Quality By Design:
Event Management “The Next Generation”

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Andres Perez is an Information Resource Management Consultant and President of IRM Consulting, Ltd. Co., based in San Antonio, Texas. Mr. Pérez specializes in information resource management, information architecture and information quality management.

He provides consulting in the disciplines of:
- Program and Project Management
- Information Quality Management (TIQM® Certified)
- Enterprise Information Resource Management (Information Stewardship, Information Administration, Metadata Repository and Management
- Information Architecture (Modeling, Design, Standardization, Profiling, Reverse Engineering, Movement, and Integration (Enterprise Information Modeling, ETL and EAI)
- Information Integrity audits (COBIT), Analytical Solutions (Business Intelligence, Data Warehousing, ODS, Data Marts), Customer Relationship Management and other Large Operational Solutions (OLTP)

He conceived and implemented an information management program called "Data Certification."

Mr. Pérez is a well known speaker at data management and information quality conferences in the US and Europe including DAMA International, Information Quality, ZIFA (Zachman Institute for Framework Advancement) and IAA (Insurance Application Architecture). His presentations encompass information resource management, information stewardship, information quality management, and enterprise information architecture.

He is the VP of Marketing for DAMA International, past member of the Board of Directors for the IAIDQ, past President of the Heart of Texas DAMA Chapter, past member of the IAA Board of Directors, and past member of the Object Management Group.

Mr. Perez is a certified TIQM® consultant and has a BS in Mechanical Engineering and Business Administration from the Universidad Autónoma de Nuevo León, Monterrey, México.

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**Agenda**

- The Business Case for Event Management
- Data Movement Principles
- Event Management & Process Improvement
- Understanding Information Needs
- Data Movement & Event Design Considerations
- Event & Process Management Design Considerations
- Q&A

**QBD: Event Management 2**

- $24 Billion spent annually to integrate enterprise applications —Standish Group

**QBD: Event Management 3**

- "GartnerGroup estimates that as much as 30 percent of the costs associated with implementing a major packaged application will be consumed by the development of point-to-point application interfaces. An even higher percentage is spent on ongoing maintenance of these interfaces."
  —Gartner Group

**QBD: Event Management 4**

- Average Global 2000 company relies on 49 enterprise applications, spends 25% to 35% of IT budget on integration —META Group

- Enterprises today and tomorrow will require a far higher degree of integration... to shift gears more rapidly, to change competitive formulas, and to re-organize more quickly than ever before. —Forbes

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Data Movement Principles
The Data Movement Lighthouse

"From the errors of others, a wise man corrects his own."

Publilius Syrus,
Circa First Century, B.C.

First: Avoid Data Movement

➢ Don’t Do It!!!
  ● It adds cost
  ● Reduces semantic value
  ● Increases information float
  ● Introduces opportunity for quality defects

➢ “The goal of Information Management is to avoid and eliminate unnecessary data movement by providing well defined enterprise information models and well implemented enterprise-strength databases that meet the information, accessibility and performance needs of all stakeholders”

-- Larry English
Second: Apply Data Movement For Value-Add

- Use Data Movement to:
  - Bring information from, or send information to, outside data producers or consumers
  - Move from the official record-of-origin to the official record-of-reference data store
  - Move from the official record-of-reference data store to an application software package database and back
  - Move from an enterprise record-of-reference data store to the analytic or strategic (operational data store or data warehouse) database
  - Move data as a one time conversion from a legacy data store to the newly architected data store.

Adapted from L. P. English's *Increasing Business Information and Data Warehouse Quality*
Fourth: Capture Information About Defects & Events

- Monitor Data Movement Processes
  - Identify all non-compliance conditions
  - Record relevant conditions (e.g., "all A/P transactions must have a valid vendor")
  - Record relevant data corrections (e.g., "if the service date is invalid, set to the accounting date and issue an event notification")
  - Maintain records for as long as it is relevant to the customer
  - Provide reporting for SPC analysis

Applying Event Management to Process Improvement

"Speak with data"

-- Dr. Kaoru Ishikawa
"Dashboard" vs. Statistical Process Control

- The "green," "yellow" and "red" concept applies to linear control (e.g., "stop and go")
- Not all Information Quality issues are linear:
  - Tolerance ("GO") Depends on Business Impact
  - Acceptable to some is unacceptable to others
- Critical Considerations:
  - The threshold is usually not the same for all application of the information
  - Who Determines the thresholds? (e.g., "Is 10% defective OK?")
  - Do you know the business impact across the value chain?
- Information Quality Cost Drivers:
  - Defect detection = Inspection
  - Defect correction = Rework
  - Defect rejection = Scrap
  - Defect prevention = Process Improvement
- Process Improvement requires KNOWLEDGE of the business impact and ROOT CAUSES for defects

"The central problem in management and in leadership is failure to understand the information in variation." – W. E. Deming

Pareto Analysis (Illustration Only)
**Observations:**

- Server was experiencing "some" issues with defective back-ups.
- The client upgraded the Tape Drivers but was not sure if more action was required.
- The analysis showed that the process capacity for defective back-ups was reduced from 6 per week to 1.

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**1407 - Invoice Date Prior to Service Date**

(Before Improvement)

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**Week (Friday Date Shown)**

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**UCL**

**LCL**

**AVG**

**ACTUAL**
### Reports: Detail (Small Sample)

<table>
<thead>
<tr>
<th>Event ID</th>
<th>Event Description</th>
<th>Event Value ID</th>
<th>Process</th>
<th>Action</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1407</td>
<td>Invoice Date Prior to Service Date</td>
<td>PIB9314-0824</td>
<td>93327</td>
<td>CORRECTED TO DEFAULT</td>
<td>11/6/2007</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PIB95007-0923</td>
<td>90011</td>
<td>CORRECTED TO DEFAULT</td>
<td>11/6/2007</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PIB9514-0797</td>
<td>86891</td>
<td>CORRECTED TO DEFAULT</td>
<td>11/6/2007</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PIB9514-0797</td>
<td>86891</td>
<td>CORRECTED TO DEFAULT</td>
<td>11/6/2007</td>
</tr>
</tbody>
</table>

Source: adapted from the Production Log

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### 1407 - Invoice Date Prior to Service Date (Split UCL/LCL)

![Graph](image-url)

Source: adapted from the Production Log
1407 – Invoice Date Prior to Service Date (After Improvement)

Requirements Gathering & Information Specification

“Quality is what the customer says it is.”

--Armand Feigenbaum
Sample: Inconsistent Business Meaning

Financial Institution Real Life Situation

- **Documented definitions:**
  - 316 Customer identifiers
  - 167 Policy identifiers
  - 731 Location Identifiers
  - 148 Lines of business Identifiers
  - 47 Claim identifiers

Operational Definitions:
Achieving Effective Communication

"All linguistic representations discard most of reality: just like the map is not the territory, the word is not the thing defined."

- Alfred Korzybski’s General Semantics

"The purpose of operational definitions is to provide the worker with a clear understanding of what kind of work is acceptable and what kind of work is unacceptable thus enabling an operation to produce consistent results."

- W. E. Deming
Operational Definitions

- **Observations:**
  - Without operational definition, a specification is meaningless.
  - In industry, there is nothing more important for the transaction of business than the use of an operational definition (some are called standards).
  - The only communicable meaning of any word, prescription, instruction, specification, measure, attribute, regulation, law, system, or edict is the record of what happens on application of a specified operation or test.
  - The dictionary provides a concept, not an operational definition to use in industry.

- **Test:** explain what measurements to make and what criterion to adopt to decide whether something is conforming to a definition.

Source: Out of the Crisis, W. E. Deming

Information Customer-Supplier Relationship

- **Conformance to Specifications:**
  - Actual Definition & Architecture
  - Measures of Quality

- **Information Warranty:**
  - Based on the Quality of the Actual Product

- **Specification Requirements & Feedback:**
  - Operational Definition (Function & Need)
  - Measurable
  - Realistic/Obtainable (with Current Technology)
  - Forecasts (quantity, timing, special instructions)
  - Satisfaction, Comments

Information Warranty: Based on the Quality of the Actual Product

Supplier (Information Producer)

Customer (Information Consumer)
Data Movement & Event Design Considerations

"Begin with the end in mind."

-- Steven Covey

Data Movement Design Guidance

- Begin With the End in Mind
  - Design "Backwards" - from Target to Source
  - Ensure correctness from source to target
  - Reiterate until no design issues are identified

- Use Software Design Principles
  - Coupling: the degree of inter-dependence of a software component on the external environment (best: data coupling)
  - Cohesion: the degree of inter-dependence of the functions within a software component (best = functional cohesion)

- Design for Performance
  - Understand the target volume - Design It In!
Data Movement General Design

Design Process Flow

- Source A
- Source B
- Source C
- Source D
- Source E
- Source F
- ...

Pre-Existing Flows

Staging

Conformed Dimensions

New Flows

Target Data Mart

Data Flow

Pre-Existing Flows

New Flows

Source 1

Source 2

Source 3

Source 4

Staging

Conformed Dimensions

Target Data Mart

New Flows

Design Iteration(s)

Sample Data Movement
Identifying Events

- Identify all "Negative" Conditions (Invalid Data or Process Breakdowns)
- If a condition is handled by an enforced database constraint ensure the process fails (e.g., "if the account is not in the account table, abort the process; contact on-call personnel for immediate action")
- If the condition has potential for occurring:
  - If the condition is not relevant do not record the event (e.g., "if the G/L transaction is not A/P, correct to default, do not record event")
  - Identify the condition ("service date must be valid for all A/P transactions") [event type: invalid value]
  - Identify the impact ("missing or invalid dates will impede service expense analysis") [event severity: warning]
  - Identify the action (in all A/P cases: record the event and then e.g., "correct to accounting date") [event action: correct to default]
  - Identify the interested parties ("notify the accounting department") [event notification: accounting]
Identifying Events - Example (1/2)

- General Ledger transactions have a “service date” to capture when the service associated with the expense was provided
  - Stored in three columns (year, month and day); not in “date type” format
  - Missing (represented by zeros at the source) or invalid (e.g., valid year and month but “zero” day) in a very large number of transactions
  - Some are very relevant: when G/L transactions are for a vendor provided service or product
  - Most are not relevant at all: when G/L transactions are not related to a service (e.g., royalty payouts)

- Conducted a profile of one month worth of transactions (15 MM+)
  - 52.7% had missing/invalid dates (over 8 million)
  - The bulk of these transactions were “not requiring service date”
  - 1,439 transactions were classified as “requiring service date but having a defective date”

Identifying Events - Example (2/2)

- Service Date “Event Generation”
  - When the service date is present and valid, create the target “service date”
  - Otherwise
    - When the service year and month are present and valid but the day is not present or invalid, set the target “service date” to the year-month (no “day”)
    - Otherwise, set their target service year-month to the accounting date (no “day”)
    - For transactions not requiring service dates (Account Numbers 100s and 300s)
      - Do not generate an event
    - For transactions requiring a service date (All Others)
      - Generate an event (report the incident)
Identifying Event Type

- Duplicate Entry (two records are present with same identifier)
- Invalid Value (invalid data type, invalid domain, et al)
- Key Not Found (failed referential integrity)
- Source Data Not Found (missing incoming file)
- Source Entry Not Found (missing incoming record)
- Out of Balance (failed reconciliation)
- Process Begins (information only; process monitoring)
- Process Ends (information only; process monitoring)

Identifying Event Action

- Inform (e.g., "if the transaction is for A/P, notify the accounting department")
- Correct to a default (e.g., "set service date to the accounting date and notify the accounting department")
- Discard the record (e.g., "if the lease number is not in the lease table, reject the record, and notify the lease operations department")
- Stop processing (e.g., "if the incoming file is missing or empty abort the process; contact on-call personnel for immediate action")
## Sample Data Movement Specification

<table>
<thead>
<tr>
<th>Type of Change</th>
<th>New</th>
<th>Load Strategy:</th>
<th>Truncate &amp; Insert</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source File:</td>
<td>PLNPRDTRNF</td>
<td>Target Table:</td>
<td>Product Transfer</td>
</tr>
<tr>
<td>References:</td>
<td>Product Dimension, Location Dimension, ...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule:</td>
<td>Sunday Night</td>
<td>Volumetric:</td>
<td>270,984/wk</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Processing Consideration</th>
<th>Specification</th>
<th>Validation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filter</td>
<td>Exclude rows with Company = 'OTH'</td>
<td>None</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Target Columns</th>
<th>Source Columns</th>
<th>Transformation Specification</th>
<th>Validation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Key</td>
<td>SRCMTRC107:</td>
<td>Set to the Key in Product</td>
<td>Must be in Product (1148);</td>
</tr>
<tr>
<td></td>
<td>Item Code</td>
<td>for matching Item to Product Code and Brand Code.</td>
<td>ID = Item ID, Date: Value = Item Code.</td>
</tr>
<tr>
<td></td>
<td>Product Code</td>
<td>Item is structured as follows:</td>
<td>If not, produce error report and discard the record</td>
</tr>
<tr>
<td></td>
<td>Brand Code</td>
<td>&quot;P&quot; (constant)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Product Key</td>
<td>6 digits numeric</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Product Code)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>&quot;B&quot; (constant)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4 digits numeric (Brand Code)</td>
<td></td>
</tr>
</tbody>
</table>

| SRCMTRC107:   | Product Code  | 1 |
| Item Code     | Brand Code    | 2 |
| Product Key   |               | 3 |

### Functional Design:

**Event & Process Management**

Enabling Defect Detection, Correction & Process Controls
F1.2 Steward (Access Privileges)

A person assigned stewardship by the registrant for development and maintenance of processes and data containers and related events.

When a steward creates a new process or data container, the identifier of the associated registrant will be included in such registration. Stewards can change their association with the registrant, but objects once created remain with the original registrant.

Example:

Attributes:
- Identifier
- LDAP identifier
- Name
- Access Type
- Registrant Name
- Assignments (Attributes, Data Elements, Information Quality Agreements, and IQM Roles)
- Notifications
- Audit Trails (Created by & date; Modified by & date)
F1.2 Manage Stewards

- F1.2.1 Register Steward
- F1.2.2 Assign IQM Role
- F1.2.3 Assign Attribute Steward
- F1.2.4 Assign Data Element Steward
- F1.2.5 Assign IQA Steward
- F1.2.6 Event Notification Recipient
- F1.2.7 Steward “Pop-Up”

F1.3 Register Event Notifications

Event Notification

An Event Notification identifies the person or distribution list that will be notified when an associated event takes place.

Example:
- G/L Transactions: notifies all personnel interested in defects occurring to G/L Transactions

Attributes:
- Identifier
- Description
- List of event registrations:
  - Event Registration Identifier
  - Event Message
- List of recipients:
  - Steward Identifier
  - Notify Method Identifier
  - Notify Report Identifier
F1.5 Register Objects

F1.5.1 Register Data Container
F1.5.2 Register Process
F1.5.3 Register Event
F1.5.4 Register Job Group
F1.5.5 Register Business Objective
F1.5.6 Register CSF*
F1.5.7 Register IQA*
F1.5.8 Register Attribute
F1.5.9 Register IQM* Activity

Designer / Developer
Information Steward

Event & Process Management

Data Container Details
Process Details
Event Details
Job Group Details
Bus. Obj. Details
CSF Details
IQA Details
Attribute Details
IQM Activity Details

F1.5 Object Registration Menu

Data Containers
Processes
Events
Job Groups

Business Objectives
Critical Success Factors
Attributes
Information Quality Agreements
IQM* Activity

*CSF: Critical Success Factor
IQA: Information Quality Agreement
IQM: Information Quality Management
F1.5.1 Register Data Containers

A file or database table registered in the ABC database that contains one or more data elements.

Examples:
- A file (e.g., PLNPRDTRNF)
- A database table (e.g., FINANCIAL_ACCOUNT)
- A database view (e.g., GL_MONTHLY_SUMM)
- A Message (XML, RPC, etc.)

Attributes:
- Identifier
- Registrant
- Name
- Description
- Location
- Type
- Primary Identifier
- Label

List of Data Elements:
- Name or Title
- Description
- Type
- Critical Indicator
- Status
- Assigned Steward
- Assignment Date

F1.5.2 Register Processes (1/2)

A program or software component that performs a defined set of activities as prescribed by its code or structure.

A process is registered when it is expected to produce registered events.

Examples:
- Scheduler Step
- Informatica Work-Flow
- Java Program
- Delivery of Daily Completion Production (Oil & Gas)

Attributes:
- Identifier
- Registrant
- Name
- Description
- Specification (document)
- Environment
- Frequency
- Category (e.g., Business Process, Informatica Session)
- Processing Context (e.g., Development Production)
F1.5.2 Register Processes (2/2)

- List of Critical Success Factors:
  - Identifier
  - Description
  - Status

- List of Critical Data Elements:
  - Data Container Identifier
  - Data Element Identifier
  - Data Element Name

- List of Information Quality Agreements:
  - Identifier
  - Name

- List of Sub-Processes:
  - Sub-Process Identifier

- List of Parameters:
  - Name
  - Description

- List of Events:
  - Registration Identifier
  - Message Description

- List of Job Groups:
  - Identifier
  - Description

- List of Business Process Roles:
  - Identifier
  - Description

- List of Sub-Processes:
  - Sub-Process Identifier

- List of Parameters:
  - Name
  - Description

- List of Events:
  - Registration Identifier
  - Message Description

- List of Job Groups:
  - Identifier
  - Description

- List of Business Process Roles:
  - Identifier
  - Description

F1.5.2 Register Processes

- F1.5.2.1 Register Process Details
- F1.5.2.2 Register Derivation Details
- F1.5.2.3 Register Validation Details
- F1.5.2.4 No Rollback Parameters
- F1.5.2.5 Back-Slam Parameters
- F1.5.2.6 Promote Parameters
- F1.5.2.7 Promotion Request

Designer / Developer / Steward
Coordinator
F1.5.4 Register Job Group

A set of specifications (e.g., file name and location) and a defined set of processes (Informatica Workflows and/or Sessions) grouped together to enable the Parameter File Generator function to know the processes and parameters to include in the generated parameter file (or files).

Example:

- One execution of the Parameter File Generator function may create one file per Informatica Workflow to use for the nightly data warehousing processes

Attributes:

- Name
- Registrant
- Description
- List of Processing Contexts:
  - File Name
  - File Location
  - File Generation Code (by workflow)

F1.5.5 Register Business Objectives (1/2)

States specific targets the organization plans to achieve to realize its mission.

Can be set at two levels:

- Corporate: concern the business or organization as a whole
- Functional: concern a function (e.g., marketing) or division (e.g., Gulf); result from the corporate business objectives as applied to the function

Must conform to the SMART criteria:

- Specific: state exactly what is to be achieved
- Measurable: it is possible to determine whether (or how far) it has been achieved
- Achievable: realistic considering circumstances and resources
- Relevant: to the people responsible for achieving them
- Time Bound: set with a time-frame in mind

Example:

- Optimize production resulting in increased revenues
F1.5.5 Register Business Objectives (2/2)

<table>
<thead>
<tr>
<th>Business Objective</th>
<th>Attributes:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Identifier</td>
</tr>
<tr>
<td></td>
<td>• Description</td>
</tr>
<tr>
<td></td>
<td>• Status</td>
</tr>
<tr>
<td></td>
<td>• Parent Objective Identifier &amp; Description</td>
</tr>
<tr>
<td></td>
<td>• List of Sub-Objectives:</td>
</tr>
<tr>
<td></td>
<td>• Identifier</td>
</tr>
<tr>
<td></td>
<td>• Description</td>
</tr>
<tr>
<td></td>
<td>• List of Critical Success Factors:</td>
</tr>
<tr>
<td></td>
<td>• Identifier</td>
</tr>
<tr>
<td></td>
<td>• Description</td>
</tr>
<tr>
<td></td>
<td>• Contribution to Business Objective</td>
</tr>
</tbody>
</table>

F1.5.6 Register CSFs (1/2)

Critical Success Factor

An essential area of activity that must be performed well if the organization is to achieve its mission, objectives or goals.

These are:

• The areas where results will ensure successful competitive performance for the organization
• The areas that must go right for the business to flourish
• Lack of adequate results will make the organization's efforts less than desired
• The areas that should receive constant and careful attention from management

Examples:

• Track daily completion production
• Track monthly completion production
• Delivery of daily completion downtime hours and reasons in a timely and accurate manner
**F1.5.6 Register CSFs (2/2)**

**Attributes:**
- Identifier
- Description
- Status
- Parent CSF Identifier & Description
- List of Sub-CSFs:
  - Identifier
  - Description
- List of Contributing Business Processes:
  - Identifier
  - Description

**List of Business Objectives:**
- Identifier
- Description
- Contribution to Business Objective

---

**F1.5.7 Register Attributes**

**Attribute**

An inherent property, characteristic, or fact that describes an entity or object. A fact that has the same format, interpretation, and domain for all occurrences of an entity type. An attribute is a conceptual representation of a type of fact that is implemented as a field in a record or data element in a database file.

Examples:
- Product Identifier
- Person Date Of Birth

**Attributes:**
- Identifier
- Name
- Definition
- Domain
- Description
- Status
- Steward
- Steward Assigned Date
- IVC Document (Hot Link)

**List of Data Elements:**
- Name or Title
- Description
- Type
- Critical Indicator
- Status
- Assigned Steward
- Assignment Date
### F1.5.8 Register IQAs*

**Information Quality Agreement**

A statement of the functional specification of the quality of a critical data element as agreed to by the producer of said data element. An SLA is a business rule stating the valid values the critical data element will contain.

**Examples:**
- "The service date must not be null"
- "The daily completion gas volume must be zero when the down time is 24 hours"

**Attributes:**
- Identifier
- Description
- Quality Specification
- Status
- Assigned Steward
- Assigned Date
- List of Parties:
  - Identifier
  - Description
  - Producer/Consumer

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Description</th>
<th>Quality Specification</th>
<th>Status</th>
<th>Assigned Steward</th>
<th>Assigned Date</th>
</tr>
</thead>
</table>

| List of Control Processes (implementation):
- Identifier
- Description
- Control Type |

| List of Data Elements:
- Name or Title
- Description
- Type
- Status
- Assigned Steward |

### F1.5.9 Register IQM Activities

**IQM Activity**

A type of Information Quality Management (IQM) activity that can be conducted as part of an IQM Project. An IQM Activity can be composed of one or more IQM Tasks.

**Example:**
- Identify Business Objective

**Attributes:**
- Identifier
- Name
- Description
- Order
- Overview
- Entrance Checklist
- Exit Checklist

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Name</th>
<th>Description</th>
<th>Order</th>
<th>Overview</th>
<th>Entrance Checklist</th>
<th>Exit Checklist</th>
</tr>
</thead>
</table>

**List of Tasks:**
- Identifier
- Name
- Description
- Warnings
- Examples
- Templates
- Order
- Deliverable
- Work Content (e.g., number of hours/days/etc.)
A planned set of activities of the IQM Program with the express objective to improve business effectiveness through improved information quality. It is composed of one or more activities and each activity is composed of one or more tasks.

Example:
- "Improve Well Operational Effectiveness by reducing rework by production and reservoir engineers"

Attributes:
- Identifier
- Title
- Description
- Steward
- Status
- Start/End Dates
- Percent Complete (derived)

List of Activities:
- Order (revised)
- Identifier
- Status
- Start/End Dates
- Notes

List of Tasks:
- Order (Revised)
- Identifier
- Status
- Start/End Dates
- Notes
- Deliverable (Action)

F1.6 Register IQM Projects

IQM: Information Quality Management

F1.6 Manage IQM Project
F3.2 Event Notification

Issues event notifications to the recipients for all logged events since the last time they were notified.

Characteristics:
- Usually a batch process executed once per business day (e.g., executed Monday-Friday at 6:30 am CST)
- Issues one e-mail (or text message, or voice message) for each recipient indicating the number of events logged relevant to the party
- The message provides the recipient with a link to the report (selected by the recipient) were the recipient can see the contents of the event log
F5 IQM Work Management

Proposed Objects

Notify

F5.1 Proposed Objects Notification

Pending Objects

F5.2 Pending Objects Notification

Ready to Archive Objects

Update Status to "Archived"

F5.4 Object Archive

Remove Obsolete Objects

F5.5 Object Purge

Changed Status to "Rejected"

F5.3 Rejected Object Notification

Notify Assignee

Notify Proponent

Information Steward

Event & Process Management

Proposed

F5.1

Pending

F5.2

Rejected

F5.3

Object Archive

F5.4

Object Purge

F5.5

Questions!

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