Solidatus

DATAVERSITY® Demo Day

Solidatus™ - Reducing Risk while Increasing Enterprise Data Governance Efficiency
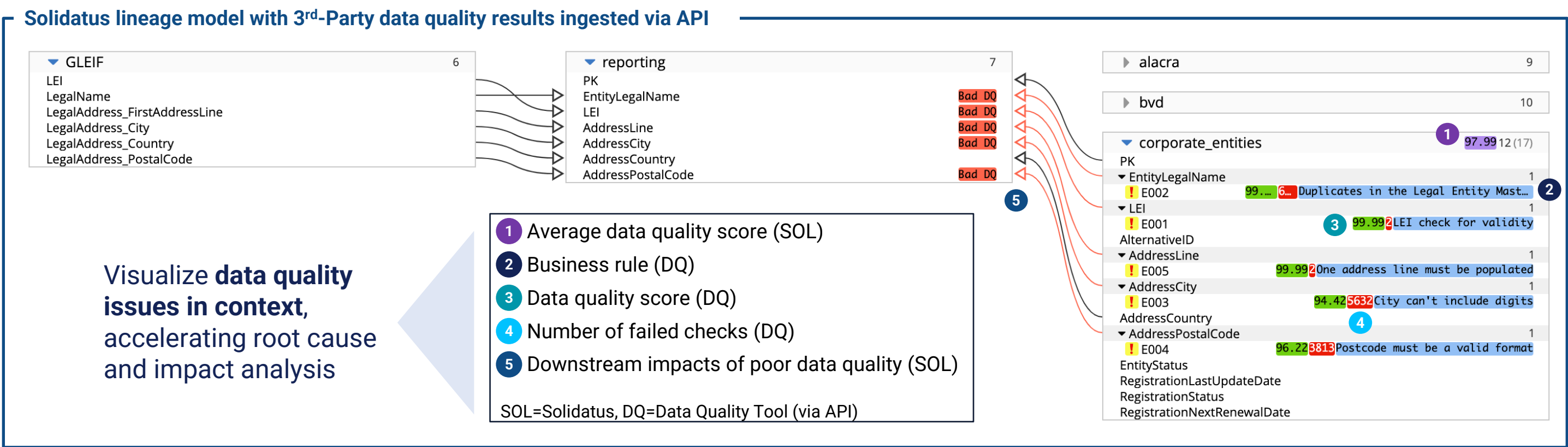
November 2022

Introduction to Solidatus

- A decade in the making, **Solidatus was brought to market in 2017** by co-founders Philip Dutton and Philip Miller

- Built on **35 years of consulting experience** to address a consistent pattern of data management limitations

- Global company with HQ in **London,** with Regional Hubs in **New York, Charlotte, Houston** and **Singapore**

- Clients include **top-tier global financial, healthcare, retail** and **government** organizations

- Solidatus is a powerful platform that **enables active data management** and **connected governance**

- With Solidatus, **you can visualize how data flows across your organization with context** - such as connections to the obligations that regulate it, policies that guide it and processes that create/use it

"Our ambition is not only engineering a very necessary piece of software, but also to build a company that is **collaborative, inclusive and forward thinking** – a tech company of the future in terms of our ethos as well as our product."
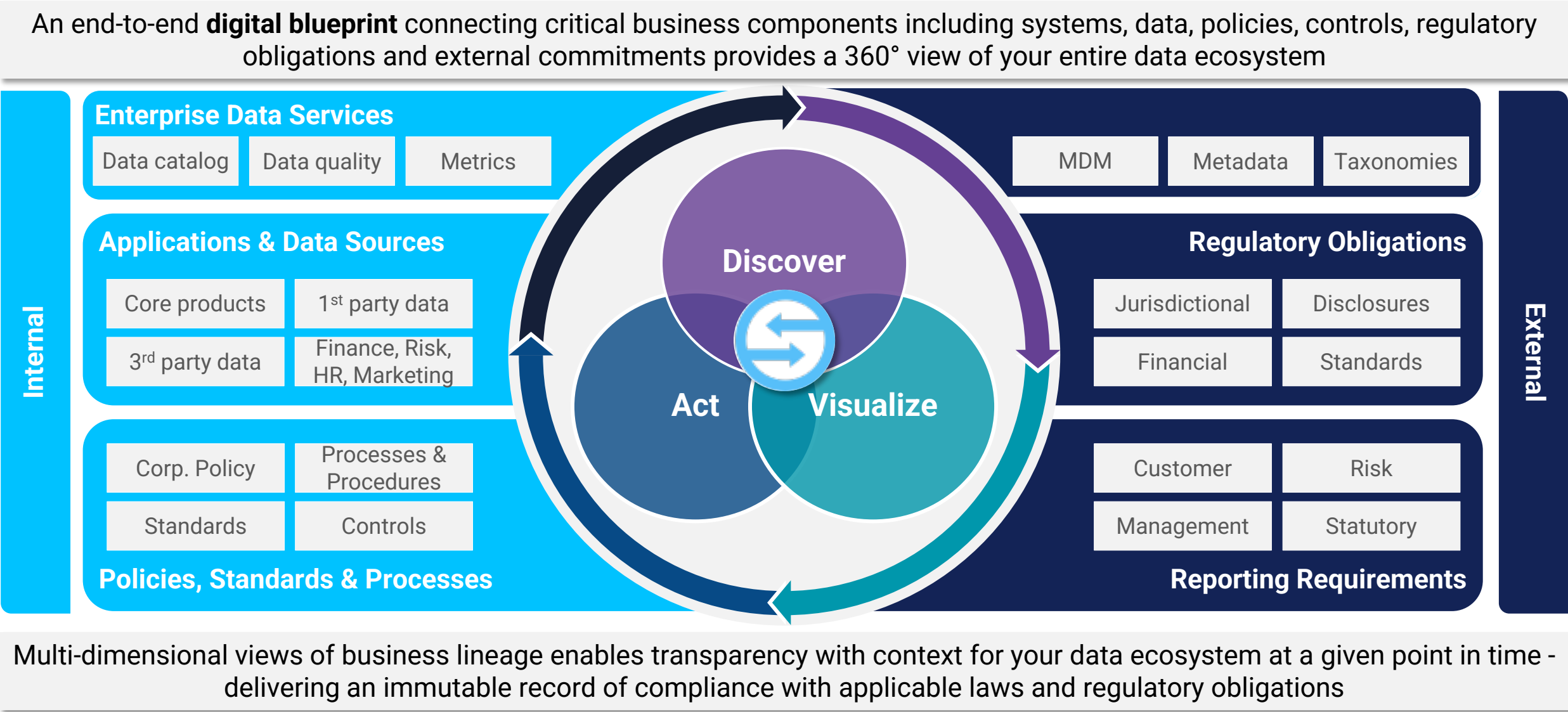
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Our product

Solidatus leverages **cutting edge technology** to take advantage of the best software engineering practices and methodologies to produce **an industry leading, cloud-native and browser-optimised data governance platform**. As the hub for your organization's metadata management, Solidatus and its API supports all operations programmatically. It integrates metadata updates from other systems and sources and takes advantage of its full version history change management functionality.

Solidatus lineage model with 3rd-Party data quality results ingested via API

Visualize **data quality issues in context**, accelerating root cause and impact analysis

1. Average data quality score (SOL)
2. Business rule (DQ)
3. Data quality score (DQ)
4. Number of failed checks (DQ)
5. Downstream impacts of poor data quality (SOL)

SOL=Solidatus, DQ=Data Quality Tool (via API)

With this flexibility, **our customers have the power to select the best fit-for-purpose capabilities** to visualize and understand data quality across the enterprise without being tied to a single enterprise data governance and quality platform.
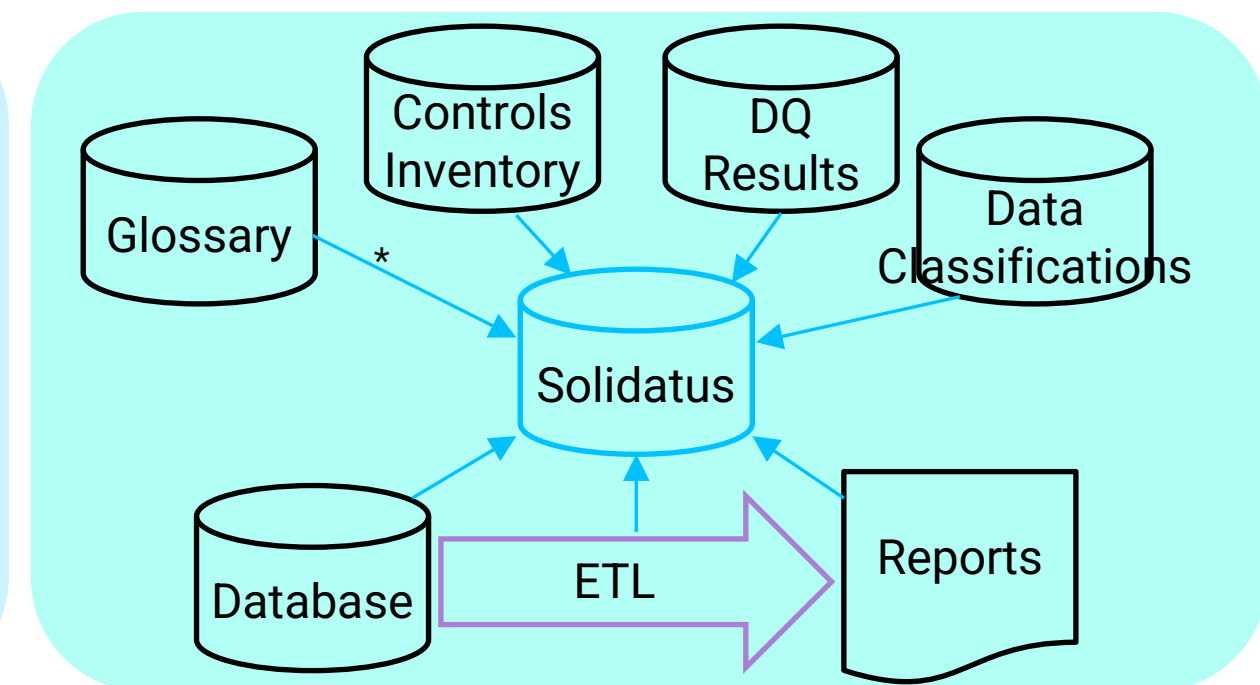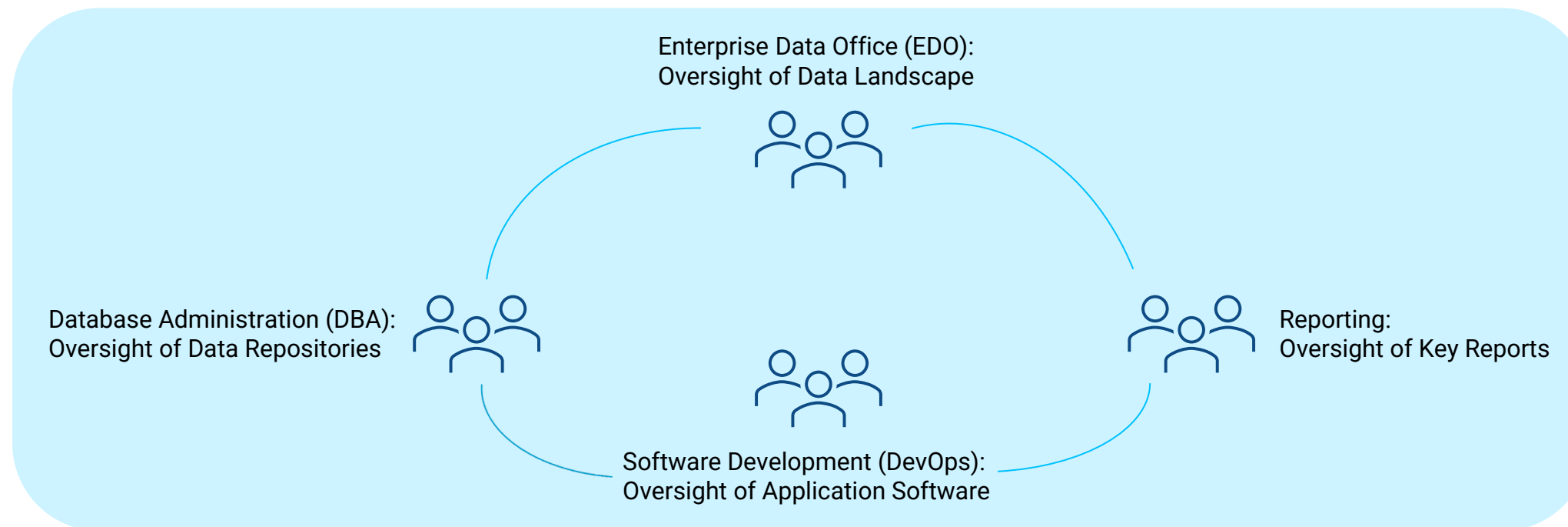
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Our philosophy - everything is connected

Data consumers are found in **every function** and at **every level of your organization**. Consequently, **vast amounts of data** are collected with little context as to its origin or meaning. With Solidatus, you can **gain clarity over your entire data ecosystem** to understand **why data is being used** and **how it is connected**.

An end-to-end **digital blueprint** connecting critical business components including systems, data, policies, controls, regulatory obligations and external commitments provides a 360° view of your entire data ecosystem

Internal

Enterprise Data Services

| Data catalog | Data quality | Metrics |

Applications & Data Sources

| Core products | 1st party data |
| 3rd party data | Finance, Risk, HR, Marketing |

| Corp. Policy | Processes & Procedures |
| Standards | Controls |

Policies, Standards & Processes

Discover

Act   **Visualize**

| MDM | Metadata | Taxonomies |

Regulatory Obligations

| Jurisdictional | Disclosures |
| Financial | Standards |

| Customer | Risk |
| Management | Statutory |

Reporting Requirements

External

Multi-dimensional views of business lineage enables transparency with context for your data ecosystem at a given point in time - delivering an immutable record of compliance with applicable laws and regulatory obligations

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What you'll see today

1. A simple starting example to get our terminology straight

2. Three days in the life (each day dramatically reduced to about 7 minutes ☺)

3. Four teams (Enterprise Data Office, Database Administration, Software Development, Reporting) working together, federated responsibilities

   - Day 1: Automated lineage capture from a Database, ETL tool and Reporting platform to obtain end to end lineage

   - Day 2: Consumption of data classifications into Solidatus (CDEs and PII) and capturing relationships to a Business Glossary

   - Day 3: Consumption of controls, data quality results, monitoring and actioning via Solidatus

Enterprise Data Office (EDO):
Oversight of Data Landscape

Database Administration (DBA):
Oversight of Data Repositories

Reporting:
Oversight of Key Reports

Software Development (DevOps):
Oversight of Application Software

Glossary · Controls Inventory · DQ Results · Data Classifications · Solidatus · Database · ETL · Reports

* Imports are all the same to Solidatus, whether Connector, API, SDK, or file-based consumption

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Demo: Days 1 - 3

What you've seen

1. With automated imports, Solidatus quickly captures a significant amount of fine grain lineage and metadata from outside systems

2. Solidatus Rules, Filters and Views allow you to:

   - Rapidly filter out the noise and focus on your key business question

   - Create and persist views which support specific persona requirements

   - Answer business questions that can only be answered in Solidatus, as it is the one place capable of aggregating all metadata and bring it to life, making it easily understandable and consumable by human beings.

3. This was all real (it's all the same to Solidatus, whether Connector, API, or file-based consumption)

   - Captured automated lineage from a live SQL Server db, which included derivation of lineage for stored procs and views

   - Captured automated lineage from Informatica Power Center

   - Captured PowerBI metadata & lineage (was loaded prior to demo)

   - Swiftly created end to end lineage by using Solidatus' SOL.UID

   - Loaded Classifications, Controls, DQ Results and mapped them contextually into lineage

   - Related Business Glossary terms and a Controls framework to the physical assets

   - Leveraged Solidatus Rules, Filters and Views to query the graph and drive monitoring & triage activity

4. And note: <u>All work was done on one pane in the UI</u>. We did not hop from screen to screen and get lost in the application

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Some key things you didn't get to see

1. Auto-mapper has much more functionality available than time allowed to demo

2. What-if analysis

3. Global Catalog Search

4. Only touched lightly on relationships to reference models

   - Logical Data Models

   - Conceptual Data Models

   - Business Glossaries

   - Policies, Standards & Procedures

   - Regulations

5. Relationships across logical constructs (e.g., mapping of GDPR to CCPA to understand commonality & impact of differences)

6. Email Notifications, Login Notifications, workflow design and approvals

7. Dashboards (to be released soon)

8. Numerous other capabilities

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Thank you! ☺
Questions?

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Appendix

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Overview of core product features

Audited and versioned workflow

Complete audit trail of all changes automatically maintained, with powerful visualization functionality to display all differences along timeline

Enterprise scale and performance

Solidatus' browser-based UI coupled with complete freedom over choice of cloud or on-premises installation eliminates all size-related constraints

Intuitive, flexible, extendable

A flexible metamodel and an intuitive UI mean Solidatus is for anyone who needs to understand data lineage and metadata

Connectivity, automation and API

Solidatus' wide range of out-of-the-box connectors, in conjunction with its powerful API, enable ingestion of metadata from all possible sources

Collaborative and social

Subject Matter Experts can record, syndicate, explain and share their expertise, while retaining total ownership of their metadata and models

Real-time and run time notifications

In addition to its complete audit trail, Solidatus permits configurable alerting over all change, ensuring appropriate monitoring to be maintained

Advanced rules engine and query language

Automate enforcement of metadata ontology and taxonomy standards, validation rules, naming standards, while identifying and reporting inconsistencies in the repository

Tag, classify, catalog and link

Managed metadata enables data users to be confident they have the data they require - correct, complete, and quickly found

Global "amazon-like" search

Our robust, yet simple search interface allows business users to access the metadata and context they need without requiring data expertise
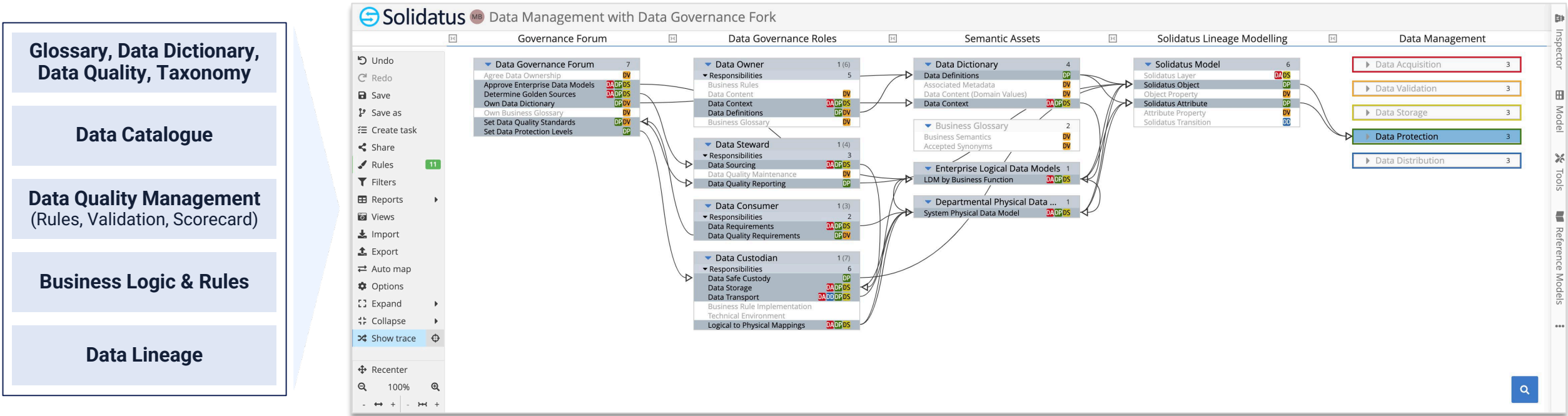
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We understand enterprise data complexity

Reality

Key ingredients of enterprise data management may exist, but seamless integration is a challenge

Glossary, Data Dictionary, DQ, Taxonomy

Data Catalog(s)

Glossary, Data Dictionary, DQ, Taxonomy

Data Catalog(s)

Data Quality Management

Data Quality Management

Data Quality Management

Lineage

Business Logic & Rules

Business Logic & Rules

Business Logic & Rules

| Source Applications | ETL Processes | | Data Lake(s) | Curated Data | | Analytic Sandboxes | Enterprise Data | | Reports | Dashboards | BI |

Data Lifecycle

Data Sourcing → Data Distribution & Storage → Advanced Insights & Analytics → Consumption & Reporting

Vision

Remove data management silos to create a unified, enterprise governance view that creates an equitable understanding of your data ecosystem

Glossary, Data Dictionary, Data Quality, Taxonomy

Data Catalogue

Data Quality Management (Rules, Validation, Scorecard)

Business Logic & Rules

Data Lineage

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Our approach

Solidatus takes a **lineage-first approach** to enable **active data management** and **connected governance**. With Solidatus, you can create interactive and living blueprints that visualize **how your data flows** and the **connection to the obligations that regulate it, your policies that guide it and your processes that create or use it** – both now and at other points in time.

With our **integrated catalog capabilities,** you can capture, link and manage information concerning **physical assets, record sets, glossaries, dictionaries and other taxonomies.**

Solidatus will enable your semantic layer by mapping your data and overlaying it with business context. The highly visual and agile nature of the solution will allow you to **quickly interrogate and analyze mappings**, helping with **impact analysis** and **change management.**
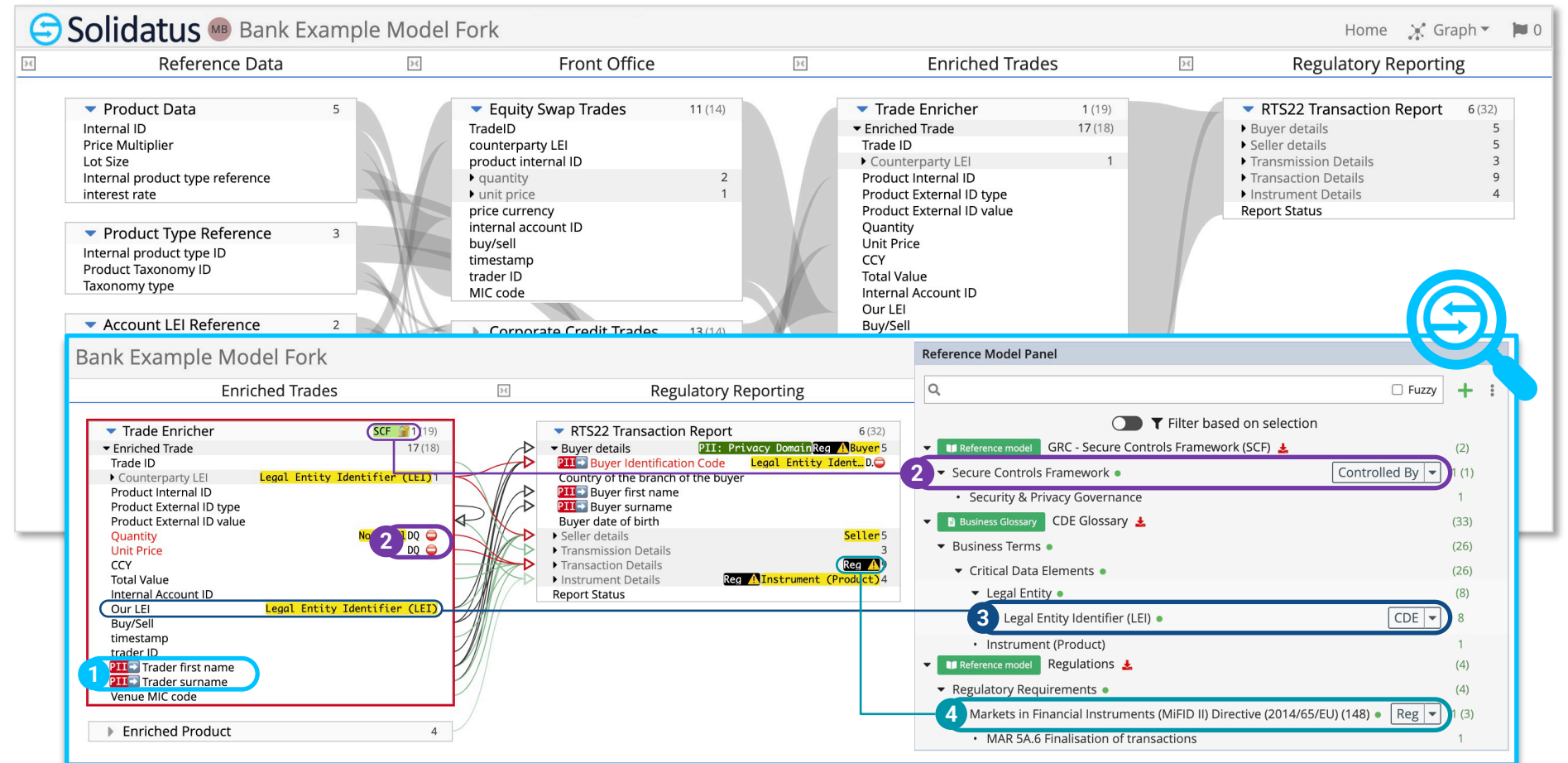
1 Tag **sensitive data / PII** to understand how it flows and where it resides across the enterprise

2 Bring together **data quality** and **business control** inventories for a cohesive view of the control environment

3 Integrate **business glossary with data lineage**, easily with one solution

4 Trace **regulatory obligations** against policies, standards and processes

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Our differentiators

Solidatus **provides the tools to harvest metadata** from systems with differing levels of 'metadata maturity', including systems which provide their own attribute-level lineage, those where only structural metadata is available, and those which are effectively a black box. Solidatus has capabilities and **connectors to automate** metadata collection, and **importers to accelerate** manual tasks.

Stale metadata gives a false sense of security, so the **ability to automatically ingest updates** and to minimise friction for manual updates is critical. However, this must be accompanied by control and audit.

Solidatus tracks all revisions of metadata and the visual difference view clearly documents changes between any revisions.
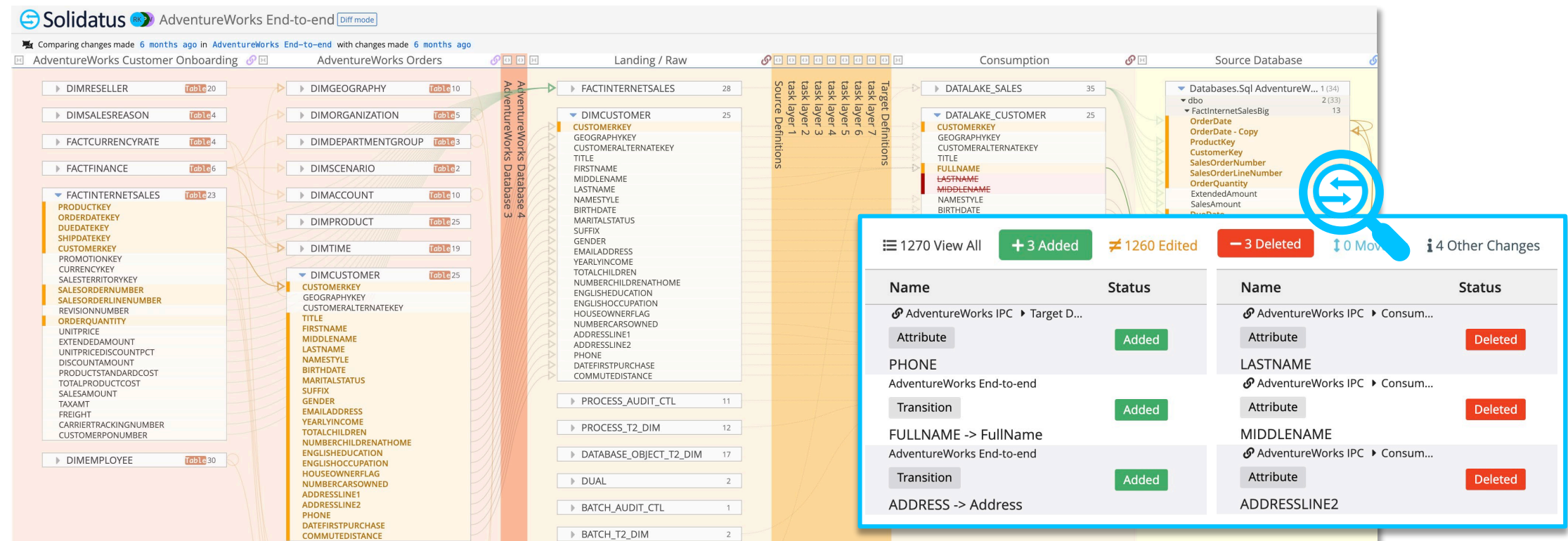
We understand today's business challenges

A **digital blueprint** of your ecosystem **will deliver significant benefit to any individual program**, such as digital transformation, cloud migration and regulatory compliance (i.e., BCBS 239, IFRS 17). The **ability to connect** these programs **across your enterprise will deliver immeasurable business benefits**. A **Solidatus blueprint provides an aerial level view of your business**, even when you're focusing in on a particular part of your operations, in a way that is scalable, traceable, and responsible.

Front-Office: Line(s) of Business
- Shift in focus from product-centric to customer-centric, requiring real-time insights and analytics to respond to customer needs and predict future behavior

Back-Office: Operations
- Digital Transformation efforts have largely focused on front-end "customer facing" functions, while operations remain complex with siloed data sources and paper-processing

Technology / Transformation / CIO
- Significant multi-vendor business resiliency programs in flight to replace legacy platforms and data warehouses to mitigate EOL risks; increased pressure to reduce or eliminate technical debt

Enterprise Data Office
- Pivot from focus on defense (safety and soundness) toward offense (proactive business enablement incl. advanced analytic capabilities), expanding CDO role to generate value by monetizing data services

Risk & Compliance
- Complex and highly manual processes required to aggregate data impacting ability to meet on-demand ad-hoc regulatory requests and market events

Finance / Regulatory Reporting
- Complex regulatory landscape with evolving requirements combined with internal pressures to reduce cost of production activities while increasing level of trust (automation)
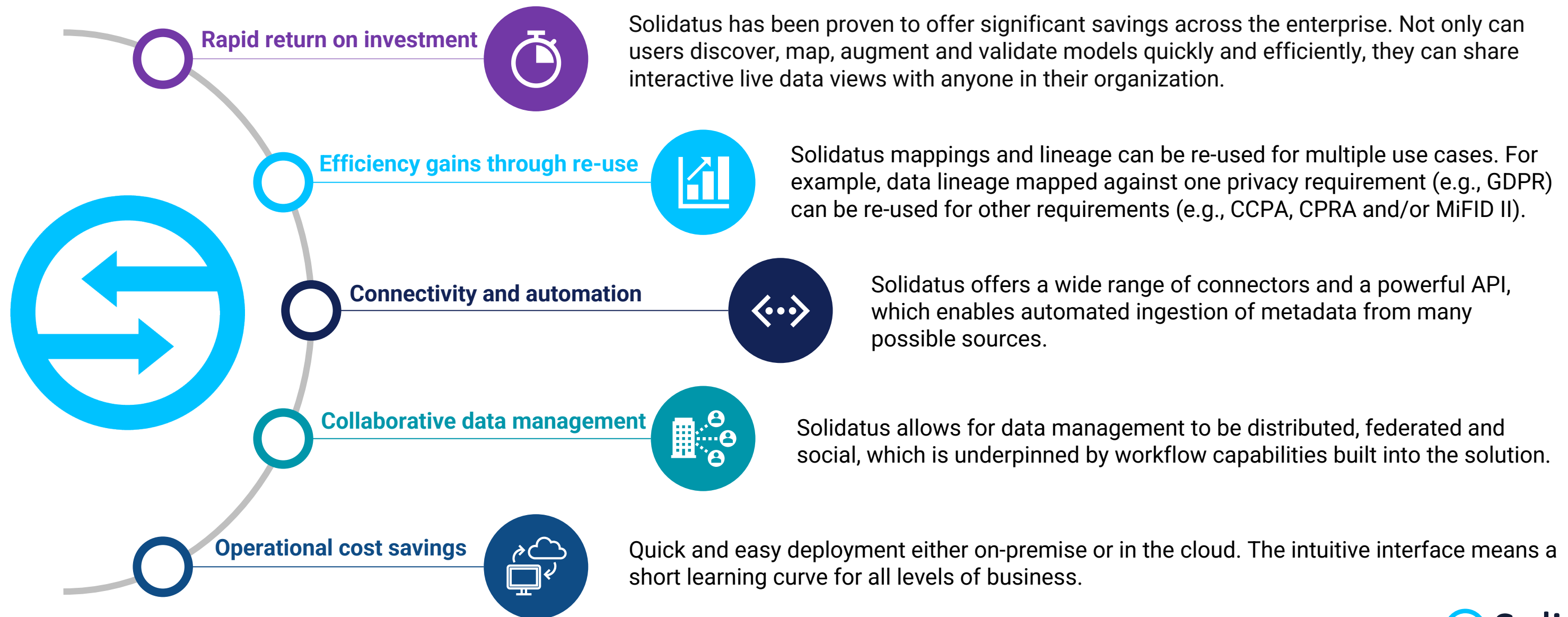
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Our business solutions

Our solutions are designed to **deliver early success, achieve rapid ROI** and build a foundation for **sustainable data governance**. We extend beyond traditional data governance by adding key business dimensions including **glossaries, definitions, ownership, privacy and authority**, which are all **visualized in context** and maintained in Solidatus **through both a business and an IT lens**.
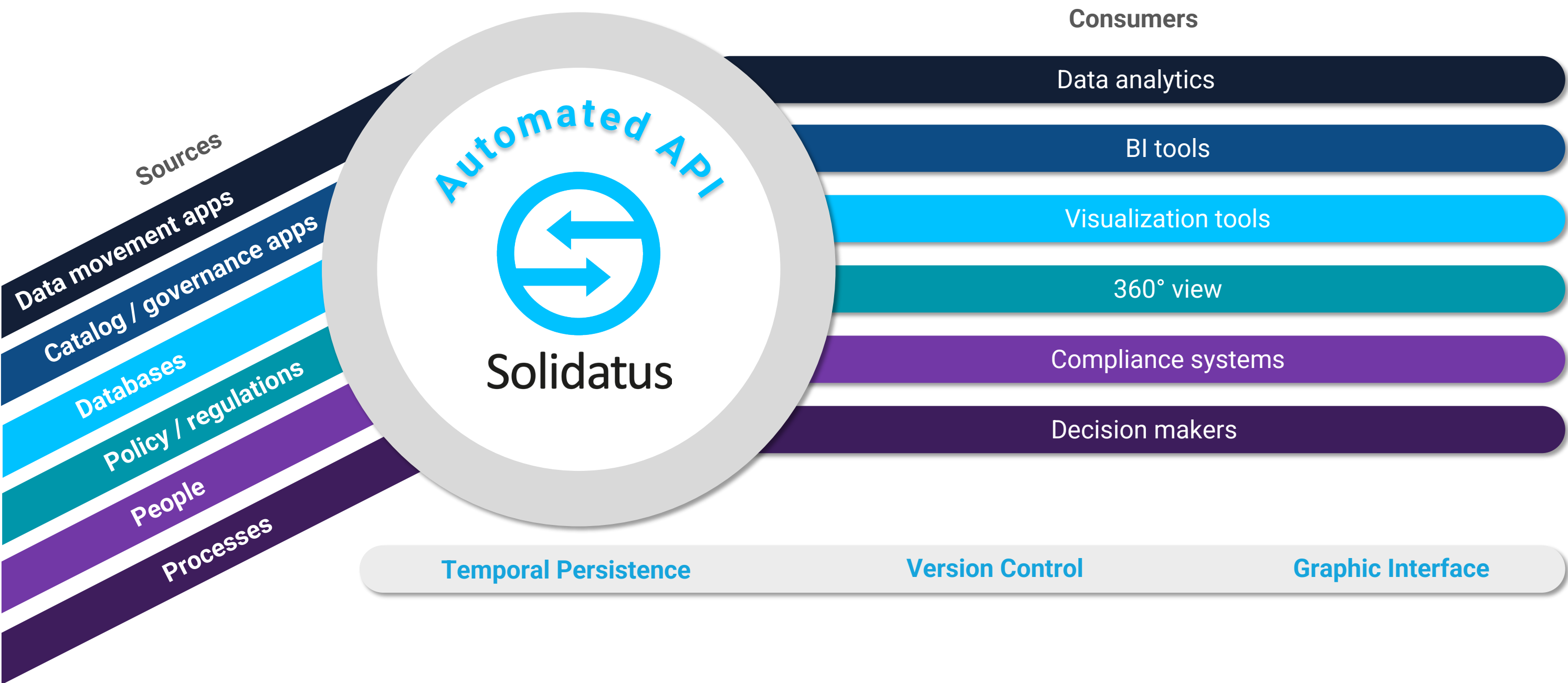
Governance & Regulatory Compliance

- Provides **transparency** for executive decision-makers, board members and regulators **that critical data elements and sources are well-known, and controlled**
- Visualize **data quality issues in context**, accelerating root cause analysis and improving data quality across the value chain
- Delivers **digitized, immutable evidence of compliance with legal requirements**, reducing manual effort and resource costs involved in preparing for examinations

- BCBS 239
- GDPR
- CCAR
- DCAM/CDMC
- Reg. Report Automation (i.e. 2052a, FRY-14)

Data Risk & Controls

- Connecting **data flow to information risk and control framework** provides transparency and traceability of data-driven governance
- Provides insight for simplification and consolidation of information sources improving **discoverability and management of data as it is migrated to the cloud or decommissioned**

- Records Management
- Financial Crime (AML, KYC/KYS)
- Customer/Client Onboarding
- Third-party Risk

Business Integration

- Connected **360° view of strategic program elements** such as business capabilities, processes, and key information assets **enables identification and quantification of business benefits**
- Conduct **scenario planning and impact analysis** to more accurately quantify upstream and downstream impacts of change

- Digital Transformation
- Cloud Migration
- Finance Transformation
- Operational Resiliency

Data Sharing

- Enables **digitized global data sharing framework** (inc. data residency, data localization requirements) **to automate request/approval process**, reducing or eliminating lengthy, inconsistent manual review cycles
- Unlock **greater business value from data** that is otherwise tied up in complex processes

- Data Sovereignty
- Data Localization

ESG

- Provides **connected approach** across evolving regulatory requirements **by linking Environmental, Social and Governance (ESG) principles, company priorities, assessment methodologies to data sources and metrics** for a full end-to-end picture of the impact of ESG initiatives

- Sustainable Finance
- ESG Data Strategy
- Supply Chain Risk

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Key benefits

Solidatus delivers both **quantitative and qualitative business benefits** by **eliminating costly data blind spots**, thereby significantly reducing implementation and running costs, **mitigating transformational and operational risk** with our **connected governance approach**, and **achieving greater organizational alignment**.

Rapid return on investment

Solidatus has been proven to offer significant savings across the enterprise. Not only can users discover, map, augment and validate models quickly and efficiently, they can share interactive live data views with anyone in their organization.

Efficiency gains through re-use

Solidatus mappings and lineage can be re-used for multiple use cases. For example, data lineage mapped against one privacy requirement (e.g., GDPR) can be re-used for other requirements (e.g., CCPA, CPRA and/or MiFID II).

Connectivity and automation

Solidatus offers a wide range of connectors and a powerful API, which enables automated ingestion of metadata from many possible sources.

Collaborative data management

Solidatus allows for data management to be distributed, federated and social, which is underpinned by workflow capabilities built into the solution.

Operational cost savings

Quick and easy deployment either on-premise or in the cloud. The intuitive interface means a short learning curve for all levels of business.

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Solidatus in your ecosystem

Sources

- Data movement apps
- Catalog / governance apps
- Databases
- Policy / regulations
- People
- Processes

Automated API

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Consumers

- Data analytics
- BI tools
- Visualization tools
- 360° view
- Compliance systems
- Decision makers

Temporal Persistence   **Version Control**   **Graphic Interface**

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Use cases

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What our customers say

Citi

"Our partnership with Solidatus will bring state-of-the-art technology to enhance our data ecosystem. It's critical we understand our organizational data flow to enable us to deliver efficiently to our clients."

Stuart Riley — Global Head of Operations and Technology, Citi's Institutional Clients Group

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BNY MELLON

"Data is key to everything we do at BNY Mellon. Ensuring we have proper data governance is essential to how we operate. Solidatus is helping us extend and integrate the metadata repositories we use to maintain our market leading data complex. Solidatus is helping BNY Mellon drive better data outcomes"

Eric Hirschhorn, Chief Data Officer at Bank of New York Mellon

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HSBC

"Our cross-border data sharing approval process was impeding change through a heavily manual and slow procedure. Solidatus' transformative technology powered our solution, digitizing data sharing approval requests and delivering an automated response based on a set of predefined parameters. What was taking months is now taking minutes!"

Matthew Widick — Group Head of Data Management, HSBC

NOW: Pensions

"With Solidatus, our data estate is now mapped, modeled and catalogued. In a single view, I can show the business where their data resides, how it flows through systems and applications, what data quality rules apply and what data is subject to GDPR. Solidatus is central to the way that we govern data."

Phil Yeoman – Group CDO, Cardano and NOW: Pensions

BCBS 239 : a case study

About our customer

A global investment bank, with systems and entities around the world, determined that its Data Governance system was inadequate for BCBS 239 compliance.

The bank needed to link together its disparate data, systems and processes around the world to meet BCBS 2329 risk reporting requirements.

Working with Solidatus, the bank was quickly able to implement a simple, intuitive system to streamline BCBS 239 risk reporting.
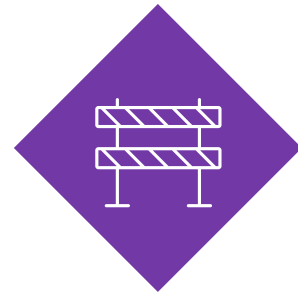
Their challenges

- The bank's risk data aggregation capabilities and internal risk reporting practices were fraught with operational bottlenecks, functional gaps and a frustrating user experience.
- Complexity was high given siloed systems, an Oracle Data Warehouse (ODW) with 30 sources, countless calculations and data transformations embedded in code, and growing volumes of critical data elements.
- The resulting data quality issues were exacerbated by an inability to run effective analytics.

Our solution

- Using Solidatus, the bank implemented a fit-for-purpose 'lineage first', metadata management and data quality solution.
- Within two weeks, created a Data Dictionary, automatically mapping 80% of fields and relationships using the Oracle Data Dictionary tables and tailored PL/SQL routines, and populating 20% using Solidatus' collaborative version control – complete with a full audit trail.
- Developed a column dependency table to automatically track field dependencies in the metadata so that changes flow to all dependent fields, enabling meaningful reporting. Version control also allowed for tracking of manual updates.

Outcomes achieved

The bank was able to dynamically connect and visualize complex data relationships across the organization's many sources, greatly improving data quality, governance and access for more accurate BCBS 239 reporting and compliance.

- Developed the bank's first, comprehensive data dictionary, including automated updates to dependent fields with complete traceability.
- Improved risk reporting and provided a reference point proving outcomes to both regulators and senior management.
- Ensured the bank's Production models were in sync with their Pre-Prod and UAT models, reducing the risk of variables in their DevOps cycle.
- Institutionalized knowledge of SMEs documented within Solidatus, removing Key Person Risk.

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# **Cloud migration** : a case study

About our customer

A UK government entity had launched an initiative to improve the quality of their data and establish one version of truth as part of a wider Cloud migration program.

Working with Solidatus, the council was quickly able to map all their data assets, relating them to an Organizational Glossary and the Information Asset Register.

This facilitated collaboration, trust and confidence in their data, overcoming unclear data ownership, lack of common business concepts and correctly dealing with a proliferation of sensitive data.
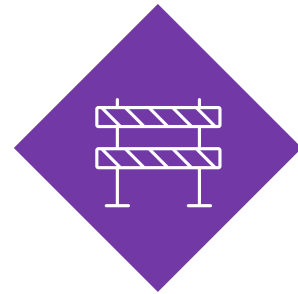
Their challenges

- The council's data landscape had data silos that spanned departmental, application and system divides – a typical consequence of implementing systems over many years across a complex environment.
- Problems meeting deadlines in responding to novel requests and situations – for example, failing to meet deadlines for Subject Access Requests (SARs) which can result in financial penalties.
- They also had problems with data duplication and manual data re-entry to bridge systems or create ad-hoc reports – the extent, location and frequency of these work arounds were not clear.

Our solution

- Using Solidatus models to map the AS IS state and the TO BE picture of their data with lineage to show the data flows was the first step, giving knowledge and traceability of where data is located. This facilitated the development of dynamic reporting by identifying any duplicates, seeing differences and reporting progress through the migration.
- They built a Taxonomy in Solidatus, allowing them to standardize the terms used, adding tags and descriptions which can be used for searching, enabling greater collaboration of common data across diverse departments.
- A Single organizational Business Glossary was created, holding the data's purpose (the metadata standards which links to the taxonomy).

Outcomes achieved

- Improved response times to subject access requests - what had previously taken up to three weeks, they are now able to complete within one day, resulting in reduced fines and any resultant enforcement actions.
- With Solidatus, the council now has a 360° view across their organization allowing the identification of key common data sets and the consolidation of duplicate data which has improved process efficiency and eliminated wasted spend where multiple departments had been purchasing the same external data.
- Through the visualization of their data landscape, Solidatus' highly accessible platform has improved the capability of Self-Serve across all staff and employees – even those in non-IT roles. When the audit team were shown their COVID-19 data, they included the use of data lineage mapping as a key recommendation to the audit.

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# Cross-border data sharing : a case study

About our customer

With over 40 million customers, operating in 64 countries and territories, our global tier 1 bank client struggled to share data efficiently across the organization due to regulatory complexity and burdensome manual processes.

In under six months of using Solidatus, the bank automated data sharing workflows enabling real-time, auditable and compliant data access for all users.

With Solidatus, the bank has unlocked greater business value from data that had been tied up in complex processes. With streamlined and automated data sharing processes, the bank's data users are saving time, lowering costs and reducing compliance risk, all while delivering results faster and more accurately.
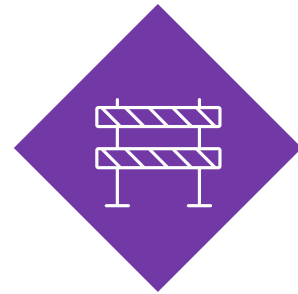
Their challenges

- The bank's existing global data sharing process was outdated, manual and unscalable, with countless documents, hand-offs and approvals required.
- Data access and usage requests needed to be better understood and tracked, but slow responses were delaying business results.
- Managing regulatory changes from multiple jurisdictions around the world frequently required lawyers to update compliance procedures across the data supply chain, but these manual processes were time-consuming and increased risk.

Our solution

Solidatus helped the bank to automate end-to-end data sharing processes while ensuring compliance.

- Digitized and incorporated the bank's global data privacy framework into cross-border data sharing agreements.
- Provided one platform to upload inputs (such as terms and conditions), identify meaningful relationships and codify metadata, with a query language to interrogate the models automatically notifying conditions and restrictions of data use.
- Streamlined processes and outputs for users and relevant stakeholders, such as connecting applications and automating data approvals based on rules – in real-time.

Outcomes achieved

- The Solidatus-powered self-service solution provides instant answers to data access requests, removing the previous months-long operational bottleneck of contractual, legal and regulatory processes.
- The bank now has a more holistic, firm-wide view of data sharing and any restrictions, remaining compliant with applicable laws and regulations.
- This was all accomplished in six months by the bank's Solidatus users, supported by in-house legal and compliance teams, covering many data-sharing frameworks, eliminating outdated processes and redeploying 400 operational staff to higher value work.
- Increased efficiency by automating user entitlements and access through the Active Directory while respecting jurisdictional controls.
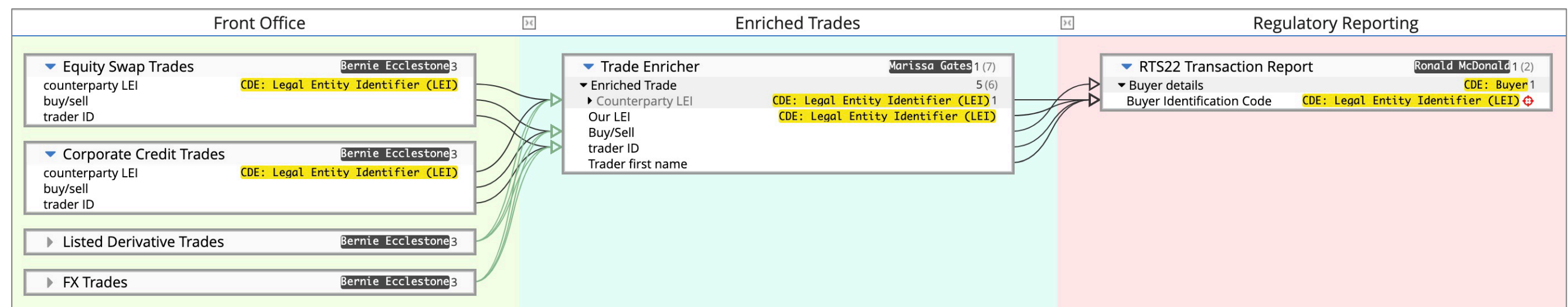
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FAQs

Response to questions

Data Governance capabilities - ex. Business Glossary, defining Data Ownership, Relationship amongst CDE (Critical Data Element)

Solidatus Business Glossaries are fully integrated, feature-rich and intuitively designed. Helping organizations rapidly identify, standardise, document and share their common taxonomies in order to communicate consistently and thus exploit their most valuable asset – their data. Solidatus enables business glossaries to be tagged and linked seamlessly with data lineage models and asset inventories creating a complete end-to-end map of all data held, its interaction with language, policy and standards.

Solidatus Data Dictionaries enable a consistent terminology across an organization, helping to ensure accuracy and integrity of communication. A modern data dictionary should enable centralised control with a collaborative, federated model for suggesting, agreeing and maintaining terms, definitions and data that supports their use.

In below example you can see where the CDE "Legal Entity Identifier" has been associated to a physical data flow. Additionally, the governance roles (Application Owner, Data Owner, etc.) can also be associated at any entity level (layer, object or attribute).

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Response to questions

Workflow - What kind of workflow capabilities does the tool provide?

Solidatus has been engineered from the first line of code with collaboration in mind. Taking inspiration from distributed source control technologies and work practices, Solidatus allows data management to be distributed, federated and social. Allowing subject matter experts with vast quantities of explicit and tacit knowledge to discover, document, validate and disseminate information and knowledge.

Solidatus has a customisable approval workflow which allows collaboration within the Data Governance team. Figure 1 below represents a typical approval workflow.

Figure 1

Solidatus has a Role Based Access Control (RBAC) with the concept of groups and users. Figure 2 lists the capabilities provided for each model role where all the data assets reside, allowing the Owner of a Model full control and Approvers the ability to approve requests.
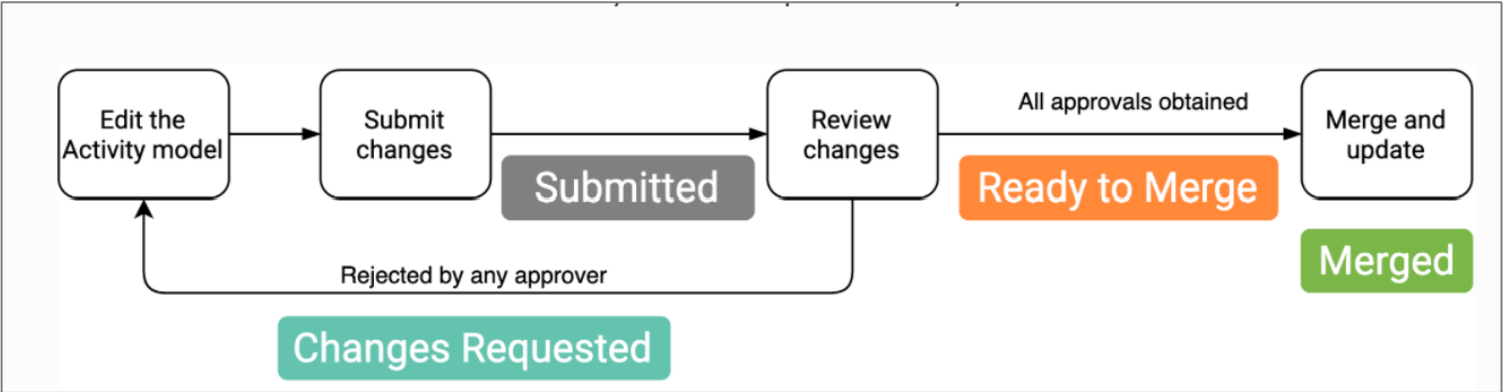
Figure 2

Description	Owner	Author	Approver	Viewer
Edit model settings and permissions	X			
Delete the model	X			
Merge Pull Request / task / model import update	X	X		
Create, edit, and assign tasks	X	X		
Edit the model directly (without creating a Fork)	X	X		
Approve activities	X	X	X	
View model and model history	X	X	X	X
View tasks/Pull Requests/model import updates	X	X	X	X
Comment on tasks/Pull Requests/model import update	X	X	X	X
Create and edit a model Fork	X	X	X	X
Submit Pull Request from Fork	X	X	X	X
Export the model	X	X	X	X

Response to questions

Catalog and Search - What kind of cataloging features do they have? Do they have robust search functionality to search metadata?

Solidatus believes transparency creates understanding: Solidatus makes it easy for all users to find the data they are looking for and the context that surrounds it. The powerful search toolset allows users to find the data they need quickly and simply.

Tag, classify, catalog and link
The Solidatus metamodel provides users with the ability to specify and assign as many business, technical or other tags or properties as required to both the data structures such as systems, tables, fields, reports, etc, as data pipes.

Response to questions

Exporting - How easy it is to export data collected by the tool?

Model structure, mappings and metadata can be exported through the export dialog which can be accessed from the toolbar. You can export whole models or selected layers, objects, groups, attributes, transitions, and properties. It is possible, for example, to export a full lineage model with all of its metadata, or just export a single object or property.

Solidatus models may be exported in the following formats:
- CSV
- Control-M XML
- JSON
- YAML

It is often possible to manipulate data in the Excel and the JSON format so that you can update your models outside of the Solidatus Application before re-importing them.

Examples of this can include
- Adding properties in bulk
- Importing transitions from another model
- Updating relationships from an old to a new reference model

Grid Reports

Solidatus has various reporting and dashboards mechanisms out-of-the-box, in addition has an open industry standard API and various export mechanisms for further downstream processing with other third-party business intelligence tools if required.

Reporting
Reports are created using a wizard using standard parameters and in addition can be created using the Solidatus query. Once created, the report can be saved as depicted to be used on a regular basis by the wider team.

Grid report: Source mappings of selection

This reports shows all source mappings of the currently selected entity (or entities)

Built 17 rows using the current selection (1 Object (Risk Report))   Export CSV   {} Export JSON

Object	Attribute	Source object	Source attribute
Risk Report	Trade Id	Trade Data	TradeId
Risk Report	Counterparty Short	Trade Data	Cust
Risk Report	Book	Trade Data	Book
Risk Report	Version	Trade Data	Audit_Version
Risk Report	Desk	Trade Data	Desk

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Response to questions

Training – Does Solidatus provide training?

Solidatus offers a structured training and education curriculum

- We follow a 'Why, tell, show, do' approach: designed to give learners the opportunity to practice what is being taught. As of 2022, Solidatus offers blended learning due to the introduction of our virtual learning environment: learn.solidatus.

- Upon completion of the appropriate e-learning course we offer instructor-led training, which is currently being delivered remotely. These are typically between 2-4 hrs in length, each with an upper limit of 10 learners to maximize engagement and collaboration.

- Learners that attend are encouraged to be logged into Solidatus to participate in group/individual exercises, that are designed to put the learning into action.

Included in the cost of the PoC are the Model explorer, Model builder and Collaboration sessions (details on following pages)

Model explorer	Model builder	Collaboration
Completed via Learn.Solidatus	**Completed via Learn.Solidatus**	**Webinar** 10
For those with a 'Viewer' license	Learners will gain access to our virtual learning environment.	Review of the Model builder course
Learners will gain access to our virtual learning environment.	This e-learning course is a prerequisite to future training.	Collaboration: Sharing, Groups, Forks, Tasks.
2hrs (depending on how you choose to engage with the content)	2.5 – 5.5hrs (depending on how you choose to engage with the content)	2hrs

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File import

Solidatus provides the capability to import data and to perform bulk data uploads in several ways, including file import (Figure 1). Many of our existing customers use this feature to upload metadata content that had previously been maintained in Excel. From the help menu, users can select an import template (Figure 2) which will aid in how to structure the data to be imported.
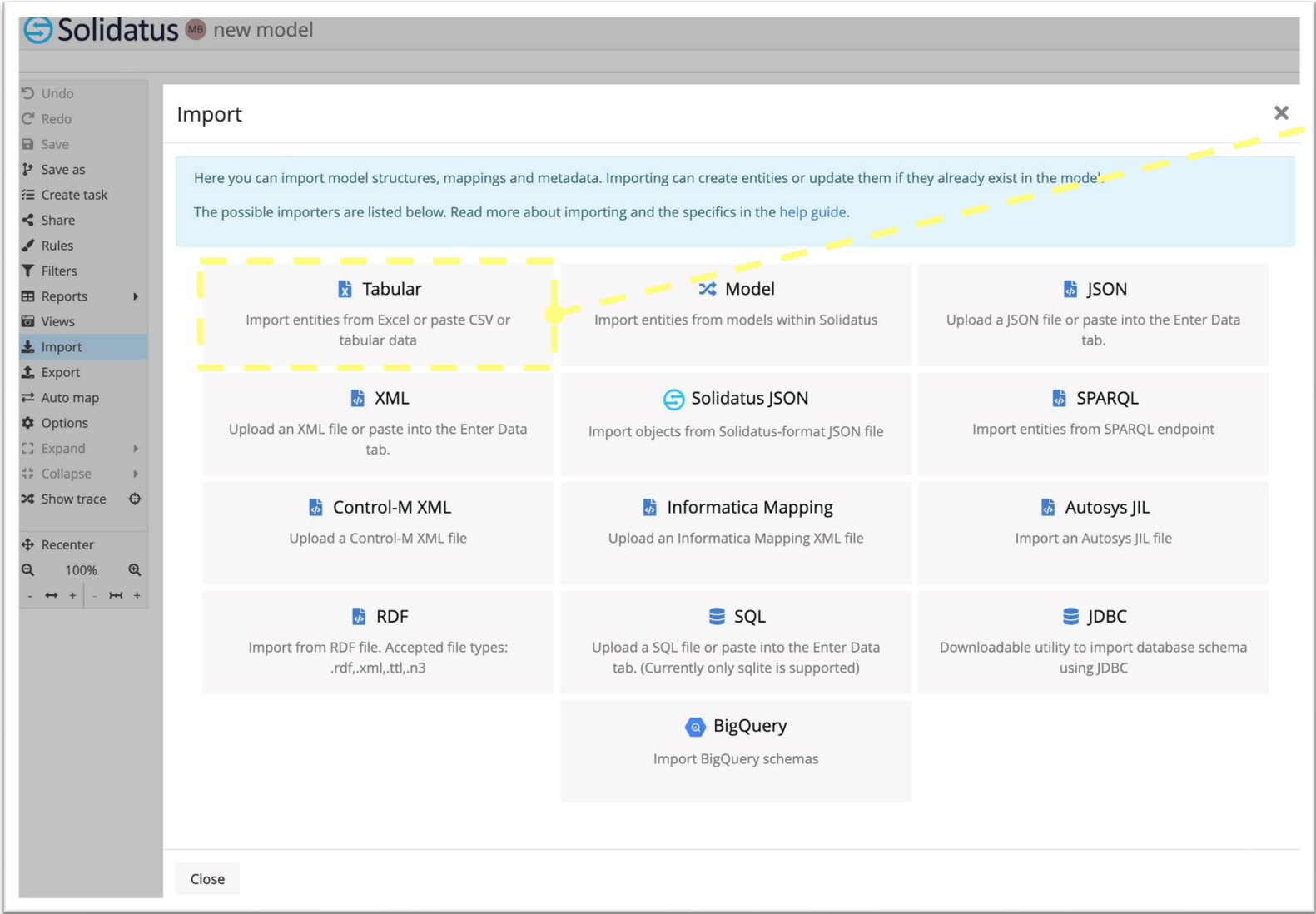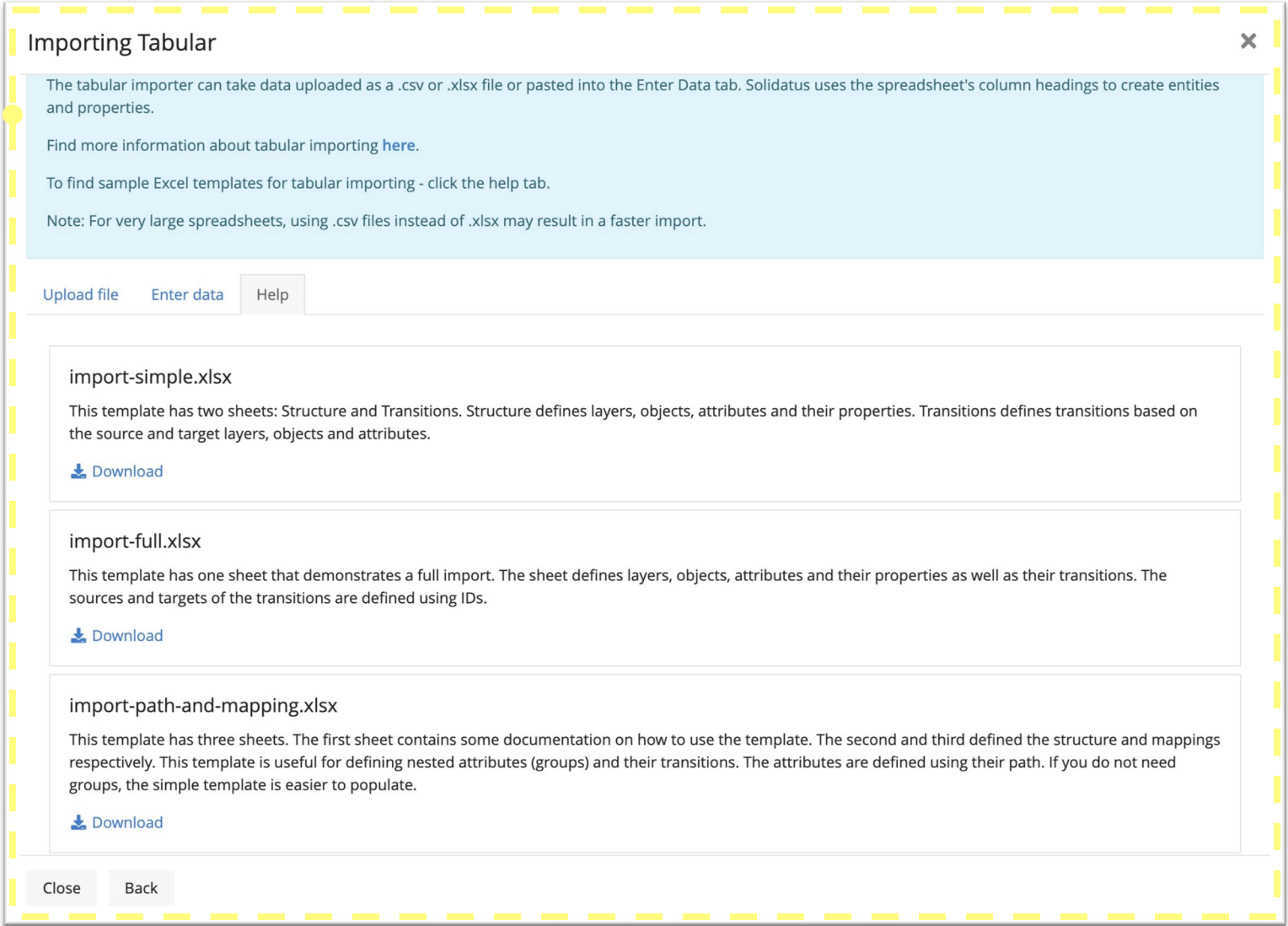
Figure 1

Figure 2

Upcoming product releases

Current projects

Templates

- Templates will guide users to create metadata artefacts against a common language and conforming to governed standards
- They will make Solidatus easier to use and make it harder to make mistakes with

Metrics dashboards

- Dashboards and charts to report on metadata capture and to track and demonstrate progress and completeness
- Distil the complexity of fine-grained metadata into digestible metrics to derive insight

Global search

- We are exposing the Solidatus graph through a simple search interface so more users can get the metadata and context they need without being data experts

Events platform

- Events functionality to expose metadata activity so users can configure their own alerts and integrations based on conditional triggers

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Thank you

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"Game changing"

With a trusted and holistic understanding of their data, organizations can automate process, reduce costs, mitigate risk, demonstrate regulatory compliance and eliminate data debt.

Solidatus