

# Master Data Management



## Online Education • Certification • Enterprise Solutions

- MDM Fundamentals: Architecture and Implementation
- Data Parsing, Matching & De-duplication
- Data Governance Fundamentals
- Metadata Management Fundamentals
- Data Quality Assessment
- Ensuring Data Quality in Data Integration
- Data Quality Scorecard
- Data Profiling
- Data Privacy and Protection Fundamentals
- Master Data Management for Data Stewards

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Master Data Management (MDM) is a core component of modern data management. MDM is a critical discipline that focuses on uniformity, accuracy, consistency, semantic integrity of shared reference data across the enterprise. A single, consistent view of master entities—customers, products, accounts, employees, etc.—that span multiple business processes is important to ensure both data quality and process integrity. Customer relationship management (CRM) is difficult without customer data integration, and a 360 view of customers is impossible to achieve without actively managing customer data. Similarly, supply chain management is difficult without integrated and consistent product, supplier, and partner data.

These are but two examples of the reasons that MDM is a critical data management capability. As enterprises strive to become data driven and data use cases expand with the adoption of self-service analytics and data science applications, the role and reach of master data expands rapidly. In the age of digital transformation MDM is no longer a “nice to have” capability. It is an essential competency for business success.

## WHAT PEOPLE ARE SAYING ABOUT ELC



**I found the courses to be very well organized in terms of content and delivery; the exams were challenging and the best thing about this online learning is that you can listen to the content at your own convenient time.**

-- Purvi Ramchandani, CIMP Ex – Data Quality, CIMP Ex – MDM, USA

Full course descriptions begin on page 7.

## **MDM Fundamentals: Architecture and Implementation**

**Instructor: William McKnight**

This 4.5-hour course provides a comprehensive look at the elements of an MDM program and the key success factors for MDM.

## **Data Parsing, Matching, and De-duplication**

**Instructors: Kathy Hunter, William McKnight, Henrik Sørensen**

To take advantage of the worldwide marketplace, businesses need to manage data globally. This reality poses very specialized and unique kinds of problems in data management. In this 4.5-hour course you will learn to identify and avoid the pitfalls of global information.

## **Data Governance Fundamentals**

**Instructors: Maria Villar, Theresa Kushner, Dave Wells**

This 5-hour course provides an overview of the disciplines of governing data, covers the essential components of an enterprise-wide program, and outlines a roadmap to execute a successful data governance program.

## **Metadata Management Fundamentals**

**Instructors: Arkady Maydanchik and Dave Wells**

This 4-hour course is designed to provide the foundational metadata knowledge needed by anyone who has data management roles and responsibilities. It covers metadata basics such as the types and purposes of metadata, and explores core metadata disciplines of modeling, profiling, and cataloging data.

## **Data Quality Assessment**

**Instructor: Arkady Maydanchik**

This 6-hour course gives comprehensive treatment to the process and practical challenges of data quality assessment. It starts with systematic treatment of various data quality rules and proceeds to the results analysis and building aggregated data quality scorecard.

## **Ensuring Data Quality in Data Integration**

**Instructor: Arkady Maydanchik**

Without a comprehensive data quality monitoring program bad data spread like viruses through countless real-time and batch interfaces. This 5-hour course discusses various practices that can be put in place to maintain high data quality through data integration.

## **Data Quality Scorecard**

**Instructor: Arkady Maydanchik**

Data quality scorecards have become very popular and many organizations are starting to build them. This online training course gives comprehensive treatment to the processes and practical challenges of data quality scorecarding.

## **Data Profiling**

**Instructor: Olga Maydanchik**

Data profiling is the process of analyzing actual data and understanding its true structure and meaning. It is one of the most common and important activities in information management. This 5-hour course teaches all practical skills necessary to succeed in a data profiling initiative.

## **Data Privacy and Protection Fundamentals**

**Instructor: Evan Levy**

The development of laws around the world focused on data protection, privacy, and responsibility has created a new set of challenges in the world of data usage and business analytics. In this 5-hour course, Evan Levy discusses the details of data privacy and protection and reviews the activities that go into supporting a data privacy and protection initiative.

## **Master Data Management for Data Stewards**

**Instructor: William McKnight & Kathy Hunter**

This 4-hour, 45-min training course provides an overview of the field of master data management with the goal of building strong fundamental knowledge.

## CERTIFICATION PROGRAM



### CIMP: Demonstrate Mastery. Achieve Success.

Certification is an important tool for job seekers and for employers seeking to hire the most qualified people. eLearningCurve offers a robust certification program, Certified Information Management Professional (CIMP) that builds upon education to certify knowledge and understanding of information management.

The CIMP Master Data Management designation will make a clear statement that you have learned from the industry leaders and have demonstrated thorough understanding of master data management by passing several challenging exams.

For the true experts and standard bearers in the industry we offer the second level of CIMP certification - CIMP Ex. To earn the CIMP Ex designation you must demonstrate a combination of great Expertise, Experience, and Excellence.

#### What Sets CIMP Apart?

**Rigorous exam system:** We go beyond the basics. Rather than testing for knowledge that any industry professional should know, CIMP exams test an in-depth knowledge, comprehensive understanding, and ability to apply various concepts to a problem. You can be proud of your achievement of the CIMP designation, and hiring managers can be sure they are getting a highly knowledgeable employee.

**Education to support certification:** We believe that the best way to ensure success is to combine meaningful industry experience with thorough academic study. To that end, CIMP exams are aligned with our courses, developed and taught by top industry educators and professionals.

**Designed with busy, working professionals in mind:** No time-consuming or costly travel is required to complete coursework or to take your CIMP examinations. All courses and exams are available online. All that's required of candidates is an internet connection and the desire to demonstrate mastery of master data management topics and achieve success.

#### How Do I Enroll?

The most convenient and cost-efficient method to enroll in the CIMP program is with one of our Education Packages. Each package includes all courses and exams necessary to earn CIMP or CIMP Ex. Alternatively you can enroll in courses one at a time.

## ENTERPRISE SOLUTIONS



**Today more than ever companies are watching expenses and looking for ways to streamline processes, make training convenient, and create a consistent, scalable learning environment.**

Today more than ever companies are watching expenses and looking for ways to streamline processes, make training convenient, and create a consistent learning environment.

eLearningCurve Enterprise is a flexible, convenient, and cost-effective way to train your employees and ensure that all team members have access to information management training they need when they need it. Whether your team or department work in the same office, or are on the other side of the world from each other, you can train them on time and on budget with eLearningCurve Enterprise.

### **Why eLearningCurve Enterprise?**

- Comprehensive educational solution from a single provider
- Employees can take the courses they need when they need them
- Ensure all team members are trained to the same high standard
- Train employees no matter what their geographic location
- Employ a fully scalable education solution
- Minimize disruption to the business
- Maximize your employee training ROI
- Achieve 100% information comprehension
- Get "live" time with our instructors
- Stretch your training budget
- Get solutions for your specific needs

### **When you become an eLearningCurve Enterprise Customer**

We'll work with you to develop educational programs for different roles, positions, teams, departments, and manage and track enrollment of all students in online classes and CIMP exams. We'll track and report educational progress for each student and work with you to meet any specific educational needs.

## ELEARNINGCURVE ENTERPRISE BENEFITS

**PARTNERSHIP:** *Comprehensive educational solution from a single provider.* We'll be your educational "partner-for-life" providing employees with continuous information management education they need over the course of their careers.

**FLEXIBILITY:** *Employees can take the courses they need when they need them.* Our flexible program allows employees to take the courses they need when they need them to best suit their role, projects, backgrounds or interests.

**CONSISTENCY:** *Ensure all team members are trained to the same high standard.* Train your existing team, and set up courses for new hires and transfers. Consider CIMP exams to verify that your employees utilize the same methodology, techniques, and terminology.

**SCALABILITY:** *Select an Education Partner who truly understands scalability.* Roll out to a few employees, or your entire organization. Our solution can quickly and effortlessly accommodate groups of all sizes, even if they are geographically dispersed.

**BREADTH:** *Acquire comprehensive education and certification.* We offer a full information management education. We have you covered with a comprehensive set of courses, exams, and certifications designed to impart knowledge, test understanding, and validate learning.

**LOCATION:** *Train employees no matter what their geographic location.* Overcome geographical barriers to training. You can train your entire team whether they are in the same office, or on the opposite sides of the world. Everyone can access our online courses from any place at any time.

**LOGISTICS:** *Minimize disruption to the business.* Our online format allows employees to study from their office or home, allocate full training days, or study an hour a day during lunch breaks.

**ROI:** *Maximize your employee training ROI.* No need to worry about paying for flights, hotels and other travel expenses. 100% of what you spend goes towards learning, thus achieving top quality education at a fraction of the cost of in-person training.

**RESULTS:** *Achieve 100% information comprehension.* Learn from top industry experts in information management topics. Study at your own pace, listen to the material many times, and test your knowledge through CIMP certification exams.

**SAVINGS:** *Stretch your training budget.* We offer various pricing options including volume discounts, pay-as-you-go model with increasing discounts, and other alternatives.

**"LIVE" INTERACTION:** *Spend time with our instructors.* Organize question and answer meetings (via Webinar) with course instructors for groups of students who complete online courses.

**INFORMATION MANAGEMENT 101 Mini-classes.** As a benefit to our enterprise customers we offer a certain number of complimentary licenses for our 101 mini-classes.

**CUSTOMER COURSEWARE:** *Get solutions for your specific needs.* Tell us which courses your organization needs the most. We'll work with top instructors in the industry to meet your needs in the most expedient manner.



# COURSE DESCRIPTIONS

## MDM Fundamentals: Architecture and Implementation

**Instructor: William McKnight**

**Duration: 4 hours and 30 minutes**

Proliferation of heterogeneous systems creates a pressing need for data sharing and data consistency. When many different systems collect data about master entities - customers, products, suppliers, employees, accounts, etc. - you can be certain that you'll find inconsistencies, conflicts, and confusion. At best, conflict and confusion leads to waste and inefficiency in business process. More severe consequences include damaged credibility and reputation when errors and inconsistencies are visible to customers, suppliers, and employees. Today's complex business and information systems must synchronize master data. That is the role and purpose of Master Data Management (MDM) systems.

MDM is not a casual endeavor. It is a complex data management challenge that requires a formal and well-managed program. The unique challenges of an MDM program are often not apparent even to seasoned data management professionals. The complexities of managing identities and resolving conflicts among disparate data sources make MDM an ambitious undertaking that must address business, architectural, people, process, project, and technology dimensions to succeed. This course provides a comprehensive look at the elements of an MDM program and the key success factors for MDM.

### You will learn

- The what and why of Master Data Management (MDM)
- A variety of architectural approaches to MDM and how to determine which is the best fit for your MDM program
- The human dimension of MDM including roles and responsibilities of sponsors, managers, analysts, architects, designers, and developers
- The state of MDM technologies along with techniques and guidelines for tool selection
- The process dimension of MDM including impacts upon business processes and information management processes
- The project perspective of MDM including organizing and executing the activities of planning, requirements analysis, design, development, testing, data migration, and implementation.

### This course is geared towards

- MDM Program and Project Managers
- MDM Analysts, Designers, and Developers
- Business Data Owners, Data Stewards, and Data Consumers
- Data Architects
- Information Systems Project Managers
- Data Integration Program and Project Managers
- Data Stewards, Data Governance Professionals, and Data Quality Practitioners

## Course Outline

### About the Course (7 min)

#### Introduction (54 min)

- MDM Overview
- MDM Justification and Outcomes
- Master Data Management for Customers

#### MDM Architecture (90 min)

- Architecture Approaches
- Conforming Dimensions for the Enterprise
- Data Quality
- Syndicated Data
- Additional Considerations

#### MDM Tool Selection (48 min)

- Process Considerations
- Proof of Concept and Final Selection

#### MDM Project Execution (77 min)

- MDM Project Management
- MDM Project Roles and Responsibilities
- Organizing and Planning for MDM Success
- Case Study

# Data Parsing, Matching and De-duplication

**Instructors: Kathy Hunter, William McKnight, Henrik Sørensen**

**Duration: 4 hours, 20 minutes**

Data parsing, standardization, matching, and de-duplication are the cornerstones of successful Master Data Management (MDM). They are also critical parts of successful data quality programs, and are key steps in building data warehouses as well as any data integration and consolidation initiatives. You could say that today few organizations can function effectively without implementing data parsing and matching processes often in many data domains.

This need is further magnified if your company has gone global and plans to create databases that combine name- and address-related data from all corners of the world. Managing global information effectively takes specialist knowledge and the ability to show consideration for the differences that exist throughout the world. Worldwide there are more than 10,000 languages, 130 address formats, 36 personal and hundreds of business name formats. All of these variables are further complicated by the need to respect national and regional cultures. Failure to consider formats, styles, and cultures has huge impact on quality of data and quality of business relationships.

This online training course is aimed at data quality and master data management (MDM) professionals as well as those responsible to work with global information. The field is broad and the details are many. The purpose of this course is to provide a broad and in-depth review of data parsing, standardization, matching, and de-duplication techniques, as well as extensive overview of specific problems and solutions when dealing with global data.

## You will learn:

- Data parsing, standardization, matching, and de-duplication techniques
- How to find and use external reference data
- How data parsing and matching contribute to improving data quality, MDM, and data warehousing
- Which data domains, entities and data elements may benefit from data parsing and matching
- Challenges of global data and ways to overcome these challenges

## This course is geared towards:

- Master data management professionals
- Data quality professionals
- Information architects
- Developers of data warehousing systems
- Business professionals who work with global data

## Course Outline

### About the Course (12 min)

### Introduction (17 min)

### Implementation Fundamentals (70 min)

- Parsing and Standardization
- Introduction to Data Matching
- Data Matching Techniques
- Data Matching Destinations
- Evaluating Data Matching Tools

### External Reference Data (45 min)

- External Data Sources
- Syndicated Customer Data
- Syndicated Product Data
- Using the Web

### Challenges of Global Data (58 min)

- Introduction to Global Information
- Global Data: What You Need to Know
- Variations by Country and Region
- Cultural and Legal Impacts
- Characters and Diacritics

### Overcoming the Challenges of Global Data (59 min)

- Data Profiling
- Consistent Data Structures
- Preparing Global Data for Effective Use



# Data Governance Fundamentals

**Instructors: Theresa Kushner, Maria C. Villar and David Wells**

**Duration: 5 hours**

Data governance is an emerging, cross-functional management program that treats data as an enterprise asset. It includes the collection of policies, standards, processes, people, and technology essential to managing critical data to a set of goals.

Data governance also includes the oversight necessary to ensure compliance and to manage risk. A data governance program can be tailored to match an organization's culture, information maturity, priorities, and sponsorship.

This online training course provides an overview of the disciplines of governing data, covers the essential components of an enterprise-wide program, and outlines a roadmap to execute a successful data governance program. In addition to the extensive overview, the course makes data governance real and tangible by illustrating the concepts, principles, and practices using a case study of data governance in a customer intelligence initiative.

## You will learn:

- What data should be governed
- Why data governance is important
- Basic concepts, principles, and practices of a data governance program
- Where and how to start a data governance program
- People and tools that enable a data governance program
- Techniques to measure success of a data governance program
- Governance of big data and cloud applications

## This course is geared towards:

- Individuals who implement a data governance program
- Individuals who participate in a data governance program
- Business data stewards
- Information professionals who want to learn about this emerging area

## Course Outline

### About the Course (7 min)

#### Introduction to Data Governance (33 min)

- Data Governance 101
- Why Govern Data?
- What Data Should Be Governed?
- Business Drivers for Data Governance

#### Implementation Fundamentals (78 min)

- Selecting Data and Setting Goals
- Standards, Policies, Processes, People, and Technology
- Managing and Measuring Data Governance

### Case Study (63 min)

#### Data Governance of Emerging Solutions (65 min)

- Big Data
- Cloud Applications

#### Modernizing Data Governance (53 min)

- Overview
- The Data Quake: From Stable to Volatile
- New Data Governance Challenges
- Curating and Cataloging Data
- Rethinking Data Governance Practices
- Technologies and Modern Data Governance
- Module Summary

# Metadata Management Fundamentals

Instructor: David Wells and Arkady Maydanchik

Duration: 4 hours

Deriving value from data depends extensively on understanding the data and sharing knowledge among everyone who works with data. Sharing data knowledge is the core purpose of metadata. Just as you need financial data to manage financial resources, you need metadata to manage data resources. In today's data-driven world, the importance of managing data is certainly on par with that of managing finances.

This online training course is designed to provide the foundational metadata knowledge needed by anyone who has data management roles and responsibilities. It covers metadata basics such as the types and purposes of metadata, and explores core metadata disciplines of data modeling, data profiling, and data cataloging. Metadata roles in data governance, stewardship, security, quality, and analysis are explained.

## You will learn:

- The scope and complexities of metadata management
- The roles of data models as metadata and the basics of data modeling
- The role of data profiling in metadata management and the basics of data profiling methods
- The roles of data catalogs in metadata management and the fundamentals of data curation and data cataloging
- Metadata dependencies of business processes, IT projects, data governance, data quality, business intelligence, self-service data, business analytics, and data science

## This course is geared towards:

- Anyone with data management roles and responsibilities
- Data stewards and data governance practitioners and participants
- Data curators and data catalog administrators
- Data and database analysts and designers
- Data quality professionals and practitioners
- Aspiring data modelers who need to start with the basics
- Anyone with a role in information management who needs to understand data or help others to understand data

## Course Outline

### About the Course (8 min)

### Understanding Data (15 min)

- Views of Data
- Projects Flow
- Describing the Data Meaning
- Describing the Data Constraints
- Describing the Data Relationships
- Describing the Data

### Metadata Management (57 min)

- Metadata
- Metadata Management Processes
- Using Metadata
- Metadata Tools and Technologies

### Data Modeling (24 min)

- Data Modeling Defined
- The Data Modeling Process
- Supplemental Models & Additional E-R Concepts
- Dimensional Data Modeling

### Data Profiling (47 min)

- What is Data Profiling?
- Myth and Reality of Data Profiling
- Profiling Techniques
- Profiling Challenges
- Role of Profiling
- People and Technology

### Data Curation and Cataloging (31 min)

- Data Curation
- Data Cataloging
- Metadata and the Catalog

### Metadata Management for BI and Data Science (49 min)

- The Metadata Muddle
- Data Science and Metadata
- Data Provenance and Data Lineage
- Ontology and Taxonomy

# Data Quality Assessment

**Instructors:** Arkady Maydanchik

**Duration:** 6 hours

More and more companies initiate data quality programs and form data stewardship groups every year. The starting point for any such program must be data quality assessment. Yet in absence of a comprehensive methodology, measuring data quality remains an elusive concept. It proves to be easier to produce hundreds or thousands of data error reports than to make any sense of them.

This online training course gives comprehensive treatment to the process and practical challenges of data quality assessment. It starts with systematic treatment of various data quality rules and proceeds to the results analysis and building aggregated data quality scorecard. Special attention is paid to the architecture and functionality of the data quality metadata warehouse.

## You will learn:

- The what, why, when, and how of data quality assessment
- How to identify and use data quality rules for assessment
- How to ensure completeness of data quality assessment
- How to construct and use a data quality scorecard
- How to collect, manage, maintain, warehouse and use data quality metadata

## This course is geared towards:

- Data quality practitioners
- Data stewards
- IT and business analysts and everyone else involved in data quality management

## Course Outline

### About the Course (9 min)

#### Introduction (53 min)

- Why Assess Data Quality
- Business Value of Data Quality Assessment
- Types of Data Errors
- Data Quality Assessment Approaches
- How Rule-Driven Approach Works
- Project Planning
- Project Steps

#### Data Quality Rules Overview (63 min)

- Attribute Domain Constraints
- Relational Integrity Constraints
- Complex Data Relationships

#### Rules for Historical Data (56 min)

- Historical Data Overview
- Timeline Constraints
- Value Pattern Rules
- Rules for Event Histories
- Rules for State-Dependent Objects

#### Finding Data Errors (76 min)

- Discovering Data Quality Rules
- Implementing Data Quality Rules
- Building Rule Catalog
- Building Error Catalog
- Fine-Tuning Data Quality Rules

#### Aggregate Data Quality Scores (66 min)

- School Report Card Example
- A First Look at DQ Scorecard
- Defining Aggregate Scores
- Score Tabulation

#### Building Data Quality Scorecard (61 min)

- Basic Scorecard Example
- Recurrent Data Quality Assessment
- Database and Enterprise-Wide DQ Scorecard

# Ensuring Data Quality in Data Integration

**Instructor: Arkady Maydanchik**

**Duration: 5 hours**

Corporate data universe consists of numerous databases connected by countless real-time and batch data interfaces. The data continuously move about and change. The databases are endlessly redesigned and upgraded, as are the programs responsible for the data integration. The typical result of these dynamics is that information systems get better, while data quality deteriorates. Without a comprehensive data quality monitoring program bad data spread like viruses.

This online training course discusses various practices that can be put in place to mitigate the problem and maintain high data quality through data integration.

## You will learn:

- The data quality challenges that are inherent in data integration
- The critical role of data quality monitoring in data integration
- Specific techniques to monitor and manage quality for batch data integration
- Use of Statistical Process Control (SPC) methods in monitoring data quality
- The impacts of change on data quality and techniques to address those impacts
- How an enterprise integration hub can be applied to managing data quality

## This course is geared towards:

- Data integration practitioners
- Data quality practitioners
- Data warehousing practitioners
- MDM practitioners
- Others in the trenches involved in design, development, and maintenance of data integration systems

## Course Outline

### About the Course (8 min)

#### Introduction (60 min)

- Data Integration Basics
- Data Quality in Data Federation
- Data Quality in Data Consolidation
- Data Quality in Real-Time Interfaces
- Data Quality in Batch Interfaces
- Beyond Monitoring

#### Data Consolidation and Cleansing (60 min)

- Data Quality in Data Conversion
- Data Cleansing
- Data Quality in Data Consolidation

#### Error Monitors in Batch Interfaces (77 min)

- Monitoring Techniques
- Batch Integrity Rules
- Master Data Integrity Rules
- Dynamic Integrity Rules
- Monitor Management
- Error Correction
- Root Cause Analysis
- Statistical Process Control

#### Change Monitors in Batch Interfaces (95 min)

- Examples
- Change Monitor Defined
- Which Metrics to Monitor
- Implementing the Monitors
- Heuristic Monitors
- Basic Statistical Monitor
- Handling Non-Stationary Data

# Data Quality Scorecard

**Instructor: Olga Maydanchik**

**Duration: 5 hours**

Data quality scorecards have become very popular and many organizations are starting to build them. What they have found is that the path to a meaningful and useful DQ Scorecard is riddled with traps and obstacles.

This online training course gives comprehensive treatment to the processes and practical challenges of data quality scorecarding.

It starts with a few real, live use cases that showcase what a scorecard can do for a company when done right. Systematic treatment of various DQ scorecard challenges is given. Then the course proceeds to the ins and outs of the successful DQ scorecard, from the underlying data model to the effective processes that need to be set up in order to produce the scorecard efficiently. Multiple examples to illustrate every important point are provided in the class.

## You will learn:

- The methodology behind data quality metrics calculations
- The best way to organize data quality related metadata collected during typical data quality projects
- Effective data visualization techniques to depict data quality measurements
- Typical pitfalls that accompany data quality scorecard implementation and how to avoid them
- How to achieve scorecard adoption and usage by the business users

## This course is geared towards:

- Data quality practitioners
- Data stewards and data governance practitioners
- IT analysts, business analysts, and everyone else involved in data quality management
- Developers tasked with DQ Scorecard creation

## Course Outline

### About the Course (3 min)

### Case Studies (46 min)

- What is Data Quality Assessment?
- What is a Data Quality Scorecard?
- Data Quality Scorecard Case Study 1: Improving the Efficiency of the Risk-Weighted Asset (RWA) Calculation Process (Financial Company)
- Data Quality Scorecard Case Study 2: Data Quality Impact on Catastrophe Risk Modeling (Insurance Company)

### Data Quality Score Calculation Methods (37 min)

- Averages Method for Score Cards
- Record Level Score Calculations
- Subject Level Score Calculations
- Score Types Comparisons
- Score Decomposition by Business Dimensions
- Business Dimensions Versus Subjects

### Data Modeling Considerations Part 1 (55 min)

- Why DQMDW?
- DQMDW Components
- Case Study DQMDW for Property Insurance Company
- DQMDW: Critical Data Elements Catalog
- DQMDW: Rule Catalog

### Data Modeling Considerations Part 2 (68 min)

- DQMDW: Subject Master and Business Dimensions Master
- DQMDW: Error Catalog
- Error Details - Storage Options
- Rule Error Output - Advanced Examples
- DQMDW: Score Catalog
- DataMarts for DQ Visualization

### Building A Data Quality Scorecard Process (61 min)

- Process Overview
- Step 1 Define The DQ Assessment and DQ Scorecard Scope
- Step 2: Populate The Staging Area
- Step 3: Prepare The Data
- Step 3A: Add Record ID Step
- Step 3B: Fill Dataset AsOfDate
- Step 3C: Create/Update Subject Master List
- Step 3D: Create/Update Business Dimension Master Lists
- Step 4: Perform Data Profiling
- Step 5: Create and Code Data Quality Rules
- Step 6: Run DQ Rules
- Step 7: Move Rule Execution Results into DQMDW
- Step 8: Calculate Aggregate Scores
- Step 9: Examine DQ Scores and DQ Rule Results
- Step 10: Fine-Tune Data Quality Rules

### Data Quality Scorecard Demo (35 min)

# Data Profiling

**Instructor: Arkady Maydanchik**

**Duration: 5 hours**

Data profiling is the process of analyzing actual data and understanding its true structure and meaning. It is one of the most common and important activities in information management. Data profiling is the first critical step in many major IT initiatives, including implementing a data warehouse, building an MDM hub, populating metadata repository, as well as operational data migration and integration. It is also the key ingredient to successful data quality management.

While proliferation of commercial tools made data profiling accessible for most information management professionals, successful profiling projects remain elusive. This is largely because the tools allow gathering large volumes of information about data, but offer limited means and guidelines for analysis of that information.

In this online training course you will learn all practical skills necessary to succeed in a data profiling initiative.

## You will learn:

- The what, why, when, and how of data profiling
- Various data profiling techniques, from simple column profiling to advanced profiling methods for time-dependent and state-dependent data
- How to efficiently gather data profiles
- How to analyze the data profiling information and ask the right questions about your data
- How to organize data profiling results
- How to perform dynamic data profiling and identify changes in data structure and meaning

## This course is geared towards:

- Data quality practitioners
- MDM practitioners
- Metadata management practitioners
- IT and business analysts involved in data management
- Those responsible for implementation and maintenance of various data management systems

## Course Outline

### About the Course (7 min)

#### Introduction to Data Profiling (44 min)

- What is Data Profiling?
- Myth and Reality of Data Profiling
- Profiling Techniques
- Profiling Challenges
- Role of Profiling
- People and Technology

#### Column Profiling (89 min)

- Introduction
- Basic Counts
- Value Frequency Charts
- Value Distribution Characteristics
- Value Distribution

#### Profiling Time-Dependent Data (58 min)

- Introduction
- Timeline Profiling
- Timestamp Pattern Profiling
- Multi-Dimensional Profiling
- Event Dependency Profiling

#### Profiling State-Transition Models (49 min)

- Introduction
- Data Structures for State-Dependent Data
- Profiling Techniques

#### Other Profiling Techniques (65 min)

- Subject Profiling
- Relational Integrity Profiling
- Attribute Dependency Profiling
- Dynamic Data Profiling



# Data Privacy and Protection Fundamentals

Instructor: Evan Levy

Duration: 5 hours

The business world is undergoing a transition in today's data driven economy. As the value of data has grown, the awareness of protection, privacy, and liability has become top-of-mind. For many years, companies were able to acquire, collect and use customer and other personal information without concern for rules, laws, and liabilities. That's no longer the case.

The frequent occurrence of data misuse and theft has created the need for companies to reexamine their approach to data protection and privacy. Most business people think little about their company's responsibilities in retaining customer data to support business decision making. The development of laws around the world focused on data protection, privacy, and responsibility, has created a new set of challenges in the world of data usage and business analytics. Companies need to be able to manage and track data usage, data location, and customer consent. In this 5-hour course, Evan Levy discusses the details of data privacy and protection and reviews the activities that go into supporting a data privacy and protection initiative.

## You will learn:

- Key concepts of data privacy and protection
- The impact of data privacy on an existing analytics environment
- An approach to integrating data privacy and protection into a data lifecycle
- The phases and activities involved with Data Privacy/Protection Initiative
- The stakeholders and participants of a Data Protection Initiative

## This course is geared towards:

- chief data officers
- compliance and risk officers
- program/project management
- business sponsors
- BI/analytics developers
- data architects
- data management staff

## Course Outline

### About the Course (8 min)

### Business Challenges and Drivers (36 min)

- Overview
- Data Breaches
- Data Protection Neglect
- Data Liability Costs
- What is Data Protection?
- Data Protection Part 1
- The Disparity of Privacy
- Common Privacy and Protection Questions 15

### Privacy Concepts & Terminology (55 min)

- Overview
- What is Personally Identifiable Information (PII)
- Consent
- Traceability, Tracking, and Lineage
- What is Data Portability
- Data Deletion

### Protection Concepts & Terminology (59 min)

- Overview
- Controller
- Processor
- Differences in Responsibilities
- Information (Data) Fiduciary
- Data Applications in a Company...
- Data Protection Concepts Part 1
- Masking
- Data Usage Responsibilities

### Data Privacy and Protection in a Data Lifecycle (52 min)

- Overview
- Challenges to Implementation
- What is a Data Lifecycle?
- The Stages of a Data Lifecycle
- The Stages in a Data Lifecycle
- The Audience for Data Privacy/Protection
- Data Management Support: Data Standards

### Data Privacy in the Real World (78 min)

- The GDPR-EU General Data Protection
- GDPR in the News
- GDPR: What are the Primary Mandates
- Are You Affected by GDPR?
- How GDPR Impacts Non-EU Organizations
- The Challenges of Data Protection
- Core PDP/Privacy Activities
- California Consumer Privacy Act (CCPA) Part 1
- Act to Protect the Privacy of Online Consumer Information
- Security and Privacy of Personal Information (chapter 603A)
- Other Government PDP Initiatives

### Implementation Framework (23 min)

- Core Data Privacy/Data Protection Activities
- A Simple Development Approach
- Aligning Activities with Existing Methods

# Master Data Management for Data Stewards

**Instructor: William McKnight and Kathy Hunter**

**Duration: 4 hours, 45 minutes**

Master Data Management (MDM) is complex and challenging, but it pays great dividends when done well. The complexities of managing identities, managing hierarchies, and resolving conflicts among disparate data sources make MDM an ambitious undertaking. Add to these complexities the multi-faceted nature of MDM - with human, organizational, architectural, and technological implications - and it becomes clear that knowledge is an essential component of MDM success. Since Data Stewards play a critical role in master data management, each steward needs a foundation of concepts, principles, terminology, and methodology of this important information management discipline. This online training course provides an overview of the field of master data management with the goal of building strong fundamental knowledge.

## You will learn:

- What is Master Data and why and how it must be managed
- Styles and architectures used for MDM projects
- Challenges and best practices in MDM, including several real-world case studies
- Fundamentals of data parsing, standardization, matching, and de-duplication
- Challenges of working with global data and ways to overcome these challenges

## This course is geared towards:

- Data stewards
- Business or IT professionals who want to become data stewards
- Business or IT counterparts working with data stewards
- Information management professionals who want to learn about MDM

## Course Outline

### About the Course (7 min)

#### MDM Concepts (54 min)

- MDM Overview
- MDM Justification and Outcome
- Master Data Management for Customer

#### MDM Architecture (38 min)

- Architecture Approaches

#### MDM Projects (51 min)

- MDM Project Management
- MDM Project Roles and Responsibilities
- Organizing and Planning for MDM Success

#### Data Parsing Matching and De-duplication (58 min)

- Introduction
- The Goals
- Historical vs. Ongoing Data
- Parsing and Standardization
- Data Matching
- External Data Referencing

#### The Challenges of Global Data (74 min)

- Global Data Challenges
- Introduction to Global Data Information
- Example of Variations by Country and Region
- Characters and Diacritics
- Cultural Impacts
- Preparing Global Data for Effective Use

## OUR INSTRUCTORS

### Kathy Hunter

Kathy always says she has data in her blood. Joining Harte-Hanks in 2002, she built an information management practice and, with her highly skilled team, was responsible for instituting their highly successful Global Data Management solution set. From information quality and data governance through to providing global data solutions and guidance she attained a reputation for expert knowledge and successful delivery in global information management to her clients. Kathy is known for her pragmatic approach to topics, providing helpful hints and practical examples in order to solve tough problems.

### Theresa Kushner

Theresa Kushner is presently the Vice President of Enterprise Information Management for VMware, Palo Alto. She joined in October 2012 to help the fast growing software company develop a firm data foundation on which to build their future business. Before joining VMware she was the Director of Customer Intelligence within the Strategic Marketing organization of Cisco Systems.

### Evan Levy

Evan has spent his career leading both practitioners and executives in delivering a range of technology solutions, from software product development to industry-focused strategic consulting services to organization leadership sessions. He has led high-profile systems integration projects for Fortune 500 customers in the financial services, retail, telecommunications, health/life sciences, government, and insurance industries. He's also been retained as a strategic advisor to various software vendors in the areas of product planning, and continues to counsel the investment community in applying advanced technologies to key business initiatives.

### William McKnight

William is president of McKnight Consulting Group, which includes service lines of Master Data Management, IT assessment, Big Data, Columnar Databases, Data Warehousing, and Business Intelligence. He functions as Strategist, Lead Enterprise Information Architect, and Program Manager for sites worldwide. Many of his clients have gone public with their success stories. William is a Southwest Entrepreneur of the Year Finalist, a frequent best practices judge, has authored hundreds of articles and white papers and given hundreds of international keynotes and public seminars. His team's implementations from both IT and consultant positions have won Best Practices awards. William is a former Information Technology Vice President of a Fortune 50 company, a former engineer of DB2 at IBM and holds an MBA from Santa Clara University.

## Arkady Maydanchik

For more than 20 years, Arkady Maydanchik has been a recognized leader and innovator in the fields of data quality and information integration. As a practitioner, author and educator he has been involved in some of the most challenging projects industry has seen. These projects were often the result of major corporate mergers and the need to consolidate and integrate databases of enormous variety and complexity. Arkady's client list includes such household names as Dun & Bradstreet, Hewitt Associates, Kimberly Clark, Raytheon, Sprint, Verizon, and Xerox.

## Olga Maydanchik

Olga Maydanchik is an experienced practitioner and educator in the field of Information Management. As a part of Chief Data Offices in Citi, AIG, Deutsche Bank, and Voya Financial Olga was focusing on designing and implementing the enterprise-wide Data Quality, Master Data Management, Metadata Management, and Analytics programs. Olga is a member of the Enterprise Data Management Council and actively participated in the Data Management Capability Assessment Model and Ontology design workstreams.

## Henrik Sørensen

Henrik Liliendahl Sørensen has over 30 years of experience in working with Master Data Management and Data Quality and is a charter member of the International Association of Information and Data Quality. Currently Henrik works with Master Data Management at Tata Consulting Services and as Practice Manager at Omikron Data Quality besides writing on a well trafficked blog about data quality, master data management and the art of data matching. Henrik is the founder of the Data Matching and the Multi-Domain MDM groups on LinkedIn.

## Maria C. Villar

Maria C. Villar is a leader, consultant and writer in the field of enterprise information management, IT management and software development. She has held senior executive positions in both the technology and financial sector. Maria holds a bachelor in Computer Science and graduate degrees in Management Information Systems and Business Administration. Maria has guest lectured on the topic of IT and information management in leading universities, industry conferences and Fortune 500 companies across the country.

## David Wells

Dave Wells is a consultant, teacher, and practitioner in the field of information management. He brings to every endeavor a unique and balanced perspective about the relationships of business and technology. This perspective —refined through a career of more than thirty-five years that encompassed both business and technical roles— helps to align business and information technology in the most effective ways. Dave is a frequent contributor to trade publications and is a co-author of the book *BI Strategy: How to Create and Document*. He also speaks at a variety of industry events.

## OUR CUSTOMERS

eLearningCurve has students in almost every country in the world, including many enterprise customers.



- Variety of customers from small project teams to large enterprises
- Enterprise customers typically Fortune 500 and Global 1000 companies
- All major industries are represented

## WHAT OUR CUSTOMERS ARE SAYING...



**The courses are well laid out, build on each other, and are rich in practical content and advice.**

-- Steve Lutter, CIMP Data Quality, DM and Metadata, IM Foundations, Business Intelligence, Data Governance, MDM, United States



**It is evident that a thorough and considerable effort has gone into the preparation of this program.**

-- Alfredo Parga O'Sullivan, CIMP Ex Data Quality, Ireland



**The ability to take the courses at my own pace and at a time suitable for me was of great help.**

-- Geeta Jegamathi, CIMP Data Quality, India

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## MDM COURSE PRICING

### Packages

CIMP Master Data Management Package	\$2,095
CIMP Ex Master Data Management Package	\$3,155
CIMP Ex Data Quality & MDM Package	\$3,795
CIMP All Course Access License	\$4,995
CIMP All Course Access License w/ Exam Package	\$6,240

### Individual Courses

MDM Fundamentals: Architecture & Implementation	\$460
Data Profiling	\$520
Data Parsing, Matching & De-duplication	\$435
Data Governance Fundamentals	\$500
Metadata Management Fundamentals	\$385
Data Quality Assessment	\$510
Data Quality Scorecard	\$515
Ensuring Data Quality in Data Integration	\$525
Data Privacy and Protection Fundamentals	\$520
Master Data Management for Data Stewards	\$475

### Exams

CIMP Exam for each course	\$100
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### Enterprise Discounts

We offer discounts to Enterprise customers who purchase in bulk. Please contact us for more information.

## About eLearningCurve

eLearningCurve offers comprehensive online education programs in various disciplines of information management. With eLearningCurve, you can take the courses you need when you need them from any place at any time. Study at your own pace, listen to the material many times, and test your knowledge through online exams to ensure maximum information comprehension and retention.

eLearningCurve also offers two robust certification programs: CIMP & CDS. Certified Information Management Professional (CIMP) builds upon education to certify knowledge and understanding of information management. Certified Data Steward (CDS) is a role-based certification designed for the fast growing data stewardship profession.

Finally, eLearningCurve's Enterprise Program is a flexible, scalable, cost-effective solution for teams and enterprises.