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Preface

This manual describes how to use Omni-Payer™ 360 Viewer, which is a core component of Omni-Payer Management Central. This facility provides a browser-based comprehensive view of the golden records that are mastered across Omni domains (for example, Member and Provider). This manual is intended for Omni-Payer administrators and data stewards.

How This Manual Is Organized

This manual includes the following chapters:

<table>
<thead>
<tr>
<th>Chapter/Appendix</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Introducing Omni-Payer 360 Viewer</td>
<td>Provides an overview of Omni-Payer 360 Viewer.</td>
</tr>
<tr>
<td>2 Understanding the Console Layout and User Interface</td>
<td>Describes the menus and options that are found in the user interface and layout of Omni-Payer 360 Viewer.</td>
</tr>
<tr>
<td>3 Available Pages in Omni-Payer 360 Viewer</td>
<td>Describes the available pages in Omni-Payer 360 Viewer.</td>
</tr>
<tr>
<td>4 Using Omni-Payer Data Dictionary</td>
<td>Describes how to configure and use Omni-Payer Data Dictionary.</td>
</tr>
<tr>
<td>A Using the Admin Console</td>
<td>Describes how to use the Admin Console to configure administrative properties and functions that are reflected in Omni-Payer 360 Viewer.</td>
</tr>
</tbody>
</table>

Documentation Conventions

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

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>THIS TYPEFACE</strong> or <strong>this typeface</strong></td>
</tr>
<tr>
<td>Denotes syntax that you must type exactly as shown.</td>
</tr>
<tr>
<td><strong>this typeface</strong></td>
</tr>
<tr>
<td>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.</td>
</tr>
<tr>
<td><strong>underscore</strong></td>
</tr>
<tr>
<td>Indicates a default setting.</td>
</tr>
<tr>
<td><strong>Key + Key</strong></td>
</tr>
<tr>
<td>Indicates keys that you must press simultaneously.</td>
</tr>
<tr>
<td><strong>{}</strong></td>
</tr>
<tr>
<td>Indicates two or three choices. Type one of them, not the braces.</td>
</tr>
<tr>
<td>**</td>
</tr>
<tr>
<td>Separates mutually exclusive choices in syntax. Type one of them, not the symbol.</td>
</tr>
<tr>
<td><strong>...</strong></td>
</tr>
<tr>
<td>Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis (...).</td>
</tr>
<tr>
<td><strong>. . .</strong></td>
</tr>
<tr>
<td>Indicates that there are (or could be) intervening or additional commands.</td>
</tr>
</tbody>
</table>

---

**Related Publications**

You can also contact the Publications Order Department at (800) 969-4636.

**Customer Support**

Do you have questions about this product?
Join the Focal Point community. Focal Point is our online developer center and more than a message board. It is an interactive network of more than 3,000 developers from almost every profession and industry, collaborating on solutions and sharing every tips and techniques. Access Focal Point at [http://forums.informationbuilders.com/eve/forums](http://forums.informationbuilders.com/eve/forums).
You can also access support services electronically, 24 hours a day, with InfoResponse Online. InfoResponse Online is accessible through our website, http://www.informationbuilders.com. It connects you to the tracking system and known-problem database at the Information Builders support center. Registered users can open, update, and view the status of cases in the tracking system and read descriptions of reported software issues. New users can register immediately for this service. The technical support section of www.informationbuilders.com also provides usage techniques, diagnostic tips, and answers to frequently asked questions.

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

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

**Help Us to Serve You Better**

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

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

<table>
<thead>
<tr>
<th>Platform</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating System</td>
<td></td>
</tr>
<tr>
<td>OS Version</td>
<td></td>
</tr>
<tr>
<td>JVM Vendor</td>
<td></td>
</tr>
<tr>
<td>JVM Version</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Adapter Deployment</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Container</td>
<td></td>
</tr>
<tr>
<td>Version</td>
<td></td>
</tr>
</tbody>
</table>
The following table lists iWay-related information needed by our consultants.

<table>
<thead>
<tr>
<th>iWay Adapter</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>iWay Release Level</td>
<td></td>
</tr>
<tr>
<td>iWay Patch</td>
<td></td>
</tr>
</tbody>
</table>

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

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

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
- Service Manager package to reproduce problem
- Custom functions and agents in use
- Diagnostic Zip
- Transaction log

For information on tracing, see the *iWay Service Manager User's Guide*.

**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](http://documentation.informationbuilders.com/connections.asp).

Thank you, in advance, for your comments.

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Introducing Omni-Payer 360 Viewer

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

Topics:
- Overview
- Key Features and Functionality
- Client System Prerequisites
Overview

Omni-Payer 360 Viewer is a core component of Omni-Payer Management Central. This component provides a browser-based comprehensive view of the golden records that are mastered across Omni domains (for example, Member and Provider).

Omni-Payer 360 Viewer is available only after logging on to Omni-Payer Management Central. All users must be first authenticated and authorized with the required roles and privileges before obtaining access to the viewer.

Omni-Payer 360 Viewer is a web application that can be deployed to any compatible application server. It is developed using Grails, which is an open source web application framework that uses the Groovy programming language.

Key Features and Functionality

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

- Viewing a list of golden records across domains.
- Conducting domain simple searches among golden and instance records.
- Conducting domain advanced searches among golden and instance records.
- Viewing details of golden records across domains.
- Viewing and comparing golden records and supporting instance records.
- Viewing subdomain records related to the golden record.
- Comparing instance records with the source record.
- Viewing the history of a golden record.
- Comparing current golden records with earlier versions.

Client System Prerequisites

Before connecting to Omni-Payer 360 Viewer, ensure that the client system contains the prerequisites listed in the following table.

<table>
<thead>
<tr>
<th>Client Component</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating System</td>
<td>Microsoft Windows 7</td>
</tr>
<tr>
<td>Web Browser</td>
<td>Microsoft Internet Explorer Version 9 or 10</td>
</tr>
<tr>
<td>Java</td>
<td>Version 1.7</td>
</tr>
</tbody>
</table>
This chapter describes the menus and options that are found in the user interface and layout of Omni-Payer 360 Viewer.

Topics:
- Navigating the General Page Layout
- Navigating the Table Layout
Navigating the General Page Layout

In this section:
Using the Menu Bar
Using the Search Panel
Using the Breadcrumb Trail
Using the Main Page Body

All pages in Omni-Payer 360 Viewer use a common layout, as shown in the following image.

Each page contains the following areas:

1. Menu bar
2. Search panel
3. Breadcrumb trail
4. Main page body

Using the Menu Bar

The menu bar displays different items depending on whether unauthenticated users (guests) or authenticated users are accessing Omni-Payer 360 Viewer.
2. Understanding the Console Layout and User Interface

For unauthenticated users, the menu bar displays the following items:

- Login button.
- About drop-down menu.

For authenticated users, the menu bar displays the following items:

- Omni-Payer Data Management Central component buttons.
- Administration drop-down menu for the appropriate user role (for example, Data Steward, Admin, and so on).
- Current user details, including the user name and role (in parentheses).
- About drop-down menu.

The About drop-down menu contains the About Omni Payer option, as shown in the following image.
Clicking About Omni-Payer, displays a dialog box that contains Omni-Payer source and build information, as shown in the following image.

![About Omni-Payer dialog box](image)

**Using the Search Panel**

The search panel is divided into separate areas, as shown in the following image.

![Search Panel](image)

1. Omni-Payer 360 Viewer logo
2. Domain drop-down menu
3. Simple Search input field
4. Advanced Search button and drop-down menu
For more information on using the search panel to perform simple and advanced searches, see *Using the Search Panel* on page 18.

**Using the Breadcrumb Trail**

Breadcrumbs allow you to keep track of your navigation within Omni-Payer 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.

For more information on using the various pages in Omni-Payer 360 Viewer, see *Available Pages in Omni-Payer 360 Viewer* on page 23.
Navigating the Table Layout

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

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 a 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.

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 69.

**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.

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

Topics:
- Login Page
- Home Page (Domain Main Page)
- Performing Simple Searches for Golden Records
- Performing Advanced Searches for Golden Records
- Search Results Page
- Details 360 Page
- Master Comparison Page
- Master Comparison Page of Historic Records
- Compare Source Page
Login Page

All users of Omni-Payer 360 Viewer 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-Payer 360 Viewer that is displayed.

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 login attempt, a message indicating that invalid credentials were entered, as shown in the following image.

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-Payer 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 69.
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 69.

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 69.
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.

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. It is also possible to select all of the available domains clicking the All option from the domain drop-down menu. 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 69.

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 Simple Searches for Golden Records

You can initiate a simple search by entering data into the simple search input field and pressing Enter or clicking Search. The selected domain (for example, Member and Provider) is scanned for a match based on the first name, last name, or specific identifier that you entered. You can select a specific domain to locate records from the domain drop-down menu in the search panel. Wildcard searches are supported. The scope of the search is defined by the domain that is currently selected.

The search results have the same format as a list of records that is displayed on the Home page (Domain main page).

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.

The Advanced Search page contains the following areas:

1. **Domain tabs.** Allow you to change domain for search.

2. **Grouped attribute areas.** Allow you to enter search parameters.

3. **Search, Clear, and Close buttons.** Allow you to execute searches, clear specified criteria, and close the search overlay without executing the search.

4. **Subdomain links.** Allow you to search by subdomain record parameters. The list of displayed subdomains can be configured in the Admin Console. For more information, see *Using the Admin Console* on page 69.
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 69. 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.

![Image](image_url)

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 69.
Search Results Page

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.

![Search Results Page](image1)

**Search Results Page**

After a simple search is performed by the specified criteria, the results are returned as rows in the Search results page, as shown in the following image.

![Search Results Page](image2)
A validation mechanism exists for simple search functionality. If you perform a simple search using less than 3 alphanumeric characters, the following message is displayed in the 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.

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.

This same mechanism works for advanced search functionality, but the breadcrumb trail will also contain the search criteria.
Details 360 Page

To view detailed information for a specific record (for example, member), 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 (Member 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 69.

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

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 69.

The Names tab for a subdomain displays all of the names that existed in the Member 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 69.

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 69.

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.

![Master Comparison Page](image)

### Master Comparison Page

**In this section:**
- Using the Instance Records Overlay Window
- Performing Simple Searches for Instance Records
- Performing Advanced Searches for Instance Records
- Viewing the Search Results Page for Instance Records

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.

The Master Comparison page contains the following areas:

1. **View History button.** Allows you to view a list of versions for the golden record.
2. **Show Instances link.** Expands the instance records section.
3. Record Properties section.

4. Grouped attribute section(s).

5. 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 69.

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 69.

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 69.

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 69.

Subdomains are essential attributes of a golden record that are not uniquely identified in the record. Subdomains are almost always a many-to-one relationship with the base record. These subdomains 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.

**Using the Instance Records Overlay Window**

The Instance Records overlay window contains the following areas:

1. **Simple Search input.**
2. **Advanced Search link.** Opens the Advanced Search page.

3. **List of Instance records.** Shows all instances or search results.

4. **Done button.** Closes the dialog and displays only the selected instance records on the Master Comparison page.

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 69.

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.
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.

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.
4. Subdomain links. Allow you to search by subdomain record parameters. The list of displayed subdomains can be configured in the Admin Console. For more information, see Using the Admin Console on page 69.
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 69. 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.

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 69.

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.
Viewing the Search Results Page for Instance Records

After a simple search was performed using existing criteria, the resulting rows are displayed, as shown in the following image.

All of the records are selected by default.

For the Advanced Search results page, the search query parameters are summarized above the search results, as shown in the following image.
When you perform a search using invalid search criteria, an appropriate message is displayed on the Search results page, as shown in the following image.

![Search Results Message](image)

You can navigate to the Advanced Search dialog by clicking the Advanced Search link or go back to the full list of instances if you click Done.

**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 and creation date are displayed for each record, as shown in the following image.

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.

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 69.
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 dropdown menu](image)

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 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.

![Compare Source](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 69.

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.
This section describes how to configure and use Omni-Payer Data Dictionary.

**Topics:**
- Introduction
- Omni-Payer Data Dictionary Page Structure
- Using the Administration Console to Configure Properties for Code Sets and Database Objects
Introduction

In this section:

Page Overview

Omni-Payer Data Dictionary is a separate component of Omni-Payer Management Central (OPMC). The data dictionary provides a detailed view of the source system and Omni-Payer metadata, as well as reporting data mart metadata. Omni-Payer Data Dictionary currently contains the following modules:

- Code Sets Viewer
- Database Objects Viewer

Page Overview

The Code Sets Viewer displays mappings between code sets from the available source systems and content of the code sets themselves. You can browse a list of code sets and view a table displaying the mappings between code sets in a source system belonging to a customer and Omni-Payer.

The Database Objects Viewer shows the table and column details of the databases from which the data is imported into Omni-Payer. From the available drop-down list, you can select the various databases that are available, and select any node (table or column) in the left pane to view descriptive information for that node in the right pane.
Omni-Payer Data Dictionary Page Structure

In this section:
Top Panel
Code Sets Viewer
Database Objects Viewer

The Omni-Payer Data Dictionary page uses a common layout, as shown in the following image.

The Omni-Payer Data Dictionary page contains the following areas:

1. Omni-Payer Management Central (OPMC) navigation menu.
2. Top panel containing the Data Dictionary header and navigation tabs.
4. Details panel.
The OPMC navigation menu follows the standard behavior and allows you to navigate between the application modules.

**Top Panel**

The following image shows the top panel of the Omni-Payer Data Dictionary page in more detail.

![Top Panel Image]

The top panel contains the following areas:

1. Omni-Payer Data Dictionary logo.
2. Code Sets tab.
3. Database Objects tab.
To navigate to the Code Sets tab, you must first click *Data Dictionary* in the Omni-Payer Management Central (OPMC) navigation menu. By default, before you select a source system from the drop-down list, the Details panel of the system is blank.

To begin working with code sets, you must select a source system from the Source System drop-down list in the Navigation panel.
The Source System drop-down list is populated with available source systems that can be selected, as shown in the following image.
Navigation Panel

Once a source system is selected from the Source System drop-down list, the Navigation panel is populated with a list of corresponding code sets for the selected source system, as shown in the following image.

The Navigation panel contains the following areas:

1. Search field.
2. List of code sets for the selected source system.

**Searching Code Sets**

A search field is available in the Navigation panel, which allows you to search through a list of code sets. To search through a list of code sets, enter your search terms in the field and click the search icon to the right of the field or press Enter, as shown in the following image.

![Search Field](image)

**Note:** The behavior of the search is not case-sensitive and locates only those code sets that begin with the search term entered.

To cancel a search, delete any search terms in the field and click the search icon to the right of the field or press Enter.

**Details Panel**

You can select a specific node from the tree structure by clicking on the title of a subject area.
When you select a corresponding node, the Details panel displays the code set mapping information between the selected code set and Omni-Payer using a table format, as shown in the following image.

The structure of this table can be configured in the Administration Console if required. For more information, see Using the Administration Console to Configure Properties for Code Sets and Database Objects on page 63.

The code set table provides the following functionality:

1. Sorting by columns.
2. Filtering by multiple queries.
3. Pagination.
4. Drop-down list for the record quantity.

**Sorting**

You can sort the code set table by column by clicking on the column header or sorting icon.

The option to sort by columns can be configured in the Administration Console if required. For more information, see Using the Administration Console to Configure Properties for Code Sets and Database Objects on page 63.
Filtering

Inline filters can be used to quickly find a specific value. When a value is entered into the filter field at the top of each column, only rows that match this filtering criteria are displayed.

Filtering can also be applied by multiple queries. To discard filtered results, delete any filter terms in the filter field.

The option to filter can be configured in the Administration Console if required. For more information, see Using the Administration Console to Configure Properties for Code Sets and Database Objects on page 63.

Pagination

You can navigate through any pages of information that are returned by clicking on a specific page number, or clicking on the appropriate arrow. A single arrow moves to the next page (one page at a time). A double arrow takes you to the first or last page (depending on the direction selected). You can also select a number of records to display in the table by default by selecting a number from the drop-down list. The data will reload automatically.
Database Objects Viewer

In this section:
Navigation Pane
Searching Database Objects
Details Panel

The Database Objects Viewer shows the Table and Column details of the databases from which the data is imported into Omni-Payer, as shown in the following image.

Navigation Pane

You can select the database systems with versions that are available for browsing from the drop-down list, as shown in the following image.
Once a system is selected from the drop-down list, the Navigation panel is populated with a tree of corresponding database objects (tables and columns), as shown in the following image.
**Searching Database Objects**

The Navigation panel contains a search field, which provide functionality to search through a tree of corresponding database objects (tables and columns). To search through a list of database objects, enter your search terms in the field and click the search icon to the right of the field or press Enter.

The search is performed only for the source system that is currently selected. The behavior of the search is not case-sensitive and finds all tables and columns that match the search criteria, even partially.

If the node name of a child matches the query but not the parent, then all parent nodes are displayed and expanded.

The Details panel does not change until you select any of the search results or cancel the search.

To cancel a search, delete any search terms in the search field and click the search icon to the right of the field or press Enter.

**Details Panel**

You can select any node from the left pane and navigate the hierarchy as required. When you click on a table name header, the table node is expanded and the list of columns is displayed. At the same time, the Details panel is populated with the information about the selected object.
To view a column property, click a Column Title link in the Details panel or click a column in the navigation tree.

Information that can be displayed in the Details panel is metadata driven and can be configured in the Administration Console if required. For more information, see Using the Administration Console to Configure Properties for Code Sets and Database Objects on page 63.

The Details panel for a selected table contains:

1. Database quick details.
2. Table quick details.
3. Table of columns that belong to that table, which includes descriptive information.
The following image shows the structure of the Details panel that is displayed when a database object is selected.

The Details panel contains the following information:

1. Database quick details.
2. Table quick details.
3. Column quick details.
4. Column full information.
5. Include and Exclude rules if they exist.

**Using the Administration Console to Configure Properties for Code Sets and Database Objects**

**In this section:**

- Configuring Properties for Code Sets
- Configuring Properties for Database Objects

This section describes how you can use the Administration Console to configure properties for code sets and database objects.
**Note:** The Administration Console is available only for users with system administrator roles.

**Configuring Properties for Code Sets**

To configure properties for code sets, navigate to the Administration Console by clicking *Administration* in the Omni-Payer Management Central (OPMC) navigation menu. Edit the Source Codes table that is displayed in the Table List grid on the Tables tab.

To configure the Source Code Set and Omni Code Set sections, select the Source Codes table and then edit the Grouped Grid View section, as shown in the following image.

![Image of Grouped Grid View section](image)

The Grouped Grid View section contains the following groups:

1. Source Code Set columns
2. Omni Code Set columns
To change the column display name, whether sorting and filtering can occur, click the pencil icon for a specific column and update the corresponding options, as shown in the following image.

The column main properties that are visible in the Code Set table include:

1. Title, which is responsible for the column title in headers.
2. Sorting functionality for that column.
3. Filtering functionality for that column.
Configuring Properties for Database Objects

In this section:
Table Properties
Column Properties

To configure properties for database objects, navigate to the Administration Console by clicking Administration in the Omni-Payer Management Central (OPMC) navigation menu. Edit the database table that is displayed in the Table List grid on the Tables tab. A list of included columns are displayed in the Quick Details View for the database.

Table Properties

To configure properties for selected tables that are displayed in the Details panel, navigate to the Administration Console by clicking Administration in the Omni-Payer Management Central (OPMC) navigation menu. Edit the table that is displayed in Table List grid on the Tables tab. A list of included columns are displayed in the Quick Details View for the table.
Columns that are displayed in the grid for database tables can be configured in the columns table within the Grid Result View section. In addition, configuration of nested columns (display name, sorting, and filtering functionality) is available.

Column Properties

To configure properties for selected columns that are displayed in the Details panel, navigate to the Administration Console by clicking Administration in the Omni-Payer Management Central (OPMC) navigation menu. Edit the Columns table that is displayed in the Table List grid on the Tables tab. A list of columns that are currently included is displayed in the Quick Details View section.

Column properties can be configured from the Columns table in the Full Info View section.

Include and Exclude Rule columns can be configured from the Include Rules and Exclude Rules tables, in the Full Info View section. If required, the title can be changed by configuring the title of a column that is placed in that view.
This appendix describes how to use the Admin Console to configure administrative properties and functions that are reflected in Omni-Payer 360 Viewer.

**Note:** As the display changes that are made using the Admin Console are implemented on a system-wide basis (not on an individual user basis), the use of the Admin Console, as documented in this appendix, is limited to users with the *System Administrator* role assigned in the WSO2 Identity Server.

**Topics:**
- 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 Sets tab, as shown in the following image.
Configuring Table Columns Displayed in Pages

To configure table columns that are displayed in Omni-Payer 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 GridResultView tab, as shown in the following image.
Configuring Table Columns for Record Details

To configure table columns that are displayed in Omni-Payer 360 Viewer pages for record details, edit the table and include or exclude the required columns in the QuickDetailsView tab, as shown in the following image.
Configuring Subdomain Links for the Advanced Search Page

To configure subdomain links that are displayed in Omni-Payer 360 Viewer for the Advanced Search page, edit the table and include or exclude the required links in the AdvancedSearchView tab for the corresponding table, as shown in the following image.
Configuring Frequently Searched Fields for the Advanced Search Page

To configure frequently searched fields displayed in Omni-Payer 360 Viewer for the Advanced Search page, edit the table and include or exclude the required fields in the FrequentSearchView tab for the corresponding table, as shown in the following image.
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-Payer 360 Viewer for the Advanced Search page (except frequently searched), edit the table and include or exclude the required fields in the AdvancedSearchView tab, as shown in the following image.
Configuring Subdomain Links for the Details 360 and Master Comparison Pages

To configure subdomain links that are displayed in Omni-Payer 360 Viewer for the Details 360 page and Master Comparison page, edit the master table and include or exclude the required links in the FullInfoView tab, as shown in the following image.
Configuring Domain and Subdomain Section Attributes (Details 360, Master Comparison, and Compare Source Pages)

To configure attributes that are displayed in Omni-Payer 360 Viewer for the Domain and Subdomain sections (Details 360, Master Comparison, and Compare Source pages), include or exclude the required columns in the FullInfoView tab, as shown in the following image.
Configuring Record Properties Section Attributes

To configure attributes that are displayed in Omni-Payer 360 Viewer for the Record Properties section, include or exclude the required columns in the RecordPropertiesView tab, as shown in the following image.
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-Payer 360 Viewer, click the corresponding pencil icon for the column in the GridResultView tab, as shown in the following image.
Configuring Column Dimensions and Identifying Columns to be Sorted and Filtered
Reader Comments

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