

# Phoenix Rising: It was a dark and stormy night...

Amy Pfaff, TIAA-CREF; Charlie Bach, TIAA-CREF




## TIAA-CREF



### Phoenix Rising: It was a Dark and Stormy Night....

### Adventures in Metadata Repository Implementations



## Introduction

- **Amy Pfaff, Senior Database Administrator at TIAA-CREF.**


Oracle DBA for 10 years, 20 years of overall IT Experience.  
Currently the Project Lead for the Data Management Initiative. Amy has done just about every job in IT including Help Desk, database programming, database analysis and design, pulling coax cable, fixed printers and pinning connectors. She has been at this meta data game now for just a couple of years, but her co-workers say she is coming along quite nicely, even for an Oracle DBA type. Amy also plays a darn good flute (classically trained flautist).
- **Charles Bach, Senior Database Administrator at TIAA-CREF.**

Charlie has worked in the IT arena for over 30 years, starting with GEICO in 1972 where he specialized in systems/data analysis, data modeling, data base design, enterprise architecture, and data administration. He then switched over to the software vendor side of the industry in 1982. After working for over 22 years for the vendors of the DATAMANAGER and Rochade meta data repositories, Charlie worked a couple of crazy years independently as a contractor around support for Rochade. In August 2005 he settled down to a real job working for TIAA-CREF as a real employee in support of their Data Management Initiatives and The Flute Lady. Working in this industry for so long can lead to some serious wear and tear on a person, anyone needing advice on body part replacements, feel free to contact our "Bionic Dude" (SoCal twist of course).

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The DAMA International Symposium & WILSHIRE Meta-Data Conference  
Denver, Colorado ● April 23-27, 2006

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## Original Hopes and Dreams


In 2004, we began our quest for making sense of the different sources of information by using a metadata repository.

Like many companies our intellectual knowledge was stored in people's heads and documentation was difficult to put our hands on.

Most metadata was tracked in spreadsheets across the enterprise each with it's own version of the "truth".

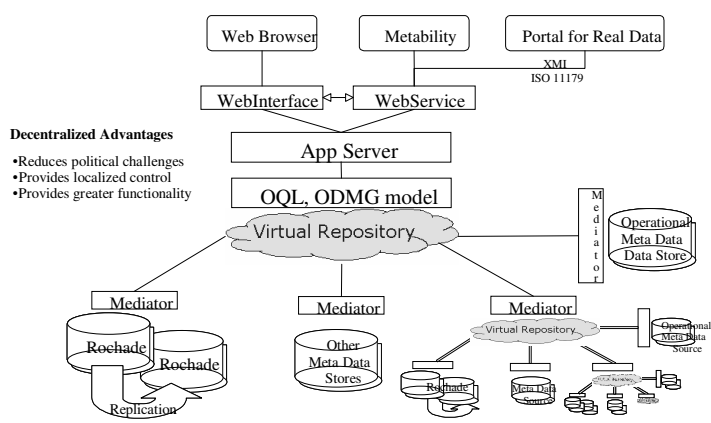


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## The Ultimate Dream...

The Vision



**Decentralized Advantages**

- Reduces political challenges
- Provides localized control
- Provides greater functionality

### Virtual/Federated Repository Approach

**The new Rochade architecture consists of:**

- Database server layer,
- Application server layer, and
- User interface layer

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## The Dream Team

- The dream team was formed including our project Leader, Vernon Chin. In addition, we had experts come in to help.
- Evaluation of tools was done and a tool selected. We elected to use ASG Rochade as our metadata repository.
- “Road Shows” were scheduled to sell the concept to the Business.
- Our time line for implementation included a “quick win” project dealing with configuration management.
- Our goal was to demonstrate the power of the metadata repository with this project and expand on this knowledge moving forward.

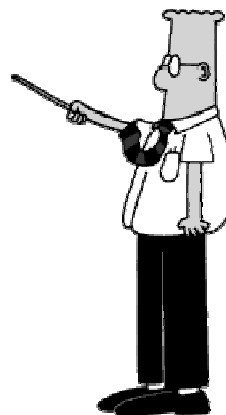
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## Lessons Learned....

While the project was considered a success, we had much to learn:


- Lack of automation with data collection meant that data became stale very quickly in our environment and we couldn't keep up with the changes.
- Verifying the correctness of data was very time-consuming.
- Needed more buy-in from executive management.



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## Problems Arise...

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- Budget should be a four letter word....
- For the 2005 budget, we worked with a business team as part of their project request for data quality. This project was cut and it wasn't clear until much later that our budget was cut as well. By then, there was nothing we could do.
- Poor Marketing. No one knew who we were and what we did. There was a lack of understanding of the importance of metadata management for the enterprise. This made it difficult to get funding.

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## Problems arise...

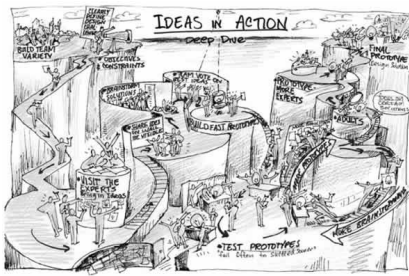
- Loss of a project leader, death of a friend. We lost Vernon in February 2005.
- Over the next month, the team drifted apart. Contractors took other contracts and the project floundered.
- The project was losing momentum.....

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**New Focus**





Build it, they may come

But only if you tell them

- 2005 became the foundation building year:
  - All production databases had data dictionaries scanned in. We automated this as much as possible to keep up with the changes taking place.
  - We utilized the tool for our own purposes: tracking our database inventory, patch sets and security information. We started using the tool for other information around databases like server information and application information.

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**New Focus**




In only a few months, we...

- Hired a subject matter expert and a data modeler/trainer.
- Were able to use the repository to answer questions from developers, business analysts and IT management.
- Targeted groups with projects that could benefit from the information we had gathered.
- Established data governance around the data we had collected.
- Created a repeatable process that could be used with each project.

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## What would life be without Challenges?



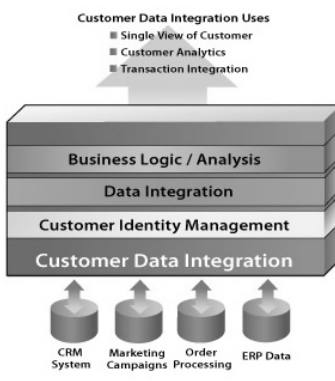
- Politics. Knowing who to talk to and when became key. It was a challenge to keep up with the players.
- No magic pill (or magic software package) to solve our data issues. What is it about a magic solution that you buy and things just magically get fixed?
- The budgeting shell game. When it came to the 2006 budgeting process, we hedged our bets by getting included in several projects on the books with the hope that one of them would come through.

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## New Year -- 2006

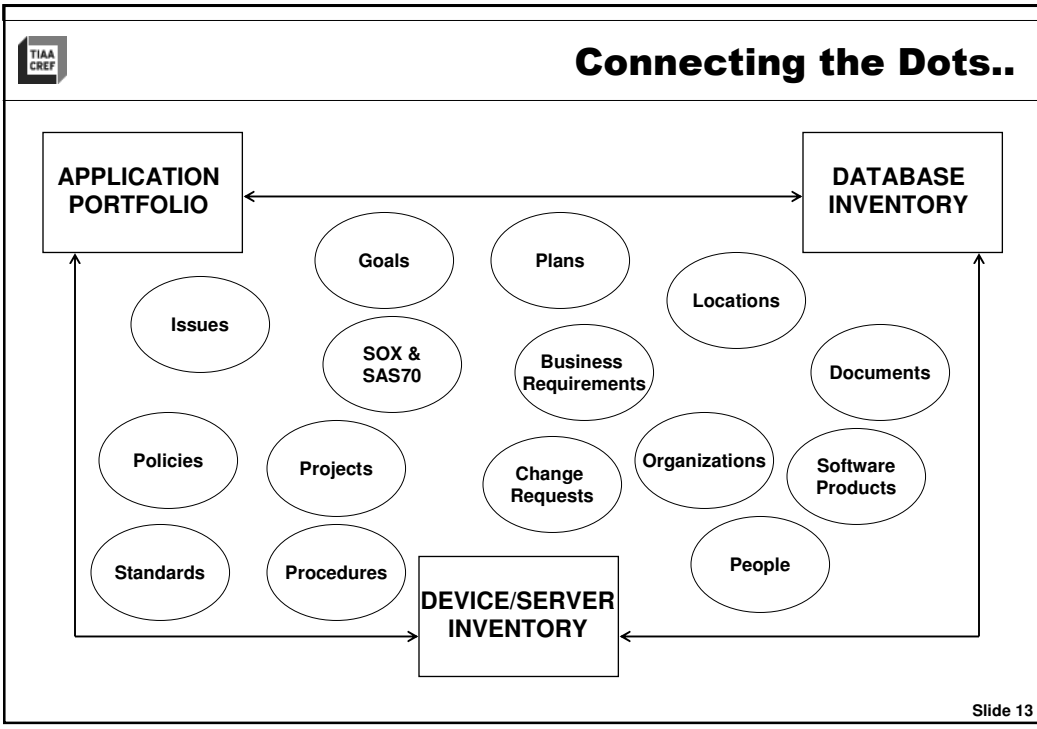
- New focus is being put on data management initiatives within the business as well as the industry.
- These initiatives are becoming part of doing business. We are constantly looking to improve data quality, data redundancy and our metadata repository is a key tool in this effort.
- We are getting involved at the beginning of projects, rather than in the middle, or after the fact. This pulls in more metadata building on the foundation as well as building the user community.
- We are focusing on SOX Compliance documentation.



Make yourself indispensable

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- 
- We are we going from here....**
- Continue to connect the dots .....
- Business Process documentation
  - Application documentation
  - Project information
  - Standards and Policies
  - Compliance documentation
  - Software development lifecycle support
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**Questions**

ARE THERE ANY QUESTIONS?

DO YOU EVER FEEL ALONE WHEN YOU'RE WITH PEOPLE?

I TRY TO.

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