

METADATA STRATEGY EXAMPLE

mds-dsn-xmpl-01 Design March 2015

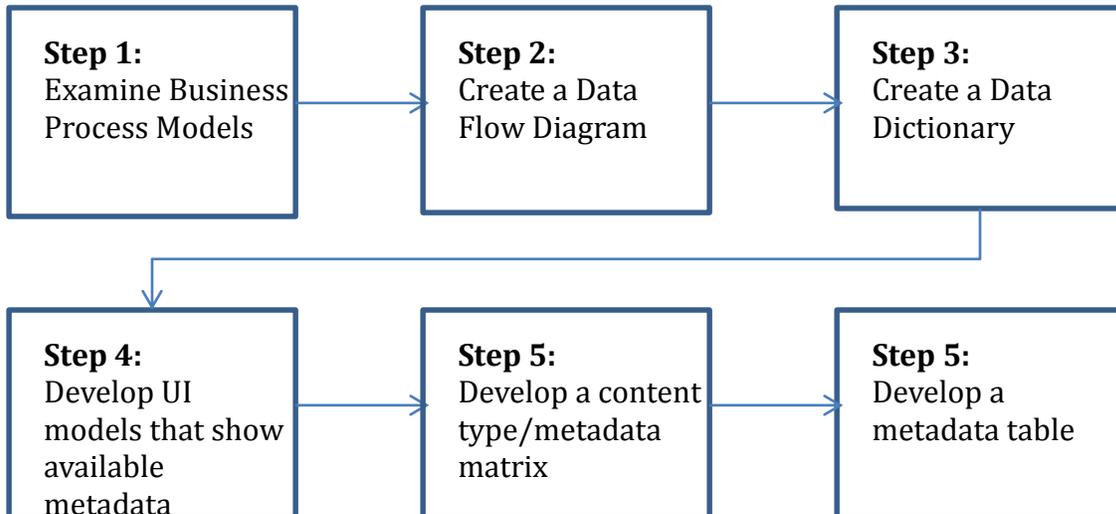


CONTENT
STRATEGY
ALLIANCE

METADATA REQUIREMENTS & EXAMPLES

Introduction

Metadata requirements for a solution can be defined using the following six-step process that leverages a combination of models, diagrams, matrices and tables:



Step One: Examine Business Process Models

Definition

A business process model is a visual representation of the sequential flow of activities that occur within a defined set of individual roles or groups for a specific business domain. Business Analysts typically create business process models.

Application

A process model is used to obtain common understanding for how a specific process operates and is typically done for purposes of process improvement (that may or may not include the implementation of automation).

Benefits

Process model reviews can be used to determine:

- What metadata changes occur within the different steps of the process (e.g., workflow status, life cycle state)
- What metadata is required to trigger workflow and notifications
- What metadata that was initially editable will become read only, when will this occur and who will it apply to (e.g., to specific users or to all)
- When metadata is automatically pulled to auto-populate fields within content files
- When metadata is automatically extracted from content files and pushed to a database
- What specific values need to be searched/filtered (and when & how)
- What types of reports will be needed and when they will be executed (e.g., just an export, or perhaps also include reports that leverage metadata to provide aggregated metrics)
- When compliance rules will need to be enforced (e.g., if an audit trail is required, when will it need to be updated, and what metadata values will need to be included)
- What specific types of metadata will need to be available if at some point the content needs to be placed in an archived state

Example

http://en.wikipedia.org/wiki/Business_process_modeling

Step Two: Create a Data Flow Diagram

Definition

A data flow diagram provides a visual representation of how data is input, processed, stored and outputted from within a system or a combination set of internal and/or external systems.

Application

A data flow diagram is typically used to identify and document all of the specific data elements that flow within a system and between different systems.

Benefit

Dataflow diagrams can be used to determine:

- Sources of metadata (where it originates from).
- Flow of metadata (where does it travel to).
- Processes that transform metadata (e.g., what will update its value).
- Where the metadata lands (where is it stored after processing, or if additional fields need to be added to target systems for purposes of integration).

Example

http://en.wikipedia.org/wiki/Data_flow_diagram

Step Three: Create a Data Dictionary

Definition

A data dictionary lists all business terms that are relevant to the business domain (e.g., the particular area of the business or the specific boundaries of the organization which we are focusing on), along with the agreed-upon definitions.

Application

A data dictionary can be used as a metadata repository to capture agreement on all terms within the business domain so that a common understanding can be achieved.

Benefit

- Provides understanding on the scope of metadata that is relevant to the domain.
- Generates harmonization on the terminology between different domains.
- Encourages consistent use of business terminology and meaning of terms.

Example

Term	Definition	Acceptable Values
Life cycle Status	The series of state changes which occur as a document progresses through a workflow.	Draft In Review Reviewed In Approval Approved

Step Four: Develop User Interface Models That Show Available Metadata

Definition

A user interface model is a visual model that depicts the display that an end user will see when interacting with a system.

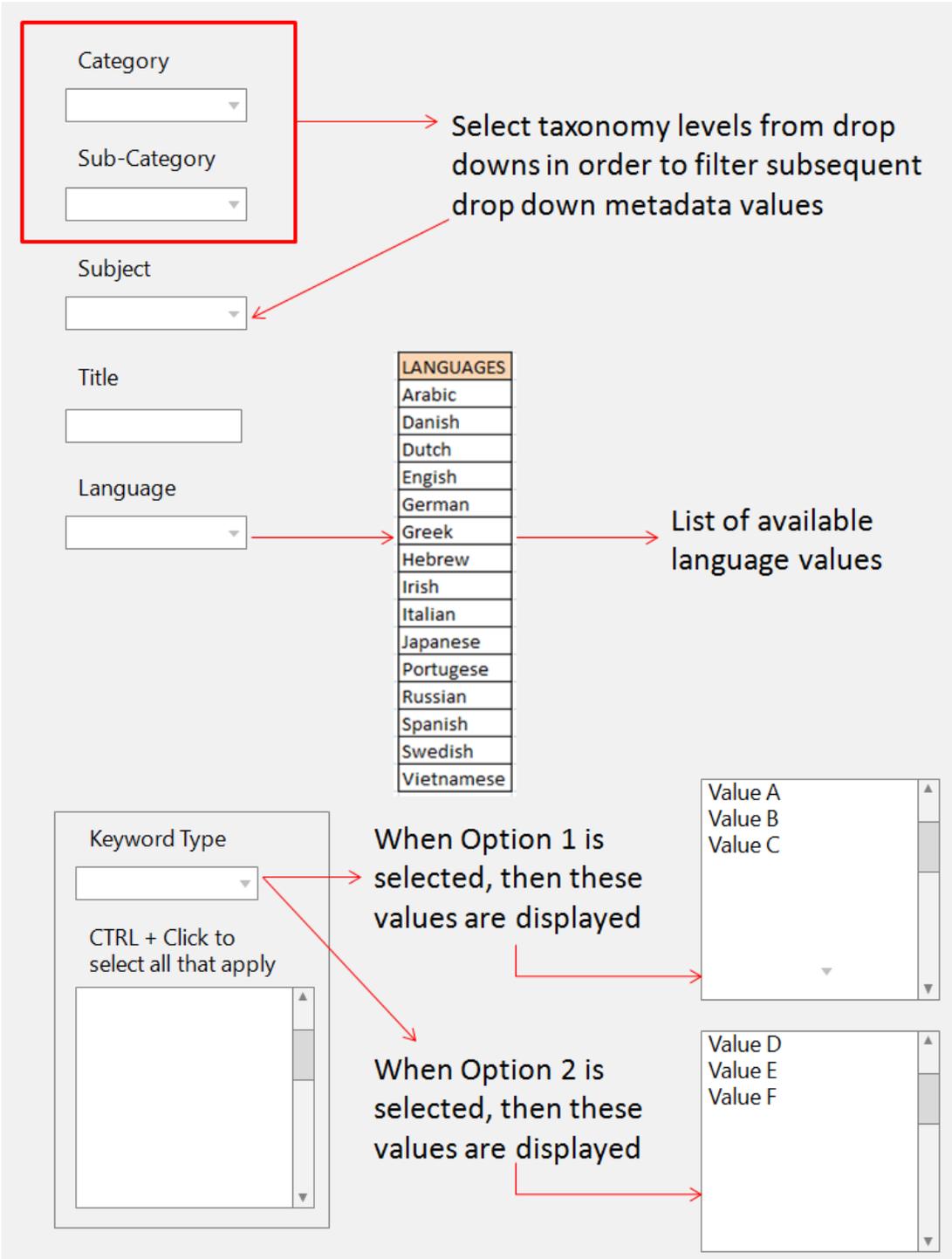
Application

User interface models are typically used as a technique to elicit, document and confirm the requirements for what a user will see and how they will interact with a user interface.

Benefit

- Users are able to actually “see” the metadata the solution will provide in advance.
- Promotes easy collaboration with stakeholders.
- Makes it feasible to incorporate comments and suggestions directly into the visual.
- User review time is more effective and efficient versus just reviewing a text-based requirement within a document.

Example



Step Five: Develop a Content Type/Metadata Matrix

Definition

A content type/metadata matrix is used to display the association between the entire set of metadata vs. all of the different content types within a system.

Application

A content type/metadata matrix is typically used for a solution that has many different content types that share the same metadata in many instances.

Benefit

Documents the relationship between the different content types and metadata within the system. Provides a high-level view perspective of metadata fields that are used across different content types.

Example

Display Name	Content Type #1	Content Type #2	Content Type #n
Subject	Yes	No	Yes
Title	No	Yes	No
Keywords	No	Yes	Yes

Step Six: Develop Metadata Table

Definition

A metadata table provides a textual listing and corresponding description for each of the metadata fields that will be used within a system.

Application

A metadata table is typically used to capture the specific functional requirements for the metadata.

Benefit

- Provides a cohesive and complete set of specifications for the metadata that will need to be used within a system.
- Can be used by the technical implementation team in order to begin development on the database design.

Example

Display Name	Data Type	Single or Repeating	Free form or List	Required or Optional	Default Value(s)
Label for the metadata element seen on the screen	Examples: Text, Numeric, Boolean, and Date	Can metadata store single values, or an array of multiple values?	Can metadata value be directly entered by the user, or must be selected from a predefined list of values?	Can metadata be valued upon creating or updating the content asset, or can it be left blank?	Available list values generated from a static list of values, or dynamically generated based on previous selections
Category	Text	Single	List Value	Required	Based on Taxonomy Category
Sub-Category	Text	Single	List Value	Required	Based on Taxonomy Sub-Category
Subject	Text	Single	List Value	Required	Dynamic List of Values based on Category & Sub-Category selections
Title	Text	Single	Free Form	Required	None
Language	Text	Single	List Value	Required	Static List of Values
Keyword Type	Text	Single	List Value	Optional	Dynamic List of Values based on Subject selected
Keywords	Text	Repeating	List Value	Optional	Dynamic List of Values based on Keyword Type selected