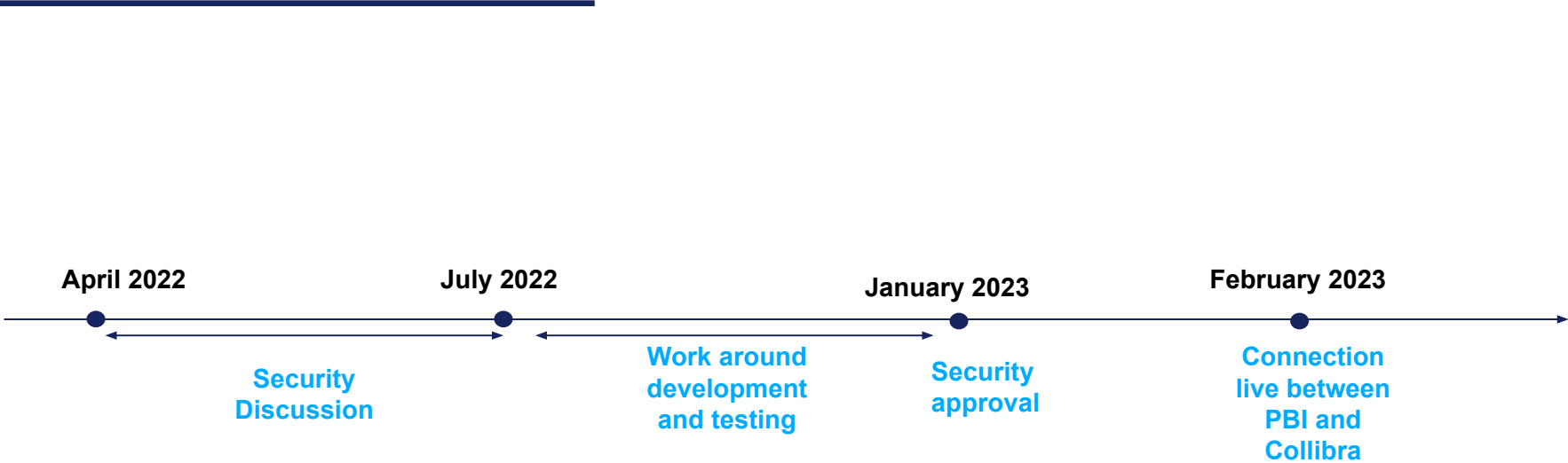
Senior Customer Success  
Technologist  
**Collibra**

# Wrap-up

- Thank you again for your participation!
- Your feedback is important to us
- Continue the collaboration on the [Data Citizens Community](#)

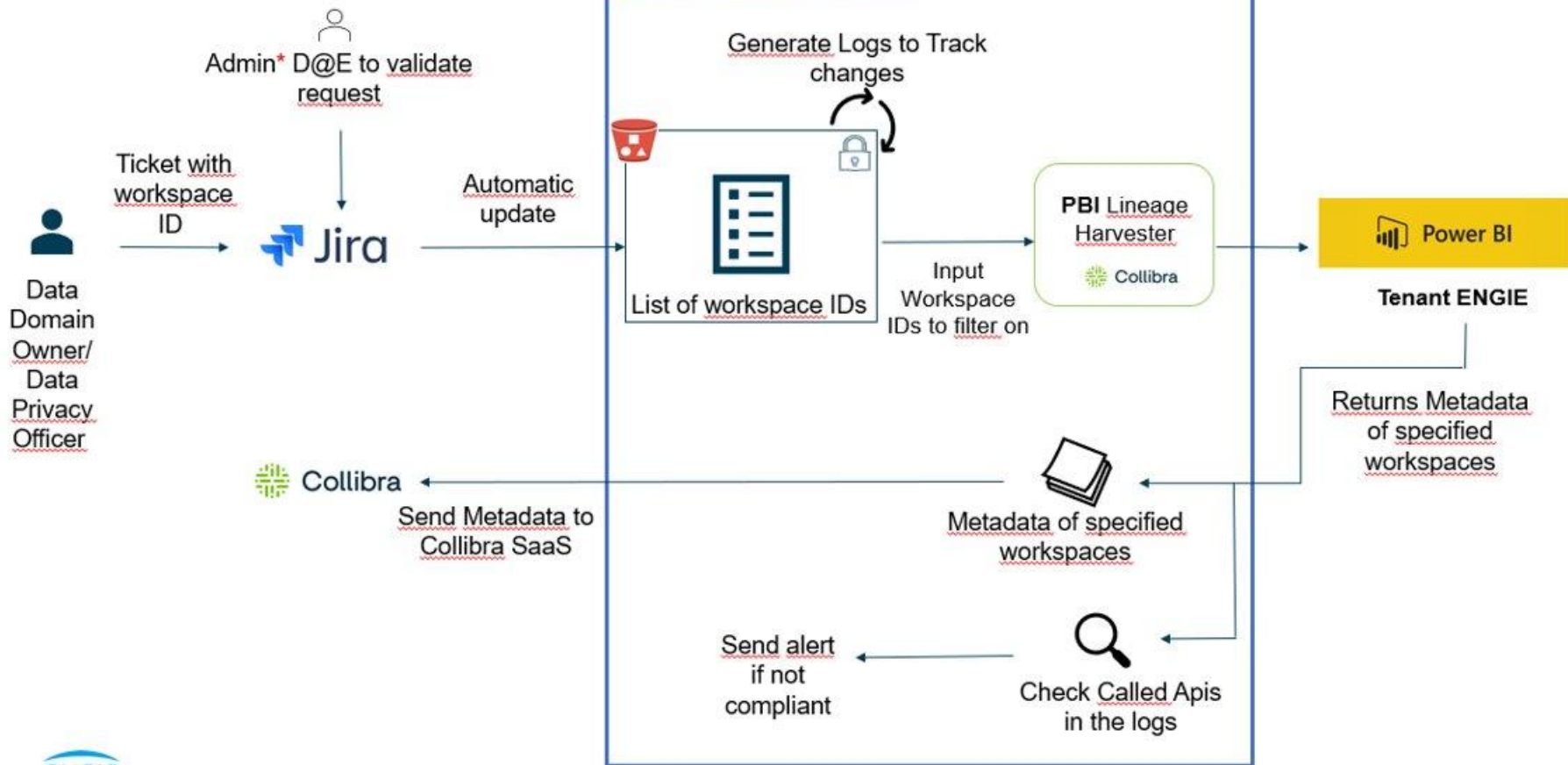
# Thank you

# Overview of our PBI x Collibra Journey





# PBI Process description



**\*Charte Admin to sign**