



**Omni-Patient™ Management Central
Administration Console User's Guide**
Version 2.3.3.2

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Preface

This documentation describes how to perform administration tasks for Omni-Patient™ Management Central (OPMC). Omni-Patient™ Management Central provides a web-based administration console that you can use to configure the application.

How This Manual Is Organized

This manual includes the following chapters:

	Chapter/Appendix	Contents
1	Introducing the Omni-Patient™ Management Central Administration Console	Introduces the Omni-Patient™ Management Central (OPMC) administration console.
2	Configuring Application Components	Describes how to configure Omni-Patient™ Management Central (OPMC) application components using the administration console.

Documentation Conventions

The following table lists and describes the documentation conventions that are used in this manual.

Convention	Description
<code>THIS TYPEFACE</code> or <code>this typeface</code>	Denotes syntax that you must type exactly as shown.
<i>this typeface</i>	Represents a placeholder (or variable), a cross-reference, or an important term. It may also indicate a button, menu item, or dialog box option that you can click or select.

Convention	Description
<u>underscore</u>	Indicates a default setting.
Key + Key	Indicates keys that you must press simultaneously.
{ }	Indicates two or three choices. Type one of them, not the braces.
	Separates mutually exclusive choices in syntax. Type one of them, not the symbol.
...	Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis (...).
. . .	Indicates that there are (or could be) intervening or additional commands.

Related Publications

Visit our Technical Documentation Library at <http://documentation.informationbuilders.com>. You can also contact the Publications Order Department at (800) 969-4636.

Customer Support

Do you have questions about this product?

Join the Focal Point community. Focal Point is our online developer center and more than a message board. It is an interactive network of more than 3,000 developers from almost every profession and industry, collaborating on solutions and sharing every tips and techniques. Access Focal Point at <http://forums.informationbuilders.com/eve/forums>.

You can also access support services electronically, 24 hours a day, with InfoResponse Online. InfoResponse Online is accessible through our website, <http://www.informationbuilders.com>. It connects you to the tracking system and known-problem database at the Information Builders support center. Registered users can open, update, and view the status of cases in the tracking system and read descriptions of reported software issues. New users can register immediately for this service. The technical support section of www.informationbuilders.com also provides usage techniques, diagnostic tips, and answers to frequently asked questions.

Call Information Builders Customer Support Services (CSS) at (800) 736-6130 or (212) 736-6130. Customer Support Consultants are available Monday through Friday between 8:00 A.M. and 8:00 P.M. EST to address all your questions. Information Builders consultants can also give you general guidance regarding product capabilities. Be prepared to provide your six-digit site code (xxxx.xx) when you call.

To learn about the full range of available support services, ask your Information Builders representative about InfoResponse Online, or call (800) 969-INFO.

Help Us to Serve You Better

To help our consultants answer your questions effectively, be prepared to provide specifications and sample files and to answer questions about errors and problems.

The following table lists the environment information that our consultants require.

Platform	
Operating System	
OS Version	
JVM Vendor	
JVM Version	

The following table lists the deployment information that our consultants require.

Adapter Deployment	
Container	
Version	
Enterprise Information System (EIS) - if any	
EIS Release Level	
EIS Service Pack	
EIS Platform	

The following table lists iWay-related information needed by our consultants.

iWay Adapter	
iWay Release Level	
iWay Patch	

The following table lists additional questions to help us serve you better.

Request/Question	Error/Problem Details or Information
Did the problem arise through a service or event?	
Provide usage scenarios or summarize the application that produces the problem.	
When did the problem start?	
Can you reproduce this problem consistently?	
Describe the problem.	
Describe the steps to reproduce the problem.	
Specify the error messages.	
Any change in the application environment: software configuration, EIS/database configuration, application, and so forth?	
Under what circumstance does the problem <i>not</i> occur?	

The following is a list of error and problem files that might be applicable.

- ☐ Input documents (XML instance, XML schema, non-XML documents)
- ☐ Transformation files

- ❑ Error screen shots
- ❑ Error output files
- ❑ Trace files
- ❑ Service Manager package to reproduce problem
- ❑ Custom functions and agents in use
- ❑ Diagnostic Zip
- ❑ Transaction log

For information on tracing, see the *iWay Service Manager User's Guide*.

User Feedback

In an effort to produce effective documentation, the Technical Content Management staff welcomes your opinions regarding this document. Please use the Reader Comments form at the end of this document to communicate your feedback to us or to suggest changes that will support improvements to our documentation. You can also contact us through our website, <http://documentation.informationbuilders.com/connections.asp>.

Thank you, in advance, for your comments.

iWay Software Training and Professional Services

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Interested in technical assistance for your implementation? Our Professional Services department provides expert design, systems architecture, implementation, and project management services for all your business integration projects. For information, visit our website, <http://www.informationbuilders.com/consulting>.

1 | Introducing the Omni-Patient™ Management Central Administration Console

This chapter introduces the Omni-Patient™ Management Central (OPMC) administration console.

Topics:

- ❑ Overview
- ❑ Key Features
- ❑ Accessing the Administration Console
- ❑ Understanding the Layout and Structure of the Administration Console

Overview

Omni-Patient™ Management Central (OPMC) provides an administration console that you can use to configure OPMC.

The administration console is only available after users log in to OPMC. Only users who are first authenticated and authorized with the *System Administrator* role in the WSO2 Identity Server user store repository are allowed to access the OPMC administration console.

Key Features

The Omni-Patient™ Management Central administration console provides a web-based interface to view and edit OPMC configuration details (metadata).

The main operations that can be performed in the Administration console include the following:

- ❑ View and edit sources.
- ❑ View and edit views, create new views.
- ❑ View and edit options, create new options for table, view or source.
- ❑ View and edit tables, create new tables.
- ❑ View and edit columns.
- ❑ View and edit links.
- ❑ View and edit Table Order.
- ❑ View and edit settings, create new settings.
- ❑ Download and upload configuration (metadata.xml) files.

Note: All configuration options set, and all screen layouts defined by the metadata that the administration console creates or edits are applied at a system-wide level. These options cannot be configured on a per-user basis.

For example, if the administration console is used to create a grid display with *LastName* as column 1 and *FirstName* as column2, then all users viewing that display will see the columns in this order.

Accessing the Administration Console

Ensure that the user who is responsible for managing Omni-Patient™ Management Central (OPMC) metadata, modifying application options, and display definitions has the *System Administrator* role in the WSO2 Identity Server user store repository.

1. Enter the URL in your browser to access Omni-Patient™ Management Central (OPMC).
For example:

<https://opmcHostName:8443>

2. Sign in to OPMC with your valid user ID and password.
3. Click the *Administration* tab on the OPMC menu bar.

Understanding the Layout and Structure of the Administration Console

In this section:

Components Menu

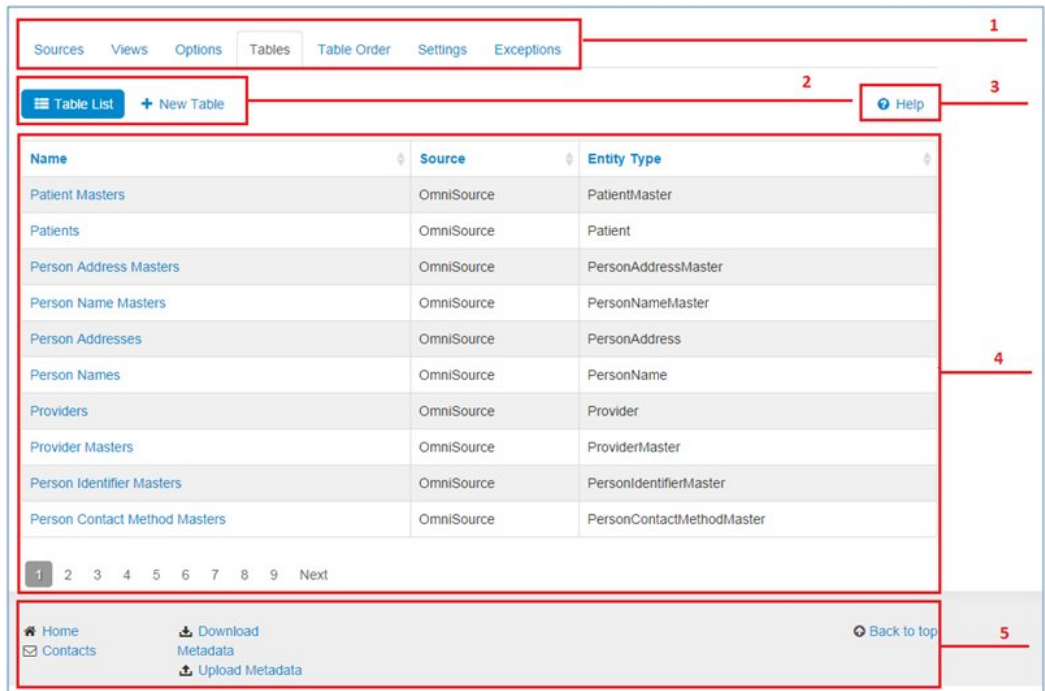
Actions Menu

Help Menu

Content Area

Footer

All pages within the Omni-Patient™ Management Central administration console are unified through a common page layout, as shown in the following image.



Each page contains the following areas:

1. Components menu
2. Actions menu
3. Help menu

4. Content area

5. Footer

Components Menu

The components menu includes the following tabs:

- ❑ Sources
- ❑ Views
- ❑ Options
- ❑ Tables
- ❑ Table Order
- ❑ Settings
- ❑ Exceptions

The following image shows the components menu with the Tables tab selected.



Actions Menu

The actions menu may vary depending on the specific page. Usually, the actions menu contains:

- ❑ List of items.
- ❑ Create item button.
- ❑ Edit item button.
- ❑ Delete item button.

Detailed information about the actions menu is described throughout this documentation.

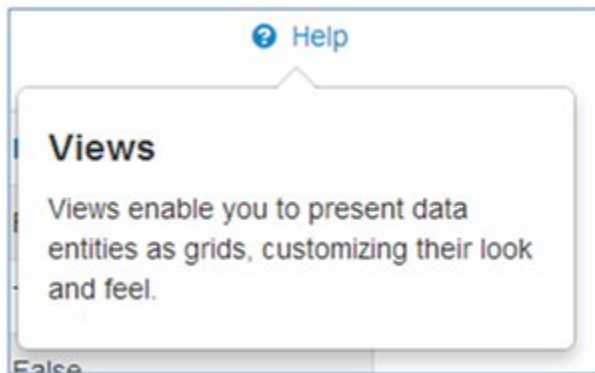
The following image shows the actions menu when the Tables tab selected in the components menu.



Help Menu

The Help menu describes the functionality of the corresponding activity. It is available within each tab for each action.

The following image shows the Help menu when the Views tab selected in the components menu.



Content Area

The content area is the main part of each page where administrators can view and edit metadata.

Detailed descriptions of different pages are provided throughout this documentation.

Footer

The footer contains links to the Home and Contacts pages, and links for downloading and uploading metadata. It also contains the *Back to top* link.



2 | Configuring Application Components

This section describes how to configure Omni-Patient™ Management Central (OPMC) application components using the administration console.

Topics:

- ❑ Sources
- ❑ Views
- ❑ Options
- ❑ Tables
- ❑ Table Order
- ❑ Settings
- ❑ Exceptions
- ❑ Downloading and Uploading Metadata
- ❑ Configuring 360 Viewer
- ❑ Configuring Remediation Pages

Sources

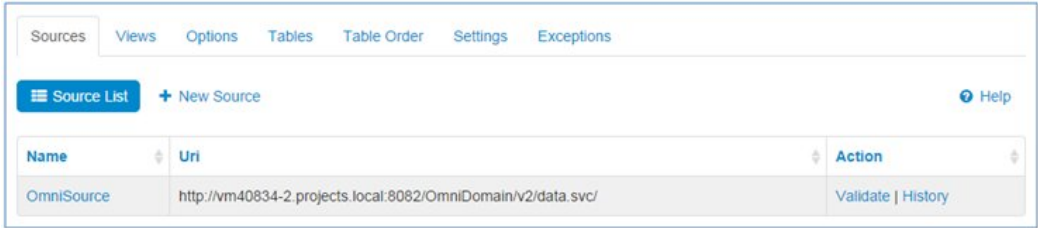
In this section:

- Source List
- Source Validation
- Source History
- Show Source
- Editing a Source
- Deleting a Source

Sources contain information about services that provide data and its metadata (data structure).

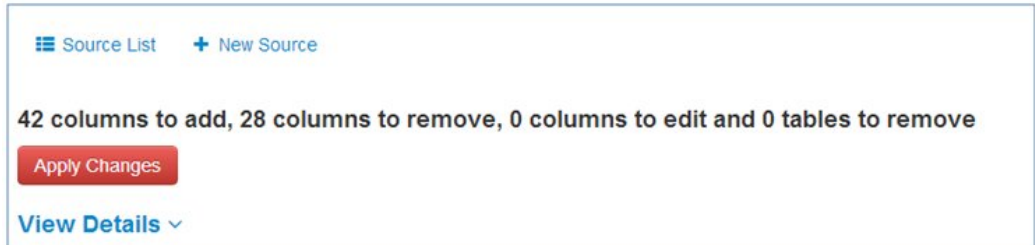
Source List

A list of all sources is displayed on the Source List page. On this page, it is also possible to validate source and view source updating history.

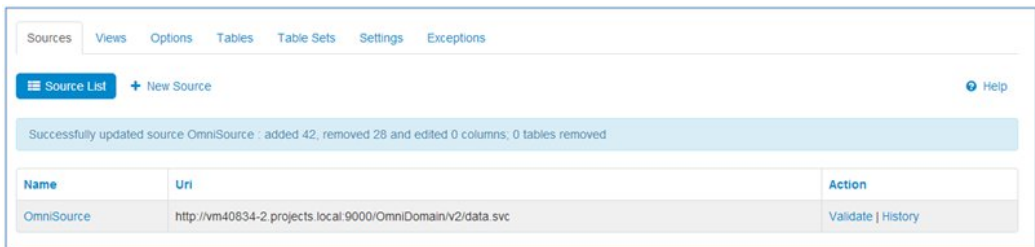


Source Validation

Administrators can validate a source by clicking on the *Validate* link. Validation is necessary to check the source remote changes. It covers the cases when an additional column was added to a specific table on a remote source, removed from it, or its properties changed (*type*, *canFilter*, *canEdit*). After validation, all changes will be synchronized.

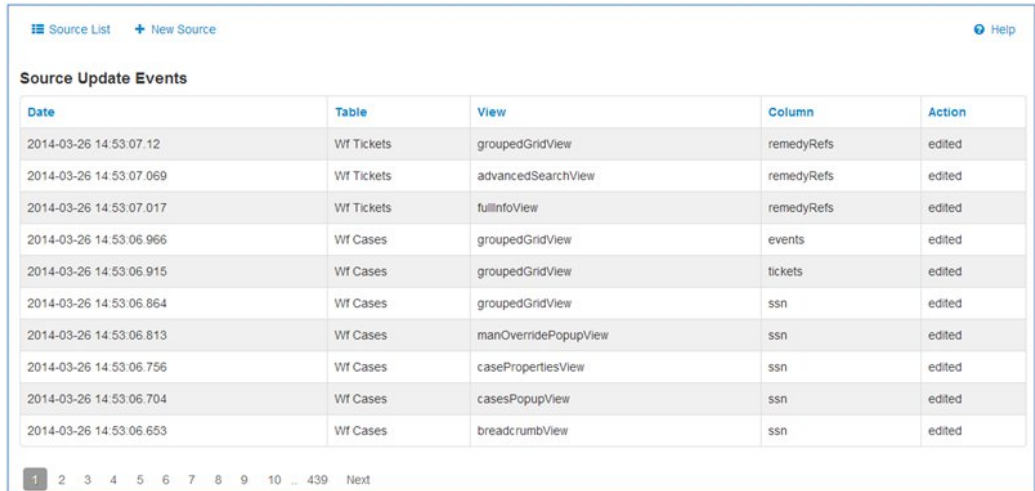


After clicking the *Apply Changes* button, the source will be updated, as shown in the following image.



Source History

Administrators can access the Source Update History page from the Source List page by clicking the *History* link. This page contains all update events after a source validation, as shown in the following image.



The screenshot shows the 'Source Update Events' page. At the top, there are links for 'Source List' and '+ New Source', and a 'Help' icon. The table below lists update events with columns for Date, Table, View, Column, and Action. The events are sorted by date in descending order. At the bottom, there is a pagination bar showing page 1 of 439, with links for previous and next pages.

Date	Table	View	Column	Action
2014-03-26 14:53:07.12	Wf Tickets	groupedGridView	remedyRefs	edited
2014-03-26 14:53:07.069	Wf Tickets	advancedSearchView	remedyRefs	edited
2014-03-26 14:53:07.017	Wf Tickets	fullInfoView	remedyRefs	edited
2014-03-26 14:53:06.966	Wf Cases	groupedGridView	events	edited
2014-03-26 14:53:06.915	Wf Cases	groupedGridView	tickets	edited
2014-03-26 14:53:06.864	Wf Cases	groupedGridView	ssn	edited
2014-03-26 14:53:06.813	Wf Cases	manOverridePopupView	ssn	edited
2014-03-26 14:53:06.756	Wf Cases	casePropertiesView	ssn	edited
2014-03-26 14:53:06.704	Wf Cases	casesPopupView	ssn	edited
2014-03-26 14:53:06.653	Wf Cases	breadcrumbView	ssn	edited

Show Source

To view detailed information about a source, administrators should click the name of the source on the Source List page. The Show Source page contains the following information:

- ☐ Source name
- ☐ Uri
- ☐ Tables the source contains

□ Source configuration

The screenshot displays the 'Source configuration' window in the Omni-Patient Management Central Administration Console. The window has a tabbed interface with 'Sources' selected. Below the tabs are buttons for 'Sources List', 'Edit Source', 'Delete', and a 'Help' icon. The main area contains a table with four rows, each marked with a red square and a number:

1	Name	OmniSource
2	Uri	http://vm40834-1.projects.local:8082/OmniDomain/v2/data.svc/
3	Tables	<ul style="list-style-type: none">Patient MastersOrganizational Unit IdentifiersOrganization NamesOrganizational Unit Contact Method MastersProvider AssignmentsProvider License MonitorsFacility Relation MastersFacility Location Contact Method MastersJob MastersProvider Interpreter PrivilegesFacility Location Relation MastersProvider Practice Speciality MastersFacility Address MastersOrganization Address MastersOrganizationsPerson NamesFacility Identifier MastersPatient Medical Record Number MastersProvider InsurancesOrganization Identifiers
4	Source configuration	orDelimiter

Editing a Source

The Edit Source page enables administrators to change source properties. However, some fields such as Uri and Tables cannot be edited. To navigate to this page, administrators should select the source that needs to be changed from the list and then click the *Edit Source* button.

Sources Views Options Tables Table Order Settings Exceptions

Source List + New Source Edit Source Delete Help

Name OmniSource

Uri http://vm40834-2.projects.local:9

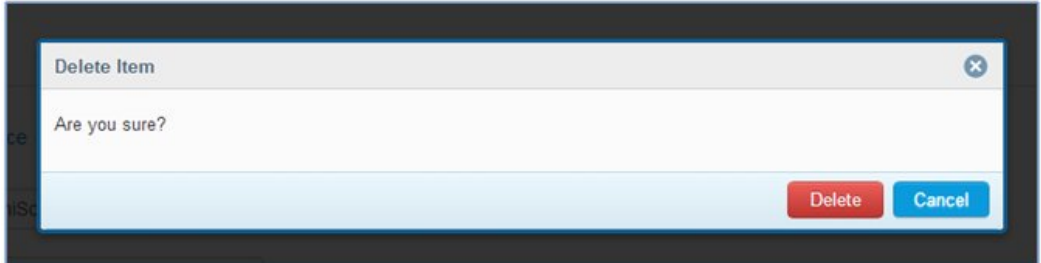
Service URL http://vm40834-2.projects.local:9 Workflow endpoint

Tables

- Person Name Masters
- Organization Names
- Facility Address Masters
- Facility Masters
- Provider Practice License Masters
- Patient Masters
- Organization Contact Methods
- Organization Contact Method Masters
- Facility Location Address
- Organization Name Masters
- Facility Location Identifiers
- Wf Events
- Include Rules
- Provider License Monitors

Deleting a Source

Administrators can delete an item by clicking the *Delete* button, which is available on the Show Source page, as shown in the following image.



Views

In this section:

View List

Show View

Creating a New View

Editing a View

Views are used to select/group columns for display in the main interface of Omni-Patient™ Management Central (OPMC).

Grid Result View X Quick Details View X Full Info View X Record Properties View X Advanced Search View X Frequent Search View X

Related Instances View X Breadcrumb View X + Add view ▾

Included:

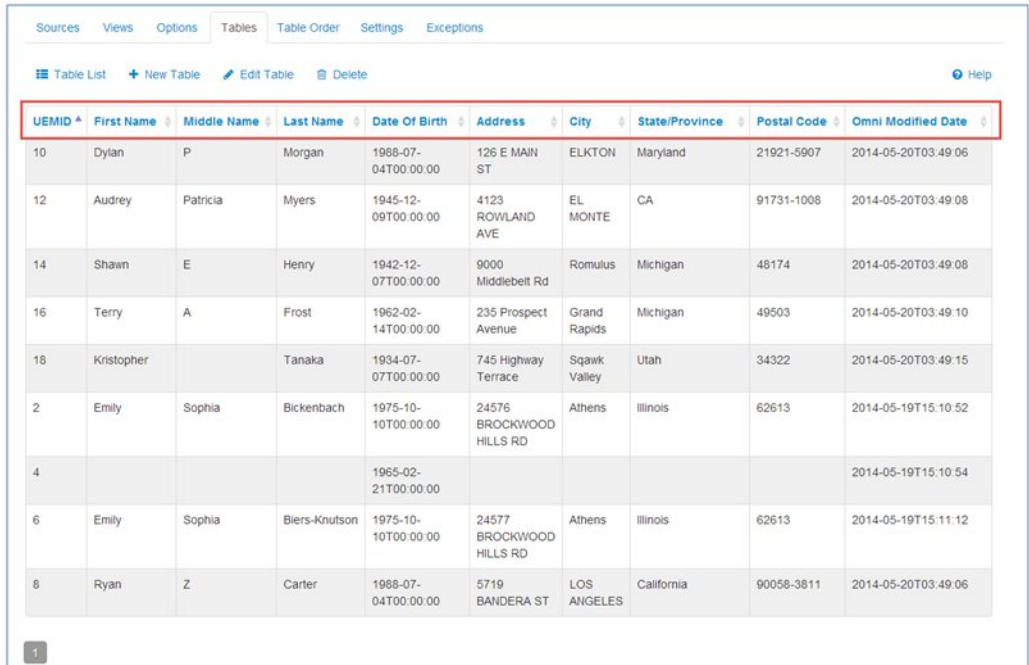
- masterId X
- firstName X
- middleName X
- lastName X
- dateOfBirth X
- addressLine1 X
- city X
- stateProvinceCodeDescription X
- postalCode X
- omniModifiedDate X

<< >>

Excluded:

- addressLine2
- addressLine3
- addressLine4
- addressUsageComment
- adoptedCode
- adoptedCodeDescription
- adoptedCodeId
- ambulatoryStatusCode
- ambulatoryStatusCodeDescription
- ambulatoryStatusCodeId
- badDebtCode

For example, the Grid Result View is used to represent the grid on the Show Table page, as shown in the following image.



UEMID	First Name	Middle Name	Last Name	Date Of Birth	Address	City	State/Province	Postal Code	Omni Modified Date
10	Dylan	P	Morgan	1968-07-04T00:00:00	126 E MAIN ST	ELKTON	Maryland	21921-5907	2014-05-20T03:49:06
12	Audrey	Patricia	Myers	1945-12-09T00:00:00	4123 ROWLAND AVE	EL MONTE	CA	91731-1008	2014-05-20T03:49:08
14	Shawn	E	Henry	1942-12-07T00:00:00	9000 Middlebelt Rd	Romulus	Michigan	48174	2014-05-20T03:49:08
16	Terry	A	Frost	1962-02-14T00:00:00	235 Prospect Avenue	Grand Rapids	Michigan	49503	2014-05-20T03:49:10
18	Kristopher		Tanaka	1934-07-07T00:00:00	745 Highway Terrace	Sqawk Valley	Utah	34322	2014-05-20T03:49:15
2	Emily	Sophia	Bickenbach	1975-10-10T00:00:00	24576 BROCKWOOD HILLS RD	Athens	Illinois	62613	2014-05-19T15:10:52
4				1965-02-21T00:00:00					2014-05-19T15:10:54
6	Emily	Sophia	Biers-Knutson	1975-10-10T00:00:00	24577 BROCKWOOD HILLS RD	Athens	Illinois	62613	2014-05-19T15:11:12
8	Ryan	Z	Carter	1968-07-04T00:00:00	5719 BANDERA ST	LOS ANGELES	California	90058-3811	2014-05-20T03:49:06

View List

The list of all views is displayed on the View List page, as shown in the following image.

Title	Name	Has Columns	Exclude All	Has Column Groups	Has Column Sub Groups	Has Column Sections
Grid Result View	gridResultView	True	True	False	False	False
Quick Details View	quickDetailsView	True	True	True	True	True
Full Info View	fullInfoView	True	False	True	False	False
Record Properties View	recordPropertiesView	True	True	False	False	False
Advanced Search View	advancedSearchView	True	True	True	True	False
Frequent Search View	frequentSearchView	True	True	False	True	False
Related Instances View	relatedinstancesView	True	True	False	False	False
Breadcrumb View	breadcrumbView	True	True	False	False	False
Cases Popup View	casesPopupView	True	True	False	False	False
Case Properties View	casePropertiesView	True	True	True	False	False

List of all views and its representation in the user interface is described in the following table.

View	Description
Grid Result View	UI: Columns that should be displayed in the tables on the 360 Viewer and 360 Details page. Also reflects Show Table page on Admin console. Admin Tables: Domain's (Party Master, Party) and Subdomain's tables (Addresses).
Quick Details View	UI: Columns that should be displayed in Preview Panel in the 360 Viewer and 360 Details tables. Admin Tables: Domain page table and Details 360 subdomain table (Preview Panel), also configure case and ticket pop-ups (Wf Cases, Wf Tickets, WF RemedyRef tables).

View	Description
Full info View	<p>UI: Columns on Details 360, Master Comparison, Compare Source, Historic Master Comparison, Historic Compare Source, Remediation pages.</p> <p>Admin Tables: Domain's (Party Master, Party) and Subdomain's tables (Addresses).</p>
Record Properties View	<p>UI: Record properties on Master Comparison for current and historic records.</p> <p>Admin Tables: Domain's (Party Master, Party) tables.</p>
Advanced search view	<p>UI: Domain search, Instance search, and Issues Search.</p> <p>Admin Tables: Domain's (Party Master, Party) and Subdomain's tables (Addresses).</p>
Frequent Search View	<p>UI: Domain search, Instance search.</p> <p>Admin Tables: Domain's (Party Master, Party) tables.</p>
Related Instances View	<p>UI: Details 360 breadcrumb drop-down list for domain.</p> <p>Admin Tables: Domain's (Party Master, Party) and Subdomain's tables (Addresses).</p>
Breadcrumb View	<p>UI: Breadcrumbs throughout the entire application.</p> <p>Admin Tables: Domain's(Party Master, Party) and Subdomain's tables (Addresses).</p>
Case Properties View	<p>UI: Case properties area on remediation pages: Matching, Cleansing, General Issue.</p> <p>Admin Tables: WF Cases</p>
Grouped Grid View	<p>UI: Data Dictionary Code set grouped view.</p> <p>Admin Tables: Source Codes.</p>
Case Issues Grid View	<p>UI: Columns in Case's Grid on Issues Search page.</p> <p>Admin Tables: WF Cases, all Domain's (Party Master, Party) tables.</p>

View	Description
Ticket Issues Grid View	UI: Columns in Ticket's Grid on Issues Search page (nested grids). Admin Tables: WF Tickets.
Manual Override Popup View	UI: Issue popups. Admin Tables: WF Remedy Refs table.
My Cases Filter View	UI: Filter by Cases and Filter by Tickets panel on My cases tab (Issue Search page) Admin Tables: WF Tickets, WF Cases
All Cases Filter View	UI: Filter by Cases and Filter by Tickets panel on All cases tab (Issue Search page). Admin Tables: WF Tickets and WF Cases.

Show View

The Show View page can be reached by selecting any view from the list. It contains the following information about the selected view:

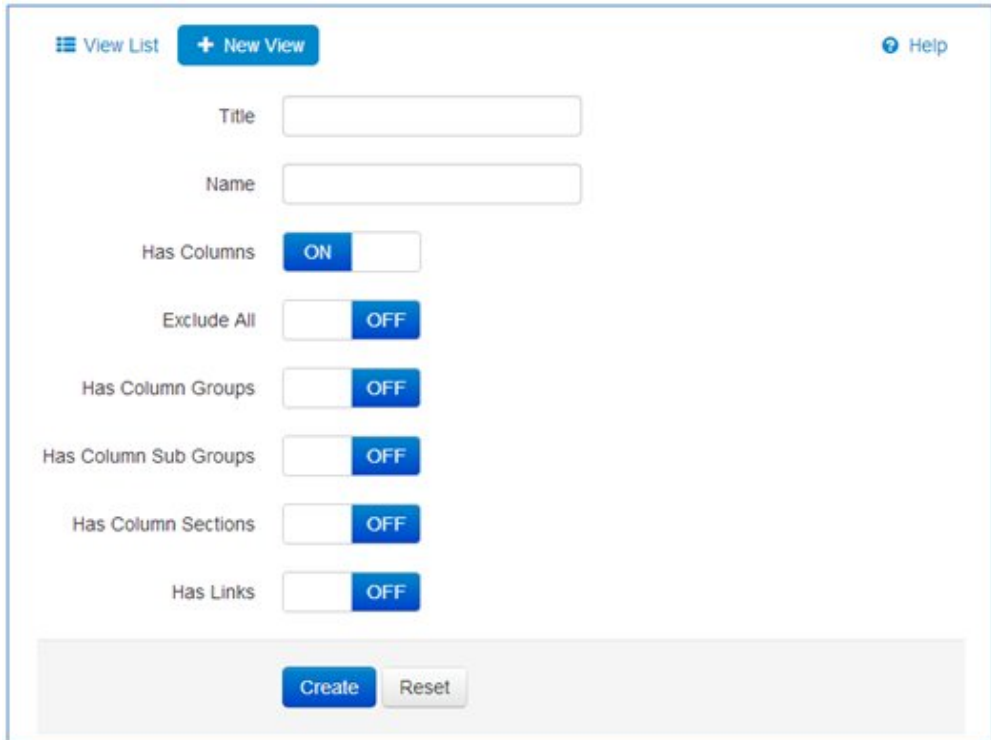
- ☐ View title
- ☐ View name
- ☐ If a view has columns
- ☐ If all columns must be excluded
- ☐ If a view has groups
- ☐ If a view has sub-groups
- ☐ If a view has sections
- ☐ If a view has links

More information about groups/sub-groups/sections will be provided in the following sections.

	View List	+ New View	Edit View	Delete	Help
1	Title	Grid Result View			
2	Name	gridResultView			
3	Has Columns	True			
4	Exclude All	True			
5	Has Column Groups	False			
6	Has Column Sub Groups	False			
7	Has Column Sections	False			
8	Has Links	False			

Creating a New View

Administrators can create a new view by clicking the *New View* button. The new view will not be used anywhere, but this functionality is available.



The screenshot shows a web-based form for creating a new view. At the top left, there is a 'View List' link with a grid icon and a '+ New View' button. At the top right, there is a 'Help' link with a question mark icon. The form contains the following fields and controls:

- Title:** A text input field.
- Name:** A text input field.
- Has Columns:** A toggle switch currently set to 'ON'.
- Exclude All:** A toggle switch currently set to 'OFF'.
- Has Column Groups:** A toggle switch currently set to 'OFF'.
- Has Column Sub Groups:** A toggle switch currently set to 'OFF'.
- Has Column Sections:** A toggle switch currently set to 'OFF'.
- Has Links:** A toggle switch currently set to 'OFF'.

At the bottom of the form, there are two buttons: 'Create' (in blue) and 'Reset' (in grey).

Editing a View

The Edit View page enables administrators to change a view. Administrators can navigate to this page from the Show View page by clicking the *Edit View* button. Note that the Name field cannot be edited.

The screenshot displays the 'Edit View' interface. At the top, there is a navigation bar with tabs: Sources, Views (selected), Options, Tables, Table Order, Settings, and Exceptions. Below the navigation bar, there is a toolbar with buttons: View List, + New View, Edit View (highlighted), and Delete. A Help icon is also present. The main form area contains the following fields and controls:

- Title:** A text input field containing 'Grid Result View'.
- Name:** A text input field containing 'gridResultView'.
- Has Columns:** A toggle switch currently set to 'ON'.
- Exclude All:** A toggle switch currently set to 'ON'.
- Has Column Groups:** A toggle switch currently set to 'OFF'.
- Has Column Sub Groups:** A toggle switch currently set to 'OFF'.
- Has Column Sections:** A toggle switch currently set to 'OFF'.
- Has Links:** A toggle switch currently set to 'OFF'.

At the bottom of the form, there is a grey bar containing three buttons: 'Update' (blue), 'Delete' (red), and 'Reset' (grey).

Options

In this section:

Option List
Show Option
Creating a New Option
Editing an Option

Options can be added for a table, source, or view. Each of these elements can store a custom value for the option. Currently, options are used to:

- ☐ Configure a name for single table record.
- ☐ Show or hide Info tabs.
- ☐ Switch logging on or off.
- ☐ Define a title for Default Filters.
- ☐ Adding of multiselect switchers to My/All Filter cases.

Option List

The list of all options is displayed on the Option List page, as shown in the following image.

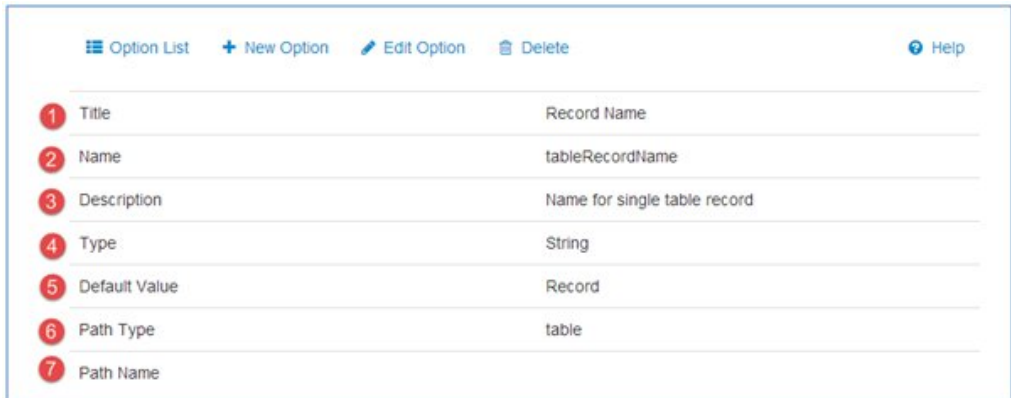
Sources	Views	Options	Tables	Table Order	Settings	Exceptions
Options List		+ New Option		Help		
Title	Name	Description	Type	Default Value	Path Type	Path Name
Record Name	tableRecordName	Name for single table record	String	Record	table	
Info Tab Indicator	isInfoTab	Indicates whether a table is an information kind of tab	Boolean	false	table	
Is Logged	IsLogged	Log events from this table	Boolean	true	table	
DefaultFilterStateMyCases	DefaultFilterStateMyCases	DefaultFilterStateMyCases	String		view	myCasesFilterView
DefaultFilterStateAllCases	DefaultFilterStateAllCases	DefaultFilterStateAllCases	String		view	allCasesFilterView
SwitcherValuesStateAllCases	SwitcherValuesStateAllCases	adds possibility using of multiselect switchers for configuring of filtering items on All Cases	String		view	allCasesFilterView
SwitcherValuesStateMyCases	SwitcherValuesStateMyCases	adds possibility using of multiselect switchers for configuring of filtering items on My cases	String		view	myCasesFilterView

Show Option

When administrators select any option from the list, the Show Option page is displayed. This page contains the following information about the selected option:

- ☐ Option title
- ☐ Option name
- ☐ Option description
- ☐ Option type
- ☐ Option default type
- ☐ Type of component

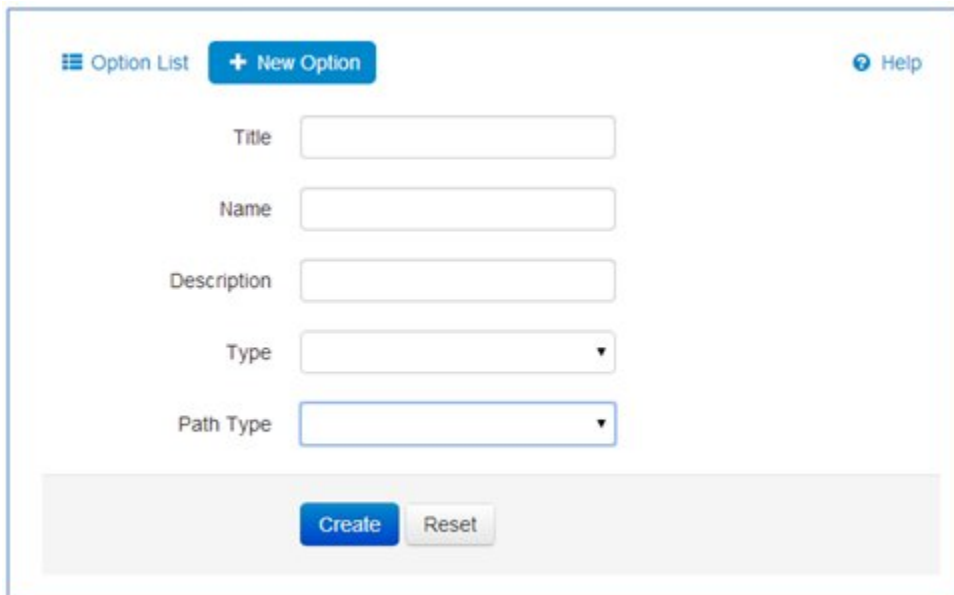
- ❑ Name of view (if required)



	Option List	+ New Option	Edit Option	Delete	Help
1	Title	Record Name			
2	Name	tableRecordName			
3	Description	Name for single table record			
4	Type	String			
5	Default Value	Record			
6	Path Type	table			
7	Path Name				

Creating a New Option

Administrators can create a new option on the New Option page by clicking the corresponding button on the Option List page, as shown in the following image.



[Option List](#) [+ New Option](#) [Help](#)

Title

Name

Description

Type

Path Type

[Create](#) [Reset](#)

Editing an Option

The Edit Option page enables administrators to modify an option. Administrators can navigate to that page from the Show Option page by clicking the *Edit Option* button, as shown in the following image.

The screenshot displays the 'Edit Option' page. At the top, there is a navigation bar with links: 'Option List', '+ New Option', 'Edit Option' (highlighted with a pencil icon), 'Delete' (with a trash icon), and 'Help' (with a question mark icon). The main form contains the following fields:

- Title:** A text input field containing 'Record Name'.
- Name:** A text input field containing 'tableRecordName'.
- Description:** A text input field containing 'Name for single table record'.
- Type:** A text input field containing 'String'.
- Default Value:** A text input field containing 'Record'.
- Path Type:** A text input field containing 'table'.
- Path Name:** A text input field that is currently empty.

At the bottom of the form, there is a light gray bar containing three buttons: 'Update' (blue), 'Delete' (red), and 'Reset' (gray).

Note that the Name and Type fields cannot be modified.

Tables

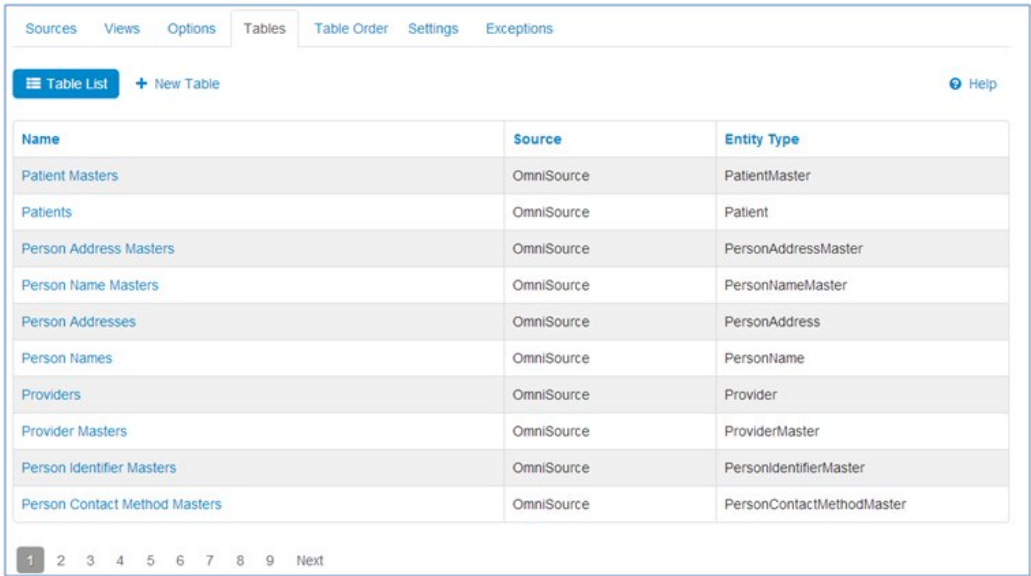
In this section:

- Table List
- Show Table
- Creating a New Table
- Editing a Table
- Editing a Column
- Global Column Editing
- Editing a Link

Tables represent all available entities (for example, Patient Master, its Addresses, Provider Master, and so on).

Table List

The list of all tables is displayed on the Table List page, as shown in the following image.



The screenshot shows the 'Table List' page in a software application. At the top, there are tabs: Sources, Views, Options, Tables (selected), Table Order, Settings, and Exceptions. Below the tabs, there is a 'Table List' button and a '+ New Table' link. A 'Help' icon is also present. The main content is a table with three columns: Name, Source, and Entity Type. The table lists ten tables, all with 'OmniSource' as the source. The bottom of the page shows a pagination bar with numbers 1 through 9 and a 'Next' link.

Name	Source	Entity Type
Patient Masters	OmniSource	PatientMaster
Patients	OmniSource	Patient
Person Address Masters	OmniSource	PersonAddressMaster
Person Name Masters	OmniSource	PersonNameMaster
Person Addresses	OmniSource	PersonAddress
Person Names	OmniSource	PersonName
Providers	OmniSource	Provider
Provider Masters	OmniSource	ProviderMaster
Person Identifier Masters	OmniSource	PersonIdentifierMaster
Person Contact Method Masters	OmniSource	PersonContactMethodMaster

Show Table

When administrators select a table from the list, the Show Table page is displayed. This page contains information about the selected table, as shown in the following image.

UEMID	First Name	Middle Name	Last Name	Date Of Birth	Address	City	State/Province	Postal Code
10	Ava	F	Miller					
12	Emily	G	Davis					
14	Abigail	H	Garcia					
16	Jayden	J	Wilson					
18	William	I	Rodriguez					
2	Olivia	D	Brown					
20	Madison	L	Anderson					
22	Noah	K	Martinez					
24	Michael	M	Taylor					
26	Alexander	O	Hernandez					

1 2 3 Next

Creating a New Table

Administrators can create a new table on the New Table page by clicking the corresponding button on the Show Table page.

The New Table page contains the following sections:

1. Table properties
2. Table options
3. View tabs
4. Included columns
5. Include all/Exclude all buttons
6. Excluded columns

Columns can be added in the Included section by dragging and dropping, or deleted by clicking the "x" icon.

The screenshot shows the 'New Table' configuration window with the following elements and numbered callouts:

- 1**: Points to the 'Source' dropdown menu (set to 'OmniSource').
- 2**: Points to the 'Table' dropdown menu (set to 'Column').
- 3**: Points to the 'Name' text input field (containing 'Columns').
- 4**: Points to the 'Record Name' text input field (containing 'Record').
- 5**: Points to the 'Info Tab Indicator' toggle switch (set to 'OFF').
- 6**: Points to the 'Included' list, which currently contains 'calcDescription'.

Other visible elements include a 'Table List' tab, a '+ New Table' button, a 'Help' icon, and a list of view options (Grid Result View, Quick Details View, Full Info View, Record Properties View, Advanced Search View, Frequent Search View, Related Instances View, Breadcrumb View, Cases Popup View, Case Properties View, Manual Override Popup View, Grouped Grid View) with an '+ Add view' button. At the bottom are 'Create' and 'Cancel' buttons.

Some views have groups/sub-groups/sections. To create a new group/sub-group/section, administrators should choose the appropriate value from the drop-down list (if the view allows having groups/sub-groups/sections), type the name, and then press *Enter*.

Groups allow administrators to unite columns.

Sub-group is used to display a key-value pair, which is why a sub-group must contain two columns.

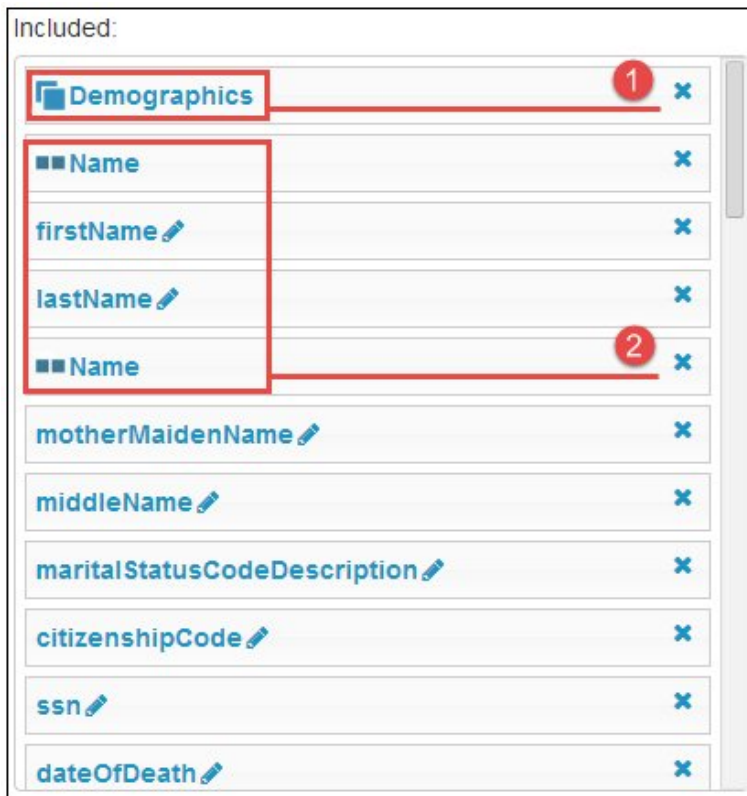
A section is an additional grouping in the group.



Group ▼

Add Group

For example, the Patient Master table has groups (1) and subgroups (2) in the Quick Details View.



Included:

■ Demographics	1	x
■ ■ Name		x
firstName		x
lastName		x
■ ■ Name	2	x
motherMaidenName		x
middleName		x
maritalStatusCodeDescription		x
citizenshipCode		x
ssn		x
dateOfDeath		x

The following image shows the Advanced Search dialog.

Created items are validated before they are updated to the table. Sub-group tags must contain two columns. In addition, the Grid Result View must have at least one column included. If validation fails, an appropriate message is displayed and the table is not updated.

View tabs can be closed and restored from +Add view drop-down list, as shown in the following image.

Editing a Table

The Edit Table page looks similar to the New Table page. To navigate to the Edit Table page, administrators must select a table from the list and click the *Edit Table* button. Note that the Source and Table fields cannot be edited. Administrators can enable the Info Tab Indicator to represent Info tabs for a particular table.

The screenshot displays the 'Edit Table' configuration page. At the top, there are tabs for Sources, Views, Options, Tables (selected), Table Order, Settings, and Exceptions. Below the tabs, there are buttons for Table List, + New Table, Edit Table (highlighted), and Delete. A Help icon is also present.

Configuration fields include:

- Source: OmniSource
- Table: PatientMaster
- Name: Patient Masters
- Record Name: Patient (with a note: Name for single table record)
- Info Tab Indicator: OFF (with a note: Indicates whether a table is an information kind of tab)

Below the configuration fields, there are several view tabs, each with a close icon (X):

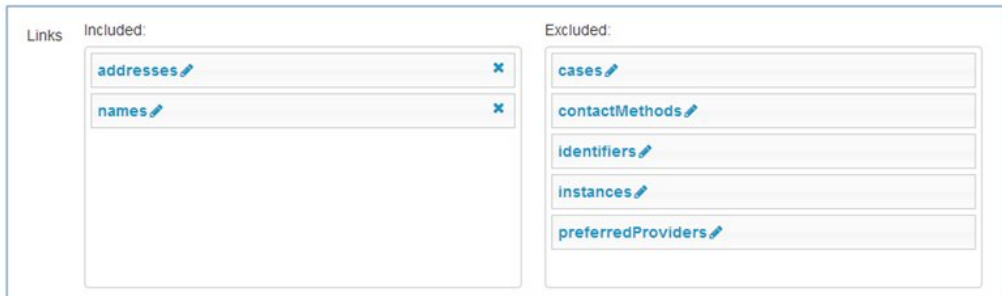
- Breadcrumb View
- Related Instances View
- Frequent Search View
- Advanced Search View
- Record Properties View
- Full Info View
- Quick Details View
- Grid Result View
- + Add view

At the bottom, there are two lists for field management:

- Included:**
 - masterId
 - fullName
 - dateOfBirth
 - ssn
- Excluded:**
 - addressLine1
 - addressLine2
 - addressLine3
 - addressLine4
 - addressUsageComment
 - adoptedCode
 - adoptedCodeDescription
 - adoptedCodeId
 - ambulatoryStatusCode
 - ambulatoryStatusCodeDescription
 - ambulatoryStatusCodeId

Navigation arrows (<< and >>) are located between the Included and Excluded lists.

Some views have links. The Links section is displayed after the Columns section.

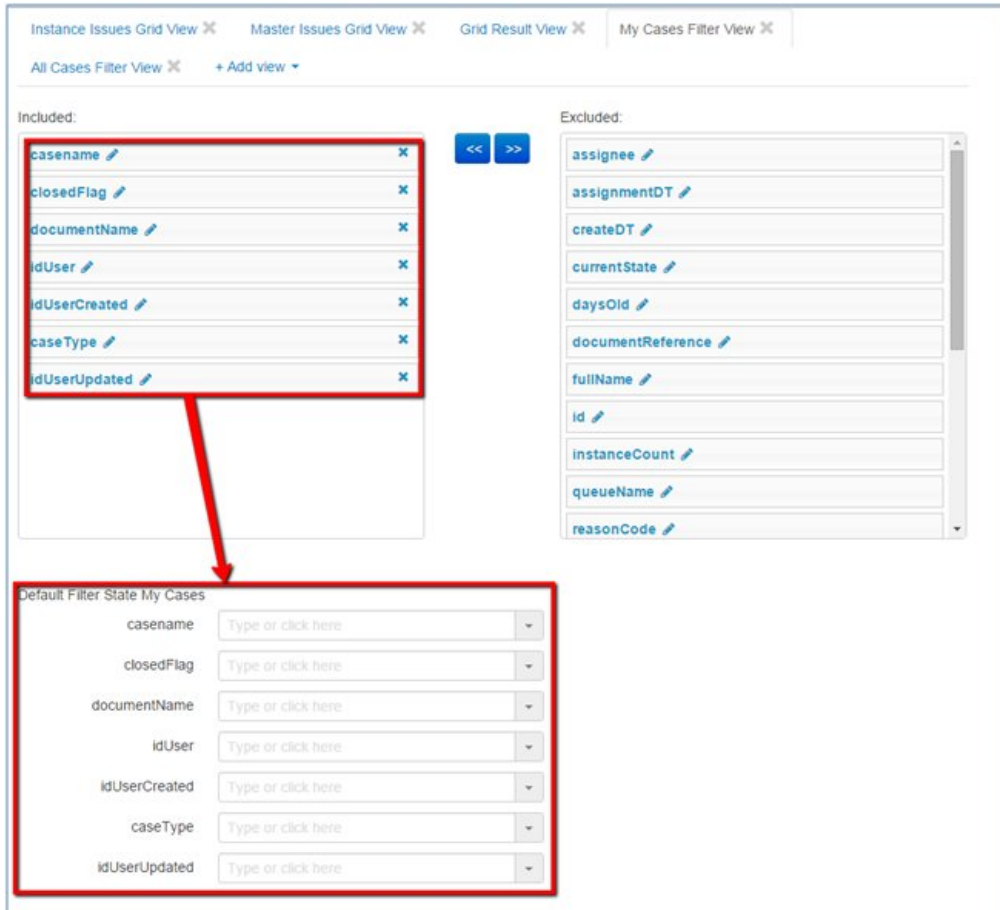


The screenshot shows a 'Links' section with two panels: 'Included:' and 'Excluded:'. The 'Included:' panel contains two items: 'addresses' and 'names', each with a blue pencil icon and a blue 'x' icon. The 'Excluded:' panel contains five items: 'cases', 'contactMethods', 'identifiers', 'instances', and 'preferredProviders', each with a blue pencil icon.

Columns and links can be added in the Included section by dragging and dropping, or deleted by clicking the "x" icon. Tables displayed in the Links section are represented within the application as subdomains/sub-sub domains.

When new options for a View are created, they are displayed on the corresponding View tab after the Columns and Links sections.

For example, the following image shows Default Filtering on the WF User Cases table.



Columns that are placed in the Included section of the My/All cases filter view are displayed in the Default Filtering section as well. If a column is moved to the Excluded section, the column will automatically disappear from the Default Filtering section.

The administrator can select any required value for the field from the drop-down list. Or the administrator can start typing within the field itself to view results that satisfy the filtering criteria.

The image shows two side-by-side screenshots of a web form titled "Default Filter State My Cases". The form contains several fields: "casename", "closedFlag", "documentName", "idUser", "idUserCreated", "caseType", and "idUserUpdated". In the left screenshot, the "casename" dropdown is open, showing "gene" as the selected value. Below it, a search dropdown is open, showing "manual" and "general" as options. In the right screenshot, the "casename" dropdown is open, showing "manual cleansing" as the selected value. Below it, a search dropdown is open, showing "manual matching" and "manual general" as options.

More than one value can be selected for one field if required.

The image shows a screenshot of the "Default Filter State My Cases" form. The "casename" field is highlighted with a blue border and contains two selected values: "manual matching" and "manual general", each with a small "x" icon to its left. The other fields in the form are "closedFlag", "documentName", "idUser", "idUserCreated", "caseType", and "idUserUpdated", all of which have "Type or click here" as their placeholder text.

After the required values are set, the administrator can click *Update* to apply the changes.

Editing a Column

Columns can be edited from the Edit Column page, by clicking on the pencil icon for a corresponding column in the table.

The screenshot displays the 'Edit Column' interface with the following details:

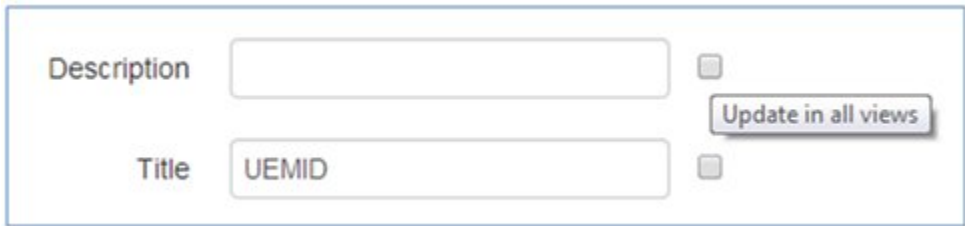
- Navigation Tabs:** Sources, Views, Options, Tables, Table Order, Settings, Exceptions.
- Actions:** + New Column, Edit Column (active), Delete, Help.
- Field Details:**
 - Name: masterId
 - Description: (empty text box)
 - Title: UEMID
 - Table *: Patient Masters
 - Type: String
 - View: Breadcrumb View
 - Treat As: text (dropdown)
 - Width: (empty text box)
 - Alignment: left (dropdown)
- Toggle Switches:**
 - Can Sort: ON
 - Can Filter: ON
 - Can Edit: ON
 - Is Visible: ON
 - Is Logged: OFF
- Buttons:** Update, Delete, Reset.

Several fields, such as Name, Table, Type, and View are not available for editing. The Table and View fields are hyperlinks to corresponding items.

In addition, it is possible to create or delete a current column by clicking the corresponding button.

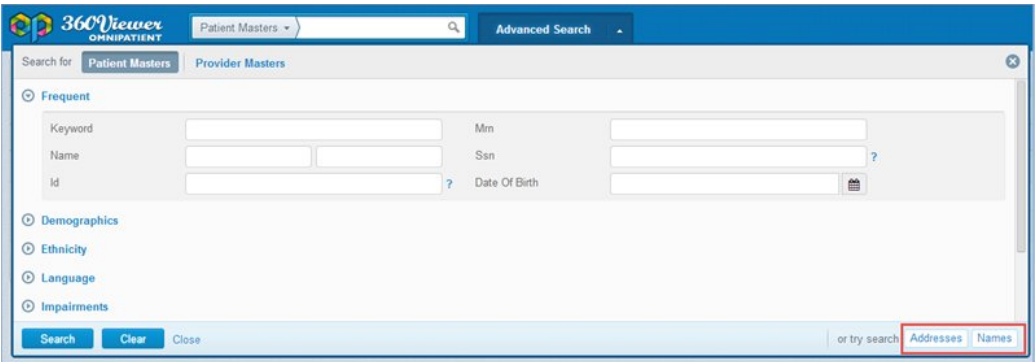
Global Column Editing

There is an *Update in all views* check box near some fields on the Edit Column page. When selected, the appropriate column will be updated in all views for the corresponding table. For example, if an administrator changes a description in the Patient Masters table with this option selected, then the description will be changed in all views for the Patient Masters table.

A screenshot of a web form for editing a column. It shows two rows: 'Description' and 'Title'. The 'Description' row has an empty text input field followed by a checked checkbox. The 'Title' row has the text 'UEMID' in its input field followed by an unchecked checkbox. A button labeled 'Update in all views' is positioned to the right of the 'Description' row's checkbox.

Editing a Link

Links represent sub-domains. Links are used, for example, in the Advanced Search dialog. They allow searching by sub-domain parameters of a record. Links are also used on the Details 360 page, where they display sub-domain tabs.

A screenshot of the '360Viewer OMNIPATIENT' Advanced Search dialog. The dialog has tabs for 'Patient Masters' and 'Provider Masters'. Under the 'Patient Masters' tab, there are sections for 'Frequent' (with fields for Keyword, Name, Id, Min, Sex, Date Of Birth) and 'Demographics' (with expandable sections for Ethnicity, Language, and Impairments). At the bottom, there are 'Search', 'Clear', and 'Close' buttons. On the right side, there is a link 'or try search' followed by 'Addresses' and 'Names', which are highlighted with a red box.

Link can be edited from the Links section on the Edit Table page, by clicking on the pencil icon.

The screenshot shows the 'Edit Link' form within the 'Edit Table' page. The top navigation bar includes 'Sources', 'Views', 'Options', 'Tables', 'Table Order', 'Settings', and 'Exceptions'. Below the navigation bar, there are tabs for 'Link List', '+ New Link', 'Edit Link' (active), and 'Delete'. A 'Help' icon is also present. The form fields are as follows:

- Name:** addresses
- Description:** (empty text box)
- Title:** Addresses
- Table *:** Providers
- View:** Full Info View
- Treat As:** text (dropdown menu)
- Is Visible:** ON (toggle switch)
- Reference Type:** Person Addresses

At the bottom of the form, there are three buttons: 'Update' (blue), 'Delete' (red), and 'Reset' (gray).

Several fields, such as Name, Table, Type, and View are not available for editing. The Table and View fields are hyperlinks to corresponding items.

In addition, it is possible to create or delete a current link by clicking the corresponding button.

Table Order

In this section:

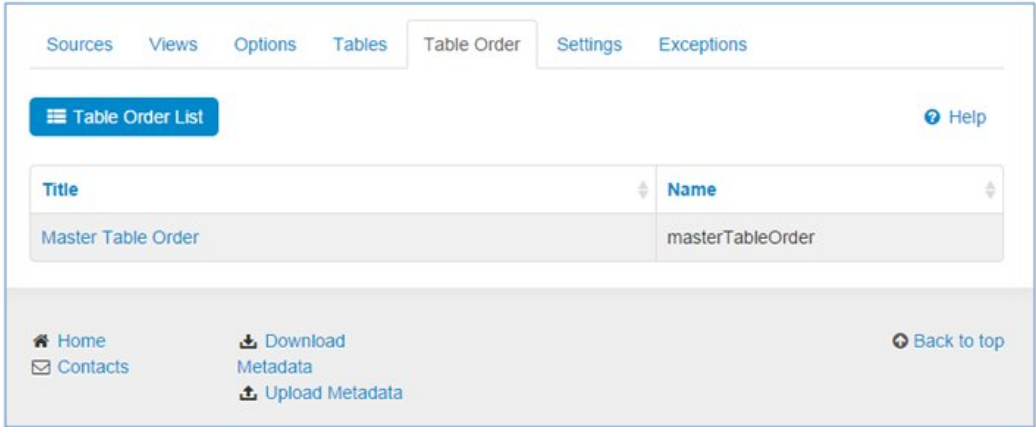
Table Order List

Editing a Table Order

Table Order is a group of Domain tables. Domains included in the Domains drop-down list are displayed based on the order defined in Table Order.

Table Order List

A list of all table orders is displayed on the Table Order List page, as shown in the following image.



Editing a Table Order

The Edit Table Order page is accessible from the Table Order List page by clicking the *Table Order* link and then clicking *Edit Table Order*, as shown in the following image.

The screenshot displays the 'Edit Table Order' interface. At the top, there is a navigation bar with tabs: Sources, Views, Options, Tables, Table Order (selected), Settings, and Exceptions. Below the navigation bar, there is a section with a 'Table Order List' icon, an 'Edit Table Order' button, and a 'Delete' button. A 'Help' icon is also present. The main form area includes a 'Title' field with the value 'Master Table Order' and a 'Name' field with the value 'masterTableOrder'. Below these fields is a 'Tables' section containing a list of tables, each with a blue edit icon: Patient Masters, Provider Masters, Facility Location Masters, Facility Masters, Organization Masters, and Worker Masters. At the bottom of the form, there are three buttons: 'Update' (blue), 'Delete' (red), and 'Cancel' (gray). The footer of the page contains navigation links: Home, Contacts, Download Metadata, Upload Metadata, and Back to top.

Orders can be changed by dragging boxes to the required position and then clicking *Update*.

Settings

In this section:

- Setting List
- Show Setting
- Creating a New Setting
- Editing a Setting

Settings are global variables for configuration per whole application. For now, settings are used to configure the following items:

- ☐ Default date format for date pickers and date fields.
- ☐ Default date time format for that is used for custom date properties that do not belong to any view (for example, activity dates for cases).
- ☐ Defining view of links for actions column in domain view table.
- ☐ Track JavaScript Errors.
- ☐ Show pop ups with copy button in domain view table when hovering records.
- ☐ Load records by default on home page, or after searching only.
- ☐ The number of tables expanded by default on issue search page.
- ☐ Defining of the number of filter sections count.
- ☐ Enabling the ELK logging functionality.
- ☐ Setting the proxy URL.
- ☐ Defining the default display of sections on the Master comparison page.

For example, administrators can change the default date format value to *dd MM yyyy*, and all date fields will be represented in this format.

Setting List

The list of all settings is displayed on the Setting List page, as shown in the following image.

Sources
Views
Options
Tables
Table Order
Settings
Exceptions

Settings List

+ New Setting

Help

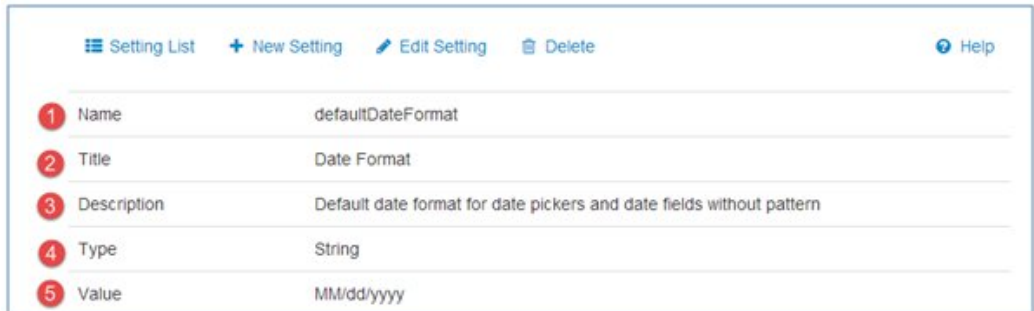
Name	Title	Description	Type	Value
trackJsErrors	Track JavaScript Errors	Track JavaScript Errors	Boolean	true
defaultDateTimeFormat	Date Time Format	Default date time format for that is used for custom date properties that do not belong to any view (e.g. activity dates for cases)	String	yyyy-MM-dd hh:mm:ss a
showPopupWithCopyButton	Show Popup With Copy Button	Show pop ups with copy button in domain view table when hovering records	Boolean	false
showActionIcons	Show Action Icons	Show icons in domain view table for actions	Boolean	true
defaultDateFormat	Date Format	Default date format for date pickers and date fields without pattern	String	MM/dd/yyyy
loadRecordsByDefault	Load records by default	Load records by default on home page, or after searching only	Boolean	false
issuePageTablesCount	Default grid number	The number of grids expanded by default on issue search page.	Numeric	3
issueFilterSectionsCount	Issue Filter Sections Count	Issue Filter Sections Count	Numeric	1
loggingELK	Enable ELK logging	Enable ELK logging	Boolean	false
proxyUrl	Proxy Url	Proxy Url	String	http://omnipat1.ibi.com:8080

Show Setting

Administrators can navigate to the Show Setting page by selecting the corresponding setting from the list. The Show Setting page provides the following information about the selected setting:

- ☐ Setting name
- ☐ Setting title
- ☐ Setting description
- ☐ Setting type

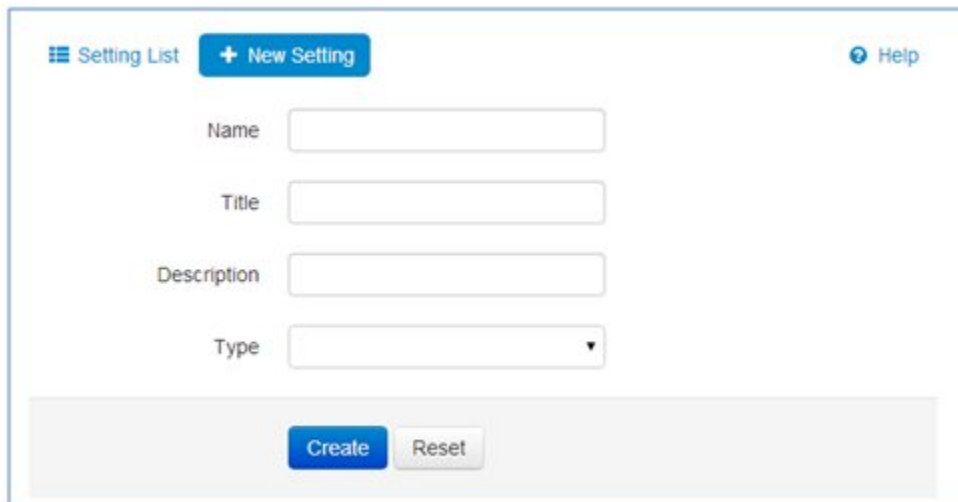
□ Setting value



Setting List	+ New Setting	Edit Setting	Delete	Help
1	Name	defaultDateFormat		
2	Title	Date Format		
3	Description	Default date format for date pickers and date fields without pattern		
4	Type	String		
5	Value	MM/dd/yyyy		

Creating a New Setting

Administrators can create new setting on the New Setting page by clicking the corresponding button on the Show Setting page, as shown in the following image.



Setting List + New Setting Help

Name

Title

Description

Type

Create Reset

Editing a Setting

The Edit Setting page enables administrators to change the properties of a setting. Administrators can navigate to that page by clicking the corresponding button on the Show Setting page, as shown in the following image.

The screenshot shows the 'Edit Setting' page. At the top, there are navigation links: 'Setting List', '+ New Setting', 'Edit Setting' (highlighted), and 'Delete'. A 'Help' icon is also present. The main form has the following fields:

- Name:** defaultDateFormat (disabled)
- Title:** Date Format
- Description:** Default date format for date pick
- Type:** String
- Value:** MM/dd/yyyy

At the bottom of the form, there are three buttons: 'Update' (blue), 'Delete' (red), and 'Reset' (gray).

Note that the Name field and Type field cannot be edited.

Exceptions

In this section:

Exception List

The Exceptions tab contains information about all errors that have occurred in the application. When an error occurs, a user receives an exception ID on the error page, and an administrator can the error condition based on this ID.

Exception List

The list of all exceptions is displayed on the Exception info List page, as shown in the following image. This page is used to provide information for Omni-Patient™ Management Central (OPMC) support and developers in the event of an error occurrence.

Sources

Views

Options

Tables

Table Sets

Settings

Exceptions

ExceptionInfo List

Help

Id	User	Date	Stack trace
▼ 3	projects/wso2sysadmin1	2014-05-20 12.04.33	<div>com.ibi.op.search.SourceResponseException: Response code 404: Not Found at com.ibi.op.config.SourceClientService\$1.doRequest_closure6_closure9.doCall(SourceClientService.groovy:54) at groovyxx.net.http.HTTPBuilder\$1.handleResponse(HTTPBuilder.java:494) at org.apache.http.impl.client.CloseableHttpClient.execute(CloseableHttpClient.java:218) at org.apache.http.impl.client.CloseableHttpClient.execute(CloseableHttpClient.java:160) at groovyxx.net.http.HTTPBuilder.doRequest(HTTPBuilder.java:506) at groovyxx.net.http.HTTPBuilder.doRequest(HTTPBuilder.java:425) at groovyxx.net.http.HTTPBuilder.request(HTTPBuilder.java:401) at com.ibi.op.config.SourceClientService\$1.doRequest(SourceClientService.groovy:38) at com.ibi.op.config.SourceClientService\$1.doGet(SourceClientService.groovy:13) at com.ibi.op.config.SourceService\$1.getEntityTypes(SourceService.groovy:294) at com.ibi.op.config.odata.SourceController.getEntityTypes(SourceController.groovy:73) at grails.plugin.cache.web.filter.PageFragmentCachingFilter.doFilter(PageFragmentCachingFilter.java:200) at grails.plugin.cache.web.filter.AbstractFilter.doFilter(AbstractFilter.java:63) at grails.plugin.springsecurity.web.filter.GrailsAnonymousAuthenticationFilter.doFilter(GrailsAnonymousAuthenticationFilter.java:53) at grails.plugin.springsecurity.web.authentication.RequestHolderAuthenticationFilter.doFilter(RequestHolderAuthenticationFilter.java:49) at grails.plugin.springsecurity.web.authentication.logout.MutableLogoutFilter.doFilter(MutableLogoutFilter.java:82) at java.util.concurrent.ThreadPoolExecutor.runWorker(ThreadPoolExecutor.java:1145) at java.util.concurrent.ThreadPoolExecutor\$Worker.run(ThreadPoolExecutor.java:615) at java.lang.Thread.run(Thread.java:745)</div>
► 2	projects/wso2sysadmin1	2014-05-20 12.04.24	com.ibi.op.search.SourceResponseException: Response code 404: Not Found at com.ibi.op.config.SourceClientServi...
► 1	projects/wso2sysadmin1	2014-05-20 12.01.59	java.lang.RuntimeException: wsdlite soap.SOAPClientException: 500 Internal Server Error at org.springframework.sec...

Downloading and Uploading Metadata

In this section:

- Downloading Metadata
- Uploading Metadata

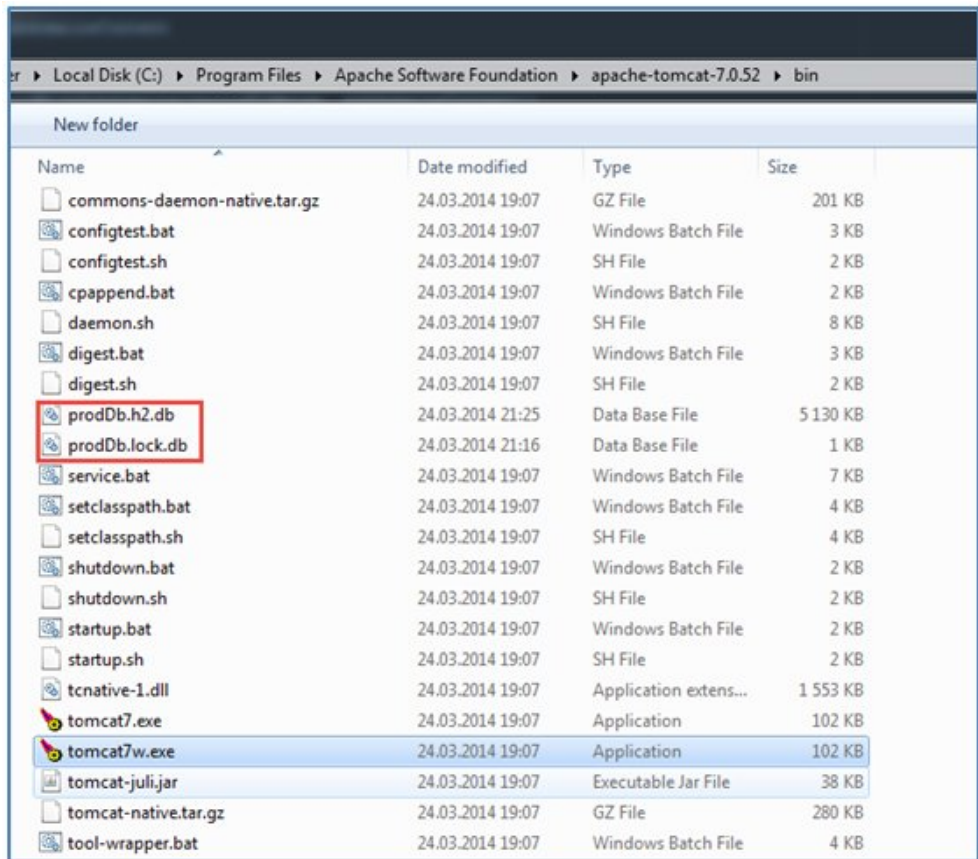
This section describes how to download and upload metadata.

Downloading Metadata

Metadata provides the configuration values for the Omni-Patient™ Management Central (OPMC) application. It describes what sources, domains, and sub-domains (from services, views, settings, and so on) are used within the application. Metadata is stored in XML format in a file-based database.

A metadata.xml file is read into and is validated while it populates the OPMC configuration database, and initializes application settings.

The configuration database is stored in two files, as shown in the following image.



The database is created during the first deployment of OPMC when an existing configuration database (prodDb.h2.db) is not present.

Administrators can download the runtime database of metadata stored as prodDB.h2.db (as shown in the above image) and convert it into a readable metadata XML file by clicking the *Download Metadata* link.

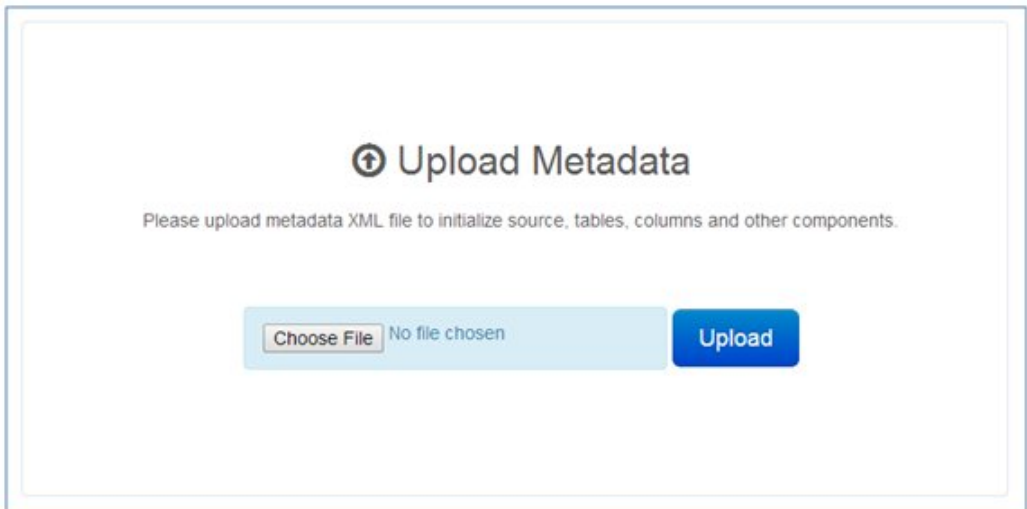
The download link is displayed in the footer of the page, as shown in the following image.



Uploading Metadata

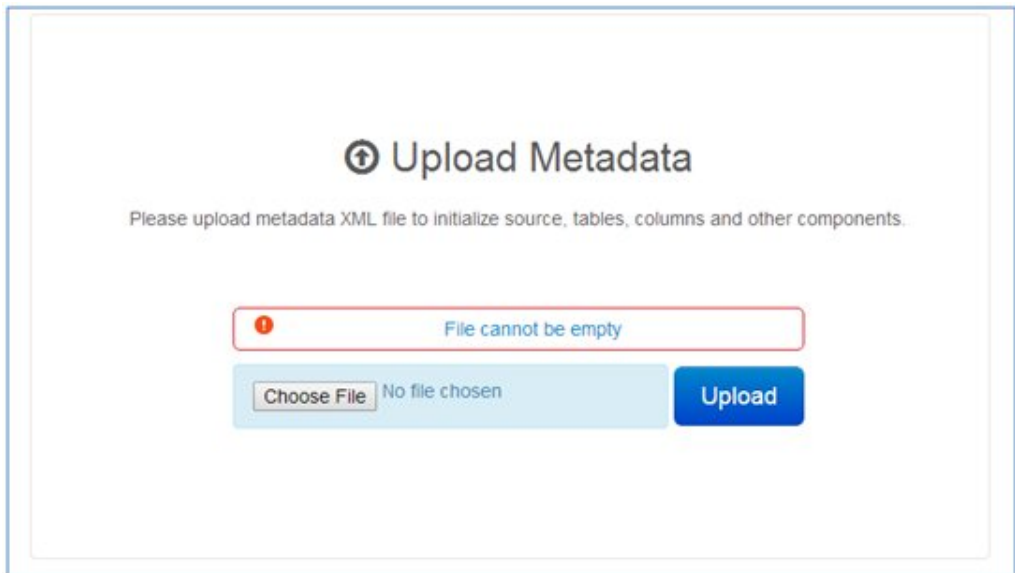
You can configure an application from metadata that is stored in an XML file. There are three scenarios for uploading metadata:

1. Upon the first deployment of the application, when the configuration database is empty. After authorization, the first log in attempt by a user with the System Administrator role will be redirected to the Upload Metadata page. Here, the administrator will be able to select the configuration file that will be provided separately.
2. It is possible to upload metadata without redeployment, when the application is already configured, by clicking the *Upload Metadata* link. It is advisable to do this only if the data structure has not changed, and only some columns or views were edited. Otherwise, the application may crash. In this case, follow the instructions in the third scenario.
3. If remote services were upgraded and the data structure was changed (the application can no longer function), using the second scenario will not work. In that case, stop the application, remove the configuration database, and follow the instructions in the first scenario.



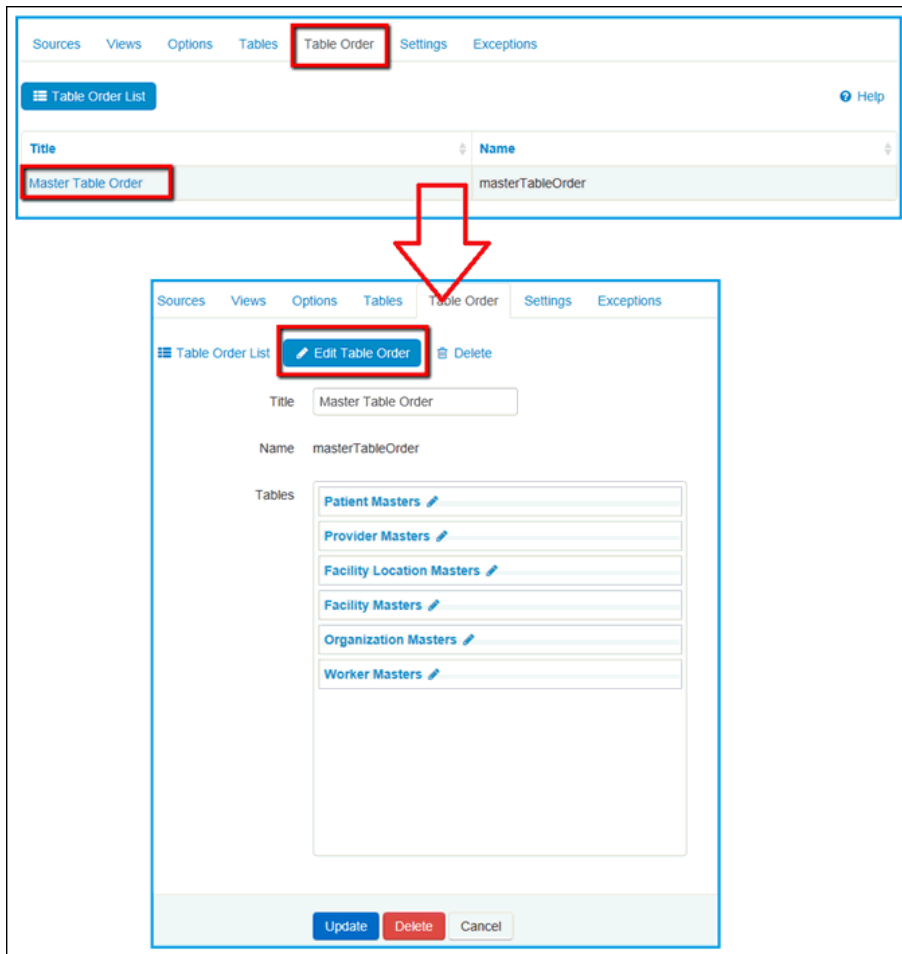
The screenshot shows a web interface titled "Upload Metadata" with a circular icon containing a plus sign. Below the title, a message reads: "Please upload metadata XML file to initialize source, tables, columns and other components." At the bottom, there is a light blue box containing a "Choose File" button and the text "No file chosen". To the right of this box is a blue "Upload" button.

Before uploading, the file is validated to ensure that the format is correct. If the format is incorrect or the file is empty, an error message appears, as shown in the following image.



Configuring 360 Viewer

To configure the order of domains in the Domain drop-down list, click the Table Order tab and then click *Master Table Order*. You can change the order of the Domains by dragging the domain boxes and then clicking *Update*.



For configuring table columns (Home, Search pages) edit the particular table and include or exclude the necessary columns in the Grid Result View. Each domain has its own set of columns that configures to the appropriate Master tables (Patient Master, Provider Master, Worker Master, and so on), as shown in the following image.

Table List + New Table Edit Table Delete Help

Source OmniSource

Table PatientMaster

Name Patient Masters

Record Name Patient Name for single table record

Grid Result View Quick Details View Full Info View Record Properties View Advanced Search View Frequent Search View

Related Instances View Breadcrumb View + Add view

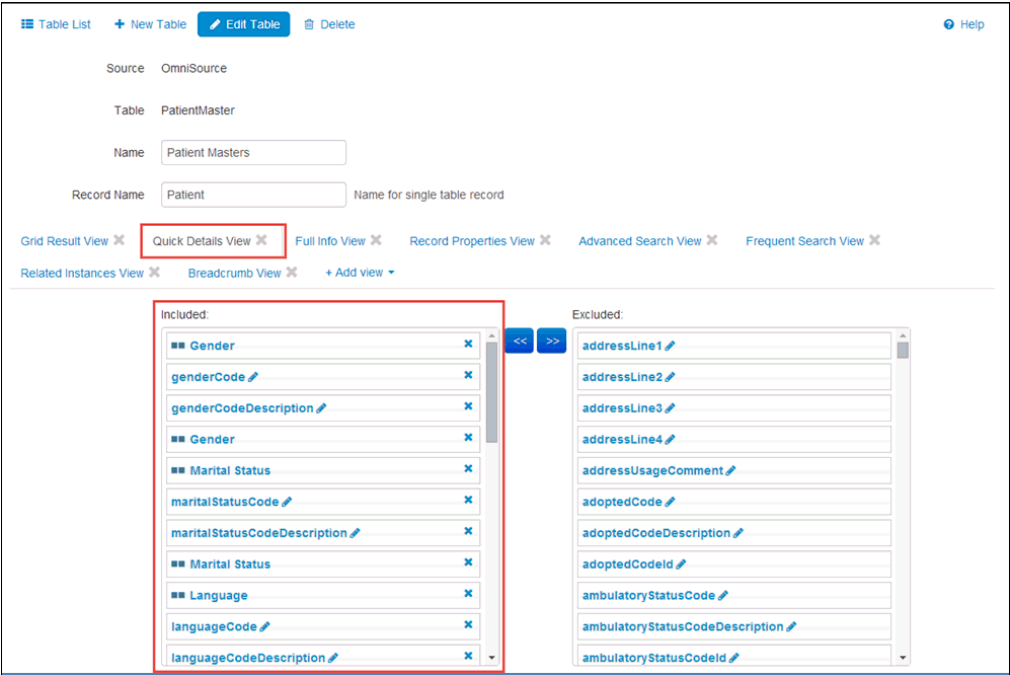
Included:

- masterId
- firstName
- middleName
- lastName
- dateOfBirth
- addressLine1
- city
- stateProvinceCodeDescription
- postalCode
- omniModifiedDate

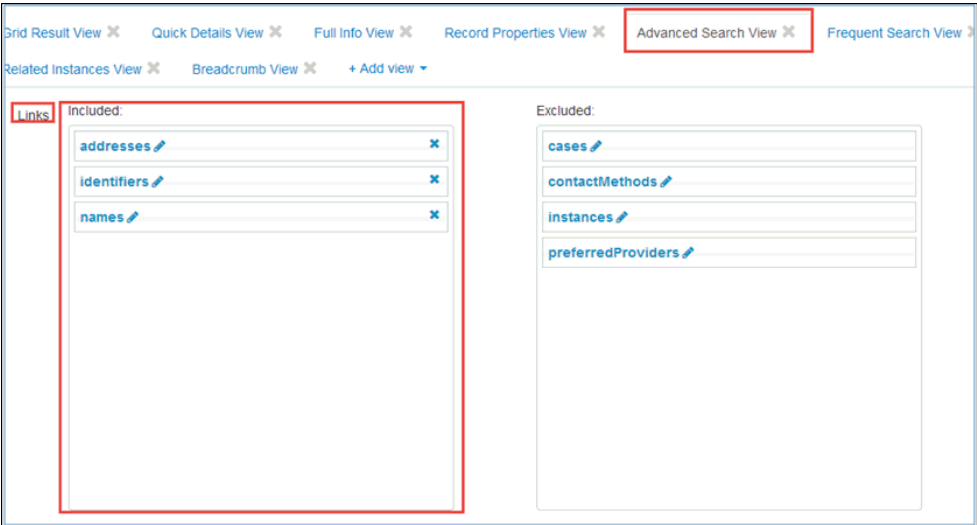
Excluded:

- addressLine2
- addressLine3
- addressLine4
- addressUsageComment
- adoptedCode
- adoptedCodeDescription
- adoptedCodeId
- ambulatoryStatusCode
- ambulatoryStatusCodeDescription
- ambulatoryStatusCodeId
- badDebtCode

To configure columns for record details, edit the appropriate table and include or exclude the necessary columns in the Quick Details View.



To configure subdomain links for advanced search panels, include or exclude the necessary links in the Advanced Search View tab for the corresponding domain table.



To configure fields in the Frequent Search View, include or exclude the necessary columns, as shown in the following image.

Table: PatientMaster

Name: Patient Masters

Record Name: Patient Name for single table record

Info Tab Indicator: ☐ OFF Indicates whether a table is an information kind of tab

Is Logged: ☒ ON Log events from this table

Breadcrumb View ☒ Related Instances View ☒ **Frequent Search View ☒** Advanced Search View ☒

Record Properties View ☒ Full Info View ☒ Quick Details View ☒ Grid Result View ☒ + Add view ▾

Included:

firstName	✕
lastName	✕
dateOfBirth	✕
mrn	✕
ssn	✕

Excluded:

addressLine1
addressLine2
addressLine3
addressLine4
addressUsageComment
adoptedCode
adoptedCodeDescription
adoptedCodeId
ambulatoryStatusCode
ambulatoryStatusCodeDescription
ambulatoryStatusCodeId

To configure all Advanced Search sections (except Frequent section) and their attributes, include or exclude the necessary columns in the Advanced Search View, as shown in the following image.

Table PatientMaster

Name Patient Masters

Record Name Patient

Name for single table record

Info Tab Indicator OFF

Indicates whether a table is an information kind of tab

Is Logged ON

Log events from this table

Breadcrumb View X

Related Instances View X

Frequent Search View X

Advanced Search View X

Record Properties View X

Full Info View X

Quick Details View X

Grid Result View X

+ Add view

Included:

Demographics X

firstName X

lastName X

motherMaidenName X

middleName X

ssn X

mrn X

dateOfBirth X

Excluded:

addressLine1

addressLine2

addressLine3

addressLine4

addressUsageComment

adoptedCode

adoptedCodeDescription

adoptedCodeId

ambulatoryStatusCode

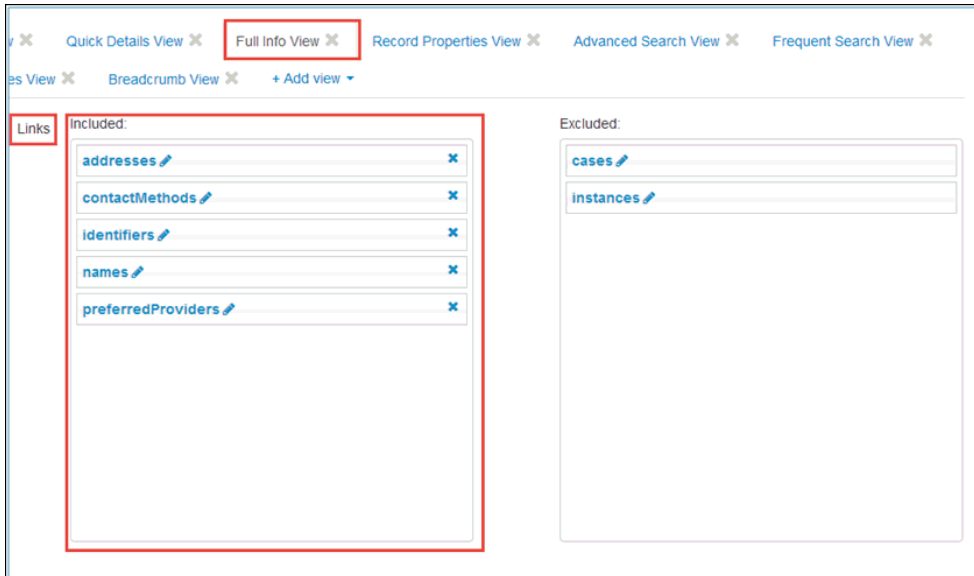
ambulatoryStatusCodeDescription

ambulatoryStatusCodeId

64

iWay Software

To configure subdomains for Details 360 and Master Comparison pages, edit the Master table and include or exclude the necessary links in the Full Info View tab, as shown in the following image.



In the Full Info View tab, you can configure sections and their attributes for Domain or Subdomain (for example, Details 360, Master Comparison, and Compare Source pages) by including or excluding the necessary columns, as shown in the following image.

Table PatientMaster

Name Patient Masters

Record Name Patient

Name for single table record

Info Tab Indicator OFF

Indicates whether a table is an information kind of tab

Is Logged ON

Log events from this table

Breadcrumb View X

Related Instances View X

Frequent Search View X

Advanced Search View X

Record Properties View X

Full Info View X

Quick Details View X

Grid Result View X

+ Add view v

Included:

Demographics X

firstName X

middleName X

lastName X

fullName X

suffix X

prefix X

title X

dateOfBirth X

ssn X

addressLine1 X

<< >>

Excluded:

adoptedCodeId

ambulatoryStatusCodeId

badDebtCodeId

blindCodeId

careLanguageCodeId

citizenshipCodeId

countryCodeId

countyRegionCodeId

deafCodeId

deceasedCodeId

disabilityCodeId

To configure the Record Properties section attributes, include or exclude the necessary columns in the Record Properties View, as shown in the following image.

The screenshot displays the configuration interface for the 'PatientMaster' table. At the top, the table name is 'PatientMaster'. Below it, the 'Name' field is 'Patient Masters' and the 'Record Name' is 'Patient'. The 'Info Tab Indicator' is set to 'OFF' and 'Is Logged' is set to 'ON'. A row of view tabs is shown: 'Breadcrumb View', 'Related Instances View', 'Frequent Search View', 'Advanced Search View', 'Record Properties View' (highlighted with a red box), 'Full Info View', 'Quick Details View', 'Grid Result View', and '+ Add view'. Below the tabs, there are two sections: 'Included:' and 'Excluded:'. The 'Included:' section, also highlighted with a red box, contains two items: 'masterid' and 'omniModifiedDate'. The 'Excluded:' section contains a list of attributes including 'addressLine1', 'addressLine2', 'addressLine3', 'addressLine4', 'addressUsageComment', 'adoptedCode', 'adoptedCodeDescription', 'adoptedCodeId', 'ambulatoryStatusCode', 'ambulatoryStatusCodeDescription', and 'ambulatoryStatusCodeId'. Navigation arrows '<<' and '>>' are positioned between the two sections.

Table	PatientMaster
Name	Patient Masters
Record Name	Patient
Info Tab Indicator	OFF
Is Logged	ON

Breadcrumb View X Related Instances View X Frequent Search View X Advanced Search View X

Record Properties View X Full Info View X Quick Details View X Grid Result View X + Add view

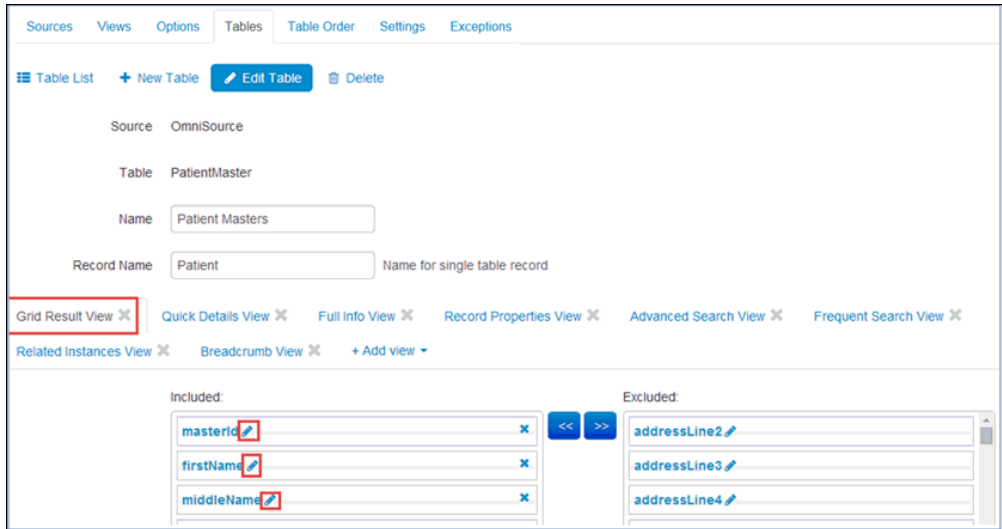
Included:

- masterid X
- omniModifiedDate X

Excluded:

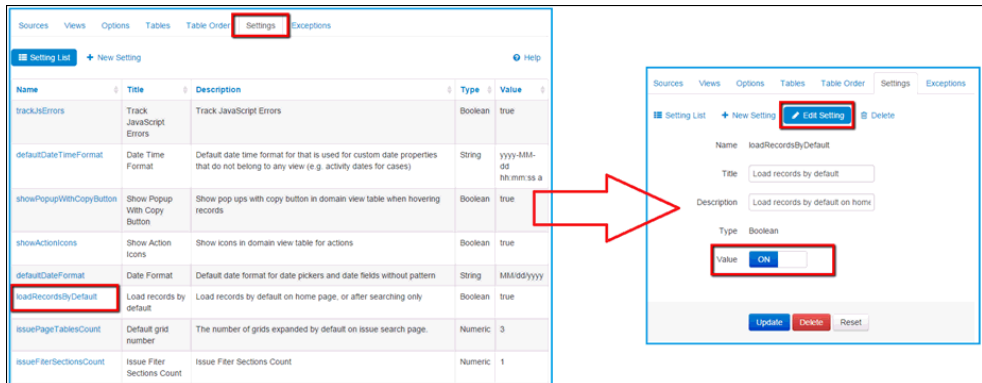
- addressLine1
- addressLine2
- addressLine3
- addressLine4
- addressUsageComment
- adoptedCode
- adoptedCodeDescription
- adoptedCodeId
- ambulatoryStatusCode
- ambulatoryStatusCodeDescription
- ambulatoryStatusCodeId

To configure the size, alignment of columns, and the columns to be sorted and filtered, click the pencil icon (Edit) in Grid Result View, as shown in the following image.



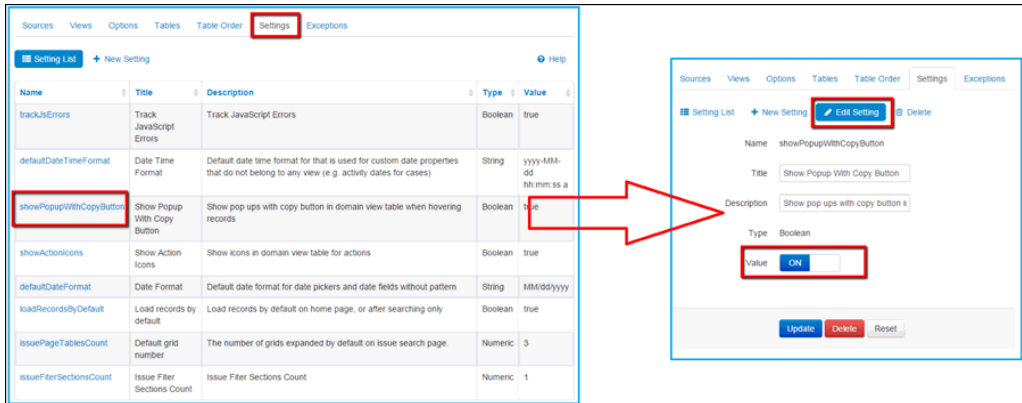
To select the default state of the Home Page, click the Settings tab, select the *Load records by default* setting from the list, and then edit the parameters accordingly.

If you wish to display the grid on the page by default, select *ON* in Value field and then click *Update*. Otherwise, select *OFF*.



To configure the Copy button in Popup windows, click the *showPopupWithCopyButton* setting in the Settings tab and edit it accordingly.

If you wish to display the Copy button, select **ON** in Value field and then click **Update**. Otherwise, select **OFF**.

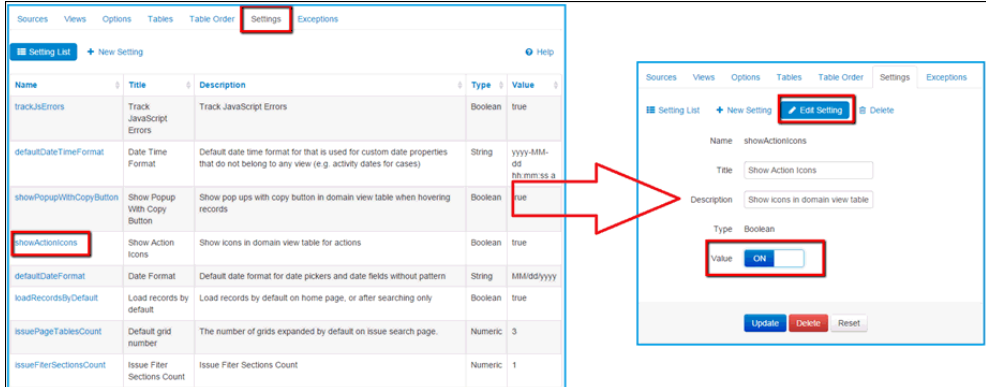


The screenshot shows the 'Settings' tab in the application. A table lists various settings. The 'showPopupWithCopyButton' setting is highlighted with a red box. An arrow points from this row to a detailed edit form on the right. In the edit form, the 'Value' field is set to 'ON' and is also highlighted with a red box. The 'Update' button is visible at the bottom of the form.

Name	Title	Description	Type	Value
trackJsErrors	Track JavaScript Errors	Track JavaScript Errors	Boolean	true
defaultDateTimeFormat	Date Time Format	Default date time format for that is used for custom date properties that do not belong to any view (e.g. activity dates for cases)	String	yyyy-MM-dd hh:mm:ss a
showPopupWithCopyButton	Show Popup With Copy Button	Show pop ups with copy button in domain view table when hovering records	Boolean	true
showActionIcons	Show Action Icons	Show icons in domain view table for actions	Boolean	true
defaultDateFormat	Date Format	Default date format for date pickers and date fields without pattern	String	MM/dd/yyyy
loadRecordsByDefault	Load records by default	Load records by default on home page, or after searching only	Boolean	true
issuePageTablesCount	Default grid number	The number of grids expanded by default on issue search page.	Numeric	3
issueFilterSectionsCount	Issue Filter Sections Count	Issue Filter Sections Count	Numeric	1

To configure the Master comparison and Details 360 display screens, click the Settings tab, then click the **showActionIcons** link from the list and edit it accordingly.

To display the Master comparison and Details 360 as icons, set the Value parameter to **ON**, and then click **Update**. Otherwise, to display them as links, set the Value parameter to **OFF** and then click **Update**.



The screenshot shows the 'Settings' tab in the application. A table lists various settings. The 'showActionIcons' setting is highlighted with a red box. An arrow points from this row to a detailed edit form on the right. In the edit form, the 'Value' field is set to 'ON' and is also highlighted with a red box. The 'Update' button is visible at the bottom of the form.

Name	Title	Description	Type	Value
trackJsErrors	Track JavaScript Errors	Track JavaScript Errors	Boolean	true
defaultDateTimeFormat	Date Time Format	Default date time format for that is used for custom date properties that do not belong to any view (e.g. activity dates for cases)	String	yyyy-MM-dd hh:mm:ss a
showPopupWithCopyButton	Show Popup With Copy Button	Show pop ups with copy button in domain view table when hovering records	Boolean	true
showActionIcons	Show Action Icons	Show icons in domain view table for actions	Boolean	true
defaultDateFormat	Date Format	Default date format for date pickers and date fields without pattern	String	MM/dd/yyyy
loadRecordsByDefault	Load records by default	Load records by default on home page, or after searching only	Boolean	true
issuePageTablesCount	Default grid number	The number of grids expanded by default on issue search page.	Numeric	3
issueFilterSectionsCount	Issue Filter Sections Count	Issue Filter Sections Count	Numeric	1

To configure the display of information tabs, click the Tables tab, select the required table from the list, and edit it accordingly.

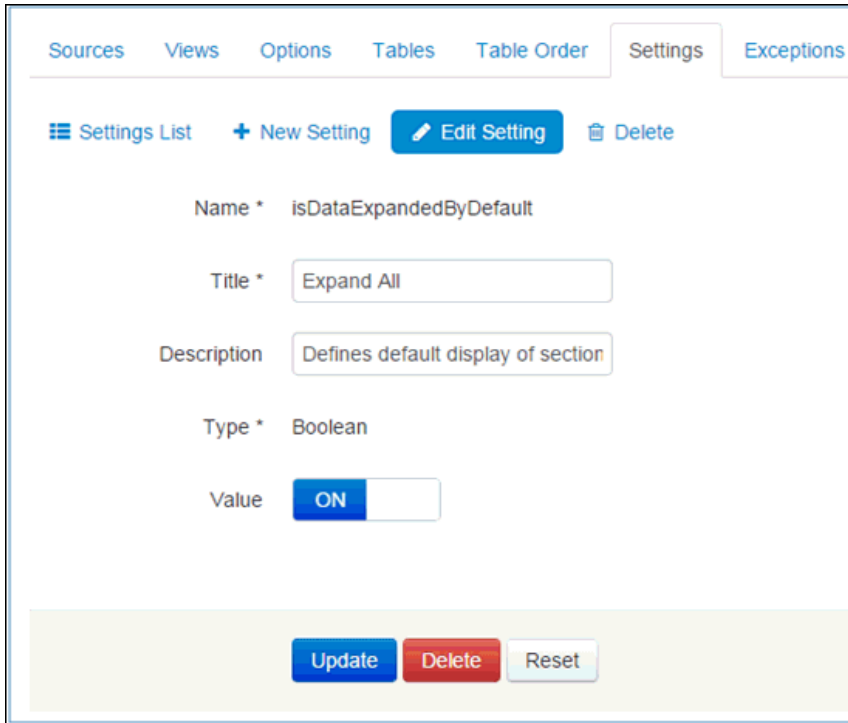
To display the table as an Information tab, set the Info Tab Indicator parameter to *ON*. Otherwise, to display the table as an ordinary sub-domain, set the Info Tab Indicator to *OFF*.

The screenshot displays the configuration interface for 360 Viewer, specifically the 'Tables' tab. The interface includes a top navigation bar with tabs: Sources, Views, Options, Tables (highlighted), Table Order, Settings, and Exceptions. Below the navigation bar, there are buttons for 'Table List', '+ New Table', 'Edit Table' (highlighted with a red box), and 'Delete'. The main configuration area shows the following details:

- Source: OmniSource
- Table: ProviderLicenseMaster
- Name: Provider License Masters
- Record Name: Provider License
- Info Tab Indicator: ON (highlighted with a red box)
- Is Logged: ON

Additional information includes a description for 'Info Tab Indicator': 'Indicates whether a table is an information kind of tab' and a description for 'Is Logged': 'Log events from this table'. At the bottom, there are view options: Breadcrumb View, Advanced Search View, Record Properties View, Full Info View, Quick Details View, and Grid Result View, along with an '+ Add view' button.

You can configure the default display of sections on the Master Comparison page. All sections on Master Comparison page can be collapsed or expanded by default. It can be configured using the setting *IsDataExpandedByDefault*, as shown in the following image.



The screenshot shows a web interface for configuring application settings. At the top, there are tabs: Sources, Views, Options, Tables, Table Order, Settings (selected), and Exceptions. Below the tabs, there is a settings list with buttons for 'Settings List', '+ New Setting', 'Edit Setting', and 'Delete'. The main content area displays the configuration for the 'isDataExpandedByDefault' setting. It includes fields for Name, Title, Description, Type, and Value. The Name field is labeled 'Name *' and contains the text 'isDataExpandedByDefault'. The Title field is labeled 'Title *' and contains the text 'Expand All'. The Description field is labeled 'Description' and contains the text 'Defines default display of section'. The Type field is labeled 'Type *' and contains the text 'Boolean'. The Value field is labeled 'Value' and contains a toggle switch set to 'ON'. At the bottom of the form, there are three buttons: 'Update', 'Delete', and 'Reset'.

Field	Value
Name *	isDataExpandedByDefault
Title *	Expand All
Description	Defines default display of section
Type *	Boolean
Value	ON

If you want all sections to be expanded by default, set the Value parameter to *ON*. Otherwise, set the Value to *OFF* to collapse all sections by default.

Configuring Remediation Pages

In this section:

Issues Page
Override Matching Page
Manual Cleansing Page
General Issue Page
Issues Pop Up
Domain Grid Configuration
Breadcrumbs Configuration
Sub-domains Configuration

This section describes the configurations for the remediation pages.

Issues Page

In this section:

Case Issues Grid
Ticket Issues Grid
Filtering Panel on My Cases Tab
Filtering Panel on All Cases Tab
Number of Filtering Criteria Sections Expanded by Default
Default Filtering on My Cases/All Cases Tab
Switching ON/OFF of Multiselect Drop-down List on My Cases/All Cases Tabs

The Administration panel is available for users with the System Administrator role.

You must first identify which grid on the Issues page needs to be configured.

- ❑ If the Parent grid needs to be configured, click the Tables tab and select the *WF Cases* table from the list of tables.
- ❑ If the Inline grid needs to be configured, click the *WF Tickets* table from the list of tables.

Case Issues Grid

The Case Issues Grid view is responsible for the looks and appearance of the Case Grid in the All Cases and My cases tab of the Issues Search page. The view consists of the following parts:

- ❑ general
- ❑ domain

The general-related part includes columns which are common for all domains and configurations in the main Included section of the Case Issues Grid view.

The domain columns are displayed next to the general columns in the grid and can each be preconfigured for the current user domain.

In order to configure how the Case grids appear on the Issues Search page, click the Tables tab and select *WF Cases* from the list of tables. The table should consist of the following views:

- ❑ My filter Issues Grid
- ❑ All Filter Issues Grid
- ❑ Advanced Search View
- ❑ Case Issues Grid View

First, check if the current metadata contains a particular view in Views List. If the Case Issues Grid View is not created yet, delete the existing Master Issues Grid View, then click the *New View* button and fill in the required fields, as shown in the following image.

The screenshot shows the 'Views List' configuration page. At the top, there are tabs: Sources, Views (selected), Options, Tables, Table Order, Settings, and Exceptions. Below the tabs, there is a 'Views List' section with a '+ New View' button. The form for creating a new view is displayed with the following fields and options:

- Title:** Case Issues Grid View
- Name:** caseIssuesGridView
- Exclude All:** ON (checked)
- Has Column Groups:** OFF
- Has Column Sub Groups:** OFF
- Has Column Sections:** OFF
- Has Links:** OFF

At the bottom of the form, there are two buttons: 'Create' and 'Reset'.

Click *Create* and then click the *Tables* tab, open the *WF Cases* table, and click *Edit Table*. Add the required Views from the *Add View* drop-down list and exclude any that are not required. To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

Click the X icon if you wish to exclude a column from the view.

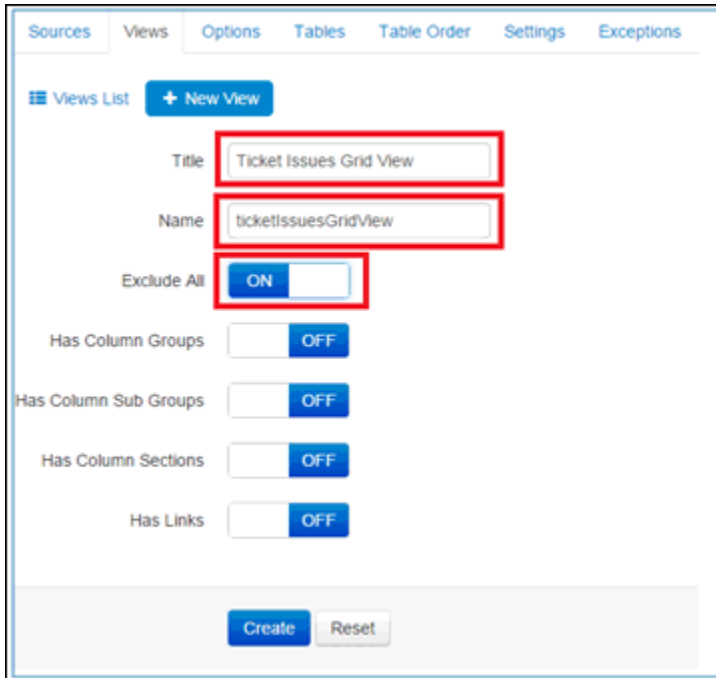
The screenshot displays the PartyMaster application interface. At the top, there's a header bar with 'PartyMaster' and a 'general' tab. Below this, a table shows two records. The table headers are: Id, Severity, Systems, Ssn, Id User Created, Create D T, Update D T, Days Old, Ticket Count, Lastname, and Firstname. A red box highlights these headers, and a red arrow points to the 'Systems' header. A blue box highlights the 'Lastname' and 'Firstname' headers. Below the table, there are two panels: 'My Cases Filter View' and 'Case Issues Grid View'. The 'Case Issues Grid View' panel has an 'Included' list with fields like id, severity, systems, ssn, idUserCreated, createDT, updateDT, daysOld, ticketCount, lastname, and firstname. A blue arrow points from the 'Lastname' header to the 'lastname' field in this list. Another blue arrow points from the 'Firstname' header to the 'first_name' field in the 'Domain Columns' panel.

Ticket Issues Grid

The Ticket Issues Grid View is responsible for how the Inline grid appears, which is used to display Ticket details. In order to configure the Inline grids in the Issues Search page, click the Tables tab and select *WF Tickets* from the list of tables. That table should consist of the following views:

- ☐ My filter Issues Grid
- ☐ All Filter Issues Grid
- ☐ Ticket Issues Grid View.

Check if the current metadata contains a particular View in Views list. If the Ticket Issues Grid View is not created yet, delete the existing Instance Issues Grid View, then click the New View button and fill in the required fields, as shown in the following image.



The screenshot shows the 'Views List' configuration page. The 'Title' field is 'Ticket Issues Grid View' and the 'Name' field is 'ticketIssuesGridView'. The 'Exclude All' toggle is set to 'ON'. The 'Has Column Groups', 'Has Column Sub Groups', 'Has Column Sections', and 'Has Links' toggles are all set to 'OFF'. The 'Create' and 'Reset' buttons are at the bottom.

Click *Create*, and click *Tables* tab, then open the *WF Tickets* table and click *Edit Table*.

Add the required Views from the *Add View* drop-down list and exclude any that are not required.

To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

Click the X icon if you wish to exclude a column from the view.

The screenshot displays the 'PartyMaster' application interface. At the top, there are tabs for 'PartyMaster' and 'general'. Below these, a table shows ticket data with columns: Id, Severity, Systems, Ssn, Id User Created, Create D T, Update D T, Days Old, and Ticket Count. A red box highlights the 'Reason Code' column in this table, with a red arrow pointing to it. Below the table, there is a 'Ticket Issues Grid View' configuration panel. This panel has two sections: 'Included' and 'Excluded'. The 'Included' section is highlighted with a red box and contains a list of columns with an 'X' icon next to each, indicating they are included in the view. The 'Excluded' section contains a list of columns that are not included. The 'Included' list includes: id, ticketSeverity, ticketType, reasonCode, createDT, updateDT, idUserCreated, idUserUpdated, reasonDesc, and closedFlag. The 'Excluded' list includes: assignmentDT, caseId, caseType, currentState, documentName, documentReference, documentType, idSCXML, idTicketParent, idUserAssigned, and queueName.

Id	Ticket Severity	Ticket Type	Reason Code	Create D T	Update D T	Id User Created	Id User Updat...	Reason Desc	Closed Flag
7AA17A1C-23...	general	Manually Edited	10/28/2015	10/28/2015	PRIMARY/nad...	PRIMARY/nad...	comment add...	false	
DBDB1718-82...	general	Manually Edited	10/28/2015	10/28/2015	PRIMARY/nad...	PRIMARY/nad...	comment add...	false	

Showing 1-2 of 2 records. Number of records per page 10

Showing 1-2 of 2 records. Number of records per page 10

Showing 1-2 of 2 records. Number of records per page 10

Showing 1-2 of 2 records. Number of records per page 10

My Cases Filter View X Cases Filter View X Ticket Issues Grid View X + Add view

Included:

- id X
- ticketSeverity X
- ticketType X
- reasonCode X
- createDT X
- updateDT X
- idUserCreated X
- idUserUpdated X
- reasonDesc X
- closedFlag X

Excluded:

- assignmentDT
- caseId
- caseType
- currentState
- documentName
- documentReference
- documentType
- idSCXML
- idTicketParent
- idUserAssigned
- queueName

The configuration of nested columns (for example, display name, sortable, filterable) are available by clicking the pencil (edit) icon for the appropriate columns and updating the corresponding options.

Edit Column

Name: fullName

Description:

Title: Name

Table: Patient Masters

Type: String

View: Breadcrumb View

Treat As: text

Width:

Alignment: left

Can Sort: ☒ ON

Can Filter: ☒ ON

Can Edit: ☐ OFF

Is Visible: ☒ ON

Is Logged: ☐ OFF

Update **Reset**

Filtering Panel on My Cases Tab

In order to configure the Filtering Panel for cases on the Issues page, click the Tables tab and then click *WF Cases* from the list of tables. If the Filtering panel for tickets needs to be configured, then the *WF Tickets* table should be edited.

The My Cases Filter View is responsible for the list of filtering criteria displayed in the Filtering panel of the My Cases tab, as shown in the following image.

The screenshot displays the configuration interface for the 'My Cases Filter View'. At the top, the 'Table' is set to 'WF Cases'. Below this, there are fields for 'Name' (WF Cases), 'Record Name' (Record), and an 'Info Tab Indicator' (OFF). A navigation bar shows several views: 'Instance Issues Grid View', 'Master Issues Grid View', 'Grid Result View', 'My Cases Filter View' (highlighted with a red box), and 'All Cases Filter View'. The main area is divided into 'Included' and 'Excluded' columns. The 'Included' column (highlighted with a red box) contains a list of columns with an 'X' icon next to each: caseType, casename, closedFlag, severity, recordStatus, sourceName, currentState, daysOld, documentName, and idUserCreated. The 'Excluded' column contains a list of columns: assignee, assignmentDT, createDT, documentReference, fullName, id, idUser, idUserUpdated, instanceCount, queueName, and reasonCode. A red arrow points from the 'fullName' column in the 'Excluded' section to the 'Full Name' filter in the 'Filters' panel on the right. The 'Filters' panel shows a filter for 'assignee: ME' and a section for 'Case Type' with options: cleansing (6), general (4), and matching (5). Below this, there is a list of filters: Casename, Closed Flag, Severity, Record Status, Source Name, Current State, Days Old, Document Name, and Id User Created.

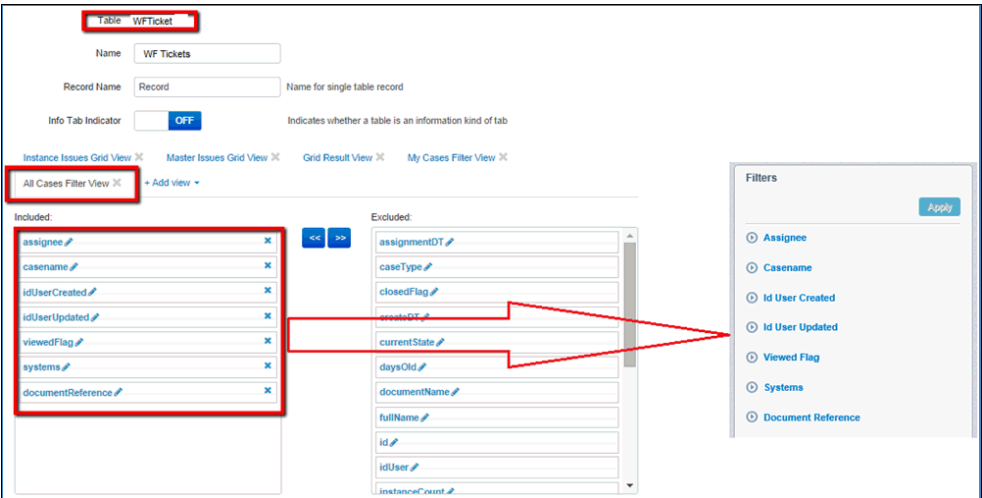
To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

Click the X icon if you wish to exclude a column from the view.

Filtering Panel on All Cases Tab

In order to configure the Filtering Panel for cases on the Issues page, click the Tables tab and then click *WF Cases* from the list of tables. If the Filtering panel for tickets needs to be configured, then the *WF Tickets* table should be edited.

The All Cases Filter View is responsible for the list of filtering criteria displayed in the Filtering panel of the All Cases tab.



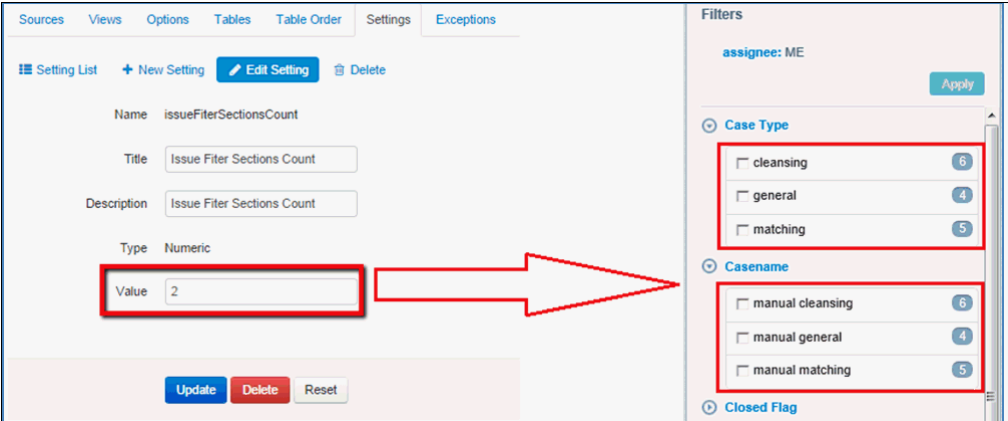
To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

Click the X icon if you wish to exclude a column from the view.

Number of Filtering Criteria Sections Expanded by Default

In order to change the number of Filtering criteria sections expanded by default, click the Settings tab and select *Issue Filter Sections Count* from the list.

The number entered in the Value field corresponds to the number of sections to be expanded by default in the Filtering Panel of the Issues page.



This setting is applied to Filtering panels on both the My Cases and All Cases tabs.

Default Filtering on My Cases/All Cases Tab

In order to have default filters in the issue search page, you must create the following options accordingly:

- ☐ DefaultFiltersMyCases
- ☐ DefaultFiltersAllCases

The screenshot displays the 'Options' configuration page. At the top, there are tabs for 'Sources', 'Views', 'Options' (selected), 'Tables', 'Table Order', 'Settings', and 'Exceptions'. Below the tabs, there is an 'Options List' section with a '+ New Option' button. The form fields are as follows:

- Title:** Default Filter State My Cases
- Name:** DefaultFilterStateMyCases
- Description:** DefaultFilterStateMyCases
- Type:** String (dropdown menu)
- Default Value:** (empty text field)
- Path Type:** view (dropdown menu)
- Path Name:** My Cases Filter View (dropdown menu)

At the bottom of the form, there are two buttons: 'Create' and 'Reset'.

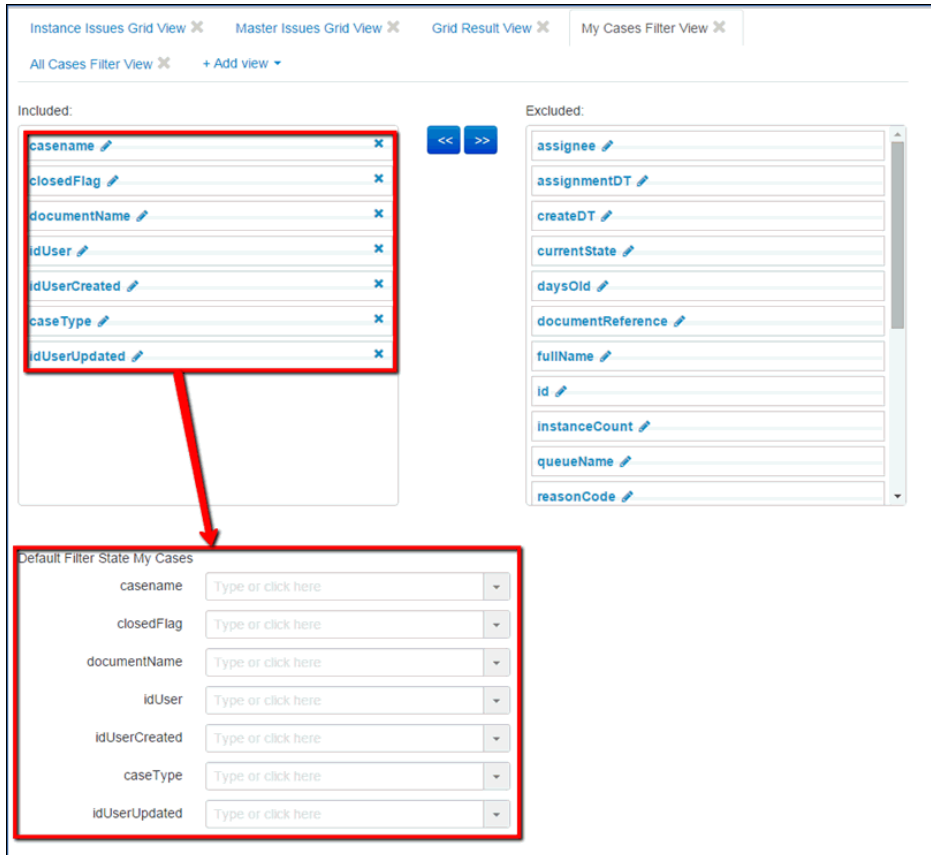
You must perform the same steps for the All Cases tab.

When the options are created, they will appear in a list of options, as shown in the following image.

Title	Name	Description	Type	Default Value	Path Type	Path Name
Record Name	tableRecordName	Name for single table record	String	Record	table	
Info Tab Indicator	isInfoTab	Indicates whether a table is an information kind of tab	Boolean	false	table	
Is Logged	isLogged	Log events from this table	Boolean	true	table	
DefaultFilterStateMyCases	DefaultFilterStateMyCases	DefaultFilterStateMyCases	String		view	myCasesFilterView
DefaultFilterStateAllCases	DefaultFilterStateAllCases	DefaultFilterStateAllCases	String		view	allCasesFilterView

After the options have been added, add the required values to the default filtering section for the corresponding tab of the WF Cases table.

The following image shows the columns that are in the Included section of the My Cases and All Cases filter view.



If a column is moved to the Excluded section, it will automatically disappear from the Default Filtering section.

You can select any required value for the field from the drop-down list. You can also start typing in the field and then select any of the results that meet your criteria, as shown in the images below.

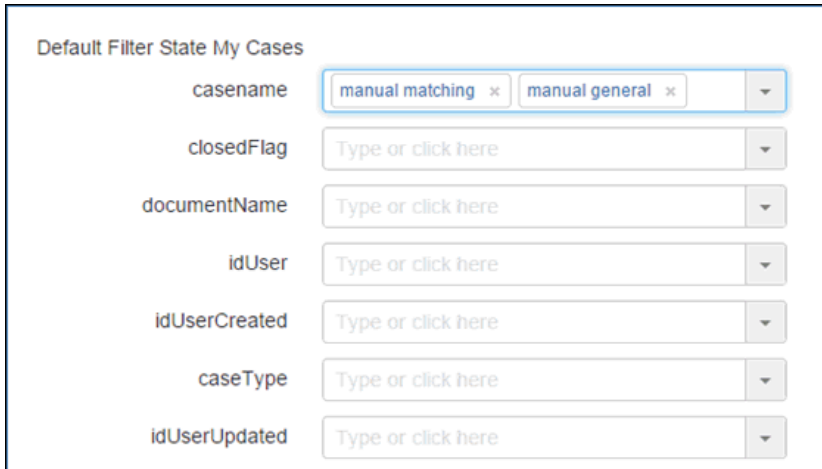
Default Filter State My Cases

casename	<input type="text" value="gene"/>
closedFlag	<input type="text" value="manual general"/>
documentName	<input type="text" value="Type or click here"/>
idUser	<input type="text" value="Type or click here"/>
idUserCreated	<input type="text" value="Type or click here"/>
caseType	<input type="text" value="Type or click here"/>
idUserUpdated	<input type="text" value="Type or click here"/>

Default Filter State My Cases

casename	<input type="text"/>
closedFlag	<input type="text" value="manual cleansing"/>
documentName	<input type="text" value="manual matching"/>
idUser	<input type="text" value="manual general"/>
idUserCreated	<input type="text" value="Type or click here"/>
caseType	<input type="text" value="Type or click here"/>
idUserUpdated	<input type="text" value="Type or click here"/>

More than one value can be selected per field if needed:



Default Filter State My Cases

casename	manual matching manual general ▼
closedFlag	Type or click here ▼
documentName	Type or click here ▼
idUser	Type or click here ▼
idUserCreated	Type or click here ▼
caseType	Type or click here ▼
idUserUpdated	Type or click here ▼

After the required values are set, click *Update* to apply the changes.

Switching ON/OFF of Multiselect Drop-down List on My Cases/All Cases Tabs

To enable fields with multiselect drop-down lists on the Filtering Panel Issue search page, you must create the following options:

- ☐ SwitcherValuesStateAllCases

❏ SwitcherValuesStateMyCases

[Options List](#) [+ New Option](#) [Edit Option](#) [Delete](#)

Title *

SwitcherValuesStateMyCases

Name *

SwitcherValuesStateMyCases

Description

adds possibility using of multisele

Type *

String

Default Value

Path Type *

view

Path Name

myCasesFilterView

Update

Delete

Reset

You must also create the same options in the All Cases tab.

When the options are created, they will appear in the list of options, as shown in the following image:

Sources	Views	Options	Tables	Table Order	Settings	Exceptions
<div>Options List + New Option</div> <div>Help</div>						
Title	Name	Description	Type	Default Value	Path Type	Path Name
Record Name	tableRecordName	Name for single table record	String	Record	table	
Info Tab Indicator	isInfoTab	Indicates whether a table is an information kind of tab	Boolean	false	table	
Is Logged	IsLogged	Log events from this table	Boolean	true	table	
DefaultFilterStateMyCases	DefaultFilterStateMyCases	DefaultFilterStateMyCases	String		view	myCasesFilterView
DefaultFilterStateAllCases	DefaultFilterStateAllCases	DefaultFilterStateAllCases	String		view	allCasesFilterView
SwitcherValuesStateAllCases	SwitcherValuesStateAllCases	adds possibility using of multiselect switchers for configuring of filtering items on All Cases	String		view	allCasesFilterView
SwitcherValuesStateMyCases	SwitcherValuesStateMyCases	adds possibility using of multiselect switchers for configuring of filtering items on My cases	String		view	myCasesFilterView

After the options have been added, switch the WF Cases or WF Tickets to either *ON* or *OFF* for each multiselect drop-down list option. Columns that are in the Included section of the My cases or All cases filter views of the WF Cases table will automatically appear in the Default Filtering section along with the multiselect switches, as shown in the following image:

The screenshot displays a configuration interface for filter views. At the top, there are tabs for 'Case Properties View', 'Advanced Search View', 'Quick Details View', 'My Cases Filter View', and 'All Cases Filter View'. Below the tabs, there are sections for 'Included' and 'Excluded' columns. The 'Included' section lists columns: closedFlag, documentName, id, idUserCreated, idUserUpdated, idUser, and casename. A red arrow points from this section to the 'DefaultFilterStateMyCases' section below. The 'DefaultFilterStateMyCases' section shows these columns with multiselect dropdowns. To the right, the 'SwitcherValuesStateMyCases' section shows toggle switches for each column, all set to 'ON'.

The Default setting of the multiselect switch is set to *OFF*, and the UI of the fields are displayed with check boxes. If a column is moved to the Excluded section, then it will automatically disappear from the Default Filtering section.

The Multiselect switches appear only for the WF Tickets table and display the appropriate views, as shown in the following image.

My Cases Filter View X All Cases Filter View X Ticket Issues Grid View X + Add view v

Included:

- idUserAssigned x
- idUserCreated x
- id x
- idUserUpdated x
- reasonCode x
- idTicketParent x
- ticketType x

Excluded:

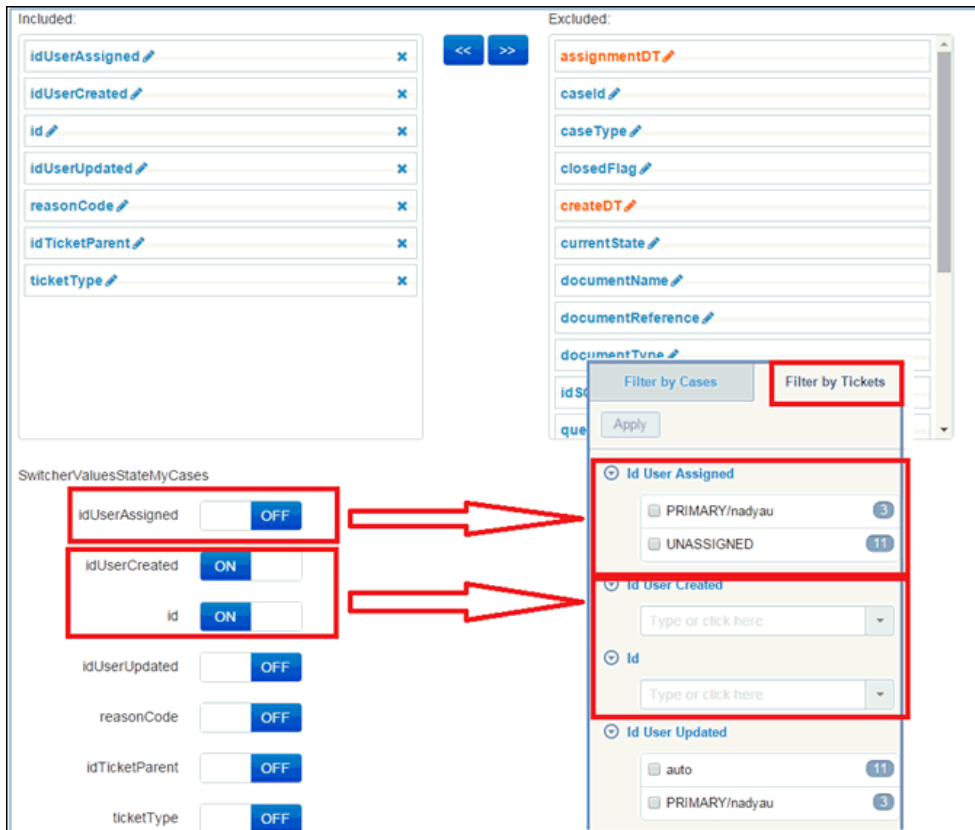
- documentReference
- documentType
- id SCXML
- queueName
- recordStatus
- refTargetName
- refTargetType
- updateDT
- viewedFlag
- ticketSeverity
- reasonDesc

SwitcherValuesStateMyCases

- idUserAssigned OFF
- idUserCreated OFF
- id OFF
- idUserUpdated OFF
- reasonCode OFF
- idTicketParent OFF
- ticketType OFF

After the required values are set, click *Update* to apply the changes.

The Filtering Panel on the Issues Search page reflects the preconfigured settings on the appropriate view of the Administration page, as shown in the following image.



Override Matching Page

In this section:

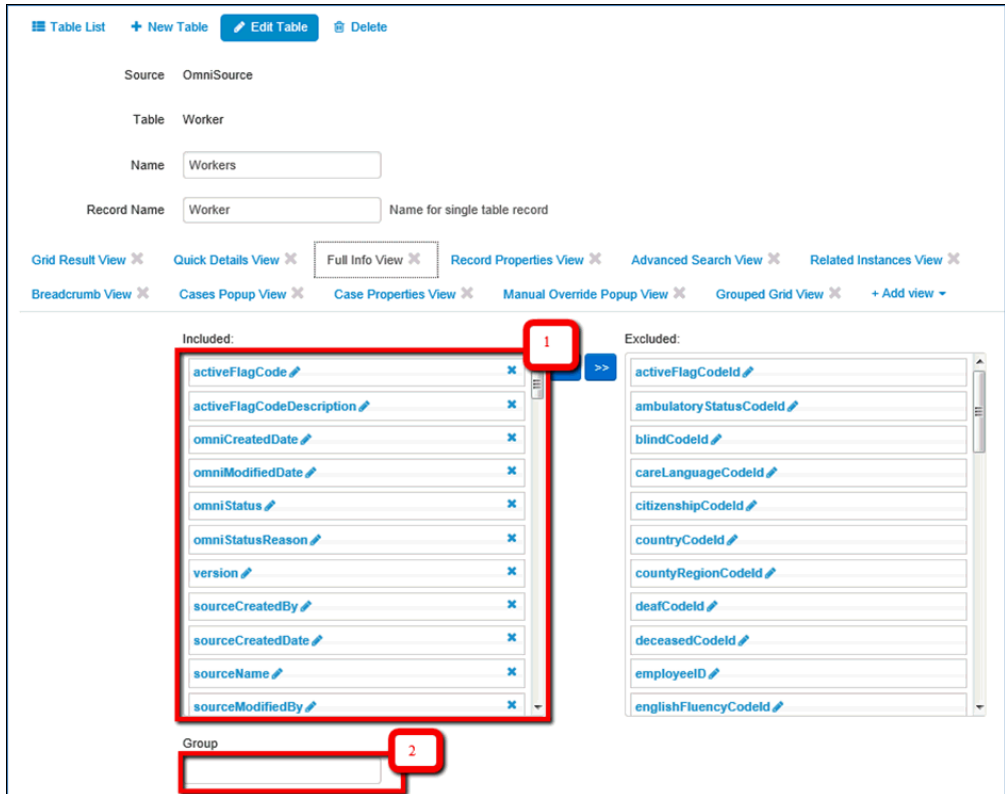
Instance Details Panel
Case Properties Panel

The Administration panel is available for users with the System Administrator role.

Instance Details Panel

To configure the Instance Details panel, click the Tables tab and select an Instance table (for example, Provider, Worker, and so on).

The table consists of many views. Click *Full Info View*, as shown in the following image.



To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

Click the X icon if you wish to exclude a column from the view (1).

If you wish to separate the columns into Groups, add the appropriate group to the Included section (2).

Case Properties Panel

You can configure the Case Properties panel in the Override Matching page. The WF Cases table can be found in the list of tables, and the view that needs to be configured is the Case Properties View.

Note: Configuring the Case Properties View affects all Remediation case pages, including: Override matching, manual cleansing, and General Issue cases.

The screenshot shows the 'Case Properties View' configuration interface. At the top, there are tabs for 'Table List', 'New Table', 'Edit Table', and 'Delete'. Below these, the 'Source' is set to 'OmniSource' and the 'Table' is 'WFCase'. The 'Name' field contains 'WF Cases' and the 'Record Name' field contains 'WF Case'. A row of view tabs is visible: 'Grid Result View', 'Quick Details View', 'Full Info View', 'Record Properties View', 'Advanced Search View', and 'Frequent Search View'. Below these, there are more view tabs: 'Related Instances View', 'Breadcrumb View', 'Cases Popup View', and 'Case Properties View' (which is selected). The main area is divided into 'Included:' and 'Excluded:' sections. The 'Included:' section contains a list of columns: 'id', 'currentState', 'idUser', 'idUserCreated', 'caseType', 'casename', 'createDT', and 'updateDT'. Each column has an 'X' icon to its right. A red box labeled '1' highlights the 'X' icon next to the 'id' column. The 'Excluded:' section contains a list of columns: 'assignmentDT', 'closedFlag', 'documentName', 'documentReference', 'fullName', 'idUserUpdated', 'instanceCount', 'queueName', 'recordStatus', 'sourceName', and 'ssn'. At the bottom, there is a 'Group' input field with a red box labeled '2' highlighting it.

To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

Click the X icon if you wish to exclude a column from the view (1).

If you wish to separate the columns into Groups, add the appropriate group to the Included section (2).

Note: For this view, the names of groups will not be displayed. A horizontal line will appear instead.

Manual Cleansing Page

In this section:

Workspace Panel

Case Properties Panel

The Administration panel is available for users with the System Administrator role.

Workspace Panel

To configure the Workspace panel, click the Tables tab and select an Instance table (for example, Provider or Worker).

The table consists of many views. Click *Full Info View*, as shown in the following image.

The screenshot shows the 'Manual Cleansing Page' for the 'Worker' table. The 'Full Info View' is selected. The 'Included' section contains the following fields:

- activeFlagCode
- activeFlagCodeDescription
- omniCreatedDate
- omniModifiedDate
- omniStatus
- omniStatusReason
- version
- sourceCreatedBy
- sourceCreatedDate
- sourceName
- sourceModifiedBy

The 'Excluded' section contains the following fields:

- activeFlagCodeId
- ambulatoryStatusCodeId
- blindCodeId
- careLanguageCodeId
- citizenshipCodeId
- countryCodeId
- countyRegionCodeId
- deafCodeId
- deceasedCodeId
- employeeID
- englishFluencyCodeId

A red box labeled '1' highlights the 'Full Info View' tab, and another red box labeled '2' highlights the 'Group' input field.

To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

Click the X icon if you wish to exclude a column from the view (1).

If you wish to separate the columns into Groups, add the appropriate group to the Included section (2).

Ability to Allow/Prohibit Editing for Fields

To configure the ability to edit fields in the workspace panel, edit the nested columns (for example, display name, sortable, or filterable). This can be done by clicking the pencil (edit) icon for the corresponding columns in the Full Info View of the selected table and updating its parameters accordingly.

The screenshot shows the 'Edit Column' configuration interface. At the top, there are tabs: Sources, Views, Options, Tables, Table Sets, Settings, and Exceptions. Below the tabs, there are three buttons: '+ New Column', 'Edit Column' (highlighted with a pencil icon), and 'Delete'. The configuration form includes the following fields:

- Name: activeFlagCode
- Description: (with an 'X' icon to the right)
- Title: Active Flag Code (with an 'X' icon to the right)
- Table *: Workers
- Type: String
- View: Full Info View
- Treat As: text (dropdown menu with an 'X' icon to the right)
- Width:
- Alignment: left (dropdown menu)
- Can Sort: ON (toggle switch)
- Can Filter: ON (toggle switch)
- Can Edit: OFF (toggle switch, highlighted with a red rectangle)
- Is Visible: ON (toggle switch)

At the bottom of the form, there are three buttons: Update, Delete, and Reset.

If a field needs to be disabled for editing, select the *OFF* option. Otherwise, select *ON* if there are no changes.

Case Properties Panel

You can configure the Case Properties panel in the Manual Cleansing page. The WF Cases table can be found in the list of tables, and the view that needs to be configured is the Case Properties View.

Note: Configuring this view affects all Remediation case pages, including: Override matching, manual cleansing, and General Issue cases.

The screenshot displays the 'Case Properties View' configuration window. At the top, there are tabs for 'Table List', 'New Table', 'Edit Table', and 'Delete'. Below these, the 'Source' is set to 'OmniSource', the 'Table' is 'WfCase', and the 'Name' is 'Wf Cases'. The 'Record Name' is 'Wf Case'. A row of view tabs includes 'Grid Result View', 'Quick Details View', 'Full Info View', 'Record Properties View', 'Advanced Search View', 'Frequent Search View', 'Related Instances View', 'Breadcrumb View', 'Cases Popup View', and 'Case Properties View' (which is selected). Below the tabs, there are two main sections: 'Included:' and 'Excluded:'. The 'Included:' section contains a list of fields: 'id', 'currentState', 'idUser', 'idUserCreated', 'caseType', 'casename', 'createDT', and 'updateDT'. Each field has an 'X' icon to its right. A red box labeled '1' highlights the 'X' icon next to the 'id' field. The 'Excluded:' section contains a list of fields: 'assignmentDT', 'closedFlag', 'documentName', 'documentReference', 'fullName', 'idUserUpdated', 'instanceCount', 'queueName', 'recordStatus', 'sourceName', and 'ssn'. At the bottom, there is a 'Group' input field with a red box labeled '2' highlighting it.

To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

Click the X icon if you wish to exclude a column from the view (1).

If you wish to separate the columns into Groups, add the appropriate group to the Included section (2).

Note: For this view, the names of groups will not be displayed. A horizontal line will appear instead.

General Issue Page

In this section:

Workspace Panel

Case Properties Panel

The Administration panel is available for users with the System Administrator role.

Workspace Panel

To configure the Workspace panel for the General Issue of the Instance record, click the Tables tab and select an Instance table (for example, Provider or Worker).

The table consists of many views. Click *Full Info View*, as shown in the following image.

The screenshot displays the 'Full Info View' configuration page for the 'Worker' table. At the top, there are tabs for 'Table List', 'New Table', 'Edit Table', and 'Delete'. Below these, the 'Source' is set to 'OmniSource', the 'Table' is 'Worker', and the 'Name' is 'Workers'. The 'Record Name' is 'Worker', with a note 'Name for single table record'. A row of view tabs includes 'Grid Result View', 'Quick Details View', 'Full Info View' (which is selected), 'Record Properties View', 'Advanced Search View', and 'Related Instances View'. Below the tabs, there are more view options: 'Breadcrumb View', 'Cases Popup View', 'Case Properties View', 'Manual Override Popup View', 'Grouped Grid View', and '+ Add view'. The main area is divided into 'Included:' and 'Excluded:' sections. The 'Included:' section contains a list of fields: 'activeFlagCode', 'activeFlagCodeDescription', 'omniCreatedDate', 'omniModifiedDate', 'omniStatus', 'omniStatusReason', 'version', 'sourceCreatedBy', 'sourceCreatedDate', 'sourceName', and 'sourceModifiedBy'. Each field has a blue pencil icon and an 'X' icon. A red box labeled '1' highlights this list. The 'Excluded:' section contains a list of fields: 'activeFlagCodeId', 'ambulatoryStatusCodeId', 'blindCodeId', 'careLanguageCodeId', 'citizenshipCodeId', 'countryCodeId', 'countyRegionCodeId', 'deafCodeId', 'deceasedCodeId', 'employeeID', and 'englishFluencyCodeId'. Each field has a blue pencil icon. A red box labeled '2' highlights the 'Group' dropdown menu at the bottom left.

To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

Click the X icon if you wish to exclude a column from the view (1).

If you wish to separate the columns into Groups, add the appropriate group to the Included section (2).

Note: When the Workspace panel of the General Issue page for the Golden record needs to be configured, follow the same steps mentioned above. However, the Master table must be edited (for example, Provider Masters or Patient Masters).

Case Properties Panel

You can also configure the Case Properties panel in the General Issue page. The WF Cases table can be found in the list of tables, and the view that needs to be configured is the Case Properties View.

Note: Configuring this view affects all Remediation case pages, including: Override matching, manual cleansing, and General Issue cases.

Table List + New Table Edit Table Delete

Source: OmniSource

Table: WfCase

Name: Wf Cases

Record Name: Wf Case Name for single table record

Grid Result View Quick Details View Full Info View Record Properties View Advanced Search View Frequent Search View

Related Instances View Breadcrumb View Cases Popup View Case Properties View + Add view

Included:

- id
- currentState
- idUser
- idUserCreated
- caseType
- casename
- createDT
- updateDT

Excluded:

- assignmentDT
- closedFlag
- documentName
- documentReference
- fullName
- idUserUpdated
- instanceCount
- queueName
- recordStatus
- sourceName
- ssn

Group

To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

Click the X icon if you wish to exclude a column from the view (1).

If you wish to separate the columns into Groups, add the appropriate group to the Included section (2).

Note: For this view, the names of groups will not be displayed. A horizontal line will appear instead.

Issues Pop Up

The Administration panel is available for users with the System Administrator role.

To configure the Issues pop up, click the Tables tab and select an Instance table (for example, Provider or Worker) from the WF Case list of tables.

The consists of many views. Click *Quick Details View*.

To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

Click the X icon if you wish to exclude a column from the view (1).

If you wish to separate the columns into Groups, add the appropriate group to the Included section (2).

Domain Grid Configuration

To configure sections and their attributes, include or exclude the necessary columns in the Full Info View of the appropriate table.

The following image shows the steps required to configure the domain grid.

1 Tables Views Options Tables Table Order Settings Exceptions

Table List + New Table Help

Name	Source	Entity Type
Patient Masters	OmniSource	PatientMaster
Patients	OmniSource	Patient
Person Address Masters	OmniSource	PersonAddressMaster
Person Name Masters	OmniSource	PersonNameMaster
Person Addresses	OmniSource	PersonAddress
Person Names	OmniSource	PersonName
Providers	OmniSource	Provider
Provider Masters	OmniSource	ProviderMaster
Person Identifier Masters	OmniSource	PersonIdentifierMaster
Person Contact Method Masters	OmniSource	PersonContactMethodMaster

1 2 3 4 5 6 7 8 9 10 Next

2 Tables Views Options Tables Table Order Settings Exceptions

Table List + New Table Edit Table Delete Help

UEMID	First Name	Middle Name	Last Name	Date Of Birth	Address	City	State/Province	Postal Code	Omni Modified Date
10	Elaine	Sophia	Biers	1954-05-10T00:00:00+02:00	119 Boot Hills Road	Portland	Oregon	96553	2015-04-22T17:30:26.07+03:00
13	Emily	Sophia	Biers	1977-07-22T00:00:00+02:00	2456 BROOKWOOD HILLS RD	Athens	Illinois	62613	2015-04-22T17:33:09.633+03:00
15	Gianni	I	Kidd	1985-03-22T00:00:00+02:00	611 E 6TH ST	AUSTIN	Texas	78701-3715	2015-04-22T17:30:47.86+03:00
17	Jane	E	Bruno	1965-02-21T00:00:00+02:00	4000 East Ave	Livonia	New York	14488	2015-04-30T12:32:56.393+03:00
21	Justice	F	Murillo	1988-07-04T00:00:00+03:00	1467 S WESTGATE	LOS ANGELES	California	90025-2209	2015-04-22T17:30:48.113+03:00

3 Breadcrumb View X Related Instances View X Frequent Search View X Advanced Search View X Record Properties View X Full Info View X Quick Details View X Grid Result View X + Add view

Included:

- Demographics X
- firstName X
- middleName X
- lastName X
- fullName X
- suffix X
- prefix X
- title X
- dateOfBirth X
- ssn X
- addressLine1 X

Excluded:

- adoptedCodeId X
- ambulatoryStatusCodeId X
- badDebtCodeId X
- blindCodeId X
- careLanguageCodeId X
- citizenshipCodeId X
- countryCodeId X
- countyRegionCodeId X
- deafCodeId X
- deceasedCodeId X
- disabilityCodeId X

1. Find the required table in the list of tables.
2. Edit the table.
3. Click *Full Info View*

To divide the fields on the page into sections, edit the Group field and press *Enter* (Full Info view). The header of the section will be added into the list of included columns.

Drag the header and drop it above the columns that are required for the section.

The screenshot displays the 'Full Info View' configuration window. At the top, there are tabs for different views: Breadcrumb View, Related Instances View, Frequent Search View, Advanced Search View, Record Properties View, and Full Info View (which is selected). Below the tabs are options for Quick Details View, Grid Result View, and an '+ Add view' button.

The main area is divided into two columns: 'Included:' and 'Excluded:'. The 'Included:' column contains a list of fields from the 'Demographics' table, including firstName, middleName, lastName, fullName, suffix, prefix, title, dateOfBirth, ssn, and addressLine1. The 'Excluded:' column contains a list of codes, including adoptedCodeId, ambulatoryStatusCodeId, badDebtCodeId, blindCodeId, careLanguageCodeId, citizenshipCodeId, countryCodeId, countyRegionCodeId, deafCodeId, deceasedCodeId, and disabilityCodeId.

Below the 'Included:' list, there is a 'Group' section with a text input field containing 'New Group'. A red box highlights this input field. A large red arrow points from this input field down to the 'Included:' list in the lower part of the window.

In the lower part of the window, the 'Included:' list now includes the 'New Group' entry, which is also highlighted with a red box. The 'Excluded:' list remains the same. Below the 'Included:' list, there is another 'Group' section with a text input field containing 'Add Group'.

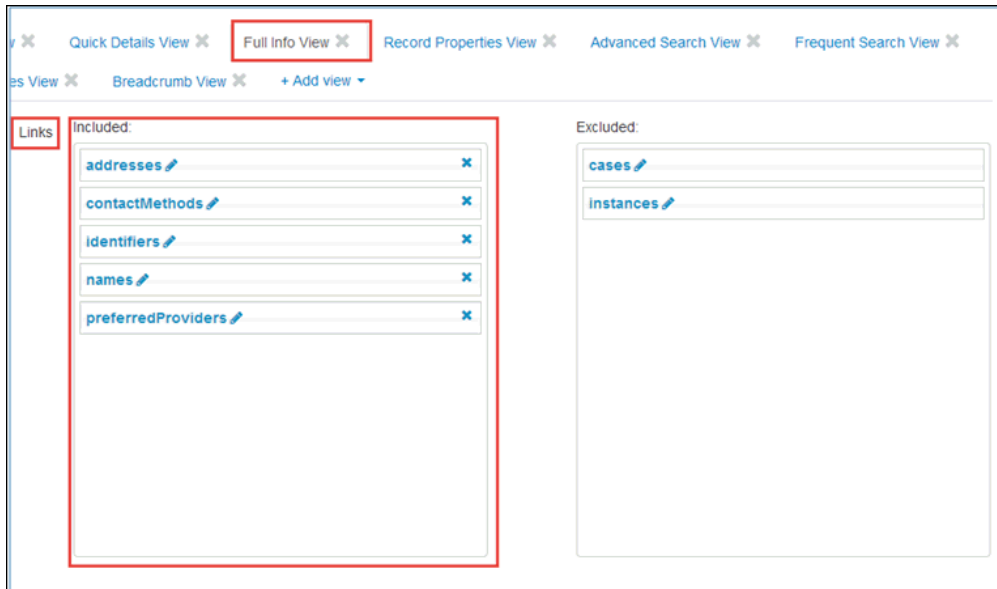
Breadcrumbs Configuration

Breadcrumbs are configured through the Breadcrumb View in the WF Case table, as shown in the following image.

The screenshot displays the configuration interface for the 'WF Case' table. At the top, a breadcrumb navigation bar shows 'Home' and a long ID string. Below this, a red arrow points to the 'Tables' tab in the navigation menu. The main configuration area includes fields for 'Source' (OmniSource) and 'Table' (WFCase). The 'Name' field is set to 'WF Cases' and is highlighted with a red box. Other fields include 'Record Name' (Wf Case), 'Info Tab Indicator' (OFF), 'Is Logged' (ON), and 'Use multiselect for default values' (ON). Below these, there are tabs for 'Case Properties View', 'Breadcrumb View' (highlighted with a red box), 'Advanced Search View', and 'Case Issues Grid View'. At the bottom, there is a section for 'Included' fields, which lists 'id' and 'createDT' (highlighted with a red box), and an 'Excluded' section on the right.

Sub-domains Configuration

To configure subdomains in the Add New Document page, edit the Document table and include or exclude the required links in the Full Info View, as shown in the following image.



Reader Comments

In an ongoing effort to produce effective documentation, the Technical Content Management staff at Information Builders welcomes any opinion you can offer regarding this manual.

Please share your suggestions for improving this publication and alert us to corrections. Identify specific pages where applicable. You can contact us through the following methods:

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