



# Omni-Gen<sup>™</sup> for Supplier User's Guide

Version 3.2 and Higher

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This documentation describes how to install and use Omni-Gen<sup>TM</sup> for Supplier. It is intended for developers and administrators of Master Data Management (MDM) and Data Quality (DQ) solutions who are using Omni-Gen<sup>TM</sup>.

# How This Manual Is Organized

This manual includes the following chapters:

	Chapter/Appendix	Contents
1	Introducing Omni-Gen <sup>™</sup> for Supplier	Provides an overview of Omni-Gen <sup>™</sup> and introduces Omni-Gen <sup>™</sup> for Supplier.
2	Installing Omni-Gen <sup>™</sup> for Supplier	Describes how to install Omni-Gen <sup>™</sup> for Supplier.
3	Configuring Omni-Gen <sup>™</sup> for Supplier	Describes how to configure Omni-Gen <sup>™</sup> for Supplier.
4	Loading Sample Data	Describes how to load sample data for Omni-Gen <sup>™</sup> for Supplier.
5	Understanding the Omni- Gen™ for Supplier Data Model	Provides reference information for the Omni-Gen <sup>™</sup> for Supplier data model.
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.

<b>Request/Question</b>	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.

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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-Gen<sup>TM</sup> for Supplier

This section provides an overview of Omni-Gen<sup>™</sup> and introduces Omni-Gen<sup>™</sup> for Supplier.

#### In this chapter:

- What is Omni-Gen<sup>™</sup>?
- □ Omni-Gen<sup>™</sup> for Supplier
- Related Documentation

## What is Omni-Gen<sup>™</sup>?

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<sup>™</sup> for Supplier

Omni-Gen<sup>™</sup> for Supplier is a prepackaged solution for mastering the Supplier 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<sup>™</sup> for Supplier 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<sup>™</sup> Master Data Management (MDM) and Data Quality (DQ) Editions:

- □ Omni-Gen<sup>™</sup> MDM and DQ Editions Release Notes
- □ Omni-Gen<sup>™</sup> Installer User's Guide
- □ Omni-Gen<sup>™</sup> Operation and Management Guide
- □ Omni-Gen<sup>™</sup> API Services Reference Guide
- Omni Console User's Guide

- Data Quality Monitor Installation and Configuration Guide
- Data Quality Monitor User's Guide
- Data Quality Workbench User's Guide
- □ Omni<sup>™</sup> Designer User's Guide
- □ Omni-Gen<sup>™</sup> Integration Services User's Guide
- □ Omni-Gen<sup>™</sup> Address Cleansing (Loqate) Installation and Configuration Guide

# Chapter 2

# Installing Omni-Gen<sup>TM</sup> for Supplier

This section describes how to install Omni-Gen<sup>™</sup> for Supplier.

#### In this chapter:

- Overview
- Installation Prerequisites
- Install Omni-Gen Server and Omni Governance Console on Windows
- Known Issues and Considerations

### Overview

Omni-Gen<sup>™</sup> for Supplier 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.

#### Installation Prerequisites

Before Omni-Gen<sup>™</sup> for Supplier, 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
  - □ Teradata: terajdbc4.jar, tdgssconfig.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. GBG Logate Address Verification

Loqate is used to facilitate address cleansing operations and must be installed on the system where  $Omni-Gen^{TM}$  for Supplier 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-Gen<sup>™</sup> for Supplier. 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*-Gen<sup>TM</sup> 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-3.6.3-Windows-SUPPLIER.exe*) from the Information Builders Technical Support Center.

http://techsupport.informationbuilders.com

3. In the File Explorer, right-click the downloaded *omnigen-installer-3.6.3-Windows-SUPPLIER.exe* file and select *Run as administrator*.

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



When the install is ready to begin, the Install Omnigen SUPPLIER Edition window opens, as shown in the following image.



4. Click Next.

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

Install Omnigen SUPPLIER Edition		
	Accept License Agreen	nent
<ul> <li>Introduction</li> <li>Accept License Agreement</li> <li>Choose Installation Folder</li> <li>Choose Java Virtual Machine</li> <li>Specify Base Port Number</li> <li>Specify Base Port Number</li> <li>Specify Location of OmniGen Designer</li> <li>Specify Location of Source Control Jar Files</li> <li>Specify Location of JDBC. Jar Files</li> <li>Configure OmniGen Rever Databases</li> <li>Verify the OmniGen Master Database URL</li> <li>Select the Data Quality Database URL</li> <li>Select the OmniGen Server Port Numbers</li> <li>Verify the Ontal Quality Database URL</li> <li>Select the OmniGen Server Port Numbers</li> <li>Verify the OmniGen Server Port Numbers</li> <li>Install Controller as a Windows Service</li> <li>Choose Elasticsearch Location</li> </ul>	Installation and Use of Omnigen version 3.6.3 Requires Acceptance of the Following License Agreement: INFORMATION BUILDERS, INC. HEREINAFTER "INFORMATION BUILDERS" OR "IBI") CLICKWRAP SOFTWARE LICENSE AGREEMENT ("CWSLA") INFORMATION BUILDERS IS WILLING TO LICENSE THE SPECIFIC SOFTWARE CHOSEN FOR DOWNLOAD AND/OR INSTALLATION AND THE ACCOMPANYING DOCUMENTATION TO YOU ONLY ON THE CONDITION THAT YOU ACCEPT ALL OF THE TERMS OF THIS CLICKWRAP SOFTWARE LICENSE AGREEMENT. IMPORTANT NOTICE TO CUSTOMERS ENCOUNTERING THE DISPLAY OF THIS CWSLA DURING AN INSTALL - READ ALL OF THE TERMS AND CONDITIONS CONTAINED HEREIN CAREFULLY BEFORE ACCEPTING THESE TERMS. YOU ACCEPT THE TERMS BY EITHER: (A) CLICKINS ON THE BUTTON BELOW THAT ACKNOWLEDGES YOUR ACCEPTANCE/AGREEMENT, IF AVAILABLE; (B) REPLYING "YES" WHERE INDICATED, IF PROMPTED; OR (C) PROCEEDING OTHERWISE WITH THE INSTALLATION. BY PROCEEDING WITH THE INSTALLATION, YOU ACKNOWLEDGE THAT YOU ARE ACCEPTING AND AGREEING TO ALL OF THE TERMS AND CONDITIONS CONTAINED HEREIN. BY PROCEEDING WITH THE INSTALLATION, YOU ALSO ACKNOWLEDGE THAT YOU ARE ACCEPTING AND AGREEING TO THE TERMS AND CONDITIONS OF ANY APPLICABLE THIRD PARTY SOFTWARE AND LICENSES USED IN THE SOFTWARE. A LIST OF LICENSES IS AVAILABLE AT http://www.ibi.com/products/third_party_licenses/index.html.	•
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	IF YOU ARE NOT WILLING TO BE BOUND BY THESE TERMS AND CONDITIONS, YOU MUST PROMPTLY TERMINATE THE INSTALLATION PROCEDURE BY CLICKING "NO" (OR "CANCEL") OR REPLYING "NO"(OR "CANCEL") TO EXIT. UPON SUCH TERMINATION PROMPTLY DELETE ANY SOCTIMADE AND DELATED MATERIALS" AND/CO. IMMEDIATELY NOTICY INCOMMATION BUILDEDS I acceptible terms of the License Agreement	v
InstallAnywhere Cancel	Previous Next	

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 pane opens, as shown in the following image.



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

The installer will create a file tree named *OmniGen* at 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. After you have indicated an installation directory, click Next.

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



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

The Specify Base Port Number pane opens, as shown in the following image.

Supplies the state of the second state of the			– 🗆 X.
		Spe	cify Base Port Number.
<ul> <li>Introduction</li> <li>Accept License Agreement</li> <li>Choose Installation Folder</li> <li>Choose Installation Folder</li> <li>Choose Installation Folder</li> <li>Specify Base Port Number</li> <li>Specify Base Port Number</li> <li>Specify Location of Comigen Depository Tomcat Ports</li> <li>Specify Location of Source Control Jar Files</li> <li>Select Source Code Control System and Locati</li> <li>Specify Location of JDBC Jar Files</li> <li>Select Source Code Control System and Locati</li> <li>Specify Location of JDBC Jar Files</li> <li>Configure OmniGen Server Databases</li> <li>Verify the OmniGen Master Database URL</li> <li>Select the Data Quality DB's DBMS type</li> <li>Enter Data Quality Database URL</li> <li>Select the OmniGen Server Port Numbers</li> <li>Install Controller as a Windows Service</li> <li>Choose Elasticsearch Location</li> <li>Verify the OmniGen Governance Console's To</li> <li>Configure OCCE Email Server</li> </ul>	Choose a port number as the starting point. Base Port Number	Spe 9500	cify Base Port Number.
Verify the WSO2 parameters     Enter WSO2 Certificate Parameters			
InstallAnywhere			
Cancel			Previous Next

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

SUPPLIER Edition			-	
		Spec	ify Hostname	and Domain
<ul> <li>Introduction</li> <li>Accept License Agreement</li> <li>Choose Installation Folder</li> <li>Choose Java Virtual Machine</li> <li>Specify Base Port Number</li> <li>Specify Hostname and Domain</li> <li>Configure OmniGen Repository Tomcat Ports</li> <li>Specify Location of Source Control Jar Files</li> <li>Specify Location of Source Control Jar Files</li> <li>Specify Location of JDBC Jar Files</li> <li>Specify Location of JDBC Jar Files</li> <li>Select Source Code Control System and Locati</li> <li>Specify Location of JDBC Jar Files</li> <li>Select Ho Data Quality DB's DBMS type</li> <li>Enter Data Quality Database URL</li> <li>Select the Data Quality Database Connection Para</li> <li>Verify the Data Quality Database URL</li> <li>Select the OmniGen Server Port Numbers</li> <li>Install Controller as a Windows Service</li> <li>Choose Elasticsearch Location</li> <li>Verify the OmniGen Governance Console's To</li> <li>Configure OGC Email Server</li> <li>Preserve or Create New WS02 Repository</li> <li>Verify the W022 Repository</li> </ul>	Enter the Ho Hostname Domain	stname and Domain INFORMA-Q8T67IU Ibi.com		
Enter WSO2 Certificate Parameters				
InstallAnywhere				
Cancel			Previous	Next

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

10. Enter the host domain in the Domain field and then click Next.

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

Sunstall Omnigen SUPPLIER Edition	- 🗆 🗙
	Configure OmniGen Repository Tomcat Ports
<ul> <li>Introduction</li> <li>Accept License Agreement</li> <li>Choose Installation Folder</li> <li>Choose Java Virtual Machine</li> <li>Specity Base Port Number</li> <li>Specity Hostname and Domain</li> <li>Configure OmniGen Repository Tomcat Ports</li> <li>Specity Location of Source Control Jar Files</li> <li>Select Source Code Control System and Locati</li> <li>Specity Location of JDBC. Jar Files</li> <li>Configure OmniGen Baster Databases</li> <li>Verify the Data Quality Database URL</li> <li>Select the Data Quality Database URL</li> <li>Select the Data Quality Database URL</li> <li>Select the OmniGen Server Patabases</li> <li>Verify the OmniGen Server Port Numbers</li> <li>Install Controller as a Windows Service</li> <li>Choose Elasticsearch Location</li> <li>Verify the OmniGen Geverna Console's To</li> <li>Configure OGC Email Server</li> <li>Preserve or Create New WS02 Repository</li> <li>Verify the WS02 parameters</li> <li>Enter WS02 Certificate Parameters</li> </ul>	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
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 pane opens, which prompts for the parameters that define the location of Omni Designer, as shown in the following image.

<ul> <li>Introduction</li> <li>Accept License Agreement</li> <li>Choose Installation Folder</li> <li>Choose Installation Folder</li> <li>Choose Java Virtual Machine</li> <li>Specify Base Port Number</li> <li>Specify Base Port Number</li> <li>Specify Location of OmniGen Designer</li> <li>Specify Location of Source Control jar Files</li> <li>Select Source Code Control System and Location</li> <li>Specify Location of JDBC Jar Files</li> <li>Configure OmniGen Master Database URL</li> <li>Select the Data Quality DB's DBMS type</li> <li>Text Proceed Database VRL</li> <li>Stelet Control Onticen Database URL</li> <li>Stelet Control Control Control System Control Parameters Control System Con</li></ul>	Install Omnigen SUPPLIER Edition	- D X
<ul> <li>Introduction</li> <li>Accept License Agreement</li> <li>Choose Java Virtual Machine</li> <li>Specify Base Port Number</li> <li>Specify Base Port Number</li> <li>Specify Location of Source Control jar Files</li> <li>Specify Location of Source Control jar Files</li> <li>Specify Location of JDBC jar Files</li> <li>Select the Data Quality DB's DBMS type</li> <li>Verify the OmniGen Master Database URL</li> <li>Stelect the Data Quality DB's DBMS type</li> </ul>		Specify Location of OmniGen Designer
Verify the Data Quality Database URL     OmniGen Designer Workspace Directory     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 WS02 Repository     Verify the WS02 parameters     Enter WS02 parameters	Introduction     Accept License Agreement     Choose Installation Folder     Choose Java Virtual Machine     Specify Hostname and Domain     Configure OmniGen Repository Tomcat Ports     Specify Location of OsmiGen Designer     Specify Location of Source Control Jar Files     Select Source Code Control System and Locatl     Specify Location of JDBC Jar Files     Configure OmniGen Server Databases     Verify the OaniGen Master Database URL     Select the Data Quality Database URL     Select the Data Quality Database URL     Select the Data Quality Database URL     Select the OmniGen Server Port Numbers     Install Controler as a Windows Service     Choose Elasticsearch Location     Verify the OmniGen Server Port Numbers     Install Controler as a Windows Service     Choose Elasticsearch Location     Verify the OmniGen Server Port Numbers     Install Controler Server Port Numbers     Configure OGC Email Server     Preserve or Create New WS02 Repository     Verify the WS02 parameters	The proposed ports and location assume a standard installation of OmniGen Designer, and are supplied from data you have already entered. Unless you have done a custom OmniGen Designer installation, leave these values as proposed. Enter Location and Parameters of the OmniGen Designer Bridge Host INFORMA-Q8T67IU Bridge Port 9519 EMF Store Port 9520 OmniGen Designer Workspace Directory C:/omnigen/OmniGenData/OmniDesignerWorkspace Restore Default Choose
Cancel Previous Next	InstallAnywhere Cancel	Previous Next

13. Accept the default parameters and click Next.

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

Install Omnigen SUPPLIER Edition	– – ×
	Specify Location of Source Control .jar Files
<ul> <li>Introduction</li> <li>Accept License Agreement</li> <li>Choose Installation Folder</li> <li>Choose Java Virtual Machine</li> <li>Specify Base Port Number</li> <li>Specify Hostname and Domain</li> <li>Configure OmniGen Repository Tomcat Ports</li> <li>Specify Location of Source Control Jar Files</li> <li>Specify Location of JDBC Jar Files</li> </ul>	Specify Location of Source Control Jar Files         For OmniGen to communicate with a required Source Code Control System (SCCS), it must use "SCCS Jar files" specific to whichever of the two SCCSs (SVN or GIT) you are using with OmniDesigner and OmniGen. The SCCS Jar file(s) are supplied by your SCCS vendor, and you must copy them to a location on the target Omnigen Host machine, and enter the location of the sccs Jar files below.         Please enter the location of the SCCS jar file(s).         C:\sccsjars         Restore Default Folder       Choose
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

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

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



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 is the next pane that opens, as shown in the following image.

Install Omnigen SUPPLIER Edition	- D X
	Select Source Code Control System and Location
Introduction     Accept License Agreement     Choose Installation Folder     Choose Java Virtual Machine     Specity Base Port Number     Specity Hostname and Domain     Configure OmniGen Repository Tomcat Ports     Specity Location of OmniGen Designer     Specity Location of OmniGen Designer     Specity Location of Source Control Jar Files     Select Source Code Control System and Locatl     Specity Location of JDBC Jar Files     Configure OmniGen Master Databases     Verify the OmniGen Master Database URL     Select the Data Quality DB's DBMS type     Enter Data Quality Database Connection Para     Verify the OmniGen Server Port Numbers     Verify the OmniGen Server Port Numbers     Install Controller as a Windows Service     Choose Elasticsearch Location     Verify the OmniGen Governance Console's To     Configure Oder Cenail Server     Preserve or Create New WSO2 Repository     Verify the WSO2 parameters     Enter WSO2 Certificate Parameters	You must select which of the supported SCCS's, SVN or GIT, are used by the Repository Service. The defaults for each SCCS choice are supplied for a standard SCCS install, and from information already entered in this installer session.  Select the Source Control Change System and its Connection Parameters  SVN URL http://INFORMA-Q8T67IU:8800/svn/OmniDesigner User Name admin Password admin  gtt
InstallAnywhere 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 pane opens, as shown in the following image.



17. Specify the location of your JDBC .jar file(s) and click Next.

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

Install Omnigen SUPPLIER Edition	– D X
	Configure OmniGen Server Databases
<ul> <li>Introduction</li> <li>Accept License Agreement</li> <li>Choose Installation Folder</li> <li>Choose Java Virtual Machine</li> <li>Specity Base Port Number</li> <li>Specity Hostname and Domain</li> <li>Configure OmniGen Repository Tomcat Ports</li> <li>Specity Location of Source Control Jar Files</li> <li>Select Source Code Control System and Locati</li> <li>Specity Location of JDBC Jar Files</li> <li>Configure OmniGen Master Database URL</li> <li>Select the Data Quality Database Connection Para</li> <li>Verify the OmniGen Server Port Numbers</li> <li>Install Controlien Server Port Numbers</li> <li>Install Controlien Server Port Numbers</li> <li>Choose Elasticsearch Location</li> <li>Verify the OmniGen Server Port Surface</li> <li>Choose Elasticsearch Location</li> <li>Verify the OmniGen Governance Console's To</li> <li>Configure OGC Email Server</li> </ul>	Overview of OmniGen Databases & their Configuration         OmniGen uses 3 logical Databases: The OGS Database, The Remediation Database, and the OGS Data         Quality (DQ) Database         Both the OGS Database tables and the Remediation Database tables are created and managed in the same physical database which is specified in the following screens in response to the Installer's prompts for the Remediation Database parameters.         Following the entry of Remediation Database configuration parameters, the DQ Database tables will be created in the location specified in response to the Installer's prompts for the DQ Database parameters.         When configuring the two (Remediation and DQ ) database locations, you may configure two separate locations, one each for Remediation and DQ , or you may configure 1 physical location for all three Databases. The example in this document will use 2 different Database names, one for the (OGS plus Remediation Databases, and One for the DQ Database.
Verify the WSO2 parameters	
Enter WSO2 Certificate Parameters	
InstallAnywhere	
Cancel	Previous Next

18. Review this information and click Next to continue.

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

Install Omnigen SUPPLIER Edition	
	Select the DBMS type of the Remediation Database
Introduction     Accept License Agreement     Choose Installation Folder     Choose Installation Folder     Choose Java Virtual Machine     Specify Hostname 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 Locat     Specify Location of JDBC jar Files     Configure OmniGen Reserver Database     Verify the OmniGen Master Database URL     Select the OmniGen Server Database     Verify the Data Quality DB's DBMS type     Enter Data Quality Database URL     Select the OmniGen Server Ront Numbers     Install Controller Server Ront Numbers     Install Controller as a Windows Service     Choose Elasticsearch Location     Verify the OmniGen Server     Preserve or Create New WSO2 Repository     Verify the WSO2 parameters     Enter WSO2 Centificate Parameters	Select the DBMS type used for OGS & Remediation Databases OB2 Oracle Postgres SiglServer - Microsoft Driver SiglServer - OpenSource JTDS Driver Teradata
Cancel	Previous Next

- 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 pane opens for your selected database, as shown in the following image.

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

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

Install Omnigen SUPPLIER Edition	
	Verify the OmniGen Master Database URL
✓ Introduction	
✓ Accept License Agreement	Review and or Edit the OmniGen Server (OGS) database URL
✓ Choose Installation Folder	
🗸 Choose Java Virtual Machine	
✓ Specify Base Port Number	
<ul> <li>Specify Hostname and Domain</li> </ul>	
✓ Configure OmniGen Repository Tomcat Ports	Database LIDI idho sedsenver //iocalhost 1423; databasename-omnigen; sendStringDarameters Asl Ini
<ul> <li>Specify Location of OmniGen Designer</li> </ul>	Jub. sqiseiver. mocanosi. 1455, uatabasename=onnigen, sendstning-arametersAsoni
<ul> <li>Specify Location of Source Control .jar Files</li> </ul>	
✓ Select Source Code Control System and Locati	
<ul> <li>Specify Location of JDBC .jar Files</li> </ul>	
✓ 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

22. Verify the database URL and click Next.

If the following message appears, indicating that your connection test failed, then 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 pane opens, as shown in the following image.



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

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

	Enter DQ Database Parameters: SQLServer with Microsoft or Open driver
Introduction     Accept License Agreement     Choose installation Folder     Choose installation Folder     Choose Java Virtual Machine     Specify Base Port Number     Specify Hostname and Domain     Configure OmniGen Repository Tomcat Ports     Specify Location of Source 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 JDBC Jar Files     Select Source Code Control System and Locati     Specify Location of JDBC Jar Files     Select the OmniGen Master Database URL     Select the 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 Centificate Parameters	Enter the OmniGen Server Data Quality Database Connection Parameters If you are using the same Database for OGS, Remediation, and DQ tables, just Click Next User Name sa Password Iway451 Host omniserv15 Port 1433 Database Name OG36-72 Instance
InstallAnywhere Cancel	Previous Next

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

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



26. Verify the database URL and click Next.

If the test is successful, then the Data Quality Database Connection Test Passed pane 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 to continue.

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



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

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

		Verify the OmniGen Server Port Numbers - https
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 Selet Source Code Control System and Locati Specify Location of JDBC. Jar Files Configure OmniGen Server Databases Verify the OmniGen Master Database URL Selet Source Code Control at Specify Location Configure OmniGen Server Databases Verify the OmniGen Master Database URL Selet Source Code Control System	Enter the OmniGen Se Controller Port Server Port Deployment Tool Serv	9500 9514 Prver Port 9502
Control to Data Quality Database Connection Para     Verify the Data Quality Database URL     Select the OrmilGen Server Runtime Protocol     Verify the OrmilGen Server Port Numbers     Install Controller as a Windows Service     Choose Elasticsearch Location     Verify the OrmilGen 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

- 29. Accept the default values, but change them if the infrastructure manager informs you of a conflict and recommends change(s) to an alternate available port(s).
- 30. Click Next.

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



31. Accept the default or modify as required. Click Next to continue.

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

		Use Included Elast	ticsearch or Existing one
Introduction     Accept License Agreement     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 OmniGen Designer     Specify Location of OmniGen Designer     Specify Location of DDBC. Jar Files     Select Source Control System and Locati     Specify Location of DDBC Jar Files     Configure OmniGen Master Database URL     Select the OmniGen Master Database URL     Select the Otata Quality DB's DBMS type     Enter Data Quality Database Connection Para     Verify the OmniGen Server Port Numbers     Install Controller as a Windows Service     Choose Elasticsearch Location     Verify the OmniGen Governance Console's To     Configure OGCE Temail Server     Preserve or Create New WSO2 Repository     Verify the WSO2 parameters     Enter WSO2 Centificate Parameters	OmniGen Server can use it Answer Yes below to use th Answer No if you wish to us Do you want to use the Elas Yes Elastic search http port Elastic search api port No	s own, included, Elasticsearch, or an already install he Elasticsearch included with OmniGen Server e an already installed Elasticsearch sticsearch included with OmniGen Server? 9522 9523	ed, existing, one.
Cancel			Previous Next

32. Accept the default or modify as required. Click *Next* to continue.

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

	Verify the OmniGen Governance Console's Tomcat Parameter	ers
Introduction     Accept License Agreement     Choose Java Virtual Machine     Specify Base Port Number     Specify Base Port Number     Specify Location of OmniGen Designer     Specify Location of OmniGen Designer     Specify Location of Source Control Jar Files     Select Source Control System and Locati     Specify Location of JDBC. Jar Files     Configure OmniGen Server Databases     Verify the OmniGen Master Database URL     Select the Data Quality Database URL     Select the Data Quality Database URL     Select the Data Quality Database URL     Select the OmniGen Server Port Numbers     Install Controllers a Windows Service     Choose Elasticsearch Location     Verify the OmniGen Gevernance Console's To     Configure OGC Email Server     Preserve or Create New WS02 Repository     Verify the WS02 parameters     Enter WS02 Centificate Parameters	Enter the Omni Governance Console Tomcat information Hostname omniserv15.ibi.com HTTP Port 9501 HTTPS Port 9526 Ajp Port 9525 Shutdown Port 9524 Admin User admin Admin Password admin	
InstallAnywhere Cancel	Previous	

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

33. Accept the default values and click Next.

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

	Configure OGC Email Server
Introduction  Accept License Agreement  Choose Installation Folder  Choose Java Virtual Machine  Specify Base Port Number  Specify Location of Domileen Designer  Specify Location of Source Control Jar Files  Select Source Code Control System and Locat  Specify Location of JDBC Jar Files  Configure OmniGen Reser Databases  Verify the OmniGen Master Database URL  Select 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 Elastics arch Location Verify the OmniGen Governance Console's To  Configure OCC Email Server Verify the WSO2 Parameters Enter WSO2 Certificate Parameters	OGC's Remediation Service provides optional E-Mail notification of Ticket and Case Reassignments To enable this service, your installation's SMTP Server must be configured to transmit these E-Mails. If you are not using this optional feature, leave these dialog boxes empty, and simply Click Next Enter SMTP Parameters for OGC E-Mails SMTP Host SMTP Port Email Notification From SMTP Username SMTP Password SMTP SSL Enabled (true or false)
InstallAnywhere Cancel	Previous Next

- 34. Unless you are adding the e-mail 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 e-mail option, provide values for the following parameters as they apply to your SMTP, e-mail 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.** E-mail address from which the Assignment e-mails will originate (for example, *OmniGen\_Remediation@ibi.com*).
  - **SMTP Username**. User name for accessing the e-mail server.
  - SMTP Password. Password associated with the user name for accessing the e-mail server.
  - SMTP SSL Enabled (true or false). Specify, *true* if your e-mail server supports or requires SSL authentication.

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

- Each LDAP user with the Data Steward or Data Supervisor role, and who will receive Assignment e-mails, must have a valid e-mail 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 pane, the Preserve or Create New WSO2 Repository pane 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 pane opens, as shown in the following image.

		Verify the WSO2 parameters
Introduction     Accept License Agreement     Choose Installation Folder     Choose Java Virtual Machine     Specify Base Port Number     Specify Hostname and Domain     Configure OmniGen Repository Tomcat Ports	Unless your s parameters a Verify the WS WSO2 Host	system administrator instructs you otherwise, leave these standard WSO2 location It the default values, and Click Next SO2 connection parameters omniserv15.lbi.com
Specify Location of Source Centrol Jar Files     Specify Location of JDBC jar Files     Select Source Code Control System and Locat     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 Runtime Protocol     Verify the OmniGen Server Port Numbers     Install Controller as a Windows Service     Choose Elasticsearch Location     Verify the OmniGen Gevernance Console's To     Configure OGC Email Server     Preserve or Create New WSO2 Repository     Verify twSO2 parameters     Enter WSO2 Certificate Parameters	WSO2 Port	9503
Cancel		Previous Next

37. Confirm the WSO2 parameters and then click Next.

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

	Enter WSO2 Certificate Parameters
Introduction     Accept License Agreement     Choose Installation Folder     Choose Java Virbual Machine     Specify Base Port Number     Specify Base Port Number     Specify Location of OmniGen Designer     Specify Location of OmniGen Designer     Specify Location of OmniGen Designer     Specify Location of JDBC jar Files     Select Source Code Control System and Locati     Specify Location of JDBC jar Files     Configure OmniGen Server Database     Verify the OmniGen Server Database URL     Select the Data Quality Database Connection Para     Verify the OmniGen Server Port Numbers     Install Controller as a Windows Service     Choose Elastics earch Location     Verify the OmniGen Server Port Numbers     Install Controller as a Windows Service     Choose Elastics earch Location     Verify the OmniGen Governance Console's To     Configure OGE Email Server     Preserve or Create New WSQ2 Repository     Verify the WSQ2 parameters     Enter WSQ2 Certificate Parameters	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 The parameters below are used in the creation of a "Self Generated" Certificate. The certificate can be replaced with a certificate from a commercial Certificate issuing Agency. Leave the value for address of your host, as it has been garnered from information already supplied earlier in this installer Q&A session. Supply values for the remaining 5 questions. Enter the parameters required by the Java keytool What is the address of your nost? Omniserv15.ibi.com What is the name of your organizational unit? What is the name of your citly or locality? What is the name of your state or province? What is the name of your state or province?
Cancel	Previous Next

38. Collect the parameters to generate the certificate for WS02.

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 enter the other parameters. For example:



40. Click Next.

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

		Verify or change JVM Memory Settings
<ul> <li>Introduction</li> <li>Accept License Agreement</li> <li>Choose Installation Folder</li> <li>Choose Java Virtual Machine</li> <li>Specify Base Port Number</li> <li>Specify Hostname and Domain</li> </ul>	It may become necessary to system administrator and-ou these values as the default Verify and or edit the JVM N	allocate more memory to the Tomcat Servers in Omnigen. Unless your Omnigen Installation support analysts specify different values, leave displayed. emory Settings
Configure OmniGen Repository Tomcat Ports     Specify Location of OmniGen Designer	Controller Max Memory	1024M
Specify Location of Source Control Jar Files     Select Source Code Control System and Location	Console Max Memory	1024M
✓ Specify Location of JDBC .jar Files	OmniServer Max Memory	1024M
<ul> <li>✓ Configure OmniGen Server Databases</li> <li>✓ Verify the OmniGen Master Database URL</li> </ul>	Command Line Max Memory	1024M
<ul> <li>Select the Data Quality DB's DBMS type</li> </ul>	DQ Cleansing Max Memory	1024M
Enter Data Quality Database Connection Para     Verify the Data Quality Database URL	DQ Matching Max Memory	1024M
Select the OmniGen Server Runtime Protocol     Verify the OmniGen Server Port Numbers	DQ Merging Max Memory	1024M
✓ Install Controller as a Windows Service	DQ Remediation Max Memo	ry 1024M
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 WBO2 parameters	Elastic Search Max Memory	1024M
InstallArwwhere		
Cancel		Previous

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

The Pre-Installation Summary pane 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 pane opens, indicating that the configuration for installation is complete, as shown in the following image.



43. Click Install to proceed with installation.

Installing Omnigen Introduction ✓ Accept License Agreement Choose Installation Folder V 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 × Omnigen Configure OmniGen Server Databases Executing Installation Script... 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 Installing... Execute Script/Batch file: Runs the initial Windows script Enter WSO2 Certificate Parameters 100 Cancel

Progress of the installation is shown on the Installing OmniGen pane, as shown in the following image.

The Omni-Gen Supplier installation is complete when the Install Complete pane is displayed, as shown in the following image.



You are now ready to configure Omni-Gen<sup>TM</sup> for Supplier. For more information, see *Configuring Omni-Gen*<sup>TM</sup> for Supplier on page 57.

# **Known Issues and Considerations**

This section describes known issues and considerations for Omni-Gen<sup>™</sup> for Supplier Version 3.4.

### Error 500 Screen in Omni Governance Console

An Error 500 screen is displayed whenever an Omni Governance Console (OGC) user attempts to use the Advanced Search feature in 360 Viewer on certain fields in Supplier Sub Collections.

This error occurs on certain advanced search filters for Address Omni Collection, Email Omni Collection, Phone Omni Collection, and Vendor PO Omni Collection. Any of these fields being added to the Advanced Search Sub Collections Filter and used will cause the error.

None of these fields are configured in the default search list that is shipped with Omni-Gen<sup>™</sup> for Supplier Version 3.4. Users who customize the Advanced Search filters are advised not to use the filters (columns) below until a Hotfix addressing the usage of these fields is made available.

Note: The fields are displayable (configurable in views, but not filterable).

The filters (columns) to avoid are:

- In Table Supplier Address Master (for Address Omni Collection)
  - Address Geographic Area
  - □ Address Geographic Area Description
  - Address Type
  - Address Type Description
- □ In Table Supplier Email Master (for Email Omni Collection)
  - Email Type
  - Email Type Description
- □ In Table Supplier Phone Master (for Phone Omni Collection)
  - Phone Type
  - Phone Type Description
- In Table Supplier Vendor PO Master (for Vendor PO Omni Collection)
  - shiptoGeographicArea
  - OrderPriority
  - VendorGeographic Area

The following error message is displayed when using these filters (columns):

Internal Server Error. Source response info: Error Type: DaoException Message: An exception occurred while creating a query in EntityManage



# Configuring Omni-Gen<sup>™</sup> for Supplier

This section describes how to configure Omni-Gen<sup>™</sup> for Supplier.

#### In this chapter:

□ Configuring Omni-Gen<sup>™</sup> for Supplier

# Configuring Omni-Gen<sup>™</sup> for Supplier

This section describes how to configure Omni-Gen<sup>™</sup> for Supplier 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<sup>™</sup> Master Data Management (MDM) and Data Quality (DQ) Editions.

- 1. Open a command prompt window.
- 2. Execute the following command:

omni start-controller

This will start only the controller and none of the other services. The services can be started one at a time using the Omni Console.

3. 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*.

4. Start the *Elastic Index* utility, *Deployment Bundler* service, and the *Designer Repository* service.

	¢ <sup>e</sup> Managed Services	
	► Start All Stop All O Restart All	
<ul> <li>c° Services</li> <li>✓ Configuration ▼</li> <li>© Deployment</li> </ul>	Data Processing Omni Server	OFF ON
Processing   O	Data Quality Cleansing	OFF ON
<ul> <li>Testing ()</li> </ul>	Matching	OFF ON
Consoles	Remediation Workbench Cleansing	OFF ON
	Omni Services	
	Designer Repository Deployment Bundler	OFF ON
	OGC Services OGC Tomcat	🗘 Starting
	WS02	OFF ON
	Utilities 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 deployment bundle is deployed.

5. Open Omni Designer by navigating to C:\omnigen\OmniDesigner, right-click OmniDesigner.exe and select Run as Administrator from the context menu.

- 6. Create a new repository.
  - a. Click the *Add* Service icon in the Designer Repository tab, which is located in the lowerleft.



The Add the Designer Repository Service dialog opens, as shown in the following image.

Add	the Designer Repository Service 📃 🗖 🗙			
Designer Repository Service Details Specify Designer Repository Service details.				
Name:	Supplier			
Protocol :	http 🗸			
Host:	localhost			
Path:	com.iwaysoftware.omni.designer.repositoryservice			
Port :	8888			
?	Add Service Cancel			

- b. Specify a repository name (for example, Supplier) and leave the default values for the remaining parameters.
- c. Click Add Service.

The new repository service is added as a node in the Designer Repository tab.

d. Right-click the new repository service (for example, Supplier) and select *Login* from the context menu.

The Authentication required dialog opens, as shown in the following image.

Authentica	ation required	_ <b>D</b> X
Login to Reposit		
Username: Password: Save password:		
?	Login	Cancel

- e. Enter the following login credentials:
  - □ Username: super
  - Password: super
- f. Click Login.
- 7. Import the project (that contains the Supplier 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.



The Select a Repository Service dialog opens, as shown in the following image.

Select a F	Repository Service	_ □	x
Select a Repo	sitory Service		
To import the Pro select a Repositor	oject, you have to y Service.		
OmniGen De	mo		
?	Import	Cance	:I

- 8. Select Supplier and then click Import.
- 9. Select your local repository into which the project will be imported.
- 10. Browse to the Supplier project located in:

 $\verb|C:\omnigen\OmniGenData\OmniSupplier\OmniGenforSupplier\_1.0.0.RC.1.zip|| \\$ 

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

	Omni Designer Project	_ <b>D</b> X							
Import Omni [	Import Omni Designer Project								
In case a licer will not be im	nse of the Project Bundle differs from the current license, some artifacts ported.								
Project name:	Supplier								
Description:	Supplier Project	<u>^</u>							
		~							
?	Finish	Cancel							

A progress information window opens, which provides a status on the import process. Please wait (more than a minute) until the system loads all of the artifacts.

The Project has been Successfully Imported window opens. Click OK.

After the project is imported, the Supplier model is loaded. You can use the Project Explorer tab in the left pane to review the model, as shown in the following image.

Omni Designer - Input Da File Edit Navigate Search	ta M Pro	odels - oject Run N	Window Help		-			×		
		4	• 1 • 1 • 1	$(\phi \bullet \phi) \bullet$	Quick Access 🛛 😰 🖉	Omni I	Desig	gner		
ig Project Expl 🗱 🗖 🗖	21	nput Data Me	odels 🕸					- 0		
🖻 😫 🝙 🔻	+ (	Create X De	elete 🕆 Move Up	& Move Down & Reset sorting	🔗 Update Content Types					
Customer v.0 [trunk]		Name		Data Types	Description					
🗸 👶 Input Data Models	1	Email		String	Email Address		_	_		
> 👶 Customer	2	Companyle	alForm	String	Company Legal Form					
> 🤐 Reference Data Moc	3	Country	garonn	String	Country					
> @ Remediation Rules	4	DateAsStrin	a	String	Date (as string)					
	5	Phone		Integer, Long, String	Phone Number					
	6 USAState			String	USA State Social Security Number					
				String, Long, Integer						
	8	DateOfBirth	1	String, Date, Datetime	Date of Birth					
	<	tent Types						>		
Derinner Pa		roportion 17	Problems 015	rror Lon 🎬 Data Source Evolutor		-+	~ *			
Designer Ne in		roperties as	Problems VE	Tor Log and Data Source Explorer						
0, local		neral	Name:	Email				î		
	Da	ta Types	Short Description:	Email Address						
							^			
			Long Description:					~		

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

				Omni Designe	er - Supplier	-		_	
File Edit	Nav	igate Search Project Run	Window H	elp					
<b>*</b> - E	6	Source Clean	nsed 🍱	<b>Q<sub>4</sub> • ∦ • ⊵</b> • ₽ •	*> <> - <>	• ≠ ≧   Q, Q, [	✓ Quic	k Access 🛛 😰 Omr	ni Designer
In Project	t Evolo	ver 😢 😐 🖪 🔍 loout D	ata Models	Supplier S?					
La Projec	L LXpio		ata models		1.6 -				
. 53.0.		- S Create	💥 Delete	[ 상 Move Up 강 Move Down	n   🔊 Reset soi	rting	1		
⊿ <u>uog su</u>	R	Commit		e	Data Type	Reference Value	Content Type	Description	^
4 600	1	Undate	Alt+U	ame	String N	·	<empty> v</empty>	The first name for a supplie	er party
	1	Undate To Version		leName	String N	·	<empty> v</empty>	The middle name for a sup	plier par
		opulate to version		ame	String N	1	<empty> v</empty>	The last name for a supplie	r party
	0	Undo	Ctrl+Z	ame	String N	*	<empty> v</empty>	The full name of a vendor p	party (e.c
	0	Redo	Ctrl+Y	DrganizationName	String N	/	Comporm v	The legally identified name	for a ve
*	Ģ	Revert All Operations		ProhibitionInd	String N	·	<empty> v</empty>	A Y/N indicator that identit	:ies a tra. <sup>≡</sup>
4 🖳		Show History		N	String N	·	SSN 🗸	The tax identification num	per/socia
	×	Delete	Delete	nasedAmountYTD	Float v	1	<empty> v</empty>	The total amount purchase	d from t
		Other	,	actPurchaseAmountYTD	Float N		<empty> v</empty>	The total amount that we c	:ontractu
		lucional Descionat		ctOrderPercent	Integer N	1	<empty> v</empty>	The percent of orders deliv	ered fror
		Import Project		neDeliveryPercent	Integer N		<empty> v</empty>	The percent of orders deliv	ered on
		Export Project	,	tePercent	Integer N		<empty> v</empty>	The percent of ordered qua	antity the
		Close Project		geLeadtimeDays	Integer N	/	<empty> v</empty>	The average number of day	ys from c
	<b>C</b>	Generate Project Bundle		alSalesRevenue	Integer v		<empty> v</empty>	The last reported yearly sale	es reveni
	-	DQ Project	•	alitylssuesYTD	Integer N		<empty> v</empty>	The total number of a supp	olier's pro 🗸
	-	Manago Source Surtems		III					>
<		Nanage Source Systems	53	Model Dimensions					
Design	er Rep	properties	ies 🛛 🔝	Problems 👰 Error Log 🎉 Da	ata Source Explo	orer			~
		NR (B)	Property		Value				^
🔒 Or	nniGe	n Demo General	⊿ Associ	ated DO Proiect Info	Value	-			
🚺 Su	pplier		Na	me	Supp	lier			
	Ve		rsion	11					
			⊿ Info						
Description				Supp	lier Project				
			Na	me	Supp	lier			
C			⊿ Versio	ns · · ·					<b>v</b>
🗟 1 item :	selecte	ed .							

This will commit changes to the source management system.

You can now generate a project bundle for deployment.

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

🔄 Project Expl 🛛 🗌	L.	□ 🖧 Input Data Models 🕸	۲ ۲ Move Up	A Move Down
<ul> <li>Customer v.1 [tr</li> <li>Input Data N</li> <li>Input Data N</li> <li>Input Data N</li> <li>Reference Data</li> <li>Reference Data</li> <li>Remediation</li> </ul>		Commit Update Update To Version Undo Redo Revert All Operations Show History	Alt+U Ctrl+Z Ctrl+Y	Data Types tring tring tring nteger, Long, Sti tring tring, Long, Inte
	*	Delete Other	Delete >	tring, Date, Dat
	2 2	Import Project Export Project Close Project	>	
	1	Generate Project Bundle DQ Project	>	
<		Manage Source Systems Properties	F3	ror Log 🙀 Data

The Project Bundle Generation dialog opens, as shown in the following image.

	Generating project hundle	_		x
	Project Bundle Generation		x	
Release Number:				
Development Stage:	Alpha v 0 🔨			
Release Notes:	Rel Num 101		^	
			×	
	Generate Ca	ancel		

13. Provide a description (optional), the proper bundle versioning, and then click Generate.

Please wait a minute for the project bundle to generate.

14.Once this process has finished, close Omni Designer. Open a browser and enter the following URL to create the deployable project bundle:

https://host.domain:9502

This process gathers all of the artifacts for DQ, Remediation, Model, OGC, and others, and packages them for deployment into runtime.

🥠 OmniConsole 🛛 🗙 🍏 Omni	🍏 OmniCansole X 🧐 OmniCansole X 🌚 OmniGen Deployment C X 🔽									
$\leftrightarrow$ $\rightarrow$ C (i) localhost:8090							☆ :			
🍘 OmniConsole	Project Bundles									
Project Bundles										
	Project Name	Project Id	Notes	Number	Created					
	Supplier	_o3ctEAY1Eeil8pFkwztF8w	Rel Num 101	1.0.1.Alpha.0	Jan 30, 2018 10:50:37 PM					

15.Click the green run icon, which writes the deployable project bundle to disk as a .zip file.

When the deployment bundle is generated successfully, a message is displayed, as shown in the following image.

🍈 OmniConsole x 🦃 OmniConsole x								
Ø OmniConsole ♀ Project Bundles								
Project Bundles								
	Project Name	Project Id	Notes	Number	Created			
	Supplier	_o3ctEAY1Eeil8pFkwztF8w	Rel Num 101	1.0.1.Alpha.0	Jan 30, 2018 10:50:37 PM			
	Successfully created deplo .//omnigen_dep_Supplier_	oyment located at: 1_0_1_Alpha_0_180130231818.zip						
	+ Processing Events							
	Download omnigen_dep_9	Supplier_1_0_1_Alpha_0_180130231818						

16.Return to the Omni Console - Managed Services page at:

https://host.domain:9500/pages/managed\_services

17.Optionally, stop the Designer Repository and Deployment Bundler services.

**Note:** You should stop these two services only if you need to free up resources on your system.

18.From the Omni Console - Deployment page, click *Install Bundle* and browse to the project bundle that you recently generated, which by default is located in the following directory:

#### C:\omnigen\deploymentbundle

← → C ▲ Not se	cure https://ig10588-2.ibi.com:9500/pages/deployment
Apps 🗋 test mail ap	is 🤬 WSO2 Management 🛯 🧐 OmniConsole 🧐 OmniGen Deploymer 👘 OGC 🌓 Tickets for Chicago 🧕 raml_restlet 🌘 Swagger UI 🕐 Drive Medical I
mniConsole  ≡	C Deployment
	<b>2</b> Instal Bunde
os Services	
🗲 Configuration 👻	Deployment Bundle Not found
Deployment	Please click the install bundle bundle bundle bundle bundle bundle bundle bundle for deployment.
Processing -	
System Logs	
* Testing 1	
Onsoles	

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.

Deployment Progress				
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	
Initializing 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	
Update Model Tables	Complete	2017-12-22 18:27:50.286	3.013	
Update 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	
				*

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

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

Now it is time to start the services.

20.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

The first user who accesses the Omni Governance Console (OGC) with the *System\_Administrator* role will be prompted to load OGC metadata, which defines the layout of the screens in OGC.

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

https://host.domain:9501/ogc/

2. Login as a user with the System\_Administrator role.

3. Load the predefined set of metadata, as shown in the following image.



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

C:\omnigen\OmniGenData\mdata

4. 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.

← → C <sup>*</sup> ⊙ local <sup>®</sup>	ost:9090/ogc/domai sis 🧕 WS02 Manage	n/view/_87	e 🍵 OmniGen Deplo	yme: OGC	Tickets for Chicago	o 🔕 ramijnes	tlet 🌘 Swapper UI 🛞 Drive Me	dical Ultra L 😽 LE MA	RAIS - Tiered S	G	k ☆ € r Showro	0	a .:
360 Viewer	Remediation	Workbench	Administrat	ion			super_a (Data Superviso	r, group.one, Sys	tem Adminis	trator) L	ogout.	0 -	
360Vie	wer	CustomerMaster	Advanc	ed Search	•								
CustomerMas	ter 🕕										Linking		
Showing 0 of 0 re	cords. Number of	records per page	20 •								44.4	-	
Id	0 First I	Name	Cast Name	\$	Gender	٥	Date Of Birth	Full Name	٥	Issues	Ac	tions	
No data available	in table												
Showing 0 of 0 re	cords. Number of	records per page	20 •								-44 -4	-	



# **Loading Sample Data**

This section describes how to load sample data for Omni-Gen<sup>™</sup> for Supplier.

#### In this chapter:

- Creating a Database Connection
- Accessing the Sample Data
- Loading the Omni-Gen Relational OnRamp Tables

## **Creating a Database Connection**

Before continuing, you must first 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<sup>™</sup> for Supplier installation. For example, the database name must match in both areas. To review the installation, see Step 20 in *Install Omni-Gen Server and Omni Governance Console on Windows*.

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.
---	------------------------------------

👌 Edit Datab	ase Co	onnectio	on											×
Edit Databas	se Cor	inectio	'n											
Database type	e:	MS SQL	L									~	Mar	nage
Connection name: Omni		OmniG	ien Databa:	se										
Connection p	arame	ters:												
O By fields														
Host:														
Port:			1433											
Database name:		me:												
By URL														
Conne	ection	string:	jdbc:sqlse	erver://lo	ocalhos	st:1433	3;datab	aseName	e=or	nnisup	plier36	5		
Username:	sa													
Password:	••••	•••••												
Test Connec	tion													
?										Fini	sh		Canc	el

- 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<sup>™</sup> for Supplier 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<sup>™</sup> for Supplier 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.

🍓 Edit Data	abase	Connec	ction — D	X
Edit Datab	ase C	onne	ction	24
Database typ	pe:	MS SC	2L ~	Manage
Connection r	name:	Omni	GenDatabase	
Connection p By field: Host: Port: Databa O By URL Conne	param s ase na ction s	eters: me:	Connection Test Connection to database successful.  OK Details >>  jdbc:sqlserver://wmdm1:1433,databaseName=OG320serv	4-RM
Username:	sa			
Password:	••			
Test Connec	ction			
?			Finish	ancel

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

# Accessing the Sample Data

After Omni-Gen<sup>™</sup> for Supplier is installed, sample data, including Data Quality (DQ) plans that you can edit and run, is available in the following location:

C:\omnigen\OmniGenData\OmniSupplier\**OmniGen** 

The following image shows the contents of this folder.

Loca	al Disk (C:) > omnigen > OmniGenData >	OmniSupplier > OmniGe	n ~ Ö
^	Name	Date modified	Туре
	🧵 data	2/16/18 4:11 PM	File folder
	project	2/16/18 12:10 PM	PROJECT File
	1_loadRamp.plan	2/16/18 12:10 PM	PLAN File
	2_loadRampControl.plan	2/16/18 12:10 PM	PLAN File

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.

_ <b>_</b> ×
Quick Access 😰 🕸 Way MDS 🎍 Way DQS

There are two ways you can access the sample data for Omni-Gen<sup>™</sup> for Supplier:

1. Using the File Explorer tab.

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

C:\omnigen\OmniGenData\OmniSupplier\OmniGen

Double-click 01\_LoadRamp.plan or 02.0\_LoadRampControl.plan, which opens the selected plan as a tab in your workspace area. You can modify, save, and run the sample DQ plans as required.

- 2. Importing the \OmniGen folder into your workspace.
  - a. 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\OmniSupplier\**OmniGen** 

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

The project is loaded as *OmniGenForSupplier2-loadRamp*, which contains a subfolder called data, and two DQ plans (*01\_LoadRamp.plan* and *02.0\_LoadRampControl.plan*).

f. Double-click 01\_LoadRamp.plan or 02.0\_LoadRampControl.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.

# Loading 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 plan appears in the workspace area, as shown in the following image.



- Ctrl+Z Undo Redo Ctrl+Y riter 5 Ctrl+V Paste B Jdbc Writer ۵ Print Ctrl+P Show Grid Vriter 6 ÷ Snap to Grid Jdbc Writer 2 \* Vertical Auto Layout Jdbc Writer R Horizontal Auto Layout riter 7 Go to Step... Ctrl+G Find... Ctrl+F Jdbc Writer 3 Show Used Files... riter 8 Show Used Scorers... Jdbc Writer 4 Insert Step... Insert Jdbc Writer riter 9 Run Ctrl+F11 8 Generate Documentation... Save as Image... riter 10 ader og\_supplier\_account\_\_team\_r Jdbc Writer 11
- 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.

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

@ 01_LoadRamp.plan 😫								
								~
							- 1	
All Vig Supplier J Vig Supplier J								
Text-meder > >								
A calls are r blbs Wear 2 Test Perender blog are r								
og_soles_org_r Jobc Willer 2								
Run Results ×								
Plan(s) completed successfully.								
Only show this message when there are errors								
og_venov								
OK								
on supplier account r Mbc Writer 10	1							
Text Formation Automation Text Formation								
n non a sea a sea a sea a sea a sea a sea a 🦺 • <mark></mark>								
og suppler account team r 1dbc Writer 11							÷.,	
<						÷	>	
01 LoadRamp.plan								
I Properties 🚯 Run Results 🕒 Console 😫		ж	×	4	1k		P	9
<terminated> 01_LoadRamp.plan [Local DQS] C:\Java\jdk1.8.0_131\bin\javaw.exe (Jun 22, 2018, 7:41:02 AM)</terminated>								
22.06.2018 07:41:06 [INFO] Starting runtime								
22.06.2018 07:41:06 [INFO] Running runtime								
22.06.2018 07:41:21 [INFO] Stopping runtime								
22.06.2018 07:41:22 [INFO] Finished:								
22.06.2018 07:41:22 [INFO] Task completed successfully. Elapsed time: 0	0:0	00:	16					
<								

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.

**Note:** Due to the maximum Oracle column name length, the load plan JDBC Writer attribute to column name mapping must be modified to account for the shortened column names.

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

3. Double-click 02.0\_LoadRampContol.plan, as shown in the following image.

	0.0	1.000		mp	thiai		0.1	new.	LOB	JINDI	npco	entro	(pie	1 00																			
DQ Projects																																	
OmniGenForSupplier2-loadRamp			1		trippe	er																											
Folder Shortcuts					Text	File R	éadei																										
> 🗁 misc				_																													
amp			-			alicato	2																										
@ 01_LoadRamp.plan					Multi	nlicato																											
@ 02.0_LoadRampControl.plan			-	_																													
> 🗃 Tutorials				1			_	_																									
> 🗃 Tutorials2			-		/	-	-	-	-	_	_	-																					
> St My Computer						1		~		-	_	-	-		-	-	_																
Databases							È		-	-			-	_	_	-	_			-	-	_	_										
OmniGenDatabase							1			_	-			_	-	_		_	-	_				_	-	-	_						
Folder Shortcuts			-					1				-	-				-	-			_	-	-	_					-				
1 Servers					1-58	lesOr	9		2	2 Den	n			3 (	Contri	act			4	Inv	oice					5 5	upple	er			6 V	endo	00
Ø Documentation			4		Alter	Form	at 10		1	Uter	Forme	e I		Alt	er Fo	rmat	<pre></pre>		1	her i	Form	iat				Alter	r For	mat		÷.	Alte	r For	mat
							1						Т					Т												Т			
																														1			
			1																											1			
			-	-	1		1	-					-	×				-				5			-	1 de				-	l'ani		
			0	=	Mile	Writer		٥		abe i	Writer	-		10	i w	iber i	1			abe 1	Ninte	2		٥	Ξ	1/1/2	- Wirk	er o			100	- WITH	er o
																										-							

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.



You are prompted to save changes.

5. Click Yes.

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, as shown in the following image.

← → C A Not secure ht	ttps://ig10588v	win10.ibi.com	:9500/pages/work-orders						☆ <b>6</b> :
ØmniConsole ≡	Work	Orders							0 🛔
									1 - 9 of 9 🤟 🔾 🕹
0° Services	Work Orders	s							₹0
🖌 Configuration 👻		Туре	Subject	Batch Id	Source	Status	Result Reason	Start Date 🗸	End Date
Deployment	+ =-	BULK	SourceCodeSet	f0be648f-4d93-4115-a4ae-e970b6dec577		COMPLETE	PASS	2018-07-13 17:48:25.727	2018-07-13 17:48:37.757
m Processing -	+ =-	BULK	SourceCodeSet	25fd27ff-eaa8-4edd-a597-f9778f525b1a		COMPLETE	PASS	2018-07-13 17:48:19.780	2018-07-13 17:48:23.863
Work Orders	+=	BULK	SourceCodeSet	067c108c-26b4-46cd-bcfb-75a24a2325c4		COMPLETE	PASS	2018-07-13 17:48:15.003	2018-07-13 17:48:19.553
🗠 Measures	+=	BULK	Invoice	1		COMPLETE	PASS	2018-07-13 17:48:09:767	2018-07-13 17:48:14:797
A Ramp Control	+ =-	BULK	Supplier	1		ACTIVE		2018-07-13 17:48:01.997	
System Logs	+ =-	BULK	Contract	1		COMPLETE	PASS	2018-07-13 17:48:01.967	2018-07-13 17:48:09.390
* Testing	+ =-	BULK	Vendor_PO	1		ACTIVE		2018-07-13 17:48:01.297	
Consoles	+ =~	BULK	SalesOrg	1		COMPLETE	PASS	2018-07-13 17:48:01.247	2018-07-13 17:48:25.497
2 Operations	+ =~	BULK	ltem	1		ACTIVE		2018-07-13 17:48:00.840	

**Note:** It may take some time to process the data based on the system availability. When you refresh the screen, you should see that all work orders have been processed successfully.



# Understanding the Omni-Gen<sup>™</sup> for Supplier Data Model

This section provides reference information for the Omni-Gen<sup>™</sup> for Supplier data model.

#### In this chapter:

- Data Model Definition
- Data Quality Rules

# **Data Model Definition**

**Important:** This data model is used as the base for Supplier reporting built into WebFOCUS. Any modifications made to this model will impact any related reporting. Only additions should be made to this data model. Labels can be created in WebFOCUS to change any attribute name.

The Omni-Gen<sup>™</sup> for Supplier data model includes the following subjects:

- SUPPLIER
- SUPPLIER ALTERNATE ID
- SUPPLIER ITEM
- ADDRESS
- □ ADDRESS\_DUNS
- □ VENDOR PURCHASE ORDER
- □ VENDOR PURCHASE ORDER LINE
- ITEM
- ITEM ALTERNATE ID
- ❑ SALES ORGANIZATION
- **CONTRACT**
- CONTRACT LINE
- INVOICE

- □ INVOICE LINE
- □ ACCOUNT
- □ ACCOUNT\_TEAM
- CONTACT
- PHONE
- EMAIL



# SUPPLIER

The SUPPLIER subject identifies basic master data about suppliers such as name, trade prohibition indicator, ownership type, and social security number/tax identification number.

SUPPLIER subject attributes include:

Name	Description
first_name	The first name for a supplier party.
middle_name	The middle name for a supplier party.
last_name	The last name for a supplier party.
full_name	The full name for a vendor party, such as when a person is providing services as a supplier.

Name	Description
company_name	The legally identified name for a supplier organization.
dba_name	The doing business as name for a supplier organization.
trade_prohibi_ind	A Y/N indicator that identifies a trade prohibition for a given supplier such as statutory or administrative debarment.
primary_geographic_area	The primary geographic area (e.g., region, branch, store, sales region) assigned to the supplier.
credit_rating	The classification of a vendor into a range of credit ratings (for example, High Risk, Moderate Risk, or Low Risk).
vendor_pay_priority	The priority ranking for a given vendor in relation to their invoice payment. For example, High, Standard, or Low.
ownership_type	The classification of a vendor into an ownership type, such as women owned, minority owned, or Indian owned.
legal_class_type	The type of business, such as nonprofit, limited partnership, trust, or sole proprietor.
prim_sales_org	The primary sales organization assigned to a supplier.

#### SUPPLIER ALTERNATE ID

The SUPPLIER ALTERNATE ID subject identifies any alternate identifiers for the supplier.

SUPPLIER ALTERNATE ID subject attributes include:

Name	Description
supplier_iden_type	The type of alternate identifier assigned to the entire supplier, such as Commercial and Government Entity (CAGE), NATO Supply Code For Manufacturers (NSCM), or Data Universal Number System (DUNS). For an individual supplier, this could be their passport number or driver's license.
alt_identifier_id	The alternate identifier for the supplier.
issuing_country	The country issuing the alternate identifier.
supplier_iden_active	A Y/N indicator identifying whether the alternate identifier is active.

# SUPPLIER ITEM

The SUPPLIER ITEM subject maps the item identifier of the enterprise to the item identifier and item name of the supplier.

SUPPLIER ITEM subject attributes include:

Name	Description
item_id	The item identifier of the enterprise.
sup_item_id	The item identifier of the supplier for the item of the enterprise.
sup_item_name	The name for the item of the supplier.
supp_item_start_dt	The start date for the item of the supplier.
supp_item_end_dt	The end date for the item of the supplier.

# ADDRESS

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

ADDRESS	subiect	attributes	include:
, DDI(LOO	000000	accinoacoo	monaaoi

Name	Description
address_type	The type of address, such as corporate, sold to, ship to, or bill to.
primary_ind	A Y/N indicator identifying the primary address for a supplier.
address_status	The current status for an address.
attn_to_contact	The name of the attention to contact portion of the address.
street_address1	The first line of the street address portion of the address associated to a supplier party.
street_address2	The second line of the street address portion of the address associated to a supplier party.
city	The city portion of the address associated to a supplier party.
state_territory	The state or territory portion of the address associated to a supplier party.
county	The county portion of the address associated to a supplier party.
country	The country portion of the address associated to a supplier party.
postal_code	The zip or postal code portion of the address associated to a supplier party.
time_zone	The time zone associated with the address.

Name	Description
address_geo_area	The geographic area associated with the address. For example, the address may be located in a specific sales region.
latitude	The geospatial latitude for an address.
longitude	The geospatial longitude for an address.
CAGE_cd	Commercial and Governmental Entity code assigned to the location or address of the supplier.

#### ADDRESS\_DUNS

The ADDRESS\_DUNS subject identifies the DUNS numbers associated with an address. Note that the DUNS number can be assigned to the supplier, address, or address DUNS levels of the model.

ADDRESS\_DUNS subject attributes include:

Name	Description
CAGE_cd	Commercial and Governmental Entity code assigned to the DUNS number of the supplier.
DUNS_Number	The Dun and Bradstreet Data Universal numbering system number assigned to a supplier.

#### VENDOR PURCHASE ORDER

The VENDOR PURCHASE ORDER subject identifies general master data about the vendor purchase order such as bill to customer, sales order date, and order priority. Several attributes are available for comparison such as requested ship to address, ship date, order quantity, and committed/actuals. Metrics are available for the order fill rate and return rate.

VENDOR PURCHASE ORDER subject attributes include:

Name	Description
fulfill_supp_id	The unique identifier for the fulfilling supplier.
vendor_po_type	The type of purchase order such as standard, blanket, or standing.
vendor_po_date	The date the purchase order was placed.
req _st_street	The purchase orders requested ship to street address.
req_sh_city	The purchase orders requested ship to city.
req_sh_state	The purchase orders requested ship to state/territory.
req_sh_zip	The purchase orders requested ship to zip/postal code.
req_sh_country	The purchase orders requested ship to country.
rec_st_street	The actual ship to street address used for shipment of a purchase order's goods.
rec_st_city	The actual ship to city used for shipment of a purchase order's goods.
rec_st_state	The actual ship to state/territory used for shipment of a purchase order's goods.
rec_st_zip	The actual ship to zip/postal code used for shipment of a purchase order's goods.
rec_st_country	The actual ship to country used for shipment of a purchase order's goods.
req_ship_dt	The requested ship date of the purchase order.
cmt_ship_dt	The ship date committed to by the purchase order's vendor.
act_ship_dt	The actual date that goods shipped for the purchase order.
order_priority	The order priority assigned to a purchase order.
order_status	The status assigned to a purchase order.

Name	Description
sold_sales_org	The sales organization that will be responsible for this purchase.
related_contract	The contract that covers all purchases made under a vendor purchase order.

#### **VENDOR PURCHASE ORDER LINE**

The VENDOR PURCHASE ORDER LINE identifies the line items of the purchase order. This details the item ordered, quantity, delivery date requested, and expected unit price. There are several attributes provided for reporting, such as being able to compare requested, committed, and actual delivery dates, delivered versus returned item quantities, and expected, invoiced, and paid amounts.

VENDOR PURCHASE ORDER LINE sub	bject attributes include:
--------------------------------	---------------------------

Name	Description
requested_item_id	The item requested on a purchase order line.
requested_item_qty	The requested quantity of an item.
committed_item_id	The item committed to be provided on a purchase order. This can differ from the requested product.
committed_item_qty	The committed quantity of an item.
requested_delivery_dt	The date requested for delivery.
committed_delivery_dt	The committed date for delivery of the enterprise.
actual_delivery_dt	The actual date of the delivery.
delivered_item_id	The item actually delivered on a purchase order line. This can differ from the committed item.
delivered_item_qty	The delivered quantity of an item.

Name	Description
returned_item_id	The returned item applied against this purchase order line. Depending on the return policy of the enterprise, this item can differ from the delivered item.
returned_item_qty	The returned quantity of an item.
po_ln_uom	The unit of measure for quantities on the purchase order line.
unit_pri_amt	The unit price expected for the requested item.
invoiced_unit_pri_amt	The invoiced unit price amount.
paid_unit_amt	The amount actually paid per unit for an item.
r_sales_org_id	The sales organization responsible for the purchase order line.
vendor_po_ln_dt	The creation date for the purchase order line.
po_ln_status	The status of the purchase order line.
po_In_contract	The contract that covers the item on the purchase order line.

# ITEM

The ITEM table identifies the products and/or services that can be provided by a supplier.

ITEM subject attributes include:

Name	Description
item_name	The type of phone number, such as home, office, FAX, or mobile.
item_short_desc	The short description for an item.
item_long_desc	The long description for an item.

Name	Description
key_item_ind	A Yes/No flag identifying whether an item is included in the major products tracked by the company.
item_base_uom	The standard/base unit of measure for an item. For a service, this will identify the billing unit of measure such as hour, day, or per job.
item_base_cost	The base cost amount for an item.
item_base_price	The base price for a base unit of measure of an item
item_sku	The stock keeping unit for an item.
item_barcode	The barcode for an item.
item_gtin	The global trade item number for an item.
item_start_dt	The date that an item became effective.
item_end_dt	The end date for an item.
item_eol_dt	The end of life date for an item.
item_type	The type of item such as Product or Service. Groupings or hierarchy levels below this are maintained in Omni Grouping.

# **ITEM ALTERNATE ID**

The ITEM ALTERNATE ID table identifies any alternate identifiers for the item.

ITEM ALTERNATE ID subject attributes include:

Name	Description
item_alt_id_type	The type of identifier such a global product identifier, CAS number, or EINECS number.
item_alt_id_value	The alternate identifier value of the item.

Name	Description
item_alt_id_active_ind	A Y/N indicator identifying whether the alternate ID of the item is active

### SALES ORG

The SALES ORG table identifies any level sales organization of the enterprise such as a division, branch, or region.

SALES ORG subject attributes include:

Name	Description
sales_org_name	The name for the sales organization.
sales_org_desc	The description of the sales organization.
sales_org_start_dt	The start date for a sales organization.
sales_org_end_dt	The end date for a sales organization.
primary_geo_area	The primary geographical area assigned to a sales organization.

# CONTRACT

The CONTRACT table identifies any contract or agreement that is related to purchasing of items and/or services.

CONTRACT subject attributes include:

Name	Description
contract_signed_dt	The date on which a contract was signed.
contract_st_dt	The start date for a contract.
contract_end_dt	The actual end date for a contract.
contract_renew_dt	The next renewal date for a contract.

Name	Description
expected_expire_dt	The estimated expiration date for a contract.
prim_supplier	The primary supplier providing products or services through the contract.
contract_status	The current status of a contract.
contract_type	The type of contract such as cooperative merchandising agreement, subscription, warranty, service contract, or purchasing agreement.

#### CONTRACT LINE

The CONTRACT LINE table identifies each of the line items on a contract. The line item level identifies the items or services covered by the contract and any associated minimum, maximum, or mandatory quantities to be purchased.

CONTRACT LINE attributes include:

Name	Description
contract_In_st_dt	The start date for a contract line.
contract_In_end_dt	The end date for a contract line.
contract_item_id	The identifier of an enterprise for the item covered on a contract line.
contract_item_price	The expected price for a single unit of measure of the ordered item.
contract_item_uom	The unit of measure for the quantities of the item. For a Service, this could be the per hour, day, or job unit of measure for example.
min_purchase_qty	The minimum purchase quantity for a contract line item.
max_purchase_qty	The maximum purchase quantity for a contract line item.

Name	Description
item_list_price	The list price for an item at the time of the contract line creation.
list_price_discount_percent	The discount percentage associated with a contract line.
term_text	The textual description of the terms of the contract line such as Net 30, 2/10 Net 30, EOM, or 15 MFI.
contract_sla_text	The textual description of the service level agreement for the contract such as meantime to recover, turnaround time or first call resolution time.
contract_In_status	The current status of the contract line.
mandatory_purchase_qty	The mandatory amount of an item that is required to be purchased during the effective period of the contract line.

# INVOICE

The INVOICE table identifies any invoice received from a supplier. Any overall charges, such as shipping and handling charges, can be tracked at this header level of the invoice along with any overall discount that is applied to the entire invoice.

INVOICE attributes include:

Name	Description
invoice_dt	The date on which an invoice was issued.
invoice_contract_id	The contract that covers the items on an invoice.
invoice_status	The current status of an invoice.
invoice_supplier	The supplier submitting the invoice.
invoice_type	The type of invoice such as Draft, Prepayment, or Standard.
invoice_shipment_amt	The amount charged for shipment costs related to the invoice.

Name	Description
invoice_handling_amt	The amount charged for handling costs related to the invoice.
invoice_discount_amt	The discount amount allowed for an entire invoice.
invoice_level_payment_amt	Any payment amount that was posted to the entire invoice. Payments can also be posted at the line item level.
invoice_related po	The vendor purchase order related to an invoice.

#### **INVOICE LINE**

The INVOICE LINE table identifies each of the line items on an invoice. The line item level identifies the items or services covered by the invoice and the associated quantities and prices. It can also be used to track and compare the billed, adjustments, discounts, and actual payment amounts.

INVOICE LINE attributes include:

Name	Description
invoice_item_id	The item that is billed for on the invoice line.
invoice_item _qty	The quantity of an item that is covered by an invoice line.
invoice_item_uom	The unit of measure to be used for the invoice line quantity.
invoice_item_price	The price per unit to be used for the invoice line quantity.
item_list_price	The list price effective for an item on an invoice line.
invoice_item_adjust_amt	The amount of adjustments taken against an invoice line.
invoice_item_discount_amt	The amount of discounts taken against an invoice line.
invoice_item_paid_amt	The amount paid against an invoice line.
invoice_adjust_reason	The reason that an adjustment was taken against the invoice line.

Name	Description
invoice_discount_reason	The reason that a discount was taken against an invoice line.
invoice_In_status	The status of the invoice line.
invoice_In_related_po	The vendor purchase order related directly to an invoice line.
invoice_In_contract	The contract whose terms and conditions cover the invoice line item.

## ACCOUNT

The ACCOUNT table identifies any financial accounts associated with the supplier. This part of the model can be used to track dates, credit limits, and credit ratings associated with each account.

ACCOUNT attributes include:

Name	Description
account_type	The item that is billed for on the invoice line.
account_name	The quantity of an item that is covered by an invoice line.
account_open_dt	The unit of measure to be used for the invoice line quantity.
account_renew_dt	The price per unit to be used for the invoice line quantity.
account_close_dt	The list price effective for an item on an invoice line.
credit_limitt	The amount of adjustments taken against an invoice line.
credit_rating	The amount of discounts taken against an invoice line.
credit_terms	The amount paid against an invoice line.

# ACCOUNT TEAM

The ACCOUNT TEAM table identifies any members of the enterprise which are assigned to the supplier.

ACCOUNT TEAM attributes include:

Name	Description
current_ind	A Y/N indicator identifying whether this team is the most current one assigned.
credit_rep	The person assigned as credit representative for the supplier.
direct_sales_rep	The person assigned as the direct sales representative for the supplier.
account_exec	The person assigned as the account executive for the supplier.
account_team_start_dt	The start date for the account team assignment.
account_team_end_dt	The end date for the account team assignment.

# CONTACT

The CONTACT table identifies any significant contacts associated with the supplier. The person name and primary contact type can be tracked.

CONTACT attributes include:

Name	Description
primary_ind	A Y/N indicator identifying whether this is the primary contact for the supplier.
contact_type	The primary type associated to the contact such as buyer, accounts receivable, or delivery receipt.
title	The title for the contact such as Mr., Dr., Mrs., or Ms.

Name	Description
first_name	The first name of the contact
middle_name	The middle name of the contact.
last_name	The last name of the contact.
full_name	The full name of the contact. This is usually a combination of the first name, middle name and last name.

#### PHONE

The PHONE subject identifies the phone number for the supplier such as home, office, FAX, or mobile.

Name	Description
primary_ind	A Y/N indicator identifying the primary phone number for a supplier.
active_ind	A Y/N indicator identifying the phone number is currently active.
phone_type	The type of phone number, such as home, office, FAX, or mobile.
phone_number	The actual digits of the phone number.

PHONE subject attributes include:

#### EMAIL

The EMAIL subject identifies the email address for the supplier, such as personal or business. EMAIL subject attributes include:

unconfirmed, opt-in, or opt-out.

The extension portion of the phone number.

The current status of the phone number such as

extension

comm\_status

Name	Description
primary_ind	A Y/N indicator identifying whether this is the primary email for a supplier.
email_type	The actual value of the email address.
comm_status	The type of email address, such as personal or business.
email_address	The status of an email address such as unconfirmed, opt- in, or opt-out.

#### **Reference Tables**

Omni-Gen<sup>™</sup> for Supplier also includes the following reference tables.

These reference tables contain the acceptable list of values for the codes that appear on the main tables in the data model. Each reference table has sample values included.

- ❑ Account types. Identifies the acceptable values for the status of an account such as unconfirmed, credit hold, active, or closed.
- Address Status types. Identifies the acceptable values for the status of an address such as unconfirmed, active, or inactive.
- ❑ Address types. Identifies the acceptable values for the supplier's address type such as sold to, ship to, bill to, and corporate.
- □ Alternate Item ID types. Identifies the acceptable values for the type of alternate item identifier such as Global Product ID.
- □ **Comm Status types.** Identifies the acceptable values for the status of an email or phone number such as unconfirmed, opt-in, or opt-out.
- □ **Contact Types.** Identifies the acceptable values for the supplier's contacts such as buyer, accounts receivable, or delivery receipt.
- □ **Contract Types.** Identifies the acceptable values for the types of contracts such as the cooperative merchandising agreement or purchasing agreement.
- □ **Contract Status types.** Identifies the acceptable values for the status of a contract such as pending, open, or closed.
- □ **Credit Rating types.** Identifies the acceptable values for the supplier's credit rating such as Prime, High, Speculative, Default Imminent, or In Default.

- **Email Types.** Identifies the acceptable values for the supplier's email type such a home, cell, or business.
- Geographic Area types. Identifies the acceptable values for the supplier's geographic area or region as derived from their address such as the Southern, Western, Eastern, or Northern.
- □ Invoice Adjustment Reason types. Identifies the acceptable values for the type of an adjustment that was taken against an invoice.
- □ Invoice Discount Reason types. Identifies the acceptable values for the type of a discount taken against an invoice.
- □ **Invoice Status types.** Identifies the acceptable values for the status of an invoice such as received, open, closed, or approved for payment.
- □ **Invoice types.** Identifies the acceptable values for the types of invoice such as Standard, Prepayment, or Draft.
- Item types. Identifies the acceptable values for the types of an item such as products or services.
- □ Legal Class types. Identifies the acceptable values for the legal classification of the supplier such as non-profit, trust, or sole proprietor.
- ❑ Phone types. Identifies the acceptable values for the supplier's phone types such as home or business.
- □ Order Line Status types. Identifies the acceptable values for the status of a purchase order line such as open, closed, or partially shipped.
- □ Order Status types. Identifies the acceptable values for the status of a purchase order such as open, closed or partially shipped.
- □ **Order types.** Identifies the acceptable values for a purchase order's types such as Blanket, Standing, or Standard.
- □ Order Priority types. Identifies the acceptable values for the supplier's order priority such as Top 10, Customer Expedited, High, Standard, or Low.
- **Ownership types.** Identifies the acceptable values for the supplier's ownership type such as woman, minority, or Indian owned.
- □ **Supplier Identifier types.** Identifies the acceptable values for the type of alternate identifiers assigned to a supplier such as active or inactive.

- ❑ Unit of Measure types. Identifies the acceptable values for units of measure such as tons, each, carton, or case.
- ❑ Vendor's Payment Priority types. Identifies the acceptable values for the supplier's assigned payment priority such as High, Standard, or Low.

#### **Data Quality Rules**

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

#### Cleansing

Cleanse Address:

Verify and standardize address subject.

Prerequisites:

Loqate for address cleansing and verification.

Tags:

- ERR\_NO\_ZIP\_ON\_USA\_ADDRESS Address does not have a ZIP code.
- ERR\_ADDRESS\_INVALID Address is invalid based on Loqate address verification and standardization.
- Cleanse Name:

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

Prerequisites:

None

Tags:

- ERR\_NAME\_BLANK Full name attribute is blank.
- **ERR\_LAST\_NAME\_BLANK** Last name attribute is blank.
- Cleanse SSN:

Verify SSN conforms to US SSN standards based on Social Security Administration standards.

Prerequisites:

None

Tags:

- □ INF\_SSN\_NULL SSN is blank.
- ERR\_SSN\_ALL\_ZEROS\_IN\_DIGIT\_GROUP One or more of the digit groups contains all zeros (0), where a digit group is defined as each of the 3 unique segments of a SSN.
- □ ERR\_SSN\_UNACCEPTED\_NUMBER
- ❑ WRN\_SSN\_ZEROS\_ADDED Zeros were added to be beginning of the SSN to make it a valid length.
- ERR\_SSN\_USED\_FOR\_ADVERTISMENT SSN was used during advertising campaigns and is not valid.
- ERR\_SSN\_NOT\_A\_NUMBER SSN contains nonnumeric values.
- ERR\_SSN\_NO\_9\_DIGIT SSN is not 9 digits in length, after removing dashes.
- Cleanse Email:

Verify email conforms to minimum standards and is not blacklisted.

Prerequisites:

None

Tags:

- WRN\_EMAIL\_BLACKLISTED Email included in email black list.
- ERR\_INVALID\_EMAIL\_ADDR Email address does not conform to a minimum of <value>@<value>.<value>
- Cleanse Phone:

Verify phone numbers follow US phone number length and area code is valid.

Prerequisites:

None

Tags:

WRN\_UNKNOWN\_AREA\_CODE – Phone number contains an unknown area code.

- □ WRN\_SHORT\_PHONE Phone number is 10 digits in length.
- □ Cleanse Purchase Order (PO) Addresses:

Verify PO addresses are valid.

Prerequisites:

□ Loqate for address cleansing and verification.

Tags:

- ERR\_SHIP\_TO\_NO\_ZIP\_ON\_USA\_ADDRESS Ship To address does not have Zip Code
- ERR\_SHIP\_TO\_ADDRESS\_INVALID Ship To address invalid based on Loqate address verification and standardization
- ERR\_REQUESTED\_NO\_ZIP\_ON\_USA\_ADDRESS Requested address does not have Zip Code
- ERR\_REQUESTED\_ADDRESS\_INVALID Requested address invalid based on Loqate address verification and standardization
- ERR\_FULFILLING\_NO\_ZIP\_ON\_USA\_ADDRESS Fulfilling address does not have Zip Code
- ERR\_FULFILLING\_ADDRESS\_INVALID Fulfilling address invalid based on Loqate address verification and standardization

#### Matching

Matching is performed based on the following attributes:

SSN

- □ Full Name and Name Parts
- 🖵 email
- Phone Number

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 150, but less than 200.

Records that are considered a potential match have a matching ticket created. This allows a data steward to manually review the low-quality match for accuracy.

#### Merging

Merging is performed differently based on the subject, depending on the content of each subject.

- □ Supplier:
  - □ Most recent supplier record selected.
- Phone:
  - □ All unique phone numbers for each phone number type.
- Address:
  - □ All unique addresses for each address type.
- Email:
  - All unique email addresses for each email address type.
- Purchase Order:
  - □ All purchase orders. No merge is performed.

#### Remediation

Remediation creates two types of tickets (Cleansing and Matching).

Cleansing tickets are created whenever the tag begins with "ERR\_". For a complete list of potential tags generated, see *Cleansing* on page 100.

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 102.

# 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.
- □ Integration 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	🗩 Con	figuration: Runtime			4
og Services	Runtime	Data Quality Runtime Server Remediation	n Command Line		
Configuration	Runtime				
Runtime		Setting	Value	Description	
Databases	8	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		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.	
Ocnsoles		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**

**Note:** Synchonization is not required when loading the *MDATA.xml* file, which is provided by the Omni-Gen<sup>TM</sup> for Supplier installer (version 3.4.2.1) for any new installation of the product.

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.

← → C 🛈 🖡	\$	* 0 🕸 🛛 🔦			G				
360 Viewer	Remediation	Data Quality Monitor	Data Dictionary	Workbench	Grouping	Administration		9392 AN	san dan sa
Sources	iews Options	Tables Table Order	Settings Exce	ptions					
E Sources Lis	st							Ø	Help
Nama						ation			
Name	UN				A	ction			
IIMCSource	http	://vm40834-1:8082/OmniD	omain/v2/data.svc/		s	ync Valida	te   Histo	iry	

# 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	Options	Tables	Table Order	Settings	Exceptions			
E Source	s List								Help
Synchroni	zation statu	s: Searchin	g for Colum	nns to edit custo	mercomm_c	hanMaster			
Name		Uri					Action		
IIMCSource	e	http	://vm40834	-1:8082/OmniD	omain/v2/da	ta.svc/	Sync O	Validate   His	story

# 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 Supervisor, gro	up.one, System Administrator) Logout	0
Sources Views Option	ns Tables Table Order	Settings Exceptions		
E Sources List + New S	Source		0	Help
Scan completed. Updates to 4 subject table(s) to be dropp 4 subject table(s) to be added to 18 column(s) to be added to 72 column(s) to be dropped f 17 subject table(s) to be add Role(d) to be assigned to use Domain(s) to be added to the	take effect found ved found d found ind found ed found ers found <b>Details ∂Edit</b> ≠ policy(-les) found <b>Details ∂Ed</b>	Sit		

# **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.

Remediation	Workbench	Administration		super_a (Data Supervisor, gr	oup.one, System Ad	ministrator)	Logout	0
Sources	Views Optio	ns Tables Table	Order Settings	Exceptions				
E Source:	s List + New	Source					0 Help	
Scan.com 4 subject 1 4 subject 1 18 column 17 subject Role(s) 10 0 domain domain domain domain domain domain domain	pleted. Updates to able(s) to be dropped able(s) to be added to (s) to be added to (s) to be added to (s) to be added to be asstyned to us customerAddress CustomerAddress CustomerAddress CustomerAddress CustomerAddress CustomerAddress CustomerAddress SourceCodeRetal SourceCodeRetal SourceCodeRetal	take effect found ped found d found of ound ed found ed found es found <b>Details Fed</b> <i>CoustomerAddress</i> , Master, domain.Custor level3Master, domain.CustomerPhon main.SourceCode, don ion, domain.SourceCode dard	t nerAddresslevel3, main CustomerMaster, eMaster, domain.Perso nain.SourceCodeMap, teSet,	n,	Column	Actio	n ÷	
WfCase						edited	j	

#### 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.

Updating policies							۵
New Domains to add							
Customer x CustomerAddress x CustomerAddressMaster x CustomerAddresslevel3 x CustomerAddresslevel3Master x CustomerAddresslevel3Master x						×	
CustomerAddresslevel3level4Master × CustomerMaster × CustomerPhot	ne × CustomerPh	oneMaster × Pers	on × Person	Master ×	SourceCode ×	SourceCodeMap ×	•
SourceCodeRelation × SourceCodeSet × SourceCodeStandard ×							
New Domains to add Domain roles							-
Customer	Data_Steward ×	Data_Supervisor ×	System_Ad	tministrator ×	User ×		•
CustomerAddress	Data_Steward ×	Data_Supervisor ×	System_Ad	ministrator ×	User ×		•
CustomerAddressMaster	Data_Steward ×	Data_Supervisor ×	System_Ad	iministrator ×	User ×		
CustomerAddresslevel3	Data_Steward ×	Data_Supervisor ×	System_Ad	iministrator ×	User ×		•
CustomerAddresslevel3Master	Data_Steward ×	Data_Supervisor ×	System_Ad	iministrator ×	User ×		•
CustomerAddresslevel3level4	Data_Steward ×	Data_Supervisor ×	System_Ad	iministrator ×	User ×		•
CustomerAddresslevel3level4Master	Data_Steward ×	Data_Supervisor ×	System_Ad	ministrator ×	User ×		
Save Cancel							

#### 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	on the second	super	_a (Data Supervisor, group.one, Syster
Sources	Views Option	ns Tables	Table Order	Settings	Exceptions
E Source	s List 🕂 New S	Source			
Sca <mark>n com</mark> 4 subject t 4 subject t	pleted. Updates to able(s) to be dropp able(s) to be edite	take effect foun bed found d found	d		
18 column 72 column 17 subject	(S) to be added for (s) to be dropped f table(s) to be add	und found ed found			
Role(s) to Domain(s)	be assigned to use to be added to the	ers found Detail e policy(-ies) fou	s & Edit ind Details & Ed	lit	
Loading ( Apply Cha	nges Cancel	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 Remediati	ion Data Quality Monitor	Workbench	Administration	super_a (Data Supervisor, grou	up.one, System Adı			
Sources Views Optic	ons Tables Table Order	Settings E	kceptions					
E Sources List	hî				🛛 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/OmniDomai	n/v2/data.svc/	Sync   Validate   Hi	istory			

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.



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# iWay

<sup>/</sup> Omni-Gen<sup>™</sup> for Supplier User's Guide

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