

Oracle Financial Services Accounting Foundation Cloud Service

Data Catalog

Release 22A

February 2022

ORACLE®
Financial Services

Oracle Financial Services AFCS Data Catalog

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Document Control

This section lists all the details of document control:

Table 1: Document Control

Version	Revision Date	Change Log
1.0	February 2022	Created the OFS AFCS Data Catalog for the Release 22A.

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1 Data Catalog Overview

Data Catalog is the logical representation of the underlying Data Model, which is contextualized by the Metadata to enable a better understanding of the Data Model and the enterprise-wide data. For example, understanding the End of Period Book Balance in the context of Loans and Securities may require two definitions of the term in discovering. A further analysis of the Metadata helps discovering, the sources, current business uses of the element, validation checks, and any privacy aspects.

The Data Catalog comprises of elements called Business Terms supporting business needs of the Banking and Financial Services Industry across the Finance, Risk, and Regulatory Compliance Functions. Data Catalog includes sourced, calculated, and master elements. Elements that require conformation to the standards will have a list of expected values. A combination of Business Terms and Entities form the underlying Data Model. The search capability allows you to explore data by different dimensions.

The Data Catalog helps you understand the business relevance of an Element and the associated Data Definition, grain through Entities and Subject Areas. You can group the Data Catalog by Subject Area and this subset is narrowed down to a business use case (For example, Basel Credit Risk).

In a multi-domain Data Catalog environment, you need to select the required Financial Domain that filters the Subject Areas relevant to the selected Domain or Service, Entities under the Subject Area, and Elements mapped to the Entities.

The Data Catalog is the gateway to create, view, or manage the physical instance of the Data Model.

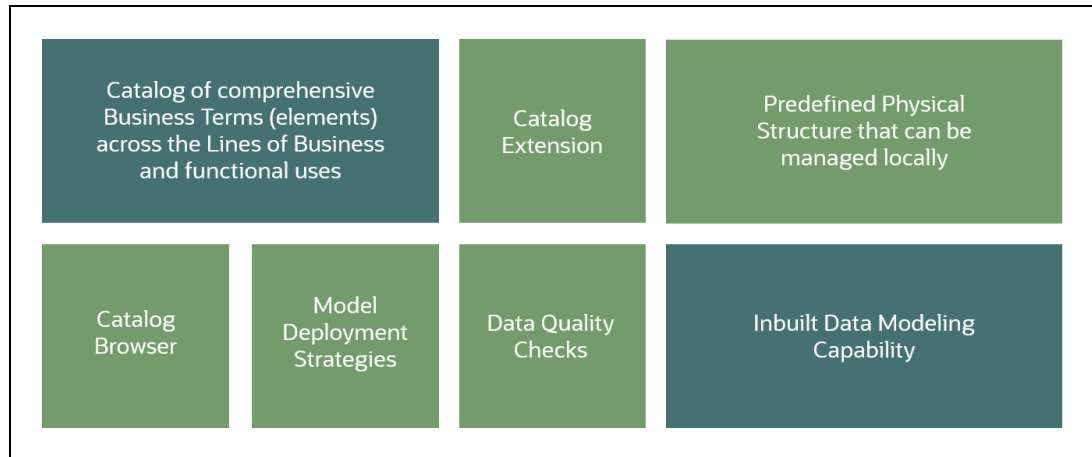
You can use out-of-the-box define Pipelines (table to table process, Connector) to load data into the Entity, and execute and manage the Process.

The fundamental objectives of the Data Catalog are as follows:

- To provide a unified logical view of the Enterprise Data Model.
- To enable data discovery using predefined Metadata that is modifiable by Users.
- To support end-to-end data lineage as it connects data sources and uses.

1.1 Data Catalog Key Capabilities

This Section provides information about the key capabilities of the Data Catalog.

Figure: Data Catalog Key Capabilities

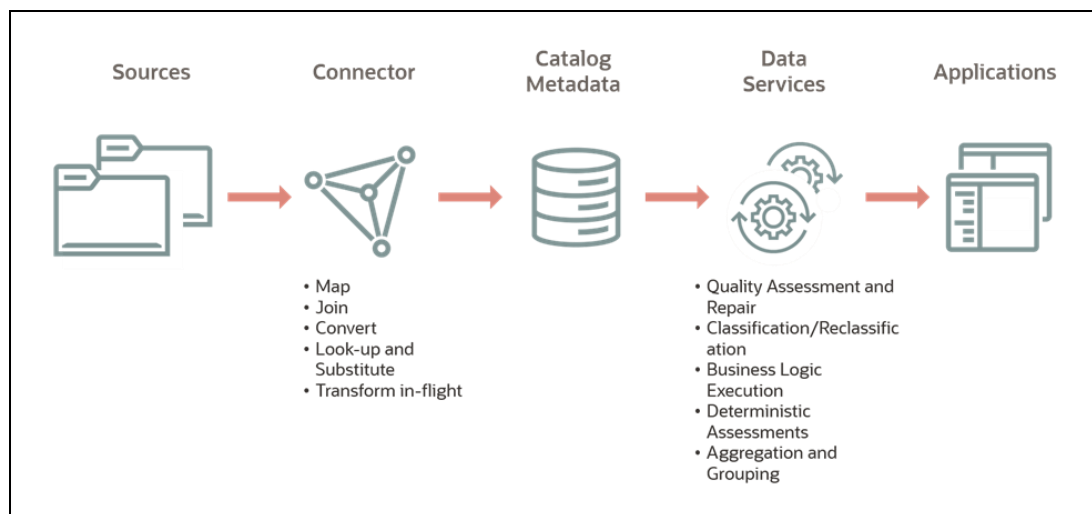
Data Catalog provides the Data Model for the Financial Services Industry. The key capabilities of the Data Catalog are as follows:

- **Catalog Browser:** Data Catalog consists of a Viewing Framework. The Data Catalog Browser API-based Interface allows you to view the Data Catalog Components. The Catalog Browser enables the Users to go through the Data Catalog Contents and view the Business Terms by Domain, Subject Areas, and Entity. The Catalog Browser also shows the Properties of Business Terms, Contextual Definition in a User-friendly language, List of Values, Data Sourcing Components, and Data Quality Rules.
- **In-built Data Modelling Capabilities:** Data Catalog contains all the required information to establish services underlying the Data Model, which is Entities, Attributes, and the relationship between Entities and Attributes. Similar to any Entity Relationship Modelling Tool used for this purpose, the Data Catalog can build, manage and hold Data Model for the deployment purpose.
- **Data Quality Checks Rule:** Data Catalog Contents include Data Quality Checks Rule so the system incoming data can be verified and validated.
- **Catalog Extension:** Data Catalog supports a Framework to extend the Data Catalog called as the Data Catalog Extension or catalog Extension. The Catalog Extension allows user to extend the Seeded Catalog Contents to support a new or client-specific business use cases. You can add new Business Terms or customize the existing definitions when the Business Term is enforced by the external entities.
- **Comprehensive Coverage:** Data Catalog provides a collection of comprehensive Business Terms across the Business Lines and Use Cases .
- **Data Movement:** Data Catalog provides the mechanism of 'Stage to Standardize to Process' to move the Data along to the Result for analytical consumption. The Catalog Services are accessed through API calls used by the Data Services Module to move data.

2 Data Catalog Architecture

Data Catalog is at the center of sources and uses of data. Along with providing comprehensive understanding of data through the available metadata about sources and uses, it is necessary to be able to enrich or modify as required. In this direction OFS Data Catalog is designed to support integration with Data Sources and downstream uses, which means predefined for known uses and extendable for the unknown. The Data Catalog by Subject Area can be further segregated as Sources, Results (calculated), and Master Data that are sourced and seeded, which helps to plan the sourcing and supplying of data based on the Enterprise needs. Considering the need to serve a conglomerate of Users, the Data Catalog is embedded with a sound Governance Framework assuring the security and privacy.

Figure: Data Catalog Architecture Diagram



3 Data Catalog Deployment

In the OFS Cloud Services, the Service-specific Functions (For example, Accounting Integration, Balance Computation, Reconciliation, and so on) and their relevant Business Terms are deployed.

The Deployment Process includes the Data Model upload, metadata deployments and creation of synonyms, and SLA (Sub-ledger Application) related ADI refresh tasks. The Data Catalog is the Data Model, which is grouped into Domain and Subject Areas. All the necessary Entities are mapped to the Subject Areas for the selected Domain.

Topic:

- [Levels to Deployment](#)

3.1 Levels to Deployment

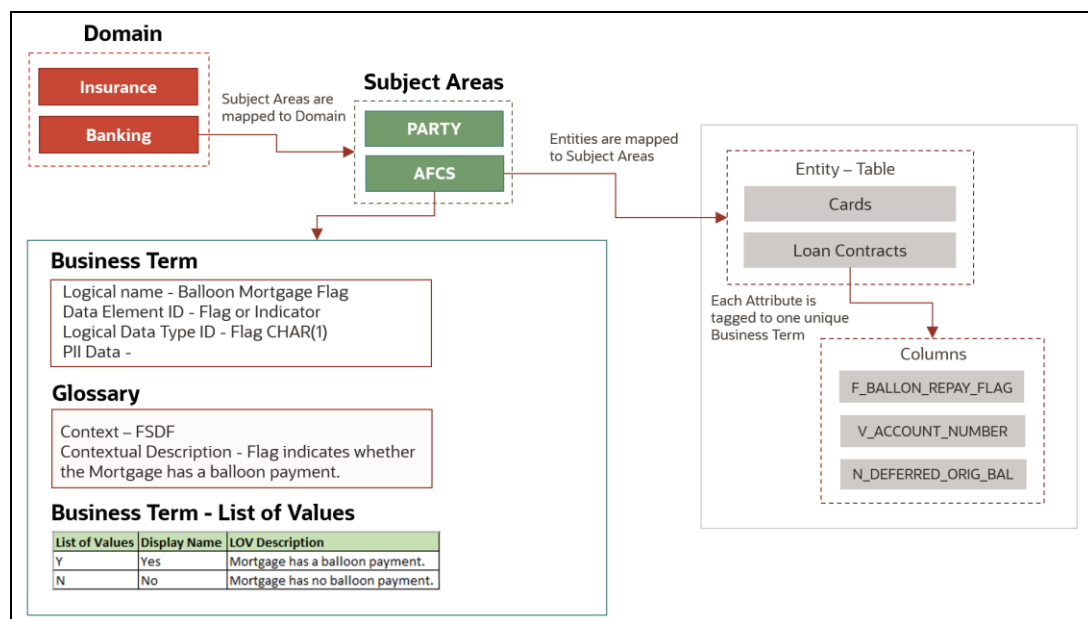
You can select the Domain during this Deployment Process. Based on the Entity to Subject Area mapping, the Entities are picked, and the Data Model upload takes place in the Domain. The deployment level is as follows:

- Domain Level Deployment

4 Data Catalog Components

A well defined structure is followed to seed and organize the Data Catalog Contents for efficient discovery and management. The structure starts with a Domain, which for example, in the OFSAA context can be either Banking or Insurance, and for this Domain, the Contents are created. Each Domain can have multiple Subject Areas, and a collection of Entities and Business Terms associated with those Subject Areas.

Figure: Data Catalog Components



The Data Catalog consists of the following Components:

- Domain
- Subject Area
- Entity
- Business Term
- Glossary
- Data Quality Check Rules

4.1 Domain

A Domain represents the category of the Business in the Finance Industry.

Data Catalog consists of the Data Catalog Framework and Seeded with Contents related to a specific Line of Business or Industry, which is referred to as a Domain.

In OFSAA, you can select the required Domain. For example, Banking, Insurance, and so on.

By selecting the Domain Name, you can restrict viewing the Catalog Components only to the intended Domains and deploy the Data Model also selectively.

4.2 Subject Area

A Subject Area represents a high-level data organization, which belongs to a group of related areas within a specific functional area of a Finance Organization.

Entities are grouped together into distinct Subject Areas based on the business functions or processing supported for a better identification and usage.

The relationship type between Domain and Subject Area is Many-to-Many.

The following are a few examples of Subject Areas in the Data Catalog:

- Accounting Foundation Cloud Service
- Party
- Product Processor
- Transaction
- Product

4.2.1 Relationship Between Subject Areas

Data Catalog has a provision to define the Parent-Child Relationship between the Subject Areas. Therefore, you can define the Parent-Child Relationship as follows if there is a business need:

- Domain to Subject Area Relationship

4.3 Entities

Each Business Term is related to an Entity of the Data Catalog. The Entities consist of Attributes. The Data Quality Rules are built for the Entities, so that the System Input Data can be verified and validated.

The Entities support data movements to ensure that when the Input Data is staged, standardized, and processed, there is a mechanism to move that data into the Cells for analytical consumption.

4.3.1 Properties

Entity consists of a set of Attributes. Each Attribute is mapped to a unique Business Term. Each Attribute derives its characteristics such as Data Type, Constraints, and so on from the Business Definitions.

4.3.2 Granularity

Data Catalog defines granularity of each of the Entity it holds.

Table: Granularity Level in the Data Catalog

V_GRAIN_ID	V_GRAIN_NAME
DATE	Date
ACCT	Customer Account
ACCT_TXN	Customer Account Transactions
ACCT_ENT	Accounting Entries
GL_DATA	General Ledger Data
EXCHANGE_RATE	Exchange Rates
PARTY_CONSENT	Party Consent

For example, as the Loan Contracts Entity contains information at the Account Level, the grains of Loan Entity is defined as ACCT.

4.4 Business Term

A Business Term is a Functional Keyword that represents a unique functional aspect of the Financial Artefacts (Entities and Attributes). There is a business meaning to each Financial Artefact, and therefore, a business name is created in the form of a Business Term. Then the Business Term is used to find and fit into a purpose of different contexts. Therefore, Business Terms are expressions of the Participants/Actors, their Activities, and requirements conveyed in common business.

The approach to arrive at the Logical View of the Physical Model has inverted in the Data Catalog. Contrary to the previous practices, first the Functional Keyword or Artefacts are identified, collated, and then expressed in common business language, and then the corresponding Physical Model is developed.

Multiple Business Terms are a part of each Subject Area. A Business Term is a singular term irrespective of multiple places it appears in and the Business Term will have a recognizable naming pattern.

Metadata is attached to the Business Terms.

The Content Structure allows you to define relationship between related Business Terms for better discovery and usage in the aspect of sourcing.

Table: Example of Relationship between Business Terms

Business Term	Related Business Term	Relationship Type
Current Write Off Amount	Write Off General Ledger Code	MEASURE_GL

To create or update a Business term, see the [Manage Business Terms](#) Section.

4.4.1 Business Term Properties

In the process of creating a Business Term, certain characteristics are also defined that serves as input when arriving to a Physical Model Structure. These characteristics include origin, classification, logical data type, PII term indicator, list of accepted values, and data quality check applicable for a Business Term.

To create or update a Business term, see the [Manage Business Terms](#) Section.

The Business Term Properties are as follows:

- Term ID
- Logical name
- Origin
- Data Element ID
- Language
- Logical Data Type ID
- PII Flag
- LOV Code
- Display Name
- LOV Description

NOTE:

The Business Terms for which PII Flag is set and for those Business Terms that are used in Entities, the underlying attributes of those Entities will be redacted by applying the appropriate redaction policies. A normal user cannot query or view the redacted data. Only users with exempt redaction policy role can view or query the data.

4.4.2 Business Term Glossary

For each Business Term, there is a corresponding Glossary. The Glossary explains the meaning and purpose of each Business Term, which is the context. The Glossary consists of the information such as description, usage, sample values, and usage examples of the Business Terms.

4.4.3 Business Term List of Values

Data Catalog defines and seeds the List of Values for all the Business Terms that are Flags. The List of Values help you with data sourcing and creating Data Quality Checks.

Table: Example of Business Term List of Values

List of Values	Display Name	List of Values Description
Y	Yes	Mortgae has a balloon payment.
N	No	Mortgae has no balloon payment.

4.5 Data Quality Checks

Data Catalog Contents include Data Quality Check Rules. These Rules are defined at the Business Term and Entity Level, and seeded as a part of the Data Catalog Content.

4.5.1 Types of Data Quality Checks

The following are the types of Data Quality Checks and their definitions:

Table: Data Quality Checks

Data Quality Check	Definition
Blank Value Check	Identifies if the base column is empty considering the blank space.
Column Reference/Specific Value Check	Compares the base column data with another column of the base table or with a specified direct value by using a list of pre-defined operators.
Data Length Check	Checks for the length of the base column data by using a minimum and maximum value, and identifies if it falls outside the specified range.
Duplicate Check	Is used when a combination of the column is unique and identifies all duplicate data of a base table in terms of the columns selected for the duplicate check.
List of Value Check	It can be used to verify values where a dimension/master table is not present. This check identifies if the base column data does not match with a value or specified code in a list of values.
NULL Value Check	Identifies if NULL is specified in the base column.

Data Quality Check	Definition
Referential Integrity Check	Identifies all the base column data that has not been referenced by the selected column of the referenced table. Here, the user specifies the reference table and columns.
Range Check	Identifies if the base column data falls outside a specified range of a Minimum and Maximum value. Value Needs to be between 0 and 100.

The controls are specific to reports.

4.5.2 Use and Execute the Source Data Quality Check Process

Use this Run Pipeline (Process) to perform the Data Quality Checks on source records for various data elements.

To use and execute the Source Data Quality Check Process in the Process Orchestration, do the following:

1. To access the Source Data Quality Check Process Pipeline, on the Home Page, select the **Process Orchestration**. The **Process Modeller** Page is displayed.
2. On the **Process Modeller** Page, search and select the Source Data Quality Check Process. The **Process Flow** Page is displayed. This Process Flow is designed on the Drawing Canvas using the Transition, Activity, and Widgets Components available in the floating toolbar. RUN DQ RULE Widgets representing DQ Groups are set up in parallel to each other. A Data Service Widget called as DQReportingEngine is added at the end meant for reporting Data Quality Checks.
3. To view the details of any Widget, double-click on the Widget and the details related to its Activity, Transition, and Notification are displayed. On the drawing canvas, you can select and see the Definition, Data Fields, and Application Rule details.
4. To execute the Run, you can select the Run Parameter Values using the **Execution** Button on the Process Flow Page or on the Process Modeller Page.

Go to the **Process Modeller** Page to execute the Run. Click the **Menu** Button corresponding to the Source Data Quality Check Process that needs to be executed. Click **Execute Run**. The **Execution** Page is displayed.

5. On the **Execution** Page, to execute the Run with parameters, select **With Parameters** in the **Execution Type List**. Select the required **As of Date** for which the Data Quality Checks need to be processed. Click the **Apply** Button to initiate the Run Pipeline execution.

NOTE:

The execution of the Run Pipeline is triggered using the selected Extraction Date.

See the [Process Orchestration](#) Section for more details about the Process Orchestration Framework.

6. To verify the Run Execution of the Source Data Quality Check Process, do the following:
 - a. To open the **Process Monitor** Page, on the **Process Modeller** Page, click the **Process Monitor** Button or select **Process Flow Monitor** on the Process Modeller Menu.
 - b. The **Process Monitor** Page is displayed, which lists all the Run Instances corresponding to the Source Data Quality Check Process. On the **Process Monitor** Page, search by the Process ID, or by the Process Name **Source Data Quality Check Process**, and select the Process Instance for the required Run Pipeline (Process) that was executed.
7. The **Process Flow** Page is displayed with the Run Execution Status on each Node of the Source Data Quality Check Process.
8. To verify the Run Execution Logs, do the following:
 - a. On the **Process Monitor** Page, click the required Process Instance for which you need to verify the Execution Logs. The **Process Flow** Page is displayed with the Run Execution Status on each Node.
 - b. To see the Execution Status details of a Node, double-click on that Node. The Execution Status details Page is displayed. Click **Execution Logs**. The Log Viewer Page is displayed, which lists all the Logs related to the Process Instance. To see the details of a log entry, click the **Show More** Button. Click outside the Log Viewer Page to close it.

4.6 Slowly Changing Dimensions

A Slowly Changing Dimension (SCD) is a dimension that stores and manages both current and historical data over time in a Data Warehouse.

4.6.1 Types of SCDs

The three types of SCDs are as follows:

- Type 1 SCDs - Overwriting: In a Type 1 SCD, the new data overwrites the existing data. Therefore, the existing data is lost as it is not stored anywhere else. No additional information needs to be specified to create a Type 1 SCD.
- Type 2 SCDs - Creating another dimension record: A Type 2 SCD retains the full history of values. When the value of a chosen attribute changes, the current record is closed. A new record is created with the changed data values and this new record becomes the current record. Each record contains the effective time and expiration time to identify the time period between which the record was active.

- Type 3 SCDs - Creating a current value field: A Type 3 SCD stores two versions of values for certain selected level attributes. Each record stores the previous value and the current value of the selected attribute. When the value of any of the selected attributes changes, the current value is stored as the old value and the new value becomes the current value.

Data Catalog supports Type 1 and Type 2 types of SCD.

The [Dimension Population Process](#) in the Process Orchestration displays the available SCDs with details such as Map Reference Number and Entity Name.

4.6.2 Hierarchy Data Loading

A Business Hierarchy refers to organizing data into logical tree structure to represent the groups and relations among various levels at which measure can be viewed. A measure can be viewed at different levels depending upon the hierarchy breakdown of the dimension category.

Data Catalog supports data loading using the following Hierarchies:

- Account Hierarchy Population
- Cash Flow Type Hierarchy Population
- Employee Hierarchy Population
- GL Account Hierarchy Population
- Legal Entity Hierarchy Population
- Line Of Business Hierarchy Population
- Organization Unit Hierarchy Population
- Party Hierarchy Population
- Product Hierarchy Population

NOTE:

You must provide the snapshot for the Hierarchy code that has been corrected or modified when you reload the Hierarchy data..

Hierarchy data loading is a part of the [Dimension Population Process](#).

4.6.3 Use and Execute the Dimension Population Process

Use this Run Pipeline (Process) to manage past and historical data for various Dimensions.

To use and execute the Dimension Population Process in the Process Orchestration, do the following:

1. To access the Dimension Population Process Pipeline, on the Home Page, select the **Process Orchestration**. The **Process Modeller** Page is displayed.

2. On the **Process Modeller** Page, search and select the Dimension Population Process. The **Process Flow** Page is displayed. This Process Flow is designed on the Drawing Canvas using the Transition, Activity, and Widgets Components available in the floating tool bar. SCD Widgets representing individual SCDs are set up in parallel to each other. At the end of this process, the Connectors representing Hierarchies are set in parallel.
3. To view the details of any Node, double-click on the Node and the details related to its Activity, Transition, and Notification are displayed. On the drawing canvas, you can select and see the Definition, Data Fields, and Application Rule details.
4. To execute the Run, you can select the Run Parameter Values using the **Execution** Button on the Process Flow Page or on the Process Modeller Page.

Go to the **Process Modeller** Page to execute the Run. Click the **Menu** Button corresponding to the Dimension Population Process that needs to be executed. Click **Execute Run**. The **Execution** Page is displayed.

5. On the **Execution** Page, to execute the Run with parameters, select **With Parameters** in the **Execution Type List**. Select the required **As of Date** for which the SCDs need to be processed. Click the **Apply** Button to initiate the Run Pipeline execution.

NOTE:

The execution of the Run Pipeline is triggered using the selected Extraction Date.

See the [Process Orchestration](#) Section for more details about the Process Orchestration.

6. To verify the Run Execution of the Dimension Population Process, do the following:
 - a. To open the **Process Monitor** Page, on the **Process Modeller** Page, click the **Process Monitor** Button or select **Process Flow Monitor** on the Process Modeller Menu.
 - b. The **Process Monitor** Page is displayed, which lists all the Run Instances corresponding to the Dimension Population Process. On the **Process Monitor** Page, search by the Process ID, or by the Process Name **Dimension Population Process**, and select the Process Instance for the required Run Pipeline (Process) that was executed.
7. The **Process Flow** Page is displayed with the Run Execution Status on each Node of the Dimension Population Process.
8. To verify the Run Execution Logs, do the following:
 - a. On the **Process Monitor** Page, click the required Process Instance for which you need to verify the Execution Logs. The **Process Flow** Page is displayed with the Run Execution Status on each Node.

- b.** To see the Execution Status details of a Node, double-click on that Node. The Execution Status details Page is displayed. Click **Execution Logs**. The Log Viewer Page is displayed, which lists all the Logs related to the Process Instance. To see the details of a log entry, click the **Show More** Button. Click outside the Log Viewer Page to close it.

5 Catalog Viewer

Catalog Viewer is the Viewing Framework of the Data Catalog.

Use the Catalog Viewer User Interface to see and understand the Catalog Components equivalent to the Data Model granularity.

5.1 View the Catalog

To use the Catalog Viewer User Interface, do the following:

1. To navigate to the Catalog Viewer, on the Home Page, select **Browse Data Catalog**. The **Catalog Viewer** Page is displayed. The deployed Domain, its corresponding Subject Areas, and all the relevant Entities are listed on the Catalog Viewer Page by default. Click the Previous or Next Arrow Buttons to navigate through the full list of Entities.
2. Use the Checkboxes to filter and display the required list of Entities and their details:
 - a. On the **Domains** List, select the Checkbox to filter the Entities List by the Domain Name.
 - b. On the **Subject Areas** List, select one or more Checkboxes associated with the Subject Areas to filter the Entities List by those Subject Areas.
3. Select the required Entity to view its **Relationships, Attributes, Sourcing, Process Info**, and **Governance** details in the Tabs.
 - On the **Relationships** Tab, the Entity relationship details are displayed.
 - On the **Attributes** Tab, you can search and see the list of Attributes of the Entity. Select the required Attribute to see its Details and List of Values. The Details List displays the Data Type and Description of the selected Attribute. In the List of Values Section, you can sort the **Value** and **Description** information by ascending or descending order. The Attribute, which is a PII (Personally Identifiable Information), is marked with a Red colored symbol.
 - On the **Sourcing** Tab, the Entity Source Details are listed, which are Connectors. In the Connector Section, you can do the following:
 - To see the details of any Connector, click that Connector. The **Connector** Page displays the details.
 - To add a Connector to the Entity, click **Add**. For information about creating a Connector, see the [Ingesting Data into AFCS](#) Section in the *OFS Accounting Foundation Cloud Service Core Functions Release 22A*.
 - To delete a Connector, click the **Delete** Button associated with it.
 - On the **Process Info** Tab, the Data Flow Information in the Entity from the Source to the Target is displayed.

- On the **Governance** Tab, the Data Quality Details of the Entity Attributes are listed.
- 4. To log an Issue for any Entity, click **Log Issue**. For information about logging an Issue, see the [Issues](#) Section in the *OFS Accounting Foundation Cloud Service Core Functions Release 22A*.
- 5. To go back to the Home Page, click the **Previous** Button.

6 Catalog Extension

The Catalog Extension allows you to extend the Seeded Catalog Contents to support a new or client-specific business use cases. You can create new definitions or customize the existing definitions based on context.

6.1 Manage Business Terms

To create a Business Term, log an Issue and then create an Action for that Issue. Then use the Action to create the Business Term.

To see the procedure about logging an Issue, see the [Issues](#) Section and for creating an Action, see the [Actions](#) Section in the *OFS Accounting Foundation Cloud Service Core Functions Release 22A*.

6.1.1 Create or Update a Business Term

To create or update a Business Term for an Action, do the following:

1. Go to the **Inbox**. To navigate to the Inbox, on the Home Page, click the **Inbox** Button. The **Inbox** Page is displayed.
2. To create a Business Term for an Action, do the following:
 - a. Select the required Action for which you need to create a Business Term. The Action Details Page is displayed.
 - b. On the **Extension** Tab, click **Create Business Term**. The **New Business Term** Page is displayed.
 - c. On the **Definition** Tab, set the following values.

Table: Business Terms Field Names and Description on the Definition Tab

Field Name	Description
Business Term Logical Name	Type a unique name for the Business Term Logical Name.
Classification	Select one of the following category for the Business Term: • Date and Timestamp • Flag or Indicator • List of Values • Monetary Amount • Numerical Non-Monetary • Text Description • Identifiers
Logical Data Type	Select the required Logical Data Type that defines the Data Type and Length of the Business Term.

Field Name	Description
Personally Identifiable Information	Select if the Business Term is a personal information or not. The value can be a Yes or No (Enable the Toggle Switch for Yes and disable for No).
Add	Click this Button to add this Business Term in the Glossary List.
Glossary Name	Type a unique name for the Glossary of Business Term.
Glossary Context	From the perspective of a Business Term, explain the meaning and purpose.
Business Term Description	Double-click on the blank space corresponding to this field and type a proper Description for the Business Term.
Delete	To delete a Glossary item, select the Glossary and click Delete .

d. On the **Relationships** Tab, set the following values.

Table: Business Terms Field Names and Description on the Relationships Tab

Field Name	Description
Add	Click this Button to add the Business Term in the Glossary List.
Group Code	Enter an identifier that represents that one Business Term is related to another Business Term.
Relationship Type	Enter the relationship type that occurs between Business Terms. For example, the relationship type between Maturity Date and Maturity Amount.
Related Business Term	Double-click on the blank space corresponding to this field and type a proper Description.
Delete	To delete a Relationship item, select the Relationship and click Delete .

e. Click **Save**. A Confirmation Acknowledgment is displayed: *Business Term created with ID: <ID Number>*. Click **OK** to close the Acknowledgment. On the **Extension** Tab, in the **Business Term Extensions** Section, the new Business Terms are listed.

3. To update an immediately created Business Term for an Action, do the following:

- a. Click the required Action for which you need to update a Business Term. The Action Details Page is displayed.
- b. On the **Extension** Tab, click the Business Term that you need to update.
- c. The Business Term Details Page is displayed. You can update any Field.
- d. Click **Save**. A Confirmation Acknowledgment is displayed: *Business with ID <ID> updated*. Click **OK** to close the Acknowledgment. On the **Extension** Tab, in the **Business Term Extensions** Section, the new Business Terms are listed. Click outside the Action Details Page to close it.

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