iWay Software
An Information Builders Company

iWay

Omni-Patient™ Management Central Administration Console User's Guide

Version 2.3.3.2

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Contents

Preface

This documentation describes how to perform administration tasks for Omni-Patient™ Management Central (OPMC). Omni-Patient™ Management Central provides a web-based administration console that you can use to configure the application.

How This Manual Is Organized

This manual includes the following chapters:

	Chapter/Appendix	Contents
1	Introducing the Omni-Patient™ Management Central Administration Console	Introduces the Omni-Patient™ Management Central (OPMC) administration console.
2	Configuring Application Components	Describes how to configure Omni-Patient™ Management Central (OPMC) application components using the administration console.

Documentation Conventions

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

Convention	Description
`THIS TYPEFACE` or `this typeface`	Denotes syntax that you must type exactly as shown.
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.
{}	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 the deployment information that our consultants require.

Adapter Deployment	
Container	
Version	
Enterprise Information System (EIS) - if any	
EIS Release Level	
EIS Service Pack	
EIS Platform	

The following table lists iWay-related information needed by our consultants.

iWay Adapter	
iWay Release Level	
iWay Patch	

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

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

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Thank you, in advance, for your comments.

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1 Introducing the Omni-Patient™ Management Central Administration Console

This chapter introduces the Omni-Patient™ Management Central (OPMC) administration console.

Topics:

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

Overview

Omni-Patient™ Management Central (OPMC) provides an administration console that you can use to configure OPMC.

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

Key Features

The Omni-Patient™ Management Central administration console provides a web-based interface to view and edit OPMC configuration details (metadata).

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

- View and edit sources.
- View and edit views, create new views.
- View and edit options, create new options for table, view or source.
- View and edit tables, create new tables.
- View and edit columns.
- View and edit links.
- View and edit Table Order.
- View and edit settings, create new settings.
- Download and upload configuration (metadata.xml) files.

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

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

Accessing the Administration Console

Ensure that the user who is responsible for managing Omni-Patient™ Management Central (OPMC) metadata, modifying application options, and display definitions has the *System Administrator* role in the WSO2 Identity Server user store repository.

1. Enter the URL in your browser to access Omni-Patient™ Management Central (OPMC). For example:

   `https://opmcHostName:8443`

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

Understanding the Layout and Structure of the Administration Console

In this section:

Components Menu

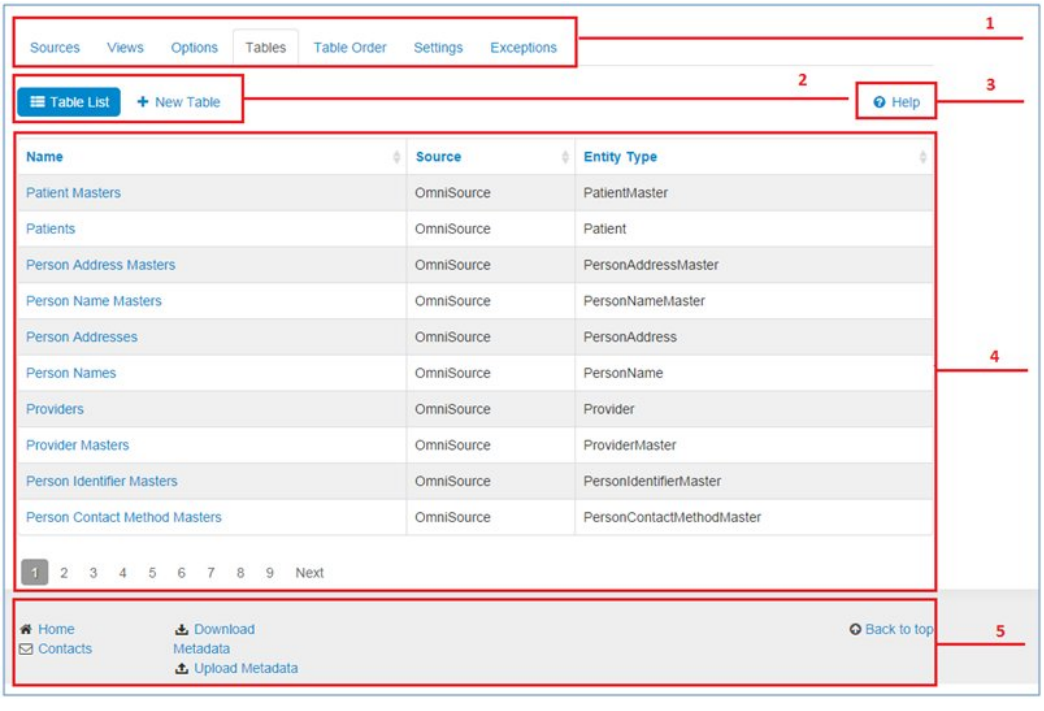
Actions Menu

Help Menu

Content Area

Footer

All pages within the Omni-Patient™ Management Central administration console are unified through a common page layout, as shown in the following image.



Each page contains the following areas:

1. Components menu
2. Actions menu
3. Help menu

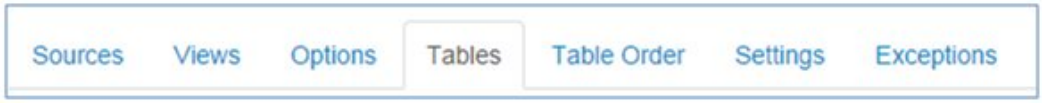
4. Content area
5. Footer

Components Menu

The components menu includes the following tabs:

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

The following image shows the components menu with the Tables tab selected.



Actions Menu

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

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

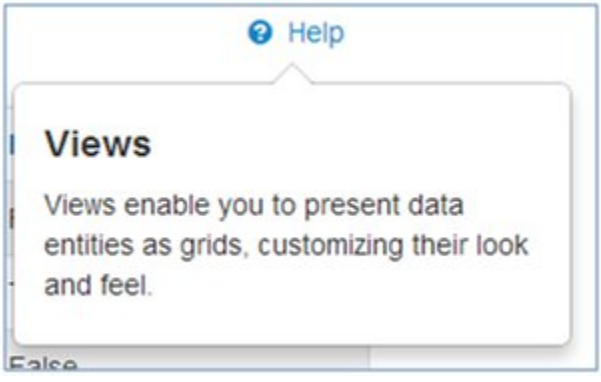
Detailed information about the actions menu is described throughout this documentation.

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

Help Menu

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

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



Content Area

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

Detailed descriptions of different pages are provided throughout this documentation.

Footer

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

2 Configuring Application Components

This section describes how to configure Omni-Patient™ Management Central (OPMC) application components using the administration console.

Topics:

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

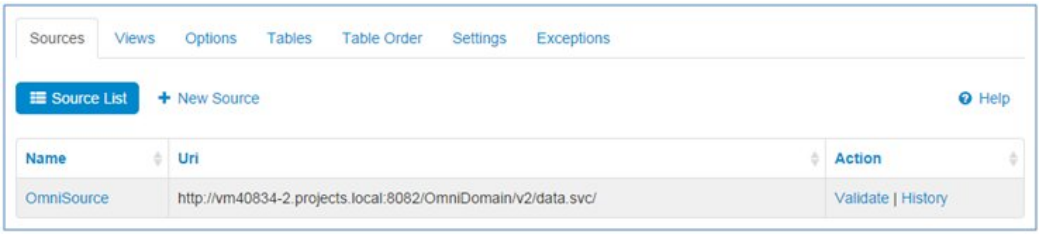
Sources

In this section:

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

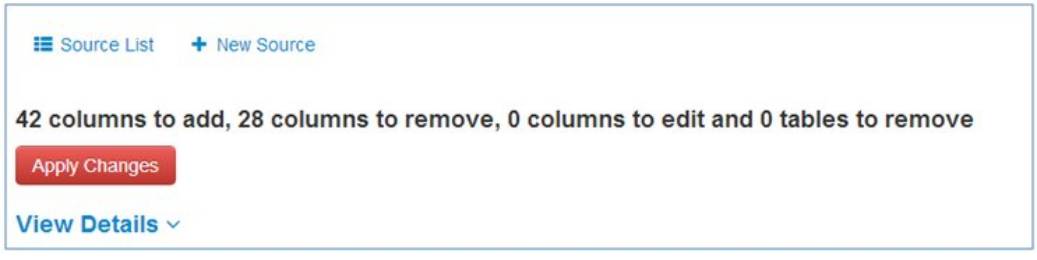
Source List

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

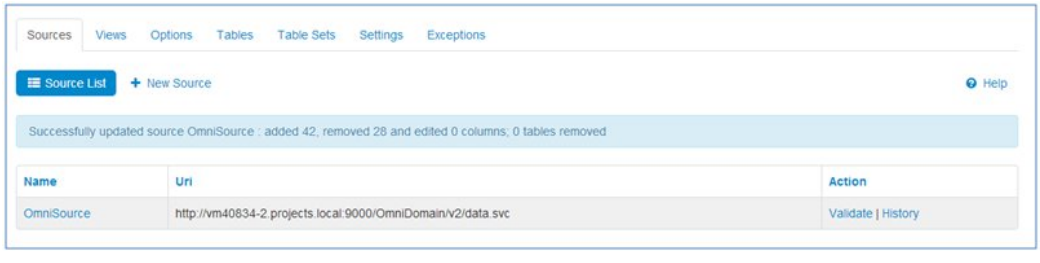


Source Validation

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



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



Source History

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

Source List New Source Help

Source Update Events

Date	Table	View	Column	Action
2014-03-26 14:53:07.12	Wf Tickets	groupedGridView	remedyRefs	edited
2014-03-26 14:53:07.069	Wf Tickets	advancedSearchView	remedyRefs	edited
2014-03-26 14:53:07.017	Wf Tickets	fullInfoView	remedyRefs	edited
2014-03-26 14:53:06.966	Wf Cases	groupedGridView	events	edited
2014-03-26 14:53:06.915	Wf Cases	groupedGridView	tickets	edited
2014-03-26 14:53:06.864	Wf Cases	groupedGridView	ssn	edited
2014-03-26 14:53:06.813	Wf Cases	manOverridePopupView	ssn	edited
2014-03-26 14:53:06.756	Wf Cases	casePropertiesView	ssn	edited
2014-03-26 14:53:06.704	Wf Cases	casesPopupView	ssn	edited
2014-03-26 14:53:06.653	Wf Cases	breadcrumbView	ssn	edited

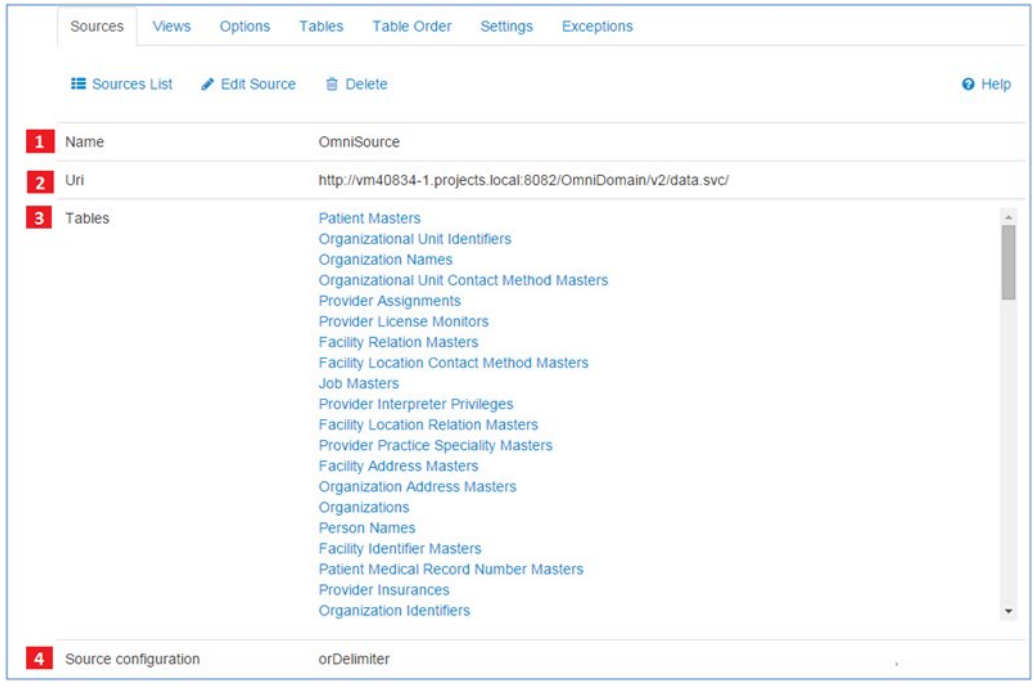
1 2 3 4 5 6 7 8 9 10 .. 439 Next

Show Source

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

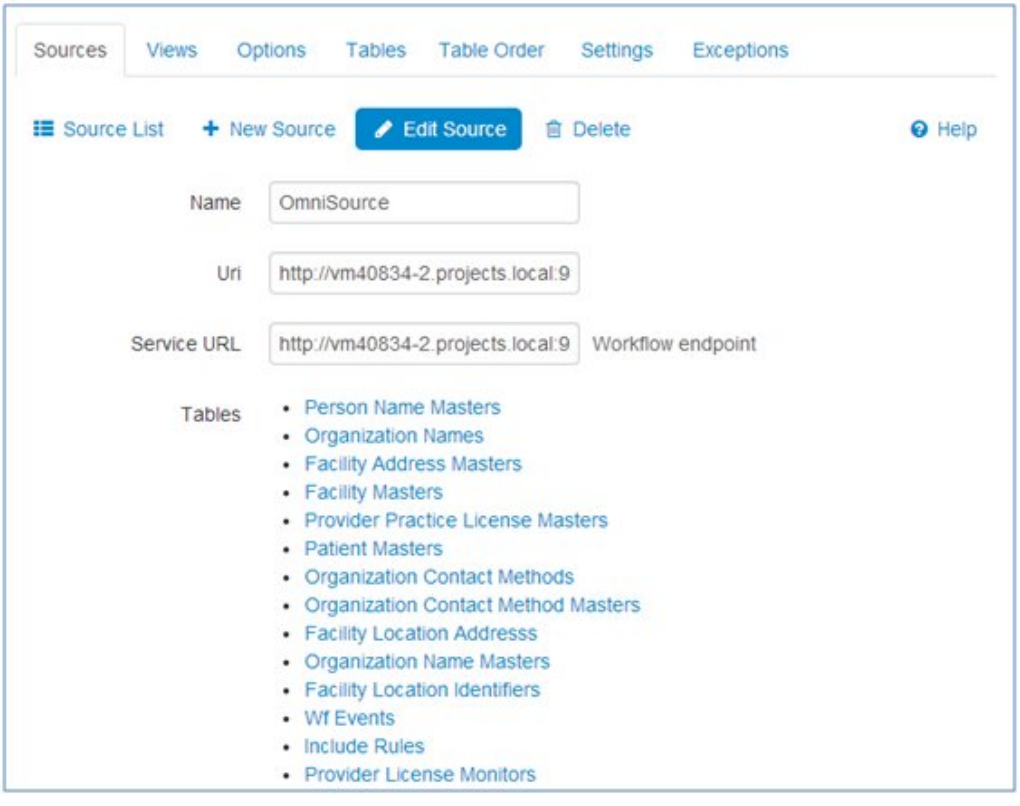
- Source name
- Uri
- Tables the source contains

❑ Source configuration



Editing a Source

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



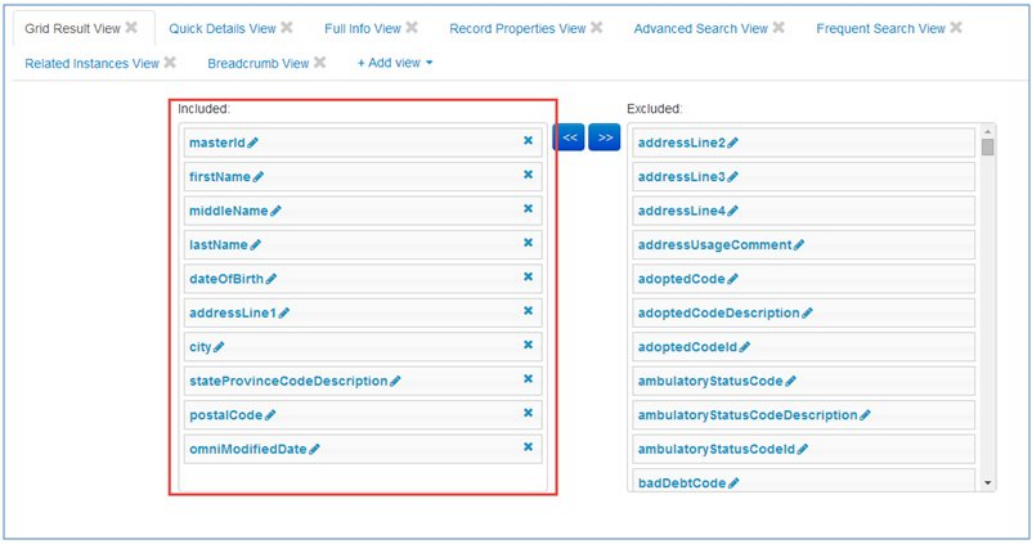
Deleting a Source

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

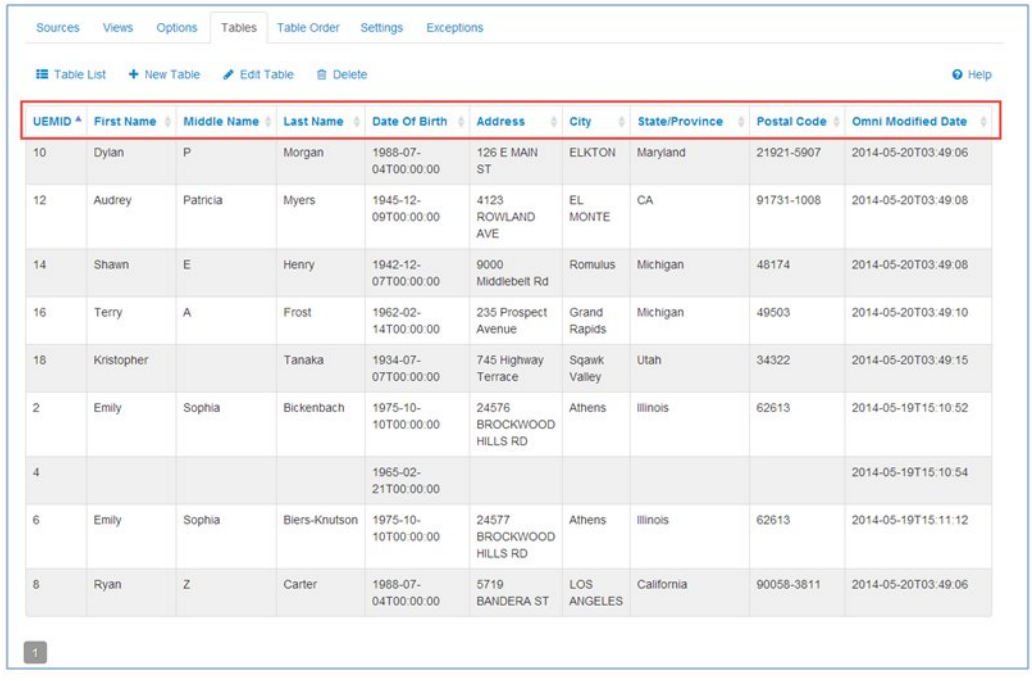
Views

In this section:

Views are used to select/group columns for display in the main interface of Omni-Patient™ Management Central (OPMC).



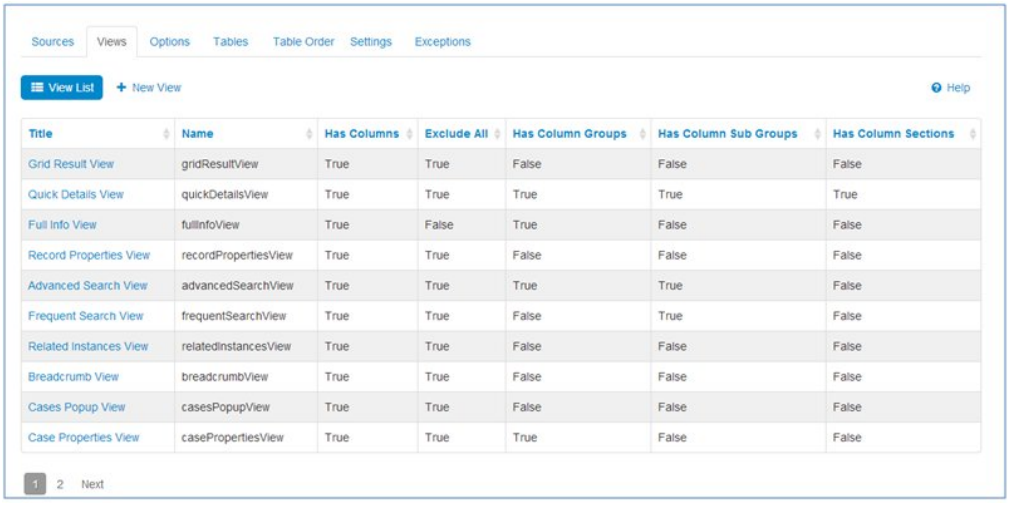
For example, the Grid Result View is used to represent the grid on the Show Table page, as shown in the following image.



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

View List

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



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

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

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

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

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

Show View

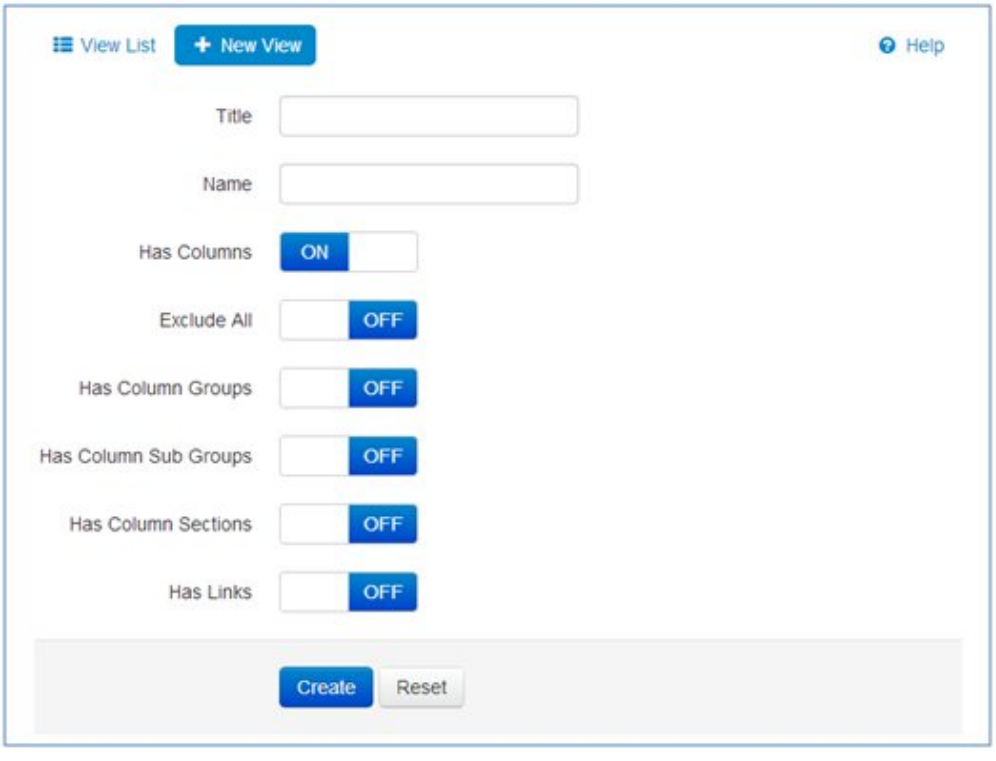
The Show View page can be reached by selecting any view from the list. It contains the following information about the selected view:

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

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

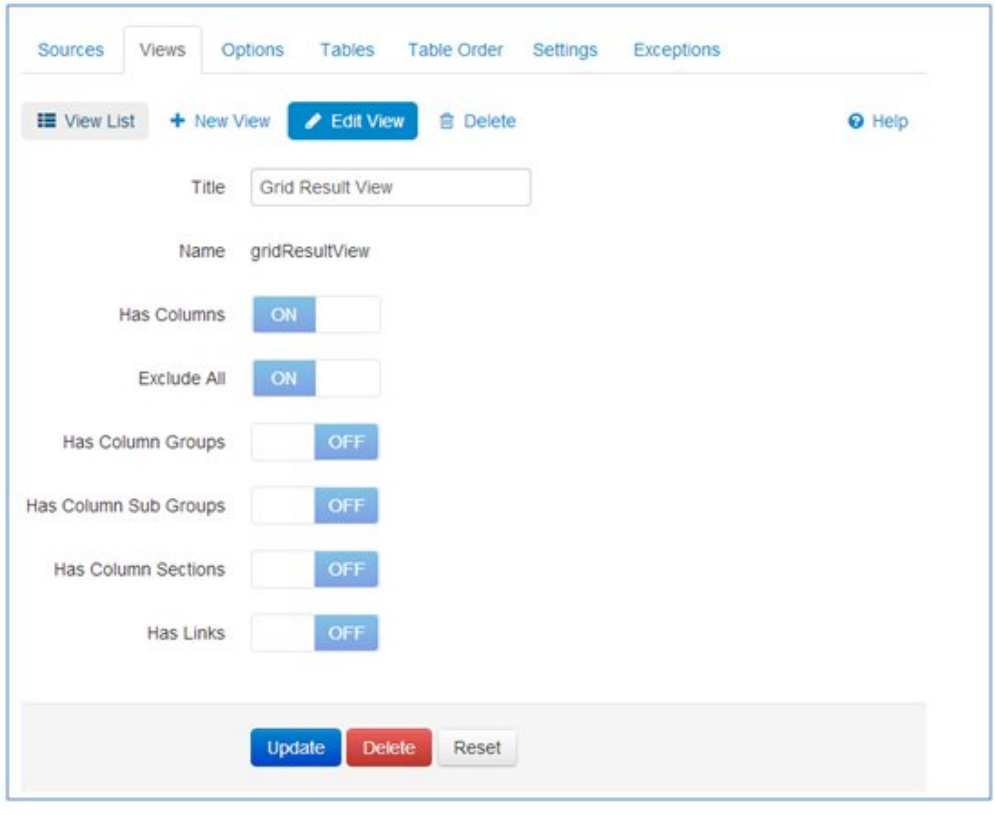
Creating a New View

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



Editing a View

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



Options

In this section:

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

- Configure a name for single table record.
- Show or hide Info tabs.
- Switch logging on or off.
- Define a title for Default Filters.
- Adding of multiselect switchers to My/All Filter cases.

Option List

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

Sources Views Options Tables Table Order Settings Exceptions

Options List + New Option Help

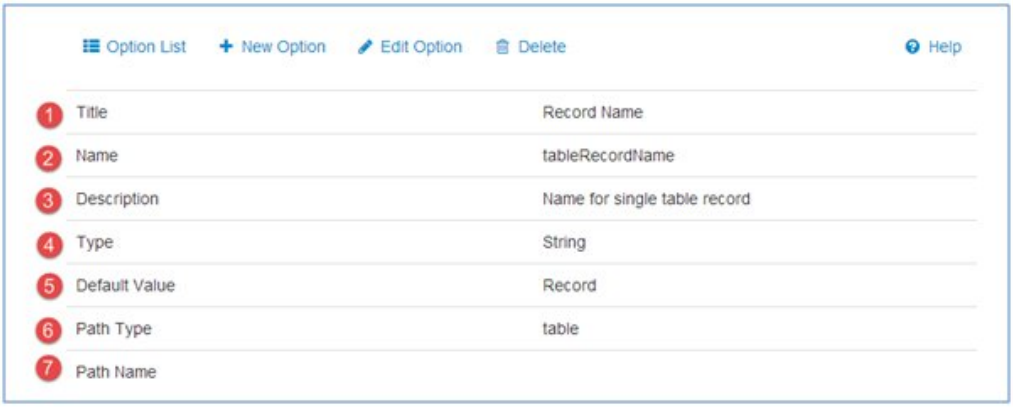
Title	Name	Description	Type	Default Value	Path Type	Path Name
Record Name	tableRecordName	Name for single table record	String	Record	table	
Info Tab Indicator	isInfoTab	Indicates whether a table is an information kind of tab	Boolean	false	table	
Is Logged	IsLogged	Log events from this table	Boolean	true	table	
DefaultFilterStateMyCases	DefaultFilterStateMyCases	DefaultFilterStateMyCases	String		view	myCasesFilterView
DefaultFilterStateAllCases	DefaultFilterStateAllCases	DefaultFilterStateAllCases	String		view	allCasesFilterView
SwitcherValuesStateAllCases	SwitcherValuesStateAllCases	adds possibility using of multiselect switchers for configuring of filtering items on All Cases	String		view	allCasesFilterView
SwitcherValuesStateMyCases	SwitcherValuesStateMyCases	adds possibility using of multiselect switchers for configuring of filtering items on My cases	String		view	myCasesFilterView

Show Option

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

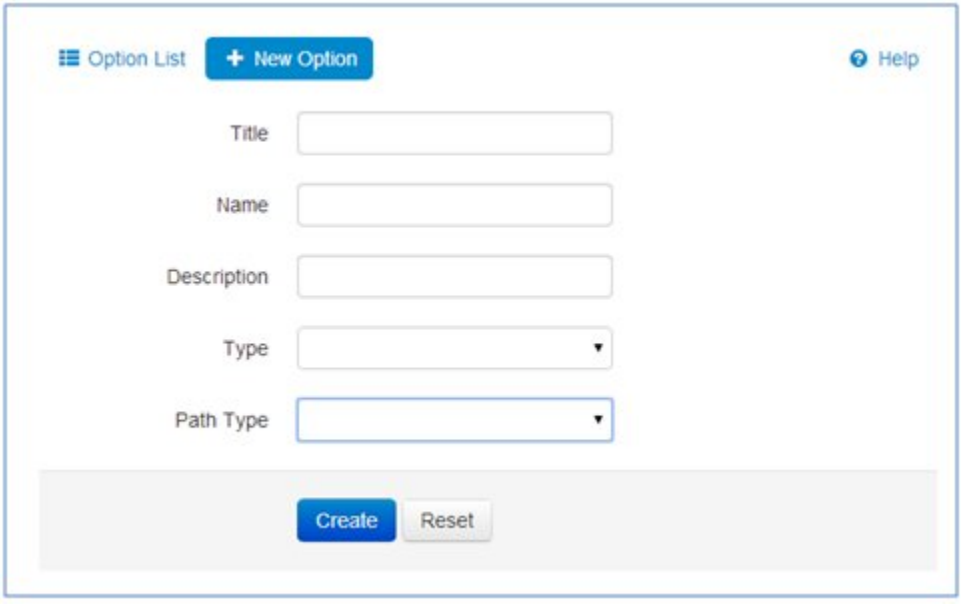
- Option title
- Option name
- Option description
- Option type
- Option default type
- Type of component

- Name of view (if required)



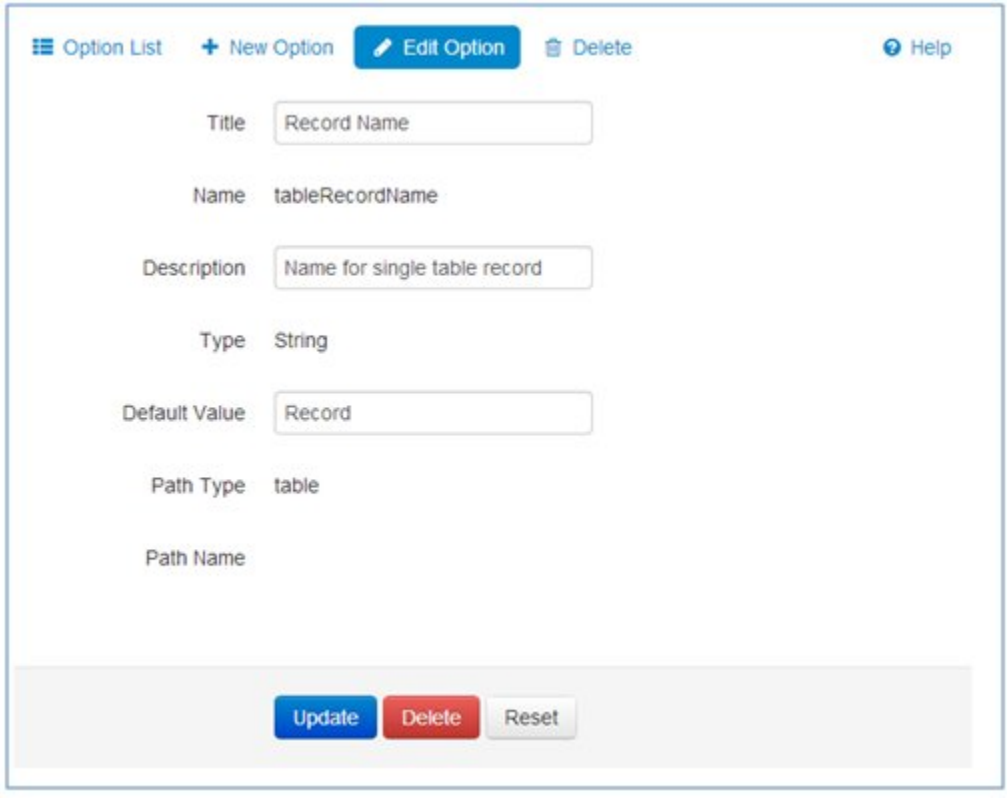
Creating a New Option

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



Editing an Option

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



Note that the Name and Type fields cannot be modified.

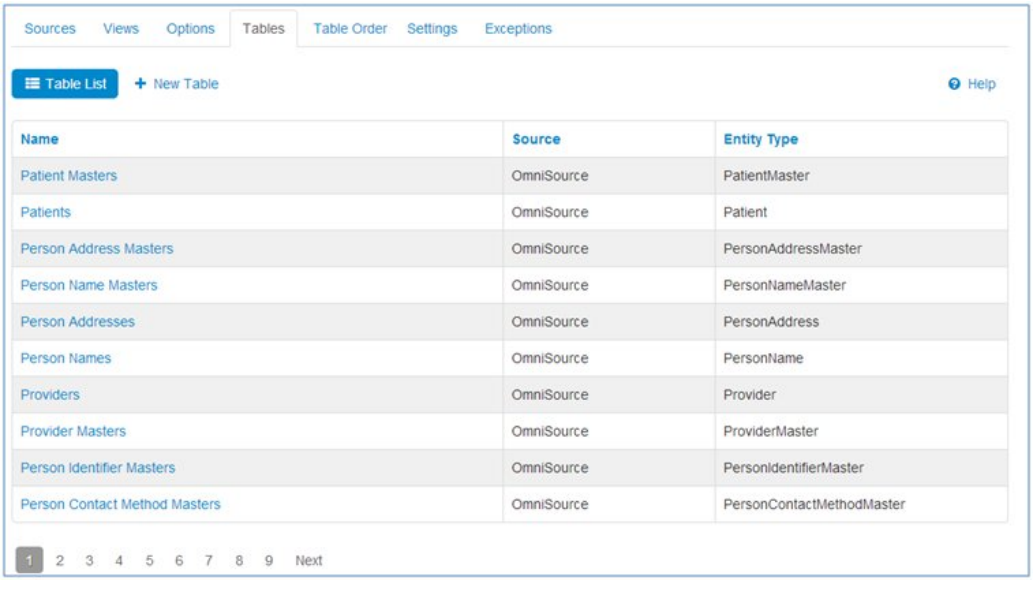
Tables

In this section:

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

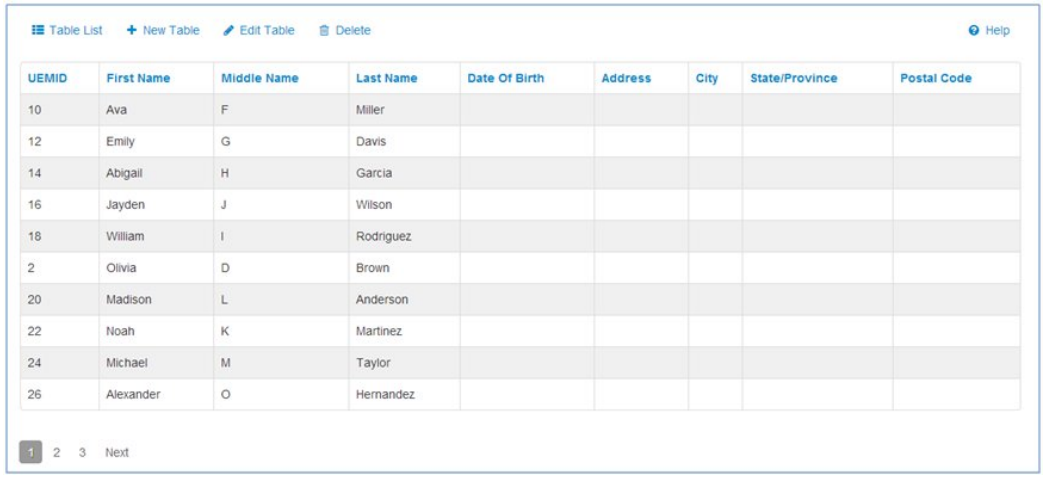
Table List

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



Show Table

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



UEMID	First Name	Middle Name	Last Name	Date Of Birth	Address	City	State/Province	Postal Code
10	Ava	F	Miller					
12	Emily	G	Davis					
14	Abigail	H	Garcia					
16	Jayden	J	Wilson					
18	William	I	Rodriguez					
2	Olivia	D	Brown					
20	Madison	L	Anderson					
22	Noah	K	Martinez					
24	Michael	M	Taylor					
26	Alexander	O	Hernandez					

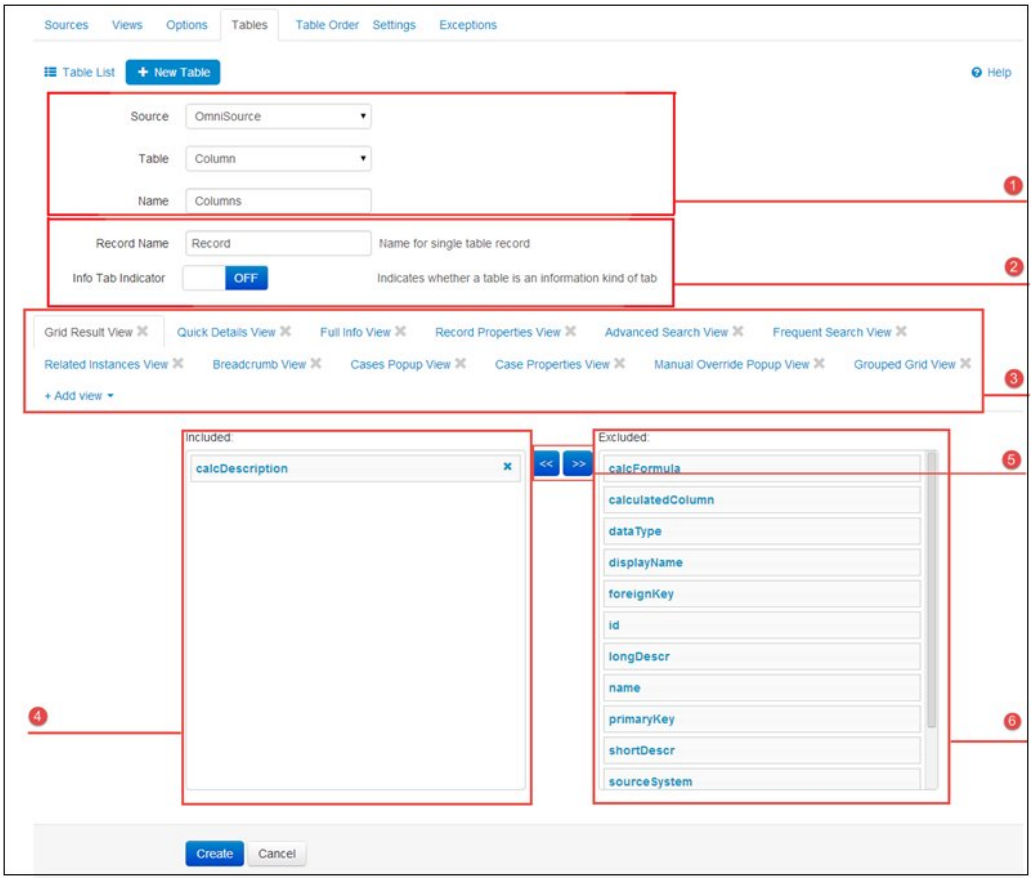
Creating a New Table

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

The New Table page contains the following sections:

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

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



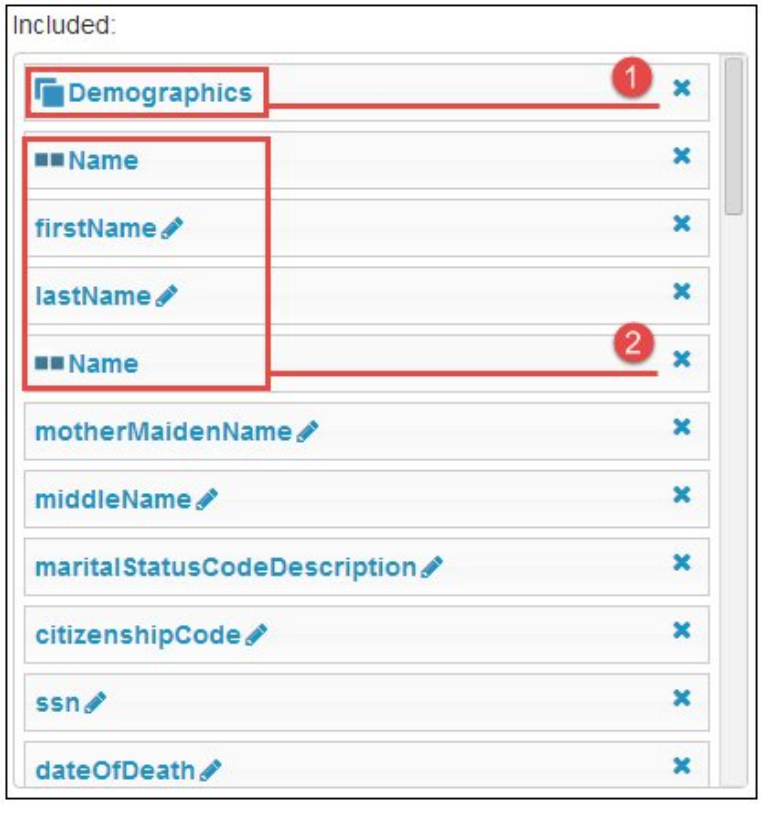
Some views have groups/sub-groups/sections. To create a new group/sub-group/section, administrators should choose the appropriate value from the drop-down list (if the view allows having groups/sub-groups/sections), type the name, and then press *Enter*.

Groups allow administrators to unite columns.

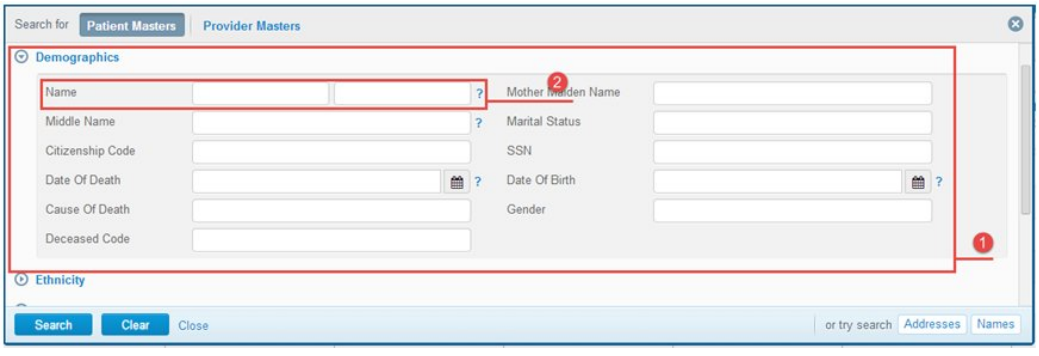
Sub-group is used to display a key-value pair, which is why a sub-group must contain two columns.

A section is an additional grouping in the group.

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

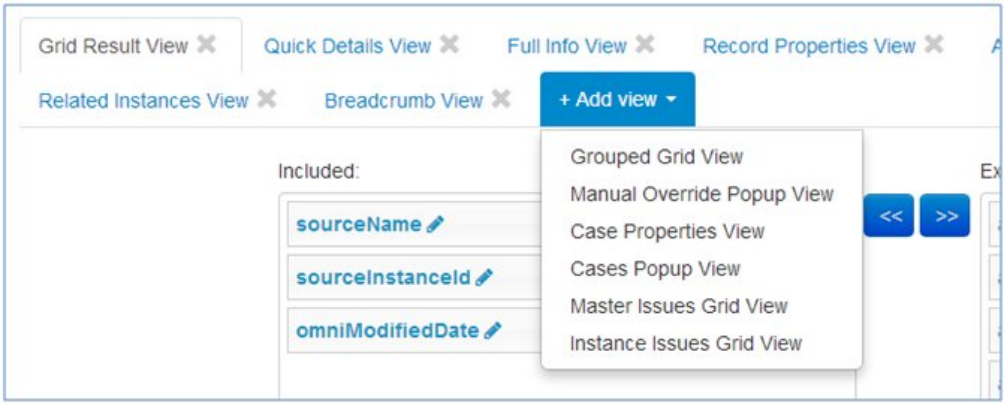


The following image shows the Advanced Search dialog.



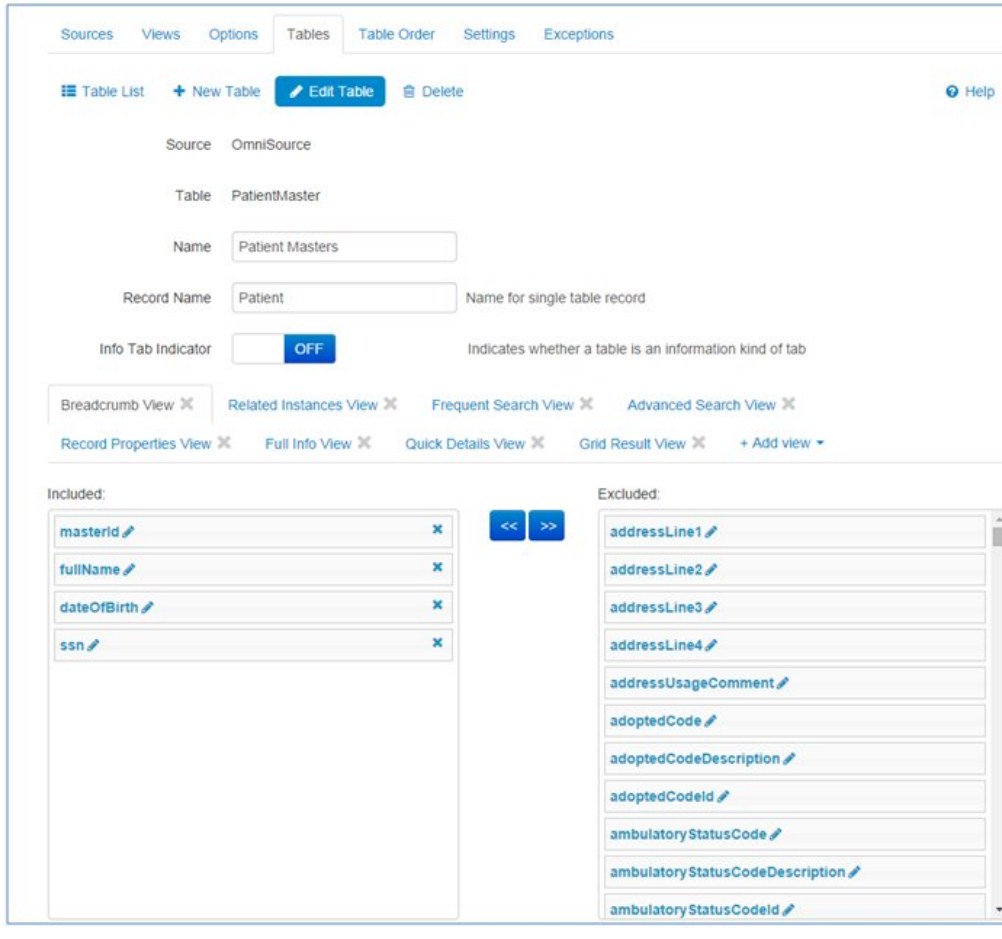
Created items are validated before they are updated to the table. Sub-group tags must contain two columns. In addition, the Grid Result View must have at least one column included. If validation fails, an appropriate message is displayed and the table is not updated.

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

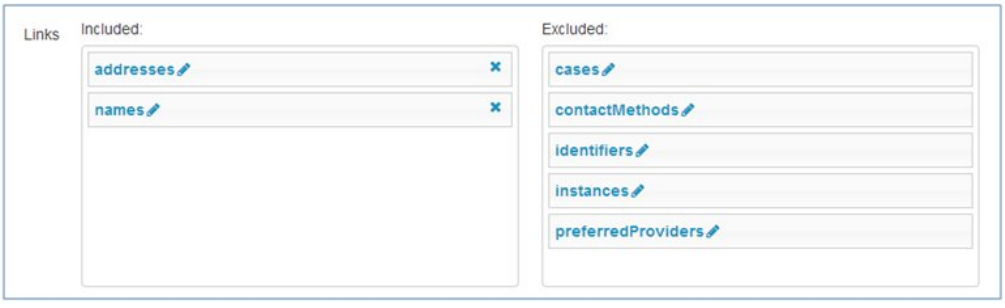


Editing a Table

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



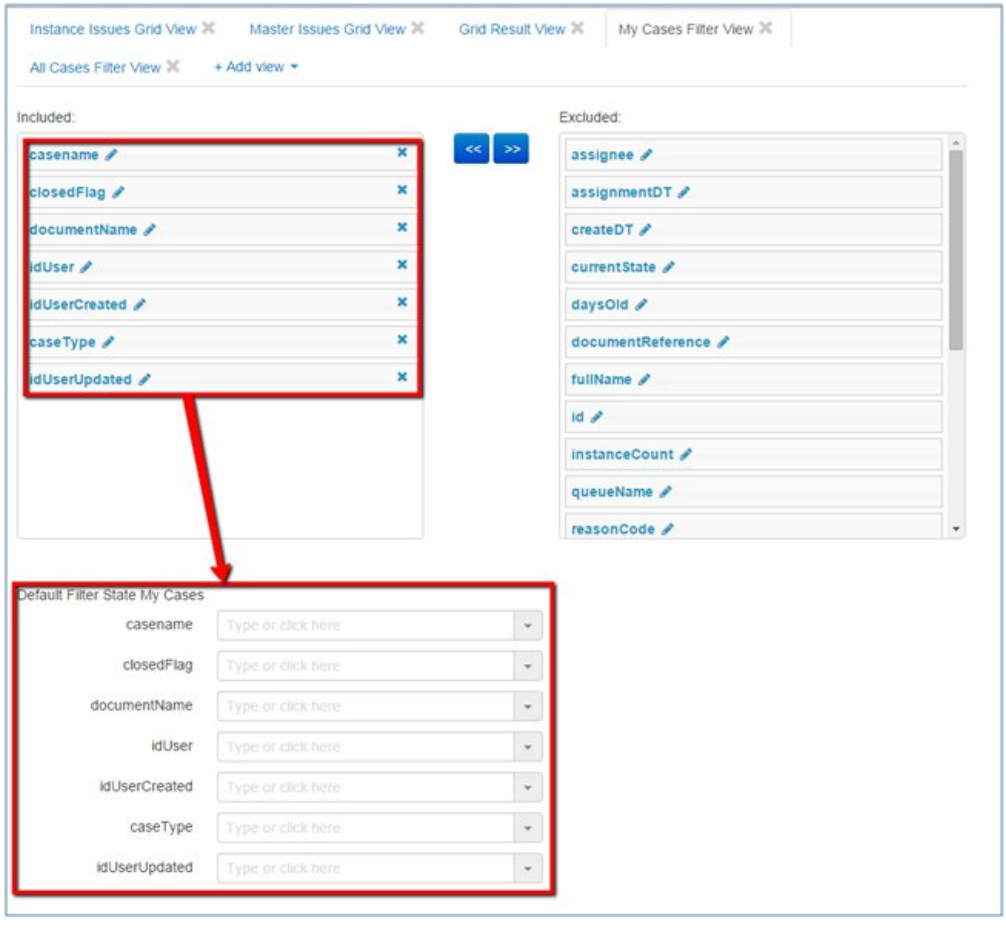
Some views have links. The Links section is displayed after the Columns section.



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

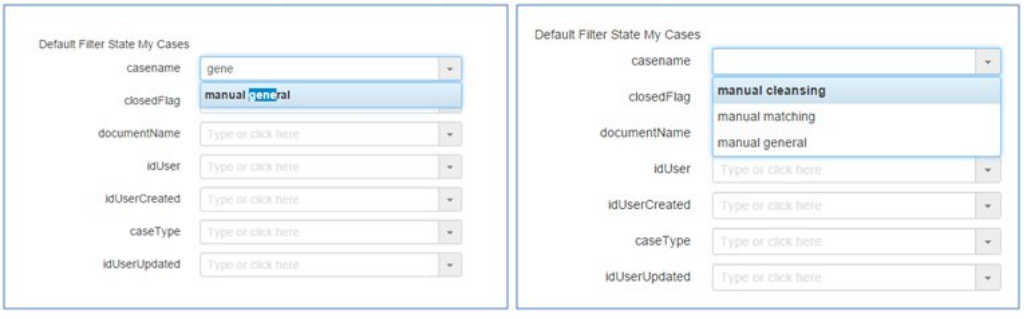
When new options for a View are created, they are displayed on the corresponding View tab after the Columns and Links sections.

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

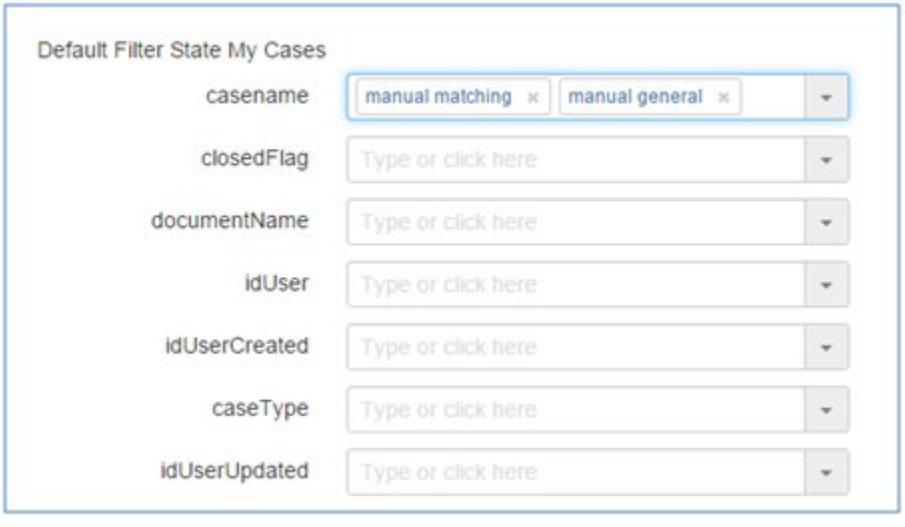


Columns that are placed in the Included section of the My/All cases filter view are displayed in the Default Filtering section as well. If a column is moved to the Excluded section, the column will automatically disappear from the Default Filtering section.

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



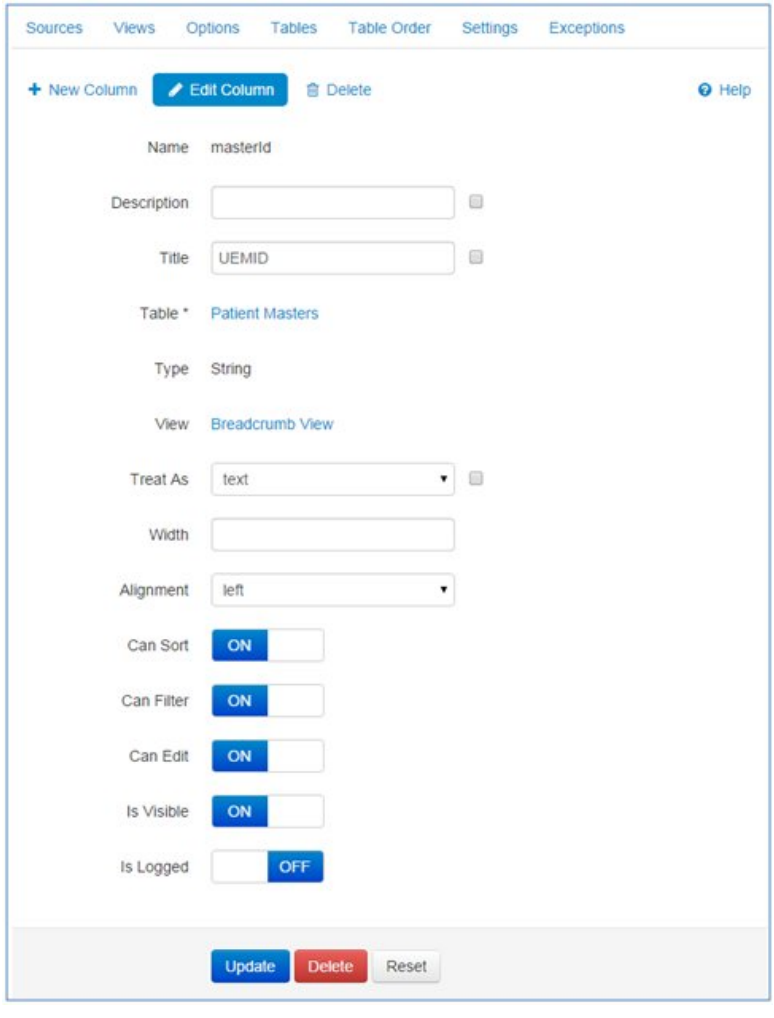
More than one value can be selected for one field if required.



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

Editing a Column

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

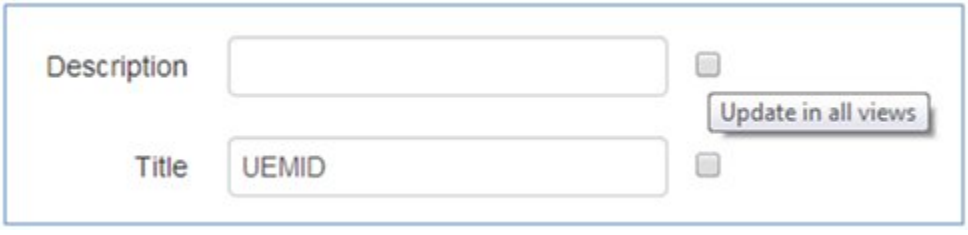


Several fields, such as Name, Table, Type, and View are not available for editing. The Table and View fields are hyperlinks to corresponding items.

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

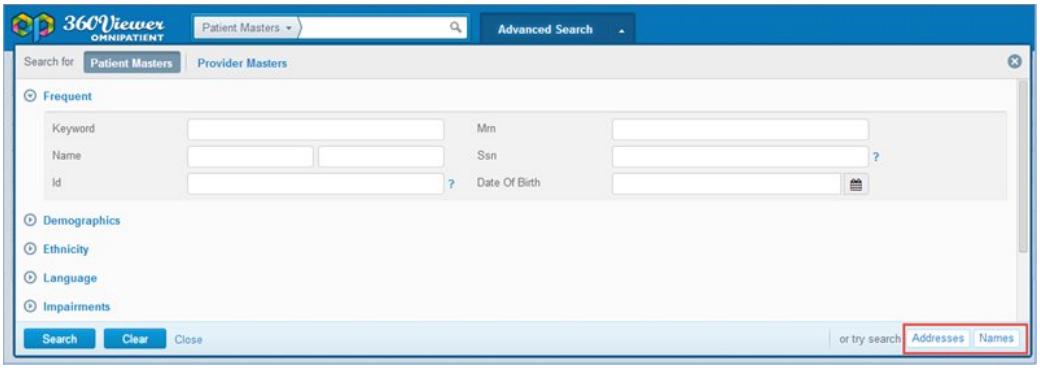
Global Column Editing

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

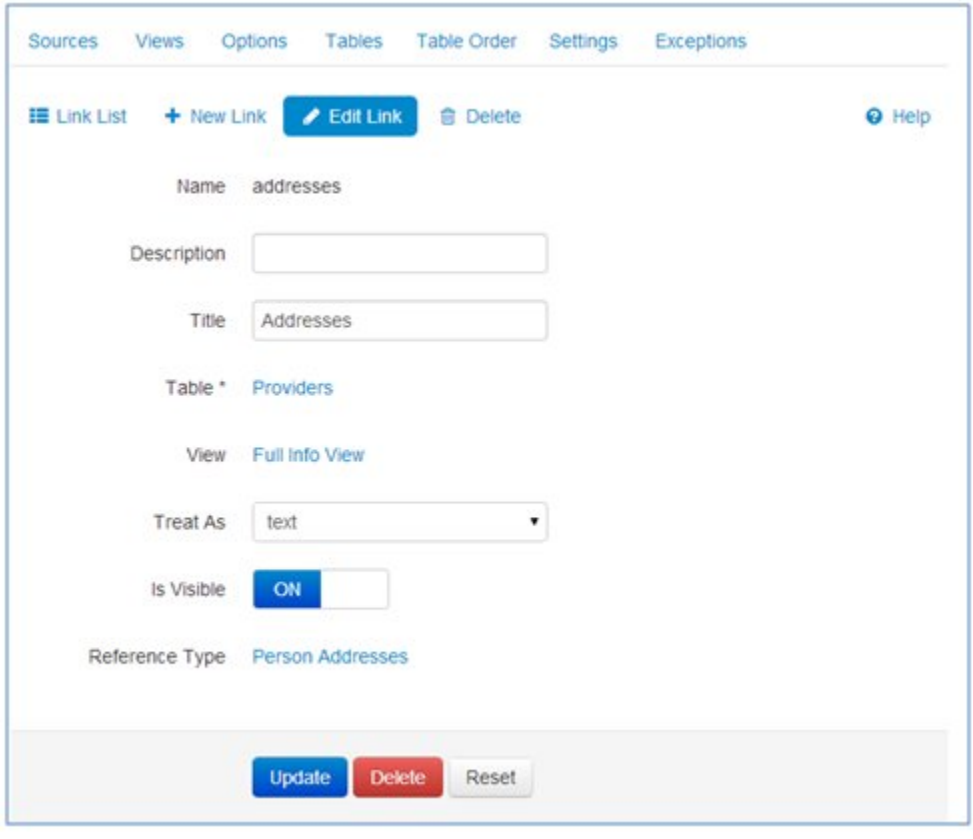


Editing a Link

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



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



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

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

Table Order

In this section:

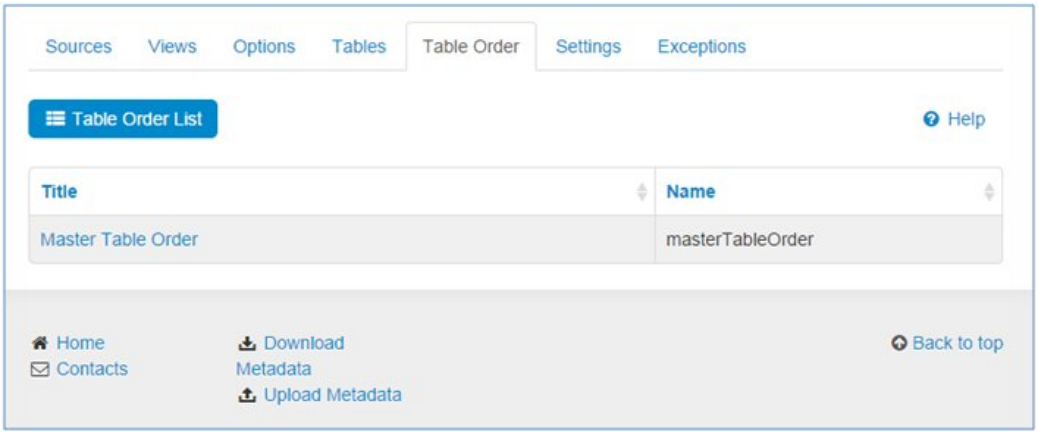
Table Order List

Editing a Table Order

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

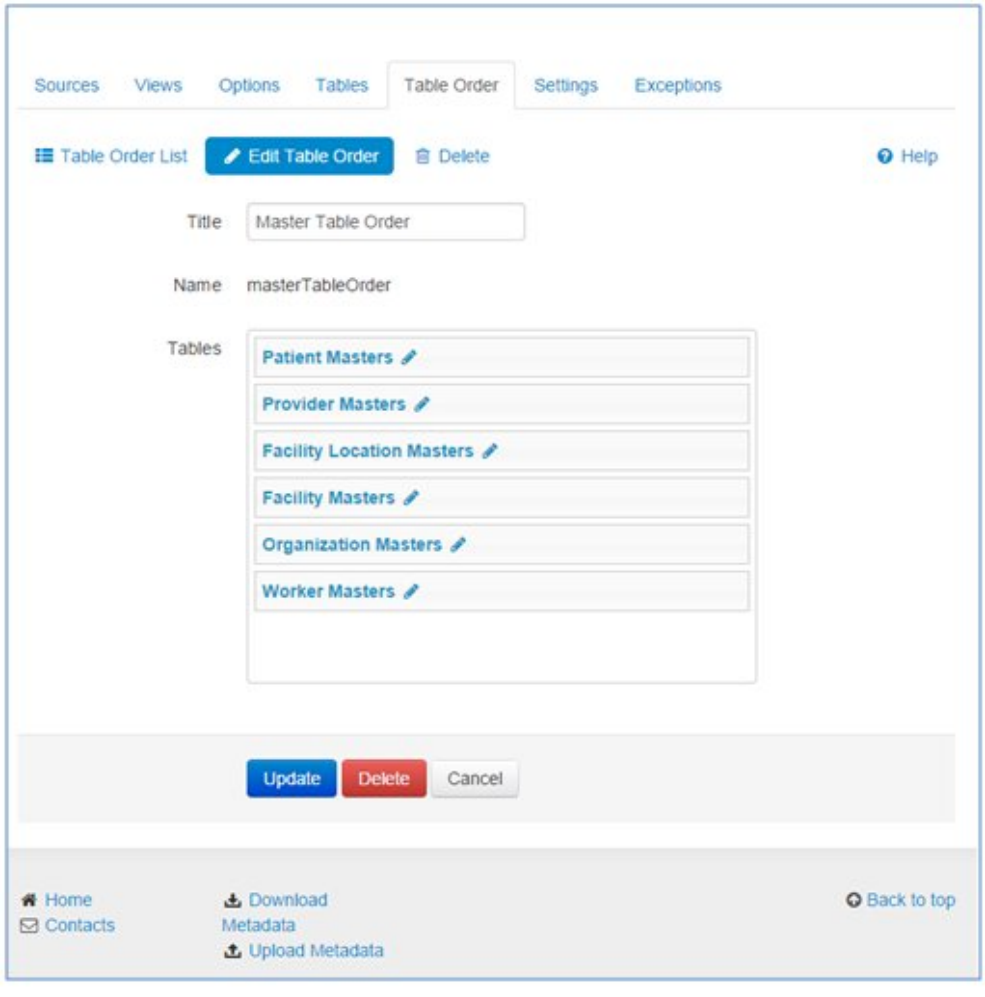
Table Order List

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



Editing a Table Order

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



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

Settings

In this section:

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

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

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

Setting List

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

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

Settings List | + New Setting | Help

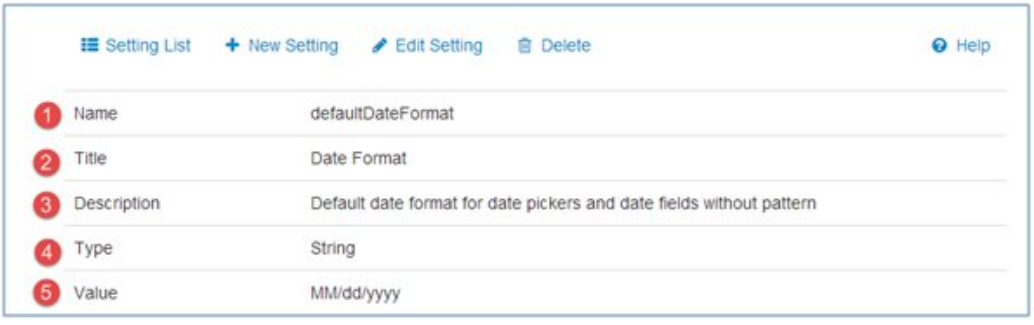
Name	Title	Description	Type	Value
trackJsErrors	Track JavaScript Errors	Track JavaScript Errors	Boolean	true
defaultDateTimeFormat	Date Time Format	Default date time format for that is used for custom date properties that do not belong to any view (e.g. activity dates for cases)	String	yyyy-MM-dd hh:mm:ss a
showPopupWithCopyButton	Show Popup With Copy Button	Show pop ups with copy button in domain view table when hovering records	Boolean	false
showActionIcons	Show Action Icons	Show icons in domain view table for actions	Boolean	true
defaultDateFormat	Date Format	Default date format for date pickers and date fields without pattern	String	MM/dd/yyyy
loadRecordsByDefault	Load records by default	Load records by default on home page, or after searching only	Boolean	false
issuePageTablesCount	Default grid number	The number of grids expanded by default on issue search page.	Numeric	3
issueFiterSectionsCount	Issue Fiter Sections Count	Issue Fiter Sections Count	Numeric	1
loggingELK	Enable ELK logging	Enable ELK logging	Boolean	false
proxyUrl	Proxy Url	Proxy Url	String	http://omnipat1.ibi.com:8080

Show Setting

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

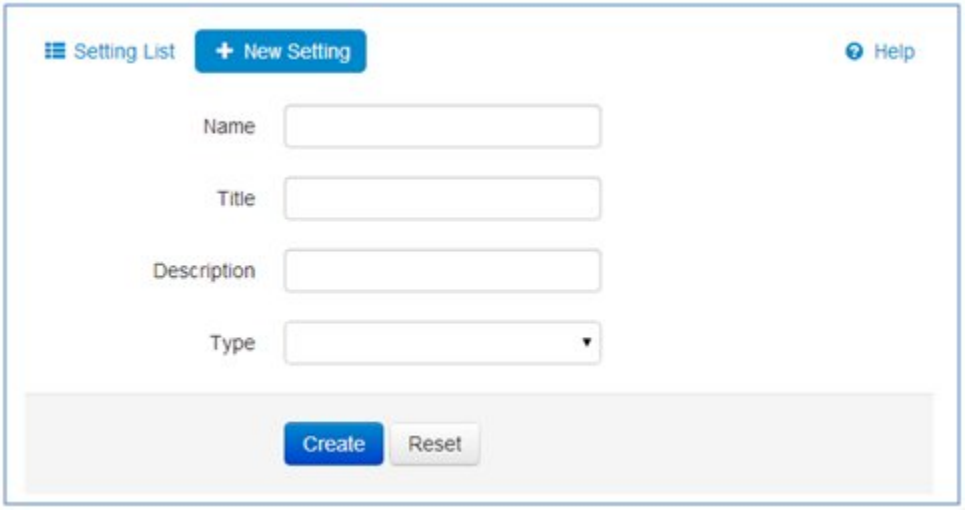
- Setting name
- Setting title
- Setting description
- Setting type

- Setting value



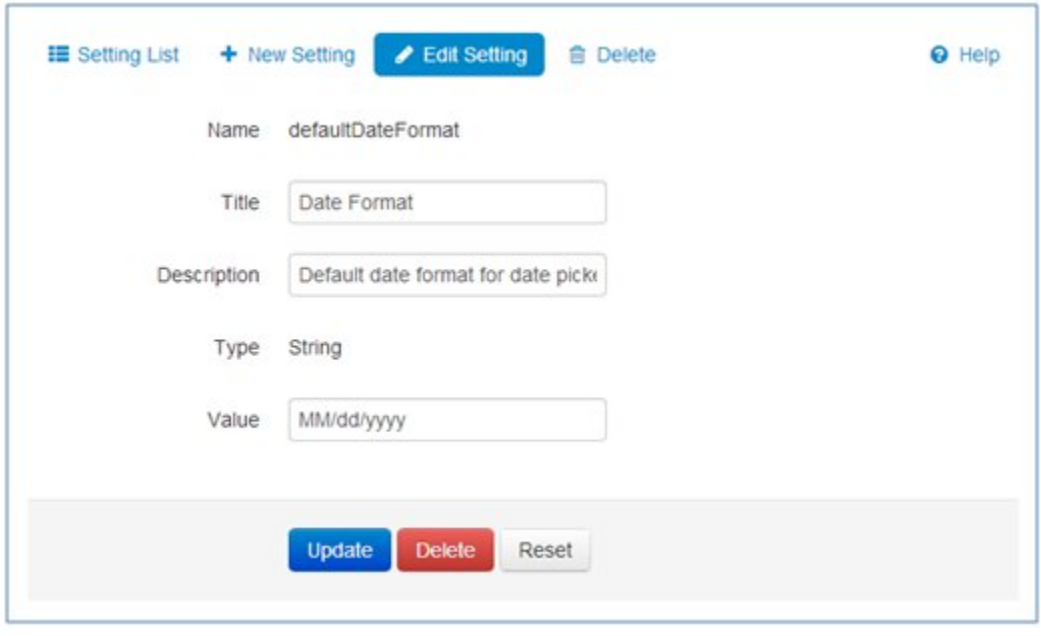
Creating a New Setting

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



Editing a Setting

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



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

Exceptions

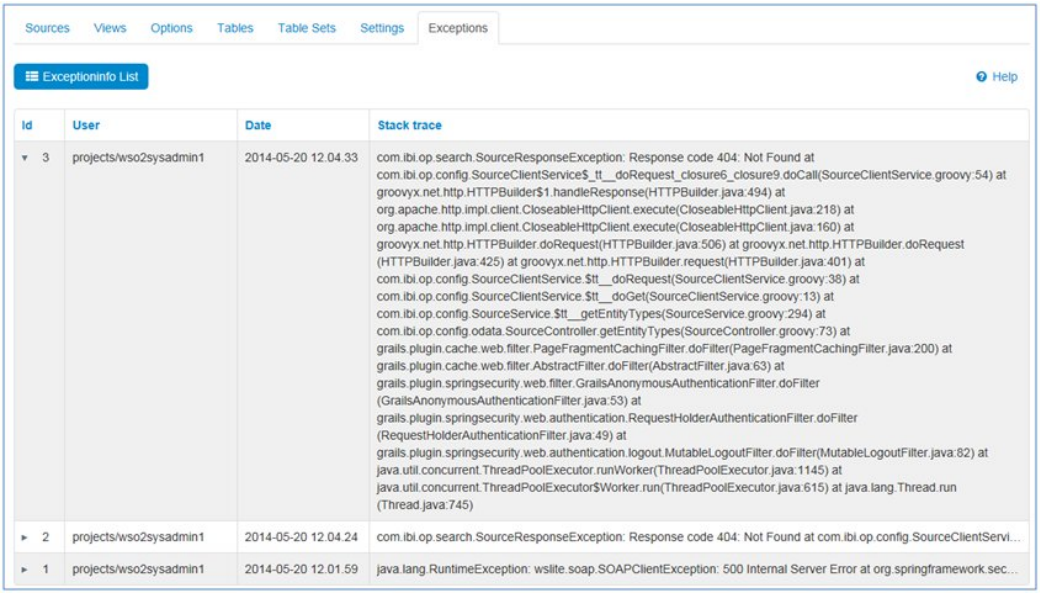
In this section:

Exception List

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

Exception List

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



Downloading and Uploading Metadata

In this section:

Downloading Metadata

Uploading Metadata

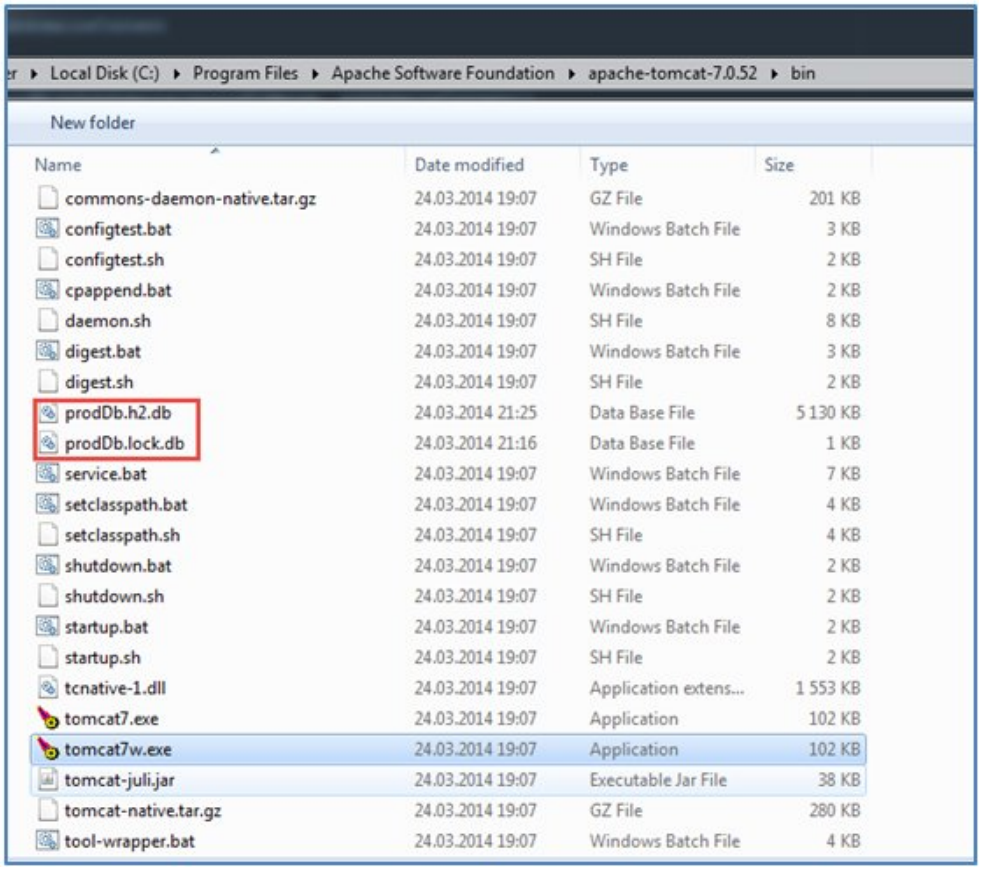
This section describes how to download and upload metadata.

Downloading Metadata

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

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

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



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

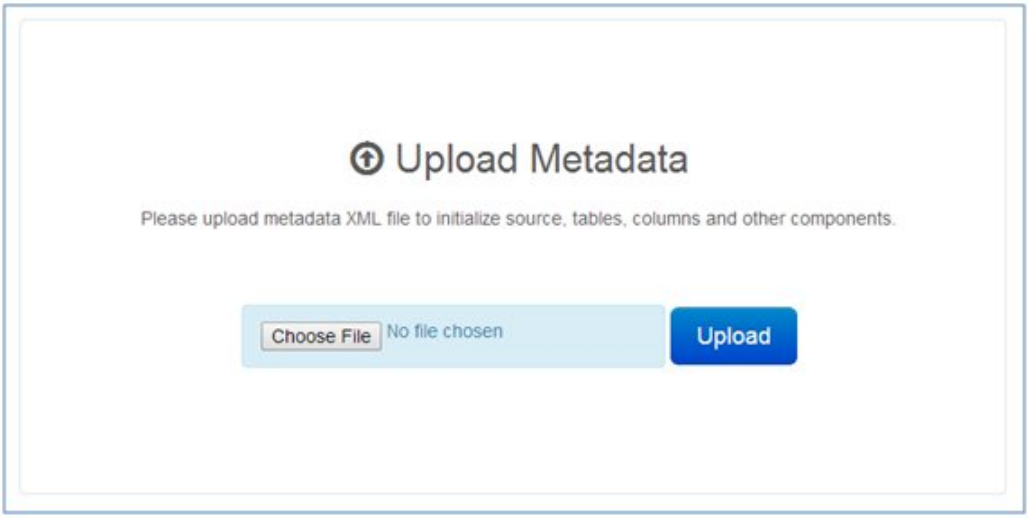
Administrators can download the runtime database of metadata stored as prodDB.h2.db (as shown in the above image) and convert it into a readable metadata XML file by clicking the *Download Metadata* link.

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

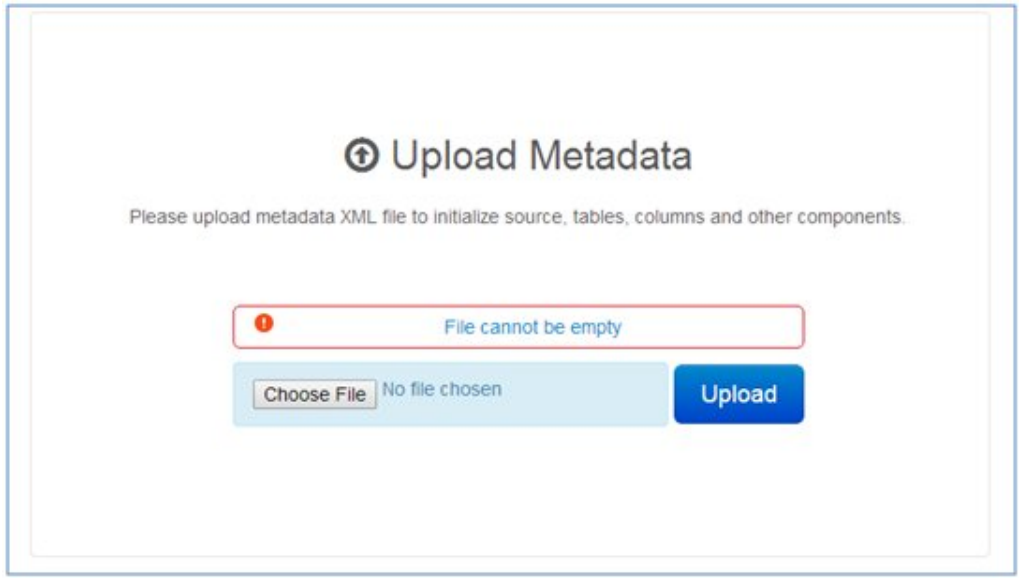
Uploading Metadata

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

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

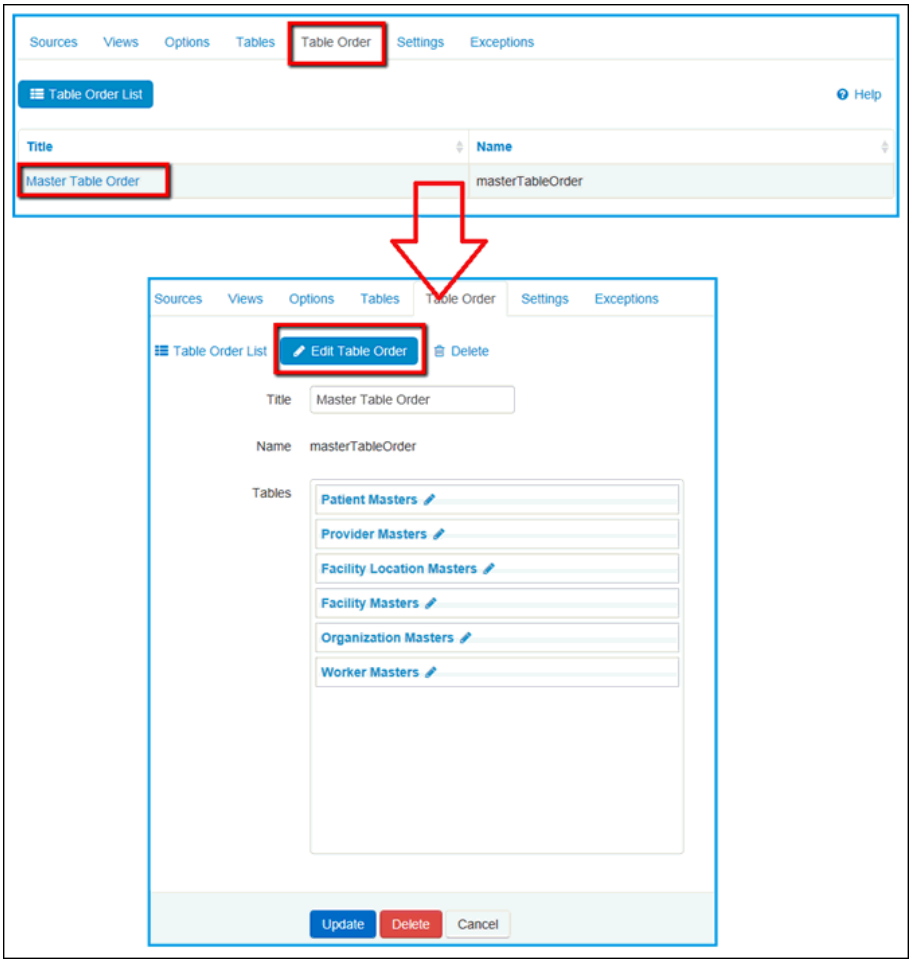


Before uploading, the file is validated to ensure that the format is correct. If the format is incorrect or thee file is empty, an error message appears, as shown in the following image.



Configuring 360 Viewer

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



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

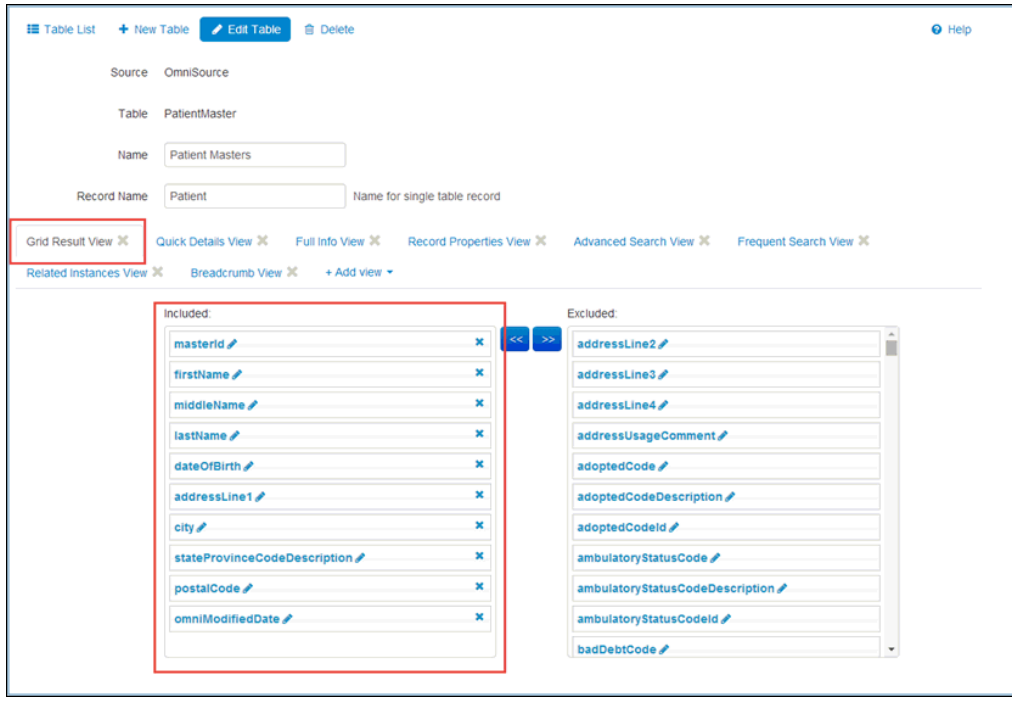
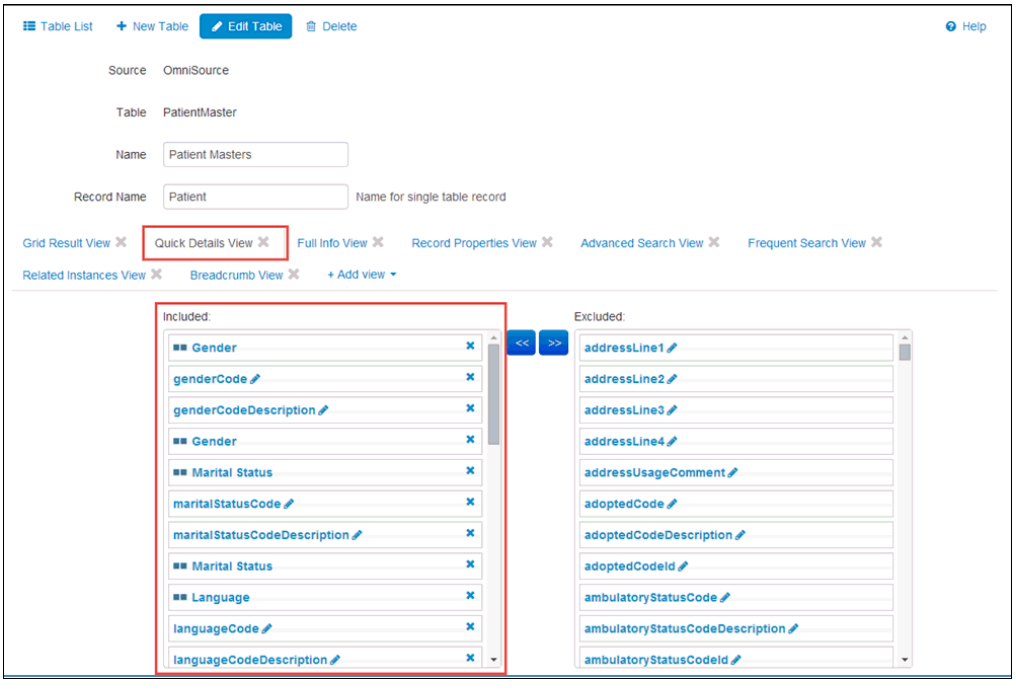
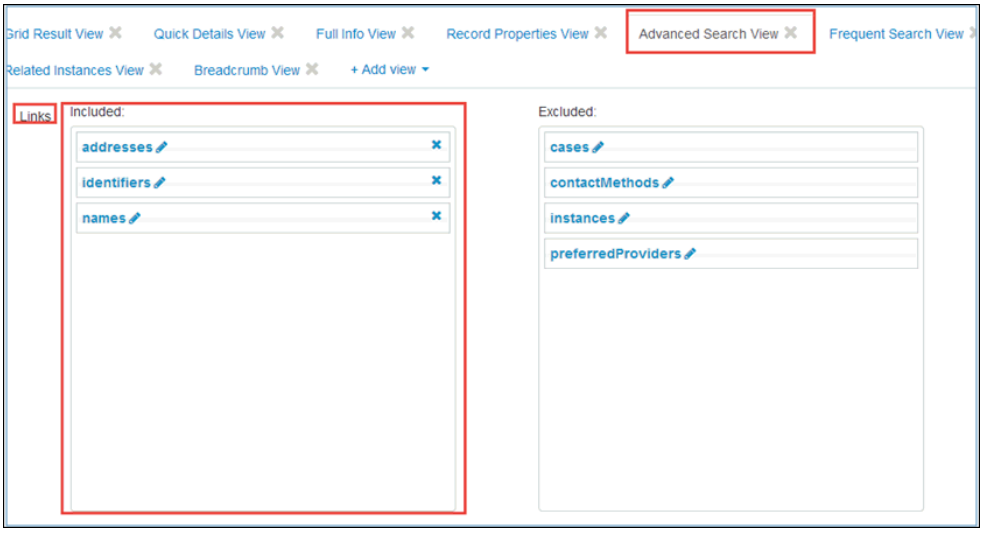


Table List
New Table
Edit Table
Delete
Help
Source
OmniSource
Table
PatientMaster
Name
Patient Masters
Record Name
Patient
Name for single table record
Grid Result View
Quick Details View
Full Info View
Record Properties View
Advanced Search View
Frequent Search View
Related Instances View
Breadcrumb View
+ Add view
Included:
masterId
firstName
middleName
lastName
dateOfBirth
addressLine1
city
stateProvinceCodeDescription
postalCode
omniModifiedDate
<<
>>
Excluded:
addressLine2
addressLine3
addressLine4
addressUsageComment
adoptedCode
adoptedCodeDescription
adoptedCodeId
ambulatoryStatusCode
ambulatoryStatusCodeDescription
ambulatoryStatusCodeId
badDebtCode

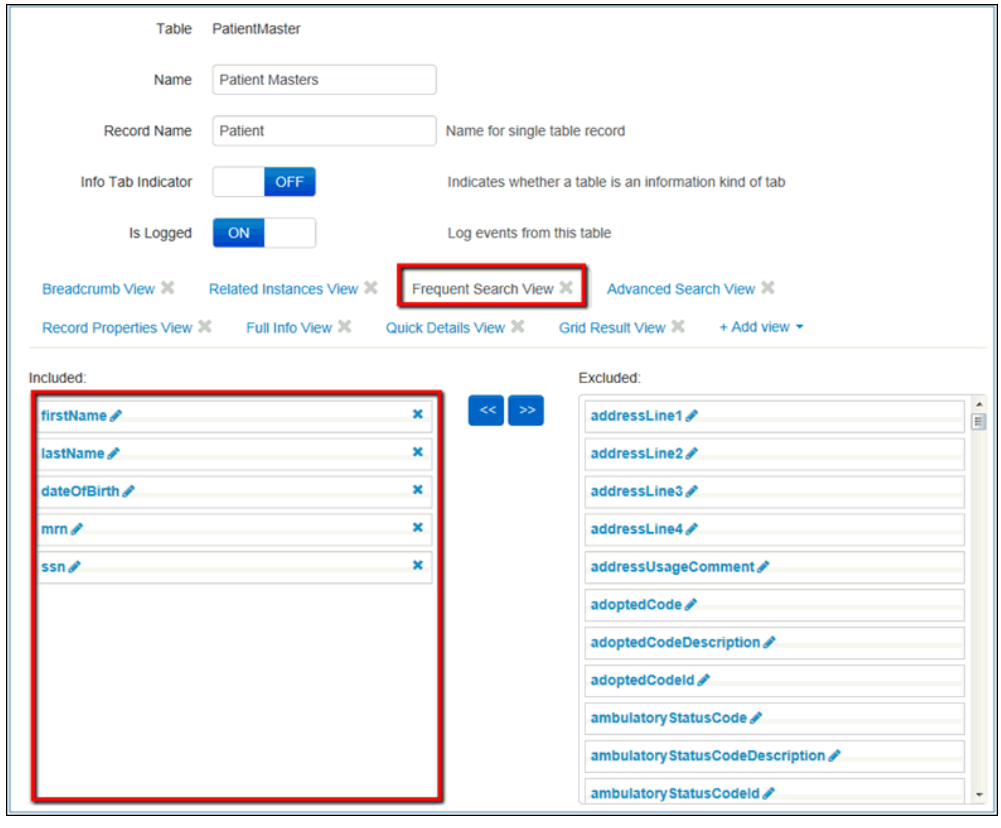
To configure columns for record details, edit the appropriate table and include or exclude the necessary columns in the Quick Details View.



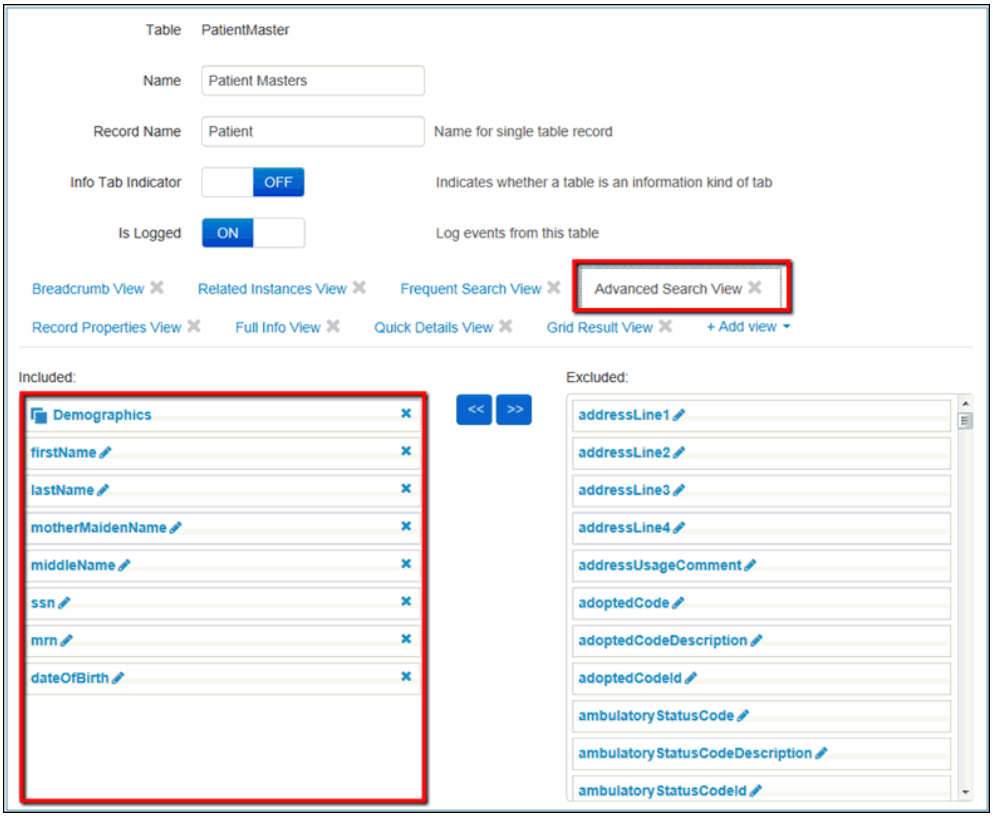
To configure subdomain links for advanced search panels, include or exclude the necessary links in the Advanced Search View tab for the corresponding domain table.



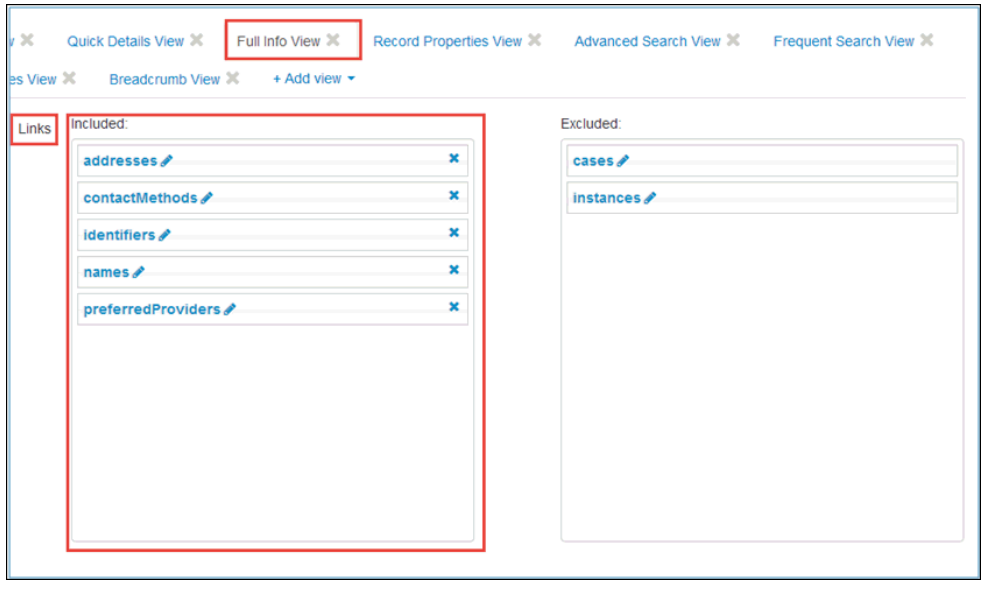
To configure fields in the Frequent Search View, include or exclude the necessary columns, as shown in the following image.



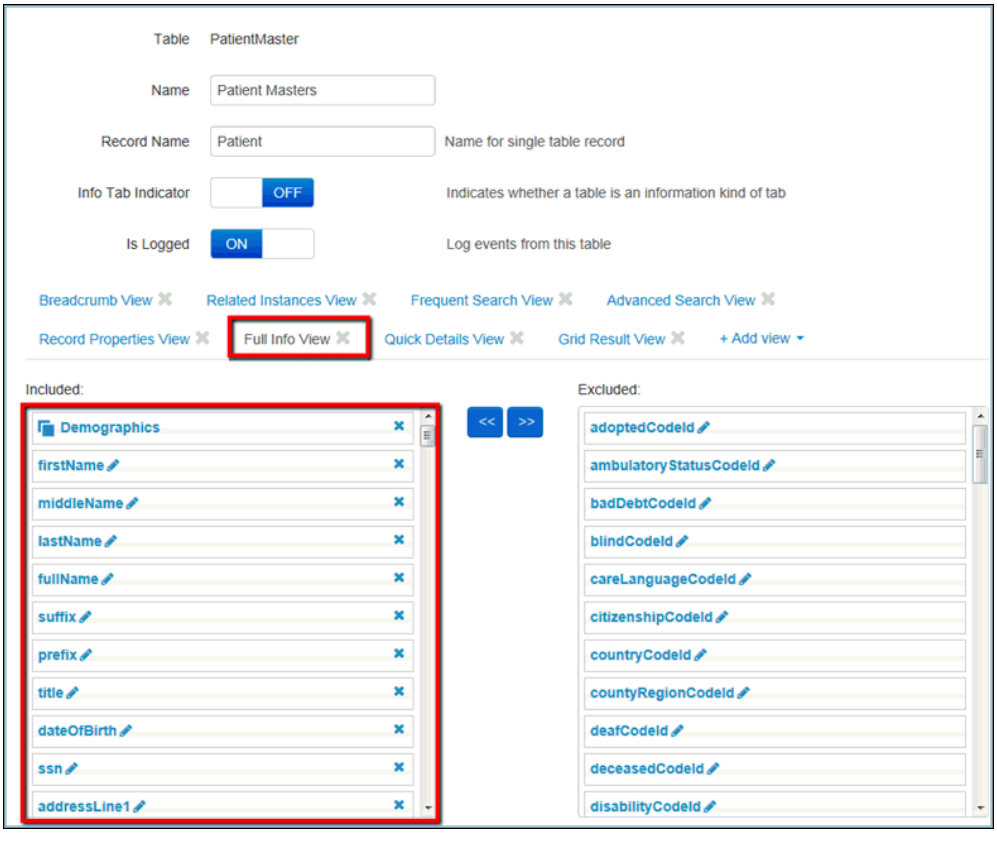
To configure all Advanced Search sections (except Frequent section) and their attributes, include or exclude the necessary columns in the Advanced Search View, as shown in the following image.



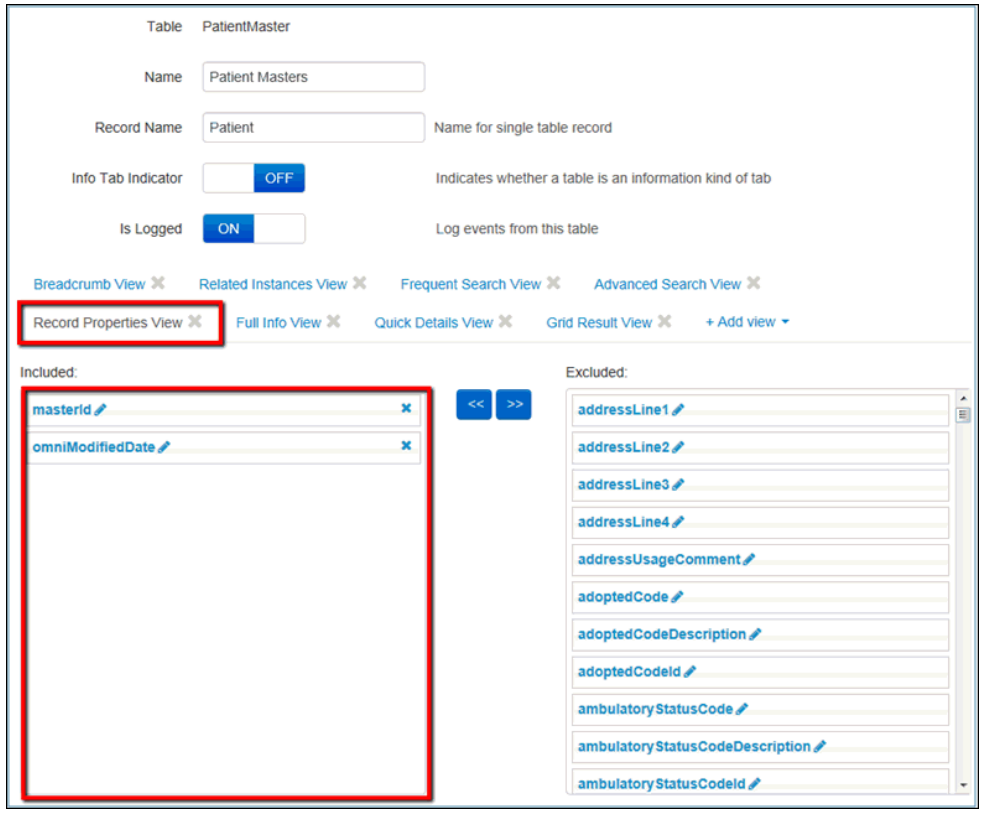
To configure subdomains for Details 360 and Master Comparison pages, edit the Master table and include or exclude the necessary links in the Full Info View tab, as shown in the following image.



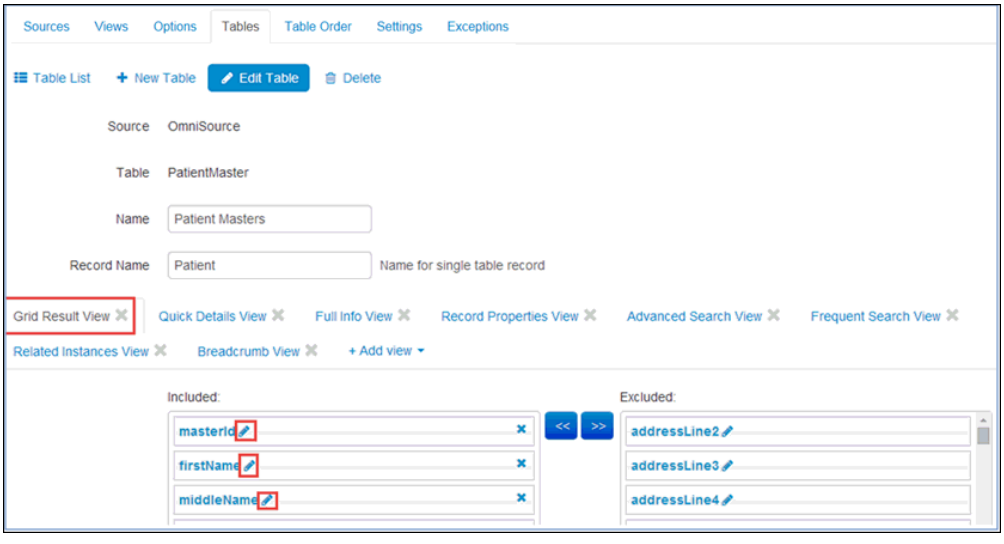
In the Full Info View tab, you can configure sections and their attributes for Domain or Subdomain (for example, Details 360, Master Comparison, and Compare Source pages) by including or excluding the necessary columns, as shown in the following image.



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

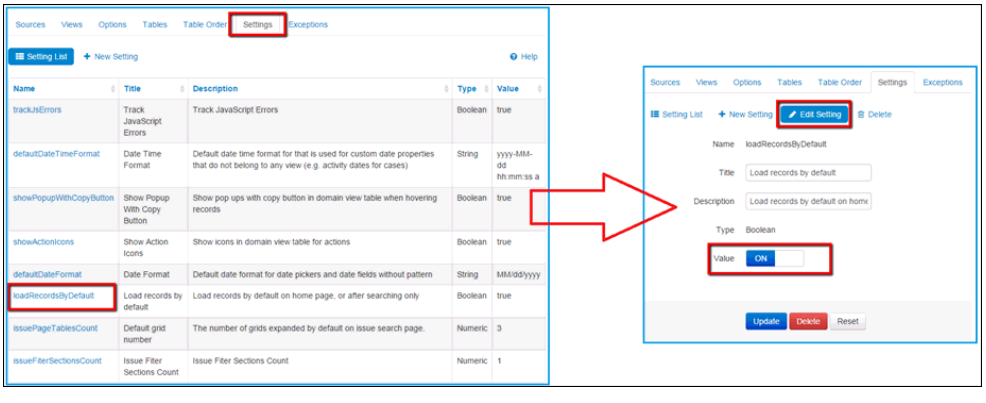


To configure the size, alignment of columns, and the columns to be sorted and filtered, click the pencil icon (Edit) in Grid Result View, as shown in the following image.



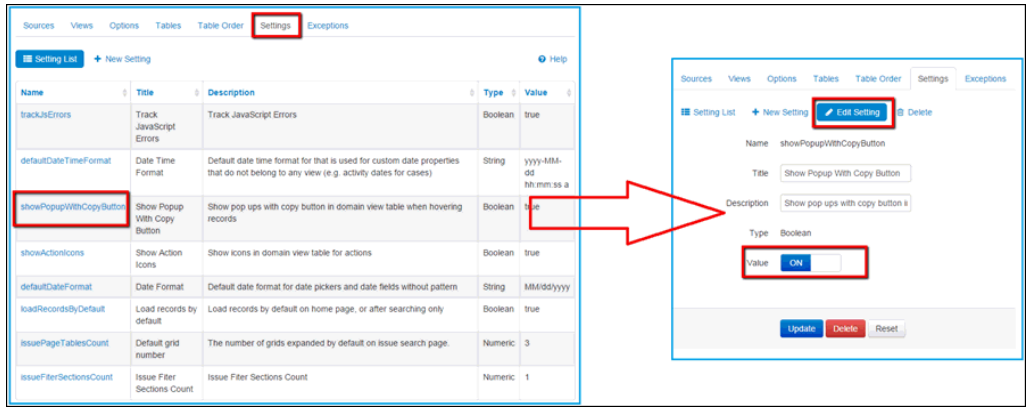
To select the default state of the Home Page, click the Settings tab, select the *Load records by default* setting from the list, and then edit the parameters accordingly.

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



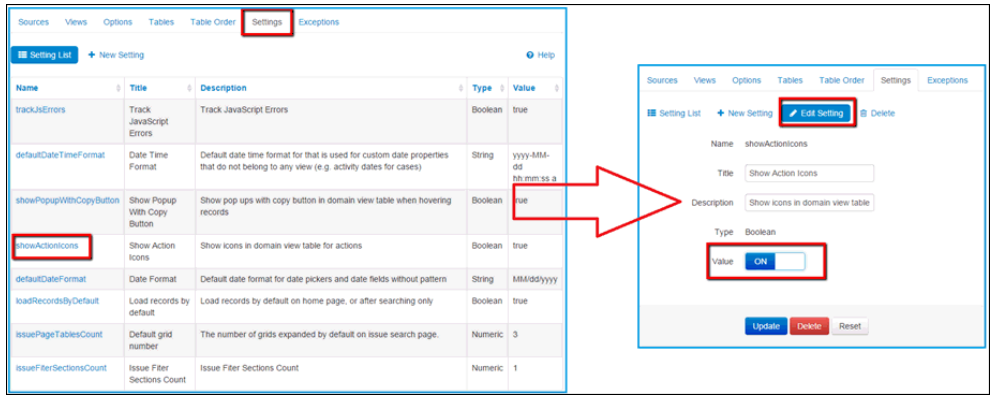
To configure the Copy button in Popup windows, click the *showPopupWithCopyButton* setting in the Settings tab and edit it accordingly.

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



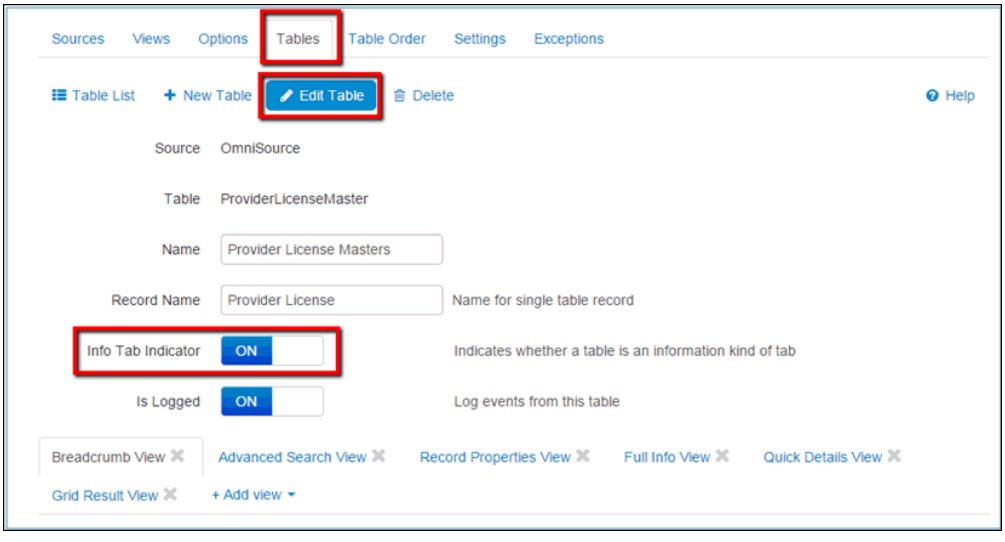
To configure the Master comparison and Details 360 display screens, click the Settings tab, then click the *showActionIcons* link from the list and edit it accordingly.

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

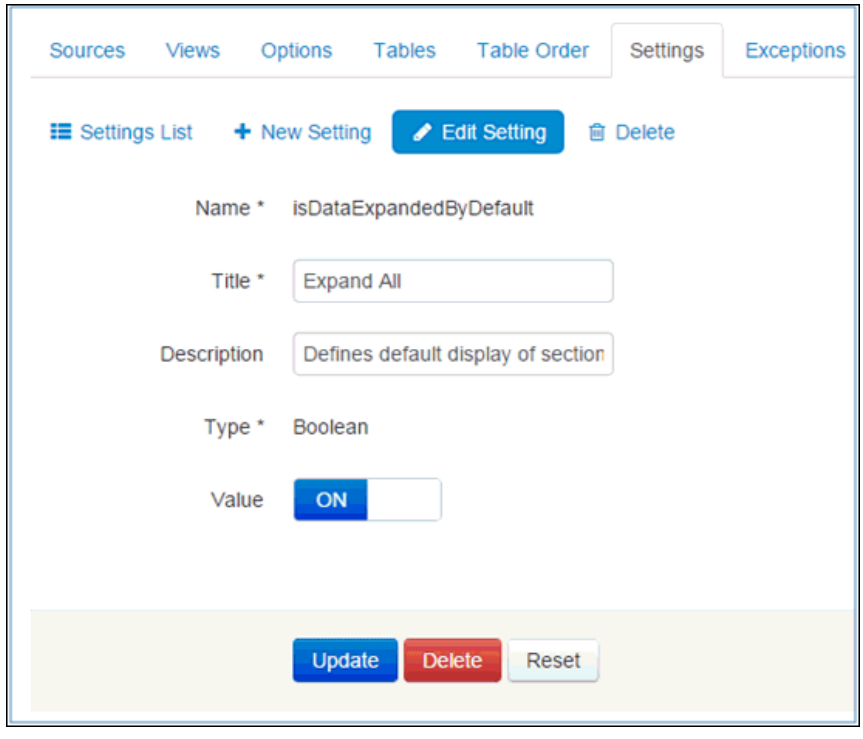


To configure the display of information tabs, click the Tables tab, select the required table from the list, and edit it accordingly.

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



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



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

Configuring Remediation Pages

In this section:

This section describes the configurations for the remediation pages.

Issues Page

In this section:

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

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

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

Case Issues Grid

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

- general
- domain

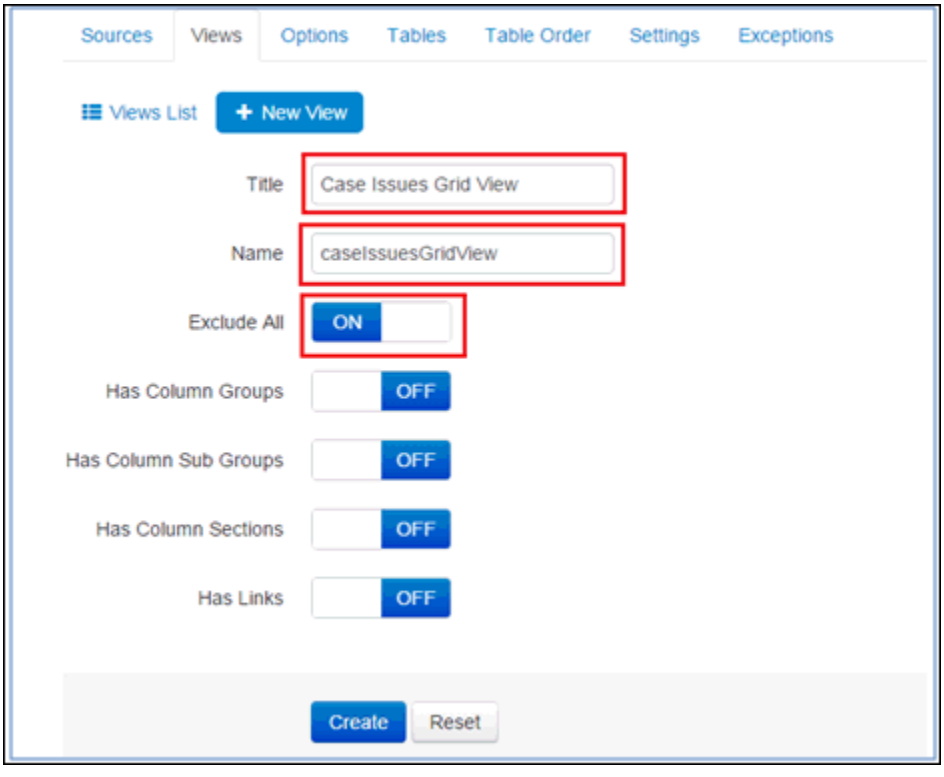
The general-related part includes columns which are common for all domains and configurations in the main Included section of the Case Issues Grid view.

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

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

- My filter Issues Grid
- All Filter Issues Grid
- Advanced Search View
- Case Issues Grid View

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

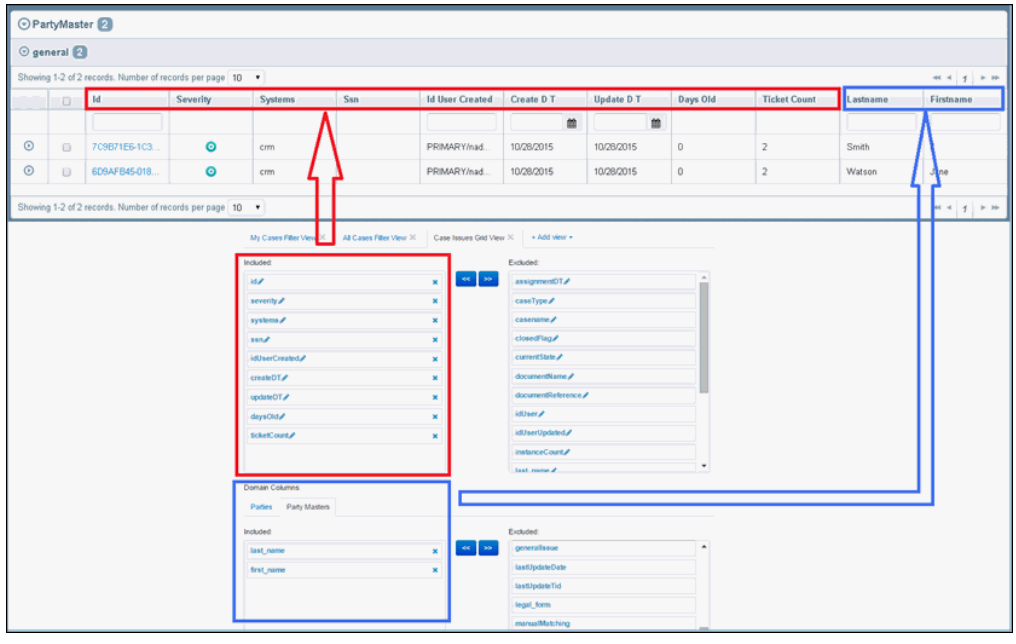


Click *Create* and then click the Tables tab, open the *WF Cases* table, and click *Edit Table*.

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

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

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

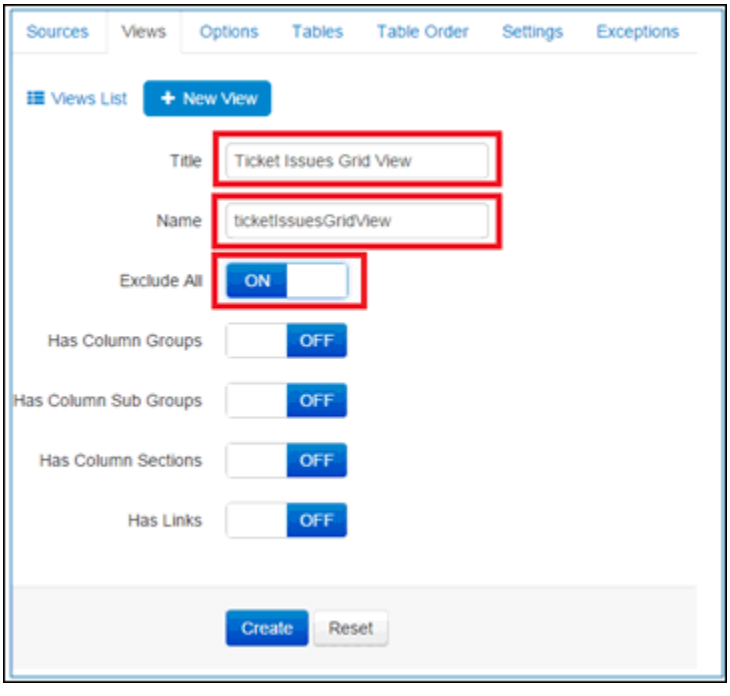


Ticket Issues Grid

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

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

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

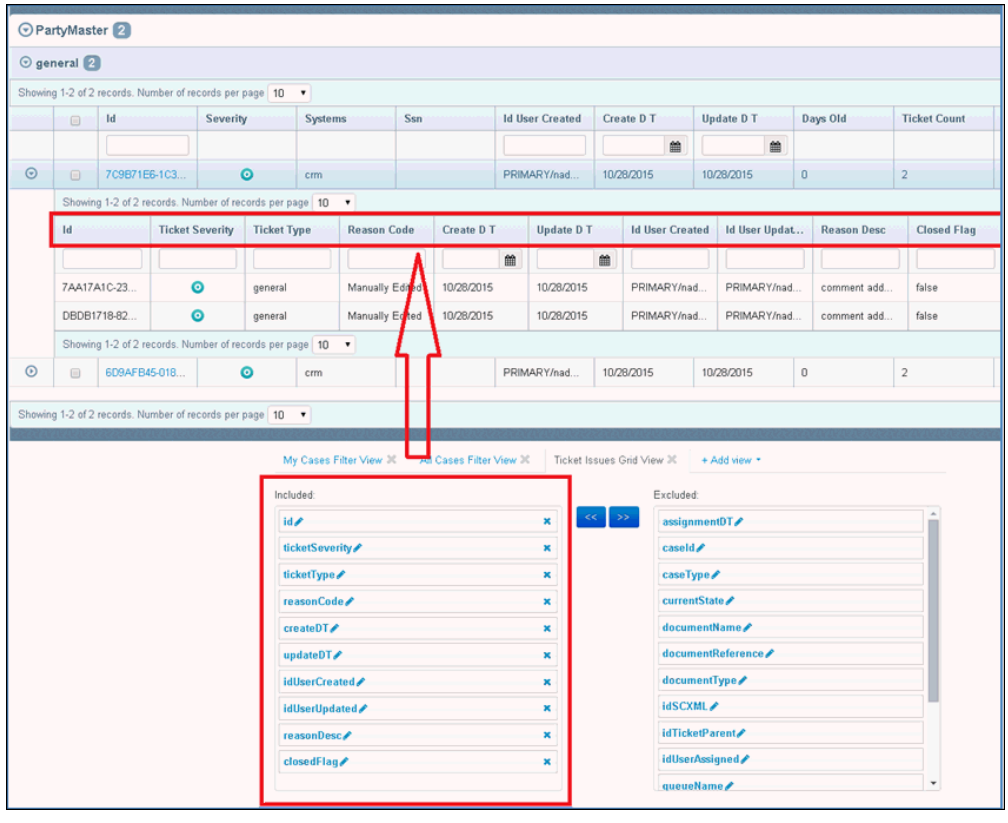


Click *Create*, and click Tables tab, then open the *WF Tickets* table and click *Edit Table*.

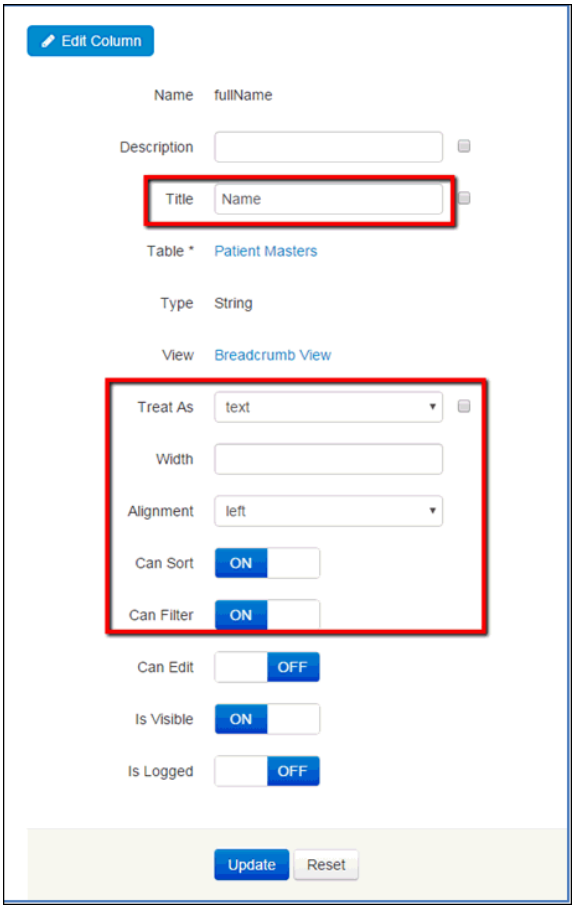
Add the required Views from the *Add View* drop-down list and exclude any that are not required.

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

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



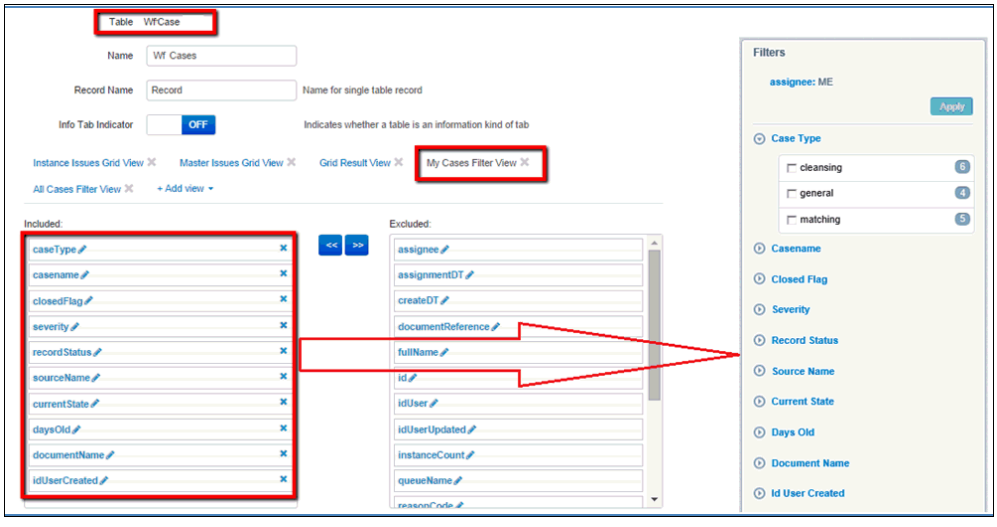
The configuration of nested columns (for example, display name, sortable, filterable) are available by clicking the pencil (edit) icon for the appropriate columns and updating the corresponding options.



Filtering Panel on My Cases Tab

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

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



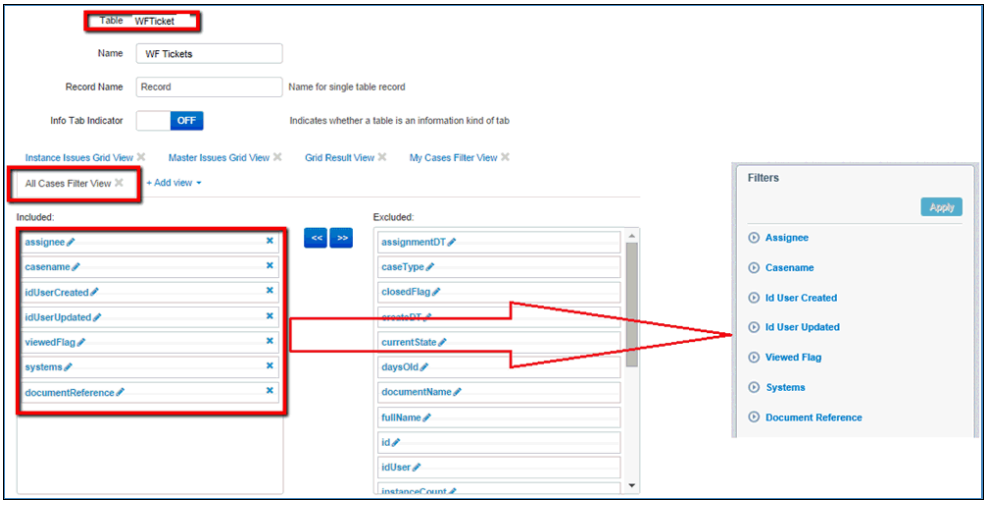
To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

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

Filtering Panel on All Cases Tab

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

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



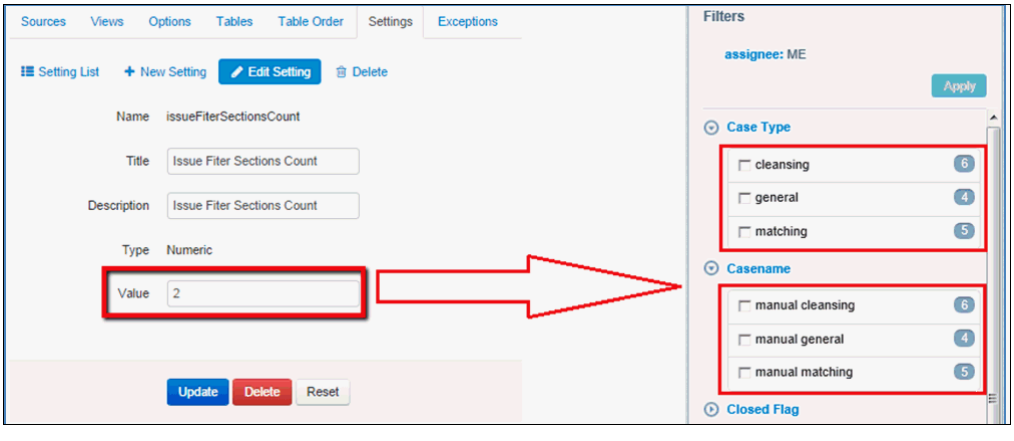
To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

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

Number of Filtering Criteria Sections Expanded by Default

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

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

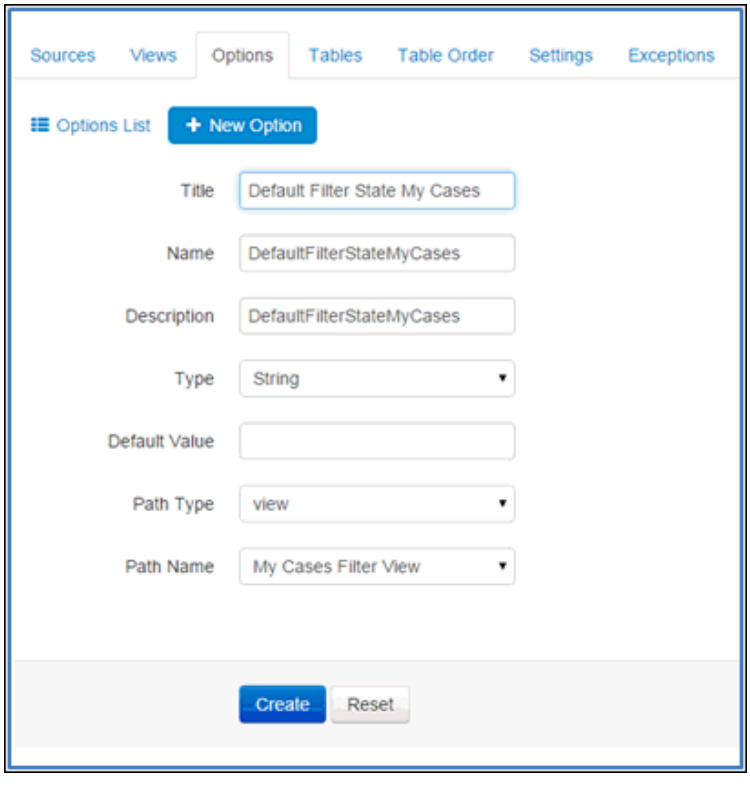


This setting is applied to Filtering panels on both the My Cases and All Cases tabs.

Default Filtering on My Cases/All Cases Tab

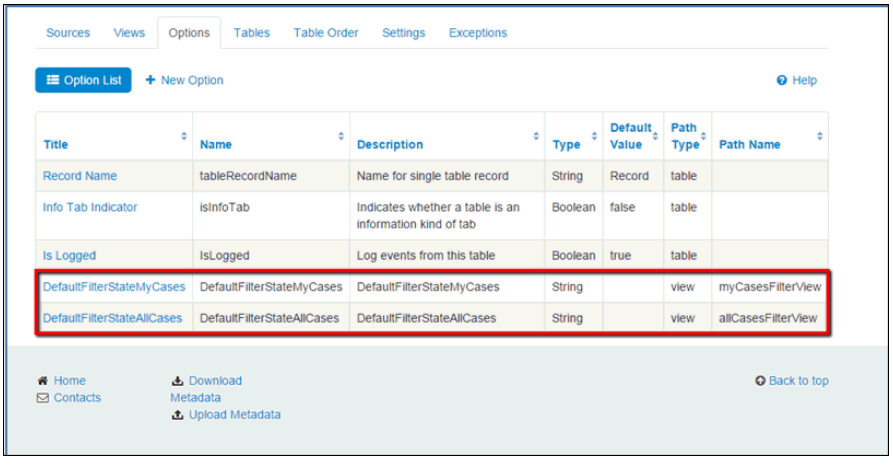
In order to have default filters in the issue search page, you must create the following options accordingly:

- DefaultFiltersMyCases
- DefaultFiltersAllCases



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

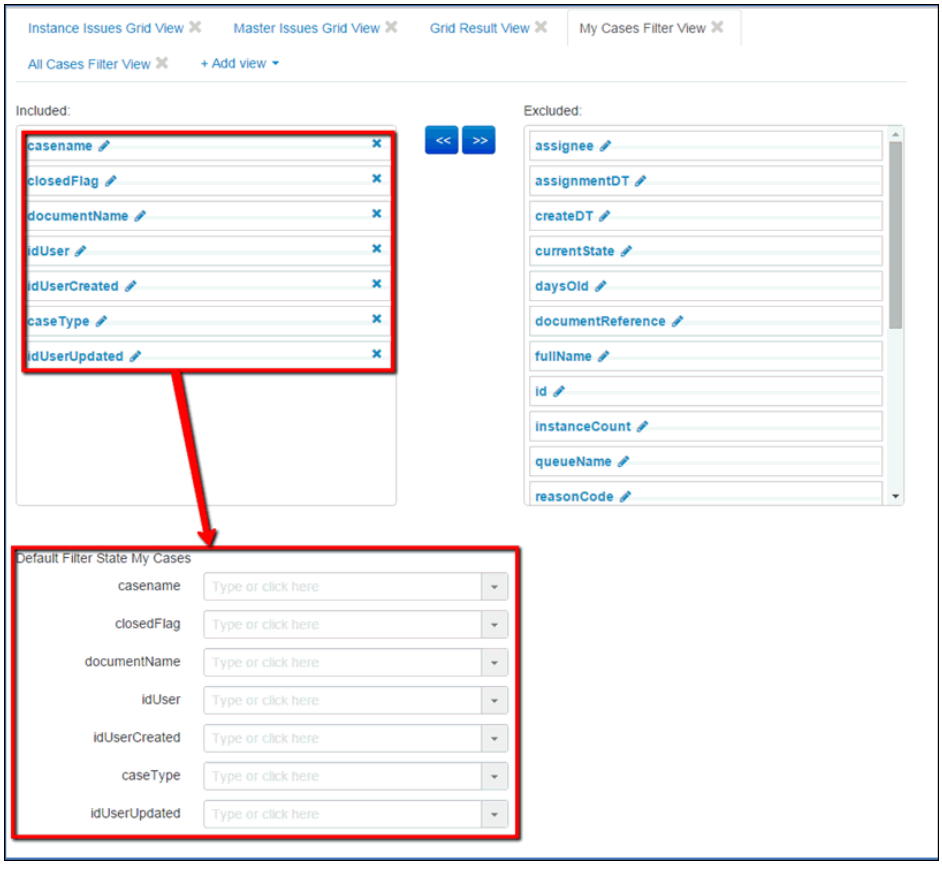
When the options are created, they will appear in a list of options, as shown in the following image.



Title	Name	Description	Type	Default Value	Path Type	Path Name
Record Name	tableRecordName	Name for single table record	String	Record	table	
Info Tab Indicator	isInfoTab	Indicates whether a table is an information kind of tab	Boolean	false	table	
Is Logged	IsLogged	Log events from this table	Boolean	true	table	
DefaultFilterStateMyCases	DefaultFilterStateMyCases	DefaultFilterStateMyCases	String		view	myCasesFilterView
DefaultFilterStateAllCases	DefaultFilterStateAllCases	DefaultFilterStateAllCases	String		view	allCasesFilterView

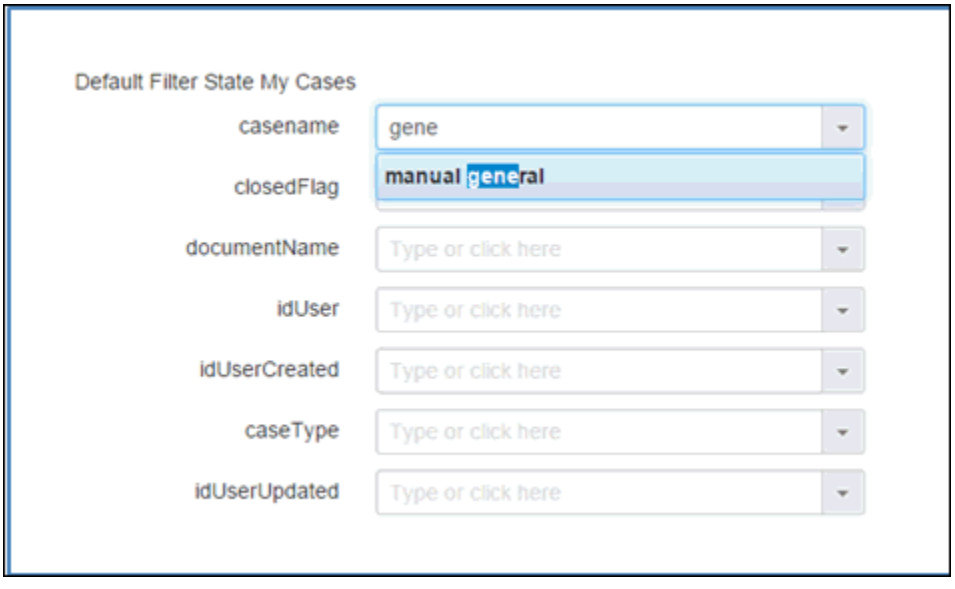
After the options have been added, add the required values to the default filtering section for the corresponding tab of the WF Cases table.

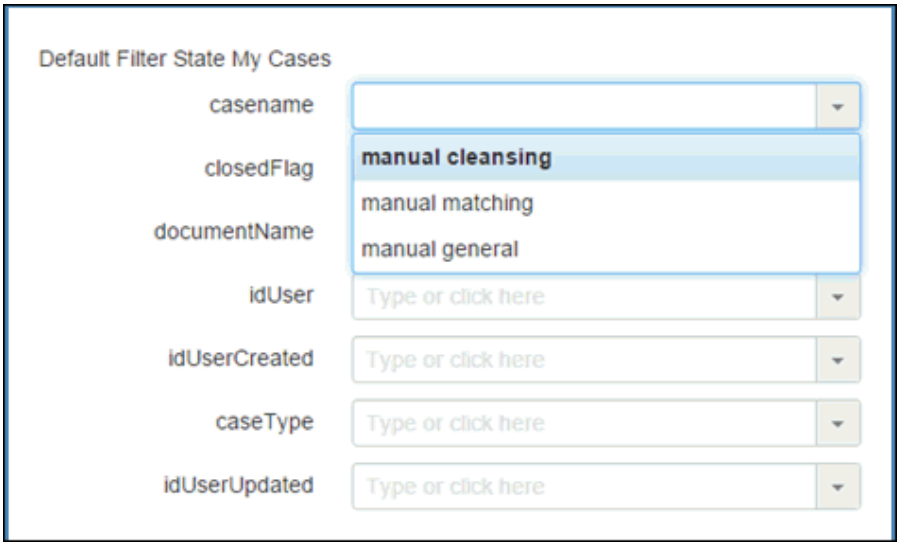
The following image shows the columns that are in the Included section of the My Cases and All Cases filter view.



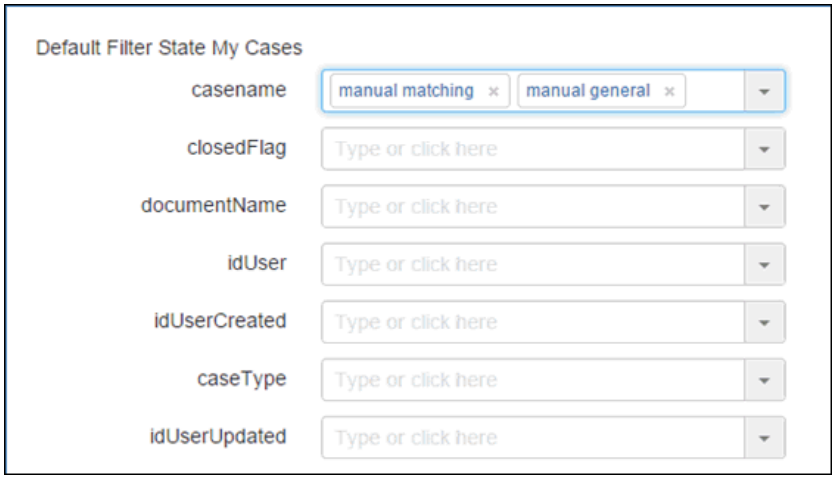
If a column is moved to the Excluded section, it will automatically disappear from the Default Filtering section.

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





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



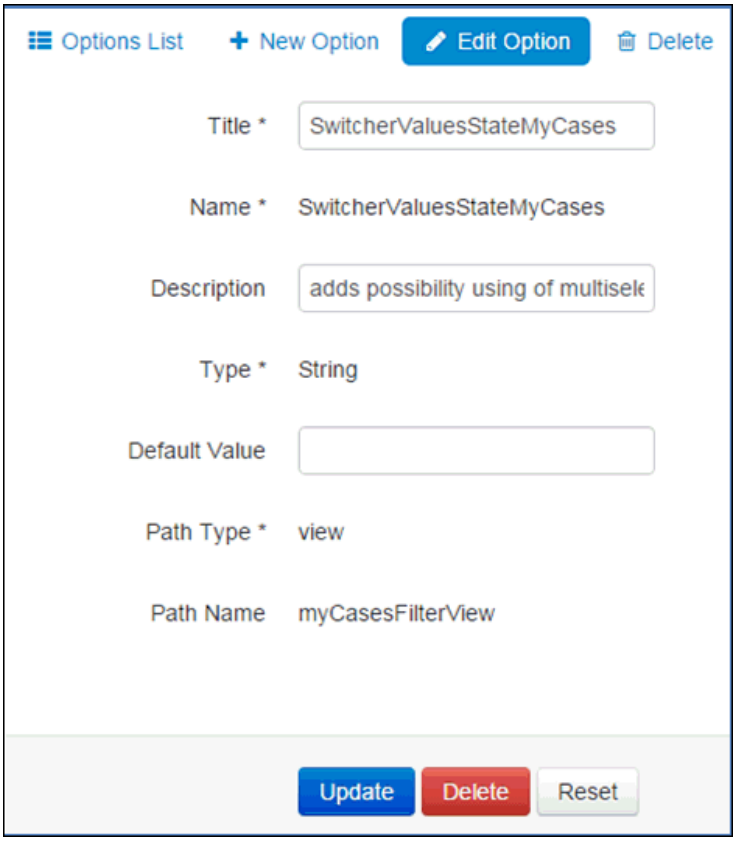
After the required values are set, click *Update* to apply the changes.

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

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

- SwitcherValuesStateAllCases

- SwitcherValuesStateMyCases



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

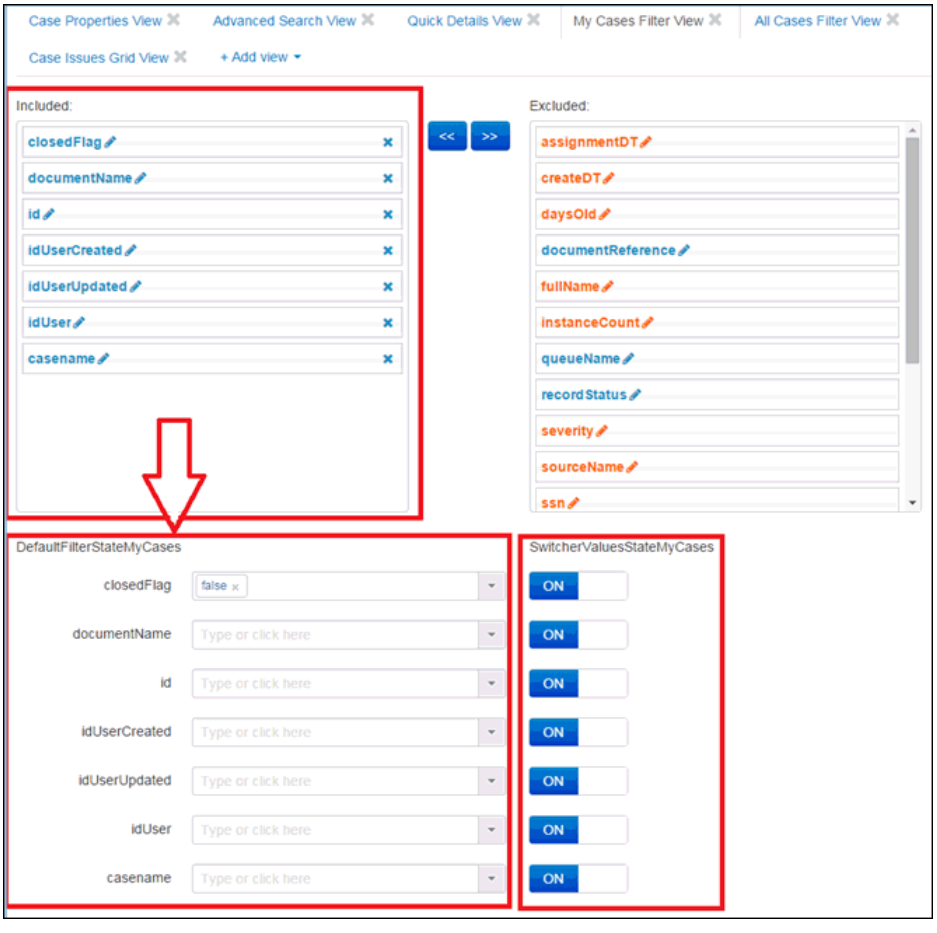
When the options are created, they will appear in the list of options, as shown in the following image:

Sources Views Options Tables Table Order Settings Exceptions

Options List + New Option Help

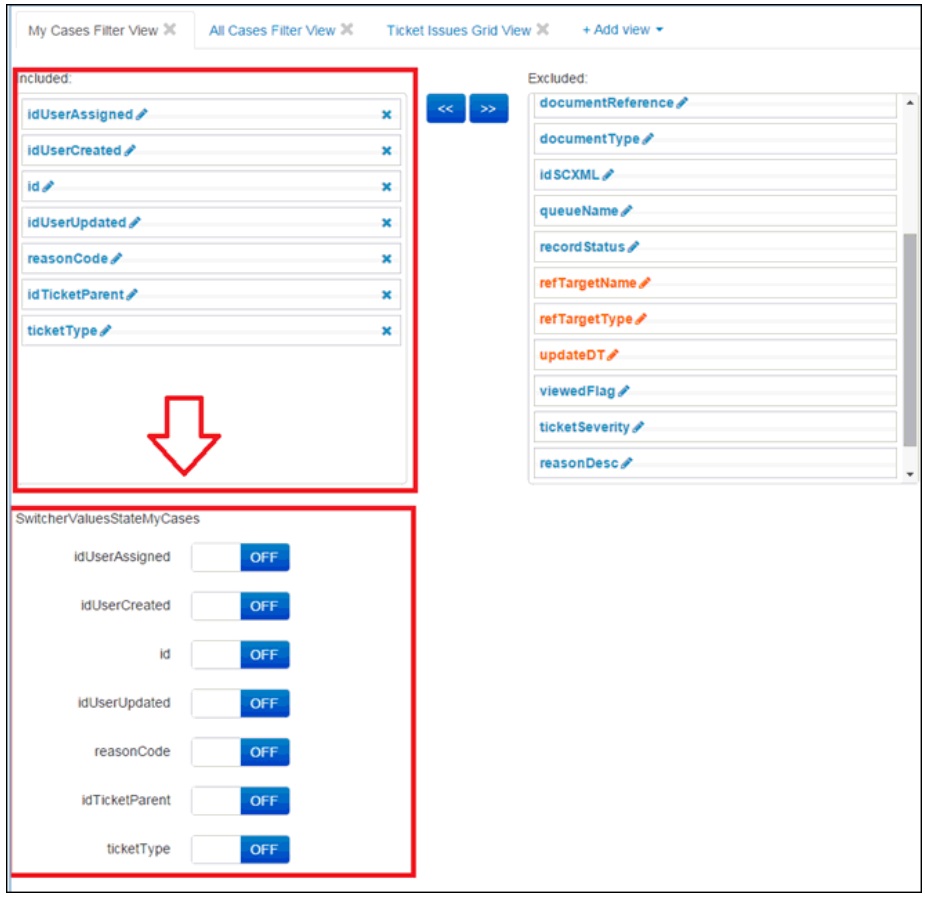
Title	Name	Description	Type	Default Value	Path Type	Path Name
Record Name	tableRecordName	Name for single table record	String	Record	table	
Info Tab Indicator	isInfoTab	Indicates whether a table is an information kind of tab	Boolean	false	table	
Is Logged	IsLogged	Log events from this table	Boolean	true	table	
DefaultFilterStateMyCases	DefaultFilterStateMyCases	DefaultFilterStateMyCases	String		view	myCasesFilterView
DefaultFilterStateAllCases	DefaultFilterStateAllCases	DefaultFilterStateAllCases	String		view	allCasesFilterView
SwitcherValuesStateAllCases	SwitcherValuesStateAllCases	adds possibility using of multiselect switchers for configuring of filtering items on All Cases	String		view	allCasesFilterView
SwitcherValuesStateMyCases	SwitcherValuesStateMyCases	adds possibility using of multiselect switchers for configuring of filtering items on My cases	String		view	myCasesFilterView

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



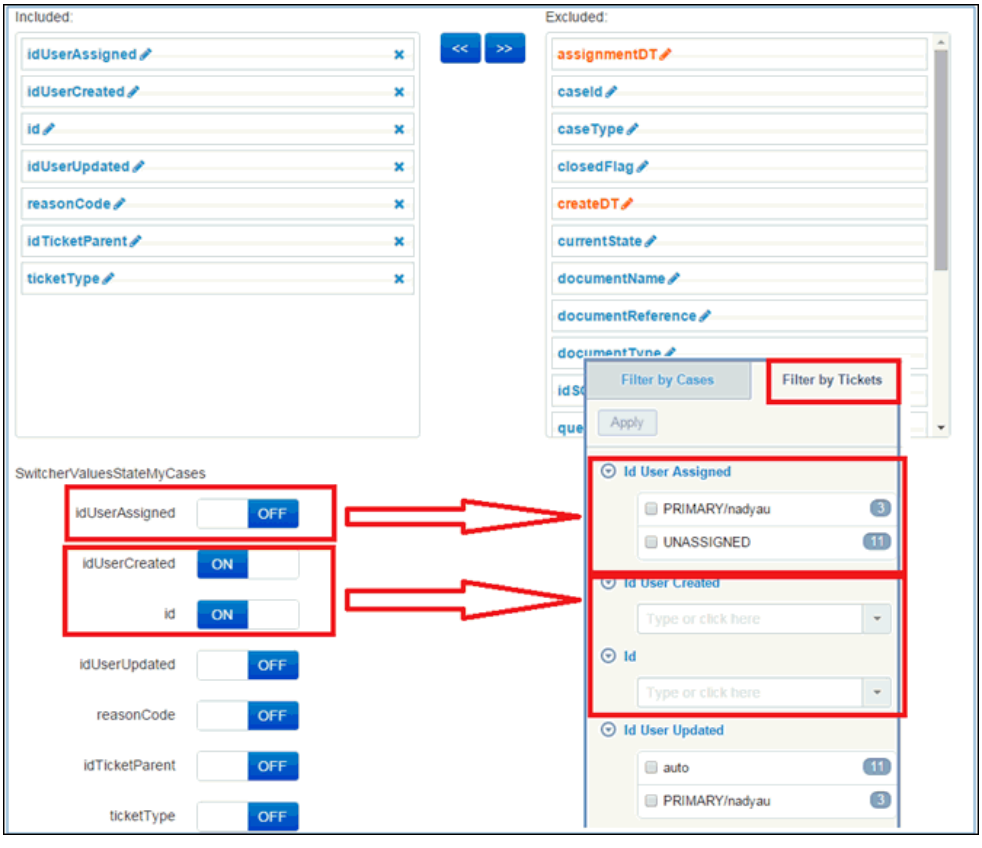
The Default setting of the multiselect switch is set to *OFF*, and the UI of the fields are displayed with check boxes. If a column is moved to the Excluded section, then it will automatically disappear from the Default Filtering section.

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



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

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



Override Matching Page

In this section:

Instance Details Panel

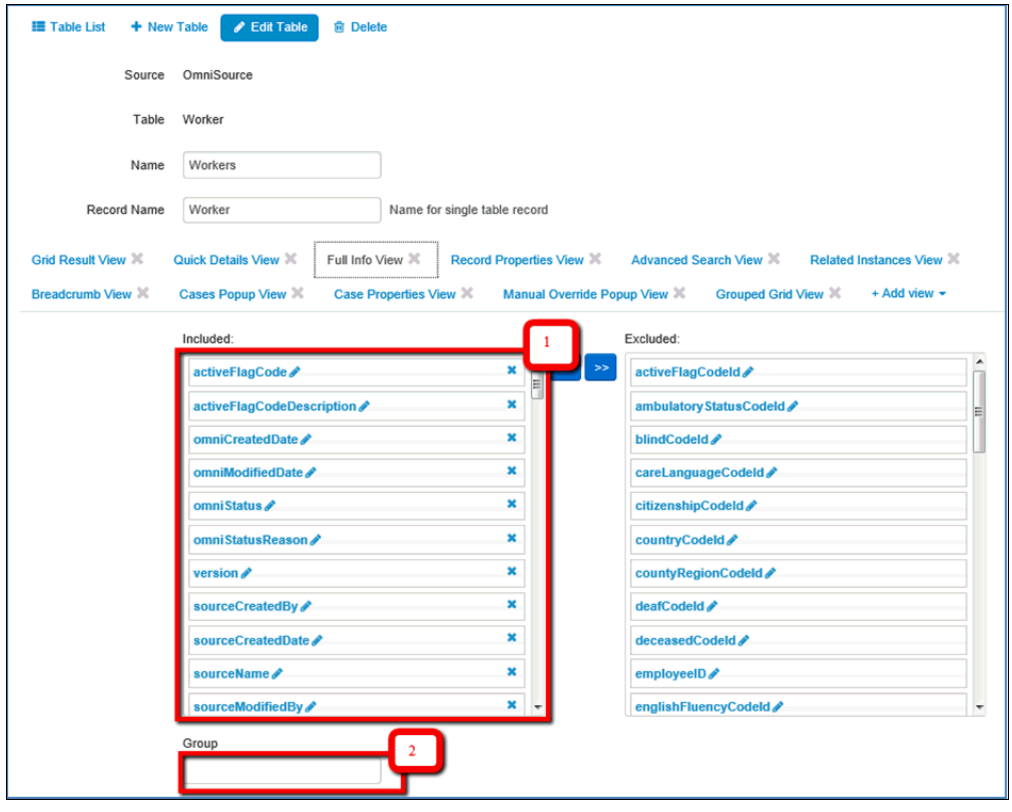
Case Properties Panel

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

Instance Details Panel

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

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



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

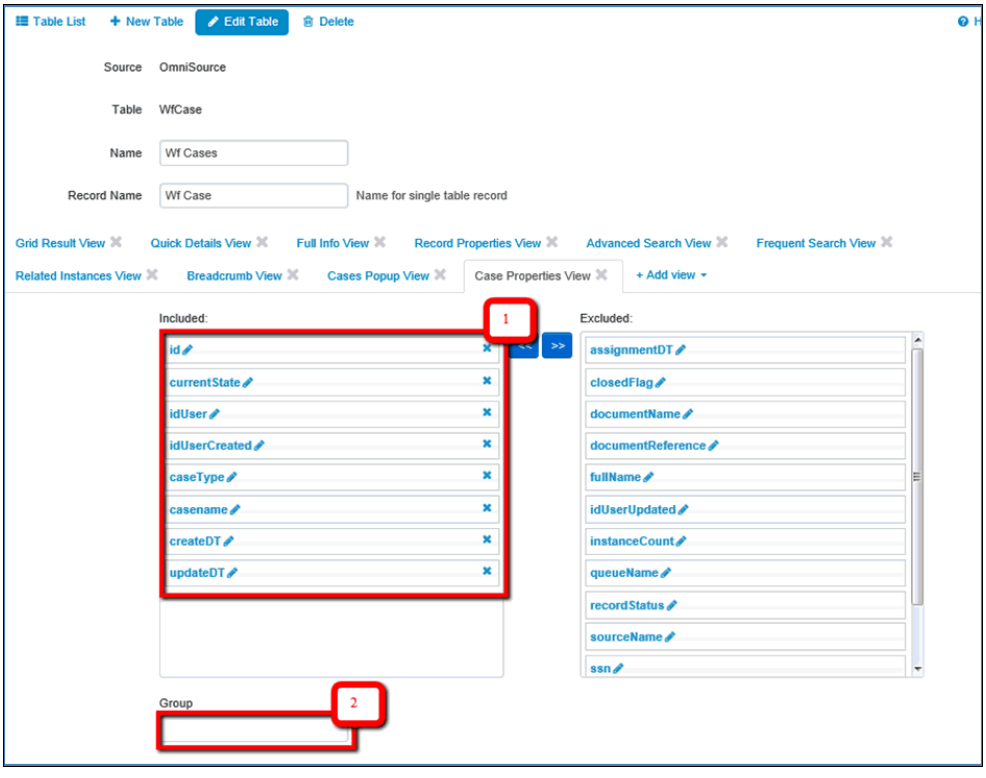
Click the *X* icon if you wish to exclude a column from the view (1).

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

Case Properties Panel

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

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



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

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

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

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

Manual Cleansing Page

In this section:

Workspace Panel

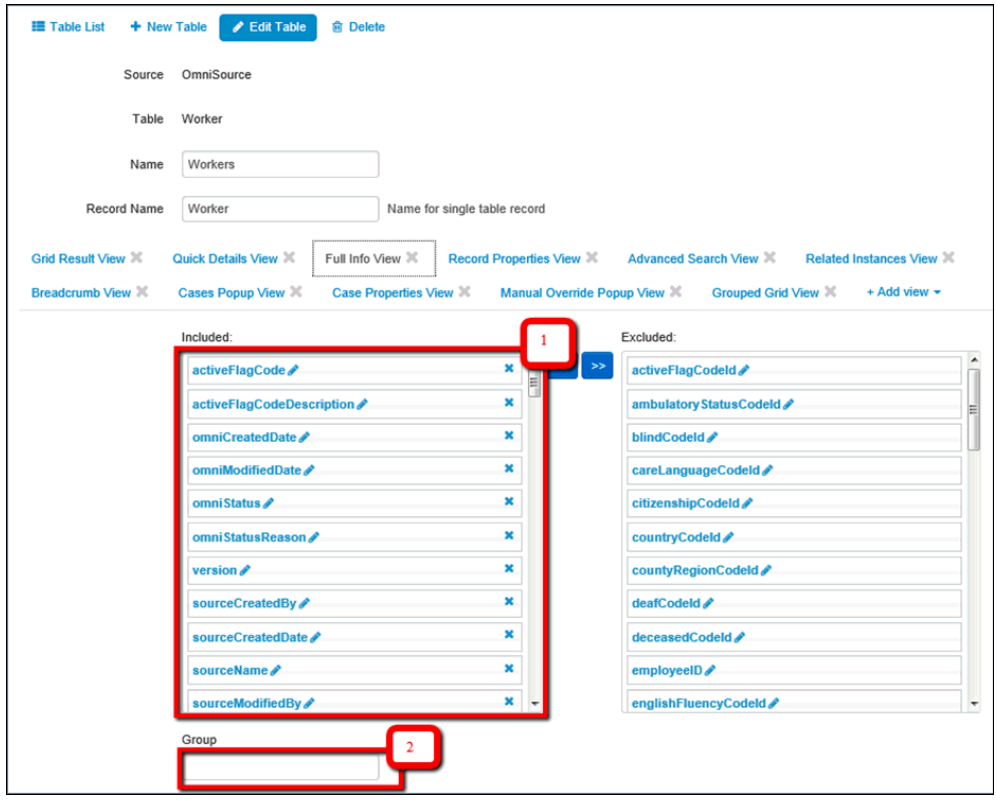
Case Properties Panel

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

Workspace Panel

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

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



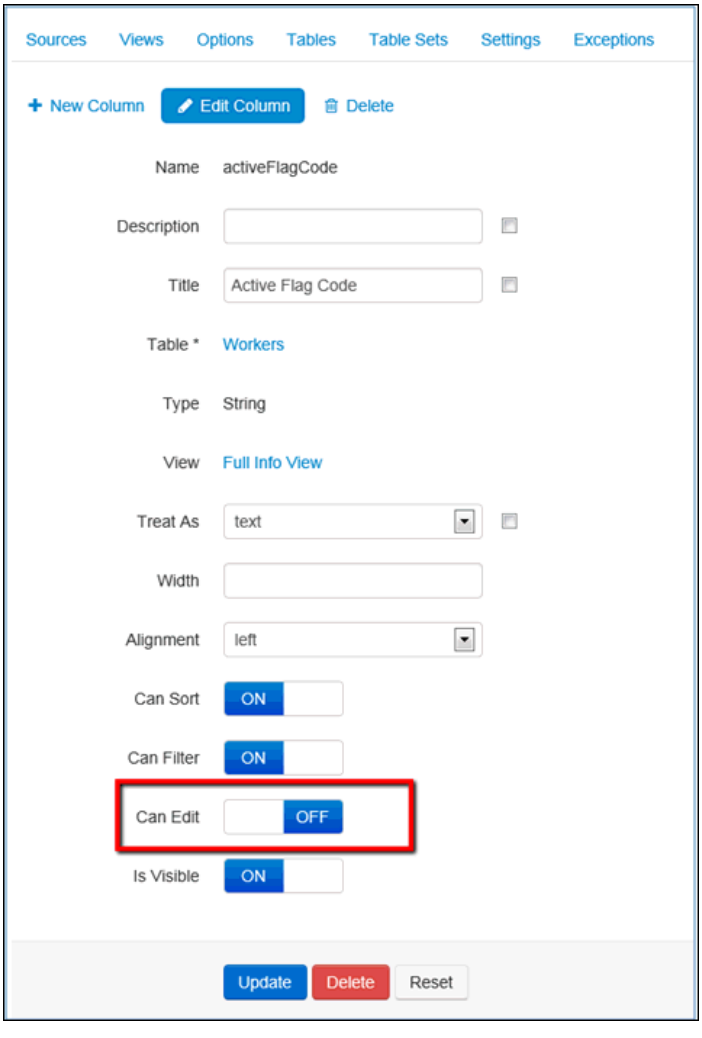
To rearrange the columns in the view, drag the required column from the Excluded section to the Included section, especially if you wish to include the column in the view.

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

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

Ability to Allow/Prohibit Editing for Fields

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

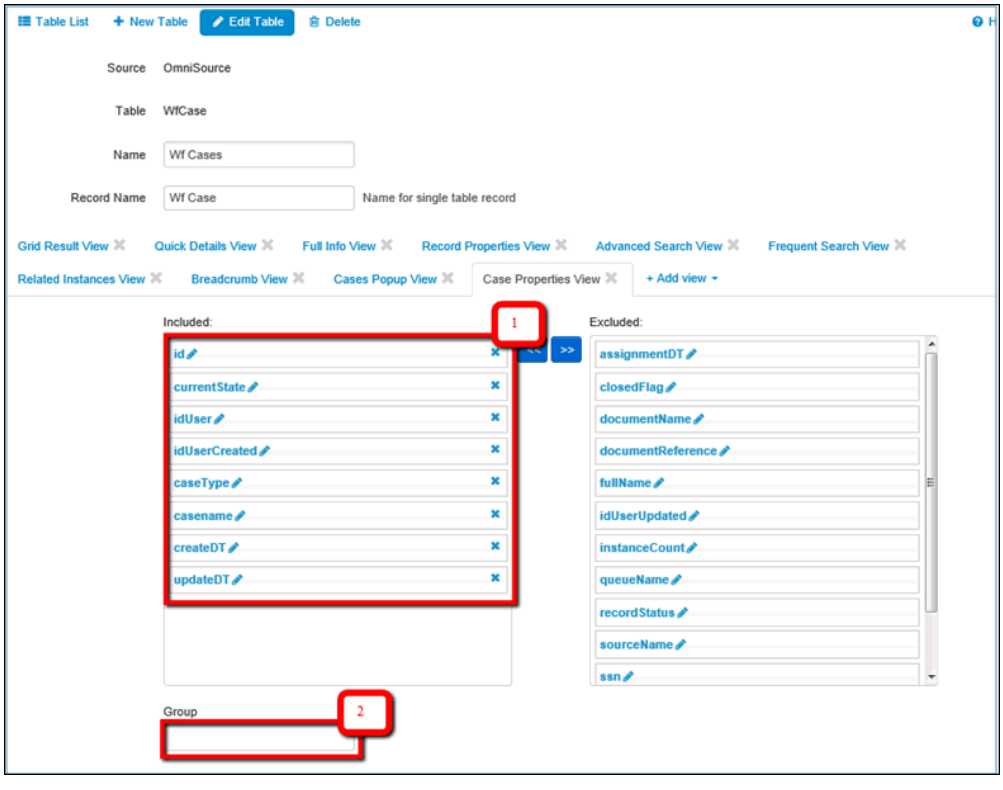


If a field needs to be disabled for editing, select the *OFF* option. Otherwise, select ON if there are no changes.

Case Properties Panel

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

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



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

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

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

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

General Issue Page

In this section:

Workspace Panel

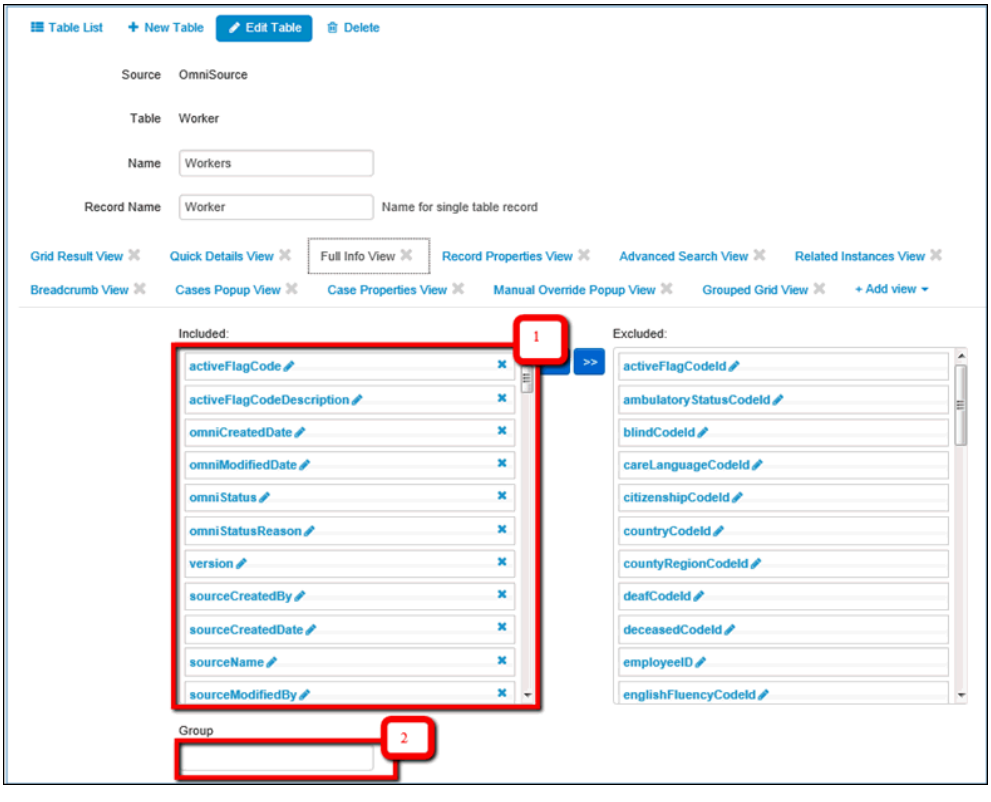
Case Properties Panel

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

Workspace Panel

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

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



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

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

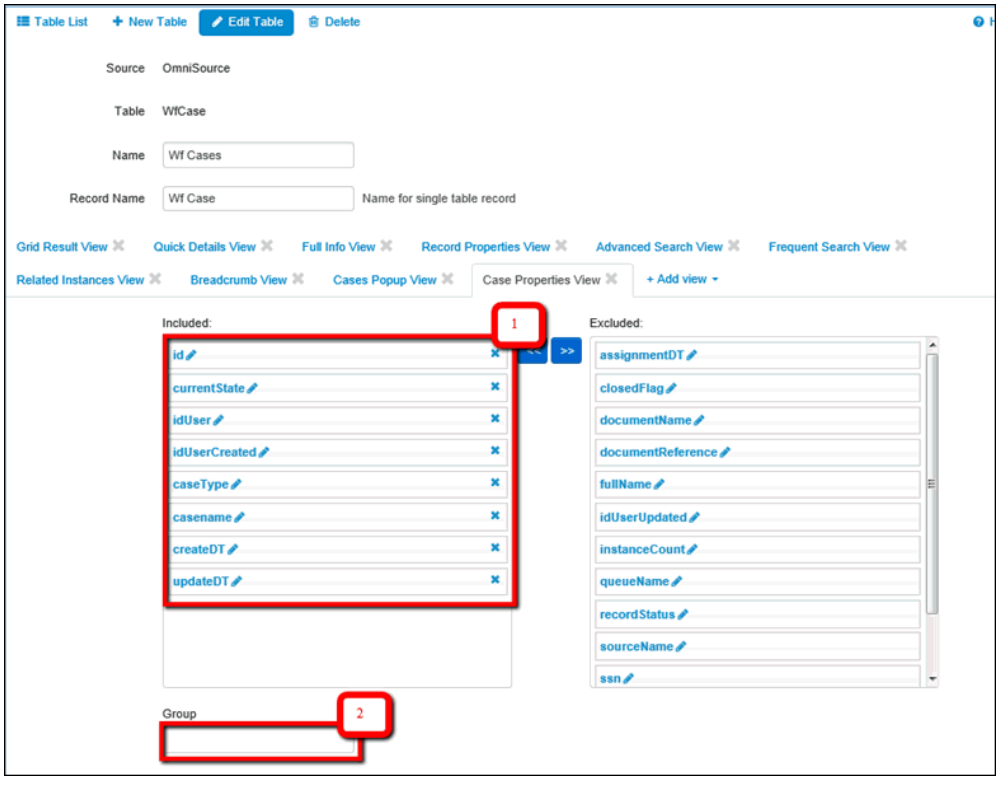
If you wish to separate the columns into Groups, add the appropriate group to the Included section (2).

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

Case Properties Panel

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

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



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

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

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

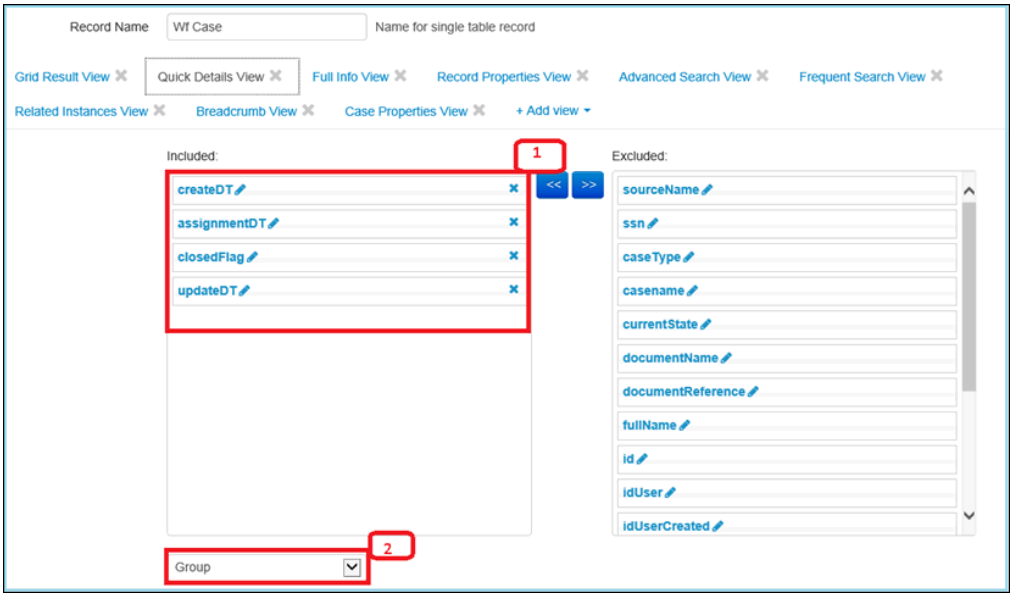
Note: For this view, the names of groups will not be displayed. A horizontal line will appear instead.

Issues Pop Up

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

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

The consists of many views. Click *Quick Details View*.



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

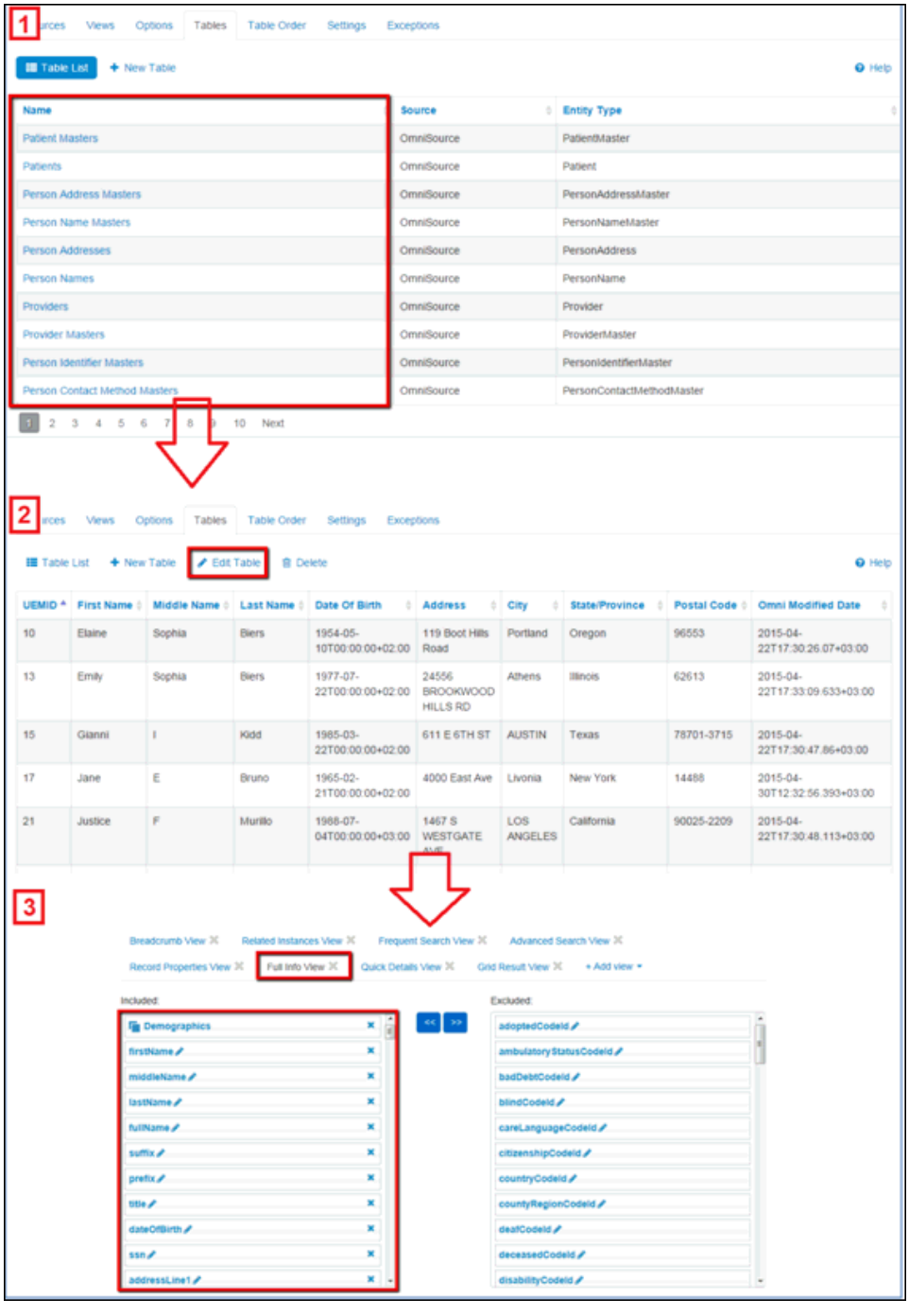
Click the *X* icon if you wish to exclude a column from the view (1).

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

Domain Grid Configuration

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

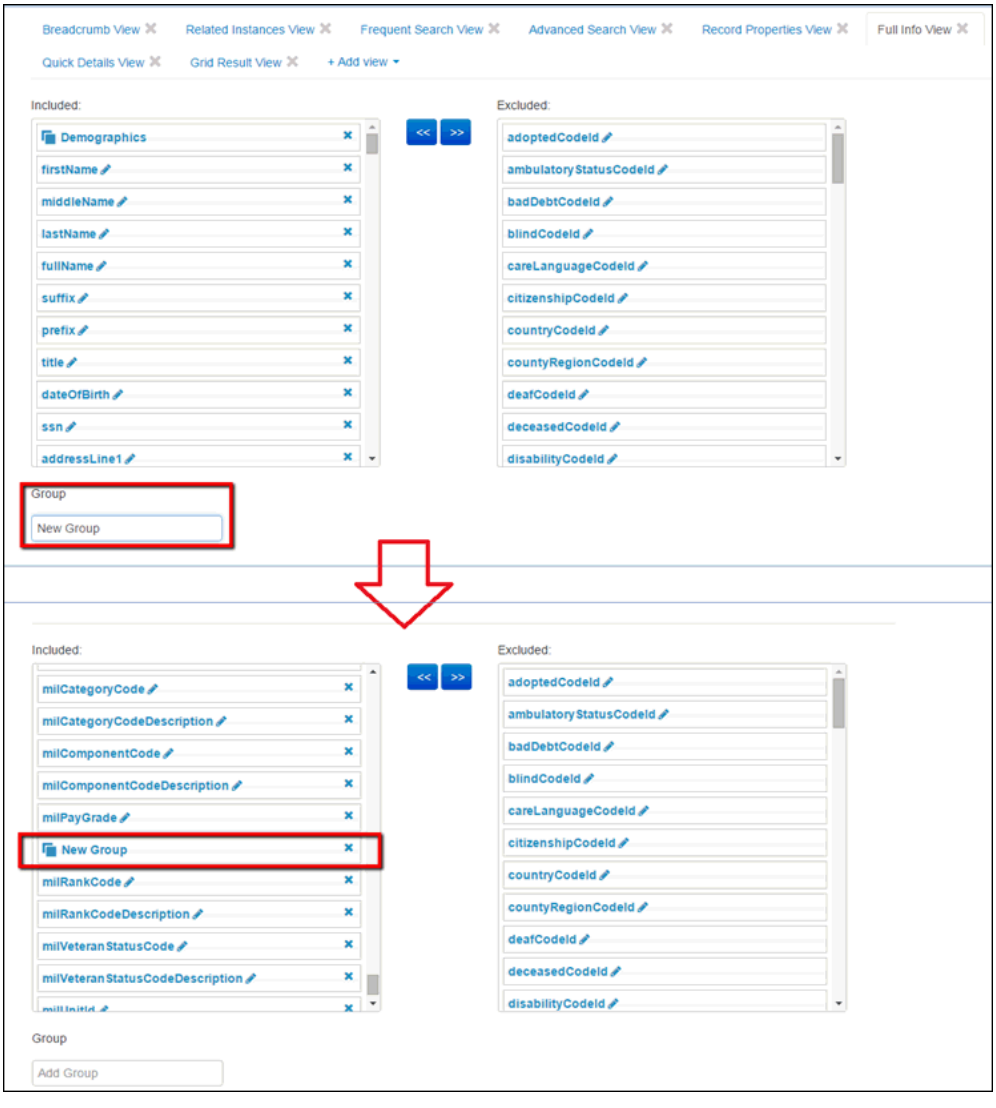
The following image shows the steps required to configure the domain grid.


1
Views
Options
Tables
Table Order
Settings
Exceptions
Table List
New Table
Help
Name
Source
Entity Type
Patient Masters
OmniSource
PatientMaster
Patients
OmniSource
Patient
Person Address Masters
OmniSource
PersonAddressMaster
Person Name Masters
OmniSource
PersonNameMaster
Person Addresses
OmniSource
PersonAddress
Person Names
OmniSource
PersonName
Providers
OmniSource
Provider
Provider Masters
OmniSource
ProviderMaster
Person Identifier Masters
OmniSource
PersonIdentifierMaster
Person Contact Method Masters
OmniSource
PersonContactMethodMaster
1 2 3 4 5 6 7 8 9 10 Next
2
Views
Options
Tables
Table Order
Settings
Exceptions
Table List
New Table
Edit Table
Delete
Help
UEMID
First Name
Middle Name
Last Name
Date Of Birth
Address
City
State/Province
Postal Code
Omni Modified Date
10 Elaine Sophia Biers 1954-05-10T00:00:00+02:00 119 Boot Hills Road Portland Oregon 96553 2015-04-22T17:30:26.07+03:00
13 Emily Sophia Biers 1977-07-22T00:00:00+02:00 24556 BROOKWOOD HILLS RD Athens Illinois 62613 2015-04-22T17:33:09.633+03:00
15 Gianni I Kidd 1985-03-22T00:00:00+02:00 611 E 6TH ST AUSTIN Texas 78701-3715 2015-04-22T17:30:47.86+03:00
17 Jane E Bruno 1965-02-21T00:00:00+02:00 4000 East Ave Livonia New York 14488 2015-04-30T12:32:56.393+03:00
21 Justice F Murillo 1988-07-04T00:00:00+03:00 1467 S WESTGATE AVE LOS ANGELES California 90025-2209 2015-04-22T17:30:48.113+03:00
3
Breadcrumb View
Related Instances View
Frequent Search View
Advanced Search View
Record Properties View
Full Info View
Quick Details View
Grid Result View
+ Add view
Included:
Excluded:
Demographics
firstName
middleName
lastName
fullName
suffix
prefix
title
dateOfBirth
ssn
addressLine1
adoptedCodeId
ambulatoryStatusCodeId
badDebtCodeId
blindCodeId
careLanguageCodeId
citizenshipCodeId
countryCodeId
countyRegionCodeId
dealCodeId
deceasedCodeId
disabilityCodeId

1. Find the required table in the list of tables.
2. Edit the table.
3. Click *Full Info View*

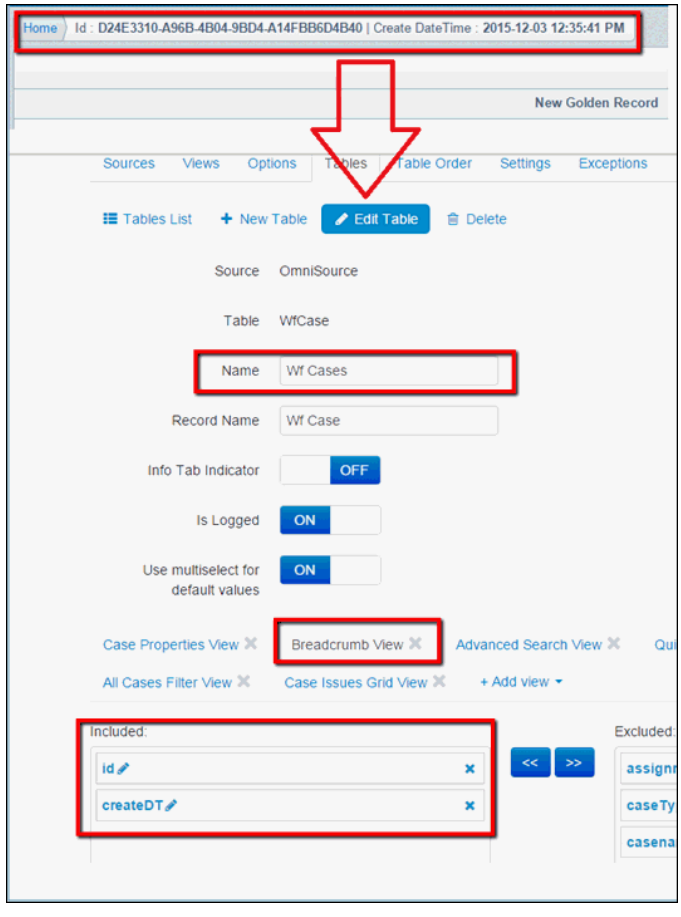
To divide the fields on the page into sections, edit the Group field and press *Enter* (Full Info view). The header of the section will be added into the list of included columns.

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



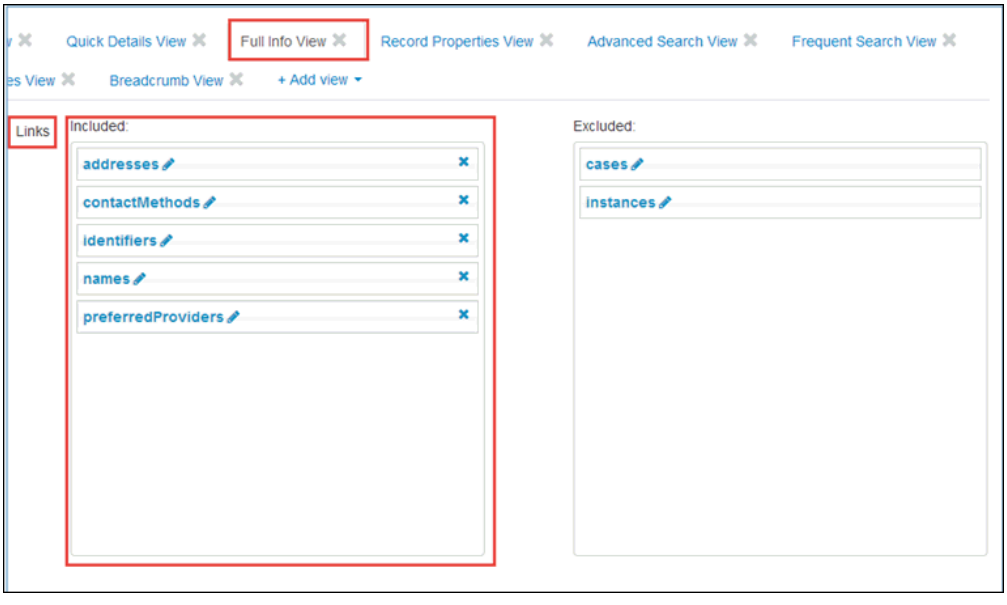
Breadcrumbs Configuration

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



Sub-domains Configuration

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



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