Reference Data and Lookups Management in ERP Training Course

Professional Development Training Course Outline

Category	Enterprise Resource Planning (ERP)	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s dynamic business environment, accurate and well-managed reference data is the backbone of efficient Enterprise Resource Planning (ERP) systems. Reference Data and Lookups Management in ERP Training Course empowers professionals to master the critical processes of data governance, standardization, and validation, ensuring seamless operations across finance, procurement, HR, and supply chain modules. Participants will gain hands-on expertise in data quality management, master data maintenance, and system-driven lookup optimization, which are essential for driving operational efficiency, reducing errors, and enabling informed decision-making in modern organizations.

Through this course, learners will explore practical strategies, tools, and techniques to manage ERP reference data effectively, including data hierarchy design, lookup table configuration, and real-time data synchronization. Leveraging real-world case studies, the training demonstrates how leading organizations overcome challenges in data redundancy, inconsistency, and compliance. By the end of the program, participants will be able to implement best practices in reference data governance, contribute to ERP system optimization, and enhance overall enterprise data integrity.

Programme Curriculum

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Course Duration

5 days

Course Objectives

1. Understand ERP reference data architecture and its business impact.
2. Implement master data management (MDM) best practices in ERP systems.
3. Analyze and resolve data redundancy and inconsistency issues.
4. Configure and maintain lookup tables and code sets efficiently.
5. Apply data validation and standardization techniques.
6. Develop strategies for data governance and compliance.
7. Automate reference data updates using ERP workflows and scripts.
8. Optimize ERP system performance through clean and accurate data.
9. Perform data migration and integration with minimal disruption.
10. Monitor and audit reference data changes for quality assurance.
11. Leverage real-time analytics and reporting using accurate reference data.
12. Collaborate across departments to ensure consistent enterprise data standards.
13. Implement emerging trends in AI-assisted data management in ERP.

Target Audience

1. ERP Consultants and Functional Analysts
2. Data Governance Professionals
3. IT Managers and System Administrators
4. Finance and Accounting Specialists
5. Supply Chain and Procurement Professionals
6. HR Data Analysts
7. ERP Implementation Teams
8. Business Intelligence and Reporting Analysts

Course Modules

Module 1: Introduction to ERP Reference Data

- Definition and importance of reference data in ERP
- Key types of master and transactional data
- Data hierarchy and relationships
- Impact on operational efficiency and reporting
- Case Study: How a manufacturing company streamlined master data for faster procurement

Module 2: Data Governance and Compliance

- Principles of data governance in ERP
- Policies, standards, and roles for data management
- Regulatory compliance
- Data stewardship responsibilities
- Case Study: Banking industry implementation of data governance

Module 3: Lookup Tables and Code Sets Management

- Design and configuration of lookup tables
- Mapping codes to business processes
- Maintaining consistency across ERP modules
- Automating lookup updates
- Case Study: Retail company optimizing product category lookups

Module 4: Data Quality and Validation Techniques

- Data profiling and cleansing
- Validation rules and error handling
- Preventing duplication and inconsistency
- Data enrichment strategies
- Case Study: E-commerce company reducing invoice errors through validation

Module 5: Master Data Lifecycle Management

- Creation, maintenance, and archiving
- Versioning and history tracking
- Role-based access control for updates
- Change management processes
- Case Study: Pharmaceutical firm managing product master data lifecycle

Module 6: ERP Integration and Data Migration

- Data migration best practices
- ETL processes and tools
- Integration with external systems
- Maintaining integrity during migration
- Case Study: Global ERP rollout in an automotive supply chain

Module 7: Automation and Workflow Optimization

- Automated workflows for reference data approval
- Scheduling and triggers for updates
- Using scripts and macros for repetitive tasks
- Reducing manual errors and improving efficiency
- Case Study: Telecom company automating client reference data updates

Module 8: Advanced Analytics and AI in Reference Data

- Leveraging AI for anomaly detection in data
- Predictive analytics for data maintenance

- Reporting dashboards for decision-making
- Emerging tools for AI-assisted ERP management
- Case Study: Logistics company using AI to predict master data inconsistencies

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

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