

iWay

Omni-Insurance Omni Governance
Console Administration Guide

Version 3.12

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Preface

This documentation describes how to perform administration tasks for Omni Governance Console (OGC), which 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 Administration Console	Introduces the Administration console, which is a component of the Omni Governance Console (OGC).
2	Configuring Application Components	Describes how to configure Omni Governance Console (OGC) application components using the Administration console.
A	Enhanced Access Security: Column-Based and Row-Based	Describes how to configure column-based access security and row-based access security in the Omni Governance Console (OGC).
B	Configuring Single Sign-On	Describes how to configure Single Sign-On (SSO) for Omni Governance Console (OGC).
C	Using MData, Synch, and WS02 Administration	Describes the WS02/MData Synchronization (Mdata-Synch) feature of reducing the configuration work of the administrator when a new subject arrives into the Omni Server model and database, and when data structures are altered (for example, a type or name of a column has been changed).
D	Configuring Omni Governance Console Roles From LDAP (Active Directory)	Describes how to configure a WS02 based LDAP connection and User Store which will eliminate the redundant data entry, and allow the Subject per Userid Authorizations to be obtained from the enterprise LDAP Server (Active Directory).

Documentation Conventions

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

Convention	Description
THIS TYPEFACE or this typeface	Denotes syntax that you must type exactly as shown.
this typeface	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.
<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.

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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 tables list the environment information our consultants require.

Platform	
Operating System	
OS Version	
JVM Vendor	
JVM Version	

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?	

Request/Question	Error/Problem Details or Information
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 message(s).	
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/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
- ☐ Custom functions and agents in use
- ☐ Diagnostic Zip
- ☐ Transaction log

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Thank you, in advance, for your comments.

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Introducing the Administration Console

This chapter introduces the Administration console, which is a component of the Omni Governance Console (OGC).

In this chapter:

- ☐ [Overview](#)
 - ☐ [Prerequisites](#)
 - ☐ [Key Features](#)
 - ☐ [Accessing the Administration Console](#)
 - ☐ [Understanding the Layout and Structure of the Administration Console](#)
-

Overview

Omni Governance Console (OGC) provides an Administration console that you can use to configure OGC.

The Administration console is only available after users log in to OGC. Only users who are first authenticated and authorized with the *System Administrator* role in the WS02 Identity Server user store repository are allowed to access the OGC Administration console.

Prerequisites

Before connecting to the Omni Governance Console (OGC), ensure that the client system supports the prerequisites that are listed in the following table.

Client Component	Version
Operating Systems	<input type="checkbox"/> Windows 2016, Windows 2012, Windows 10

Client Component	Version
Web Browser	<div><input type="checkbox"/> Microsoft Edge</div> <div><input type="checkbox"/> Internet Explorer 11</div> <div><input type="checkbox"/> Mozilla Firefox: Latest available version</div> <div><input type="checkbox"/> Google Chrome: Latest available version</div>

Key Features

- The OGC Administration console provides a web-based interface to view and edit OGC 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 OGC metadata, modifying application options, and display definitions has the *System Administrator* role in the WSO2 Identity Server user store repository.

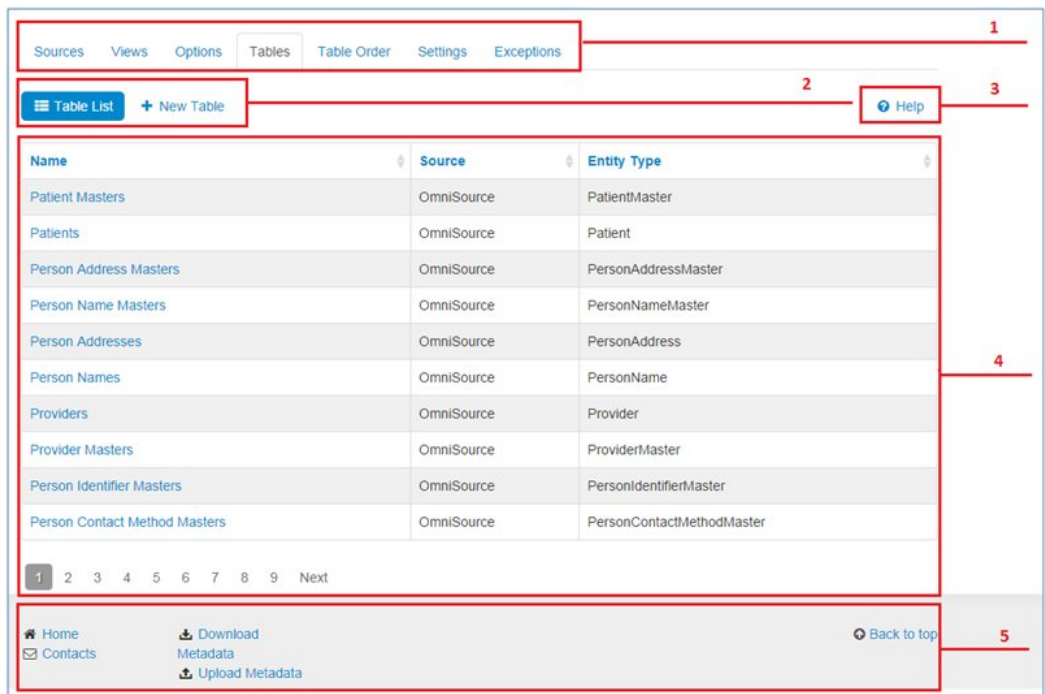
1. Enter the URL in your browser to access OGC. For example:

<https://ogcHostName:8443>

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

Understanding the Layout and Structure of the Administration Console

All pages within the OGC 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.

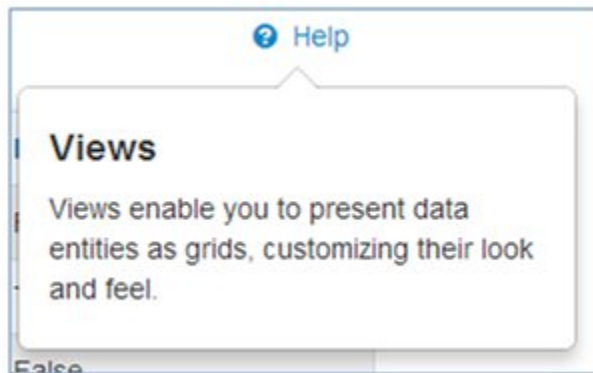
The following image shows the actions menu when the Tables tab selected in the components menu.



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.



Configuring Application Components

This section describes how to configure Omni Governance Console (OGC) application components using the Administration console.

In this chapter:

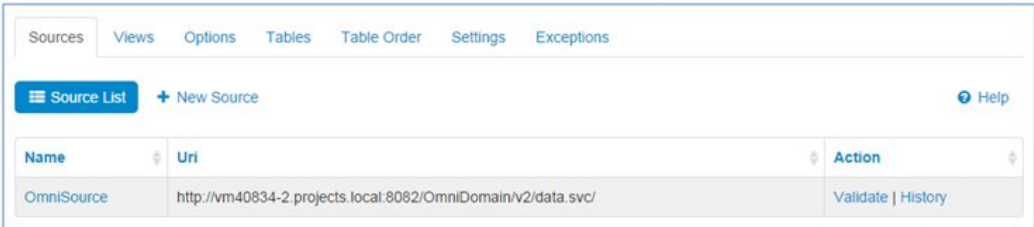
- ☐ [Sources](#)
 - ☐ [Views](#)
 - ☐ [Options](#)
 - ☐ [Tables](#)
 - ☐ [Table Order](#)
 - ☐ [Settings](#)
 - ☐ [Exceptions](#)
 - ☐ [Downloading and Uploading Metadata](#)
 - ☐ [Configuring 360 Viewer](#)
 - ☐ [Configuring Remediation Pages](#)
-

Sources

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

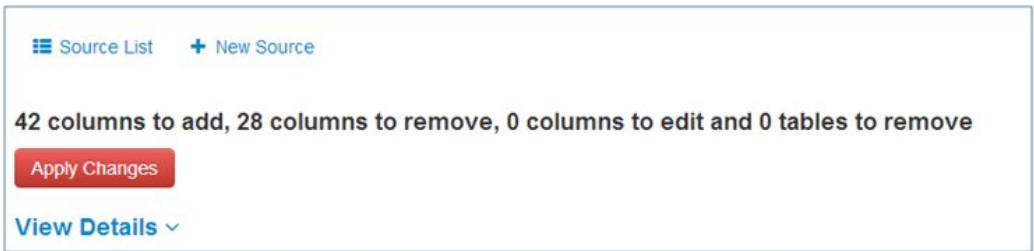
Source List

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.

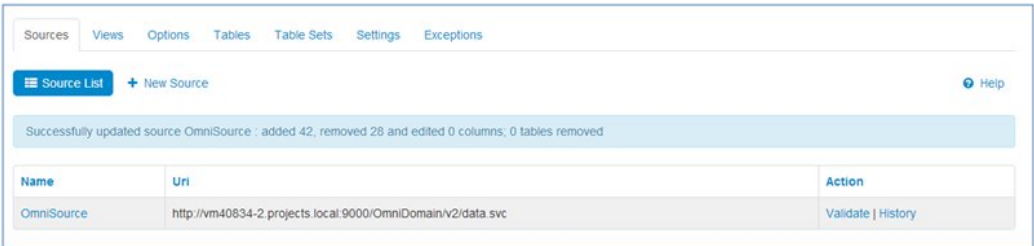


Source Validation

Administrators can validate a source by clicking 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.

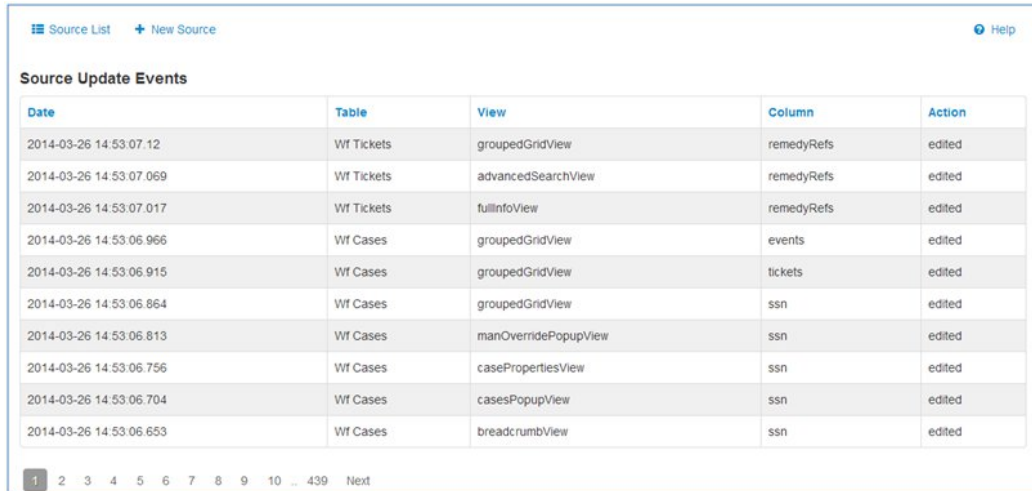


After clicking the *Apply Changes* button, the source will be updated, as shown in the following image.



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 main content is a table with the following data:

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

At the bottom of the table, there is a pagination bar showing '1' selected, followed by numbers 2 through 10, an ellipsis, 439, and a 'Next' link.

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

SourcesViewsOptionsTablesTable OrderSettingsExceptions

Sources ListEdit SourceDeleteHelp

1	Name	OmniSource
2	Uri	http://vm40834-1.projects.local:8082/OmniDomain/v2/data.svc/
3	Tables	<div>Patient Masters Organizational Unit Identifiers Organization Names Organizational Unit Contact Method Masters Provider Assignments Provider License Monitors Facility Relation Masters Facility Location Contact Method Masters Job Masters Provider Interpreter Privileges Facility Location Relation Masters Provider Practice Speciality Masters Facility Address Masters Organization Address Masters Organizations Person Names Facility Identifier Masters Patient Medical Record Number Masters Provider Insurances Organization Identifiers</div>
4	Source configuration	orDelimiter

Editing a Source

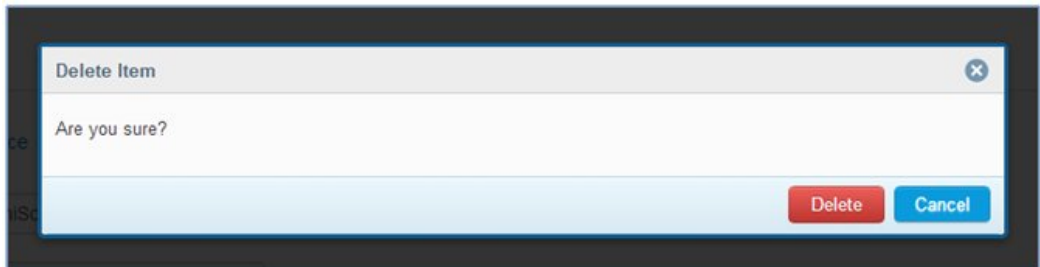
The Edit Source page enables administrators to change source properties. However, some fields such as Uri and Tables cannot be edited. To navigate to this page, administrators should select the source that needs to be changed from the list and then click the *Edit Source* button.

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

- Name:** A text input field containing 'OmniSource'.
- Uri:** A text input field containing 'http://vm40834-2.projects.local:9'.
- Service URL:** A text input field containing 'http://vm40834-2.projects.local:9', with the label 'Workflow endpoint' to its right.
- Tables:** A list of 14 items, each preceded by a bullet point:
 - 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 Addresss
 - Organization Name Masters
 - Facility Location Identifiers
 - Wf Events
 - Include Rules
 - Provider License Monitors

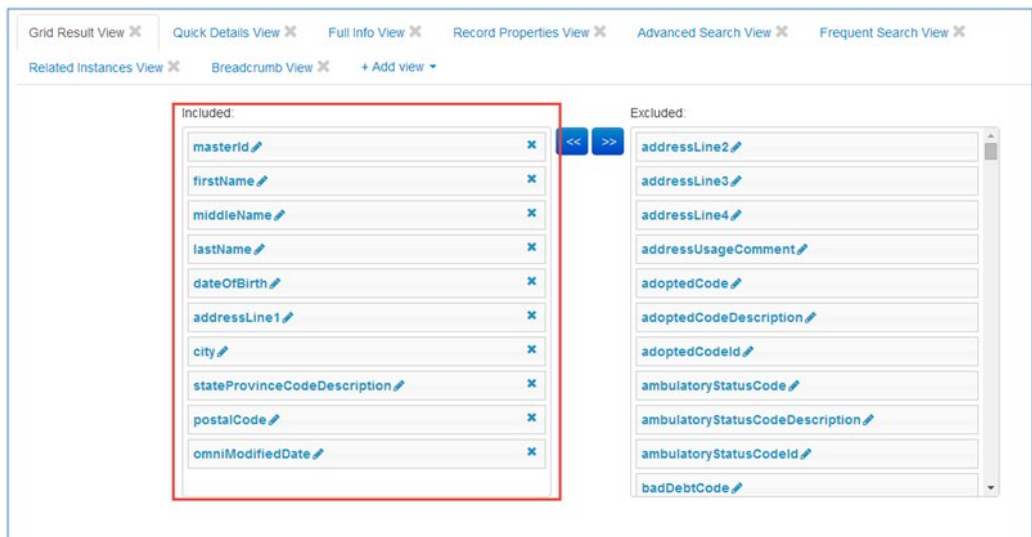
Deleting a Source

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

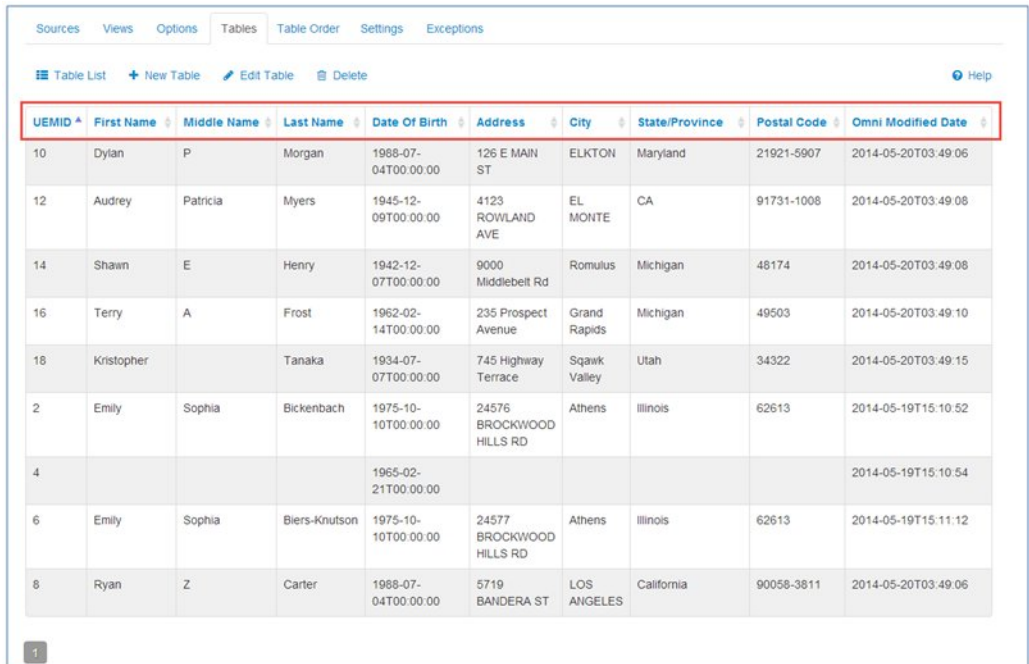


Views

Views are used to select/group columns for display in the main interface of Omni Governance Console (OGC).



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	1988-07-04T00:00:00	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	1988-07-04T00:00:00	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:

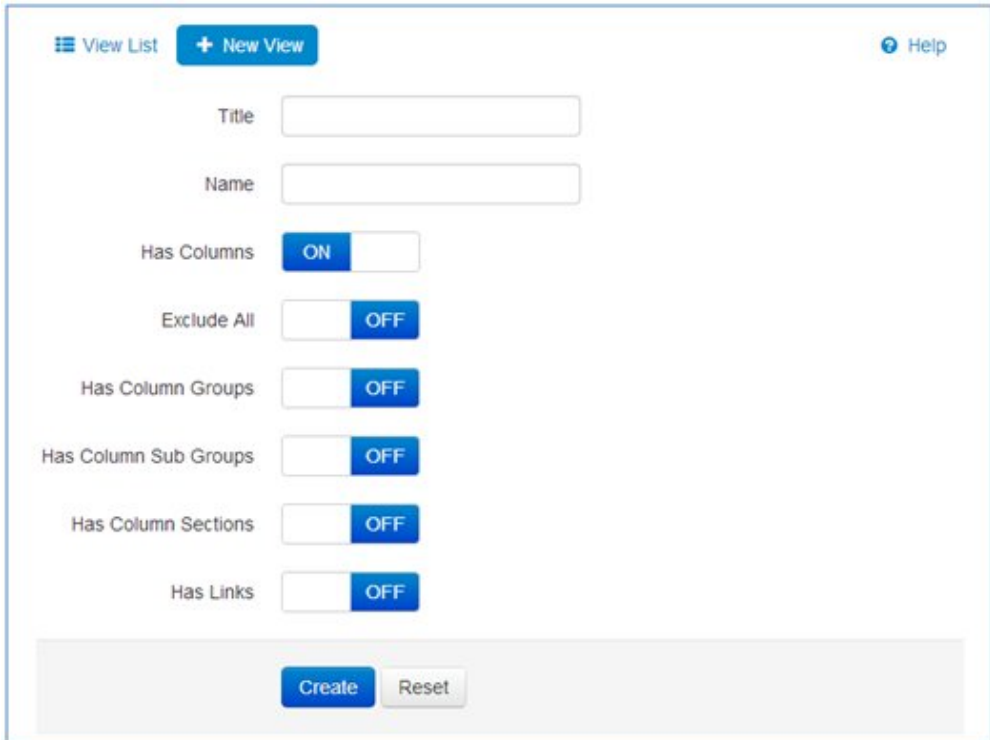
- ☐ View title
- ☐ View name
- ☐ If a view has columns
- ☐ If all columns must be excluded
- ☐ If a view has groups
- ☐ If a view has sub-groups
- ☐ If a view has sections
- ☐ If a view has links

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 interface for creating a new view. At the top left, there is a 'View List' link with a list icon and a '+ New View' button. At the top right, there is a 'Help' link with a question mark icon. Below these are two text input fields labeled 'Title' and 'Name'. Underneath are six toggle switches: 'Has Columns' (ON), 'Exclude All' (OFF), 'Has Column Groups' (OFF), 'Has Column Sub Groups' (OFF), 'Has Column Sections' (OFF), and 'Has Links' (OFF). At the bottom, there is a light gray bar containing a blue 'Create' button and a gray 'Reset' button.

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 shows the 'Edit View' page with the following elements:

- Tabs: Sources, Views, Options, Tables, Table Order, Settings, Exceptions
- Buttons: View List, + New View, Edit View, Delete, Help
- Form Fields:
 - Title: Grid Result View
 - Name: gridResultView
 - Has Columns: ON
 - Exclude All: ON
 - Has Column Groups: OFF
 - Has Column Sub Groups: OFF
 - Has Column Sections: OFF
 - Has Links: OFF
- Bottom Buttons: Update, Delete, Reset

Options

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)

The screenshot shows the 'Option List' page with a table of existing options. The table has two columns: 'Title' and 'Record Name'. The rows are numbered 1 through 7.

Title	Record Name
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.

The screenshot shows the 'New Option' page. It has a header with 'Option List' and a '+ New Option' button. Below the header are input fields for 'Title', 'Name', 'Description', 'Type', and 'Path Type'. At the bottom are 'Create' and 'Reset' buttons.

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.

Option List

+ New Option

Edit Option

Delete

Help

Title

Record Name

Name

tableRecordName

Description

Name for single table record

Type

String

Default Value

Record

Path Type

table

Path Name

Update

Delete

Reset

Note that the Name and Type fields cannot be modified.

Tables

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.

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					

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 displays the 'New Table' configuration page. At the top, there are tabs for Sources, Views, Options, Tables, Table Order, Settings, and Exceptions. Below these, a 'Table List' section contains a '+ New Table' button. The main configuration area is divided into several sections:

- Section 1 (Table properties):** Includes a 'Source' dropdown (OmniSource), a 'Table' dropdown (Column), and a 'Name' text field (Columns).
- Section 2 (Table options):** Includes a 'Record Name' text field (Record) and an 'Info Tab Indicator' toggle (OFF).
- Section 3 (View tabs):** A horizontal 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, and Grouped Grid View. There is also a '+ Add view' button.
- Section 4 (Included columns):** A list box containing 'calcDescription'.
- Section 5 (Include all/Exclude all buttons):** Two buttons labeled '<<' and '>>'.
- Section 6 (Excluded columns):** A list box containing 'calcFormula', 'calculatedColumn', 'dataType', 'displayName', 'foreignKey', 'id', 'longDescr', 'name', 'primaryKey', 'shortDescr', and 'sourceSystem'.

At the bottom of the page, there 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.

The image shows a rectangular box containing two UI elements. The top element is a dropdown menu with the text 'Group' and a small downward-pointing triangle on the right. The bottom element is a button with the text '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.

Search for **Patient Masters** **Provider Masters**

Demographics

Name		?	Mother Maiden Name		2
Middle Name		?	Marital Status		
Citizenship Code			SSN		
Date Of Death		?	Date Of Birth		?
Cause Of Death			Gender		
Deceased Code					

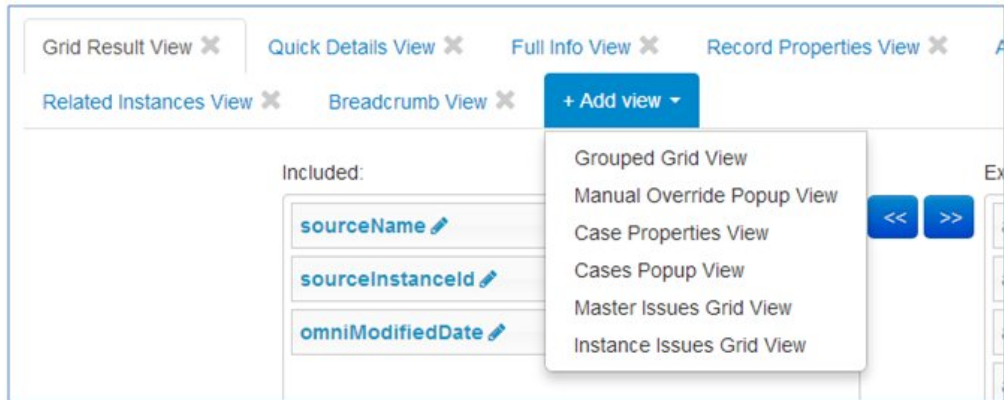
Ethnicity

Search Clear Close

or try search **Addresses** **Names**

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.



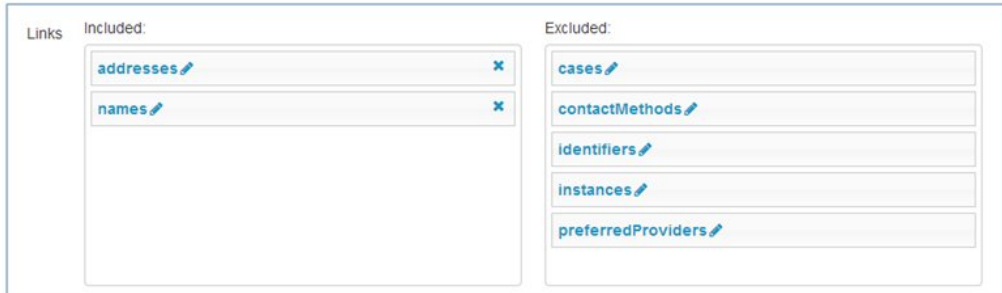
Editing a Table

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 shows the 'Edit Table' page with the following elements:

- Navigation Tabs:** Sources, Views, Options, **Tables**, Table Order, Settings, Exceptions.
- Actions:** Table List, + New Table, **Edit Table** (active), Delete, Help.
- Form Fields:**
 - Source: OmniSource
 - Table: PatientMaster
 - Name: Patient Masters
 - Record Name: Patient (with description: Name for single table record)
 - Info Tab Indicator: OFF (with description: Indicates whether a table is an information kind of tab)
- Views:** 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.
- Field Management:**
 - Included:** masterId, fullName, dateOfBirth, ssn.
 - Excluded:** addressLine1, addressLine2, addressLine3, addressLine4, addressUsageComment, adoptedCode, adoptedCodeDescription, adoptedCodeId, ambulatoryStatusCode, ambulatoryStatusCodeDescription, ambulatoryStatusCodeId.

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

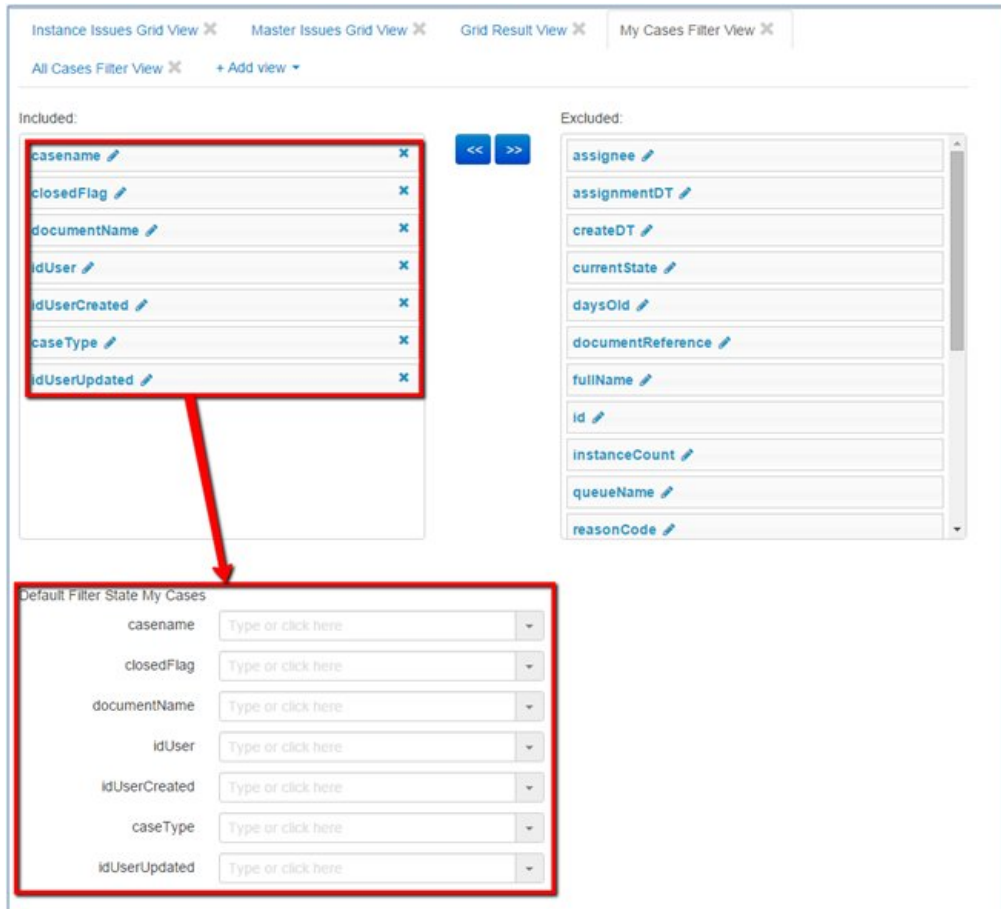


The screenshot shows a configuration interface for 'Links'. It is divided into two main sections: 'Included:' and 'Excluded:'. The 'Included:' section contains two items: 'addresses' and 'names', each with a blue pencil icon for editing and a blue 'x' icon for deletion. The 'Excluded:' section contains five items: 'cases', 'contactMethods', 'identifiers', 'instances', and 'preferredProviders', each with a blue pencil icon for editing. The entire interface is enclosed in a light blue border.

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 the 'Default Filter State My Cases' form. The left screenshot shows the 'casename' dropdown with 'gene' selected and the 'closedFlag' dropdown with 'manual general' selected. The right screenshot shows the 'casename' dropdown with 'manual cleansing' selected and the 'closedFlag' dropdown with 'manual matching' selected. Both screenshots show other fields like 'documentName', 'idUser', 'idUserCreated', 'caseType', and 'idUserUpdated' with 'Type or click here' text.

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' dropdown is highlighted and shows multiple values selected: 'manual matching' and 'manual general'. The other fields are the same as in the previous screenshots.

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 shows the 'Edit Column' form within a software application. The form has a top navigation bar with tabs: Sources, Views, Options, Tables, Table Order, Settings, and Exceptions. Below the tabs, there are three buttons: '+ New Column', 'Edit Column' (highlighted with a pencil icon), and 'Delete'. A 'Help' link is also present. The form contains several fields and controls:

- Name:** masterid (text input, not editable)
- Description:** (text input, not editable)
- Title:** UEMID (text input, not editable)
- Table *:** Patient Masters (hyperlink, not editable)
- Type:** String (text input, not editable)
- View:** Breadcrumb View (hyperlink, not editable)
- Treat As:** text (dropdown menu, not editable)
- Width:** (text input, not editable)
- Alignment:** left (dropdown menu, not editable)
- Can Sort:** ON (toggle switch)
- Can Filter:** ON (toggle switch)
- Can Edit:** ON (toggle switch)
- Is Visible:** ON (toggle switch)
- Is Logged:** OFF (toggle switch)


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

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

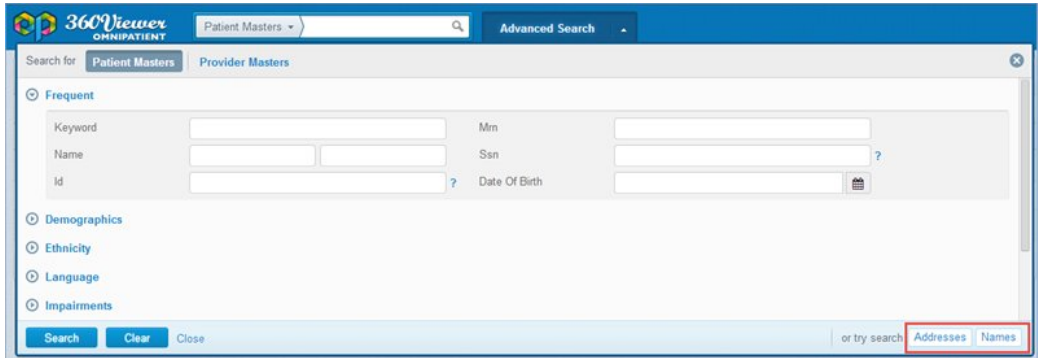
There is an *Update in all views* check box near some fields on the Edit Column page. When selected, the appropriate column will be updated in all views for the corresponding table. For example, if an administrator changes a description in the Patient Masters table with this option selected, then the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



The screenshot shows a form with two input fields. The first field is labeled 'Description' and is empty. To its right is a checkbox that is currently unchecked. The second field is labeled 'Title' and contains the text 'UEMID'. To its right is another unchecked checkbox. A button labeled 'Update in all views' is positioned to the right of the first 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.



The screenshot shows the '360Viewer OMNIPATIENT' Advanced Search dialog. The 'Patient Masters' tab is selected. The 'Frequent' section contains search fields for Keyword, Name, Id, Min, Ssn, and Date Of Birth. The 'Demographics' section is expanded, showing fields for Ethnicity, Language, and Impairments. At the bottom, there are 'Search', 'Clear', and 'Close' buttons. On the right, there is a link to 'or try search' with sub-domain tabs for 'Addresses' and 'Names' highlighted in red.

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

SourcesViewsOptionsTablesTable OrderSettingsExceptions

Link List

+ New Link

Edit Link

Delete

Help

Name

addresses

Description

Title

Addresses

Table *

Providers

View

Full Info View

Treat As

text

Is Visible

ON

Reference Type

Person Addresses

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.

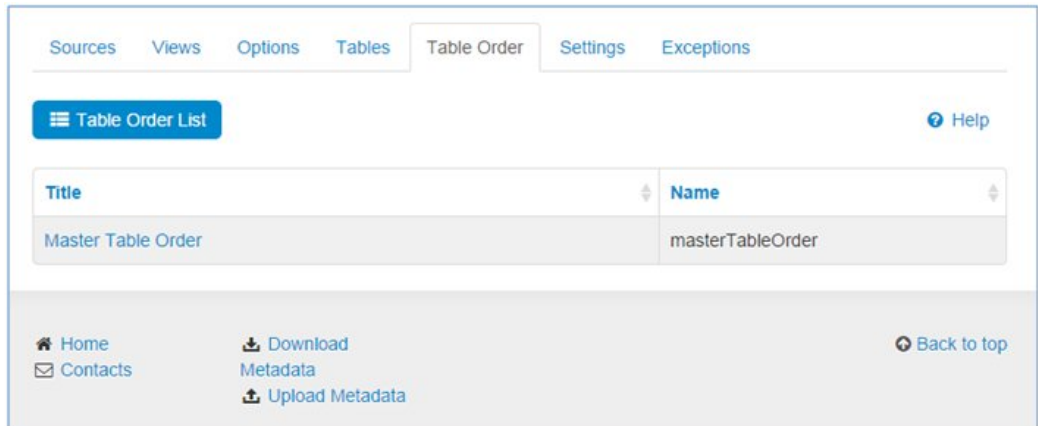
In addition, it is possible to create or delete a current link by clicking the corresponding button.

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.

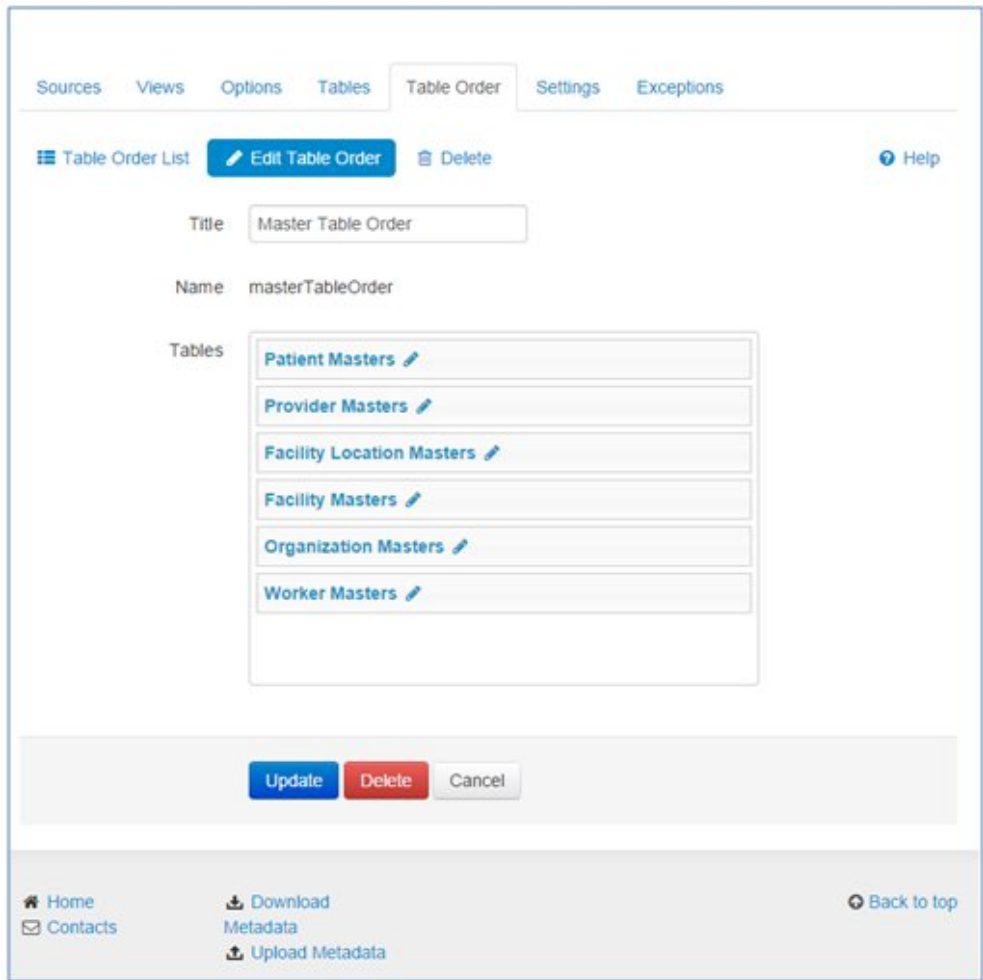
Table Order List

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.



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

Settings

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.

SourcesViewsOptionsTablesTable OrderSettingsExceptions

Settings List

+ New Setting

Help

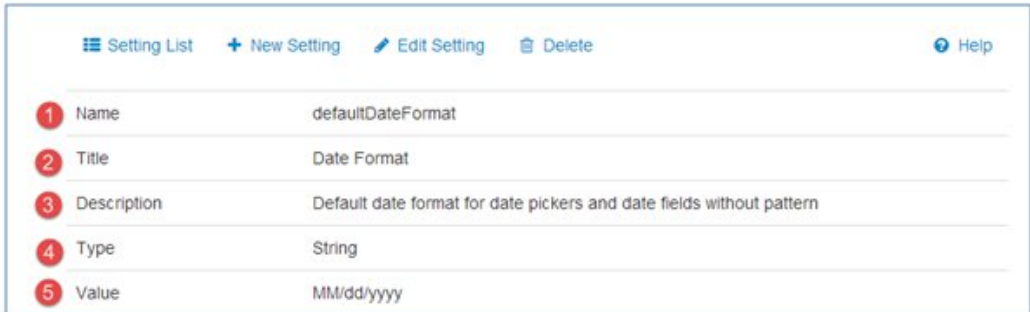
Name	Title	Description	Type	Value
trackJsErrors	Track JavaScript Errors	Track JavaScript Errors	Boolean	true
defaultDateTimeFormat	Date Time Format	Default date time format for that is used for custom date properties that do not belong to any view (e.g. activity dates for cases)	String	yyyy-MM-dd hh:mm:ss 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
issueFiterSectionsCount	Issue Fiter 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

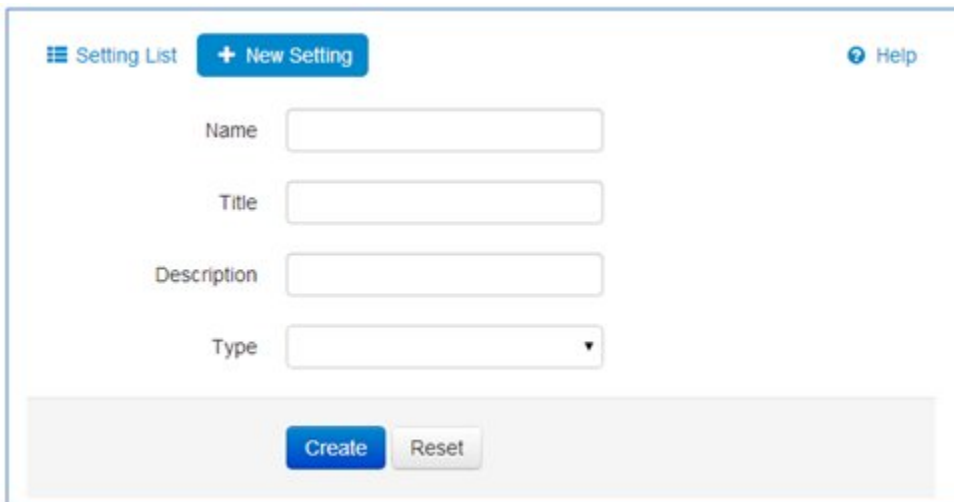
❏ Setting value



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

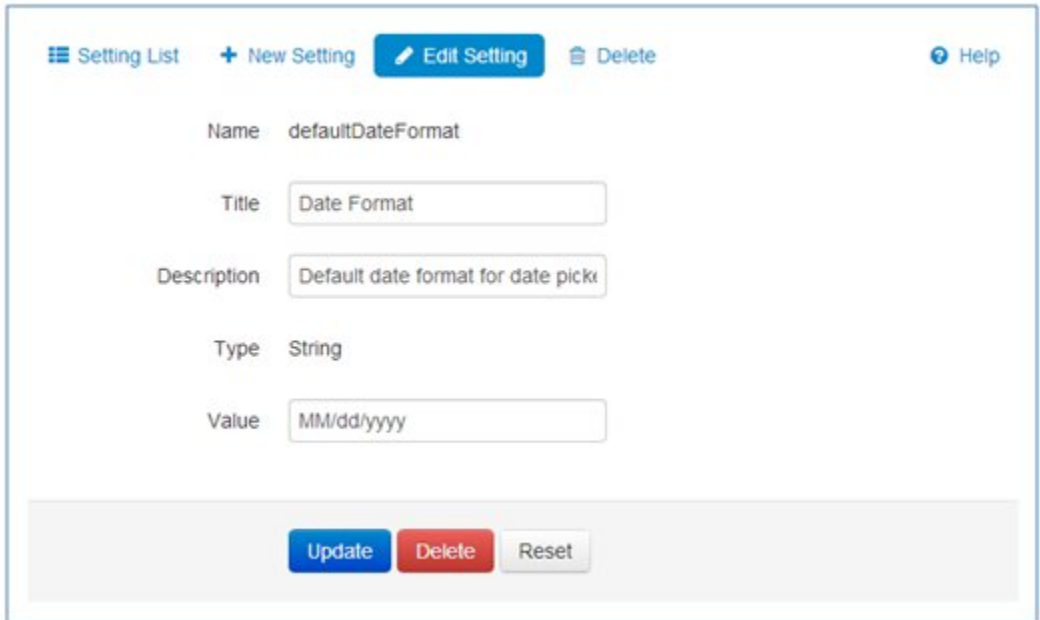
Description

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.



Setting List + New Setting Edit Setting Delete Help

Name defaultDateFormat

Title Date Format

Description Default date format for date pick

Type String

Value MM/dd/yyyy

Update Delete Reset

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

Exceptions

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 Governance Console (OGC) support and developers in the event of an error occurrence.

Id	User	Date	Stack trace
3	projects/wso2sysadmin1	2014-05-20 12:04:33	com.ibm.op.search.SourceResponseException: Response code 404: Not Found at com.ibm.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.ibm.op.config.SourceClientService.\$1.doRequest(SourceClientService.groovy:38) at com.ibm.op.config.SourceClientService.\$1.doGet(SourceClientService.groovy:13) at com.ibm.op.config.SourceService.\$1.getEntityTypes(SourceService.groovy:294) at com.ibm.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)
2	projects/wso2sysadmin1	2014-05-20 12:04:24	com.ibm.op.search.SourceResponseException: Response code 404: Not Found at com.ibm.op.config.SourceClientService...
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

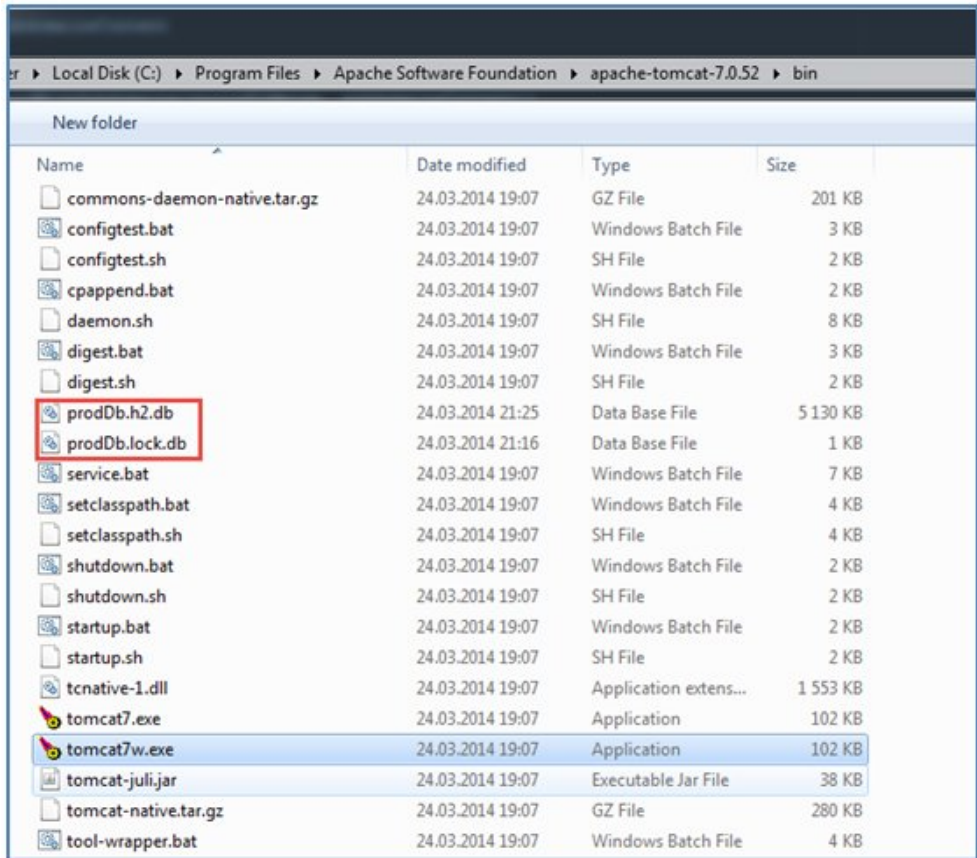
This section describes how to download and upload metadata.

Downloading Metadata

Metadata provides the configuration values for the Omni Governance Console (OGC) 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 OGC 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 OGC 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.

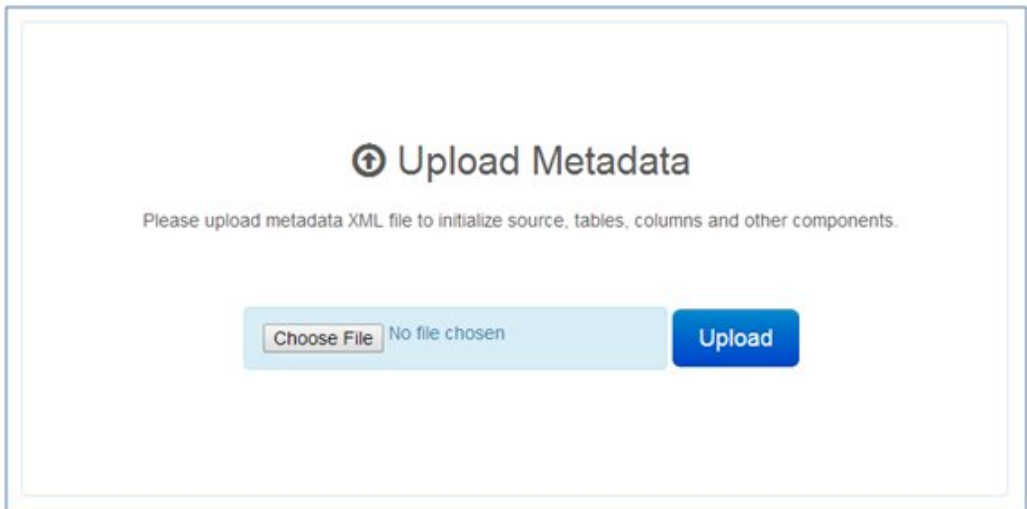
The download link is displayed in the footer of the page, as shown in the following image.




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.

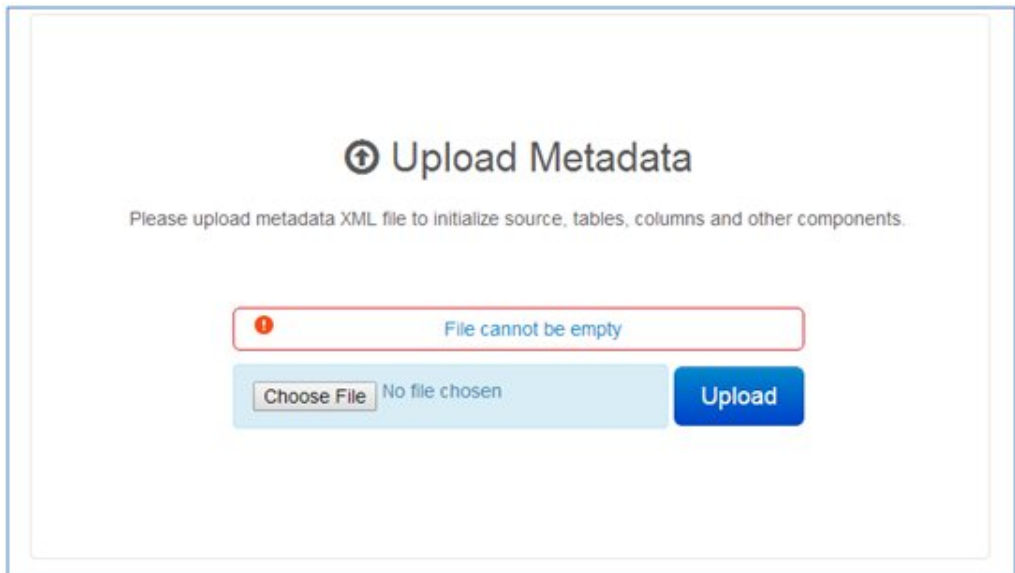


 Upload Metadata

Please upload metadata XML file to initialize source, tables, columns and other components.

No file chosen

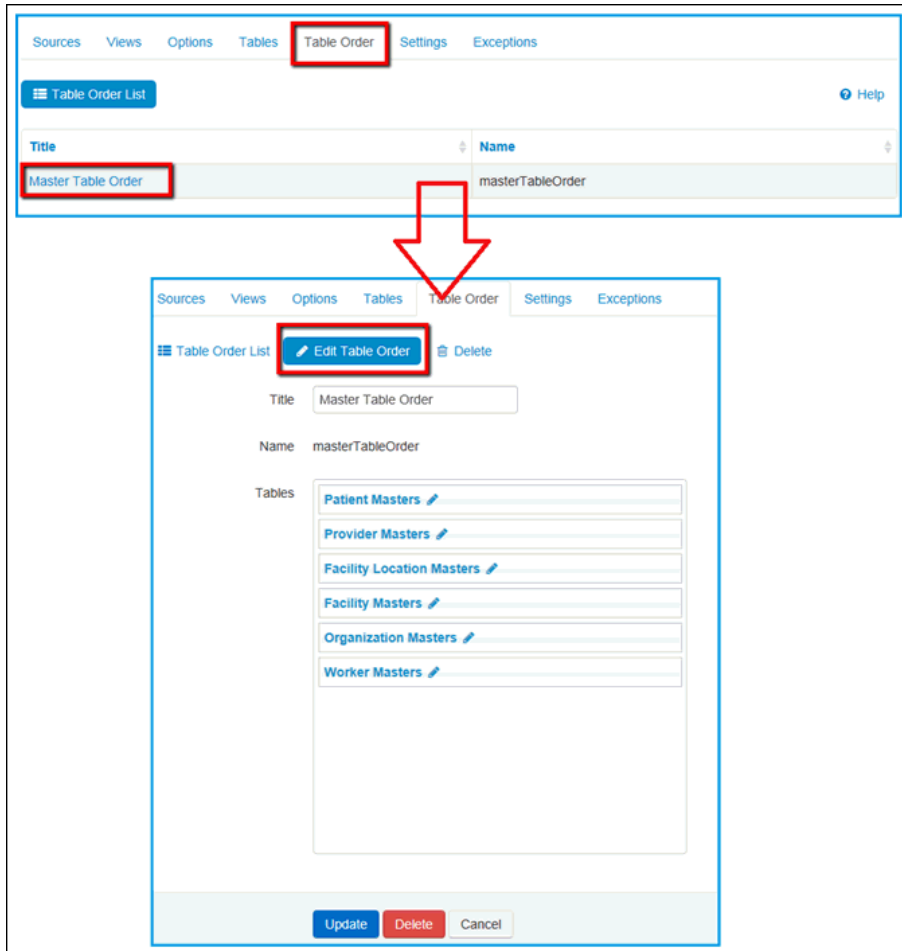
Before uploading, the file is validated to ensure that the format is correct. If the format is incorrect or the file is empty, an error message appears, as shown in the following image.



The screenshot displays a web interface for uploading metadata. At the top, there is a heading "Upload Metadata" with an upward arrow icon. Below the heading, a message states: "Please upload metadata XML file to initialize source, tables, columns and other components." The main area contains a file upload section. It features a red-bordered box with a red error icon and the text "File cannot be empty". Below this, there is a light blue button labeled "Choose File" and a text label "No file chosen". To the right of these is a blue button labeled "Upload".

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.

Configuring 360 Viewer

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.

Table List

+ New Table

Edit Table

Delete

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:

Gender

genderCode

genderCodeDescription

Gender

Marital Status

maritalStatusCode

maritalStatusCodeDescription

Marital Status

Language

languageCode

languageCodeDescription

Excluded:

addressLine1

addressLine2

addressLine3

addressLine4

addressUsageComment

adoptedCode

adoptedCodeDescription

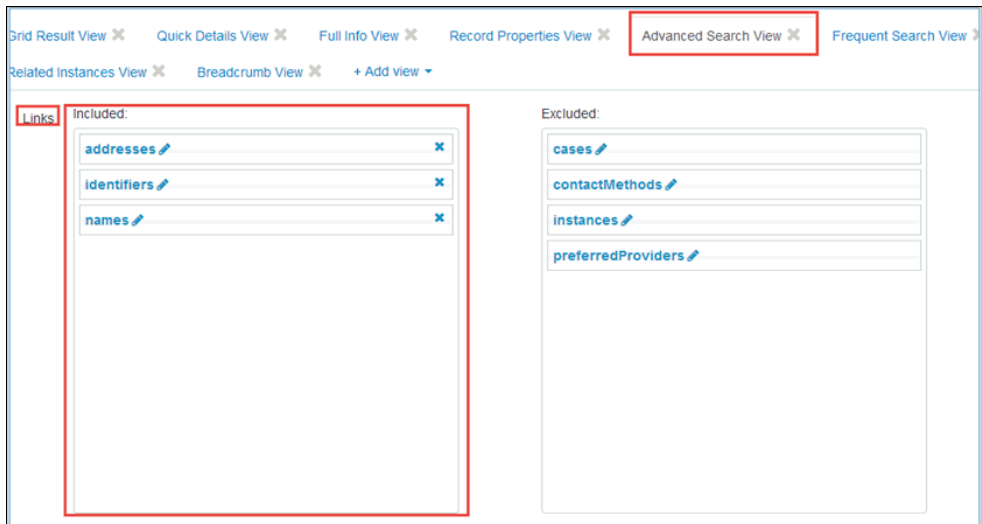
adoptedCodeId

ambulatoryStatusCode

ambulatoryStatusCodeDescription

ambulatoryStatusCodeId

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 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:

firstName	X
lastName	X
dateOfBirth	X
mrn	X
ssn	X

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 v

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

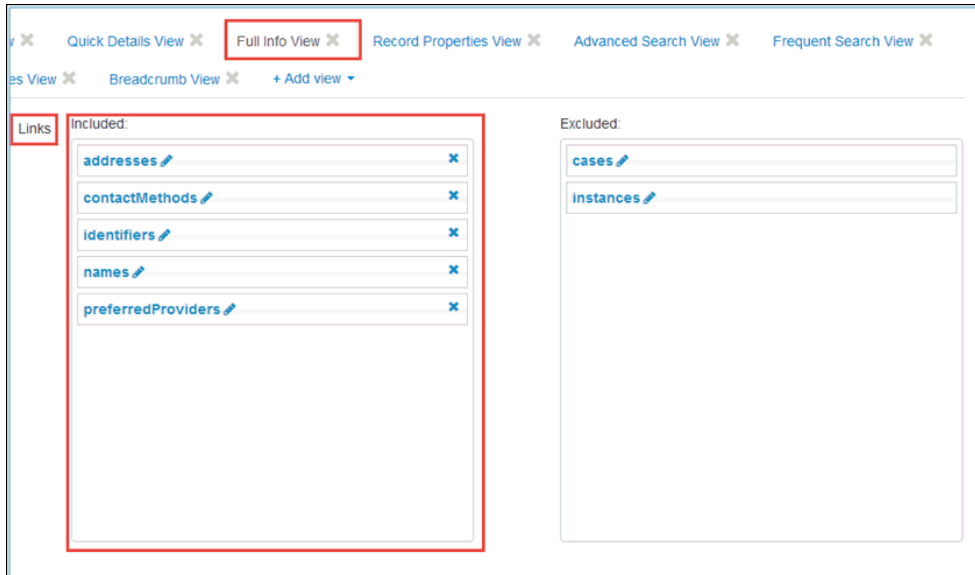
adoptedCodeId

ambulatoryStatusCode

ambulatoryStatusCodeDescription

ambulatoryStatusCodeId

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 ☒ Related Instances View ☒ Frequent Search View ☒ Advanced Search View ☒

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

Included:

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

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.

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 ▾

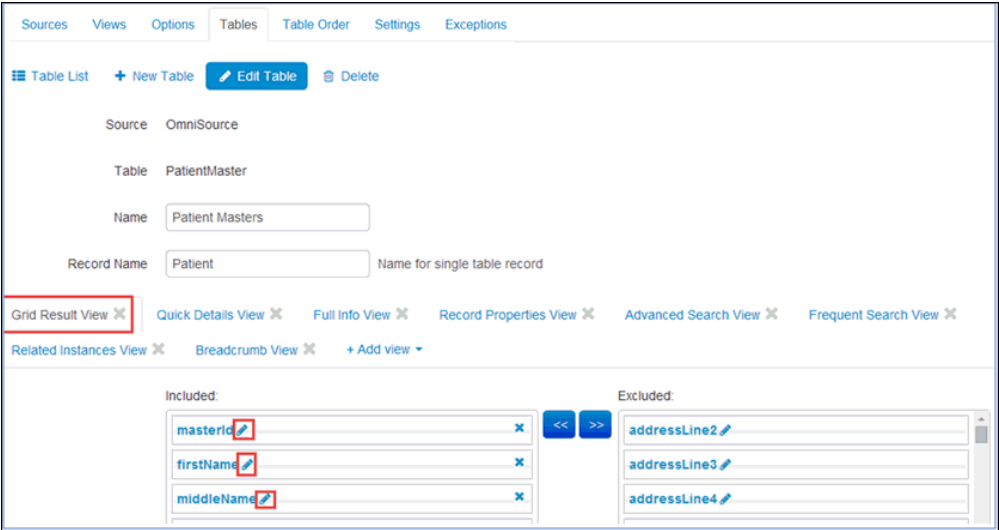
Included:

- masterid
- omniModifiedDate

Excluded:

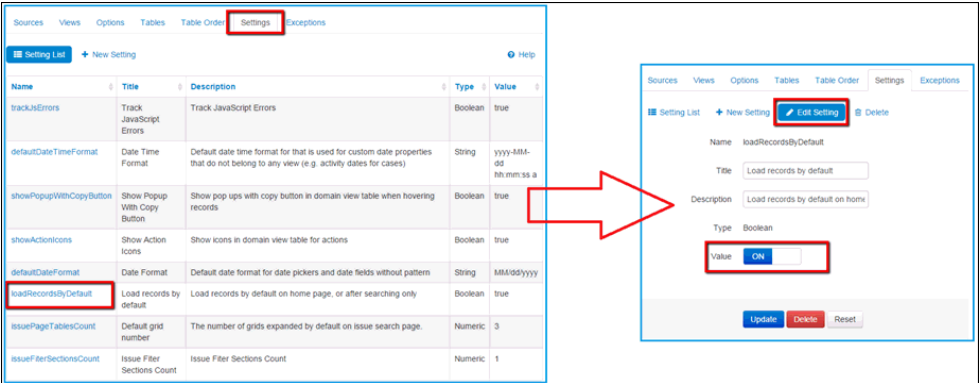
- addressLine1
- addressLine2
- addressLine3
- addressLine4
- addressUsageComment
- adoptedCode
- adoptedCodeDescription
- adoptedCodeId
- ambulatoryStatusCode
- ambulatoryStatusCodeDescription
- ambulatoryStatusCodeId

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 configuration interface. On the left, a table lists various settings. The 'showPopupWithCopyButton' setting is highlighted with a red box. A red arrow points from this setting to the right-hand panel, which shows the 'Edit Setting' form for 'showPopupWithCopyButton'. In this 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 configuration interface. On the left, a table lists various settings. The 'showActionIcons' setting is highlighted with a red box. A red arrow points from this setting to the right-hand panel, which shows the 'Edit Setting' form for 'showActionIcons'. In this 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 with a red box), 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

Below the configuration fields, there are several view options: Breadcrumb View, Advanced Search View, Record Properties View, Full Info View, Quick Details View, and Grid Result View. A '+ Add view' button is also present.

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 the 'Settings' tab in the application configuration interface. The 'Settings List' section displays a table with one entry: 'isDataExpandedByDefault'. The 'Title' field is 'Expand All' and the 'Description' field is 'Defines default display of section'. The 'Type' is 'Boolean' and the 'Value' is set to 'ON'. At the bottom, there are 'Update', 'Delete', and 'Reset' buttons.

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

This section describes the configurations for the remediation pages.

Issues Page

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' configuration page with the following elements:

- Navigation tabs: Sources, Views, Options, Tables, Table Order, Settings, Exceptions.
- Views List section with a '+ New View' button.
- Title field: Case Issues Grid View
- Name field: caseIssuesGridView
- Exclude All toggle: ON
- Has Column Groups toggle: OFF
- Has Column Sub Groups toggle: OFF
- Has Column Sections toggle: OFF
- Has Links toggle: OFF
- Buttons: Create, 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 shows the PartyMaster interface with a table of ticket issues. The table has columns: Id, Severity, Systems, Ssn, Id User Created, Create D T, Update D T, Days Old, Ticket Count, Lastname, and Firstname. A red box highlights the first eight columns, and a red arrow points to the 'Systems' column. A blue box highlights the 'Lastname' and 'Firstname' columns, and a blue arrow points to the 'Firstname' column. Below the table, the 'My Cases Filter View' and 'Case Issues Grid View' are shown. The 'My Cases Filter View' has a red box around the 'Included' list, which contains: id, severity, systems, ssn, idUserCreated, createDT, updateDT, daysOld, and ticketCount. The 'Case Issues Grid View' has a blue box around the 'Included' list, which contains: assignmentDT, caseType, casename, closedFlag, currentState, documentName, documentReference, idUser, idUserUpdated, instanceCount, and last_name. The 'Domain Columns' section shows 'Parties' and 'Party Masters' with 'last_name' and 'first_name' in the 'Included' list.

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 'New View' configuration form. The 'Views' tab is selected. The form includes a 'Views List' section with a '+ New View' button. Below this, there are input fields for 'Title' (containing 'Ticket Issues Grid View') and 'Name' (containing 'ticketIssuesGridView'). There are also toggle switches for 'Exclude All' (set to 'ON'), 'Has Column Groups' (set to 'OFF'), 'Has Column Sub Groups' (set to 'OFF'), 'Has Column Sections' (set to 'OFF'), and 'Has Links' (set to 'OFF'). At the bottom, there are 'Create' and 'Reset' buttons. Red boxes highlight the 'Title', 'Name', and 'Exclude All' fields.

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.

PartyMaster 2

general 2

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

	Id	Severity	Systems	Sen	Id User Created	Create D T	Update D T	Days Old	Ticket Count
	7C9B71E6-1C3...		crm		PRIMARY/nad...	10/28/2015	10/28/2015	0	2

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

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

	Id	Severity	Systems	Sen	Id User Created	Create D T	Update D T	Days Old	Ticket Count
	6D9AFB45-018...		crm		PRIMARY/nad...	10/28/2015	10/28/2015	0	2

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

My Cases Filter View

Ad Cases Filter View

Ticket Issues Grid View

+ Add View

Included:

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

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

Description

Title

Table * [Patient Masters](#)

Type

View [Breadcrumb View](#)

Treat As

Width

Alignment

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 shows the configuration interface for the 'My Cases Filter View'. At the top, the 'Table' is set to 'WFCases'. Below this, there are fields for 'Name' (Wf Cases), 'Record Name' (Record), and an 'Info Tab Indicator' set to 'OFF'. A navigation bar includes links for 'Instance Issues Grid View', 'Master Issues Grid View', 'Grid Result View', and 'My Cases Filter View' (which is highlighted with a red box). Below the navigation bar, there are two sections: 'Included:' and 'Excluded:'. The 'Included:' section 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. A red arrow points from the 'fullName' column in the 'Excluded:' section to the 'Filters' panel on the right, indicating that this column is being moved to the included list. The 'Filters' panel on the right shows a list of filters, including 'Case Type' (with sub-filters: cleansing, general, matching), '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.

The screenshot shows the 'Settings' page with the 'Exceptions' tab selected. The 'Setting List' shows a setting named 'issueFilterSectionsCount' with a title and description of 'Issue Filter Sections Count'. The 'Type' is 'Numeric' and the 'Value' is '2'. A red box highlights the 'Value' field, and a red arrow points from it to the 'Filters' panel on the right. The 'Filters' panel shows the 'Case Type' and 'Casename' sections, each with three filter items: 'cleansing', 'general', and 'matching'. Each item has a checkbox and a number in a blue circle. The numbers are 6 for 'cleansing', 4 for 'general', and 5 for 'matching' in both sections. A red box highlights these filter items.

Filter Section	Filter Item	Value
Case Type	cleansing	6
	general	4
	matching	5
Casename	manual cleansing	6
	manual general	4
	manual matching	5

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

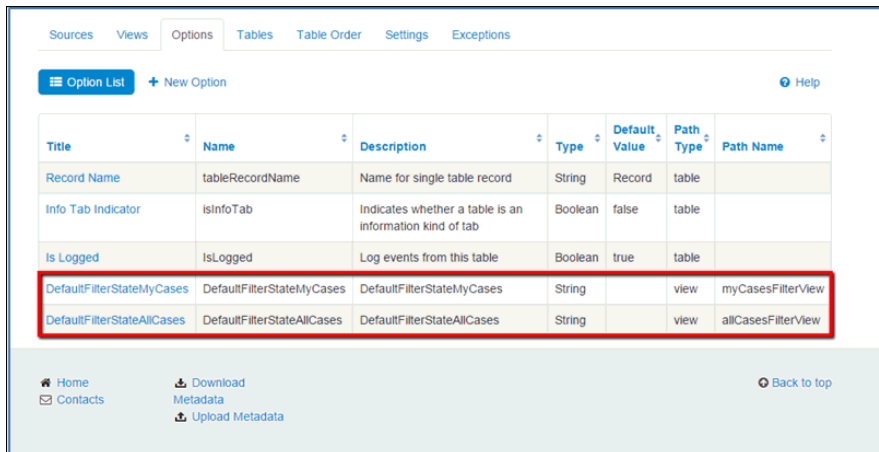
The screenshot shows the 'Options' tab of a configuration interface. At the top, there are tabs for 'Sources', 'Views', 'Options' (selected), 'Tables', 'Table Order', 'Settings', and 'Exceptions'. Below the tabs, there is an 'Options List' section with a '+ New Option' button. The form contains the following fields:

- 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' (blue) and 'Reset' (grey).

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.



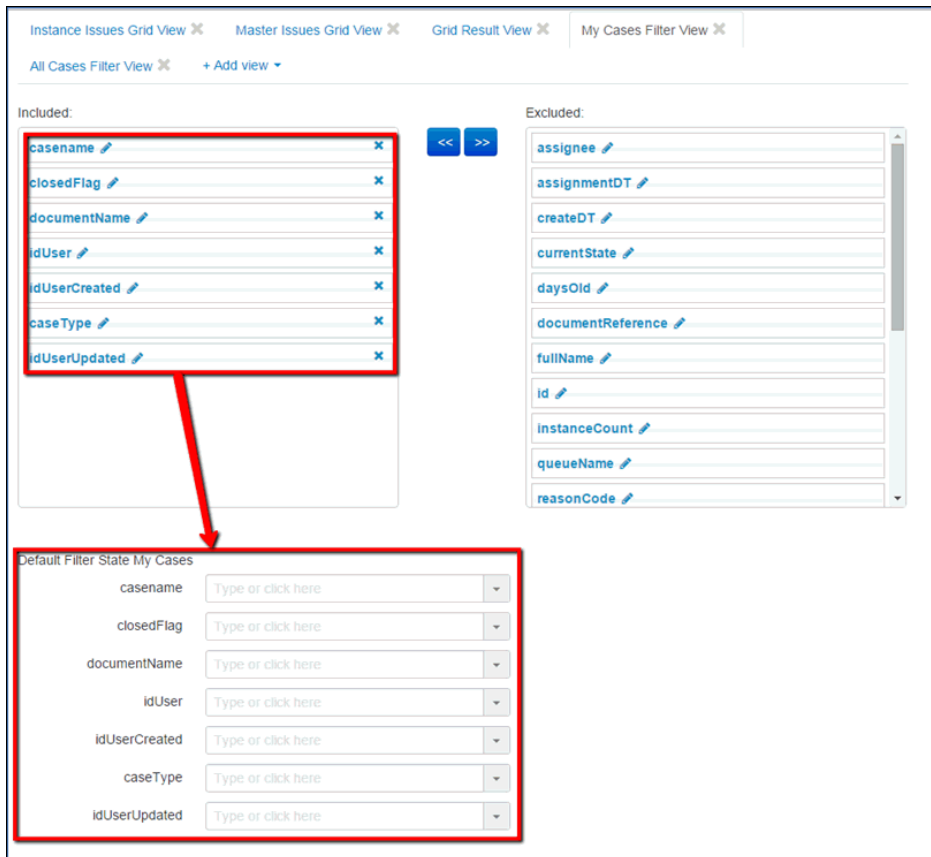
The screenshot shows a web application interface with a top navigation bar containing tabs: Sources, Views, Options (selected), Tables, Table Order, Settings, and Exceptions. Below the navigation bar, there is a sub-header with 'Option List' and a '+ New Option' button. A table of options is displayed with the following columns: Title, Name, Description, Type, Default Value, Path Type, and Path Name. The table contains five rows. The last two rows are highlighted with a red border.

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

At the bottom of the interface, there is a footer section with links: Home, Contacts, Download Metadata, Upload Metadata, and a 'Back to top' link.

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.

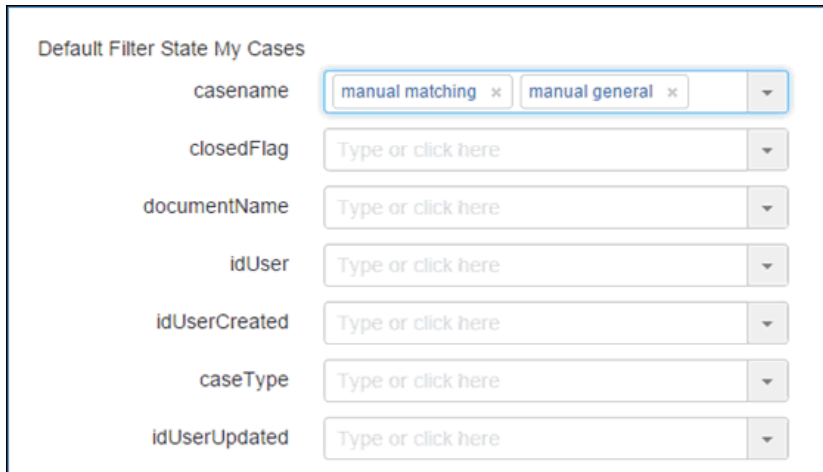
Default Filter State My Cases

casename	gene
closedFlag	manual general
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

Default Filter State My Cases

casename	
closedFlag	manual cleansing
documentName	manual matching manual general
idUser	Type or click here
idUserCreated	Type or click here
caseType	Type or click here
idUserUpdated	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 filtering cases. At the top, there are tabs for different views: Case Properties View, Advanced Search View, Quick Details View, My Cases Filter View, and All Cases Filter View. Below these, there are sections for 'Included' and 'Excluded' columns. A red box highlights the 'Included' section, which contains a list of columns: closedFlag, documentName, id, idUserCreated, idUserUpdated, idUser, and casename. A red arrow points from this section down to the 'DefaultFilterStateMyCases' section, which contains the same list of columns with multiselect dropdowns. To the right of this is the 'SwitcherValuesStateMyCases' section, which contains a list of columns with 'ON' buttons. A red box highlights this section. The 'Excluded' section on the right contains a list of columns: assignmentDT, createDT, daysOld, documentReference, fullName, instanceCount, queueName, recordStatus, severity, sourceName, and ssn.

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 ▾

Included:

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

Excluded:

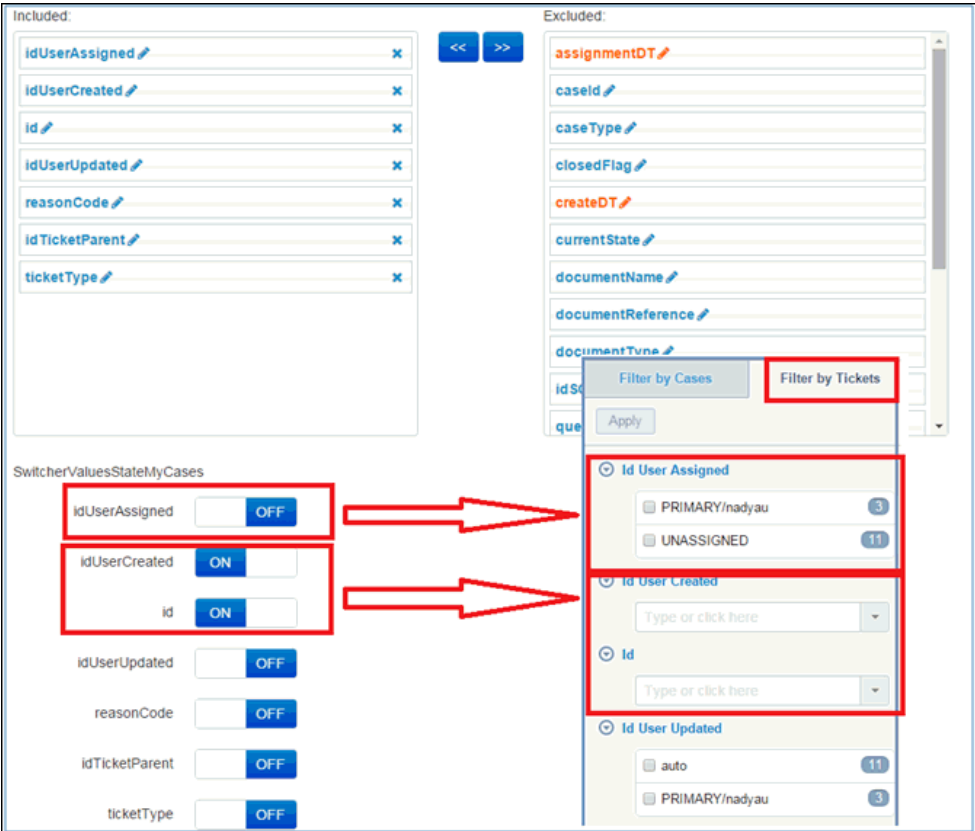
- documentReference
- documentType
- idSCXML
- queueName
- recordStatus
- refTargetName
- refTargetType
- updateDT
- viewedFlag
- ticketSeverity
- reasonDesc

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.



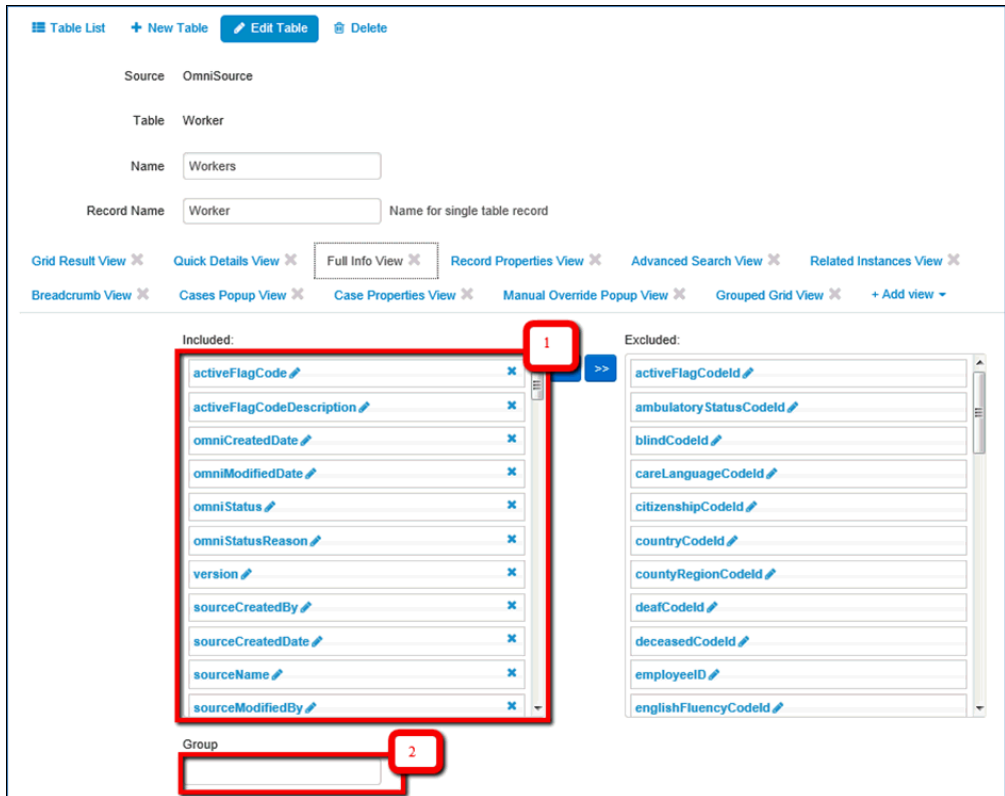
Override Matching Page

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.

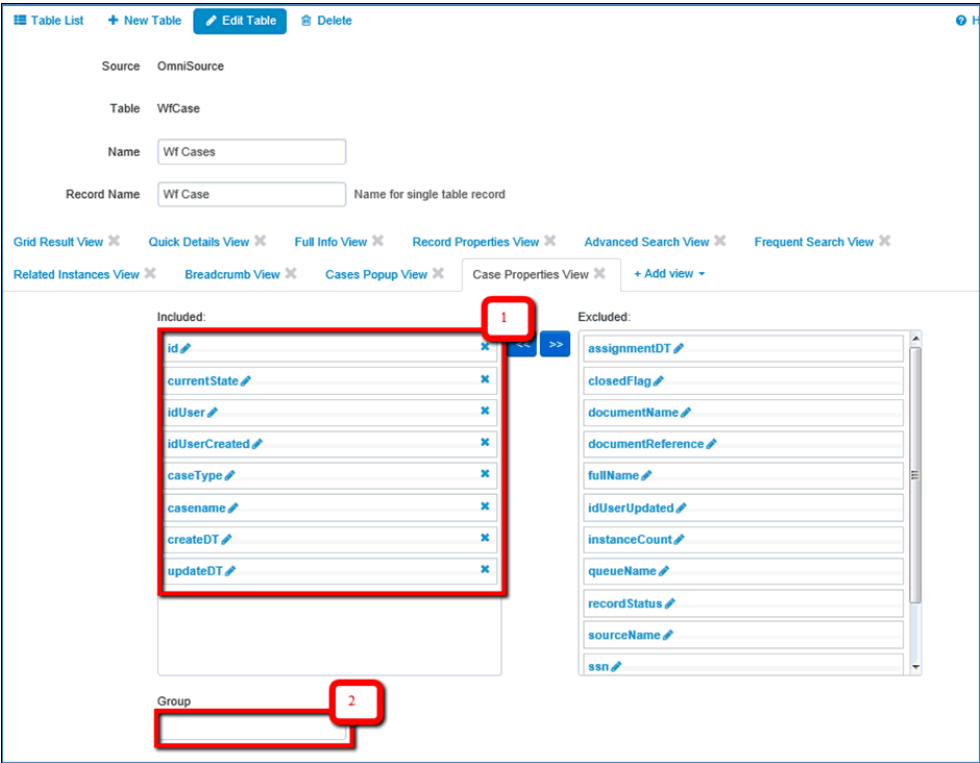
Click the X icon if you wish to exclude a column from the view (1).

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.



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.

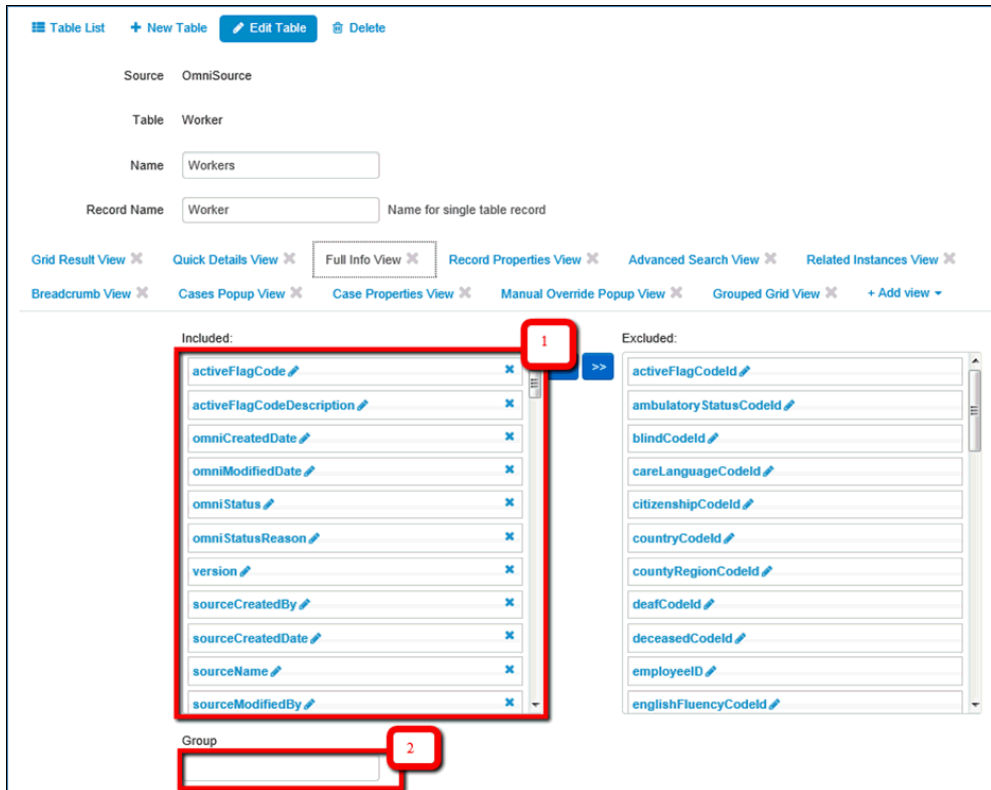
Manual Cleansing Page

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.



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' (with a pencil icon), and 'Delete' (with a trash icon). The configuration form includes the following fields:

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

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' and the 'Table' is 'WFCase'. The 'Name' field contains 'WF Cases' and the 'Record Name' field contains '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 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.

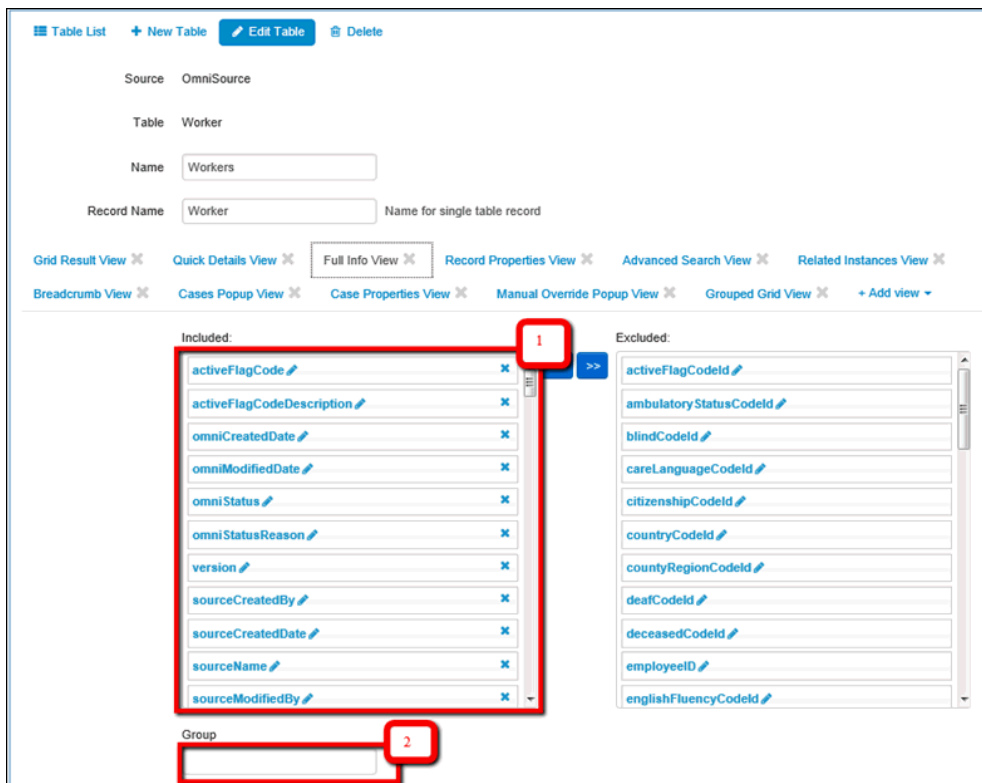
General Issue Page

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.



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).

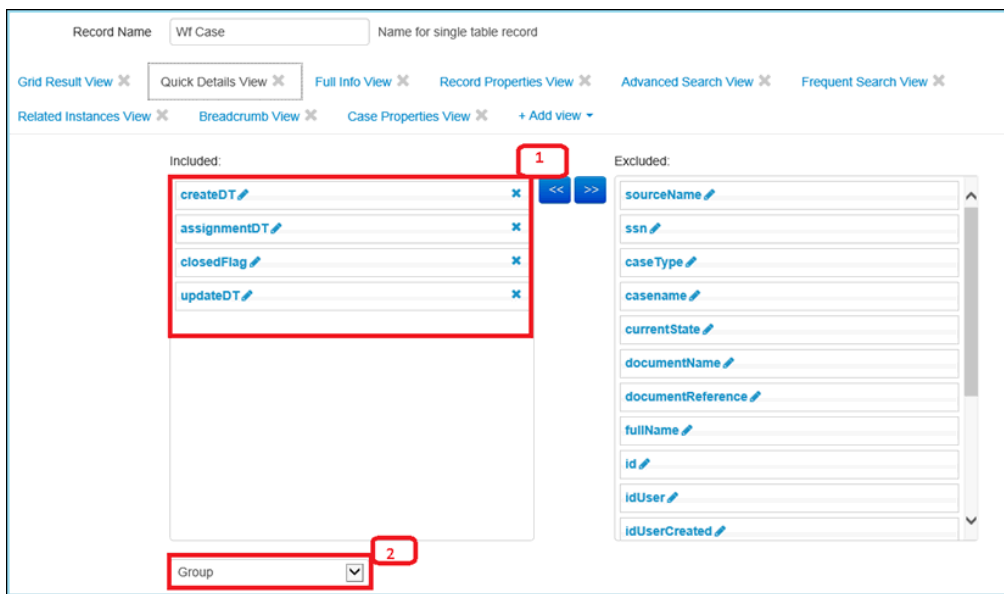
Note: For this view, the names of groups will not be displayed. A horizontal line will appear instead.

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.

Step 1: The first screenshot shows the 'Table List' view. A red box highlights the 'Name' column, and a red arrow points to the 'Patient Masters' table. The table list includes:

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

Step 2: The second screenshot shows the 'Edit Table' view for the 'Patient Masters' table. A red box highlights the 'Edit Table' button. The table data is as follows:

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	24556 BROOKWOOD HILLS RD	Athens	Illinois	62613	2015-04-22T17:33:09.633+03:00
15	Glanni	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 AVE	LOS ANGELES	California	90025-2209	2015-04-22T17:30:48.113+03:00

Step 3: The third screenshot shows the 'Full Info View' for the 'Patient Masters' table. A red box highlights the 'Full Info View' button. The view displays a list of included and excluded fields for the 'Demographics' entity type.

Included	Excluded
Demographics	adoptedCodeId
firstName	ambulatoryStatusCodeId
middleName	badDebtCodeId
lastName	blindCodeId
fullName	careLanguageCodeId
suffix	citizenshipCodeId
prefix	countryCodeId
title	countryRegionCodeId
dateOfBirth	deafCodeId
ssn	deceasedCodeId
addressLine1	disabilityCodeId

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 interface. At the top, there are several view tabs: Breadcrumb View, Related Instances View, Frequent Search View, Advanced Search View, Record Properties View, and Full Info View (which is selected). Below these are more options: 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 under the 'Demographics' group, including firstName, middleName, lastName, fullName, suffix, prefix, title, dateOfBirth, ssn, and addressLine1. The 'Excluded:' column contains a list of fields 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 second part of the screenshot.

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

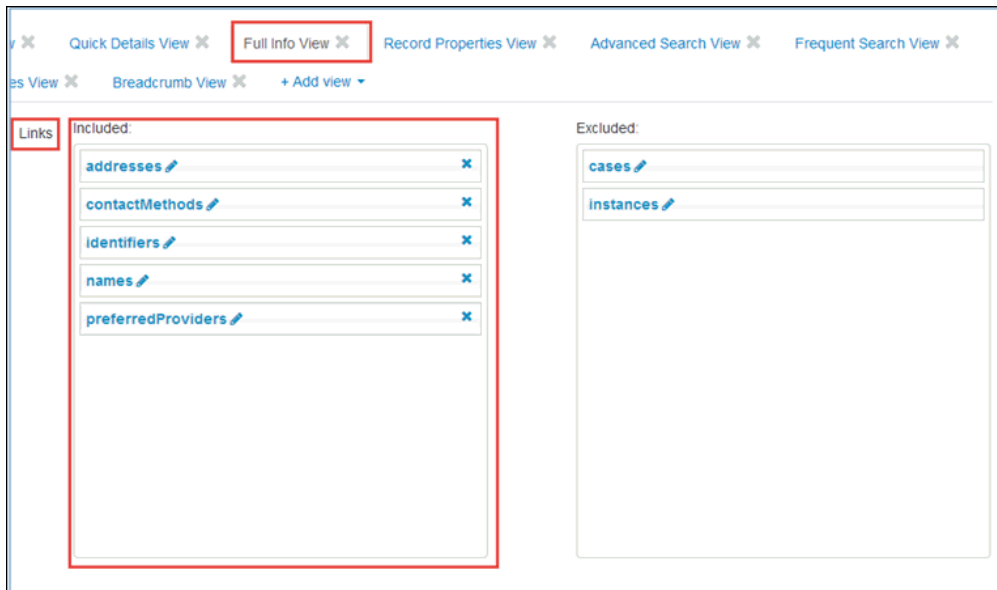
Breadcrumbs Configuration

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 the record ID 'D24E3310-A96B-4B04-9BD4-A14FBB6D4B40' with a creation timestamp of '2015-12-03 12:35:41 PM'. Below this, a large red arrow points down to the 'Tables' tab in the navigation menu. The 'Tables' tab is active, showing a list of tables with 'WF Case' selected. The configuration for 'WF Case' is displayed, including fields for 'Name' (set to 'Wf Cases'), 'Record Name' (set to 'Wf Case'), and various toggle switches for 'Info Tab Indicator' (OFF), 'Is Logged' (ON), and 'Use multiselect for default values' (ON). The 'Breadcrumb View' is highlighted in the 'Case Properties View' section. Below this, the 'Included' section shows a list of fields: 'Id' and 'createDT', both with edit icons and close buttons. The 'Excluded' section is empty.

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.



Enhanced Access Security: Column-Based and Row-Based

This section describes how to configure column-based access security and row-based access security in the Omni Governance Console (OGC).

In this appendix:

- ☐ [Overview](#)
- ☐ [Configuring Enhanced Security](#)
- ☐ [Enabling Enhanced Security](#)
- ☐ [Configuring Column-based Security](#)
- ☐ [Configuring Row-Based Access Security](#)
- ☐ [Supporting Enhanced Security Using WS02 Identity Server](#)
- ☐ [Merging and Reorganizing Column Sets](#)

Overview

Enhanced security for the 360 Viewer and Remediation applications in the Omni Governance Console (OGC) is available in two forms (Column-based access security and Row-based access security).

- ☐ Column-based access security provides the ability to restrict access to any column in any table to any user.

For example, all data stewards would see six columns of data in a 360 view of a subject, while finance managers would also see a seventh, restricted access data column, such as Revenues Received.

- ☐ Row (or column criteria)-based access security provides the ability to restrict the display of rows in any table where the value of the content in any column is a configurable value.

For example, the rows of customer master records displayed for regional managers can be restricted to the rows where the Region column contains a value that is specific to the region of the manager.

By default, Column-based access security and Row-based access security are disabled and can be enabled independently as required.

Configuring Enhanced Security

This section provides an example that describes how to configure enhanced security using the Administration console.

After deploying a deployment bundle that was created using Omni Designer, log in to the Omni Governance Console (OGC) and click the *Administration* tab on the OGC menu bar. The Administration console opens. Click the *Tables* tab, which is used to configure metadata (MData) views in an *MData.xml* file.

The MData is used to describe the OGC home page of a typical Subject master. From the Administration console, you can access the existing MData by clicking *Table*, selecting *SupplierMaster*, *Edit Table*, and then clicking *Grid Result View*. In this example, the following columns are included by default:

- ☐ id
- ☐ company_name
- ☐ first_name
- ☐ last_name
- ☐ credit_rating
- ☐ primary_geo_area

☐ ssn_TIN

Use multiselect for default values ☒

Grouped Grid View ✕ Manual Override Popup View ✕ Case Properties View ✕

Related Instances View ✕ Frequent Search View ✕ Advanced Search View ✕

Quick Details View ✕ **Grid Result View ✕** My Cases Filter View ✕ All Case: ✕

Ticket Issues Grid View ✕ DQM Filters ✕ DQM Breakouts ✕ DQM Grid View ✕

Grouping Search View ✕ + Add view ▼

Included:

Id ✎	✕
company_name ✎	✕
first_name ✎	✕
last_name ✎	✕
credit_rating ✎	✕
primary_geo_area ✎	✕
ssn_TIN ✎	✕

<< >>

Excluded:

Master!
Master!
Master!
Master!
Master!
Master!
OmniCr

The following is a list of users who have WSO2 roles of *Internal/domain.SupplierMaster* and *Internal/domain.Supplier*, which provides them access to the Supplier domain:

- ☐ PRIMARY/Super_a
- ☐ PRIMARY/Super_b
- ☐ PRIMARY/ds_a
- ☐ PRIMARY/ds_b

Upon logging in to the Omni Governance Console (OGC), the following screen is displayed, which shows the seven columns defined when enhanced security is disabled.

Id	Company_name	First_name	Last_name	Credit_rating	Primary_geo	Sen_TIN	Issues	Actions
SupplierMaste...	Driven Drawing Inc.	Susie	Kanipe	A-2	South	487-23-0023		
SupplierMaste...	Adhesive Coll Inc.	Colombain	Persad	Prime	D			
SupplierMaste...	Purification Gene...	Clarinda	Javarone	B	Mountain	529-25-0025		
SupplierMaste...	Broughty Plastics...	Beeta	Kroell	A-1+	MidAtlantic	489-09-0009		
SupplierMaste...	Fablit Ayre Co.	Shyanne	Kodian	B+	West	019-19-0019		
SupplierMaste...	Cassette Charteri...	Rolande	Navy	A-2	South	313-07-0007		
SupplierMaste...	Shops Dataconne...	Lothaire	Borkoski	A-2	South	313-07-0007		
SupplierMaste...	Autostylng Disc Co	Dan	Pinkley	A-3	West	534-50-0050		
SupplierMaste...	Aeming John Co	Darci	Haaby	C+	Mountain	123-34-0034		
SupplierMaste...	Tubs Woodhouse...	Laurissa	Gragas	A-1+	Northeast	474-26-0026		

Enabling Enhanced Security

By default, column-based access security and row-based access security are disabled. However, each security type can be enabled independently. The corresponding settings are available in the Omni Console (Configuration, Managed Services) under the OGC Tomcat tab, as shown in the following image.

Setting	Value
reposervice.username	super
reposervice.password	*****
Column Based Authorization Enable	false
Row Criteria Based Authorization Enable	false
SSO Active	true

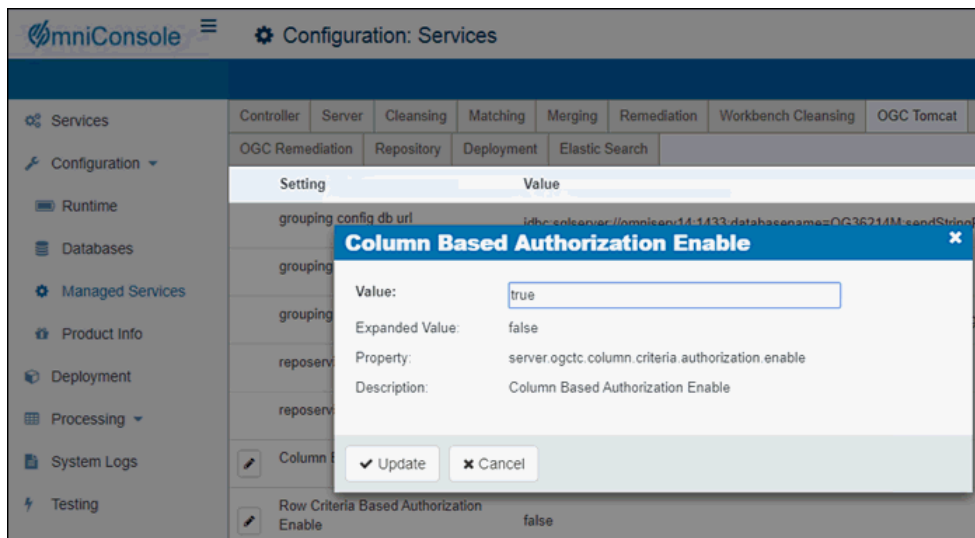
The settings are listed and labeled as follows:

- ☐ Column Based Authorization Enable

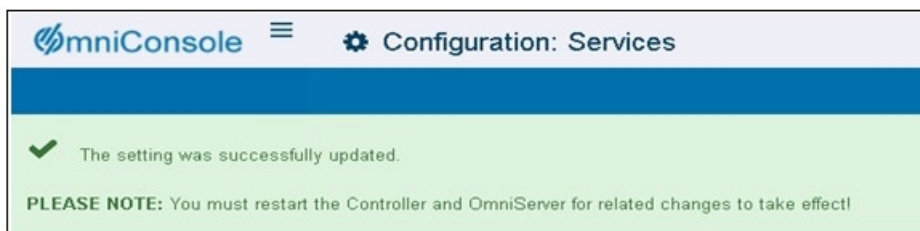
☐ Row Criteria Based Authorization Enable

To enable individual or both enhanced security settings:

1. Click the corresponding pencil icon to the left of the security setting.
2. Change the value from *false* to *true*.
3. Click *Update*, as shown in the following image.

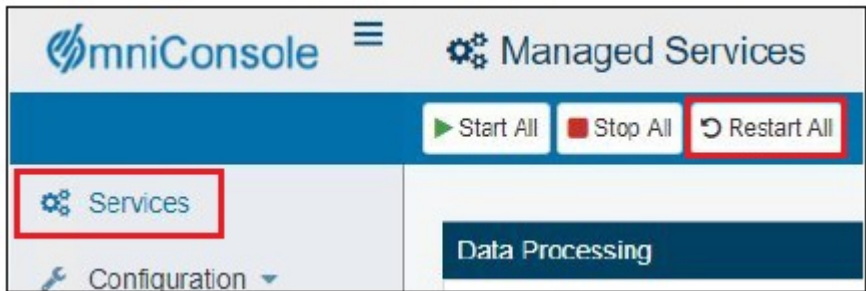


After the setting has been updated (enabled), a message indicating a successful update is displayed in a green banner, as shown in the following image.



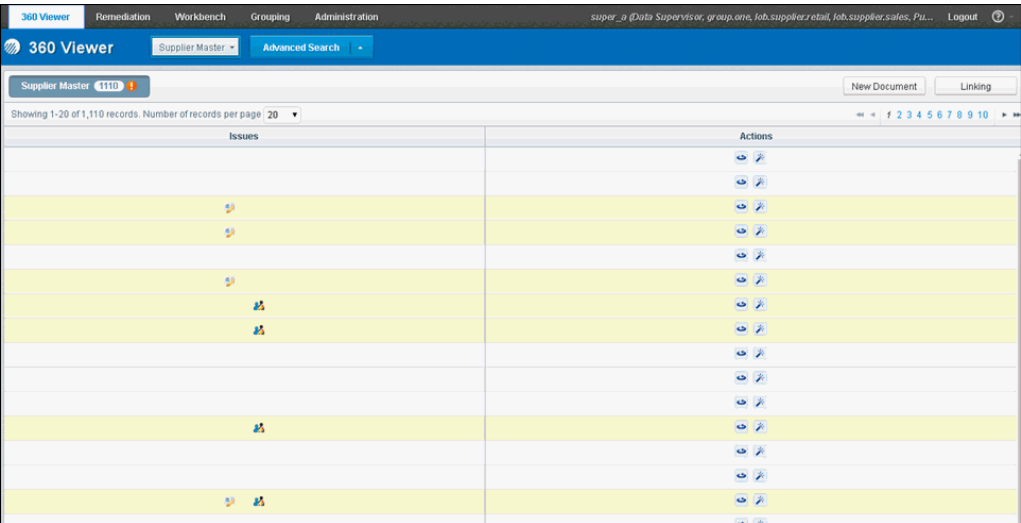
4. Close the green banner by clicking the X icon, which is located on the right-hand side of the banner.
5. Click *Services* in the left pane of the Omni Console.

The Managed Services pane opens, as shown in the following image.



- 6. click *Restart All*
- 7. After restarting, log on to the Omni Governance Console (OGC), which now has column or row-based security enabled, depending on the settings you specified in the Omni Console.

The following image shows the 360 Viewer with columns not enabled for access and not displayed. To display columns, you must enable them per Table, View, and user with the Enhanced Security management tool.



Note: Only the columns or rows with access allowed are displayed. Issues and actions are not columns. Rather they are navigation aids.

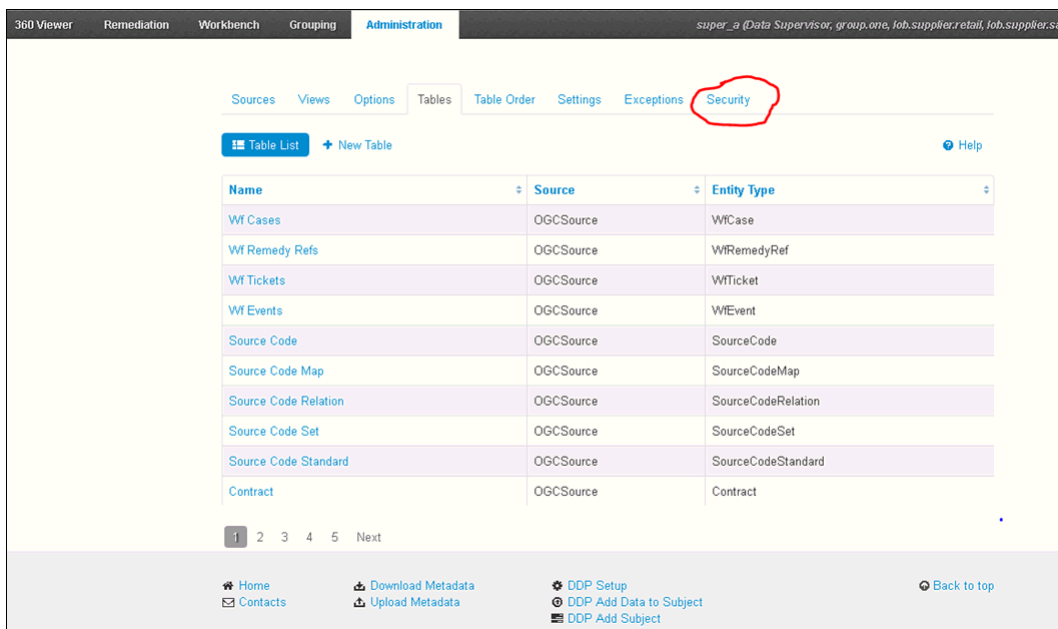
The following list describes a sample configuration using the four users that were mentioned previously.

- ☐ All four users should see five of the seven columns.

- ❑ Only user *Super_a* is cleared to access the two sensitive columns (*credit_rating* and *ssn_TIN*).
- ❑ User *Super_b* can see the five columns and the *ssn_TIN* column.

Configuring Column-based Security

The Security tab appears in the Administration console when either or both switches are enabled, as shown in the following image.



Click the Security tab to open the Enhanced Security management tool. This tool is used to configure access to any column or row in all OGC tables (screens) for specific users.

Configuring Column Access

The Enhanced Security management tool consists of the following sections:

- ❑ domains list (located on the left pane)
- ❑ column sets editor (located on the right pane)

From the domains list, you can select a specific domain to access and configure its data.

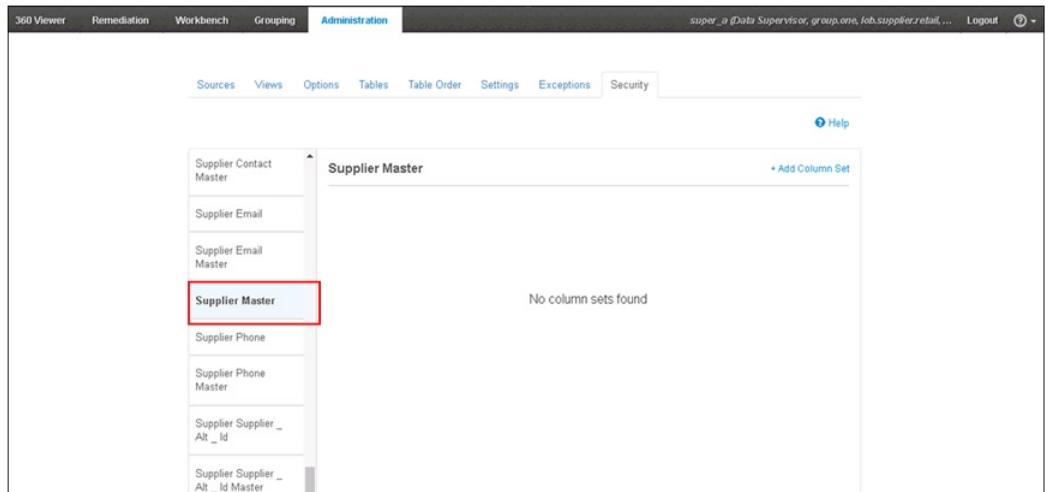
Using the column sets editor, the security administrator can create a set of columns that will be visible to a specific user.

Procedure: How to Add a New Column Set

If there are no column sets created for a specific domain, the *No column sets found* message appears.

To add a new column set:

1. From the domains list in the left pane, scroll down and click the domain (subject or sub collection) to which you want to grant column access (for example, Supplier Master), as shown in the following image.



2. Click *Add Column Set*.

A new column set appears with the list of available columns for the selected domain, as shown in the following image.

The screenshot shows the 'Supplier Master' configuration page. On the left is a sidebar with a list of domain categories: Supplier Address Master, Supplier Contact, Supplier Contact Master, Supplier Email, Supplier Email Master, Supplier Master (highlighted), Supplier Phone, Supplier Phone Master, Supplier Supplier _ Alt _ Id, Supplier Supplier _ Alt _ Id Master, Supplier Supplier _ Item, and Supplier Supplier _ Item Master. The main content area is titled 'Supplier Master' and contains a section for 'Column set 1'. This section includes a 'Users' dropdown menu currently showing 'Please select a users'. Below this is a table of columns with checkboxes for selection and a 'Show Data' button. The columns listed are: Company _ name, Credit _ rating, Credit _ rating Description, Credit _ rating Id, Dba _ name, First _ name, Full _ name, General Issue, Id, Last _ name, Legal _ class _ type, and Legal _ class _ type Desc. Each column has a checkbox and a dropdown menu set to 'All'. At the bottom right of the column set section are 'Details', 'Save', and 'Delete' buttons.

A new column set consists of the following:

- ☐ Column selection list
- ☐ Row criteria selectors
- ☐ Save and Delete buttons

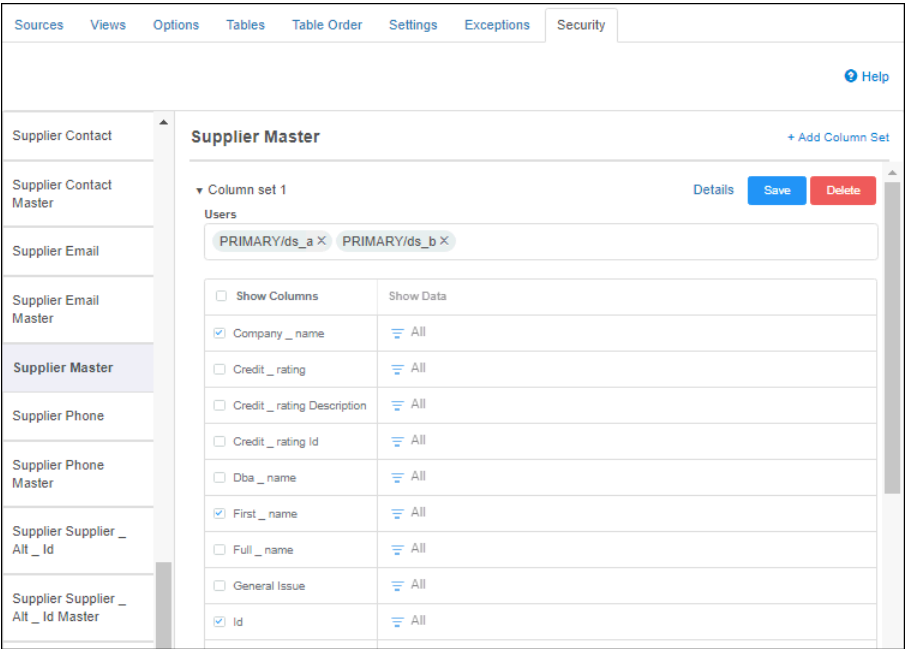
Note that the validation is active and notifies you that at least one user name and one column must be selected for the created column set.

3. Select the check box for each column you want to allow access.
4. Click the Users drop-down list to view a list of available users.
5. Select the user(s) that you want to grant access to the column set of selected columns.

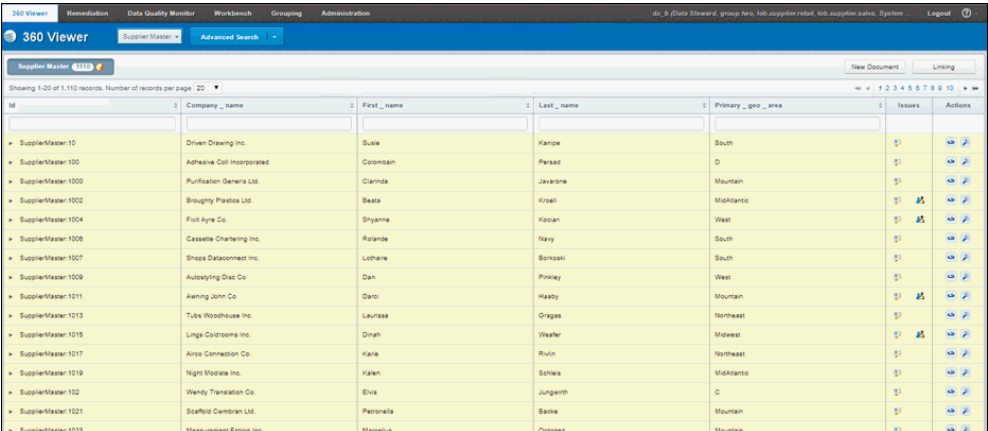
For example, to configure the first column set, select the check box for the five non-sensitive columns, and enter the two most restricted view user IDs (for example, *ds_a* and *ds_b*).

6. Click Save.

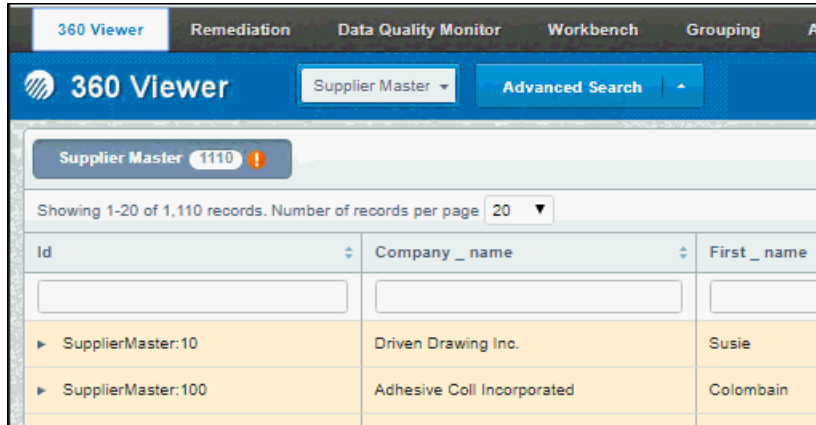
- 7. Expand the desired column set name (for example, *Column set 1*) to view the users and columns within the column set, as shown in the following image.



- 8. Confirm your changes to the users or columns, and then click Save.
- 9. Log on to OGC as one of the newly configured users (for example, *ds_a* or *ds_b*) and verify that the 360 Viewer has allowed the configured access results (for example, the five columns that were just specified), as shown in the following image.



Note the orange exclamation icon, which appears next to the user ID, as shown in the following image.

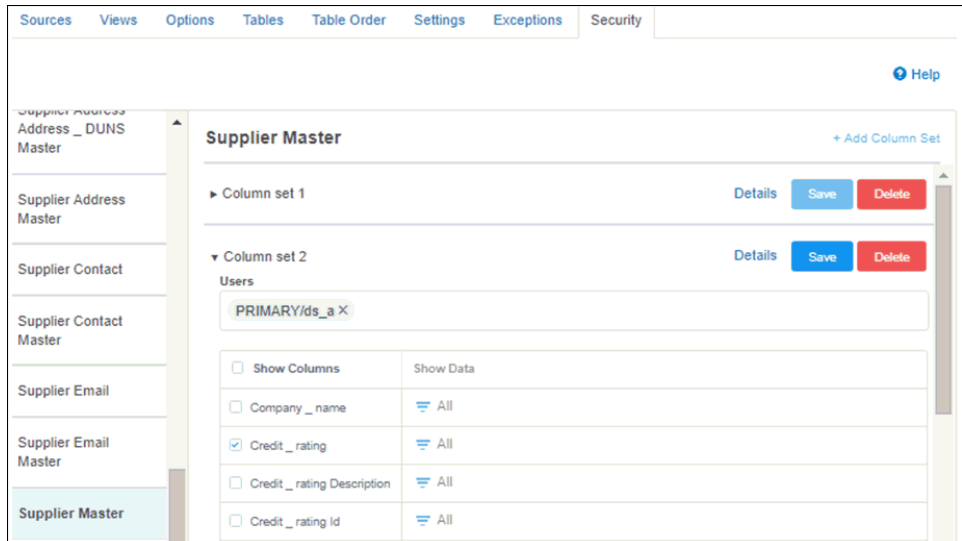


Id	Company _ name	First _ name
SupplierMaster:10	Driven Drawing Inc.	Susie
SupplierMaster:100	Adhesive Coll Incorporated	Colombain

This icon indicates that data may be restricted due to security purposes.

- Enter two more column sets allowing the appropriate user access to the data.

For example, add *Column set 2* to the *Supplier Master* domain, and allow the *PRIMARY/super_a* user access to seven columns, the same five configured in *Column set 1*, in addition to *credit_rating* and *ssn_TIN*, as shown in the following image.



Column set 2	Users	Show Columns	Show Data
Column set 2	PRIMARY/super_a	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/> Company _ name	<input type="checkbox"/> All
		<input checked="" type="checkbox"/> Credit _ rating	<input type="checkbox"/> All
		<input type="checkbox"/> Credit _ rating Description	<input type="checkbox"/> All
		<input type="checkbox"/> Credit _ rating Id	<input type="checkbox"/> All

11. Log on to OGC as the *PRIMARY/super_a* user and verify access to the seven configured columns, as shown in the following image.

Id	Company_name	First_name	Last_name	Credit_rating	Primary_geo_area	Sen_TIN	Issues	Actions
SupplierMaster10	Driver Drawing Inc.	Sube	Kranpe	A-2	South	487-23-0023	51	Details Save Delete
SupplierMaster100	Adhesive Cell Incorporated	Colombian	Pierad	Prime	D		51	Details Save Delete
SupplierMaster1000	Purification Systems Ltd.	Carmela	Jervone	B	Mountain	829-25-0025	51	Details Save Delete
SupplierMaster1002	Broughty Plastics Ltd.	Beata	Kroell	A-1+	Midatlantic	489-06-0009	51	Details Save Delete
SupplierMaster1004	Frost Ayre Co.	Snyame	Kocan	B+	West	019-19-0019	51	Details Save Delete
SupplierMaster1006	Cassette Channing Inc.	Rolande	Navy	A-2	South	313-07-0007	51	Details Save Delete
SupplierMaster1007	Shops Dataconnect Inc.	Lothare	Borkski	A-2	South	313-07-0007	51	Details Save Delete
SupplierMaster1007	Autoglym Dist Co.	Dan	Pinkey	A-3	West	834-80-0050	51	Details Save Delete
SupplierMaster1011	Awning John Co.	Darri	Healy	C+	Mountain	123-34-0034	51	Details Save Delete
SupplierMaster1013	Tuba Woodhouse Inc.	Leunasa	Gragas	A-1+	Northeast	474-29-0025	51	Details Save Delete
SupplierMaster1015	Lings Coldrooms Inc.	Dinah	Wearler	A-2	Midwest	850-49-0059	51	Details Save Delete
SupplierMaster1017	Almsa Connection Co.	Kane	Ruin	C+	Northeast	015-22-0022	51	Details Save Delete
SupplierMaster1019	Night Modale Inc.	Kalen	Schies	B+	Midatlantic	088-88-0088	51	Details Save Delete
SupplierMaster102	Wendy Translation Co.	Elvis	Jungerth	Prime	C	399-29-0029	51	Details Save Delete
SupplierMaster1021	Scotford Cambrian Ltd.	Patronella	Backe	B+	Mountain	214-85-0085	51	Details Save Delete
SupplierMaster1023	Measurement Entron Inc.	Manuelus	Ordonez	A-3	Mountain	240-18-0018	51	Details Save Delete

12. Add *Column set 3* to the *Supplier Master* domain, as shown in the following image.

Supplier Master

+ Add Column Set

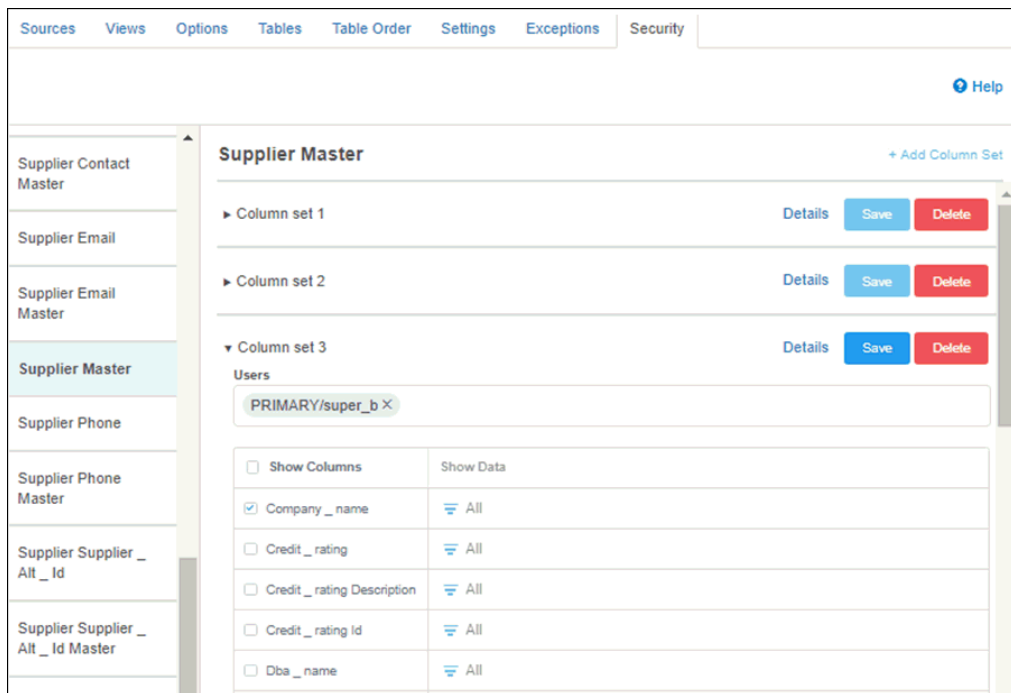
Column set 1

Details Save Delete

Column set 2

Details Save Delete

13. Allow the *PRIMARY/super_b* user access to *ssn_TIN* in addition to the five columns granted in the *Supplier Master* domain for *Column set 1*, as shown in the following image.



14. Log on to OGC as the *super_b* user to verify that the sixth column, *ssn_TIN*, is accessible, as shown in the following image.

ID	Company _ name	First _ name	Last _ name	Primary _ geo _ area	ssn_TIN	Issues	Actions
SupplierMaster 10	Orion Drawing Inc.	Sude	Kanpe	South	487-23-0023		
SupplierMaster 100	Adhesive Col Incorporated	Colombar	Parasid	O			
SupplierMaster 1000	Purification Genens Ltd.	Grainda	Javanone	Mountain	520-25-0025		
SupplierMaster 1002	Broughty Plastics Ltd.	Beata	Kroel	Midkanto	480-08-0008		
SupplierMaster 1004	Flint Ayns Co.	Shynne	Kocari	West	018-19-0019		
SupplierMaster 1008	Cassette Chartering Inc.	Rianda	Nary	South	313-07-0007		
SupplierMaster 1007	Shops Dataconnect Inc.	Lothane	Bonozaki	South	313-07-0007		
SupplierMaster 1009	Autostyley Disc Co	Dan	Pinkley	West	534-50-0050		
SupplierMaster 1011	Awming John Co.	Dani	Healy	Mountain	123-34-0034		
SupplierMaster 1013	Tube Woodhouse Inc.	Leunase	Gragas	Northeast	474-26-0026		
SupplierMaster 1015	Lunga Colonnas Inc.	Ornan	Wadler	Midwest	550-58-0058		
SupplierMaster 1017	Ampa Connection Co.	Kane	Rubin	Northeast	019-22-0022		
SupplierMaster 1019	Night Modeste Inc.	Kalen	Schans	Midkanto	090-85-0085		
SupplierMaster 102	Wendy Translation Co.	Elvis	Jungwerth	C	399-29-0029		
SupplierMaster 1021	Stafford Gembern Ltd.	Peronella	Bacine	Mountain	214-88-0088		

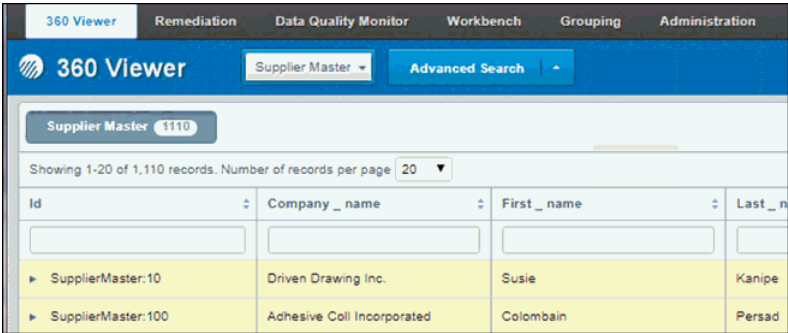
Note that a single column set can be configured for multiple users.

The selection of specific values is not required (for example, all values for a specific column are selected and displayed). However, if it is necessary to restrict or allow visibility of specific values for specific users, then the individual configurations must be configured via row-based access security.

Configuring Row-Based Access Security

Row-based access security allows you to see only the rows whose value in a specified column meets a configured value(s). For example, if user *ds_b* wants to display suppliers whose geographical area equals South or West.

In this example, all views regardless of which columns are allowed access for a specific user, a total of 1,110 records in the Supplier Master domain have been reported, as shown in the following image.



The screenshot shows the 360 Viewer application interface. At the top, there are tabs for '360 Viewer', 'Remediation', 'Data Quality Monitor', 'Workbench', 'Grouping', and 'Administration'. Below the tabs, the '360 Viewer' logo is on the left, and a dropdown menu shows 'Supplier Master' with an 'Advanced Search' button next to it. Below this, a summary bar indicates 'Supplier Master 1110'. A message states 'Showing 1-20 of 1,110 records. Number of records per page 20'. A table with four columns is displayed: 'Id', 'Company _ name', 'First _ name', and 'Last _ n'. The first two rows are visible: 'SupplierMaster:10' with 'Driven Drawing Inc.' and 'Susie Kanipe', and 'SupplierMaster:100' with 'Adhesive Coll Incorporated' and 'Colombain Persad'.

Id	Company _ name	First _ name	Last _ n
SupplierMaster:10	Driven Drawing Inc.	Susie	Kanipe
SupplierMaster:100	Adhesive Coll Incorporated	Colombain	Persad

Before proceeding with using the Show Data column in the Enhanced Security management tool to configure row-based access security, the *Row Criteria Based Authorization Enable* setting must be set to *true* in the Omni Console. To enable this setting from the Omni Console, click *Configuration*, select *Managed Services*, click the *OGC Tomcat* tab, and then change the switch to *true*. When you have finished enabling this setting, click *Services* in the left pane, and then click *Restart All*.

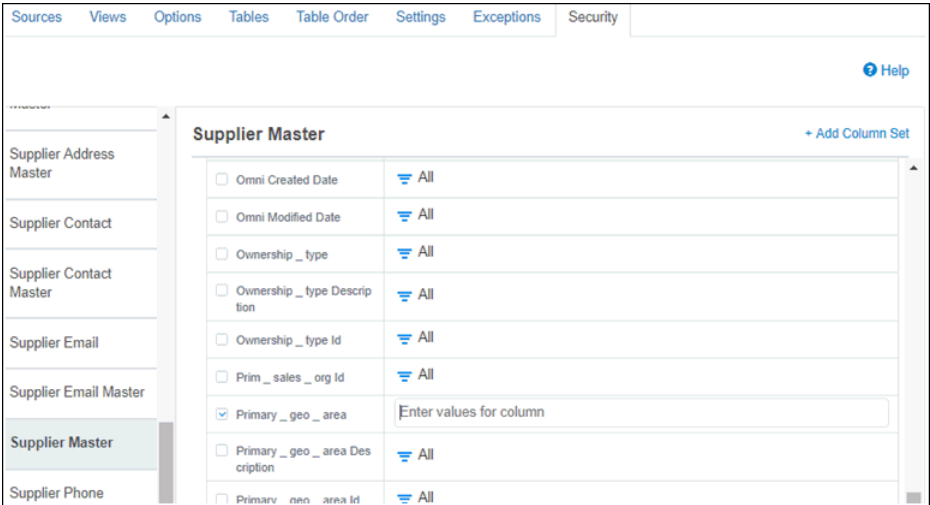
Procedure: How to Configure Row-based Access Security

To configure row-based access security:

1. From the Security tab in the Administration section of the Omni Governance Console (OGC), select the desired domain (for example, Supplier Master).

Note that in this example, there are three other Supplier Master Column sets.
2. Expand the desired Column set (for example, Column set 2).

3. Scroll down the column list until you find the set where you can enter values into the row (for example, *Primary_geo_area*) and expand the corresponding Show Data column, as shown in the following image.



4. Enter a value (for example, *West*) and press *Enter*.

The resulting value is displayed like a filter. For example:

```
'<column name> equals: <value1, value2...>'
```

5. Click *Save*.

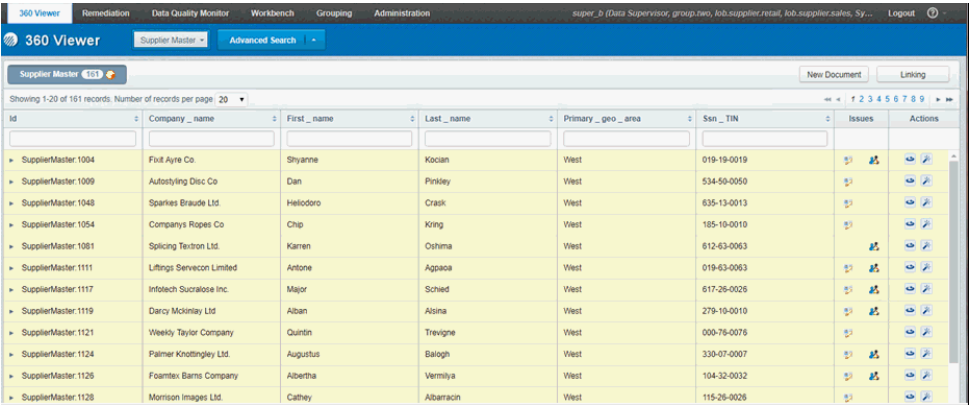
Note that in an upcoming release, a drop-down list with available values for specific columns will be implemented.

To delete a created or edited Column set, click the *Delete* button.

Procedure: How to Remove Individual Access Security Rules

To remove individual access security rules:

Log on to the Omni Governance Console as *PRIMARY/super_b* to view the six columns configured to be displayed, but only for the rows where *Primary_geo_area=West*, as shown in the following image.



Id	Company_name	First_name	Last_name	Primary_geo_area	Sen_TIN	Issues	Actions
SupplierMaster:1004	Frost Ayre Co.	Shyanne	Kocian	West	019-19-0019		
SupplierMaster:1009	Autostyling Disc Co	Dan	Pinkley	West	534-49-0050		
SupplierMaster:1043	Sparkies Braude Ltd	Heliodoro	Crask	West	635-13-0013		
SupplierMaster:1054	Company's Ropes Co	Chip	Kring	West	185-10-0010		
SupplierMaster:1081	Splicing Tectron Ltd.	Kamen	Oshima	West	612-43-0063		
SupplierMaster:1111	Liftings Serviceon Limited	Antone	Appasa	West	019-43-0063		
SupplierMaster:1117	Infotech Sucralose Inc.	Major	Schred	West	617-26-0026		
SupplierMaster:1119	Darcy McKinlay Ltd	Alban	Alsina	West	279-10-0010		
SupplierMaster:1121	Weekdy Taylor Company	Quintin	Trevigne	West	000-76-0076		
SupplierMaster:1124	Palmer Knottingley Ltd.	Augustus	Balogh	West	330-07-0007		
SupplierMaster:1126	Foamtex Barns Company	Albertha	Vermilya	West	104-32-0032		
SupplierMaster:1128	Morrison Images Ltd.	Cathy	Albaracin	West	115-28-0028		

Note that in the Supplier Master Count display, 1,110 records (rows) are no longer accessible, but rather only 161, which meet the *Primary_geo_area=West* criteria.

Note also that you can include more than one criteria value in the Show Data column for any displayed column. The criteria values are automatically evaluated using the OR operand to determine the display of each row. For example, the following image shows the second value of *South* being entered for *Primary_geo_area*.

The screenshot shows the 'Supplier Master' configuration interface. On the left is a sidebar with navigation links: Supplier Address Master, Supplier Contact, Supplier Contact Master, Supplier Email, Supplier Email Master, and Supplier Master (which is highlighted). The main area is titled 'Supplier Master' and contains a list of fields with checkboxes and dropdown menus. The 'Primary_geo_area' field is checked and its dropdown menu is open, showing 'West' and 'South' as selected options, separated by an 'x'. Other fields include 'Omni Created Date', 'Omni Modified Date', 'Ownership_type', 'Ownership_type Description', 'Ownership_type Id', 'Prim_sales_org Id', and 'Primary_geo_area Description'.

The resulting search criteria, West or South displays 318 Supplier Master rows, as shown in the following image.

The screenshot shows the '360 Viewer' application interface. At the top, there are tabs for '360 Viewer', 'Remediation', 'Data Quality Monitor', 'Workbench', 'Grouping', and 'Administration'. The '360 Viewer' tab is active, and the 'Supplier Master' table is selected. The table header shows 'Showing 1-20 of 318 records. Number of records per page: 20'. The table columns are: Id, Company_name, First_name, Last_name, Primary_geo_area, Sen_TIN, Issues, and Actions. The table contains 20 rows of data, each representing a supplier record. The 'Primary_geo_area' column shows values like 'South', 'West', 'South', 'South', 'West', 'South', 'South', 'South', 'South', 'South', 'South', 'South', 'South', 'South', 'South', 'South', 'South', 'South', 'South', 'South'. The 'Issues' column shows icons for each record, and the 'Actions' column shows icons for each record.

Id	Company_name	First_name	Last_name	Primary_geo_area	Sen_TIN	Issues	Actions
SupplierMaster10	Driven Drawing Inc.	Susie	Kanipe	South	487-23-0023		
SupplierMaster1004	Fruit Ayre Co.	Shyanne	Kocian	West	019-19-0019		
SupplierMaster1006	Cassette Chartering Inc.	Rolande	Navy	South	313-07-0007		
SupplierMaster1007	Shops Dataconnect Inc.	Lothaire	Borkoski	South	313-07-0007		
SupplierMaster1009	Autostyling Disc Co	Dan	Pinkley	West	534-50-0050		
SupplierMaster1027	Telematics Talby Co.	Carla	Ravizee	South	286-07-0007		
SupplierMaster1029	Bending Omega Inc.	Jorhuah	McClaren	South	692-01-0001		
SupplierMaster1033	Paul Groupage Co.	Kory	Deaner	South	659-13-0013		
SupplierMaster1035	Diagnostica Mcclelland Inc.	Manfred	Unibe	South	395-03-0003		
SupplierMaster1048	Sparkies Braude Ltd.	Heliodoro	Crask	West	635-13-0013		
SupplierMaster1054	Compans Ropes Co	Chip	King	West	185-10-0010		
SupplierMaster1058	Marline Homer Co	Leontine	Aust	South	611-64-0064		

Supporting Enhanced Security Using WS02 Identity Server

After saving the settings, the appropriate roles are created and added to the corresponding users in the WS02 Identity Server (WS02 IS).

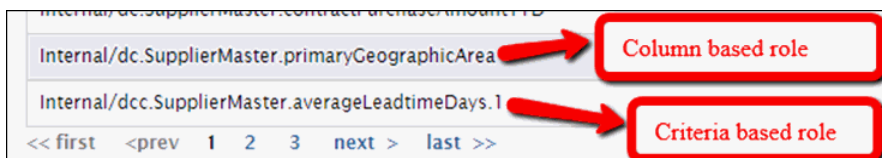
Roles that are defined for column security have the following naming convention:

`Internal/dc.[domainName].[columnName]`

Roles that are defined for criteria/row security have the following naming convention:

`Internal/dcc.[domainName].[columnName].[criteriaValue]`

The following image shows sample security roles in the WS02 IS.



If required, you can create those roles manually in the WS02 IS by following the naming conventions. The corresponding column set(s) will be created in the Administration console.

If a column set is no longer required, you can click the Delete button so that all related column set roles will be deleted from the corresponding users in the WS02 IS.

Note: Created roles will still exist in the WS02 IS, but they will not affect the user interface because they are unassigned.

Merging and Reorganizing Column Sets

Created column sets can automatically be merged into one after refreshing the page, especially if the same columns and/or the same values were selected or entered for different columns sets.

Column sets can be reorganized if, for example, two column sets with the same visible columns were created for different users.

For example, the first column set below, shows the columns selected for the user *PRIMARY/super_a*.

Customer Address

Customer Address Master

Customer Contact

Customer Contact Master

Customer Cust Demographics

Customer Cust Demographics Master

Customer Address

+ Add Column Set

▼ Column set 1

Save Delete

Users

PRIMARY/super_a ×

Show Columns	Show Data
<input checked="" type="checkbox"/> Address _ geo _ area	≡ All
<input type="checkbox"/> Address _ geo _ area Description	≡ All
<input checked="" type="checkbox"/> Address _ geo _ area Id	≡ All
<input checked="" type="checkbox"/> Address _ status	≡ All
<input type="checkbox"/> Address _ status Description	≡ All

The following image shows the second column set, showing the same columns selected for the user *PRIMARY/ds_a*.

Customer Address

Customer Address Master

Customer Contact

Customer Contact Master

Customer Cust Demographics

Customer Cust Demographics Master

Customer Address

+ Add Column Set

▼ Column set 2

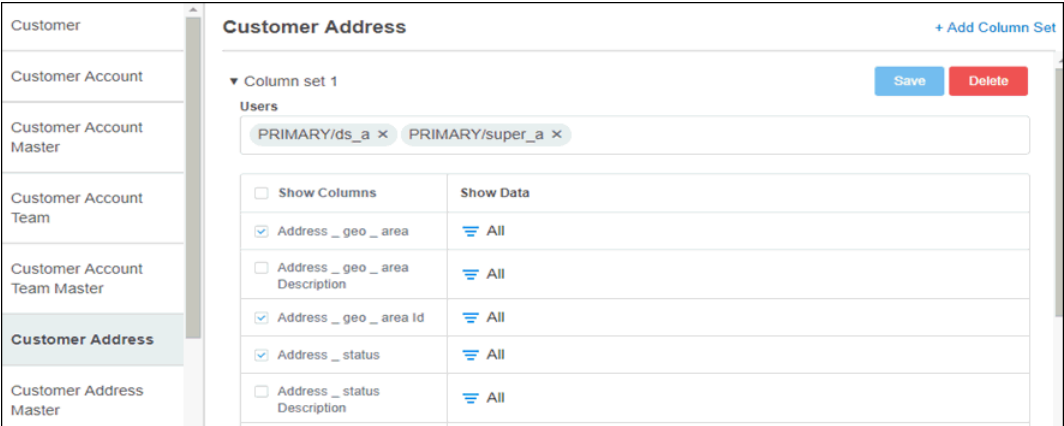
Save Delete

Users

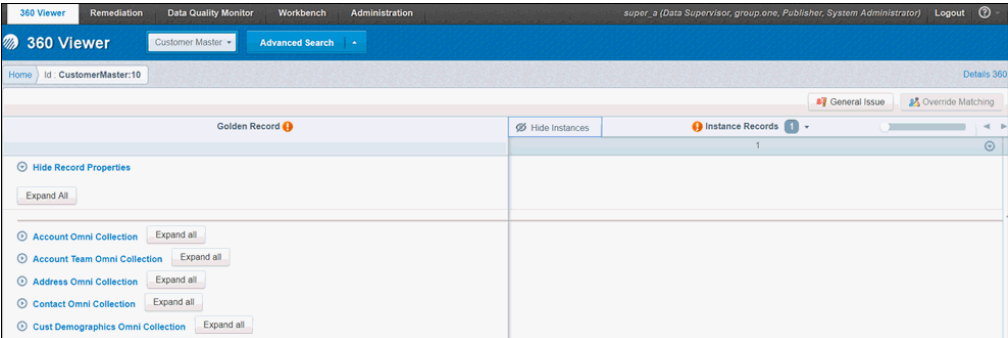
PRIMARY/ds_a ×

Show Columns	Show Data
<input checked="" type="checkbox"/> Address _ geo _ area	≡ All
<input type="checkbox"/> Address _ geo _ area Description	≡ All
<input checked="" type="checkbox"/> Address _ geo _ area Id	≡ All
<input checked="" type="checkbox"/> Address _ status	≡ All

As a result, one column set will be displayed when both users and shared columns are selected, as shown in the following image.



Users are alerted if data access is restricted when an icon containing an exclamation mark in an orange circle is displayed. This notification is displayed on pages with limited access to data, as shown in the following image.



Note that two *data access is limited* notifications appear in the above image. The first notification on the left is for the records in the Golden Records frame (from the Supplier Master table). The second notification on the right is for the records in the Instances frame (from the Supplier Table).

Configuring Single Sign-On

This section describes how to configure Single Sign-On (SSO) for Omni Governance Console (OGC).

In this appendix:

- ☐ [Stopping the OGC Tomcat Service](#)
 - ☐ [Unzipping the Single Sign-On Delivery Package](#)
 - ☐ [Configuring the context.xml Properties File and Creating Backup Files](#)
 - ☐ [Editing the sso.properties File](#)
 - ☐ [Generating Certificates](#)
 - ☐ [Exporting Certificates](#)
 - ☐ [Editing the ogc-sp.xml File With Certificates and Properties](#)
 - ☐ [Configuring the SAML2 Identity Provider \(SiteMinder\)](#)
 - ☐ [Registering the Identity Provider Partnership Information and Certificate From the Identity Provider](#)
 - ☐ [Special Algorithms \(Optional\)](#)
 - ☐ [Restarting Apache Tomcat](#)
 - ☐ [Testing the New SAML2 SSO Sign On Page](#)
-

Stopping the OGC Tomcat Service

Before continuing, ensure that the *OGC Tomcat* service is stopped in the Omni Console, as shown in the following image.



Unzipping the Single Sign-On Delivery Package

The Single Sign-On delivery package consists of two files (*ogc-sp.xml* and *sso.properties*), which are automatically installed into the following subdirectory of your installation:

```
\omnigen\omniGenData\sso
```

Configuring the context.xml Properties File and Creating Backup Files

Navigate to the following directory:

```
\omnigen\OmniGovConsole\conf
```

Verify that the *context.xml* file located in this directory has the following property definition in place, is uncommented, and is consistent with your Omni Governance Console (OGC) installation.

```
<!-- SSO testing -->
<Environment override="true" type="java.lang.String"
value="\omnigen\OmniGenData\sso\sso.properties"
name="ssoConfigPropertiesFile"/>
```

You can also copy this property definition from the *context_snip* file from the SSO delivery location, edit accordingly, and paste it into your *context.xml* file.

If they already exist, create backup copies of the following sso-related files, which are located in the `\omnigen\OmniGenData\sso` directory:

- ☐ `sso.properties`
- ☐ `ogc-sp.xml`

For example, create a backup copy of the *sso.properties* file as *sso.properties.save0402* in the `\omnigen\OmniGenData\sso` directory. Repeat this for the *ogc-sp.xml* file.

Editing the sso.properties File

Navigate to the following directory:

```
\omnigen\OmniGenData\sso
```

The *sso.properties* file that is located in this directory should be structured as follows:

```
active = true (a)
userDomain = ibi (j)
SSO_DOMAIN_1 = PRIMARY (b)
SSO_DOMAIN_2 = iway (b)
SSO_DOMAIN_3 = ibi (b)
keyManager.storeFile = file:/C:\omnigen\omnigendata\sso\wso2carbon.jks (c)
keyManager.storePass = wso2carbon
keyManager.passwords.wso2carbon = wso2carbon (d)
keyManager.passwords.wso2sign = wso2carbon
keyManager.passwords.wso2encr = wso2carbon
keyManager.defaultKey = wso2carbon
metadata.sp.file = \omnigen\omnigendata\sso\ogc-sp.xml (e)
metadata.sp.defaults.local = true
metadata.sp.defaults.alias = test.ibi.com (f)
metadata.sp.defaults.signingKey = wso2sign (g)
metadata.sp.defaults.encryptionKey = wso2encr (h)
metadata.providers.idp = \omnigen\omnigendata\sso\wso2-idp.xml (i)
```

Perform the following steps:

1. Either change the definitions **(j)** and **(b)** in your existing *sso.properties* file, adding the password entries **(d)** for *encr* and *sign* if necessary, and verifying that items **(a)** through **(i)** are correct, or copy the *sso.properties* file from the SSO delivery location, and change the domain names **(j)**, **(b)**, and so on, to reflect your environment.
2. Ensure that the *keyManager.storeFile* value **(c)** above includes the *file:* prefix as per Linux and Windows instances. For example, on Windows:

```
keyManager.storeFile=file:/C:\omnigen\omnigendata\sso
```

3. Verify that the *keyManager.passwords* names (for example, *wso2sign* and *wso2encr*) match the *-alias* values entered when the certificates are being generated. For example:

```
keyManager.passwords.wso2sign = wso2carbon
keyManager.passwords.wso2encr = wso2carbon
```

4. Ensure that the fully qualified path and file name is entered in the following line:

```
metadata.sp.file = \omnigen\omnigendata\sso\ogc-sp.xml
```

5. Ensure that the alias specification **(f)** matches the value of the *EntityId* in the Identify Provider (IdP) (for example, SiteMinder or ADFS) and the alias when specified in the *ogc-sp.xml* file. For example:

```
metadata.sp.defaults.alias = test.ibi.com
```

6. Edit the proper key values **(g)** and **(h)** that will be used in [Generating Certificates](#) on page 124. For example:

```
metadata.sp.defaults.signingKey = wso2sign
metadata.sp.defaults.encryptionKey = wso2encr
```

7. Ensure that the path to the sso-related files and the corresponding file name is correct. For example:

```
metadata.providers.idp = \omnigen\omnigendata\sso\wso2-idp.xml
```

8. Save the *sso.properties* file when you are finished making your changes.

Generating Certificates

To generate certificates:

1. Verify that the *keytool* command is in your path.
2. Use the *keytool* command to generate a new signature processing certificate.
3. Navigate to the \sso subfolder. For example:

```
\omnigen\omnigendata\sso
```

4. Type the following:

```
keytool -genkey -alias wso2sign -keyalg RSA -keysize 2048 -keypass
wso2carbon -storepass wso2carbon -validity 3650 -keystore wso2carbon.jks
```

5. Respond to the questions prompted by the *keytool* command using your site details, as shown in the following example:

```
[iwayqa@iwserv153 security]$ cd $HOME/sso
[iwayqa@iwserv153 sso]$ ls
backup  ogc-sp.xml  sso.properties  wso2carbon.jks  wso2-idp.xml
[iwayqa@iwserv153 sso]$ keytool -genkey -alias wso2sign -keyalg RSA
-keystore wso2carbon.jks
What is your first and last name?
[Unknown]: iwserv153.ibi.com
What is the name of your organizational unit?
[Unknown]: iWay - signing
What is the name of your organization?
[Unknown]: iWay Software
What is the name of your City or Locality?
[Unknown]: New York
What is the name of your State or Province?
[Unknown]: New York
What is the two-letter country code for this unit?
[Unknown]: US
Is CN=iwserv153.ibi.com, OU=iWay - signing, O=iWay Software, L=New York, ST=New York, C=US correct?
[no]: y
[iwayqa@iwserv153 sso]$
```

6. Reply to the question *What is your first and last name?* with your Omni Governance Console (OGC) server's host name (for example, *iwserv153.ibi.com*).

7. Use the `keytool` command to generate a new encryption certificate.
8. From the `\sso` subfolder, type the following:

```
keytool -genkey -alias wso2encr -keyalg RSA -keysize 2048 -keypass
wso2carbon -storepass wso2carbon -validity 3650 -keystore wso2carbon.jks
```

9. Reply to the question *What is your first and last name?* with your Omni Governance Console (OGC) server's host name (for example, `iwserveribi.com`).

```
[iwayqa@iwserv153 sso]$ keytool -genkey -alias wso2encr -keyalg RSA -keysize 2048
-keypass wso2carbon -storepass wso2carbon -validity 3650 -keystore wso2carbon.jks
What is your first and last name?
[Unknown]: iwserver153.ibi.com
What is the name of your organizational unit?
[Unknown]: iWay - encryption
What is the name of your organization?
[Unknown]: iWay Software
What is the name of your City or Locality?
[Unknown]: New York
What is the name of your State or Province?
[Unknown]: New York
What is the two-letter country code for this unit?
[Unknown]: US
Is CN=iwserver153.ibi.com, OU=iWay - encryption, O=iWay Software, L=New York, ST=New York, C=US correct?
[no]: y
[iwayqa@iwserv153 sso]$
```

10. Type the `keytool -list` command, as shown in the following example:

```
[iwayqa@iwserv153 sso]$ keytool -list -keystore wso2carbon.jks -storepass wso2carbon -alias wso2sign
wso2sign, Aug 25, 2016, PrivateKeyEntry,
Certificate fingerprint (SHA1): ED:83:92:58:01:93:B1:EA:1E:E1:26:6B:19:74:AB:3A:00:6D:E2:80
[iwayqa@iwserv153 sso]$ keytool -list -keystore wso2carbon.jks -storepass wso2carbon -alias wso2encr
wso2encr, Aug 25, 2016, PrivateKeyEntry,
Certificate fingerprint (SHA1): 60:F1:11:6D:EA:9B:8A:F5:34:97:FE:1F:E4:C7:14:C1:87:CC:18:CA
```

11. Verify that the certificates are stored in the proper keystore (under `\omnigen\omnigendata\sso`).

Exporting Certificates

To export certificates:

1. Navigate to the `\sso` subfolder. For example:

```
\omnigen\omnigendata\sso
```

2. Type the following:

```
keytool -exportcert -keystore wso2carbon.jks -storepass wso2carbon
-alias wso2sign -file wso2sign.crt -rfc
```

This will generate a certificate in RFC style for signature processing in the `\omnigen\OmniGenData\sso` directory named `wso2sign.crt`.

3. From the \sso subfolder, type the following:

```
keytool -exportcert -keystore wso2carbon.jks -storepass wso2carbon  
-alias wso2encr -file wso2encr.crt -rfc
```

This will generate a certificate in RFC style for encryption processing in the \omnigen
\OmniGenData\sso directory named wso2encr.crt.

Editing the ogc-sp.xml File With Certificates and Properties

To edit the *ogc-sp.xml* file with certificates and properties:

1. Edit the *ogc-sp.xml* file.

The following is a sample *ogc-sp.xml* file for reference.

Note that there are two long, multi-line strings in the `<ds:X509Certificate>` tags. These are the certificates that will be overwritten with the site-specific certificates that were created in [Generating Certificates](#) on page 124. Shortened versions of the certificates are shown in this sample for demonstration purposes. The actual certificates will be much larger.

```

<?xml version="1.0" encoding="UTF-8"?>
<md:EntityDescriptor entityID="test.ibi.com"
xmlns:md="urn:oasis:names:tc:SAML:2.0:metadata">
<md:SPSSODescriptor AuthnRequestsSigned="true"
WantAssertionsSigned="false"
protocolSupportEnumeration="urn:oasis:names:tc:SAML:2.0:protocol">
  <md:Extensions>
    <idpdisco:DiscoveryResponse
xmlns:idpdisco="urn:oasis:names:tc:SAML:profiles:SSO:idp-discovery-
protocol" Binding="urn:oasis:names:tc:SAML:profiles:SSO:idp-discovery-
protocol" Location="http://localhost:8080/spring-security-saml/login/
auth/alias/localhost?disco=true"/>
  </md:Extensions>
  <md:KeyDescriptor use="signing">
    <ds:KeyInfo xmlns:ds="http://www.w3.org/2000/09/xmldsig#">
      <ds:X509Data>
        <ds:X509Certificate>
MIIDoTCCAomgAwIBAgIEf6nJDTANBgkqhkiG9w0BAQsFADCBgDELMAkGA1UEBhMCVVMxETAPB
gNV
Ykym9tOG+m21eC5LgRX+qyfb+XE7OP24N/
ccKYuJkcQdJKnJCFxgdC3xl45EfaEFh5bQ0UOZzzSM
cyNAPOW+qssSOxRJyWbqAE0x3SxE
</ds:X509Certificate>
        </ds:X509Data>
      </ds:KeyInfo>
    </md:KeyDescriptor>
    <md:KeyDescriptor use="encryption">
      <ds:KeyInfo xmlns:ds="http://www.w3.org/2000/09/xmldsig#">
        <ds:X509Data>
          <ds:X509Certificate>
MIIDpzCCAo
+gAwIBAgIEIuaEgzANBgkqhkiG9w0BAQsFADCBgzELMAkGA1UEBhMCVVMxETAPBgNV
0MaUTCLU1X94XcQJQ8zskBLSSw2jrf9rvGzBMHJrTphJG10RluIpJWu0fWFhNRRxq61FwZzRl
53j
5pHGZ2yxcPWefW05qqjX/ZZWkx8rxH/YnTvA
          </ds:X509Certificate>
        </ds:X509Data>
      </ds:KeyInfo>
    </md:KeyDescriptor>
    <md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:
2.0:bindings:HTTP-POST" Location="http://iwserv153.ibi.com:8080/ogc/saml/
SingleLogout/alias/test.ibi.com"/>
    <md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:
2.0:bindings:HTTP-Redirect" Location="http://iwserv153.ibi.com:8080/ogc/
saml/SingleLogout/alias/test.ibi.com"/>
    <md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:
2.0:bindings:SOAP" Location="http://iwserv153.ibi.com:8080/ogc/saml/
logout/SingleLogout/test.ibi.com"/>
    <md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-
format:emailAddress</md:NameIDFormat>
    <md:NameIDFormat>urn:oasis:names:tc:SAML:2.0:nameid-
format:transient</md:NameIDFormat>

```

```
<md:NameIDFormat>urn:oasis:names:tc:SAML:2.0:nameid-format:persistent</md:NameIDFormat>
  <md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:unspecified</md:NameIDFormat>
  <md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:X509SubjectName</md:NameIDFormat>
  <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST" Location="http://iwserv153.ibi.com:8080/ogc/saml/SSO/alias/test.ibi.com" index="0" isDefault="true"/>
  <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Artifact" Location="http://iwserv153.ibi.com:8080/ogc/saml/SSO/alias/test.ibi.com" index="1" isDefault="false"/>
</md:SPSSODescriptor>
</md:EntityDescriptor>
```

2. Navigate to the following directory:

```
\omnigen\omnigendata\sso
```

3. Open the *wso2sign.crt* file.

The long multi-line string between -----BEGIN CERTIFICATE----- and -----END CERTIFICATE----- is the actual certificate . Copy and paste it into the *ogc-sp.xml* file between the `<ds:X509Certificate>` tags, which are below the `<md:KeyDescriptor use="signing">` tag. When pasting, ensure that you overwrite the entire existing string that is currently there.

4. Open the *wso2encr.crt* file from the *\sso* directory.

The long multi-line string between -----BEGIN CERTIFICATE----- and -----END CERTIFICATE----- is the actual certificate . Copy and paste it into the *ogc-sp.xml* file between the `<ds:X509Certificate>` tags, which are below the `<md:KeyDescriptor use="encryption">` tag. When pasting, ensure that you overwrite the entire existing string that is currently there.

5. Still editing the *ogc-sp.xml* file, edit the *EntityID* field, which is located at the top of the file.

Set the value to the value used in the *sso.properties* file. For example:

```
<md:EntityDescriptor entityID="test.ibi.com"
```

6. Edit the five URLs which refer to the *EntityID* field.

There are three `SingleLogoutService` tags and two `AssertionConsumerService` tags.

7. Change all five of the default *test.ibi.com* strings to your *EntityID* value specified in the *sso.properties* file. For example:

```
<md:EntityDescriptor entityID="test.ibi.com"
```

The five strings are located at the bottom of the *ogc-sp.xml* file as follows:


```
<md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:
2.0:bindings:HTTP-POST" Location="http://iwserv153.ibi.com:8080/ogc/saml/
SingleLogout/alias/test.ibi.com"/>
```

```
<md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:
2.0:bindings:HTTP-Redirect" Location="http://iwserv153.ibi.com:8080/ogc/
saml/SingleLogout/alias/test.ibi.com"/>
```

```
<md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:
2.0:bindings:SOAP" Location="http://iwserv153.ibi.com:8080/ogc/saml/
logout/SingleLogout/test.ibi.com"/>
```

```
<md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:
2.0:bindings:HTTP-POST" Location="http://iwserv153.ibi.com:8080/ogc/
saml/SSO/alias/test.ibi.com" index="0" isDefault="true"/>
```

```
<md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:
2.0:bindings:HTTP-Artifact" Location="http://iwserv153.ibi.com:8080/ogc/
saml/SSO/alias/test.ibi.com" index="1" isDefault="false"/>
```

8. In these same URL strings, change the five host name instances (for example, *iwserv153.ibi.com*) to your actual OGC host name that is being used.
9. Save the *ogc-sp.xml* file and give it to the Identity Provider (IdP) administrator.

Configuring the SAML2 Identity Provider (SiteMinder)

The SAML2 Identity Provider (IdP) administrator (or other SAML2 IdP administrator) creates the partnership and returns the partnership *idp.xml* file.

Registering the Identity Provider Partnership Information and Certificate From the Identity Provider

1. Copy the *idp.xml* file received from the SiteMinder Identity Provider (IdP) administrator into the following directory:

```
\omnigen\OmniGenData\sso
```

2. Edit the *sso.properties* file, which is located in the same directory.
3. Change line **(i)** as tagged in [Editing the sso.properties File](#) on page 123, defining *metadata.providers.idp* to the exact, fully qualified file name of the *idp.xml* file that the SiteMinder IdP administrator has provided to you.

For example:

```
metadata.providers.idp = \omnigen\OmniGenData\sso\wso2-idp.xml
```

4. Ensure that the first line in the *sso.properties* file is set as follows:

```
active=true
```

5. Save the *sso.properties* file.

Special Algorithms (Optional)

If the use of special blocking and signing algorithms is required (for example, to support a change of the signing algorithm to RSA with SHA256, and support AES-256 blocking algorithm), then perform the following steps to add the Java Cryptography Extensions *local_policy.jar* and *US_export_policy.war*.

Note: If Java version 1.8 is being used, then skip to step 4.

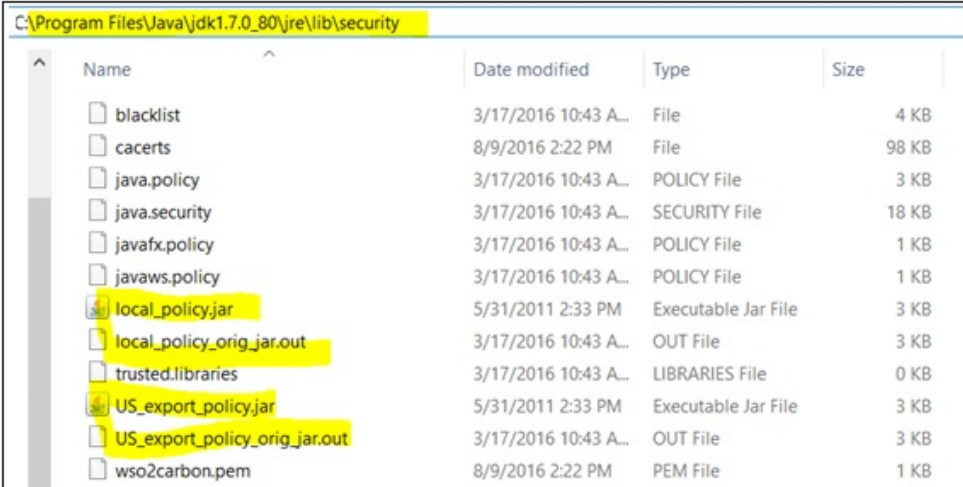
1. In your Java installation (`\jre\lib\security` directory) and in all of the Java installations in use by Omni Governance Console (OGC), SiteMinder Identity Provider (IdP), and the SiteMinder Policy Server (they are most likely already in Java used by the Identity Provider and the Identity Provider's Policy Server):
 - a. Rename the original *local_policy.jar* file to:


```
local_policy_orig_jar.out
```
 - b. Rename the original *US_export_policy.jar* file to:


```
US_export_policy_orig_jar.out
```
2. Download the Java Cryptography Extension (JCE) Unlimited Strength Jurisdiction Policy Files (*local_policy.jar* and *US_export_policy.jar*) directly from the Oracle website, and store them in the following directory of your Java installation:

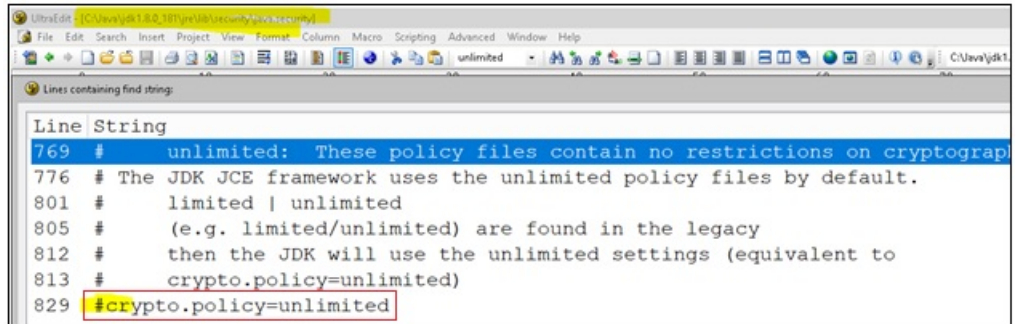
`\jre\lib\security`

For example, you should have a `\security` subfolder that is structured as shown in the following image.



Name	Date modified	Type	Size
blacklist	3/17/2016 10:43 A...	File	4 KB
cacerts	8/9/2016 2:22 PM	File	98 KB
java.policy	3/17/2016 10:43 A...	POLICY File	3 KB
java.security	3/17/2016 10:43 A...	SECURITY File	18 KB
javafx.policy	3/17/2016 10:43 A...	POLICY File	1 KB
javaws.policy	3/17/2016 10:43 A...	POLICY File	1 KB
local_policy.jar	5/31/2011 2:33 PM	Executable Jar File	3 KB
local_policy_orig_jar.out	3/17/2016 10:43 A...	OUT File	3 KB
trusted.libraries	3/17/2016 10:43 A...	LIBRARIES File	0 KB
US_export_policy.jar	5/31/2011 2:33 PM	Executable Jar File	3 KB
US_export_policy_orig_jar.out	3/17/2016 10:43 A...	OUT File	3 KB
wso2carbon.pem	8/9/2016 2:22 PM	PEM File	1 KB

- For Java version 1.8, uncomment the `crypto.policy` setting, which is located in `\java\jdk1.8.0_181\jre\lib\security\java.security`, as shown in the following image.



- Issue a request for the SiteMinder IdP administrator to reconfigure the partnership with the required algorithms, as shown in the following image.



No additional changes to OGC properties or to the generated certificates are required.

Restarting Apache Tomcat

To restart Apache Tomcat:

- Delete or save the log files in the following directory:

`\omnigen\OmniGovConsole\logs`

2. Delete the following `\Work` subfolder and all of its contents:

`\omnigen\OmniGovConsole\Work`

3. Start the *OGC Tomcat* service in the Omni Console.

Testing the New SAML2 SSO Sign On Page

To test the new SAML2 SSO sign on page:

1. From a browser, clear the cache and try to connect and login to Omni Governance Console (OGC) with your regular URL.

Instead of the original Omni Console login page, you should be rerouted to the Identify Provider's (ADFS or SiteMinder) login page.

2. Log in with your SSO credentials.

Using MData, Synch, and WS02 Administration

This appendix describes the WS02/MData Synchronization (Mdata-Synch) feature of reducing the configuration work of the administrator when a new subject arrives into the Omni Server model and database, and when data structures are altered (for example, a type or name of a column has been changed). The whole synchronization process has been reduced to double-clicking on the OGC Administration Panel while allowing you to do some basic customization to the synchronization process.

Previously, all users had to go through a set of manual steps in the OGC Administration Panel and in several WS02 IS Administration panels to make the OGC application consistent with the change(s) made to the data structure.

In this appendix:

- ☐ [Functional Overview](#)
 - ☐ [Using the WS02/MData-Synchronization Feature](#)
-

Functional Overview

MData-Synch consists of the following parts:

- ☐ Interaction with OmniDomain to synchronize the internal data structure (referred to as MData) of OGC.
- ☐ Interaction with WS02 to synchronize permissive mechanisms of the OGC application.

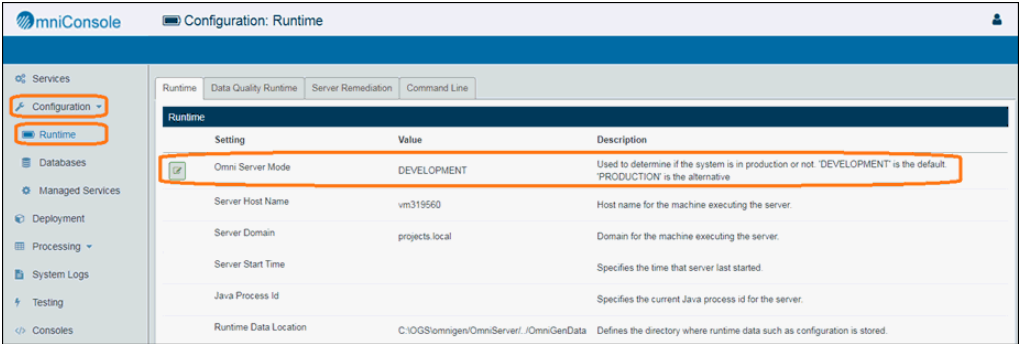
Using the WS02/MData-Synchronization Feature

This section describes the prerequisites and synchronization usage of the WS02/MData feature.

Configuring Omni Server Mode

This section describes how configure the Omni Server Mode setting in the Omni Server.

The synchronization functionality is intended for use only in OGS DEVELOPMENT mode, where you must configure the Omni Server Mode setting to *DEVELOPMENT*, as shown in the following image.



Note: If the OGS is unresponsive (for example, it is not started or in error), the Sync functionality is disabled.

Using the Synchronization

When a new model contains a new subject(s), or a change to the structure of a current subject, a synchronization between the updated data structure and the structure previously existing in OGC is required.

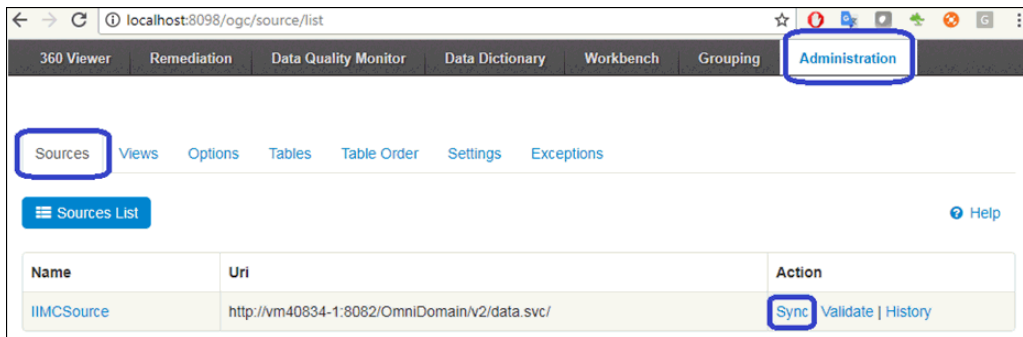
Initialization of the synchronization process is performed using OGC and consists of the following parts:

- ❑ Analysis for the sync (and optional customization)
- ❑ Actual synchronization using the results of the analysis

The following procedure shows a sample workflow of actions for a user to accomplish the synchronization.

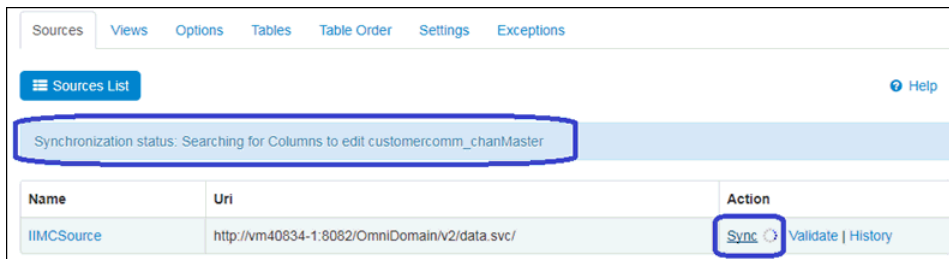
Step 1: Initializing the Analysis for the Synchronization Process.

Using your browser, connect to the OGC Logon page, log on with the credentials containing the System_Administrator role, and then navigate to the Sources tab from Administration, and click the Sync link, as shown in the following image.



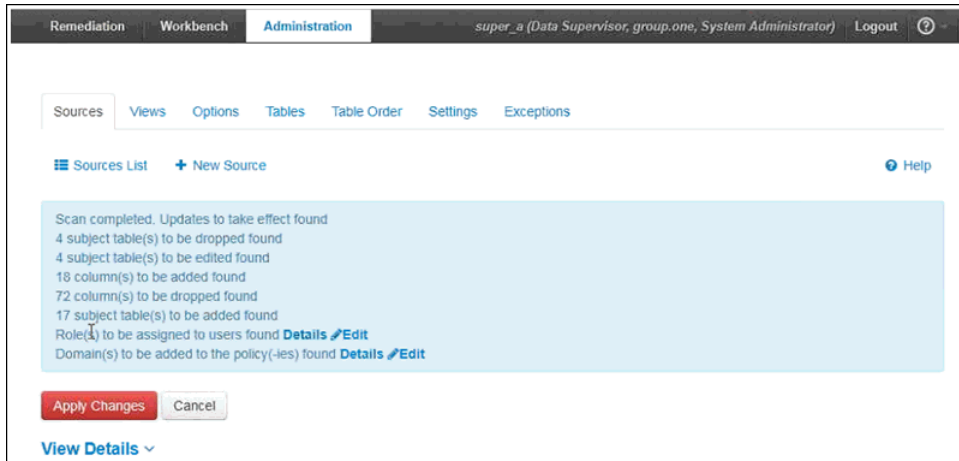
Step 2: Analyzing the Progress.

The analysis for the synchronization process begins, where the status bar displays the dynamic progress of the status, as shown in the following image.



Step 3: Summarizing the Analysis.

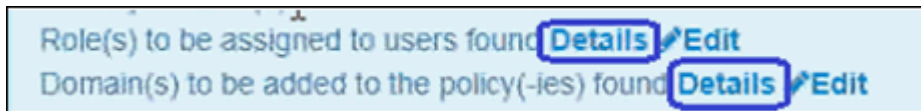
After the analysis is complete, a summary on the proposed synchronization appears, as shown in the following image.



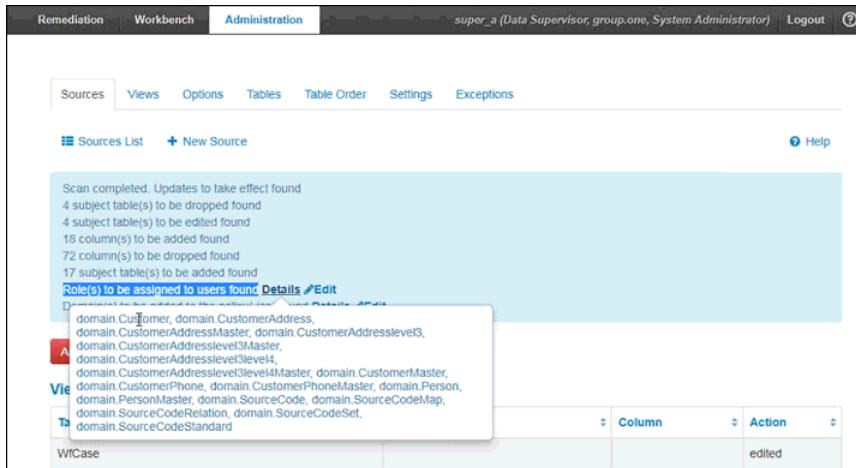
Step 4: Viewing the Details of the Analysis.

You can view the details on the potential update by expanding the *View Details* link.

Note: *View Details* refers only to the action modifying the OGC MData structure. To view the details for WS02 modification, click the *Details* link near the respective summary items, as shown in the following image.



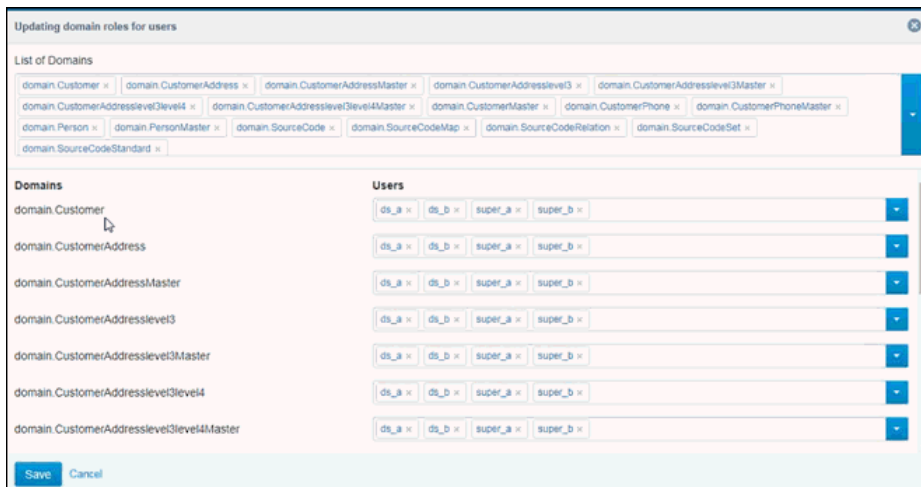
The following image shows a sample entry after clicking *Details* from *Role(s) to be assigned to users found*.



Step 5: Customizing Roles or Users to be Synchronized (Optional)

By default, four users (*ds_a*, *ds_b*, *super_a*, and *super_b*) are granted all the new domain roles (for example, permission to access the new domains or subjects).

To customize those defaults, click *Edit*. A dialog allowing refinement of the assigned domain roles appears. The user can then add or remove new domain roles and users, as well as the relations between them, as shown in the following image.



Step 6: Customizing Policies to be Updated (Optional)

By default, each new domain role will be added to all the role sections in policies.

To change the default settings, click *Edit*. A dialog defining which domain roles will refer to what role sections in all policies appears. The user can match the new domain roles to the regular roles, as shown in the following image.

Updating policies

New Domains to add

Customer

CustomerAddress

CustomerAddressMaster

CustomerAddresslevel3

CustomerAddresslevel3Master

CustomerAddresslevel3level4

CustomerAddresslevel3level4Master

CustomerMaster

CustomerPhone

CustomerPhoneMaster

Person

PersonMaster

SourceCode

SourceCodeMap

SourceCodeRelation

SourceCodeSet

SourceCodeStandard

New Domains to add

Customer

CustomerAddress

CustomerAddressMaster

CustomerAddresslevel3

CustomerAddresslevel3Master

CustomerAddresslevel3level4

CustomerAddresslevel3level4Master

Domain roles

Data_Steward

Data_Supervisor

System_Administrator

User

Data_Steward

Data_Supervisor

System_Administrator

User

Data_Steward

Data_Supervisor

System_Administrator

User

Data_Steward

Data_Supervisor

System_Administrator

User

Data_Steward

Data_Supervisor

System_Administrator

User

Data_Steward

Data_Supervisor

System_Administrator

User

Save

Cancel

Step 7: Executing the Synchronization

To start the actual synchronization process, click *Apply Changes*.

A Loading message appears, as shown in the following image.

RemediationWorkbenchAdministration

super_a (Data Supervisor, group.one, System Administrator)Logout?

SourcesViewsOptionsTablesTable OrderSettingsExceptions

Sources List+ New SourceHelp

Screen completed. Updates to take effect found

4 subject table(s) to be dropped found

4 subject table(s) to be edited found

18 column(s) to be added found

72 column(s) to be dropped found

17 subject table(s) to be added found

Role(s) to be assigned to users found [Details](#) [Edit](#)

Domain(s) to be added to the policy(-ies) found [Details](#) [Edit](#)

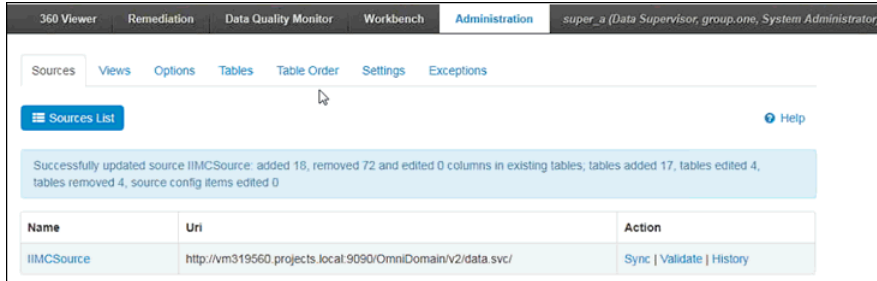
Loading...

Apply ChangesCancel

View Details

Step 8: Summarizing the Synchronization

When the synchronization is complete, a summary appears displaying the synchronization details, as shown in the following image.



The OGC Application should now be completely in sync with the new OGS data structure, and fully functional in using the new data.

Developer Environment Considerations

When using the synchronization functionality from a developer environment (for example, IntelliJ IDEA, Eclipse, and so on) with OGS deployed on secured gateway (HTTPS), the configuration of SSL certificates should take place as described in this section.

Note: The following procedure should be performed *only* if you are running it in your integrated development environment (IDE).

1. Add the new VM argument to your running configuration. For example:

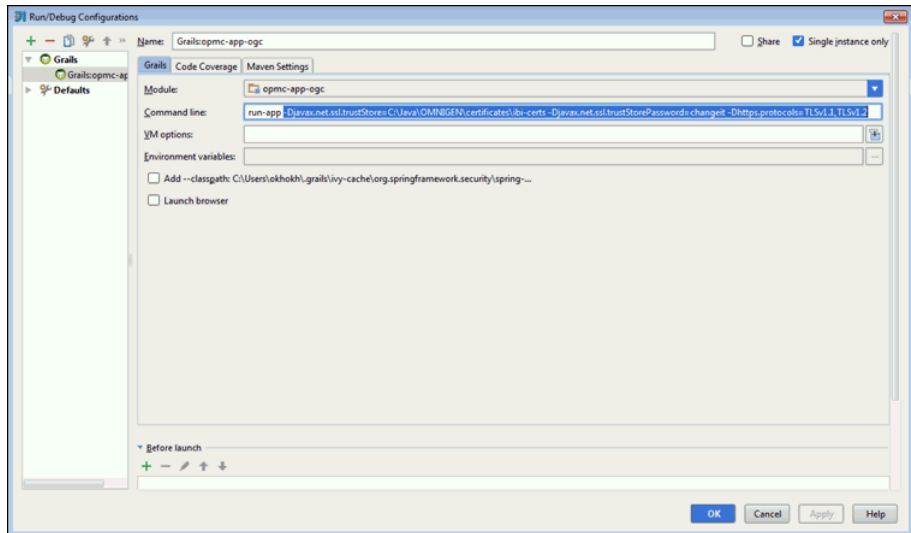
```
-Djavax.net.ssl.trustStore=[path_to_certificates]\ibi-certs -
Djavax.net.ssl.trustStorePassword=changeit -
Dhttps.protocols=TLSv1.1,TLSv1.2
```

where:

ibi-certs

Is the name of the key storage.

2. Open *Run\Debug Configurations* and append the new arguments to the Command line field, as shown in the following image.



3. Copy the required certificate from the OGS location to your computer. For example:

```
..\[OGS_HOME_DIR]\omnigen\OmniGenData
```

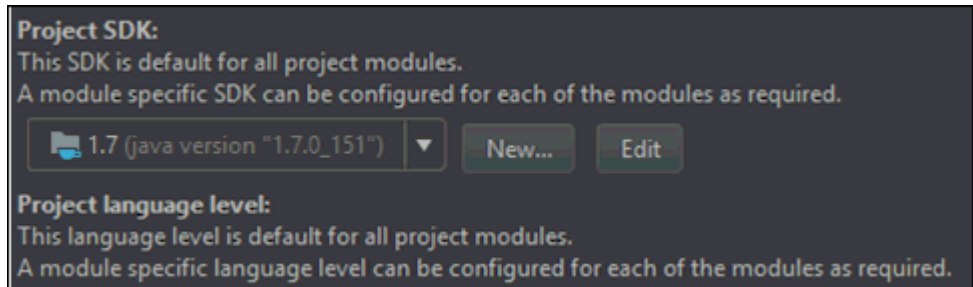
Ensure that the following files are copied:

- ☐ ibi-certs
- ☐ omnigenstore
- ☐ omnigenstore.pem

Note: The certificate can change from time to time. If this happens, you must update them.

4. You must install JDK 1.7 with an update higher than 99, otherwise requests will fail even with correct certificates.

5. After installation is complete, open *File*, select *ProjectStructure*, and then ensure that Project SDK is configured to the proper location, as shown in the following image.



Configuring Omni Governance Console Roles From LDAP (Active Directory)

This appendix describes how to configure a WS02 based LDAP connection and User Store which will eliminate the redundant data entry, and allow the Subject per Userid Authorizations to be obtained from the enterprise LDAP Server (Active Directory).

In this appendix:

- ☐ [Overview](#)
- ☐ [Prerequisites](#)
- ☐ [Enabling Authorization Permission From OGC Using Group Names Through LDAP](#)
- ☐ [Using the Active Directory \(LDAP Server\) System](#)
- ☐ [Testing Logons to Omni Governance Console \(OGC\)](#)

Overview

The following sections detail how to configure a WS02 based LDAP connection and User Store, which eliminates the redundant data entry, and allows the Subject per UserID Authorizations to be obtained from your enterprise LDAP Server (Active Directory).

Prerequisites

The following list describes the prerequisites prior to configuring the OGC roles from LDAP.

- ☐ The username and password of an authorized LDAP user.
- ☐ The LDAP parameter values on your LDAP server, equivalent to the parameters on the Add New User Store form, for a typical MS Active Directory system, as shown in the following section.

Enabling Authorization Permission From OGC Using Group Names Through LDAP

This section describes how to enable authorization permission from OGC using Group Names through LDAP.

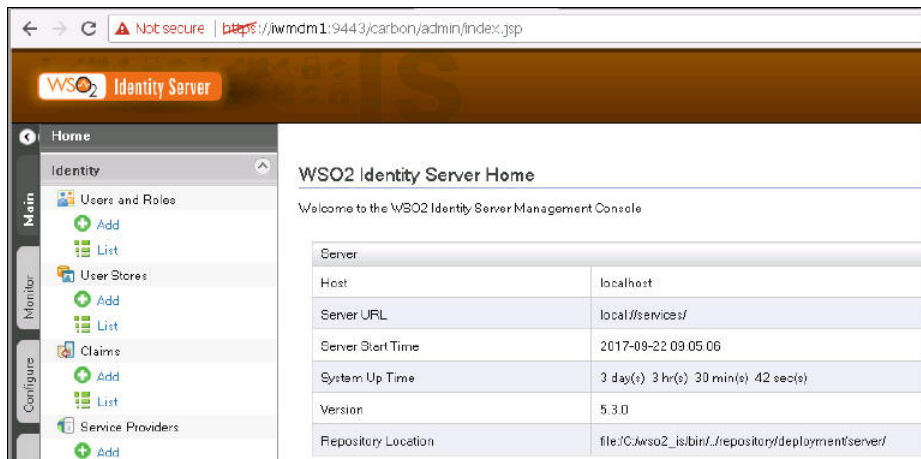
Procedure: How to Enable Authorization Permission from OGC Using Group Names Through LDAP

1. Connect to the WS02_IS system administration console. For example:

<https://your-wso2hostname:9443>

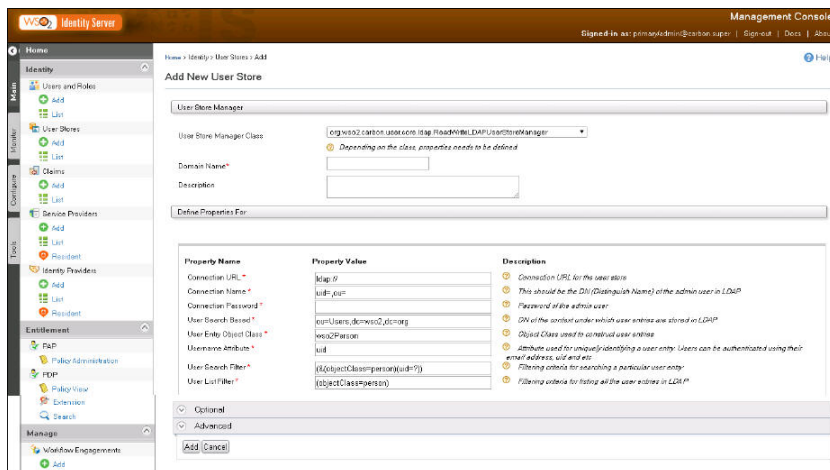
- From the WSO2 homepage, log on with the WSO2_IS username and password of the administrator.

The WS02 Identity Server opens, as shown in the following image.



- Click the Main tab at the left edge of the window.
- Click *Identity*, select *User Stores*, and then click *Add*.

The Add New User Store window appears, as shown in the following image.



- Complete the fields in the Property Value section.

Note: The example below is based on configuring an LDAP connection to an MS Active Directory server.

6. Change the User Store Manager Class drop-down list to:

`org.wso2.carbon.user.core.ldap.ReadOnlyLDAPUserStoreManager`

7. In the Domain Name field, enter a value for your domain name of your user name (for example, OGCUSERS).

Note: This domain name will be used by all users logging in to OGC. Their user names will be entered as:

`OGCUSERS/corporate_userid`

8. Enter the equivalents from the table below as defined on your Active Directory system.

Parameter	Value
Connection URL*	<code>ldap://iwadc-vm.iwaydev.ibi.com:389</code>
Connection Name*	<code>CN=Administrator,CN=Users,DC=iwaydev,DC=ibi,DC=com</code>
Connection Password*	<code>(Enter this last!)</code>
User Search Base*	<code>CN=Users,DC=iwaydev,DC=ibi,DC=com</code>
Username Attribute*	<code>sAMAccountName</code>
User Search Filter*	<code>(&(objectClass=user) (sAMAccountName=?))</code>
User List Filter*	<code>(&(objectClass=user) (memberOf=CN=OGCUSERS,CN=Users,DC=iwaydev,DC=ibi,DC=com))</code>

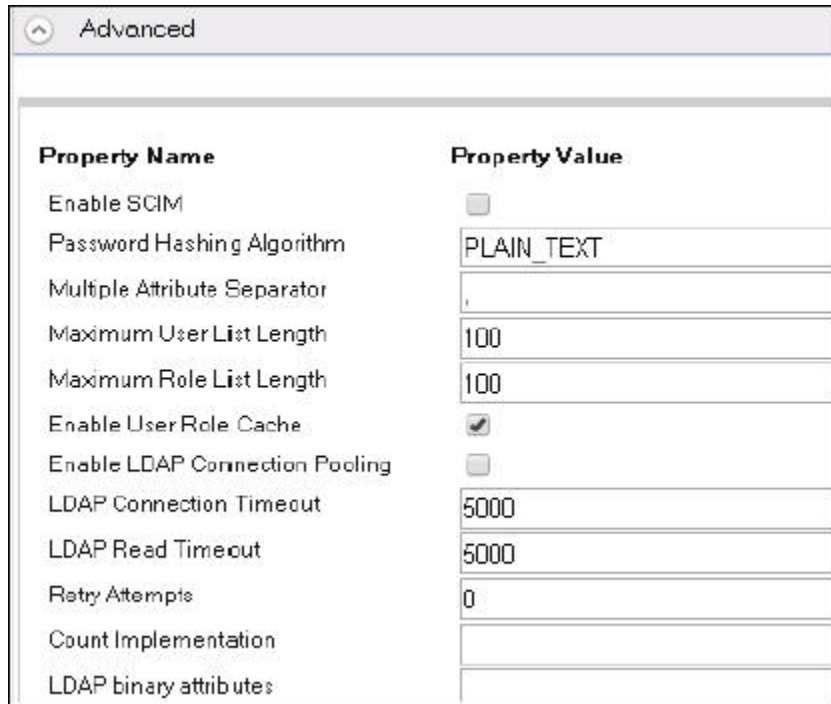
Note: An asterisk denotes a required field.

9. Expand *Optional* and then enter the following values into the corresponding fields:

Parameter	Value
User DN Pattern	(Nothing, leave blank)

Parameter	Value
Display name attribute	sAMAccountName
Read Groups	Select the check box.
Group Search Base	CN=Users,DC=iwaydev,DC=ibi,DC=com
Group Name attribute	cn
Group Search Filter	(&(objectClass=group)(cn=?))
Group List Filter	(objectClass=group)
Role DN Pattern	(Nothing, leave blank)
Membership Attribute	member
Member of Attribute	(Nothing, leave blank)
Enable Escape Characters at User Login	Select the check box.

10. Leave the Advanced section as is, as shown in the following image.



Property Name	Property Value
Enable SCIM	<input type="checkbox"/>
Password Hashing Algorithm	PLAIN_TEXT
Multiple Attribute Separator	,
Maximum User List Length	100
Maximum Role List Length	100
Enable User Role Cache	<input checked="" type="checkbox"/>
Enable LDAP Connection Pooling	<input type="checkbox"/>
LDAP Connection Timeout	5000
LDAP Read Timeout	5000
Retry Attempts	0
Count Implementation	
LDAP binary attributes	

11. Enter the password in the Connection Password field.
12. Scroll down to the bottom of the form and click *Add*.
13. Confirm the information that appears in the User Stores are being Updated pop-up window.
14. Click the *Main* tab, select *User Stores*, and then click *List*.

The new User Store Name (for example, OGCUSERS) appears.

15. Click *Users*.

The new User Store Name also appears in the ALL USER STORE DOMAINS drop-down list, as well as the new domain users with the User Store name prefix which are listed in the name list.

Using the Active Directory (LDAP Server) System

The following example uses Object names and LDAP parameters as used in a Microsoft Active Directory system. The LDAP server administrator must know the corresponding Object names when using a non-MS Active Delivery system.

1. Use Remote Desktop to access your Active Directory host (for example, to wadc-vm.iwaydev.ibi.com), and log on using your LDAP-Administrator user name and password.

For example:

☐ Username: **Administrator**

☐ Password: **(LDAP authorized Password)**

2. Click *Start*, select *Administrative Tools*, and then click *Active Directory Users and Computers*.
3. Identify the corporate or privileged UserName and proceed to *Create Groups in Active Directory*.

If you do not have a corporate UserName, you must create one by performing the following steps:

- a. From the Active Directory Navigation Bar on the left pane, right-click *Users*, select *New*, and click *Users*.

- b. Enter the required information in the First name, Last Name, Full name, and User login name fields, as shown in the following image.

The screenshot shows the 'New Object - User' dialog box. At the top, it says 'Create in: iwaydev.ibi.com/Users'. Below this, there are several input fields: 'First name' with 'Larry', 'Initials' (empty), 'Last name' with 'Supera', 'Full name' with 'Larry Supera', 'User login name' with 'lsupera1' and a dropdown menu showing '@iwaydev.ibi.com', and 'User login name (pre-Windows 2000)' with 'IWAYDEV\' and 'lsupera1'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted.

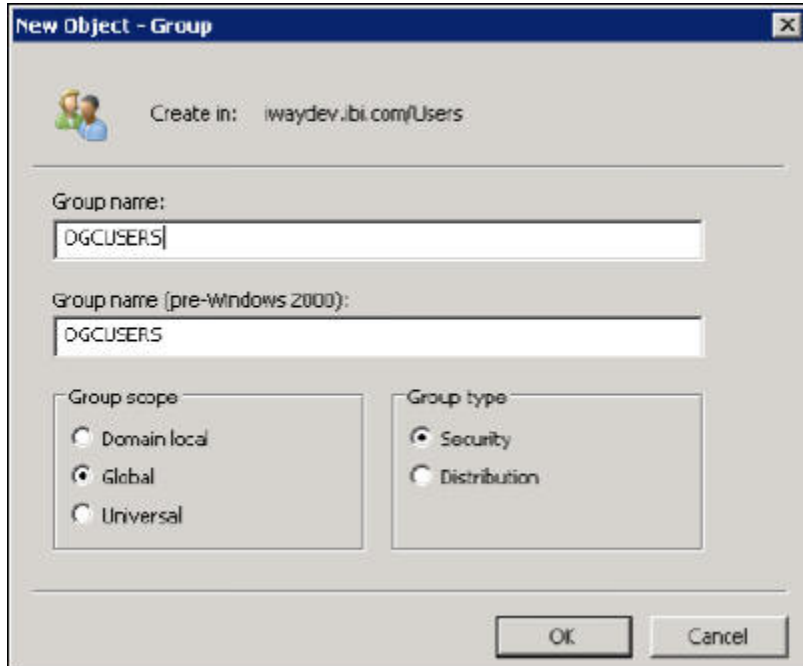
- c. Click *Next*.
- d. Enter and confirm the password, clear the *User must change password* check box, and select the *Password never expires* check box.
- e. Click *Next*, and then click *Finish*.

Procedure: How to Create Groups in Active Directory

To create groups in the Active Directory, perform the following one-time steps:

1. Right-click *Users*, select *New*, and then click *Group*.
2. Enter the Group name or use the same name as your LDAP connection (for example, OGCUSERS).
3. In the Group scope section, select the *Global* radio button.

4. In the Group type section, select the *Security* radio button.



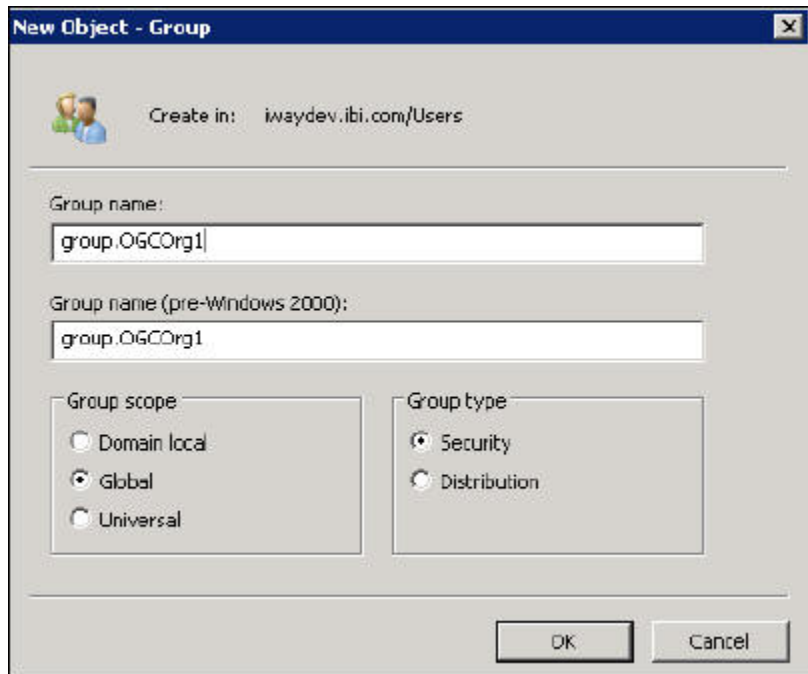
5. Click *OK*.
6. Repeat steps 1 - 5 for each of the following group names:
 - ☐ Data_Supervisor
 - ☐ Data_Steward
 - ☐ User
 - ☐ System_Administrator
7. If your OmniGen Model includes the Customer subject, repeat steps 1 - 5 for each of the following group names:
 - ☐ domain.Customer
 - ☐ domain.CustomerMaster
8. Repeat the two domain.group creations for each Mastered subject in your OmniGen Model.
For example, if Subject = Vendors, then create the groups domain.Vendors and domain.VendorsMaster.

9. Create the Supervisor and Steward Group(s).

The hierarchical Supervisor & Steward Remediation Case resolution featured in OGC allows for a Data_Steward to resolve a case, at which time the case is automatically reassigned to that Data_Supervisor of the Steward for Approval and Closure.

If you are not using this feature, proceed to step 10. Otherwise, if you will use the hierarchical Supervisor and Steward Remediation Case resolution feature in OGC, you must create an OGC-Org Group for each group by performing the following steps:

- a. Create a group (for example, group.OGCOrg1), as shown in the following image.

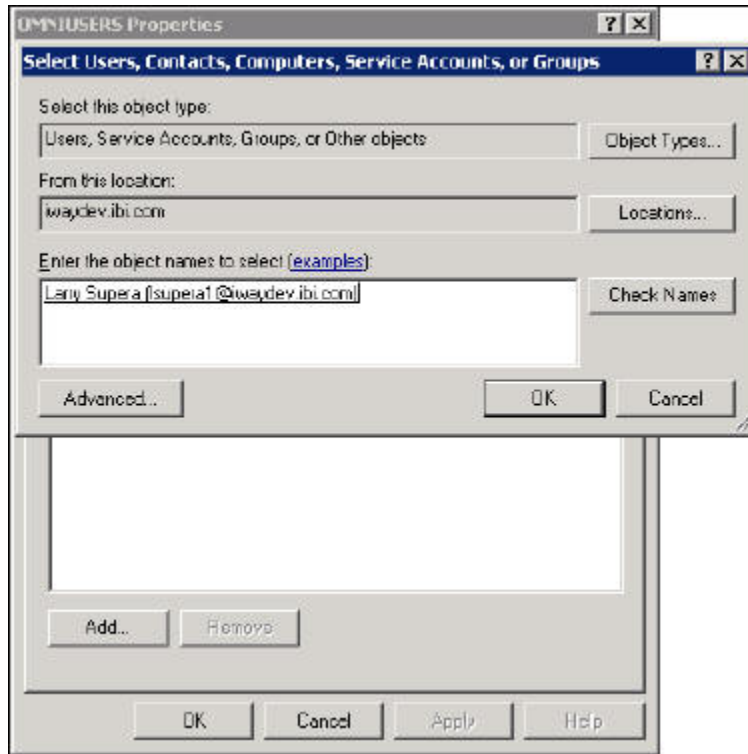


- b. Repeat the above step for Creating (AD) groups for as many Data_Supervisor with Data_Steward(s) groups (or teams) that exist.
10. Designate the user to be a member of the Omni Users Group whose members will be allowed to log on to OGC. For example, make the user a member of the OGCUSERS group.

To designate a user:

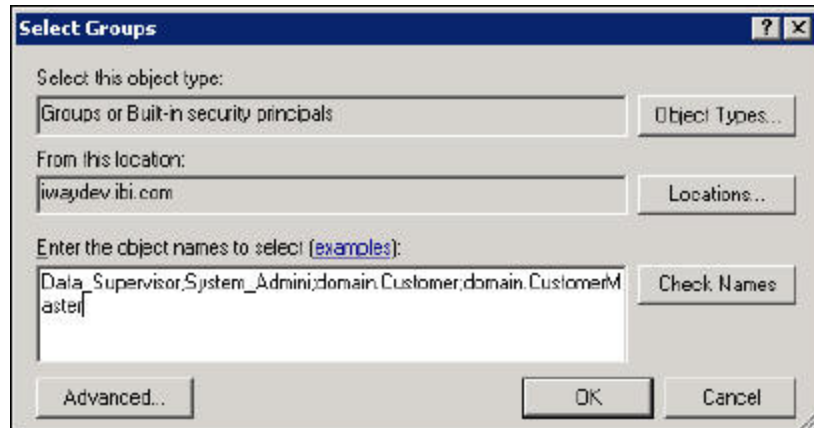
- a. Right-click *OGCUSERS*, select *Properties*, and then click *Members*.
- b. Click *Add*.
- c. Enter the first name or Login ID into the *Enter the object names to select* field.

- d. Click *Check Names*, as shown in the following image.



- e. Click *OK*.
- f. Click *Apply*, then click *OK*.

You can add the user to multiple Groups by separating them with a semi-colon, as shown in the following image.



11. Within the Omni Users Group, designate a user to be a member of only *one* of the following three groups:
 - ☐ Data_Supervisor
 - ☐ Data_Steward
 - ☐ User
12. If the user is to be an OGC_Administrator (and has the Administration tab on their own OGC menu), designate that user a member of the System_Administration group. Otherwise, proceed to the next step.
13. Designate the user to be a member of both domain groups for each subject they can access.

For example, designate them to be a member of domain.CustomerMaster for access to the Customer Master records, and a member of domain.Customer to grant access to Customer Instance records.

For instance, if the user is to have access to Vendors, designate that user to be a member of domain.Vendors and of domain.VendorsMaster, and so on.

Note: If you are using the Supervisor or Steward(s) groups, perform the following steps as many times as necessary.

- a. Designate only *one* Data_Supervisor (a user who is a member of the Data_Supervisor group) a member of group.OCGOrg1.

- b. Designate *all Data_Stewards who are supervised* by the Data_Supervisor above, a member of the Data_Supervisor's Group (for example, a member of group.OGCOrg1).

Testing Logons to Omni Governance Console (OGC)

This section describes how to test logons to OGC after creating OGC roles from LDAP.

Procedure: How to Test Logons to OGC

To test your logon of OGC:

1. Connect to OGC by entering the following into your browser:
<http://yourhostname:9090/ogc>
2. Perform the following test 1.
 - a. Enter your username and password credentials. For example:
Username: **UserSuperv1**
Password: **PassSuperv123**
 - b. Verify that the 360 Viewer, Remediation, and Administration consoles are shown.
 - c. Verify that the 360 Viewer shows the Customer Master records.
3. Perform the following test 2.
 - a. Enter your username and password credentials. For example:
Username: **UserSuperv1**
Password: **PassSuperv123**
 - b. Verify that the 360 Viewer and Remediation consoles are shown, but not the Administration console.
 - c. Verify that the 360 Viewer shows the Customer Master records.



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Information Builders, Inc.
Two Penn Plaza
New York, NY 10121-2898