Information Builders

iWay

Omni-Insurance Omni Governance Console User's Guide

Version 3.12

May 26, 2020

Contents

Preface

This documentation provides the configuration instructions for the Omni Governance Console for Omni-Insurance, 360 Viewer, and Remediation Portal. The 360 Viewer provides a browser-based comprehensive view of the Golden records mastered across Domains (for example, Party). The Remediation Portal is a browser-based, end-to-end comprehensive data remediation tool for manually resolving data mastering issues. This manual is intended for developers and administrators of Master Data Management (MDM) solutions.

How This Manual Is Organized

This manual includes the following chapters:

	Chapter/Appendix	Contents
1	Introducing the Omni Governance Console	Provides an introduction to the Omni Governance Console (OGC).
2	Available Pages in the 360 Viewer	Describes how to use the available pages in the Omni Governance Console (OGC) 360 Viewer.
3	Available Pages in the Remediation Portal	Describes the available pages in the Omni Governance Console (OGC) Remediation Portal.
4	Configuring the Remediation Portal	Describes how to configure the Omni Governance Console (OGC) Remediation Portal.
A	Using the Administration Console	Describes how to use the Administration Console to configure administrative properties and functions that are reflected in the Omni Governance Console (OGC) 360 Viewer.
B	Configuring Omni Governance Console Roles From LDAP (Active Directory)	Describes how to configure a WSO2 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.
underscore	Indicates a default setting.
Key + Key	Indicates keys that you must press simultaneously.
{}	Indicates two or three choices. Type one of them, not the braces.
|	Separates mutually exclusive choices in syntax. Type one of them, not the symbol.
...	Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis (...).
. . .	Indicates that there are (or could be) intervening or additional commands.

Related Publications

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

Customer Support

Do you have questions about this product?

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

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

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

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

Help Us to Serve You Better

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

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

Platform	
Operating System	
OS Version	
JVM Vendor	
JVM Version	

The following table lists 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 messages.	
Any change in the application environment: software configuration, EIS/database configuration, application, and so forth?	
Under what circumstance does the problem *not* occur?	

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

- ❑ Input documents (XML instance, XML schema, non-XML documents)
- ❑ Transformation files
- ❑ Error screen shots
- ❑ Error output files
- ❑ Trace files
- ❑ Custom functions and agents in use
- ❑ Diagnostic Zip
- ❑ Transaction log

User Feedback

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

Thank you, in advance, for your comments.

iWay Software Training and Professional Services

Interested in training? Our Education Department offers a wide variety of training courses for iWay Software and other Information Builders products.

For information on course descriptions, locations, and dates, or to register for classes, visit our website, *http://education.informationbuilders.com*, or call (800) 969-INFO to speak to an Education Representative.

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

Chapter 1

Introducing the Omni Governance Console

This section provides an introduction to the Omni Governance Console (OGC).

In this chapter:

Overview

The Omni Governance Console (OGC) enables business users and data stewards to support their organization's data governance procedures with the ability to view, monitor, compare, and report on mission-critical data, identify and address faulty information, and create a complete, historical web-based view of mastered golden records.

OGC provides an **Administration Console** that can be used to view and edit configuration details (metadata). The **360 Viewer**, which provides a complete view of golden records across all domains, enabling business users and data stewards to quickly locate and examine golden records, view how they are composed, and the history of instances which comprise the master over time. The **Remediation Portal,** which provides the data governance facility for end-to-end support of users to manage data quality and poor quality matches that require human intervention, as well as the means to update invalid or incomplete data.

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	❑ Windows 2016, Windows 2012, Windows 10

Client Component	Version
Web Browser	❑ Microsoft Edge ❑ Internet Explorer 11 ❑ Mozilla Firefox: Latest available version ❑ Google Chrome: Latest available version

360 Viewer

The 360 Viewer is a component of the Omni Governance Console (OGC) that provides a browser-based comprehensive view of the Golden records mastered across Domains (for example, Party).

The 360 Viewer is available only as a post-login activity for OGC. All users must first be authenticated and authorized (with roles and privileges) before obtaining access to the viewer.

The 360 Viewer is a Groovy/Grails web application that can be deployed to any compatible application server.

Main operations which can be performed in the 360 Viewer include:

- View list of domain Golden records.
- Conduct domain advanced search among Golden and Instance records.
- View domain Golden record details.
- View and compare Golden record and supporting Instance records.
- View subdomain records related to the Golden record.
- Compare Instance record with the Source record.

Remediation Portal

The Remediation Portal is a component of the Omni Governance Console (OGC) that provides a browser-based, end-to-end comprehensive data remediation tool for manually resolving and reporting data issues, including data cleansing issues, record inconsistency issues, and master data management merges. The Remediation Portal component allows data stewards and data supervisors to resolve various data quality defects.

The Remediation Portal is available only as a post-login activity for OGC. All users must first be authenticated and authorized (with roles and privileges) before obtaining access to the Remediation Portal.

Main operations which can be performed in the Remediation Portal include:

- Creating and working with General Issue cases.
- Creating and working with Manual Cleansing cases.
- Creating and working with Override Matching cases.
- Viewing the list of all cases created in the system (according to user's permissions).
- Reassigning cases among users.

Chapter 2

Available Pages in the 360 Viewer

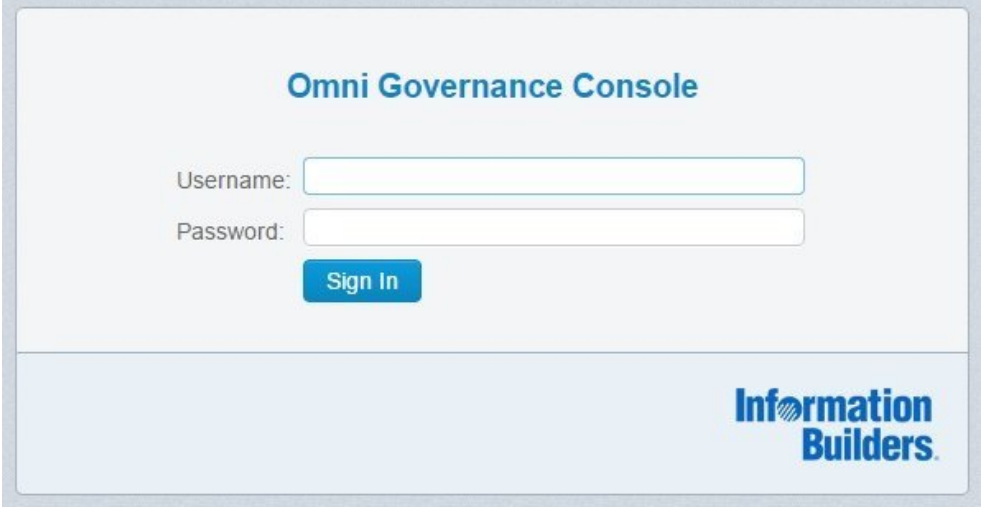
This chapter describes how to use the available pages in the Omni Governance Console (OGC) 360 Viewer.

In this chapter:

Sign In Page

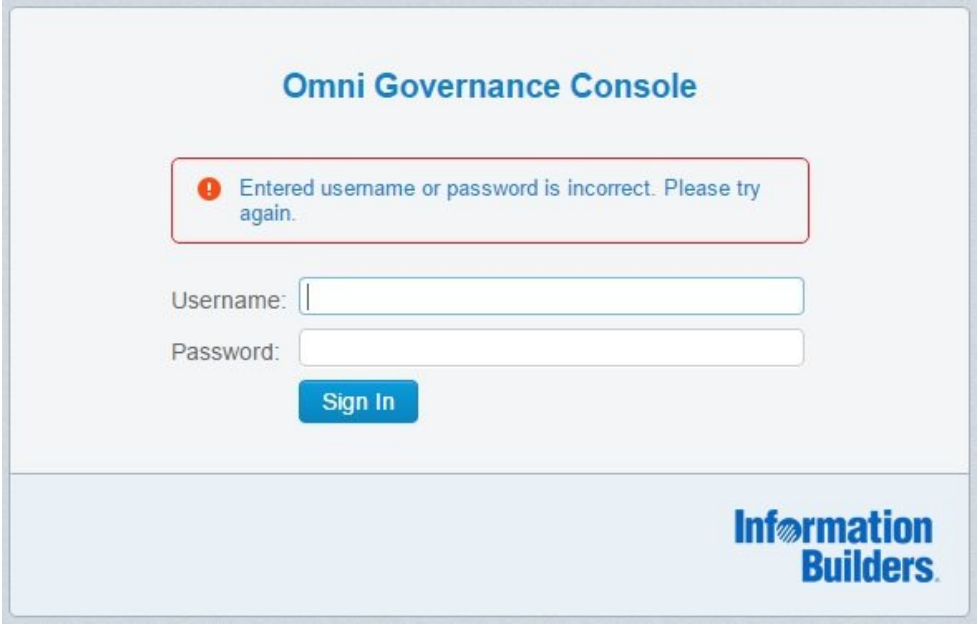
All users of the 360 Viewer are required to sign in using a valid user name and password to configure and use the application.

The following image shows the sign in page of Omni Governance Console (OGC) that is displayed.



If a valid user name and password is provided during the sign in attempt, you are automatically redirected to the Home page.

If an invalid user name or password is provided during the sign in attempt, a message indicating that invalid credentials were entered, as shown in the following image.



Omni Governance Console (OGC) Menu

The Omni Governance Console (OGC) menu has different components for unauthenticated users (guests) and authenticated users.

The OGC menu for unauthenticated users contains:

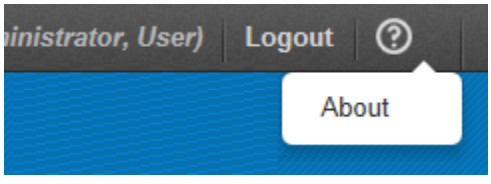
- Login button
- About drop-down menu

The OGC menu for authenticated users contains:

- The OGC component buttons.
- Current user details (user name and role in the brackets)

- Logout button
- About drop-down menu

The About drop-down menu allows you to access the About dialog.

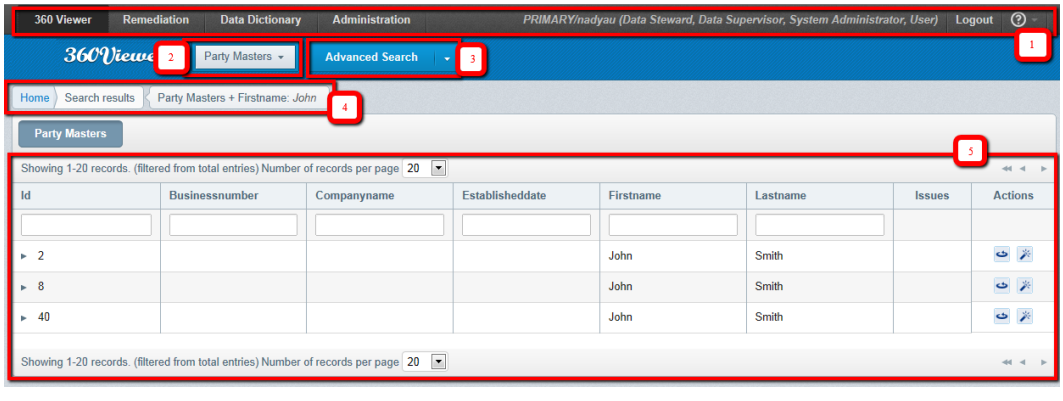


The About dialog contains information about the source, builds, and database versions.

Once you have logged on, you can log out when access is no longer needed. To perform this step, click the **Logout** button that is represented in the right top corner on every page for authenticated users. You will then be redirected to the Sign in page.

Home Page

After logging into the application, you are redirected to the Home page (Domain Main page), as shown in the following image.



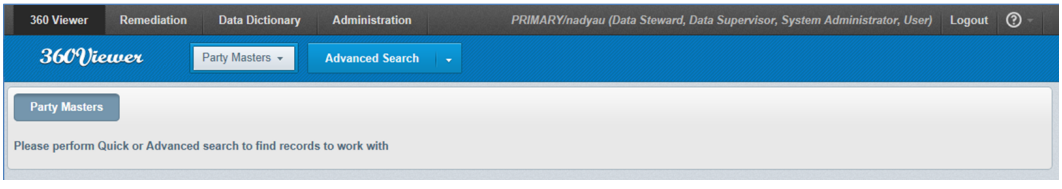
The Home page contains the following areas:

1. OGC menu.
2. Domain drop-down list that allows you to select a required domain to work with.
3. Advanced Search button to open the Search dialog.
4. Breadcrumb trail, which allows you to keep track of your navigation within the application. You can click on a breadcrumb item to be redirected to this previously visited page.

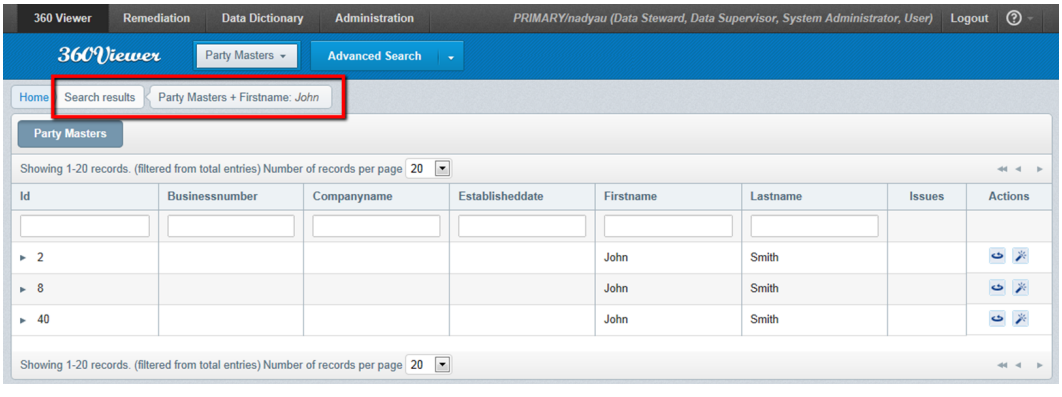
5. Grid with Golden records.

The default state of the Home page can be configured to display a list of domain records or without displaying a list of domain records. For more information, see *Using the Administration Console* on page 133.

If the default state of the Home page is configured not to display a list of domain records, then the Home page appears, as shown in the following image.



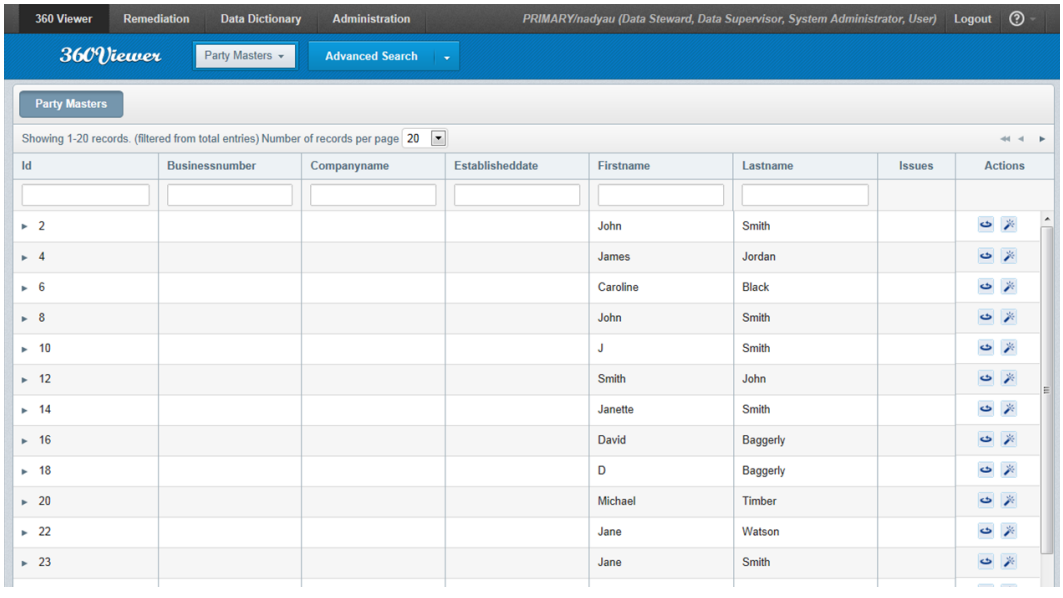
If the records are not displayed by default, then you can perform a search to generate a table, which displays relevant information that satisfy search criteria, as shown in the following image.



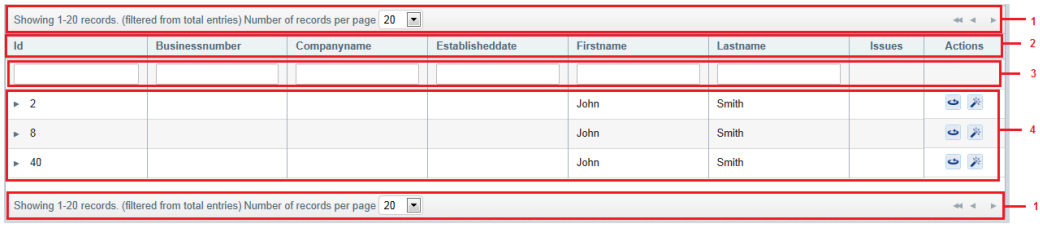
Note: When records are not displayed by default, the state of the page after a search has been performed is saved when navigating anywhere in the application.

The second default state of the Home page is to display a list of the records for a selected Domain in the system. The list of Domains and default current Domain are metadata driven and can be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133.

Currently, OGC provides only one Domain called Party. The first 20 records are retrieved from the database and displayed. You can choose a number of records to be displayed per page and navigate to the next pages to view other records. For more information, see *Using the Administration Console* on page 133.



There are several types of tables in the 360 Viewer. All tables have a similar user interface, as shown in the following image.



In general, tables consist of:

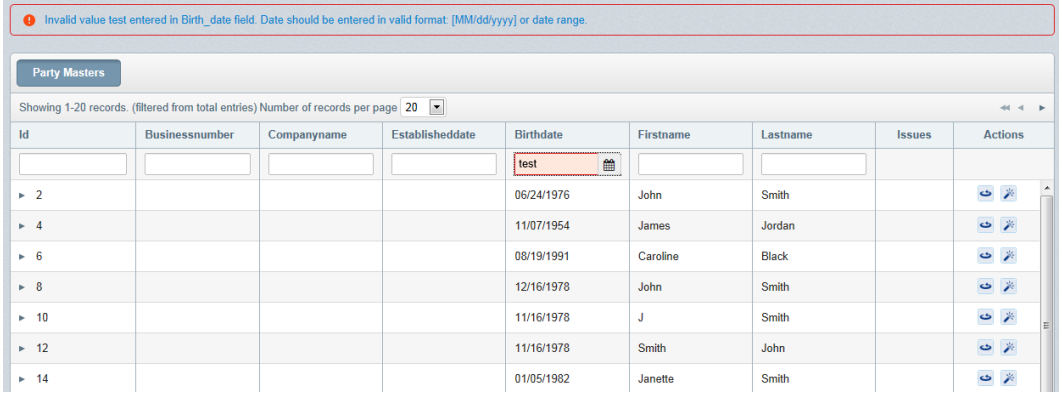
1. Page navigation
2. Column headers
3. Inputs for filtering
4. List of records

Page navigation provides functionality to move to the next, previous, and first page (because the count of all records in the grid is unknown). The number of records per page selection specifies how many records can be shown on one page (available options 10, 15, 20 (default), 25, or 30).

You can also filter the results utilizing dynamic filters below the table column headers. The results are updated dynamically to show only relevant records while you specify the value (with some delay). Filtering can be applied to several columns at a time.

Note: Only filtering by exact values is supported. Wildcard search is currently not supported.

Data entered in filtration fields is validated before filtering starts. Validation is performed dynamically while you specify the value. When invalid data is entered, a validation message is displayed and the corresponding field is highlighted in red, as shown in the following image.



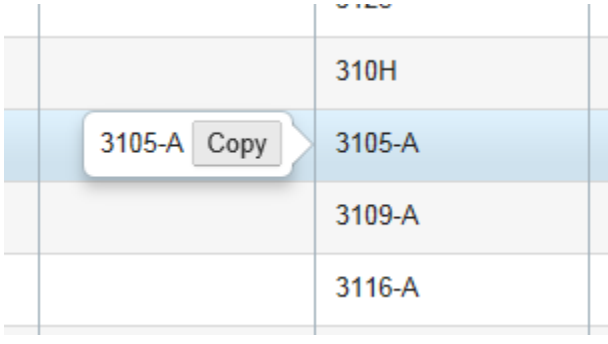
Validation is performed for numeric fields and fields with date format.

Note: Valid filtering criteria is saved for the table when you navigate anywhere in the application.

You can select the width, alignment of columns, what columns can be sorted and filtered. This can be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133.

For convenience, hints with the Copy button were implemented in all tables throughout the application. Hints appear when hovering the pointer over any value. When the Copy button is clicked, the value is copied and can be pasted in any input field, such as search or filtering fields.

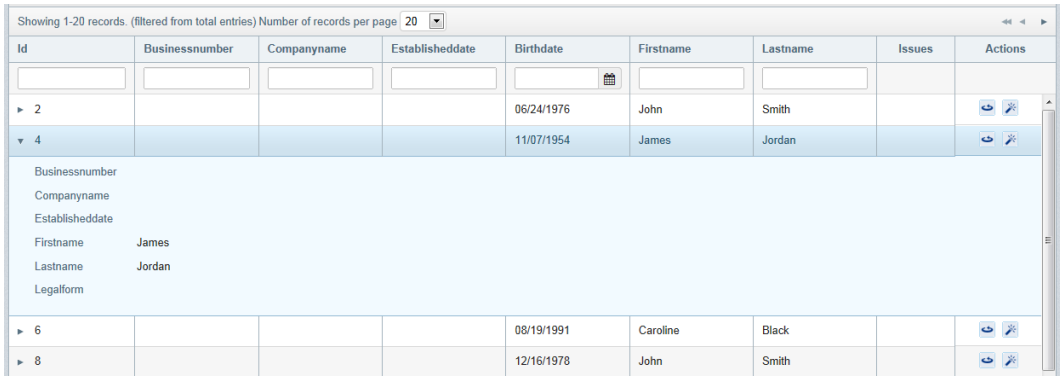
Note: By default, hints with the Copy button are not available.



In the event that hints with a Copy button are not required, you can change these to ordinary browser hints using the Administration Console. For more information, see *Using the Administration Console* on page 133.

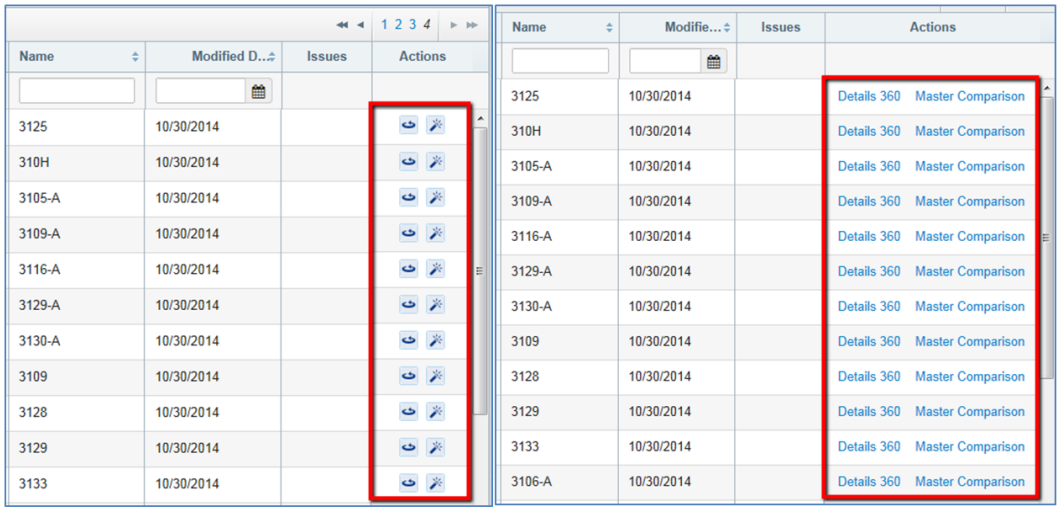
You can obtain a preview of a record. Note that the columns which are displayed are configurable by a system administrator. For more information, see *Using the Administration Console* on page 133.

The Preview Panel is displayed when you click anywhere on the record row. The row is highlighted upon hovering to indicate that the particular row can be selected. The Preview Panel is closed when you clicks the same record a second time or when another row is clicked on. However, only one preview panel may be opened at a time.



You can navigate to the Record 360 View by clicking Details 360 or view detailed Comparison View by clicking Master Comparison to see Golden Records and supporting Instance Records.

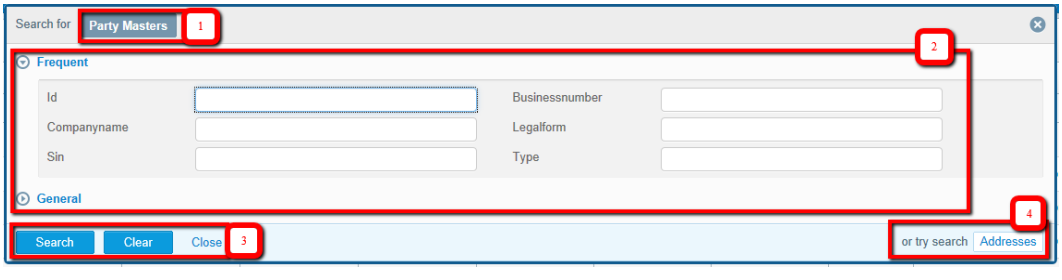
There are two possible ways of displaying Master Comparison and Details 360 links in the table:



The appearance of the Master Comparison and Details 360 links can be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133.

Advanced Search Dialog (for Golden Records)

Your may need to enter more parameters to find the records. You can use the Advanced Search feature for this purpose. The Advanced Search is accessible by clicking the Advanced search button.



The Advanced search dialog consists of:

1. **Domain tabs.** Allows you to change the domain for searching.
2. **Grouped attribute sections.** Used for entering search parameters.
3. Search, Clear, and Close buttons

Subdomain links allows you to search by subdomain record parameters. The list of displayed subdomains can be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133.

Note: Currently, search by sub-domains is not supported.

The attributes in the Advanced Search dialog are grouped into sections to make it easier for you to find a required attribute. This can be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133. Only one section can be expanded at a time: when another section header is clicked, the new section is opened and the previous opened one is closed.

Note: Filtering by exact values only is supported. Wildcard search is not supported.

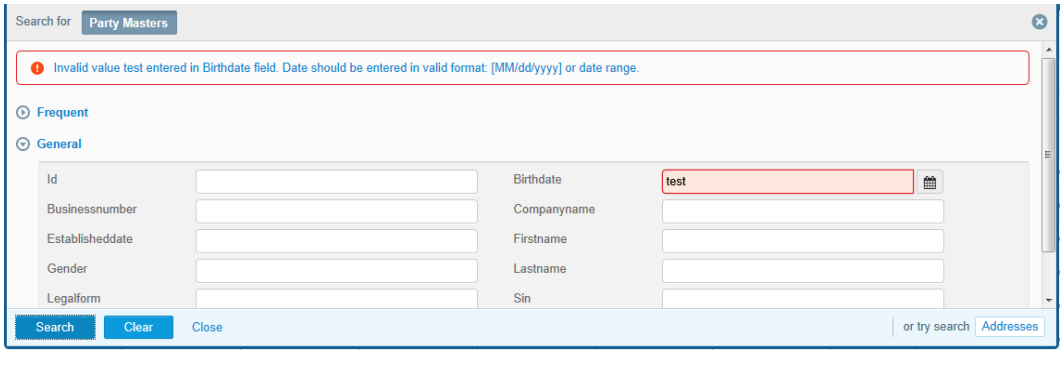
Clicking Search launches the search and allows you to find certain attributes you wish.

Clicking Clear deletes all entered criteria.

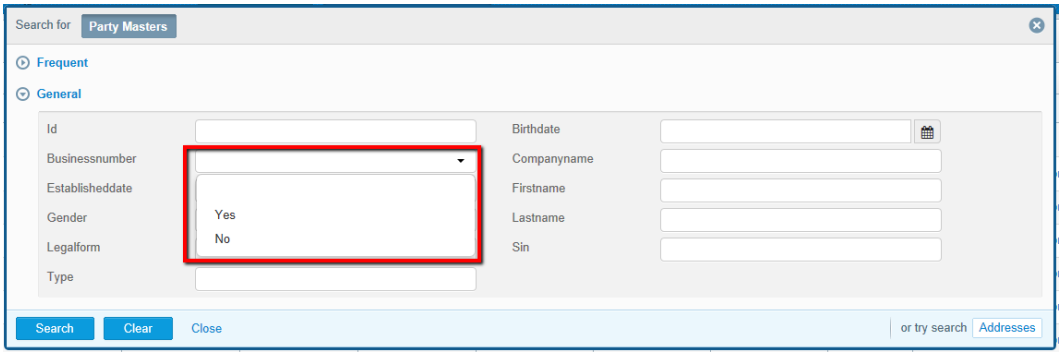
Clicking Close hides the search overlay without launching the search or updating search results. The parameters you entered are cleared to the state they were on during the last performed Advanced Search.

If you have already received Advanced Search results and returned back to the search overlay to edit your search criteria, the values you entered in your previous query are preserved.

The validation mechanism for numeric fields and fields with date formats also work for domain and subdomain pages. When clicking Search after invalid data is entered, the appropriate validation message appears and the corresponding field is highlighted in red, as shown in the following image.



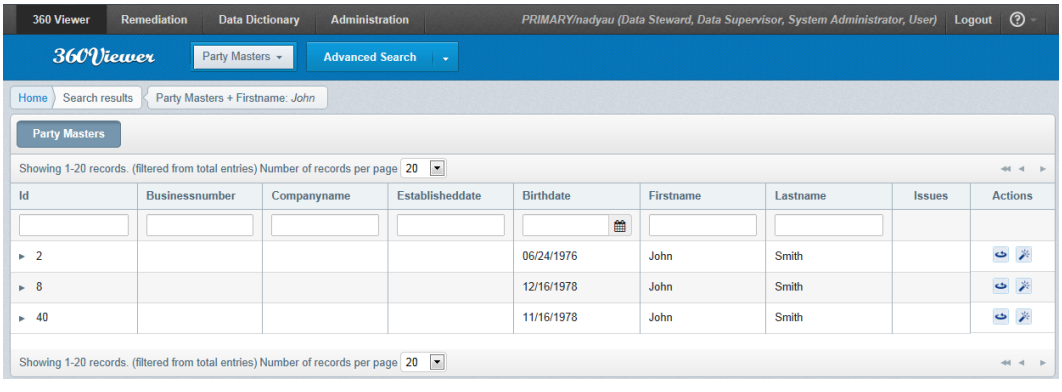
Some fields contain drop-down lists. In 360 Viewer, drop-down lists (data type Boolean) are supported only in the Advanced search dialog.



When clicking on a drop-down list, a list of possible values appear (for fields with Boolean type, there are two possible values Yes and No) and you can select the necessary option you wish.

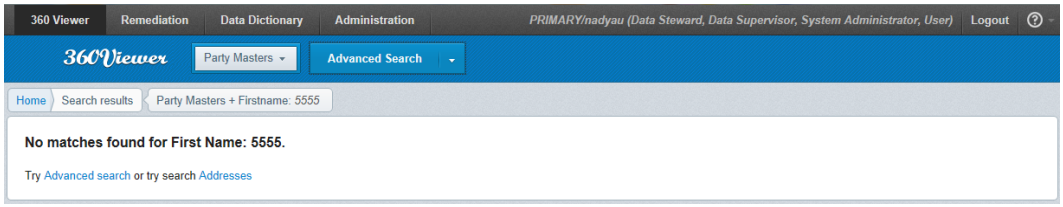
Search Results Page

After performing a search on existing criteria, the resulting number of rows is displayed in the results table and search criteria.



You can navigate to the Record 360 View from the search results page by clicking Details 360 or view detailed Comparison View by clicking Master Comparison to see the Golden Records and supporting Instance Records.

When performing a search by non-existing criteria, the appropriate message is displayed on the Search results page, as shown in the following image.



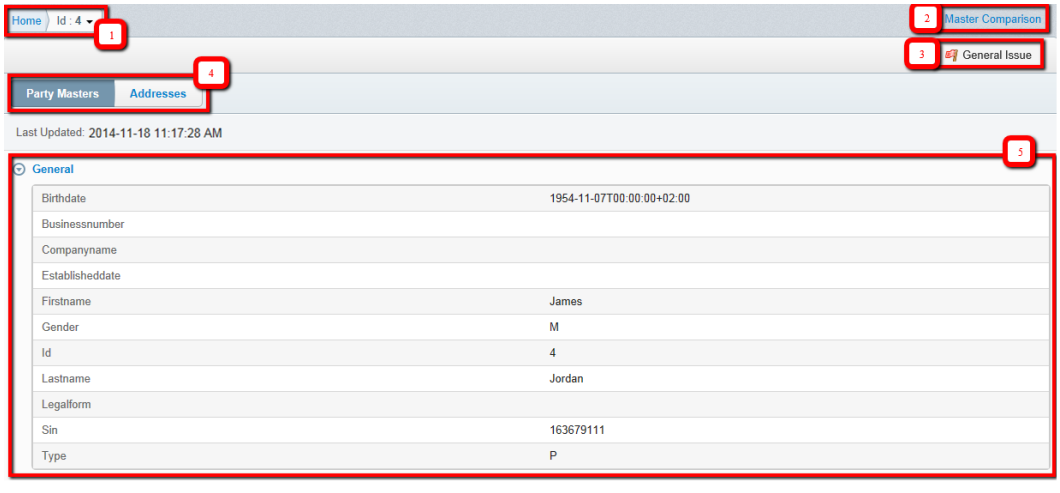
You can use links for quick access to the Advanced Search domain and the sub-domain dialog to issue a search using different criteria.

Details 360 Page

This section describes the Details 360 page.

Viewing Domains

To view detailed information about records, also called Golden records, click *Details 360*. The Details 360 link is also available on the Home and Search results pages.



The following list corresponds to the numbered sections in the Details 360 structure above.

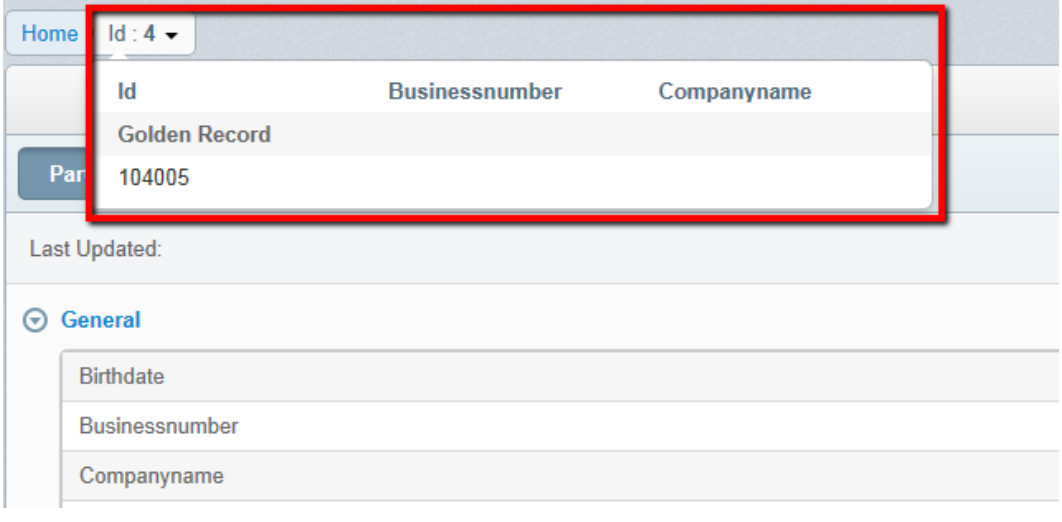
1. Breadcrumbs trail for navigating to the previously visited pages of the application.
2. Master Comparison link for navigating to the Master Comparison page of the record.
3. General issue button for creating a general issue case (if Remediation functionality is enabled).

4. Tabs which represent domain and sub-domains.
5. Detailed information of the domain record.

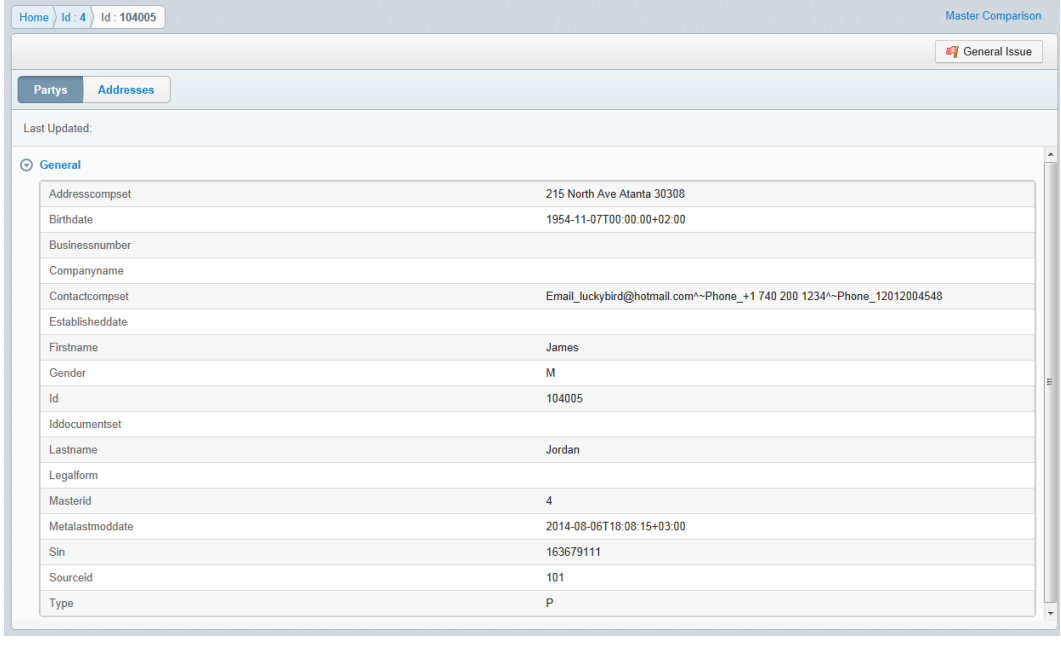
The data on the Details 360 page is represented by data from the domain record (Party Masters Record tab) and collections of surrounding data (for example, Addresses). You can switch between these categories by using the tabs located on the top of the window. They can be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133.

Data from the domain record is also divided into several sections (for example, General) which are collapsible and expandable. By default, all sections are expanded. To collapse or expand sections, click the section name. Sections and their properties can be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133.

If you wish to view detailed information for an Instance record related to a selected Golden record, then you must click the drop-down list in the breadcrumbs section and select the required record, as shown in the following image.



Once the record is selected, a detailed view of the instance record is displayed and is similar to the Golden record.

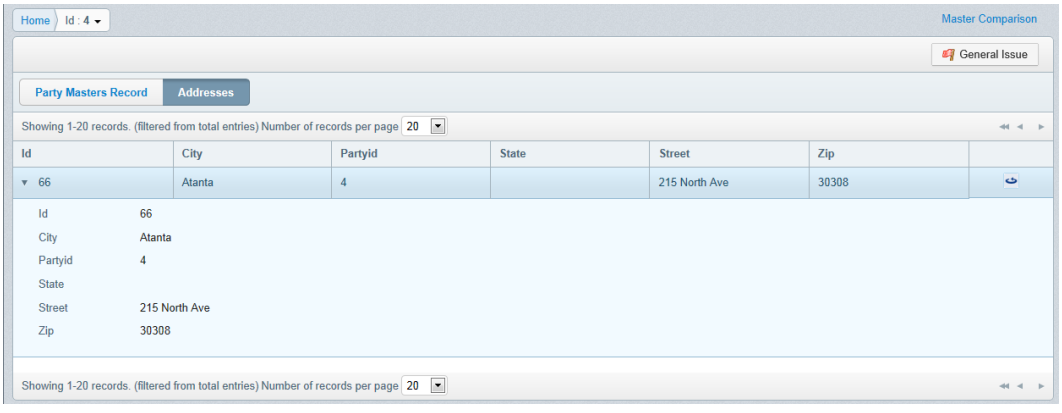


You can return to the Details 360 page of a Golden record by clicking on the appropriate breadcrumb item.

Viewing Sub-domains

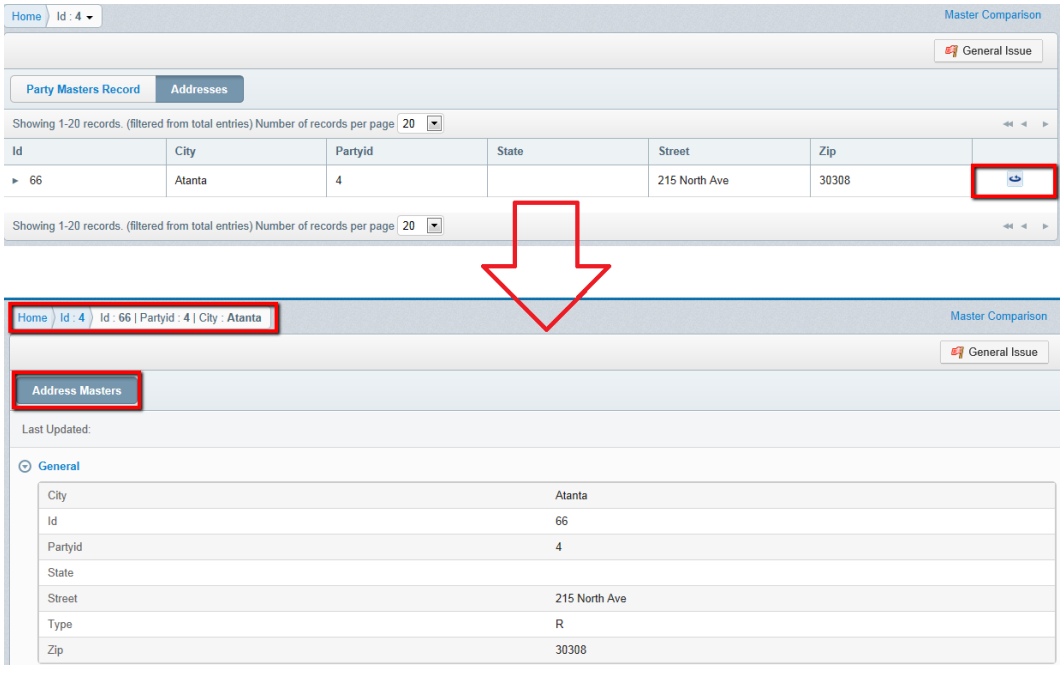
To view detailed information about **sub-domains**, click the appropriate tab header. For example, the sub-domain Addresses tab displays all addresses the record contains in the system. The same mechanism is used for other sub-domains.

When a table row is selected, the Preview Panel appears, showing more detailed information associated with the record. Viewing the Preview Panel can be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133.



You can configure the width, alignment of columns, and what columns can be sorted. For more information, see *Using the Administration Console* on page 133.

If you wish to view the Details 360 information about specific sub-domain records, click the Details 360 link or icon corresponding to that record.



Note: Viewing sub-domains of instance records are used the same way as described above.

Master Comparison Page

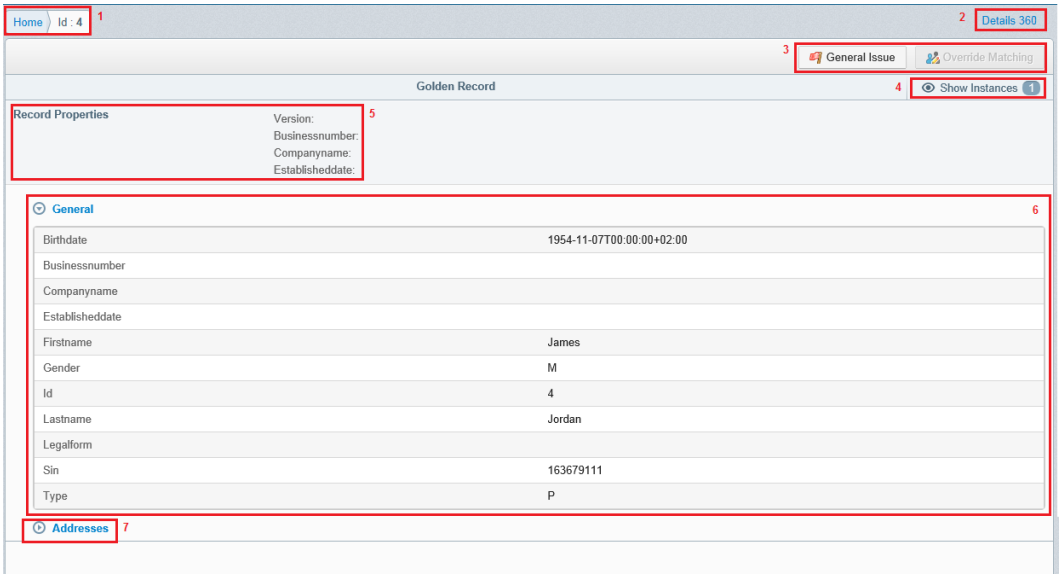
You can compare Instance records with other Instance records and Golden records.

To view the Master Comparison page of the Golden record, click the Master Comparison link of the specific record on the Home page or Search Results page.

The following list shows the sections of a Master Comparison page corresponding to the image below.

1. Breadcrumbs trail for navigating to previously visited pages.
2. Details 360 link for navigating to the Details 360 page of the record.
3. General Issue and Override matching buttons for creating general issues or overriding matching cases (if the Remediation functionality is enabled).
4. Show Instances link for expanding the Instance records section.
5. Record Properties section which displays general information about the record.

6. Grouped attribute section(s).
7. Sub-domain(s) section(s).



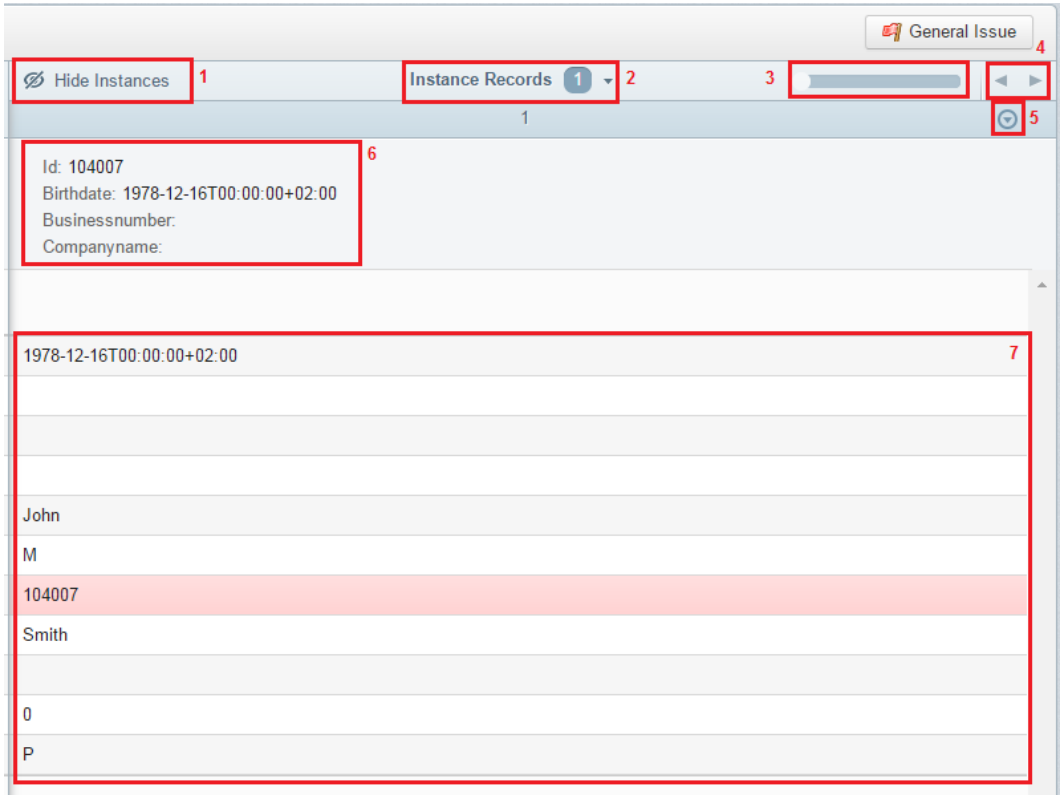
The Record Properties are displayed on the top of the page and can be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133.

By default only data from Golden records are displayed on the Master Comparison page.

The data is organized into sections that can be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133.

The items of collections which represent sub-domain data are displayed hierarchically in expandable sections (collapsed by default) and can also be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133.

Click the Show Instances link to view all Instance records corresponding to the current Golden record. This link displays the number of Instance records for the Golden record. The candidate section is expanded to the right of the Golden record.



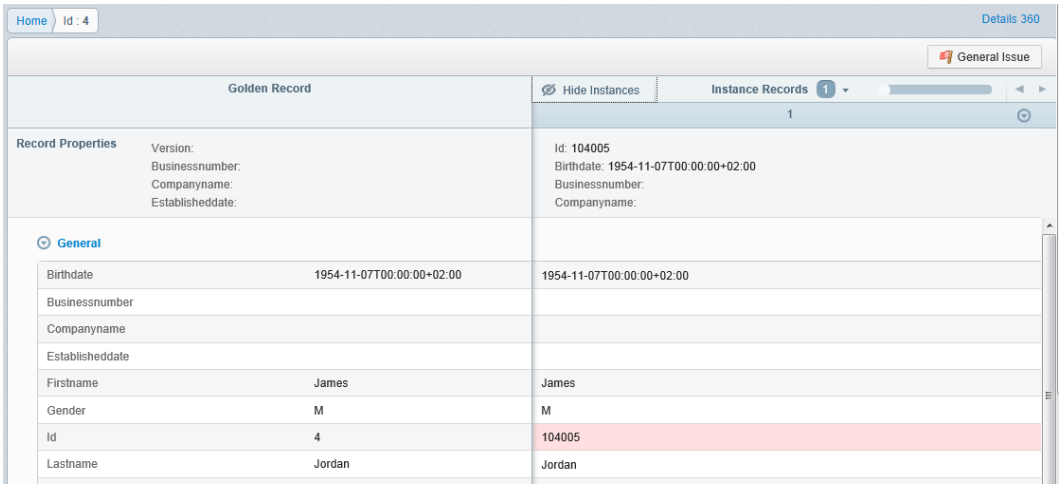
The following list describes the structure of Instance records, corresponding to the image above:

1. Hide Instances link, used for collapsing the whole section.
2. Instance records label, used for opening the list of Instance records.
3. Slider, used for changing the number of Instance records displayed on the page at once (it is disabled when there is only one Instance record).
4. Navigation arrows, used for navigating between Instance records that are not displayed on the page (they are disabled when there is only one Instance record)
5. Drop down menu for each Instance record

The Record properties section displays general information about each Instance record. Viewing this section can be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133.

1. Grid with values of each Instance record.

The Instance record's information is displayed next to the Golden record so that it may be compared easily. Values of attributes in each Instance record that are different from the attribute value in the Golden record itself are highlighted with a *pink* color. The values that were standardized are highlighted with a *yellow* color.



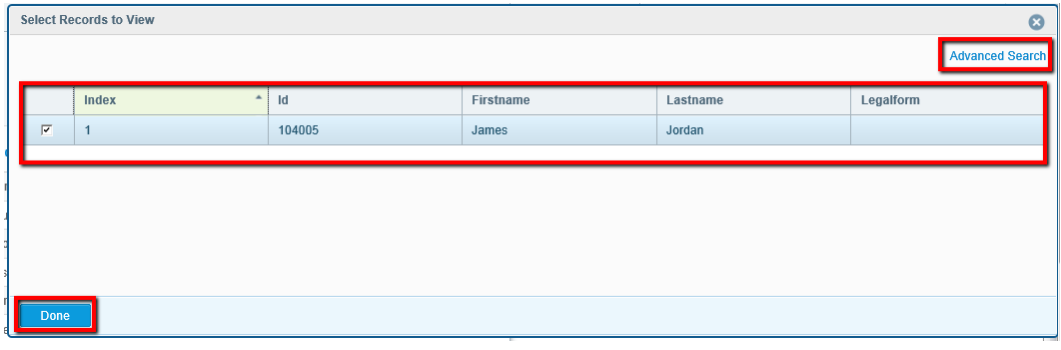
Note: The size of the Golden record and Instance record sections can be changed by moving the divider between those sections.

Subdomains are essential attributes of the Golden record that are not uniquely identified in the record. Subdomains are almost always a many-to-one relationship with the base record. These subdomains can be names, addresses, and contact information (for example, emails and phone numbers). However, one Instance record can have two names in a collection, and another Instance may have three. The resulting Golden record may be a UNION of values across Instances.

Instance records can have a different number of items in the collections and not all items are used to compose the Golden record. The items that are used in Golden records are highlighted in green borders. Values of attributes in each Instance record, that are different from the attribute value in the Golden record itself, are highlighted in pink. The values that were standardized are highlighted in yellow. Sub-domains that fully coincide with appropriate Instance records have green borders.

Instance Records Overlay Window

If you wish to see the list of all Instance records that correspond to the selected Golden record, you can open the Instance records overlay window by clicking the Instance records label.



The Instance records overlay window consist of:

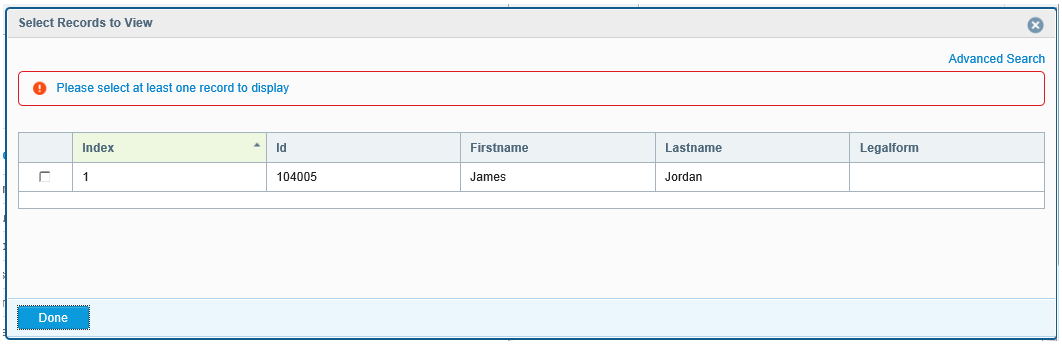
- The Advanced Search link that opens the Advanced search panel.
- The list of Instance records showing all Instances or Search results.
- The Done button that closes the dialog and displays the selected Instance records on the Master Comparison page.

If there are many Instance records corresponding to the current Golden record, you can open a full list of Instance records and select some records to be displayed in Comparison mode. You can also search for a desired Instance record by using the Advanced Search by any attributes available.

Clicking on the title of the Instance records section, provides a list of all Instance records corresponding to the current Golden record. All the records in the list are selected by default. If the list is long, the scrollbar inside the overlay window is displayed. For each Instance record, fields can be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133.

Currently displayed records are selected and highlighted. To select or deselect records, select or clear the appropriate check boxes. When you are finished with your selection(s), click *Done* to close the overlay and refresh the Comparison view to show selected Instance records.

At least one record must be selected before clicking Done. If no records are selected, a validation message appears, as shown in the following image.



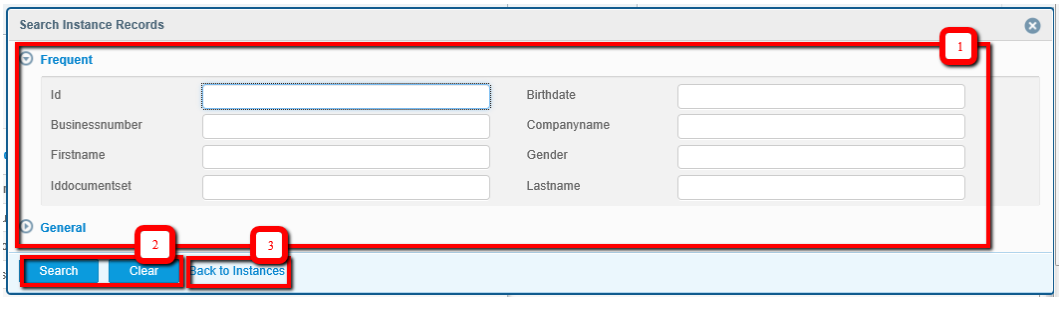
Advanced Search (for Instance Records)

To search by different parameters (for example, find all Instance records that have a particular Date Of Birth, the same as in a Golden record), you can use the Advanced Search link. When you click Advanced Search, the overlay window is enlarged. You can then enter any number of criteria and click the Search button.

Note: Only strict searches are supported. Wildcard searches and searches using the OR operator (or comma) are not supported.

The Advanced Search dialog consists of the following sections, corresponding to the image below.

1. Grouped attribute sections for setting search parameters.
2. Search and Clear buttons.
3. Back to Instances link.



Note: For now, searching by sub-domain attributes is not supported.

The attributes in the Advanced Search dialog are grouped into sections to make it easier for you to find the required attribute. This can be configured using the Administration Console. For more information, see *Using the Administration Console* on page 133. Only one section can be expanded at a time. For example, when another section header is clicked, the new section is opened and the previously opened one is closed.

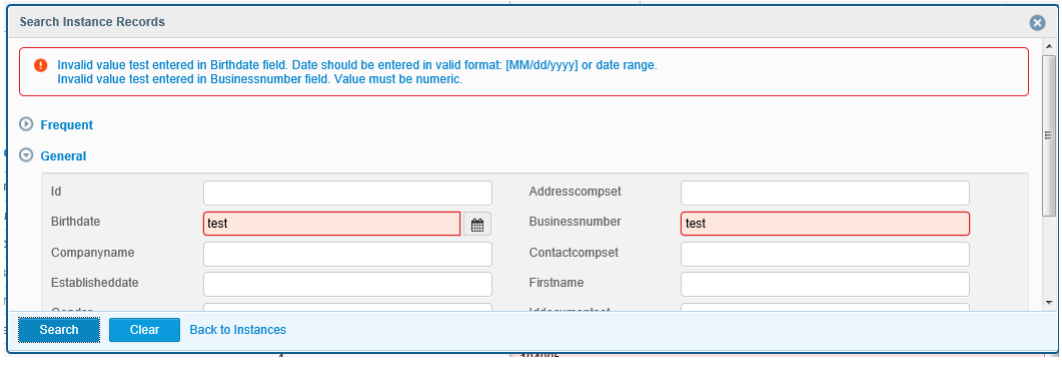
Clicking the Search button allows you to see a list of search results which consists of matching Instance records corresponding to the current Golden record.

The Clear button deletes all entered criteria.

Clicking Back to Instances closes the Advanced Search dialog, and causes the Instance records overlay to appear.

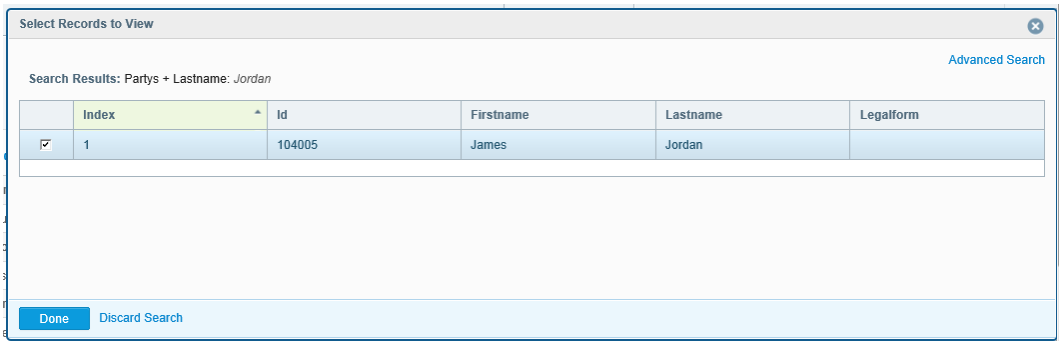
If you already have Advanced Search results and you return to the search overlay to edit search criteria, the previous values you entered in the query are preserved.

There is also a validation mechanism for numeric fields and fields with a date format. After invalid data is entered and you click Search, the appropriate validation message appears and the corresponding field is highlighted in red, as shown in the following image.

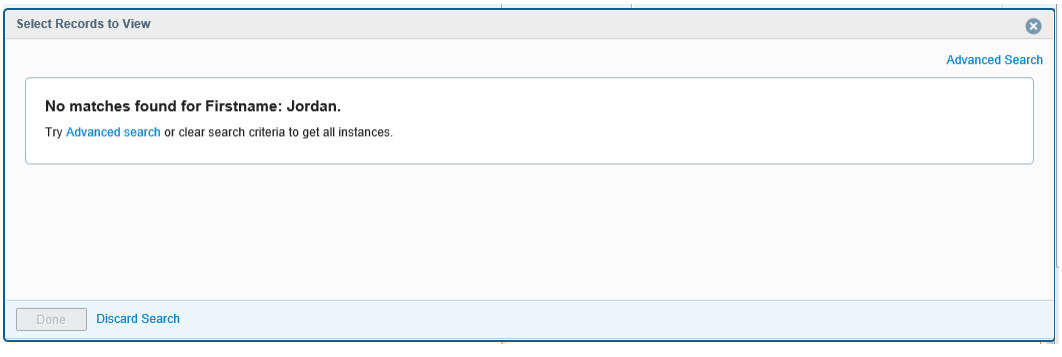


Search Results Page (for Instance records)

After Search is performed by existing criteria, the resulting number of rows is displayed. All records are selected by default. The search query parameters are summarized above the search results, and the Discard Search link appears for discarding search and displaying the list of Instance records.



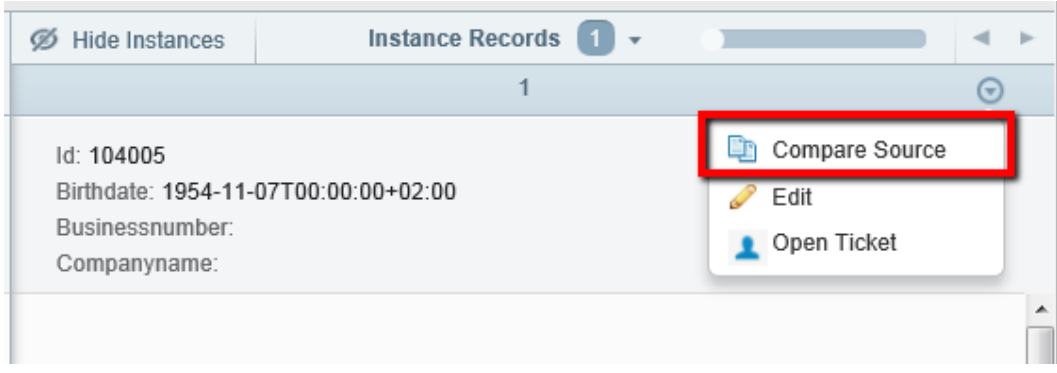
When you perform a search by non-existing criteria, the appropriate message is displayed on the Search results page and the Done button is disabled, as shown in the following image.



You can navigate to the Advanced Search dialog by clicking the Advanced Search link or return to the full list of Instances if you click the Discard Search link.

Compare Source Page

For each instance record, you can compare all of its values with values from the Source system. To do this, open the Instance record context menu by clicking on the icon next to the Instance record title, and select the *Compare Source* option, as shown in the following image.



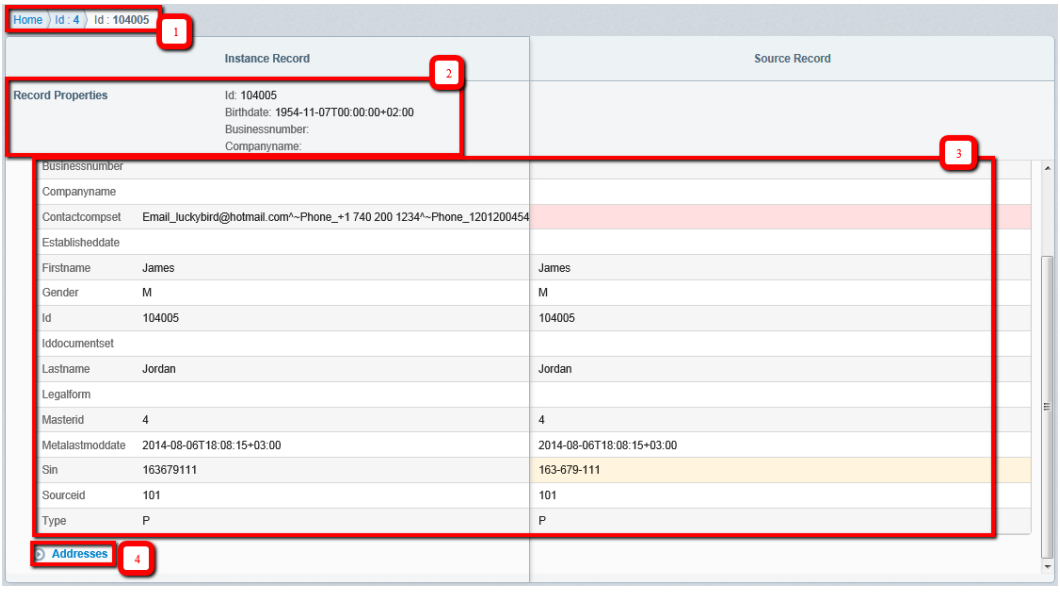
On the Source Comparison View, the details of the Instance record are displayed on the left and the corresponding Source record details are displayed in the right side of the page.

The format the Instance record is presented in is similar to the format of the Golden record on the Master Comparison page.

The Compare Source page consists of the following sections, corresponding to the numbered areas in the image below.

1. Breadcrumb trail.
2. Record properties section displaying general information about the Instance record.
3. Grouped attribute sections (expanded by default).

4. Subdomain section(s) (collapsed by default).



Grouped attribute sections and Subdomain section(s) are configured through the Administration Console for the corresponding Instance table. You can also configure the Record Properties section in the Administration Console. For more information, see *Using the Administration Console* on page 133.

Values of attributes in the Source record that are different from the attribute values in the Instance record itself are highlighted in pink, while the values that were standardized are highlighted in yellow (similar to a subdomain record value). For subdomains, there is another option of highlighting. If the value of an Instance record fully coincides with values of a Source record, then the whole section has a green border.

Chapter 3

Available Pages in the Remediation Portal

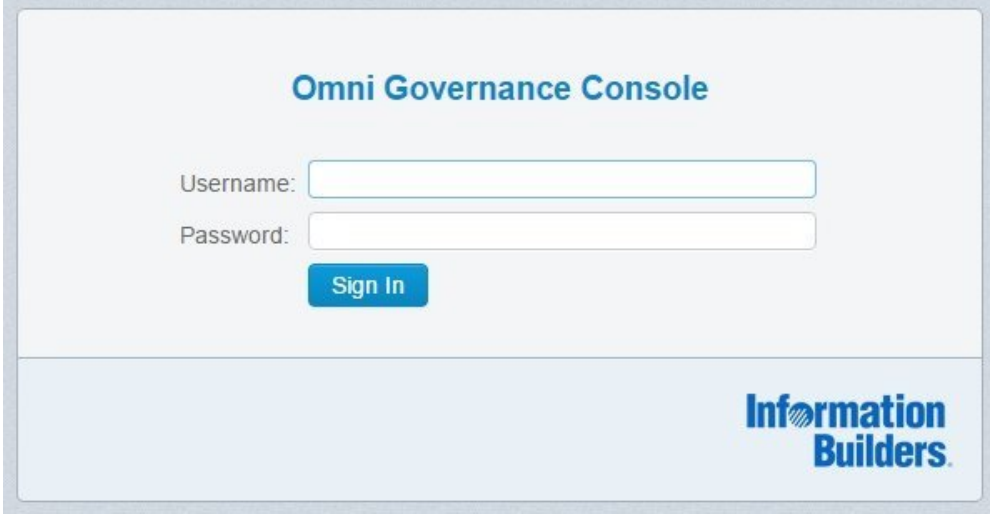
This chapter describes how to use the available pages in the Omni Governance Console (OGC) Remediation Portal.

In this chapter:

Sign In Page

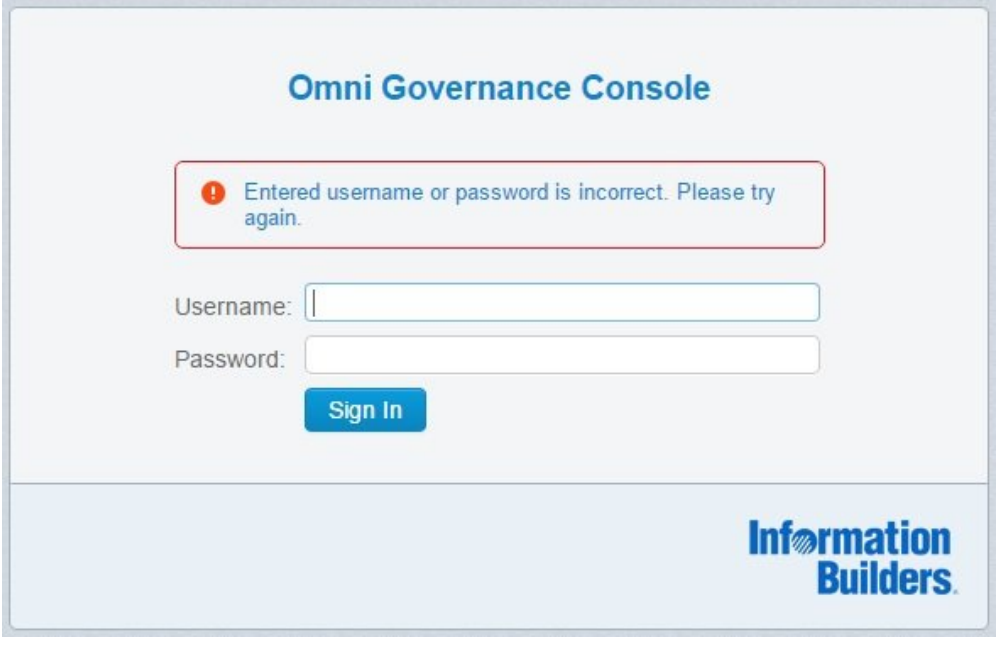
All users of the Omni Governance Console (OGC) Remediation Portal are required to log on using a valid user name and password to configure and use the application.

The following image shows the Sign In page of Omni Governance Console that is displayed.



If a valid username and password is provided during the logon attempt, you are automatically redirected to the Home page.

If an invalid username or password is provided during the logon attempt, a message appears, indicating that invalid credentials were entered, as shown in the following image.



Omni Governance Console (OGC) Menu

The Omni Governance Console (OGC) menu has different components for unauthenticated users (guests) and authenticated users.

The OGC menu for unauthenticated users contains:

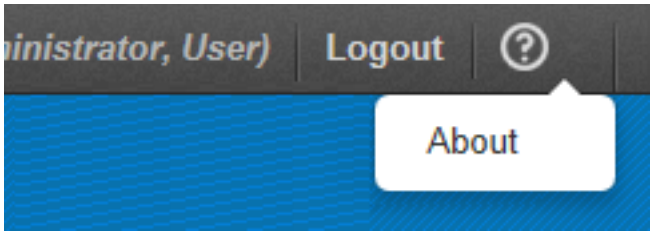
- Login button
- *About* drop-down menu

The OGC menu for authenticated users contains:

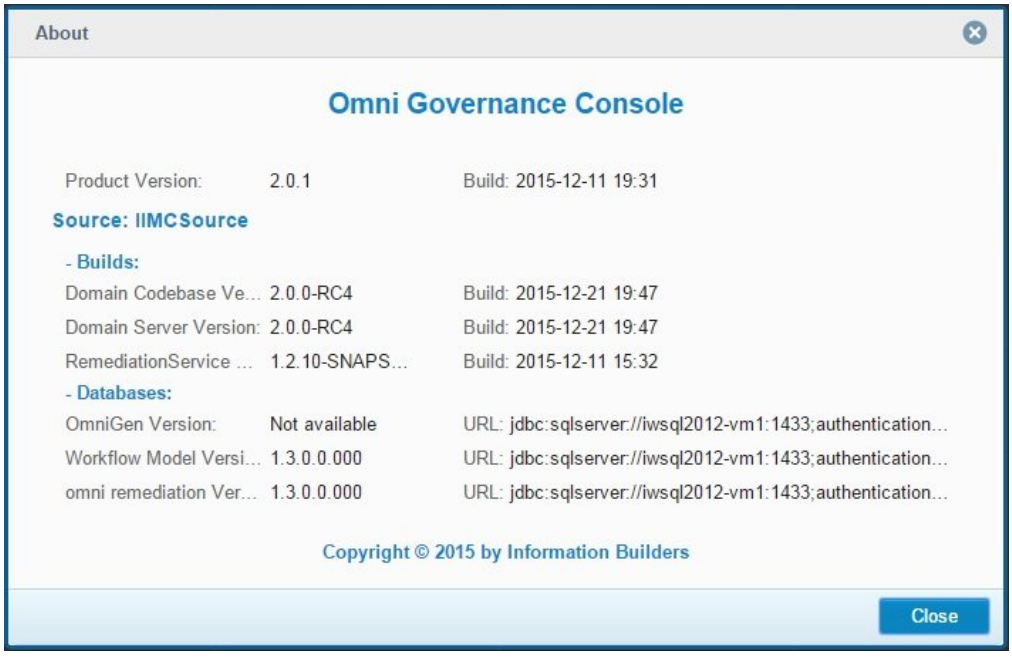
- The OGC component buttons.
- Current user details (username and role in the brackets)

- *Logout* button
- *About* drop-down menu

The *About* drop-down menu contains the *About* item which opens the *About* dialog.



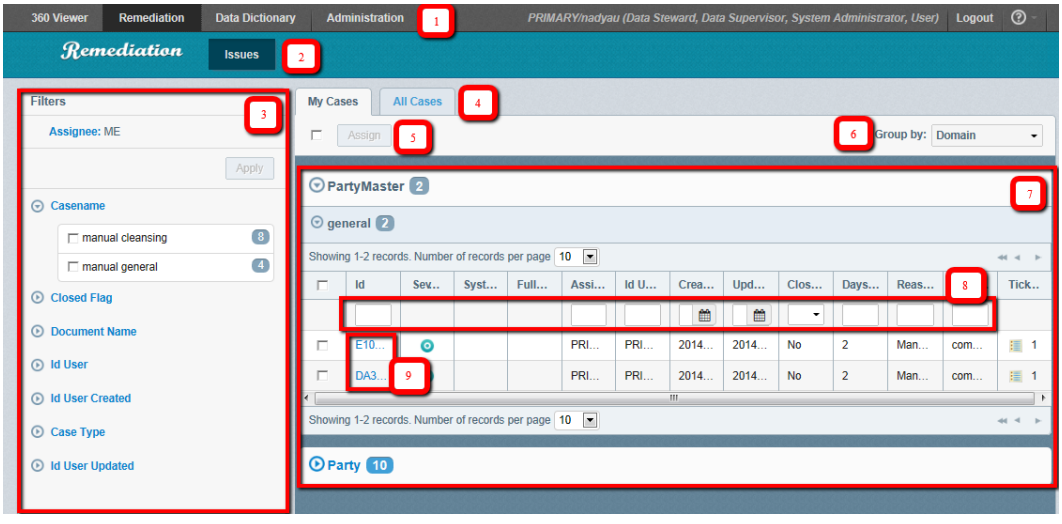
The *About* dialog box contains information about source, builds, and databases versions.



Once you have logged on, you can log off when access is no longer needed. To perform this step, you can click the *Logout* button that is represented in the top-right corner of every page for authenticated users. You will then be redirected back to the Sign In page.

Issues Page

When you select the Remediation menu item from the application navigation menu, you are navigated to the Issues Page.



The structure of the page is the following:

1. The application navigation menu
2. Remediation logotype and menu items
3. Filtering panel
4. My Cases/All Cases tabs
5. Assign button
6. Group By drop-down list
7. Tables with the list of issues
8. Filtration pane
9. Links to View Issue pages

The Issues page is the main page Data Stewards and Data Supervisors work in. They can view issues existing in the system through links in the tables (9), switch quickly between pre-configured groups of issues (for example, view My Cases and All Cases) (4), assign (5), or filter issues to see falling within particular criteria (3 and 8). They can also group existing issues by Case Type, Domain, or Assignee (the last option is available in the All Cases tab (6)).

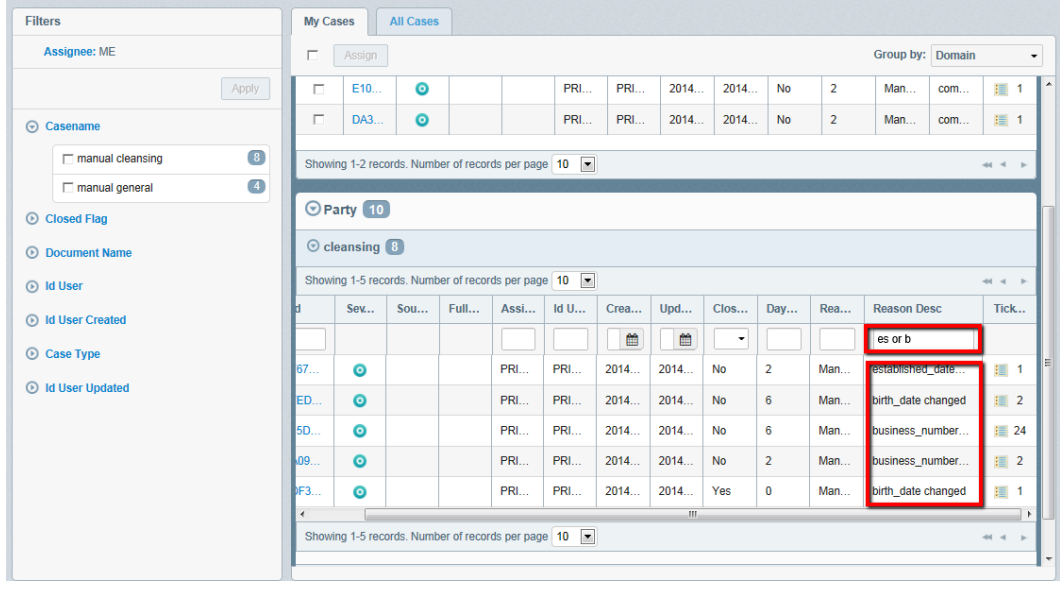
The Remediation logotype is a link that leads you to the Issues page from whatever Remediation page you are currently on.

The My Cases tab displays a list of Issues assigned to the current user. In order to see all issues that are in the system, you can select the All Cases tab.

A list of Issues is represented in expandable tables. By default, only the tables in the first domain are expanded. You can filter, sort issues by preferable column(s), and change the look of the table by resizing the width of the column or selecting different number of records to be shown per page. By default, up to 10 records are displayed per page, but you can select 15, 20, 25, or 30 records to be displayed per page. All tables are configured through the Administration portal.

For more information, see *Issues Page* on page 117.

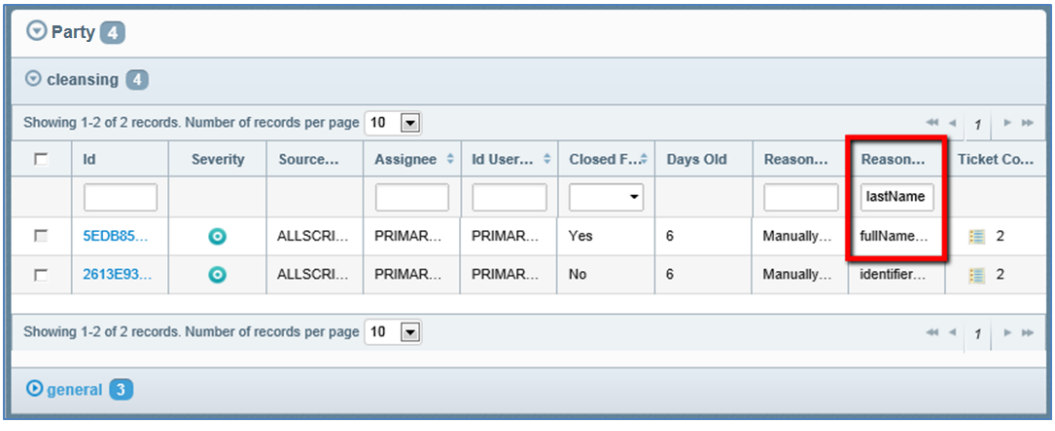
If you want to filter data in the table by more than one criteria for a specific column, then you can use the *OR* operator in any filtration field. Both full and partial entries are supported.



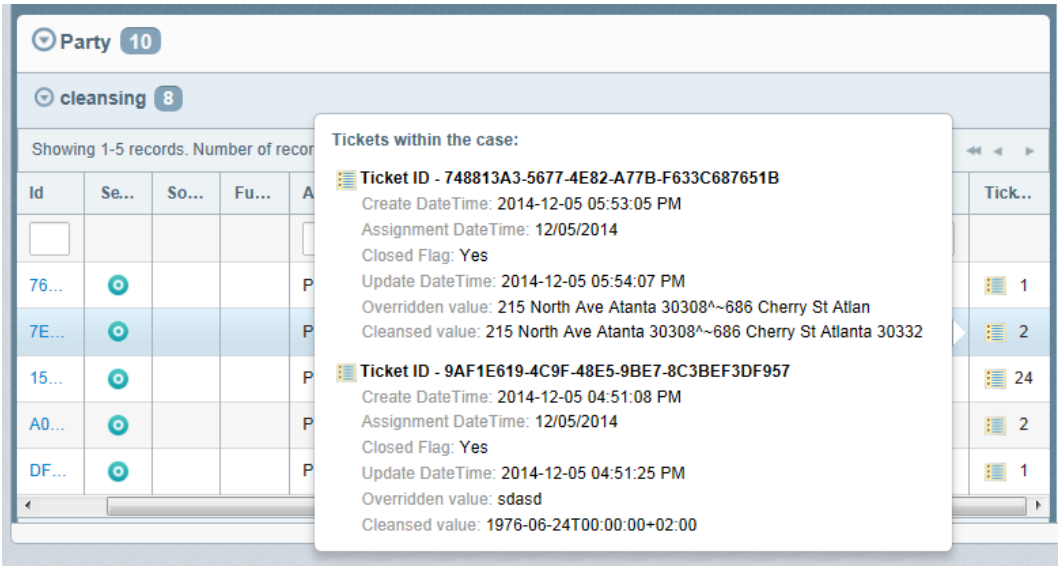
Note: The *OR* operator works only for fields with a string data type.

There are three unusual columns on the Issues page: Reason Code, Reason Description, and Ticket Count. They display information about tickets within the cases.

The value of the random ticket within the case is displayed in the table, but all ticket values are included in the filtering process. For example, you can override values of middleName and fullName fields for some record. That means that within one case, there are two tickets. One corresponds to the fullName change, and the other corresponds to the lastName change. The Reason Description column displays the *fullName changed* value, but if you filter data by *lastName changed*, the same case is displayed in the table.

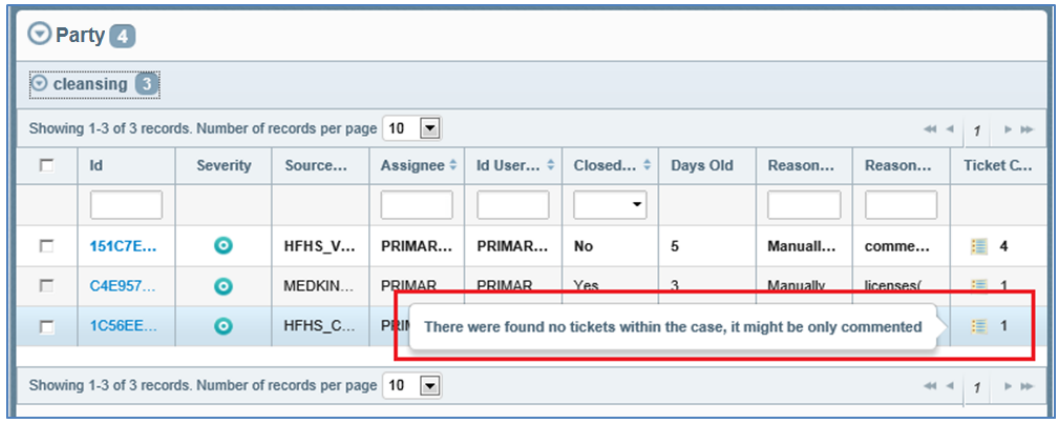


The Ticket Count column displays the number of tickets within the case. When you move the pointer over the icon, a pop-up window with the appropriate information appears.



Note: The Ticket Count column should be available only for Cleansing cases.

The cleansing case can also be created by adding a general comment. No ticket will be created, but an appropriate pop-up appears when the mouse arrow is hovering over the icon in the Ticket count column.

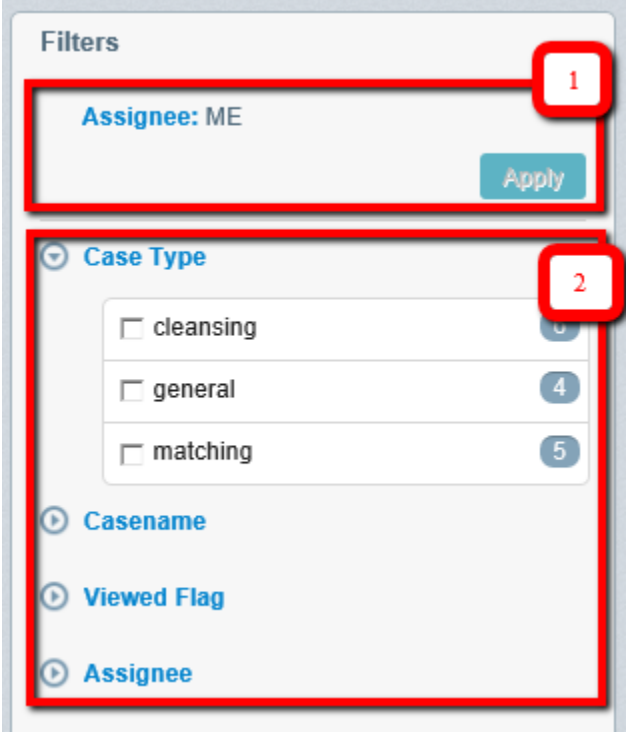


Fields displayed in the *Tickets within the case* pop-up window can be configured using the Administration console.

For more information, see *Ticket Within the Case Pop Up* on page 123.

You can filter data in all tables simultaneously by using the Filtering panel.

The filtering panel is located to the left of the table and is fully customizable. You can form the list of filtering criteria and select how many sections can be expanded by default, as shown in the following image.



For more information, see *Filtering Panel on My Cases Tab* on page 120.

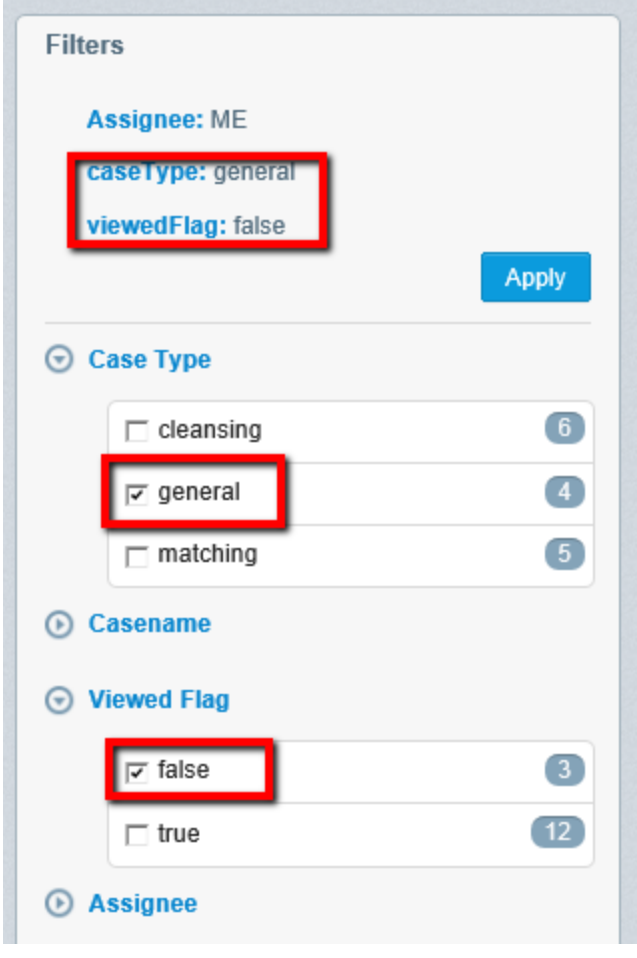
The Filtering panel consists of two main sections:

- The list of filters already applied or ready to be applied (1).
- The list of all available filtering criteria (2). The count of records that fall under specific criteria is displayed beside each criteria.

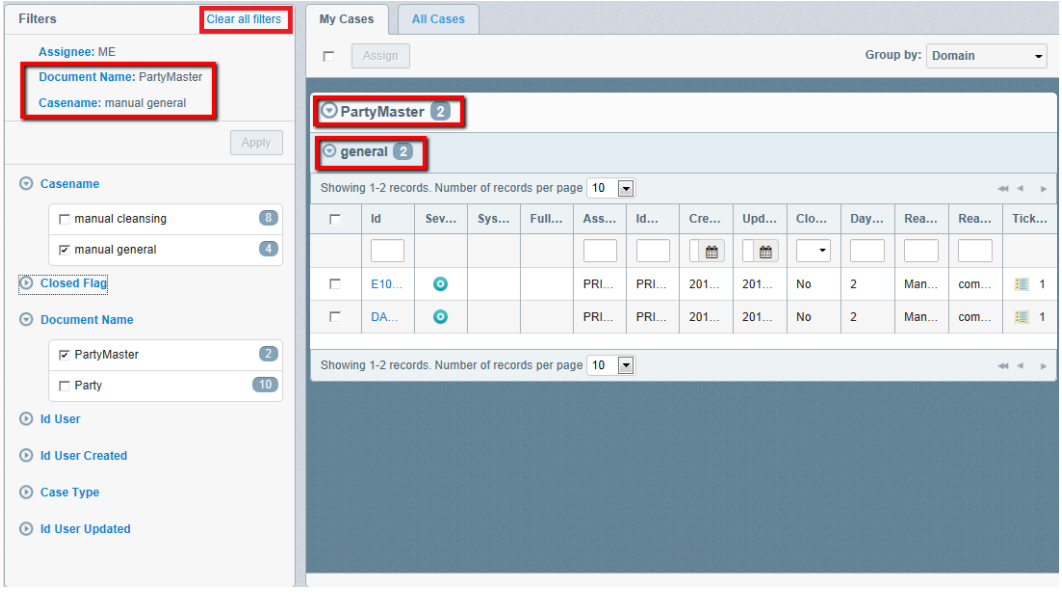
Note: On the My Cases tab, data is already filtered by Assignee, and cannot be discarded.

Filtering on the My Cases and the All Cases tabs are independent from each other.

In order to add some filtering criteria to the upper section, select the appropriate check box, as shown in the following image.

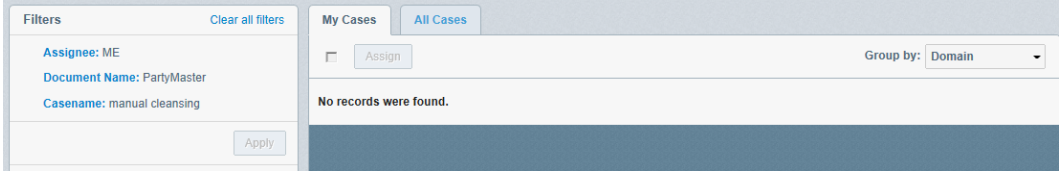


The *Apply* button becomes available when at least one filtering criteria is selected. When you click the *Apply* button, the table with records reloads in order to show only relevant data. The *Clear all filters* link appears, so that filtering could be discarded, if needed.



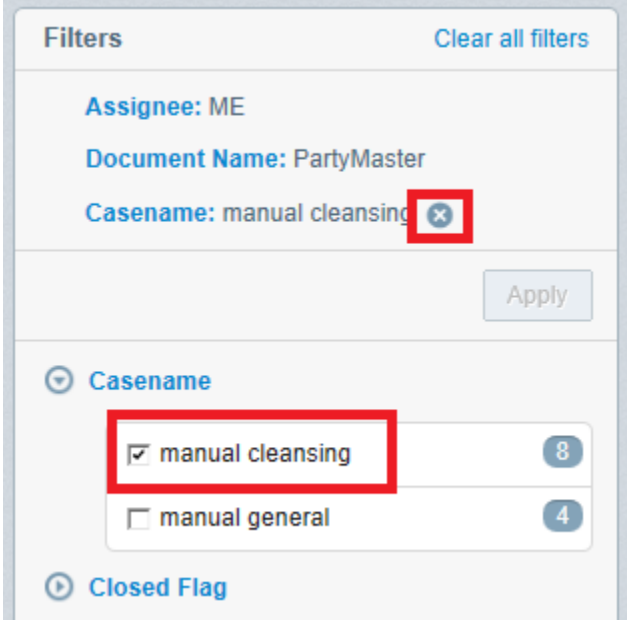
Note: Filtering data using the Filtering panel and Filtering panes inside of the tables can be easily combined to display only relevant information.

If the combination of filtering criteria gives no results, the appropriate message is displayed.



Note: Filtering by criteria within one section works similar to using the *OR* operator, and filtering by criteria from different sections is similar to using the *AND* operator (for example, filtering by manual cleansing, manual general case names, and document name Provider Master will find both Cleansing and General cases that belong to Provider Masters domain only).

When you want to delete some selected filtering criteria from the list, you can clear the appropriate check box in the bottom section of the Filtering panel or click the Delete (*X*) icon corresponding to the appropriate criteria in the upper section.



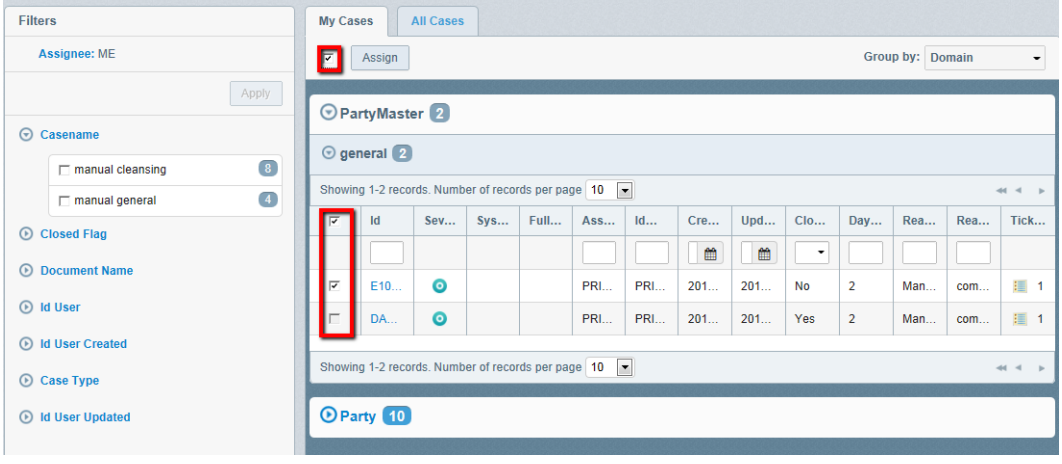
Note: An *X* icon appears when hovering over the appropriate criteria.

When you delete unnecessary criteria, click the *Apply* button again, so that filtering is applied.

After applying filters, the state of Issues page is preserved when navigating throughout the application. It is saved until you log out or the session has expired.

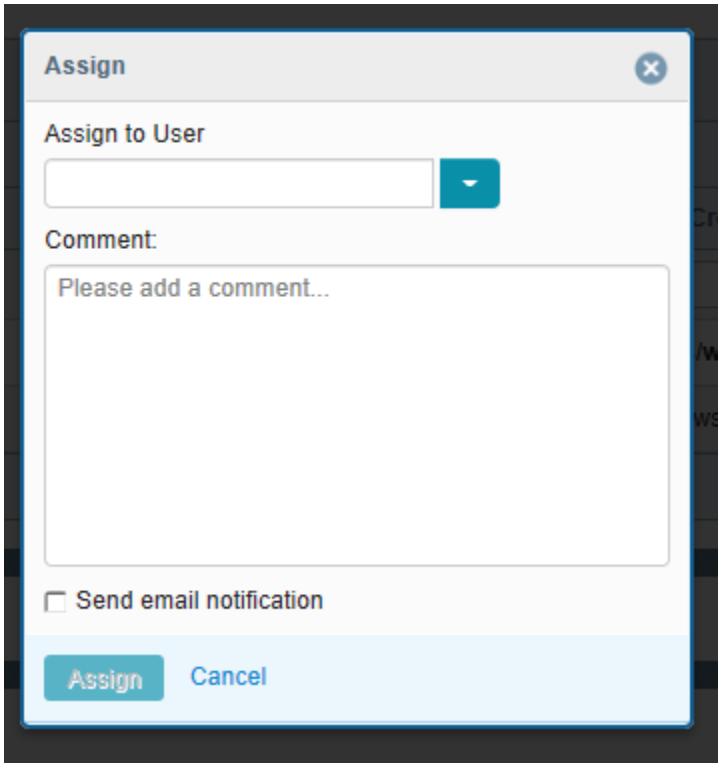
The Issues page allows you to bulk assign cases to different users. By default, the *Assign* button is disabled. To enable it, at least one issue needs to be selected by selecting the check box near the issue that needs to be reassigned. If all issues available on the page need to be reassigned, you can select the top check box that allows selecting all issues on the page, and then click the *Assign* button, as shown in the following image.

Note: Only cases of preloaded tables get selected due to the Lazy Loading logic that is implemented.

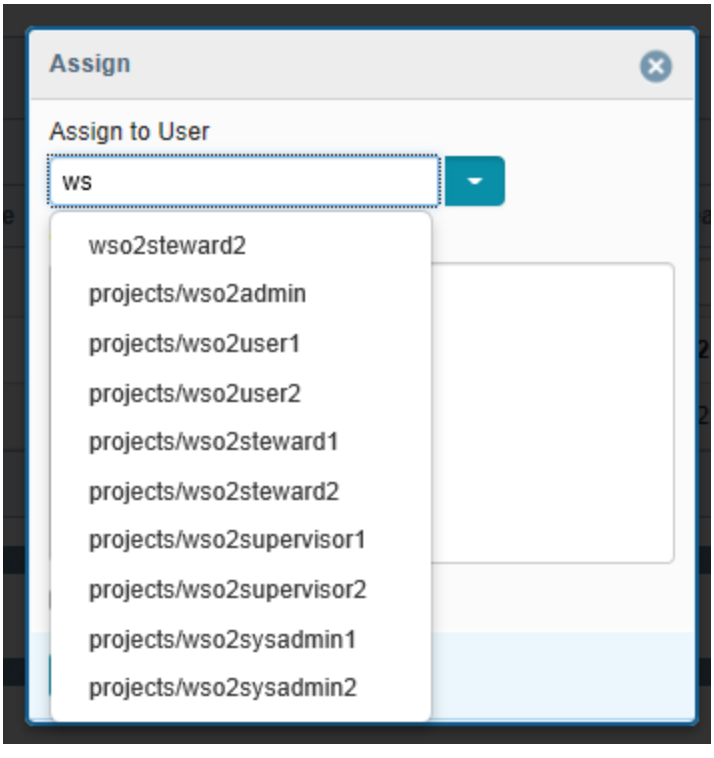


Note: When a case is closed, the check box for that record is disabled and cannot be reassigned.

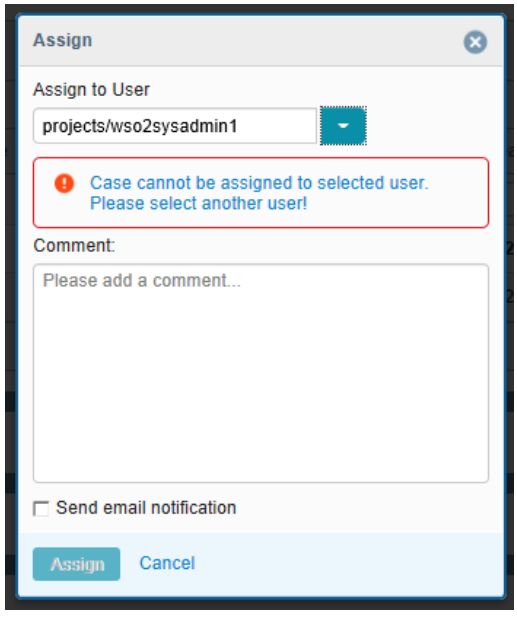
After the required cases are selected and you click *Assign*, the Assign dialog box appears, as shown in the following image.

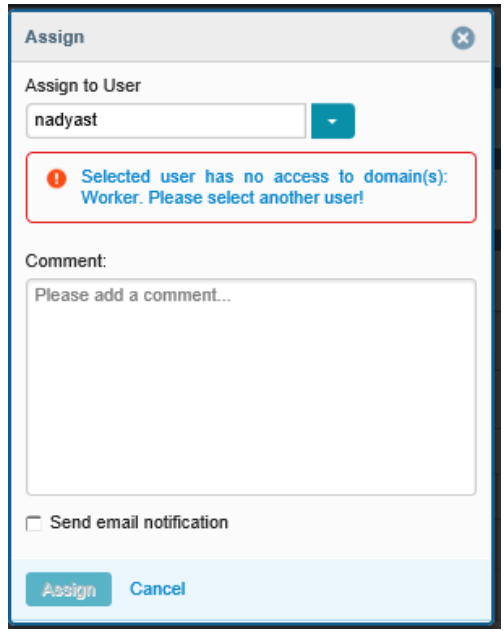


A list of users is available in the *Assign to User* drop-down list. When you start typing in the field, data is filtered dynamically to display only the relevant information.

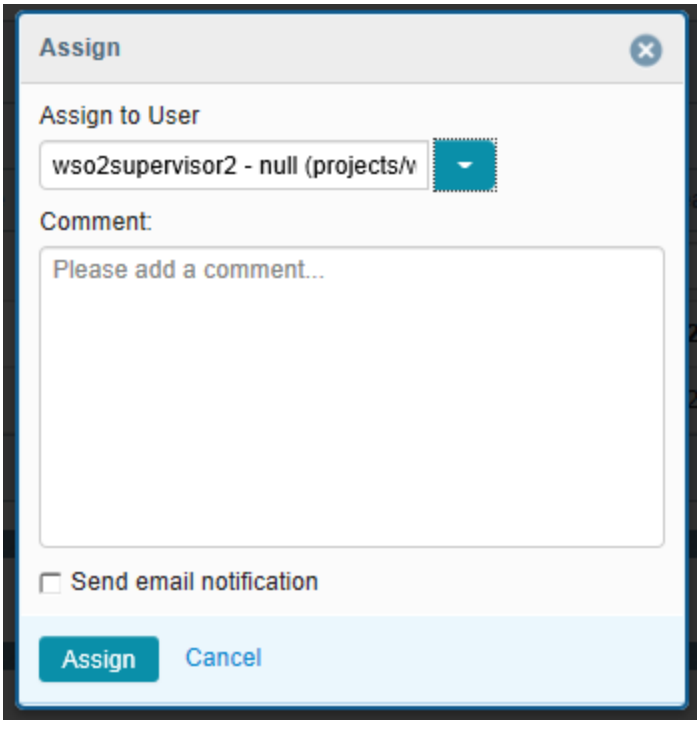


If the case cannot be assigned to the user selected from the list (for example, because the selected user has no permissions to resolve the issue, or has no permissions to work with the required domain and so on), or entered data finds no matches in the database, then the appropriate validation message is displayed, as shown in the following image.


Assign
Assign to User
projects/wso2sysadmin1
Case cannot be assigned to selected user.
Please select another user!
Comment:
Please add a comment...
Send email notification
Assign
Cancel

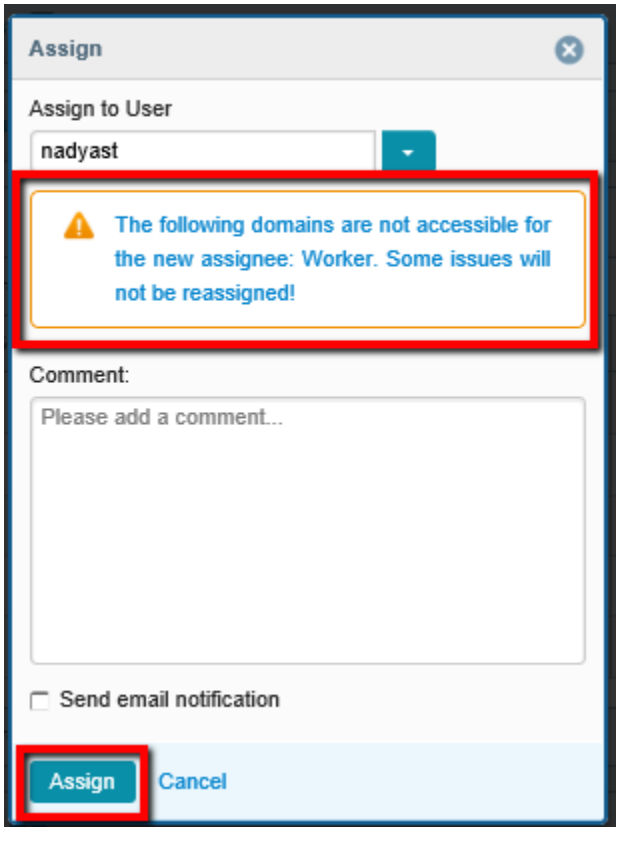

Assign
Assign to User
nadyast
Selected user has no access to domain(s):
Worker. Please select another user!
Comment:
Please add a comment...
Send email notification
Assign
Cancel

If the selected user is valid, the *Assign* button becomes available and issue(s) can be reassigned.



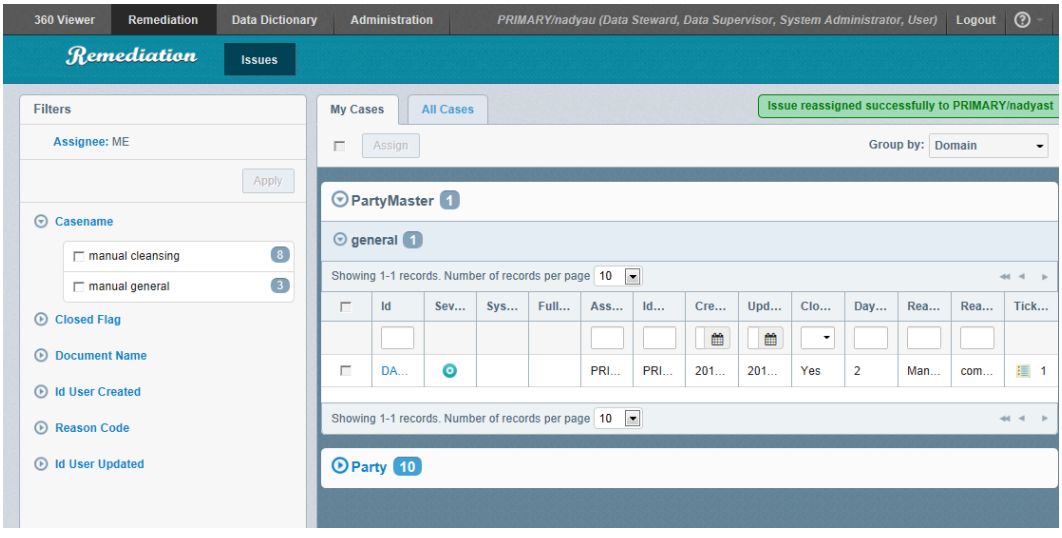
Note: If you want an assignee to be notified about the reassign activity, then the *Send email notification* check box should be selected.

If there are some cases where issues can be reassigned and some cannot (for example, selected issues belonging to different domains and the new assignee has no access to some of them), then a warning message will appear, as shown in the following image.

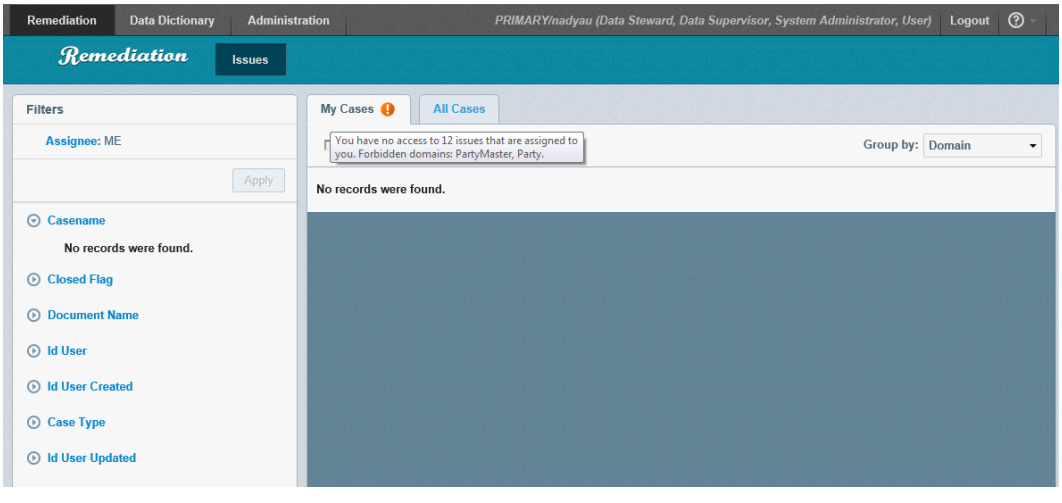


The *Assign* button remains available since issues that belong to the accessible domain(s) can still be reassigned.

After the *Assign* button is clicked, tables get refreshed in order to show the updated list of cases, and the appropriate notification message is displayed in the upper right corner of the pane.

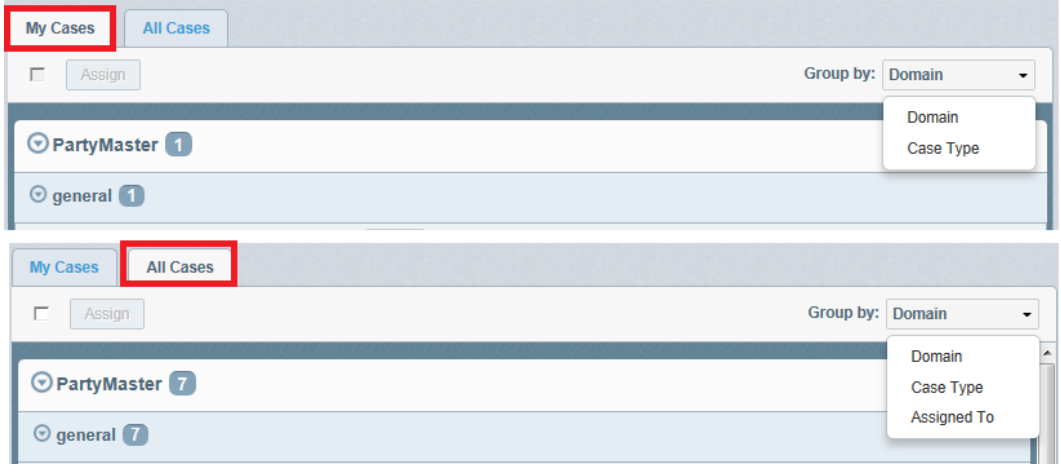


If you have a queue of issues from inaccessible domains, the notification icon will be displayed in the My Cases tab. You will not be able to view or work with those issues, but can ask the Administrator, for example, to be provided with permissions to work with certain domain(s) or reassign issues to someone else.



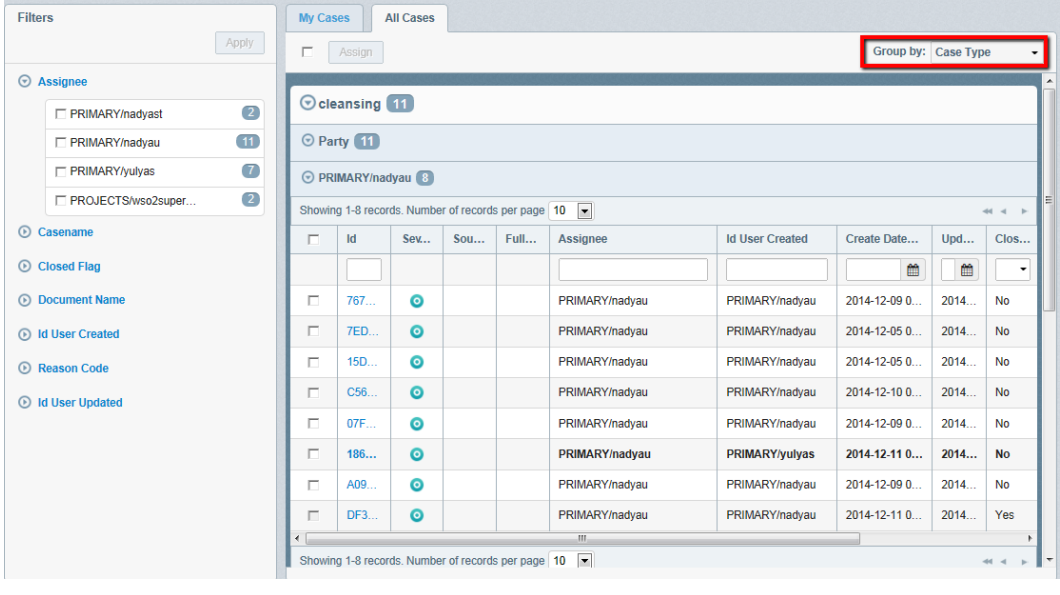
When moving the cursor over an icon, the appropriate pop-up window will be displayed.

Tables are adjustable to your requirements and can display information according to the selected grouping criteria.



When any value is selected from the *Group By* drop-down list, tables become re-grouped by the appropriate criteria. By default, cases are grouped by Domain.

Note: If filtering using the Filtering panel was applied, then records in the tables get grouped according to it.



Note: If the case is not viewed by its assignee, it is initially displayed in bold text. After the case is has been initially reviewed, the font is changed to normal text.

Override Matching Page

The Override Matching case type incorporates the handling of data sets containing potential duplicates of the same record, all of which correlate to a single real-world entity. In the Override Matching case, you are presented with a list of instances, or potential duplicates, of attribute records from multiple sources. You can then re-group the instances as needed.

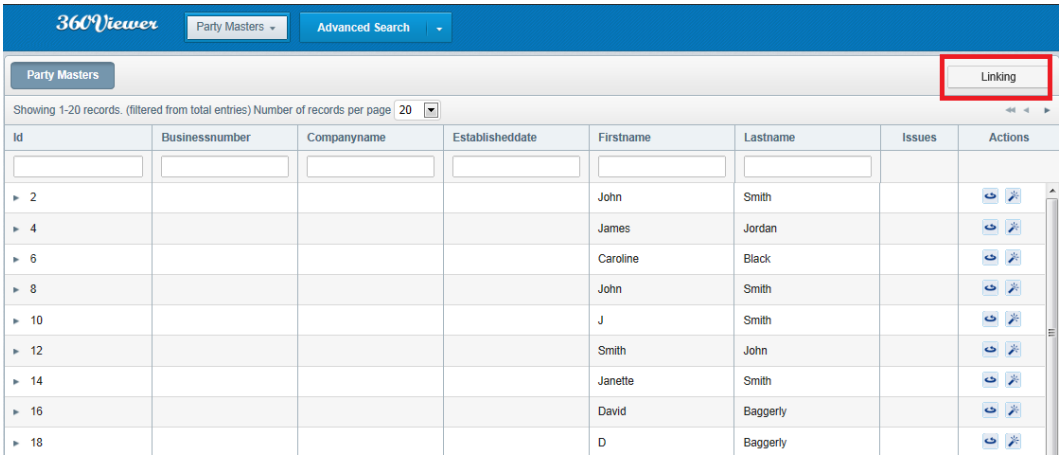
Navigation Options

There are four options you can use to navigate to the Override Matching page:

- From the Home page, to rearrange Instance records of two or more Golden records.
- From the Master Comparison page, to rearrange Instance records of one Golden record.
- Using the link from the Issues pop-up window, to view pre-created Override Matching cases (corresponding icons are displayed on Details 360, Master Comparison, and Home pages).
- From the Issues page, to view already created Override Matching cases.

To select records for the Override Matching case, click the *Linking* button in the Home page first, as shown in the following image.

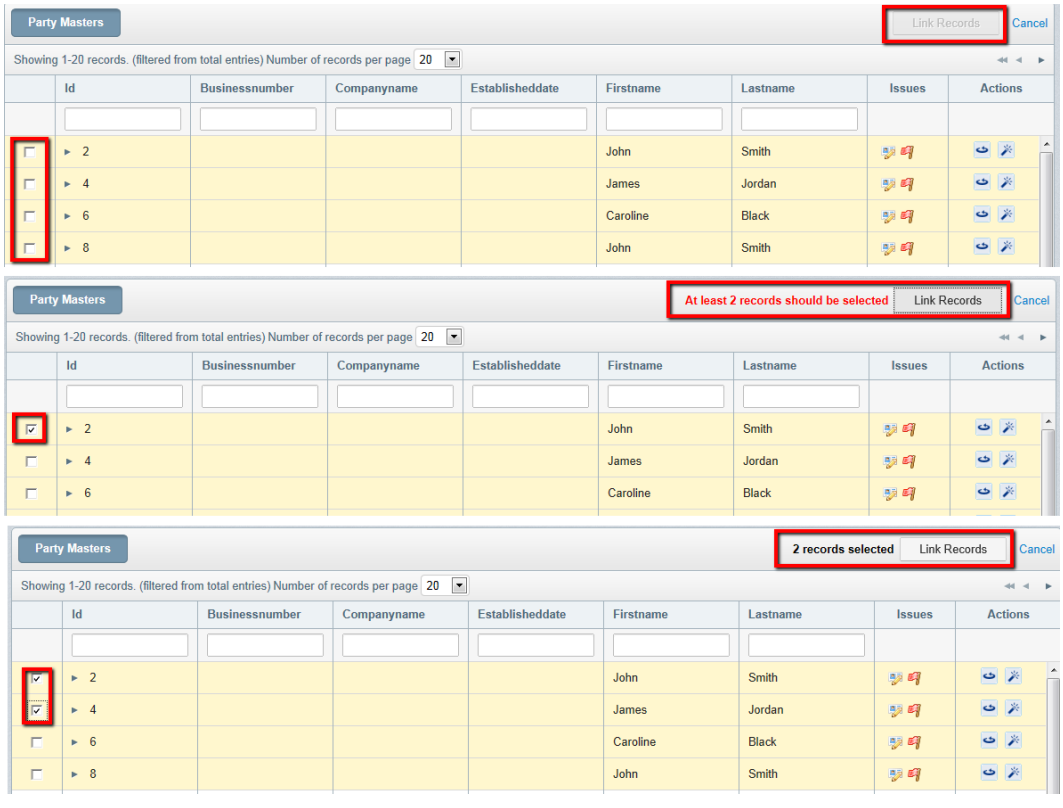
Note: The Linking button may not be available for all pages. It is pre-configured by appropriate policy.



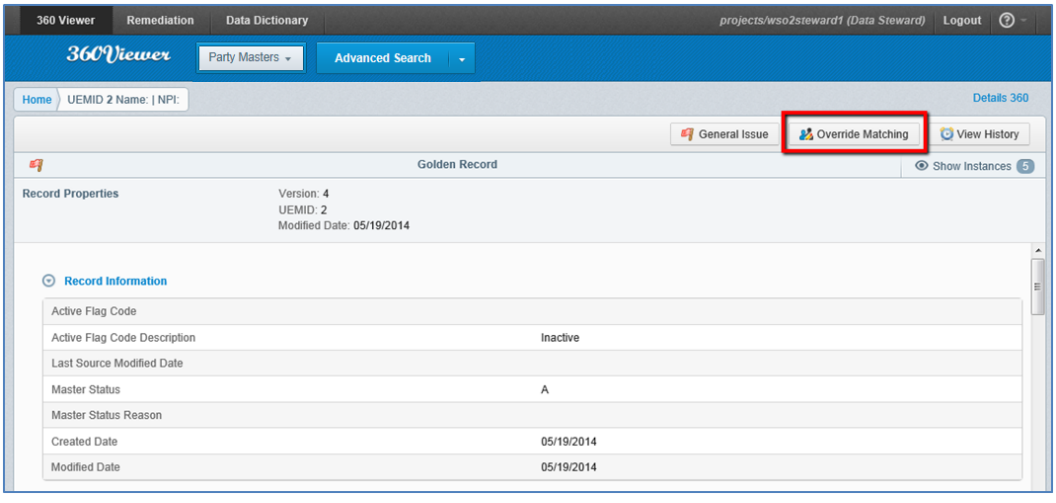
When Linking mode is enabled, you can select records based on what you want to use to create a Matching case.

Note: Any record currently under the Override matching may not be remediated under any other Override matching case.

At least two records should be selected in order to be navigated to the Override Matching page. If no records were selected, the *Link Records* button is disabled. If one record is selected, the *Link Records* button becomes available, but the notification message appears when you click on it.

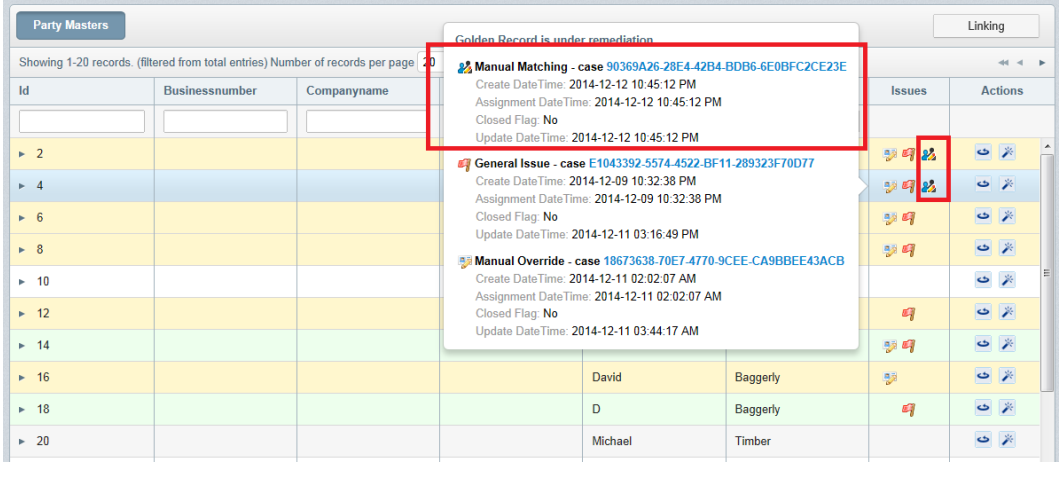


If you want to rearrange the Instance records of one Golden record, navigate to the Master Comparison page of that record and click the *Override Matching* button, as shown in the following image.



Note: If a record has only one instance record, then the Override Matching button becomes unavailable. If the record is already under the remediation process and has more than one Instance record, then the *Override Matching* button will be available for use and will lead to an opened case.

Another way to navigate to the Override Matching page is through links in the issue pop-up window (if the matching case already exists in the system).



To see the pop-up window, move the pointer over any Matching remediation icons that are displayed on Details 360, Master Comparison, or Home pages, and then click on the appropriate link. Information displayed on the pop-up window can be configured by the System Administrator.

For more information, see *Override Matching Page* on page 124.

Note: For user roles, the matching link is disabled because the user has no permissions to view or work with matching cases.

If a case is assigned to you, the Override Matching page will be displayed in Update mode, so that you can continue working with it. If it is not assigned to you, it will be set to Display mode, where no changes can be made.

You can also navigate to an already created matching case by selecting the appropriate link on the issues page.

The same method applies with links in pop-up windows. If a case is assigned to you, the Override Matching page will be displayed in Update mode, so that you can continue working with it. If it is not assigned to you, it will be set to Display mode, where no changes can be made.

Note: Closed Matching cases are displayed on the Issues page and in Remediation pop-up windows. Those cases can be opened in Display mode only.

Page Structure

The structure of the Override matching page is displayed below.

The Override Matching page is composed of the following main blocks:

- Bread crumbs
- Workspace: Golden records panel
- Workspace: Instance Details panel
- Expand/Collapse Workspace control
- Activity Stream
- Case Properties

Using bread crumbs, you can navigate to the previously visited pages.

In the Golden Records panel, you can manage group compositions such as: creating new golden records and rearranging instances between Golden records with drag and drop functionalities or context menus.

In the Instance Details panel, you can view details of several instances at a time. Instance details and panel fields can be configured through the Administration module.

For more information, see *Instance Details Panel* on page 124.

The Expand/Collapse workspace controls shows and hides the Activity stream and Case properties, and expands/collapses the Instance Details panel. When the workspace is expanded, the *Activity Stream & Properties* link will be displayed in the bottom right corner of the page. The Activity Stream & Properties link shows the Activity stream and Case properties sections.

All activities such as comments, transitions through the workflow for every attribute, general comment, and issue reassignments, and are tracked in the Activity stream.

The Case properties section includes general information about the case (assignee, created date, current status, and so on).

Group Decomposition

In the Golden records panel, the instances and their affiliation with Golden records they belong to are reflected.

Each Golden record is displayed as a container with an order number assigned for convenience. Instances are displayed as small tiles with Source system and Source object IDs on them. Each Instance record tile is displayed inside a container which corresponds to a Golden record they belong to.

On the panel, you can manage Instances and move them from one Golden record to another. Additionally, the *after edit* composition is displayed. To view the original composition (the state before any changes were made), click the *View Original Composition* button.

In the View Original Composition mode, you cannot rearrange instances and perform any other actions (except for viewing Instance details in Details panel). To go back, click the *Back to Editing* button.

Note: The View Original Composition mode is not available in Display mode.

Create new Group

In the Golden Records panel, you can create a new group to move Instances to it.

To create a new group, click the *Add New Group* button. The new empty group panel appears. You can move Instances to this panel. The golden record can be deleted if it does not contain any instances.

Rearrange instances with drag and drop

To rearrange instances between groups, you can:

- drag the instance tile from one Group container to another.
- drag the instance from the Instance details panel to the corresponding Golden record container in the Golden record panel.

When you start dragging an instance, its image is dragged (half-transparent, duplicate) and grouped where it can be dropped. It is then selected when the pointer is over the container.

When the item is dropped, it sticks to the grid of the new Group and disappears from the previous Group, so that one Instance record does not exist in two Groups. If there are more than four Instance records, the container is expanded horizontally.

Another way to rearrange instances is to drag them from the Instance Details panel.

You can drag instance record headers in the Instance details panel to the corresponding Group container. While dragging, the image of the Instance record is displayed.

When the Instance is dropped to a new Group container, it becomes a part of that Group and is removed from the Group (and corresponding container) which it belonged to before.

You can also select which Instances to be displayed in the Instance Details panel. To do that, click the *Instance Records* label, select *needed Instances* and click *Done*. After that, the table will be refreshed and only relevant Instances will be displayed.

Using a scroll bar, you can also select how many Instance records you want displayed at a time (from one to four).

Creating a case

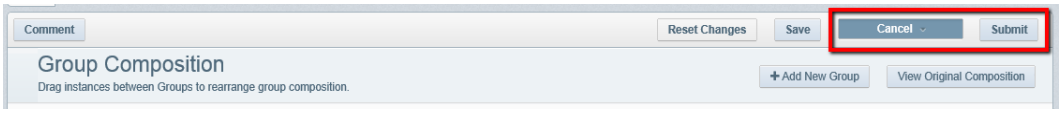
A matching case can be created after saving any activity on the page:

- Adding a comment to the case.
- Clicking the *Save* button.

After the case is saved, the Activity stream and Case properties sections become refreshed with the appropriate information, and the workflow actions drop-down list appears beside the *Save* button. The fields of the Case Properties section can be configured through the Administration portal.

For more information, see *Case Properties Panel* on page 125.

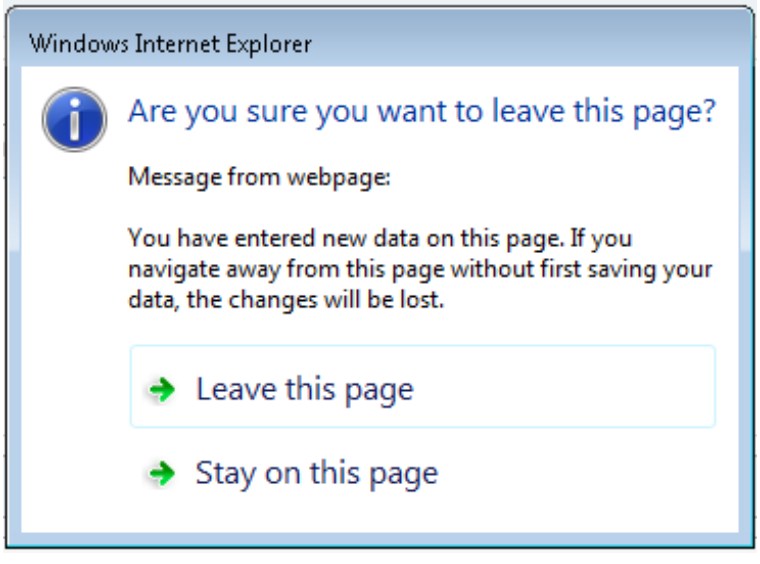
The Workflow actions drop-down list contains values available for current roles (for example, Data Stewards can send cases for approval and Data Supervisors decide whether to approve or reject it). After selecting the appropriate value, the *Submit* button becomes available, so that a case could be sent to the workflow.



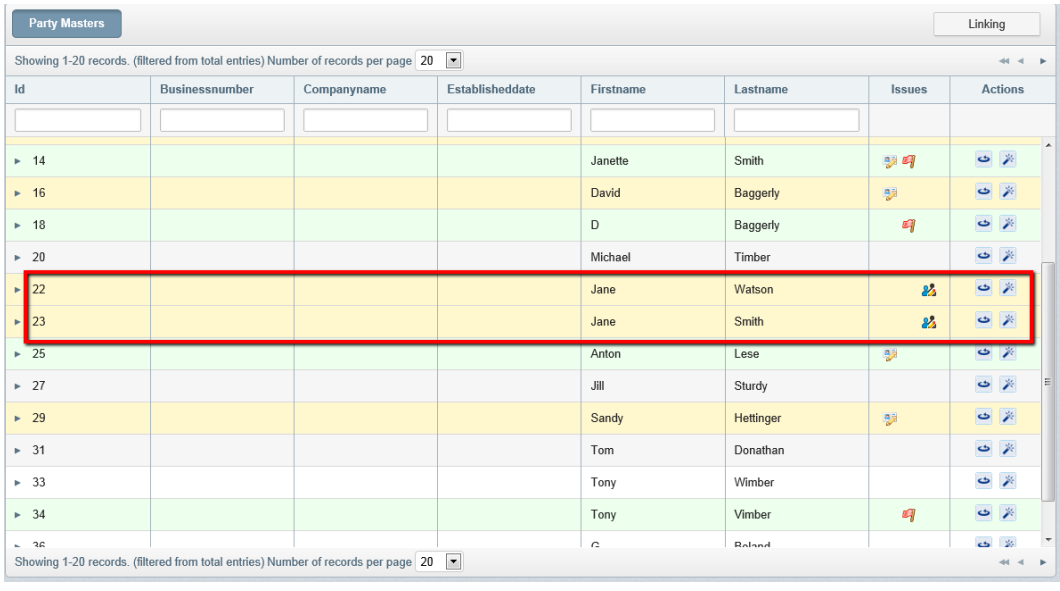
After the case is sent to the workflow, a notification message is displayed.

To discard all changes made from the last save action, click the *Reset changes* button.

If you have some unsaved changes made on the page, and try to navigate outside of it, a warning dialog box will appear, as shown in the following image.



The Created Override Matching case is displayed on the Home page accordingly:

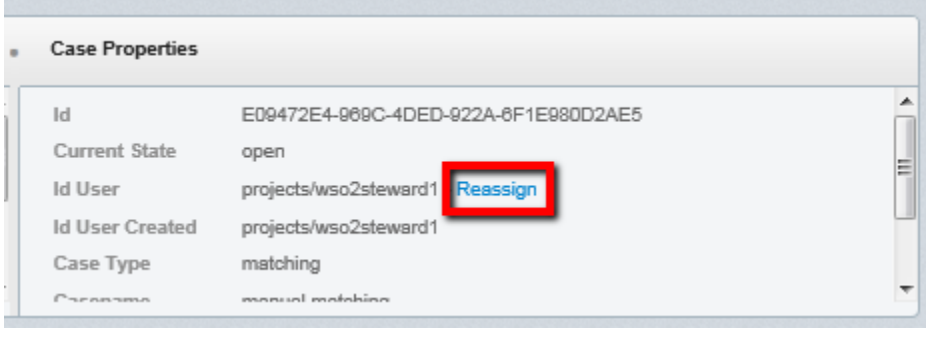


The row with opened cases is highlighted in amber color and the appropriate icon is displayed.

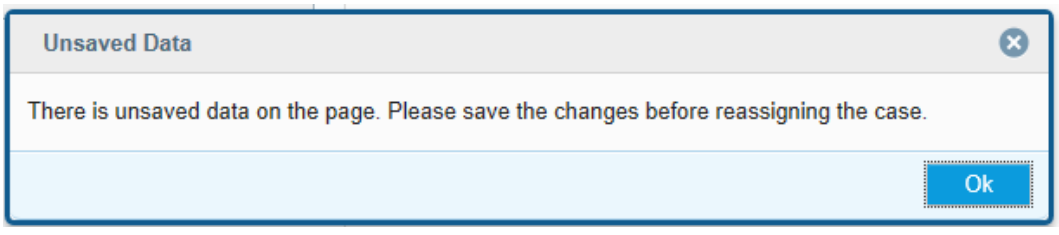
Reassigning a case

If you want to reassign the case to someone else, click the *Reassign* link in the Case Properties panel.

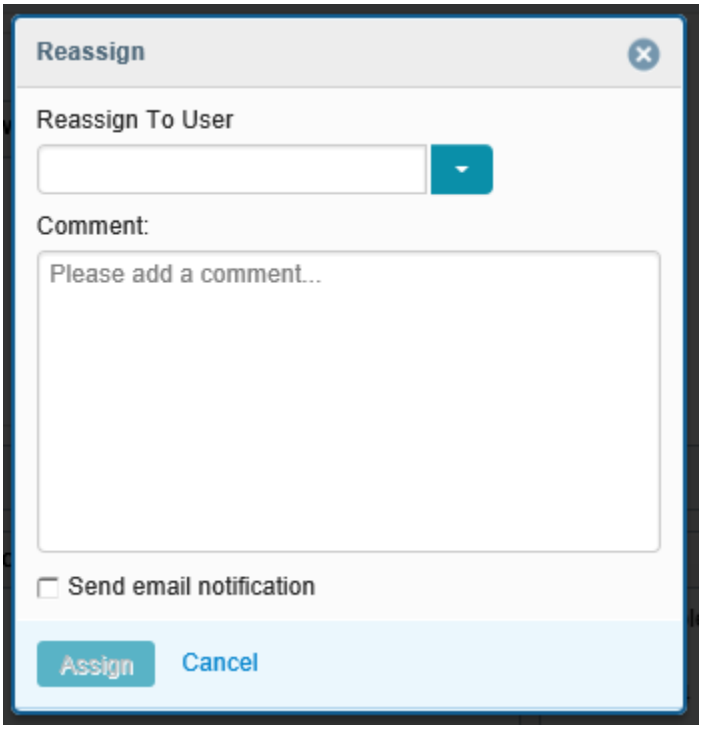
Note: The *Reassign* link is not available for closed cases.



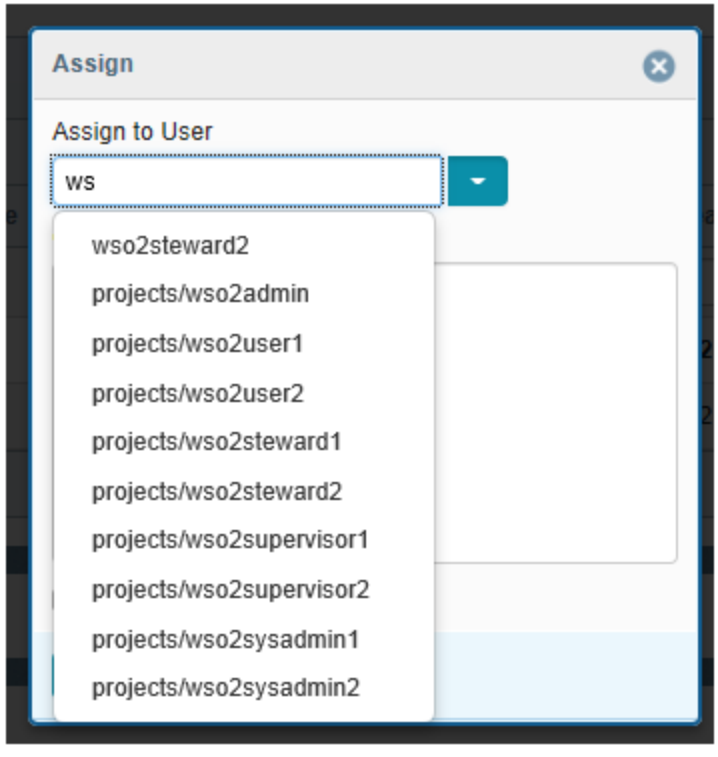
If there are any unsaved changes on the page, and you click the *Reassign* link, then the warning dialog appears, indicating that cases with unsaved changes could not be reassigned.



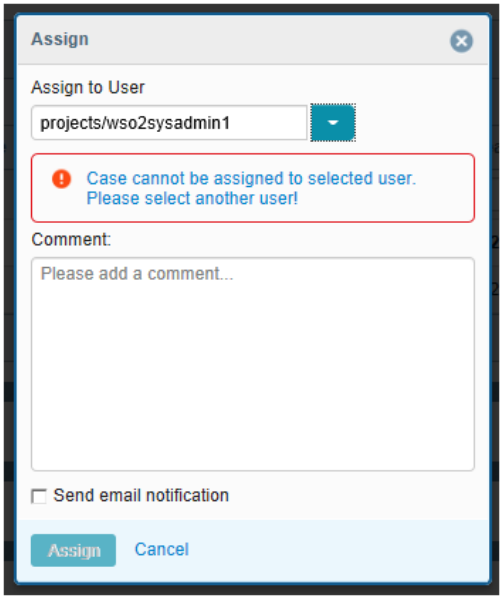
When there is no unsaved data on the page and the link is clicked, the Reassign dialog box appears. The functionality of it is similar to the Assign dialog on the Issues page.

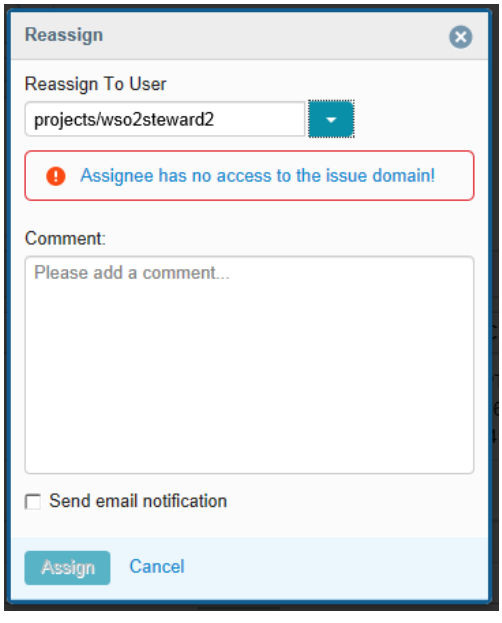


A list of users are available in the *Assign to User* drop-down list. When you start typing in the field, data is filtered dynamically to display only the relevant information.

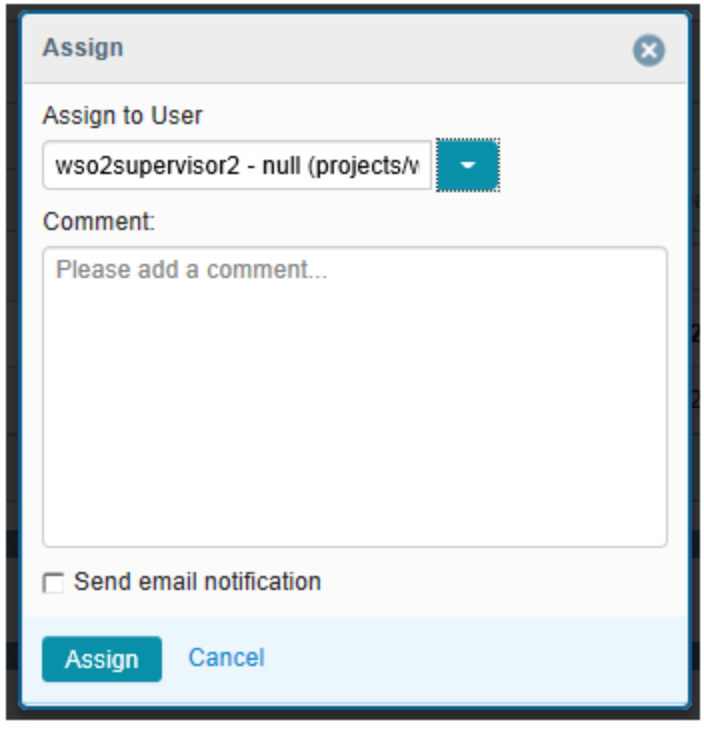


If a case cannot be assigned to the user selected from the list (for example, because the selected user has no permissions to resolve cases, and so on), or the entered data finds no matches in the database, the appropriate validation message is displayed.





If the selected user is valid, the *Assign* button becomes available and the case(s) can be reassigned.

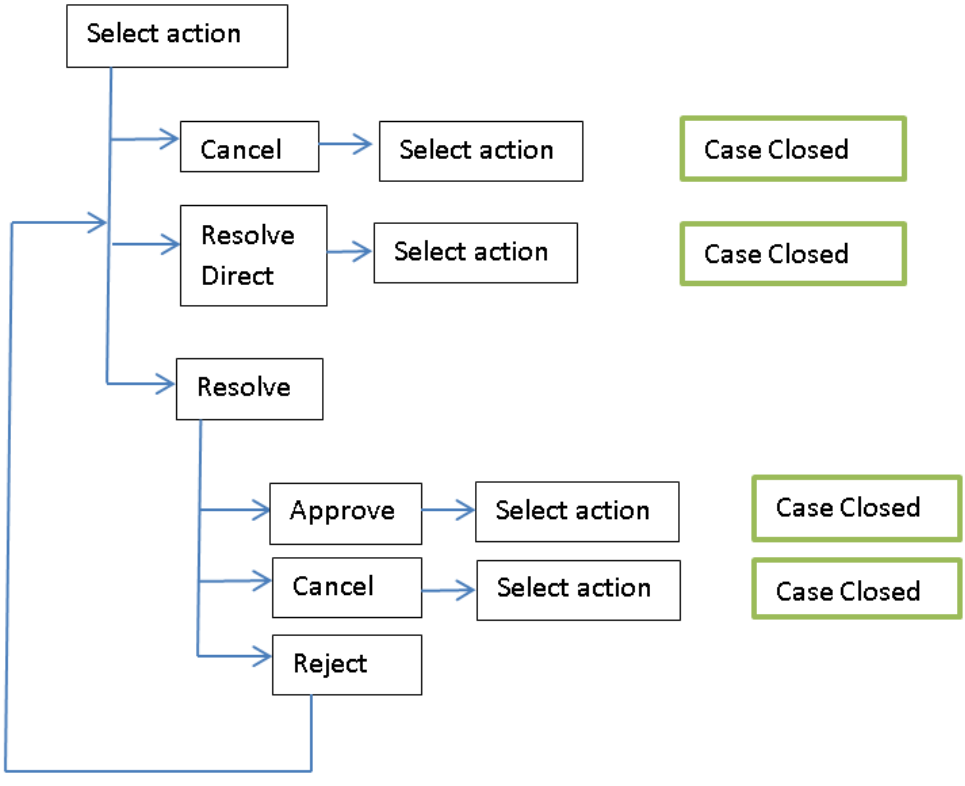


After clicking the *Assign* button, you are redirected to the Issues page since the case is no longer your own.

Note: Select the *Send email notification* check box if you want an assignee to be notified about the reassign activity.

Workflow schema

The schematic workflow of the Override matching case and workflow actions available per role are shown in the following image.

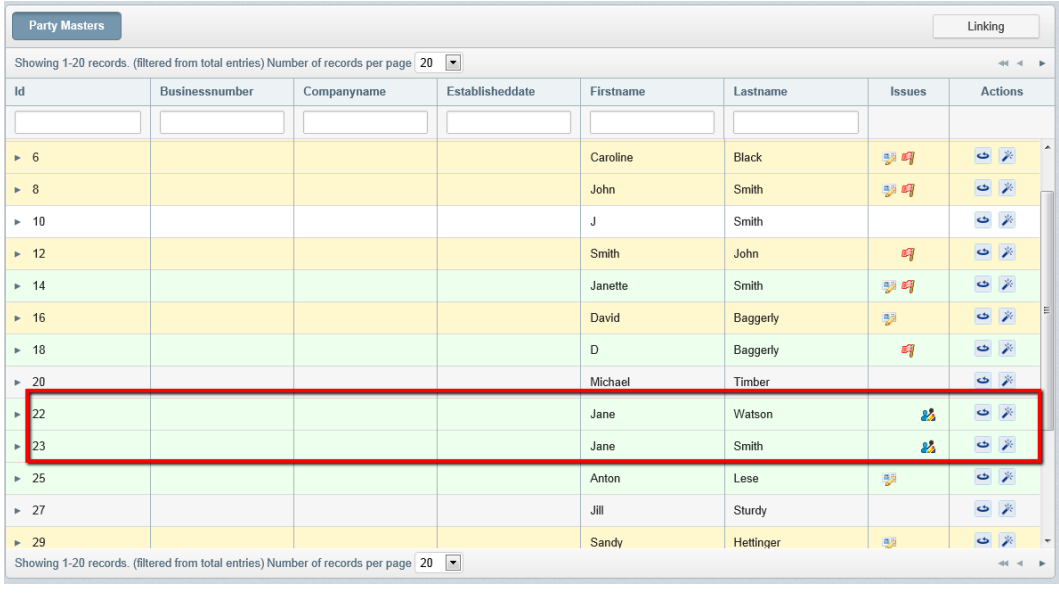


When the case is closed with the help of the **Resolve Direct** or **Resolve -> Approve** workflow actions, the re-composition of Golden records is performed according to changes made in the case.

If the case is closed with the help of any other workflow actions displayed above, then the re-composition of Golden records is not performed.

	Override Matching
Data Steward	Resolve, Cancel
Data Supervisor	Approve, Reject, Cancel, Resolve Direct

When the case is closed, records that were under the matching remediation process are highlighted on the Home page with green color. A new matching remediation process can be started for them.



Manual Cleansing Page

Manual Cleansing issues involve the resolution of problems with missing or invalid data and the review of changes suggested by an automated data quality process (like incorrect, ambiguous, missing data, and so on).

A cleansing case consists of a record which attributes require manual editing. Each edit can be sent through workflow separately because different attributes of the record may be in different states.

You can also leave a comment on particular attributes or view and resolve issues/errors that arrive from an automated cleansing process.

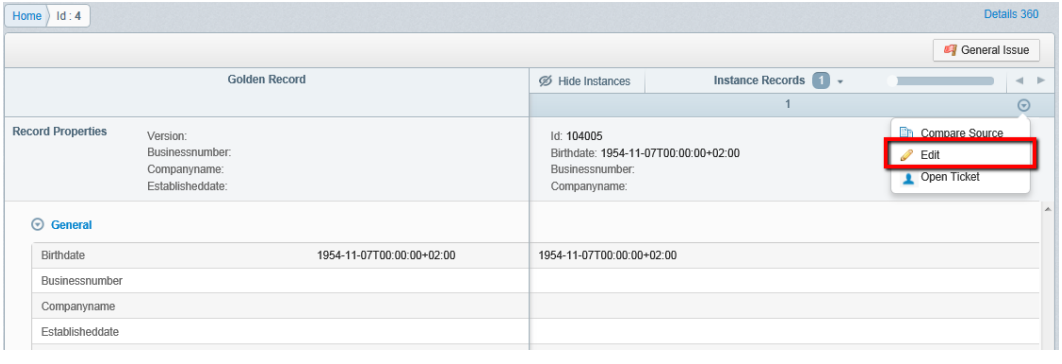
Navigation Options

There are three options you can use to navigate to the Manual Cleansing page:

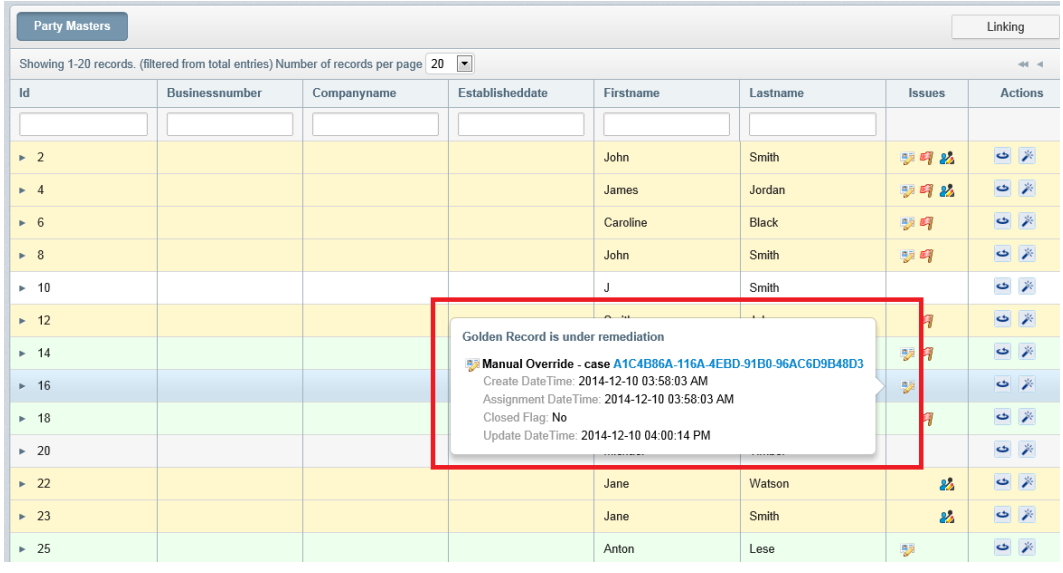
- From the Master Comparison page, to create a new cleansing case through the *Edit* menu item.
- Using a link from the Issues dialog to view already created Manual Cleansing cases. The appropriate icons are displayed on the Details 360, Master Comparison, and Home pages.
- From the Issues page, to view already created Manual Cleansing cases.

Note: Manual Cleansing cases can be opened only for Instance records. Any record currently under Manual Cleansing remediation may not be remediated under any other Manual Cleansing case.

If a you want to open a cleansing case, navigate to the Master Comparison page of that record, expand the Instance records section and select *Edit* from the menu list for or appropriate Instance, as shown in the following image.



Another way to navigate to the Manual Cleansing page is through links in the Issue pop-up window (if the cleansing case already exists in the system), as shown in the following image.

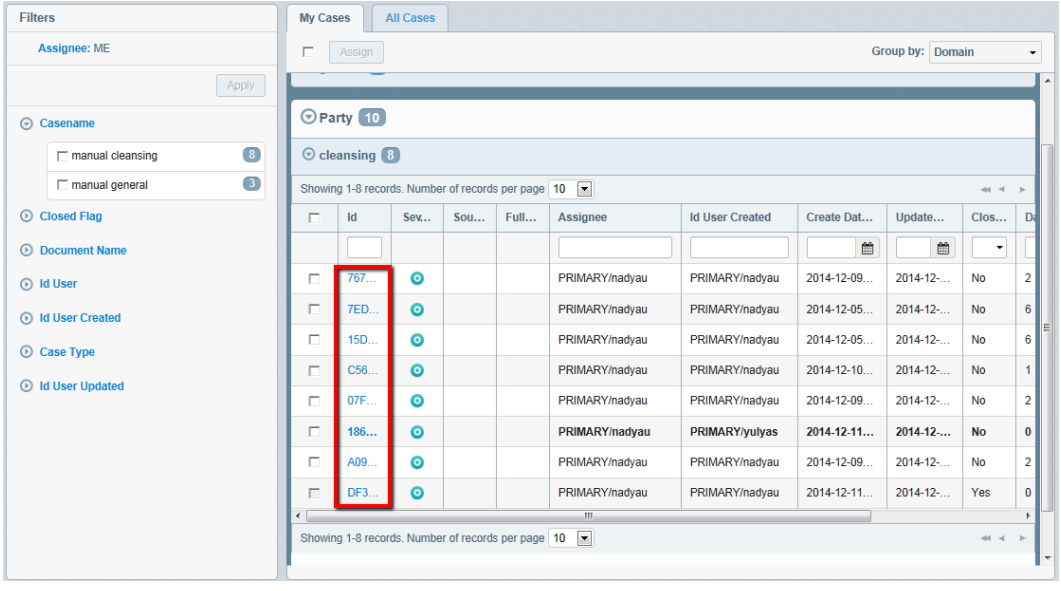


In order to see the pop-up window, use the pointer over any cleansing remediation icons that are displayed on Details 360, Master Comparison, or Home pages, and then click the appropriate link.

Note: For User roles, the Cleansing link is disabled, because the user has no permissions to view or work with cleansing cases.

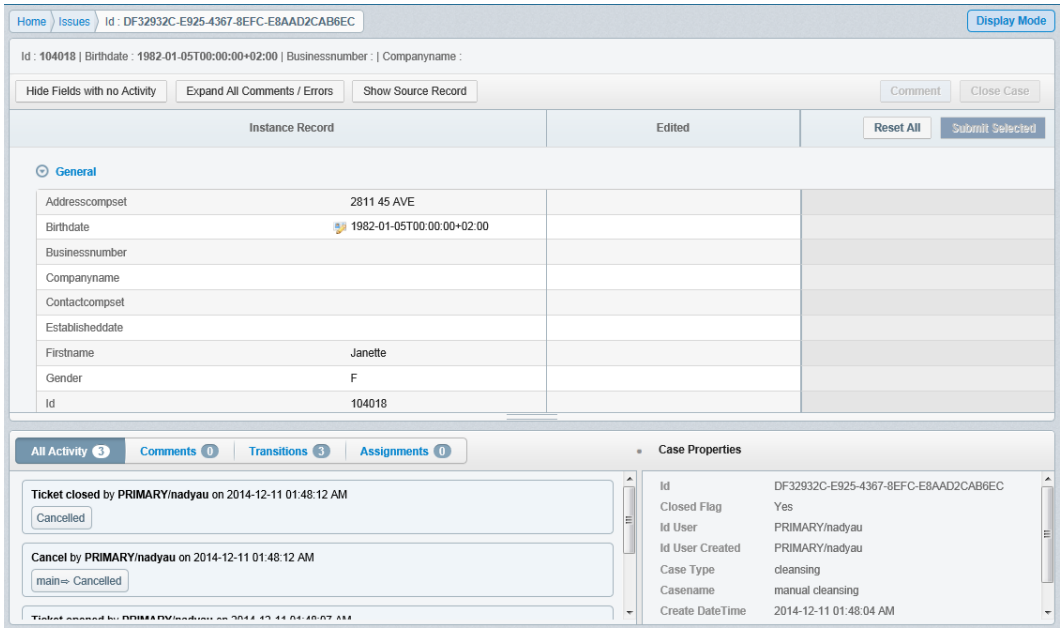
If a case is assigned to the current user, the Manual Cleansing page will be displayed in Update mode, so that the user can continue working with it. If it is not assigned to the current user, it will be set to Display mode, where the user can make no changes.

The last way to navigate to an already created cleansing case is to select the appropriate link on the Issues page.



The same method applies as with links in pop-up windows. If a case is assigned to the current user, the Manual Cleansing page will be displayed in Update mode, so that the user can continue working with it. If it is not assigned to the current user, it will be set to Display mode, where the user can make no changes.

Note: Closed Cleansing cases are displayed on the Issues page and in Remediation pop-up windows. Those cases can be opened in Display mode only.

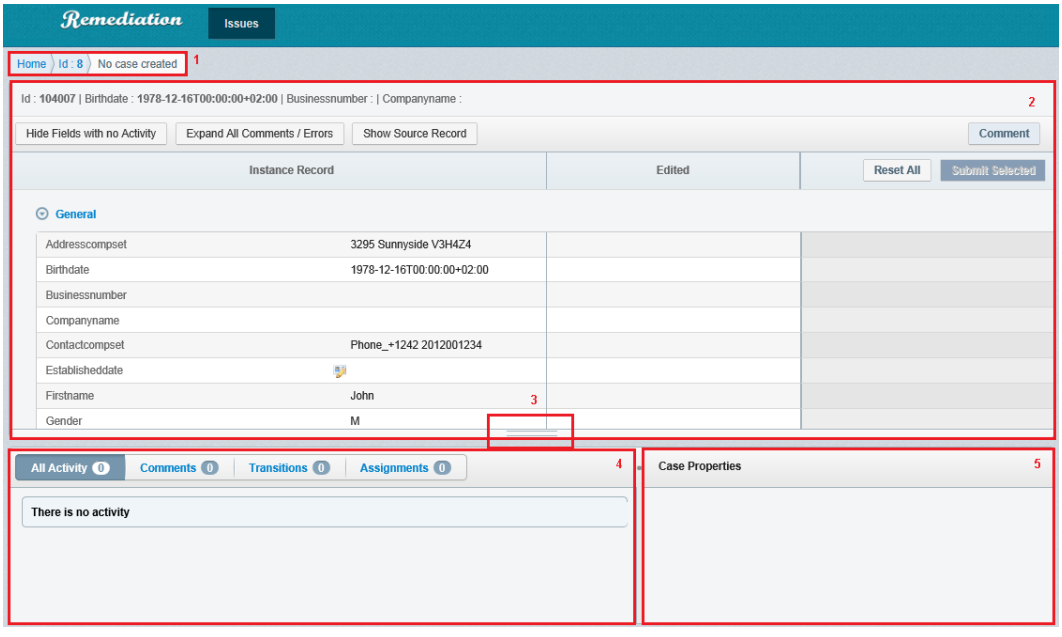


Page Structure

The Manual Cleansing Case page is composed of the following main blocks:

1. Bread crumbs
2. Workspace
3. Expand/Collapse Workspace control
4. Activity Stream

5. Case Properties



Using bread crumbs (1), you are able to navigate to the previous visited pages.

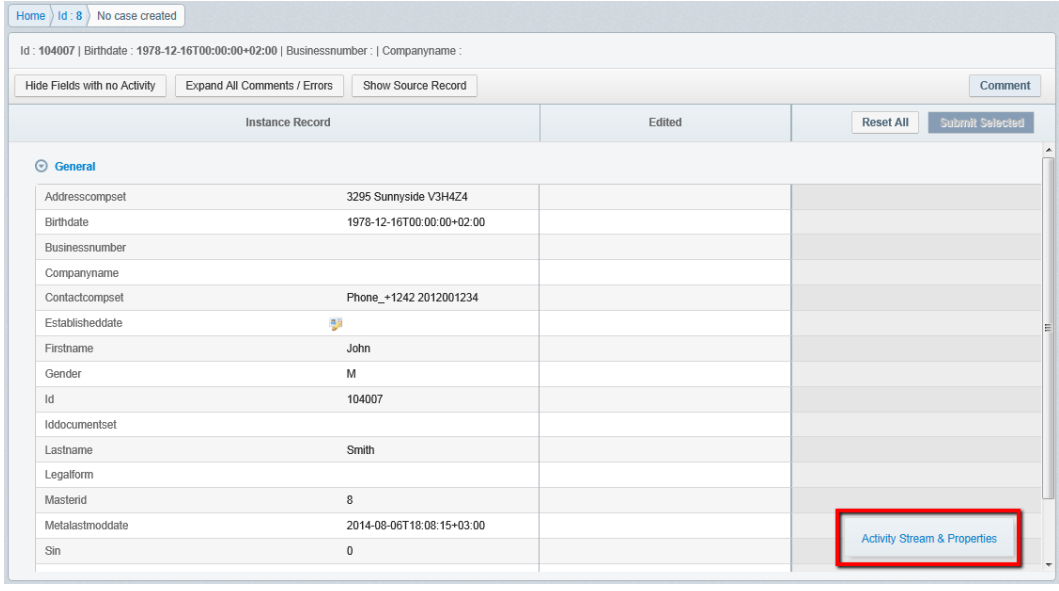
In the Workspace (2), you can edit the values of attributes, add comments to attributes, and send the changes through a workflow.

For manual cleansing cases in the Workspace, the Instance record attributes are displayed as well as Edited values columns and workflow actions. The fields of the Workspace panel can be configured using the Administration module.

For more information, see *Workspace Panel* on page 127.

By default, the workspace is collapsed and only first main important attributes are displayed.

The Expand/Collapse Workspace control (3) hides and shows Activity stream and Case properties and expands/collapses the Workspace. When the workspace is expanded, the *Activity Stream & Properties* link is displayed in the bottom-right corner of the page to open Activity stream and Case properties sections.

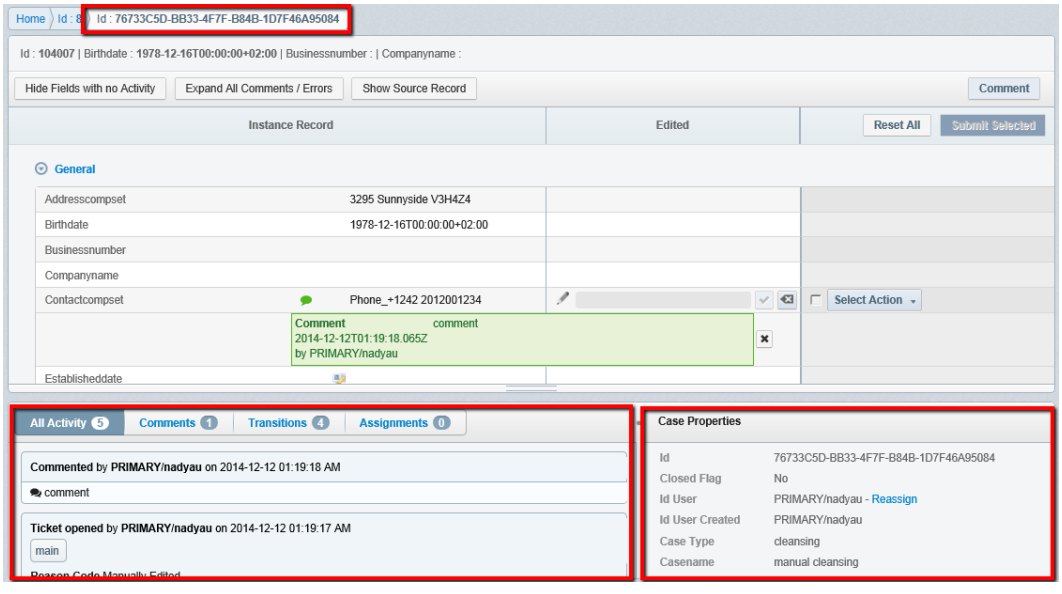


Below the Workspace, Activity stream (4) is displayed. All activities such as comments and transitions through the workflow for every attribute, general comment, and reassignment issues are tracked in Activity stream.

Case properties (5) include information on the case (assignee, created dates, and so on).

Creating a Case

In order to create Manual cleansing, case comments should be added, and attributes should be edited. After the case is created, the Activity Stream and Case Properties sections gets refreshed and display relevant information. IDs of the case are set in the bread crumbs as well.

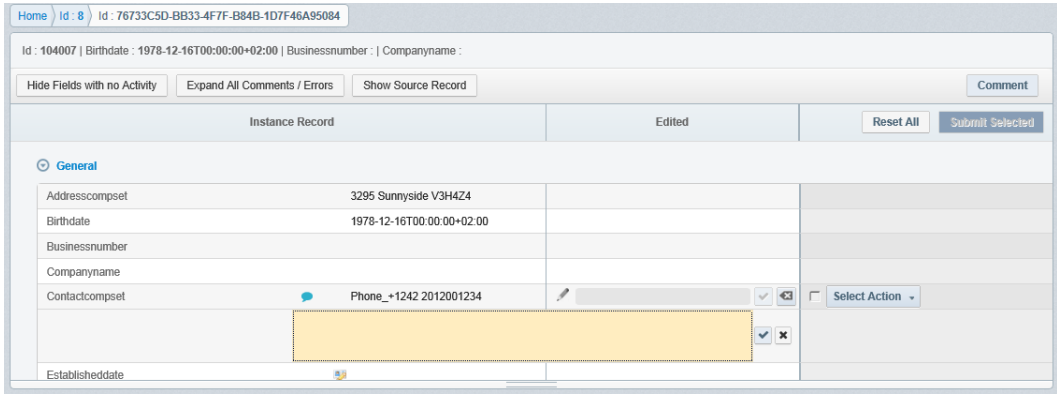


The fields of the Case Properties section are configurable through the Administration portal.

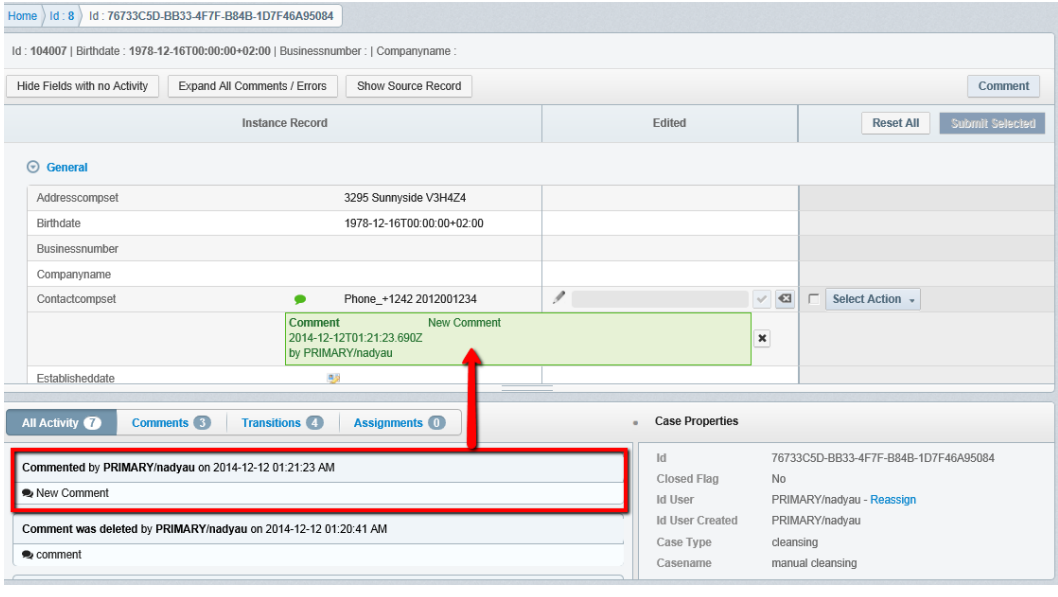
For more information, see *Case Properties Panel* on page 129.

Adding Comments on Attributes and the Whole Case

You can comment on any data attribute. When you move the pointer over the Original Data value or label, the *Add comment* icon appears. When you click on the icon, the *Add comment* overlay is displayed.



You can enter text and save a comment by clicking on the appropriate *Save* icon. The comment will then be displayed in the Activity Stream and can be viewed when clicked on the *Add a comment* icon. The comment will be displayed in the expandable area below the row, as shown in the following image.

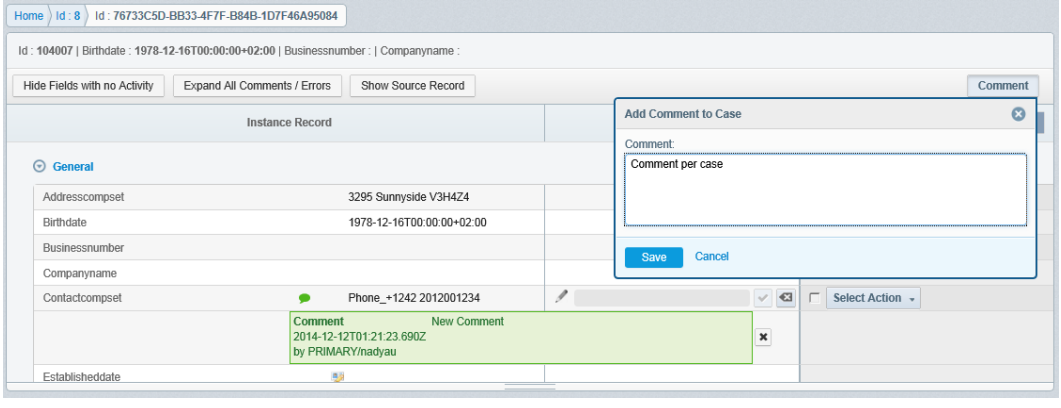


Note: When a comment is not yet saved, the *Add comment* icon is blue and the comment box is yellow. When the comment is saved, the icon and box are both green.

Comments for attributes can be *updated* or *deleted*. In order to update the already saved comment, click anywhere in the Comment box, and the comment text will be editable again. If you want to delete an in-line comment, just click the Delete (*X*) icon.

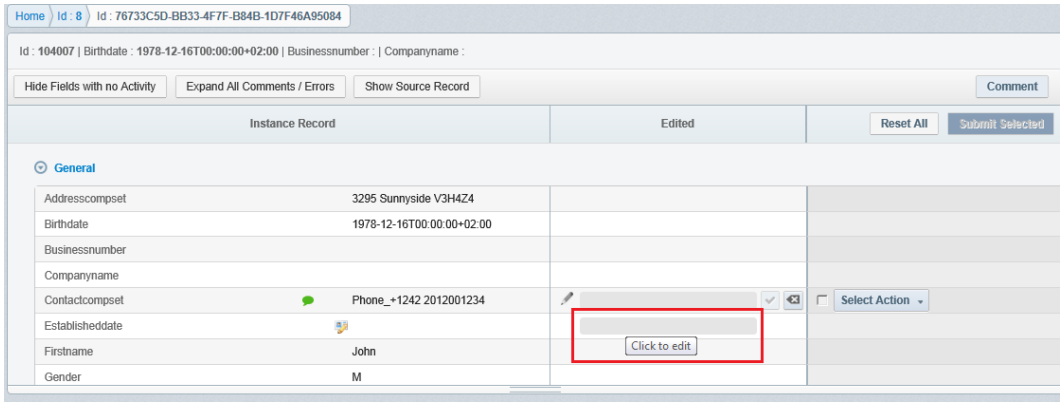
Note: Every comment creates a ticket that is saved in the database. Tickets cannot be deleted manually, and can only be closed by the workflow. As a result, the Delete option only erases the value of the edit, but does not delete the ticket itself.

You can optionally enter a global comment for the whole case by clicking the Comment button. It will appear in the Activity stream.



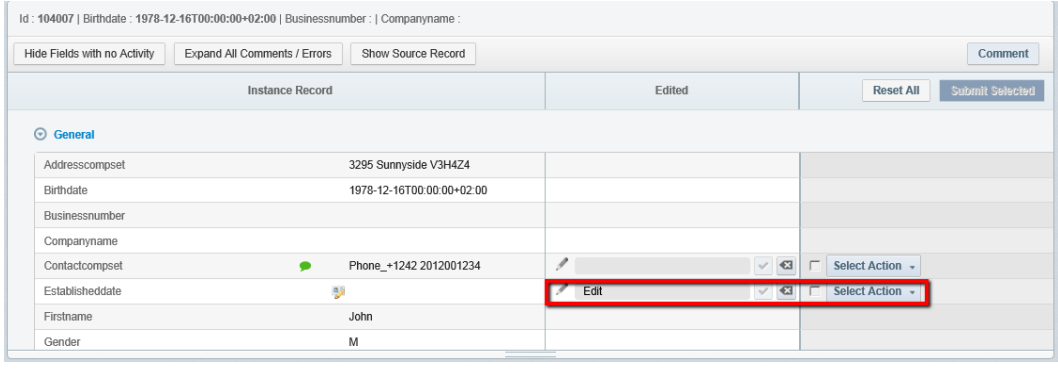
Editing Attributes

Edit column by default is empty until you edit the values manually. The edit functionality is immediately seen when you move the pointer over the editable fields. The fields are highlighted and the tooltip (*Click to edit* button) is displayed.

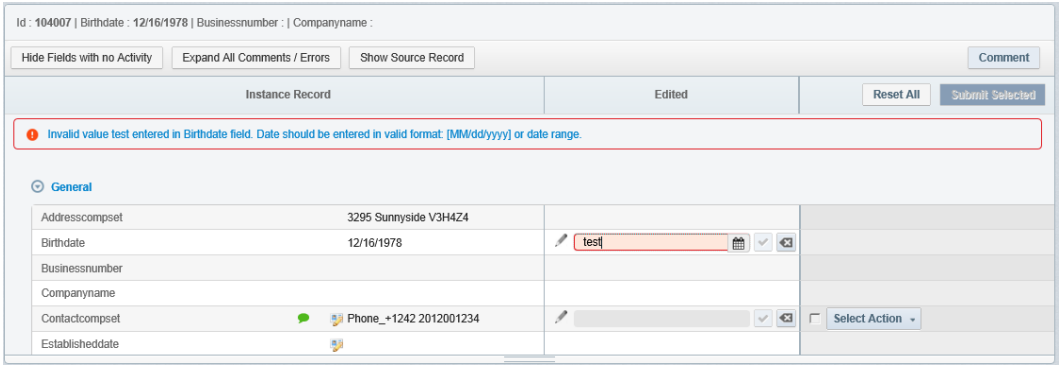


When the button is clicked, the edit text field is displayed instead of the empty cell. You can close the text fields without any changes made, just by clicking outside the field.

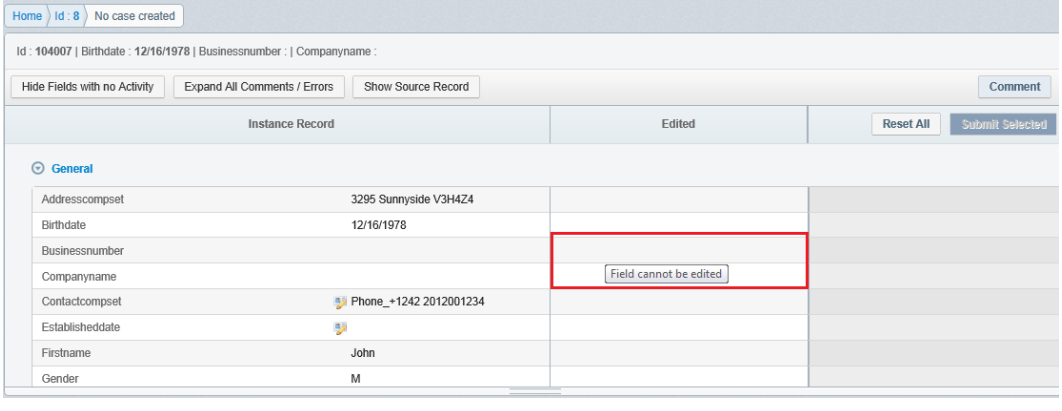
When you click the *Save* icon for the edited field, the Workflow actions drop-down list appears, as shown in the following image.



Before saving the changes, the edit must first get validated. If validation fails, the appropriate message is displayed and edits cannot be saved.

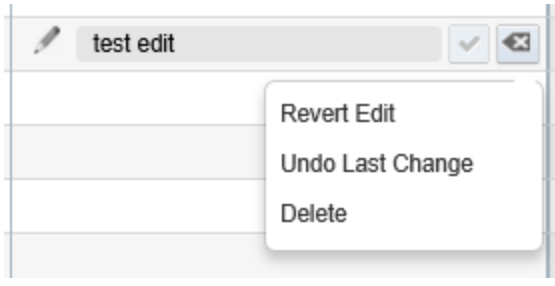


You can also prohibit the editing of certain fields. It can be done using the Administration portal. For more information, see *Case Properties Panel* on page 129. When the field cannot be edited, it is disabled, and the appropriate message is displayed, as shown in the following image.



A single edit may be reverted with the *Revert Edit* option. However, the last made change may be undone.

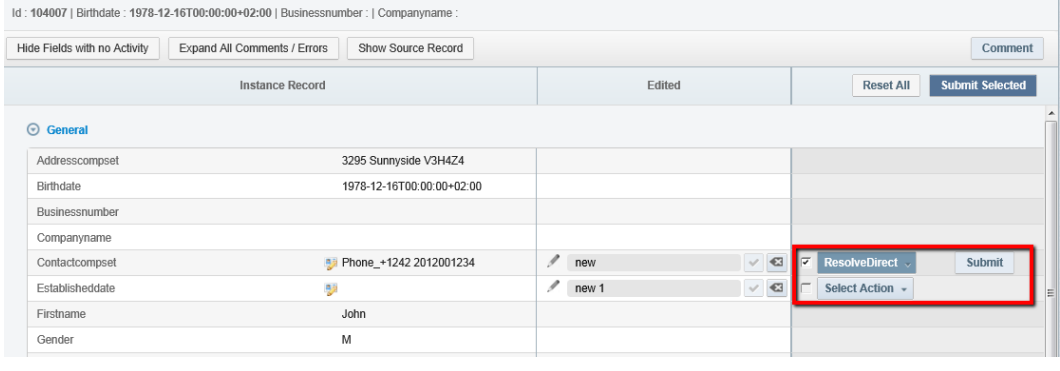
These options are accessible from the context menu which appears when the Delete (*X*) icon is clicked. Also, the value of the edit may be deleted, when the *Delete* option is selected.



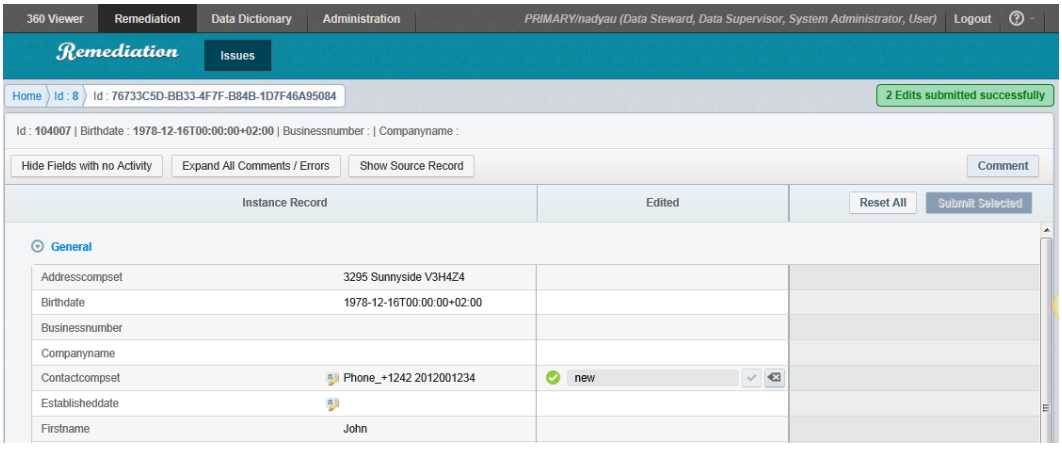
Note: Every edit creates a ticket that is saved in the database. Tickets cannot be deleted manually. They can only be closed by the workflow. As a result, the *Delete* option only erases the value of the edit, but does not delete the ticket itself.

Submitting Comments/Edits to the Workflow

The comments/edits are not sent to workflow until you select a necessary workflow action in a row and click the *Submit* button. To select an action, you must select a value from the drop-down list, and then click Submit when it appears. To clear the action, you can select the *Select action* value (the *Submit* button will disappear).

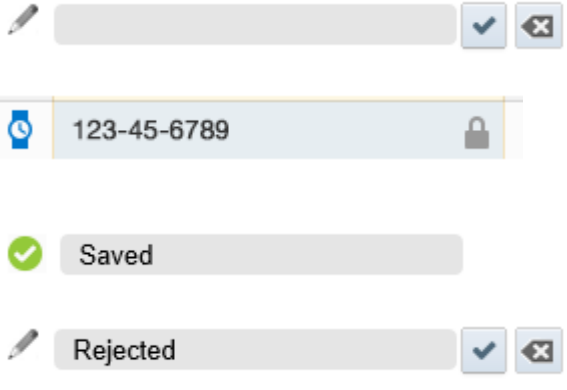


You can use the *Submit* buttons to make transitions one-by-one. When the action is selected, the check box next to the action is selected. It is used for bulk transitions. When workflow actions are selected for several edits, the *Submit Selected* button becomes available and can be used to submit several values at once. When actions are submitted, the appropriate notification is displayed in the upper right corner of the screen.



All selected transitions that have not been submitted yet can be reverted with the *Reset All* button. The Reset All action does not apply to changes made to the values.

Fields in the Edited column are displayed differently according to the workflow state they are in:



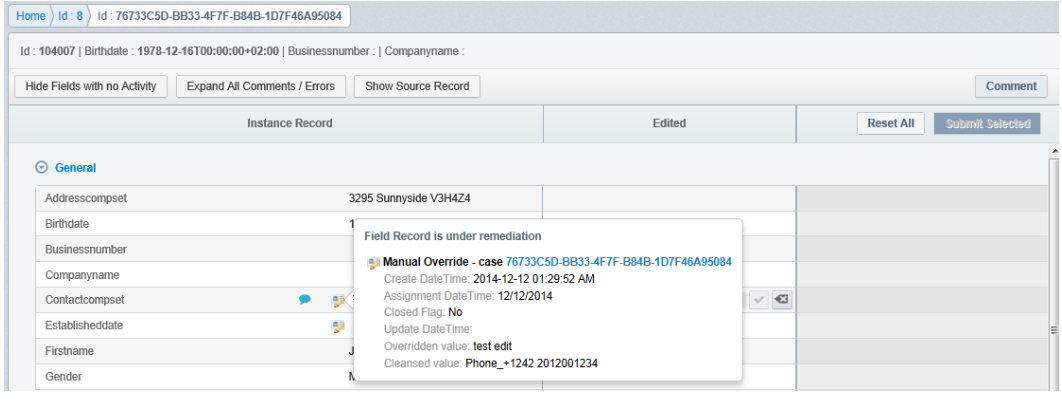
When the field is being edited and not sent to the workflow yet.

When the edited field is sent to the workflow and is waiting for approval or rejection. It cannot be edited.

When the edited field is approved. It cannot be edited.

When the edited field is rejected and goes back to the creator of the edit, so it can be edited.

After comments and edits are saved, and the page is refreshed, the remediation icon appears for the appropriate field(s). A pop-up window with short information appears when you move the pointer over the icon, as shown in the following image.

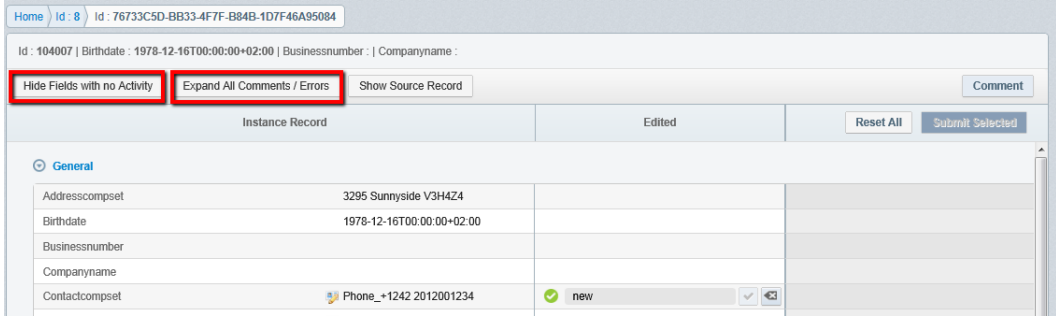


Viewing Comments/Edits/Source Record

To view only attributes that need actions from a user, you may use the *Hide Fields with no Activity* switch. When this switch is activated, only those attributes are displayed that:

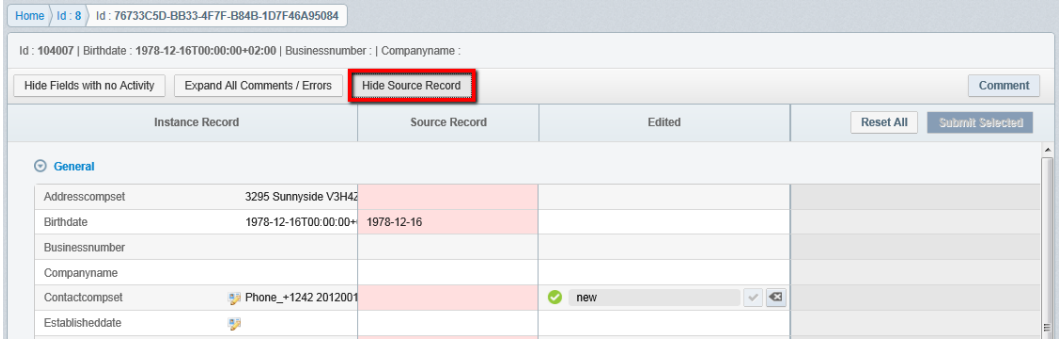
- Have manual edits.
- Have comments.
- Have issues (errors) from automated processes.

For convenience, you can expand all the comments, errors, and notifications for all attributes using the *Expand all Comments/Errors* button.



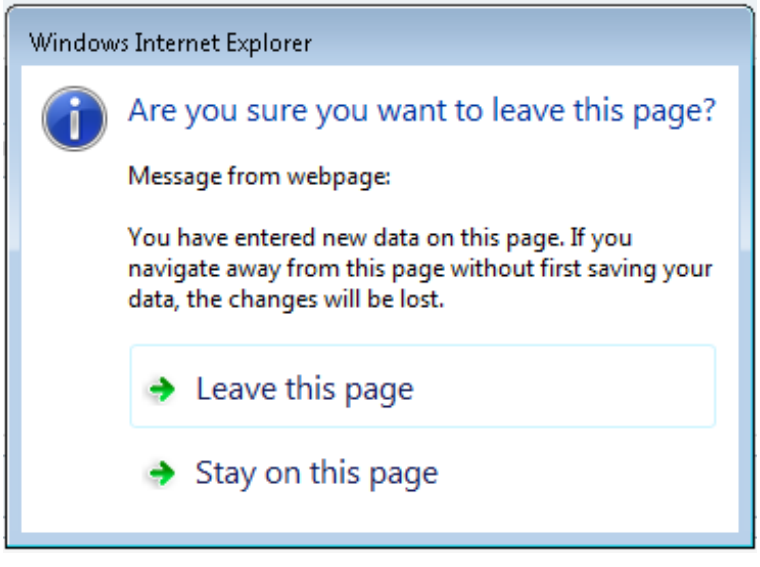
Once clicked, the buttons change their names, from *Hide fields with no Activity* to *Show All fields*, and from *Expand all Comments/Errors* to *Collapse all Comments/Errors*, so you can decide what information you wish to see.

You can use the *Show Source Record* button when you want to compare values of Instance and Source records. Once clicked, the values of the Source records appear to the right of the values from the Instance record, and the button changes its name to *Hide Source Record*. Values of the Source record that differ from values of the Instance record are highlighted in pink, and standardized values are highlighted in amber, as shown in the following image.

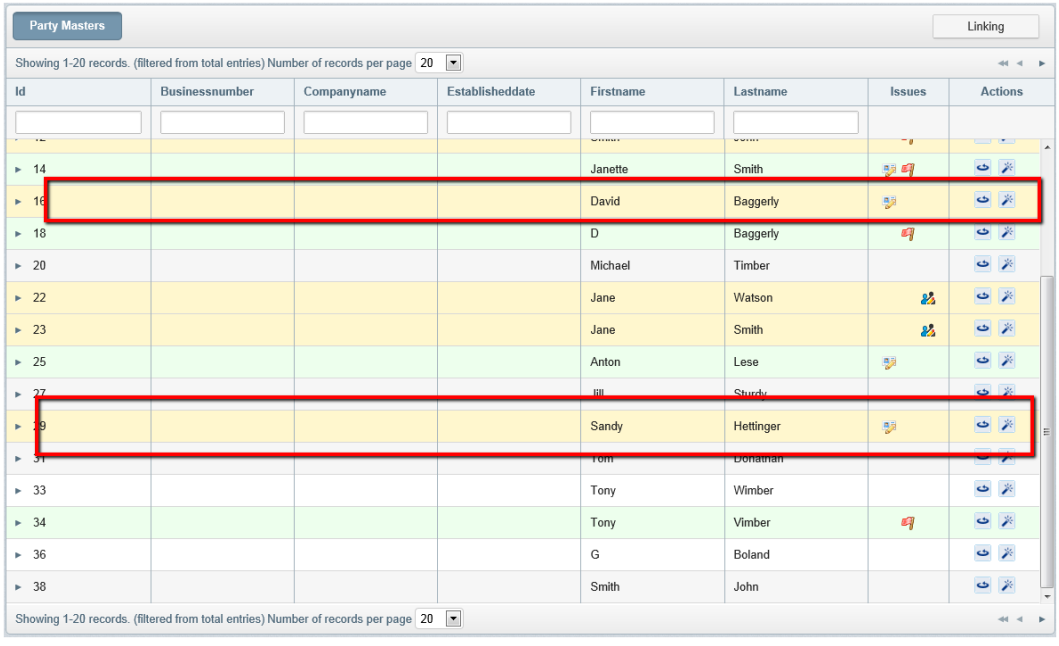


Note: Values of a Source record cannot be overridden. Only values of the Instance record are included in the workflow.

When you have some unsaved changes made on the page, and try to navigate outside of it, a warning dialog will appear, as shown in the following image.



The created Manual Cleansing case is displayed on the Home page accordingly, as shown in the following image.

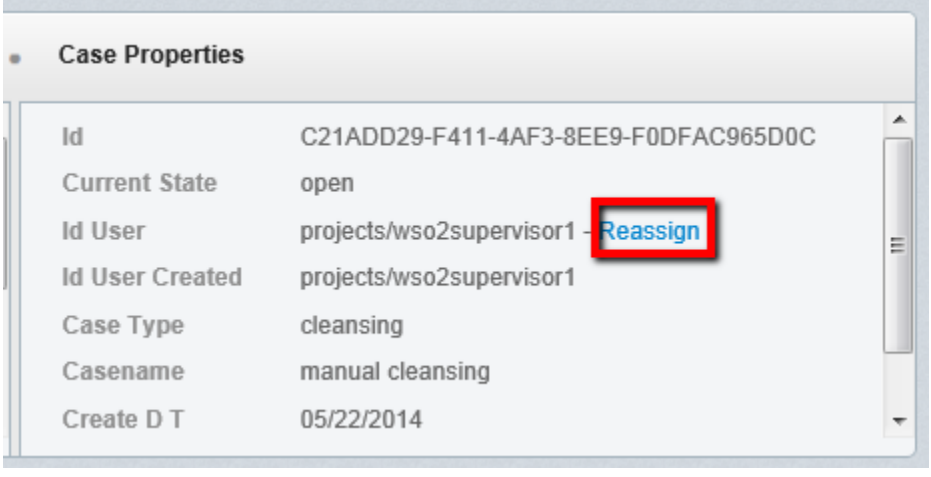


The row with an open case is highlighted in amber, color and the appropriate icon is displayed.

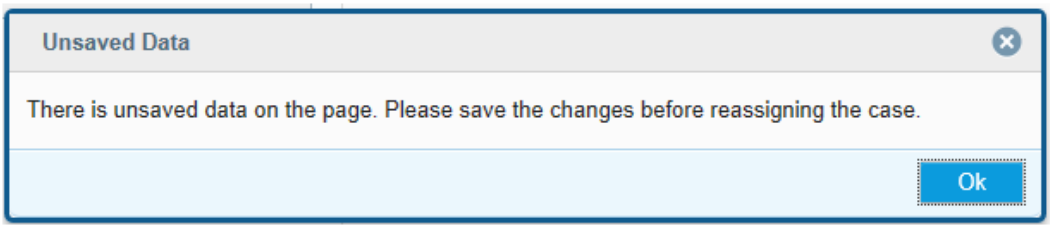
Reassigning a Case

If you want to reassign the case to someone else, you can click the *Reassign* link in the Case Properties panel.

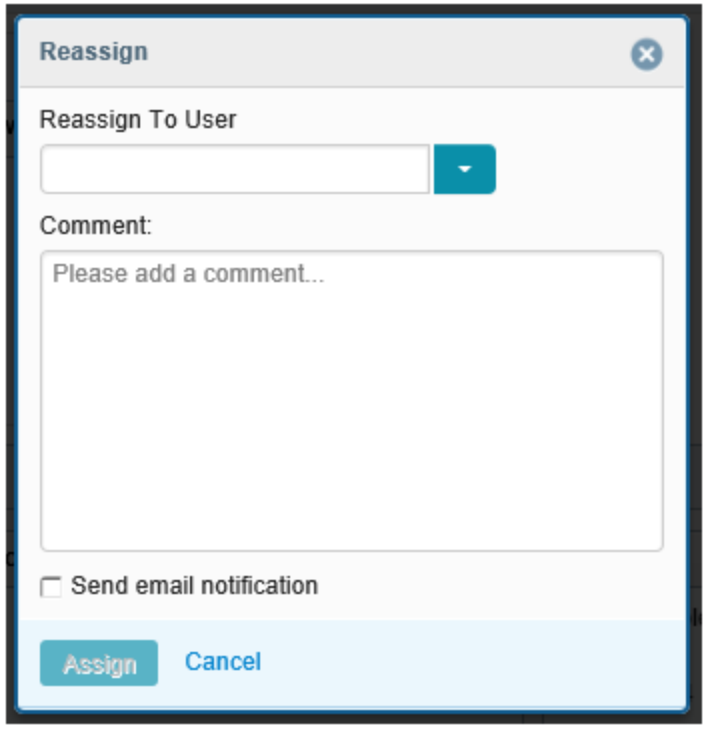
Note: The *Reassign* link is not available for closed cases.



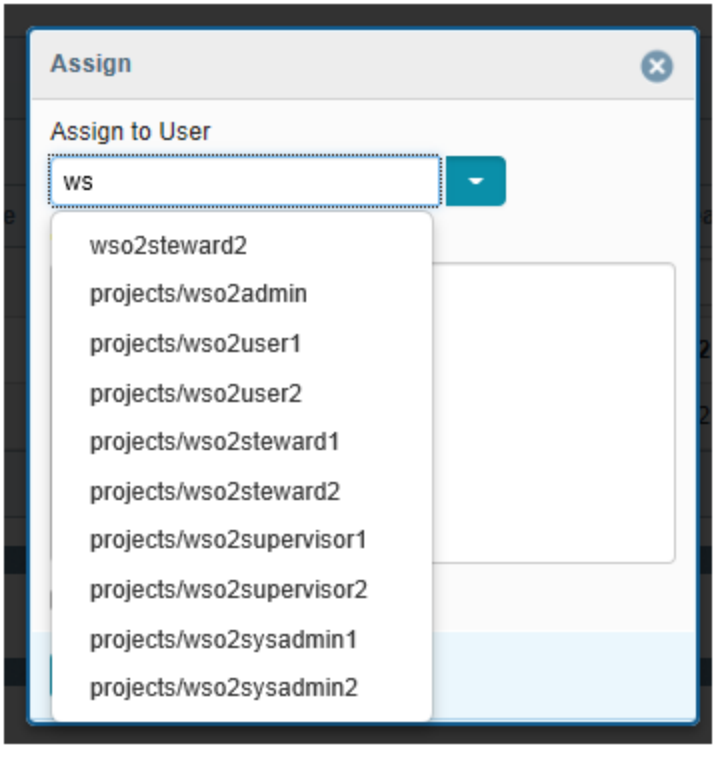
If there are any unsaved changes on the page and the *Reassign* link is clicked on, then the warning dialog appears, indicating that the case with unsaved changes could not be reassigned.



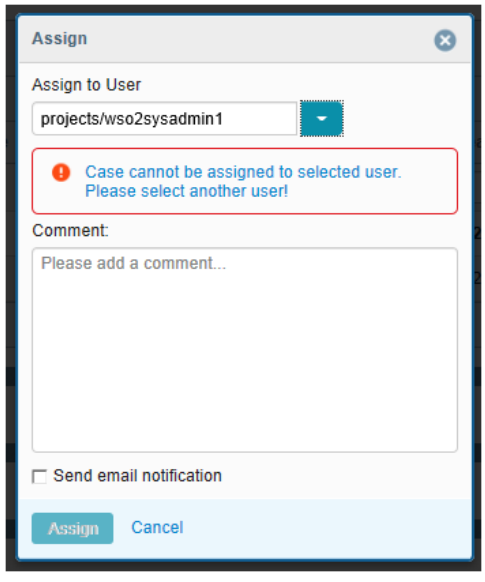
If there is no unsaved data and the link is clicked, the Reassign dialog appears. Functionality of it is similar to the Assign dialog on the Issues page.

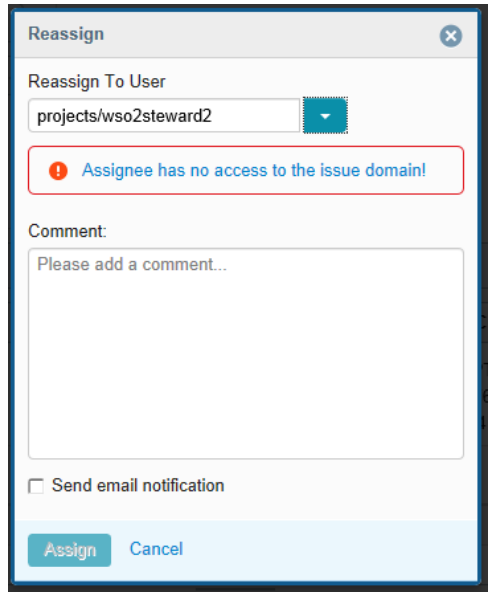


A list of users is available in the *Assign to User* drop-down list. When you start typing in the field, data is filtered dynamically to display only the relevant information.

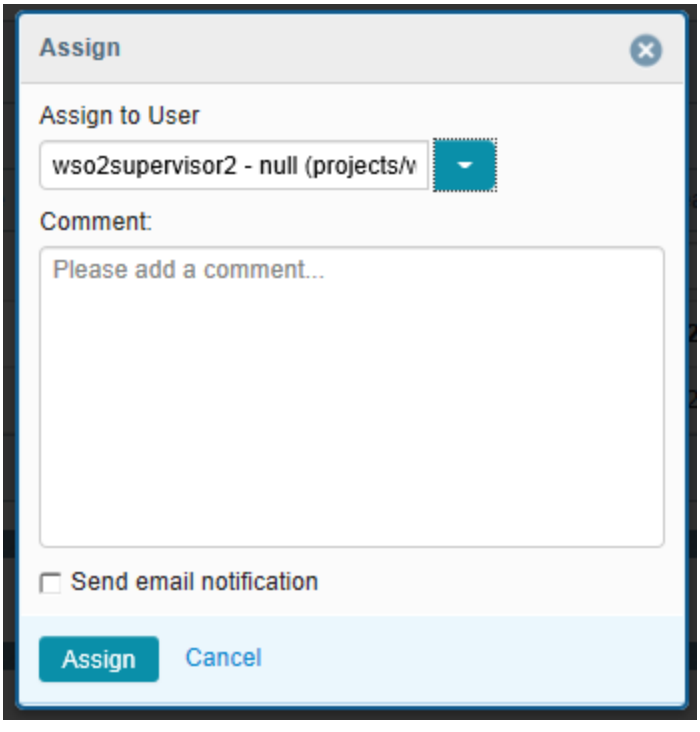


If a case cannot be assigned to the user selected from the list (for example, because the selected user has no permissions to resolve cases, and so on), or if the entered data finds no matches in the database, the appropriate validation message is displayed.


Assign
Assign to User
projects/wso2sysadmin1
Case cannot be assigned to selected user.
Please select another user!
Comment:
Please add a comment...
Send email notification
Assign
Cancel


Reassign
Reassign To User
projects/wso2steward2
Assignee has no access to the issue domain!
Comment:
Please add a comment...
Send email notification
Assign
Cancel

If the selected user is valid, the *Assign* button becomes available and case(s) can be reassigned.

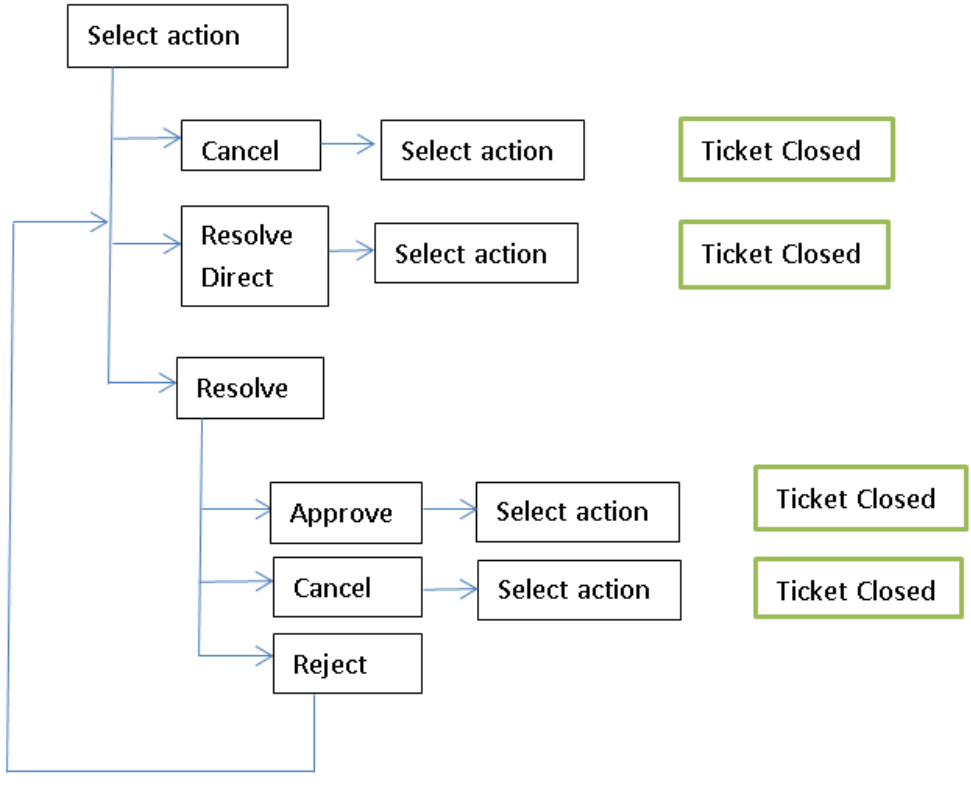


After the *Assign* button is clicked, you are redirected to the Issues page because the case is no longer your own.

Note: If you want an assignee to be notified about the reassign activity, the *Send email notification* check box should be selected.

Workflow Schema

The Workflow actions available for each edit are dependent on the User Role and the current status of the edit. The following image shows the Workflow schema.



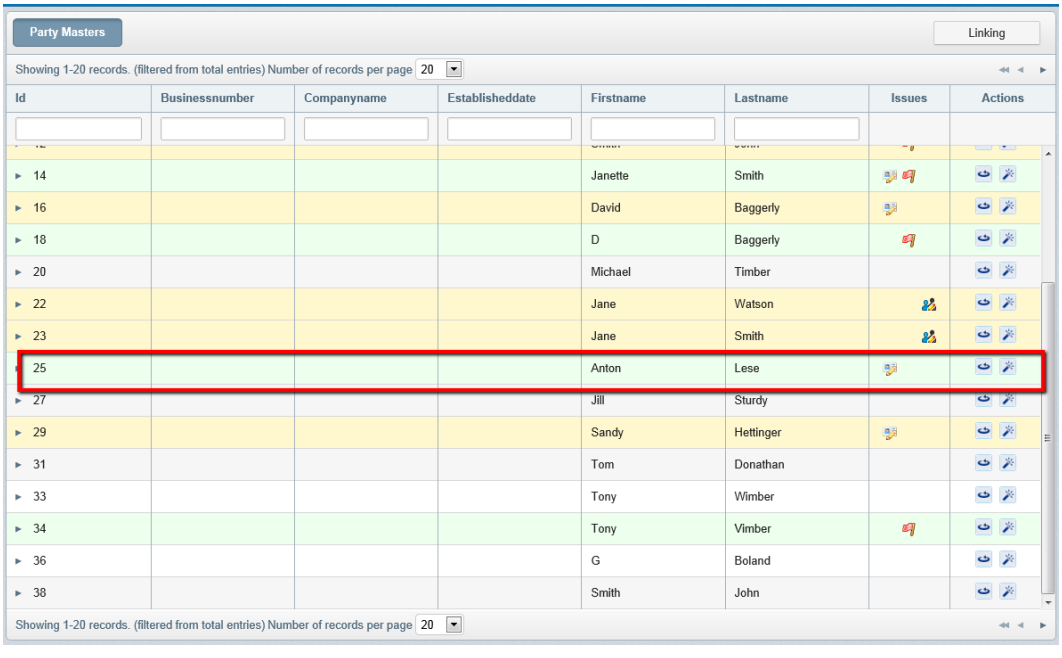
When ticket the is closed using the **Resolve Direct** or **Resolve -> Approve** workflow actions, the Edited value overrides the Original one in the appropriate Instance record.

If the ticket is closed using any other workflow action, then the override process will not start.

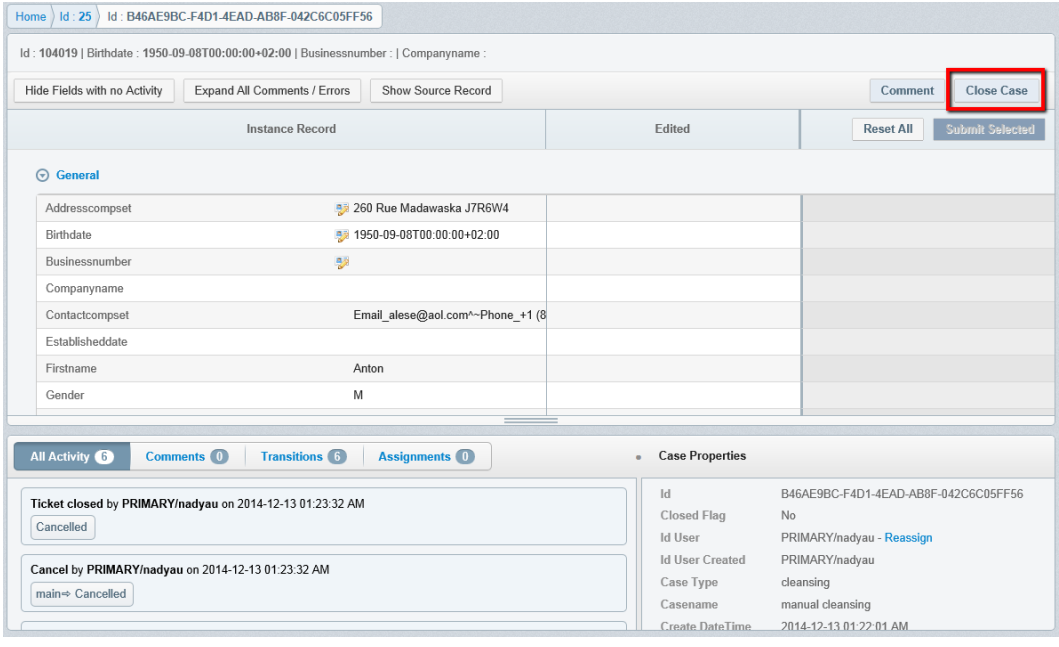
Workflow actions available per role are displayed below:

	Manual Cleansing
Data Steward	Resolve, Cancel
Data Supervisor	Approve, Reject, Resolve Direct, Cancel

When the case is closed, records that were under the cleansing remediation process are highlighted on the Home page in green color. The new cleansing remediation process can be started for them.

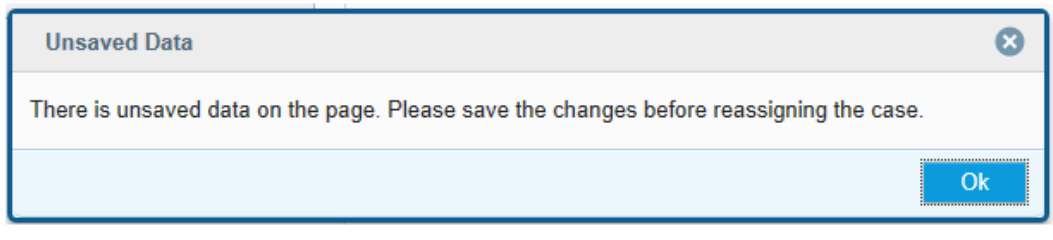


You can close the whole case using the *Close Case* button. It appears only after all tickets are closed, as shown in the following image.



Note: A case can be closed only by an assignee of the whole case.

If there are any unsaved changes on the page, and the *Close Case* button is clicked, then the warning dialog appears, indicating that the case with unsaved changes could not be closed, as shown in the following image.



After the case is closed, it is displayed in Display mode and cannot be edited or reassigned.

General Issue Page (For Golden and Instance Records)

A General issue is the case that consists of the comments on attributes of the Golden and Instance record.

Note: This is the only type of case that can be opened by someone with a User role. User roles have all other Remediation pages prohibited for editing and viewing, but can be configured using the appropriate Policy.

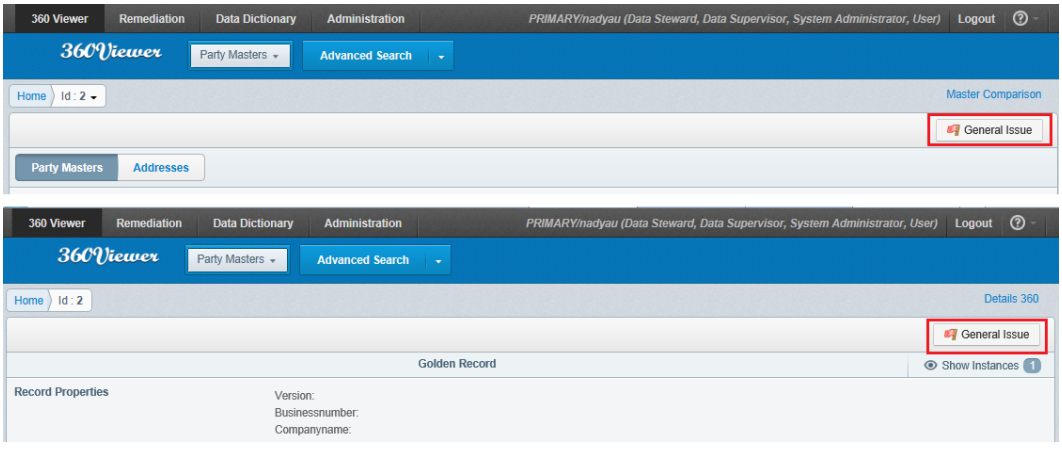
Navigation Options

There are four options you can use to navigate to the General issue page:

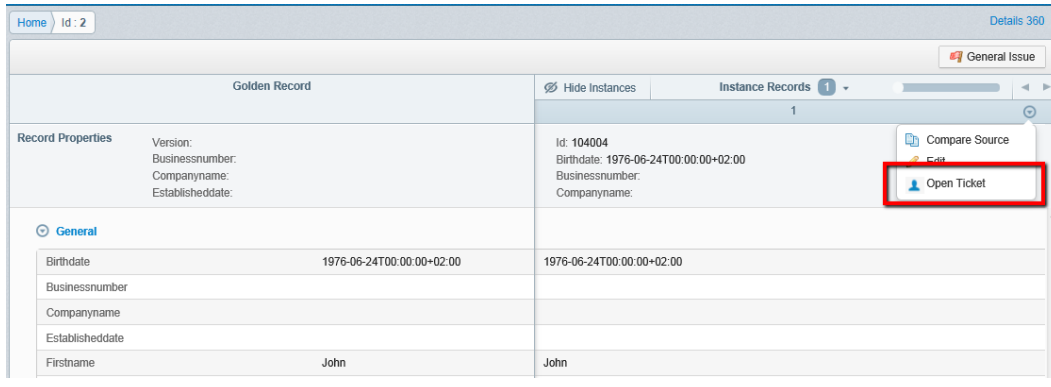
- From the Details 360 and Master Comparison page, create a new General Issue case by clicking the *General issue* button (for Golden records).
- From the Master Comparison page, create a new General Issue case using the *Open Ticket* menu item (for Instance records).
- Through a link from the Issues pop-up window, you can view an already created General Issue case (appropriate icons are displayed on Details 360, Master Comparison, and Home pages).
- From the Issues page, you can view already created General Issue cases.

Note: Any record currently under the General Issue remediation may not be remediated under any other General Issue case.

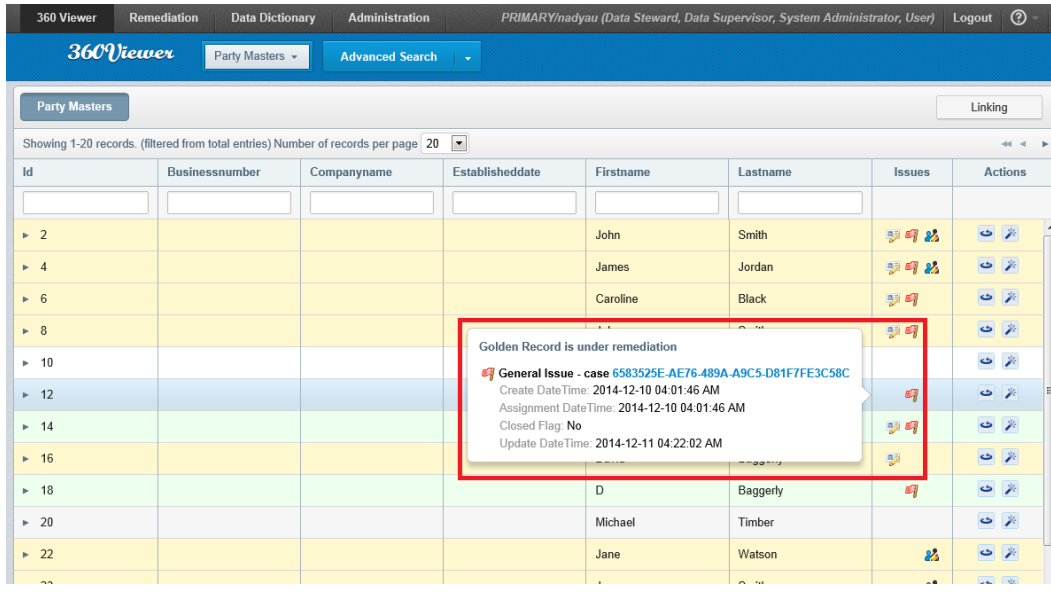
If you want to open a General issue case for *Golden record*, navigate to the Master Comparison or Details 360 page of that record and click the *General Issue* button.



If you want to open a General issue case for the *Instance record*, navigate to the Master Comparison page of that record, expand the Instance records section, and select the *Open Ticket* menu item for the appropriate Instance.



Another way to navigate to the General Issue page is through the links in the Issue pop-up window (if the General issue case already exists in the system).

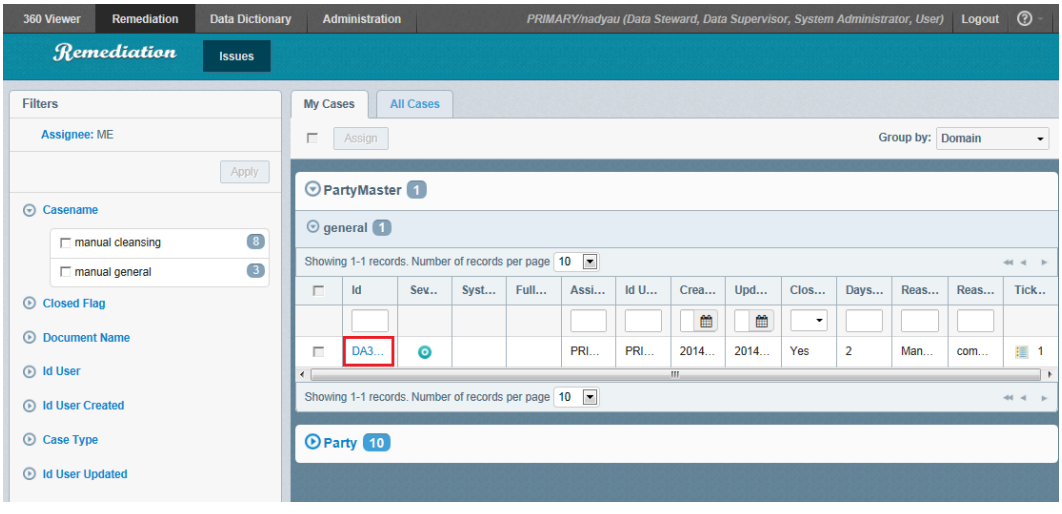


In order to see the pop-up window, move the pointer over any General Issue remediation icons that are displayed on Details 360, Master Comparison, or Home pages, and then click the appropriate link.

If a case is assigned to the current user, the General Issue page will be displayed in Update mode, so that the user can continue working with it. If it is not assigned to the current user, the General Issue page will be in Display mode, where the user can make no changes.

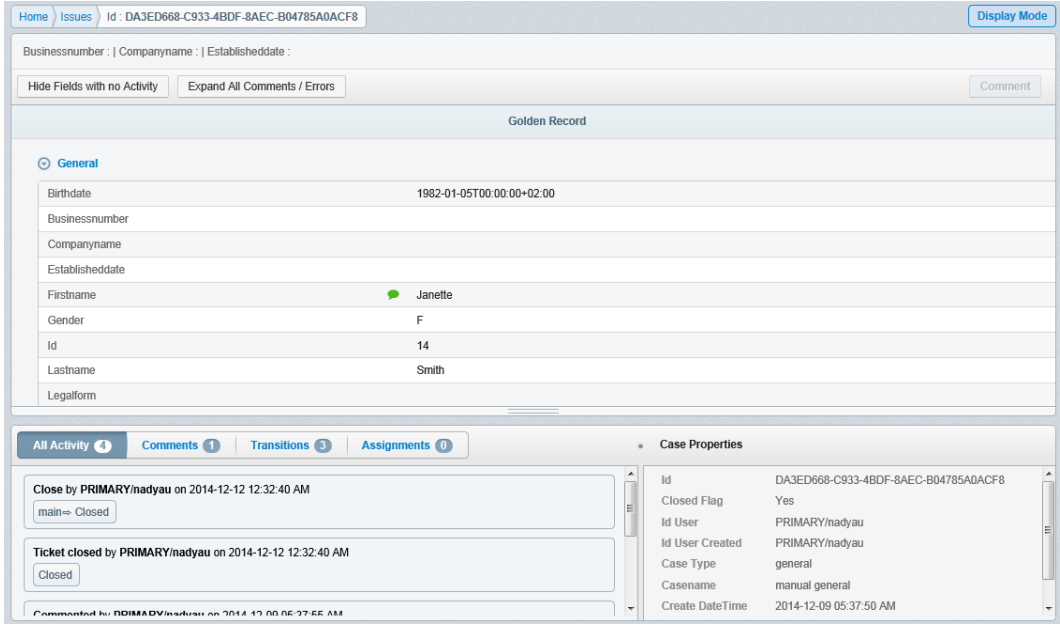
Note: If the General Issue case is created by someone with the User role, then the case stays Unassigned until the Data Supervisor or Data Steward assigns it to someone. Until then, the case can be edited by anyone.

The last way to navigate to an already created General Issue case is to select the appropriate link on the Issues page (not available for User roles).



The same process applies as with links in pop-up windows. If a case is assigned to the current user, the General Issue page will be displayed in Update mode, so that the user can continue working with it. If it is not assigned to the current user, the General Issue page will be in Display mode, where the user can make no changes.

Note: Closed General Issue cases are displayed on the Issues page and in Remediation pop-up windows. Those cases can be opened in Display mode only.

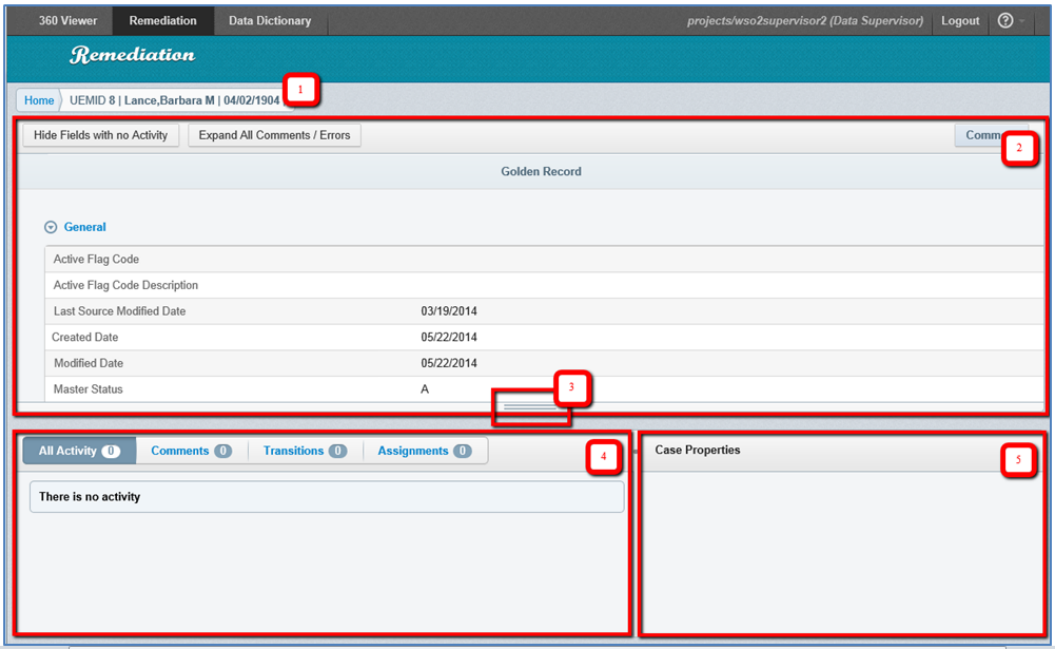


Page Structure

The General Issue Case page is composed of the following main blocks:

1. Bread crumbs
2. Workspace
3. Expand / Collapse Workspace control
4. Activity Stream

5. Case Properties

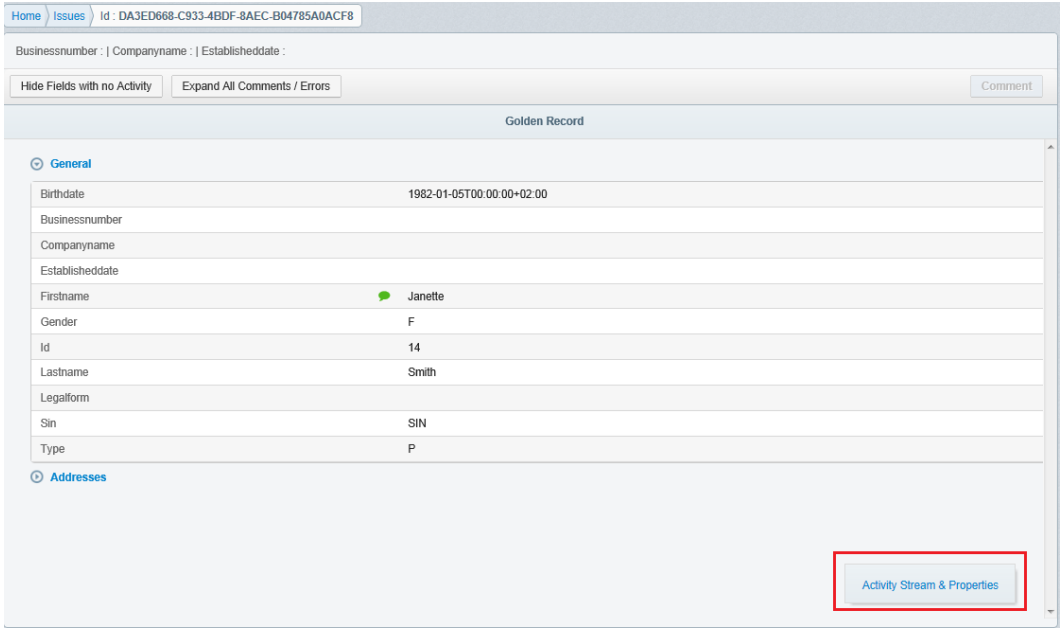


Using bread crumbs, you can navigate to the previously visited pages.

In the *Workspace*, you can add comments to attributes. By default, the workspace is collapsed and only the first main important attributes are displayed.

The fields of the Workspace panel can be configured using the Administration module. For more information, see *General Issue Page* on page 130.

The Expand/Collapse Workspace control shows and hides the Activity stream and Case properties, and expands/collapses the Workspace. When the workspace is expanded, the *Activity stream & Properties* link is displayed in the bottom-right corner of the page to open the Activity stream and Case properties sections.



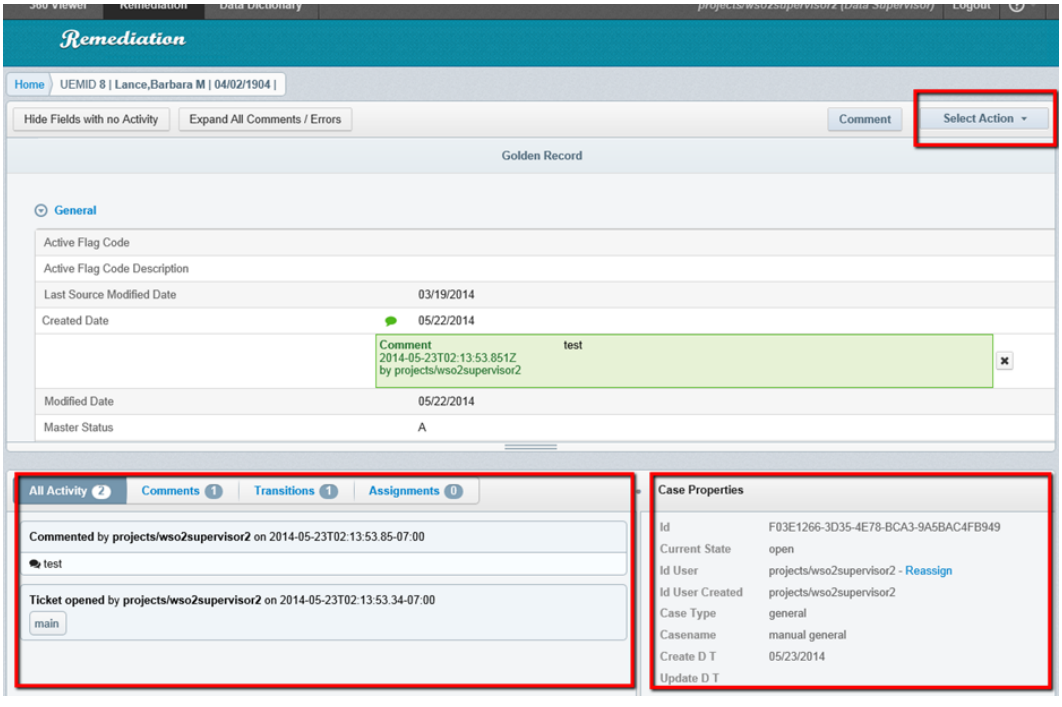
Below the Workspace, the *Activity stream* is displayed. All activities such as comments and transitions through the workflow for every attribute, general comment, and reassignment issues are tracked in the Activity stream.

Case properties include information on the case (for example, assignee, created date, and so on).

Creating a Case

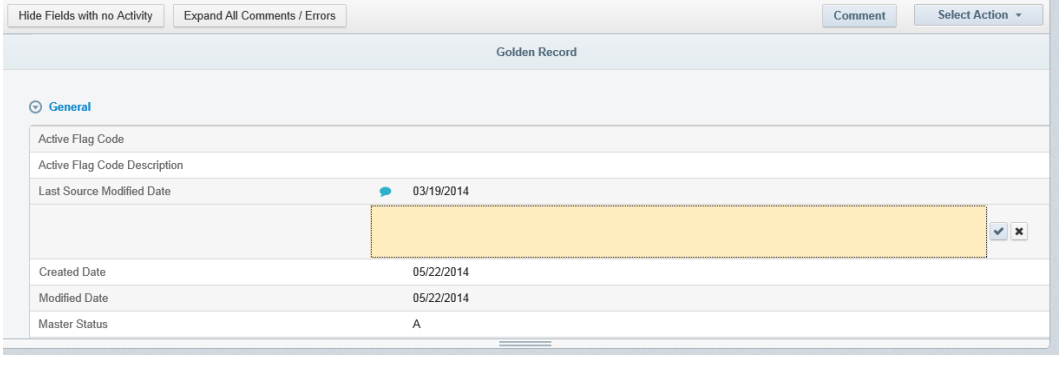
In order to create General Issue case, comments should be added to any field. After the case is created, the Activity Stream and Case Properties sections get refreshed, and displays the relevant information (the Case Properties section can be configured using the Administration portal). For more information, see *Case Properties Panel* on page 131.

The following image shows the Workflow actions drop-down list that appears (only for Data Steward and Data Supervisor roles).

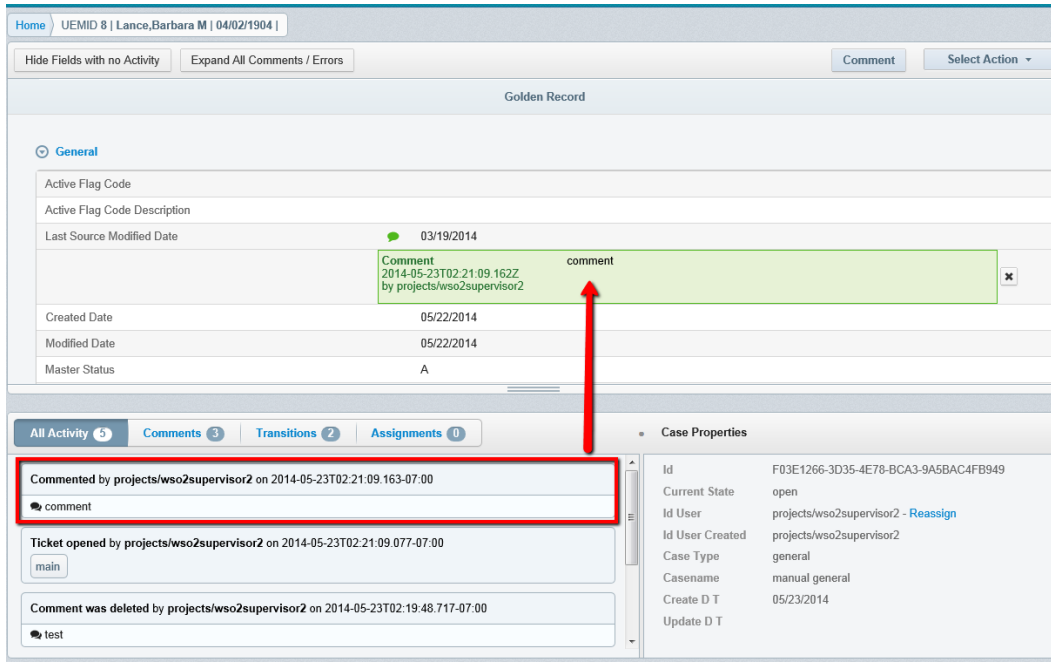


Note: A User role cannot send the case to the workflow, so the Workflow actions drop-down list is not displayed for this user.

You can comment on any data attribute. When you move the pointer over the Original Data value or label, the *Add comment* icon is displayed. When the you click on the icon, the *Add comment* overlay is displayed.



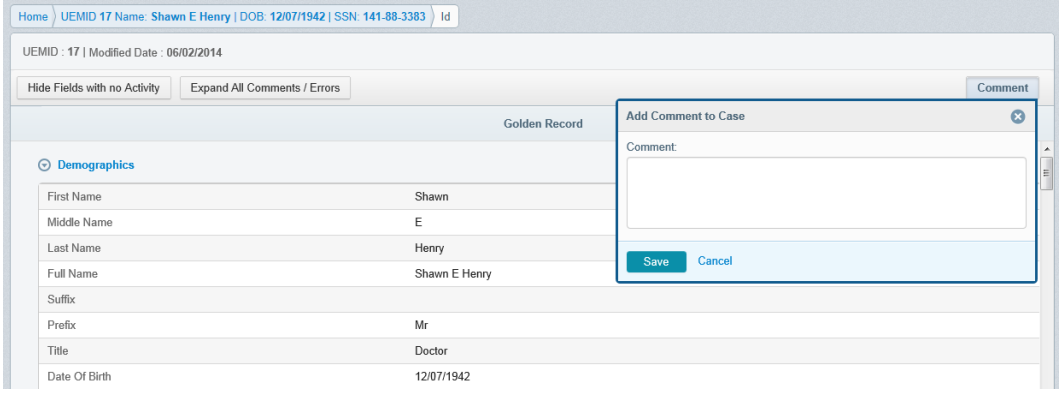
You can enter text and save a comment by clicking the *Save* icon. The comment will then be displayed in the Activity Stream and can be viewed when clicked on the *Add a comment* icon (the comment will be displayed in the expandable area below the row).



Note: When a comment is not saved yet, the *Add comment* icon is blue and the comment box is yellow. When the comment is saved, the icon and box both turn green.

Comments for attributes can be updated or deleted. In order to update an already saved comment, click anywhere in the Comment box and the comment text will be editable again. If you want to delete an in-line comment, click the Delete (*X*) icon.

You can optionally enter a global comment for the whole case by clicking the *Comment* button. It will appear in the Activity stream.

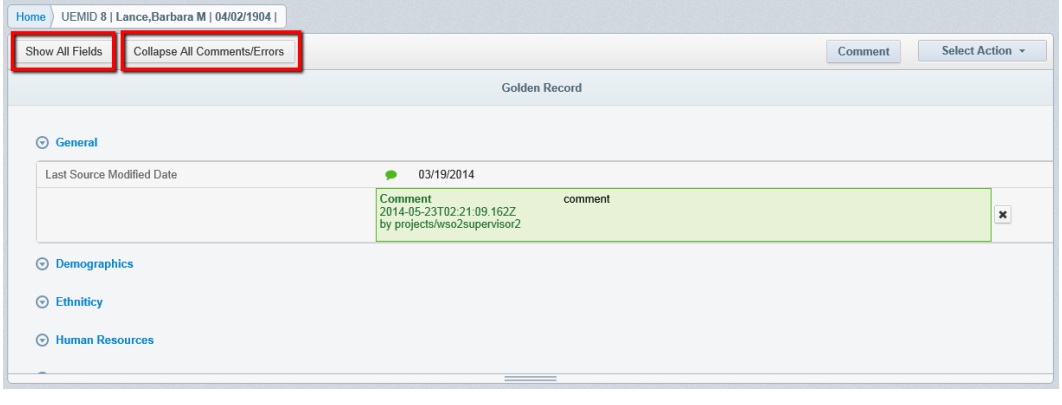


Viewing Comments

To view only attributes that need actions from a user, you can use the Hide *Fields with no Activity* switch. When the switch is activated, only those attributes are displayed that contain the following:

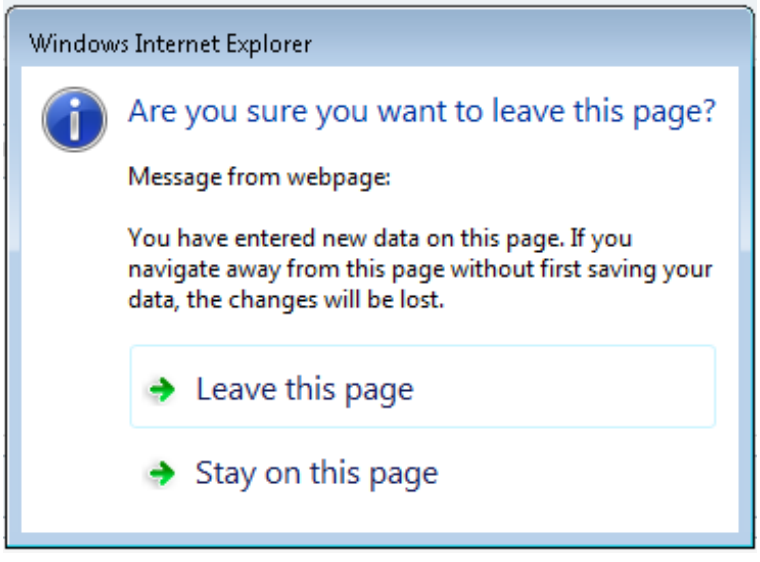
- Have manual edits.
- Have comments.
- Have issues (errors) from automated processes.

For convenience, the you can expand all the comments, errors, and notifications for all attributes using the *Expand All Comments/Errors* button.

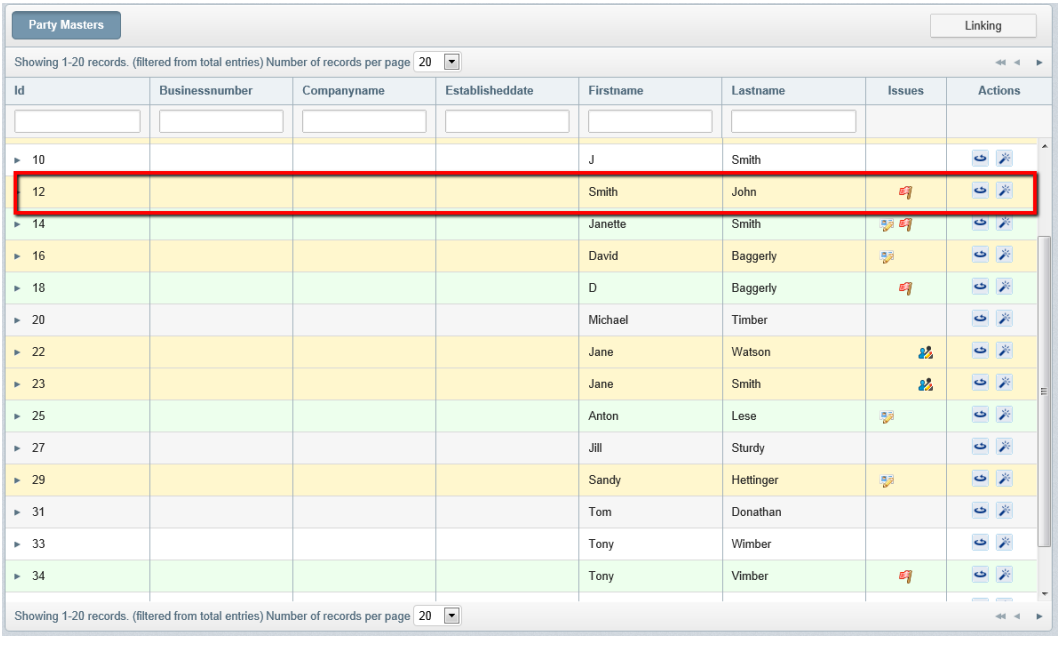


Once clicked, the buttons change their names, from *Hide Fields with No Activity* to *Show All fields*, and from *Expand All Comments/Errors* to *Collapse All Comments/Errors* so you can decide what exactly you wish to see.

When you have some unsaved changes made on the page, and try to navigate outside of it, a warning dialog box will appear, as shown in the following image.



A created General Issue case is displayed on the Home page accordingly, as shown in the following image.

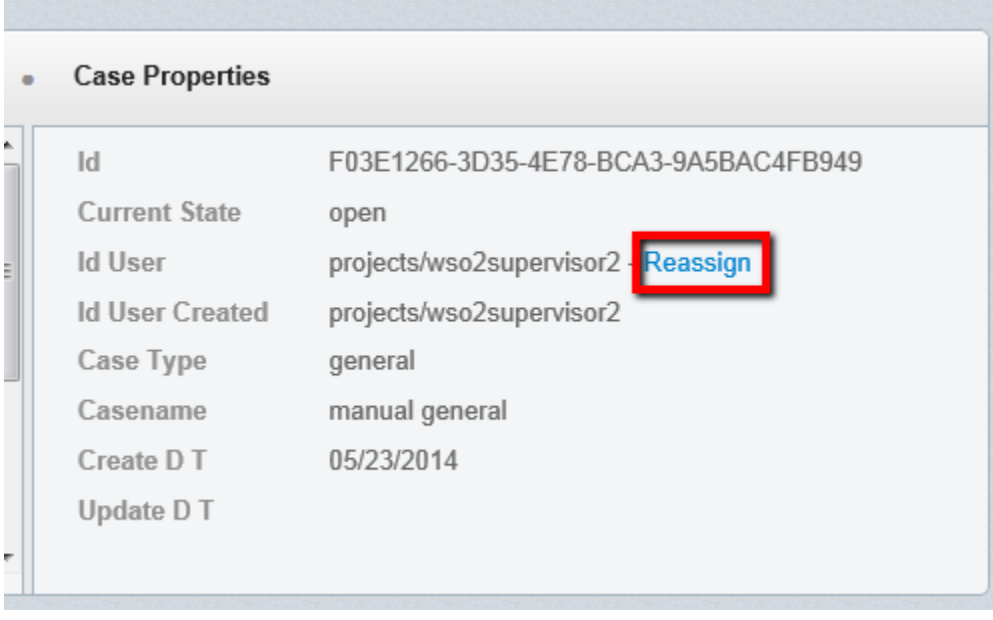


The row with an opened case is highlighted in amber, and the appropriate icon is displayed.

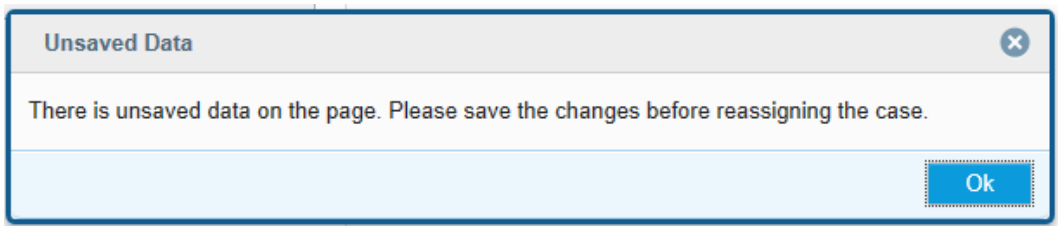
Reassigning a Case

If you want to reassign the case to someone else, click the *Reassign* link in the Case Properties panel.

Note: The *Reassign* link is not available for closed cases.

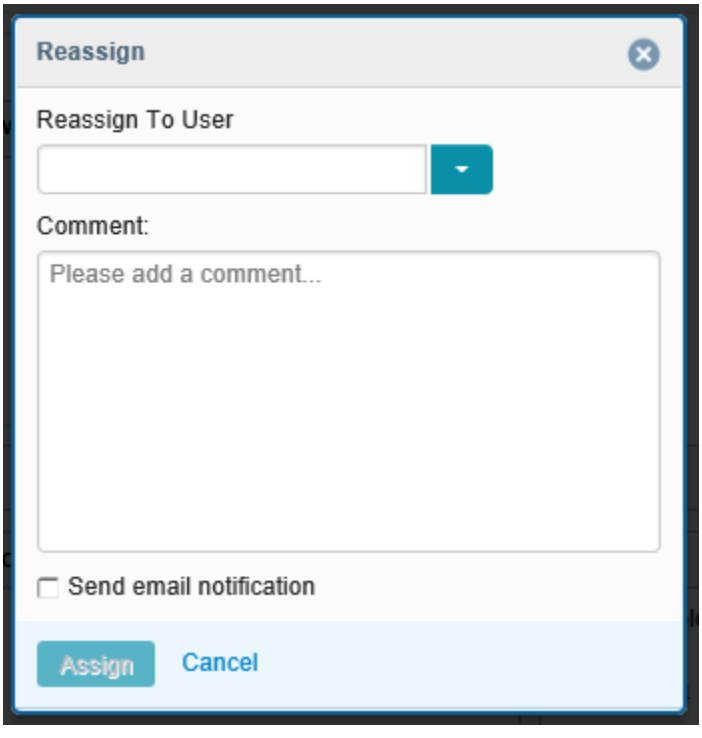


If there are any unsaved changes on the page, and the *Reassign* link is clicked on, then a warning dialog box appears, indicating that a case with unsaved changes could not be reassigned, as shown in the following image.

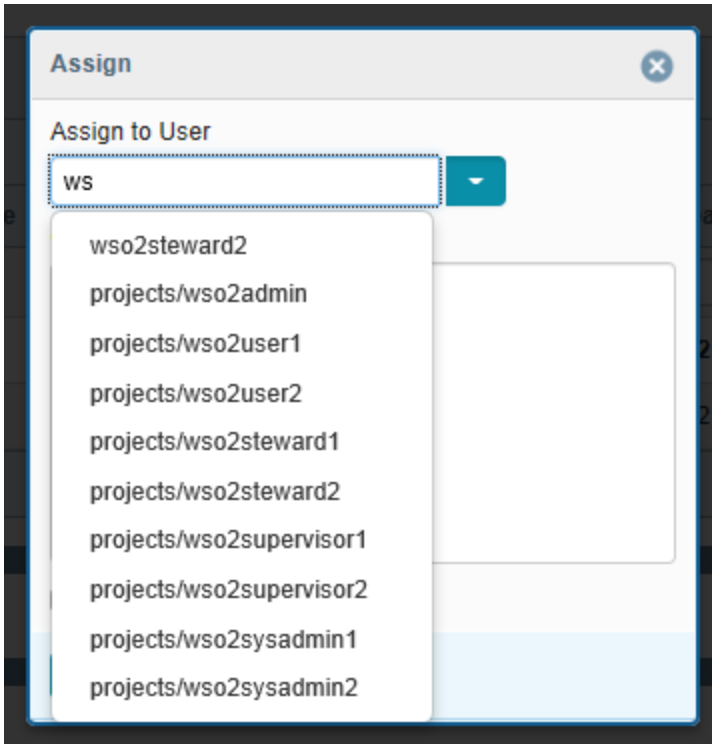


When there is no unsaved data and the link is clicked, the Reassign dialog box appears. The functionality of it is similar to the Assign dialog on the Issues page.

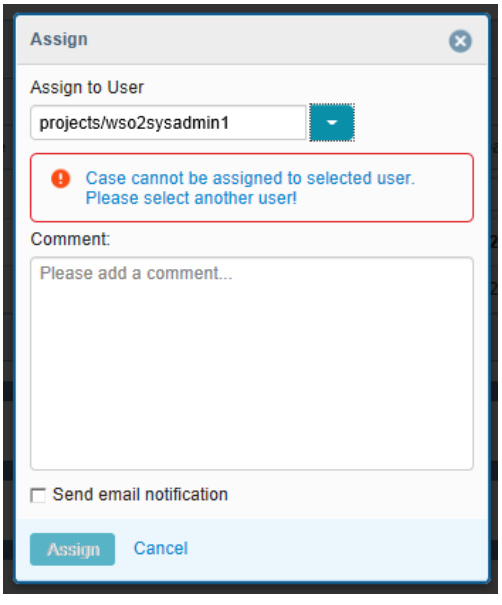
Note: For User roles, the Reassign link is not displayed, preventing you to reassign the case.

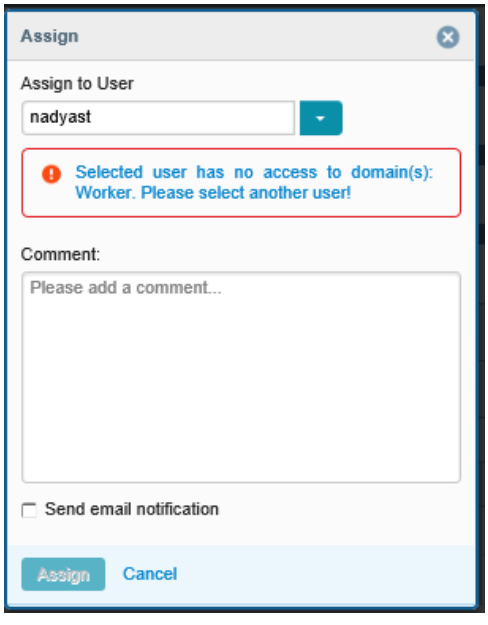


A list of users is available in the Assign to User drop-down list. When you start typing in the field, data becomes filtered dynamically to display only the relevant information.

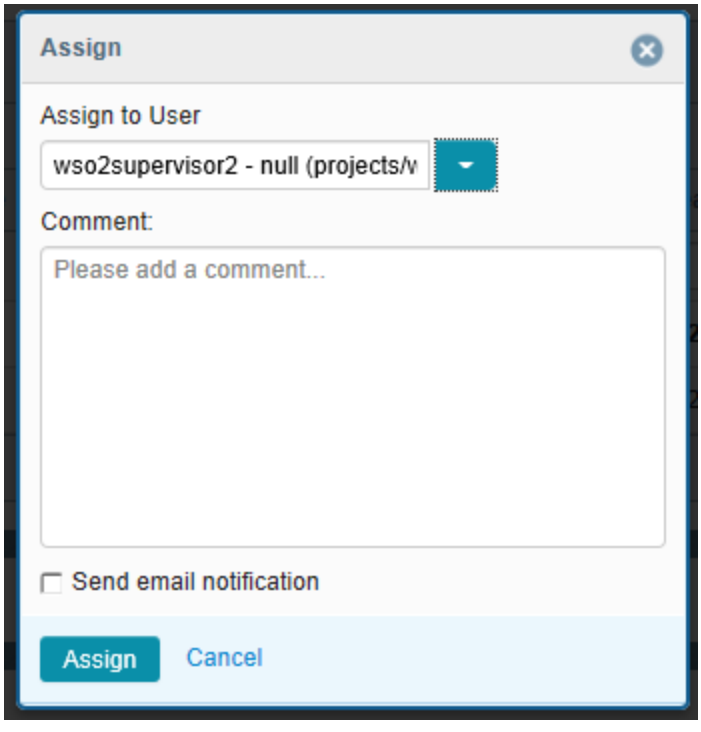


If the case cannot be assigned to the user selected from the list (for example, because the selected user has no permissions to resolve cases, and so on), or the entered data finds no matches in the database, the appropriate validation message is displayed, as shown in the following images.





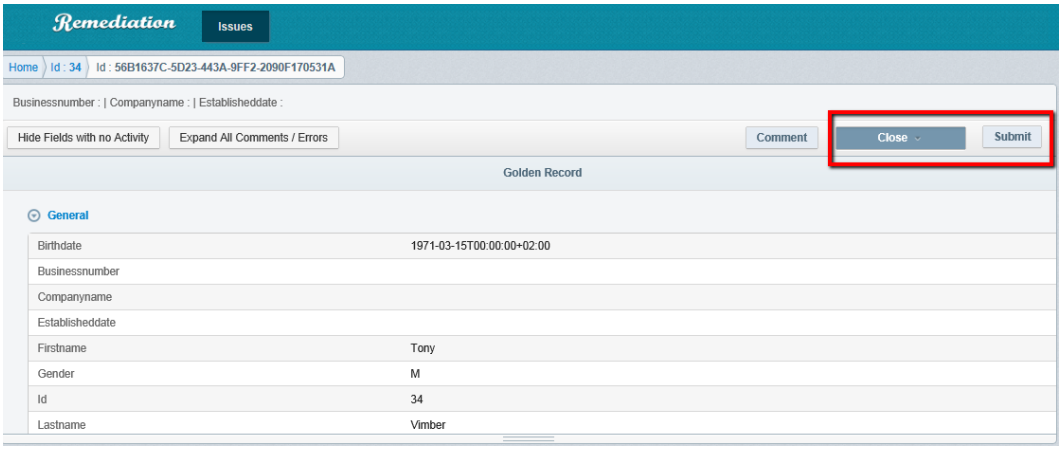
If the selected user is valid, the *Assign* button becomes available and case(s) can be reassigned.



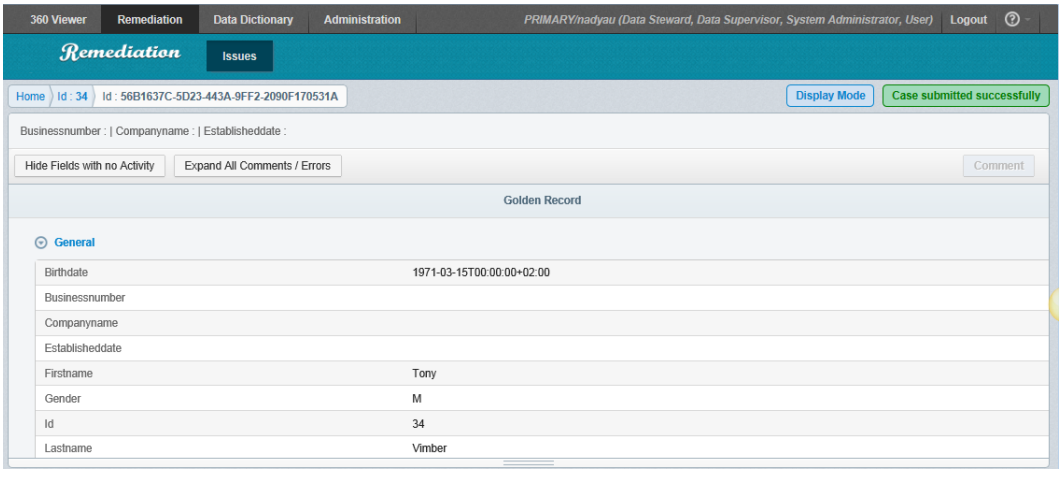
After the *Assign* button is clicked, you are redirected to the Issues page because case is no longer your own.

Note: If you want an assignee to be notified about the reassign activity, the *Send email notification* check box should be selected.

In order to submit a case to the workflow (only with Data Steward or Data Supervisor roles), select the appropriate workflow action from the drop-down list and click *Submit* (the *Submit* button appears after a workflow action is selected).

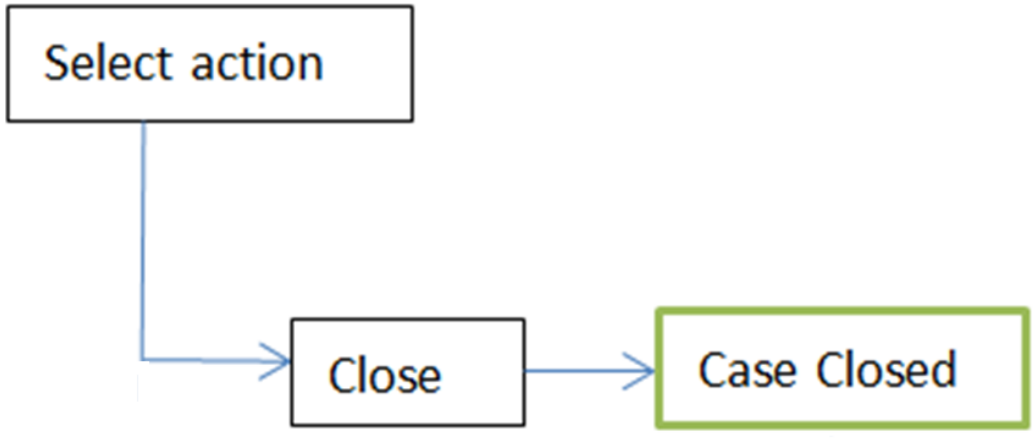


When a case is submitted, the appropriate notification will appear in the upper right corner of the screen, as shown in the following image.



Workflow Schema

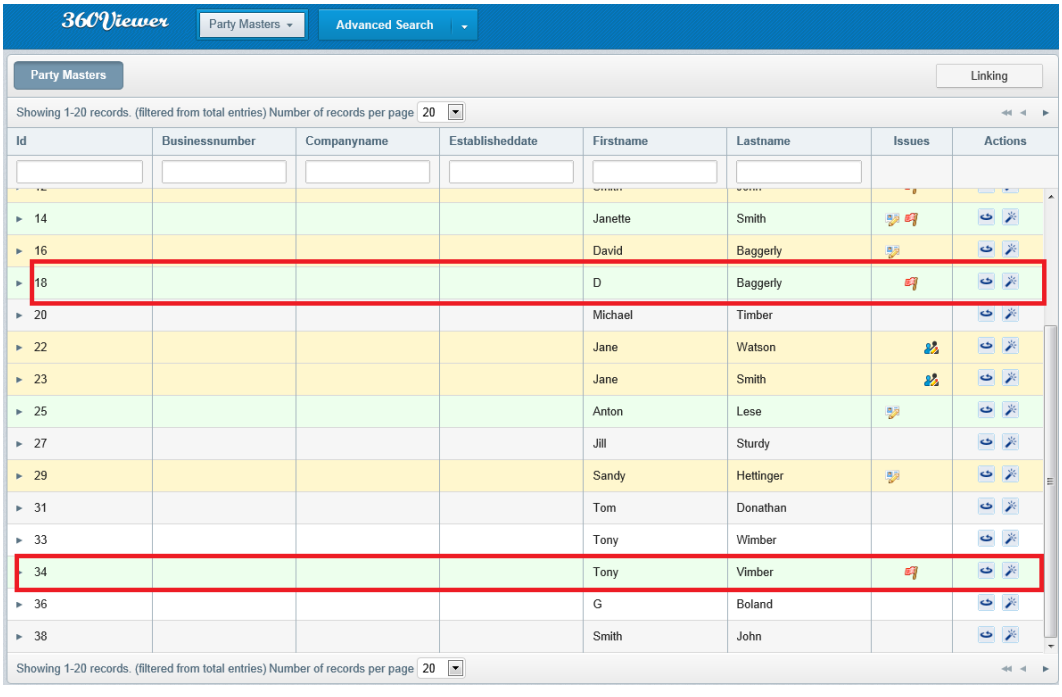
The Workflow actions available for each edit are dependent on the User Role and the current status of the edit. The Workflow schema is shown in the following image.



Workflow actions available per role are displayed below:

	General Issue
User	-
Data Steward	Close
Data Supervisor	Close

When the case is closed, records that were under the General Issue remediation process are highlighted on the Home page in green color. The New General Issue remediation process can be started for them.



Chapter 4

Configuring the Remediation Portal

This chapter describes how to configure the Omni Governance Console (OGC) Remediation Portal.

In this chapter:

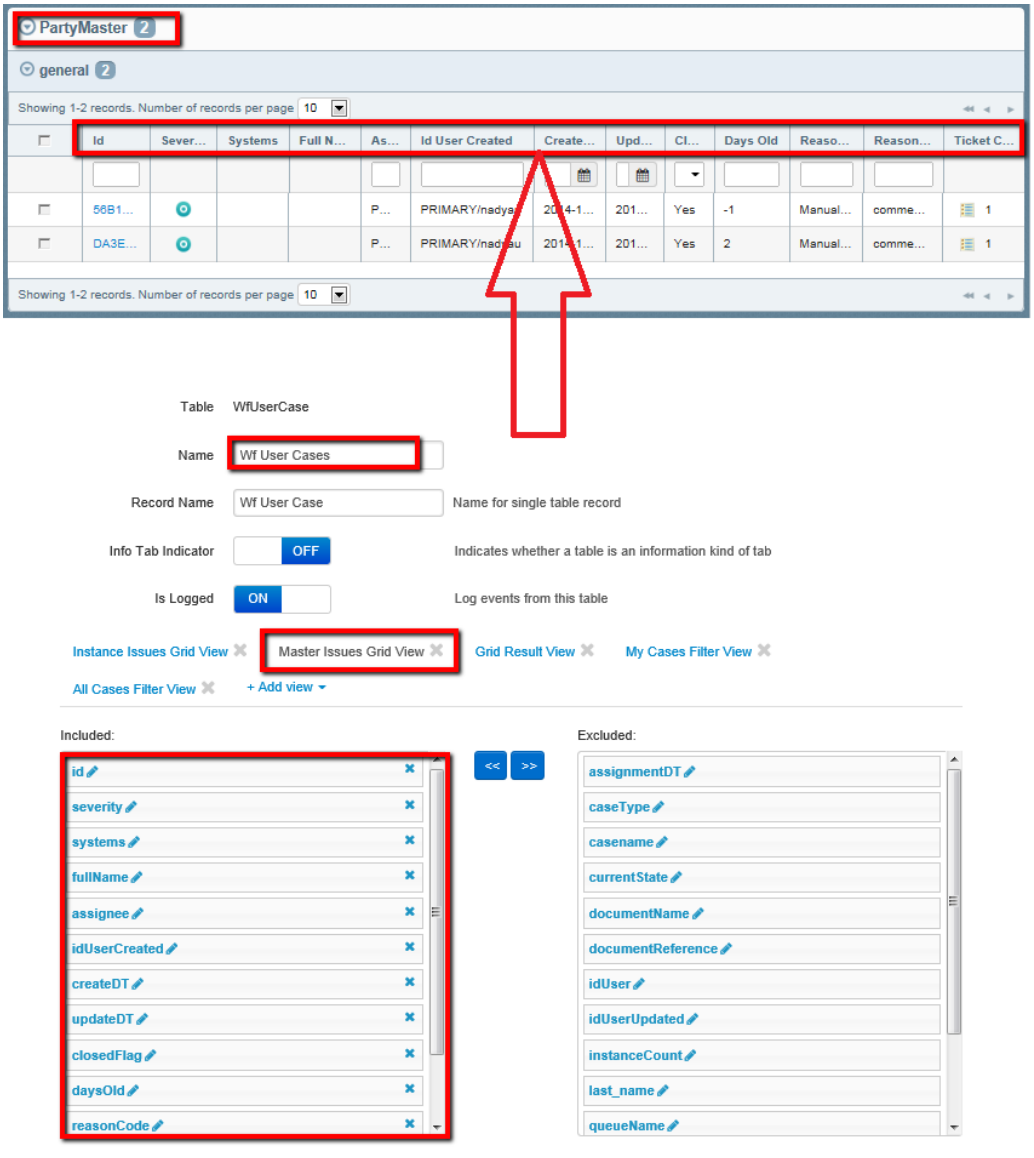
Issues Page

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

Master Issues Grid

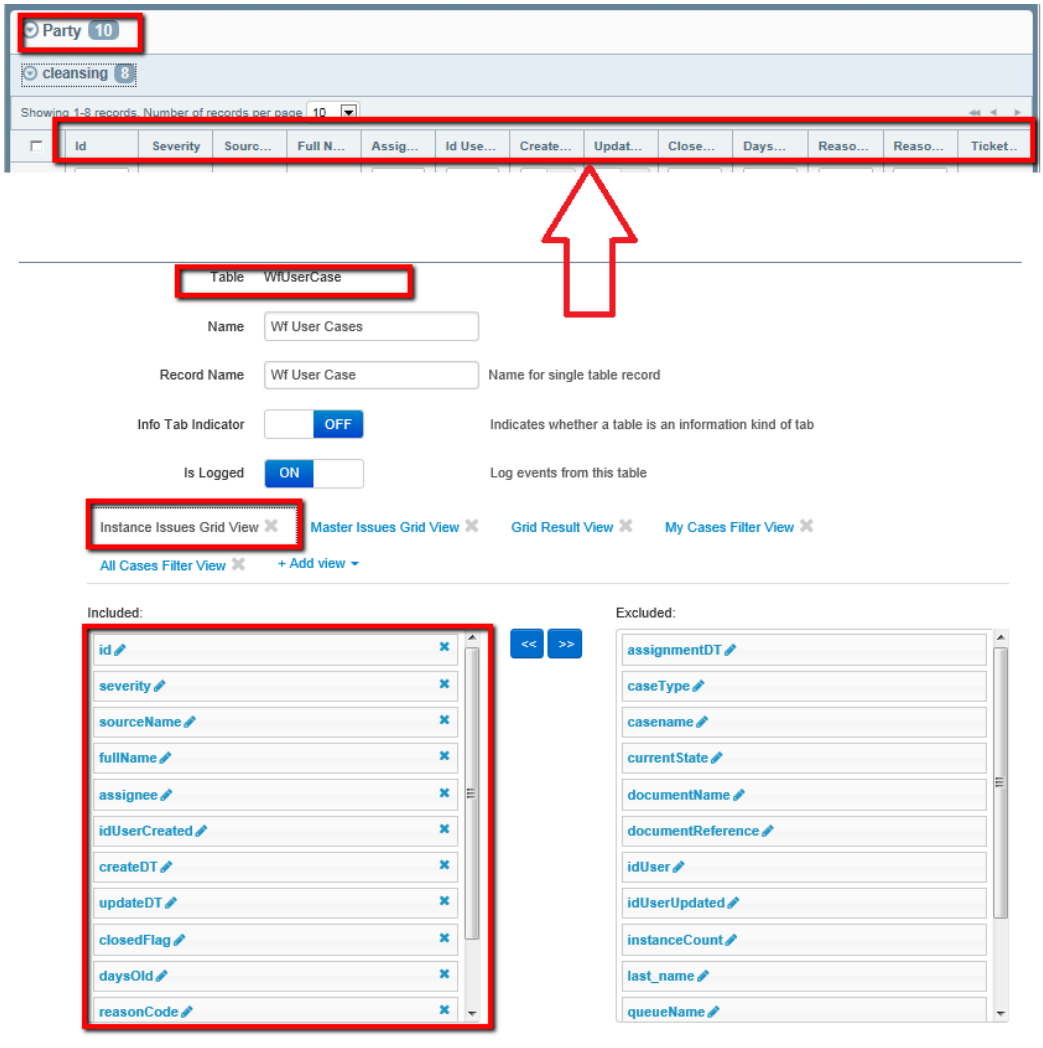
In order to configure the appearance of the grids on the Issues page, the Administrator should navigate to the Tables tab and select the *WF User Cases* table from the list of tables.

The WF User Cases table consists of three views. The **Master Issues Grid view** is responsible for the appearance of the grid with cases created on the Master (Golden) records (for example, Override matching or General Issue for Golden records), as shown in the following image.



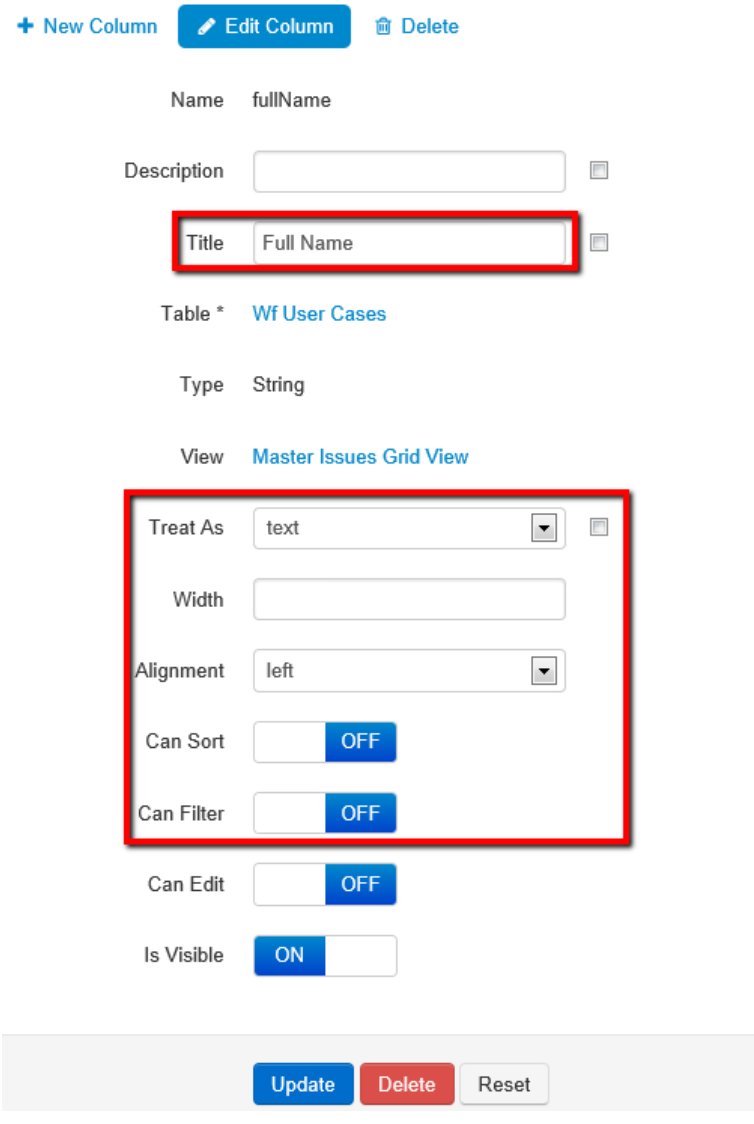
Instance Issues Grid

The **Instance Issues Grid view** is responsible for looks of the grid with cases created the on Instance records (for example, Manual Cleansing or General Issue for Instance record), 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 in order to include columns in the view, or click the Delete (*X*) icon if you want to exclude a column from the view.

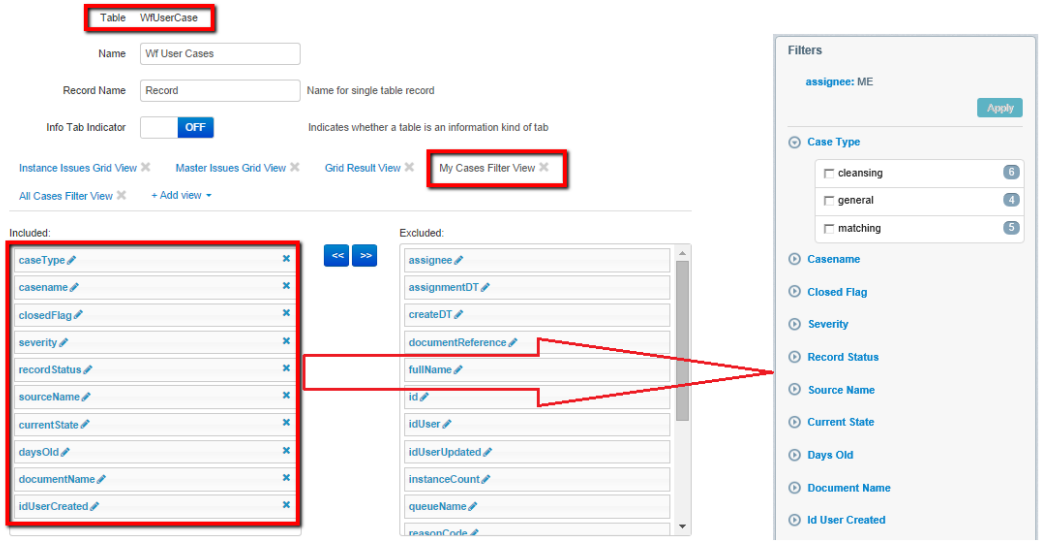
The configuration of nested columns (for example, display name, sortable, filterable, and so on), is available by clicking the *Edit Column* button for appropriate columns and updating corresponding options, as shown in the following image.



Filtering Panel on My Cases Tab

In order to configure Filtering Panel on the Issues Page, the Administrator should navigate to the Tables tab and select the *WF User Cases* table from the list of tables.

The **My Cases Filter view** is responsible for the list of filtering criteria displayed in Filtering panel on the My Cases tab.

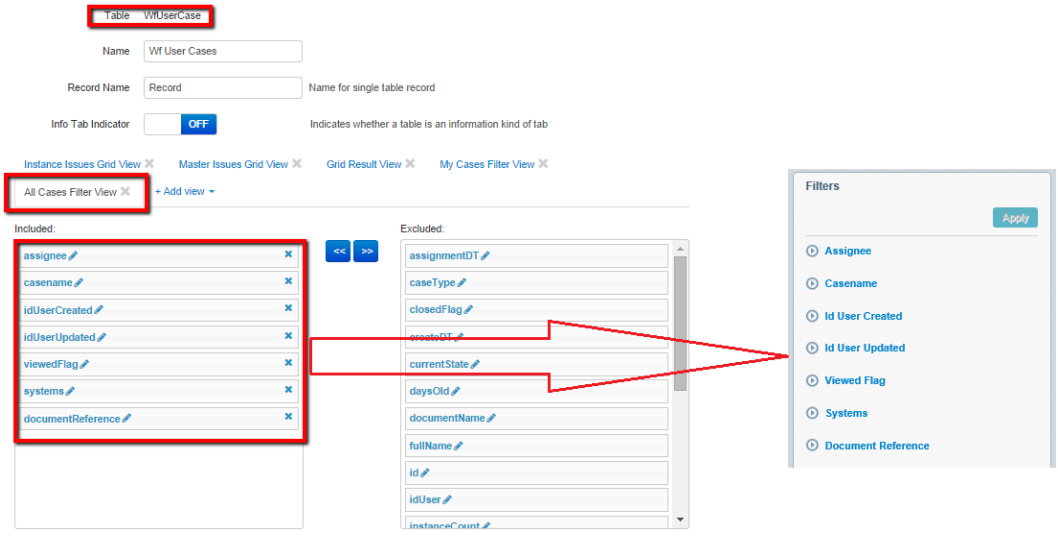


To rearrange the columns in the view, drag the required column from the Excluded section to the Included section in order to include a column in the view or click the Delete (*X*) icon if you want to exclude a column from the view.

Filtering Panel on All Cases Tab

In order to configure the Filtering Panel on the Issues page, the Administrator should navigate to the Tables tab and select the *WF User Cases* table from the list of tables.

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

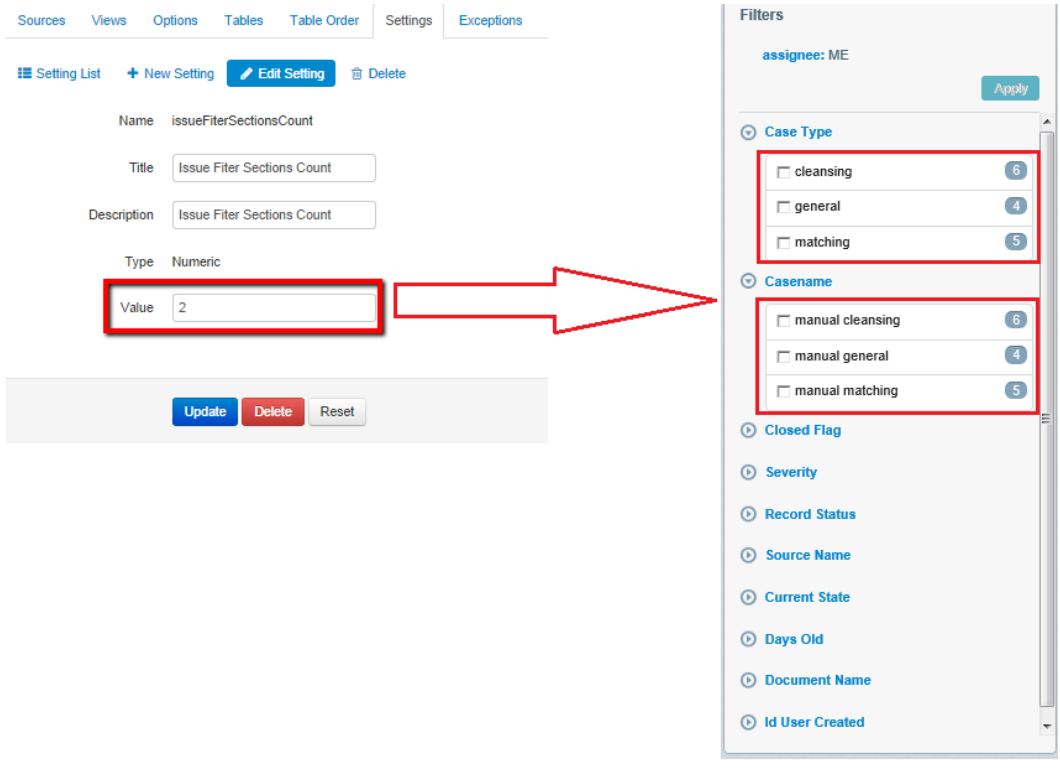


To rearrange the columns in the view, drag the required column from the Excluded section to the Included section in order to include a column in the view or click the Delete (*X*) icon if you want to exclude a column from the view.

Number of Filtering Criteria Sections Expanded by Default

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

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



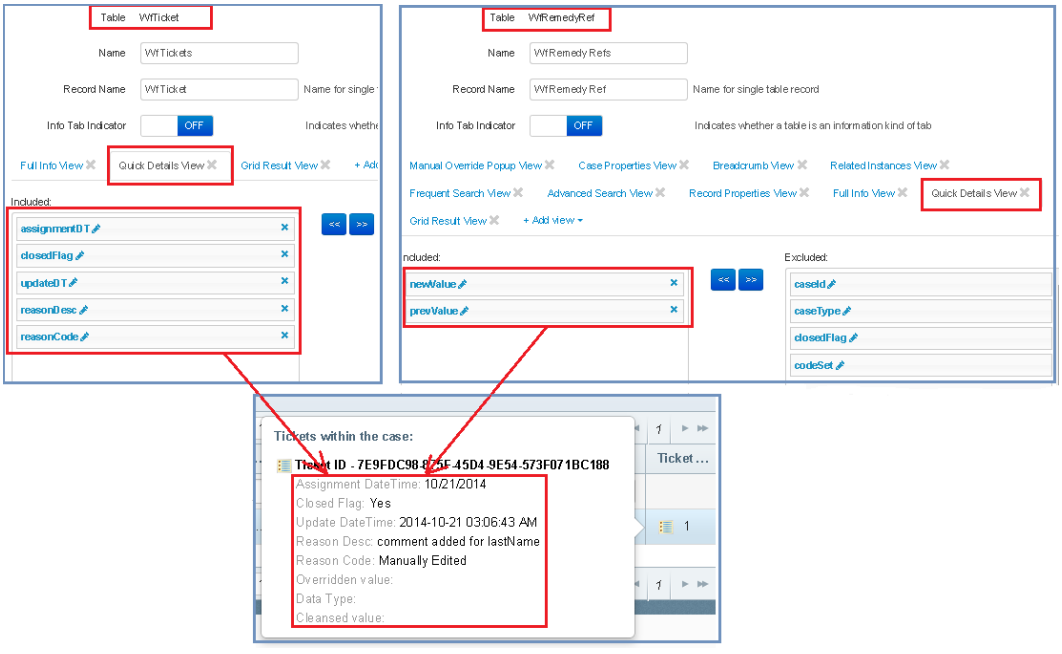
This setting is applied to Filtering panels on both the My Cases and All Cases tabs.

Ticket Within the Case Pop Up

Fields for 'Tickets within the case' pop up are composed out of two views in two different tables:

- WFTicket table, Quick Details view
- WFRemedyRef table, Quick Details view

To rearrange the columns in the view, drag the required column from Excluded to the Included section in order to include a column in the view or click the Delete (X) icon if you want to exclude a column from the view.



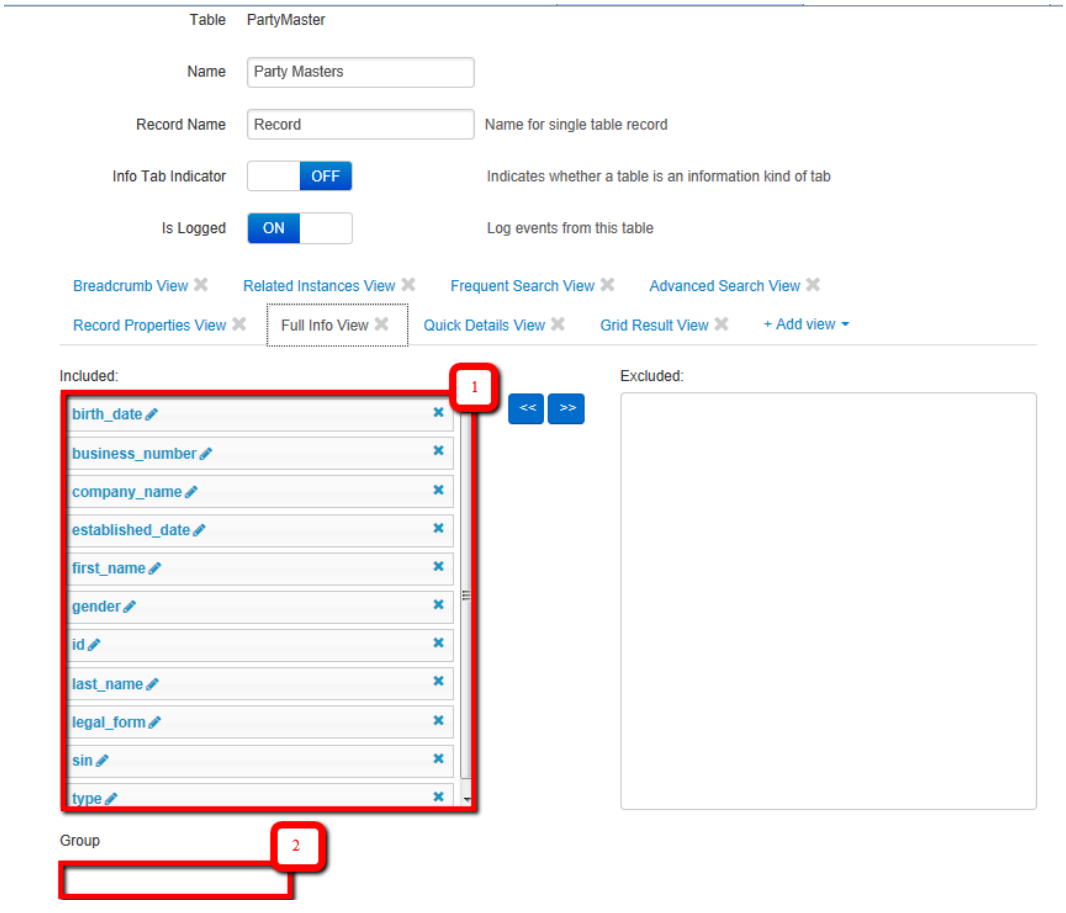
Override Matching Page

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

Instance Details Panel

In order to configure the Instance Details panel, the administrator should navigate to Tables tab and select an Instance table (for example, Provider, Worker).

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



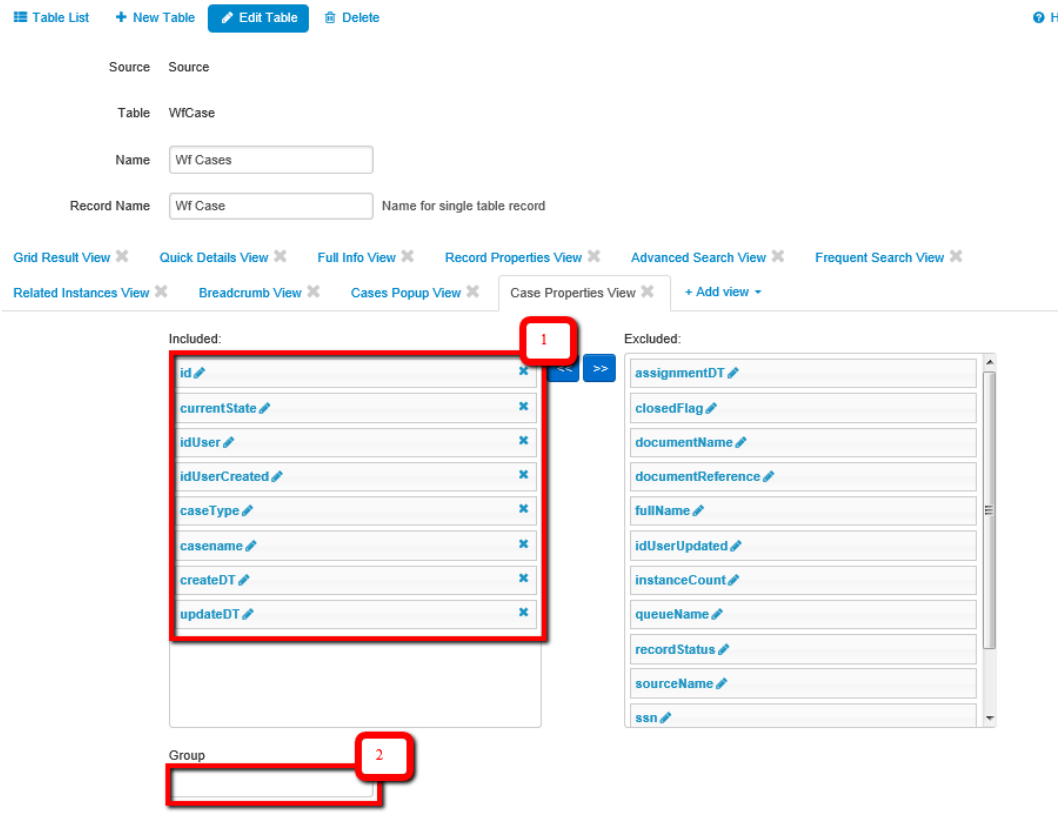
To rearrange the columns in the view, drag the required column from the Excluded section to the Included section in order to include a column in the view, or click the Delete (*X*) icon if you want to exclude a column from the view (1).

If you want columns to be separated in Groups, the Administrator has to add the appropriate group to the Included section (2).

Case Properties Panel

Another thing that can be configured on the Override Matching page is the *Case Properties panel*. The Administrator should select the *WF Cases* table from the list of tables. The view that needs to be configured is called **Case Properties View**.

Note: Configuration of this view affects all Remediation case pages (Override Matching, Manual Cleansing, and General Issue).



To rearrange the columns in the view, drag the required column from the Excluded section to the Included section in order to include a column in the view, or click the Delete (*X*) icon if you want to exclude a column from the view (1).

If you want columns to be separated in Groups, the Administrator has to add the appropriate group to the Included section (2).

Note: For this view, names of groups will not be displayed. Instead of names, a horizontal line will appear.

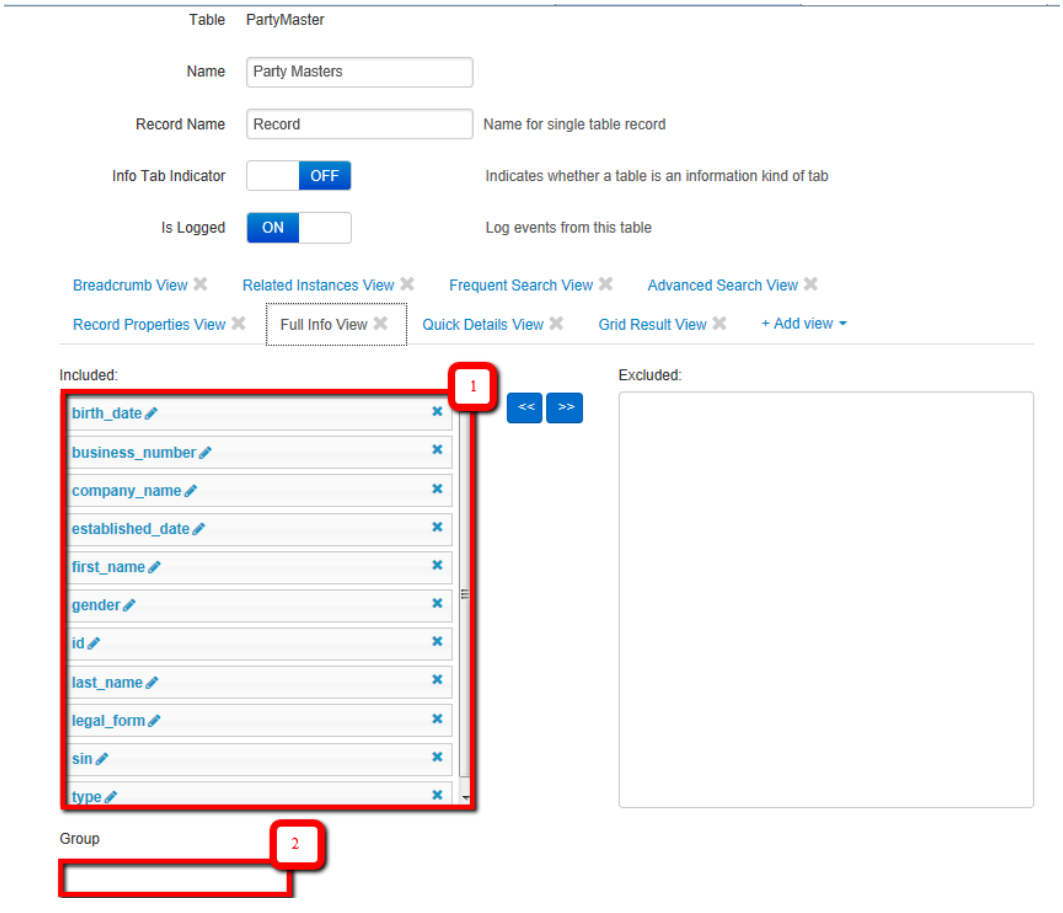
Manual Cleansing Page

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

Workspace Panel

In order to configure the *Workspace panel*, the administrator should navigate to the Tables tab and select an Instance table (for example, Provider, Worker).

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

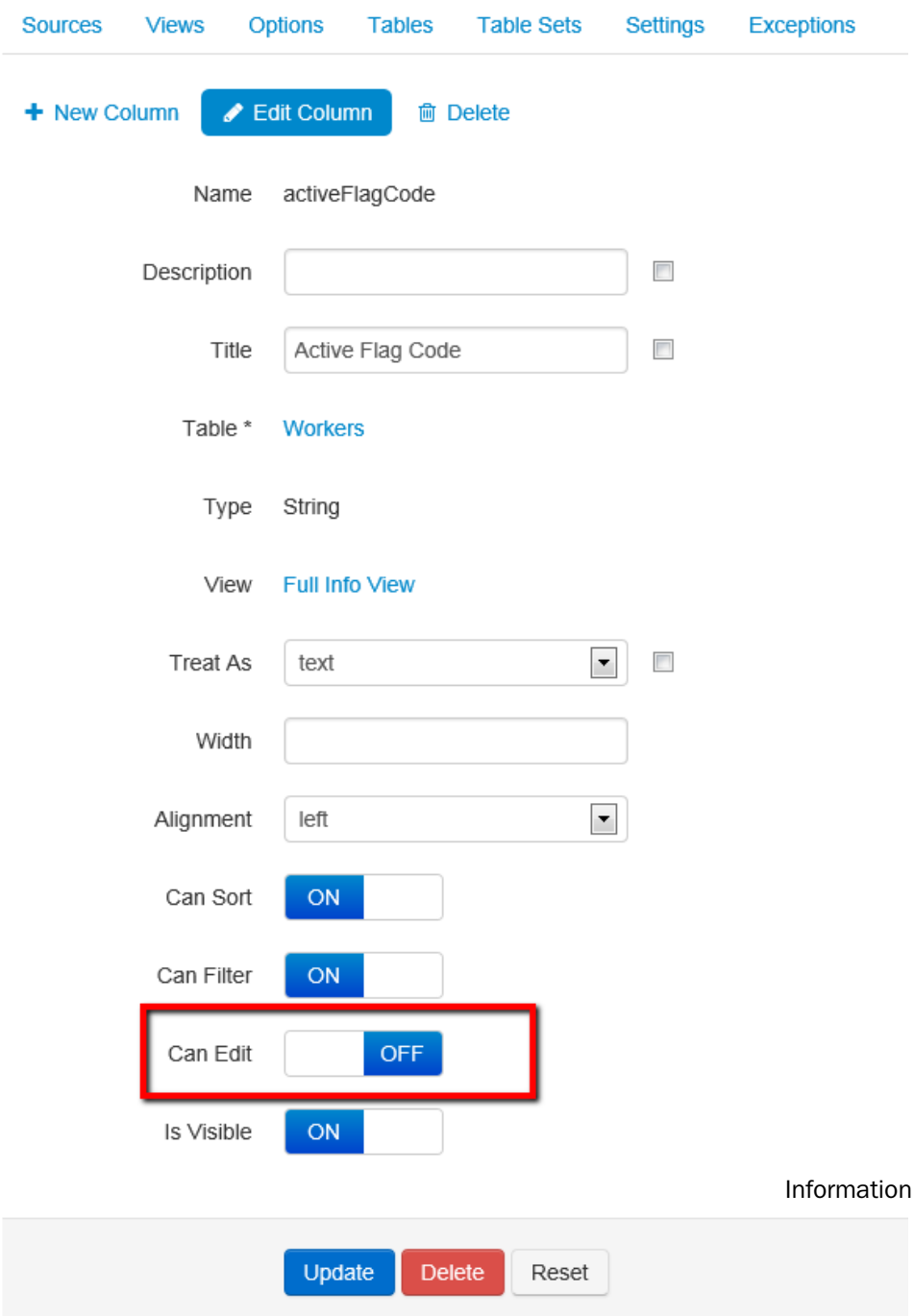


To rearrange the columns in the view, drag the required column from the Excluded section to the Included section in order to include a column in the view, or click the Delete (*X*) icon if you want to exclude some column from the view (1).

If you want columns to be separated in Groups, the Administrator has to add the appropriate group to the Included section (2).

Ability to Allow/Prohibit Editing for Fields

To configure the ability to edit the fields in the workspace panel, the administrator should edit the nested columns (for example, display name, sortable, filterable, and so on). This can be done by clicking the *Edit Column* button for the appropriate columns in the Full Info View of the appropriate table and updating corresponding option, as shown in the following image.

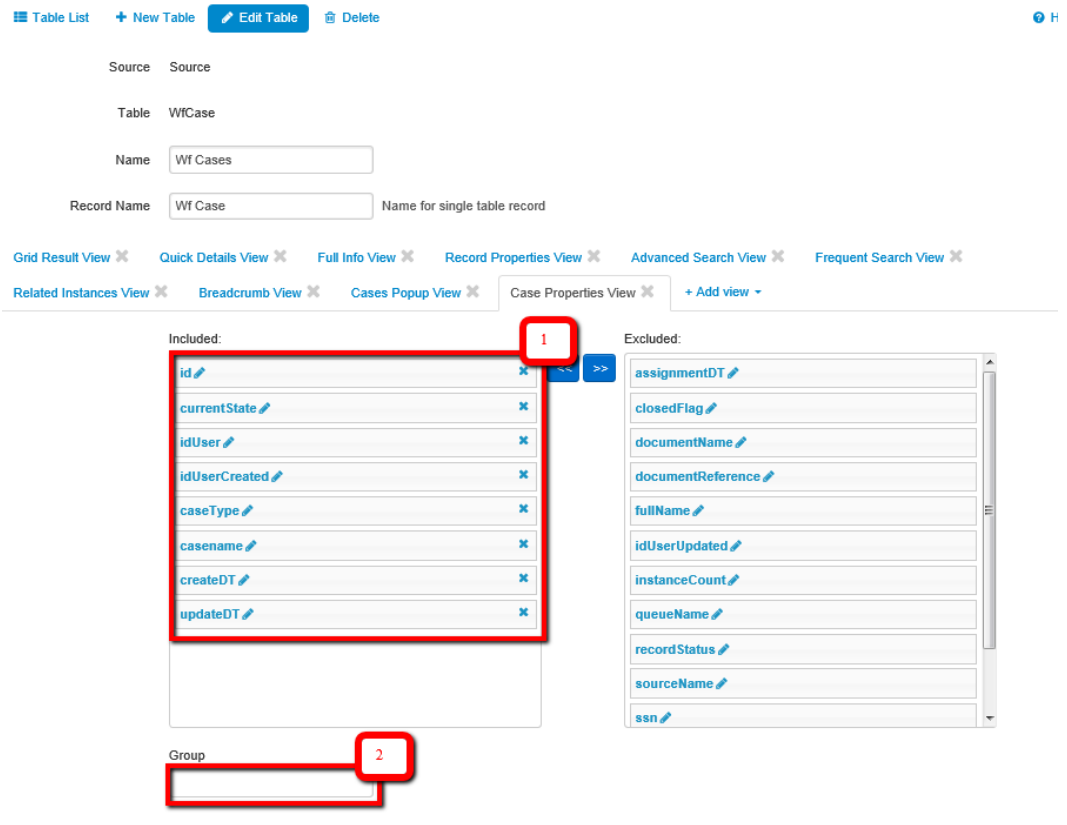


If some field needs to be disabled for editing, the administrator should select the *Off* option. If the field can be edited, the *On* option should be selected.

Case Properties Panel

In the Manual Cleansing page, the Case Properties panel can be configured. The Administrator should select the *WF Cases* table in the list of tables. Then, the Case Properties view needs to be configured.

Note: Configuration of this view affects all Remediation case pages (Override Matching, Manual Cleansing, and General Issue).



To rearrange the columns in the view, drag the required column from the Excluded section to the Included section in order to include the column in the view, or click the Delete (*X*) icon if you want to exclude a column from the view (1).

If you want columns to be separated in Groupies Administrator has to add the appropriate group to the Included section (2).

Note: For this view, names of groups will not be displayed. Instead of names, a horizontal line will appear.

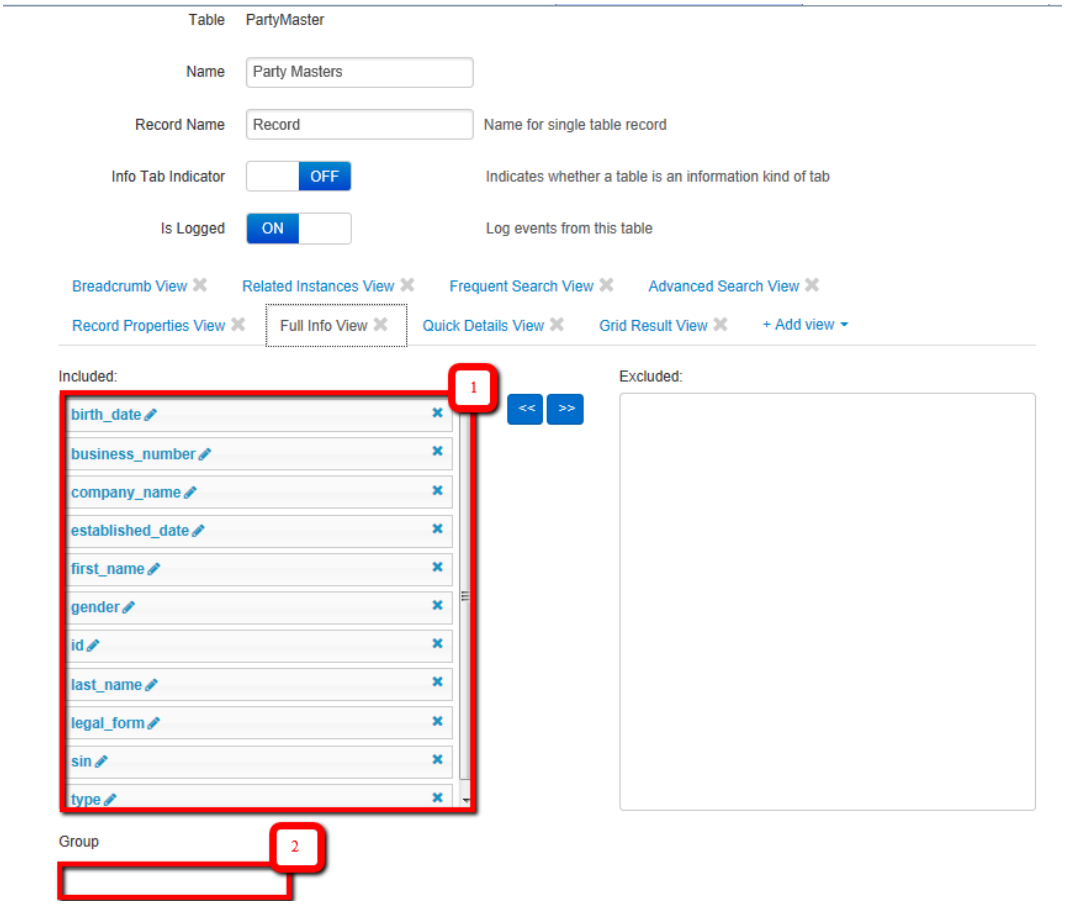
General Issue Page

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

Workshops panel

In order to configure the Workspace panel for General Issue of the Instance record, the administrator should navigate to the Tables tab and select *Instance table* (for example, Provider, Worker).

The Provider, Worker table consists of many views. Select *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 in order to include a column in the view, or click the Delete (*X*) icon if you want to exclude a column from the view (1).

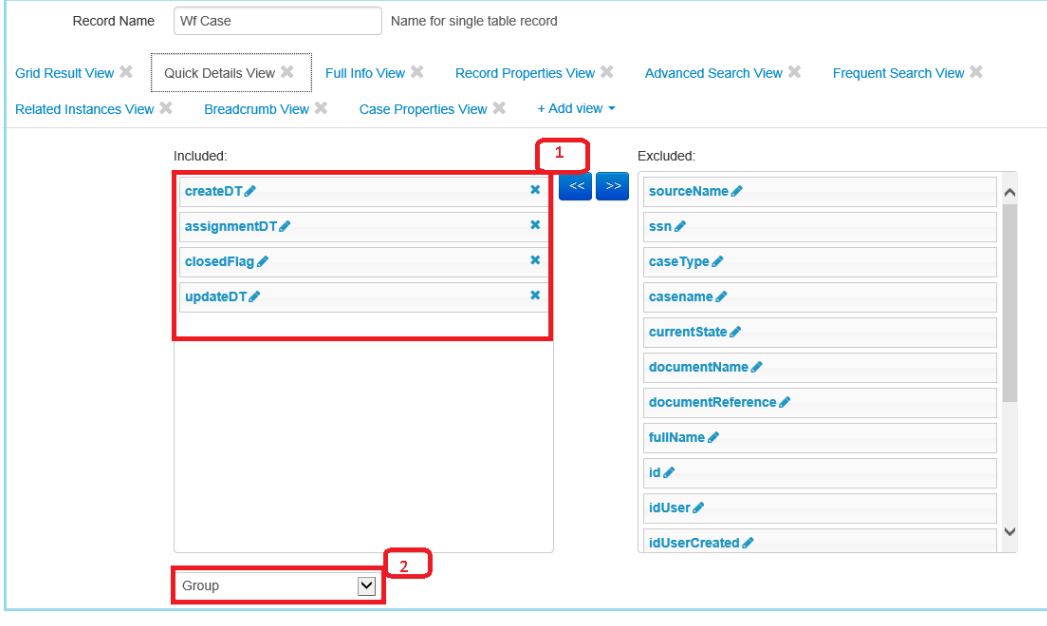
If you want columns to be separated in Groups, the Administrator has to add the appropriate group to the Included section (2).

Note: When the Workspace panel of General Issue page for Golden record needs to be configured, the steps are the same as described above, but the edited table should be a Master type (for example, Provider Masters, Facility Masters).

Case Properties Panel

In General Issue page, the *Case Properties panel* can also be configured. The Administrator should select the *WF Cases* table in the list of tables. The Case Properties View would then need to be configured.

Note: Configuration of this view affects all Remediation case pages (Override Matching, Manual Cleansing, and General Issue).



To rearrange the columns in the view, drag the required column from the Excluded section to the Included section in order to include a column in the view or click the Delete (*X*) icon if you want to exclude a column from the view (1).

If you want columns to be separated in Groups, the Administrator has to add the appropriate group to the Included section (2).

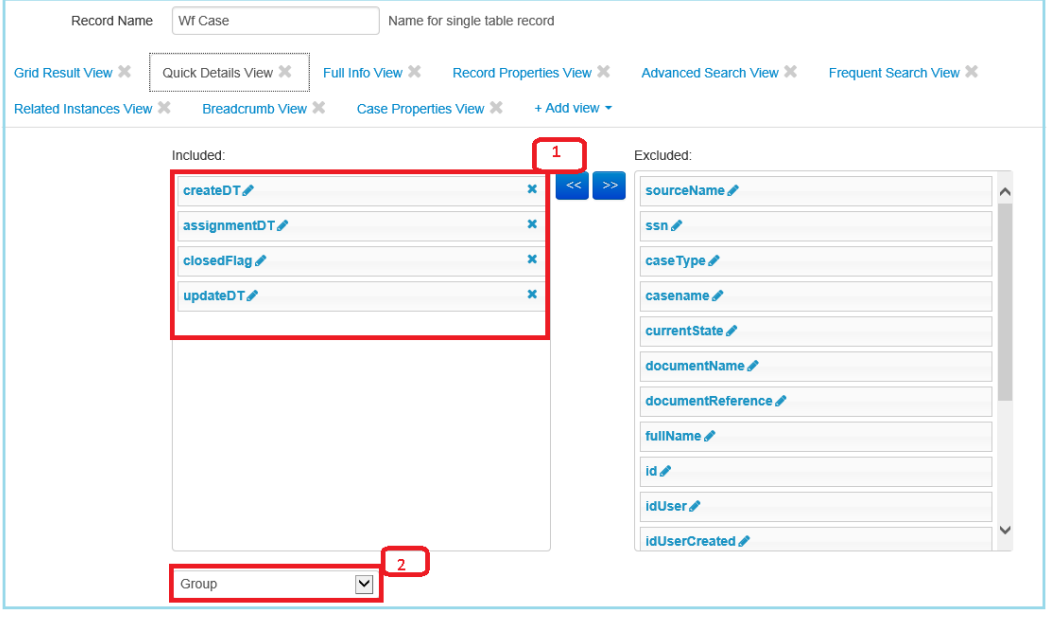
Note: For this view, names of groups will not be displayed. Instead of names, a horizontal line will appear.

Issues Pop Up

Administration panel is available for users with roles from a System Administrator.

In order to configure Issue pop-up windows, the administrator should navigate to the Tables tab and select the Instance table, *Wf Case table*.

That table consists of many views. Select *Quick Details 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 in order to include a column in the view or click the Delete (*X*) icon if you want to exclude a column from the view (1).

If you want columns to be separated in Groups, the Administrator has to add the appropriate group to the Included section (2).

Appendix A

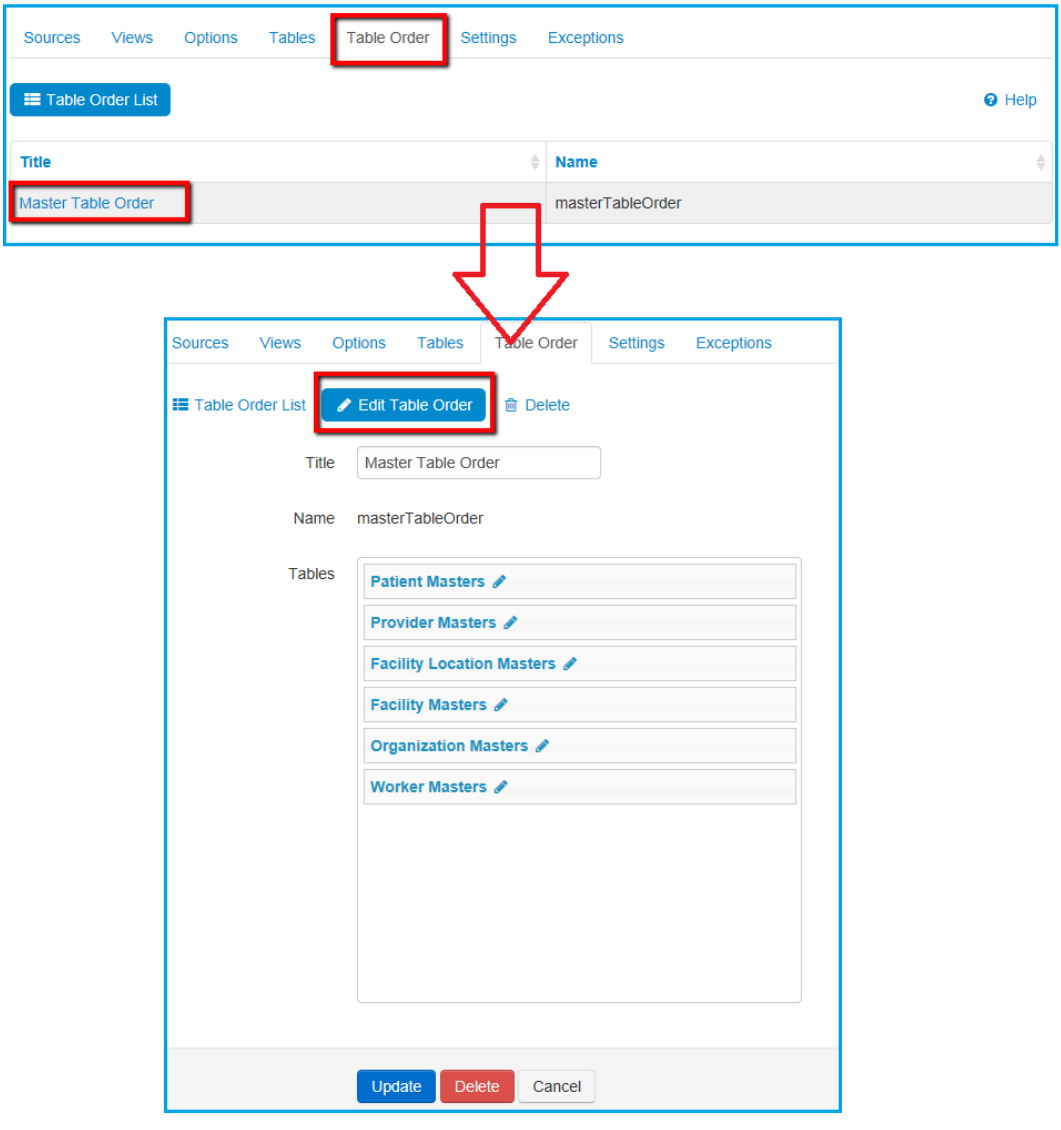
Using the Administration Console

This appendix describes how to use the Administration Console to configure administrative properties and functions that are reflected in the Omni Governance Console (OGC) 360 Viewer.

In this appendix:

Configuring the Order of Domains

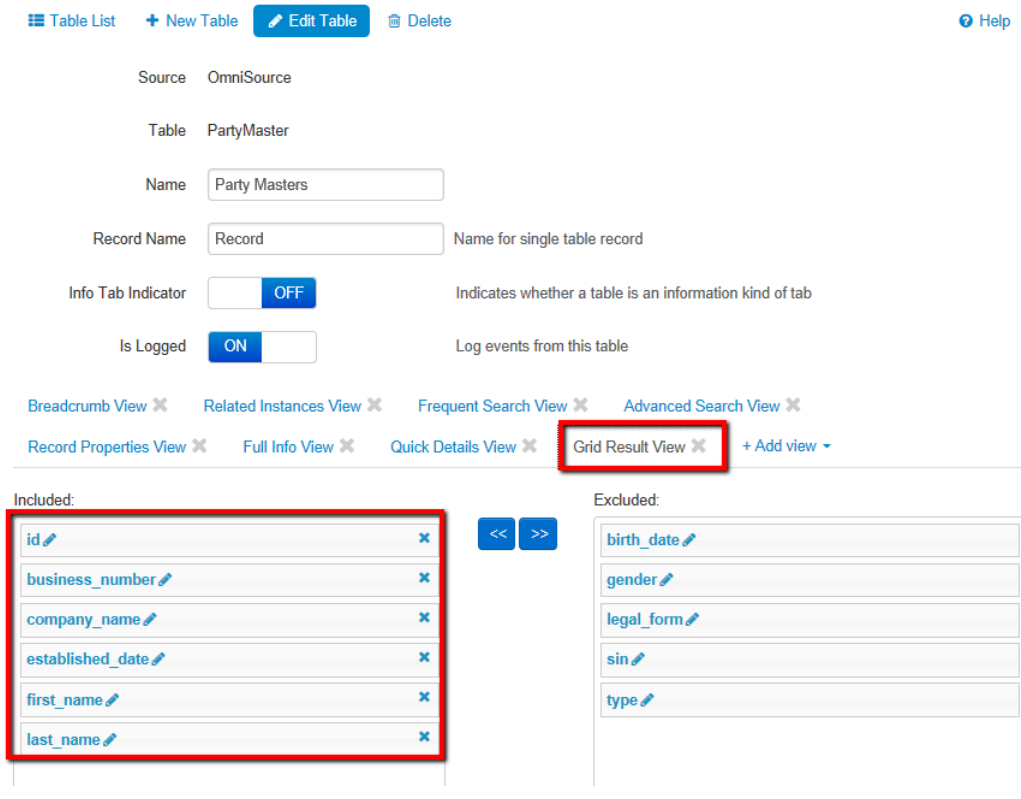
Using the Administration Console, this section describes how you can configure the order of Domains that appear in the Omni Governance Console (OGC) 360 Viewer.



Configuring and Editing Table Columns for the Grid Result View

Using the Administration Console, this section describes how you can configure and edit table columns (for example, within the Home and Search pages) for the Grid Result View.

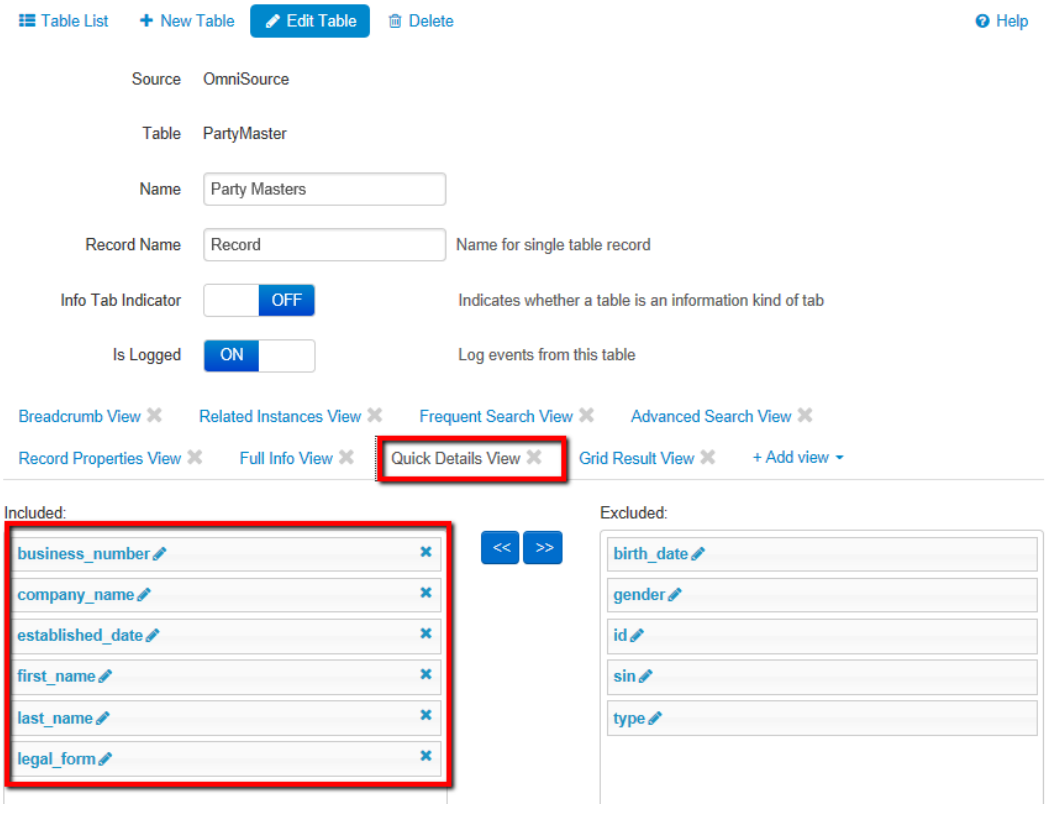
Specifically, you can specify which columns you want to include or exclude as required.



Configuring and Editing Table Columns for the Quick Details View

Using the Administration Console, this section describes how you can configure and edit table columns for the Quick Details View.

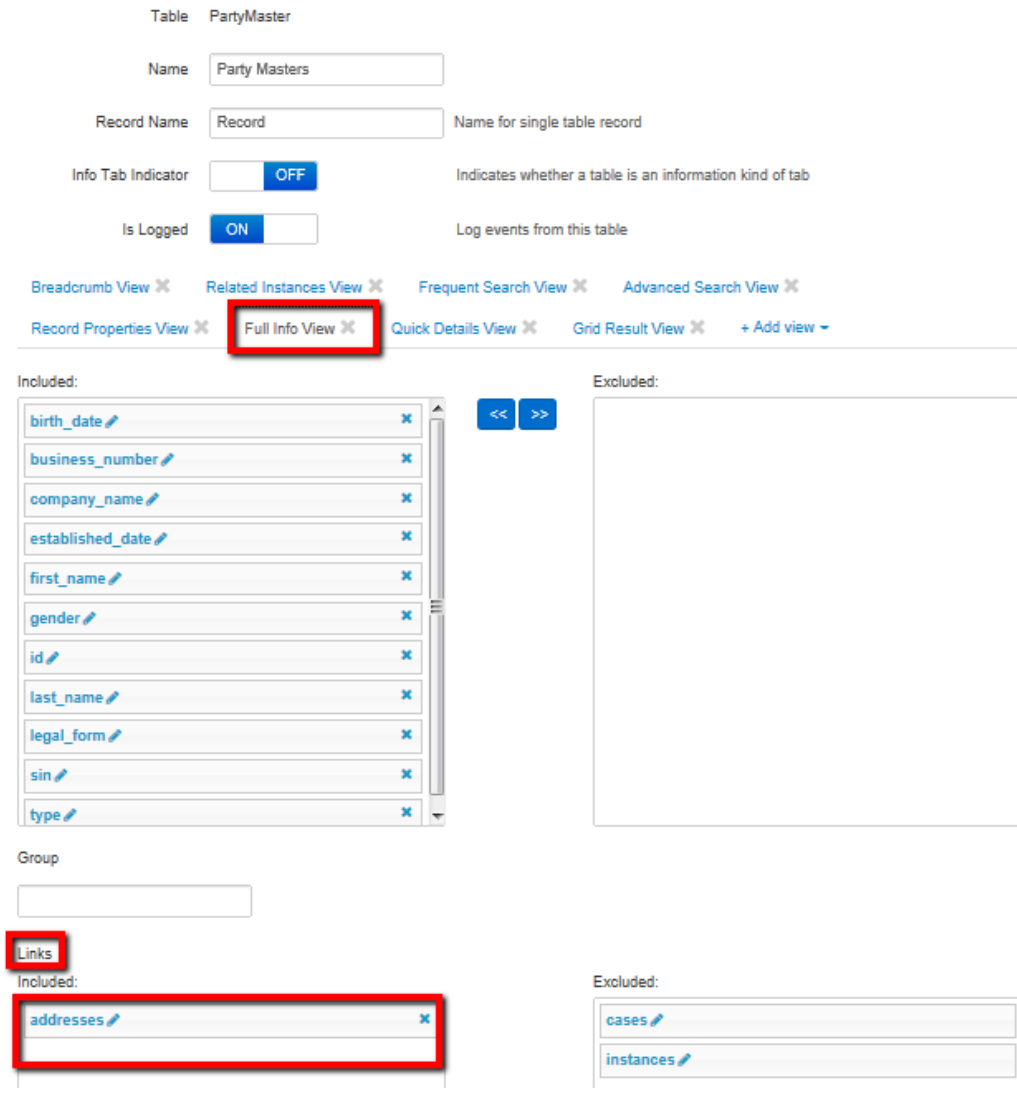
Specifically, you can specify which record details you want to include or exclude in the columns as required.



Configuring and Editing Subdomain Links for the Advanced Search Pane

Using the Administration Console, this section describes how you can configure and edit table columns for the Advanced Search pane.

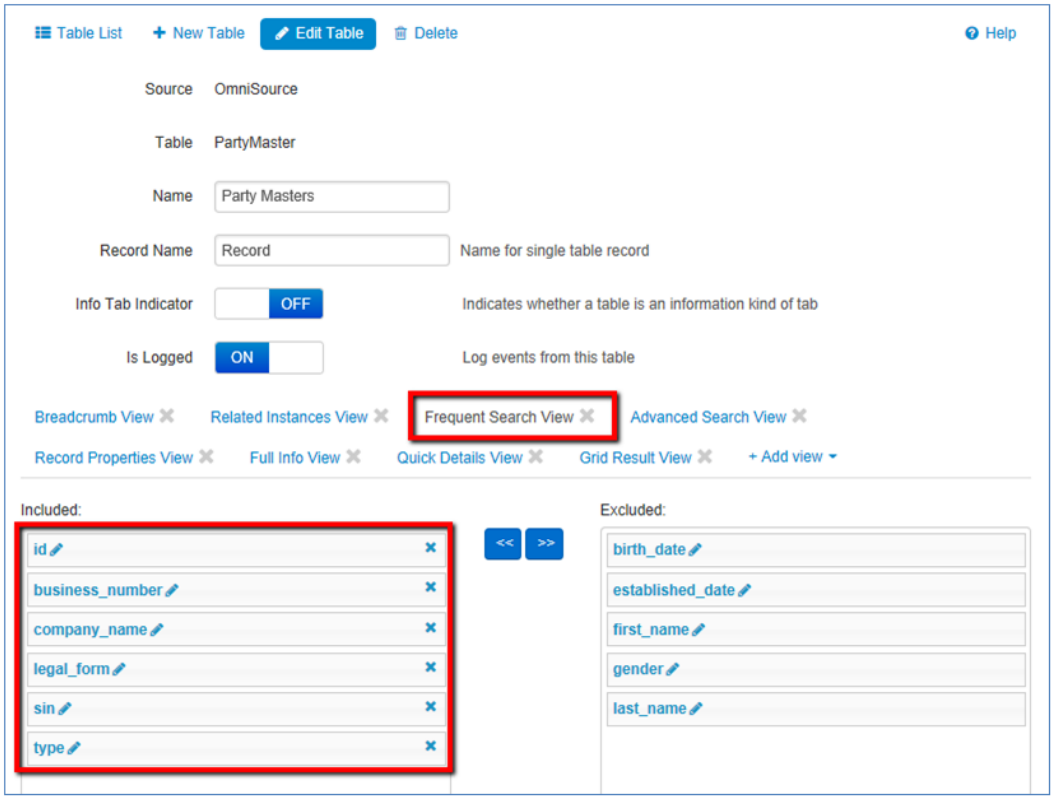
In addition, you can specify which required links you want to include or exclude in the Advanced Search View for a corresponding domain table.



Configuring and Editing Fields for the Advanced Search Pane

Using the Administration Console, this section describes how you can configure and edit fields for the Advanced Search pane.

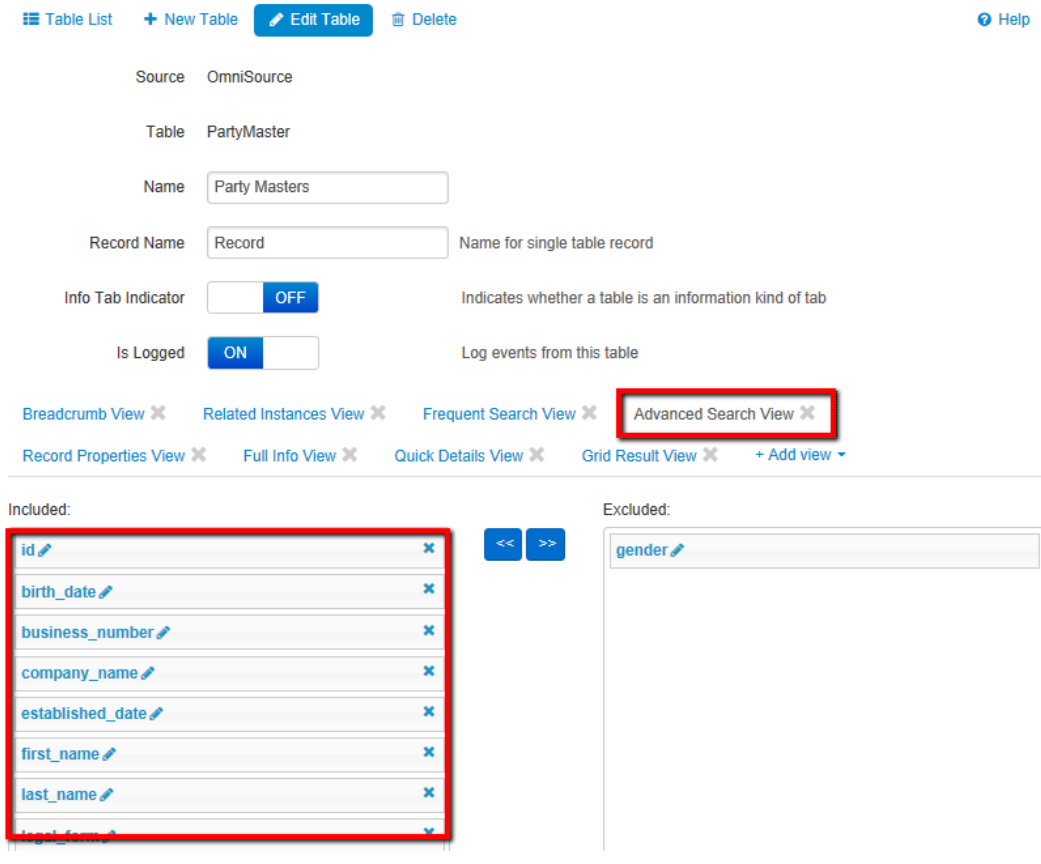
In addition, you can specify which required columns you want to include or exclude in the Frequent Search View.



Configuring the Advanced Search Sections and Selecting Attributes to Include

Using the Administration Console, this section describes how you can configure all advanced search sections, except the Frequent section.

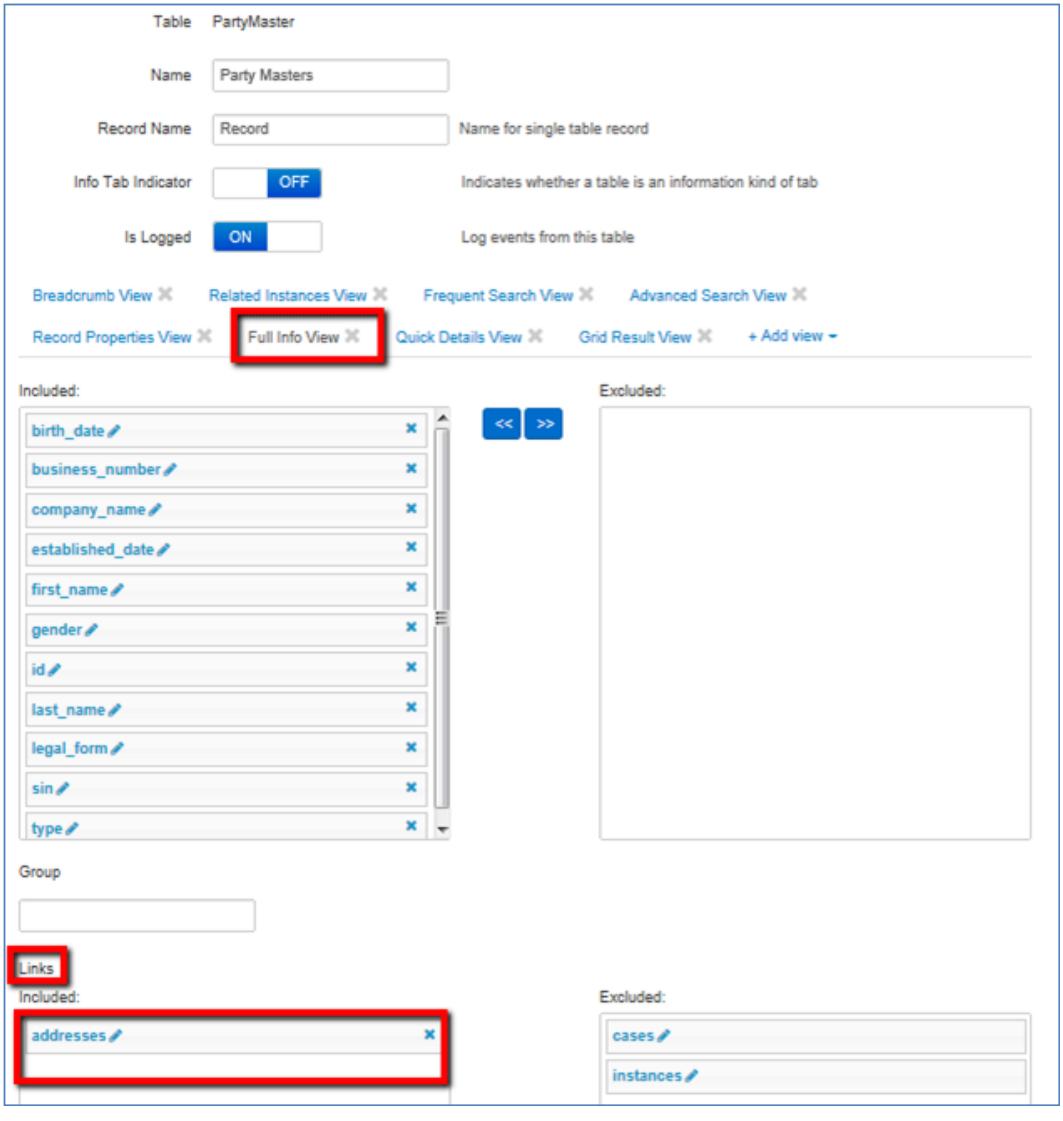
In addition, you can specify which required attributes you want to include or exclude in the Advanced Search View.



Configuring Subdomains for the Details 360 and Master Comparison Pages

Using the Administration Console, this section describes how you can configure subdomains for the Details 360 and Master Comparison pages.

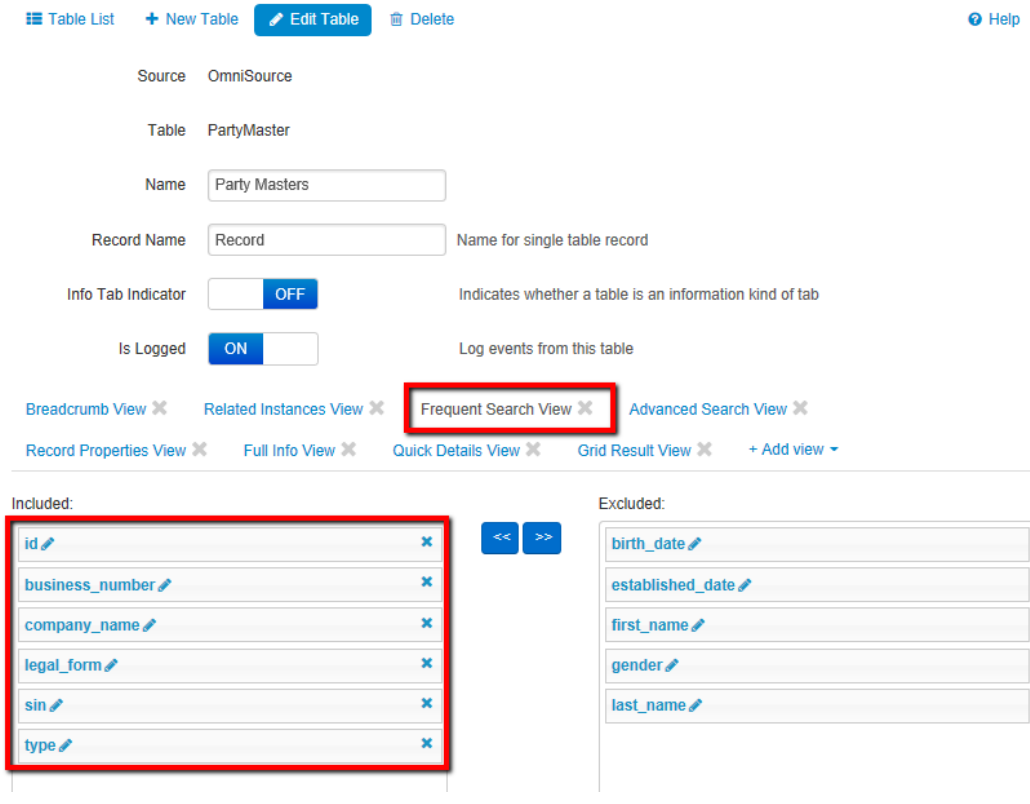
In addition, you can edit Master tables and specify which required links you want to include or exclude in the Full Info View.



Configuring Sections and Corresponding Attributes for Domains or Subdomains in the Details 360, Master Comparison, and Compare Source Pages

Using the Administration Console, this section describes how you can configuring sections and corresponding attributes for domains or subdomains in the Details 360, Master Comparison, and Compare Source pages.

In addition, you can specify which columns you want to include or exclude as required in the Full Info View.

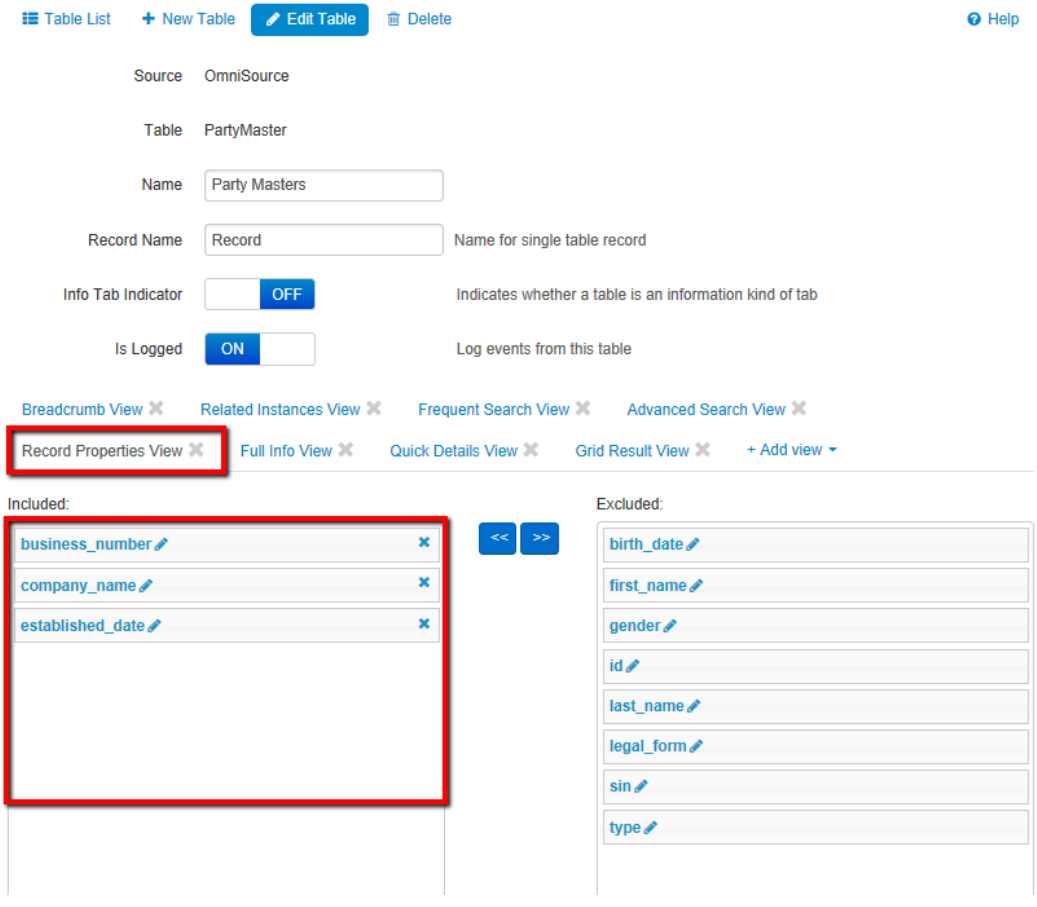


Configuring the Layout and Appearance of the Record Properties View

Using the Administration Console, this section describes how you can configure the layout and appearance of the Record Properties View in the Omni Governance Console (OGC) 360 Viewer. Specifically, how to:

- Configure the Record Properties section attributes.

- Include or exclude the required columns to appear in the Record Properties View.

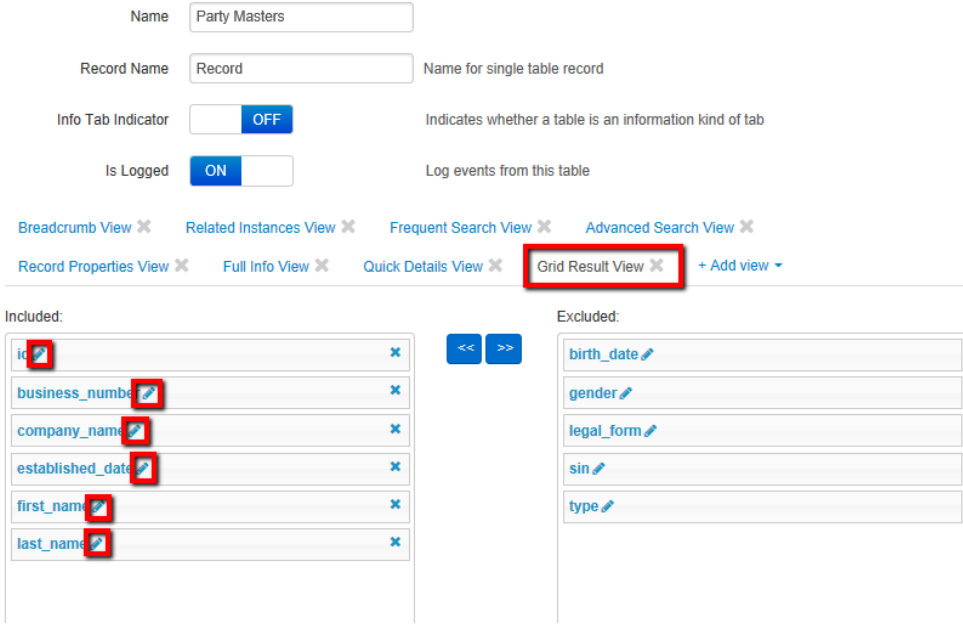


Configuring the Layout and Appearance of the Grid Result View

Using the Administration Console, this section describes how you can configure the layout and appearance of the Grid Result View in the Omni Governance Console (OGC) 360 Viewer. Specifically, how to:

- Configure the size.
- Configure the alignment of columns.

- Specify what columns can be sorted and filtered (indicated by the pencil icon).

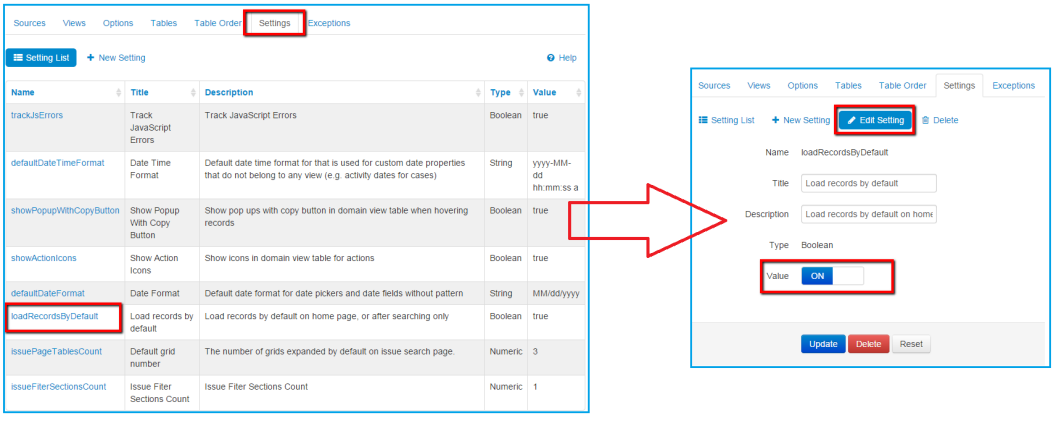


Specifying the Default State of the Home Page

To specify the default state of the Home Page:

1. Navigate to the Settings tab.
2. Select the *Load records by default* setting from the list and edit this setting as follows:
   a. Set Value to *ON* for the grid to be displayed on the Home page by default.

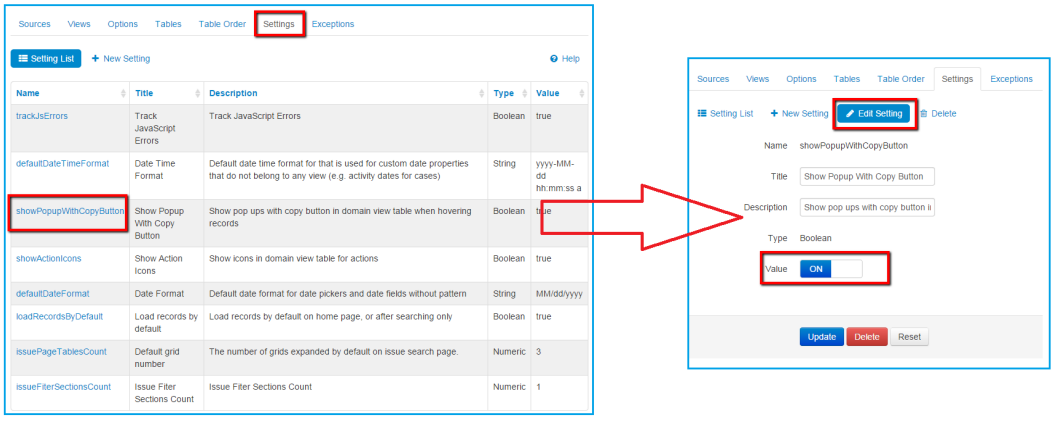
b. Set Value to *OFF* for the grid not to be displayed on the Home page by default.



Configuring Hints With the Copy Button

To configure hints with the Copy button:

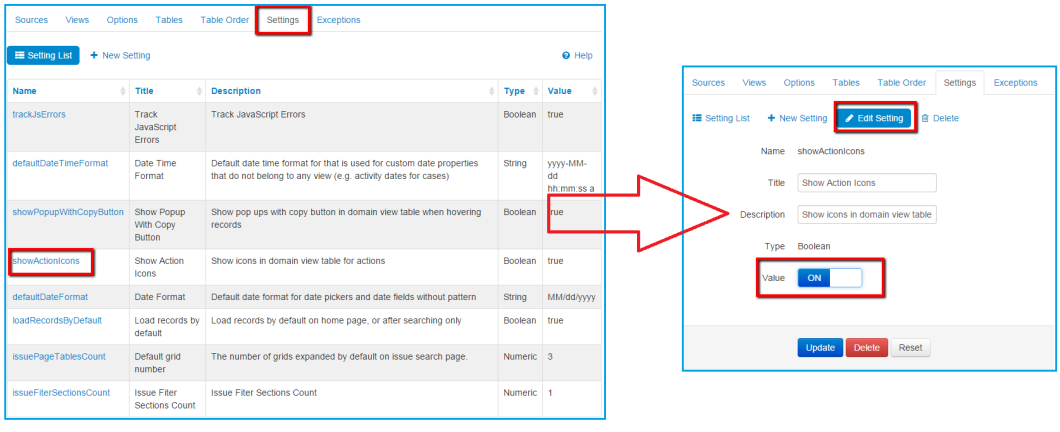
1. Navigate to the Settings tab.
2. Select the *Show pop up with Copy button* setting from the list and edit this setting as follows:
   a. Set Value to *ON* if hints with the Copy button should be displayed.
   b. Set Value to *OFF* if browser hints should be displayed.



Configuring the Display of the Master Comparison and Details 360 Links

To configure the display of the Master Comparison and Details 360 links:

1. Navigate to the Settings tab.
2. Select the *Show Action icons* setting from the list and edit this setting as follows:
   a. Set Value to *ON* if the Master Comparison and Details 360 links should be displayed as icons.
   b. Set Value to *OFF* if the Master Comparison and Details 360 links should be displayed as links.



Appendix B Configuring Omni Governance Console Roles From LDAP (Active Directory)

This appendix describes how to configure a WSO2 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

The following sections detail how to configure a WSO2 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.

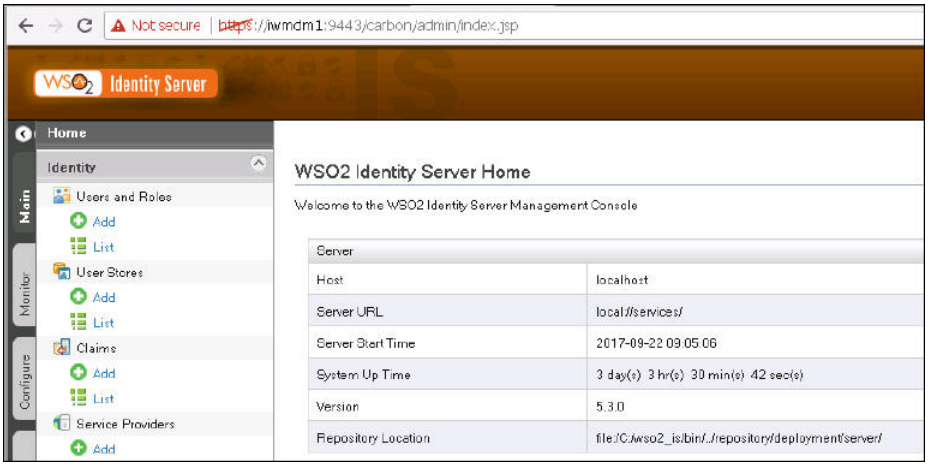
Procedure: How to Enable Authorization Permission from OGC Using Group Names Through LDAP

1. Connect to the WSO2_IS system administration console. For example:

   `https://your-wso2hostname:9443`

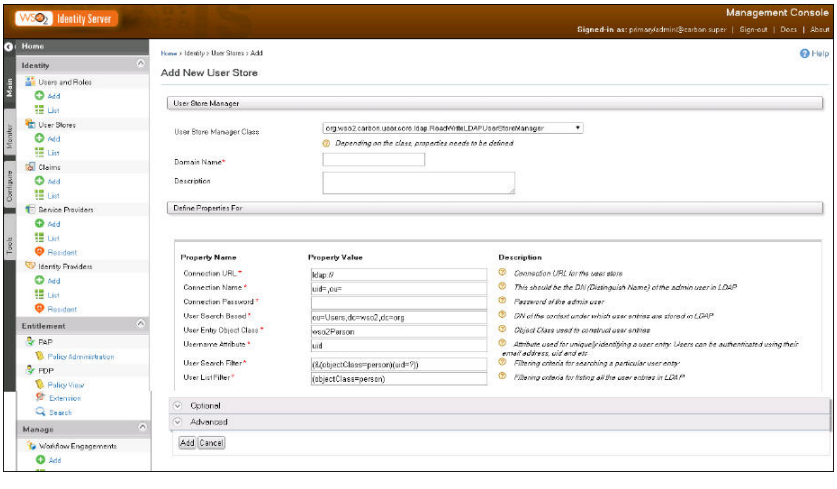
2. From the WSO2 homepage, log on with the WSO2_IS username and password of the administrator.

   The WSO2 Identity Server opens, as shown in the following image.



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

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



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

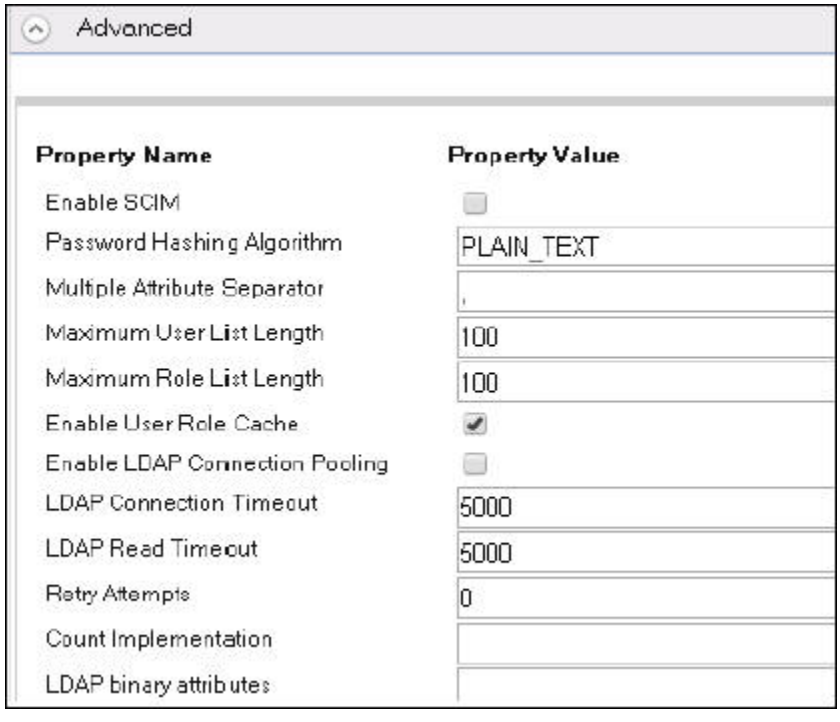
   Note: An asterisk denotes a required field.

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.



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 listl.

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:

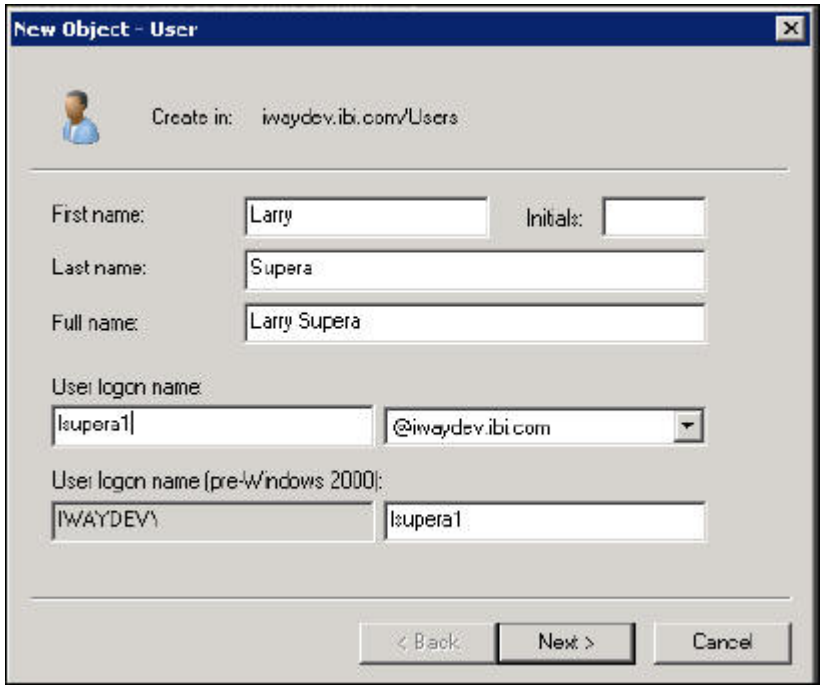
   - Username: **Administrator**
   - Password: **(LDAP authorized Password)**

2. Click *Start*, select *Administrative Tools*, and then click *Active Directory Users and Computers*.
3. Identify the corporate or privileged UserName and proceed to *How to Create Groups in Active Directory* on page 153.

   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 logon name fields, as shown in the following image.



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.

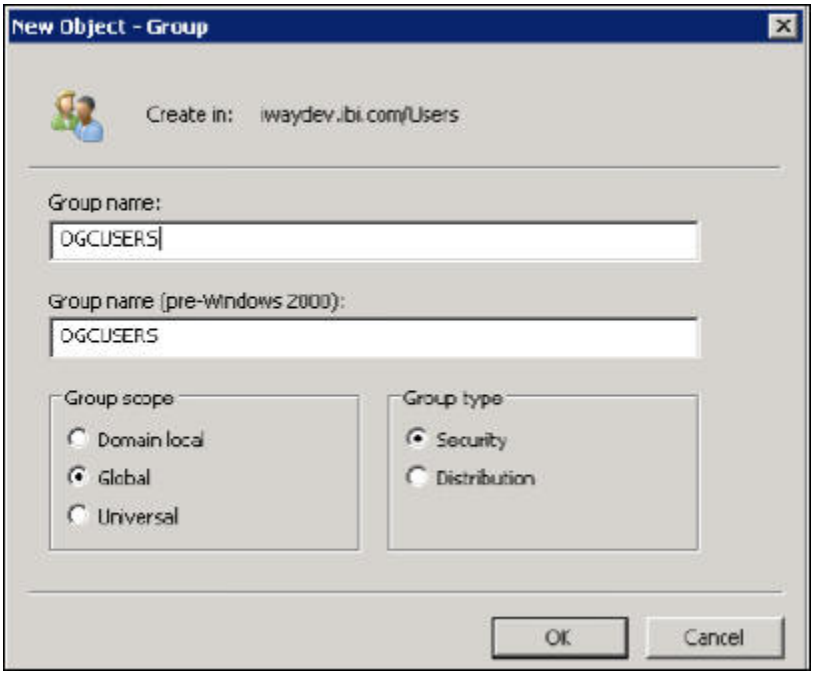
e. Click *Next*, and then click *Finish*.

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.

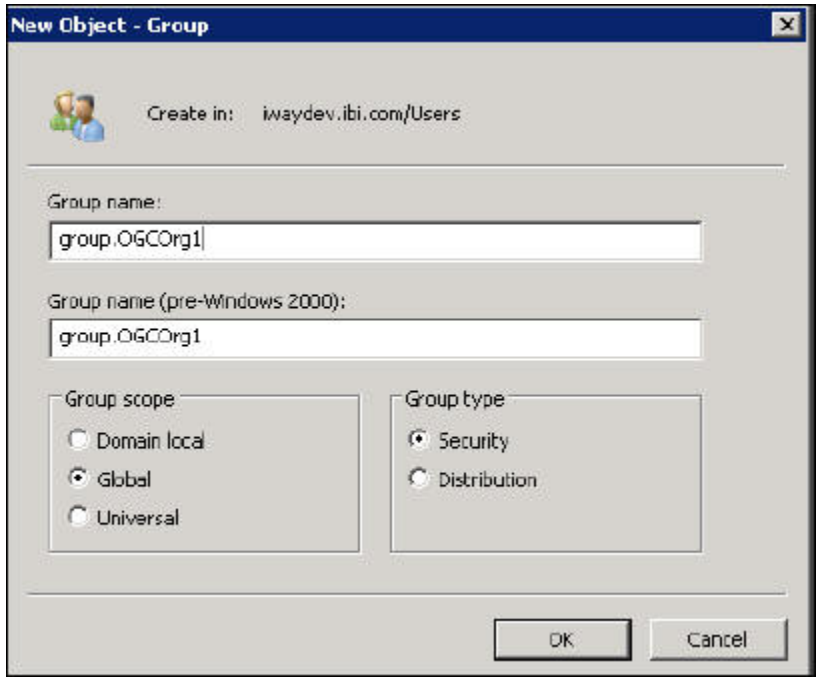
   For example, if Subject = Vendors, then create the groups domain.Vendors and domain.VendorsMaster.

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.

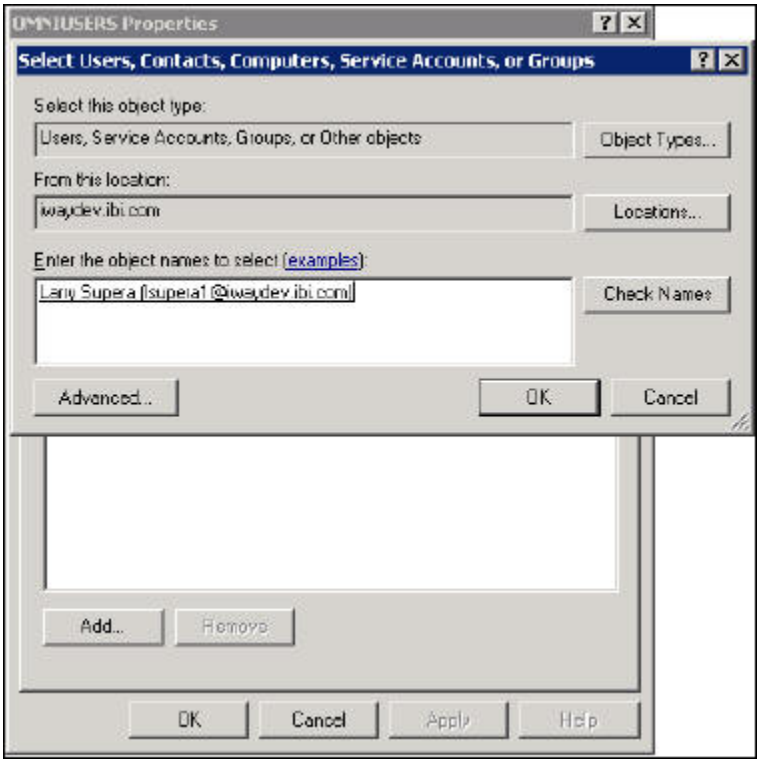
    To designate a user:

    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.

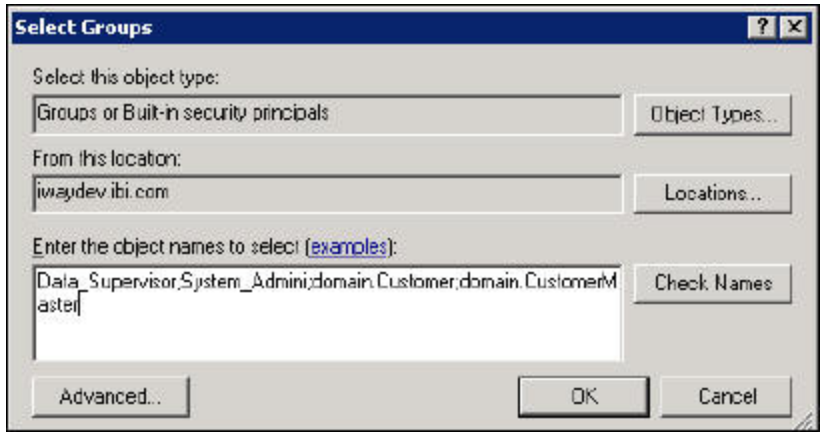
d. Click *Check Names*, as shown in the following image.



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.OGCOrg1.

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: **OGCUSERS/lsupera1**

      Password: **yogiBear123**

   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: **OGCUSERS/lsupera1**

      Password: **yogiBear123**

   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.

Feedback

Customer success is our top priority. Connect with us today!

Information Builders Technical Content Management team is comprised of many talented individuals who work together to design and deliver quality technical documentation products. Your feedback supports our ongoing efforts!

You can also preview new innovations to get an early look at new content products and services. Your participation helps us create great experiences for every customer.

To send us feedback or make a connection, contact Sarah Buccellato, Technical Editor, Technical Content Management at *Sarah_Buccellato@ibi.com.*

To request permission to repurpose copyrighted material, please contact Frances Gambino, Vice President, Technical Content Management at *Frances_Gambino@ibi.com.*

Information Builders

iWay

Omni-Insurance Omni Governance Console User's Guide

Version 3.12

DN3502371.0520

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