

iWay

Omni-HealthData[™] Governance Console User's Guide

/ersion 3.1

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This manual describes how to use Omni-HealthData Governance Console (OHDGC) and its core components (360 Viewer and Remediation). This manual is intended for Omni-HealthData administrators and data stewards.

How This Manual Is Organized

This manual includes the following chapters:

	Chapter/Appendix	Contents
1	Introducing Omni-HealthData 360 Viewer	Provides an overview of Omni-HealthData 360 Viewer.
2	Understanding the Console Layout and User Interface	Describes the menus and options that are found in the user interface and layout of Omni-HealthData Governance Console (OHDGC).
3	Available Pages in Omni- HealthData 360 Viewer	Describes the available pages in Omni-HealthData 360 Viewer.
4	Using Omni-HealthData Remediation	Introduces and provides an overview for Omni- HealthData Remediation.
A	Using the Admin Console	Describes how to use the Admin Console to configure administrative properties and functions that are reflected in Omni-HealthData 360 Viewer.

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.

Convention	Description
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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Help Us to Serve You Better

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

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

Platform	
Operating System	
OS Version	
JVM Vendor	
JVM Version	

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

Request/Question	Error/Problem Details or Information
Did the problem arise through a service or event?	
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.	

Request/Question	Error/Problem Details or Information
Describe the steps to reproduce the problem.	
Specify the error messages.	
Any change in the application environment: software configuration, EIS/database configuration, application, and so forth?	
Under what circumstance does the problem <i>not</i> occur?	

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

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

User Feedback

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Thank you, in advance, for your comments.

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Introducing Omni-HealthData 360 Viewer

This chapter provides an overview of Omni-HealthData 360 Viewer and describes the general layout of the interface.

In this chapter:

- Omni-HealthData 360 Viewer Overview
- Key Features and Functionality

Omni-HealthData 360 Viewer Overview

Omni-HealthData 360 Viewer is a core component of Omni-HealthData Governance Console (OHDGC). This component provides a browser-based comprehensive view of the golden records that are mastered across Omni domains (for example, Patient, Provider, Employee, and Facility).

Omni-HealthData 360 Viewer is available only after logging on to OHDGC. All users must sign-in and first be authenticated, and then authorized to view specific data domains managed by the WSO2 Identity Server (WSO2 IS), which is a component of OHDGC. The WSO2 IS manages the assignment of access roles and privileges that allow or prohibit access to and viewing of data in the OHDGC web applications.

Key Features and Functionality

The main operations that can be performed by Omni-HealthData 360 Viewer include:

- Uiewing a list of golden records across domains.
- Conducting advanced searches among golden and instance records.
- Uiewing details of golden records across domains.
- Uiewing and comparing golden records and supporting instance records.
- Uiewing subdomain records related to the golden record.
- Comparing instance records with the source record.
- Uiewing the history of a golden record.

□ Comparing current golden records with earlier versions.



Understanding the Console Layout and User Interface

This chapter describes the menus and options that are found in the user interface and layout of Omni-HealthData Governance Console (OHDGC).

In this chapter:

- Navigating the General Page Layout
- Navigating the Table Layout

Navigating the General Page Layout

All pages in Omni-HealthData Governance Console (OHDGC) applications use a common layout, as shown in the following image.

360 Viewer	Remediation Ada	ministration	the state in the state	and a star and a star of the	to a sub a seconder	and the second second	an an an an an an an an a	super_a	(Data Supervisor, gro	up.one, System Admini	istrator) Logo	put (?) -
🛞 360 View	er Patient	Master 🔹 🛛 Advar										
Home Search resul	ts PatientMaster +	First Name: mark										
PatientMaster (2											L	inking
Showing 1-2 of 2 reco	ords. Number of records	s per page 20 🔹									-44	4 1 1 1
Master Id 0	Full Name 0	Last Name 🌼	First Name 6	Biological Sex 0	Date Of Birth 0	Address 0	City 0	State 0	Postal Code 0	Omni Modified 0	Issues	Actions
					(
▶ 24	Mark Stephenson	Stephenson	Mark		01/01/1990	address_line1	city	state_province	postal_code	08/07/2018 06:0		a 🖉
▶ 26	Mark Stephenson	Stephenson	Mark		01/02/1990	address_line1	city	state_province	postal_code	08/07/2018 06:0		0 ×
Showing 1-2 of 2 rect	rds. Number of records	e per page 20 🔹									-44	4 f 1- 10-

Each page contains the following areas:

- 1. Menu bar
- 2. Advanced Search button
- 3. Breadcrumb trail
- 4. Main page body

Using the Menu Bar

The menu bar displays different items depending on whether the user has or has not yet signed in (authenticated).

Prior to signing in, the menu bar displays the following:

Login button.

About button, which is indicated by a question mark icon.





Clicking *About Omni-HealthData*, displays a dialog box that contains Omni-HealthData source and build information, as shown in the following image.

About Omni-HealthData	Governance Consol	e	8
	mni	HealthData	4
	Gove	rnance Console	
Product Version:	3.1.4-SNAPSHOT	Build: 2018-07-29 16:50	
Source: OGCSource			
- Builds:			
Domain Codebase Ve.	3.1.4-SNAPSHOT	Build: 2018-08-03 10:04	
Domain Server Version	: 3.1.4-SNAPSHOT	Build: 2018-08-03 10:04	
RemediationService V.	3.1.4-SNAPSHOT	Build: 2018-07-29 20:39	
Workflow Model Versi	. 1.3.0.0.000	URL: jdbc:sqlserver://iwsql2014-vm2\iwayqa2:1433;authe	
OmniGenSource Vers.	Not available	URL: jdbc:sqlserver://iwsql2014-vm2\iwayqa2:1433;authe	
OmniGen Version:	Not available	URL: jdbc:sqlserver://iwsql2014-vm2\iwayqa2:1433;authe	
omni remediation Ver	. 1.3.0.0.000	URL: jdbc:sqlserver://iwsql2014-vm2\iwayqa2:1433;authe	-
		Clos	e

The About Omni-HealthData dialog box provides the following information:

- Version number
- Build numbers
- Database locations and names

This information is used to verify that the user is working within the proper Omni-HealthData environment and corresponding databases. It is also used for troubleshooting purposes when contacting IBI/iWay Customer Support.

Using the Breadcrumb Trail

Breadcrumbs allow you to keep track of your navigation within Omni-HealthData 360 Viewer, as shown in the following image.



You can click on a breadcrumb item to be redirected to that corresponding page.

Search details are displayed to the right of the breadcrumb trail after performing an Advanced Search, as shown in the following image.



Using the Main Page Body

The page body is the main area of each page where you can view, compare data, and perform searches.

Patient Masters Record Names		Addresses 0	Addresses Contact Methods			erred Providers		
1-3 of 3 records.								
Id ^ M	laster Child Id 🗘	Address Line1 \$	Address Line2	ŧ	City \$	Postal Code \$	Type Code	¢
PersonAddre pa	atient:10:addre	25710 INDUST			HAYWARD	94545-2920	С	
► PersonAddre pa	atient:10:addre	25710 INDUST			HAYWARD	94545-2920	Н	
PersonAddre pa	atient:10:addre	25710 INDUST			HAYWARD	94545-2920	0	

For more information on using the various pages in Omni-HealthData 360 Viewer, see *Available Pages in Omni-HealthData 360 Viewer* on page 21.

Navigating the Table Layout

Omni-HealthData 360 Viewer displays retrieved data within tables. There are several types of tables in Omni-HealthData 360 Viewer, which are all structured, as shown in the following image.

JEMID ^	First Name 💠	Middle Na 🗘	Last Name 💲	Date Of Bi \$	Address \$	City \$	State/Pro \$	Postal Code 🗘	Issues	Actions
• 10	Bridget	В	Mooney						9 4 23	5 ×
12	Giovani	С	Ewing						🥶 🕶 🚜	5 %
• 14	Malcolm	D	Ritter						🔊 🕫 🚜	5 ×
16	Armani	E	Esparza						992	5 ×
18	Anabelle	F	Frey						👽 🕫 👪	5 ×
2	John	David	Jones	02 20 1975	200 Wellnes	Southport	Connecticut	60890	992	5 %
20	Lexie	G	Braun						🕫 🕫 👪	5 ×
22	Warren	н	Gay						🥶 🕫 🚜	5 %
24	Gunnar	1	Riddle						🥶 🐖 🚜	5 ×
26	Ramon	J	Hanev						BB 67 9%	5 %

Each table contains the following areas:

- 1. Navigation bar
- 2. Column headers
- 3. Input fields for filtering
- 4. Record lists

Using the Navigation Bar

The navigation bar provides you with functionality to move to the next, previous, first, and last page. You can also select a specific page number to navigate. The Number of records per page drop-down list specifies how many records to display on one page at once. Available values include 10, 15, 20 (default), 25, or 30.

Although headers are used to display columns names, you can click on a header to sort the data in the table by that column.

Sorting Through Records

Sorting is case-insensitive and can be applied to one column at time. Although headers are used to display columns names, you can click on a header to sort the data in the table by that column. To change the sorting order, click on the column header again. The column by which the sorting is performed is highlighted in green and the arrow indicates ascending or descending order of sorting.

You may also filter the results using dynamic filters below the table columns headers. The results are updated dynamically to show only relevant records while you type in the value (with a slight delay). Filtering can be applied to several columns at once.

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

🦔 360 V	360 Viewer PatientMaster Advanced Search											
Invalid val	Invalid value March entered in Date Of Birth field. Date should be entered in valid format: [MM/dd/yyyy] or date range.											
PatientMaster 1												
Showing 1-11 of	Showing 1-11 of 11 records. Number of records per page 20 •											
Master Id 🜲	Full Name 💠	Last Name 👻	First Name 💠	Biological#	Date Of Bi	Address 🗢 🖨	City 💠					
					March 🛗							
▶ 4	Harry Hamlin	Hamlin	Harry		08/06/2018	261 Lagoo	Portland					
▶ 27	9	9	9		08/06/2018	9	9					
▶ 35	81	81	81		08/06/2018	81	81					

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

Using the Admin Console, you can configure the width, alignment of columns, and the specific columns that can be sorted and filtered. For more information, see *Using the Admin Console* on page 45.

Using the Calendar

The calendar feature allows you to retrieve Omni records by their creation date. You can manually type in a specific date or select a date from the calendar, as shown in the following image.

(Oct	ctober 2013						
Su	Мо	Tu	We	Th	Fr	Sa			
29	30	1	2	3	4	5			
6	7	8	9	10	11	12			
13	14	15	16	17	18	19			
20	21	22	23	24	25	26			
27	28	29	30	31	1	2			
3	4	5	6	7	8	9			

By default, the calendar displays the current date for empty fields or the date specified in the input field for populated fields. To close the calendar without selecting a specific date, click any area outside of the calendar.



Available Pages in Omni-HealthData 360 Viewer

This chapter describes how to use the available pages in Omni-HealthData 360 Viewer.

In this chapter:

- Omni-HealthData Governance Console Login Page
- Home Page (Domain Main Page)
- Performing Advanced Searches for Golden Records
- Search Results Page
- Details 360 Page
- Master Comparison Page
- Master Comparison Page of Historic Records
- Compare Source Page

Omni-HealthData Governance Console Login Page

All users of Omni-HealthData Governance Consoler are required to log in using a valid user name and password to configure and use the application.

The following image shows the login page of Omni-HealthData Governance Console that is displayed.

Login		? –
	Covernance Console	
	Information Builders.	

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

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

Governance Console Unsuccessful login. Please try again.	
Unsuccessful login. Please try again.	
Username:	
Password:	
Sign In	

Once you have logged in, you can log out at any point by clicking the *Logout* button, which is located in the upper-right corner of every page. After you have logged out, you are automatically redirected to the Login page.

Home Page (Domain Main Page)

After logging into Omni-HealthData 360 Viewer, you are automatically redirected to the Home page (Domain main page). You can view a list of records for the current domain in the system. The list of domains and default current domain are metadata driven and can be configured using the Admin Console. For more information, see *Using the Admin Console* on page 45.

By default, only the first 20 records are retrieved from the database and displayed. You can select the number of records that should be displayed per page and navigate to the next pages to additional records. Table columns can be configured using the Admin Console. For more information, see *Using the Admin Console* on page 45.

360 Viewer	Remediatie	on Admini	stration						visor, group.one	e, System Admin		gout ⑦ -
🔊 360 V	iewer	PatientMas	ter 👻 🛛 🗛 🗛	anced Search								
PatientMast	er 11											Linking
Showing 1-11 o	Showing 1-11 of 11 records. Number of records per page 20 •											
Master Id 💠	Full Name 🔅	Last Name 💠	First Name 🔅	Biological#	Date Of Bi	Address \$	City \$	State \$	Postal Code¢	Omni Mo ¢	Issues	Actions
					*					#		
▶ 26	0	0	0		08/06/2018	0	0	0	0	08/06/201	25	3 🌾
▶ 27	9	9	9		08/06/2018	9	9	9	9	08/06/201	25	3 🌾
► 28	18	18	18		08/06/2018	18	18	18	18	08/06/201		* د
▶ 29	27	27	27		08/06/2018	27	27	27	27	08/06/201		• 🎽
► 30	36	36	36		08/06/2018	36	36	36	36	08/06/201		* ک
► 31	45	45	45		08/06/2018	45	45	45	45	08/06/201		* ک
▶ 32	54	54	54		08/06/2018	54	54	54	54	08/06/201		۵ 🌾
► 33	63	63	63		08/06/2018	63	63	63	63	08/06/201		• 🎽
▶ 34	72	72	72		08/06/2018	72	72	72	72	08/06/201		* د
▶ 35	81	81	81		08/06/2018	81	81	81	81	08/06/201		* د
▶ 4	Harry Hamlin	Hamlin	Harry		08/06/2018	261 Lagoo	Portland	OR	54534	08/06/201	V	% ت
Showing 1-11 o	f 11 records. Nur	nber of records p	er page 20 🔹								-44	< 1 ► ₩

You can retrieve a preview of a record. Note that the columns that are displayed can be configured by a system administrator. For more information, see *Using the Admin Console* on page 45.

The Preview panel is displayed when you click anywhere on the record row. The row is highlighted when hovering your mouse pointer to indicate that the specific row can be clicked. The Preview panel is closed when you click the same record a second time or when another row is clicked. As a result, only one preview panel can be opened at a time.

	360 Viewer PatientMaster - Advanced Search -										
	PatientMaster 1										
	Showing 1-11 of 11 records. Number of records per page 20 •										
	Master Id 🗧	Full Name 💠	Last Name 💠	First Name 💠	Biological	Date Of Bi	Address \$	City \$	State \$	Postal Code	
						*					
	▼ 26	0	0	0		08/06/2018	0	0	0	0	
	Omni Cre	ated Date 08/06	6/2018 07:26:29 F	PM Mailin	g Address Line1	0	Interpreter F	Required inter	preterRequiredCo	ode	
	Tax ID	taxld	TypeCode- 0	Mailin	g Address City	0	Language languageCode-				
	E Mail	0		Mailin	g Address State F	Province 0	Deceased				
	Primary P	hone O		Mailin	g Address Postal	Code 0	Date Of Death 08/06/2018				
100000	▶ 27	9	9	9		08/06/2018	9	9	9	9	
10000	▶ 28	18	18	18		08/06/2018	18	18	18	18	

You can switch to another domain using the domain drop-down menu in the search panel. When another domain is selected, the Home page (Domain main page) is reloaded to display the records for the selected domain. The list of available domains that are displayed in the domain drop-down menu can be configured using the Admin Console. For more information, see *Using the Admin Console* on page 45.

You can navigate to the Details 360 page by clicking *Details* 360 or display the Master Comparison page by clicking *Master Comparison* to view golden records and their supporting instance records.

Performing Advanced Searches for Golden Records

If you are required to enter additional parameters to locate records, then you can use the Advanced Search facility for this purpose, which can be accessed by clicking the *Advanced Search* button.

77	360 Viewer PatientMaster Advanced Search	
Se	arch for PatientMastor ProviderMastor ProviderPracticeMaster PracticeFacilityMaster FacilityMaster FacilityLocationMaster OrganizationMaster1 OrganizationalUnitMaster MemberMaster PayerMaster WorkerMaster	0
©	Frequent Master Id Last Name Tax Id	
C	General Search Close - 3	

The Advanced Search page contains the following areas:

- 1. Domain tabs. Allows you to change domain for search.
- 2. Grouped attribute areas. Allows you to enter search parameters.
- 3. Search, Clear, and Close buttons. Allows you to execute searches, clear specified criteria, and close the search overlay without executing the search.

The attributes in the Advanced Search page are grouped into sections that can be configured in the Admin Console. For more information, see *Using the Admin Console* on page 45. This makes it easier for you to find the required attribute. Only one section can be expanded at once. When another section header is clicked, the new section is opened and the previously opened section is closed.

After the Search button is clicked, the search overlay is hidden and the search is executed.

The Clear button deletes all entered criteria, except for the value in the Keyword, which can be only manually deleted.

If you click the Close button, the search overlay is hidden without executing the search or updating the search results. The parameters that you enter are cleared and returned to the state they were in as of the last advanced search that was performed.

When an advanced search is used to refine simple search results, the *Keyword* field is populated with what was entered before in the simple search input field. The final query is combined with the keyword search and any additional attributes.

If you edit the value in the Keyword field and perform an advanced search, the value in the simple search input field is overwritten with the new value.

If you already have results from an advanced search and return to the search overlay to edit the search criteria, the values you entered for your previous query are preserved.

In addition, validation mechanism for numeric fields and fields with date formats work for domain and subdomain pages. When invalid data is entered and you click Search, a message indicating invalid data is displayed and the corresponding field is highlighted in red, as shown in the following image.

Invalid value 'test' entered Invalid value 'test' entered	In 'Gyn Age At First Pregnancy' field. Value must b I in 'Gyn Expected Delivery Date' field. Value must I	ie numeric. be date: [format: MM/dd/yyyy]	
Frequent			
General			
Group1			
Disease Alert Code		Drug Allergies Code	
Education Degree		Education Education	
Education School Name		Education Student Code	
English Fluency Code		Ethnic Group Code	
Family Grouping Identifier		First Name	
Foster Child Code		Full Name	
Gender Code		Gyn Age At First Pregnancy	test
Gyn Age At Menarche		Gyn Age At Menopause	
Gyn Expected Delivery	test	Gyn Expected Delivery	

If you want to perform an advanced search by subdomain, click on the appropriate subdomain link and a search overlay is populated with fields. These fields can be configured in the Admin Console for a specific subdomain. For more information, see *Using the Admin Console* on page 45.

Every subdomain page includes a Return to <*name_of_domain*> button, that allows you to return to the search results by domain, as shown in the following image.

Ceturn to Patient Masters		
ddees line f	Address (Jaco)	
oureas Line i	Page 000 Lange	
ddress Line3	Address Line4	
Ry	Class	
ountry Code	End Date	
la l	Master Child Id	
laster Created Date	 Master Id	
aster Modified Date	Master Status	
aster Status Reason	Omni Created Date	
mni Modified Date	Owning Master Object	
	Туре	
ostal Code	Preference Order	
lart Date	Status	
tatus Reason	Transaction Id	
una Cada	Usaas Comment	

Search Results Page

After an advanced search is performed by the specified criteria, the results in table format along with the search criteria are returned. The Domain drop-down menu indicates the domain used by which the Advanced Search was performed.

360 Viewer	Remediati	on Admini	stration				su	per_a (Da	nta Super	visor, group.on	e, System Admin	nistrator) Lo	gout	0
🔊 360 V	360 Viewer PatientMaster Advanced Search													
Home Search	Home Search results PatientMaster + Last Name: Hamlin													
PatientMast	PatientMaster ()													
Showing 1-1 of	1 records. Numb	per of records per	r page 20 🔹									-	4 4 1	6 H6
Master Id 💠	Full Name 💠	Last Name 💠	First Name 💠	Biological#	Date Of Bi#	Address \$	City	State	÷	Postal Code	Omni Mo ¢	Issues	Ac	tions
					*									
► 4	Harry Hamlin	Hamlin	Harry		08/06/2018	261 Lagoo	Portland	OR		54534	08/06/201	9	٩	. 🗶
Showing 1-1 of	Showing 1-1 of 1 records. Number of records per page 20 🔹													

You can navigate to the Details 360 page by clicking *Details* 360 or display the Master Comparison page by clicking *Master Comparison* to view golden records and their supporting instance records.

If you perform a search using non-existing criteria, the following type of message is displayed in the Search results page.



When using the advanced search functionality, the breadcrumb trail will also contain the search criteria.

Details 360 Page

To view detailed information for a specific record (for example, patient), click the *Details* 360 link for the appropriate record. The Details 360 link is available on the Home and Search results pages.

The data in the Details 360 page is represented by data from the domain record (Patient Masters Record tab) and collections of surrounding data (for example, Names, Addresses, and Identifiers). You can switch between these categories using tabs on the top of the page. For more information, see *Using the Admin Console* on page 45.

The data from the domain record is also divided into several sections (for example, Demographics, Ethnicity, and Language), which can be collapsed and expanded, as shown in the following image.

360 Viewer PatientMaster - Advanced Search -	
Home) Master Id : 26 Name : 0 DOB : 08/06/2018 Tax Id : 0 •	Master Comparison
2] General Issue
PatientMaster Record Multi Race Codes Other Identifiers Other Addresses	Other Names Other Phone Numbers Other Emails Relations
Preferred Providers	
Last Updated:	
Multiple Birth Total	U
• Work	
Occupation	0
Occupation Code	occupationCodeCode
Occupation Code Description	
Employer Name	0
Employer Id	
Retired	retiredCode
Retired Description	
C Education	
Education School Name	0
Education Education Level	educationEducationLevelCode
Education Education Level Description	
Education Degree Completed	0
Education Student Type	educationStudentTypeCode
Education Student Type Description	
⊙ Military	
Military Veteran Status	militaryVeteranStatusCode

By default, all of the sections are expanded. To collapse or expand a section, click on the section name. Sections and their properties can be configured using the Admin Console. For more information, see *Using the Admin Console* on page 45.

The Names tab for a subdomain displays all of the names that existed in the Patient Masters domain. The same mechanism works for other subdomains.

When you click a specific table row, the Preview panel is displayed, which contains more detailed information associated with the record. The view that is displayed in the Preview pane can be configured using the Admin Console. For more information, see *Using the Admin Console* on page 45.

1	360 Viewer PatientMaster + Advanced Search +												
	PatientMaster (1)												
S	Showing 1-11 of 11 records. Number of records per page 20 🔹												
٨	Master Id 💠	Full Name 💠	Last Name 💠	First Name 💠	Biological#	Date Of Bi	Address \$	City \$	State \$	Postal Code¢	Omni Mo ¢	Issues	Actions
						*					*		
•	26	0	0	0		08/06/2018	0	0	0	0	08/06/201	25	* د
	27	9	9	9		08/06/2018	9	9	9	9	08/06/201	25	* د
	Omni Creat	ed Date 08/06	/2018 07:26:29 F	M Mailin	g Address Line1	9	Interpreter F	Required inter	preterRequiredC	ode			
	Tax ID	taxId	TypeCode- 9	Mailin	g Address City	9	Language	lang	uageCode-				
	E Mail	9		Mailin	g Address State I	Province 9	Deceased						
	Primary Pho	one 9		Mailin	g Address Postal	Code 9	Date Of Dea	ath 08/0	6/2018				
Þ	28	18	18	18		08/06/2018	18	18	18	18	08/06/201		• 🎽

You can configure column sizes, alignment of columns, and specify what columns can be sorted and filtered using the Admin Console. For more information, see *Using the Admin Console* on page 45.

There is a drop-down menu in the breadcrumbs trail where you can view information about the supporting instance records, as shown in the following image.

Hon	ne Search results	UEMID # PatientMa	aster:214 👻	
	Patient Masters Re	Source Name	Omni Modified Date	Source Instance Id
Last Updated		Golden Record		
		ALLSCRIPTS		Patient_10
Θ	Demographics	ALLSCRIPTS		Patient_11
	Date Of Birth	ALLSCRIPTS		Patient_12
	Gender	ALLSCRIPTS		Patient_13

Master Comparison Page

Using the Master Comparison page, you can compare instance records with golden records, and other instance records.

To access the Master Comparison page for a golden record, click the Master Comparison link for the appropriate record on the Home page or Search Results page.

				2	
		1-	🗐 General Issue	🛃 Override Matching	G View History
85	Golden Record			<	Show Instances
Record Properties	Version: 2 Master Id: 27 Master Status: A Master Status Code: sourceStatusCodeCode Master Status Code Deorription: Omni Created Date: 0806/2018 07 25:29 PM Omni Modflied Date: 08/06/2018 07 33:49 PM	5			
Work					
Occupation	9				
Occupation Code	occupa	tionCodeCode			
Occupation Code Description					
Employer Name	9				
Employer Id					
Retired	retired	Code			
Retired Description					T`
C Education					
Education School Name	9				
Education Education Level	educat	ionEducationLevelCode			
Education Education Level Description					
Education Degree Completed	9				
Education Student Type	educat	ionStudentTypeCode			
Education Student Type Description					
 Military Provider Preferences 					

The Master Comparison page contains the following areas:

- 1. General Issue button.
- 2. Override Matching button.
- 3. **View History button.** Enabled as of Omni-HealthData version 3.1.4, the View History button allows you to view a list of versions for the golden record.
- 4. Show Instances link. Expands the instance records section.
- 5. Record Properties section.
- 6. Grouped attribute section(s).
- 7. Subdomain(s) section(s).

The Record Properties section includes the version number, record ID, and the last modified date on the top of the page and can be configured using the Admin Console. For more information, see *Using the Admin Console* on page 45.

By default, only golden record data is displayed on the Master Comparison page.

The data is organized into sections that can be configured using the Admin Console. For more information, see *Using the Admin Console* on page 45.

The collection of items, which represent subdomain data, are displayed hierarchically in expandable sections (collapsed by default) and can also be configured using the Admin Console. For more information, see *Using the Admin Console* on page 45.

To view all instance records that correspond to the current golden record selected, click the Show Instances link. This link displays the number of instance records for the golden record. When you click this link, the candidate section is expanded to the right of the golden record.

For easy comparison, the information for the instance records is displayed next to the golden record. Attribute values in each instance record that are different from the attribute values in the golden record are highlighted in pink. The values that are common (standardized) to both records (golden and instance) are highlighted in yellow.

The Record Properties section for instance records displays the Source Name, Source Instance ID, and the last modified date. The properties for this view can be configured using the Admin Console. For more information, see *Using the Admin Console* on page 45.

			💐 General Issue	🔏 Override Matching	😳 View History
- 25	Golden Record	Ø Hide Instances	Instance Records)•)—	
		8	1		Θ
Record Properties Collapse All	Varsion: 2 Master Id: 27 Master Status: A Master Status: Code: sourceStatusCodeCode Master Status: Code Description Ormal Created Date: 08/06/2018 07:23:29 PM Ormal Medified Date: 08/06/2018 07:33:49 PM	Source Name: TestS Source Instance Id Source Status Code Source Status Code Source Created Dat Source Modified Dat	Source 1533583574856-9 :sourceStatusCodeCode Description: o 680602018 te: 080602018		
Tax Id Type	taxIdTypeCode	taxIdTypeCode			
Tax Id Type Description					
Tax Id	9	9			
Omni Created Date	08/06/2018 07:26:29 PM				
Omni Modified Date	08/06/2018 07:33:49 PM				
Demographics Primary Address Meiling Address Family Work					
Occupation	9	9			
Occupation Code	accupationCodeCode	occupationCodeCode			
Occupation Code Descrip	ption				
Employer Name	9	9			
Employer Id		Organization:TestSour	ce:linkToOrganization		
Retired	retiredCode	retiredCode			

Subdomains or Subcollections are essential attributes of a golden record that are not uniquely identified in the record. Subdomains are a many-to-one relationship with the base record. These subdomains could include names, addresses, and contact information (for example, email addresses, phone numbers, and so on). However, one instance record may have two names in a collection, and another instance may have three. The resulting golden record may be a *union* of values across instance records.

Instance records could have a different number of items in their collections and not all items are used to compose the golden record. The items that are used in a golden record are highlighted with a green border. Values of attributes in each instance record that are different from the attribute value in the golden record itself are highlighted in pink. The values that are common (standardized) to both records (golden and instance) are highlighted in yellow.

						🕝 Viev	w History
	Golden R	ecord	Ø Hide Instances	In	stance Re	cords 🚺 🖌	
			()	m			,
				1	Θ	2	\odot
Record Properties	Version: 8 Master Id: 214 Omni Modified Date:		Source Name: AL Omni Modified Da Source Instance I	LSCRIPTS te: d: Patient_10	D	Source Name: ALLSCRIPT: Omni Modified Date: Source Instance Id: Patient	s _11
Demographics							
② Language							
Names							
() Name 1							
General							
Class							
First Name		Emily	Emily			Emily	
End Date							
⊙ 1							
Degree		BA	BA			MBA	
Full Name							
Id		PersonNameMaster.patient.214.nam	PersonName ALLSC	RIPTS:Pers	onNa	PersonName:ALLSCRIPTS:Pe	ersonNa
Last Name		Biers	Biers			Biers	
Master Child Id	i	patient 214:names:D:1	S				
Master Creater	d Date						
Master Id							
Master Modifie	d Date						
Master Status		A	1				

Using the Instance Records Overlay Window

The Instance Records overlay window contains the following areas:

- 1. Advanced Search link. Opens the Advanced Search page.
- 2. List of Instance records. Shows all instances or search results.
- 3. **Done button.** Closes the dialog and displays only the selected instance records on the Master Comparison page.

Select Re	ecords to View	8
	2	1 - Advanced Search
	Index 🔺	ld
	1	Patient:TestSource:1533583574856-9
3		
Done		

When there are many instance records corresponding to the current golden record, you can open the full list of instance records and select some records to be displayed in Comparison mode. You can also search the desired instance record by performing a simple search or leveraging the advanced search by using all of the attributes that are available.

When you click on the title of the instance records section, you receive a list of all instance records corresponding to the current golden record. All the records in the list are selected by default. If the list long, then a scrollbar inside the overlay window is included. For each instance record, the Source Name, Source Instance ID, and the last modified date are displayed. The fields that are displayed can be configured using the Admin Console. For more information, see *Using the Admin Console* on page 45.

Currently displayed records are selected and highlighted. To select or deselect records, select or deselect the appropriate check boxes. When you are finished with your selections, click *Done* to close the overlay window and refresh the Comparison view to show the selected instance records.

Select Re	ecords to View	8
		Advanced Search
	Index .	ld
	1	Patient:TestSource:1533583574856-9
Done		

Performing Simple Searches for Instance Records

You can perform a simple or advanced search to narrow the list of instance records. This search mechanism is similar to the search of golden records. However, there is no validation of minimum alphanumeric characters performed for a simple search. Wildcard searches are also supported. A scope of the search is defined by the currently displayed golden record.

Performing Advanced Searches for Instance Records

To search by different parameters (for example, to find all instance records that have a particular DOB, the same as in the golden record), you can leverage the advanced search. When you click *Advanced Search*, the overlay window is enlarged. You can enter any number of search criteria and then click *Search*.

Sea	arch Instance	Records		8
⊚	Frequent			
⊙	General			
	ld			
	Search	Clear	Back to Instances	1
	2		3	

The Advanced Search page contains the following areas:

- 1. Grouped attribute areas. Used to set search parameters.
- 2. Search and Clear buttons.
- 3. Back to Instances link.

The attributes in the Advanced Search dialog are grouped into sections to make it easier for you to find the necessary attribute. This can be configured using the Admin Console. For more information, see *Using the Admin Console* on page 45. Only one section can be expanded at once. When another section header is clicked, the new section is opened and the previously opened one is closed.

After the Search button is clicked, the list of search results, which consists of matching instance records corresponding to the current golden record, is displayed.

The Clear button deletes all entered criteria, except for the value in the Keyword field. The value in the Keyword field can be only cleared manually.

After the Back to Instances link is clicked, the Advanced Search dialog is closed and the instance records overlay window is displayed.

When an advanced search is used to refine simple search results, the Keyword attribute is populated with the value entered in the Simple Search input field. The final query is combined with the Keyword search and additional attributes.

If you edit the formerly filled in Keyword field and perform an advanced search, the value in the Simple Search input field is overwritten with the new value.

If you already received advanced search results and return to the search overlay to edit search criteria, the values that you entered in your previous query are preserved.

There is a validation mechanism for numeric fields and fields with date format. It works for domain and subdomain pages.

After invalid data is entered and you click *Search*, an appropriate message is displayed and the corresponding field is highlighted in red, as shown in the following image.

Invalid value 'test' entered in Invalid value 'test' entered in	'Gyn Expected Delivery Date' field 'Habit Alcohol Ounces' field. Valu	d. Value must be date e must be numeric.	[format: MM/dd/yyyy]		
Ethnic Group Code			Family Grouping Identifier		
First Name			Foster Child Code		
Full Name			Gender Code		
Gyn Age At First Pregnancy			Gyn Age At Menarche		
Gyn Age At Menopause			Gyn Expected Delivery Date	test	
Gyn Expected Delivery Date Comment			Gyn Expected Delivery Date Entered		m
Gyn Gynecological Note			Gyn Months Spent Breastfeeding		
Habit Alcohol Ounces	test		Habit Alcohol Use Code		
Habit Chew Use Code			Habit Cigar Use Code		
Habit Cigarette Use Code			Habit I V Drug Use Code		
Habit Illicit Drug Use Code			Habit Illicit Frequency		
Habit Pipe Use Code			Habit Smoking Quit Date		m
Habit Smoking Start Date			Habit Snuff Use Code		
Usebb Tabarra Di Das			United Tables of United States		

When you want to perform an advanced search by subdomain, click the appropriate subdomain link and the search overlay is populated with fields. These fields can be configured using the Admin Console for a specific subdomain. For more information, see *Using the Admin Console* on page 45.

Master Comparison Page of Historic Records

For each golden record, a history of versions is also tracked. You can view this list of versions with indications of changes in a specific version. You can also select a version to see all the values of golden records and instance records in that version, and leverage the compare functionality to view differences between opened versions and current/previous versions of the golden record.

When you click View History, the overlay window is displayed, which shows a list of all versions of the golden record. The version number, creation date, and number of instances are displayed for each record, as shown in the following image.

Record History				8
Version	•	Created on 🔹	# of Inst. 🗘	
1		08/06/2018 at	1	

To navigate to the Master Comparison page for any version, click the version number link.

When a version that is not current is selected, a NOT CURRENT label is displayed, as shown in the following image.

Home Master Id : 34 Name : 72 I	DOB : 08/06/2018 Tax Id : 72) v.1 NOT CURRENT	
		Compare 🗸 🗸
	Golden Record	Show Instances
Record Properties Collapse All	Master Id: 34 Master Status: A Master Status Code: sourceStatusCodeCode Master Status Code Description: Omni Created Date: 08/06/2018 07:26:29 PM Omni Modified Date: 08/06/2018 07:26:29 PM	
🕤 General		
Name Prefix	72	
Full Name	72	
First Name	72	
Last Name	72	
Middle Name	72	
Name Suffix	72	
Primary Phone	72	
Mobile Phone	72	
E Mail		

You can return to the current version using the breadcrumb trail to the left of the page title.

The structure of this page is similar to the current version of a golden record and can be configured in the same view using the Admin Console. For more information, see *Using the Admin Console* on page 45.

The only functionality that is accessible for non-current versions of a golden record is the Compare option, as shown in the following image.

	Compare	1
Compare w	rith Current	
Compare w	ith Previous	
Compare w	ith Version	
Clear Com	parison	

There are several values that you can select for the Compare option.

- **Compare with current.** The differences between the selected version and the current version are highlighted.
- □ **Compare with previous.** The differences between the selected version and the previous version (version N-1 where N selected version) are highlighted.
- Select version. A model is displayed where you can select the version you want to compare against.
- **Clear Comparison.** Clears comparison highlighting.

To select a value for the Compare option, click on the down arrow next to the Compare button and select the value from the drop-down list. As a result, highlighted in blue are the golden record attributes that are different from the version you compared against. By hovering over the value, you can see the appropriate value in the compared version.

			Compare with Version 1		
	Golden Record	Ø Hide Instances	Instance Records 🛐 🕶		
			1 ©		
acord Properties Version: 7 Master Id: 214 Omni Modified Date:		Source Name: ALLSCRIPTS Omni Modified Date: Source Instance Id: Patient_10			
O Demographics					
Date Of Birth 1977-07-22T00:00:00		1977-07-22T00:00:00			
Gender	Female	Female			
Gender Code	F	F			
Mothers Maiden Name	Crown	Crown			
Marital Status Married		Married			
Marital Status Code M Value in: v.1		M			
Citizenship	UNITED STATES	UNITED STATES			
Citizenship Code	USA	USA			
Ethnicity					
Ethnicity	Not Hispanic or Latino	Not Hispanic or Latino			
Ethnic Group Code	N	N			
Race	White	White			
Race Code	WH	WH			
Master Child Id					
Master Created Date					
Master Modified Date					
Class					
Owning Master Object Type					
Status					
Status Reason					
Names Addresses					

Compare Source Page

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



On the Compare Source page, the details of the instance record are displayed on the left and corresponding source record details are displayed on the right side of the page.

The instance record format is presented in a similar to the format of a golden record on the Master Comparison page.

The Compare Source page contains the following areas:

- 1. Records properties.
- 2. Grouped attribute sections.
- 3. Subdomain section(s).

Grouped attribute sections and Subdomain section(s) can be configured using the Admin Console for the corresponding instance table. For more information, see *Using the Admin Console* on page 45.

Instance Record		Source Record			
lecord Properties	Source Name: WayTestSystem Omni Modified Date: Source Instance Id: 11112059MRN	1			
Demographics					
Ethnicity					
Race Code					
Master Id	111				
Class					
Omni Status	A	A			
Omni Status Reason					
Owning Object					
Source Updated Date					
O Name 1					
Class					
Class					
Class Degree First Name	Jacoby	Jacoby	_		
Class Degree First Name Last Name	Jacoby Rollins	Jacoby ROLLINS			
Class Degree First Name Last Name Middle Name	Jacoby Rollins G	Jacoby ROLLINS G.			
Class Degree First Name Last Name Middle Name Omni Created Date	Jacoby Rollins G 01/09/2014	Jacoby ROLLINS G. 01/14/2014			
Class Degree First Name Last Name Middle Name Omni Created Date Omni Modfiled Date	Jacoby Rollins G 01/09/2014	Jacoby ROLLINS G. 01/14/2014			
Class Degree First Name Last Name Middle Name Omni Created Date Omni Modflied Date Omni Status Reason	Jacoby Rollins G 01/09/2014	Jacoby ROLLINS G. 01/14/2014			
Class Degree First Name Last Name Middle Name Omni Created Date Omni Modflied Date Omni Status Reason Transaction Id	Jacoby Rollins G 01/09/2014 4f249ce8-c03a-4666-a5e1-1cab	Jacoby ROLLINS G. 01/14/2014 a05fc4666-c561-46a2-9591-8bb0d786eb61			
Class Degree First Name Last Name Middle Name Omni Created Date Omni Modflied Date Omni Status Reason Transaction Id Name Type	Jacoby Rollins G 01/09/2014 4t249ce8-c03a-4666-a5e1-1cab	Jacoby ROLLINS G. 01/14/2014 a05fc466-c561-46a2-9591-8bb0d786eb61			

Values of attributes in the source record that are different from the attribute values in the instance record are highlighted in pink. The values that are common (standardized) to both records are highlighted in yellow

Compare source functionality is also available on the Master Comparison page for historic records.



Using Omni-HealthData Remediation

This section introduces and provides an overview for Omni-HealthData Remediation.

In this chapter:

Overview

Overview

Omni-HealthData[™] Remediation is a core component of Omni-HealthData Governance Console (OHDGC). This facility provides a browser-based comprehensive data remediation tool for manually resolving and reporting data issues, including data cleansing issues, record inconsistency issues, and Master Data Management (MDM) matching and merging issues. Omni-HealthData Remediation allows data stewards and data supervisors to resolve various data quality defects.

Omni-HealthData Remediation is available as a web application after logging on to OHDGC. All users must first be authenticated and authorized (with roles and privileges) by OHDGC and the corresponding WSO2 Identity Server (WSO2 IS) component, before obtaining access to Omni-HealthData Remediation. For more information, see the *Omni-HealthData Governance Console Remediation User's Guide*.

Overview



Using the Admin Console

This appendix describes how to use the Admin Console to configure administrative properties and functions that are reflected in Omni-HealthData 360 Viewer.

In this appendix:

- Configuring Domains
- Configuring Table Columns Displayed in Pages
- Configuring Table Columns for Record Details
- Configuring Subdomain Links for the Advanced Search Page
- Configuring Frequently Searched Fields for the Advanced Search Page
- Configuring Search Fields (Except Frequently Searched) and Attributes for the Advanced Search Page
- Configuring Subdomain Links for the Details 360 and Master Comparison Pages
- Configuring Domain and Subdomain Section Attributes (Details 360, Master Comparison, and Compare Source Pages)
- Configuring Record Properties Section Attributes
- Configuring Column Dimensions and Identifying Columns to be Sorted and Filtered

Configuring Domains

To configure domains, click the Table Order tab, as shown in the following image.

Sources Views	Options Tables	Table Order	Settings	Exceptions	
Table Order List	🖋 Edit Table Order	🗎 Delete			 Help
Title	Master Tab	le Order			
Name	masterTab	eOrder			
Tables	Patien Provid Practic Facility Corgan Organ Memb Payert Worke	Master erMaster erFacilityMaster eFacilityMaster LocationMaster zationalUnitMast erMaster faster Master Master	er		
A Home✓ Contacts	▲ Download Metao ▲ Upload Metadata	ata I			Back to top

Configuring Table Columns Displayed in Pages

To configure table columns that are displayed in Omni-HealthData 360 Viewer pages (for example, the Home page and Search Result page), edit the Master table and include or exclude the required columns in the Grid Result View tab, as shown in the following image.

	Sources Views	s Ор	tions	Tables	Table	Order	Settings	Excep	otions				
	III Tables List	+ New	Table	🖋 Edit	Table	🗊 Dela	le						Help
		Source	OGC	Source									
		Table	Patie	ntMaster									
		Name	Pati	ientMaster									
	Record	i Name	Pati	ientMaster									
	Info Tab In	idicator		OFF									
	Ist	Logged		OFF									
	Use multise default	elect for values	0	N]								
	Grouped Grid View	w X	Manu	al Override	Popup	View 🗙	Case P	roperties	View 🗶	Breadcrumb	View X		
	Related Instances	View 🗙	F	requent Se	arch Vie	ew X	Advanced	Search	View 🗙	Record Prope	erties View 🗶	Full Info Vie	w ×
	Quick Details View	××	Grid R	esult View	×	My Case	s Filter Viev	/ ×	All Cases	Filter View 🗙	Case Issues	s Grid View X	
	Ticket Issues Grid	View X	D	QM Filters	×	DQM Bre	akouts 🗙	DQI	A Grid Viev	y ≍ + Add	view *		
1	ncluded:								Excluded:				
	Masterid 🖋					×	<<	>>	Adopted	1			-
									Adopted	Description 🖋			
									Adopted	ld 🖋			
									AnimalB	reed 🖋			
									AnimalB	reedDescriptio	n 🥒		
nde	ev.								AnimalB	reedid 🖋			

Configuring Table Columns for Record Details

To configure table columns that are displayed in Omni-HealthData 360 Viewer pages for record details, edit the table and include or exclude the required columns in the Quick Details View tab, as shown in the following image.

Sources Views Op	ptions Tables	Table Order	Settings	Exceptions		
Tables List + New	v Table 🕜 Edit	Table 🗊 De	lete			Help
Source	OGCSource					
Table	PatientMaster					
Name	PatientMaster					
Record Name	PatientMaster					
Info Tab Indicator	OFF					
Is Logged	OFF					
Use multiselect for default values	ON					
Grouped Grid View X	Manual Override	e Popup View 🗙	Case Prop	erties View 🗙	Breadcrumb View 🔀	
Related Instances View 3	Frequent Se	earch View 🗙	Advanced Se	arch View 🗶	Record Properties View $ imes$	Full Info View 🗙
Quick Details View 🗙	Grid Result View	My Cas	es Filter View 🕽	All Cases	Filter View 🗶 🛛 Case Issues	Grid View 🗙
Ticket Issues Grid View 🕽	C DQM Filters	DQM Br	reakouts 🗙	DQM Grid View	+ Add view →	
Included:				Excluded:		
Col1		×	^ <u><< ></u>	Adopted	1	
OmniCreatedDate 🖉		×		Adopted	Description 🖋	
Tax ID		×		Adopted	d 🖋	
TaxidType 🖋		×		AnimalBr	reed 🖌	
Taxid 🖋		×		AnimalBr	reedDescription 🖋	
Tax ID		×		AnimalBr	reedid 🖋	

Configuring Subdomain Links for the Advanced Search Page

To configure subdomain links that are displayed in Omni-HealthData 360 Viewer for the Advanced Search page, edit the table and include or exclude the required links in the Advanced Search View tab for the corresponding table, as shown in the following image.

Related Instances View 🗙	Frequent Search View	Advanced Sea	arch View X Record Properties View X Full Info View	×
Quick Details View 🗙 🛛 G	rid Result View 🗙 My	Cases Filter View 🗙	All Cases Filter View X Case Issues Grid View X	
Ticket Issues Grid View 🗙	DQM Filters X DQ	M Breakouts 🗙 🛛 [DQM Grid View 🗶 🔹 + Add view 👻	
Included:			Excluded:	
id 🖋		x << >>	Adopted 🖋	
			AdoptedDescription <i>P</i>	
			AdoptedId a	
			AnimalBreed 🖋	
			AnimalBreedDescription 🖋	
			AnimalBreedId 🖋	
			AnimalGenderStatus 🖋	
			AnimalGenderStatusDescription 🖋	
			AnimalGenderStatusId 🖋	
			AnimalProductionClass J	
			AnimalProductionClassDescription 🖋	-
Group Add Group Links	- Add			
Included:			Excluded:	
		<< >>	MultiRaceCodes 🖋	
			OtherAddresses A	
			OtherEmails 🖋	
			Otherldentifiers 🖋	
			OtherNames 🖋	

Configuring Frequently Searched Fields for the Advanced Search Page

To configure frequently searched fields displayed in Omni-HealthData 360 Viewer for the Advanced Search page, edit the table and include or exclude the required fields in the Frequent Search View tab for the corresponding table, as shown in the following image.

Sources Views Opt	ions Tables Table Order	Settings Excep	otions	
Tables List + New	Table 🥜 Edit Table 🗍 🛈 Del	ete) Help
Source	OGCSource			
Table	PatientMaster			
Name	PatientMaster			
Record Name	PatientMaster			
Info Tab Indicator	OFF			
Is Logged	OFF			
Use multiselect for default values	ON			
Grouped Grid View 🗙	Manual Override Popup View 🗙	Case Properties	s View 🗶 🛛 Breadcrumb View 🗶	
Related Instances View X	Frequent Search View 🗙	Advanced Search	View X Record Properties View X Full Info View	20
Quick Details View 🗙	Grid Result View X My Case	es Filter View 🔀	All Cases Filter View 🗙 👘 Case Issues Grid View 🗙	
Ticket Issues Grid View 🗙	DQM Filters 🗶 🛛 DQM Br	eakouts X DQN	M Grid View 🗶 🔹 + Add view 👻	
Included:			Excluded:	
Masterid 🖋	×	<< >>	Adopted 🥒	
FirstName 🖋	×		AdoptedDescription 🖋	
LastName 🖋	×		Adoptedid a	
Taxid 🖋	×		AnimalBreed 🖋	
			AnimalBreedDescription a	3
			AnimalBreedid 🖋	3

Configuring Search Fields (Except Frequently Searched) and Attributes for the Advanced Search Page

To configure search fields and their corresponding attributes that are displayed in Omni-HealthData 360 Viewer for the Advanced Search page (except frequently searched), edit the table and include or exclude the required fields in the Advanced Search View tab, as shown in the following image.

Sources Views Options	Tables Table Order	Settings Exce	ptions		
📰 Tables List 🛛 🕂 New Table	ie 🕜 Edit Table 🔒 D	elete		0	Help
Source OC	GCSource				
Table Pa	atientMaster				
Name	PatientMaster				
Record Name	PatientMaster				
Info Tab Indicator	OFF				
Is Logged	OFF				
Use multiselect for default values	ON				
Grouped Grid View X Mar	nual Override Popup View	Case Propertie	s View 🗶 🛛 Breadon	umb View 🔀	
Related Instances View X	Frequent Search View $ imes$	Advanced Search	View X Record F	Properties View X Full Info View	×
Quick Details View 🗶 🛛 Grid	d Result View 🗶 🛛 My Ca	ses Filter View 🗶	All Cases Filter View	X Case Issues Grid View X	
Ticket Issues Grid View 🗙	DQM Filters 🗶 👘 DQM E	Breakouts 🗶 🛛 DQ	M Grid View 🗙 🛛 + /	Add view 👻	
Included:			Excluded:		
id 🖋	1	e 🤜 🔛	Adopted 🖋		-
AnimalBreedid		C	Adoptedid 🖋		
AdoptedDescription a	,	c	AnimalBreed 🖋		
1			AnimalBreedDescri	ption 🖋	
			AnimalGenderStatu	s/	
			AnimalGenderStatu	sDescription 🖋	

Configuring Subdomain Links for the Details 360 and Master Comparison Pages

To configure subdomain links that are displayed in Omni-HealthData 360 Viewer for the Details 360 page and Master Comparison page, edit the master table and include or exclude the required links in the Full Info View tab, as shown in the following image.

Related Instances View 🗶 👘 Frequent Search	View 🗙	Advanced Search View X Record Properties View X Full Info View X
Quick Details View X 🛛 Grid Result View 🗙	My Case:	s Filter View 🗶 🛛 All Cases Filter View 🗶 Case Issues Grid View 🗶
Ticket Issues Grid View 🗶 🔹 DQM Filters 🗶	DQM Bre	akouts X DQM Grid View X + Add view -
Included:		Excluded:
Deceased 🖋	× -	Adoptedid /
DeceasedDescription d ^a	×	AnimalBreed
DateOfDeath 🖋	×	
CauseOfDeath 🖋	×	
Citizenship 🖋	×	
CitizenshipDescription a*	×	AnimalGenderStatus
EthnicGroup /	×	AnimalGenderStatusDescription 🖋
Ethnic Croup Description		AnimalGenderStatusid 🖋
	-	AnimalProductionClass /
Race	×	AnimalProductionClassDescription #
RaceDescription 🖋	×	AnimalProductionClassId a
Religion 🖍	×	Animal Species 🖋 🔹 👻
Broup Add Group Add		
ncluded:		Excluded:
MultiRaceCodes 🖋	×	< >> cases /
OtherIdentifiers 🖋	×	instances 🥒
OtherAddresses 🖋	×	
OtherNames 🖋	×	
OtherPhoneNumbers 🖋	×	

Configuring Domain and Subdomain Section Attributes (Details 360, Master Comparison, and Compare Source Pages)

To configure attributes that are displayed in Omni-HealthData 360 Viewer for the Domain and Subdomain sections (Details 360, Master Comparison, and Compare Source pages), include or exclude the required columns in the Full Info View tab, as shown in the following image.

Sources Views Op	ptions Tables	Table Order	Settings	Exceptions			
i≣ Tables List + New	v Table 🥜 Edit 1	Table 🔋 🗊 Dele	ete				0 Help
Source	OGCSource						
Table	PatientMaster						
Name	PatientMaster						
Record Name	PatientMaster						
Info Tab Indicator	OFF						
Is Logged	OFF						
Use multiselect for default values	ON						
Grouped Grid View 💥	Manual Override	Popup View 🗙	Case Pr	operties View 🗶	Breadcrumb View 🗙		
Related Instances View	Frequent Sea	arch View 🗶	Advanced	Search View 🗙	Record Properties Vie	w 🕱 🛛 Full Info Viev	v ×
Quick Details View 💥	Grid Result View	X My Case	s Filter View	X All Cases	Filter View 💥 🛛 Case	Issues Grid View 💥	
Ticket Issues Grid View	C DQM Filters	X DQM Bre	eakouts 🗙	DQM Grid View	r ≍ → Add view -		
Included:				Excluded:			
LastName 🖉		×		Adopted	ld 🥜		
MiddleName 🖉		×		AnimalB	reed 🖋		
Name Suffix 🖋		×		AnimalB	reedDescription 🖋		
Primary Phone 🖋		×		AnimalB	reedid 🖋		
MobilePhone &		×		AnimalG	enderStatus 🖋		
EMail 🖋		×		AnimalG	enderStatusDescriptio	n 🖋	

Configuring Record Properties Section Attributes

To configure attributes that are displayed in Omni-HealthData 360 Viewer for the Record Properties section, include or exclude the required columns in the Record Properties View tab, as shown in the following image.

Sources Views Options Ta	bles Table Order	Settings Excep	ations		
III Tables List 🕂 New Table 🗾	P Edit Table 🗊 Delete	e			🛛 Help
Source OGCSour	rce				
Table PatientMa	aster				
Name Patiently	faster				
Record Name Patient/	faster				
Info Tab Indicator	OFF				
is Logged	OFF				
Use multiselect for ON default values					
Grouped Grid View 🗶 🛛 Manual Ov	verride Popup View 🗙	Case Properties	: View 🗶 🛛 Breadcr	umb View 🗶	
Related Instances View X Frequ	ent Search View 🗙	Advanced Search	View X Record F	Properties View 💥	Full Info View 🗙
Quick Details View X Grid Resul	t View 🗶 👘 My Cases	Filter View 🗙	All Cases Filter View	X Case Issues	Grid View 🕷
Ticket Issues Grid View 🗶 DQM	Filters 🗙 👘 DQM Brea	akouts 🗙 🛛 DQN	I Grid View 🗙 🛛 +	Add view 👻	
Included:		E	Excluded:		
Masterid 🖋	×	<< >>	Adopted 🖋		A
MasterStatus 🖋	×		AdoptedDescriptio	n 🖋	
MasterStatusCode 🖋	×		Adoptedid 🖋		
MasterStatusCodeDescription &	×		AnimalBreed 🖋		
OmniCreatedDate 🖋	×		AnimalBreedDescr	iption 🖋	
OmniModifiedDate 🖋	×		AnimalBreedid 🖋		

Configuring Column Dimensions and Identifying Columns to be Sorted and Filtered

To configure the column size, alignment of columns, and specify what columns can be sorted and filtered in Omni-HealthData 360 Viewer, click the corresponding pencil icon for the column in the Grid Result View tab, as shown in the following image.

Sources Views Op	otions Tables Ta	ble Order	Settings	Exceptions		
III Tables List 🛛 🕂 New	/ Table 🕜 Edit Table	🖹 🗎 Dele	te			🛛 Help
Source	OGCSource					
Table	PatientMaster					
Name	PatientMaster					
Record Name	PatientMaster					
Info Tab Indicator	OFF					
Is Logged	OFF					
Use multiselect for default values	ON					
Grouped Grid View 🗙	Manual Override Pop	up View 🗙	Case Pro	perties View 🗶	Breadcrumb View	c
Related instances View	Frequent Search	View 🔀	Advanced 5	earch View 🗙	Record Properties Vi	ew 🗙 🛛 Full Info View 🗙
Quick Details View 🗙	Grid Result View 🗙	My Case	s Filter View	X All Cases	Filter View 🗶 🛛 Cas	e Issues Grid View 🗙
Ticket Issues Grid View 🕽	DQM Filters X	DQM Bre	akouts 🗙	DQM Grid View	+ Add view 🝷	
ncluded:				Excluded:		
Masteric		×		Adopted	/	×
FuliName 🖋		×		Adopted	Description 🖋	
LastName		×		Adopted	d 🖋	
FirstName 🖋		×		AnimalB	reed 🖉	
BiologicalSexDescriptio	r 🖋	×		AnimalB	reedDescription 🖋	
DateOfBirth 🖋		×		AnimalB	reedid 🖋	

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