

Project Note

Metadata Repository successfully implemented

A financial services institution wanted to implement a Metadata Repository to support documentation and development of its complex distributed systems. Zühlke supported the implementation, delivering significant benefits and cost savings.

Task

A financial services institution manages a large distributed system for investment and fund accounting services that it provides to institutional clients. The system has many interfaces both internally and to external clients. Zühlke developed tools to import and leverage metadata from the systems, and designed effective metadata governance processes.

Implementation

The selected Metadata Repository (MDR) supports a lot of requirements out of the box, including importing metadata assets in different formats, and querying and browsing metadata. Several technologies were not supported by the MDR and required extensions. In particular, the client required generation of documentation for specification and sales purposes in different output formats. Moreover, Zühlke defined a metadata governance process and assisted the client in establishing new roles, such as Metadata Steward, through training and mentoring of client staff. Zühlke used Agile processes based on Scrum and Test-Driven Development to develop extensions to the MDR tool including:

- new import mechanisms to “on-board” metadata assets
- generation of custom PDF documentation
- XML schemas to represent the content of specifications, sales documentation and glossaries for use with PDF forms.
- features to “refresh” the PDF XML content with updated metadata, and a differencing engine to compare and show differences between forms
- a component that can generate XML schema design diagrams for inclusion in specifications
- a web component that was integrated with the metadata browser in order to extract document content from the repository and to handle the PDF files.



Customer benefits

- Thanks to the agile development of the extensions with bi-weekly releases, the client management could derive value early for both sales and development users
- Metadata driven specification and XML code generation reduced some code development costs by 80 percent.

Technical Data

- Ab Initio EME Metadata Repository
- BPMN to define Governance Processes
- Agile Development with Scrum
- TDD with FIT and JUnit
- Technologies:
 - XML Schema
 - XSLT
 - XMLDiff
 - Apache Tomcat
 - Adobe Lifecycle Designer
 - iText

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