# DBI Standards for Database and Tableau

001- Line Activations

# **Reference and Master Data Management**

#### **Document Data**

Project Name	Reference and Master Data Management	
Project Number		
Document type	Reference and Master Data Management	
First issued	03/31/2023	
Current Version	0.01	

### **Basic Information**

Project Name	Reference and Master Data Management		
Estimate Start Date	1/31/2022 Actual Start Date 1/31/2023		
Project Manager	Saif M. Alqahtani		

### Purpose

To describe Reference and Master data management Process, Requirements, Data Hub design and conceptual architecture.



# Table of Contents

# Contents

Basic	c Information	1
Purp	oose	1
Table	e of Contents	2
1-	Introduction	3
1.1 F	Reference and Master Data Management (RDM):	3
1.2 F	Reference Data Identification and Prioritization:	3
1.3 N	Master data Identification and Prioritization:	7
2-	Reference and Master Data Requirements	8
2.1 F	Reason for Reference and Master Data	8
2.3	Rules for mapping Reference and Master Data:	10
2.3	3.1 Identification of Reference Data:	10
2.3	3.2 Matching Method and Types:	10
2.3	Reference Data Consideration:	10
2.3	3.4 Authority Strategy:	11
2.3	3.5 Consolidation:	11
2.4	Consume Applications:	11
2.5	Data quality requirements for Reference and Master Data:	11
3-	Reference Data HUB Design	14
3.1	Reference Data Design	14
3.2	Reference Data Structure:	15
3.3	Master Data Hub Design:	18
3.4	Dm Profile Structure:	19
3.5	Unique Profile Structure:	21
3.6	Profile Timeline Structure:	22
4-	RMD Conceptual Architecture	24
4.1	Components of Reference Data Model:	24
4.2	Reference and Master Data Conceptual Model:	25



#### 1- Introduction

#### 1.1 Reference and Master Data Management (RDM):

In any organization, certain data is required across departments and applications. The whole organization and its departments benefit if this data is shared and all business units can access the same set of data lists like geographic location (city), country, regions, specialties, etc. these data used to run the business.

In SCFHS various project and initiatives, mergers and acquisition and other business activities result in multiple systems executing essential the same functions, which different from each other. These situations inevitably lead to inconsistence in data structure and data values between systems. This variability increase cost and risk. Both can be reduced through the management of Reference and Master Data.

Main goal of reference data to reduce redundancy, ensure high quality and effective use of analytics and reports in organizations. In addition, integration between different application make easier and each system would talk to each other.

Implementing RDM in SCFHS to make sure, the ability to leverage core transactional data is highly dependent on the availability and quality of Reference and Master Data and it would dramatic impact on overall quality of the data and business confidence in data.

#### 1.2 Reference Data Identification and Prioritization:

In SCFHS identified 28 Reference data across around 40 different data sources.

The following are list of Reference data and its preference:

# No	Data Entity	Data Source	Preferred Source	Internal/External
1	Case Status	Mumaris Plus	Mumaris Plus	Internal
2	Cities	<ol> <li>Academy</li> <li>Appointments Booking</li> <li>Assessment</li> <li>Collaboration</li> <li>Committees</li> <li>Financial Compensation</li> <li>Health Academy</li> <li>Health Academy         <ul> <li>Nomination</li> </ul> </li> <li>HLS</li> <li>HR</li> <li>HRSD</li> <li>Law Affairs</li> <li>Leadership Academy</li> <li>LMS</li> <li>Matching</li> <li>Matching Fellowship</li> <li>MOE</li> <li>MOH</li> </ol>	Mumaris Plus	Internal



		19. Mumaris Plus		
		20. Mustamir		
		21. One45		
		22. Portal		
		23. Training		
		24. Well Being		
3	Classification	1. Mumaris Plus	Mumaris Plus	Internal
	Rank	2. Mustamir		
		3. Portal		
4	Committees	1. Committees	Committees	Internal
		2. Mumaris Plus		
5	Councils	Committees	Committees	Internal
6	Countries	1. Academy	Mumaris Plus	Internal
		2. Appointments Booking		
		3. Assessment		
		4. Collaboration		
		5. Financial Compensation		
		6. Hadir		
		7. Health Academy		
		8. Health Academy		
		Nomination		
		9. HR		
		10. HRSD		
		11. LMS		
		12. Matching		
		13. Matching Fellowship 14. MCS		
		15. MOE		
		16. MOH		
		17. Mumaris Plus		
		18. Mustamir		
		19. NGHA		
		20. One45		
		21. Portal		
		22. Training		
		23. Well Being		
7	Exam Status	Mumaris Plus	Mumaris Plus	Internal
8	Exam Result	1. Mumaris Plus	Mumaris Plus	Internal
	Types	2. Training		
9	Exam Sections	Integration		External
10	Exams	1. Matching	Mumaris Plus	Internal
		2. Mumaris Plus		
		3. Portal		
11	Gender	1. Appointments Booking	Mumaris Plus	Internal
		2. Health Academy		
		3. HR		
		4. HRSD		



		<ul><li>5. Leadership Academy</li><li>6. Matching</li></ul>		
		<ul><li>7. Matching Fellowship</li><li>8. MOE</li><li>9. Mumaris Plus</li><li>10. Mustamir</li></ul>		
		11. NGHA 12. One45 13. Portal 14. Statistics		
12	Health Association	<ul><li>15. Training</li><li>1. Association Sheets</li><li>2. Portal</li></ul>	Health Association	Internal
13	Marital Status	<ol> <li>Health Academy</li> <li>HR</li> <li>Mumaris Plus</li> </ol>	Mumaris Plus	Internal
14	Medical Fields	<ol> <li>Appointments Booking</li> <li>Internship Capacity         Sheet</li> <li>Matching</li> <li>MLSD</li> <li>Mumaris Plus</li> <li>Mustamir</li> <li>Nurse Visa</li> <li>Portal</li> <li>Training</li> </ol>	Mumaris Plus	Internal
15	Organization Sites	<ol> <li>Appointments Booking</li> <li>Committees</li> <li>GL</li> <li>Hadir</li> <li>HR</li> <li>Portal</li> </ol>	HR	Internal
16	Organization Units	<ol> <li>Collaboration</li> <li>Committees</li> <li>GL</li> <li>Hadir</li> <li>HR</li> <li>Portal</li> <li>Service Desk</li> <li>TAWASOL</li> </ol>	HR	Internal
17	Regions	<ol> <li>Appointments Booking</li> <li>Elham</li> <li>Health Academy</li> <li>HLS</li> <li>HRSD</li> <li>Mustamir</li> <li>Statistics</li> </ol>	Training	Internal



		8. Training		
18	Religions	<ol> <li>HR</li> <li>Mumaris Plus</li> </ol>	Mumaris Plus	Internal
19	Saudi Colleges Branches	Portal	Portal	Internal
20	Specialties	<ol> <li>Elham</li> <li>Health Academy         Nomination</li> <li>Matching</li> <li>Matching Fellowship</li> <li>MOE</li> <li>Muetamid</li> <li>Mustamir</li> <li>One45</li> <li>Portal</li> <li>Press Ganey Survey</li> <li>Training</li> <li>Well Being</li> </ol>	Training	Internal
21	Specialties Mumaris	Mumaris Plus	Mumaris Plus	Internal
22	State Code	Mumaris Plus	Mumaris Plus	Internal
23	Training Center	<ol> <li>Health Academy</li> <li>Matching</li> <li>Matching Fellowship</li> <li>Muetamid</li> <li>One45</li> <li>Portal</li> <li>Press Ganey Survey</li> <li>Training</li> <li>Well Being</li> </ol>	Muetamid	Internal
24	Training Exam Type	<ol> <li>Portal</li> <li>Training</li> </ol>	Training	Internal
25	Training Sector	<ol> <li>Health Academy Nomination</li> <li>Matching</li> <li>Matching Fellowship</li> <li>Muetamid</li> <li>One45</li> <li>Training</li> </ol>	Muetamid	Internal
26	Universities	<ol> <li>Health Academy</li> <li>Health Academy         <ul> <li>Nomination</li> </ul> </li> <li>HRSD</li> <li>Matching</li> <li>Matching Fellowship</li> <li>MOE</li> <li>Mumaris Plus</li> </ol>	Mumaris Plus	Internal



		8. Portal			
		9. Training			
27	University	Mumaris Plus	Mumaris Plus	Internal	
	Branches	Portal			
28	Work Place	1. Academy	MOH	External	
		2. Committees			
		3. Health Academy			
		Nomination			
		4. HLS			
		5. HRSD			
		6. Internship Capacity			
		Sheet			
		7. LMS			
		8. Matching			
		9. Matching Fellowship			
		10. MCS			
		11. MLSD			
		12. MOE			
		13. MOH			
		14. Mumaris Plus			
		15. NGHA			
		16. Portal			
		17. Public Relations			
		18. Training			
		19. Well Being			

### 1.3 Master data Identification and Prioritization:

# No	Data Entity	Data Source	Preferred Source	Internal/External
1	Unique	1. Mumaris Plus	Mumaris Plus	Internal
	Profile(Practitioners)	2. E Service		
		3. Training		
		4. Matching		
		5. One45		
		6. Oracle HR		
		7. Majales-Committee		
		8. Health Academy		



#### 2- Reference and Master Data Requirements

Application and data evolve organically resulting in multiple systems executing similar functions isolated from each other, leading to inconsistencies in data structure and values, and increased costs and risks. Both can be reduced through the management of reference and master data

In addition to that, the following are main goal:

- 1. Sharing of same unified data to all applications within an organization
- 2. Reference and Master data enable accurate values and reduce duplicate from same or multiple data sources
- 3. Reduce the complexity of Integration and data models

#### 2.1 Reason for Reference and Master Data

Consider the Country table from different application has more than one standards and following different coding system and description.

The following are example from SCFHS country table from more than 30 application including internal and external data.

The data structure describe as follows:

- 1. Data Entity describe the reference entity name
- 2. ID Primary Key of country Reference master data
- 3. **Name** unique name country
- 4. Data Source -describe about the list of application name from where the data is populated
- 5. Old Record Id source data primary key
- 6. Old Record Name Source data description
- 7. Old Extra Info1 Additional information
- 8. **Map Id** each source has unique Map Id and configuration about mapping between source and Reference Master data
- 9. Mapping Title Describe source application name from where the data is arrived



The following sample describe the same country name"Saudi Arabia" has referred as different code in each system and even different formations.

Data Entity	ID	Name	Data Source	Old Record Id	Old Record Name	Old Extra Info1	Map Id	Mapping Title
			Mumaris Plus	883470F7-5DF9-E811- B80F-005056AD2FD8	السعودية	Saudi Arabia	3	Countries From Mumaris+
			Academy	SA	SA		92	Countries From Academy
			Appointments Booking	Saudi Arabia	Saudi Arabia		125	Nationalities From Appointments Booking
Countries	1	Saudi Arabia	Training	1	السعودية	Saudi Arabia	4	Nationalities From Training
			Appointments Booking	المملكة العربية السعودية	المملكة العربية السعودية		125	Nationalities From Appointments Booking
			Assessment	Saudi Arabia	Saudi Arabia		79	Countries From Assessment Testing Centers Excel
			Collaboration	37	Saudi Arabia		99	Countries From Collaboration
			Collaboration	59	Saudi		102	Nationality From Collaboration
			Financial Compensation	SA	المملكة العربية السعودية	Saudi Arabia	169	Nationalities From Financial Compensation



#### 2.3 Rules for mapping Reference and Master Data:

The definition of creating rules to construct reference data would be as follows:

- 1. Identification of Reference data
- 2. Matching Method and Types
- 3. Considerations
- 4. Authority Strategy
- 5. Consolidation

#### 2.3.1 Identification of Reference Data:

Data is typically **replicated in multiple silos** (databases, Excel spreadsheets, etc.) the same set of data spread across the enterprise with different coding and descriptions. This affects the quality, consistency, and availability of data. Data quality issues lead to failures in business processes and transactions. Hence, identify the entity, which requires Reference data treatment.

#### 2.3.2 Matching Method and Types:

There are different types of matching that can be accomplished from automated rules to match data together, or have it gone through a review process.

There are variety of matching types possible, from exact matching and Similarity matching.

Exact Match: An exact match relies on being able to link two different sources of information based on the existence of a specific key that allows to match the information. This can be, for instance, a Country Name for country.

Similarity Match: Matching based on similar names of spellings to classify into same group When this happens, we need to be able to relax the matching algorithm to handle phonetically similar cases.

SCFHS follows both mentioned matching methods to create reference data

#### 2.3.3 Reference Data Consideration:

There has to be multiple considerations to have when looking at the merging of data. Entities can have multiple names, languages can be impactful in the cases of names, places, or universities, data should be normalized, and data cleansing is usually necessary before matching the different attributes

When Name used to match one of the important factors has to take into consideration is that frequency of name. If the names are common should need special treatment by considering other columns to take proper merging either auto match or manually.

SCFHS follow these mentioned consideration while doing the merging of Reference data.

In addition to that match different text fields also requires some degree of data cleansing. From handling potential trimming of spaces, special characters, and punctuations to correcting misspellings, there are numerous steps to take to standardize the input and allow it to find an accurate match.



The SCFHS has more than 30 profile rules to do cleansing any kind of data based on data type and nature of the data.

#### 2.3.4 Authority Strategy:

If the same set of data available and when conflicting information available in more than one application and database the Authority strategy help to define which source and field in the strategy should be considered as the authoritative source of information.

SCFHS follows preference order for taking certain types of information from different sources. The logic behind this type of strategy is that some sources of information should be considered as "trusted sources," while others have information of different qualities

#### 2.3.5 Consolidation:

The consolidation rule describe how the records are merged. There are generally two different types of consolidation strategies hard merge and soft merge. The hard merge consolidate multiple records into one single record, while a soft merge strategy creates an association between the different records that, when read, should be grouped.

SCFHS handle the hybrid based on nature of data, sometimes there might by one row for more than one same set of names.

#### 2.4 Consume Applications:

Most of the data-sharing request are utilized Reference and Master Data. In addition to that 1000+dashboards and reports are consuming Reference and Master data.

SCFHS Exchange database support other department to utilize the Reference and master data for various functions.

In addition to that public dashboard also using dimension and filter from Reference Master Data

#### 2.5 Data quality requirements for Reference and Master Data:

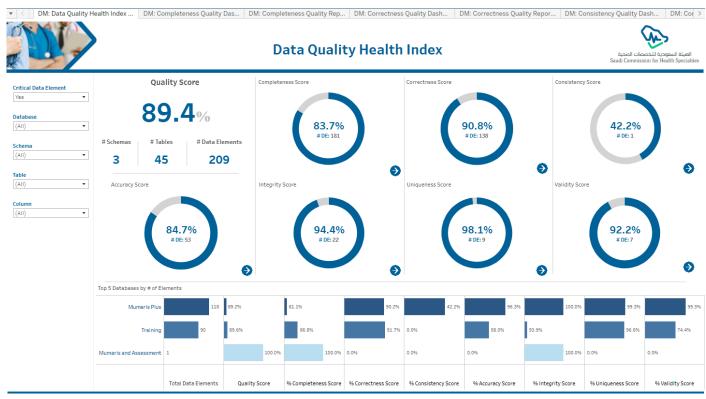
In the data quality, one of the data quality dimension Accuracy is used to handle reference and transaction data integration.

The degree to which data correctly describes the "real world" object or event being described. Can be derived from whether a given value is the same as in the 'master' dictionary

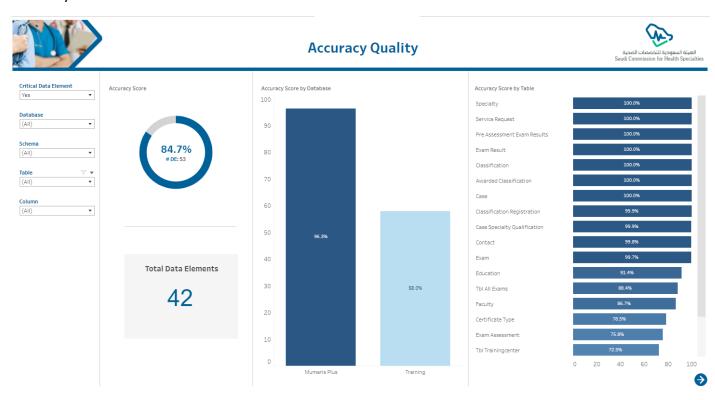
Reference: Missing data is not included in this measurement. For example, does the university reflect the actual university name stored in the qualification data set. This accuracy is measured for fact data using dimensions

Dashboard shows data quality over all health index and accuracy dimension:





#### **Accuracy Dimension:**



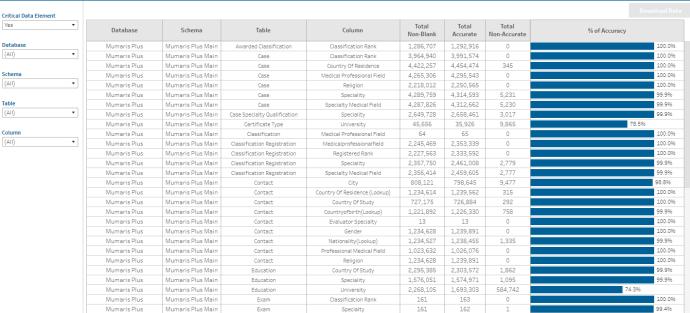


#### **Accuracy Dimension Detail Report:**



#### **Accuracy Quality Details**







#### 3- Reference Data HUB Design

SCFHS Hub Design support Centralized management of Reference Data - the Hub acting as single source provider for entire Reference Data to create and modify exclusively in the Hub. All dashboard, data sharing, and exchange database users utilize the Reference Data.

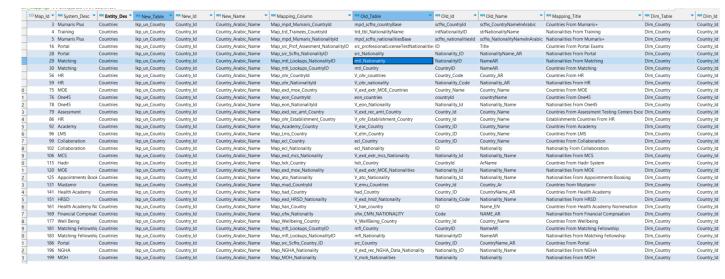
In SCFHS Hub design is maintained in EDW layer with full functionality of Reference data which read all the data sources from Hub layer.

#### 3.1 Reference Data Design

Reference data has been follows typical methodology to create accurate data from different data source.

- 1. Identify the reference data
- 2. Entry in MDM(Master data management) configuration table which requires mapping manually by defining the source schema and table name to map with reference table, which is start with "lkp un".

For ex. Countries Reference table name is lkp\_un\_Country" and the source mapping table name is (old table) "mpd\_scfhs\_countryBase", old id is scfhs\_CountryId (Primary key from source) and old name is scfhs\_CountryNameInArabic (country name from source) which is going to link with lkp\_un\_country table



- 3. Create mapping column in respective reference table which is used as mapping column(Map\_mpd\_Mumaris\_CountryId) between source and target in lkp\_un\_country table
- 4. Auto match algorithm is used to fill the mapping data automatically if the names are similar between reference table and source table
- 5. Finally the mapping configuration procedure (dq\_store\_map\_data) will collect all the matching records and keep it in valid map record table
- 6. Manually has to maintain the mapping for those records not matched automatically

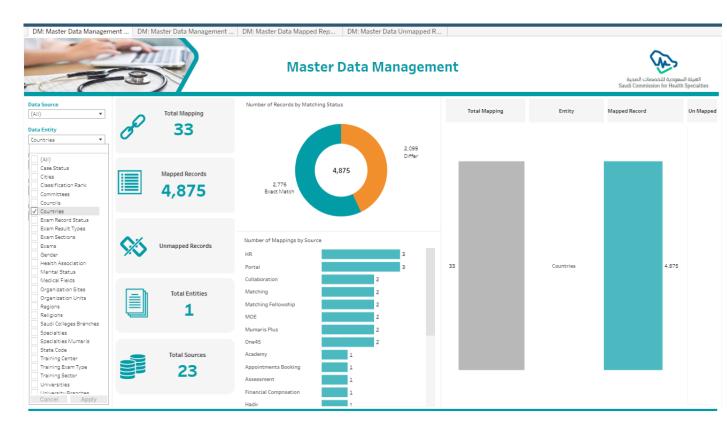


#### 3.2 Reference Data Structure:

Any reference data should normally describe about pairs a code value with description. The code value is Primary Key and description states definition

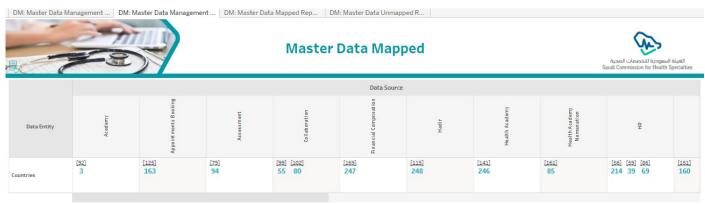
Country Id	Name_En	Name_Ar
0	Unknown	غير معرف
1	Saudi Arabia	السعودية
2	Egypt	مصر
3	Germany	ألمانيا

Dashboard shows country entity data mapping details, so far 33 different data sources are mapped with Country reference data and around 4800 records are mapped.

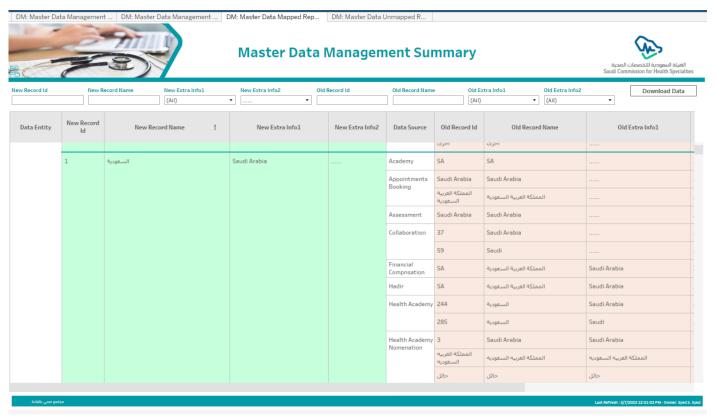


Dashboard shows how many records are mapped to country Reference data from each data source:



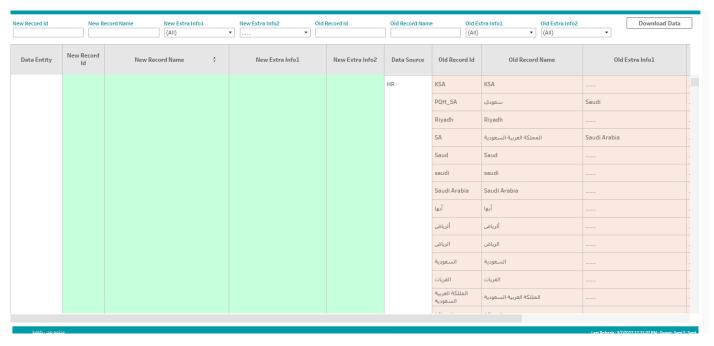


Mapping between different source to Country Reference data for Saudi Arabia:

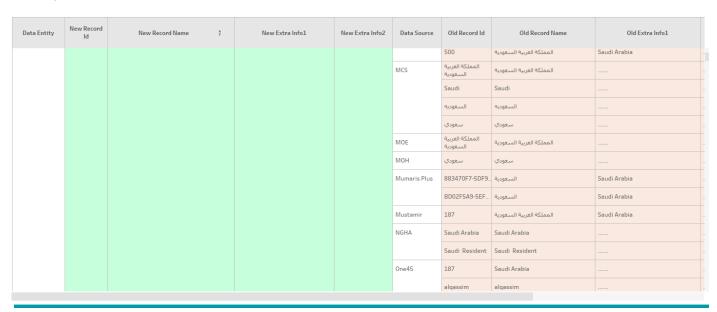


Contd.,



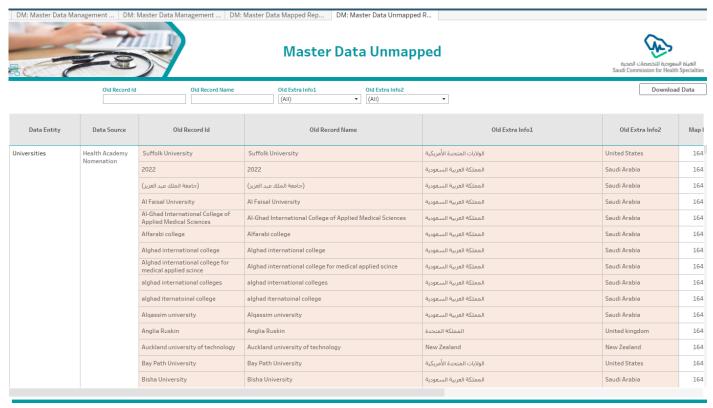


#### Contd.,



List of un mapped records from University Reference which need to map: Using this dashboard all unmapped records are mapped to Reference table as daily operational work.





#### 3.3 Master Data Hub Design:

SCFHS has beneficiary master data derived from different data sources. Beneficiary could be practitioners, trainee, license exam student, etc.,

The design phase consists of three steps;

- 1. Integrate master records using **Identity Number** (National Id) from different sources the SCFHS has dm profile table to keep all the similar beneficiary records
- 2. Based on data source preference the golden records are generated and stored in unique profile mart
- 3. In addition to that collect and keep the transaction about the beneficiary from all the preferred data sources.

The master data preference is about to ordering based on trusty source, in this case Mumaris plus is the first preference and other data source preference and order as follows:

- a. Mumaris-Profile
- b. Portal-Profile
- c. Training-Profile
- d. Matching-Profile
- e. One45-Profile



- f. OracleHR-Employee
- g. Majales-Member
- h. Health-Academy-Trainee

#### 3.4 Dm Profile Structure:

The structure of dm profile master data consists of all the similar data set from different data source as follows. More than one record for the same beneficiary from different sources.

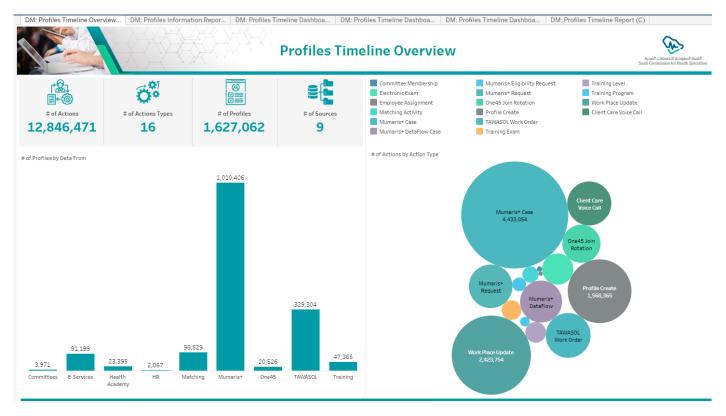
#No.	Column Name	Description
1	Hash_Column	Hash column for the table
2	Data_From	Mumaris+/E-Services/Training/
		Matching/One45/HR/Majales/Health Academy
3	System_Id	PK of source table
4	Identity_Number	National Id
5	Profile_Id	Profile Id
6	Profile_Link	Describe source data from
7	Full_Name_En	Full name of beneficiary in Latin
8	Full_Name_Ar	Full name of beneficiary in Arabic
9	Mobile_Number	Mobile Number
10	Email	Email
11	Birth_Date	Date of Birth
12	Gender_Code	Gender Code
13	Gender_Name_En	Gender Name in Latin
14	Gender_Name_Ar	Gender Name in Arabic
15	Nationality_Code	Nationality Code
16	Nationality_En	Nationality Name in Latin
17	Nationality_Ar	Nationality Name in Arabic
18	Nationality_Type_En	Nationality Type in Latin
19	Nationality_Type_Ar	Nationality Type in Arabic
20	Speciality_Id	Speciality Code
21	Speciality_Name_En	Speciality Name in Latin
22	Speciality_Name_Ar	Speciality Name in Arabic
23	Medical_Field_Id	Medical Field Code
24	Medical_Field_Ar	Medical Field Name in Latin
25	Medical_Field_En	Medical Field Name in Arabic
26	University_Id	University Code
27	University_Name_En	University Name in Latin
28	University_Name_Ar	University Name in Arabic
29	College_Id	College Code
30	College_Name_En	College Name in Latin
31	College_Name_Ar	College Name in Arabic
32	Other_University_Name	Other University Name
33	University_Branch_Id	University Branch Code
34	University_Branch_Name_Ar	University Branch Name in Latin
35	University_Branch_Name_En	University Branch Name in Arabic
36	Graduation_Year	Graduation Year



37	Dwh_Id	Exam source ID
38	Loading_Date	Data of Last Refresh
39	Profile_Priority	Priority based on trust order
40	Profile_Column_Name	Data source table and column name
41	Profile_Status	Practitioner current registration status
42	Profile_Create_Date	Profile Creation Date

The following dashboard describe about name of the source system where the beneficiary data are extracted to keep all beneficiary data.

In this case we have around 9 applications where the data is extracted.





### 3.5 Unique Profile Structure:

Only one golden records from dm profile to treat as master records.

The structure of golden master data are as follows:

#No.	Column Name	Description
1	Hash_Column	Hash column for the table
2	Data_From	Mumaris+/E-Services/Training/
		Matching/One45
3	System_Id	PK
4	Identity_Number	National Id
5	Profile_Id	Profile Id
6	Profile_Link	Data Source
7	Full_Name_En	Full name of practitioners in Latin
8	Full_Name_Ar	Full name of practitioners in Arabic
9	Mobile_Number	Mobile Number
10	Email	Email
11	Birth_Date	Date of Birth
12	Gender_Code	Gender Code
13	Gender_Name_En	Gender Name in Latin
14	Gender_Name_Ar	Gender Name in Arabic
15	Nationality_Code	Nationality Code
16	Nationality_En	Nationality Name in Latin
17	Nationality_Ar	Nationality Name in Arabic
18	Nationality_Type_En	Nationality Type in Latin
19	Nationality_Type_Ar	Nationality Type in Arabic
20	Speciality_Id	Speciality Code
21	Speciality_Name_En	Speciality Name in Latin
22	Speciality_Name_Ar	Speciality Name in Arabic
23	Medicalfield_Code	Medical Field Code
24	Medicalfield_Ar	Medical Field Name in Latin
25	Medicalfield_En	Medical Field Name in Arabic
26	Universityid	University Code
27	University_Name_En	University Name in Latin
28	University_Name_Ar	University Name in Arabic
29	College_Id	College Code
30	College_Name_En	College Name in Latin
31	College_Name_Ar	College Name in Arabic
32	Other_University_Name	Other University Name
33	University_Branch_Id	University Branch Code
34	University_Branch_Name_Ar	University Branch Name in Latin
35	University_Branch_Name_En	University Branch Name in Arabic



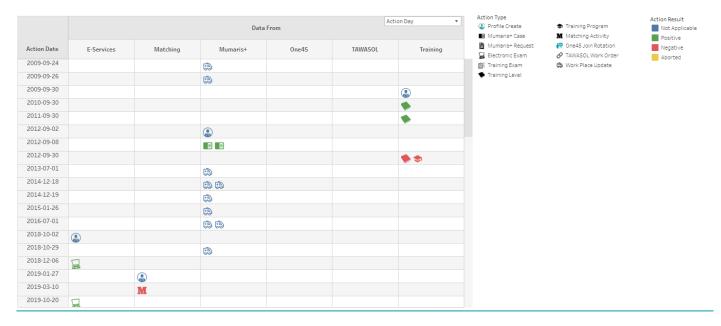
36	Graduation_Year	Graduation Year
37	Loading_Date	Data of Last Refresh
38	Profile_Column_Name	Data source table and column name
39	Profile_Status	Practitioner current registration status
40	Profile_Create_Date	Profile Creation Date

#### 3.6 Profile Timeline Structure:

Keep all beneficiary transaction data collect from different sources; this would describe the journey of beneficiary how he travel so far over the period in SCFHS.

#### **Profile Timeline chat:**

This dashboard describe the journey of beneficiary

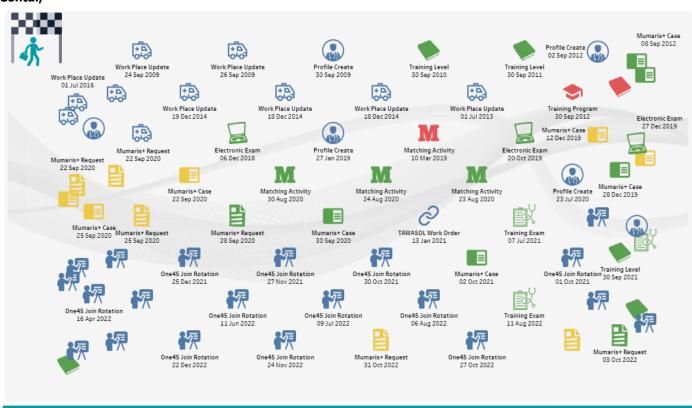


Contd.,





#### Contd.,





#### 4- RMD Conceptual Architecture

A conceptual reference model defines the terms and concepts used by the enterprise and the communities and business stakeholders in which the enterprise operates. Other strategic, operational, and architectural assets reference it as a way to federate and pivot between different processes, communities, schemas, and systems without coupling them together.

The conceptual reference model approach takes enterprise vocabularies and enterprise data models to a new level that enables federation and integration capabilities to be partially automated and validated

SCFHS follows centralized reference data model for an entire organization level data gathered from internal and external.

#### 4.1 Components of Reference Data Model:

Components of RDM are Data source, Hub and Consume Applications.

**Data Source**:- SCFHS has more than 100 data sources from various applications which contains Reference and Master data. Some of the Data sources are listed as follows:

- Mumaris Plus
- Training
- Matching for Residency
- Matching for Fellowship
- HA Matching
- One45
- Tawasol
- HR
- Health Academy
- Portal
- Majales
- Supporting Service

**Data Hub**:- Data hub keeps all the data sources available at SCFHS organization in HUB layer and even from external data received from MOE, MCS and HRSD.

The EDW has all the reference and master data entity which is consolidated from different sources and cleansed and reliable source for dashboard and other applications.

Some of the Reference entity are:

- Country
- City
- Speciality



- University
- Exam
- Training Center
- Medical Fields
- Organization Units
- Region

#### 4.2 Reference and Master Data Conceptual Model:

Conceptual model shows how the different data source are flow from HUB to EDW to PL and Mart.

Finally the dashboard, Exchange and data sharing are get benefitted from RDM.

