

# [MS-DPMDS]: Master Data Services Data Portability Overview

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# Contents

- 1 Introduction ..... 4**
  - 1.1 Glossary ..... 4
  - 1.2 References..... 4
  
- 2 Data Portability Scenarios ..... 5**
  - 2.1 Create and Deploy a Deployment Package ..... 5
    - 2.1.1 Data Description ..... 5
    - 2.1.2 Format and Protocol Summary ..... 5
    - 2.1.3 Data Portability Methodology ..... 6
      - 2.1.3.1 Preconditions ..... 6
      - 2.1.3.2 Versioning ..... 6
      - 2.1.3.3 Error Handling ..... 6
      - 2.1.3.4 Coherency Requirements ..... 7
      - 2.1.3.5 Additional Considerations..... 7
  - 2.2 Deploy a Prepackaged ISV Deployment Package ..... 7
    - 2.2.1 Data Description ..... 7
    - 2.2.2 Format and Protocol Summary ..... 7
    - 2.2.3 Data Portability Methodology ..... 8
      - 2.2.3.1 Preconditions ..... 8
      - 2.2.3.2 Versioning ..... 8
      - 2.2.3.3 Error Handling ..... 8
      - 2.2.3.4 Coherency Requirements ..... 9
      - 2.2.3.5 Additional Considerations..... 9
  
- 3 Appendix A: Model Deployment XSD ..... 10**
  - 3.1 Elements ..... 10
  - 3.2 Arrays ..... 11
  - 3.3 Package Structure..... 12
  
- 4 Change Tracking..... 14**
  
- 5 Index ..... 15**

# 1 Introduction

The Master Data Services Data Portability Overview document provides an overview of data portability for Master Data Services (MDS), a Master Data Management (MDM) application that is built from platform components. MDS can be deployed as an application or can be extended by using these platform components to consistently define and manage the critical data **entities** of an organization.

MDS helps organizations standardize and streamline the business data that customers use to make critical business decisions. It is an any-domain hub that supports, but is not limited to, domains such as product, customer, location, cost center, equipment, employee, and vendor.

By using MDS, organizations can manage critical data assets by enabling proactive stewardship, enforcing data quality rules, defining workflows around data changes, notifying impacted parties, managing hierarchies, and sharing the authoritative source with all impacted systems.

## 1.1 Glossary

The following terms are defined in [\[MS-SSMDSWS\]](#):

**business rule**  
**entity**  
**model**

The following terms are specific to this document:

**model deployment package:** The XML file that contains the MDS **model** metadata (schema) and that can optionally contain the user's **model** data (master data). The package is created by the **Model Deployment Wizard** on a source system and is deployed by the wizard on the target system. The file format of the package is defined in Appendix A: Model Deployment XSD, section [3](#). The XML in the file conforms to the XSD defined in [\[MSDN-MDPXS\]](#).

**Model Deployment Wizard:** The wizard UI in MDS that is used by the user to create a **model deployment package** or to deploy a previously created **model deployment package**.

## 1.2 References

[MS-SSMDSWS] Microsoft Corporation, "[Master Data Services Web Service](#)".

[MSDN-MDM] Microsoft Corporation, "Model Deployment Wizard (Master Data Manager, System Administration)", [http://msdn.microsoft.com/en-us/library/ee633778\(v=SQL.105\).aspx](http://msdn.microsoft.com/en-us/library/ee633778(v=SQL.105).aspx)

[MSDN-MDPXS] Microsoft Corporation, "Model Deployment Package XML Schema (Master Data Services)", <http://msdn.microsoft.com/en-us/library/ff714018.aspx>

[XML] World Wide Web Consortium, "Extensible Markup Language (XML) 1.0 (Fifth Edition)", W3C Recommendation, November 2008, <http://www.w3.org/TR/2008/REC-xml-20081126/>

## 2 Data Portability Scenarios

### 2.1 Create and Deploy a Deployment Package

An architect who is building a new **model** builds the model in the organization's MDS development system. He then uses the MDS model deployment feature to package the model—including its entities, hierarchies, collections, attribute groups, and **business rules**—into a deployment package, and then saves it to a network share.

The architect then starts the administrator UI for the organization's MDS quality assurance (QA) environment. In the QA MDS system, he launches the model deployment feature, navigates to the customer deployment package that he created on the development system, and then deploys it in the QA system. The model and all of its contents are deployed in the QA system and are ready for testing by the organization's customer data stewards.

After testing and sign off by the data stewards, the architect now must deploy the customer model to the production MDS system. He logs on to the development system, starts the model deployment feature, creates a new deployment package for the customer model, and then saves it to a network share. He then logs on to the production system, starts the model deployment feature, and then navigates to the customer deployment package that he created on the development system. With a few clicks, he deploys the new customer model on the production system.

#### 2.1.1 Data Description

The model deployment process can include data within the **model deployment package**. For the purposes of this document, this data is the user data. This user data is commonly known as master data.

Master data consists of the critical nouns of a business and falls into four groupings: people, things, places, and concepts. Further categorizations within those groupings are called subject areas, domain areas, or entity types.

For example, within the people grouping, the domain areas may include customer, employee, and salesperson. Within the things grouping, the domain areas may include product, part, store, and asset. Within the concepts grouping, the domain areas may include contract, warrantee, and licenses. Finally, within the places grouping, the domain areas may include office locations and geographic divisions.

Some of these domain areas may be further divided. For example, the customer domain area may be further divided based on incentives and history, or a company may have regular customers as well as premiere and executive customers. The product domain area may be further divided by sector and industry. For example, the requirements, life cycle, and create, read, update, and delete cycle for a product in the consumer packaged goods (CPG) sector are likely to be very different from those of products in the clothing industry.

The granularity of domains is determined by the magnitude of differences between the attributes of the entities within the domains.

#### 2.1.2 Format and Protocol Summary

The following table provides a comprehensive list of the formats and protocols that are used in the data portability scenarios.

Protocol or format name	Description	Reference
MDS	Master Data Services	<a href="#">[MS-SSMDWS]</a>
XML	Extensible Markup Language	<a href="#">[XML]</a>
Model Deployment XSD	Model Deployment Format XSD	<a href="#">[MSDN-MDPXS]</a>

### 2.1.3 Data Portability Methodology

#### Export

The process for full model data extraction from MDS is done through the **Model Deployment Wizard** UI [\[MSDN-MDM\]](#). The wizard simplifies the task of selecting the model and data, including the data version, for extraction into the package file. The following steps are performed to create the model deployment package:

1. After launching the wizard from the **System Administration** page in MDS, the user clicks **Create**. From a drop-down list that contains all models in the MDS system, the user selects and the model to use to create the package file. The drop-down list is truncated based on the user's permissions settings.
2. The user selects whether to include model data in the package and the data version from which to extract that data. When the user clicks **Next** in the wizard, the wizard internally calls the appropriate APIs to extract the model metadata and data and to serialize it into XML by using native serialization in Windows Communication Foundation (WCF).
3. After the package is created, in the wizard, the user specifies the location in which to save the package file. Saving the package file completes the package creation process.

The XML in the file conforms to the XSD that is defined in [\[MSDN-MDPXS\]](#).

Using the model deployment API is similar to using the UI. The user calls the Create API, and then specifies the model, indicates whether to include data and the data version (if data is selected), and then specifies the location for the package file. The API handles the extraction process in the same way that the UI does. The details of the extraction are opaque to the user. The user specifies the model, whether to include data, and the data version.

#### 2.1.3.1 Preconditions

To create the package by using the wizard, the user must have administrator permissions on the source system. To deploy the package, the user must have administrator permissions on the target system.

#### 2.1.3.2 Versioning

This data portability scenario has no special versioning requirements. The data is versioned within MDS; if the user decides to include data in the package, the user selects the data version to include.

#### 2.1.3.3 Error Handling

If business rules exist that rely on data values and if data is not included in the package, the deployment fails.

### 2.1.3.4 Coherency Requirements

There are no special coherency requirements.

### 2.1.3.5 Additional Considerations

There are no additional considerations.

## 2.2 Deploy a Prepackaged ISV Deployment Package

A consulting company has created an MDS product master model that is specifically geared to the pharmaceutical industry. A pharmaceutical corporation has engaged the consulting company to implement the product model on its MDS landscape. A consultant brings the product model to the pharmaceutical corporation on her USB flash drive.

Working with a data architect and a database administrator, the consultant copies the model to a network share on the pharmaceutical corporation's network. The database administrator logs on to the MDS development system and starts the Model Deployment feature. With a few clicks, he deploys the product model on the MDS development system. The architect can then begin to evaluate the utility of the prepackaged product model provided by the consultant.

### 2.2.1 Data Description

The model deployment process can include data within the model deployment package. For the purposes of this document, this data is the user data. This user data is commonly known as master data.

Master data consists of the critical nouns of a business and falls generally into four groupings: people, things, places, and concepts. Further categorizations within those groupings are called subject areas, domain areas, or entity types.

For example, within the people grouping, the domain areas may include customer, employee, and salesperson. Within the things grouping, the domain areas may include product, part, store, and asset. Within the concepts grouping, the domain areas may include contract, warrantee, and licenses. Finally, within the places grouping, the domain areas may include office locations and geographic divisions.

Some of these domain areas may be further divided. For example, the customer domain area may be further divided based on incentives and history, or a company may have regular customers in addition to premiere and executive customers. The product domain area may be further divided by sector and industry. For example, the requirements, life cycle, and create, read, update, and delete cycle for a product in the CPG sector are likely to be different from those of products in the clothing industry.

The granularity of domains is determined by the magnitude of differences between the attributes of the entities within the domains.

### 2.2.2 Format and Protocol Summary

The following table provides a comprehensive list of the formats and protocols that are used in the data portability scenarios.

Protocol or format name	Description	Reference
MDS	Master Data Services	<a href="#">[MS-SSMDSWS]</a>

Protocol or format name	Description	Reference
XML	Extensible Markup Language	<a href="#">[XML]</a>
Model Deployment XSD	Model Deployment Format XSD	<a href="#">[MSDN-MDPXS1]</a>

## 2.2.3 Data Portability Methodology

### Import

The process for importing a model deployment package into an MDS system is done through the Model Deployment Wizard UI. The wizard simplifies the task of deploying the package file. The following steps are performed to deploy the model deployment package:

1. After launching the wizard from the **System Administration** page in MDS, the user clicks **Deploy**, and then browses to the package file to deploy.
2. The package is uploaded and validated when the user clicks **Next**. If the package is successfully validated, the deployment process starts.
  - If the model that is contained in the package does not exist on the target system, the deployment process runs. The wizard handles the deployment process by calling the appropriate APIs. The details of the extraction are opaque to the user; an animated wait dialog is displayed during the extraction.
  - If the model that is contained in the package does exist on the target system, the user is presented with two choices. The user can apply the content of the package as an update of the model on the target or can choose to create a new model on the target by using the contents of the package. After this selection is made, the wizard handles the deployment process by calling the appropriate APIs. The details of the extraction are opaque to the user; an animated wait dialog is displayed during the extraction.
3. The process finishes. The user exits the dialog after the deployment is successful.

The XML in the file conforms to the XSD defined in [\[MSDN-MDPXS\]](#).

Using the model deployment API is similar to using the UI. The user calls the Deploy API, and then specifies the location of the package file. The API handles the deployment process in the same way that the UI does. The details of the deployment are opaque to the user.

### 2.2.3.1 Preconditions

To create the package by using the wizard, the user must have administrator permissions on the source system. To deploy the package, the user must have administrator permissions on the target system.

### 2.2.3.2 Versioning

This data portability scenario has no special versioning requirements. The data is versioned within MDS; if the user decides to include data in the package, the user selects the data version to include.

### 2.2.3.3 Error Handling

There are no special error handling requirements.



#### **2.2.3.4 Coherency Requirements**

There are no special coherency requirements.

#### **2.2.3.5 Additional Considerations**

There are no additional considerations.

## 3 Appendix A: Model Deployment XSD

### 3.1 Elements

The following section shows the individual elements for a package.

```
<?xml version="1.0" encoding="utf-8"?> <xs:schema
xmlns:a="http://schemas.microsoft.com/sqlserver/masterdataservices/2009/09"
xmlns:b="http://schemas.microsoft.com/2003/10/Serialization/Arrays"
xmlns:i="http://www.w3.org/2001/XMLSchema-instance" attributeFormDefault="unqualified"
elementFormDefault="qualified"
targetNamespace="http://schemas.datacontract.org/2004/07/Microsoft.MasterDataServices.Deployem
ent" xmlns:xs="http://www.w3.org/2001/XMLSchema">
  <xs:import namespace="http://schemas.microsoft.com/sqlserver/masterdataservices/2009/09" />
  <xs:element name="Package">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="businessRuleSet">
          <xs:complexType>
            <xs:sequence>
              <xs:element ref="a:BRActions" />
              <xs:element ref="a:BRConditionTreeNodes" />
              <xs:element ref="a:BRConditions" />
              <xs:element ref="a:BusinessRules" />
            </xs:sequence>
          </xs:complexType>
        </xs:element>
        <xs:element name="masterData" nillable="true" />
        <xs:element name="metadata">
          <xs:complexType>
            <xs:sequence>
              <xs:element ref="a:AttributeGroups" />
              <xs:element ref="a:Attributes" />
              <xs:element ref="a:DerivedHierarchies" />
              <xs:element ref="a:DerivedHierarchyLevels" />
              <xs:element ref="a:Entities" />
              <xs:element ref="a:ExplicitHierarchies" />
              <xs:element ref="a:MemberTypes" />
              <xs:element ref="a:Models" />
              <xs:element ref="a:VersionFlags" />
              <xs:element ref="a:Versions" />
            </xs:sequence>
          </xs:complexType>
        </xs:element>
        <xs:element name="settings">
          <xs:complexType>
            <xs:sequence>
              <xs:element name="assemblyVersion" type="xs:string" />
              <xs:element name="containsData" type="xs:boolean" />
              <xs:element name="createdBy" type="xs:string" />
              <xs:element name="createdDate" type="xs:dateTime" />
              <xs:element name="deploymentType" type="xs:string" />
              <xs:element name="productVersion" type="xs:string" />
              <xs:element name="version" type="xs:unsignedByte" />
            </xs:sequence>
          </xs:complexType>
        </xs:element>
      </xs:sequence>
    </xs:complexType>
  </xs:element>
</xs:schema>
```

```

    </xs:complexType>
  </xs:element>
</xs:schema>

```

## 3.2 Arrays

The following section shows how to serialize arrays for data elements that have multiple lines of data.

```

<?xml version="1.0" encoding="utf-8"?> <xs:schema
xmlns:a="http://schemas.microsoft.com/sqlserver/masterdataservices/2009/09"
xmlns:b="http://schemas.microsoft.com/2003/10/Serialization/Arrays"
xmlns:i="http://www.w3.org/2001/XMLSchema-instance" attributeFormDefault="unqualified"
elementFormDefault="qualified"
targetNamespace="http://schemas.datacontract.org/2004/07/Microsoft.MasterDataServices.Deployem
ent" xmlns:xs="http://www.w3.org/2001/XMLSchema">
  <xs:import namespace="http://schemas.microsoft.com/sqlserver/masterdataservices/2009/09" />
  <xs:element name="Package">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="businessRuleSet">
          <xs:complexType>
            <xs:sequence>
              <xs:element ref="a:BRActions" />
              <xs:element ref="a:BRConditionTreeNodes" />
              <xs:element ref="a:BRConditions" />
              <xs:element ref="a:BusinessRules" />
            </xs:sequence>
          </xs:complexType>
        </xs:element>
        <xs:element name="masterData" nillable="true" />
        <xs:element name="metadata">
          <xs:complexType>
            <xs:sequence>
              <xs:element ref="a:AttributeGroups" />
              <xs:element ref="a:Attributes" />
              <xs:element ref="a:DerivedHierarchies" />
              <xs:element ref="a:DerivedHierarchyLevels" />
              <xs:element ref="a:Entities" />
              <xs:element ref="a:ExplicitHierarchies" />
              <xs:element ref="a:MemberTypes" />
              <xs:element ref="a:Models" />
              <xs:element ref="a:VersionFlags" />
              <xs:element ref="a:Versions" />
            </xs:sequence>
          </xs:complexType>
        </xs:element>
        <xs:element name="settings">
          <xs:complexType>
            <xs:sequence>
              <xs:element name="assemblyVersion" type="xs:string" />
              <xs:element name="containsData" type="xs:boolean" />
              <xs:element name="createdBy" type="xs:string" />
              <xs:element name="createdDate" type="xs:dateTime" />
              <xs:element name="deploymentType" type="xs:string" />
              <xs:element name="productVersion" type="xs:string" />
              <xs:element name="version" type="xs:unsignedByte" />
            </xs:sequence>
          </xs:complexType>
        </xs:element>
      </xs:sequence>
    </xs:complexType>
  </xs:element>
</xs:schema>

```

```

        </xs:sequence>
      </xs:complexType>
    </xs:element>
  </xs:sequence>
</xs:complexType>
</xs:element>
</xs:schema>

```

### 3.3 Package Structure

The following section shows the full package structure.

```

<?xml version="1.0" encoding="utf-8"?> <xs:schema
xmlns:a="http://schemas.microsoft.com/sqlserver/masterdataservices/2009/09"
xmlns:b="http://schemas.microsoft.com/2003/10/Serialization/Arrays"
xmlns:i="http://www.w3.org/2001/XMLSchema-instance" attributeFormDefault="unqualified"
elementFormDefault="qualified"
targetNamespace="http://schemas.datacontract.org/2004/07/Microsoft.MasterDataServices.Deployem
ent" xmlns:xs="http://www.w3.org/2001/XMLSchema">
  <xs:import namespace="http://schemas.microsoft.com/sqlserver/masterdataservices/2009/09" />
  <xs:element name="Package">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="businessRuleSet">
          <xs:complexType>
            <xs:sequence>
              <xs:element ref="a:BRActions" />
              <xs:element ref="a:BRConditionTreeNodes" />
              <xs:element ref="a:BRConditions" />
              <xs:element ref="a:BusinessRules" />
            </xs:sequence>
          </xs:complexType>
        </xs:element>
        <xs:element name="masterData" nillable="true" />
        <xs:element name="metadata">
          <xs:complexType>
            <xs:sequence>
              <xs:element ref="a:AttributeGroups" />
              <xs:element ref="a:Attributes" />
              <xs:element ref="a:DerivedHierarchies" />
              <xs:element ref="a:DerivedHierarchyLevels" />
              <xs:element ref="a:Entities" />
              <xs:element ref="a:ExplicitHierarchies" />
              <xs:element ref="a:MemberTypes" />
              <xs:element ref="a:Models" />
              <xs:element ref="a:VersionFlags" />
              <xs:element ref="a:Versions" />
            </xs:sequence>
          </xs:complexType>
        </xs:element>
        <xs:element name="settings">
          <xs:complexType>
            <xs:sequence>
              <xs:element name="assemblyVersion" type="xs:string" />
              <xs:element name="containsData" type="xs:boolean" />
              <xs:element name="createdBy" type="xs:string" />
              <xs:element name="createdDate" type="xs:dateTime" />
              <xs:element name="deploymentType" type="xs:string" />
            </xs:sequence>
          </xs:complexType>
        </xs:element>
      </xs:sequence>
    </xs:complexType>
  </xs:element>
</xs:schema>

```

```
        <xs:element name="productVersion" type="xs:string" />
        <xs:element name="version" type="xs:unsignedByte" />
    </xs:sequence>
</xs:complexType>
</xs:element>
</xs:sequence>
</xs:complexType>
</xs:element>
</xs:schema>
```

## 4 Change Tracking

No table of changes is available. The document is either new or has had no changes since its last release.

## 5 Index

### C

[Change tracking](#) 14

### G

[Glossary](#) 4

### T

[Tracking changes](#) 14