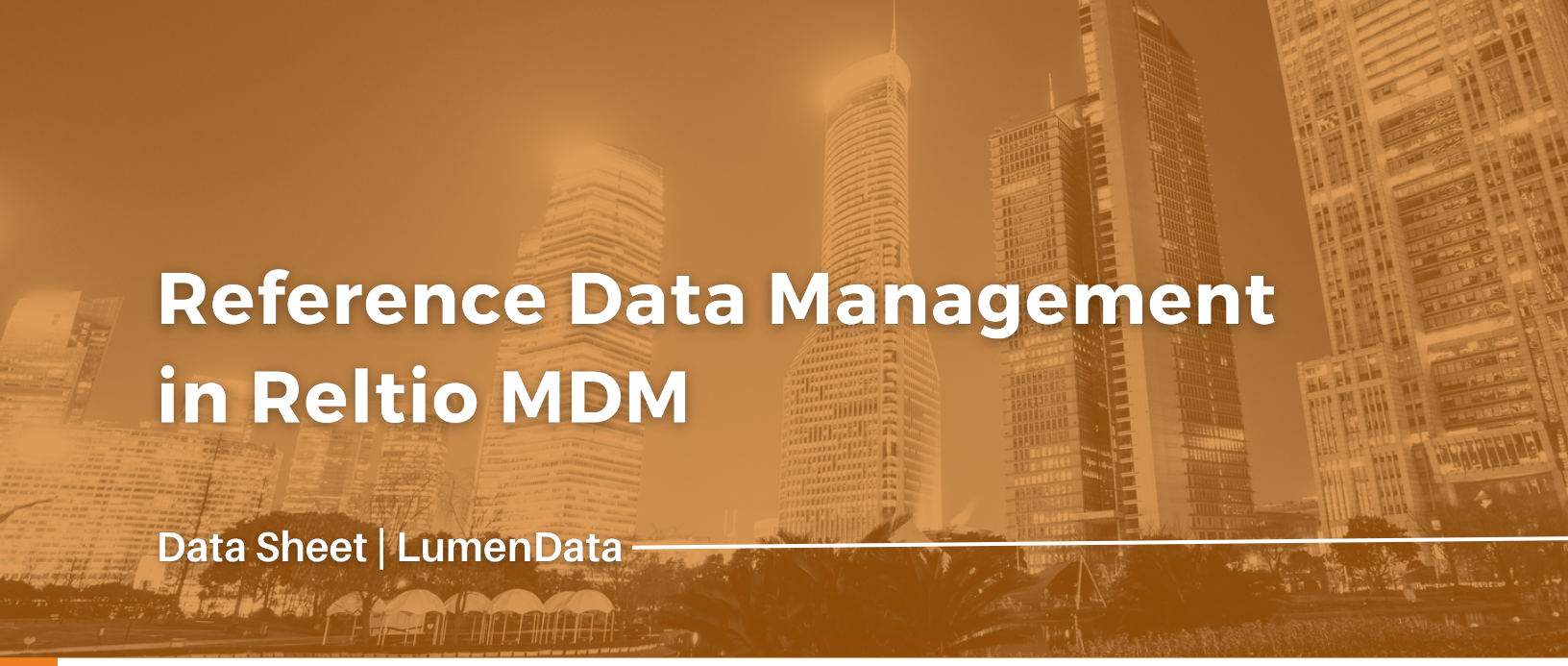


Reference Data Management in Reltio MDM

Data Sheet | LumenData

Creating connections in IICS

Reference data is a slow-changing data. For example, Country Names, State Names, Gender, etc. This data rarely changes. As Reltio combines multiple source systems data, it is required to have uniform data for all Reference Data. For instance, Source A has gender values as Male, Female &, others while Source B has gender values as M, F & O. So, it will be very complex to maintain all these data values from all the sources. Here comes the RDM (Reference Data Management) where we will map all these values to the hard coded values known as canonical values. Every time we fetch a record in UI, we will see only these canonical values which will be uniform irrespective of source system. This is explained in detail later in the document.

A reference data management tool is a mechanism that defines business processes around reference data and helps data stewards populate and manage it over time. It automates workflows to create new codes and code sets and delivers codes and code sets to data users.

LUMENDATA
Masters in Data Management

In the world of data management, reference data is the data that is found in what are typically called type fields which appear in records within transactional systems.

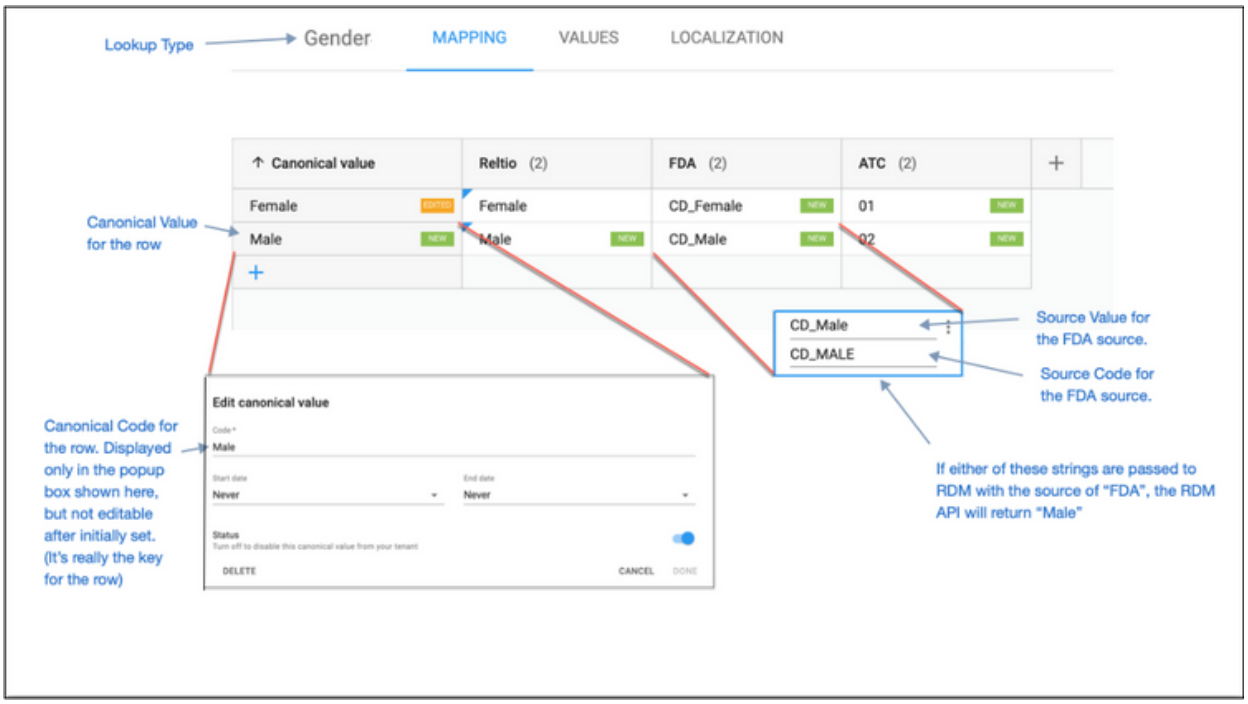
- Gender codes.
- State codes.
- Country codes.
- Specialty codes.
- Account types.
- SIC codes.
- Medical codes.

Reference data and lists of values are stored in RDM as lookups. The different reference data sets from various sources are standardized. This data is later looked up or referenced by Reltio MDM when creating or editing entities.

Lookup Types and Canonical Values

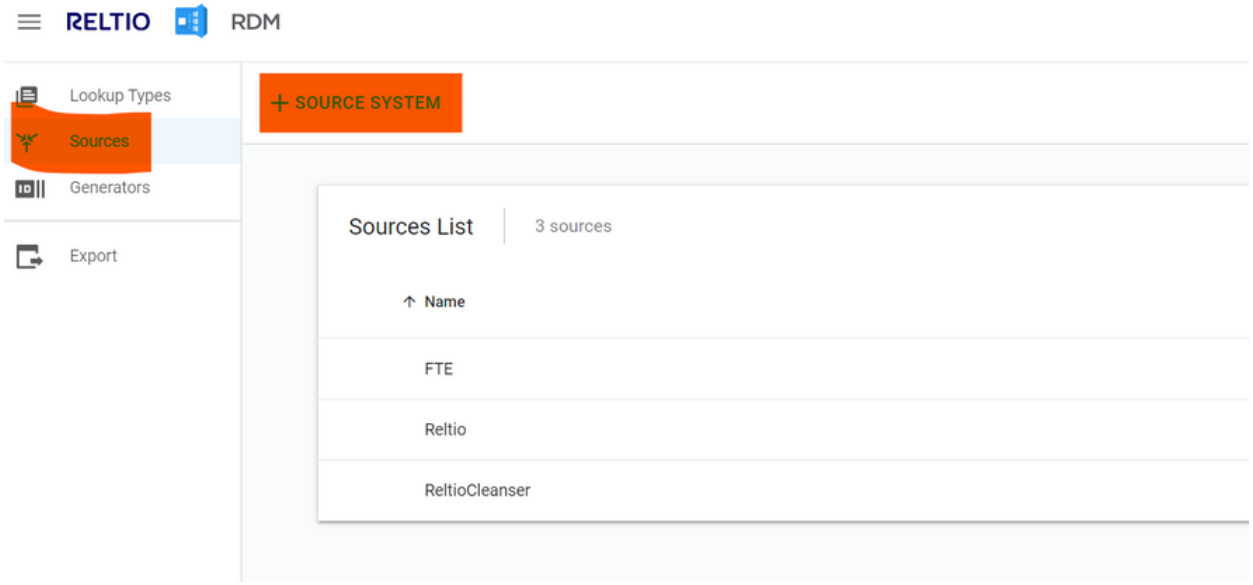
In a typical application landscape, various systems will each have their own set of values they use for common semantic ideas. For example, Gender is a common attribute across many systems, but the value representing females in system A might be 01; in system B it can be F, and in system C, it can be CD Female. If your MDM tenant receives data from these three systems, without the aid of RDM, three different values might accumulate within the gender attribute of a merged record. Of these three values, any one of them may appear for the Gender field in Hub. And in this unconfirmed state, queries become challenging because all three values must be queried to find records representing females. Also, a search facet based on Gender will display all three values, which again is challenging and undesirable.

Instead, RDM allows you to define a Lookup Type called Gender that can be used to transcode the source values into a single Canonical value. Once you create a Lookup Type, within it, you then define Canonical Rows, each one specifying a Canonical value you wish to standardize. This value is then associated with each of the values from various source systems. In this example, you might create a Canonical Row that represents the female Gender and has a canonical value of Female. You can then associate this value with the values of 01, F, and CD Female being provided by the three-source systems A, B, and C respectively.

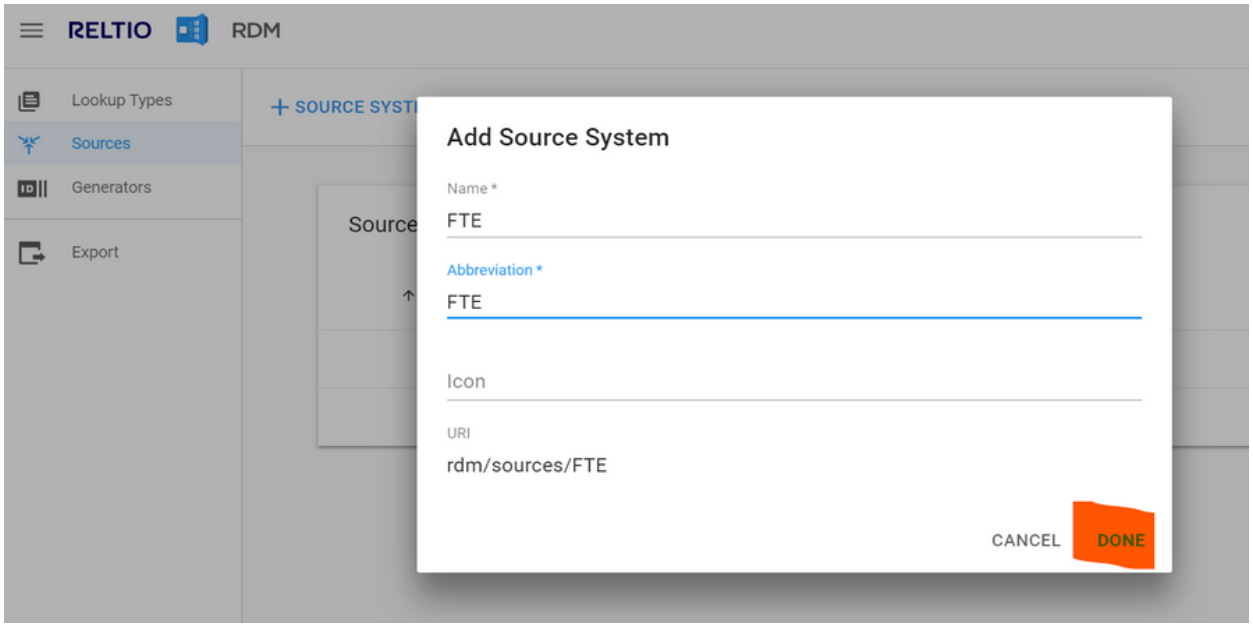


Adding Source System

1. Click Sources and add Source system.

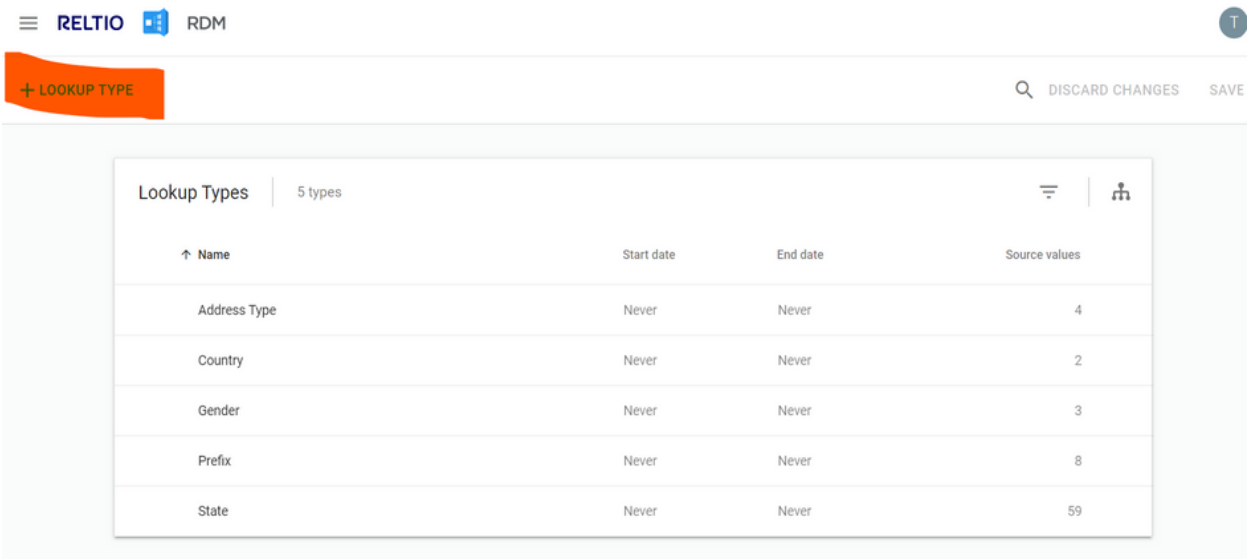


2.

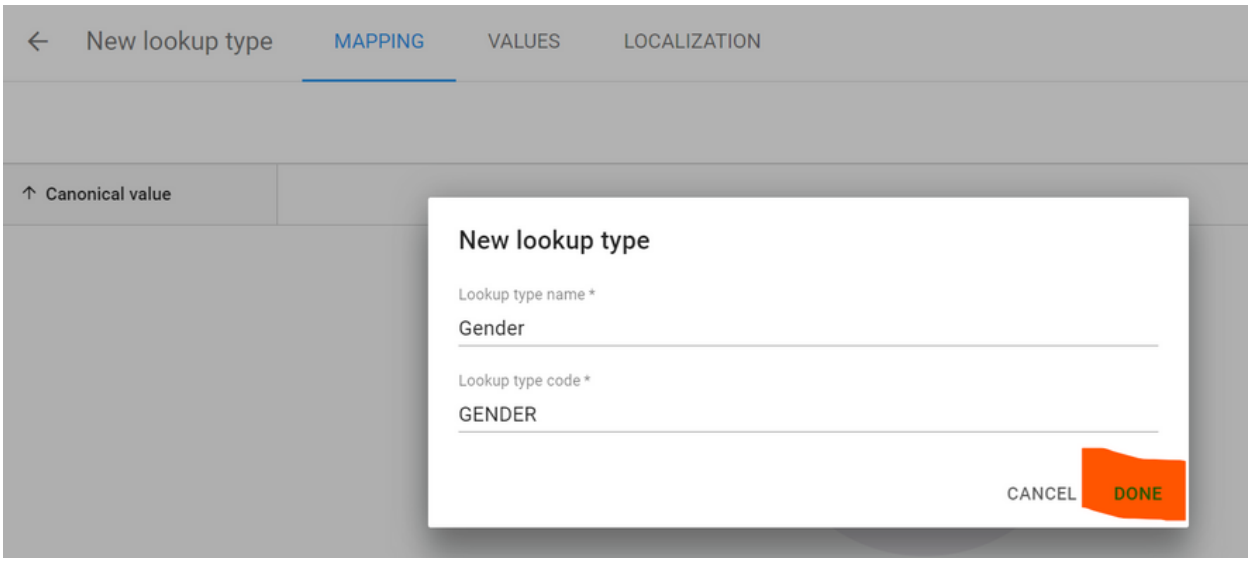


Creating New Lookups and Canonical Rows

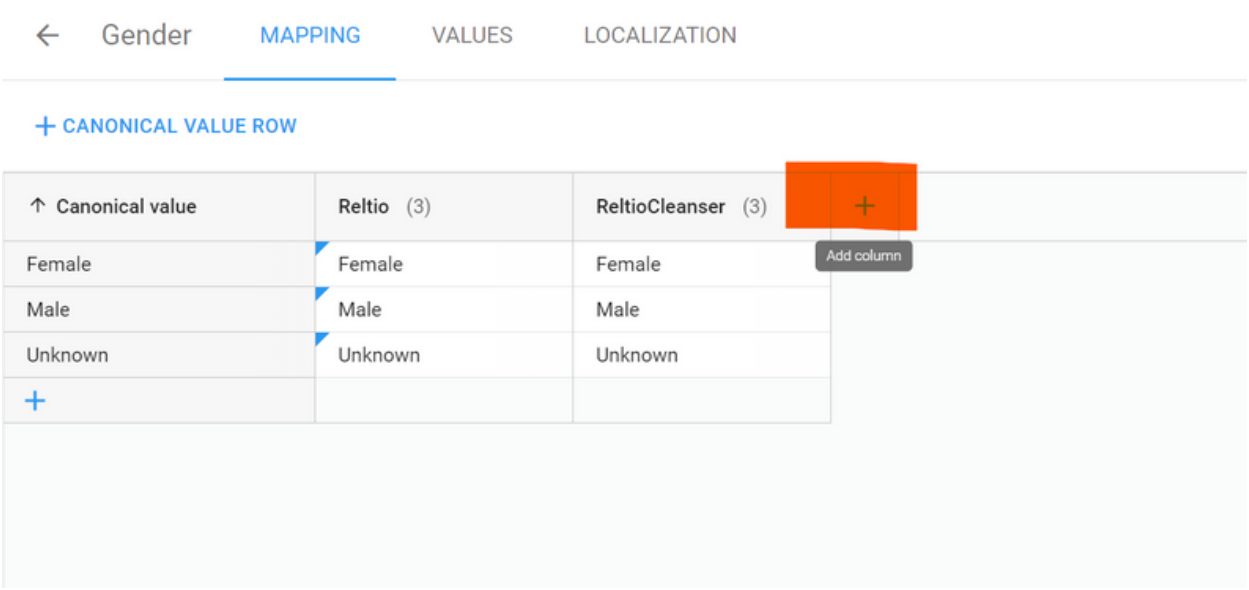
1. Click Lookup TYPE



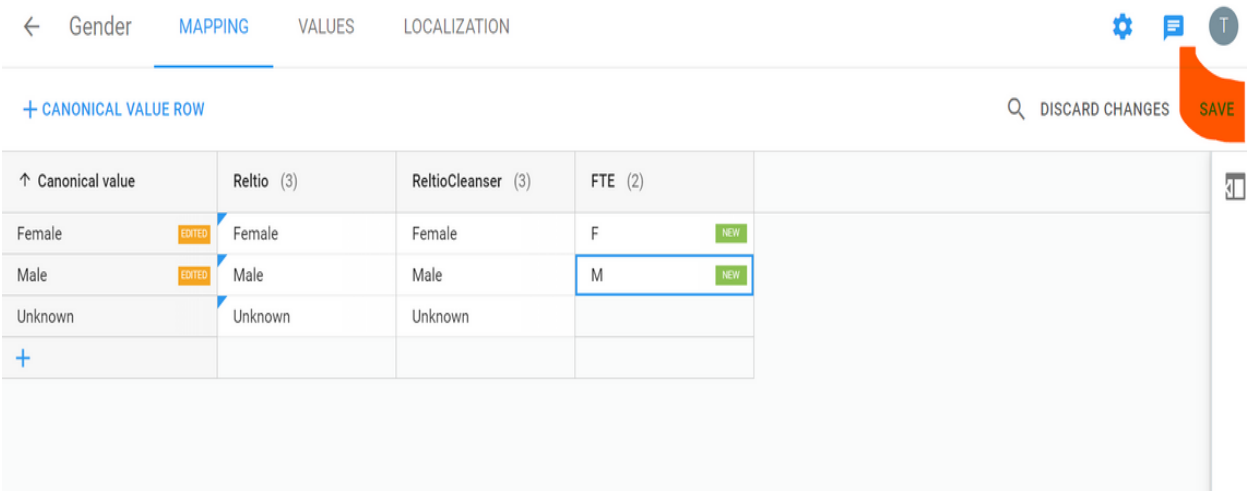
2. Enter Lookup name and click save.



3. We can add Source columns by clicking add column.



4. Add Canonical values for required source systems.



RDM stores additional information with each Lookup Code definition, such as:

- Source Mapping
- Hierarchy
- Localization

Dependent Lookups

When we have data that is driven by other data - for example, a list of states/regions/cities depends on the country.

Special features of dependent lookups:

- One dependent lookup value can belong to multiple dependent values - for example, MD (specialty - medical doctor) exists in multiple countries. Some specialties can be in multiple countries, while other specialties can belong only to one country.
- There can be multiple level dependent lookups over a sequence of dependent lookups when one lookup drives another one, then another - for example, Continent > Country > State > County > City.
- Simple, nested, and reference attribute elements can be driven by simple attributes.

Users can work with dependent and non-dependent lookups in Edit mode. Users cannot edit a dependent lookup value that does not have an attribute value for the attribute on which it depends. Upon saving a profile, the system performs validation of dependent lookup values: if a dependent lookup is not filled, it will be highlighted on the page with a corresponding message.

ABOUT LUMENDATA:

LumenData is a leading provider of Enterprise Data Management, Cloud & Analytics solutions. We help businesses navigate their data visualization and analytics anxieties and enable them to accelerate their innovation journeys. Founded in 2008, with locations in multiple countries, LumenData is privileged to serve over 100 leading companies, including KwikTrip, Versant Health, US Food & Drug Administration, US Department of Labor, Cummins Engine, BCG, and others. LumenData is SOC2 certified and has instituted extensive controls to protect client data, including adherence to GDPR and CCPA regulations.

Get in touch to discuss how we can facilitate data-driven transformation for your organization.

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