

Foreword Acknowledgments Introduction		xv xvii xix
Part One	Laying the Foundation	1
Chapter 1	Introducing Meta Data and Its Return on Investment	3
	In the Beginning Information Technology Begins to Walk	3 4
	Defining Meta Data	4
	Meta Data—The Beginnings Commercial Evolution of Meta Data Factors Shaping Today's Meta Data Market	6 6 10
	Why Meta Data Is Needed Inflexible and Nonintegrated Systems Growth of Existing Data Warehouses and Data Marts Unfulfilled Needs of Business Users High IT Employee Turnover Lack of User Confidence in Data	11 12 13 16 18
	Emergence of Customer Relationship Management	18
	Decision Support Moves to the Forefront Components of a Decision Support System Decision Support Challenges	21 22 26

7

	Meta Data ROI	28
	Data Definition Reporting	30
	Data Quality Tracking	31
	Business User Access to Meta Data	34
	Decision Support Impact Analysis	37
	Enterprise-Wide Impact Analysis	42
Chapter 2	Meta Data Fundamentals	47
	Meta Data and the Meta Data Repository	47
	Technical and Business Meta Data	49
	Meta Data and External Data	50
	Meta Data Users	52
	Business Users	52
	Technical Users	53
	Power Users	54
	Common Meta Data Sources	54
	ETL Tools	54
	Data Modeling Tools	56
	Reporting Tools	56
	Data Quality Tools	57
	Vendor Applications	58
	Miscellaneous Sources	58
	Structured and Unstructured Meta Data	59
	Structured Meta Data Sources	59
	Unstructured Meta Data Sources	59
	Data Stewardship	61
	Identifying Your Data Steward	62
	Meta Data Security	62
Chapter 3	Meta Data Standards	65
	Why Are Meta Model Standards Important?	65
	Tool Meta Data Sharing	66
	Tool Interoperability	68
	Meta Model Standards	68
	What Constitutes a Good Standard?	69
	Meta Data Coalition	70
	Object Management Group	74
	The Bottom Line	75
	The XML Standard	76
	How XML Works	77
	Why Use XML for Meta Data Exchange?	79
	The Bottom Line	81

Part Two	Implementing a Meta Data Repository	83
Chapter 4	Understanding and Evaluating Meta Data Tools	85
	The Meta Data Tool Market	-85
	Requirements for Repository Tools Determining Types of Meta Data	86 87
	Administrative Facilities	87
	Sharing and Reusing Meta Data Extensibility and Compliance with Emerging Standards	89 90
	Using the Repository	90
	Meta Data Integration	92
	Meta Data Integration Tools	92
	Integrating Meta Data Sources	93
	Meta Data Integration Architecture	94
	Tool Vendor Interview Process	96
Chapter 5	Organizing and Staffing the Meta Data Repository Project	115
	Why Meta Data Projects Fail	115
	Failing to Define Objectives	116
	Evaluating Meta Data Tools Prior to Defining Project	
	Requirements	117
•	Selecting Meta Data Tools without a Thorough Evaluation	117
	Failing to Create a Meta Data Repository Team Failing to Automate the Meta Data Integration Processes	118 118
	Allowing the Meta Data Tool Vendors to Manage the Project	119
	Failing to Appoint an Experienced Meta Data Project Manager	119
	Trivializing the Meta Data Repository Development Effort	120
	Failing to Create Standards That Supporting Teams Can Follow	120
	Failing to Provide Open Access to the Meta Data	121
	Meta Data Repository Team Responsibilities	121
	Organizing the Meta Data Repository Team	122
	Project Champion	123
	Project Manager	125
	Repository Architect	128
	Data Modeler	129
	Business Analyst	131
	Data Acquisition Developer (Back-End)	132
	Data Delivery Developer (Front-End) Middleware Developer	133 135
	Infrastructure Developer	136
	Tool Architect	137
	What Makes a Good Team?	140

Chapter 6	Building the Meta Data Project Plan	143
	Identifying the Initial Activities Educating the Clients Adjusting the Plan to Staff Capabilities Funding and Scheduling the Project Selecting a Project Methodology	143 144 144 146 146
	Creating the Project Plan	147
	Reading the Project Plan Task ID Duration Dependency Resource Name	148 149 150 150
	Orientation Phase	151
	Feasibility Phase Create Project Scope Document Perform High-Level Planning and Estimating	154 154 163
	Design Phase Evaluate and Select Meta Data Tools Create Meta Data Integration Architecture Document Create Detail Design Documents Prepare Training Plan for Development Staff	167 171 171 173 174
	Construction Phase	176
	Rollout Phase	178
Chapter 7	Constructing a Meta Data Architecture	181
	What Makes a Good Architecture Integrated Scalable Robust Customizable Open	181 182 182 184 184 184
	Key Elements of Meta Data Architecture Clear Management Direction The Same Front End Entity and Attribute Naming Standards Multiple Sources of Meta Data Automated and Reusable Processes Standardized Integration Process Flexible Meta Model Multiple Versions of Meta Data Update Facilities	185 185 186 186 187 188 189 192 193
	Component-Based Multitier Architecture	195

		Contents	xiii
	Security Management Scheme	196	
	Cross-Tool Meta Data Dependency and Lineage	196	
	A Real-World Architecture Example	197	
	Structuring the Meta Data Architecture	199	
	Centralized Meta Data Repository Architecture	199	
	Decentralized Meta Data Repository Architecture	200	
	Looking Ahead: Advanced Architectural Techniques	201	
	Bidirectional Meta Data	202	
	Closed-Loop Meta Data	203	
Chapter 8	Implementing Data Quality through Meta Data	205	
	Expanding the Use of Technical Meta Data	206	
	Tagging Technical Meta Data	207	
	Extended Technical Meta Data	208	
	Load Date	209	
	Update Date	210	
	Load Cycle Identifier	210	
	Current Flag Indicator	211	
	Operational System Identifier	$\frac{211}{212}$	
	Active Operational System Flag Confidence Level Indicator	212	
	Technical Meta Data Column Assignment	214	
	Strategies for Using Technical Meta Data Tags	215	
	Extracting Current Dimension Table Data	216	
	Rolling Back the Load Cycle	217	
	Archiving and Purging	218	
	Slowly Changing Dimensions (Type 2)	218	
	Slowly Changing Fact Table ETL Processing	219	
	Maintaining Current and History Dimension Tables	227	
	Using Technical Meta Data to Resolve Quality Issues	230	
	Too Much of a Good Thing?	231	
	Summary	232	
Chapter 9	Building the Meta Model	235	
	What Is a Meta Model?	236	
	Goals for Your Meta Model	236	
	Object Model Example	238	
	Traditional Model Example	241	
	Summary of Meta Data Models	242	
	Building the Meta Model	244	

7

	Using the Model Generic Object Model Traditional Model	248 248 258
	Meta Models and Decision Support Systems Real-World Example of a Meta Model	$\begin{array}{c} 261 \\ 262 \end{array}$
	Summary	275
Chapter 10	Meta Data Delivery	277
	Evaluating Delivery Requirements Who Are the Users? What Is the Repository's Level of Integration? What Information Do Users Need? Does the Repository Tool Have a Data Delivery Component? How Many Repository Tool Users Are There? Where Are Users Geographically Located?	277 278 279 281 283 291 291
	Selecting the Delivery Architecture Architectural Types to Consider Web-Enabled or Thin Client Enterprise Information Portal	292 297 299 303
	Summary	307
Chapter 11	The Future of Meta Data	309
	Looking Ahead Evolution of Meta Data Architecture Meta Data Moves Enterprise-Wide XML and Meta Model Standards Meet Meta Data Controlled Systems The Meta Data Driven Enterprise	309 310 314 318 319 320
Appendix A		323
• •	Tool Evaluation Checklist	
Appendix B	Meta Data Project Plan	339
Appendix C		349
• •	DDL Sample Model Code	
Glossary What's on t	he CD-ROM?	361 379 381