



Omni Governance Console Administration User's Guide

Version 3.2 and Higher

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Contents

This documentation describes how to perform administration tasks for Omni Governance Console (OGC), which provides a web-based Administration console that you can use to configure the application.

How This Manual Is Organized

This manual includes the following chapters:

	Chapter/Appendix	Contents
1	Introducing the Administration Console	Introduces the Administration console, which is a component of the Omni Governance Console (OGC).
2	Configuring Application Components	Describes how to configure Omni Governance Console (OGC) application components using the Administration console.
A	Enhanced Access Security: Column-Based and Row- Based	Describes how to configure column-based access security and row-based access security in the Omni Governance Console (OGC).
В	Configuring Single Sign-On	Describes how to configure Single Sign-On (SSO) for Omni Governance Console (OGC).
С	Using MData, Synch, and WSO2 Administration	Describes the WSO2/MData Synchronization (Mdata-Synch) feature of reducing the configuration work of the administrator when a new subject arrives into the Omni-Gen Server (OGS) model and database, and when data structures are altered (for example, a type or name of a column has been changed).
D	Configuring Omni Governance Console Roles From LDAP (Active Directory)	Describes how to configure a WSO2 based LDAP connection and User Store which will eliminate the redundant data entry, and allow the Subject per Userid Authorizations to be obtained from the enterprise LDAP Server (Active Directory).
E	Custom Logos (Application Branding)	Describes how to apply branding or custom logos to your Omni Governance Console (OGC) application.

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	
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.

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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.

Platform	
Operating System	
OS Version	
JVM Vendor	
JVM Version	

The following tables list the environment information our consultants require.

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

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

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

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

Introducing the Administration Console

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

In this chapter:

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

Overview

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

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

Key Features

The OGC Administration console provides a web-based interface to view and edit OGC configuration details (metadata).

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

- Uiew and edit sources.
- View and edit views, create new views.
- Uiew and edit options, create new options for table, view or source.
- Uiew and edit tables, create new tables.
- View and edit columns.
- View and edit links.
- Uiew and edit Table Order.

□ View and edit settings, create new settings.

Download and upload configuration (metadata.xml) files.

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

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

Accessing the Administration Console

Ensure that the user who is responsible for managing OGC metadata, modifying application options, and display definitions has the *System Administrator* role in the WSO2 Identity Server user store repository.

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

https://ogcHostName:8443

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

Understanding the Layout and Structure of the Administration Console

All pages within the OGC Administration console are unified through a common page layout, as shown in the following image.

Name \$	Source 0	Entity Type	
Patient Masters	OmniSource	PatientMaster	
Patients	OmniSource	Patient	
Person Address Masters	OmniSource	PersonAddressMaster	
Person Name Masters	OmniSource	PersonNameMaster	
Person Addresses	OmniSource	PersonAddress	
Person Names	OmniSource	PersonName	
Providers	OmniSource	Provider	
Provider Masters	OmniSource	ProviderMaster	
Person Identifier Masters	OmniSource	PersonIdentifierMaster	
Person Contact Method Masters	OmniSource	PersonContactMethodMaster	

Each page contains the following areas:

- 1. Components menu
- 2. Actions menu
- 3. Help menu
- 4. Content area
- 5. Footer

Components Menu

The components menu includes the following tabs:

Sources

Views

	Options
	Tables
	Table Order
	Settings
	Exceptions
The	e following image shows the components menu with the Tables tab selected.

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

Actions Menu

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

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

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

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



Help Menu

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

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

I Help
Views
Views enable you to present data entities as grids, customizing their look and feel.
alco

Content Area

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

Detailed descriptions of different pages are provided throughout this documentation.

Footer

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

🖷 Home	📥 Download Metadata	O Back to top
Contacts	📩 Upload Metadata	



Configuring Application Components

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

In this chapter:

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

Sources

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

Source List

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

Sources	Views	5	Options	Tables	Table Order	Settings	Exceptions			
E Source	List	+	New Source	e						O Help
Name		0	Uri					¢	Action	

Source Validation

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



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

Sources Views	Options Tables Table Sets Settings Exceptions	
E Source List	+ New Source	Help
Successfully updat	ed source OmniSource ; added 42, removed 28 and edited 0 columns; 0 tables re	moved
Name	Un	Action
OmelCause	http://wm/0834.2 projects local:0000/0mpiDomain/v2/data.svc	Validate I History

Source History

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

ource Update Events				
Date	Table	View	Column	Action
2014-03-26 14:53:07.12	Wf Tickets	groupedGridView	remedyRefs	edited
014-03-26 14:53:07.069	Wf Tickets	advancedSearchView	remedyRefs	edited
014-03-26 14:53:07.017	Wf Tickets	fullinfoView	remedyRefs	edited
014-03-26 14:53:06.966	Wf Cases	groupedGridView	events	edited
014-03-26 14 53 06 915	Wf Cases	groupedGridView	tickets	edited
014-03-26 14:53:06.864	Wf Cases	groupedGridView	ssn	edited
014-03-26 14:53:06.813	Wf Cases	manOverridePopupView	ssn	edited
014-03-26 14:53:06.756	Wf Cases	casePropertiesView	ssn	edited
014-03-26 14 53 06 704	Wf Cases	casesPopupView	ssn	edited
014-03-26 14:53:06:653	Wf Cases	breadcrumbView	ssn	edited

Show Source

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

Source name

🖵 Uri

□ Tables the source contains

□ Source configuration

	Sources Views Options	Tables Table Order Settings Exceptions	
	Edit Sources List	ce 😭 Delete	O Help
1	Name	OmniSource	
2	Uri	http://vm40834-1.projects.local:8082/OmniDomain/v2/data.svc/	
3	Tables	Patient Masters Organizational Unit Identifiers Organization Names Organizational Unit Contact Method Masters Provider Assignments Provider License Monitors Facility Relation Masters Facility Location Contact Method Masters Job Masters Provider Interpreter Privileges Facility Location Relation Masters Provider Interpreter Privileges Facility Location Relation Masters Provider Interpreter Strateges Facility Address Masters Organization Address Masters Organizations Person Names Facility Identifier Masters Patient Medical Record Number Masters Provider Insurances Organization Locatifices	
4	Source configuration	orDelimiter	

Editing a Source

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

Sources Views O	ptions Tables Table Order Settings Exception	ons
Source List + Ne	w Source 🕜 Edit Source 🗎 🗎 Delete	O Help
Name	OmniSource	
Uri	http://vm40834-2.projects.local:9	
Service URL	http://vm40834-2.projects.local:9 Workflow endpoint	
Tables	 Person Name Masters Organization Names Facility Address Masters Facility Masters Provider Practice License Masters Patient Masters Organization Contact Methods Organization Contact Method Masters Facility Location Addresss Organization Name Masters Facility Location Identifiers Wf Events Include Rules 	

Deleting a Source

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

1	Delete Item		0
:e	Are you sure?		
Sc		Delete	Cancel

Views

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

masterid /	× <	>> addressLine2	
firstName #			
in straine y	×	addressLine3#	
middleName 🖋	×	addressLine4#	
lastName /	×	addressUsageComment /	
dateOfBirth /	×	adoptedCode 🖋	
addressLine1	×	adoptedCodeDescription <i>P</i>	
city J	×	adoptedCodeld a	
stateProvinceCodeDescription <i>3</i>	×	ambulatoryStatusCode 🖋	
postalCode 🖋	×	ambulatoryStatusCodeDescription /	
omniModifiedDate /	×	ambulatoryStatusCodeld 🖋	

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

JEMID *	First Name ≬	Middle Name 🕴	Last Name 🍦	Date Of Birth	Address 0	City 0	State/Province	Postal Code	Omni Modified Date
10	Dylan	Ρ	Morgan	1988-07- 04T00:00:00	126 E MAIN ST	ELKTON	Maryland	21921-5907	2014-05-20T03:49:06
12	Audrey	Patricia	Myers	1945-12- 09T00:00:00	4123 ROWLAND AVE	EL MONTE	CA	91731-1008	2014-05-20T03:49:08
14	Shawn	E	Henry	1942-12- 07T00:00:00	9000 Middlebelt Rd	Romulus	Michigan	48174	2014-05-20T03:49:08
16	Terry	A	Frost	1962-02- 14T00:00:00	235 Prospect Avenue	Grand Rapids	Michigan	49503	2014-05-20T03:49:10
18	Kristopher		Tanaka	1934-07- 07T00:00:00	745 Highway Terrace	Sqawk Valley	Utah	34322	2014-05-20T03:49:15
2	Emily	Sophia	Bickenbach	1975-10- 10T00:00:00	24576 BROCKWOOD HILLS RD	Athens	Illinois	62613	2014-05-19T15:10:52
4				1965-02- 21T00:00:00					2014-05-19T15:10:54
6	Emily	Sophia	Biers-Knutson	1975-10- 10T00:00:00	24577 BROCKWOOD HILLS RD	Athens	Illinois	62613	2014-05-19T15:11:12
8	Ryan	z	Carter	1988-07- 04T00:00:00	5719 BANDERA ST	LOS ANGELES	California	90058-3811	2014-05-20T03:49.06

View List

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

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

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

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

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

Views

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

Show View

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

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

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

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

Creating a New View

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

E View List + New View		 Help
Title		
Name		
Has Columns	ON	
Exclude All	OFF	
Has Column Groups	OFF	
Has Column Sub Groups	OFF	
Has Column Sections	OFF	
Has Links	OFF	
	Create Reset	

Editing a View

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

View List + New	/iew / Edit View 🖹 Delete	 Help
Title	Grid Result View	
Name	gridResultView	
Has Columns	ON	
Exclude All	ON	
Has Column Groups	OFF	
ias Column Sub Groups	OFF	
Has Column Sections	OFF	
Has Links	OFF	

Options

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

- Configure a name for single table record.
- Show or hide Info tabs.
- Switch logging on or off.
- Define a title for Default Filters.

Adding of multiselect switchers to My/All Filter cases.

Option List

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

E Options List + New Option O Help						
†	Name \$	\$	туре ‡	Default Value	Path Type	Path Name
Record Name	tableRecordName	Name for single table record	String	Record	table	
info Tab Indicator	isInfoTab	Indicates whether a table is an information kind of tab	Boolean	false	table	
Is Logged	IsLogged	Log events from this table	Boolean	true	table	
DefaultFilterStateMyCases	DefaultFilterStateMyCases	DefaultFilterStateMyCases	String		view	myCasesFilterView
DefaultFilterStateAllCases	DefaultFilterStateAllCases	DefaultFilterStateAllCases	String		view	allCasesFilterView
SwitcherValuesStateAllCases	SwitcherValuesStateAllCases	adds possibility using of multiselect switchers for configuring of filtering items on All Cases	String		view	allCasesFilter√lew
SwitcherValuesStateMyCases	SwitcherValuesStateMyCases	adds possibility using of multiselect switchers for configuring of filtering items on My cases	String		view	myCasesFilterViev

Show Option

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

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

□ Name of view (if required)

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

Creating a New Option

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

Title		
Name		
Description		
Туре	•	
Path Type	•	

Editing an Option

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

Title	Record Name	
Name	tableRecordName	
Description	Name for single table record	
Туре	String	
Default Value	Record	
Path Type	table	
Path Name		

Note that the Name and Type fields cannot be modified.

Tables

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

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

Table List + New Table		 Help
Name	Source	Entity Type
Patient Masters	OmniSource	PatientMaster
Patients	OmniSource	Patient
Person Address Masters	OmniSource	PersonAddressMaster
Person Name Masters	OmniSource	PersonNameMaster
Person Addresses	OmniSource	PersonAddress
Person Names	OmniSource	PersonName
Providers	OmniSource	Provider
Provider Masters	OmniSource	ProviderMaster
Person Identifier Masters	OmniSource	PersonidentifierMaster
Person Contact Method Masters	OmniSource	PersonContactMethodMaster

Show Table

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

EMID	First Name	Middle Name	Last Name	Date Of Birth	Address	City	State/Province	Postal Code
0	Ava	F	Miller					
12	Emily	G	Davis					
14	Abigail	н	Garcia					
16	Jayden	J	Wilson					
18	William	1	Rodriguez					
2	Olivia	D	Brown					
20	Madison	L	Anderson					
22	Noah	к	Martinez					
24	Michael	м	Taylor					
26	Alexander	0	Hernandez					

Creating a New Table

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

The New Table page contains the following sections:

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

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

Source	OmniSource •				
Table	Column				
Name	Columns				
Record Name	Record	Name for single table reco	ord s an information kind of tab		
	Included:		Excluded		_
Add view *					
	Included:		Excluded:		_
	Included:	×	Excluded:	ila	
	Included: calcDescription	×	Excluded:	ila IColumn	
	Included: calcDescription	×	Excluded: calcForm calculated dataType	ila SColumn	
	Included:	x	Excluded: Calc Formut Calculated dataType displayNa	ila IColumn me	
	Included:	×	Excluded: Calc Formula Calculated data Type displayNa foreignKe	ula IColumn me Y	
60	Included: calcDescription	×	Excluded calcEormu calculated dataType displayNa foreignKe id	ila iColumn me y	
50	Included: calcDescription	×	Excluded CalcEormu calculated dataType displayNa foreignKe id longDesc	ila IColumn me y	
	Included: calcDescription	×	Excluded: CalcEormu Calculated dataType displayNa foreignKe id longDesc name	ila ICOlumn me Y	
	Included: calcDescription	×	Excluded: calcEormu calcLeormu calculated dataType displayNa foreignKe id longDesc name primaryKe	ila SColumn me y	
2	Included: calcDescription	×	Excluded: calcFormu calculated dataType displayNa foreignKe id longDesc name primaryKe shortDesc	ila SCOlumn me y y	

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

Groups allow administrators to unite columns.

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

A section is an additional grouping in the group.

Group	
Add Group	

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

Included:	
Demographics	<u> </u>
■■ Name	×
firstName 🖋	×
lastName 🖋	×
==Name	2 ×
motherMaidenName 🖋	×
middleName 🖋	×
maritalStatusCodeDescription 🖋	×
citizenshipCode 🖋	×
ssn 🖉	×
dateOfDeath 🖋	×

The following image shows the Advanced Search dialog.

Name		?	Mother Maiden Name		
Middle Name		?	Marital Status		
Citizenship Code			SSN		
Date Of Death	#	?	Date Of Birth	?	
Cause Of Death			Gender		
Deceased Code					0

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

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

Related Instances Vi	ew 🗙 Breadcrumb View 🗙	+ Add view -	
	Included:	Grouped Grid View	E
	sourceName 🖋	Case Properties View	<< >>
	sourceinstanceld 🖋	Cases Popup View	
	omniModifiedDate 🖋	Instance Issues Grid View	

Editing a Table

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

	Settings Exceptions	
III Table List + New Table / Edit Table 🖹 Del	lete	Ø Hel
Source OmniSource		
Table PatientMaster		
Name Patient Masters		
Record Name Patient	Name for single table record	
Info Tab Indicator OFF	Indicates whether a table is an information kind of tab	
Breadcrumb View X Related Instances View X Fr	requent Search View X Advanced Search View X	
Record Properties View X Full Info View X Quick	Details View X Grid Result View X + Add view -	
ncluded:	Excluded:	
ncluded: masterid A X	Excluded:	
included: masterid at a star of a st	Excluded: addressLine1 addressLine2	
ncluded: masterid / × fullName / × dateOfBirth / ×	Excluded: addressLine1 / addressLine2 / addressLine3 /	
included: masterid / X fullName / X dateOfBirth / X ssn / X	Excluded: addressLine1 / addressLine2 / addressLine3 / addressLine4 / addressLin	
included: masterid / X fullName / X dateOfBirth / X ssn / X	Excluded: addressLine1 / addressLine2 / addressLine3 / addressLine4 / addressUsageComment /	
included: masterid A X fullName A X dateOfBirth A X ssn A X	Excluded: addressLine1 // addressLine2 // addressLine3 // addressUsageComment // adoptedCode //	
included: masterid / X fullName / X dateOfBirth / X ssn / X	Excluded: addressLine1 addressLine2 addressLine3 addressLine3 addressUsageComment adoptedCode adoptedCode	
included: masterid a X fullName a X dateOfBirth a X ssn a X	Excluded: addressLine1 / addressLine2 / addressLine2 / addressLine3 / addressLine4 / addressUsageComment / adoptedCode / adoptedCode Description / adoptedCodel / adoptedC	
included: masterId / X fullName / X dateOfBirth / X ssn / X	Excluded: addressLine1 // addressLine2 // addressLine3 // addressUsageComment // adoptedCodeDescription // adoptedCodeI // adoptedCodeI // adoptedCodeI // adoptedCodeI //	
included: masterid / × fullName / × dateOfBirth / × ssn / ×	Excluded: addressLine1 / addressLine2 / addressLine3 / addressUsageComment / adoptedCode / adoptedCodeld / adoptedCodeld / ambulatoryStatusCodeDescription /	

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

addresses	×	cases 🖋	
names 🖉	×	contactMethods 🖋	
		identifiers 🖋	
		instances 🖋	
		preferredProviders &	

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

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

icluded:			Excluded:	
casename 🖋	×	<< >>	assignee 🖋	^
closedFlag 🖋	×		assignmentDT 🖋	
documentName 🖋	×		createDT 🖋	
idUser 🖋	×		currentState 🖋	
idUserCreated 🖋	×		daysOld 🖋	
caseType 🖋	×		documentReference 🖋	
idUserUpdated 🖋	×		fullName 🥜	
			id /	
			instanceCount 🖋	
			queueName 🖋	
			reasonCode 🖋	-
	•			
casename				
closedElag		•		
closedFlag		*		
closedFlag documentName				
closedFlag documentName idUser		*		
closedFlag documentName idUser idUserCreated		•		
closedFlag documentName idUser idUserCreated caseType		•		

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

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

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

casename	gene		casename	0	
closedFlag	manual general		closedFlag	manual cleansing	
documentName	Type or click here	*	documentName	manual matching manual general	
idUser		-	idUser	Type or click here	
idUserCreated		*	idUserCreated		
caseType		*	caseType		
idUserUpdated			id lear Indated		

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

casename	manual matching × manual general ×	*
closedFlag	Type or click here	*
documentName	Type or click here	*
idUser		-
idUserCreated	Type or click here	*
caseType	Type or click here	-

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

Editing a Column

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

	an contrar		C Trong
Name	masterid		
Description			
Title	UEMID		
Table *	Patient Masters		
Туре	String		
View	Breadcrumb View		
Treat As	text	•	
Width			
Alignment	left	•	
Can Sort	ON		
Can Filter	ON		
Can Edit	ON		
Is Visible	ON		
Is Logged	OFF		

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

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

Global Column Editing

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

Description		
		Update in all views
Title	UEMID	

Editing a Link

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

OMNIPATIENT	Patient Masters 🔹	Advanced Search	
Search for Patient Masters	Provider Masters		0
Keyword Name		Mm Ssn	?
Demographics		r Date Of Dirun	
Ethnicity			
 Language Impairments 			
Search Clear Cl	550		or try search Addresses Names

Link List + New L	ink / Edit Link 🗟 Delete	O Hel
Name	addresses	
Description		
Title	Addresses	
Table *	Providers	
View	Full Info View	
Treat As	text	
Is Visible	ON	
Reference Type	Person Addresses	

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

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

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

Table Order

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

Table Order List

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

Sources Vie	ws Options	Tables	Table Order	Settings	Exceptions	
I Table Order	List					O Help
Title				\$	Name	\$
Master Table Or	der				masterTableOrder	
Home	🛃 Dow	nload				O Back to top
2 Contacts	Metadat	a ad Metadata				

Editing a Table Order

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

Table Order List	Edit Table Order 🔒 Delete	Help
Title	Master Table Order	
Name	masterTableOrder	
Tables	Patient Masters 🖋	
	Provider Masters 🖋	
	Facility Location Masters 🖋	
	Facility Masters 🖋	
	Organization Masters 🖋	
	Worker Masters 🖋	
	Update Delete Cancel	

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

Settings

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

Default date format for date pickers and date fields.

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

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

Setting List

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

E Settings List + New S	Setting			O Help
Name \$	Title +	Description ¢	Type ‡	Value
trackJsErrors	Track JavaScript Errors	Track JavaScript Errors	Boolean	true
defaultDateTimeFormat	Date Time Format	Default date time format for that is used for custom date properties that do not belong to any view (e.g. activity dates for cases)	String	yyyy-MM-dd hh:mm:ss a
showPopupWithCopyButton	Show Popup With Copy Button	Show pop ups with copy button in domain view table when hovering records	Boolean	false
showActionIcons	Show Action Icons	Show icons in domain view table for actions	Boolean	true
defaultDateFormat	Date Format	Default date format for date pickers and date fields without pattern	String	MM/dd/yyyy
loadRecordsByDefault	Load records by default	Load records by default on home page, or after searching only	Boolean	false
issuePageTablesCount	Default grid number	The number of grids expanded by default on issue search page.	Numeric	3
issueFiterSectionsCount	Issue Fiter Sections Count	Issue Fiter Sections Count	Numeric	1
loggingELK	Enable ELK logging	Enable ELK logging	Boolean	false
proxyUrl	Proxy Url	Proxy Url	String	http://omnipat1.ibi.com:808

Show Setting

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

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

Setting value

	III Setting List	+ New Setting Setting Delete	• Help
0	Name	defaultDateFormat	
2	Title	Date Format	
3	Description	Default date format for date pickers and date fields without pattern	
4	Туре	String	
6	Value	MM/dd/yyyy	

Creating a New Setting

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

Name		
Title		
Description		
Туре	•	

Editing a Setting

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

Name	defaultDateFormat	
Title	Date Format	
Description	Default date format for date picks	
Туре	String	
Value	MM/dd/yyyy	

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

Exceptions

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

Exception List

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

Source	es Views Options T	ables Table Sets S	Settings Exceptions
Exe	ceptioninfo List		• Неір
Id	User	Date	Stack trace
* 3	projects/wso2sysadmin1	2014-05-20 12.04.33	com. Ibi op search. SourceResponseException: Response code 404: Not Found at com Ibi op config. SourceClientService5_1L_doRequest_closure6_closure6_closure0_doCall(SourceClientService.groovy:54) at groovyx.net.http.HTTPBuilder51.handleResponse(HTTPBuilder.java:494) at org apache.http.impl.client.CloseableHttpClient.execute(CloseableHttpClient.java:160) at groovyx.net.http.HTTPBuilder.of AcquestItpClient.execute(CloseableHttpClient.java:160) at groovyx.net.http.HTTPBuilder.of AcquestItpClient.execute(CloseableHttpClient.java:160) at groovyx.net.http.HTTPBuilder.of AcquestItpClient.execute(CloseableHttpClient.java:160) at groovyx.net.http.HTTPBuilder.of AcquestItpClient.execute(CloseableHttpClient.java:100) at groovyx.net.http.HTTPBuilder.of AcquestItpClientService.groovy:38) at com. Ibi op config_SourceClientService.stt_doRequest(SourceClientService.groovy:38) at com. Ibi op config_SourceClientService.stt_doRequest(SourceService.groovy:39) at com.Ibi op config_SourceClientService.stt_doRequest(SourceService.groovy:39) at com.Ibi op config_SourceClientService.stt_gretEntlyTypes(SourceService.groovy:39) at grails.plugin.cache.web.filter.PageFragmentCachingFilter doFilter(PageFragmentCachingFilter.java:200) at grails.plugin.cache.web.filter.PageFragmentCachingFilter doFilter(PageFragmentCachingFilter.java:200) at grails.plugin.springsecurity.web.filter.GrailsAnonymousAuthenticationFilter.doFilter (GrailsAnonymousAuthenticationFilter.java:35) at grails.plugin.springsecurity.web.authentication.RequestHolderAuthenticationFilter.doFilter (RequestHolderAuthenticationFilter.java:35) at grails.plugin.springsecurity.web.authentication.RequestHolderAuthenticationFilter.doFilter (RequestHolderAuthenticationFilter.java:35) at grails.plugin.springsecurity.web.authentication.RequestHolderAuthenticationFilter.doFilter (RequestHolderAuthenticationFilter.java:35) at grails.plugin.springsecurity.web.authentication.RequestHolderAuthenticationFilter.doFilter (RequestHolderAuthenticationFilter.java:35) at grails.plugin.springsecurity.
▶ 2	projects/wso2sysadmin1	2014-05-20 12.04.24	com.ibi.op.search.SourceResponseException: Response code 404: Not Found at com.ibi.op.config.SourceClientServi
► 1	projects/wso2sysadmin1	2014-05-20 12.01.59	java.lang.RuntimeException: wslite.soap.SOAPClientException: 500 Internal Server Error at org.springframework.sec

Downloading and Uploading Metadata

This section describes how to download and upload metadata.

Downloading Metadata

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

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

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

New folder			
Jame	Date modified	Type	Size
The second second section because	24.02.2014.10-07	(7 E)-	301 KD
configstert bat	24.03.2014 19:07	Windows Patch File	201 KD
sonfigtest.bat	24.03.2014 19:07	CLI Ella	2 KD
configtest.sn	24.03.2014 19:07	Mindaus Patch File	2 KD
Be cpappend.bat	24.03.2014 19:07	CLI CL	2 ND
disect bat	24.03.2014 19:07	Mindaus Datch File	0 ND
ingest.bat	24.05.2014 19:07	CLI Ella	2 10
digest.sn	24.03.2014 19:07	SH File	2 ND
S produb.nz.db	24.03.2014 21:25	Data Base File	5 130 KB
is prodDb.lock.db	24.03.2014 21:16	Data Base File	1 KB
lo service.bat	24.03.2014 19:07	Windows Batch File	7 KB
setclasspath.bat	24.03.2014 19:07	Windows Batch File	4 KB
setclasspath.sh	24.03.2014 19:07	SH File	4 KB
shutdown.bat	24.03.2014 19:07	Windows Batch File	2 KB
shutdown.sh	24.03.2014 19:07	SH File	2 KB
🐁 startup.bat	24.03.2014 19:07	Windows Batch File	2 KB
startup.sh	24.03.2014 19:07	SH File	2 KB
🔌 tcnative-1.dll	24.03.2014 19:07	Application extens	1 553 KB
tomcat7.exe	24.03.2014 19:07	Application	102 KB
o tomcat7w.exe	24.03.2014 19:07	Application	102 KB
🛋 tomcat-juli.jar	24.03.2014 19:07	Executable Jar File	38 KB
tomcat-native.tar.gz	24.03.2014 19:07	GZ File	280 KB
🚯 tool-wrapper.bat	24.03.2014 19:07	Windows Batch File	4 KB

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

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

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

# Home	Download Metadata	O Back to top
⊠ Contacts		C catal a top

Uploading Metadata

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

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

		Upload	Metadata		
Pleas	e upload metada	ata XML file to initialize sou	irce, tables, column	ns and other compon	ents.
	Choos	se File No file chosen		Upload	

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

9	Upload Meta	adata
Please upload metadata)	KML file to initialize source, tab	les, columns and other components.
0	File cannot be emp	oty
Choose F	ile No file chosen	Upload

Configuring 360 Viewer

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

Sources Views Options Tables Table Order Settings Exceptions	
I able Order List 0	Help
Title ϕ Name	¢
Master Table Order masterTableOrder	
Sources views Options Tables Table Order Settings Exceptions	
III Table Order List Cidit Table Order	
Title Master Table Order	
Name masterTableOrder	
Tables Patient Masters 🖋	
Provider Masters 🖋	
Facility Location Masters 🖋	
Facility Masters 🌶	
Organization Masters	
TURE musters #	
Update Delete Cancel	

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

II Table List	Table 🖌 Edit Table 🖨 Delete			Help
Source	OmniSource			
Table	PatientMaster			
Name	Patient Masters			
Record Name	Patient Name for single tabl	le record		
Grid Result View X Related Instances View X	Quick Details View X Full Info View X Record P K Breadcrumb View X + Add view ▼	roperties View 🗙	Advanced Search View 🗶 🔋 Frequent Search View 🕷	
	Included:		Excluded:	
	masterid 🖋	× < >>	addressLine2 /	
	firstName 🖋	×	addressLine3 🖋	
	middleName 🖋	×	addressLine4 🖋	
	lastName 🖋	×	addressUsageComment /	
	dateOfBirth A	×	adoptedCode 🖋	
	addressLine1 🖋	×	adoptedCodeDescription /	
	city 🌶	×	adoptedCodeld A	
	stateProvinceCodeDescription <i>#</i>	×	ambulatoryStatusCode 🌶	
	postalCode a	×	ambulatoryStatusCodeDescription #	
	omniModifiedDate 🖋	×	ambulatoryStatusCodeld 🖋	
			badDebtCode 🖋	•

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

I Table List + New	Table 🕜 Edit Table 💼 Delete			Help
Source	OmniSource			
Table	PatientMaster			
Name	Patient Masters			
Record Name	Patient Name for single table rec	cord		
Grid Result View 🗶	Quick Details View X Full Info View X Record Prope	rties View X	Advanced Search View 🗙 Frequent Search View 🗙	
Related Instances View	Breadcrumb View 🗶 🛛 + Add view 👻			
	Included:		Excluded:	
	Sender X	^ <u> </u>	addressLine1 A	
	genderCode 🖋 🛛 🗙		addressLine2 🖋	
	genderCodeDescription 🖋 🛛 🗙		addressLine3 🖋	
	E Gender X		addressLine4 🖋	
	EE Marital Status X		addressUsageComment 🖋	
	maritalStatusCode 🖋 🛛 🗙		adoptedCode 🖋	
	maritalStatusCodeDescription 🖋 🛛 🗙		adoptedCodeDescription 🖋	
	== Marital Status ×		adoptedCodeld A	
	E Language X		ambulatoryStatusCode 🖋	
	languageCode 🖋 🛛 🗙		ambulatoryStatusCodeDescription <i>P</i>	
	languageCodeDescription / X	•	ambulatoryStatusCodeld 🖋	-

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

d Result View 🗶 🛛 Quick Details View 🎗 🛛 Full Info Vie	w 🗙 Record	Properties View 🗙	Advanced Search View 🗙	Frequent Search Vi
ated Instances View 🗶 🛛 Breadcrumb View 🗶 🔸 Add	view 🔻			-
inks Included:		Excluded:		
addresses 🖋	×	cases 🖋		
identifiers 🖋	×	contactMeth	nods 🖋	
names 🖋	×	instances 🖋		
		preferredPr	oviders 🖋	

Table	PatientMaster				
Name	Patient Masters				
Record Name	Patient		Name for single table	record	
Info Tab Indicator	OFF		Indicates whether a ta	able is an information kind of tab	
Is Logged	ON		Log events from this	table	
Breadcrumb View 🗙	Related Instances View X	Fre	quent Search View 💥	Advanced Search View 🗱	
Record Properties View	K Full Info View X C	uick D	etails View 🕷 🛛 Grid	d Result View 🗶 🔹 + Add view 👻	
Included:			E	Excluded:	
firstName 🖋		×	<< >>	addressLine1 🖋	* 11
lastName 🖋		×		addressLine2 🖋	
dateOfBirth 🖋		×		addressLine3 🖋	
mrn 🖋		×		addressLine4 🖋	
ssn 🖋		×		addressUsageComment <i>P</i>	
				adoptedCode 🖋	
				adoptedCodeDescription 🖋	
				adoptedCodeld 🖋	
				ambulatory StatusCode 🖋	
				ambulatory StatusCodeDescription 🖋	
			J	ambulatory StatusCodeld 🖋	

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

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

Table	PatientMaster				
Name	Patient Masters				
Record Name	Patient		Name for single table	e record	
Info Tab Indicator	OFF		Indicates whether a	table is an information kind of tab	
Is Logged	ON		Log events from this	table	
Breadcrumb View X	Related Instances View X	Fre	quent Search View 🗙	Advanced Search View 🕷	
Record Properties View	× Full Info View × C	Quick (Details View 🗶 🛛 Gri	d Result View 💥 🔹 + Add view 👻	
Included:			_	Excluded:	
Demographics		×	<< >>	addressLine1 /	Î.
firstName 🖋		×		addressLine2 🖋	
lastName 🖋		×		addressLine3	
motherMaidenName 🖋		×		addressLine4 🖋	
middleName 🖋		×		addressUsageComment 🖋	
ssn 🖋		×		adoptedCode 🖋	
mm 🖋		×		adoptedCodeDescription 🖋	
dateOfBirth 🖋		×		adoptedCodeld 🖋	
				ambulatory StatusCode 🌶	
				ambulatory Status CodeDescription 🖋	
				ambulatory StatusCodeld 🖋	

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

Included:		Excluded:
addresses 🖋	×	cases 🖋
contactMethods 🖋	×	instances 🖋
identifiers A	×	
names 🖋	×	
preferredProviders 🖋	×	

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

Table PatientMaster				
Name Patient Masters				
Record Name Patient		Name for single table	e record	
Info Tab Indicator OFF		Indicates whether a t	table is an information kind of tab	
Is Logged ON		Log events from this	table	
Breadcrumb View X Related Instances View	X Fr	equent Search View 🗙	Advanced Search View	
Record Properties View S	Quick	Details View 👗 Gri	d Result View 🐥 🔹 + Add View 👻	
Included:			Excluded:	
Demographics	×	< >>	adoptedCodeld 🖋	ĥ
firstName 🖋	×		ambulatory Status Codeld 🖋	E
middleName 🖋	×		badDebtCodeld A	
lastName 🖋	×		blindCodeld 🖋	
fullName 🖋	×		careLanguageCodeld 🖋	
suffix 🌶	×		citizenshipCodeld 🖋	
prefix 🖋	×		countryCodeld a	
title 🖋	×		countyRegionCodeld 🖋	
dateOfBirth 🖋	×		deafCodeld 🖋	
ssn 🖋	×		deceasedCodeld 🖋	
addressLine1 🖋	×		disabilityCodeld 🖋	-

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

Table	PatientMaster			
Name	Patient Masters			
Record Name	Patient	Name for single table	e record	
Info Tab Indicator	OFF	Indicates whether a t	table is an information kind of tab	
Is Logged	ON	Log events from this	table	
Breadcrumb View X	Related Instances View X Free	quent Search View 🗙	Advanced Search View X	
Record Properties View	Full Info View X Quick D	etails View 🗶 🛛 Gri	d Result View 🗶 → Add view 🕶	
Included:	_		Excluded:	
masterid 🖋	×	<< >>	addressLine1	
omniModifiedDate 🖋	×		addressLine2 🖋	
			addressLine3 🖋	
			addressLine4 🖋	
			addressUsageComment 🖋	
			adoptedCode 🖋	
			adoptedCodeDescription 🖋	
			adoptedCodeld 🖋	
			ambulatory StatusCode 🖋	
			ambulatory Status CodeDescription 🖋	
			ambulatory StatusCodeld 🖋	-

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

Sources Views Options Tables Table Order	Settings Exceptions						
III Table List + New Table / Edit Table							
Source OmniSource							
Table PatientMaster	Table PatientMaster						
Name Patient Masters	Name Patient Masters						
Record Name Patient	Record Name Patient Name for single table record						
Grid Result View X Quick Details View X Full Info View X Record Properties View X Advanced Search View X Frequent Search View X Related Instances View X Breadcrumb View X + Add View +							
Included: Excluded:							
masteric	x addressLine2#						
firstName	× addressLine3 🖋						
middleName	× addressLine4 #						

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

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

Sources Views Options Tables Table Order Settings Exceptions				
E Setting Lad + New Setting O Help				
Name 0	Title 0	Description	0 Type 0	Value 0
trackJsErrors	Track JavaScript Errors	Track JavaScript Errors	Boolean	true
defaultDateTimeFormat	Date Time Format	Default date time format for that is used for custom date properties that do not belong to any view (e.g. activity dates for cases)	String	yyyy-MM- dd hh:mm:ss a
showPopupWithCopyButton	Show Popup With Copy Button	Show pop ups with copy button in domain view table when hovering records	Boolean	true
showActionIcons	Show Action Icons	Show icons in domain view table for actions	Boolean	true
defaultDateFormat	Date Format	Default date format for date pickers and date fields without pattern	String	MM/dd/yyyy
loadRecordsByDefault	Load records by default	Load records by default on home page, or after searching only	Boolean	true
issuePageTablesCount	Default grid number	The number of grids expanded by default on issue search page.	Numeric	3
issueFiterSectionsCount	Issue Fiter Sections Count	Issue Fiter Sections Count	Numeric	1

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

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

Sources Views Options Tables Table Order Settings Exceptions			-		
E Setting List + New Setting O Help			Sources Views Onlines Tables Table Order Settings Fi		
Name 0	Title 0	Description	туре 0	Value 0	
trackJsErrors	Track JavaScript Errors	Track JavaScript Errors	Boolean	true	I≣ Setting List + New Setting
defaultDateTimeFormat	Date Time Format	Default date time format for that is used for custom date properties that do not belong to any view (e.g. activity dates for cases)	String	yyyy-MM- dd hh:mm:ss a	Title Show Popup With Copy Button
showPopupWithCopyButton	Show Popup With Copy Button	Show pop ups with copy button in domain view table when hovering records	Boolean	ti ze	Description Show pop ups with copy button a Type Boolean
showActionIcons	Show Action Icons	Show icons in domain view table for actions	Boolean	true	Value ON
defaultDateFormat	Date Format	Default date format for date pickers and date fields without pattern	String	MM/dd/yyyy	r
loadRecordsByDefault	Load records by default	Load records by default on home page, or after searching only	Boolean	true	Literate Detelo Reset
issuePageTablesCount	Default grid number	The number of grids expanded by default on issue search page.	Numeric	3	
issueFiterSectionsCount	Issue Fiter Sections Count	Issue Fiter Sections Count	Numeric	1	

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

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



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

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

Sources Views	Options Tables Table Order Se	ttings Exceptions					
🔚 Table List 🛛 🕂 Ne	III Table List + New Table Clit Table 🖹 Delete						
Source	Source OmniSource						
Table	ProviderLicenseMaster						
Name	Provider License Masters						
Record Name	Provider License Na	me for single table record					
Info Tab Indicator	ON	licates whether a table is an information kind of tab					
Is Logged	ON	g events from this table					
Breadcrumb View 🗶	Advanced Search View 🗶 Record	Properties View 🕷 🛛 Full Info View 🕷 🔹 Quick Details View 🕷					
Grid Result View X	+ Add view -						

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

Sources Views Op	tions Tables	Table Order	Settings	Exceptions	
I Settings List					
Name *	isDataExpandedE	ByDefault			
Title *	Expand All]		
Description	Defines default	display of section			
Type *	Boolean				
Value	ON				
	Update De	ete Reset			

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

Configuring Remediation Pages

This section describes the configurations for the remediation pages.

Issues Page

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

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

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

Case Issues Grid

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

- general
- domain

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

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

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

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

Sources	Views	O	ptions	Tables	Table Order	Settings	Exceptions
III Views	List 🕇	New	View				
	Т	itle	Case	Issues Grid	1 View		
	Na	me	casel	issuesGrid∨	íew)	
	Exclude	All	ON				
Has Co	lumn Grou	ıps		OFF			
Has Columr	Sub Grou	ıps		OFF			
Has Colt	umn Sectio	ons		OFF			
	Has Lir	nks		OFF			
			Crea	ate Res	et		

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

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

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

⊙ Pa	rtvMas [:]	ter 2												
0.0														
O ge	neral C													
Shown	g 1-2 of 2	records. Number of re	cords per page	•									- 44	1 +
		Id	Severity	Systems	Ssn	Id Us	er Created	Create D T	Update D T	Days Old	Ticket Count	Lastname	First	name
					Λ								Λ.	
۲	0	7C9B71E6-1C3	0	crm		PRIM	ARY/nad	10/28/2015	10/28/2015	0	2	Smith	Λ	
۲	Ð	6D9AF845-018	0	crm 📘	4	PRIM	ARY/nad	10/28/2015	10/28/2015	0	2	Watson	3 ne	
Showin	a 1-2 of 2	records. Number of re	cords per page 1	0									16.	
Gliones	91.2012	records. Humber of re	cores her halfe	0 .										1
				My Cases Filler View	X All Cases Filter View 3	Can	e Issues Grid Vie	w × + Add view +					ш	
				Included				Excluded:					ш	
				.d.#		×	44 39	▲FGmempleas.		<u>^</u>			ш	
				severity 2		×		caseType 🖋					ш	
				systems 🖋		×		casename /					ш	
				\$10.P		×		closedFlag.		_			ш	
				idUserCreated.		×		currentState /					ш	
				createOT#		×		documentName /					ш	
				updateOT /		×		documentReference.	/				ш	
				daysOld₽		×		idUser /					ш	
				toketCourt/		×		idUserUpdated.#					ш	
								instanceCount./					ш	
								fast name 2					ш	
				Domain Columns:									-	
				Paties Party Ma	sters									
				Included.				Excluded:						
				last_name		×	« »	generalissue		-				
				first_name		×		fastUpdateDate						
								fastUpdateTid						
								legal_form						
								manualMatching		-				

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

Ticket Issues Grid

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

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

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

Sources	Views	Options	Tables	Table Order	Settings	Exceptions
🖽 Views I	List 🕇	New View			_	
	т	itle	t Issues Gr	id View		
	Na	ticket	(IssuesGrid)	view.]	
	Exclude					
Has Co	lumn Grou	ips	OFF			
Has Column	Sub Grou	ips	OFF			
Has Colu	umn Sectio	ons	OFF			
	Has Lir	nks	OFF			
		Crea	ate Res	et		

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

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

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

⊙Pa	rtyMas	ter 2							100 85 85 95 95 95					640642				1000	
⊙ ge	neral 💽)																	
Showin	ig 1-2 of 2	records. No	mber of re	cords per	page 10	•													
		Id		Severity	y	System	IS	Ssn		ld Us	er Created	Cr	reate D T	Up	date D T	Da	nys Old	Tie	ket Count
													#		*				
\odot		7C9B718	6-103		0	crm				PRIM	ARY/nad	10	/28/2015	10/	28/2015	0		2	
	Showir	ig 1-2 of 2 ri	cords. Nu	mber of rea	cords per p	age 10	•												
	Id		Ticket S	Severity	Ticket T	ype	Reason C	ode	Create D 1		Update D 1	r	Id User Crea	ted	Id User Updat	t	Reason Desc		Closed Flag
								٨		m		*							
	7AA17	A1C-23		0	general		Manually E	dined	10/28/2015		10/28/2015		PRIMARY/na	d	PRIMARY/nad	l	comment add		false
	DBDB1	718-82		0	general		Manually E	icted	10/28/2015		10/28/2015		PRIMARY/na	d	PRIMARY/nad	l	comment add		false
	Showir	ig 1-2 of 2 r	ecords. Nu	mber of rea	cords per p	age 10	•	ι.	7										
٥		6D9AFB	15-018		0	crm		Ш		PRIM	ARY/nad	10	/28/2015	10/	28/2015	0		2	
Showin	a 1-2 of 2	records. No	mber of re	cords per	page 10	•		H											
RECORD	arar ar		Tech State	ana an	TELETER	and the	A A PARTIE		aran anan	20101				66					
					м	y Cases F	ilter View ≫	ч	Cases Filter	Vtew ≫	Ticket Is	ssues	s Grid View ≍	+ A	dd view *				
					Incl	uded:							Exclude	d:					
					id	/					× <	<	>> assign	men	OT 🖍				-
					ti	ketSeve	ity 🖋				×		caseld	/					
					ti	:ketType	/				×		caseT	ype /	•				
					re	asonCod	e 🖊				×		curren	tStat	te 🖋				
					C	eateDT					×		docum	nenth	lame 🖍				
					ų	odateDT#	•				×		docun	nentF	Reference 🖋				
					id	UserCrea	ted 🖋				×		docum	nentT	ype 🖍				
					id	UserUpd	sted 🖋				×		idSCX	mL /	root d				
					re	asonDes					×		idlice	eura Assid	med 2				
					c	osedHag					*		avoire	Nam	9110 <i>4</i>				
													queue	and the					

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

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

🖋 Edit Co	blumn	
	Name	fullName
	Description	
	Title	Name
	Table *	Patient Masters
	Туре	String
	View	Breadcrumb View
	Treat As	text 🔹
	Width	
	Alignment	left •
	Can Sort	ON
	Can Filter	ON
	Can Edit	OFF
	Is Visible	ON
	Is Logged	OFF
		Update Reset

Filtering Panel on My Cases Tab

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

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

Table WfCase					
Name Wf Cases			F	ilters	
Record Name Record	Name for	ingle table record		assignee: ME	Assedue
Info Tab Indicator OFF	Indicates	whether a table is an information kind of tab	6	Case Type	- ddwl
Instance Issues Grid View X Master Issu	es Grid View X 🛛 Grid R	esult View ≍ My Cases Filter View ≍		Cleansing	6
All Cases Filter View 🗶 🔹 + Add view 💌			_	🖂 general	4
Included:		Excluded:		matching	5
caseType 🖋	×. <<	>> assignee /	<u>^</u>	Casename	
casename 🖋	×	assignmentDT 🖋	0	Closed Flag	
closedFlag /	×	createDT 🖍		Severity	
severity 🖋	×	documentReference /		Decord Statue	
record Status /	×	fullName /			
sourceName 🖋	×	id 🖉	0	Source Name	
currentState d	×	idUser 🖋		Current State	
daysOld 🌶	×	idUserUpdated 🌶	0	Days Old	
documentName ?	×	instanceCount a	0	Document Name	
idUserCreated 🖋	×	queueName 🖋		D. Id Hear Created	
		reasonCode 2	-	g tu user created	

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

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

Filtering Panel on All Cases Tab

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

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

Table WFTicket				
Name WF Tickets				
Record Name Record	Name for single tabl	ie record		
Info Tab Indicator OFF	Indicates whether a	table is an information kind of tab		
Instance Issues Grid View X Master Issues Grid View X	Grid Result Viev	v X My Cases Filter View X		
All Cases Filter View 🗶 🔸 Add view 👻				Filters
Included:		Excluded:		Apply
assignee 🖍 🛛 🗙	«< >>	assignmentDT 🖋	A	Assignee
casename 🖋 🛛 🗙		caseType 🖋		Casename
idUserCreated 🖋 🛛 🗙		closedFlag s		Id User Created
idUserUpdated 🖋 🛛 🗙		areateDT_*		Id User Updated
viewedFlag 🖋 🛛 🗙		currentState 🖋		
systems 🖋 🛛 🗙		daysOld 🌮	-	Viewed Flag
documentReference 🖋 🛛 🗙		documentName a		Systems
	•	fullName 🖋		Document Reference
		id 🖋		
		idUser 🖋		
		instanceCount 2	*	

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

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

Number of Filtering Criteria Sections Expanded by Default

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

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

Sources Views Options Tables Table Order Settings	Exceptions Filters
	assignee: ME
E Setting List + New Setting Zedit Setting Delete	Apply
Name issueFiterSectionsCount	⊙ Case Type
Title Issue Fiter Sections Count	Cleansing 6
Description Issue Fiter Sections Count	🗇 general
Type Numeric	matching 5
Type Humono	ⓒ Casename
Value 2	manual cleansing (6)
	🖂 manual general
	manual matching 5
Upoate Delete Reset	⊙ Closed Flag

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

Default Filtering on My Cases/All Cases Tab

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

DefaultFiltersMyCases

DefaultFiltersAllCases

Sources Views Or	tions Tables	Table Order	Settings	Exceptions
E Options List	w Option			
Title	Default Filter Sta	ate My Cases)	
Name	DefaultFilterStat	eMyCases		
Description	DefaultFilterStat	eMyCases		
Туре	String	•		
Default Value				
Path Type	view	•		
Path Name	My Cases Filter	View •		
	Create	set		

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

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

Title	¢	Name \$	¢ Description	туре [‡]	Default Value	Path Type [‡]	Path Name
Record Name		tableRecordName	Name for single table record	String	Record	table	
Info Tab Indicator		isInfoTab	Indicates whether a table is an information kind of tab	Boolean	false	table	
Is Logged		IsLogged	Log events from this table	Boolean	true	table	
DefaultFilterState	MyCases	DefaultFilterStateMyCases	DefaultFilterStateMyCases	String		view	myCasesFilterView
DefaultFilterState/	AllCases	DefaultFilterStateAllCases	DefaultFilterStateAllCases	String		view	allCasesFilter∨iew

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

cluded:			Excluded:	
casename 🖋	×	<< >>	assignee 🖋	
closedFlag 🖋	×		assignmentDT 🌶	
documentName 🌶	×		createDT 🖋	
dUser 🖋	×		currentState 🖋	
dUserCreated 🖋	×		daysOld 🖋	
caseType 🖋	×		documentReference 🖋	
dUserUpdated 🖋	×		fullName 🖋	
			id 🥒	
			instanceCount 🔗	
			queueName 🖋	
			queueName ≠	
			queueName /	
fault Filter State My Cases casename	Type or click here		queueName 🖋	
sfault Filter State My Cases casename closedFlag	Type or click here Type or click here	•	queueName 🖋	
fault Filter State My Cases casename closedFlag documentName	Type or click here Type or click here Type or click here	•	queueName ≠ reasonCode ≠	
sfault Filter State My Cases casename closedFlag documentName idUser	Type or click here	× × ×	queueName 🖋	
fault Filter State My Cases casename closedFlag documentName idUser idUserCreated	Type or click here	· · ·	queueName ≠ reasonCode ≠	

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

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

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

Default Filter State My Cases		
casename	gene	-
closedFlag	manual <mark>gene</mark> ral	
documentName	Type or click here	Ŧ
idUser	Type or click here	-
idUserCreated	Type or click here	*
caseType	Type or click here	-
idUserUpdated	Type or click here	*

Default Filter State My Cases		_
casename		-
closedFlag	manual cleansing	
	manual matching	
documentName	manual general	
idUser	Type or click here	*
idUserCreated	Type or click here	*
caseType	Type or click here	*
idUserUpdated	Type or click here	*

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

Default Filter State My Cases		
casename	manual matching × manual general ×	-
closedFlag	Type or click here	•
documentName	Type or click here	*
idUser	Type or click here	*
idUserCreated	Type or click here	*
caseType	Type or click here	*
idUserUpdated	Type or click here	*

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

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

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

□ SwitcherValuesStateAllCases

E Options List + Ne	ew Option 🖌 Edit Option 🗎 Delete
Title *	SwitcherValuesStateMyCases
Name *	SwitcherValuesStateMyCases
Description	adds possibility using of multisele
Type *	String
Default Value	
Path Type *	view
Path Name	myCasesFilterView
	Update Delete Reset

□ SwitcherValuesStateMyCases

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

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

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

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

Case Properties View X Case Issues Grid View X	Advanced Search View X + Add view •	Quick Details View 🗙	My Cases Filter View ₩	All Cases Filter View 🗙
ncluded:		E	xcluded:	
closedFlag 🖋	×	« »	assignmentDT 🖋	^ ^
documentName 🖋	*	c	createDT 🖋	
id 🖋		c	daysOld 🖋	
idUserCreated 🖋	*	c	documentReference 🖋	
idUserUpdated 🖋	*	c	fullName 🖋	
idUser 🖋	*	c	instanceCount 🖋	
casename 🖋	×	t	queueName 🖋	
			record Status 🖋	
Г]		severity 🖋	
4	Ļ		sourceName 🖋	
<u> </u>			ssn 🖋	
DefaultFilterStateMyCases		S	witcherValuesStateMyCases	
closedFlag	false ×	· ·	ON	
documentName		•	ON -	
			ON	
Id			ON	
id idUserCreated		· ·	ON	
idUserCreated	Type or click here Type or click here Type or click here	•		
id idUserCreated idUserUpdated idUser	Type or click here Type or click here Type or click here Type or click here		0N 00 00 00 00 00 00 00 00 00 00 00 00 0	

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

luded:			Excluded:	
dUserAssigned 🖋		×	<< >> documentReference /	
idUserCreated 🖋		×	documentType 🖋	
id 🖋		×	Id SCXML 🖋	
idUserUpdated 🖋		×	queueName 🖉	
reasonCode 🖋		×	record Status 🌶	
id TicketParent 🖋		×	refTargetName 🖋	
ticketType 🖋		×	refTargetType 🖋	
			updateDT 🖋	
-	-		viewedFlag 🖍	
Ļ	Ļ		ticket Severity 🖋	
			reasonDesc 🖋	
witchor/ /alugeStateMuCae	100			
witcherValuesStateMyCas	ses			
witcherValuesStateMyCas idUserAssigned	OFF			
witcherValuesStateMyCas idUserAssigned idUserCreated	OFF OFF			
witcherValuesStateMyCas idUserAssigned idUserCreated id	OFF OFF			
witcherValuesStateMyCas idUserAssigned idUserCreated id	OFF OFF OFF			
witcherValuesStateMyCas idUserAssigned idUserCreated id idUserUpdated	OFF OFF OFF			
witcherValuesStateMyCas idUserAssigned idUserCreated id idUserUpdated reasonCode	OFF OFF OFF OFF			
witcherValuesStateMyCas idUserAssigned idUserCreated id idUserUpdated reasonCode idTicketParent	OFF OFF OFF OFF OFF			

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

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

Excluded: Included: idUserAssigned 🖋 × assignmentDT idUserCreated A caseld 🖋 × id A × caseType 🖋 idUserUpdated 🖋 × closedFlag 🖋 reasonCode 🖋 createDT 🖋 × id TicketParent 🖋 × current State 🖋 ticketType 🖋 documentName / × documentReference & documentType 🖉 Filter by Cases Filter by Tickets id St Apply ¥ aue Id User Assigned SwitcherValuesStateMyCases PRIMARY/nadyau 3 idUserAssigned OFF 1 UNASSIGNED idUserCreated ON id ON Ŧ 🕤 Id idUserUpdated Ŧ reasonCode Id User Updated idTicketParent OFF 🔲 auto 1 3 PRIMARY/nadyau ticketType OFF

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

Override Matching Page

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

Instance Details Panel

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

Table List + New	Table 🖉 Edit Table 🔒 Delete			
Source	OmniSource			
Table	Worker			
Name	Workers			
Record Name	Worker Name for single table re	ecord		
Grid Result View 🗙 Breadcrumb View 🗶	Guick Details View Full Info View Record Prop Cases Popup View Case Properties View Ma	erties View 🗙 nual Override Pop	Advanced Search View X Related Instances View X sup View X Grouped Grid View X + Add view +	
	Included:		Excluded:	
	activeFlagCode 🖋 🗙		activeFlagCodeld a	Â
	activeFlagCodeDescription 🖋 🛛 🗙		ambulatory StatusCodeld 🌶	ш
	omniCreatedDate / X		blindCodeld /	
	omniModifiedDate 🖋 🗙		careLanguageCodeid 🖋	
	omni Status 🌶 🛛 🗙		citizenshipCodeld /	
	omniStatusReason / ×		countryCodeld a	
	version 🖉 🛛 🗙		countyRegionCodeld 🖋	
	sourceCreatedBy / ×		deafCodeld 🌶	
	sourceCreatedDate 🖋 🛛 🗙		deceasedCodeld 🖋	
	sourceName / ×		employeeID 🌶	
	sourceModifiedBy 🖋 🗙	-	englishFluencyCodeld 🖋	-
	Group 2			

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

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

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

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

Case Properties Panel

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

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

III Table List + New	Table 📝 Edit Table 🗟 Delete			0 H
Source	OmniSource			
Table	WfCase			
Name	Wf Cases			
Record Name	Wf Case Name for single tab	sle record		
Grid Result View X Related Instances View 3	Quick Details View 🕷 Full Info View 🕷 Record I & Breadcrumb View 🕷 Cases Popup View 🕷	Properties View X Case Properties Vie	Advanced Search View X Frequent Search View X + Add view +	
	Included:		Excluded:	
	id 🖋	>>	assignmentDT 🌶	
	currentState 🖋	×	closedFlag 🖋	
	idUser 🖋	×	documentName 🖋	
	idUserCreated 🖋	×	documentReference J	
	caseType 🖋	×	fullName 🖋	E
	casename 🌶	×	idUserUpdated 🖋	
	createDT 🧨	×	instanceCount /	
	updateDT 🖋	×	queueName 🖋	
			record Status 🖋	
			sourceName s	
			ssn 🌶	Ŧ
	Group 2			

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

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

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

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

Manual Cleansing Page

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

Workspace Panel

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

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

📰 Table List 🛛 🕂 New	Table 🖌 Edit Table 🔋 Delete			
Source	OmniSource			
Table	Worker			
Name	Workers			
Record Name	Worker Name for single table	record		
Grid Result View 🗶 Breadcrumb View 🗶	Quick Details View X Full Info View X Record Private	operties View X Ianual Override Pop	Advanced Search View 🕷 Related Instances View 🕷 nup View 📽 Grouped Grid View 🕷 + Add view 🕶	
	Included:	I	Excluded:	
	activeFlagCode 🖋		activeFlagCodeld a] î
	activeFlagCodeDescription 2	•	ambulatory StatusCodeld 🖋	Ξ
	omniCreatedDate 🖋	<u>د</u>	blindCodeld /	
	omniModifiedDate 🖋	<	careLanguageCodeld 🖋	
	omni Status 🌶	4	citizenshipCodeld /	
	omniStatusReason 🖋	د.	countryCodeld A	
	version 🥒	د.	countyRegionCodeld A	
	sourceCreatedBy A	د.	deafCodeId 🌶	
	sourceCreatedDate 🖋	<u>د</u>	deceasedCodeId 🥒	
	sourceName 🖋	د.	employeeID 🌶	
	sourceModifiedBy 🖋	¢ -	englishFluencyCodeld /	-
	Group 2			

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

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

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

Ability to Allow/Prohibit Editing for Fields

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

Sources Views O	ptions Tables Table Sets	Settings	Exceptions			
+ New Column 🕜 Edit Column 🖀 Delete						
Name	activeFlagCode					
Description						
Title	Active Flag Code					
Table *	Workers					
Туре	String					
View	Full Info View					
Treat As	text					
Width						
Alignment	left					
Can Sort	ON					
Can Filter	ON					
Can Edit	OFF					
Is Visible	ON					
	Update Delete Reset					

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

Case Properties Panel

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

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

III Table List + New	Table / Edit Table 🔒 Delete		0 H
Source	OmniSource		
Table	WfCase		
Name	Wf Cases		
Record Name	Wf Case Name for single table record		
Grid Result View X	Quick Details View 🗶 Full Info View 🗶 Record Properties Vi	New X Advanced Search View X Frequent Search View X	
Related Instances View	Breadcrumb View X Cases Popup View X Case Pro	operties View 🗶 🔸 Add view 👻	
	Included: 1	Excluded:	
	id 🖉 🗡	assignmentDT /	
	currentState 🖉 🛛 🗙	closedFlag 🖋	
	idUser 🖉 🗶	documentName 🖋	
	idUserCreated 🖋 🗶	documentReference s	
	caseType 🖋 🗙	fullName 🧨 🗧	
	casename 🖍 🛛 🗙	idUserUpdated 🌮	
	createDT 🖋 🗶	instanceCount 🥒	
	updateDT 🖋 🗙	queueName 🧨	
		record Status /	
		sourceName 🖋	
		ssn /	
	Group 2		

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

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

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

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

General Issue Page

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

Workspace Panel

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

The table con-	sists of many	views Click	Full Info	View as s	shown in th	he following image
	51515 UI IIIaliy			view, as a		ie ionowing image.

III Table List	Table Fidit Table 🗟 Delete			
Source	OmniSource			
Table	Worker			
Name	Workers			
Record Name	Worker Name for single tabl	e record		
Grid Result View 🐰 Breadcrumb View 🎗	Quick Details View X Full Info View X Record F Cases Popup View X Case Properties View X Case Properties View X	Properties View 🗙 Manual Override Pop	Advanced Search View X Related Instances View X pup View X Grouped Grid View X + Add view *	2
	Included:		Excluded:	
	activeFlagCode 🖋	× 🕶 💌	activeFlagCodeld /	1
	activeFlagCodeDescription 🖋	×	ambulatory StatusCodeld 🌶	Ξ
	omniCreatedDate 🌶	×	blindCodeld /	
	omniModifiedDate 🖋	×	careLanguageCodeld 🖋	
	omni Status 🖋	×	citizenshipCodeld 🖋	
	omni Status Reason 🖋	×	countryCodeld /	
	version 🖋	×	countyRegionCodeld a	
	sourceCreatedBy 🖋	×	deafCodeld 🖋	
	sourceCreatedDate s	×	deceasedCodeld 🖋	
	sourceName 🖋	×	employeeID 🖋	
	sourceModifiedBy 🖋	× -	englishFluencyCodeld <i>d</i>	Ŧ
	Group 2			

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

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

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

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

Case Properties Panel

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

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

III Table List + New	Table 🖌 Edit Table 😫 Delete	•
Source	OmniSource	
Table	WfCase	
Name	Wf Cases	
Record Name	Wf Case Name for single table record	
Grid Result View 🕷	Quick Details View 🗶 Full Info View 🗶 Record Properties View 🗶	Advanced Search View 💥 Frequent Search View 💥
Related Instances View	Breadcrumb View X Cases Popup View X Case Properties Vi	iew 🗶 🔸 Add view 👻
	Included:	Excluded:
	id 🖉 🛛 👻	assignmentDT /
	currentState 🖋 🗶	closedFlag s
	idUser 🖋 🗶	documentName s
	idUserCreated 🖋 🗶	documentReference J
	caseType 🖍 🗙 🗙	fullName 🖍 🗄
	casename 🖍 🛛 🗙	idUserUpdated 🖋
	createDT 🖋 🗶	instanceCount /
	updateDT 🖍 🗙	queueName 🖋
		record Status 🌶
		sourceName 🖋
		ssn 🧨
	Group 2	

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

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

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

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

Issues Pop Up

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

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

The consists of many views. Click Quick Details View.

Record Name	Wf Case Name for single table	record		
Grid Result View 🗶 🛛 🔾	Quick Details View 🗶 Full Info View 🗶 Record Pro	perties View 🗙	Advanced Search View 🗶 🛛 Frequent Search View 🗶	
Related Instances View X	Breadcrumb View X Case Properties View X	+ Add view +		
	Included:		Excluded:	
	createDT /	× < >>	sourceName 🖋	^
	assignmentDT	×	ssn 🖋	
	closedFlag 🖋	×	caseType 🖋	
	updateDT 🖋	×	casename 🖋	
			currentState 🖋	
			documentName 🖋	
			documentReference 🖋	
			fuliName 🌶	
			id 🖋	
			idUser 🖋	
			idUserCreated 🥒	v
	Group			

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

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

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

Domain Grid Configuration

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

1 arces Views (Options Tables	Table Order	Settings E	Excep	ptions					
Table List + Ne	w Table								O H	slp
Name				50	urce	0	Entity Type			0
Patient Masters					nniSource		PatientMaster			
Patients				On	nniSource		Patient			
Person Address Masters				On	nniSource		PersonAddressMaste	r		
Person Name Masters				On	nniSource		PersonNameMaster			
Person Addresses				On	nniSource		PersonAddress			
Person Names				Or	niSource		PersonName			
Providers				On	nniSource		Provider			
Drovider Masters				0	nišource		Droviderbäster			
Derson Identifier Master				0	niSource		Personidantifacturarte	<i>u</i>		
Derson Contact Method	Lindara			0	niiSource		DemonContactMelhor	a dhahar		
Person Contact Method	Masters			On on	nnisource		PersonContactivetho	amaster		
2 Inces Views (Options Tables	Table Order	Settings t	Excep	ptions					
III Table List + Ne	w Table 🖌 Edit	Table 🔒 Do	slete						9 H	зlp
UEMID * First Name	Middle Name 0	Last Name 0	Date Of Birth	-	Address ¢	City 0	State/Province	Postal Code 0	Omni Modified Date	2
10 Elaine	Sophia	Biers	1954-05- 10T00:00:00+02	2:00	119 Boot Hills Road	Portland	Oregon	96553	2015-04- 22T17:30:26.07+03:00	
13 Emily	Sophia	Biers	1977-07- 22T00:00:00+0	2:00	24556 BROOKWOOD HILLS RD	Athens	Illinois	62613	2015-04- 22T17:33:09:633+03:00	
15 Glanni	1	Kidd	1985-03- 22T00:00:00+0	2:00	611 E 6TH ST	AUSTIN	Texas	78701-3715	2015-04- 22T17;30;47,86+03:00	
17 Jane	E	Bruno	1965-02- 21T00:00:00+0	2:00	4000 East Ave	Livonia	New York	14488	2015-04- 30T12:32:56:393+03:00	
21 Justice	F	Murillo	1988-07- 04T00:00:00+0	3:00	1467 S WESTGATE	LOS ANGELES	California	90025-2209	2015-04- 22T17:30:48.113+03:00	
3 Bi Ro Inch Inch Inch Inch Inch Inch Inch Inch	eadcrumb View X cord Properties View ded: Demographics stikame / ddlekiame / islame / islame / islame /	Related Instanc	tes View X Fin New X Quick I X X X X X X	Cetuer	t Search View X is View X Grid Gri	Advanced S Result View X scluded: adoptedCodel ambulatory St baidDebtCode bilindCodeld # careLanguage citizenshipCo	iearch View X + Add view + Md / abusCodeld / hCodeld / deid /		•	

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

1. Find the required table in the list of tables. Omni Governance Console Administration User's Guide

- 2. Edit the table.
- 3. Click Full Info View

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

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

cluded:		Excluded:	
Demographics	x * < >>	adoptedCodeld 🖋	<u>^</u>
firstName 🖋	×	ambulatory StatusCodeld 🖋	
middleName 🖋	×	badDebtCodeld 🖋	
lastName 🖋	×	blindCodeld 🌶	
fuliName 🖋	×	careLanguageCodeld 🖋	
suffix a	×	citizenshipCodeld a	
prefix 🖋	×	countryCodeld 🖋	
title 🖋	×	countyRegionCodeld a	
dateOfBirth 🖋	×	deafCodeld 🖋	
ssn 🖋	×	deceasedCodeld 🖋	
addressLine1	× .	disabilityCodeld 🖋	
addressLine1	× .	disabilityCodeld 🖋	
addressLine1		disabilityCodeld > Excluded: adoptedCodeld >	•
addressLine1 2 roup New Group Cluded: milCategoryCode 2 milCategoryCode 2	× •	Excluded: adoptedCodeid / ambulatory StatusCodeid /	·
addressLine1 2 roup New Group Cluded: milCategoryCode 2 milCategoryCode 3 milCategor	x v	disabilityCodeld Excluded: adoptedCodeld ambulatoryStatusCodeld badDebtCodeld	·
addressLine1 * Toup Toup Vew Group Cluded: milCategoryCode * milCategoryCode # milComponentCode # milComponentCode # milComponentCode #	X V	disabilityCodeld / Excluded: adoptedCodeld / ambulatoryStatusCodeld / badDebtCodeld / bilndCodeld /	
addressLine1 & roup New Group cluded: milCategoryCode milCategoryCode milComponentCode milComponentCode milComponentCode milComponentCode milPayGrade	X V	disabilityCodeld / Excluded: adoptedCodeld / ambulatoryStatusCodeld / badDebtCodeld / blindCodeld / careLanguageCodeld /	
addressLine1 * Toup Toup Toup Tew Group Cluded: milCategoryCode * milCategoryCode Pescription * milComponentCode * milComponentCode Pescription * milPayGrade * Tem New Group	X V	disabilityCodeld / Excluded: adoptedCodeld / ambulatoryStatusCodeld / badDebtCodeld / blindCodeld / careLanguageCodeld / citizenshipCodeld /	
addressLine1 2 oup lew Group cluded: milCategoryCode 2 milCategoryCode 2 milComponentCode 2 milComponentCode 2 milPayGrade 2 New Group milRankCode 2	X V	disabilityCodeld / Excluded: adoptedCodeld / ambulatoryStatusCodeld / badDebtCodeld / blindCodeld / careLanguageCodeld / citizenshipCodeld / countryCodeld /	
addressLine1 2 roup tew Group cluded: milCategoryCode 2 milCategoryCode 2 milCategoryCode 2 milComponentCode 2 milComponentCode 2 milComponentCode 2 milPayGrade 2 F New Group milRankCode 2 milRankCode 2	X V	disabilityCodeld / Excluded: adoptedCodeld / ambulatoryStatusCodeld / badDebtCodeld / blindCodeld / careLanguageCodeld / cittzenshipCodeld / countryCodeld / countryCodeld / countryRegionCodeld /	
addressLine1 & roup Rew Group cluded: milCategoryCode milCategoryCode milComponentCode milComponentCode milPayGrade m	X V	disabilityCodeld / Excluded: adoptedCodeld / ambulatoryStatusCodeld / badDebtCodeld / blindCodeld / careLanguageCodeld / citizenshipCodeld / countryCodeld / countryCodeld / deatCodeld /	
addressLine1 2 roup roup New Group New Group ncluded: milCategoryCode 2 milCategoryCodeDescription 2 milComponentCode 2 milComponentCode 2 milPayGrade 2 Time Group milRankCodeDescription 2 milVeteranStatusCode 3 milVeteranStatusCode 3 milVeteranStatusCodeDescription 3 milVeteranStatusCodeDescriptionStatu	X V	disabilityCodeld / Excluded: adoptedCodeld / ambulatoryStatusCodeld / badDebtCodeld / blindCodeld / careLanguageCodeld / citizenshipCodeld / countryCodeld / countryCodeld / deatCodeld / decasedCodeld /	

Breadcrumbs Configuration

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

			New	Golden F
Sources Mours On		o Ordor	Cottingo	Even
Sources views Op	ions rabies rabi	e Order	Settings	Excep
III Tables List 🕂 New	Table / Edit Table	1 Del	ete	
Source	OmniSource			
Table	WfCase			
Name	Wf Cases			
Record Name	Wf Case			
Info Tab Indicator	OFF			
Is Logged	ON			
Use multiselect for default values	ON			
Case Properties View X	Breadcrumb View 🗙	Adva	nced Searcl	h View ≫
All Cases Filter View 🗙	Case Issues Grid View	v × +	Add view -	
Included:				
id @		*	<<	>>
		-		
createD I 🖉		×		

Sub-domains Configuration

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

cases /
instances 🖋



Enhanced Access Security: Column-Based and Row-Based

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

In this appendix:

- Overview
- Configuring Enhanced Security
- Enabling Enhanced Security
- Configuring Column-based Security
- Configuring Row-Based Access Security
- Supporting Enhanced Security Using WSO2 Identity Server
- Merging and Reorganizing Column Sets

Overview

As of Omni-Gen version 3.6, enhanced security for the 360 Viewer and Remediation applications in the Omni Governance Console (OGC) is available in two forms (Column-based access security and Row-based access security).

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

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

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

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

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

Configuring Enhanced Security

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

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

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

🖵 id

- company_name
- first_name
- Iast_name
- credit_rating
- primary_geo_area

	ssn_	TIN
--	------	-----

Use multiselect for ON default values	
Grouped Grid View X Manual Override Popup View X	Case Properties View X
Related Instances View X Frequent Search View X	Advanced Search View 🗶
Quick Details View 🗶 Grid Result View 🗶 My Cases	Filter View 🗶 🛛 All Case:
Ticket Issues Grid View X DQM Filters X DQM Brea	ikouts 🗱 DQM Grid Vie
Grouping Search View 🗶 🛛 + Add view 👻	
Included:	Excluded:
id 🖋 🔹 🗙	<< >> Masteri
company_name 🖋 🛛 🗙	Master
first_name / ×	Master
last_name 🖉 🛛 🗙	Master
credit_rating 🖋 🛛 🗙	Master
primary_geo_area 🖋 🗙 🗙	Master
ssn_TIN 🖋 🛛 🗙	OmniCr

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

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

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

				iper_a (Data Superviso	r, group.one, lob.supp	lier.retail, lob.supplier.	sales, Pu	Logout 🕐 -
🔊 360 View	er Supplier	Master - Advan	ced Search +					
Supplier Master	1110					New Do	ocument	Linking
Showing 1-20 of 1,110	records. Number of rec	ords per page 20 🔹					123456	7 8 9 10 🕨
ld ^	Company_name \$	First_name \$	Last_name \$	Credit_rating \$	Primary _ geo ¢	Ssn_TIN \$	Issues	Actions
SupplierMaste	Driven Drawing Inc.	Susie	Kanipe	A-2	South	487-23-0023	92	۵ 🌶
SupplierMaste	Adhesive Coll Inc	Colombain	Persad	Prime	D		92	۵ 🌶
SupplierMaste	Purification Gene	Clarinda	Javarone	В	Mountain	529-25-0025	92	۵ 🌶
SupplierMaste	Broughty Plastics	Beata	Kroell	A-1+	MidAtlantic	489-09-0009	2 8	•
 SupplierMaste 	Fixit Ayre Co.	Shyanne	Kocian	B+	West	019-19-0019	8 👳	3 <i>p</i>
SupplierMaste	Cassette Charteri	Rolande	Navy	A-2	South	313-07-0007	۰.	•
SupplierMaste	Shops Dataconne	Lothaire	Borkoski	A-2	South	313-07-0007	92	•
SupplierMaste	Autostyling Disc Co	Dan	Pinkley	A-3	West	534-50-0050	٠	•
SupplierMaste	Awning John Co	Darci	Haaby	C+	Mountain	123-34-0034	2 8	•
SupplierMaste	Tubs Woodhouse	Laurissa	Gragas	A-1+	Northeast	474-26-0026	•	•

Enabling Enhanced Security

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

ØmniConsole ≡	¢ Co	nfigura	tion: Serv	ices						
og Services	Controller	Server	Cleansing	Matching	Merging	Remediation	Workbench Cleansing	OGC Torncat	OGC WS02	
& Configuration	Elastic Sea	irch							J	
Comgaration	Settin	ng			Value					
Runtime	reposervice.username				super					
Databases	repos	service.pa	ssword							
Managed Services Product Info	Column Based Authorization Enable				false					
Deployment Processing	Row Criteria Based Authorization Enable				false					
	sso.	Active			true					

The settings are listed and labeled as follows:

Column Based Authorization Enable

Given State Row Criteria Based Authorization Enable

To enable individual or both enhanced security settings:

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

ØmniConsole ≡	🔅 Co	nfigura	ation: Ser	vices				
© Services	Controller	Server	Cleansing	Matching	Merging	Remediation	Workbench Cleansing	OGC Tomcat
Configuration •	OGC Reme	diation	Repository	Deployment	Elastic	Search		
, comgeneration	Setti	ng		Va	alue			
Runtime	group	ping confi	g db url	id	hrienleania	c//omniserv14-1	133:databasename=0G3	621/MisendStringP
Databases	arou	C	olumn B	ased A	uthoriz	ation En	able	*
Managed Services	g,	v	alue:	true				
Product Info	group	ping E	xpanded Value	a: false				¥
	repos	servi P	roperty:	serv	er.ogctc.col	umn.criteria.auth	norization.enable	
Deployment		D	escription:	Colu	mn Based /	Authorization En	able	
Processing	repos	lerv:						
System Logs	Colu	mn E	• Update	× Cancel				
* Testing	Row Enab	Criteria E	ased Authoriza	ation fa	lse			

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

Montion: Services S		
The setting was successfully updated. PLEASE NOTE: You must restart the Controller and OmniServer for related changes to take effect!		

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

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



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

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

360 Viewer Remediation Workbench Grouping Administration	super_a (Data Supervisor, group.one, Job.supplier.retail, Job.supplier.sales, Pu Logout 🔞 -
360 Viewer Supplier Master - Artvanced Search -	
Supplier Master (1110)	New Document Linking
Showing 1-20 of 1,110 records. Number of records per page 20 •	
Issues	Actions
	• Z
	• ×
9	o /
9	o 7
	0 ž
9	• ×
25	۵ 🌶
25	• ž
	<u>ه</u> ک
	• 2
	• X
25	۵ 🗡
	• X
	• ž
9 8	• ×

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

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

□ All four users should see five of the seven columns.
- □ Only user Super_a is cleared to access the two sensitive columns (credit_rating and ssn_TIN).
- User Super_b can see the five columns and the ssn_TIN column.

Configuring Column-based Security

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

360 Viewer Remediation Workbench	Grouping Administration		super_a (Data Supervisor, group.one, lob.supplier.retail, lob.supp					
Sources	Views Options Tables Table C	order Settings Exceptions	Security					
📰 Table	III Table List 🕈 New Table							
Name		÷ Source ÷	Entity Type ÷					
Wf Case	s	OGCSource	WfCase					
Wf Reme	edy Refs	OGCSource	WfRemedyRef					
Wf Ticke	ts	OGCSource	WfTicket					
Wf Event	s	OGCSource	WfEvent					
Source C	Code	OGCSource	SourceCode					
Source C	Code Map	OGCSource	SourceCodeMap					
Source C	Code Relation	OGCSource	SourceCodeRelation					
Source C	Code Set	OGCSource	SourceCodeSet					
Source C	Code Standard	OGCSource	SourceCodeStandard					
Contract		OGCSource	Contract					
1 2	3 4 5 Next		1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -					
✿ Home ☑ Contac	쇼 Download Metadata ts 쇼 Upload Metadata	 DDP Setup DDP Add Data to Subjec DDP Add Subject 	G Back to top					

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

Configuring Column Access

The Enhanced Security management tool consists of the following sections:

□ domains list (located on the left pane)

column sets editor (located on the right pane)

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

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

Procedure: How to Add a New Column Set

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

To add a new column set:

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

360 Viewer Remediation	Workbench Grouping	Administration	super_a (Data Supervisor, group.one, lob.supplier.retail, Logout 🕐 -
	Sources Views (Dptions Tables Table Order Settings Exceptions Security	
			Help
	Supplier Contact Master	Supplier Master	+ Add Column Set
	Supplier Email		
	Supplier Email Master		
	Supplier Master	No column sets found	
	Supplier Phone		
	Supplier Phone Master		
	Supplier Supplier _ Alt _ Id		
	Supplier Supplier _ Alt _ Id Master		

2. Click Add Column Set.

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

Sources Views C	Options Tables Tabl	le Order Settings	Exceptions	Security		
						O Help
Supplier Address Maste	Supplier Master	r				+ Add Column Se
Supplier Contact	▼ Column set 1				Details	Save Delete
Supplier Contact Master	Users					
Supplier Email	Pléase seleci a u	isers				
Supplier Email Master	Company_nam	s Show Data				
Supplier Master	Credit_rating	₩ All				
Supplier Phone	Credit_rating D	Description 🐺 All				
	Credit_rating k	d 📼 All				
Supplier Phone Master	Dba_name					
Supplier Supplier _ Alt _	First_name	Ţ All				
Id	Full_name					
Supplier Supplier _ Alt _	General Issue	₩ All				
in mester	id id	Ţ AII				
Supplier Supplier _ Item	Last_name	₩ All				
Supplier Supplier _ Item	Legal_class_t	type 😇 All				
Master	Legal class (type Desc All				

A new column set consists of the following:

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

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

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

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

6. Click Save.

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

Sources Views	Options Tables Table Order	Settings	Exceptions	Security							
	● Help										
Supplier Contact	Supplier Master					+ Add Column Set					
Supplier Contact Master	▼ Column set 1 Users				Details	Save Delete					
Supplier Email	PRIMARY/ds_a × PRIM	1ARY/ds_b×									
Supplier Email Master	Show Columns	Show Data									
	Company _ name	Ţ AII									
Supplier Master	Credit_rating	Ţ All									
Supplier Phone	Credit _ rating Description	Ţ All									
	Credit _ rating Id	Ţ AII									
Supplier Phone Master	Dba_name	Ţ All									
Supplier Supplier	First_name	Ţ All									
Alt_Id	Full_name	Ţ All									
Supplier Supplier _	General Issue	Ţ All									
Alt _ Id Master	✓ Id	Ţ AII									

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

360 Viewer Remediation Data Quality Mo	nitor Workbench Grouping Administra	tion	da_b (Data Stews	rd, group two, lob supplier retail, lob supplier sales, Sy	stem Le	gout () -			
360 Viewer Supplier Master •	Advanced Search -								
Supplier Master 💷 🧳				New Docur	nent) 📃 L	inking			
Showing 1-20 of 1,110 records. Number of records per page 20 •									
1d a	Company _ name \$	First_name 0	Last_name \$	Primary _ geo _ area 🕴	Issues	Actions			
 SupplierMaster:10 	Driven Drawing Inc.	Susie	Kanipe	South	9	82			
 SupplierMaster:100 	Adhesive Coll Incorporated	Colombain	Persad	0	2	• 2			
 SupplierMaster:1000 	Purification Generis Ltd.	Clarinda	Javarone	Mountain	9	- P			
 SupplierMaster:1002 	Broughty Plastics Ltd.	Deata	Kroell	MidAtlantic	N . 10	• 2			
 SupplierMaster:1004 	Fixit Ayre Co.	Shyanne	Kopian	West	N 9	• 2			
 SupplierMaster:1006 	Cassette Chartering Inc.	Rolande	Navy	South	\$ ³	• ×			
 SupplierMaster:1007 	Shops Dataconnect Inc.	Lothaire	Borkoski	South	\$P	• 2			
 SupplierMaster:1009 	Autostyling Disc Co	Dan	Pinkley	West	\$P	0.2			
 SupplierMaster:1011 	Awning John Co	Darol	Haaby	Mountain	9 8	• 2			
 SupplierMaster:1013 	Tubs Woodhouse Inc.	Laurissa	Gragas	Northeast	9	• 2			
 SupplierMaster:1015 	Lings Coldrooms inc.	Dinah	Weafer	Midwest	9 8	• 2			
 SupplierMaster:1017 	Airee Connection Co.	Karle	Rivin	Northeast	9	e 2			
 SupplierMaster:1019 	Night Modiate Inc.	Kalen	Schleis	MidAslantis	9				
 SupplierMaster:102 	Wendy Translation Co.	E∨s	Jungwith	0	9				
 SupplierMaster:1021 	Scaffold Cwmbran Ltd.	Peronela	Backe	Mountain	51				
 SupplierMaster:1023 	Measurement Entron Inc.	Marcellus	Ordonez	Mountain	2	52			

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

	360 Viewer	Remediation	Dat	ta Quality Monito	r Workbench	G	irouping A	•
	🛞 360 Vie	ewer	Suppli	er Master 👻	Advanced Search			
	Supplier Maste	er 1110 🔒						
12-02	Showing 1-20 of 1	1,110 records. Nun	nber of n	ecords per page	20 🔻			
	ld		÷	Company _ nar	ne	÷	First _ name	
8.14								
1.00	 SupplierMaste 	er: 10		Driven Drawing	Inc.		Susie	
14 - 18 S	 SupplierMaste 	er:100		Adhesive Coll In	corporated		Colombain	

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

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

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

Sources Views	Options	Tables	Table Order	Settings	Exceptions	Security				
								O Help		
Address _ DUNS Master	ŝ	upplier M	aster					+ Add Column Set		
Supplier Address Master	•	Column set	1				Details	Save Delete		
Supplier Contact	•	▼ Column set 2 Details Save Detet								
Supplier Contact Master		PRIMARY	″/ds_a ×							
		Show C	olumns	Show Data						
Supplier Email		Company	y_name	= All						
Supplier Email		Credit_r	rating	= All						
Master		Credit_r	rating Description	₩ All						
Supplier Master		Credit_r	rating Id	₩ All						

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

360 Viewer Remediation	Data Quality Monitor Workb	ench Grouping Administr	ation		super_a (Data Supervisor, group	one, lob supplier retail, lob supplier s	ales, Pu L	.ogout 🕐 -		
360 Viewer	Supplier Master - Advanced S									
Supplier Master (1110)						New Do	oument	Linking		
Showing 1-20 of 1,110 records. Numb	newsg 1-20 of 1.110 neords. Number of records per page 20 •									
ld o	Company_name 0	First_name 0	Last_name 0	Credit_rating 0	Primary_geo_area 0	Ssn_TIN 0	Issues	Actions		
 SupplierMaster:10 	Driven Drawing Inc.	Susie	Kanipe	A-2	South	487-23-0023	ψ.			
 SupplierMaster:100 	Adhesive Coll Incorporated	Colombain	Persad	Prime	0		41			
 SupplierMaster: 1000 	Punfeation Generis Ltd.	Clarinda	Javarone	8	Mountain	529-25-0025	\$2			
 SupplierMaster:1002 	Broughty Plastics Ltd.	Beata	Kroel	A-1+	MidAtlantic	489-09-0009	49 - 85			
 SupplierMaster:1004 	Fixit Ayre Co.	Shyanne	Koolan	8+	West	019-19-0019	$\mathbf{S}_{\mathbf{k}} = \mathbf{S}_{\mathbf{k}}$	10 P		
 SupplierMaster: 1006 	Cassette Chartering Inc.	Rolande	Navy	A-2	South	313-07-0007	v			
SupplierMaster:1007	Shops Dataconnect Inc.	Lohaire	Borkoski	A-2	South	313-07-0007	2	- a 2		
SupplierMaster:1007	Autostyling Disc Co	Dan	Pinkley	A-3	West	534-50-0050	49			
SupplierMaster:1011	Awning John Co	Daroi	Haaby	C+	Mountain	123-34-0034	8 - 8			
 SupplierMaster:1013 	Tubs Woodhouse Inc.	Laurissa	Oragas	A-1+	Northeast	474-28-0028	\$ ¹	e 2		
 SupplierMaster: 1015 	Lings Coldrooms Inc.	Dinah	Weafer	A-2	Midwest	550-59-0059	29 - 85			
 SupplierMaster:1017 	Airoo Connection Co.	Karie	Rivin	C+	Northeast	015-22-0022	49	• 2		
 SupplierMaster:1019 	Night Modiste Inc.	Kalen	Schleis	8+	MidAtlantio	098-86-0088	41			
SupplierMaster:102	Wendy Translation Co.	Elvis	Jungwith	Prime	c	399-29-0029	29 29	S P		
SupplierMaster:1021	Scattold Cwmbran Ltd.	Petronella	Backe	8+	Mountain	214-85-0085	49	•		
 SupplierMaster:1023 	Measurement Entron Inc.	Marcellus	Ordonez	A-3	Mountain	249-18-0018	49	B		

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

Sources Views	Opti	ons	Tables	Table Order	Settings	Exceptions	Security			
										😧 Help
Supplier Contact	•	Sup	plier M	aster					+ Add Col	lumn Set
Supplier Email		► Co	olumn set	1				Details	Save	elete
Supplier Email Master		► C	olumn set	2				Details	Save D	elete
Supplier Master										
Supplier Email Supplier Email Master Supplier Master			olumn set	2				Details	Save D	elet

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

Sources Views	ptions Tables Table Order	Settings Exceptions Security	1
			O Help
Supplier Contact	Supplier Master		+ Add Column Set
Supplier Email	► Column set 1		Details Save Delete
Supplier Email Master	► Column set 2	Details Save Delete	
Supplier Master	▼ Column set 3 Users	Details Save Delete	
Supplier Phone	PRIMARY/super_b ×		
Supplier Phone	Show Columns	Show Data	
Master	Company_name	₩ All	
Supplier Supplier _	Credit_rating	₩ All	
Alt_Id	Credit _ rating Description	₩ All	
Supplier Supplier _	Credit_rating Id	₩ All	
	Dba_name	₩ AII	

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

363 Viewer Remediation Data Q	uality Monitor Workbench Groupir	ng Administration		super_b (Data Supervisor	group two, lob supplier retail, lob supplier sa	les, Sy L	ogout 🛈 -				
360 Viewer Suppler	Master - Advanced Search -										
Supplier Master (1110)	Long										
Showing 1-20 of 1,110 records. Number of rec	Showing 1-00 of 1,110 records Number of records per page 20 •										
N D	Company_name 8	First_name \$	Last_name 0	Primary _ geo _ area t	5sn_TIN 6	Issues	Actions				
 SupplierMaster:10 	Driven Drawing Inc.	Susie	Kanipe	South	487-23-0023	\$P	• 2				
 SupplierMaster:100 	Achesive Coll Incorporated	Colombain	Persad	D		۶.	• 2				
SupplierMaster:1000	Purification Generis Ltd.	Clarinda	Javarone	Mountain	529-25-0025	€P.	• 2				
SupplierMaster:1002	Broughty Plastics Ltd.	Beata	Kroell	MidAtlantio	439-09-0009	9 B	3 2				
 SupplierMaster:1004 	Fixit Ayre Co.	Shyanne	Kecian	West	019-19-0019	9 B	• 2				
 SupplierMaster:1008 	Cassette Chartering Inc.	Rolande	Navy	South	313-07-0007	2	- a p				
 SupplierMaster:1007 	Shops Dataconnect Inc.	Lothaire	Borkoski	South	313-07-0007	ν	• 2				
 SupplierMaster:1009 	Autostyling Disc Co	Dan	Pinkley	West	534-50-0050	\$ ³	• 2				
 SupplerMaster:1011 	Awning John Co	Daroi	Навоу	Mountain	123-34-0034	2 8	• 2				
 SupplierMaster:1013 	Tubs Wooshouse Inc.	Laurissa	Gragas	Northeast	474-26-0026	\$P	• 2				
 SupplierMaster:1015 	Lings Coldrooms Inc.	Dinah	Weater	Midwest	550-5e-005e	9 B	• 2				
SupplerMaster:1017	Airoo Connection Co.	Karie	Rivin	Northeast	015-22-0022	e.	•				
SupplierMaster:1019	Night Modiste Inc.	Kalen	Schleis	MidAtlantio	098-86-0086	10 ¹					
SupplierMaster:102	Wendy Translation Co.	Dvs	Jungwith	c	309-29-0029	ψ.	•				
 SupplierMaster:1021 	Scaffold Cwmbran Ltd.	Petronela	Backe	Mountain	214-85-0085	\$ ³	• 2				

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

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

Configuring Row-Based Access Security

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

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

360 Viewer	Remediation	Data Quality Monitor	Workb	ench G	rouping	Administra	ation
쪬 360 Vie	wer	Supplier Master 👻 🗛	vanced Se	earch 🛉 🔶			
Supplier Mast	er (1110)						
Showing 1-20 of 1	,110 records. Numb	per of records per page 20	•				
Id	\$	Company _ name	÷	First_nam	ie	¢.	Last_n
 SupplierMaste 	r:10	Driven Drawing Inc.		Susie			Kanipe
► SupplierMaste	r:100	Adhesive Coll Incorporated		Colombain			Persad

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

Procedure: How to Configure Row-based Access Security

To configure row-based access security:

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

Note that in this example, there are three other Supplier Master Column sets.

2. Expand the desired Column set (for example, Column set 2).

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

Sources Views	Options	Tables	Table Order	Settings	Exceptions	Security	
							Help
Supplier Address	Î S	upplier M	laster				+ Add Column Set
Master		Omni Cr	reated Date	Ţ All			^
Supplier Contact		Omni M	odified Date	₩ All			
Supplier Contact		Owners	hip_type	Ţ All			
Master		Ownersh tion	hip _ type Descrip	Ţ All			
Supplier Email		Owners	hip_type Id	Ţ All			
Supplier Email Master	-	Prim_s	ales _ org Id	⊤ All			
ouppror critical inductor		Primary	_geo_area	Enter value	ues for column		
Supplier Master		Primary cription	_ geo _ area Des	Ţ All			
Supplier Phone		Drimany	deo area Id				

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

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

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

5. Click Save.

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

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

Procedure: How to Remove Individual Access Security Rules

To remove individual access security rules:

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

360 Viewer Remediation	Data Quality Monitor Workbe	nch Grouping Administrat	ion	super_b (Data Supervisor, group	two, lob.supplier.retail, lob.suppliers	ales, Sy L	ogout 🕐 -
360 Viewer	Supplier Master + Advanced Se	arch •					
Supplier Master 161 💡					New Do	cument	Linking
Showing 1-20 of 161 records. Number	of records per page 20 •					4 12345	6789 × ++
ld ¢	Company_name \$	First_name \$	Last_name \$	Primary _ geo _ area 🕴	Ssn_TIN 0	Issues	Actions
 SupplierMaster: 1004 	Fbit Ayre Co.	Shyanne	Kocian	West	019-19-0019	8 4	• 👂 🔺
 SupplierMaster:1009 	Autostyling Disc Co	Dan	Pinkley	West	534-50-0050	2	• >
 SupplierMaster: 1048 	Sparkes Braude Ltd.	Heliodoro	Crask	West	635-13-0013	2	• *
 SupplierMaster: 1054 	Companys Ropes Co	Chip	Kring	West	185-10-0010	Ð	• >
 SupplierMaster:1081 	Splicing Textron Ltd.	Karren	Oshima	West	612-63-0063	8	• 2
 SupplierMaster: 1111 	Liftings Servecon Limited	Antone	Agpaoa	West	019-63-0063	2 8	• *
 SupplierMaster: 1117 	Infotech Sucralose Inc.	Major	Schied	West	617-26-0026	5 8	• 2
 SupplierMaster:1119 	Darcy Mckinlay Ltd	Alban	Alsina	West	279-10-0010	9 B	• 2
 SupplierMaster: 1121 	Weekly Taylor Company	Quintin	Trevigne	West	000-76-0076	52	• *
 SupplierMaster: 1124 	Palmer Knottingley Ltd.	Augustus	Balogh	West	330-07-0007	8 9	0 ×
 SupplierMaster: 1126 	Foamtex Barns Company	Albertha	Vermitya	West	104-32-0032	8 V	• 2
 SupplierMaster; 1128 	Morrison Images Ltd.	Cathey	Albarracin	West	115-26-0026	2	

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

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

Sources Views	Options	Tables	Table Order	Settings	Exceptions	Security	
							Help
	Su	upplier M	aster				+ Add Column Set
Supplier Address Master		Omni Cr	eated Date	च All			•
Supplier Contact		Omni Ma	odified Date	Ţ All			
		Ownerst	nip_type	Ţ All			
Supplier Contact Master		Ownerst tion	nip_type Descrip	₩ All			
Supplier Email		Ownerst	nip_type Id	₩ All			
Supplier Email Master		Prim_s	ales _ org Id	Ţ All			
Supplier Email Master	_	 Primary 	_geo_area	West × S	South		
Supplier Master		Primary cription	_geo _ area Des	₩ All			

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

360 Viewer Remediation	Data Quality Monitor Workbe	nch Grouping Administrat	ion	super_b (Data Supervisor, group.	two, lob.supplier.retail, lob.supplier.s	ales, Sy	Logout ⑦ -			
360 Viewer	Supplier Master - Advanced Se	arch -								
Supplier Master 318 0	Suppler Master @10 1									
Showing 1-20 of 318 records, Number	of records per page 20 ·				-01-4	123456	78910 🕨 🗰			
ld 0	Company_name 0	First_name 0	Last_name 0	Primary _ geo _ area 🔹 🔹	Ssn_TIN 0	Issues	Actions			
 SupplierMaster: 10 	Driven Drawing Inc.	Susie	Kanipe	South	487-23-0023	2	• * *			
 SupplierMaster: 1004 	Fixit Ayre Co.	Shyanne	Kocian	West	019-19-0019	9 8	• *			
 SupplierMaster: 1006 	Cassette Chartering Inc.	Rolande	Navy	South	313-07-0007	2	• ×			
 SupplierMaster: 1007 	Shops Dataconnect Inc.	Lothaire	Barkaski	South	313-07-0007	9	• *			
 SupplierMaster: 1009 	Autostyling Disc Co	Dan	Pinkley	West	534-50-0050	2	• ×			
 SupplierMaster: 1027 	Telematics Tailby Co.	Carla	Ravizee	South	286-07-0007	9	0 ×			
 SupplierMaster: 1029 	Bending Omega Inc.	Joshuah	Mcclaren	South	692-01-0001	9				
 SupplierMaster: 1033 	Paul Groupage Co.	Kory	Deaner	South	659-13-0013	🧶 😣	0 ×			
 SupplierMaster: 1035 	Diagnostica Mcclelland Inc.	Manfred	Uribe	South	395-03-0003	9	• ž			
 SupplierMaster: 1048 	Sparkes Braude Ltd.	Heliodoro	Crask	West	635-13-0013	9	3 ×			
 SupplierMaster: 1054 	Companys Ropes Co	Chip	Kring	West	185-10-0010	9	• >			
 SupplierMaster: 1058 	Marline Homer Co	Leontine	Aust	South	611-64-0064	9	3 2			

Supporting Enhanced Security Using WSO2 Identity Server

After saving the settings, the appropriate roles are created and added to the corresponding users in the WSO2 Identity Server (WSO2 IS).

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

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

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

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

The following image shows sample security roles in the WSO2 IS.

Internal	Internal/dc.SupplierMaster.primaryGeographicArea						Column based role
Internal, << first	/dcc.Supp <prev< th=""><th>olier 1</th><th>Maste 2</th><th>er.ave 3</th><th>erageLeadt next ></th><th>imeDays.1 last >></th><th>Criteria based role</th></prev<>	olier 1	Maste 2	er.ave 3	erageLeadt next >	imeDays.1 last >>	Criteria based role

If required, you can create those roles manually in the WSO2 IS by following the naming conventions. The corresponding column set(s) will be created in the Administration console.

If a column set is no longer required, you can click the Delete button so that all related column set roles will be deleted from the corresponding users in the WSO2 IS.

Note: Created roles will still exist in the WSO2 IS, but they will not affect the user interface because they are unassigned.

Merging and Reorganizing Column Sets

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

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

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

Customer Address	Customer Address	+ Add Column Set
Customer Address Master	▼ Column set 1 Users	Save Delete
Customer Contact	Show Columns	Show Data
Customer Contact Master	Address _ geo _ area	Ţ All
Customer Cust	Address _ geo _ area Description	₩ All
Demographics	Address _ geo _ area Id	
Demographics Master	Address _ status Description	₩ All

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

Customer Address	Customer Address	+ Add Column Set
Customer Address Master	 ▼ Column set 2 Users 	Save Delete
Customer Contact	PRIMARY/ds_a ×	
Customer Contact Master	Show Columns	Show Data
	Address _ geo _ area	훅 All
Customer Cust Demographics	Address _ geo _ area Description	₩ All
	Address _ geo _ area Id	' ₩ All
Demographics Master	Address _ status	'≡ All

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

Customer	Customer Address	+ Add Column Set
Customer Account	Save Delete	
Customer Account Master	PRIMARY/ds_a × PRIM	IARY/super_a ×
Customer Account Team	Show Columns	Show Data
	Address _ geo _ area	₩ All
Customer Account Team Master	Address _ geo _ area Description	च All
	✓ Address _ geo _ area Id	'≡ All
Customer Address	Address _ status	'≡ All
Customer Address Master	Address _ status Description	₩ All

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

360 Viewer	Remediation	Data Quality Monitor	Workbench	Administration				Logout 🕜 -
🭘 360 Vie	ewer	Customer Master 👻	Advanced Search					
Home Id : Cust	tomerMaster:10			Salate Sale		at the test of the total to		Details 36
							💐 General Issue 🛛 🔏	Override Matching
		Golden F	Record 🤑		Ø Hide Instances	🤑 Instance Records 🗻 🗸		-
						1		O
Hide Record	rd Properties							
Expand All								
Account 0	mni Collection	Expand all						
Account Te	am Omni Collec	tion Expand all						
Address O	mni Collection	Expand all						
Ontact Or	nni Collection	Expand all						
Oust Demo	graphics Omni (Collection Expand all						

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



Configuring Single Sign-On

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

In this appendix:

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

Stopping the OGC Tomcat Service

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

OGC Services	
OGC Tomcat	OFF ON
WSO2	OFF ON

Unzipping the Single Sign-On Delivery Package

Unzip the ogc_sso.zip archive file to the following folder of your installation:

\omnigen\omniGenData

This will create the following subdirectory, which contains two .xml files:

\omnigen\omniGenData**sso**

Note: As of Omni-Gen version 3.10.0 and higher, the two .xml files in this subdirectory are included in the release packaging (in \omnigen\OmniGenData\sso), which avoids the need to install these files manually.

Configuring the context.xml Properties File and Creating Backup Files

Navigate to the following directory:

\omnigen\OmniGovConsole\conf

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

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

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

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

sso.properties

ogc-sp.xml

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

Editing the sso.properties File

Navigate to the following directory:

\omnigen\OmniGenData\sso

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

```
active = true (a)
userDomain = ibi (j)
SSO_DOMAIN_1 = PRIMARY (b)
SSO DOMAIN 2 = iway (b)
SSO_DOMAIN_3 = ibi (b)
keyManager.storeFile = file:/C:\omnigen\omnigendata\sso\wso2carbon.jks (C)
keyManager.storePass = wso2carbon
keyManager.passwords.wso2carbon = wso2carbon (d)
keyManager.passwords.wso2sign = wso2carbon
keyManager.passwords.wso2encr = wso2carbon
keyManager.defaultKey = wso2carbon
metadata.sp.file = \omnigen\omnigendata\sso\ogc-sp.xml (e)
metadata.sp.defaults.local = true
metadata.sp.defaults.alias = test.ibi.com (f)
metadata.sp.defaults.signingKey = wso2sign (g)
metadata.sp.defaults.encryptionKey = wso2encr (h)
metadata.providers.idp = \omnigen\omnigendata\sso\wso2-idp.xml (1)
```

Perform the following steps:

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

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

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

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

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

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

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

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

6. Edit the proper key values (g) and (h) that will be used in *Generating Certificates* on page 126. For example:

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

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

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

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

Generating Certificates

To generate certificates:

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

\omnigen\omnigendata\sso

4. Type the following:

keytool -genkey -alias wso2sign -keyalg RSA -keysize 2048 -keypass wso2carbon -storepass wso2carbon -validity 3650 -keystore wso2carbon.jks 5. Respond to the questions prompted by the *keytool* command using your site details, as shown in the following example:



- 6. Reply to the question *What is your first and last name?* with your Omni Governance Console (OGC) server's host name (for example, *iwserveribi.com*).
- 7. Use the *keytool* command to generate a new encryption certificate.
- 8. From the \sso subfolder, type the following:

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

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



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

[iwayqaßiwserv153 sso]\$	keytool -list -keystore wso2carbon.jks -storepass wso2carbon -alias wso2sign
vso2sign, Aug 25, 2016,	PrivateKeyBntry,
Certificate fingerprint	(SHA1): ED:83:92:58:01:93:B1:EA:1E:E1:26:6B:19:74:AB:3A:00:6D:E2:B0
[iwayqa@iwserv153 sso]\$	keytool -list -keystore wso2carbon.jks -storepass wso2carbon -alias wso2encr
wso2encr, Aug 25, 2016,	PrivateKeyEntry,
Certificate fingerprint	(SH&1): 60:F1:11:6D:E&:9B:8&:F5:34:97:FE:1F:E4:C7:14:C1:87:CC:18:C&

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

Exporting Certificates

To export certificates:

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

\omnigen\omnigendata\sso

2. Type the following:

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

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

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

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

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

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

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

1. Edit the ogc-sp.xml file.

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

Note that there are two long, multi-line strings in the <ds:X509Certificate> tags. These are the certificates that will be overwritten with the site-specific certificates that were created in *Generating Certificates* on page 126. Shortened versions of the certificates are shown in this sample for demonstration purposes. The actual certificates will be much larger.

```
<?xml version="1.0" encoding="UTF-8"?>
<md:EntityDescriptor entityID="test.ibi.com"
xmlns:md="urn:oasis:names:tc:SAML:2.0:metadata">
<md:SPSSODescriptor AuthnRequestsSigned="true"
WantAssertionsSigned="false"
protocolSupportEnumeration="urn:oasis:names:tc:SAML:2.0:protocol">>
        <md:Extensions>
            <idpdisco:DiscoveryResponse
xmlns:idpdisco="urn:oasis:names:tc:SAML:profiles:SSO:idp-discovery-
protocol" Binding="urn:oasis:names:tc:SAML:profiles:SSO:idp-discovery-
protocol" Location="http://localhost:8080/spring-security-saml/login/
auth/alias/localhost?disco=true"/>
        </md:Extensions>
        <md:KeyDescriptor use="signing">
            <ds:KeyInfo xmlns:ds="http://www.w3.org/2000/09/xmldsig#">
                <ds:X509Data>
                    <ds:X509Certificate>
MIIDoTCCAomgAwIBAgIEf6nJDTANBgkqhkiG9w0BAQsFADCBgDELMAkGA1UEBhMCVVMxETAPB
qNV
Ykym9t0G+m21eC5LgRX+gyfB+XE70P24N/
ccKYuJkcOdJKnJCFxqdC3x145EfaEFh5bO0UOZzzSM
cyNApOW+qssSOxRJyWbqAEOx3SxE
</ds:X509Certificate>
                </ds:X509Data>
            </ds:KeyInfo>
        </md:KeyDescriptor>
        <md:KeyDescriptor use="encryption">
            <ds:KeyInfo xmlns:ds="http://www.w3.org/2000/09/xmldsig#">
                <ds:X509Data>
                    <ds:X509Certificate>
MIIDpzCCAo
+qAwIBAqIEIuaEqzANBqkqhkiG9w0BAOsFADCBqzELMAkGA1UEBhMCVVMxETAPBqNV
0MaUTCLU1X94XcQJQ8zskBLSSw2jrf9rvGzBMHJrTphJGl0RluIpJWu0fWFhNRRxq61FwZzRl
53i
5pHGZ2yxcPWefW05qqjX/ZZWkx8rxH/YnTvA
         </ds:X509Certificate>
                </ds:X509Data>
            </ds:KeyInfo>
        </md:KeyDescriptor>
        <md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:</pre>
2.0:bindings:HTTP-POST" Location="http://iwserv153.ibi.com:8080/ogc/saml/
SingleLogout/alias/test.ibi.com"/>
        <md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:</pre>
2.0:bindings:HTTP-Redirect" Location="http://iwserv153.ibi.com:8080/ogc/
saml/SingleLogout/alias/test.ibi.com"/>
        <md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:</pre>
2.0:bindings:SOAP" Location="http://iwserv153.ibi.com:8080/ogc/saml/
logout/SingleLogout/test.ibi.com"/>
        <md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-
format:emailAddress</md:NameIDFormat>
        <md:NameIDFormat>urn:oasis:names:tc:SAML:2.0:nameid-
format:transient</md:NameIDFormat>
```

2. Navigate to the following directory:

\omnigen\omnigendata\sso

3. Open the wso2sign.crt file.

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

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

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

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

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

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

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

There are three SingleLogoutService tags and two AssertionConsumerService tags.

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

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

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

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

8. In these same URL strings, change the five host name instances (for example, *iwserv153.ibi.com*) to your actual OGC host name that is being used.

saml/SSO/alias/test.ibi.com" index="1" isDefault="false"/>

9. Save the *ogc-sp.xml* file and give it to the Identity Provider (IdP) administrator.

Configuring the SAML2 Identity Provider (SiteMinder)

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

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

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

\omnigen\OmniGenData\sso

- 2. Edit the sso.properties file, which is located in the same directory.
- 3. Change line (i) as tagged in *Editing the sso.properties File* on page 125, defining *metadata.providers.idp* to the exact, fully qualified file name of the *idp.xml* file that the SiteMinder IdP administrator has provided to you.

For example:

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

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

active=true

5. Save the sso.properties file.

Special Algorithms (Optional)

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

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

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

local_policy_orig_jar.out

b. Rename the original US_export_policy.jar file to:

US_export_policy_orig_jar.out

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

\jre\lib\security

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

C:\Prog	gram Files\Java\jdk1.7.0_80\jre\lib\security			
^	Name	Date modified	Туре	Size
	blacklist	3/17/2016 10:43 A	File	4 KB
	acerts	8/9/2016 2:22 PM	File	98 KB
	java.policy	3/17/2016 10:43 A	POLICY File	3 KB
	java.security	3/17/2016 10:43 A	SECURITY File	18 KB
	javafx.policy	3/17/2016 10:43 A	POLICY File	1 KB
	javaws.policy	3/17/2016 10:43 A	POLICY File	1 KB
	🔬 local_policy.jar	5/31/2011 2:33 PM	Executable Jar File	3 KB
	local_policy_orig_jar.out	3/17/2016 10:43 A	OUT File	3 KB
	trusted.libraries	3/17/2016 10:43 A	LIBRARIES File	0 KB
	US_export_policy.jar	5/31/2011 2:33 PM	Executable Jar File	3 KB
	US_export_policy_orig_jar.out	3/17/2016 10:43 A	OUT File	3 KB
	wso2carbon.pem	8/9/2016 2:22 PM	PEM File	1 KB

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



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



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

Restarting Apache Tomcat

To restart Apache Tomcat:

1. Delete or save the log files in the following directory:

\omnigen\OmniGovConsole\logs

2. Delete the following \mbox{work} subfolder and all of its contents:

\omnigen\OmniGovConsole\Work

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

Testing the New SAML2 SSO Sign On Page

To test the new SAML2 SSO sign on page:

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

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

2. Log in with your SSO credentials.



Using MData, Synch, and WSO2 Administration

This appendix describes the WSO2/MData Synchronization (Mdata-Synch) feature of reducing the configuration work of the administrator when a new subject arrives into the Omni-Gen Server (OGS) model and database, and when data structures are altered (for example, a type or name of a column has been changed). The whole synchronization process has been reduced to double-clicking on the OGC Administration Panel while allowing you to do some basic customization to the synchronization process.

Previously, all users had to go through a set of manual steps in the OGC Administration Panel and in several WSO2 IS Administration panels to make the OGC application consistent with the change(s) made to the data structure.

In this appendix:

- Functional Overview
- Using the WSO2/MData-Synchronization Feature

Functional Overview

MData-Synch consists of the following parts:

- Interaction with OmniDomain to synchronize the internal data structure (referred to as MData) of OGC.
- □ Interaction with WSO2 to synchronize permissive mechanisms of the OGC application.

Using the WSO2/MData-Synchronization Feature

This section describes the prerequisites and synchronization usage of the WSO2/MData feature.

Configuring Omni Server Mode

This section describes how configure the Omni Server Mode setting in the Omni Gen Server (OGS).

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

mniConsole	Cor	nfiguration: Runtime			۵
o: Services	Runtime	Data Quality Runtime Server Remediation	n Command Line		
Configuration -	Runtime	l.			
Runtime		Setting	Value	Description	
Databases		Omni Server Mode	DEVELOPMENT	Used to determine if the system is in production or not. 'DEVELOPMENT' is the default. 'PRODUCTION' is the alternative	
Managed Services Dankumpat		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 the OGS is unresponsive (for example, it is not started or in error), the Sync functionality is disabled.

Using the Synchronization

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

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

Analysis for the sync (and optional customization)

Actual synchronization using the results of the analysis

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

Step 1: Initializing the Analysis for the Synchronization Process.

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

$\leftarrow \rightarrow \mathbf{C}$ (i) localhost:8098	8/ogc/source/list			۲	🗠 🕐 🔤		0	G
360 Viewer Remediation	on Data Quality Monitor	Data Dictionary	Workbench	Grouping	Administra	ation	er an di	inter and
Sources Views Option	ons Tables Table Order	Settings Excer	otions					
E Sources List							0 ⊦	lelp
Name	Uri				Action			
	http://www.1000.1.4.0000/0-ms/D							
IIMCSource	nttp://vm40834-1:8082/OmniD	omain/v2/data.svc/		L L	Sync	e History		

Step 2: Analyzing the Progress.

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

Sources	Views	Options	Tables	Table Order	Settings	Exceptions				
E Source	s List									Help
Synchroni	Synchronization status: Searching for Columns to edit customercomm_chanMaster									
Name		Uri						Action		
IIMCSource	e	http:	//vm40834	-1:8082/OmniDo	main/v2/dat	a.svc/		Sync O	Validate Hist	tory

Step 3: Summarizing the Analysis.

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

Remediation Workbench	Administration	super_a (Data	Supervisor, group.one, Sy:	stem Administrator)	Logout ⑦) ==
Sources Views Option	ns Tables Table Order	Settings Exception	15			
E Sources List + New S	Source				🛛 Help	
Scan completed. Updates to	take effect found					
4 subject table(s) to be dropp 4 subject table(s) to be edited	d found					
72 column(s) to be added for 72 column(s) to be dropped f	lound					
17 subject table(s) to be add Role(4) to be assigned to use	ed found ers found Details &Edit					
Domain(s) to be added to the	e policy(-les) found Details @Ec	dit				
Apply Changes Cancel						
View Details ~						

Step 4: Viewing the Details of the Analysis.

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

Note: *View Details* refers only to the action modifying the OGC MData structure. To view the details for WSO2 modification, click the *Details* link near 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 a sample entry after clicking *Details* from *Role(s)* to be assigned to users found.

Remediation Workbench Administration	super_a (Data Supervisor, group.one, System Administrator) Logout 🤅
Sources Views Options Tables Table Order Settings	Exceptions
E Sources List + New Source	• Нер
Scan completed. Updates to take effect found 4 subject table(s) to be dropped found 4 subject table(s) to be dropped found 18 column(s) to be added found 72 column(s) to be dropped found 17 subject table(s) to be added found Role(s) to be assigned to users found Role(s) to be assigne	
domain. CustomerAddress, domain. CustomerAddressMaster, domain. CustomerAddresslevel3, domain. CustomerAddresslevel3Haster, domain. CustomerAddresslevel3level4, domain. CustomerAddresslevel3level4Master, domain. CustomerAddresslevel3level4Waster, domain. CustomerAddresslevel3level4Master, domain. SourceCodeMap domain. SourceCodeRelation, domain. SourceCodeSet, domain. SourceCodeRelation, domain. SourceCodeSet,	r, son, ,
ta domain.SourceCodeStandard WtCase	Column Column Action c edited

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

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

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

Updating domain roles for users	٥
List of Domains domain Customer × gomain Customer/Address × gomain Customer/Addressivel3evel domain Customer/Addressivel3evel gomain Customer/Addressivel3evel gomain Customer/Addressivel3evel domain Customer/Addressivel3evel gomain Customer/Addressivel3evel gomain Customer/Addressivel3evel domain SourceCode gomain Person × gomain SourceCode × gomain SourceCode ×	ssMaster x domain CustomerAddresslevel3 x domain CustomerAddresslevel3Master x 4Master x domain CustomerMaster x domain CustomerPhone x domain CustomerPhoneMaster x aan SourceCodeMap x domain SourceCodeRelation x domain SourceCodeSet x
Domains	Users
domain.Customer	ds_a × ds_b × super_a × super_b ×
domain.CustomerAddress	[ds_a ×] [super_a ×] [super_b ×]
domain.CustomerAddressMaster	ds_a × [ds_b ×] super_a ×] super_b ×]
domain.CustomerAddresslevet3	ds_a × ds_b × super_a × super_b ×
domain.CustomerAddresslevel3Master	ds_a × ds_b × super_a × super_b ×
domain.CustomerAddresslevet3levet4	ds_a × ds_b × super_a × super_b ×
domain.CustomerAddresslevel3level4Master	ds_a × ds_b × super_a × super_b ×
Save	

Step 6: Customizing Policies to be Updated (Optional

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

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

Updating policies					8
New Domains to add					
Customer × CustomerAddress × CustomerAddressMaster × C	CustomerAddresslevel3 ×	CustomerAddresslevel	3Master × CustomerAd	dresslevel3level4 ×	
CustomerAddresslevel3/evel4/Master × CustomerMaster × CustomerMaster ×	merPhone × OustomerPho	oneMaster × Persor	PersonMaster ×	SourceCode × S	lourceCodeMap ×
SourceCodeRelation × SourceCodeSet × SourceCodeStandard	×				
New Domains to add	Domain roles				1
Customer	Data_Steward ×	Data_Supervisor ×	System_Administrator >	User ×	-
CustomerAddress	Data_Steward ×	Data_Supervisor ×	System_Administrator >	User ×	•
CustomerAddressMaster	Data_Steward ×	Data_Supervisor ×	System_Administrator >	User ×	•
CustomerAddresslevel3	Data_Steward ×	Data_Supervisor ×	System_Administrator >	User ×	•
CustomerAddresslevel3Master	Data_Steward ×	Data_Supervisor ×	System_Administrator >	User ×	*
CustomerAddresslevel3level4	Data_Steward ×	Data_Supervisor ×	System_Administrator >	User ×	· ·
CustomerAddresslevel3level4Master	Data_Steward ×	Data_Supervisor ×	System_Administrator >	User ×	· · · · · · · · · · · · · · · · · · ·
Save Cancel					

Step 7: Executing the Synchronization

To start the actual synchronization process, click Apply Changes.

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

Remediation	Workbench	Administration	super	_a (Data Superviso	r, group.one, System Administra	ator) Logout	0 -
Sources	Views Option	is Tables Table	Order Settings	Exceptions			
E Source	s List 🕂 New S	Source					• Help
Sca <mark>n com 4 subject 1 18 column 72 column 17 subject Role(s) to Domain(s)</mark>	pleted. Updates to able(s) to be dropp able(s) to be edited (s) to be added for (s) to be dropped f table(s) to be added be assigned to use to be added to the	take effect found ed found if found ind ound ed found ed found rs found Details JEdi policy(-les) found Det	t ails #Edit				
Loading C Apply Char View Deta	nges Cancel	L ₂					

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 R	emediation Data	Quality Monitor	Workbench	Administration	super_a (Data Supervisor, grou	up.one, System Admin
Sources Views	Options Table:	Table Order	Settings E	xceptions		
E Sources List		ß				Help
Successfully update tables removed 4, s	d source IIMCSource ource config Items ed	added 18, remove ited 0	ed 72 and edited	0 columns in existing	tables; tables added 17, tables e	dited 4,
Name	Uri				Action	
IIMCSource	http://ww040	CO				

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

Developer Environment Considerations

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

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

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

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

where:

ibi-certs

Is the name of the key storage.

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

3 Run/Debug Configuration	6				
+ - 🗊 🛠 † »	Name:	Grails:opmc-app	-ogc	Share	Single instance only
🔻 🔘 Grails	Graile	Code Courses	Mana Satiana		
Grails:opmc-ap	Craits	Code Coverage	maven settings		
▶ 🖗 Defaults	Modul	e	Cal opmc-app-ogc		
	Comm	and line:	run-app - Djavax.net.ssl.trustStore= C:Uava\OMNIGEN\certificates\ibi-certs - Djavax.net.ssl.trustStorePassword= change	it -Dhttps.protoc	ols=TLSv1.1,TLSv1.2
	⊻Мор	tions:			E
	Enviror	nment variables:			
		ddclassgath: C:\	Users\okhokhgrails\ivy-cache\org.springframework.security\spring		
	0.4	unch browser			
	• Before	launch			
	+ -	/ T +			
			0	Cancel	Apply Help

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

.. \[OGS_HOME_DIR] \omnigen \OmniGenData

Ensure that the following files are copied:

- ibi-certs
- omnigenstore
- omnigenstore.pem

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

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

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




Configuring Omni Governance Console Roles From LDAP (Active Directory)

This appendix describes how to configure a WSO2 based LDAP connection and User Store which will eliminate the redundant data entry, and allow the Subject per Userid Authorizations to be obtained from the enterprise LDAP Server (Active Directory).

In this appendix:

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

Overview

In prior versions, Omni-Gen/Omni-Governance Console supported username authentication and authorization using WSO2_is. The WSO2 repository consisted of a local repository of users and permissions, and groups of users stored in LDAP servers (for example, MS Active Directory). Until now, only user names and authentication requests/responses were obtained by OGC over an LDAP connection. User names which belonged to groups in the enterprise AD, and made available to the Identity Server of OGC, WSO2_IS, each had to be manually re-authorized in WSO2_IS using the WSO2_IS Administration console.

The following sections detail how to configure a WSO2 based LDAP connection and User Store, which eliminates the redundant data entry, and allows the Subject per UserID Authorizations to be obtained from your enterprise LDAP Server (Active Directory).

Prerequisites

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

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

Enabling Authorization Permission From OGC Using Group Names Through LDAP

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

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

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

https://your-wso2hostname:9443

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

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

÷	C A Not secure bttp	𝔅://iwmdm1:9443/carbon/admin/index.js	æ			
(WSO2 Identity Server	State S				
3	Home					
	Identity	WSO2 Identity Server Ho	me			
Main	🔛 Users and Roles 📀 Add	Welcome to the WSO2 Identity Server	Welcome to the WBO2 Identity Server Management Console			
	List	Server				
2	😪 User Stores	Host	localheit			
110121	🔿 Add	Server URL	local.#services/			
	🛃 Claims	Server Start Time	2017-09-22 09:05:06			
in R.	O Add	System Up Time	3 day(s) 3 hr(s) 30 min(s) 42 sec(s)			
	List	Version	530			
	Service Providers Add	Repository Location	file:(C:lwso2_is/bin//repository/deployment/server/			

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

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

WSON Monthly Survey			Management Console
			Signed-in as: primary/edmint@carbon.super Sign-out Docs About
Homo Identity A Z Users and Boles	Home > Identity > User Stores > Add Add New User Store		🕑 Haip
2 O Add	User Store Manager		
User Stores	User Store Manager Class	org woo2 carbon user sore idap Readmin	IBILDAPUsorStroManager •
Eist B Gains	Domain Name*		
Court of the Court	Description		
Ared General Content General Content Second Content Second Content General Content General Content General Content General Content	Property Name Connotine URL* Connection Name* Connection Password*	Property Value dag: // uid=_ou=	Description Convector (RL for the sees store Convector (RL for the sees store Convector (RL for the sees store Convector (RL for the set)) Convector (RL for the set) Convector (RL for the set)) Conv
Parident Entitlement	User Search Based * User Entry Object Class * Username Attribute * User Search Filter *	ou=Users,dc=wso2,dc=org veso2Person vid /8/objectClase=serson)/sid=?/)	ON of the context under which user notices are strong in LDAP Oppad Cases used to combine a service of the combine of the context of the complexity of the context of the context of the complexity of the context of the cont
Policy View Policy View Extension Constant Search	User List Filler*	(objectClass=person)	O Planns oneois to holog with every extreme in LDR P
Manage 🔗 🖓 Workflow Engagements	(Add Cancel)		

5. Complete the fields in the Property Value section.

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

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

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

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

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

OGCUSERS/corporate_userid

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

Parameter	Value
Connection URL*	ldap://iwadc-vm.iwaydev.ibi.com: 389
Connection Name*	CN=Administrator,CN=Users,DC=iway dev,DC=ibi,DC=com
Connection Password*	(Enter this last!)

Parameter	Value
User Search Base*	CN=Users,DC=iwaydev,DC=ibi,DC=com
Username Attribute*	sAMAccountName
User Search Filter*	(&(objectClass=user) (sAMAccountName=?))
User List Filter*	(&(objectClass=user) (memberOf=CN=OGCUSERS,CN=Users,DC =iwaydev,DC=ibi,DC=com))

Note: An asterisk denotes a required field.

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

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

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

 Advanced 		
Property Name	Property Value	
Enable SCIM		
Password Hashing Algorithm	PLAIN_TEXT	
Multiple Attribute Separator	i.	
Maximum User List Length	100	
Maximum Role List Length	100	
Enable User Role Cache	2	
Enable LDAP Connection Pooling		
LDAP Connection Timeout	5000	
LDAP Read Time out	5000	
Retry Attempts	0	
Count Implementation		
LDAP binary attributes		

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

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

15. Click Users.

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

Using the Active Directory (LDAP Server) System

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

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

For example:

- Username: Administrator
- □ Password: (LDAP authorized Password)
- 2. Click Start, select Administrative Tools, and then click Active Directory Users and Computers.
- 3. Identify the corporate or privileged UserName and proceed to *Create Groups in Active Directory*.

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

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

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

🔏 Creat	e in: iwaydev	ibi.com/Users.		
First name:	Larry		Initials:	
Last name: Supera			-91	
Full name:	Larry Sup	era		
Usei logon name	6			
lsupera1		@iwaydev	.ibi com	-
Usei logon name	(pre-Windows)	2000 :		
IWAYDEV1		Isupera1		

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

Procedure: How to Create Groups in Active Directory

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

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

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

🥵 Create in: iwayi	dev.ibi.com/Users
DGCUSERS	
•	
Proup name (pre-Windows 20 Docusers	100):
OGCOGENS	
Group scope	Group type
C Domain local	Security
Call	C Distribution
(• Global	
C Universal	
C Universal	

- 5. Click OK.
- 6. Repeat steps 1 5 for each of the following group names:
 - Data_Supervisor
 - Data_Steward
 - User
 - System_Administrator
- 7. If your OmniGen Model includes the Customer subject, repeat steps 1 5 for each of the following group names:
 - domain.Customer
 - domain.CustomerMaster
- 8. Repeat the two domain.group creations for each Mastered subject in your OmniGen Model.

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

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

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

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

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

w Object - Group	K
🙀 Create in: iway	dev.ibi.com/Users
Group name:	
group.OGCOrg1	
-	
Group name (pre-windows 20	
group.OGCOrg1	
Group scope	Group type
C Domain local	Gecurity
Global	C Distribution
C Universal	
	OK Cancel

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

To designate a user:

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

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

NIUSERS Properties	? ×
lect Users, Contacts, Computers, Service Accounts	, or Groups 🔗 📍
elact this object type:	
Users, Service Accounts, Groups, or Other objects	Object Types
rom this location:	
waydev.ibi.com	Locations
nier the object names to select (<u>examples</u>):	
Larıy Supera (Isuperat @iwaydev ibi.com)	Check Name:
Advanced	OK Cancel
DK Cancel Apply	Hep

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

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

elect Groups	?
Select this object type:	
Groups or Buit-in security principals	Object Types
From this location:	
iwaydev ibi.com	Locations
Enter the object names to select (examples):	
Data_Supervisor,System_Admini;domain:Customer;domain:CustomerM aster[Check Names
Advanced OK	Cancel

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

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

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

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

a. Designate only *one* Data_Supervisor (a user who is a member of the Data_Supervisor group) a member of group.OGCOrg1.

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

Testing Logons to Omni Governance Console (OGC)

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

Procedure: How to Test Logons to OGC

To test your logon of OGC:

1. Connect to OGC by entering the following into your browser:

http://yourhostname:9090/ogc

- 2. Perform the following test 1.
 - a. Enter your username and password credentials. For example:

Username: UserSuperv1

Password: PassSuperv123

- b. Verify that the 360 Viewer, Remediation, and Administration consoles are shown.
- c. Verify that the 360 Viewer shows the Customer Master records.
- 3. Perform the following test 2.
 - a. Enter your username and password credentials. For example:

Username: UserSuperv1

Password: PassSuperv123

- b. Verify that the 360 Viewer and Remediation consoles are shown, but not the Administration console.
- c. Verify that the 360 Viewer shows the Customer Master records.



Custom Logos (Application Branding)

This section describes how to apply branding or custom logos to your Omni Governance Console (OGC) application.

In this appendix:

- Rebranding Omni Governance Console Images With Custom Logos
- Image Reference Catalog
- Available Branding Locations
- Understanding the Placement of Branding Assets

Rebranding Omni Governance Console Images With Custom Logos

To rebrand Omni Governance Console (OGC) images with custom logos:

- 1. Prepare your custom logo image(s) as .png files with transparent backgrounds and image resolutions, as defined in *Image Reference Catalog* on page 158.
- 2. Log out of your current OGC session.
- 3. Ensure that the OGC Tomcat service is stopped in the Omni Console, as shown in the following image.



- 4. Use the File Explorer on your system and the information in *Image Reference Catalog* on page 158 to navigate to the image you want to replace.
- 5. Rename the image file you want to replace by adding the _orig suffix to its file name.

For example, rename logo_login.png as logo_login_orig.png.

6. Copy your custom logo image file, which must be named according to the corresponding value in the File Name column, in *Image Reference Catalog* on page 158.

For example, copy

<your_custom_image_source>\logo_login.png

to

...\images\logos\login\logo_login.png

- 7. Start the OGC Tomcat service in the Omni Console.
- 8. Log in to OGC and view the new custom logo images.

Image Reference Catalog

The following table provides a reference catalog for all of the image locations that can be rebranded. Corresponding screenshots showing the image assets are also provided for reference purposes following this table.

Image	File Name	Path	Resolution	Color Depth	Description
0	logo_about.png	\images \logos \about_dialog	280x40	32	About dialog logo
1	logo_login.png	\images \logos\login	280x40	32	Login page main logo
2	logo_login_info. png	\images \logos\login	177x49	32	Login page bottom logo
3	logo_360viewer .png	…∖images ∖logos ∖360viewer	295x39	32	360Viewer logo
4	branding_bg_str ipes.png	…∖images ∖logos ∖360viewer	1x100	24	360Viewer header background
5	remediation- strip.png	\images \logos \remediation	1x100	24	Remediation logo
6	logo_remediatio n.png	\images \logos \remediation	305x39	32	Remediation header background

Image	File Name	Path	Resolution	Color Depth	Description
7	op.ico	\images \logos	48x48	32	Website icon (tab icon in browser)

Image 0 (logo_about.png)

About OmniGen Govern	nance Console		8
	° 🥠n	nni-Gen	*
	Gover	mance Console	
Product Version:	3.8.4-SNAPSHOT	Build: 2019-03-22 14:15	
Source: OGC Source			
- Builds:			
Domain Codebase Ve	. 3.8.4-SNAPSHOT	Build: 2019-03-22T18:01:56Z	
Domain Server Version	: 3.8.4-SNAPSHOT	Build: 2019-03-22T18:01:56Z	
RemediationService V.	3.8.4-SNAPSHOT	Build: 2019-03-22 18:08	
OmniDomain Version:	3.8.4-SNAPSHOT	Build: 2019-03-22 18:08	
Workbench Service V	. 3.8.4-SNAPSHOT	Build: 2019-03-22 18:08	
- Databases:			
Workflow Model Versi	. 1.3.0.0.000	URL: jdbc:sqlserver://omniserv15:1433;authentication=Not	
OmniGenSource Vers.	. Not available	URL: jdbc:sqlserver://omniserv15:1433;authentication=Not	*
		Close	

	mni-Gen for Customer
	Course Coursels
	Governance Console
Username:	
Password:	
	Sign In
	2 Inførmation Builders

Image 1 (logo_login.png) and Image 2 (logo_login_info.png)

Image 3 (logo_360viewer.png) and Image 4 (branding_bg_stripes.png)



Image 5 (remediation-strip.png) and Image 6 (logo_remediation.png)

🍏 OmniConsole	🗙 阙 Dashboard	× +		
← → C ① Not	ecure omniserv4.ibi.com:9501/ogc/das	shboard/home		
360 Viewer Remediation	Workbench Grouping Administration			
Remediation 5	Home Issues Administration			6
Dashboard				
Activity Stream			-	Activity Today
	≪ ◀ 1 2 3 4	4 5 6 7 8 9 10 359	××	No activity found to
# CBF4085D-A314-4D45-A6CE	0018FDA52A89 ResolveDirect by PRIMARY/super_a on	n 2019-03-26 06:49:44:533 PM		
Open → Resolved				
Reason Description Address in	valid			
# CRE4005D 4244 4D45 4000		- 0040 00 08 08 48-50-500 DM		

Image 7 (op.ico)



Available Branding Locations

Omni Governance Console (OGC) has screen spaces on several pages where image files are rendered. A collection of these images are stored as a theme in a set of subfolders.

By default, this JNDI location of the set of replaceable images is defined in the *context.xml* file, which is located in the following directory of your OGC installation:

\omnigen\omniGenData\OmniGovConsole\data\conf\context.xml

The context.xml file contains the following entry:

```
<!-- Omni Branding -->
<Environment override="true"
value="C:/omnigen/OmniGenData/OmniGovConsole/data/ogc_theme/"
type="java.lang.String"
name="brandingFolderPath"/>
```

The brandingFolderPath points to a set of folders, one folder per page on which there are locations for customizable logos.

If no branding changes are made, then the default OGC theme stored in the above default location is rendered.

Understanding the Placement of Branding Assets

The names of the *ogc_theme* subfolders and the names of the image files are predefined, as per the *Path* values specified in the table in *Image Reference Catalog* on page 158.

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Omni Governance Console Administration User's Guide

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