Reference Data Managament in your organization: what is the purpose of managing reference data and what are the benefits of doing so?
Proof of Concept using Metastudio DRM

We offer a personalized and customized Proof of Concept (PoC) for reference data management that can serve as a quick start for your RDM journey. The PoC will be developed using Metastudio DRM and Microsoft SQL Server, which will run in your Azure environment.

Introduction

Are you curious about how Reference Data Management actually works and what value it can bring to your organization? Are you hesitant to invest in a solution you don't fully understand yet? This offer provides a solution for one of your reference data challenges and gives you the opportunity to evaluate RDM before moving forward.

For this proof of concept, we will use Metastudio DRM, connected to an Azure SQL Database in your Azure environment.

Project
PoC tasks include:

- Preparing a dedicated PoC scenario for you, based on the sample RDM problems you provide
- Setting up a sandbox environment
- Registering several sample dictionaries along with all the necessary functionalities
- Conducting several exercises that illustrate various use cases related to maintaining reference vocabularies, such as:
  - Editing reference data using key functions that support business users: value domains, enumerations, and management of validity periods
  - Different scenarios for importing reference data into dictionaries: full, partial, and with automatic handling of validity periods
  - Defining various constraints in the dictionary to prevent business users from entering inappropriate data, such as: value range validators, regular expression-based validators, and lists of allowable values
  - Examples of propagating work products between DEV, TST, and PROD environments

Deliverables
- A prepared environment ready for carrying out the PoC and made available for a specified time for conducting your own tests
- Knowledge transfer about the prepared environment, dedicated use cases, and capabilities of the Metastudio DRM tool

Summary
The main goal of this offer is to provide your company with a functional solution that addresses a specific need, which you can continue to build upon once you are convinced of the value that reference data management brings to your organization.

- We offer a Proof of Concept (PoC) for reference data management tailored to your specific needs and challenges.
- The PoC will include various exercises illustrating different use cases related to maintaining reference dictionaries, such as editing data, importing data, and defining constraints.
- We will provide a prepared environment for carrying out the PoC and make it available for a specified time for conducting your own tests.
- We will also provide knowledge transfer about the environment, use cases, and capabilities of the Metastudio DRM tool.
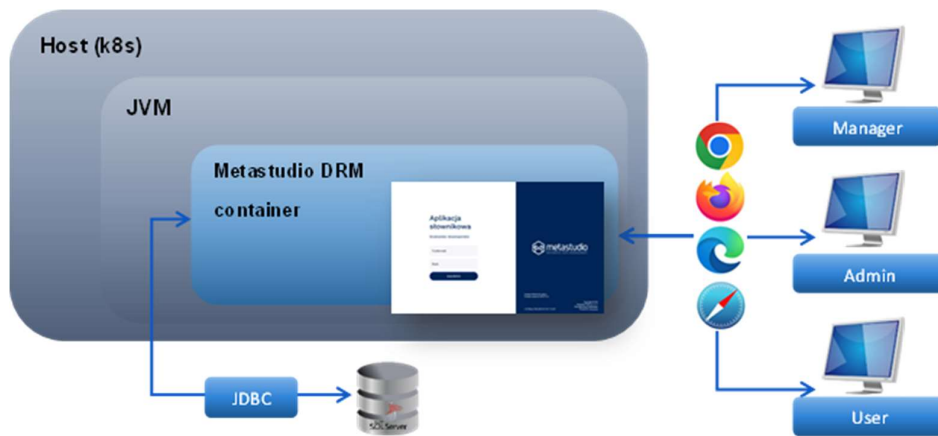
Figure 1 Metastudio architecture in Azure
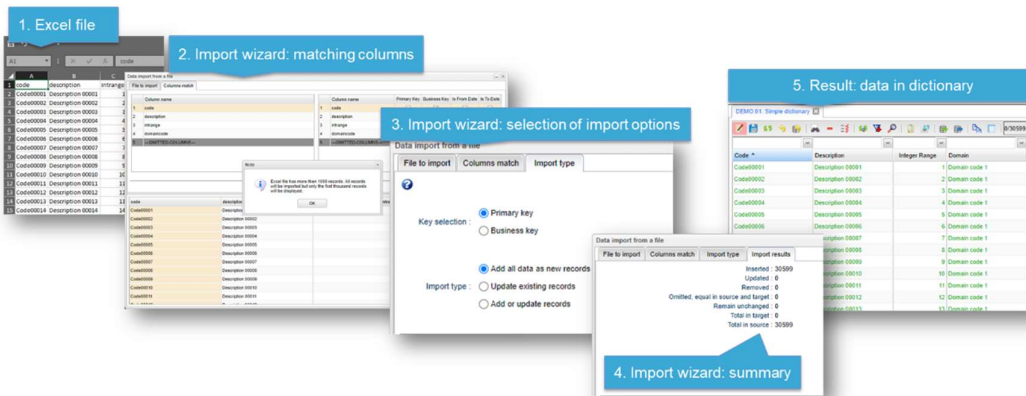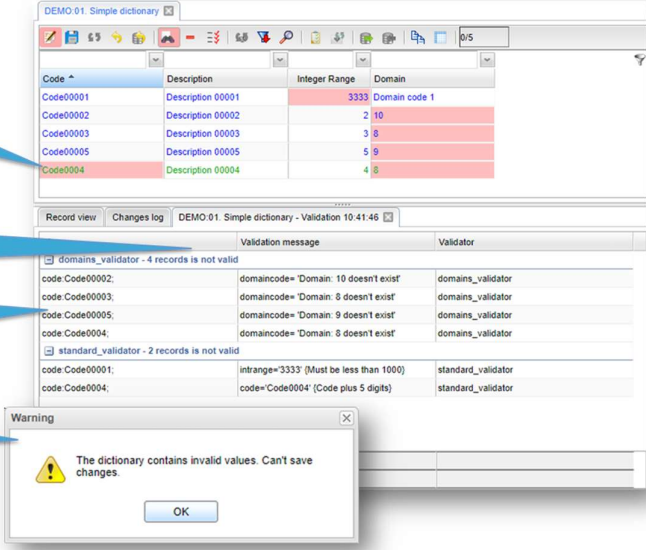
Figure 2 Importing data from Excel spreadsheet

Imported data can be automatically validated. Invalid tuples are marked in red.

A detailed report shows all the errors found:
✓ Record ID
✓ Validation message
✓ Validator name

It is possible to quickly go to the incorrect record by clicking on it in the validation report and then correcting the identified error.

It is possible to enable protection against saving incorrect data.
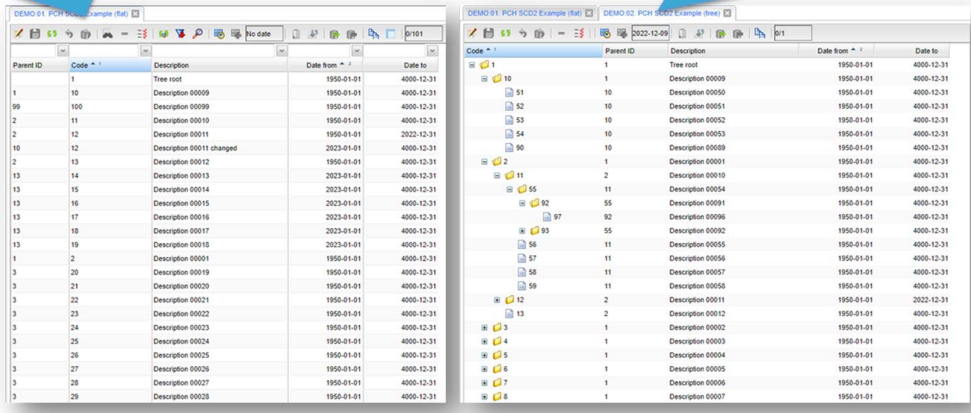
Figure 3 Data editing and validation results

Flat dictionary with parent (Parent ID) and child (Code) columns…

…can be presented in a tree form.

Figure 4 Different forms of dictionary data presentation

Open new validity period for a record

By calling the function of *opening a new validity period for a record*, the validity period of its old version is automatically closed (blue color)…

…and additionally, a new record (green color) is inserted with the selected start of the validity period and modified values.

Figure 5 Periods of validity

Slowly changing dimensions versioned according to type 4, i.e. where the history is stored in a separate table, can be presented in the form of a layout

The main dictionary is presented in the upper part of layout. All editing features are available.

The history of changes is presented in the lower part of layout. The history is linked in the layout definition. When a record is selected in the main dictionary, the history of that particular selected record is presented.

Figure 6 History of changes