Master Data Management. Focused Demonstration Requirements

# introduction

Brit requires a modern RDM/MDM platform to meet current and emerging business goals:

* Move away from a legacy implementation of MDS with hundreds of versions of dozens of models. Used mainly to store Reference Data which is manually entered and consumed by data warehouses and several other systems via a cache database.
* Meet Reference and Party Master Data requirements of a modern Data platform architected in Azure as they are identified and prioritised.
* Introduce a domain-based reference and Party data model
  + Some Reference Data will be sourced externally for example, data exposed to the London Insurance Market via the Lloyd’s Insights Hub API
  + Party data will be enriched via verification against third party providers such as Dun and Bradstreet
* Facilitate strong data governance, data stewardship and data ownership, this will include integration with a Data Governance platform.
* Automate as many processes as possible
* Enable Brit resources to develop optimal data model and user experience.
  + Brit will be guided on the creation of optimal data models and user experience based upon the vendor / implementation partners knowledge of the platform and its requirements and capabilities.

There is a drive to have the MDM / RDM capability ready for initial use cases for the modern data platform so as not to incur technical debt caused by tactical solutions.

* Data will be added based on prioritised use cases, although seed data will be extracted from the current MDS environment, there will not be a wholesale migration of data from MDS to the strategic MDM platform.
* We will consider the structure and quality of data in the current data model and make any improvements required to optimise it in the new data model.

Initial use cases for RDM/MDM development to support the modern data platform are still being developed, however, we predict that the early requirements will not be highly complex, initially implementing a consolidated implementation style which will rapidly move into a coexistence style.

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| Platform Capability Requirements to be demonstrated | | | | |
|  | **Critical / Desirable** | **Category** | **Capability** | **Outcome** |
| 1 | Critical | Azure - Integration | Demonstrate full integration with Azure Data Factory | Demonstrate data integration in real-time and batch processes, ingestion from and provision to Azure Data Lake.  Brit is exploring the use of GraphQL for the consumption of data, demonstrate the platform’s capabilities with this technology. |
| 2 | Critical | Integration - Reporting | Integration with Power BI | Brits strategic BI tool is Power BI, the solution must integrate seamlessly |
| 3 | critical | Integration – Data Governance Tool | The tool must integrate with a Data Governance tool | Brit’s Data Governance tool of choice is yet to be determined however a test instance of Purview will likely be available during the initial stages of the programme at least.  The solution must be able to link to a Data Governance tool and consume/provide meta data such as definitions, ownership information, lineage, and any other relevant information |
| 4 | Critical | Security – User Access | Active Directory / Azure Active Directory | Demonstrate roll-based access to the solution down to attribute granularity using Active Directory / Azure Active Directory.  Support for single sign on |
| 5 | Critical | Source Data Load | Loading data from multiple business applications | Load data as-is with lineage information in both batch and real-time |
| 6 | Critical | Automated processing | Use of automated processes to standardise, verify and enrich data.  Identify data issues such as empty or malformed fields or duplication.  Generation of ‘Golden’ records | User interaction / manual processing to be kept to a minimum |
| 7 | Critical | Data Stewardship | Review of matched record groups, creation and management of records and relationships. | There will always be a requirement for users to review matching and creation of records.  The User Interface for all Data Stewardship operations must be clean and intuitive |
| 8 | Desirable | Data Stewardship | Visualisation and analysis | Data Stewards, Data Owners and solution administrators should have access to visual metrics on data quality, data volumes and data audit. |
| 9 | Desirable | Data Stewardship | Alternate hierarchical roll ups | Aggregate, roll-up or summarise nodes in a hierarchy that differs from the primary hierarchy, preserving the parent hierarchies’ parent-child relationships |
| 10 | Critical | Data Stewardship | Workflow | Demonstrate workflow(s) that inform stakeholders of change and request approval for change from a Data Owner – or Owners |
| 11 | Critical | Data Model | Historisation / Versioning | ‘Versions’ are heavily used in the current legacy MDS implementation.  Demonstrate the platforms capabilities to maintain an auditable record of changes over time.  Alternatives to MDS open, closed and committed versions of data model |
| 12 | Critical | Data Model | Use of data across domains | Data in one domain may have an association to data in another domain for example an entity in the Party Data Model will have an address in a Region / Country / Sub-country entity in the Reference Data Domain. |
| 13 | Critical | Data Model | Data Lifecycle | Data may have any number of constraints on the amount of time it can be retained. Demonstrate any rules that can be implemented to remove data if it reaches a defined end of life. |

## Focused demonstration data:

Internal Reference Data.

To ensure no confidential data is shared prematurely an extract of the publicly available Lloyd’s Risk Code dataset will be made available which can be treated as an internal reference data set for the purposes of demonstration.

Source file name: Risk code - Lloyds mappings and descriptions July 2021.xlsx

### External Reference Data.

Data from external sources is currently largely entered into MDS manually, where available via API from external sources such as the Lloyd’s Insights hub API we will aim to consume directly with no or minimal manual intervention. We recognise that to obtain API from the Insights Hub or the LIMOSS Market Business Glossary, an account is needed with LIMOSS that will not be available to a vendor, but an example of data being ingested from external source such as country or currency would be extremely beneficial.

An example of Country data available from the LIMOSS Market Business Glossary is provided: -

Source file name: Country - ISO 3166-1\_2013 - via LIMOSS MBG

### Party Data

Party Data is an increasingly likely requirement for implementation sooner rather than later, there are likely to be several party types implemented eventually including:

* Broker
* Reassured
* Reinsured
* Coverholder

Two Broker lists will be provided, one from the Lloyd’s insights Hub and the other from the LIMOSS Market Business Glossary to be treated as data sources, these list share common data but also have differences in the information they contain.

LIMOSS MBG source file name: Broker - Xchanging Data via LIMOSS MBG

Lloyd’s Insights Hub source file name: Broker - Lloyds Insights Hub