



Omni-Gen[™] for Customer User's Guide

Version 3.10

Active Technologies, EDA, EDA/SQL, FIDEL, FOCUS, Information Builders, the Information Builders logo, iWay, iWay Software, Parlay, PC/FOCUS, RStat, Table Talk, Web390, WebFOCUS, WebFOCUS Active Technologies, and WebFOCUS Magnify are registered trademarks, and DataMigrator and Hyperstage are trademarks of Information Builders, Inc.

Adobe, the Adobe logo, Acrobat, Adobe Reader, Flash, Adobe Flash Builder, Flex, and PostScript are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States and/or other countries.

Due to the nature of this material, this document refers to numerous hardware and software products by their trademarks. In most, if not all cases, these designations are claimed as trademarks or registered trademarks by their respective companies. It is not this publisher's intent to use any of these names generically. The reader is therefore cautioned to investigate all claimed trademark rights before using any of these names other than to refer to the product described.

Copyright © 2019, by Information Builders, Inc. and iWay Software. All rights reserved. Patent Pending. This manual, or parts thereof, may not be reproduced in any form without the written permission of Information Builders, Inc.

Contents

Pref	face	5
	Documentation Conventions	
	Related Publications	6
	Customer Support	6
	Help Us to Serve You Better	7
	User Feedback	9
	iWay Software Training and Professional Services	9
1 . lr	ntroducing Omni-Gen TM for Customer \dots	
	What is Omni-Gen [™] ?	
	Omni-Gen [™] for Customer	
	Related Documentation	12
2. Ir	nstalling Omni-Gen TM for Customer \dots	
	Omni-Gen TM for Customer Components Configuration Overview \dots	
	Omni-Gen [™] Installation Prerequisites	
	Install Omni-Gen Server and Omni Governance Console on Windows	
3. C	Configuring Omni-Gen TM for Customer \dots	
	Configuring Omni-Gen [™] for Customer	
	Loading Metadata (MData) Using the Omni Governance Console	
<u>л</u> н	Inderstanding the Omni-Gen TM for Customer Data Model \dots	
4 . U	Understanding the Omni-Gen [™] Customer Data Model	
	Customer.	
	Address.	
	SalesOrder	
	SalesOrderLine	
	Phone	
	Email	
	Account	
	AccountTeam	75
	Contact	76
	CustDemographics	77
	ltem	

SalesOrg	78
Reference Tables	79
Data Quality Rules	80
Cleansing	80
Matching	83
Merging	84
Remediation	84
5. Loading Sample Data	85
Accessing the Sample Data	85
Create the Database Connection	87
Load the Omni-Gen Relational OnRamp Tables	90
6. WSO2 Identity Server and MData Synchronization	97
Functional Overview	97
Using WSO2 Identity Server and MData Synchronization	97
Prerequisites	97
Using Synchronization	98
Step 1: Initialization of the Analysis for the Sync	99
Step 2: Progressing the Analysis.	99
Step 3: Summarizing the Analysis.	100
Step 4: Viewing Analysis Details	100
Step 5: Customizing Roles/Users to be Synchronized (Optional)	101
Step 6: Customizing Updated Policies	102
Step 7: Executing the Actual Synchronization	102
Step 8: Summarizing the Synchronization.	103
Configuring the Environment	103

This documentation describes how to install and use Omni-GenTM for Customer. It is intended for developers and administrators of Master Data Management (MDM) and Data Quality (DQ) solutions who are using Omni-GenTM.

How This Manual Is Organized

This manual includes the following chapters:

	Chapter/Appendix	Contents
1	Introducing Omni-Gen [™] for Customer	Provides an overview of Omni-Gen TM and introduces Omni-Gen TM for Customer.
2	Installing Omni-Gen [™] for Customer	Describes how to install Omni-Gen [™] for Customer.
3	Configuring Omni-Gen [™] for Customer	Describes how to configure Omni-Gen [™] for Customer.
4	Understanding the Omni- Gen™ for Customer Data Model	Provides reference information for the Omni-Gen [™] for Customer data model.
5	Loading Sample Data	Describes how to load sample data for Omni-Gen [™] for Customer.
6	WS02 Identity Server and MData Synchronization	Describes how to synchronize internal data structures using Omni Governance Console (OGC) when adding a new subject.

Documentation Conventions

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

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

Convention	Description
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.
8	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 <i>not</i> occur?	

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

- □ Input documents (XML instance, XML schema, non-XML documents)
- □ Transformation files
- Error screen shots
- Error output files
- Trace files
- 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

Introducing Omni-GenTM for Customer

This section provides an overview of $\mathsf{Omni}\text{-}\mathsf{Gen}^{^{\mathsf{TM}}}$ and introduces $\mathsf{Omni}\text{-}\mathsf{Gen}^{^{\mathsf{TM}}}$ for Customer.

In this chapter:

- **What is Omni-GenTM**?
- □ Omni-Gen[™] for Customer
- Related Documentation

What is Omni-Gen[™]?

Omni-Gen is an enterprise solution from Information Builders that accelerates the deployment of complete master data management (MDM), data quality (DQ), and data integration applications. It can be thought of as master data or data quality in a box, and allows for traditional integration and big data integration.

Omni-Gen automates best practices associated with multi-domain MDM implementations. These processes involve data integration, cleansing, and mastering, and are usually implemented manually, with months spent on specification, design, coding, and testing.

Omni-Gen, by contrast, enables organizations to rapidly develop the models and golden records they require for a result, and then automatically generates the processes needed to complete the job. By default, Omni-Gen provides change history and cross-domain references management. This ensures a better and more comprehensive result on the very first cut of a project.

Key features and components that are provided by Omni-Gen include:

- Omni Designer provides a visual (business-centric) model-driven and agile-enabled environment for the definition of multiple interrelated MDM domains (for example, golden records), along with reference data and rules for cleansing, validating, and mastering records.
- Omni Governance Console (OGC) allows business users to view, monitor, compare, and report on mission-critical data; identify and rectify faulty information; and create a complete, historical web-based view of mastered golden records.

- Data Quality Workbench allows you to analyze data and create rules for data standardization and enrichment without any previous knowledge of DQ products. You can access Data Quality Workbench through the OGC.
- Data Quality Monitor provides information about the data quality of records in your system and its impact on business. This information can be used for further analysis and provides a basis for business decisions. You can access Data Quality Monitor through the OGC.
- Omni-Gen Server maintains auditable history, reconciliation of master data references, remediation processing, enhanced application logging, and more.

Omni-Gen is available in three editions:

- □ Integration Edition, which includes everything you need for data profiling and sophisticated integration projects.
- Data Quality Edition, which includes everything in the Integration Edition and adds technology for data cleansing and remediation.
- Master Data Management Edition, which includes everything in the Data Quality Edition and adds technology, such as automated match/merge, for data mastering.

Omni-Gen[™] for Customer

Omni-Gen[™] for Customer is a prepackaged solution for mastering the Customer domain. It provides all of the required components including a predefined model, DQ rules, and OGC perspectives. This all-in-one prepackaged mastering solution can also be extended to meet specific client requirements and demands.

Related Documentation

The Omni-Gen[™] for Customer User's Guide references several key components that are included with the product. For more information, you can refer to the following documentation set that is provided with Omni-Gen[™] Master Data Management (MDM) and Data Quality (DQ) Editions:

- □ Omni-Gen[™] MDM and DQ Editions Release Notes
- □ Omni-Gen[™] Installer User's Guide
- □ Omni-Gen[™] Operation and Management Guide
- □ Omni-Gen[™] API Services Reference Guide
- Gunni Console User's Guide

- Data Quality Monitor Installation and Configuration Guide
- Data Quality Monitor User's Guide
- Data Quality Workbench User's Guide
- □ Omni[™] Designer User's Guide
- □ Omni-Gen[™] Relational OnRamp User's Guide
- □ Omni-Gen[™] Address Cleansing (Loqate) Installation and Configuration Guide



Installing Omni-Gen[™] for Customer

This section describes how to install $\mathsf{Omni}\text{-}\mathsf{Gen}^{^{\mathsf{TM}}}$ for Customer.

In this chapter:

- □ Omni-Gen[™] for Customer Components Configuration Overview
- □ Omni-Gen[™] Installation Prerequisites
- Install Omni-Gen Server and Omni Governance Console on Windows

Omni-Gen[™] for Customer Components Configuration Overview

Omni-Gen[™] for Customer can be installed on Windows (64-bit) platforms.

The Omni-Gen installer is developed using InstallAnywhere and follows common installer models.

First, installation information is collected from the user through a series of prompts. Then, an image is installed to the file system specified by the user, and finally, the contents of the image are configured based on the collected information.

Omni-Gen[™] Installation Prerequisites

Before Omni-Gen[™] for Customer, which includes Omni-Gen Server (OGS) and the Omni Governance Console (OGC), are installed, ensure that the following prerequisites are configured on your environment:

1. One or two empty database schemas must be built and ready for use.

Note: The creation of the database is generally the responsibility of a database administrator.

A database administrator's user name and password for the database(s) must also be available.

OmniGen uses the following logical sets of tables to perform MDM and OGC functions:

- □ **Mastering (Database) Tables.** This is automatically created in the same database, specified in the prompts for the Remediation Database of the OmniGen Installer.
- **Remediation Tables.** This is automatically created in the same database, specified in the prompts for the Remediation Database of the OmniGen Installer.

- ❑ Data Quality Repository Tables (commonly referred to as the "repo" database). This is created in the location specified in the prompts for the Data Quality (DQ) Database of the OmniGen Installer. When configuring the two (Remediation and DQ) database locations, you can configure two separate locations for Remediation and DQ, or you can configure one location for all the tables. The example in this document uses two different database names, one for Remediation tables and the other for DQ tables.
- 2. Java Development Kit (JDK) Version 1.8.121 or higher.

Note: Omni-Gen Server (OGS) and Omni Governance Console (OGC) requires Java Development Kit (JDK) version 8.

- a. Verify that the JAVA HOME environment variable is defined properly.
- b. Verify that %JAVA HOME%\bin is the first element in your PATH.
- 3. Acquire the required DBMS specific JDBC .jar files for use by OGC and ensure these files are available on the machine where OGC will be installed.
 - DB2: db2jcc4.jar, db2jcc_license_cu.jar
 - □ Oracle: ojdbc7.jar
 - Destgres: postgresql-9.3-1102.jdbc4.jar
 - SQL Server (Microsoft): sqljdbc42.jar
 - SQL Server (Open Source): jtds-1.3.1.jar
- 4. Ensure that the database server is configured to allow TCP connections and that the TCP ports are active.
- 5. Ensure that you have the proper administrative rights to modify the Java CA certificate (cacerts) store and add files to the following directory:

JAVA_HOME/jre/lib/security

Modifying cacerts is required for interacting with the WSO2 Identity Server (WSO2 IS).

6. Source Management (Software Versioning and Revision Control System)

A source management system, such as Apache Subversion (SVN) or Git must be installed on a local or remote system. The iWay Data Quality Server (DQS) design-time environment must be updated with the proper plug-in to source manage the DQS-related components in the configured source management system. You can obtain the required plug-in for the Eclipse-based environment from the source management system provider or a third-party.

7. GBG Logate Address Verification

Loqate is used to facilitate address cleansing operations and must be installed on the system where $\mathsf{Omni-Gen}^{\mathsf{TM}}$ for Customer is running.

The recommended installation location (destination folder) is C:\logate, which matches the default location that is specified in the Data Quality (DQ) cleansing plans that are prepackaged with Omni-GenTM for Customer. If you choose a different installation location, then you will have to manually update the Logate step in each DQ cleansing plan with your specific path.

For more information on downloading Loqate and obtaining a required license, contact iWay Customer Support. For more information on installing and configuring Loqate, see the *Omni*-GenTM Address Cleansing (Loqate) Installation and Configuration Guide.

Install Omni-Gen Server and Omni Governance Console on Windows

This procedure assumes that a database server (for example, an MS SQL Server), a Repository Server (for example, SVN), and iWay Data Quality Suite (DQS), are already installed.

- 1. Verify that the JAVA HOME environment variable (for Java Development Kit version 8) is defined properly and that %JAVA HOME%\bin is the first element in your PATH.
- 2. Download the installer (*omnigen-installer-3.10.1491-Windows-CUSTOMER.exe*) from the Information Builders Technical Support Center.

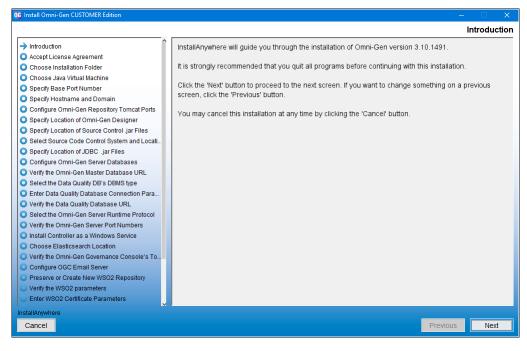
http://techsupport.informationbuilders.com

3. In the File Explorer, right-click the downloaded *omnigen-installer-3.10.1491-Windows-CUSTOMER*.exe file and select *Run as administrator*.

InstallAnywh	ere	
ٹ	InstallAnywhere is preparing to install	
	68%	
		Cancel

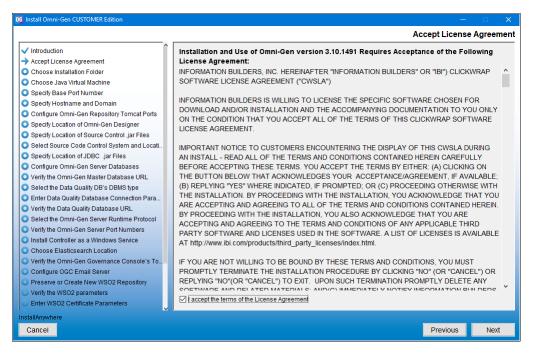
The InstallAnywhere window appears, as shown in the following image.

When the install is ready to begin, the Install Omni-Gen CUSTOMER Edition window opens, as shown in the following image.



4. Click Next.

The Accept License Agreement dialog box opens, as shown in the following image.



5. Read the License Agreement, select the *I* accept the terms of the License Agreement check box, and then click Next.

The Choose Installation Folder dialog box opens, as shown in the following image.

		Choose in	stallation Folder
✓ Introduction			
 Accept License Agreement 	Please specify the folder which will be the root of this installation	n.	
Choose Installation Folder			
 Choose Java Virtual Machine 			
 Specify Base Port Number 			
 Specify Hostname and Domain 			
Configure OmniGen Repository Tomcat Ports	Where would you like to install?		
Specify Location of OmniGen Designer	C:\omniaen		
Specify Location of Source Control .jar Files	o. on a gon		
Select Source Code Control System and Locati		Restore Default Folder	Choose
 Specify Location of JDBC .jar Files 			
 Configure OmniGen Server Databases 			
Verify the OmniGen Master Database URL			
Select the Data Quality DB's DBMS type			
Enter Data Quality Database Connection Para			
Verify the Data Quality Database URL			
Select the OmniGen Server Runtime Protocol			
Verify the OmniGen Server Port Numbers			
Install Controller as a Windows Service			
Choose Elasticsearch Location			
Verify the OmniGen Governance Console's To			
Configure OGC Email Server			
Preserve or Create New WSO2 Repository			
Verify the WSO2 parameters			
Enter WSO2 Certificate Parameters			
InstallAnywhere			
Cancel		Previou	s Next

6. In the *Where would you like to install* field, type the location where you wish to install all of the required files for Omni-Gen.

The installer will create a file tree named *OmniGen* in the location you have specified. For example, if you accept the default location as C:\, then the installer will install Omni-Gen to:

C:\OmniGen

7. Click Next.

The Choose Java Virtual Machine dialog box opens, as shown in the following image.

		Choose Java Virtual Machine
✓ Introduction	Please Choose a Java VM for Use by the installed application	
✓ Accept License Agreement	C:\Program Files\Java\jdk1.8.0 181\bin\java.exe	
✓ Choose Installation Folder	C:\Program Files\Java\jdk1.8.0 172\bin\java.exe	
-> Choose Java Virtual Machine		
Specify Base Port Number		
 Specify Hostname and Domain 		
O Configure OmniGen Repository Tomcat Ports		
Specify Location of OmniGen Designer		
Specify Location of Source Control .jar Files		
Select Source Code Control System and Locati		
Specify Location of JDBC .jar Files		
Configure OmniGen Server Databases		
Verify the OmniGen Master Database URL		
Select the Data Quality DB's DBMS type		
Enter Data Quality Database Connection Para		
Verify the Data Quality Database URL		
Select the OmniGen Server Runtime Protocol		
Verify the OmniGen Server Port Numbers		
 Install Controller as a Windows Service 		
Choose Elasticsearch Location		
Verify the OmniGen Governance Console's To		
Configure OGC Email Server		
Preserve or Create New WSO2 Repository		
Verify the WSO2 parameters	Search Another Location	Choose Java Executable
Enter WSO2 Certificate Parameters	Search Another Eocation	Choose Java Executable
InstallAnywhere		
Cancel		Previous Next

8. Ensure that the Java version located is version 1.8 or higher, and then click Next.

As of Omni-Gen version 3.6.0, the Specify Base Port Number dialog box opens, as shown in the following image.

		Specify Base Port Number.
Introduction Accept License Agreement	Choose a port number as the starting point.	
 Choose Installation Folder 		
 Choose Java Virtual Machine 		
Specify Base Port Number		
Specify Hostname and Domain		
Configure OmniGen Repository Tomcat Ports		
Specify Location of OmniGen Designer		
Specify Location of Source Control .jar Files		
Select Source Code Control System and Locati		
Specify Location of JDBC .jar Files		
Configure OmniGen Server Databases		
Verify the OmniGen Master Database URL		
Select the Data Quality DB's DBMS type		
Enter Data Quality Database Connection Para		
Verify the Data Quality Database URL	Base Port Number	9500
Select the OmniGen Server Runtime Protocol		·
Verify the OmniGen Server Port Numbers		
Install Controller as a Windows Service		
Choose Elasticsearch Location		
Verify the OmniGen Governance Console's To		
Configure OGC Email Server		
Preserve or Create New WSO2 Repository		
Verify the WSO2 parameters		
Enter WSO2 Certificate Parameters		
InstallAnywhere		
Cancel		Previous Next

9. Specifying a base port number automatically assigns a set of port numbers for use by Omni-Gen components, and is used when installing more than one instance of Omni-Gen on a single machine. If you are installing a second instance of Omni-Gen, or need to configure different ports to avoid conflicts with systems already deployed on your Omni-Gen host, then see your system administrator. Otherwise, click *Next* to continue. The Specify Hostname and Domain dialog box opens, as shown in the following image.

		Specify Hostname and Domain
✓ Introduction		
✓ Accept License Agreement	Enter the Hostname and Domain	
 Choose Installation Folder 		
 Choose Java Virtual Machine 		
 Specify Base Port Number 		
Specify Hostname and Domain		
Configure OmniGen Repository Tomcat Ports	Hostname	TCMAPPSA
Specify Location of OmniGen Designer	Hostilaille	TCWAPPSA
Specify Location of Source Control .jar Files	Domain	ibi.com
Select Source Code Control System and Locati		
Specify Location of JDBC .jar Files		
Configure OmniGen Server Databases		
Verify the OmniGen Master Database URL		
Select the Data Quality DB's DBMS type		
Enter Data Quality Database Connection Para		
Verify the Data Quality Database URL		
Select the OmniGen Server Runtime Protocol		
Verify the OmniGen Server Port Numbers		
Install Controller as a Windows Service		
Choose Elasticsearch Location		
Verify the OmniGen Governance Console's To		
Configure OGC Email Server		
Preserve or Create New WSO2 Repository		
Verify the WSO2 parameters		
Enter WSO2 Certificate Parameters		
InstallAnywhere		
Cancel		Previous Next

The default host name is the machine on which you are currently installing.

10. In the Domain field, type the host domain, and then click Next.

The Configure OmniGen Repository Tomcat Ports dialog box opens, as shown in the following image.

	Configure OmniGen Repository Tomcat Ports
Introduction Accept License Agreement Choose Installation Folder Choose Java Virtual Machine Specify Base Port Number Specify Base Port Number Specify Location of Source Control jar Files Select Source Control jar Files Select Source Control Jar Files Select Source Control Jar Files Configure OmniGen Repositor Tomcat Ports Specify Location of DBC. Jar Files Configure OmniGen Baser Database Verify the OmniGen Master Database URL Select the Data Quality DB's DBMS type Enter Data Quality DB's DBMS type Enter Data Quality Database URL Select the OnniGen Server Port Numbers Install Controller as a Windows Service Choose Elasticsearch Location Verify the OmniGen Governance Console's To Configure OGC Email Server Preserve or Create New WSO2 Repository Verify the WSO2 parameters Enter WSO2 Certificate Parameters	Configure OmniGen Repository Tomcat Ports The defaults suggested below allow both Tomcat servers: OmniGen Repository, and Omnigen Governance Console (OGC) to run without conflict. Unless your System Administrator or Security Management instructs you to change these ports to avoid other local conflicts, leave these ports set to the defaults below. Enter the OmniGen Repository Tomcat information HTTP Port 9516 Ajp Port 9517 HTTPS Port 9518 Shutdown Port 9515
InstallAnywhere	
Cancel	Previous Next

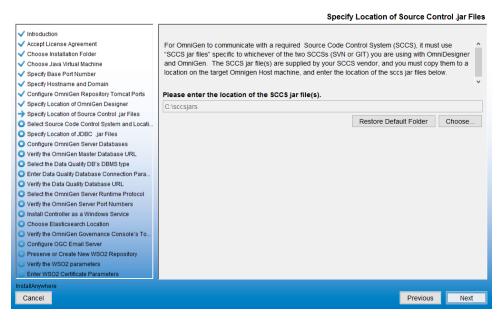
- 11. Verify the ports that are indicated by default and modify accordingly, if required.
- 12. Click Next.

The Specify Location of OmniGen Designer dialog box opens, which prompts for the parameters that define the location of Omni Designer, as shown in the following image.

		Specify Location of OmniGen Designer
Introduction Accept License Agreement Choose Installation Folder Choose Java Virtual Machine Specify Base Port Number Specify Base Port Number Specify Location and Domain Configure OmniGen Repository Torncat Ports Specify Location of OmniGen Designer Specify Location of Source Control Jar Files Select Source Code Control System and Locati Specify Location of JDBC jar Files	from data you h leave these val Enter Location Bridge Host	ports and location assume a standard installation of OmniGen Designer, and are supplied have already entered. Unless you have done a custom OmniGen Designer installation, lues as proposed. and Parameters of the OmniGen Designer TCMAPPSA
Configure OmniGen Server Databases Verify the OmniGen Master Database URL Select the Data Quality DB's DBMS type Enter Data Quality Database Connection Para Verify the Data Quality Database URL Select the OmniGen Server Runthme Protocol Verify the OmniGen Server Port Numbers Install Controller as a Windows Service Choose Elasticsearch Location Verify the OmniGen Governance Console's To Configure OGC Email Server Preserve or Create New WSQ2 Repository Verify the WSQ2 parameters Enter WSQ2 Certificate Parameters	EMF Store Port	9519 t 9520 igner Workspace Directory mnlGenData/OmnlDesignerWorkspace Restore Default Choose
InstallAnywhere Cancel		Previous Next

13. Accept the default parameters, and then click Next.

The Specify Location of Source Control .jar Files dialog box opens, which prompts you to select a folder containing the Source Code Control System (SCCS) .jar files, as shown in the following image.



14. Change the location of the SCCS .jar files, if necessary, and then click Next.

If you have not created a folder for the SCCS .jar files, then the following message displays:



If you receive this message, click *Cancel* and then create a new folder. Place the SCCS .jar files in that folder and click *Choose* in the Specify Location of Source Control .jar Files pane to navigate and select that new folder.

The Select Source Code Control System and Location dialog box that opens, as shown in the following image.

 Introduction Accept License Agreement Choose installation Folder Shocky Base Port Number Specify Base Port Number Specify Location of Server Control Jar Files Select the OmniGen Master Database URL Select the OnniGen Server Port Numbers Select the OnniGen Governance Console's To Configure OCC Emails Berer Preserve or Crate New WSQ2 Repository Verify the WSQ2 parameters Enter WSQ2 Certificate Parameters Instal/Worker 			Select Source Code Control System and Location
	Accept License Agreement Choose Installation Folder Choose Java Virtual Machine Specify Base Port Number Specify Base Port Number Specify Location of Oomi Gen Designer Specify Location of Oomi Gen Designer Select Source Code Control Jar Files Select Source Code Control System and Locati Specify Location of JDBC Jar Files Select Source Code Control System and Locati Specify Location of Source Control Jar Files Select Source Code Control System and Locati Specify Location of JDBC Jar Files Configure OmniGen Master Database URL Select the Data Quality DB's DBMS type Enter Data Quality DB's DBMS type Enter Data Quality Database Contection Para Verify the Data Quality Database URL Select the OmniGen Server RontInum Protocol Verify the OmniGen Server Port Numbers Install Controller as a Windows Service Choose Elasticsearch Location Verify the OmniGen Governance Console's To Configure OGC Email Server Preserve or Create New WSO2 Repository Verify the WSO2 parameters Enter WSO2 Centificate Parameters	defaults for each entered in this in Select the Source	a SCCS choice are supplied for a standard SCCS install, and from information already staller session.
Cancel Previous Next	Cancel		Previous Next

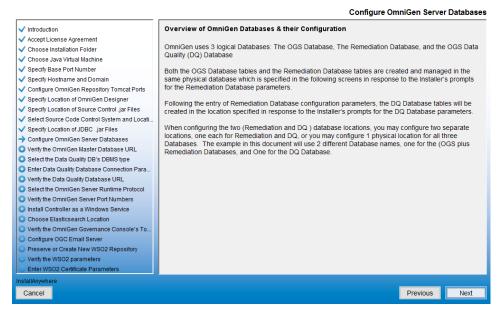
- 15. Define the location and credentials for your source control repository by selecting either *svn* or *git*.
- 16. Click Next.

The Specify Location of JDBC .jar Files dialog box opens, as shown in the following image.

		Specify Location of J	DBC .jar Files
✓ Introduction			
✓ Accept License Agreement	OmniGen uses a DBMS specific .jar file(s) to implement the JDE	3C protocol and communicat	te with the
Choose Installation Folder	DBMS. The JDBC jar file(s) are supplied by your DBMS vendor,		
✓ Choose Java Virtual Machine	the target Omnigen Host machine, and enter the location of the	JDBC jar files below.	
✓ Specify Base Port Number			
Specify Hostname and Domain			
 Configure OmniGen Repository Tomcat Ports 	Enter the location of the JDBC jar file(s).		
 Specify Location of OmniGen Designer 	C:\jdbcjars		
✓ Specify Location of Source Control .jar Files			
✓ Select Source Code Control System and Locati		Restore Default Folder	Choose
Specify Location of JDBC .jar Files			
Configure OmniGen Server Databases			
Verify the OmniGen Master Database URL			
Select the Data Quality DB's DBMS type			
Enter Data Quality Database Connection Para			
Verify the Data Quality Database URL			
Select the OmniGen Server Runtime Protocol			
Verify the OmniGen Server Port Numbers			
Install Controller as a Windows Service			
Choose Elasticsearch Location			
Verify the OmniGen Governance Console's To			
Configure OGC Email Server			
Preserve or Create New WSO2 Repository			
 Verify the WSO2 parameters 			
Enter WSO2 Certificate Parameters			
InstallAnywhere			
Cancel		Previous	Next

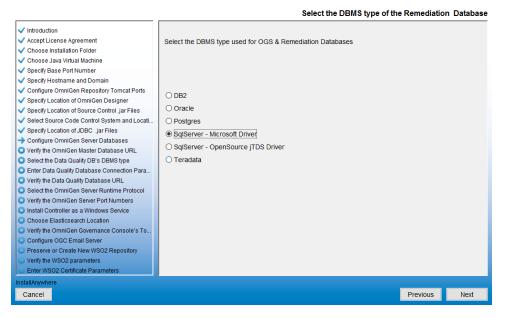
17. Specify the location of your JDBC .jar files, and then click Next.

The Configure OmniGen Server Databases dialog box opens, which provides an overview regarding Omni-Gen databases and configuration parameters, as shown in the following image.



18. Review this information, and then click Next.

The Select the DBMS type of the Remediation Database dialog box opens, as shown in the following image.



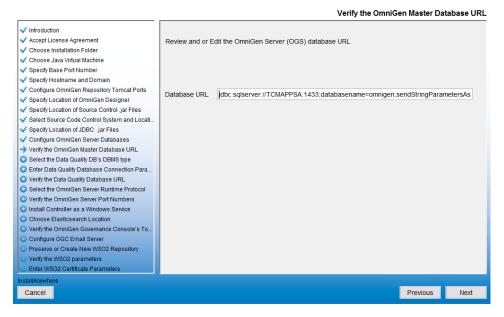
- 19. Specify the database that you want to use for Omni-Gen Server (OGS) and the Remediation database.
- 20. Click Next.

The Enter OGS Database Parameters: SQL Server with Microsoft or Open driver dialog box opens, as shown in the following image.

	Enter OGS Database Parameters: SQL Server with Microsoft or Open driver
 Introduction Accept License Agreement Choose Installation Folder Choose Java Virtual Machine Specify Base Port Number Specify Hostname and Domain Configure OmniGen Repository Torncat Ports Specify Location of OmniGen Designer Specify Location of Source Control System and Locati Specify Location of Source Control System and Locati Specify Location of JBC . jar Files Select Source Code Control System and Locati Specify Location of JBC . jar Files Configure OmniGen Server Databases Verify the Data Quality Database URL Select the Data Quality Database URL Select the OmniGen Server Runtime Protocol Verify the OmniGen Server Port Numbers Install Controller as a Windows Service Choose Elasticsearch Location Verify the OmniGen Governance Console's To Configure OGC Email Server Preserve or Create New WSO2 Repository Verify the WSO2 parameters 	Enter OGS Database Parameters: SQL Server with Microsoft or Open driver Enter the OGS Database Connection Parameters User Name sa Password Password1 Host TCMAPPSA Port 1433 Database Name omnigen Instance
Enter WSO2 Certificate Parameters InstallAnywhere Cancel	Previous Next

21. Specify the DBMS-specific parameters for the combined OGS and Remediation database, and then click *Next*.

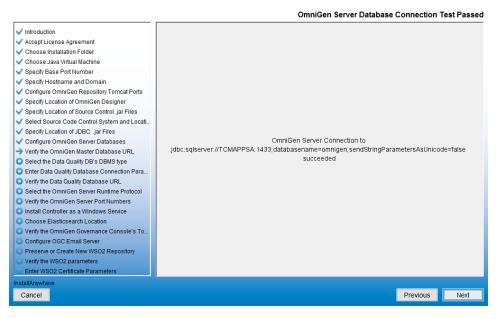
The Verify the OmniGen Master Database URL dialog box opens, as shown in the following image.



22. Verify the database URL and click Next.

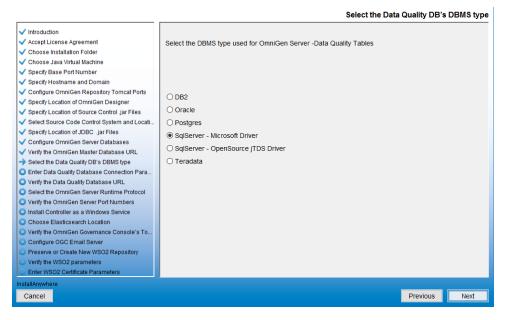
If you receive a message indicating that your connection test failed, verify that your database name exists in SQL (or the DBMS you are using).

When your database exists and the user name, password, and host are correct, the following message appears, indicating that your connection test passed for the specified database.



23. Click Next to continue.

The Select the Data Quality DB's DBMS type dialog box opens, as shown in the following image.



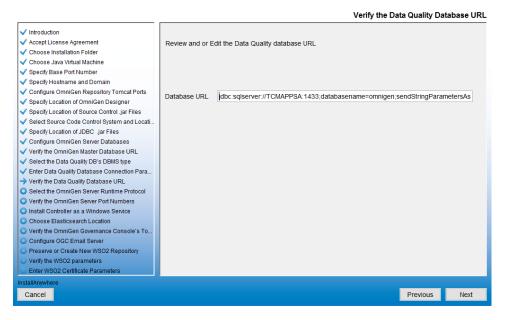
24. Select the DBMS type used for the Data Quality (DQ) database, and then click Next.

The Enter DQ Database Parameters: SQL Server with Microsoft or Open driver dialog box opens, as shown in the following image.

		Enter DQ Database Parameters: SQL Server with Microsoft or Open driver		
✓ Introduction				
Accept License Agreement	Enter the OmniGen Server Data Quality Database Connection Parameters			
Choose Installation Folder		Enter the Onnigen Server Data Quarty Database Connection Parameters		
Choose Java Virtual Machine	If you are using	the same Database for OGS, Remediation, and DQ tables, just Click Next		
✓ Specify Base Port Number				
 Specify Hostname and Domain 				
✓ Configure OmniGen Repository Tomcat Ports	User Name	an		
 Specify Location of OmniGen Designer 	User Name	sa		
✓ Specify Location of Source Control .jar Files	Password	Password1		
 Select Source Code Control System and Locati 				
 Specify Location of JDBC .jar Files 	Host	TCMAPPSA		
✓ Configure OmniGen Server Databases	Port	1433		
✓ Verify the OmniGen Master Database URL	Foit	1455		
 Select the Data Quality DB's DBMS type 	Database Nam	e omnigen		
Enter Data Quality Database Connection Para				
Verify the Data Quality Database URL	Instance			
Select the OmniGen Server Runtime Protocol				
Verify the OmniGen Server Port Numbers				
 Install Controller as a Windows Service 				
Choose Elasticsearch Location				
Verify the OmniGen Governance Console's To				
Configure OGC Email Server				
Preserve or Create New WSO2 Repository				
 Verify the WSO2 parameters 				
Enter WSO2 Certificate Parameters				
InstallAnywhere				
Cancel		Previous Next		

25. If you are using the same database for OGS, click *Next*, or type new parameters for the DQ database, and then click *Next*.

The Verify the Data Quality Database URL dialog box opens, as shown in the following image.



26. Verify the database URL, and then click Next.

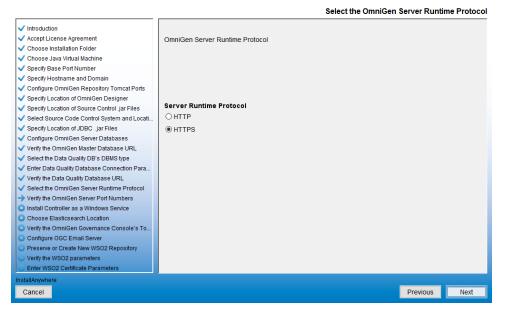
If the test is successful, then the Data Quality Database Connection Test Passed dialog box opens, as shown in the following image.



If the test is not successful, click *Previous* twice, correct the connection parameters, and retest the URL.

27. Click Next.

The Select the OmniGen Server Runtime Protocol dialog box opens, as shown in the following image.



28. Select the desired server runtime protocol, and then click Next.

The Verify the OmniGen Server Port Numbers dialog box opens, as shown in the following image.

		Verify the OmniGen Server Port Numbers - https
✓ Introduction		
Accept License Agreement	Enter the OmniGen Serve	ur norte
Choose Installation Folder	Enter the oninidenderve	n porto
Choose Java Virtual Machine		
Specify Base Port Number		
Specify Hostname and Domain		
Configure OmniGen Repository Tomcat Ports		
Specify Location of OmniGen Designer		
Specify Location of Source Control .jar Files	Controller Port	9500
 Select Source Code Control System and Locati 		
Specify Location of JDBC .jar Files	Server Port	9514
Configure OmniGen Server Databases	Deployment Tool Server H	ITTPS Port 0502
Verify the OmniGen Master Database URL	Deployment roor server r	9302
Select the Data Quality DB's DBMS type		
Enter Data Quality Database Connection Para		
Verify the Data Quality Database URL		
Select the OmniGen Server Runtime Protocol		
→ Verify the OmniGen Server Port Numbers		
Install Controller as a Windows Service		
Choose Elasticsearch Location		
Verify the OmniGen Governance Console's To		
Configure OGC Email Server		
Preserve or Create New WSO2 Repository		
Verify the WSO2 parameters		
Enter WSO2 Certificate Parameters		
InstallAnywhere		
Cancel		Previous
ouncer		

- 29. Accept the default values, but change them if the infrastructure manager informs you of a conflict and recommends changes to alternate available ports.
- 30. Click Next.

The Install the Controller as a Windows Service dialog box opens, as shown in the following image.



31. Accept the default or modify, as required, and then click Next.

I have been dealed Electric according to Electric according

The Use Included Elasticsearch or Existing one dialog box opens, as shown in the following image.

		Use included Elasticsearch or Existing one
✓ Introduction	OmniGen Server can use its	own, included, Elasticsearch, or an already installed, existing, one.
 Accept License Agreement 		Flashing and included with Own/One Oregon
 Choose Installation Folder 	Answer yes below to use the	e Elasticsearch included with OmniGen Server
 Choose Java Virtual Machine 	Answer No if you wish to use	e an already installed Elasticsearch
 Specify Base Port Number 		
 Specify Hostname and Domain 	Do you want to use the Elast	ticsearch included with OmniGen Server?
 Configure OmniGen Repository Tomcat Ports 		
 Specify Location of OmniGen Designer 	() Yes	
 Specify Location of Source Control .jar Files 	0	
✓ Select Source Code Control System and Locati	Elastic search http port	9522
 Specify Location of JDBC .jar Files 	Elastic search api port	9523
✓ Configure OmniGen Server Databases	Elastic search api port	3020
Verify the OmniGen Master Database URL	O No	
 Select the Data Quality DB's DBMS type 		
✓ Enter Data Quality Database Connection Para		
✓ Verify the Data Quality Database URL		
✓ Select the OmniGen Server Runtime Protocol		
Verify the OmniGen Server Port Numbers		
 Install Controller as a Windows Service 		
-> Choose Elasticsearch Location		
Verify the OmniGen Governance Console's To		
Configure OGC Email Server		
Preserve or Create New WSO2 Repository		
Verify the WSO2 parameters		
Enter WSO2 Certificate Parameters		
InstallAnywhere		
Cancel		Previous Next

32. Accept the default or modify, as required, and then click Next.

The Verify the OmniGen Governance Console's Tomcat Parameters dialog box opens, as shown in the following image.

	Verify the OmniGen Governance Console's Tomcat Parameters
Introduction Accept License Agreement Choose Installation Folder Choose Java Virtual Machine Specify Base Port Number Specify Hostname and Domain Configure OmniGen Repository Torncat Ports Specify Location of Source Control Jar Files Select Source Code Control System and Locati	Enter the Omni Governance Console Tomcat information Hostname TCMAPPSA ibi.com HTTP Port 9501
Specify Location of JDBC. jar Files Configure OmniGen Server Databases Verify the OmniGen Master Database URL Select the Data Quality DB's DBMS type Enter Data Quality Database Connection Para Verify the Data Quality Database URL	HTTPS Port 9526 Ajp Port 9525 Shutdown Port 9524 Admin User admin
Select the OmniGen Server Runtime Protocol Verify the OmniGen Server Port Numbers Install Controller as a Windows Service Choose Elasticsearch Location Verify the OmniGen Governance Console's To Configure OGC Email Server Preserve or Create New WSO2 Repository Verify the WSO2 parameters Enter WSO2 Certificate Parameters	Admin Password admin
InstallAnywhere	
Cancel	Previous Next

The Hostname parameter defaults to the machine on which you are currently installing Omni-Gen.

33. Accept the default values, and then click Next.

The Configure OGC Email Server dialog box opens, as shown in the following image.

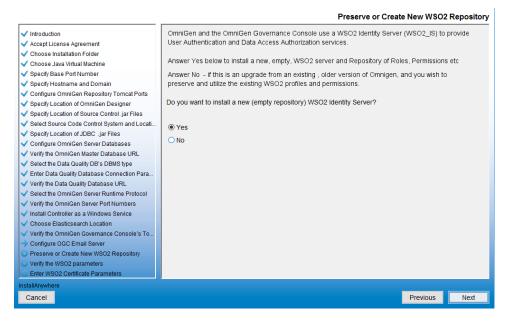
	Configure OGC Email Server
✓ Introduction	
 Accept License Agreement 	OGC's Remediation Service provides optional E-Mail notification of Ticket and Case Reassignments
 Choose Installation Folder 	To enable this service, your installation's SMTP Server must be configured to transmit these E-Mails.
 Choose Java Virtual Machine 	
 Specify Base Port Number 	If you are not using this optional feature, leave these dialog boxes empty, and simply Click Next
 Specify Hostname and Domain 	
✓ Configure OmniGen Repository Tomcat Ports	
 Specify Location of OmniGen Designer 	Enter SMTP Parameters for OGC E-Mails
 Specify Location of Source Control .jar Files 	
Select Source Code Control System and Locati	SMTP Host
 Specify Location of JDBC .jar Files 	SMTP Port
✓ Configure OmniGen Server Databases	SMIPPOIL
✓ Verify the OmniGen Master Database URL	Email Notification From
 Select the Data Quality DB's DBMS type 	
✓ Enter Data Quality Database Connection Para	SMTP Username
Verify the Data Quality Database URL	SMTP Password
✓ Select the OmniGen Server Runtime Protocol	SMTP Password
Verify the OmniGen Server Port Numbers	SMTP SSL Enabled (true or false)
✓ Install Controller as a Windows Service	
 Choose Elasticsearch Location 	
✓ Verify the OmniGen Governance Console's To	
-> Configure OGC Email Server	
Preserve or Create New WSO2 Repository	
Verify the WSO2 parameters	
Enter WSO2 Certificate Parameters	
InstallAnywhere	
Cancel	Previous Next

- 34. Unless you are adding the email option, leave the parameter values blank, click *Next*, and proceed to the Preserve or Create New WSO2 Repository pane in the installer (skip to Step 36).
- 35. To enable the email option, provide values for the following parameters as they apply to your SMTP, email server:
 - **SMTP Host.** Host name of your SMTP server (for example, *smtp.ibi.com*).
 - **SMTP Port.** SMTP port on that server (usually port 25).
 - **Email Notification From.** Email address from which the Assignment emails will originate (for example, *OmniGen_Remediation@ibi.com*).
 - **SMTP Username**. User name for accessing the email server.
 - SMTP Password. Password associated with the user name for accessing the email server.
 - SMTP SSL Enabled (true or false). Specify *true* if your email server supports or requires SSL authentication.

In addition, each user who will receive email notifications must have a valid email address in their WSO2 user profile.

- Each LDAP user with the Data Steward or Data Supervisor role, and who will receive Assignment emails, must have a valid email address in their Active Directory profile. When it makes the LDAP connection, WSO2 will bring back those email addresses to its Local User Store profile of the user.
- Each hardcoded user in the WSO2 *Primary* domain must have an email in their WSO2 user profile.

Following the Configure OGC Email Server dialog box, the Preserve or Create New WSO2 Repository dialog box opens, as shown in the following image.



36. For new Omni-Gen installations, ensure that Yes is selected, and then click Next.

The Verify the WSO2 parameters dialog box opens, as shown in the following image.

		Verify the WSO2 para	meters
Introduction Accept License Agreement Choose Installation Folder Choose Java Virtual Machine Specify Base Port Number Specify Hostname and Domain Configure OmniGen Repository Torneat Ports Specify Location of Source Control jar Files Select Source Code Control System and Locati Specify Location of DBC jar Files Configure OmniGen Repositor Torneat Ports Select Source Code Control System and Locati Specify Location of DBC jar Files Configure OmniGen Repository Torneat Ports Select Source Code Control System and Locati Specify Location of JDBC jar Files Configure OmniGen Server Databases Verify the OmniGen Master Database URL Select the Data Quality DB's DBMS type Enter Data Quality DB's DBMS type Select the OmniGen Server Pont Numbers Install Controller as a Windows Service Choose Elasticsearch Location Verify the OmniGen Governance Console's To Configure OCE Email Server Preserve or Create New WSO2 Repository Verify the WSO2 parameters Enter WSO2 Centificate Parameters	parameters at	Verify the WSO2 para ystem administrator instructs you otherwise, leave these standard WSO2 location t the default values, and Click Next SO2 connection parameters TCMAPPSA.ibi.com 9503	
InstallAnywhere Cancel		Previous	Vext

37. Confirm the WSO2 parameters, and then click Next.

The Enter WSO2 Certificate Parameters dialog box opens, as shown in the following image.

	Enter WSO2 Certificate Parameters
✓ Introduction	This installer uses java keytool to generate and store a security certificate in a WSO2 keystore. The
 Accept License Agreement 	certificate is used to provide security between OGC and the WSO2 Identity Server
 Choose Installation Folder 	The parameters below are used in the creation of a "Self Generated" Certificate.
 Choose Java Virtual Machine 	The certificate can be replaced with a certificate from a commercial Certificate issuing Agency.
 Specify Base Port Number 	The certificate can be replaced with a certificate from a commercial certificate issuing Agency.
 Specify Hostname and Domain 	Leave the value for address of your host, as it has been garnered from information already supplied
 Configure OmniGen Repository Tomcat Ports 	earlier in this Installer Q&A session.
 Specify Location of OmniGen Designer 	
 Specify Location of Source Control .jar Files 	Supply values for the remaining 5 questions.
 Select Source Code Control System and Locati 	
 Specify Location of JDBC _jar Files 	Enter the parameters required by the Java keytool
 Configure OmniGen Server Databases 	
 Verify the OmniGen Master Database URL 	What is the address of your host? TCMAPPSA.ibi.com
 Select the Data Quality DB's DBMS type 	
 Enter Data Quality Database Connection Para 	What is the name of your organizational unit?
 Verify the Data Quality Database URL 	What is the name of your organization?
 Select the OmniGen Server Runtime Protocol 	
 Verify the OmniGen Server Port Numbers 	What is the name of your city or locality?
 Install Controller as a Windows Service 	
 Choose Elasticsearch Location 	What is the name of your state or province?
✓ Verify the OmniGen Governance Console's To	What is the two-letter country code for this unit?
 Configure OGC Email Server 	
 Preserve or Create New WSO2 Repository 	
 Verify the WSO2 parameters 	
Enter WSO2 Certificate Parameters	
InstallAnywhere	
Cancel	Previous Next

38. Collect the parameters to generate the certificate for WSO2.

The parameters are used to build a unique certificate to secure the Omni Governance Console to the WSO2 communication.

39. Ensure that the address of your host is correct (not *localhost*), and then type values for the other parameters. For example:

	Enter WSO2 Certificate Parameters
 Introduction Accept License Agreement 	This installer uses java keytool to generate and store a security certificate in a WSO2 keystore. The certificate is used to provide security between OGC and the WSO2 Identity Server
 Choose Installation Folder 	The parameters below are used in the creation of a "Self Generated" Certificate.
 Choose Java Virtual Machine 	The certificate can be replaced with a certificate from a commercial Certificate issuing Agency.
 Specify Base Port Number 	The cerunicate can be replaced with a cerunicate from a commercial Cerunicate issuing Agency.
 Specify Hostname and Domain 	Leave the value for address of your host, as it has been garnered from information already supplied
 Configure OmniGen Repository Tomcat Ports 	earlier in this Installer Q&A session.
 Specify Location of OmniGen Designer 	
 Specify Location of Source Control .jar Files 	Supply values for the remaining 5 questions.
 Select Source Code Control System and Locati 	
 Specify Location of JDBC .jar Files 	Enter the parameters required by the Java keytool
 Configure OmniGen Server Databases 	
 Verify the OmniGen Master Database URL 	What is the address of your host? TCMAPPSA.ibi.com
 Select the Data Quality DB's DBMS type 	
 Enter Data Quality Database Connection Para 	What is the name of your organizational unit? iway
 Verify the Data Quality Database URL 	What is the name of your organization? ibi
 Select the OmniGen Server Runtime Protocol 	
 Verify the OmniGen Server Port Numbers 	What is the name of your city or locality? ny
 Install Controller as a Windows Service 	
 Choose Elasticsearch Location 	What is the name of your state or province? ny
Verify the OmniGen Governance Console's To	What is the two-letter country code for this unit? US
 Configure OGC Email Server 	
 Preserve or Create New WSO2 Repository 	
 Verify the WSO2 parameters 	
Enter WSO2 Certificate Parameters	
InstallAnywhere	
Cancel	Previous Next

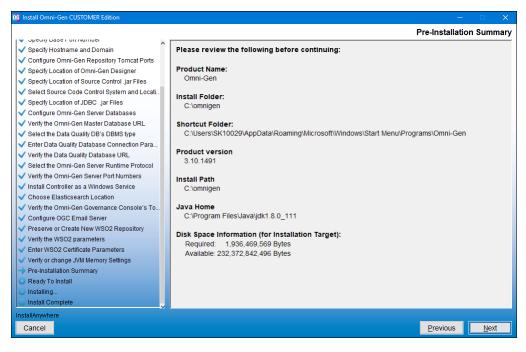
40. Click Next.

The Verify or change JVM Memory Settings dialog box opens, as shown in the following image.

		Verify or change JVM Memory Settings
Introduction Accept License Agreement Choose Installation Folder Choose Java Virtual Machine Specify Base Port Number	system administrator and-c these values as the default	
 Specify Hostname and Domain Configure OmniGen Repository Tomcat Ports Configure I continue of Control C	Verify and or edit the JVM I Controller Max Memory	1024M
 Specify Location of OmniGen Designer Specify Location of Source Control .jar Files Select Source Code Control System and Locati 	Console Max Memory	1024M
Specify Location of JDBC jar Files Configure OmniGen Server Databases Verify the OmniGen Master Database URL	OmniServer Max Memory Command Line Max Memor	1024M 1024M
✓ Select the Data Quality DB's DBMS type ✓ Enter Data Quality Database Connection Para ✓ Verify the Data Quality Database URL	DQ Cleansing Max Memory	1024M
Verify the Data Guality Database OKL Select the OmniGen Server Runtime Protocol Verify the OmniGen Server Port Numbers	DQ Merging Max Memory	1024M
Install Controller as a Windows Service Choose Elasticsearch Location Verify the OmniGen Governance Console's To	DQ Remediation Max Memory Elastic Search Max Memory	
Configure OGC Email Server Preserve or Create New WSO2 Repository		
Verify the WSO2 parameters Enter WSO2 Certificate Parameters		
InstallAnywhere Cancel		Previous Next

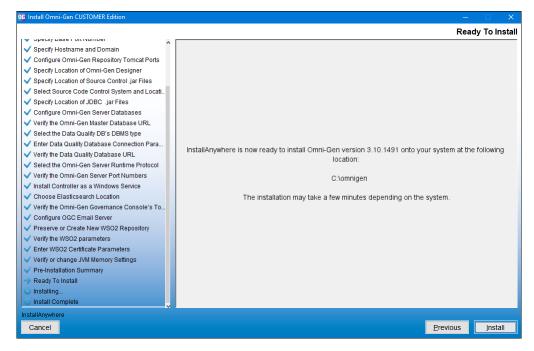
41. Change the values only if you are instructed by Information Builders or iWay Support analysts, otherwise, click *Next*.

The Pre-Installation Summary dialog box opens, as shown in the following image.



42. Review all of the settings in the Pre-Installation Summary pane, and then click Next.

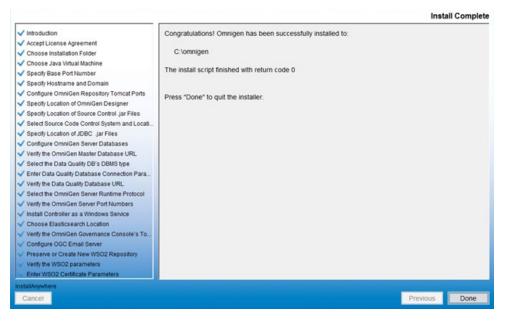
The Ready To Install dialog box opens, indicating that the configuration for installation is complete, as shown in the following image.



43. Click Install to proceed with installation.

Progress of the Omni-Gen Customer Edition installation is shown.

The Omni-Gen installation is complete when the Install Complete dialog box displays, as shown in the following image.



44. Press Done to exit the Omni-Gen installer.

You are now ready to configure Omni-GenTM for Customer. For more information, see *Configuring Omni-Gen*TM for *Customer* on page 53.



Configuring Omni-Gen[™] for Customer

This section describes how to configure Omni-Gen[™] for Customer.

In this chapter:

□ Configuring Omni-Gen[™] for Customer

Configuring Omni-Gen[™] for Customer

This section describes how to configure Omni-Gen[™] for Customer to quickly get started with using the product. For more information on detailed use of the related product areas, see the corresponding documentation for Omni-Gen[™] Master Data Management (MDM) and Data Quality (DQ) Editions.

Note: Omni-Gen services can be managed from a command line prompt that has been launched using the *Run as Administrator* option or from the Omni Console. Using the Omni Console to manage Omni-Gen services is highly recommended. However, during certain points of the configuration process, Omni-Gen services must be managed (for example, started or stopped) from a command line prompt. In addition, during the configuration process, specific Omni-Gen services must be running (started) while other services are stopped. Please follow the management of Omni-Gen services (for example, starting and stopping) as described in this documentation.

1. Open a command line prompt window using the Run as Administrator option.

The omni start-xx and omni stop-xx commands are accessible from the following folder:

<omni_install>\omnigen\OmniServer

2. Change your current directory to \OmniServer as follows:

cd <omni_install>\omnigen\OmniServer

3. Execute the following command:

omni start-controller

Note: The controller will take a minute or two to start as it has to initialize the underlying components. It is recommended to start the controller only for the development environment, instead of all of the services using the omni start-all command.

4. Use a browser to login to the Omni Console, which can be accessed using the following default URL:

```
https://host.domain:9500/
```

Where the *host* is the host of your machine and the *domain* is the domain for your machine. The default user ID and password is *ibi / ibi*.

5. Start all of the services if they were not started already. You can start each service one at a time to give them time to start.

mniConsole ≡	✿ Managed Services	
	Start All Stop All D Restart All	
 c° Services ✓ Configuration ▼ © Deployment 	Data Processing Omni Server	OFF ON
III Processing -	Data Quality Cleansing	OFF ON
* Testing ()	Matching	OFF ON
Consoles	Remediation	OFF ON
	Workbench Cleansing Omni Services	OFF ON
	Designer Repository	OFF ON
	Deployment Bundler OGC Services	OFF ON
	OGC Tomcat	C Starting
	WS02	OFF ON
	Elastic Index	OFF ON

Note: Since there is no bundle currently deployed, you are not able to start the service for Omni Server (under Data Processing) and the five services listed under Data Quality. These services will be started after a deployed bundle is available.

6. Open Omni Designer by navigating to C:\omnigen\OmniDesigner and executing OmniDesigner.exe.

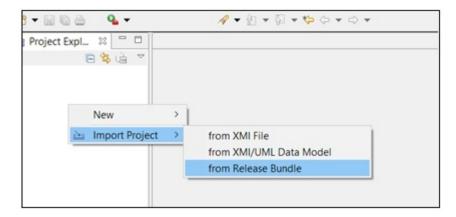
7. Create a new repository.

II Omni Designer -				-		×
File Edit Navigate Search Project F	Run Window He	lp				
	A • 2 • 5	* \$\$ \$\$ * \$\$ *	Quick Access	1 0 0	mni De	signer
18 Project Expl 🕴 🗖 🗌				·		
E 🕸 🔓 🔻	Add the Des	igner Repository Service	• ×			
		oository Service Details er Repository Service details.				
	Name:	local				
	Protocol :	http	~			
	Host	localhost				
	Path:	com.iwaysoftware.omni.designer.reposito	ryservice			
	Port :	8888				
Designer Re 121 C Properties	(2)	Add Service	Cancel		7	

Simply provide a repository name and keep default values for the remaining parameters.

- 8. Connect to your repository using the credentials super / super.
- 9. Import the project that contains the Customer Model and required artifacts into Omni Designer.

Right-click in the Project Explorer area, select *Import Project*, and then click *from Release Bundle*, as shown in the following image.



10.Select your local repository into which the project will be imported. Browse to the Customer project located in:

C:\omnigen\OmniGenData\OmniCustomer\OmniGenForCustomer.zip

11.Provide a project name (for example, Customer) and then click *Finish*, as shown in the following image.

Omni Desigr	ner Project			×
Import Omni [Designer Project			
In case a licer not be import	nse of the Project Bundle differs from the current license, some artifacts wi ed.	II		
Project name:	Customer			
Description:	Customer project			^
				~
(?)	Finish		Cance	el

Please wait a minute until the system loads all of the artifacts.

After the project is imported, you will see the model load and can review it, as shown in the following image.

3-866 9		🛷 🕶 🖞 👻 💱	$(\phi + \phi) +$	Quick Access 🔡 🥵 Omni 🛙	Design	er
Project Expl 🛛 🗖 🗖	🖧 Input Data	Models 🕸			-	
🖻 😫 🝙 🔻	♦ Create ¥	Delete 🕆 Move Up	& Move Down & Reset sorting	Update Content Types		
- 🛃 Customer v.0 [trunk]	Name		Data Types	Description		
 Solution Input Data Models 	1 Email		String	Email Address		-
> 🖧 Customer			String	Company Legal Form		
> 🥘 Reference Data Moc	3 Country		String	Country		
> @ Remediation Rules	4 DateAsSt		String	Date (as string)		
	5 Phone		Integer, Long, String	Phone Number		
	6 USAState		String	USA State		
	7 SSN S		String, Long, Integer	Social Security Number		
			String, Date, Datetime	Date of Birth		
	<					>
>	Content Types					_
Designer Re 🛙 🗖 🗖	Properties	🛙 🔝 Problems 🕙 E	rror Log 🙀 Data Source Explorer	d	⊽ □	
÷ 6	General	Name	Email			^
Iocal	Data Types	Name:	Email			
	Data types	Short Description:	Email Address	ess		
					^	
		Long Description:				

If any changes are made to this project, right-click the *Customer* project and select *Commit*, as shown in the following image.

ile Edit Navigat	e Se		Run Window Help	•• · · · · ·			
Project Expl 2	-			₩ ₩₩₩		Quick Access	gner
	-					🖑 Update Content Types	-
Customer v.0	ftn ink	1 Create	A Delete U Move (1	wn e. Reset sorong		
v 🖧 Input Data		Commit		Data Types		Description	 _
> A Custom	1	Update	Alt+U	String		Email Address	
> Reference		Update To Versio	n	String		Company Legal Form	
> @ Remediativ	M	Undo	Ctrl+Z	String		Country	
> 🐨 Kemediati		Redo	Ctrl+Y	String		Date (as string)	
Revert All Op	TIEBE		Integer, Long,	String	Phone Number		
			String		USA State		
	Show History		String, Long, I		Social Security Number		
		Delete Other	Delete >	String, Date, D	latetime	Date of Birth	
		Import Project Export Project	>				
		Close Project					
	1	Generate Project	Bundle				
		DQ Project	>				
	P	Manage Source :	Systems				
Designer Re_ 🛛 🕾 Properties F3		Error Log 🙀 D	ata Source Explorer				
🚱 🔒		General	Property		Value		
			 Associated DQ Pro 	oject info			
			Name		Customer		
			Version		107625		
			✓ Info				
			Description		Customer project		

Note: The Commit option is available only if the project has been updated.

This will commit changes to the source management system.

You can now generate a project bundle for deployment.

12.Right-click the *Customer* project and select *Generate Project Bundle*, as shown in the following image.

🔋 Project Expl 🕺	🗖 🗖 💑 Input Data Models 🛙	
E 😫	🖮 🍸 🗣 Create 🕱 Delete 🗘 M	ove Up 将 Move Dowr
 Customer v.1 [tr Input Data N Reference Data Reference Data Remediation 	Commit Update 4 Update To Version Undo C	Alt+U tring trl+Z trl+Y tring trl, Long, St tring trin
	X Delete D Other	elete tring, Date, Date
	Import Project Export Project Close Project	>
	Generate Project Bundle DQ Project	>
< Designer Re 🛙	 Manage Source Systems Properties 	F3 ror Log 🙀 Dat

13. Provide a description (optional) and select the proper bundle versioning.

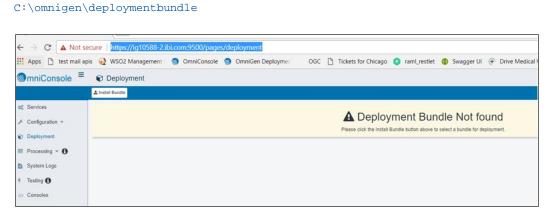
Please wait a minute for the project bundle to generate.

14.Once this process has finished, close Omni Designer and navigate to http://localhost:8090/ to create the deployable project bundle.

This process gathers all of the artifacts for DQ, Remediation, Model, OGC, and others, and packages them for deployment into runtime. A deployable project bundle is written to disk as a .zip file.

OmniGen Deployment C ×					θ - α	X
← → C O localhost:8090					Q ★ 6 🜻	
🛗 Apps 🗋 test mail apis 🧕 WSO2 Management	OmniConsole S OmniGen Deploymer	OGC 🗋 Tickets for Chicago 🧯 raml_restlet 🌘	Swagger UI 💮 Drive Medical Ultra	U DE LE MARAIS - Tiered S	Sliding Door Showro	
🍘 OmniConsole	Project Bundles					
Project Bundles						
	Project Name	Project Id	Notes	Number	Created	
	Customer	_v3RXIOdCEeeyoYMGIDpSgQ		1.0.0.Alpha.0	Dec 22, 2017 1:21:14 PM	

- 15.Click the green run icon to generate a deployment bundle.
- 16.Return to the Omni Console at https://host.domain:9500/pages/deployment, where you are taken directly to the Deployment page.
- 17.Click *Install Bundle* and browse to the project bundle that you recently generated, which is located in the following directory by default:



Please wait a minute to install as the system must load all of the artifacts and establish all of the repositories.

You will see the deployment steps as they are being executed, as shown in the following image.

Copy OmniGenModel jar	Complete	2017-12-22 18:27:03.198	5.441	
Start DQM Service	Complete	2017-12-22 18:27:08.654	8.721	
Close Workbench sessions	Complete	2017-12-22 18:27:18.255	0.062	
Finish Workbench maintenance	Complete	2017-12-22 18:27:18.333	0.047	
Start Workbench maintenance	Complete	2017-12-22 18:27:38.519	0.063	
Terminate Workbench jobs	Complete	2017-12-22 18:27:38.582	0.047	
nitializing databases	Complete	2017-12-22 18:27:39.942	0.016	
Drop Model Tables	Complete	2017-12-22 18:27:39.974	5.516	
Drop Ramp Tables	Complete	2017-12-22 18:27:45.506	1.531	
Drop Source Tables	Complete	2017-12-22 18:27:47.052	1.439	
Drop Mastering Tables	Complete	2017-12-22 18:27:48.522	1.453	
Delete database changelogs	Complete	2017-12-22 18:27:49.991	0.062	
Execute Custom preDeployment Migration Tasks	Complete	2017-12-22 18:27:50.069	0.109	
Execute OmniGen preDeployment Migration Tasks	Complete	2017-12-22 18:27:50.178	0.102	
Jpdate Model Tables	Complete	2017-12-22 18:27:50.286	3.013	
Jpdate Ramp Tables	Complete	2017-12-22 18:27:53.323	8.78	
Update Source Tables	Complete	2017-12-22 18:28:02.119	9.97	

18.Upon completion, the system will be configured for the given domain mastering.

mniConsole ≡	Deployment			A ⁰	0	4
	▲ Replace Bundle C Update Bundle O Reset Environment					
The bundle was successfully in	stalled.					×
🖌 Configuration 👻	Project Name	Customer				1
Deployment	Created By	IBI Deployment Bundler				
Processing	Created Date	12/22/17 1:21 PM				
	Release Number	1.0.0.Alpha.0				
System Logs	Version	Customer_1_0_0_Alpha_0_171222132300				
* Testing ()	Installed Date	2017-12-22 18:27:01.560				
Consoles	Release Notes					
	Subjects				_	
	Name		Cleansed	Mastered	1	
	E - Customer		true	true		
			false	false		
	≡ - SourceCodeSet		false	false		
	SourceCodeStandard		false	false		

Now it is time to start the services.

19.Navigate to Services and start all of the remaining services for data processing.

After all of the services up and running, the system is ready for data load, processing, and data access.

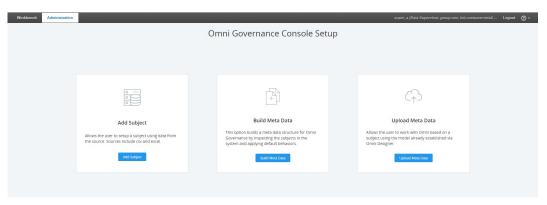
Loading Metadata (MData) Using the Omni Governance Console

1. Access the Omni Governance Console (OGC) by using the following URL:

```
http://localhost:9090/ogc/
```

Login with your credentials based on your policy access. The default credentials are:

- User name: super_a
- Password: supera123
- 2. In the Administration tab, click *Upload Meta Data* on the Omni Governance Console Setup screen to load the predefined set of metadata, which defines the layout of the screens in OGC.

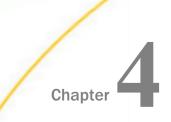


Note: You can customize this view and you can also export or import the definition for sharing. The Mdata file is located in the following directory:

C:\omnigen\OmniGenData\mdata

3. Once the MData is loaded, you can navigate the various console components. If you had loaded sample data, then you would see this data populated throughout the console. Otherwise, you will see only column layouts with no data, as shown in the following image.

	, 30/ogc/domain/view/_87 WS02 Management 👩 OmniCo	nsole 🍵 OmniGen Deployme	OGC	Tickets for Chicago 🧿 raml_m	stlet 🌘 Swapper UI 🛞 Drive Me	tical Ultra L		©, ☆ 6 or Showro	• •
360 Viewer Re	mediation Workbend	h Administration			super_a (Data Superviso	r, group.one, System Admii	nistrator) I	Logout (@ -
360Viewer	CustomerMas	tor • Advanced Sea	rch						
CustomerMaster 🔘								Linking	
Showing 0 of 0 records.	Number of records per pag	20 •						-44 -4	b 10
ld	First Name	Last Name	٥	Gender 0	Date Of Birth 0	Full Name 0	Issues	Acti	ions
					() () () () () () () () () ()				
No data available in tabl	le								
Showing 0 of 0 records.	Number of records per pag	0 20 •						41.4	1- 10-



Understanding the Omni-Gen[™] for Customer Data Model

This section provides reference information for the Omni-GenTM for Customer data model.

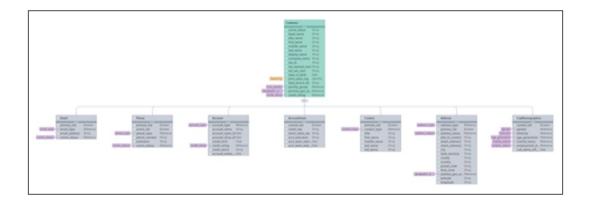
In this chapter:

- □ Understanding the Omni-Gen[™] Customer Data Model
- Data Quality Rules

Understanding the Omni-Gen[™] Customer Data Model

The Omni-Gen[™] for Customer data model includes the following subjects:

- Customer
- Address
- SalesOrder
- SalesOrderLine
- Phone
- Email
- Account
- AccountTeam
- □ Contact
- CustDemographics
- Item
- SalesOrg



Customer

The **Customer** subject identifies basic master data about customers, such as name, date of birth, and tax identification number (TIN) / Social Security Number (SSN).

The data on the **SalesOrder** and **SalesOrderLine** can be used as the basis for calculating metrics for year to date comparisons between perfect order, on-time delivery, and fill rate percentages. Selected demographics from the **CustDemographics** subject can also be used to further enrich the calculation and metrics, such as sales by product group by ethnicity, returns by age generation, or product group upsell by marital status.

Name	Data Type	Reference Table	Description
active_status	String		A Y/N indicator identifying whether the customer is active.
legal_name	String		The legal name used by a customer.
dba_name	String		The <i>doing business as</i> name used by a customer.
first_name	String		The first name for a customer.

Customer subject attributes include:

Name	Data Type	Reference Table	Description
middle_name	String		The middle name for a customer.
last_name	String		The last name for a customer.
display_name	String		The textual name that appears for a customer.
company_name	String		The company name used by a customer.
tax_id	String		The tax identification number for a customer.
tax_exempt_num	String		The tax exemption number for a customer.
soc_sec_num	String		The social security number for a customer.
date_of_birth	Date		The date of birth for a customer.
prim_sales_org	Identifier	SalesOrg	The primary sales organization assigned to a customer.
lead_source_txt	String		The original source of information on a customer.
priority_group	Reference	Customer Priority Types	The priority of a customer. For example, customers in a high priority may have their orders expedited ahead of other lower priority customers.

Name	Data Type	Reference Table	Description
primary_geo_area	Reference	Geographic Area Types	The primary geographic area (for example, region, branch, store, or sales region) assigned to a customer.
credit_rating	Reference	Credit Rating Types	The overall credit rating assigned to a customer.

Address

The **Address** subject identifies address data including address type, time zone and geographic area. The geographic area can represent a company's division, branch, department, or other geographical grouping used for reporting purposes.

Address subject attributes include:

Name	Data Type	Reference Table	Description
address_type	Reference	Address Type	The primary type of use for an address such as corporate, sold to, ship to, or bill to.
primary_ind	String		A Y/N indicator identifying the primary address for the customer.
address_status	Reference	Address Status	The current status for an address.
attn_to_contact	String		The contact name to include in the <i>Attention To</i> portion of the address.
street_address1	String		The first line of the street, house, building, or parcel portion of an address.
street_address2	String		The second line of the street, house, building, or parcel portion of an address.

Name	Data Type	Reference Table	Description
city	String		The city portion of an address.
state_territory	String		The state or territory portion of an address.
county	String		The county portion of an address.
country	String		The country portion of the address.
postal_code	String		The zip or postal code portion of an address.
time_zone	String		The time zone in which the address is located.
address_geo_are a	Reference	Geographic Area Types	The geographic area (for example, branch, store, region, or sales area) associated to an address.
latitude	Float		The geospatial latitude for an address.
longitude	Float		The geospatial longitude for an address.

SalesOrder

The **SalesOrder** subject identifies general master data about the sales order, such as the ordering customer, sales order date, and order priority. Several attributes are available for comparative reporting such as requested ship to address, ship date, or ordered quantity compared to the actual ship date, ship to address, or shipped quantities. Metrics can be computed with the available data on this subject and the **SalesOrderLine** subject, such as for the order fill or return rates.

SalesOrder subject attributes include:

Name	Data Type	Reference Table	Description
ord_cust_id	ldentifier	Customer	The unique identifier for the ordering customer on the sales order.
sales_order_dt	Date		The date the sales order was placed.
sales_order_typ e	Reference	Order Types	The type of sales order, such as blanket, standing, or standard.
req_st_street	String		The customer requested ship to street address.
req_st_city	String		The customer requested ship to city.
req_st state	String		The customer requested ship to state/territory.
req_st_zip	String		The customer requested ship to zip/postal code.
req_st_country	String		The customer requested ship to country.
act_st_street	String		The actual ship to street address used for shipment of goods from a sales order.
act_st_city	String		The actual ship to city used for shipment of goods from a sales order.
act_st_state	String		The actual ship to state/territory used for shipment of goods from a sales order.
act_st_zip	String		The actual ship to zip/postal code used for shipment of goods from a sales order.

Name	Data Type	Reference Table	Description
act_st_country	String		The actual ship to country used for shipment of goods from a sales order.
req_ship_dt	Date		The requested ship date of a customer.
cmt_ship_dt	Date		The ship date committed to by the sales order goods provider.
act_ship_dt	Date		The actual date that goods shipped for the sales order.
req_delivery_dt	Date		The requested delivery date of the customer.
cmt_delivery_dt	Date		The committed delivery date for a sales order.
act_delivery_dt	Date		The actual delivery date for the sales order.
order_priority	Reference	Order Priority Types	The priority set to an order such as Top 10, Expedite, Normal, or Low.
order_status	Reference	Order Status	The status of the sales order. For example, it may be partially shipped and still have a few line items in backorder.
sold_sales_org	ldentifier	SalesOrg	The sales organization that will receive credit for the sales order.

SalesOrderLine

The **SalesOrderLine** subject identifies general data about the lines on a sales order, such as item quantity. Several attributes are available for comparative reporting, such as requested item, quantities, or delivery dates compared to the actual delivered item, quantities, or delivery date. Metrics can be computed with the available data on this subject and the **SalesOrderLine** subject, such as for the sales order line fill or return rates.

Name	Data Type	Reference Table	Description
requested_item_i d	Identifier	ltem	The product requested on a sales order line.
requested_item_ qty	Integer		The requested quantity of a product.
committed_item_i d	ldentifier	ltem	The product committed to be provided for a sales order line. This can differ from the requested product.
committed_item_ qty	Integer		The committed quantity of a product.
requested_deliver y_dt	Date		The date requested for delivery.
committed_delive ry_dt	Date		The committed date for delivery.
actual_delivery_dt	Date		The actual date of the delivery.
delivered_item_id	Identifier	ltem	The product actually delivered on a sales order line. This can differ from the committed product.
delivered_item_qt y	Integer		The delivered quantity of a product.
returned_item_id	Identifier	Item	Any returned product applied against this line item. Dependent on the return process, this product may differ from the delivered product.
returned_item_qt y	Integer		The returned quantity of a product.

SalesOrderLine subject attributes include:

Name	Data Type	Reference Table	Description
sales_order_ln_u om	Reference	Unit of Measure	The unit of measure for quantities on the sales order line.
unit_pri_amt	Float		The unit price expected for the requested product.
invoiced_unit_pri_ amt	Float		The invoiced unit price amount.
paid_unit_amt	Float		The amount actually paid per unit for an item.
r_sales_org_id	Identifier	SalesOrg	The sales organization responsible for the sales order line.
sales_order_ln_dt	Date		The creation date for a sales order line.
order_In_status	Reference	Order Line Status	The status of the sales order line such as pending, partially shipped, backorder or closed.

Phone

The **Phone** subject identifies the phone numbers for the customer such as home, office, FAX or mobile.

Phone attributes include:

Name	Data Type	Reference Table	Description
primary_ind	Boolean		A Y/N flag indicating if this is the primary phone number for a customer.
active_ind	Boolean		A Y/N flag identifying whether a phone number is active.

Name	Data Type	Reference Table	Description
phoneType	Reference	Phone Types	The phone type code for a phone such as home, office, or FAX.
phone_number	String		The set of digits that represents the phone number of the customer.
extension	String		Any appropriate extension for a phone number.
comm_status	Reference	Communication Status	This is the status of the phone number such as unconfirmed, invalid, opt-in, opt-out or unsubscribe.

Email

The **Email** subject identifies the email address for a customer, such as personal or business. **Email** attributes include:

Name	Data Type	Reference Table	Description
primary_ind	Boolean		A Y/N indicator used for identifying the primary email for a customer.
email_type	Reference	Email Types	The email address type for the email of a party, such as home, office, or personal.
email_address	String		The value for the email address of a party.
comm_status	Reference	Communicatio n Status	A Y/N flag indicating is this is the primary email address for a customer.

Account

The **Account** subject identifies the accounts related to a customer.

Account attributes include:

Name	Data Type	Reference Table	Description
account_type	Reference	Account Type	The type of account such as customer or vendor.
account_name	String		The name of an account.
account_open_dt	Date		The date on which the account was opened.
account_close_dt	Date		The date on which the account was closed.
credit_limit	Float		The monetary credit limit for a given account.
credit_rating	Reference	Credit Rating Types	The credit rating assigned to a given account.
credit_terms	String		The credit terms assigned to a given account such as Net 60, COD, Prepaid, or 2/10 Net 30.
account_renew_d t	Date		The next renewal date for an account.

AccountTeam

The **AccountTeam** subject identifies the names of the team assigned to a customer.

AccountTeam subject attributes include:

Name	Data Type	Reference Table	Description
current_ind	String		A Y/N indicator identifying whether the account team is the most current.
credit_rep	String		The name of the assigned credit manager.
direct_sales_rep	String		The name of the assigned direct sales representative.
acct_executive	String		The name of the assigned account executive or manager.
acct_team_start_ dt	Date		The start date for the account team assignment.
acct_team_end_d t	Date		The end date for the account team assignment.

Contact

The **Contact** subject identifies the contacts related to a customer.

Contact subject attributes include:

Name	Data Type	Reference Table	Description
primary_ind	String		A Y/N indicator identifying whether this is the primary contact for a customer.
contact_type	Reference	Contact Types	The primary type assigned to the contact such as buyer, accounts receivable, or delivery receipt.
title	String		The title for the contact such as Dr., Mr., or Mrs.
first_name	String		The first name of the contact.

Name	Data Type	Reference Table	Description
middle_name	String		The middle name of the contact.
last_name	String		The last name of the contact.
full_name	String		The full name of the contact. Usually including the first, middle, and last names.

CustDemographics

The **CustDemographics** subject identifies demographics assigned to a customer.

CustDemographics subject attributes include:

Name	Data Type	Reference Table	Description
current_ind	Boolean		A Y/N indicator identifying whether the customer demographics are currently in effect.
gender	Reference	Gender Types	The gender for a customer.
ethnicity	Reference	Ethnicity Types	The ethnicity for a customer.
age_generation	Reference	Age Generation	The age generation for a customer such as Greatest Generation or Baby Boomer.
marital_status	Reference	Marital Status Types	The marital status for a customer.
employment_stat us	Reference	Employment Status Types	The employment status for a customer.
cust_demo_eff_dt	Date		The effective date for a set of customer demographics.

ltem

The **Item** subject identifies information pertaining to product, services, or equipment.

Name	Data Type	Reference Table	Description
item_name	Boolean		The commonly used name for an item.
item_short_desc	String		The short textual description for an item.
item_long_desc	String		The long textual description for an item.
key_item_ind	String		A Y/N flag identifying whether a product is included in the major products tracked by the company.
item_base_uom	Reference	Unit of Measure	The standard/base unit of measure for an item.
item_base_price	Float		The base price for a base unit of measure for an item.
item_sku	String		The stock keeping unit for an item.
item_barcode	String		The bar code for an item.
item_gtin	String		The global trade item number for an item.
item_eff_dt	Date		The effective date for an item.
item_eol_dt	Date		The end of life date for an item.
item_base_cost	Float		The base cost amount for an item.

Item subject attributes include:

SalesOrg

The **SalesOrg** subject identifies the sales organization of the enterprise.

SalesOrg subject attributes include:

Name	Data Type	Reference Table Description	
sales_org_name	String		The textual name for a sales organization.
sales_org_desc	String	The textual description for a sales organization.	
sales_org_start_d t	Date		The start date for a sales organization.
sales_org_end_dt	String		The end date for a sales organization.
primary_geo_area	Reference	Geographic Area Types	The primary geographic area assigned to a sales organization.

Reference Tables

Omni-Gen[™] for Customer also includes the following reference tables.

These reference tables contain the acceptable list of values for the codes that appear on the Customer and SalesOrder tables.

- **Account Type.** Identifies the possible types of accounts, such as customer or vendor.
- □ Address Status. Identifies the possible status for an address, such as pending, active, or expired.
- Address Types. Identifies the acceptable values for the customer's address type, such as sold to, ship to, bill to, and corporate.
- □ Age Generation. Identifies the acceptable values for the customer's generation as derived from their data of birth, such as Greatest, Silent, Baby Boomer, Gen X, Gen Y, or Gen Z generations.
- □ **Communication Status.** Identifies the status for a given email or phone number, such as unconfirmed, opt-in, opt-out, or unsubscribed.
- □ **Contact Types.** Identifies the primary type for a contact, such as buyer, planner, account payable, or delivery receipt.
- □ Credit Rating Types. Identifies the acceptable values for the customer's credit rating, such as Prime, High, Speculative, Default Imminent, or In Default.

- □ **Customer Priority Types.** Identifies the acceptable values for the customer's assigned priority, such as Top 10, High, Medium, Normal, or Low.
- **Email Types.** Identifies the acceptable values for the customer's email address, such a home, office, or personal.
- **Employment Status Types.** Identifies the acceptable values for the customer's employment status, such as Full time, Part time, Unemployed, or Retired.
- **Ethnicity Types.** Identifies the acceptable values for the customer's ethnicity, such as Asian, Black/African American, Caucasian, Hispanic, or American Indian.
- Geographic Area Types. Identifies the acceptable values for the customer's geographic area or region as derived from their address, such as the Southern, Western, Eastern, or Northern.
- Gender Types. Identifies the acceptable values for the customer's gender, such as Male, Female, Non-binary, or Other.
- □ **Marital Status Types.** Identifies the acceptable values for the customer's marital status, such as Never married, Married, Divorced, Separated, Domestic Partner, or Widowed.
- □ Order Priority Types. Identifies the acceptable values for the customer's order priority, such as Top 10, Customer Expedited, High, Standard, or Low.
- Order Line Status. Identifies the possible status for a line item on a sales or vendor purchase order.
- **Order Status.** Identifies the possible status for a sales or vendor purchase order.
- **Order Types.** Identifies the possible types of sales orders, such as blanket or standing.
- □ **Phone Types.** Identifies the acceptable values for the customer's phone number, such a home, office, FAX, or mobile.
- **Unit of Measure.** Identifies the available units of measure for quantities of an item.

Data Quality Rules

This section provides a reference for the applicable Data Quality (DQ) rules (Cleansing, Matching, Merging, and Remediation).

Cleansing

Names

If name parts are populated, then you can populate full name. If full name is populated, then parse full name to populate name parts.

Requirements

None

Tags

- ERR_NAME_BLANK
- ERR_LAST_NAME_BLANK
- Social Security Number

Standardize SSNs to *xxx-xx-xxxx*. You can tag invalid or questionable values.

Requirements

None

Tags

- ERR_SSN_NO_9_DIGIT
- ERR_SSN_ZEROS_IN_GROUP
- □ ERR_SSN_UNACCEPTED_NUMBER
- ERR_SSN_USED_FOR_ADVERT
- ERR_SSN_BLACKLISTED
- ERR_SSN_ZEROS_ADDED
- ERR_SSN_NOT_A_SSN
- 🖵 Email

Validate email addresses.

Requirements

None

Tags

- ERR_EMAIL_INVALID
- ERR_EMAIL_TLD_MISSING

- ERR_EMAIL_DOMAIN_ONLY
- ERR_EMAIL_AT_SIGN_MISSING
- □ INF_EMAIL_SUSPICIOUS
- □ INF_EMAIL_CLEANSED
- □ ERR_EMAIL_WEB_ADDRESS
- Phone

Validate phone numbers and standardize to (xxx) xxx-xxxx format.

Requirements

None

Tags

- ERR_PHONE_NOT_A_NUMBER
- ERR_PHONE_TOO_SHORT
- □ ERR_PHONE_BLACKLISTED
- ERR_PHONE_AREACODEINVALID
- ERR_PHONE_CO_CODE_INVALID
- Date of Birth

Requirements

None

Tags

- ERR_DOB_BLACKLISTED
- ERR_DOB_IN_FUTURE
- Country

Standardize to the ISO3 country code.

Requirements

None

Tags

- ERR_UNRECOGNIZED
- ERR_AMBIGUOUS
- Address

Cleanse, enhance, standardize, and geocode addresses.

Requirements

Logate for address cleansing and verification

Tags

ERR_ADDRESS_INVALID

Matching

Matching is performed based on the following attributes:

- SSN
- DOB
- Full Name and Name Parts
- eMail
- Phone Number
- Address

Each attribute has a weight assigned, based on the uniqueness of the attribute. Attributes may have reduced weighting where values do not have exact matches or contain transpositions. Attributes unique to the subject may have negative weighting when the values are completely or somewhat different.

It is considered a *Strong* match when the total combined score of the match is greater to or equal 200 and a *Potential* match when greater to or equal to 130 but less than 200.

Records considered as a *Potential* match have a matching ticket created so as to have an individual manually review the low-quality match for accuracy.

Merging

Merging is performed differently based on the subject. The mastered subjects are merged to create a representative view of the entity. The child subjects are sometimes merging the instances to create a representative view of the entity, while other times preserving all records in the subject.

- **Customer**. Instance records are merged to form a single, representative view of the Customer. The most recent, non-blank values are selected.
- **Email**. For each email type, select the non-blank value with the least ERR_, WRN_, or INF_ tags associated.
- □ **Phone**. For each phone type, select the non-blank value with the least ERR_, WRN_, or INF_ tags associated.
- **Account**. All unique account records create golden accounts.
- **Account Team**. All unique account team records create golden account teams.
- **Contact**. All unique contacts create golden contacts.
- **Address**. All unique addresses create golden addresses.
- **CustDemographics**. The customer demographics record with the most complete data create the golden customer demographics.

Remediation

Remediation creates the following two types of tickets:

- □ **Cleansing**. Cleansing tickets are created whenever the tag begins with ERR_. For a complete list of potential tags generated, see *Cleansing* on page 80.
- □ **Matching**. Matching tickets are created when the match quality is only considered to be a *Potential* match. For more information on match quality, see *Matching* on page 83.



Loading Sample Data

This section describes how to load sample data for Omni-Gen[™] for Customer.

In this chapter:

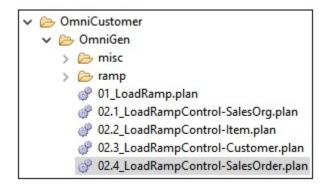
- Accessing the Sample Data
- Create the Database Connection
- Load the Omni-Gen Relational OnRamp Tables

Accessing the Sample Data

After Omni-Gen[™] for Customer is installed, sample data, including Data Quality (DQ) plans that you can edit and run, is available in the following location:

C:\omnigen\OmniGenData\OmniCustomer**OmniGen**

The following image shows the contents of this folder.



Open iWay Data Quality Server (DQS) and verify or change the perspective in the upper-right corner to *iWay DQS*, as shown in the following image.

	_ 0 ×
Quick Access 📑 🙀 Way MDS	約 iWay DQS

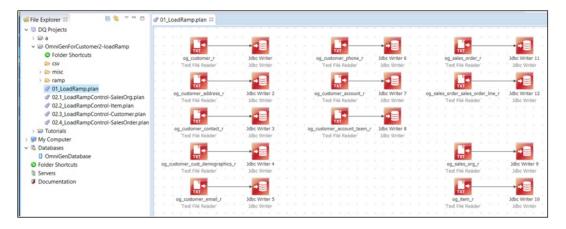
There are two ways you can access the sample data for Omni-Gen[™] for Customer:

1. Using the File Explorer tab.

Simply browse to the following folder in the File Explorer tab:

C:\omnigen\OmniGenData\OmniCustomer\OmniGen

Double-click 01_LoadRamp.plan, which opens the selected plan as a tab in your workspace area, as shown in the following image.



You can modify, save, and run the sample DQ plans as required.

- 2. Importing the \OmniGen folder into your workspace.
 - Right-click *DQ Projects* in the File Explorer tab and select *Import* from the context menu.
 The Import dialog opens.
 - Expand General, select Existing Projects into Workspace, and then click Next.
 The Import Projects pane opens.

- c. Ensure Select root directory is selected and click Browse to the right of this field.
- d. Browse to the following folder:

C:\omnigen\OmniGenData\OmniCustomer\OmniGen

e. Ensure the \OmniGen folder is selected and then click Finish.

The project is loaded as *OmniGenForCustomer-loadRamp*, which contains a subfolder called data, and five DQ plans:

- 01_LoadRamp.plan
- 02.1_LoadRampControl-SalesOrg.plan
- 02.2_LoadRampControl-Item.plan
- 02.3_LoadRampControl-Customer.plan
- 02.4_LoadRampControl-SalesOrder.plan
- f. Double-click 01_LoadRamp.plan, which opens the selected plan as a tab in your workspace area, as shown in the following image.

🕼 File Explorer 😫 📄 🗟 🤝 🗖 🗖	@ 01_LoadRampplan 22
✓ ☺ DQ Projects	
> 🗃 a	
	·····································
 Folder Shortcuts 	og sustomer r Jdbs Writer og sustomer phone r Jdbs Writer 6 og sales order r Jdbs Writer 11
i csv	Text Filé Reåder 3dbc Writer Text Filé Reåder 3dbc Writer Text Filé Reåder 3dbc Writer
> 🗁 misc	
> 🗁 ramp	
O1_LoadRamp.plan	og customer address r Jdbc Writer 2 og customer account r Jdbc Writer 7 og sales order sales order line r Jdbc Writer 12
@ 02.1_LoadRampControl-SalesOrg.plan	Text File Reader' Jdbc Writer Text File Reader' Jdbc Writer Text File Reader' Jdbc Writer
@ 02.2_LoadRampControl-Item.plan	
@ 02.3_LoadRampControl-Customer.plan	
Ø 02.4_LoadRampControl-SalesOrder.plan	og customer contact r Jdbc Writer 3 og customer account team r Jdbc Writer 8
> 🗁 Tutorials	og_cosome_contect
> 💕 My Computer	
 Databases OmniGenDatabase 	n a stal <mark>int</mark> *
Folder Shortcuts	og_customer_cust_demographics_r Jdbc Writer 4 og_sales_org_r Jdbc Writer 9
l Servers	Text Filé Reèder 3dbc Writér Text Filé Reèder 3dbc Writér
Ø Documentation	
	og_customer_email_r Jdbc Writer 5 og_item_r Jdbc Writer 10
	Text Filé Reåder 3dbc Writter Text Filé Reåder 3dbc Writter
	• • • • • • • • • • • • • • • • • • •

You can modify, save, and run the sample DQ plans as required.

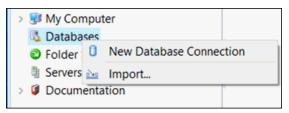
Create the Database Connection

You must now create a database connection, which is used by the Data Quality (DQ) plans.

Note: The database connection you create in iWay DQS must match the database properties that you defined for the combined Omni-Gen Server (OGS) and Remediation database during the Omni-Gen[™] for Customer installation. For example, the database name must match in both areas. To review the installation, see Step 20 in *How to Install Omni-Gen Server and Omni Governance Console on Windows* on page 17.

To create a database connection:

1. Right-click *Databases* and select *New Database Connection* from the context menu, as shown in the following image.



The Edit Database Connection dialog opens, as shown in the following image.

so Edit Data	abase (Conne	ection 🗌 🗆	×
Edit Datab	ase C	onne	ection	
Database typ	pe:	MS S	QL v	Manage_
Connection r	name:	Omr	iGenDatabase	
Connection p	param	eters:		
By fields	5			
Host:			iwmdm1	
Port			1433	
Datab	ase na	me:	OG320serv4-RM	
O By URL				
Conne	ction s	tring:	jdbc:sqlserver://iwmdm1:1433;databaseName=OG320serv4-	RM
Username:	sa			
Password:	••			
Test Connec	tion			
?			Finish Car	ncel

- From the Database type drop-down list, select the same database you specified to use for the combined Omni-Gen Server (OGS) and Remediation database during the Omni-Gen[™] for Customer installation.
- 3. Enter *OmniGenDatabase* as the connection name followed by the connection parameters (including your user name and password).

All of the connection parameters (including the database name) must match the database properties you defined for the combined Omni-Gen Server (OGS) and Remediation database during the Omni-Gen[™] for Customer installation.

If your database type is not available in the drop-down list, create it by:

- a. Clicking Manage.
- b. Selecting your database type (for example, MS SQL).
- c. Clicking Add.
- 4. Click Test Connection to verify your connection parameters.

A success message is displayed if your database is accessible and all of your connection parameters are valid, as shown in the following image.

約 Edit Data	base (Conne	ction — [⊐ ×
Edit Datab	ase C	onne	ction	
Database typ	pe:	MS SO	qL v	Manage
Connection r	name:	Omni	GenDatabase	
Connection p By fields Host: Port: Databa O By URL Connection	s ase na	me:	Connection Test Connection to database successful. OK Details >> Jdbc:sqlserver://iwmdm1:1433;databaseName=OG320serv	4-RM
Username:	sa			
Password:	••			
Test Connec	tion			
?			Finish	Cancel

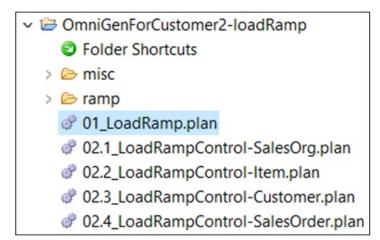
5. Click OK and then Finish to complete the process of adding a database connection.

Load the Omni-Gen Relational OnRamp Tables

You must now load the sample data to the Omni-Gen Relational OnRamp tables and execute the job to process the data using Omni-Gen.

To load the Omni-Gen Relational OnRamp:

1. In the File Explorer tab, double-click 01_LoadRamp.plan, as shown in the following image.



The 01_LoadRamp.plan opens as a tab in your workspace area, as shown in the following image.

IWay DQS - OmniGenForCustomer2-loadRamp/0	1_LoadRamp.plan							- 🗆 ×
File Edit Navigate Search Project Run Windo	w Help							
			-00101	00% - @ 	avaloom		Quick Access 👩 🕯	🖲 Omni Designer 💧 iWay DQS
🕼 File Explorer 😫 🛛 🖻 🗞 🤎 😁 🗖	@ 01_LoadRamp;	plan 12						• •
 D D0 Projects D0 Projects D1 D0 Projects D2 Projects D2 D0 Projects D2 Projects D2 D0 Projects D2 Projects <li< td=""><td>og_outer Ter H og_outer Ter H og_outer Ter H og_outer Ter H</td><td>An and a sector of the sector</td><td>Berner Berner Berner</td><td>er for el la serie el la serie de la serie for el la serie for el la serie for el la serie el la serie for el la serie el la serie for el la serie for e</td><td>Mac towns Mac towns</td><td>eg_sales, ydwr, y Tod Yiel Rasador Marken, ydwr, ang y Carl Yiel Rasador Galander, ydwr, ang y Galander, ydwr, ang y Galander, ydwr, ang y Galander, ywr, y Tod Yiel Rasador</td><td>MC WWAF 13 JDE WHAT DE WHAT DE WHAT DE WHAT JDE WHAT JDE WHAT JDE WHAT JDE WHAT JDE WHAT JDE WHAT</td><td>Connection Comment Co</td></li<>	og_outer Ter H og_outer Ter H og_outer Ter H og_outer Ter H	An and a sector of the sector	Berner Berner	er for el la serie el la serie de la serie for el la serie for el la serie for el la serie el la serie for el la serie el la serie for el la serie for e	Mac towns Mac towns	eg_sales, ydwr, y Tod Yiel Rasador Marken, ydwr, ang y Carl Yiel Rasador Galander, ydwr, ang y Galander, ydwr, ang y Galander, ydwr, ang y Galander, ywr, y Tod Yiel Rasador	MC WWAF 13 JDE WHAT DE WHAT DE WHAT DE WHAT JDE WHAT JDE WHAT JDE WHAT JDE WHAT JDE WHAT JDE WHAT	Connection Comment Co
Action 17 V = D	Properties 11 iWay DQS pla							et ** 0
D. COUNE IN			ment	Message		XML path		
Aerial Structure	Problems Sev	eny cre	indent.	messaye		Your ban		
	rie							
							Licensed to: iWay	Software

2. Right-click anywhere in the white space area of the opened plan and select *Run* from the context menu, as shown in the following image.

Q	Undo	Ctrl+Z
\$	Redo	Ctrl+Y
B	Paste	Ctrl+V
	Print	Ctrl+P
Ħ	Show Grid	
à	Snap to Grid	
*	Vertical Auto Layout	
ee ee	Horizontal Auto Layout	
	Go to Step	Ctrl+G
	Find	Ctrl+F
	Show Used Files	
	Show Used Scorers	
	Insert Step	Insert
\$	Run	Ctrl+F11
	Generate Documentation	
	Save as Image	

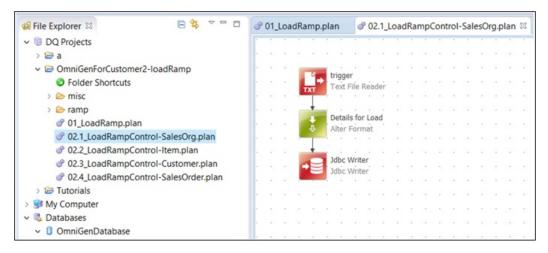
@ 01_LoadRamp.plan 12 TXT TREE Idbc Writer Jdbc Writer 6 Idbc Writer 11 og customer r og customer pho og sales order r Text File Reader Text File Reader Jdbc Writer Text File Reader Jdbc Writer Idbe Write -E 1 111 Jdbc Writer 2 Jdbc Writer 7 Idbc Writer 12 og_customer_address_s es_order_sales_order_ tomer_accou 00.5 Text File Reader Jdbc Writer Text File Reader Jdbc Writer Text File Reader Jdbc Writer 19 1.1 -P 1241 Run Results × og_custom Text File Plan(s) completed successfully. TR Only show this message when there are errors Idbc Writer 9 og_customer_cust sales_org_t Text File Filé Reàde Jdbc Writer OK 12.1 Mbc Writer S Jdbc Writer 10 00_0 stom r_email_ _item_ Text File Render Jdbc Writer Text File Reader Mbc Writer 01_LoadRamp.plan = X ½ 💰 📰 Properties & Run Results G Console 23 <terminated> 01_LoadRamp.plan [Local DQS] C:\Java\jdk1.8.0_131\bin\javaw.exe (Apr 12, 2018, 2:44:27 PM) 12.04.2018 14:44:29 [INFO] 12.04.2018 14:44:29 [INFO] DQS engine initialized. Creating runtime ... 12.04.2018 14:44:29 [INFO] Starting runtime ... 12.04.2018 14:44:29 [INFO] Running runtime 12.04.2018 14:44:39 [INFO] Stopping runtime ... 12.04.2018 14:44:39 [INFO] Finished! 12.04.2018 14:44:39 [INFO] Task completed successfully. Elapsed time: 00:00:10

Once the process is complete, a success message is displayed, as shown in the following image.

If you encounter any errors, then you must verify if you require a schema in your SQL statement by double-clicking on each of the JDBC Writer steps and changing the Table Name as required.

To process the data, continue in iWay DQS to load the sample data from the ramp into Omni-Gen.

3. Double-click 02.1_LoadRampControl-SalesOrg.plan, as shown in the following image.



4. Right-click anywhere in the white space area of the opened plan and select *Run* from the context menu, as shown in the following image.

8	01_	Loa	dRa	mp	.pla	an	0	P 02	2.1_	Loa	dRampControl-SalesOrg.plan ⊠	
			-							4	Undo	Ctrl+Z
	4			-		trigge Text I		n in		\$	Redo	Ctrl+Y
2	2	2	E	TXT		i ext i	-ile i	Keal	Jer	6	Paste	Ctrl+V
1		2		+		Detail	s for	r Los	d		Print	Ctrl+P
	•			4		Alter				Ħ	Show Grid	
									2	ia.	Snap to Grid	
-				+						8	Vertical Auto Layout	
•	÷		F			Jdbc			2	80	Horizontal Auto Layout	
•			1								Go to Step	Ctrl+G
•	•	•	•	•	•		•	•			Find	Ctrl+F
•	*	÷	*	*	*	13	* : :	*	8		Chan Hand Class	
•	•		•				•	*			Show Used Files	
									2		Show Used Scorers	
•		1	•	<u>*</u>	*	1	10	0			Insert Step	Insert
	*		•	•	,		•			\$	Run	Ctrl+F11
•											Generate Documentation	
•	•	•	•	•			•	•			Save as Image	
- 1						2	1		1	_		

Once the process is complete, a success message is displayed.

During the process, you can switch to the Omni Console (Processing -> Work Orders) to verify that the work order is set to ACTIVE.

- 5. Repeat steps 3 and 4 for the following remaining DQ plans:
 - 02.2_LoadRampControl-Item.plan
 - □ 02.3_LoadRampControl-Customer.plan
 - □ 02.4_LoadRampControl-SalesOrder.plan

WSO2 Identity Server and MData Synchronization

This section describes how to synchronize internal data structures using Omni Governance Console (OGC) when adding a new subject.

In this chapter:

- Functional Overview
- □ Using WSO2 Identity Server and MData Synchronization
- Configuring the Environment

Functional Overview

Chapter

WSO2 Identity Server and MData synchronization consists of two parts:

- □ Interaction with OmniDomain. To synchronize the internal data structure (refered to as MData) of OGC.
- □ Interation with WS02. To synchronize permissive mechanisms of the OGC application.

Using WSO2 Identity Server and MData Synchronization

This section describes the prerequisites and steps performed when using the WSO2 Identity Server and MData Synchonization projects.

Prerequisites

The synchronization functionality is intended for use only in OGS Development mode.

To set this mode, click the *Configuration* drop-down list, then click the *Runtime* option in the left pane. In the Runtime section that appears, select the *Omni Server Mode* setting and set the Value to *DEVELOPMENT* to enable the functionality, as shown in the following image.

mniConsole	Configuration: Runtime		2
o: Services	Runtime Data Quality Runtime Se	ver Remediation Command Line	
Configuration -	Runtime		
Runtime	Setting	Value	Description
Databases	Omni Server Mode	DEVELOPMENT	Used to determine if the system is in production or not. 'DEVELOPMENT' is the default. 'PRODUCTION' is the alternative
 Managed Services Deployment 	Server Host Name	vm319560	Host name for the machine executing the server.
Processing	Server Domain	projects.local	Domain for the machine executing the server.
System Logs	Server Start Time		Specifies the time that server last started.
* Testing	Java Process Id		Specifies the current Java process id for the server.
Consoles	Runtime Data Location	C:\OGS\omnigen/OmniServer//	OmniGenData Defines the directory where runtime data such as configuration is stored.

Note: If OGS is unresponsive (because it is not started or in error), the sync function will be disabled.

Using Synchronization

When a new subject(s) is imported into the system, or when the structure of the current one is being altered, you will need to synchronize the updated data structure and the previously existing structure in OGC.

Initialization of the synchronization process can be performed by OGC and consist of the following parts:

Analysis for the sync (and optional customization)

Actual synchronization by the results of the previous action

The following is a sample synchronization process workflow of actions.

Step 1: Initialization of the Analysis for the Sync

From the OGC Application, click *Login*, select *Administration*, click the Sources tab, and then click *Sync*, as shown in the following image.

	alhost:8098/ogc/	source/list			1	🗠 🖸 🔤 🖉	· 📀 🖸 :
360 Viewer	Remediation	Data Quality Monitor	Data Dictionary	Workbench	Grouping	Administration	a see the see that see
Sources View	s Options	Tables Table Order	Settings Exce	ptions			
E Sources List							 Help
Name	Uri				1	Action	
IIMCSource	http:	//vm40834-1:8082/OmniD	omain/v2/data.svc/		(Sync Validate Histor	ry

Step 2: Progressing the Analysis

The analysis for the synchronization process begins, and the status bar displays the dynamic progression status, as shown in the following image.

Sources	Views Opti	ons Tables	Table Order	Settings	Exceptions			
E Source	s List						•	Help
Synchroni	zation status: Sea	arching for Colum	ns to edit custon	nercomm_cl	nanMaster			
Name		Uri				Action		
IIMCSource	•	http://vm40834-	1:8082/OmniDo	main/v2/dat	a.svc/	<u>Sync</u> Va	alidate History	

Step 3: Summarizing the Analysis

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

Remediation Workbench	Administration	super_a (Data Supervi	isor, group.one, System Administrator)	Logout
Sources Views Options	Tables Table Order	Settings Exceptions		
E Sources List + New Source	e			😧 Helj
Scan completed. Updates to take e 4 subject table(s) to be dropped four 4 subject table(s) to be defled fourn 18 column(s) to be added found 17 subject table(s) to be added found noled) to be assigned to users fou Romain(s) to be added to the policy	und d ind ind Details &Edit	it		

Step 4: Viewing Analysis Details

Expand View Details to see the details of the potential update. View Details refers only to the actions modifying the OGC MData structure. To see the details for the WSO2 modifications, click the *Details* link by the respective summary items, as shown in the following image.

Role(s) to be assigned to users found Details /Edit Domain(s) to be added to the policy(-ies) found Details /Edit

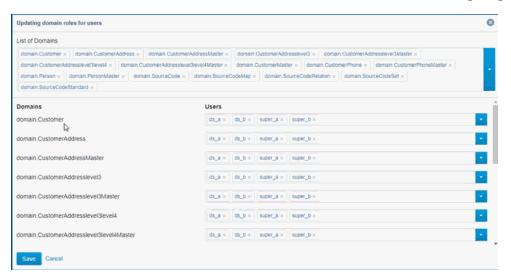
The following image shows the Details link for the Role(s) to be assigned to users found entry.

Sources Views Options Tables Table Order Settings Exceptions III Sources List New Source Scan completed. Updates to take effect found 4 subject table(s) to be dropped found 15 column(s) to be added found 12 column(s) to be added found 13 column(s) to be added found 14 column(s) to be added found 15 column(s) to be added found 16 column(s) to be added found 17 cubject table(s) to be added found 18 column(s) 19 column(s) 10 column(s) 	O He	elp
Scan completed. Updates to take effect found 4 subject table(s) to be dropped found 18 column(s) to be added found 17 column(s) to be added found 17 subject table(s) to be added found 17 subject table(s) to be added found 17 subject table(s) to users found Details / Edit domain.Cusformer, domain.Customer/Address,	Ø He	elp
4 subject table(s) to be directed found 4 subject table(s) to be edited found 15 column(s) to be added found 17 subject table(s) to users found 18 sets and the sets added found 19 s		
domain. CustomerAddressMaster, domain. CustomerAddresslevel3, domain. CustomerAddresslevel3Master, domain. CustomerAddresslevel3, domain. CustomerAddresslevel3Hevel4, domain. CustomerPhone, domain. CustomerPhoneMaster, domain. CustomerPhone, domain. SourceCode, domain. SourceCodeMap, domain. SourceCodeRetation, domain. SourceCodeSet, domain. SourceCodeRetation. domain. SourceCodeSet. domain. SourceCodeRetation. domain. doma	÷ Action	•

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

By default, four users (*ds_a*, *ds_b*, *super_a*, and *super_b*) are granted all the new domain roles (for example, permission to access the new Domains or Subjects). If you need to customize those defaults, click *Edit*.

A dialog appears, allowing you to refine the assigned domain roles. You can add/remove new domain roles and users, and the relations between them, as shown in the following image.



Step 6: Customizing Updated Policies

By default, new domain roles are added to all role sections in policies. If you need to change the default, click *Edit*. A dialog defining which domain roles refer to what role sections in all policies appears. You can match new domain roles to regular roles, as shown in the following image.

New Domains to add					
Customer × CustomerAddress × CustomerAddressMaster	× CustomerAddresslevel3 ×	CustomerAddresslevel	I3Master × Customer/	Addresslevel3level4	×
CustomerAddresslevel3level4Master × CustomerMaster ×	CustomerPhone × CustomerPhone	oneMaster × Perso	n × PersonMaster ×	SourceCode ×	SourceCodeMap ×
SourceCodeRelation × SourceCodeSet × SourceCodeSta	ndard ×				
New Domains to add	Domain roles				
Customer	Data_Steward ×	Data_Supervisor ×	System_Administrator	× User ×	
CustomerAddress	Data_Steward ×	Data_Supervisor ×	System_Administrator	× User ×	
CustomerAddressMaster	Data_Steward ×	Data_Supervisor ×	System_Administrator	× User ×	
CustomerAddresslevel3	Data_Steward ×	Data_Supervisor ×	System_Administrator	× User ×	
CustomerAddresslevel3Master	Data_Steward ×	Data_Supervisor ×	System_Administrator	× User ×	
CustomerAddresslevel3level4	Data_Steward ×	Data_Supervisor ×	System_Administrator	x User x	
CustomerAddresslevel3level4Master	Data_Steward ×	Data_Supervisor ×	System_Administrator	× User ×	

Step 7: Executing the Actual Synchronization

Click Apply Changes to start the actual synchronization process.

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

Remediation	Workbench	Administratio	n	super	_a (Data Supervisor, group.one, Syster
Sources	Views Optio	ns Tables	Table Order	Settings	Exceptions
E Source	s List 🕂 New :	Source			
4 subject t 4 subject t	pleted. Updates to able(s) to be drop able(s) to be edite	bed found d found	d		
72 column 17 subject	(s) to be added for (s) to be dropped table(s) to be add	found ed found			
	be assigned to use to be added to the			lit	
Loading (Apply Cha	and the second se	ß			
View Deta	ils ~				

Step 8: Summarizing the Synchronization

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

360 Viewer	Remediat	ion Data Q	uality Monitor	Workbench	Administration	super_a (l	Data Supervisor, grou	p.one, System Ad			
Sources V	iews Optio	ons Tables	Table Order	Settings	Exceptions						
E Sources Li	st		ß					O Help			
Successfully updated source IIMCSource: added 18, removed 72 and edited 0 columns in existing tables; tables added 17, tables edited 4, tables removed 4, source config items edited 0											
Name		Uri					Action				
IIMCSource		http://vm319560.projects.local:9090/OmniDomain/v2/data.svc/					Sync Validate History				

After all steps have been completed, the OGC application is completely in sync with the new OGS data structure, and fully functional in using the new data.

Configuring the Environment

The following SSL certificates setup occurs when using the synchronization functionality of your environment (for example, IntellijIdea, Eclipse, and so on) with the OGS deployed on a secured gateway (HTTPS).

Note: Perform the following steps only if you are running it in your IDE.

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

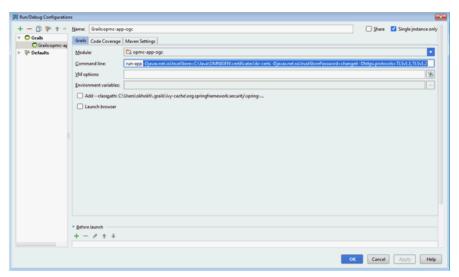
```
-Djavax.net.ssl.trustStore=[path_to_certificates]\ibi-certs
-Djavax.net.ssl.trustStorePassword=changeit -
Dhttps.protocols=TLSv1.1,TLSv1.2
```

where:

ibi-certs

Is the name of the key storage.

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



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

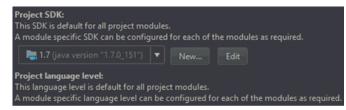
..\[OGS_HOME_DIR]\omnigen\OmniGenData

- 4. Copy the following files:
 - ibi-certs
 - omnigenstore
 - omnigenstore.pem

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

5. Install JDK 1.7 with an update numbered 99 or higher, otherwise requests will fail even with the correct certificates.

6. After installation is complete, click *File*, select *ProjectStructure*, and then link Project SDK to the proper location, as shown in the following image.



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*.

Inf%rmation Builders

iWay

[∕] Omni-Gen[™] for Customer User's Guide

Version 3.10

DN3502315.0819

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

