



Omnisient User Manual

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Data Preparation Format

The dataset you wish to upload can be either uploaded from a flat file (txt, csv) in a tabular relational manner, or directly from the following relational databases:

- Microsoft / Azure SQL Server; MySQL / MariaDB;
- PostgreSQL.

For Flat / Parquet files:

- File extensions accepted: *.csv, *.tsv, *.txt and* .parquet
- Please ensure all rows to have the same number of columns i.e. delimiters; •
- Please ensure there are noblank fields in the header row (1st row);
- Please ensure the header row does not contain headers with any of the following names: iURN, error;
- Please preview your raw data to make sure everything is in order using notepad or notepad++;
- Text Files need to be delimited, we recommend using tabs or pipe (|) characters.

For SQL Tables:

- Please ensure that each table has a sequential number/date field. This is necessary as the rows get loaded in batches and we get the next batch based on the next number or date last read.

Data Briefing

Soon after a license is purchased and credentials are issued via the welcome email, a data briefing session is organised with the business users, technical users, Omnisient Account Manager and Omnisient Support to discuss user's objectives from the system, and to outline the data to be uploaded.

Welcome Email

When a user license is created, the user will receive a welcome email with the user's credentials, a link to the system user manuals, and further instructions to get started on the platform.

The password needs to be changed as soon as possible, but within 24 hours, by following the link in the welcome email or by clicking on the "reset password" link on the login screen.

Hi Test Chess User Demo,

Welcome to the Omnisient platform.

You have been registered as a user for **OmnisientUAT**.

The platform will allow you to securely and anonymously share data and explore opportunities.

Get started in 5 easy steps

1. [Click here](#) to set a secure password for your account.
2. [Click here](#) to download and install the Omnisient Data Onboarding

Firewall Access Required

If your firewall is blocking the app install or the use thereof, please contact your IT administrator and have the following URLs added to your whitelist:

IP Ranges:

- <https://www.cloudflare.com/ips/>

South Africa – app.omnisient.com

- api.omnisient.com
- app.omnisient.com
- auth.omnisient.com
- static.omnisient.com
- intersect.blob.core.windows.net

UAE – uae.omnisient.com

- api-uae.omnisient.com
- uae.omnisient.com
- auth-uae.omnisient.com
- staticuae.omnisient.com
- stblobomniprduan.blob.core.windows.net

US East – us-east.omnisient.com

- api-eus.omnisient.com
- us-east.omnisient.com
- auth-eus.omnisient.com
- static-eus.omnisient.com
- stblobomniprdeus.blob.core.windows.net

General Domains

- desktopv2files.omnisient.com
- columnprediction.blob.core.windows.net

Minimum System Requirements

The Web application can be used by visiting the web app URL using any standard web browser (Chrome, Safari, Firefox, Edge)

The recommended requirements where the desktop app is being installed are:

1. Operating System: Windows 10 64-bit
 - Should you not have a Windows machine please use a Windows Virtual Machine
2. RAM: 8 – 16 GB (depending on upload file size)
3. Processor: Basic Intel® Core™ i5 or better
4. Hard drive space between 3x the size of the raw file size being uploaded

Personal Information Data and Privacy

The desktop onboarding app is used to tokenize and anonymised all personal information (information that uniquely identifies an individual) before any data leaves the user's local environment. Only anonymized, hashed data is held on the Omnisient Platform and used for analysis

and campaigns.

All access to uploaded data is managed by the users themselves. The system is built with privacy-by-design principles.

User Access Levels

When a company registers an account with Omnisient and obtains a license, individual users within that company receive their own login credentials to access the platform. These user licenses are associated with the parent company and come with default access to datasets and analytic insights, as outlined in the table below.

As different companies may have varying roles and responsibilities, users with Admin privileges have the ability to configure permissions according to their specific requirements. Admin users can modify the profiles of User-type users, restricting their access to only the functions that are relevant to their responsibilities. For detailed instructions on editing user permissions, please refer to the “Edit User Permissions” section under “Managing your Environment – Admin” in this guide.

By granting different levels of access and allowing Admin users to customize permissions, the Omnisient Platform ensures that each user has tailored access to the necessary features and functionalities based on their role within the company.

	Admin	User
Desktop	Y	Y
User Profile	Y	Y
Search/Comparisons	Y	Y
Dashboard	Y	Y
Platform Statistics	Y	Y
Trend Overlay	Y	Y
Reset Password	Y	Y
Datasets		
View Datasets	Y	Y
Reports	Y	Y
Upload Activity Log	Y	Y
Pushes Activity Log	Y	Y
Data Collaboration	Y	Y
Private Projects	Y	Y
Private Collaborations	Y	Y
View Exchanges	Y	Y
Projects		
Projects Dashboard	Y	Y
Create New	Y	Y
View Projects	Y	Y
Delete Project	Y (project owner)	Y (tables and reports)
Edit Project	Y (project owner)	
Manage Project	Y (project owner)	
Access to Project Data	Y (project owner)	Y
View & Upload Project Permissions	Y (project owner)	
Make Selections, Downloads, Deletes and Reload Selections	Y (project owner)	Y
View Reports	Y	Y
Can Delete Project Tables and Reports	Y	Y
Own Data Preparation	Y	
Legacy ACE Reports	Y	Y
Legacy ACE Selections	Y	Y
Legacy Overlays	Y	Y
Admin		
Activity Log	Y	
Users	Y	
API Keys	Y	
Role Pricing	Y	

Platform Details

The Omnisient platform allows companies to share data & insights securely and privately while remaining POPIA & GDPR compliant.

The Omnisient Secure Data Exchange platform allows companies to share data and insights and to execute campaigns securely and privately while remaining POPIA and GDPR compliant. The system comprises of a windows desktop application and a web application. The desktop application is installed on the user's local machine behind their firewalls and is used to choose and tokenize and hash (secure) any personal information before leaving the users environment. The Omnisient Web App is used to manage permissions to the tokenized datasets, manage users and view an audit trail of the activity on your company account.

The Web App also provides collaboration and analyses functionality including:

- Running overlap analyses with partner datasets to get quick insights into partnership potential.
- Carrying out further analytics and gaining insights from partner datasets.
- Via ACE (Anonymised Campaign Engine), profiling your data against a population, select an audience according to your required parameters which will provide a specific selection of people against which a campaign can be executed whilst staying POPIA and GDPR compliant.

References

support@omnisient.com

Login

How do I log in?

Begin by logging in using the user credentials sent via your welcome email on the following URL using any web browser: <https://app.omnisient.com>

omnisient

Version: 1.5.4.11492

Email *

chess@omnisient.com

Password *

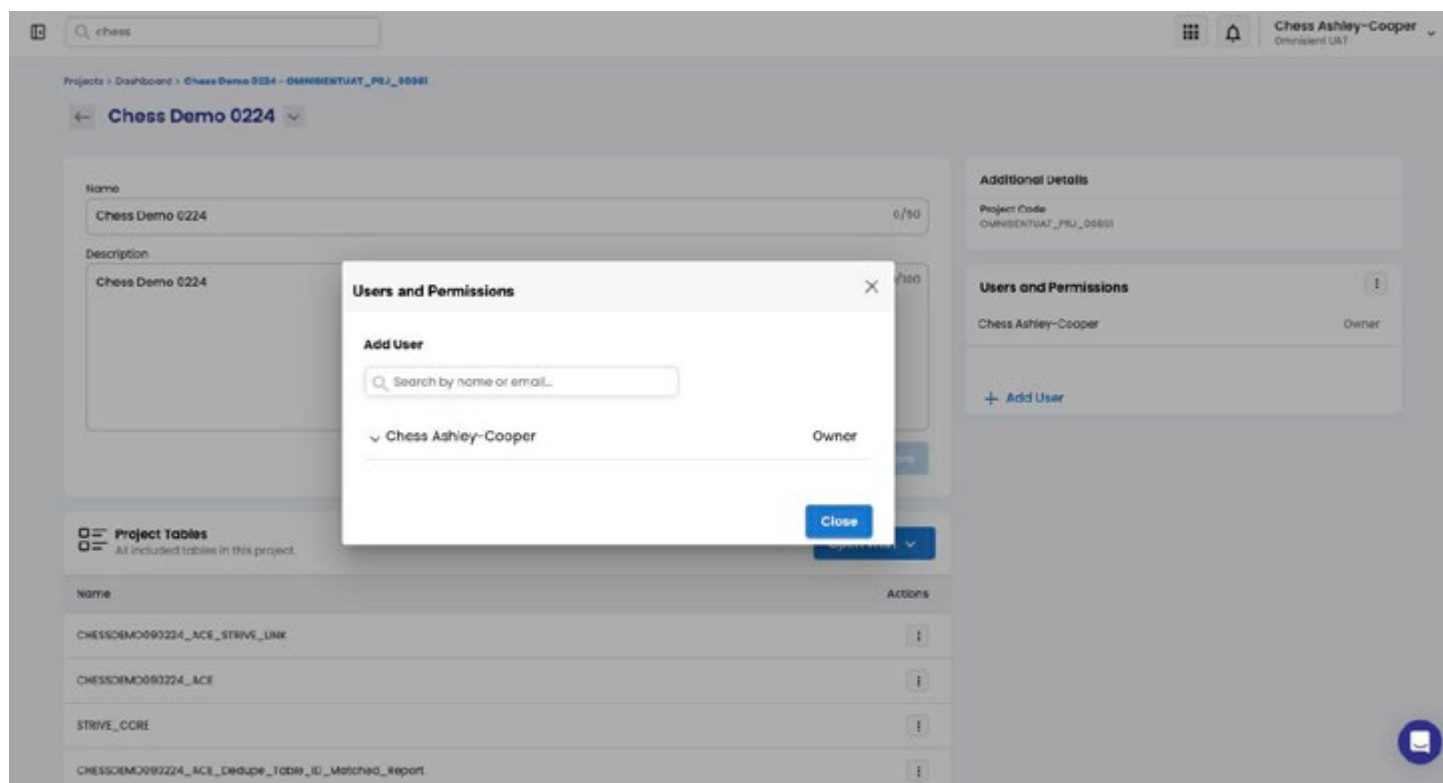
Login

Trouble logging in? Forgot Password?

Service Status

Permissions in SQLPad & Jupyter Notebook

It is crucial to manage access permissions effectively.



SQLPad & Jupyter Notebook Permissions

In the project context, it's crucial to manage access permissions effectively. Admin users not assigned to a project will have read- write access by default. To maintain data security and access control, it's essential to ensure that this access is promptly removed or updated when a user is deleted or when the level of access needs to be modified.

Permissions

Admin Users

- Admin users not assigned to a project will have read-write access by default.

Regular Users:

To utilize SQLPad & Jupyter Notebook, regular users will need to request access from the project owner directly.

- Assigning Users to a Project: Regular users must be assigned to a project before they can access any functionality on the project details page.
- Ensure that users are added to the project to enable their access.

When a user is deleted, their access will be promptly removed to maintain data security we will update their permissions accordingly to ensure the appropriate level of access is granted.

Step-by-Step Instructions:

- **Access Request:** Regular users who require access to Own Data Preparation should follow the designated process to request access.
- **Read-Write Access to Company Schema:** All users with access to Own Data Preparation will have read-write access to the company schema. This ensures they can effectively manage and manipulate data within the company context.

Efficient management of SQLPad & Jupyter Notebook in both project and company contexts is crucial for maintaining data security and optimizing user access. By following the provided instructions, you can ensure that access permissions are appropriately granted, updated, or removed as needed, enabling a secure and seamless data preparation experience.

Setting Access Control and Dataset Permissions on Unregistered Datasets

Manage who can access and interact with your Unregistered Datasets by easily setting access control and permissions in just a few clicks.

On this screen, you have the ability to make changes to your dataset information. Here's what you can do:

- **Change Display Data Set Name:** You can modify the name of your dataset that will be visible to potential data collaboration partners. Simply enter the desired name.
- **Update Profile Description:** Provide a brief description of your dataset that will be visible only to your company's team members. This helps them understand the contents of the dataset.
- **Field Descriptions and Permissions:** Edit field descriptions to provide more detailed information about each column or field in your dataset. Specify whether a field can be used in future overlap analysis or data exchange, and define which public clients can access it.
- You can delete a dataset.

Troubleshooting – Common Problematic Text File Types

- The number of columns in the header must match the columns in the rows.
- Make sure that the delimiter isn't found in the text, eg. a command in an address, when the file is comma-delimited.
- Make sure the file contains a header row.
- Make sure the headers doesn't contain iURN and error column names.
- Make sure the headers doesn't contain blank fields.
- The headers needs to be unique.
- No special characters to be found in headers.

The Omnisient Web App

Manage datasets, audit trails, overlap analysis, connections, ACE Reports, and more,

- The Omnisient Web App allows you to perform the following functions:
- Manage your datasets, user access and permissions.
- Monitor your Omnisient environment – view audit trails about activity on your account.

- Carry out overlap analyses with multiple partner datasets or with publicly available datasets.
- Create connections by inviting a specific company to partner with you, allowing you and people from the invited company to share selected datasets, view overlaps and agree and execute data exchanges.
- Request, View and Edit ACE reports (obtaining analytical insights for selected audiences).

Projects

Exciting news! We're delighted to introduce a new feature that adds a layer of transparency to your project management experience. With this update, you can now easily access the precise time and date when a project was created.

Instructions:

- Navigate to your project list or dashboard.
- As you review your list of projects, you'll notice a new addition: the creation timestamp.
- The creation timestamp will display the exact time and date when each project was initiated.

Benefits:

- Enhanced Visibility: Gain a deeper understanding of your project history by knowing when each project was created
- Improved Organization: Effortlessly keep track of project timelines with clear creation timestamps.

Experience the convenience of this new feature as you manage your projects. By having instant access to creation timestamps, you can stay well-informed and organized, making your project management journey even more efficient.

Projects

Before running any of the projects, ensure that the datasets that will be used as part of that project are registered. To do this follow the steps below:

- Under datasets, go to view datasets.
- If it is your dataset, go under unregistered and then click the register button. Give your datasets a friendly name or use the dataset name as a friendly name. Select your customer identifier, and confirm iURN (representing a unique row number). The description portion is optional, but you might find it helpful to fill it in.
- If it is a dataset shared with you, go under Partner Datasets accept the dataset under actions. The registration will have been done by the data sharer.

Once relevant datasets have been registered you may then go to projects.

Navigation to projects:

- Projects
- Project dashboard
- Create

- d. Select your project template

ACE PROJECTS

ACE – This is a project that overlaps your dataset with strive universe's data. Steps:

- Select ACE and the click use template button.
- Name your project (e.g. Microsoft ACE project). The description is optional, then next.
- Under Own table details, add your registered table from the drop down.
- On select match field, if your data is a mixture of PII fields use best match as recommended, else if your dataset has IDs for everyone deselect use best match for faster processing time. Either way you can always use best match. Then submit.
- After you have booked your project email to your assigned account manager from the omniscient side to approve your project.
- Once your project is available, you will find it listed under projects dashboard.
- To view the ACE report, click on the project, go under reports and click edit to filter the report with fields you are interested in. (All) is the default filter selection for every field.
- The report will have four tabs, namely : Overlap, Client Market Penetration, Customer Location, Customer Profile (Demographics), Customer Profile (LifeStyle), Customer Profile (Career) (These tabs are explained in the current user guide)

Collaborative ACE

A project that overlaps your data, your data partner's data, and strive universe's data.

Steps:

- Select Collaborative ACE and the click use template button.
- Name your project (e.g. Bank A and Retailer B ACE project). The description is optional, then next.
- Under Own table details, add your registered table from the drop down.
- On select match field, if your data is a mixture of PII fields use best match as recommended, else if your dataset has IDs for everyone deselect use best match for faster processing time.
- Under shared table details, select the table shared with you by your data partner. Then you will submit your booking
- After you have booked your project email to your assigned account manager from the omniscient side to approve your project.
- Once your project is available, you will find it listed under projects dashboard.
- To view the ACE report, click on the project, go under reports and click edit to filter the report with fields you are interested in. (All) is the default filter selection for every field.
- Your report will have four tabs, namely : Overlap, Client Market Penetration, Customer Location, Customer Profile (Demographics), Customer Profile (LifeStyle), Customer Profile (Career)

Overlap

This is a project that shows overlap between two companies. This is completed in the user guide

Financial Inclusion

This is a project to move data into a project that collaborating partners can work in. It runs K-anonymization to anonymize identifiable personally fields before moving data into projects. Furthermore, it adds a dataset with Shoprite features on customers that overlap with Shoprite's base.

Steps:

- Email of the Omnisient account managers to grant access to the project template
- Once you have access to Financial inclusion project go to the projects dashboard and start it by the clicking use template button.
- Name your project (e.g. Bank Financial project). The description is optional, then next.
- Under Own table details, add your registered table from the drop down.
- After you have booked your project email to your assigned account manager from the omnisient side to approve your project.
- Once your project is available, you will find it listed under projects dashboard with the project status 'active'.
- To see your datasets click on the project and you should see a list including:
 1. Your_table_name_FI
 2. Your_table_name_FI_SH_Features
 3. Your_table_name_FI_Kanon_Report
 4. Your_table_name_Columns_to_round
- You can see the same list of tables when you 'open with' and go to sql pad.
- If you have jupyter notebook subscription you may import your data into your notebook using python and a few omnisient commands (omni_hub commands)

Streamlined Customer ID Selection: Pre-selection for Enhanced Efficiency

We're thrilled to introduce a new enhancement to the Customer ID selection step in Projects! Now, when a customer ID is already known for a table, it will be pre-selected, offering you a more efficient and seamless experience.

Select Dataset

BGV2MD240730B

Don't see your dataset? Click [here](#) ?

Customer Identifier

iURN

Select Match Field

Instructions:

1. Navigate to the Customer ID selection step within your Projects.
2. As you proceed with this selection, if a customer ID is already associated with the table, you'll notice it's pre-selected by default.

Benefits:

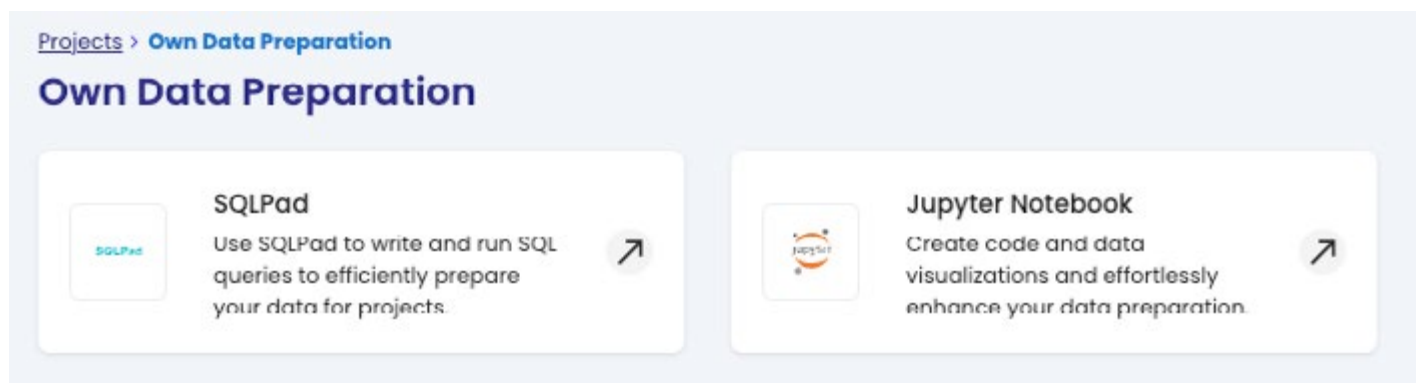
- Time-Saving Convenience: Eliminate the need to manually select a known customer ID, saving you time and effort
- Enhanced Accuracy: Ensure precision in the selection process, reducing the chances of errors.
- Experience the efficiency of the pre-selected customer ID feature in the Projects. As you move forward with your selections, rest assured that known customer IDs will be automatically chosen, simplifying your workflow and optimizing your experience.

Mastering the Own Data Preparation Project Feature in Omnisient Platform

The Own Data Preparation project feature in the Omnisient Platform empowers users to manage their data more effectively. This article guides you through the process of accessing and utilizing this feature to prepare your data using SQL Pad and the upcoming Jupyter Notebook integration. This guide is intended for users looking to optimize their data management and analysis experience on the Omnisient platform.

Prerequisites

Before starting, ensure you have an active Omnisient account and access to the platform. Familiarity with data management concepts and tools like SQL Pad and Jupyter Notebook is helpful but not required.



Step-by-step instructions

1. Log in to your Omnisient account and navigate to the main dashboard.
2. Locate the left side navigation menu and click on "Own Data Preparation" or visit this link:
3. <https://app.omnisient.com/projects/own-data-preparation>
4. In the Own Data Preparation section, you will find two primary data preparation tools: SQL Pad and Jupyter Notebook .
5. To use SQL Pad for data preparation, follow these steps:
 - ◇ Click on "SQL Pad" to open the query editor
 - ◇ Write SQL queries to manipulate and transform your raw encrypted data into structured tables.

- ◊ Execute the queries by clicking on the “Run” button and review the results.
 - ◊ Save your Available Datasets as tables for further analysis or reporting.
6. Keep an eye out for the upcoming Jupyter Notebook integration, which will provide an additional option for data preparation in a more interactive and versatile environment.

Tips and best practices

- Regularly review and update your data preparation processes to ensure data quality and consistency.
- Invest time in learning SQL and Jupyter Notebook to maximize the efficiency and accuracy of your data preparation tasks.
- Maintain clear documentation of your data preparation steps and queries for future reference and collaboration.

Troubleshooting

- If you encounter issues executing queries in SQL Pad, ensure your query is formatted correctly and adheres to SQL syntax rules. Consult SQL documentation if needed.
- For any other issues or concerns, contact Omnisient support for assistance.

New Project Template: Overlaps

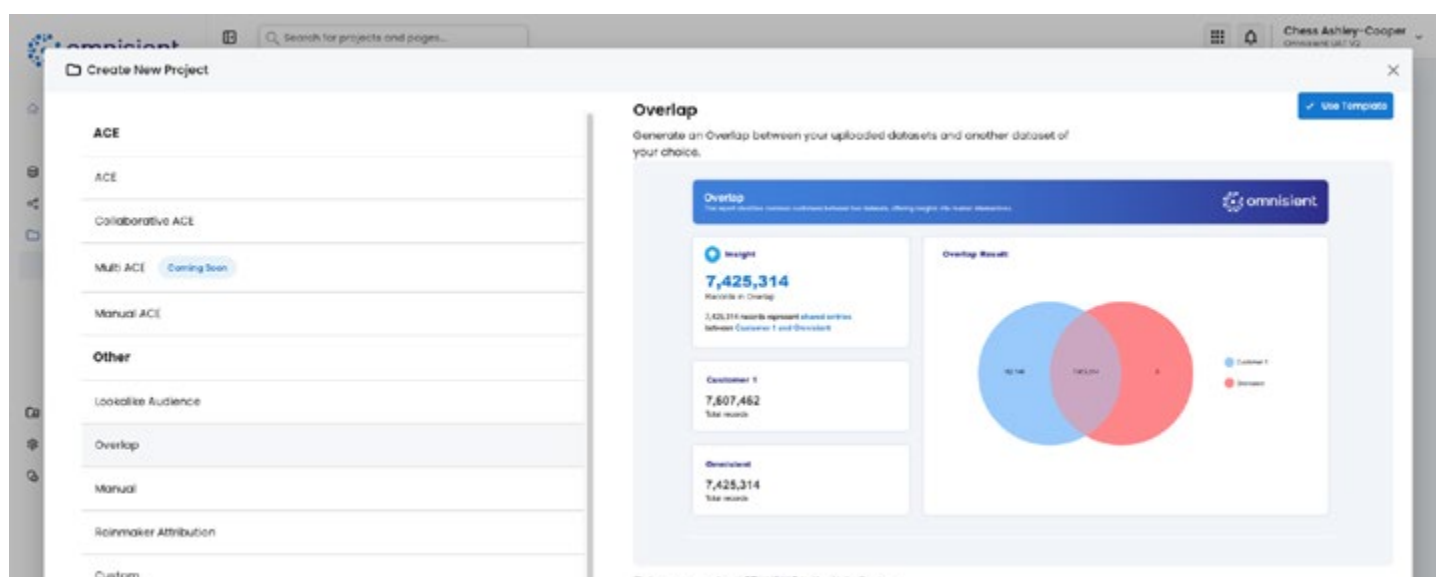
We’re excited to announce the latest updates and improvements in this release. The following enhancements and bug fixes have been made to ensure a better user experience:

Unveiling the Overlap Project Template in the ‘Projects’ Section

Introducing a fresh addition to your project-creation journey: the Overlap Project template.

Now, whenever you tap on ‘Create New Project’, you’ll see a window showcasing available project templates.

An Overlap Project in the Omnisient platform is a project type designed to analyze and identify commonalities or overlaps between datasets from different sources, enabling secure and privacy-compliant data collaboration. This type of project is particularly useful for businesses seeking to uncover shared customer bases or potential partnership opportunities without exposing Personally Identifiable Information (PII).



Your choices have expanded! You can now opt for either an ACE project or dive into an Overlap Project.

Upon selecting the Overlap Project, you'll be welcomed by a brand new 'Overlap Project' window.

In the Overlap Project window, you'll find a section displaying your currently available datasets in a tabular view. Feel free to choose the datasets you'd like to overlap.

Moreover, the window also contains a section showcasing available data collaborations from other sources, broadening your project's potential.

Please refer to the product documentation for more information on these updates and features. As always, we appreciate your feedback and encourage you to reach out to our support team for any assistance.

Full Data Control

We're excited to announce the latest updates and improvements in this release. The following enhancements and bug fixes have been made to ensure a better user experience:

Handling Tables and Assets

Table Removal

This feature handles the eradication of all tables.

Asset Purge

This function allows for the complete removal of all assets.

Asset Protection

This option is responsible for securing all your assets.

Asset Refresh

This operation enables the renewal or updating of all assets in your system.

As an administrator, you'll be promptly notified via email whenever a shared dataset is locked.

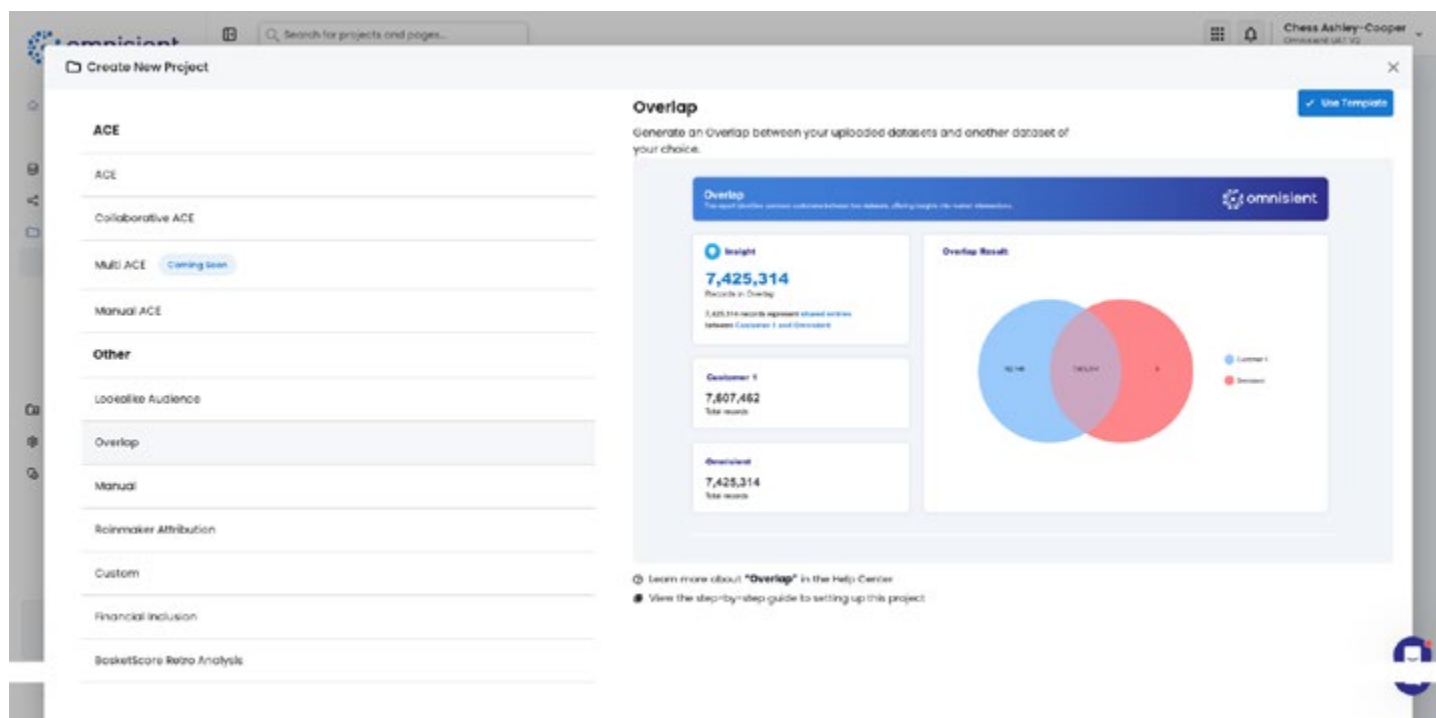
Please refer to the product documentation for more information on these updates and features. As always, we appreciate your feedback and encourage you to reach out to our support team for any assistance.

Book An Overlap Project

Welcome to our platform! We've made it simple for you to book an overlap between your uploaded datasets and another dataset of your choice. Here's a user-friendly guide on how to do it:

Prerequisites

You need to have uploaded a dataset, and have created a collaboration between you and another partner.



1. Navigate to the menu and locate the “Projects” section. This is where you’ll find helpful templates and analysis tools.
2. Look for the “Overlap Template” and select it. This template is specifically designed to assist you in selecting datasets for overlap analysis.
3. Once you’ve accessed the template, you’ll be guided through the steps of the Overlap Project. Follow these steps carefully to ensure a successful overlap analysis.
4. In the template, you’ll find a list of your uploaded datasets. Take your time to review the options and select the dataset you wish to include in the overlap analysis.
5. You now need to select your Customer Identifier.
6. Next, you’ll need to indicate the shared dataset that you want to compare with the selected dataset. This comparison will help identify any overlapping data points.
7. After confirming your selections, the system will automatically schedule the overlap between the chosen datasets. This ensures that the analysis is performed according to your preferences and within the specified timeframe.

That’s it! The system will now process the overlap analysis, generating insightful results based on the datasets you’ve selected. If you have any questions or require further assistance during the process, don’t hesitate to ask. We’re here to provide a user- friendly experience and support you every step of the way!

Introducing the New Projects Feature in Omnient

This article introduces the new Projects feature in Omnient, which provides users with greater control, flexibility, and self-service capabilities. Learn how to navigate the feature and create new projects using the available templates.

Prerequisites

- Access to the Omnient web app: <https://app.omnient.com>

Step-by-step instructions

Access the Projects feature:

Open the Omnisent web app and navigate to the Projects tab in the top bar.

The left-side navigation menu displays the main sub-menus for Projects:

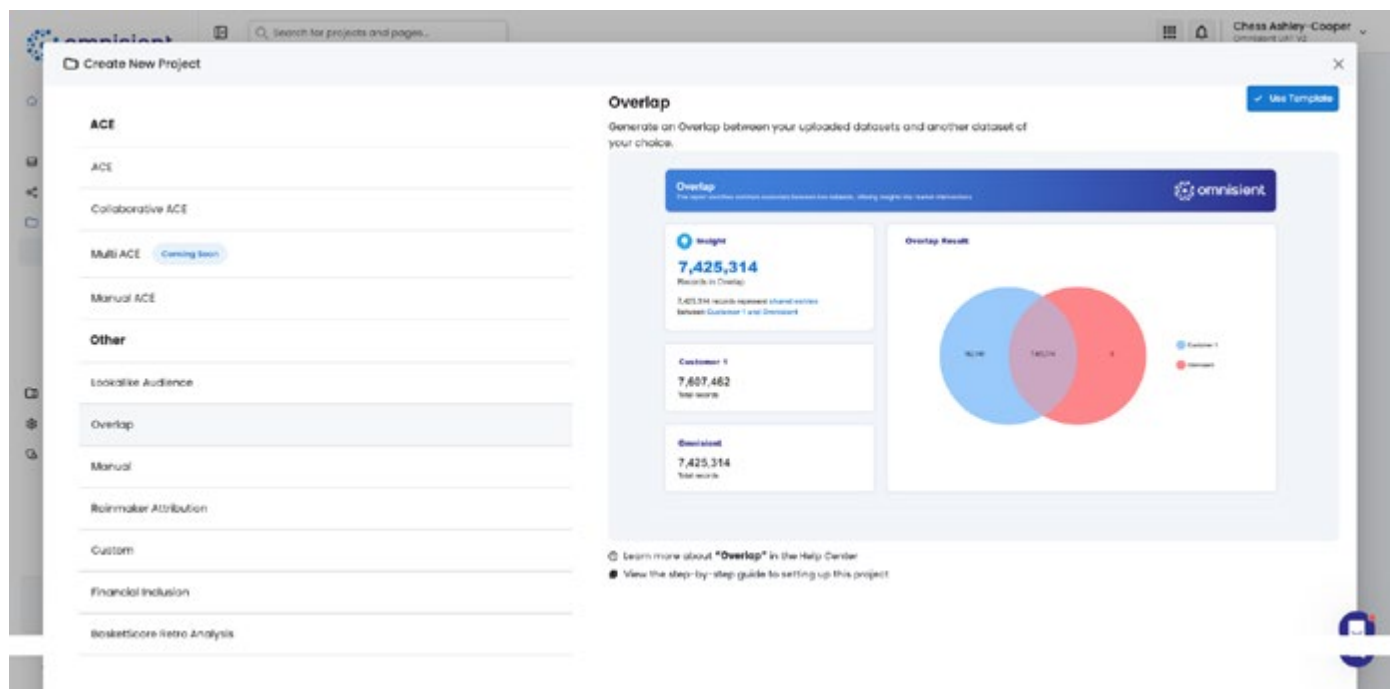
- Project Dashboard
- Create New
- View Projects
- Own Data Preparation
- Legacy ACE Reports
- Legacy ACE Selections
- Legacy Overlaps

Explore the Project Dashboard:

The Project Dashboard displays recent projects and tools for preparing your data with SQL Pad or Jupyter Notebook .

Browse suggested project templates:

- ACE Project Template
- Collaborative ACE Project Template
- Manual ACE Project Template
- Overlap Project Template
- Blank Project
- Financial Inclusion Project
- Custom Project



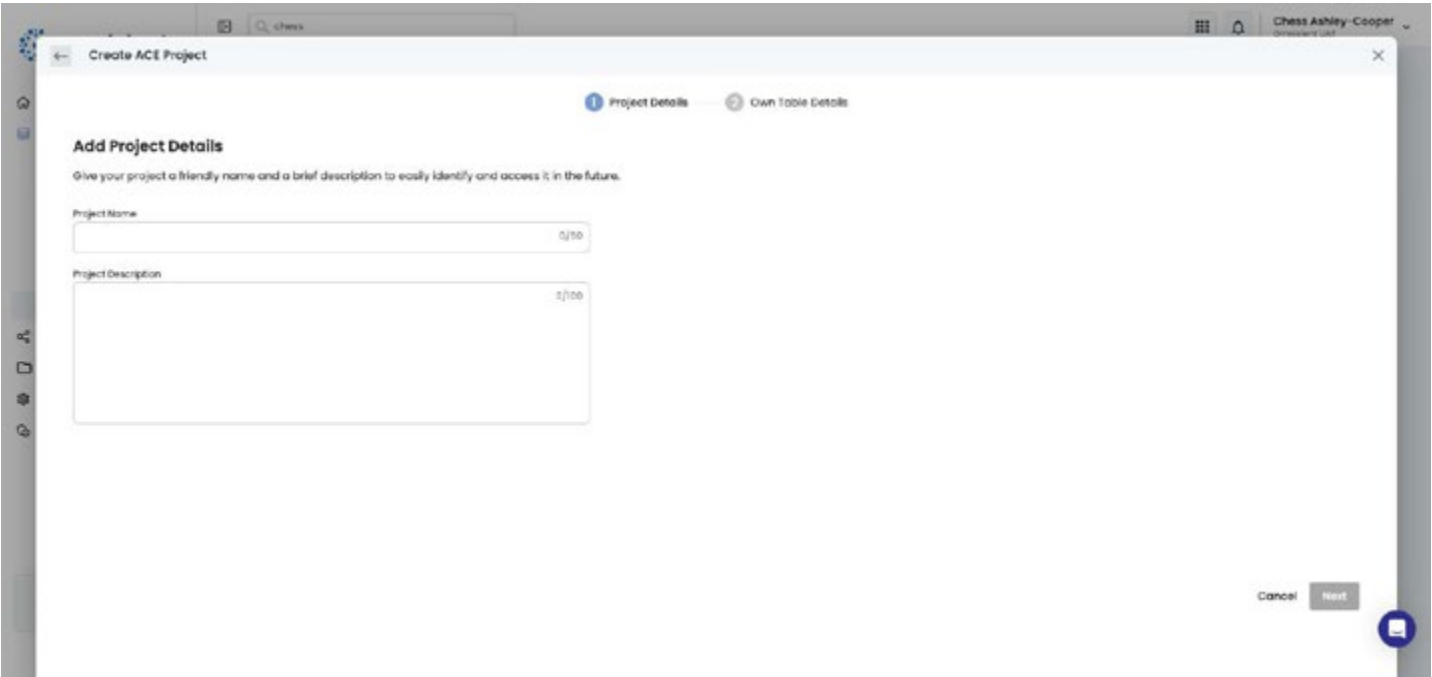
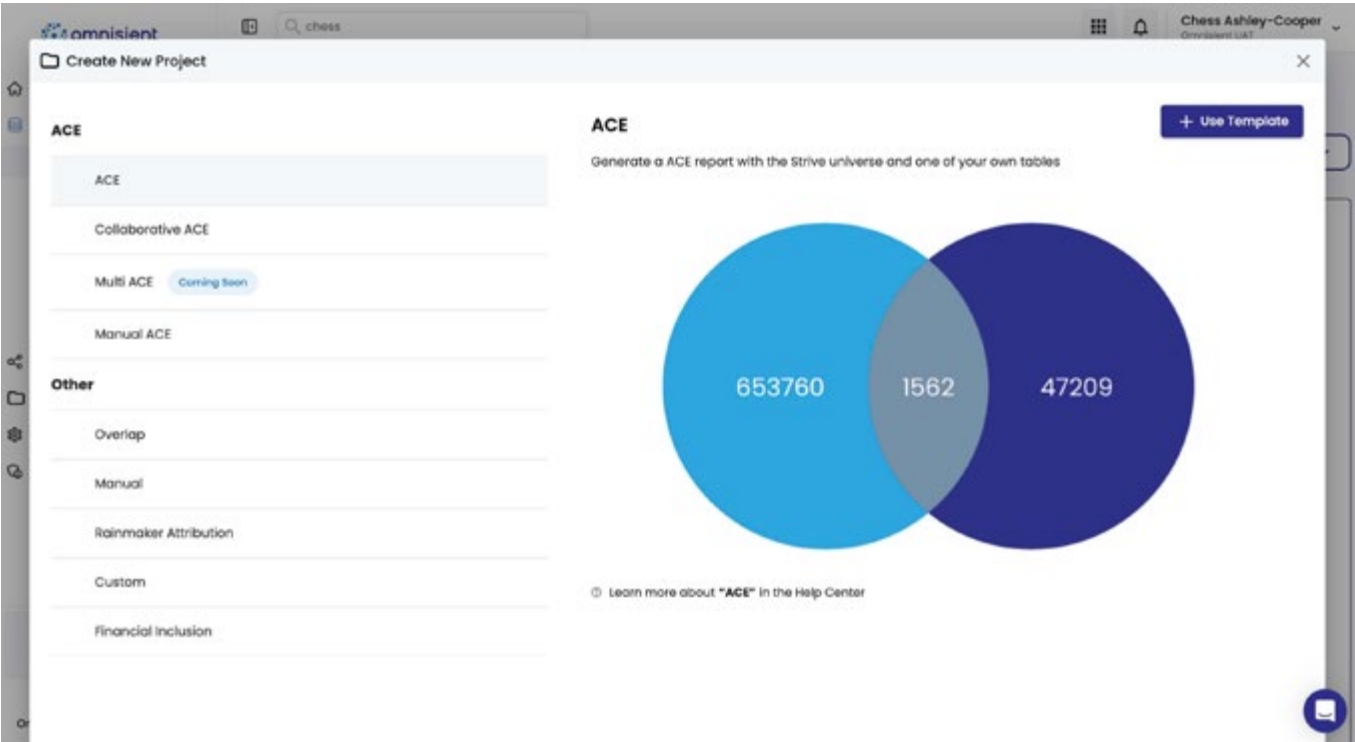
Create a new project:

Click "Create New" in the left-side Projects navigation menu.

If necessary, use SQL Pad to prepare your datasets before selecting a Project Template. Choose a

Project Template to initiate project creation.

If you select an ACE Project template, a popup will appear where you can add your Project Name and Project Description.





Own Data Preparation:

If needed, use SQL Pad or Jupyter Notebook to prepare your datasets before choosing a Project Template.

[Projects](#) > [Own Data Preparation](#)

Own Data Preparation

**SQLPad**
Use SQLPad to write and run SQL queries to efficiently prepare your data for projects.

**Jupyter Notebook**
Create code and data visualizations and effortlessly enhance your data preparation.

Book an ACE Report

What is an ACE Report?

An ACE Project, short for Anonymised Campaign Engine Project, is a feature on the Omnisient platform designed to enable users to analyze and execute secure and privacy-compliant campaigns using anonymized data. It leverages Omnisient's extensive data universe, including credit bureau, deeds, CIPC, and other data sources, to provide insights for audience profiling, targeting, and campaign execution without exposing Personally Identifiable Information (PII).

Key Features:

Privacy-Focused Campaigns: Allows users to target and execute campaigns while staying POPIA and GDPR compliant.

Advanced Audience Profiling: Users can select specific audience parameters based on anonymized datasets.

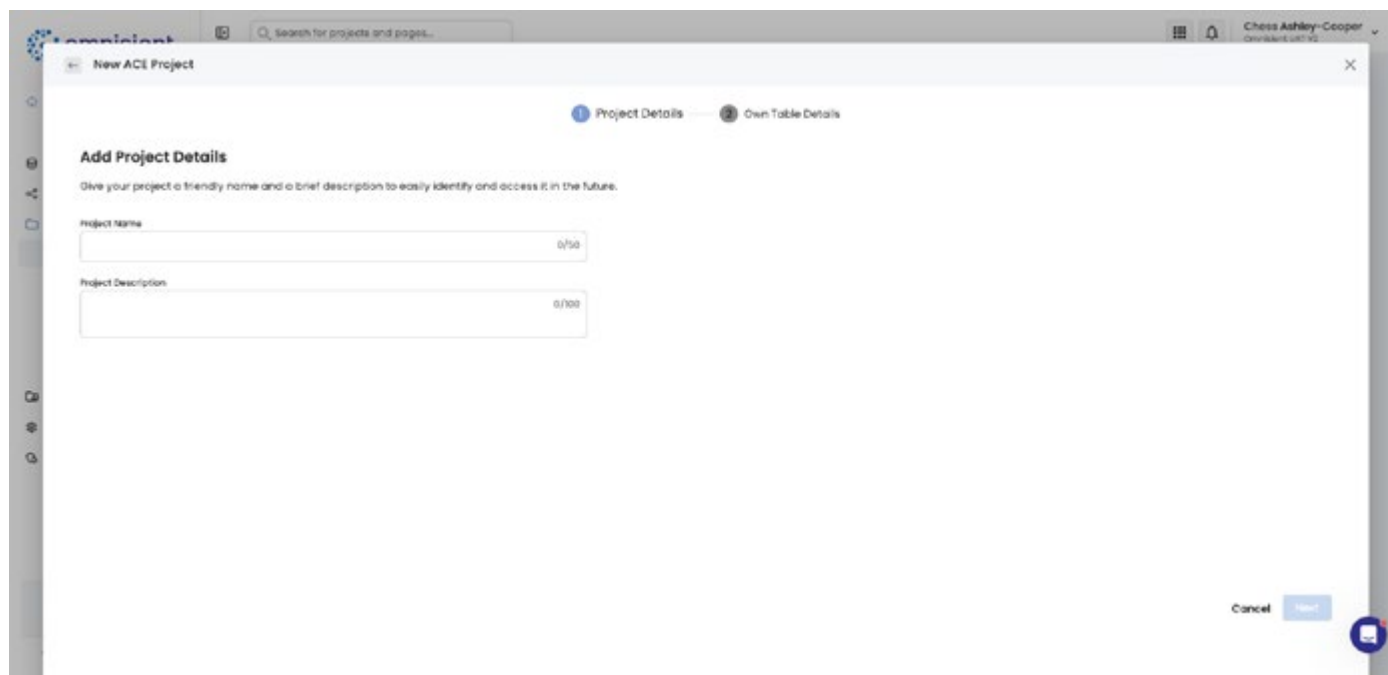
Collaboration: Enables overlap and joint data analysis with partners securely.

Template-Based Execution: Offers project templates like ACE and Overlap for ease of setup.

Insights Delivery: Generates detailed reports, including demographics, market penetration, and customer profiles.

The ACE Project functionality facilitates data collaboration, providing a robust and secure mechanism for deriving actionable insights and creating impactful marketing campaigns.

How do I book an ACE Report?



The booking of an ACE Report is a request to the system to compare your dataset to the ACE “universe” of data which contains credit bureau data, deeds information, CIPC & Home Affairs information, and other marketing data, and to prepare a report with various pages of analyses and insights of your dataset(s) against this universe.

Prerequisites

You need to have uploaded a dataset, and have created a collaboration between you and another partner.

1. To book a report, select PROJECTS then CREATE NEW from the sidebar menu:
2. You can then Select ACE PROJECT from the templates.
3. You will now be guided through the stepper on how to set up your report.
4. Pick a name and description for your booking.
5. Follow the wizard and click SUBMIT.

Your ACE Analysis booking will now be logged, and an automatic email will be sent to your Account Manager who will follow up with you and ensure that the desired ACE project is delivered on the platform.

Auto ACE Report: Extracting Your Dataset Fields

Discover an exciting capability within the Auto ACE Report! In addition to its comprehensive insights, this report empowers you to extract fields from your own dataset.

Instructions:

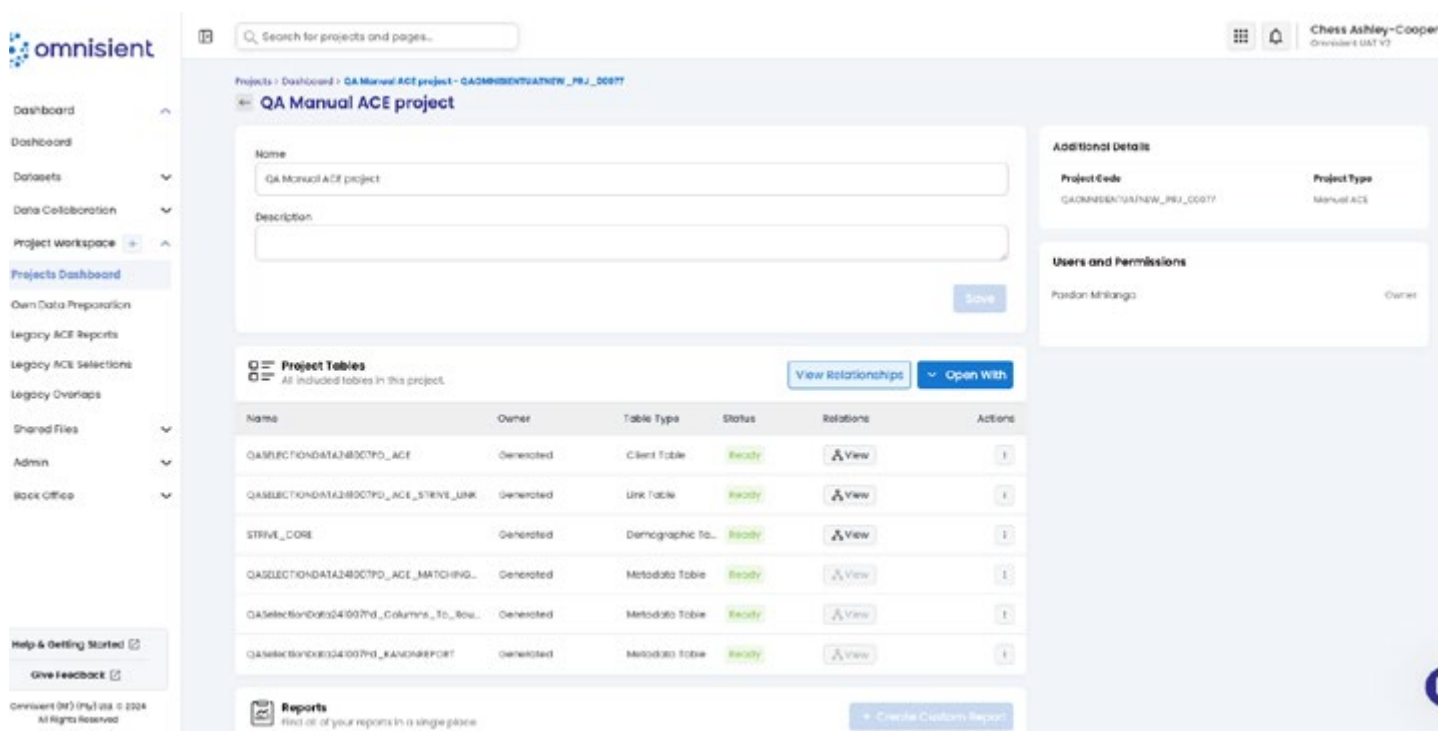
1. Access the Auto ACE Report from your dashboard.
2. Navigate through the report to locate the section relevant to your own dataset.
3. Within this section, you'll find the option to extract fields directly from your dataset.

4. Click on the extraction option to initiate the process.

Benefits:

- Enhanced Customization: Tailor your Auto ACE Report by extracting fields from your own dataset.
- Streamlined Insights: Enjoy a holistic view of insights combined with your specific dataset information.

Experience the convenience of extracting your dataset fields within the Auto ACE Report. Customize your insights and enrich your reporting experience like never before.



ACE Selections

Welcome to the module where you take the reins!

It's designed to help you tailor an audience according to your specific needs. Once you've refined your selection, you can either download it for your personal utilization or pass it on to Strive for executing a targeted campaign on your behalf

As a beginner, here's what you'll see on the Selection page before making any choices:

Divided by a subtle grey vertical line, the screen is split into two.

On the left, you'll find the various selection criteria available in your client dataset. These are the factors you can use to define your audience.

On the right, you'll discover Strive's criteria that can be applied to your data.

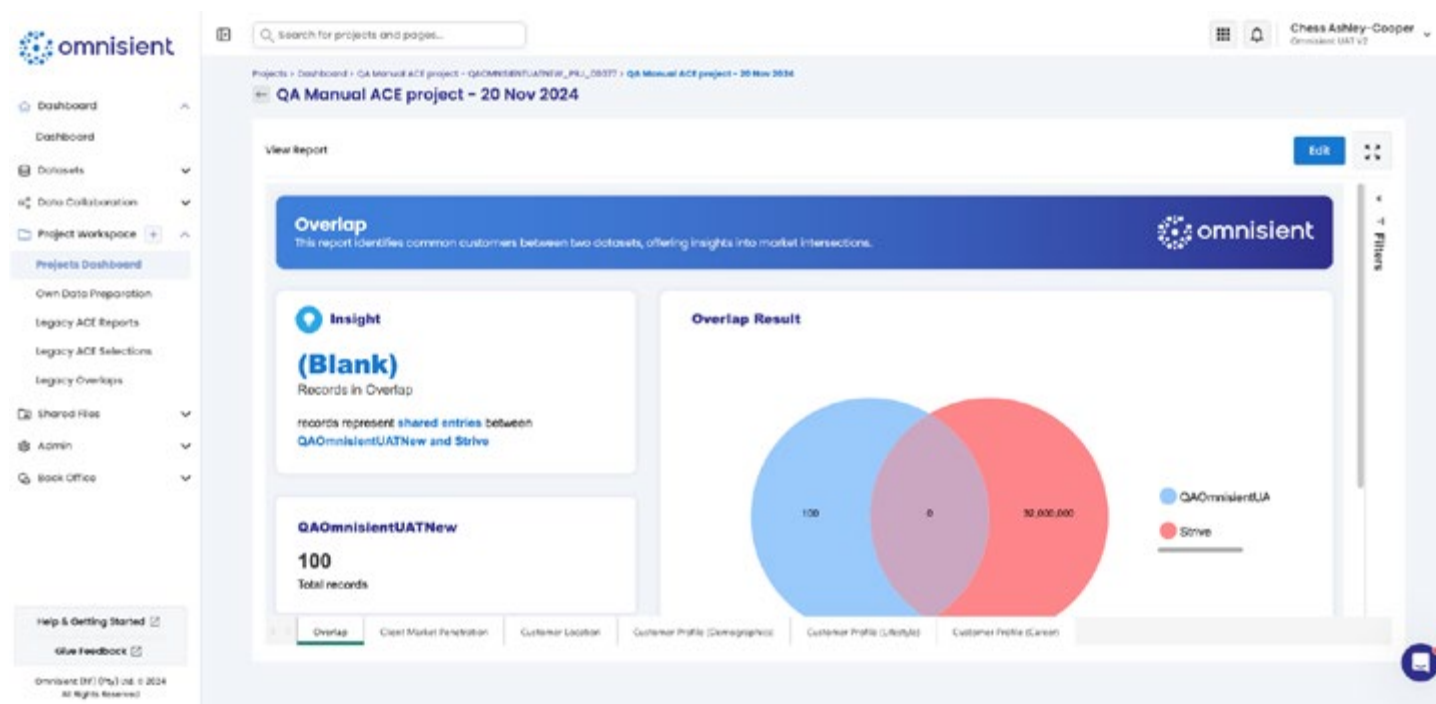
This additional layer helps you narrow down your audience selection even further.

In a nutshell, you have all the tools you need to refine your audience just the way you like.

Let's start crafting!

ACE View Report: Tab 1 – Overlap

The Booked ACE report is an example of the reports that can be prepared – we also prepare custom reports for our customers as required – please contact your Account Manager for further information.



ACE View Report: Tab 2 – Client Market Penetration

Introduction: In this section, we will explore Tab 2 of the report, which provides valuable insights into market penetration and remaining opportunity within predefined Age and Income brackets.

Target Audience: Users, analysts, and decision-makers interested in understanding market penetration and identifying growth opportunities.

Step-by-step instructions:

1. Open the report and navigate to Tab 2.
2. On Tab 2, you will find a graphical representation of the current market penetration against the Strive Universe.
3. The graph visually displays the extent to which your company has penetrated the market compared to the total potential within the Strive Universe.
4. Additionally, the graph highlights the remaining opportunity that exists within predefined Age and Income brackets.
5. Take note of the Age and Income brackets shown on the graph.
6. Analyze the data to identify areas with untapped potential for growth and expansion.
7. Consider the insights provided by this graphical representation to inform your strategic decisions and optimize your market penetration efforts.

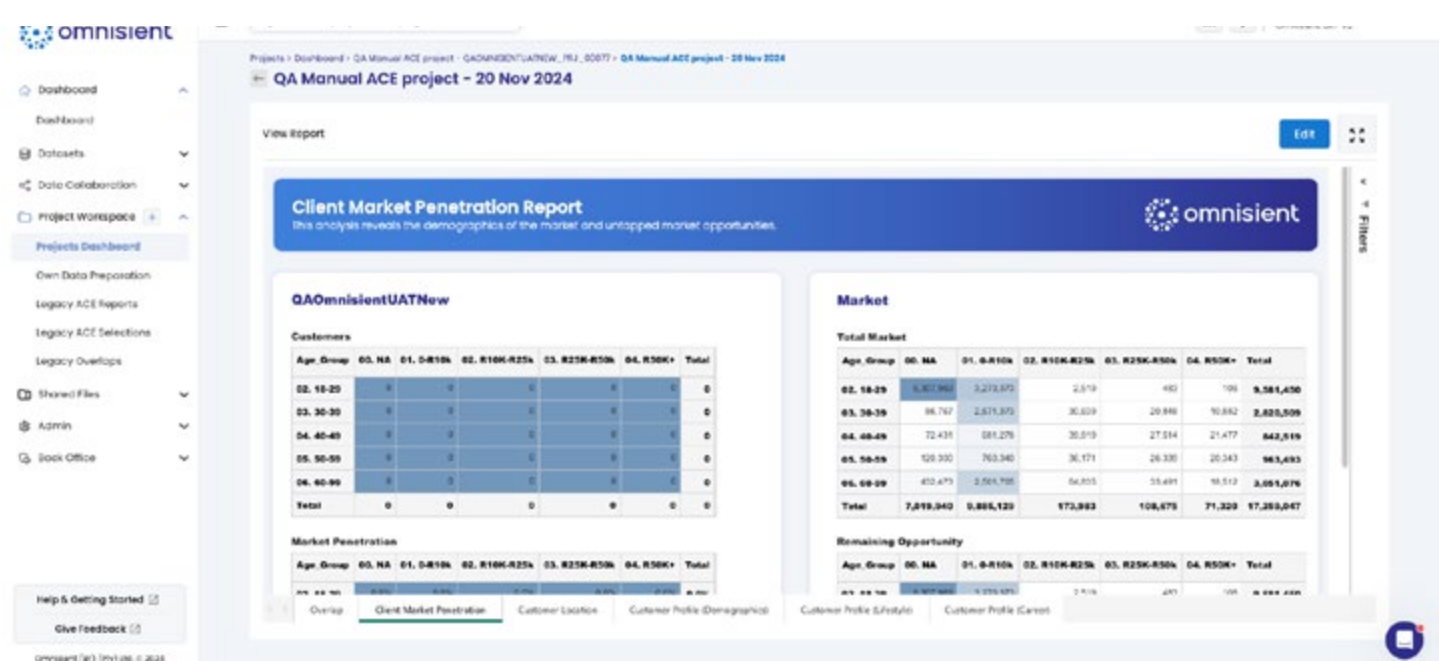
Tips and best practices:

- 1. Use the market penetration graph as a visual aid to understand your company’s performance in reaching specific target demographics.
- 2. Focus on Age and Income brackets with significant remaining opportunity to guide your marketing and expansion strategies.
- 3. Regularly review and compare market penetration data over time to track progress and adjust your approach accordingly.

Troubleshooting (if applicable):

If you encounter any difficulties accessing or interpreting the market penetration graph on Tab 2, refer to the help center’s specific article on troubleshooting report navigation or reach out to our support team for assistance.

By following these instructions, you can easily explore Tab 2 of the report and gain insights into market penetration and the remaining opportunity within predefined Age and Income brackets. Utilize this information to make informed decisions and optimize your company’s growth strategy.



ACE View Report: Tab 3 – Customer Profile (Demographics)

Analyzing Demographic Insights on Tab 3

Introduction: In this section, we will explore Tab 3 of the report, which provides valuable analyses on Age, Gender, Marital Status, Province, and Parental Status compared to the Strive Universe.

Target Audience: Users, analysts, and decision-makers interested in understanding demographic insights and their impact on business strategies.

Step-by-step instructions:

1. Navigate to Tab 3 on the report page.
2. Once on Tab 3, you will find a comprehensive analysis of various demographic factors against the Strive Universe.
3. Scroll up and down on the page to explore different analyses related to Age, Gender, Marital Status, Province, and Parental Status.
4. Each analysis provides insights into how these demographic factors compare to the broader Strive Universe.
5. Pay attention to any trends, patterns, or significant differences that stand out in each demographic analysis.
6. Analyze the data to understand the implications for your business strategies and decision-making processes.
7. Consider the actionable insights gleaned from these analyses to tailor your marketing campaigns, target specific demographic segments, and optimize your overall approach.

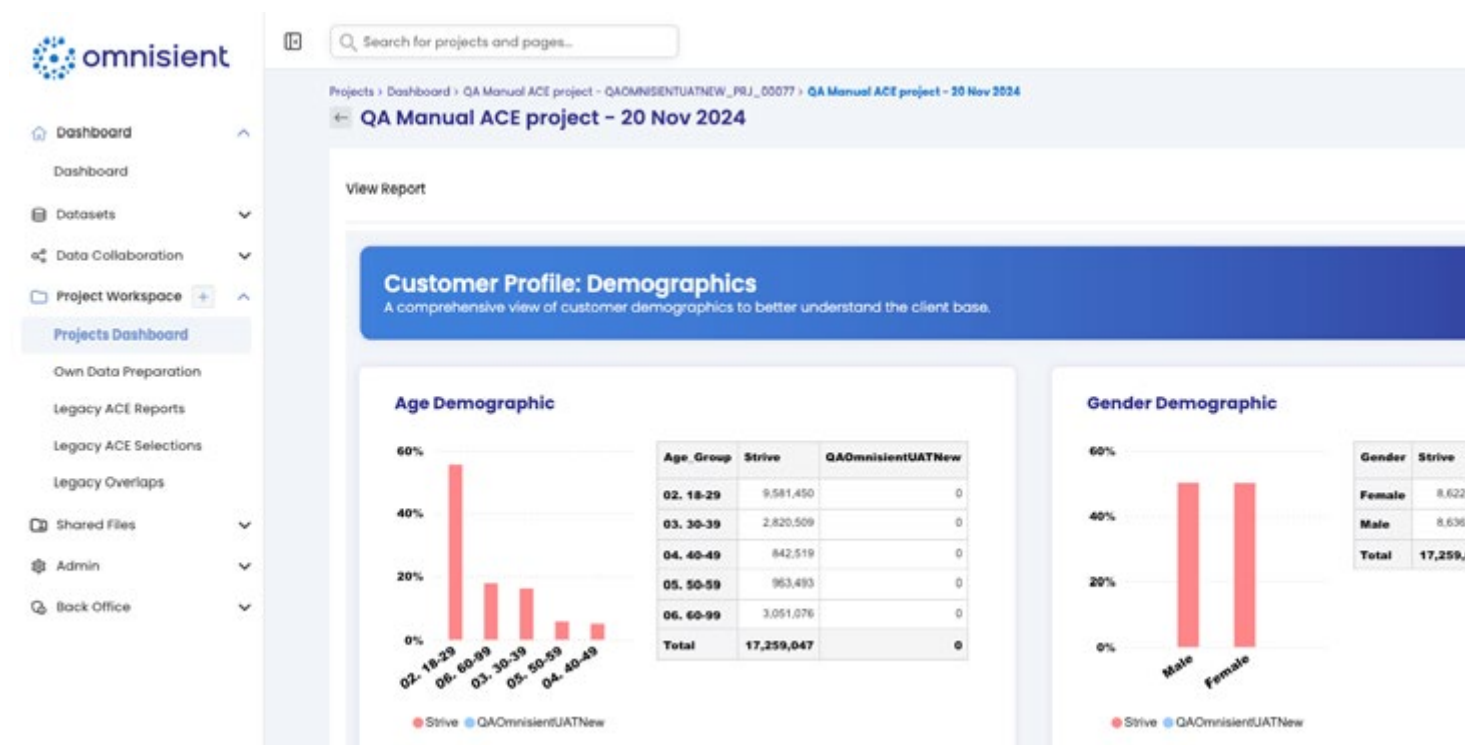
Tips and best practices:

- Take note of any demographic groups that exhibit strong performance or present untapped potential for your products or services.
- Identify any discrepancies between your target audience and the Strive Universe to guide your marketing and advertising efforts.
- Use the demographic analyses to refine your messaging, promotions, and product offerings to better resonate with your desired customer segments.

Troubleshooting (if applicable):

If you encounter any difficulties scrolling or accessing specific demographic analyses on Tab 3, refer to the help centre's troubleshooting guide for report navigation or reach out to our support team for assistance.

By following these instructions, you can easily explore Tab 3 of the report and gain valuable insights into various demographic factors such as Age, Gender, Marital Status, Province, and Parental Status. Utilize these insights to inform your business strategies, optimize targeting, and drive meaningful engagement with your target audience.



ACE View Report: Tab 4 – Customer Profile (Lifestyle)

Discover valuable lifestyle insights on Tab 4 of the ACE report. This section provides an analysis of property value and vehicle ownership compared to the Strive Universe.

Target Audience: Users, analysts, and decision-makers interested in understanding lifestyle-related data and its impact on business strategies.

Step-by-step Instructions:

1. Access the ACE report page and navigate to Tab 4.
2. On Tab 4, you will find detailed analyses of lifestyle factors, specifically property value and vehicle ownership.
3. Explore the comparison between these lifestyle indicators and the broader Strive Universe.
4. Take note of the insights presented, highlighting any variations, trends, or significant differences in property value and vehicle ownership.
5. Analyze the data to gain a deeper understanding of how these lifestyle insights can inform your business strategies and decision-making.
6. Utilize the findings to refine target audience segmentation, customize marketing campaigns, and enhance product or service offerings.

Tips and Best Practices:

- Identify lifestyle segments that align with your target market based on property value and vehicle ownership. Tailor messaging and promotions to resonate with specific lifestyle segments.
- Consider lifestyle factors when developing pricing strategies or launching new products/services.
- Leverage the insights to enhance customer profiling and refine your overall marketing and sales approaches.

Troubleshooting (if applicable):

If you encounter any issues accessing or interpreting the lifestyle insights on Tab 4, refer to the help centre's troubleshooting guide for report navigation or reach out to our support team for assistance.

By following these instructions, you can effectively explore Tab 4 of the ACE report and gain valuable insights into lifestyle factors such as property value and vehicle ownership. Utilize these insights to optimize your marketing strategies, refine audience targeting, and align your offerings with the preferences and behaviors of your desired customer segments.

ACE View Report: Tab 5 – Customer Profile (Career)

Take a tour of the career-centric customer profile in the ACE View Report, located in Tab 5.

This section displays detailed graphical insights into Directorship and Pay Type categories, such as Blue Collar, White Collar, and Government Employee.

View ACE Report in detail

Explore detailed views of the data in the report by navigating through various tabs located at the bottom:

- Overlap
- Client Market Penetration
- Customer Profile (Demographics) Customer Profile (Lifestyle)
- Customer Profile (Career) Client Look-alike Audience

Simply click on each tab to access specific insights and information related to that category.

View an ACE Report

To access ACE Reports, follow these user-friendly steps:

1. Click on the “Projects” menu link.
2. From the list of projects, select the specific project you want to view.
3. You will be redirected to the detailed page of the selected project.
4. On the project page, locate the dropdown menu.
5. Click on the dropdown menu to expand it.
6. From the options available in the dropdown menu, select “View” to access the reports associated with the project.
7. The report will be displayed, allowing you to analyze and review the relevant data.

By following these steps, you can easily navigate to ACE Reports, view project-specific reports, and gain valuable insights from the data.

Transforming Partnerships with Omnisient Anonymised Campaign Engine.

The Omnisient Anonymised Campaign Engine (ACE) revolutionizes the way our clients evaluate and establish partnerships.

ACE harnesses our extensive data universe, including credit bureau data, deeds information, CIPC & Home Affairs data, and marketing data, to evaluate the value and synergy of potential partners.

By utilizing a common denominator, ACE enables powerful analysis and campaign execution by understanding demographics, affluence, and customer life stages across both parties.

With the Omnisient Platform, there’s no need to exchange datasets for marketing or insights when executing campaigns with partners. Our platform eliminates the requirement for physical data sharing, enriching the data with ACE insights to facilitate targeted campaign execution.

Enjoy the benefits of joint campaign planning and execution while maintaining privacy, gaining valuable insights, and leveraging advanced targeting capabilities.

In summary, the Omnisient Platform empowers our clients with privacy, insights, and enhanced targeting capabilities to unlock the true potential of collaborative partnerships.

Data Collaboration

Enhanced Dataset Collaboration Tracking

We are excited to introduce an effortless way to keep track of your dataset collaborations! With our latest update, monitoring sharing details of datasets is now simpler than ever.

Instructions:

1. Access the Registered Datasets screen from your account dashboard.
2. Locate the dataset you are interested in.
3. Click on the number displayed next to the dataset, indicating how many times it has been shared.
4. Instantly, a convenient popup will appear, revealing comprehensive sharing details of the dataset.
5. The popup will include a list of all the companies with whom the dataset has been shared.

Benefits:

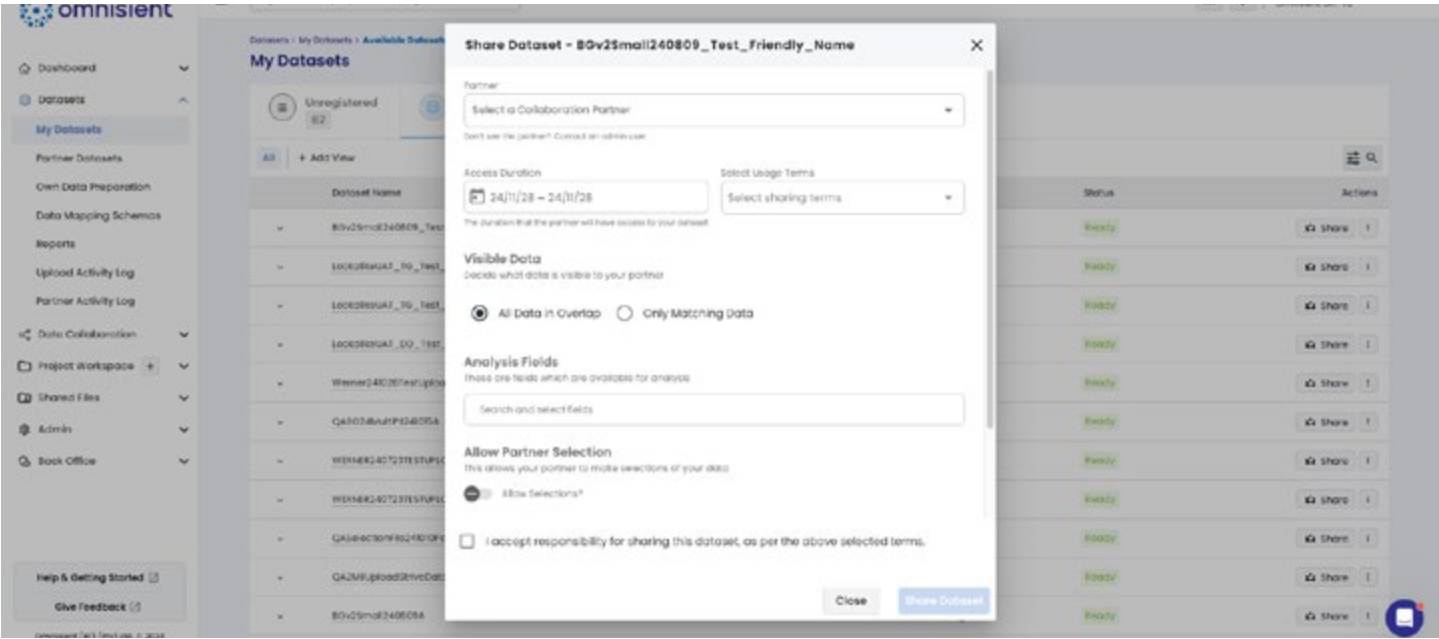
- Enhanced Transparency: Easily access all sharing details for improved dataset transparency.
- Improved Collaboration: The feature fosters better collaboration opportunities with other companies.

With this feature, staying informed about dataset collaborations is hassle-free. Track sharing details with a simple click, and enhance transparency and collaboration opportunities for your datasets.

Exploring Dataset Sharing Details on Registered Datasets Screen

On the Registered Datasets screen, you have the ability to access the sharing details of a dataset

On the Registered Datasets screen, you have the ability to access the sharing details of a dataset by clicking on the number indicating how many times it has been shared. This action will display a popup that contains a list of the companies with whom the dataset has been shared, providing transparency and facilitating collaboration.



Instructions:

1. Navigate to the Registered Datasets screen.
2. Locate the dataset you are interested in.
3. Identify the number displayed next to the dataset, indicating how many times it has been shared.
4. Click on the number to view the sharing details.
5. A popup will appear, displaying a list of companies with whom the dataset has been shared.

Tips and Best Practices:

- Use the sharing details to track the distribution and collaborations involving a specific dataset. Ensure that you have the necessary permissions to access sharing details for datasets.

Troubleshooting: If the sharing details do not appear or if you encounter any issues while accessing the information, please reach out to our support team for assistance.

By following these instructions, you can easily access the sharing details of a dataset on the Registered Datasets screen. Utilize this information to track collaborations and enhance data sharing transparency with other companies.

Data Collaboration

- This module provides the following collaboration functions: To run data overlaps with other companies
- To exchange data with other companies
- To set up connections with other companies.

Enhancing Update Activity Log: Comprehensive Recording of User Actions

We understand the importance of meticulous tracking and auditing of user actions within our platform

We understand the importance of meticulous tracking and auditing of user actions within our platform. Currently, there are certain areas, such as adding users, approving projects, approving selections, and sharing datasets, where the Update Activity log is missing essential entries. This gap in recording crucial actions can hinder accurate monitoring and analysis of user activity.

To address this issue and ensure comprehensive tracking, we are committed to enhancing the Update Activity log. This improvement will encompass all relevant entries for the specified areas, providing you with a more robust tool for monitoring and auditing user actions.

Step-by-Step Instructions

1. Enhanced Recording: With the upcoming enhancement, actions such as adding users, approving projects, approving selections, and sharing datasets will be meticulously recorded in the Update Activity log.
2. Accessible History: You will be able to access a comprehensive history of these actions, allowing for detailed tracking and auditing of user interactions within the platform.

Our commitment to improving the Update Activity log underscores our dedication to providing you with a secure and transparent user experience. With this enhancement, you can be confident that all relevant entries for critical areas will be properly documented, enabling accurate tracking and auditing of user actions. We appreciate your continued trust in our platform, and we're excited to bring you this valuable enhancement.

Enhancing Overlap Matching: Early Warning for Common PII Columns

In our commitment to providing you with an even more efficient experience on our platform, we're introducing an enhancement to the Overlap feature. Currently, successful matching in Overlap requires at least one common Personally Identifiable Information (PII) column between the two client datasets. If this condition is not met, zero matches are returned, which can be frustrating.

To address this, we've implemented a new warning system. Now, when you're booking an overlap, the platform will proactively check for common PII columns between the datasets and provide you

with a warning message if none are found. This way, you'll be aware upfront, saving you time and effort.

Step-by-Step Instructions

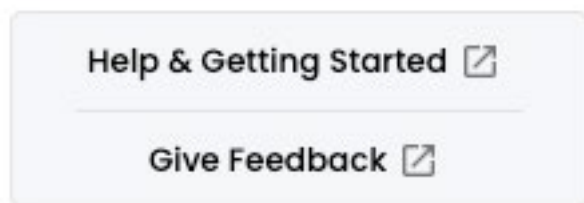
6. **Booking an Overlap:** When you initiate the process to book an overlap between client datasets, our system will perform a quick check.
7. **Warning Message:** If no common PII columns are found between the datasets, a warning message will be displayed on the platform. This message will notify you that the overlap may not yield any results due to the absence of common PII columns.
8. **Review and Adjust:** Upon receiving the warning, you can review your dataset selections and make any necessary adjustments to ensure that at least one common PII column exists between the datasets.

We believe this enhancement will significantly improve your experience when using the Overlap feature. Being aware upfront of any potential issues with PII column matching allows you to make informed decisions and optimize your overlap results. Your time and efforts are valuable to us, and this enhancement is designed to streamline your workflow and provide a more user-friendly experience. Thank you for your continued use of our platform!

Enhancing Your Omnisient User Experience – “Give Feedback” Feature

We've introduced a new “Give Feedback” feature on the sidebar

We're dedicated to continually improving your Omnisient experience, and your feedback is invaluable to us. That's why we've introduced a new “Give Feedback” feature on the sidebar, complete with a link to our Intercom Chat. This feature enables you to share your ideas, suggest enhancements, or report any bugs you encounter. In this article, we'll guide you through how to use this feature effectively.



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Prerequisites

Before you begin, make sure you are logged into your Omnisient account.

Step-by-Step Instructions

1. **Locate “Give Feedback”:** On the sidebar, you'll now see a “Give Feedback” link. Click on it to get started.
2. **Access Omnisient's Chatbot**
3. **Share Your Thoughts:** Use the Omnisient Chatbot to share your feedback with us. Whether it's an innovative idea, a suggestion for improvement, or a bug you've encountered, we want to hear from you.

We value your feedback immensely, and the “Give Feedback” feature makes it easier than ever to share your thoughts with us. We look forward to hearing your ideas, suggestions, and bug reports, as they help us enhance Omnisient and tailor it to your needs. Thank you for being a part of our journey to improvement!

Improved Raw Dataset Insights: Error and Duplicate Count Columns

Enhancing your dataset management capabilities, we’re excited to introduce new columns to your Unregistered Datasets preview. With these additions, you’ll gain valuable insights into the number of errors and duplicates present in your datasets. This empowers you

to identify issues early on and collaborate seamlessly with clients to ensure data accuracy.

Instructions:

1. Navigate to the Unregistered Datasets section from your account dashboard.
2. Click on the actions button and select preview
3. You’ll now notice two new columns: “Errors” and “Duplicates” in the data quality tab.
4. The “Errors” column displays the number of errors detected within the dataset.
5. The “Duplicates” column showcases the count of duplicate entries found in the dataset.

Benefits:

- Early Issue Detection: Quickly spot errors and duplicates as soon as the dataset is uploaded.
- Efficient Client Collaboration: Address issues promptly and revert to clients for resolution, ensuring data accuracy.

By incorporating the “Errors” and “Duplicates” columns, we’re dedicated to improving your dataset management experience. Stay proactive in maintaining data integrity and streamline collaboration with clients by leveraging these insightful additions.

Project Status

1. Awaiting approval
2. Processing
3. Active
4. Failed
5. Locked

Project Roles and Permissions:

OWNER

- Can delete the project
- Has full access to view, edit, and manage the project Can assign project roles to other users
- Has access to project data for creating reports, running analysis, etc. Can view and update project permissions
- Can delete project tables and reports
- Can make selections, download, delete, and reload selections in the project

READ WRITE

- Has access to view and edit the project Can assign project roles to other users

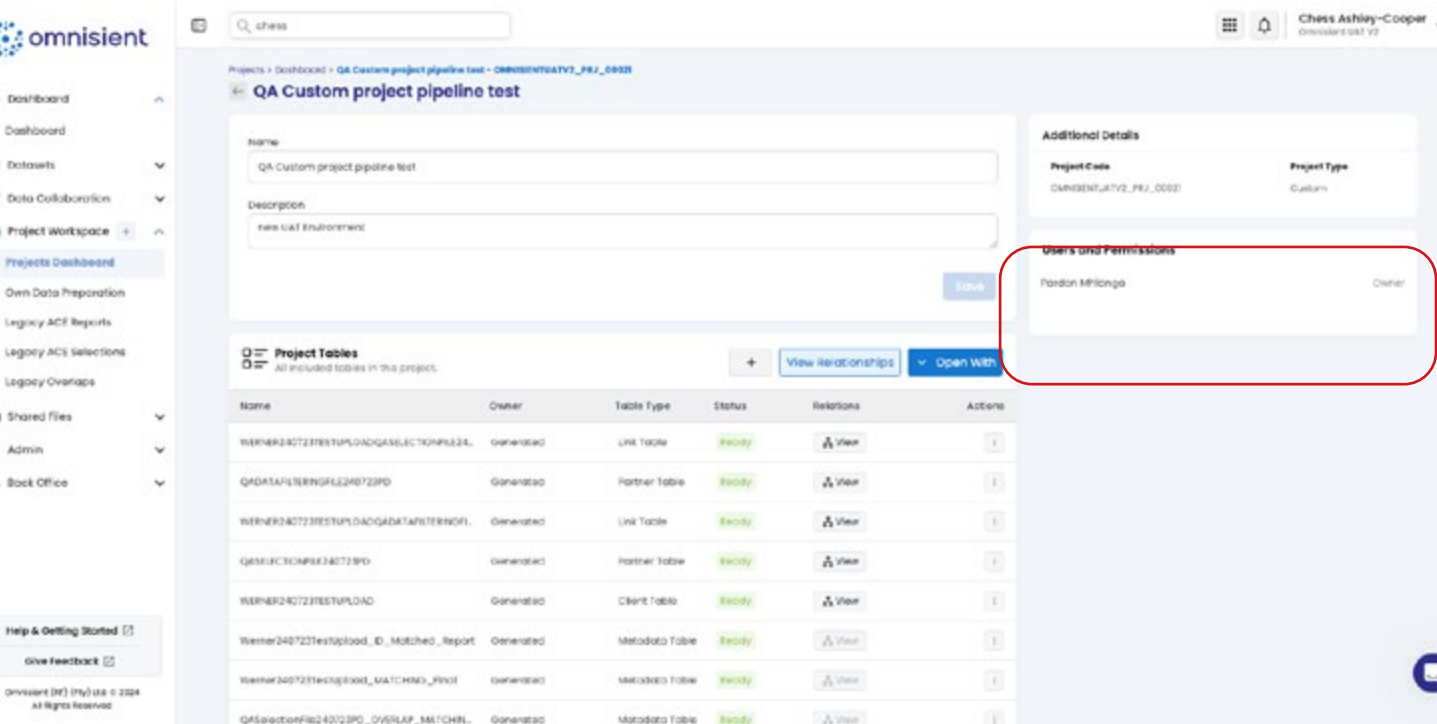
- Has access to project data for creating reports, running analysis, etc. Can delete project tables and reports
- Can view and edit project reports
- Can make selections, download, delete, and reload selections in the project

READ ONLY

- Can view the project
- Has access to project data for creating reports, running analysis, etc. Can view project reports

NO ACCESS

- No access to projects



Loading Indicator on Selections

We have introduced a loading indicator to enhance your data analysis experience. Now, as your records are being analyzed, you'll have real-time visibility into the number of records in your selection.

Stay informed at every step! The loading indicator dynamically updates to display the record count during the analysis process. This ensures you are always aware of the progress and the volume of data being examined.

Enjoy a seamless and informative data analysis journey with this new loading indicator. It empowers you with the knowledge you need to make informed decisions and optimize your data insights. Get ready to dive deeper into your data with confidence!

Shared column on Datasets

We are pleased to announce exciting updates to our dataset sharing features, aimed at streamlining your experience.

In this update, we have made adjustments to the Unregistered Datasets and Available Datasets columns, optimizing how sharing information is displayed. Read on to explore these enhancements!

Datasets

My Datasets

Partner Datasets

Own Data Preparation

Data Mapping Schemas

Reports

Upload Activity Log

Partner Activity Log

Data Collaboration

Project Workspace

Shared Hubs

Admin

Back Office

Unregistered 82

Available 20

Dataset Shares 15

All

+ Add View

Search

Dataset Name	Type	No. shared to	No. of Rows	Update	Status	Actions
30V25m8G4C809_Test_Fit...	Customer	0	128	27 Nov 2024	Ready	Show 1
lookalike01_T0_Test_C...	Derived	1	5K	21 Nov 2024	Ready	Show 1
lookalike01_T0_Test_C...	Derived	1	5K	21 Nov 2024	Ready	Show 1
lookalike01_DD_Test_C...	Derived	1	10K	21 Nov 2024	Ready	Show 1
WemarG4028TestUpload	Customer	0	128	20 Nov 2024	Ready	Show 1
Q48628A8R8H2408A	Customer	0	6	24 Oct 2024	Ready	Show 1
W8H8R240223T8TUPLOAC...	Derived	0	0	17 Oct 2024	Ready	Show 1
W8H8R240223T8TUPLOAC...	Derived	0	0	17 Oct 2024	Ready	Show 1
QAselection16248/QN8	Customer	0	8K	9 Oct 2024	Ready	Show 1

Unregistered Datasets: We have listened to your feedback and simplified the Unregistered Datasets column to provide a more streamlined view. In this update, we have removed the “No Shared To” column, encouraging users to utilize our improved Legacy shared pages for all sharing activities related to Unregistered Datasets.

Available Datasets: For available Datasets, we understand the importance of having clear sharing information. With this in mind, we have decided to display the “No Shared To” column here. This column will provide you with clear visibility into which datasets have not been shared yet, facilitating easy sharing management.

Instructions:

- Access the Unregistered Datasets section to view your Unregistered Datasets.
- For sharing activities, navigate to our enhanced Legacy shared pages, where you can manage all your sharing preferences for Unregistered Datasets conveniently.

Tips and Best Practices:

- Familiarize yourself with the Legacy shared pages for a seamless sharing experience with raw datasets. Keep track of Available Datasets that have not been shared by referring to the “No Shared To” column.

Troubleshooting:

If you encounter any issues or have questions regarding the dataset sharing changes, please don’t hesitate to contact our support team for assistance.

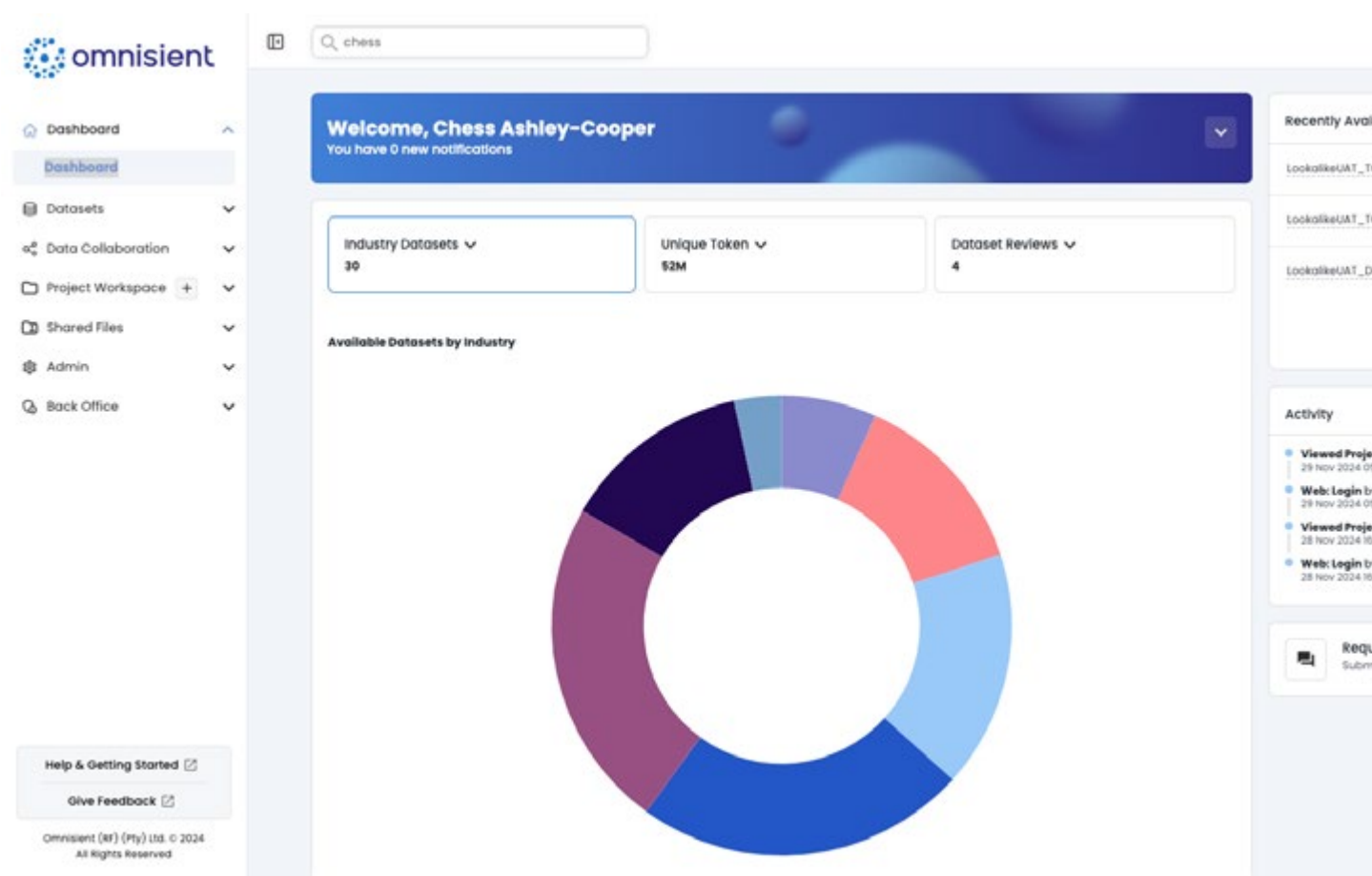
With these dataset sharing enhancements, we aim to improve your sharing experience and simplify the management of sharing activities. By utilizing our Legacy shared pages for Unregistered Datasets and accessing the “No Shared To” column for Available Datasets, you can easily stay on top of your sharing preferences.

Refreshed Look and Enhanced User Experience on the Web App!

We're thrilled to announce that we've given the Web App a delightful makeover, focusing on a lighter and more modern aesthetic.

Here's what you can expect:

- **Revamped Menus:** The top and side menus now feature a clean and crisp white design, providing a fresh and inviting interface.
- **Convenient Short Links:** Access important features quickly through multiple short links accessible via your profile name. These links include "My Profile," "Contact Support," "Service Status," "Cookie Policy," and "Logout."
- **Discover "Help and Getting Started":** At the bottom of the left menu, you'll find a handy link to "Help and Getting Started." This directs you to Omnisent's comprehensive Help Centre, housing a wealth of articles to aid you in getting started. Additionally, it offers a platform for real-time interaction, where you can ask questions and receive prompt responses.



We're committed to providing an enhanced user experience and ensuring you have the support and resources you need. Get ready to explore the new and improved Web App, and embrace a seamless journey with Omnisent!

Handling Tables and Assets

Table Removal

This feature handles the eradication of all tables.

Asset Purge

This function allows for the complete removal of all assets.

Asset Protection

This option is responsible for securing all your assets.

Asset Refresh

This operation enables the renewal or updating of all assets in your system.

As an administrator, you'll be promptly notified via email whenever a shared dataset is locked.

Please refer to the product documentation for more information on these updates and features. As always, we appreciate your feedback and encourage you to reach out to our support team for any assistance.

Status on datasets

New Features:

To provide users with clearer information and manage expectations, we have added a "Status" column in the Datasets tab. This column allows users to easily track the processing status of their uploaded data.

To enhance the user experience, we have added a status column in the Datasets tab of the WebApp.

This column displays various processing statuses, such as

- Not Processed
- Requires Review
- Marked For Delete
- Ready
- Failed

These updates provide users with better visibility into the stages of data preparation and aim to improve the user experience by providing clearer notifications and enhanced visibility into the upload and processing statuses of data.

Datasets Dashboard

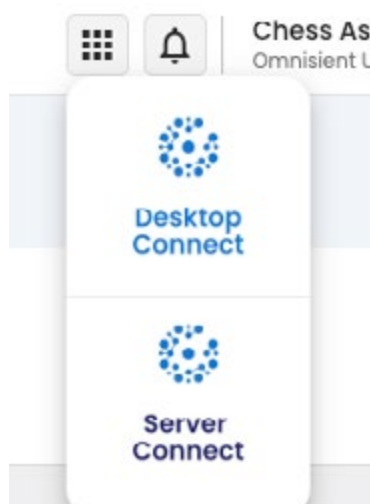
To manage your datasets, follow these simple steps:

- Click on the “Datasets” tab in the left menu. This is where you’ll find the dashboard for all your datasets.
- On this dashboard, you can easily view and manage the following types of datasets: Datasets uploaded by users within your company.
- Datasets shared with your company by a connection partner. Datasets shared by your company with a connection partner.
- Datasets that were flagged and put in quarantine due to potential Personally Identifiable Information (PII) leaks.
- You can explore different categories of datasets on the dashboard:
- Unregistered Datasets: These are datasets containing untreated, unprocessed, and original data.
- Available Datasets: These datasets have been processed and are ready for analysis and data sharing.
- Dataset Shares: These are datasets made available to others for collaboration purposes.
- If a dataset is flagged and put in quarantine due to potential PII leaks, you can easily view it and assess if it can be released.
- If you determine that a quarantined dataset does not actually contain PII, but rather data that may resemble PII (e.g., a document number that looks like a phone number), you can release it from quarantine.

By following these user-friendly steps, you’ll be able to effectively manage and navigate your datasets, ensuring data security and collaboration within your company.

Accessing Desktop apps from the Web App

You can easily navigate between Omnisent Desktop and Web apps – no need to remember or save the links to launch them:



Navigation

The Omnisient Web App is easily navigated using the left horizontal menu. Clicking on each of these menu items will present its own side-bar menu which contains the functionality available under that menu item. In the example below, “Dashboard” is selected in the left navigation, and the first item on the dropdown is also highlighted, indicating we are now showing the Dashboard functionality of the Dashboard main menu item.

Login

Welcome to Omnisient

Login

Email

francescaac+992@gmail.com

Password

.....



[Forgot Password](#)

Login

or sign in with

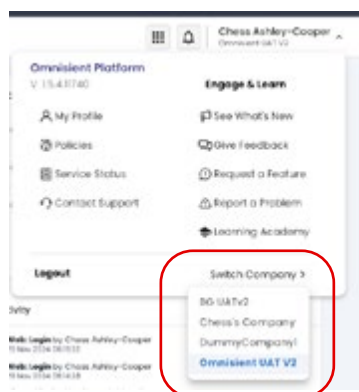


Begin by logging in using your email address and password. When your account has been created, you will receive a welcome email to reset your password:

If you forgot your password, please click on [Forgot Password](#).

Switching Between Companies on the Omnisient Platform: A Step-by-Step Guide

Are you looking to switch between different companies on the Omnisient platform? We’ve made this process seamless to enhance your user experience. Follow this step-by-step guide to easily switch between your companies as you navigate the platform.



Step-by-Step Instructions:

1. Find the company dropdown menu:
2. When you're on your dashboard, look for the dropdown menu in the top-right corner next to your name. It displays your current company's name and lets you switch between the companies you have access to.
3. Open the dropdown menu:
4. Give the downward arrow next to "Switch Company" a click. This opens the menu and shows a list of all the companies you can access.
5. Select the company you want to switch to:
6. View the new company dashboard:
7. After you select a different company, your dashboard will automatically refresh. It will now show the data, projects, and workflows associated with the company you chose.

Conclusion

Switching between companies on the Omnisient platform is simple and efficient, helping you manage and collaborate on projects across multiple companies. If you run into any issues or need extra help, don't hesitate to reach out to our support team through the Intercom help center. We're here for you!

Desktop Connect

Desktop Connect Onboarding Application:

Data Upload – Database

You can upload and anonymize directly from a database by choosing “Database” on step 2:
Select Database which will present you with the screen to configure your database connection:

Omnisient Desktop Connect v2

File Edit View Window Help Web Platform

← Back to Dataset Upload Options

Upload New Dataset

✓ Dataset Details

2 Data Source

3 Select Fields

4 Preview Sample

5 Upload

6 View Upload Summary

Select Data Source

Select the data source. The system will gather and upload the data from this source.

Data Source Type *

File

Database Connection

Database Settings

Data Source

Select data source

Microsoft / Azure SQL Server

Host

Enter host name

Database

Enter database name

Username

Enter username

Password

Enter password

When filled in, you will be presented with your raw, pre-hashed and pre-protected data, similar to the File Source Type option discussed.

Step 2 – Select PII Fields

In this section you will be able to mark three types of fields: Customer Identification, PII fields, and Dedupe fields.

Customer Identification

A customer identifier is a field used within the client’s system to identify a unique customer and to link a customer to other internal datasets. The customer identifier should only exist in the client’s internal system and can therefore not be a PII field. This field will not be anonymized. If the client uses PII fields to identify customers internally then no fields should be selected as a customer identifier – the anonymized PII tokens will then be used.

PII Fields

An Omnisient machine learning model will pre-identify any Personally Identifiable Information (PII) before uploading. However, please double-check that all fields that uniquely identify an individual (such as ID, Phone number, address, name, policy number) have been selected for anonymization.

Dedupe Fields

Should you be reloading an existing dataset, and you know that you have updated values in certain fields, then dedupe must be ticked. Dedupe fields are used to enable ongoing updates to tables where some records need to be replaced with newer versions.

Select Fields and Map PII Fields

Provide more information about which fields to upload and which contain PII.

Customer Identifier

Preview

Omnisient has identified the following data fields and identified possible PII fields. Anything that hasn't been mapped yet can be manually mapped using the dropdown menu. If there is no matching Omnisient category, please select Anonymous PII.

Please review and update or confirm the selected fields below.

⚠ Some data is marked as unsafe. You will need to rectify these issues or re-upload your dataset.

Fields	Upload? <input type="checkbox"/>	Contains PII? <input type="checkbox"/>	Dedupe identifier? <input type="checkbox"/>	PII Category	Status	Actions
id	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
first_name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
last_name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Requires Review	⋮
email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Email Address		
gender	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Requires Review	⋮

When new data is inserted into the table the dedupe fields will be used to determine if older versions of the records exist and flagged to be excluded from further processing and analysis. For example, if a customer updates their email address and their data is again uploaded into the Omnisient platform, the dedupe process will ensure that the new email address is used for any data collaborations. Another example, if a previously uploaded transaction was identified as erroneous and corrected by the client – the new transaction can be uploaded and will be used instead of the old incorrect version.

As can be seen in the screenshot below, our machine learning model predicts and proactively ticks common PII Fields such as ID, Phone, DOB, Vin etc. Again, please always double-check the predictions made to confirm that no PII fields are left un-selected.

The sample below shows that we have marked ID and both the Address Lines as PII. We have also marked some dedupe fields.

On this screen you may also indicate if a field is your own unique internal record identifier, for later match-back after enrichment or selection instead of our iURNs.

In this section, we will map the fields previously selected to one of the following types, by clicking the drop-down menu under “Omnisient Category” and assign it to the appropriate category: ID Number, Phone Number, Email, First Name, Last Name, Vehicle Identity Number, Date of Birth, other

Should any of your marked PII fields not be one of the above, please choose Anonymous PII.

After categorizing your fields, click “Continue” to proceed to Step 4.

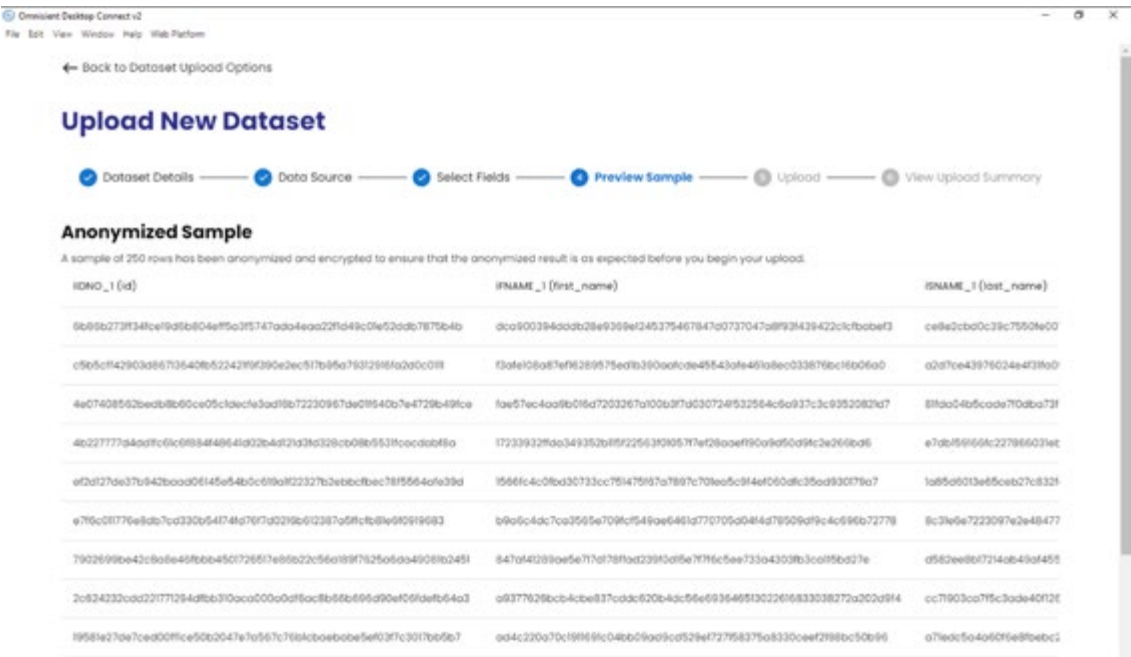
Step 4 – Preview Sample

Data Quality Note – If a large proportion of a column that contains PII data that will be used for matching (e.g., ID / phone number/ email) fails the validation, we recommend that you review the errors and try to fix errors in the source file and re-upload. This is recommended for better match rates later on.

Standardization: We standardize PII fields to a standard format for a better matching result

Tokenization: We encrypt all PII fields with a one-way hash function and other factors. For more information, please see our document Omnisient Secure Compound Matching (SCM) Process.

If all looks correct, click “Start Upload”.



Step 5 – Upload

In this section we will review the data to be uploaded to the Omnisient Platform. Please look through the preview table presented to ensure all columns are aligned and all Personally Identifiable Information (PII) is tokenized. Then click “Start Upload”.

← Back to Dataset Upload Options

Upload New Dataset

Dataset Details — Data Source — Select Fields — Preview Sample — **Upload** — View Upload Summary

Anonymizing and Uploading

Your data is being anonymized and then uploaded, ensuring the safety and security of your data.



Your dataset has been uploaded successfully.

Continue

Once uploaded, you can click the top right button to login to the Omnisient Web App or go there directly (app.omnisient.com) to view and manage your anonymized datasets, and to start exploring value and insights.

Desktop Connect Onboarding Application: Data Upload – File

Data Upload

In this section we will briefly explain how you will use Desktop Connect, the Omnisient Windows-based desktop application to select your data, tokenise and cryptographically protect any personal identifier information (PII), and upload the secure, anonymous data to the Omnisient Platform.

Data Preparation

Please see the “**Data Preparation Format**” for details about what your upload files should look like. First prepare your file or table for upload, then initiate the upload app for securing and uploading it to the Omnisient platform.

Login

After installing the Omnisient Desktop Connect app, begin by launching the application in the windows start menu.

Please note the application will auto-update on launch if necessary. Kindly allow the update to be

completed, then login using the user credentials sent to you in your welcome email.

[← Back to Dataset Upload Options](#)

Upload New Dataset

1 Dataset Details

2 Data Source

3 Select Fields

4 Preview Sample

5 Upload

6 View Upload Summary

Select Data Source

Select the data source. The system will gather and upload the data from this source.

Data Source Type *

☒ File

☐ Database Connection

Select file

chess-mockdata.csv

×

Delimiter

Semi-colon (;)

▼

Preview

id	first_name	last_name	email	gender	ip_address	tel
1	Rich	Charlwood	rcharlwood0@lasl.fm	186.115.248.185	186.115.248.185	186.115.248.185
Corene	Kilmentyonok	ckilmentyonok1@scientificamerican.com	Female	ckilmentyonok1@scientificamerican.com	186.115.248.185	186.115.248.185

Navigating between Omnisient Apps

You can easily navigate between the Omnisient Desktop and Web app – no need to remember or save the links to launch them – just click the link at the top:



The Desktop Connect Upload process for files

After signing into the Desktop Connect app, you will work through five steps to secure and privatize your dataset prior to upload; the final step being the actual upload itself. The picture shows the first page that you will see, with the steps indicated in the progress bar near the top:

1 Dataset Details

2 Data Source

3 Select Fields

4 Preview Sample

5 Upload

6 View Upload Summary

Dataset Details

Please provide the details under which the dataset will be created.

New Dataset Name *

CustomerDecember2023

Dataset contains Personal Identifiable Information (PII)?*

Yes

Not Sure

No

What Type of Data are you Uploading? *

☐ Customer
This is a dataset which contains information about your customer and contains PII that needs to be anonymized.

☐ Transaction
Transactional information that does not contain PII and does not need to be anonymized.

Step 1 – Dataset Details

During this step you will set up your dataset.

Dataset Details:

Dataset Name

Please provide a name for your dataset once it is on the platform, and adhere to the following standards:

- No more than 64 characters
 - No spaces
 - Alpha and Numeric characters only
 - No special characters (for example &*!#)
- There are two source options for your files – a flat file, or an SQL table.

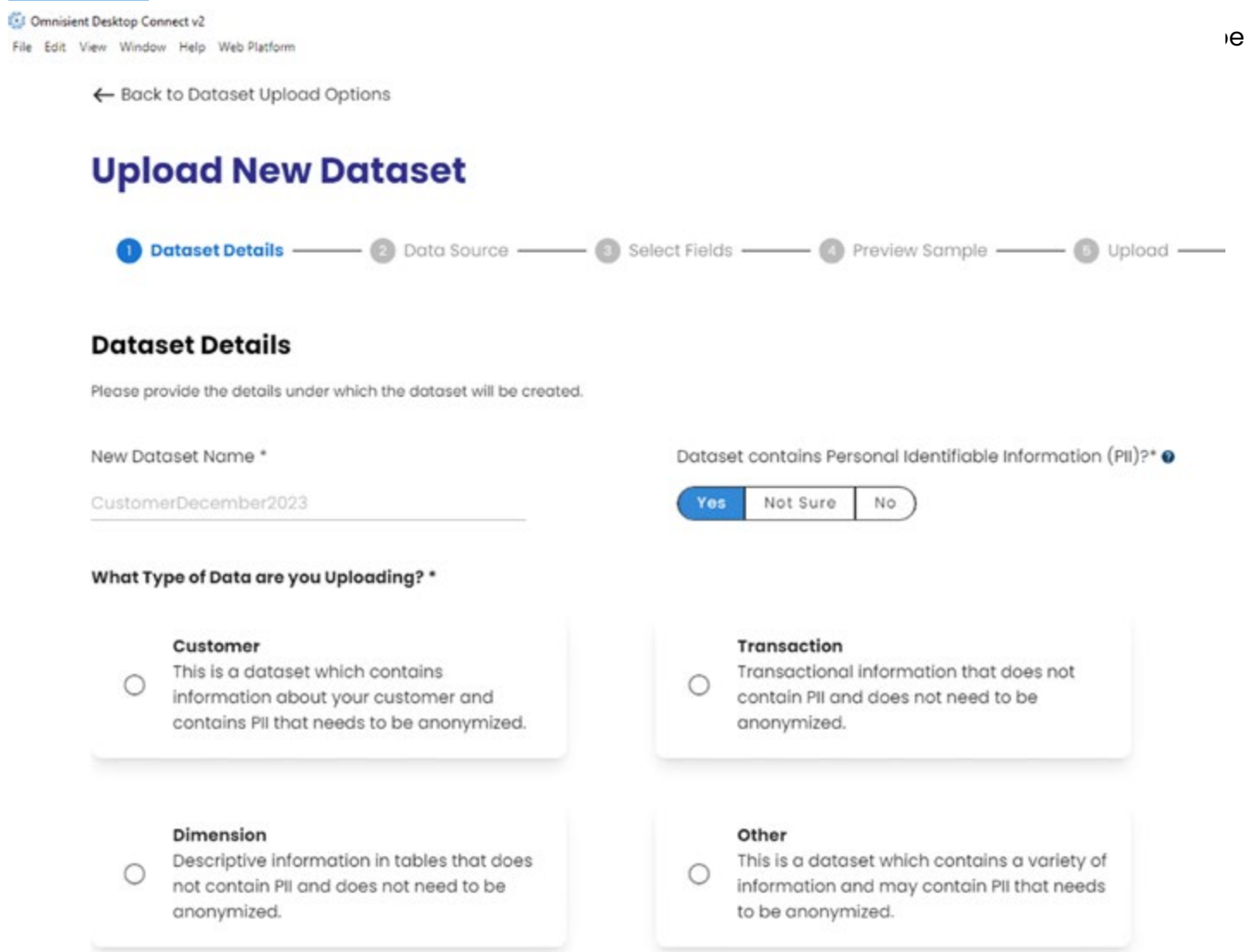
Steps:

1. Type in a name for your uploaded dataset
2. Select the dataset type

Dataset Type

The dataset type can be one of four options:

CUSTOMER



DIMENSION

Descriptive information in tables that does not contain PII and does not need to be anonymized.

OTHER

This is a dataset which contains a variety of information and may contain PII that needs to be anonymized.

Choose your anonymization and re-identification settings

Step 2 – Source file and PII fields:

Your source file should be in CSV format (Pipe delimited) or TXT format (Tab delimited).

← Back to Dataset Upload Options

Upload New Dataset


1 Dataset Details — 2 Data Source — 3 Select Fields — 4 Preview Sample — 5 Upload — 6 View Upload Summary

Select Data Source

Select the data source. The system will gather and upload the data from this source.

Data Source Type *

☒ File ☐ Database Connection

Select file chess-mockdata.csv  Delimiter Semi-colon (;)

Preview

id	first_name	last_name	email	gender	ip_address	tel
1	Rich	Charlwood	rcharlwood0@iost.fm	186.115.248.185	186.115.248.185	186.115.248.185
Corene	Klimentyonok	cklimentyonok1@scientificamerican.com	Female	cklimentyonok1@scientificamerican.com	186.115.248.185	186.115.248.185
3	Cherice	Almond	colmond2@friendfeed.com	Female	34.147.19.255	186.115.248.185
4	Ara	Schoroder	aschoroder3@xinhuanet.com	Male	128.236.242.161	186.115.248.185

When filled in, you will be presented with your raw, pre-hashed and pre-protected data, similar to the File Source Type option discussed.

In this section you will be able to mark three types of fields: Customer Identification, PII fields, and Dedupe fields.

Step 3 – Choose PII fields:

Customer Identification

A customer identifier is a field used within the client's system to identify a unique customer and to link a customer to other internal datasets. The customer identifier should only exist in the client's internal system and can therefore not be a PII field. This field will not be anonymized. If the client uses PII fields to identify customers internally then no fields should be selected as a customer identifier the anonymized PII tokens will then be used.

Jupyter Notebook is an open-source web application that's become one of the go-to tools for data scientists, analysts, and even educators in recent years. It provides an environment where you can write live code, equations, visualizations, and narrative text—all in a single document, making it a versatile choice for a variety of data projects.

What sets Jupyter Notebook apart is its ability to combine code execution with data visualization and rich text, facilitating a more interactive and insightful data exploration process. You can literally jot down your thought process while simultaneously running code snippets, making it an excellent tool for both the development and sharing of data analyses.

Getting Started:

1. Log in to your web app using your credentials.
2. Ensure you have an active subscription for Jupyter Notebook access.
3. Discover the Jupyter Notebook feature on your project page.
4. Click the "Jupyter Notebook" button to launch and start coding.

Here is the template code that you can run in JupyterHub to pull data from the SQL project schema on the DW into the JupyterHub environment in the same project, and will pull it into the df dataframe.

```
%load_ext omni_hub
%omni_hub
data = %omni_hub {'select top 100 * from [specific client project code / schema
].[Test]'} df = data.DataFrame()}
```

e.g. client and project code: ClientName_Prj_00001

Alternatively, it would be ClientName_a if it is from your "Own Data Preparation" section of the platform.

"Test" would be replaced by the specific data table name that you are wanting to query.

"top 100" limits the data extracted to just the top 100 rows of data, and can be left out if you want the whole table extracted into JupyterHub.

Note that for very big datasets, the python compute in JupyterHub may run out of memory , so it's advisable to do as much of your big data preparation, cleaning, joining, sampling down, etc... in SQL as possible

Best Practices:

Familiarize yourself with Jupyter Notebook's features and capabilities to maximize your productivity within the integrated Python environment.

Encountering Issues?

If you encounter any challenges or have questions related to Jupyter Notebook, please consult our help center documentation or reach out to our dedicated support team for prompt assistance.

This integration opens up a world of possibilities for collaborative Python programming and data analysis. Make the most of this powerful tool within our user portal. For more details on these updates and features, refer to our product documentation. We value your feedback and are here to support you every step of the way.

Power BI Reports

Unveiling the Power of Data Visualization Reports

Power BI is a dynamic ecosystem comprising software services, applications, and connectors, harmoniously engineered to transform disparate data sources into cohesive, visually captivating, and interactive insights. Power BI seamlessly connects to your data sources, enabling you to visualize, explore, and communicate key insights with ease.

Connecting and Visualizing Data

Build visually engaging reports that bring your data to life and help you uncover valuable insights.

Paginated Reports for Operational Insights

Explore another essential workflow in Power BI, focused on paginated reports.

Paginated reports are meticulously designed to fit neatly on a page and are often utilized for operational reporting purposes. These reports present all data in a tabular format, ensuring comprehensive visibility, even across multiple pages.

Consuming Reports in the Power BI Service

In the Power BI service, you can seamlessly consume and interact with reports, as well as individual visual elements, directly from the Omnisient app.

Gain actionable insights and make informed decisions based on the reports generated within the Power BI environment.

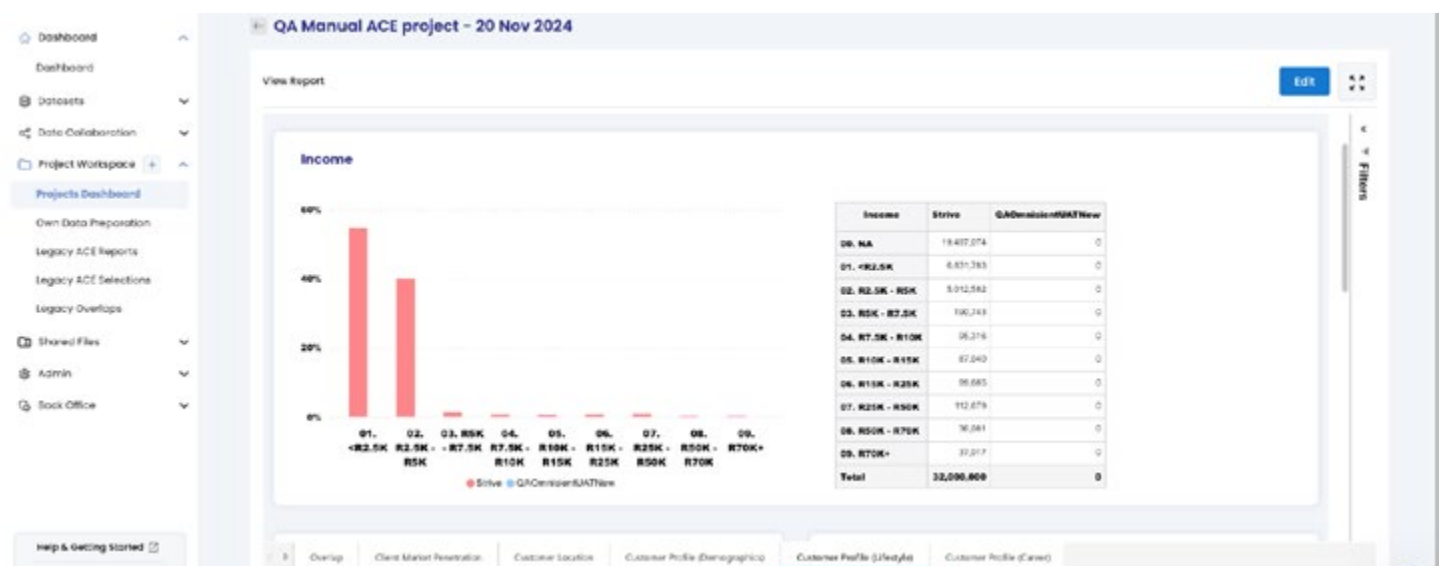
With Power BI, the power of data visualization is at your fingertips. Empower yourself to unlock the full potential of your data, from connecting to diverse data sources to creating compelling reports and paginated insights. Whether you're a data analyst, business user, or decision-maker, Power BI equips you with the tools to drive meaningful outcomes and propel your organization forward. Explore the possibilities with Power BI and revolutionize the way you harness data-driven insights.

Step by step Instructions:

Access the ACE report page and navigate to Tab 4.

On Tab 4, you will find detailed analyses of lifestyle factors, specifically property value and vehicle ownership.

Explore the comparison between these lifestyle indicators and the broader Strive Universe.



PII Fields

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Dedupe Fields

Should you be reloading an existing dataset, and you know that you have updated values in certain fields, then dedupe must be ticked. Dedupe fields are used to enable ongoing updates to tables where some records need to be replaced with newer versions.

When new data is inserted into the table the dedupe fields will be used to determine if older versions of the records exist and flagged to be excluded from further processing and analysis. For example, if a customer updates their email address and their data is again uploaded into the Omnisient platform, the dedupe process will ensure that the new email address is used for any data collaborations. Another example, if a previously uploaded transaction was identified as erroneous and corrected by the client – the new transaction can be uploaded and will be used instead of the old incorrect version.

As can be seen in the screenshot below, our machine learning model predicts and proactively ticks common PII Fields such as ID, Phone, DOB, Vin etc. Again, please always double-check the predictions made to confirm that no PII fields are left un-selected.

The sample below shows that we have marked ID and both the Address Lines as PII. We have also marked some dedupe fields.

On this screen you may also indicate if a field is your own unique internal record identifier, for later match-back after enrichment or selection instead of our iURNs.

In this section, we will map the fields previously selected to one of the following types, by clicking the drop-down menu under “Omnisient Category” and assign it to the appropriate category: ID Number, Phone Number, Email, First Name, Last Name, Vehicle Identity Number, Date of Birth, other

Should any of your marked PII fields not be one of the above, please choose Anonymous PII.

After categorizing your fields, click “Continue” to proceed to Step 4.

Step 4 – Preview Sample

Data Quality Note – If a large proportion of a column that contains PII data that will be used for matching (e.g., ID / phone number/ email) fails the validation, we recommend that you review the errors and try to fix errors in the source file and re-upload. This is recommended for better match rates later on.

Standardization: We standardize PII fields to a standard format for a better matching result

Tokenization: We encrypt all PII fields with a one-way hash function and other factors. For more information, please see our document Omnisient Secure Compound Matching (SCM) Process.

If all looks correct, click “Start Upload”.

Once uploaded, you can click the top right button to login to the Omnisient Web App or go there directly (app.omnisient.com) to view and manage your anonymized datasets, and to start exploring value and insights.

Desktop Installation Troubleshooting FAQ

These are some of the possible issues faced during the installation of the Desktop Connect onboarding application.

- Failure to download or run the install file: Omnisient

This may be caused by your antivirus or firewall blocking the download. Click “keep” or “save anyway” or “run anyway” as needed.

Use the launch button to download the Omnisient Desktop Connect application.

Firewall blocking app install or use:

Please contact your IT administrator and have the following URLs whitelisted. api.omnisient.com

- app.omnisient.com
- auth.omnisient.com
- omnisientapi.azurewebsites.net
- omnisientsecurity.azurewebsites.net intersect.blob.core.windows.net
- columnprediction.blob.core.windows.net static.omnisient.com

Contact Omnisient support for an MSI installer & further support.

Desktop Connect Onboarding Application: Installation

Installation of Omnisient Desktop Connect

Please download the Onboarding Application: Omnisient Desktop Connect onboarding desktop installer at the following URL : <http://omnisient.com/installer?region=za>.

Please follow the installation wizard through to the end.

1. Once the file is downloaded, click on it. (You will find it on your screen, or in your Download Folder):
2. Select Install:
3. Once the install the installation is completed the app will auto-launch and you will be presented with the login screen:
4. Use the credentials sent to you via our welcome email. Search for “Omnisient Welcome” in your email inbox. The Desktop Connect screen will follow, and you can proceed through the prompts.

Data Upload Quarantine

If your dataset has a high rate of errors (<50%) we will send you an email notifying you.

We kindly request that you take the following actions:

1. **Review Your Dataset:** Carefully review the dataset to identify and address the errors and data quality issues.
2. **Data Cleansing:** Perform necessary data cleansing, validation, and correction to ensure the dataset meets the required quality standards.
3. **Re-upload Your Dataset:** Once the necessary improvements have been made, please re-upload your dataset through the designated platform.

Contact Support

If you require any assistance or have questions regarding the quarantine or dataset re-upload

process, please do not hesitate to contact our support team at support@omnisient.com. We are here to assist you in resolving these issues and ensuring the successful integration of your data.

We understand the importance of data quality and its impact on your projects.

Managing Source Files without Headers in the Omnisient Platform

When a customer uploads a source file that lacks headers, a default behavior is applied

In the Omnisient platform, when a customer uploads a source file that lacks headers, a default behavior is applied. The system automatically designates the first line of the file as the headers for the dataset. However, there is a potential issue with this approach: all the headers end up containing the Personally Identifiable Information (PII) of the first person in the dataset. This article will guide you on how to manage this situation effectively.

Prerequisites

Before proceeding, ensure you have access to the Omnisient platform and a basic understanding of data uploading and file management.

Step-by-Step Instructions

1. **Review the Uploaded File:** After uploading a source file without headers, carefully review the first line of data. This is essential to identify if any PII is present within the first person's information.
2. **Manual Header Assignment:** If the first line indeed contains PII and shouldn't be used as headers, you have the option to manually assign headers. To do this:
3. **Assign PII categories** for the appropriate headers for each column based on the data's content.
4. **Data Cleaning:** Once you've assigned headers, consider cleaning the first row of data, removing any PII that shouldn't be included in the dataset headers.
5. **Data Validation:** After completing these steps, it's crucial to validate the dataset to ensure it now correctly represents your data without exposing sensitive information.

Tips and Best Practices

1. Try to include headers in their source files whenever possible to avoid this issue.
2. Review data carefully, especially when dealing with files without headers.

Conclusion

By following these steps, you can effectively manage source files without headers in the Omnisient platform. This ensures that your dataset headers accurately represent the data without inadvertently exposing PII from the first person in the file.

Successful Upload: Your Dataset is in Good Hands

You will now receive an email when your dataset has been successfully uploaded from the Desktop App.

Your dataset has been uploaded successfully.

It will now run through our processes, and we will notify you when you can action the dataset on the Omnisient cloud platform. Your password is the same as for the Server Connect / Desktop App.

Stay tuned for our next update, where we'll notify you as soon as your dataset is ready for action. We're committed to providing you with a seamless experience as you navigate our platform.

If you have any questions or need assistance, please feel free to reach out to our dedicated support team. Thank you for choosing Omnisient. We're excited to be part of your data-driven journey!

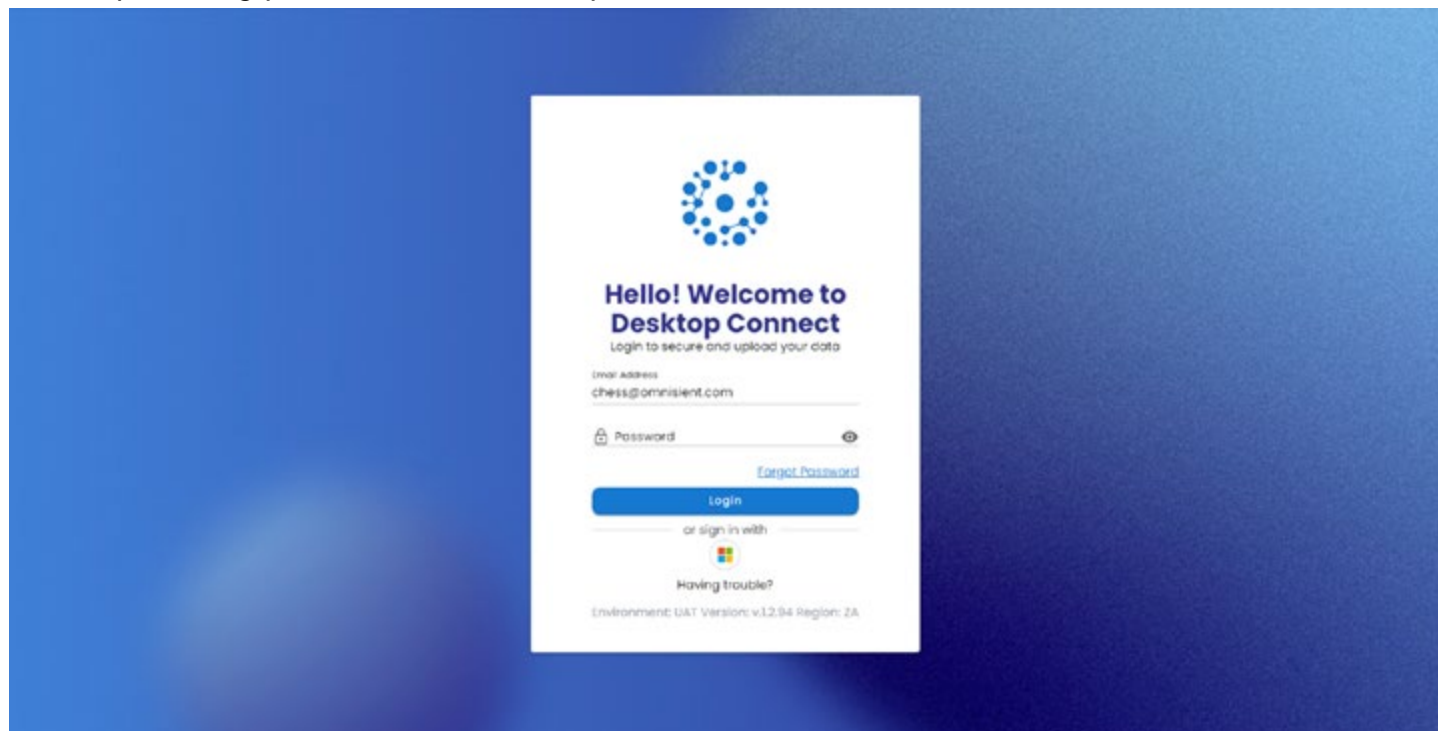
Server Connect

Articles and help, based on Omnisient's Server Connect

Server Connect Configuration: Choose Login Option or API Key & Secret

As an Omnisient Server Connect Configuration user, we are excited to introduce a new feature that enhances your login options and simplifies the process of generating API Key & Secret.

With this update, you can now choose between two login options: username password or API Key & Secret, providing you with more flexibility and ease of access.



generation, please reach out to our support team for prompt assistance.

With this update, setting up the Server Connect Configuration app becomes more user-friendly, empowering you to choose the login option that best suits your needs. Additionally, generating your API Key & Secret is now a seamless process, enabling secure access to your Omnisient Server Connect Configuration account.

The Sequential Column Name

The Sequential Column Name is a field required to be present in all Server Connect upload source files (but not Desktop Connect). It should contain a unique sequential number for that field and is used by Server Connect to keep track of the latest record processed between multiple uploads. It does not have to be in any sorted order.

Refreshed Look and Enhanced User Experience on the Web App!

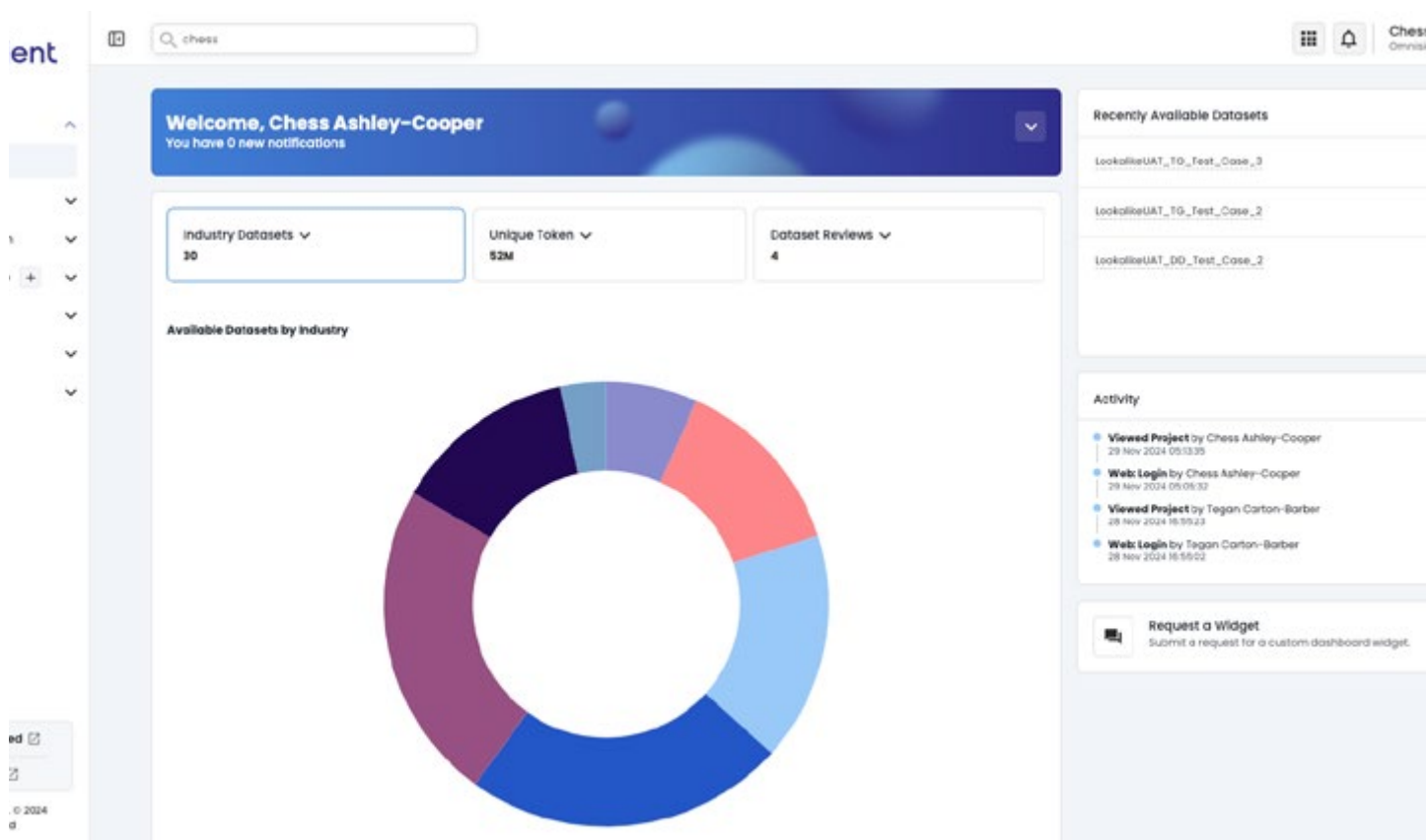
We're thrilled to announce that we've given the Web App a delightful makeover, focusing on a lighter and more modern aesthetic.

Here's what you can expect:

Revamped Menus: The top and side menus now feature a clean and crisp white design, providing a fresh and inviting interface.

- **Convenient Short Links:** Access important features quickly through multiple short links accessible via your profile name. These links include "My Profile," "Contact Support," "Service Status," "Cookie Policy," and "Logout."
- **Discover "Help and Getting Started":** At the bottom of the left menu, you'll find a handy link to "Help and Getting Started." This directs you to Omnisient's comprehensive Help Centre, housing a wealth of articles to aid you in getting started. Additionally, it offers a platform for real-time interaction, where you can ask questions and receive prompt responses.

We're committed to providing an enhanced user experience and ensuring you have the support and resources you need. Get ready to explore the new and improved Web App, and embrace a seamless journey with Omnisient!



Project Template: Overlaps

Unveiling the Overlap Project Template in the 'Projects' Section

Introducing a fresh addition to your project-creation journey: the Overlap Project template.

Now, whenever you tap on 'Create New Project', you'll see a window showcasing available project templates.

Prerequisites:

You will need to have created a dataset and have shared it with a partner.

Dive into an Overlap Project.

Upon selecting the Overlap Project, you'll be welcomed by a brand new 'Overlap Project' window.

In the Overlap Project window, you'll find a section displaying your currently available datasets in a tabular view. Feel free to choose the datasets you'd like to overlap

Moreover, the window also contains a section showcasing available data collaborations from other sources, broadening your project's potential.

Please refer to the product documentation for more information on these updates and features. As always, we appreciate your feedback and encourage you to reach out to our support team for any assistance.

Mastering the Own Data Preparation Project Feature in Omnisient Platform

The Own Data Preparation project feature in the Omnisient Platform empowers users to manage their data more effectively.

The Own Data Preparation project feature in the Omnisient Platform empowers users to manage their data more effectively. This article guides you through the process of accessing and utilizing this feature to prepare your data using SQL Pad and the upcoming Jupyter Notebook integration. This guide is intended for users looking to optimize their data management and analysis experience on the Omnisient platform.

Prerequisites

Before starting, ensure you have an active Omnisient account and access to the platform. Familiarity with data management concepts and tools like SQL Pad and Jupyter Notebook is helpful but not required.

Step-by-step instructions

1. Log in to your Omnisient account and navigate to the main dashboard.
2. Locate the left side navigation menu and click on "Own Data Preparation" or visit this link: <https://app.omnisient.com/projects/own-data-preparation>
3. In the Own Data Preparation section, you will find two primary data preparation tools: SQL Pad and Jupyter Notebook .
4. To use SQL Pad for data preparation, follow these steps:
 - ◇ Click on "SQL Pad" to open the query editor.
 - ◇ Write SQL queries to manipulate and transform your raw encrypted data into structured

tables.

- ◇ Execute the queries by clicking on the “Run” button and review the results.
- ◇ Save your Available Datasets as tables for further analysis or reporting.

5. The Jupyter Notebook integration provides an additional option for data preparation in a more interactive and versatile environment.

Tips and best practices

- Regularly review and update your data preparation processes to ensure data quality and consistency.
- Invest time in learning SQL and Jupyter Notebook to maximize the efficiency and accuracy of your data preparation tasks.
- Maintain clear documentation of your data preparation steps and queries for future reference and collaboration.

Troubleshooting

- If you encounter issues executing queries in SQL Pad, ensure your query is formatted correctly and adheres to SQL syntax rules. Consult SQL documentation if needed.
- For any other issues or concerns, contact Omnisient support for assistance.

Omnisient Help

Looking to chat to us or find an answer to your questions? Look no further!

The image shows a screenshot of the Omnisient dashboard. The dashboard includes a search bar at the top, a welcome message for 'Chess Ashley-Cooper', and several data visualization widgets. A red box highlights a chat overlay on the right side of the screen. The chat overlay has a blue header with the Omnisient logo and the text 'Hi Chess 🙌 How can we help?'. Below the header, there is a 'Recent message' section showing a message from 'Omnisient Bot' dated 16h ago. There is also an 'Ask a question' section with a question mark icon. At the bottom of the chat overlay, there is a navigation bar with icons for Home, Messages, Tickets, Help, and News.

Need Help?

Your first point of contact is our handy help bot, seen in the bottom right of your screen. If you click on it you get a few options:

If you'd like to send a message and engage with our bot or someone in person, please click on messages. If you'd like to source our knowledge library simply click on help, and type in your query.

Want to know what's new at Omnisient? Click on News!

If you'd prefer to send us a message – you can do so [here](#)

Product Feature Request

Explore our new Feature Request section and share your ideas to help us tailor Omnisient platform to better serve your data analysis, trading, and machine learning needs.

Did you know you can request a feature on the Omnisient App?

At Omnisient, we are committed to continuous innovation and improvement. Our goal is to provide a data solution tailored to your unique needs.

To make this happen, we need your input, and that's why we're excited to unveil our new Feature Request section.

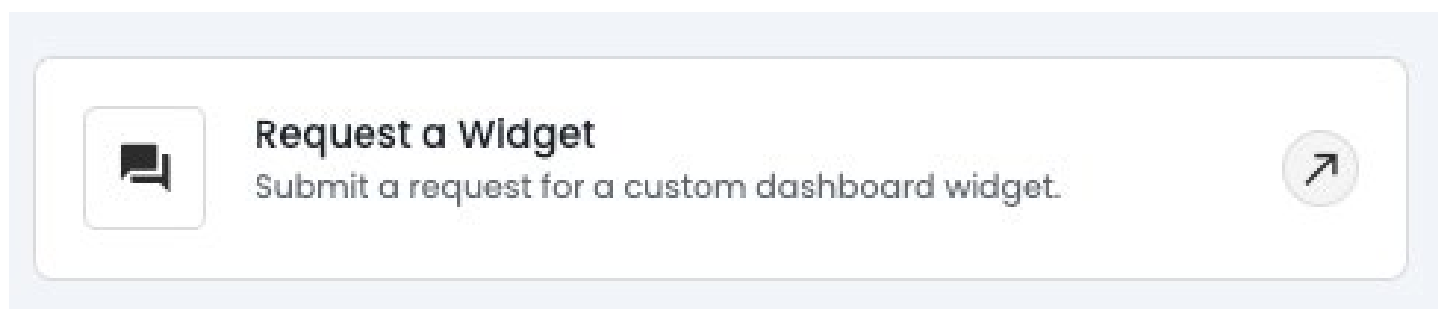
Submitting a feature request is straightforward:

Just **[click here](#)**

Be a Part of Omnisient's Evolution: Submit Your Feature Requests Now!

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Submitting a feature request is straightforward:



1. **Follow the link:** Click **here** to visit our Feature Request page.
2. **Title your feature request:** Choose a succinct yet descriptive title to encapsulate your idea.
3. **Write a short description:** Expand on your idea. What problem does it solve? How does it enhance your experience with our platform?
4. **Attach an image or document (optional):** If a visual or additional document would help express your idea, please include it!

Our Feature Request section is more than a suggestion box—it's a community.

Here, you can see what other users are thinking, upvote requests that align with your needs or are gaining traction in the community. Your votes help us identify high-priority features for development.

We believe in transparency and ongoing dialogue. You'll see our feedback on your requests, and we'll update you as we progress on popular features.

Your insights are crucial to our mission! Together, we can shape the future of Omnisient. We eagerly anticipate your inventive feature requests!

Bugs

Let's Make Omnisient Bug-Free: Report Issues in Our New Bugs Section!

Help Us Squash Bugs: Report Your Findings in Our New Bugs Section!

At Omnisient, we're dedicated to ensuring a seamless user experience, and we understand the importance of identifying and resolving bugs promptly. That's why we're thrilled to present our new Bugs section, a platform where you can report any glitches you encounter while using our services.

Here's how to report a bug:

At Omnisient, we're dedicated to ensuring a seamless user experience, and we understand the importance of identifying and resolving bugs promptly. That's why we're thrilled to present our new Bugs section, where you can report any glitches you encounter while using our services.

Integrated Jupyter Notebook Solution

We're thrilled to announce the integration of Jupyter Notebook directly into our web app for subscribers. This tailored implementation offers a collaborative and concurrent Python runtime environment, powered by Jupyter Notebook. Whether you're a beginner or an experienced user, this solution provides a seamless and efficient Python programming and data analysis experience.

Getting Started:

1. Log in to your web app using your credentials.
2. Ensure you have an active subscription for Jupyter Notebook access.
3. Discover the Jupyter Notebook feature on your project page.
4. Click the "Jupyter Notebook" button to launch and start coding.

Best Practices:

Familiarize yourself with Jupyter Notebook's features and capabilities to maximize your productivity within the integrated Python environment.

Encountering Issues?

If you encounter any challenges or have questions related to Jupyter Notebook, please consult our help center documentation or reach out to our dedicated support team for prompt assistance.

This integration opens up a world of possibilities for collaborative Python programming and data analysis. Make the most of this powerful tool within our user portal. For more details on these updates and features, refer to our product documentation. We value your feedback and are here to support you every step of the way

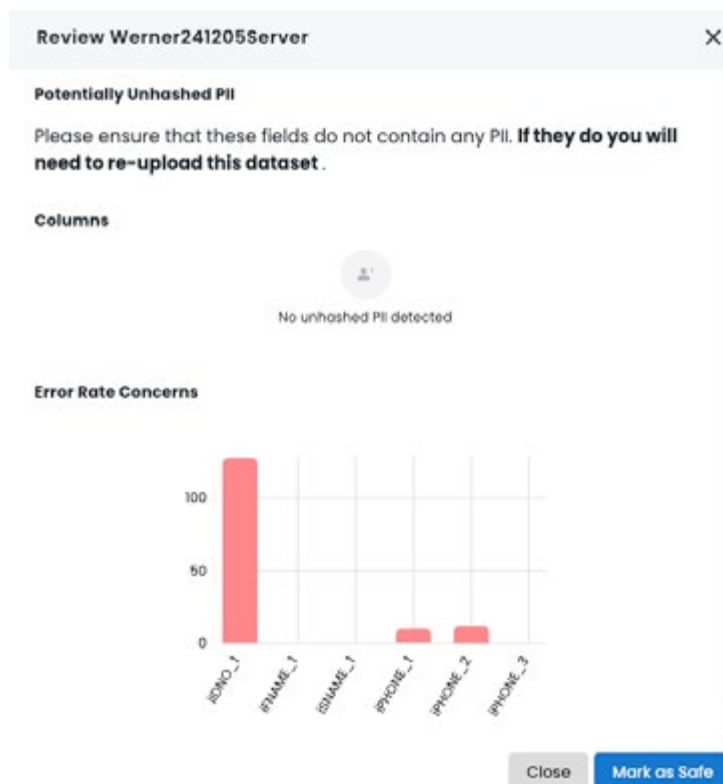
Raw and Available Datasets

1. Upload your dataset via Desktop/Server Connect
2. Dataset gets captured/listed under Unregistered Datasets and shows the upload process status
3. Then once the upload process is complete or the dataset reaches the available status, it will show under the Available Datasets: unregistered table
4. This step is to prevent the user from trying to register/share a dataset that is still in progress/busy with the upload process

From there the user can register the dataset on the Unregistered page, which will result in displaying the dataset under registered datasets

Notify high number of invalid PII data

You will now receive an email if you're dataset has a high rate of errors and has been quarantined.



Creating a Comprehensive Marketing Attribution Report with Rainmaker and Consumer Data

In this guide, we will walk you through the process of creating a detailed marketing attribution report utilizing data from both Rainmaker and Consumer data. By following these steps, you will be able to generate a comprehensive report, highlighting key metrics of your marketing campaigns. Please ensure you meet the specified requirements and business rules to successfully execute this process.

Acceptance Criteria:

You are enabled to upload a table with the specified format.

Provided access to the necessary Rainmaker audience data to link with their data.

We ensure client access to preloaded consumer data, including total audience size and post-segmentation statistics. Utilize the Project Template "Rainmaker Attribution Report" for report generation.

Automatically generate a PowerBI report for a comprehensive visualization of the data. Grant access to underlying tables in SQL PAD and Jupyter for further analysis and insights. Business Rules:

This Project Template is exclusively accessible to companies with an active subscription to Rainmaker. Clients can only view audiences that are accessible to them through Dependency Data Sharing

Prerequisites:

Valid credentials for accessing the Rainmaker platform. Active subscription.

Business Rules:

This Project Template is exclusively accessible to companies with an active subscription to Rainmaker. Clients can only view audiences that are accessible to them through Dependency Data Sharing.

Step-by-Step Instructions:

Step 1: Uploading Data Table

Ensure your data table adheres to the specified format requirements.

Log in to your Omnisient account and navigate to the "Projects" section.

Select the "Rainmaker Attribution Report" template to initiate the project setup.

Step 2: Connecting Rainmaker Audience Data

Use the provided integration tool to link your data with the relevant Rainmaker audience data.

Confirm that the data linkage is accurate and complete to ensure comprehensive attribution analysis.

Step 3: Accessing Consumer Data

Explore the consumer data preloaded into the platform, including total audience size and post-segmentation details.

Verify that the data aligns with your campaign metrics and objectives.

Step 4: Utilizing the Rainmaker Attribution Report Template

Configure the Rainmaker Attribution Report template to include the desired key metrics and analysis parameters.

Ensure that the report template accurately reflects the specific requirements of your marketing campaign.

Step 5: Automatic PowerBI Report Generation

After configuring the Rainmaker Attribution Report, the automatic generation of a PowerBI report for comprehensive visualization and analysis will begin.

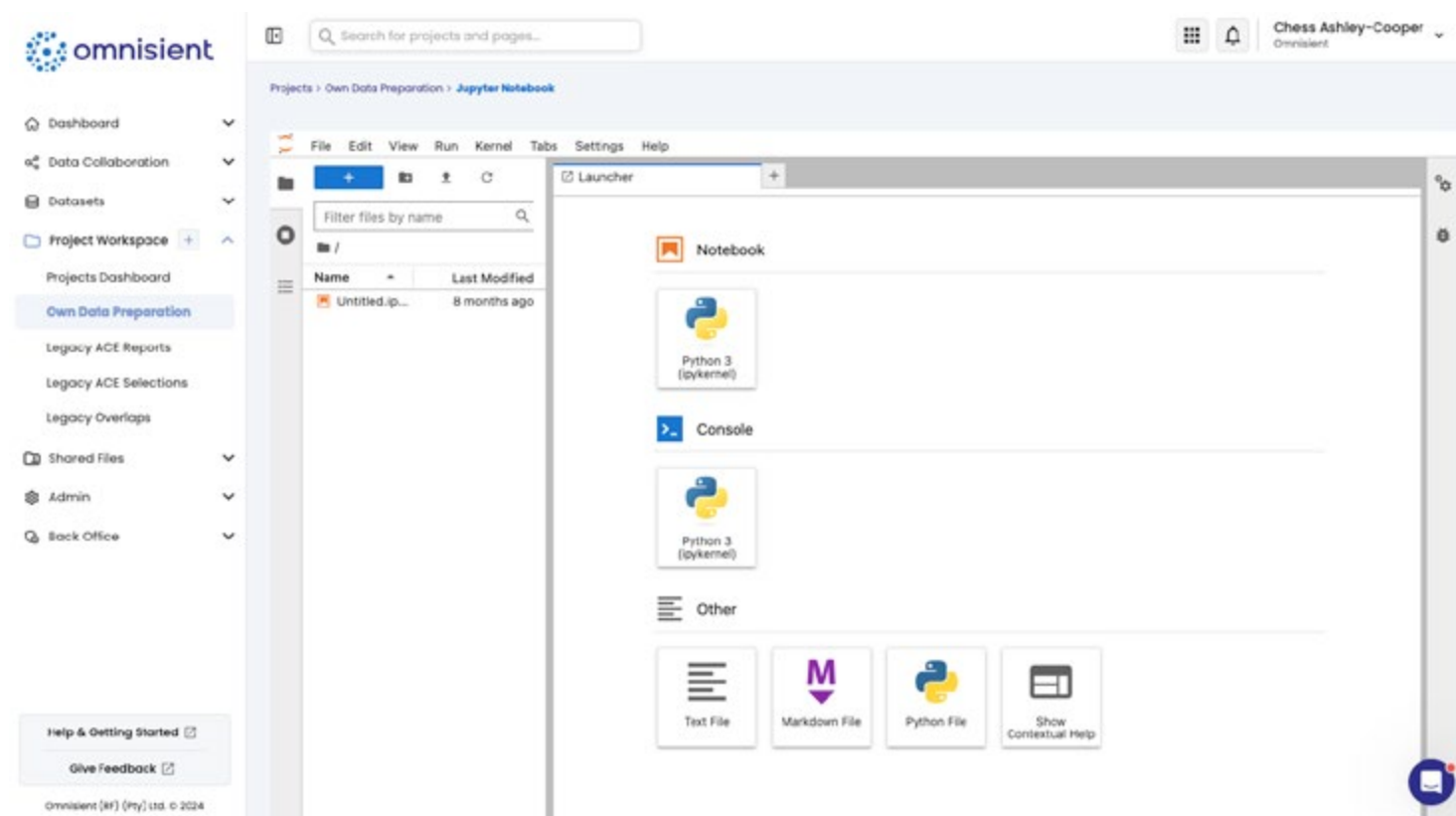
Step 6: Accessing Underlying Tables in SQL PAD and Jupyter

Gain access to the underlying tables in SQL PAD and Jupyter for in-depth analysis and customized reporting as needed.

By following these steps, you can efficiently create a comprehensive marketing attribution report that integrates data from Rainmaker and consumer data, enabling you to make data-driven decisions and optimize your marketing strategies effectively. If you encounter any issues or need further assistance, please reach out to our support team for prompt resolution.

Introducing Our Integrated Jupyter Notebook Solution

Python, a widely used programming language for Data Scientists, offers built-in mathematical libraries and functions, simplifying complex calculations and data analysis tasks. With Python integrated into Omnisient, data scientists can seamlessly work on anonymized data without the hassle of moving it around. Additionally, it facilitates the automation of tasks and processes, streamlining workflow for enhanced productivity and efficiency.



What is Server Connect?

Omnisient's Server Connect is the automated version of our data anonymization process which runs behind the Client's firewall. It is a console application written in .NET Core6.0, which means it is cross-platform compatible.

Our Server Connect application currently supports three data sources – File-based CSV, Parquet, Microsoft SQL Server/Azure SQL, MySQL/MariaDB and PostgreSQL.

For the file-based data source, a file path directory needs to be specified where the source files must be dropped into. Every time the Server Connect application is executed, it will scan the directory for any new files, and it will process the files against the provided configuration.

If the data source is a database, Server Connect will scan a database table, or, using a SQL query, it will check for any new records based on a sequential number or date field within the database.

Multiple configurations can be set up, which allows for the loading of multiple datasets with different schemas. They can even run in parallel, but only one instance per configuration is allowed at a time.

In the Server Connect configuration module a dataset name, data source details and the data schema are set up. It also provides for a choice of whether to save the iURNs locally for custom data selections later on or to not save iURNs.

The Server Connect upload process can be run as a once-off command, or a tool can be used to run the application at a scheduled interval period.

Server Connect Process Overview

The picture below is an overview of the steps required to install as well as enable the Server Connect Environment, from installing and uploading one client's data.

Server Connect Installation

Installation Steps Summary

The steps below are required to enable the Server Connect application, and will be described in more detail below:

1. Provision server that you wish to run the application on
2. Install the .NET Core 6.0 SDK <https://dotnet.microsoft.com/en-us/download/dotnet/6.0>
3. Download application file from <https://api.omnisient.com/downloads/enterprisev2>
4. Unzip downloaded file to a directory on the server
5. Setup the API Keys in the web application <https://app.omnisient.com>
6. Run Configurator application
7. The Configurator is a self-hosted web server, which helps you setup configurations for your server
8. You can either run it directory on a server, but the case of Linux without any user interface you will need to open port 5000, to access the Configurator screen
9. Or you can run it on your own machine and copy the configurations to the server
10. Setup configuration
11. Make sure data is available as per configuration
12. Run application with new configuration name
13. Schedule application to automatically run at specified intervals (optional)

Prerequisites

The server application is compatible with Windows, Linux and Mac OS.

- Windows Server Specification and Requirements
- Supports most modern Windows + Windows Servers versions
- RAM: 8GB+ (depending on number of parallel uploads)
- Disk Space:
 - 100MB for software.
 - SSD Hard drive is recommended
- Make sure you have the .NET Core 6.0 SDK installed.
 - ◊ You can download it from here: <https://dotnet.microsoft.com/en-us/download/dotnet/6.0>

Domains and IP Ranges to be whitelisted

Domains

omnisientapi.azurewebsites.net

omnisientsecurity.azurewebsites.net

intersect.blob.core.windows.net

static.omnisient.com

IP Ranges:

Azure AppServices:

102.133.122.160/27,

102.133.154.32/27,

102.133.218.32/28,

102.133.250.160/27,

2603:1000:104:402::a0/123

2603:1000:104:802::a0/123

2603:1000:104:c02::a0/123

Azure Storage: 20.38.114.128/25

20.47.50.0/24

20.60.190.0/23

20.150.21.0/24

20.150.62.0/24

20.150.101.0/24

52.239.232.0/25

API Key Generation

API Key Generation is a module within the Omnisient Web App. The section below describes how to sign into the Web App:

Omnisient Web Application Login

Open your browser and navigate to the following URL:

ZA: <https://app.omnisient.com/login>

UAE: <https://uae.omnisient.com/login>

UK: <https://uk.omnisient.com/login>

It will render the login screen:



Your username will be provided by Omnisient Support team or your local administrator. The system will send you an email where you can reset your password. If you have lost your password, you can simply use the Forgot Password feature to reset your password.

API Key Setup

The first step is to set up an API key, which will give your server application access to upload files without login credentials. Once you have reset your password and you are able to log into the Omnisient Web App, either navigate to the Omnisient Core section and select the API Keys menu item, or click the link below:

ZA: <https://app.omnisient.com/admin/apikeys>

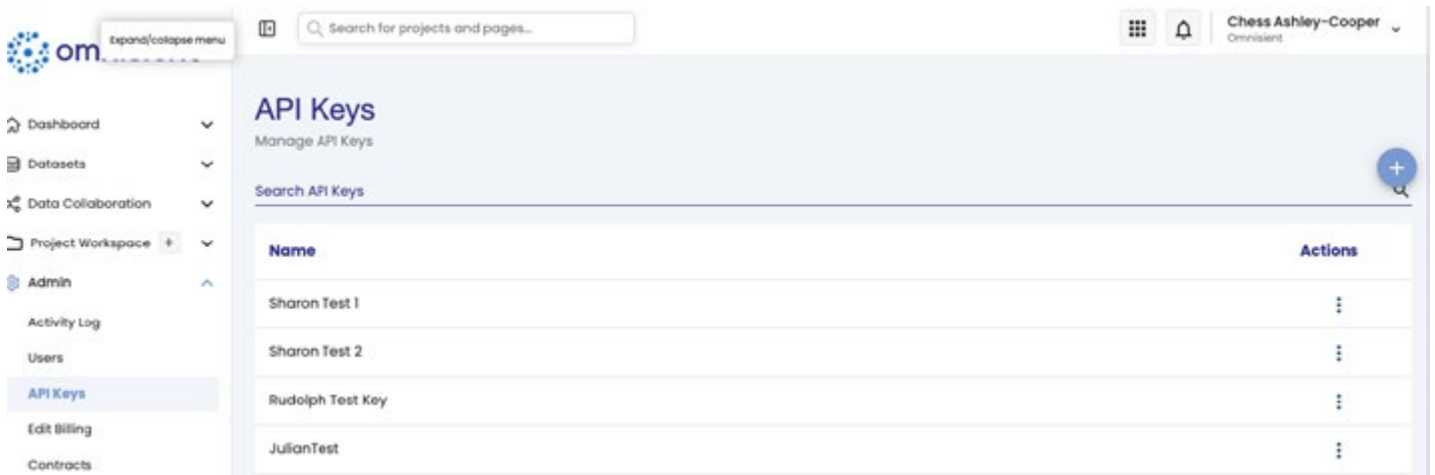
UAE: <https://uae.omnisient.com/admin/apikeys>

UK: <https://uk.omnisient.com/admin/apikeys>

You can add as many API keys as needed, but generally you just need one. You can revoke an API key at any time you want, but it will stop your server from processing new files.

Add a new API key by clicking the + icon: When adding a new API key, you need to name it for references purposes.

After providing the key and pressing Create, you will be issued with a pair of credentials:



IMPORTANT: You need to save the ID and Secret somewhere safe as you cannot retrieve them at a later stage. However, you can always create a new credentials pair.

Server Connect Application Setup

The next step is set up the server application, either for a Linux or a Windows environment:

Linux Version Setup

The example below is a bash script that will set up a Server Connect application on Ubuntu 22.04:

```
# Download latest packages and install .NET Core 6.0 SDK
sudo apt-get update
sudo apt-get install -y apt-transport-https sudo wget
https://packages.microsoft.com/config/ubuntu/22.04/packages-microsoft-prod.deb -O
packages-microsoft-prod.deb
sudo dpkg -i packages-microsoft-prod.deb sudo apt-get install dotnet-sdk-6.0
# We are going to work in our /opt directory. You can use any directory of your choice
cd /opt
# Downloads latest version
sudo wget https://api.omnisient.com/downloads/enterprisev2 sudo mv enterprisev2 enterprisev2.
zip
# Installs Unzip command
sudo apt-get install unzip
# Unzip Server Connect application
sudo unzip enterprisev2.zip -d enterprisev2
# Create savedata directory that will be used to save iURN's
sudo mkdir savedata
# Create uploaded files directory which will be used for your source files. This is only applicable if
you're using the CSV or PARQUET upload option. You can change the directory name to whatever
you want.
sudo mkdir uploaded files
```

```
# Give the user access to write to the directory
sudo chown -R ubuntu:ubuntu /opt/enterprisev2 cd enterprisev2
# Run the Server application with the configuration name as a parameter
sudo dotnet Intersect.Enterprise.Server.v2.dll [Configuration Name]
```

Run the Configurator on Linux

The example below is a bash script that will run the Configurator on Linux. It is based on the setup above:

```
# Change to the directory where the Configurator is located
cd /opt/enterprisev2/Config
# Run Configurator
sudo dotnet Intersect.Enterprise.Config.dll
```

It will start the Configurator and it you can access it on <http://localhost:5000> or <https://localhost:5001>. Make sure the port is open so you can access it. Alternatively, if you can not use that port, you can set up an instance on Nginx or Apache to proxy the website over port 80 or 443.

Windows Version Setup

You can download the application zip file from the following URL: <https://api.omnisient.com/downloads/enterprisev2> (+- 40MB download size).

Once downloaded, you need to unzip the zip file in its desired application.

The first step in setting up the server application, is to set up a configuration. You can run the configuration utility by navigating to the Config folder and clicking on the Config/Intersect.Enterprise.Config.exe application.

That will start a local web server and you can access the configuration utility by navigating to <https://localhost:5001>/<https://localhost:5000> on your web browser.

1. Set up Server Configuration
2. Authenticate and Configure
3. To authenticate you need to use the API ID and Secret as provided in Setup API Key.
4. Once you have provided the credentials click on the Authenticate button to proceed.
5. You can login to your instance with a username and password:

Data Source Configuration

You can set up the configuration details for your server. Currently we support 3 data source types:

1. CSV file type (most popular delimiters supported)
2. Parquet file type
3. Microsoft/Azure SQL Server
 - ◇ MySQL/MariaDB
 - ◇ PostgreSQL

CSV/Parquet Data Sources

For a CSV/Parquet data source, you need to configure the directory that will contain your CSV/Parquet files and the delimiter.

SQL Data Sources

For the SQL data sources, you need to provide the credentials by filling out the requested fields or you can enter the connection string in a .NET Core format.

For the SQL data sources, you can provide a database table as a data source or a SQL query. Do not use TOP or LIMIT in your SQL query.

You also need to choose your sequential column, which should be a number or date, so we can load the data in batches. The latest processed value will be saved to the database for when you load new data at a later stage.

The Upload Dataset Name will be your Dataset name as seen in the web application.

You need to decide if you want to save the iURNs for later identification. If you choose to save the iURN you need to specify the location, you would like to save the data. Be sure that the location has enough storage space similar in size to your source data.

Data Mapping Schemas

You need to choose the Data Mapping Schema. You can choose an existing data mapping schema, or you can create a new one by clicking on the Add button.

1. Depending on if you are uploading from a database or file, you can dynamically add the fields based on your source.
2. Enter the name for the schema and the notification user who will be emailed if any bad data exists or if your upload has completed.
3. Click on Import to import your fields from your source. If you are using a file to upload, choose the file you wish to upload. For best user experience make sure the file has as few rows possible as this process just needs the column headers.
4. If you wish to add the fields manually, then you can click on the Add button.
5. You should also indicate which fields are PII (Personal Identifiable Information) fields and then choose which kind of personal information the field contains.
6. You also need to specify a location where we can temporarily store the uploaded data, which we download from your data source and then anonymize and then upload to our platform.
7. The last option is if you would like to receive an email once a batch has been uploaded. This is only recommended if you do once-off uploads or not uploading data too often.

Once you have saved your configuration, you can always return to the configurator to make any changes.

Currently the server is built to run on a scheduled basis. You can use any scheduling tool or for once-off runs you can just run the command displayed in the information area:

[Server Application Path]\Intersect.Enterprise.Server.v2.exe [Your configuration name] For any further support, please email support@omnisient.com.

Anonymization and Upload Process

The Upload process is initiated by the command in the section above, either typed directly in a command line, or initiated by a script which can be scheduled at regular intervals.

Once initiated, the exact process as with the Omnisient Desktop Connect data onboarding application is executed. All the fields marked as PII (information that can uniquely identify an individual) are tokenised, anonymized and salted before any data leaves the client's server environment.

Only anonymized tokens are held on the Omnisient platform and used for analysis and campaigns.

All access to uploaded data is managed by the client as described in the data management section below. The system is built with privacy-by-design principles and will even detect potential personal information contained in fields not marked as PII by the client.

Anonymisation, Tokenisation and Upload Process

Omnisient is the inventor of the Secure Compounded Matching (SCM) Token process, a hybrid cloud approach using artificial intelligence to solve for issues relating to anonymisation & matching in privacy by design platforms. Using SCM, tokens can be matched across any PII field with security features iteratively embedded into the tokens to make them incredibly difficult to break. The technology is future proofed to accommodate for any new advancements in cryptography.

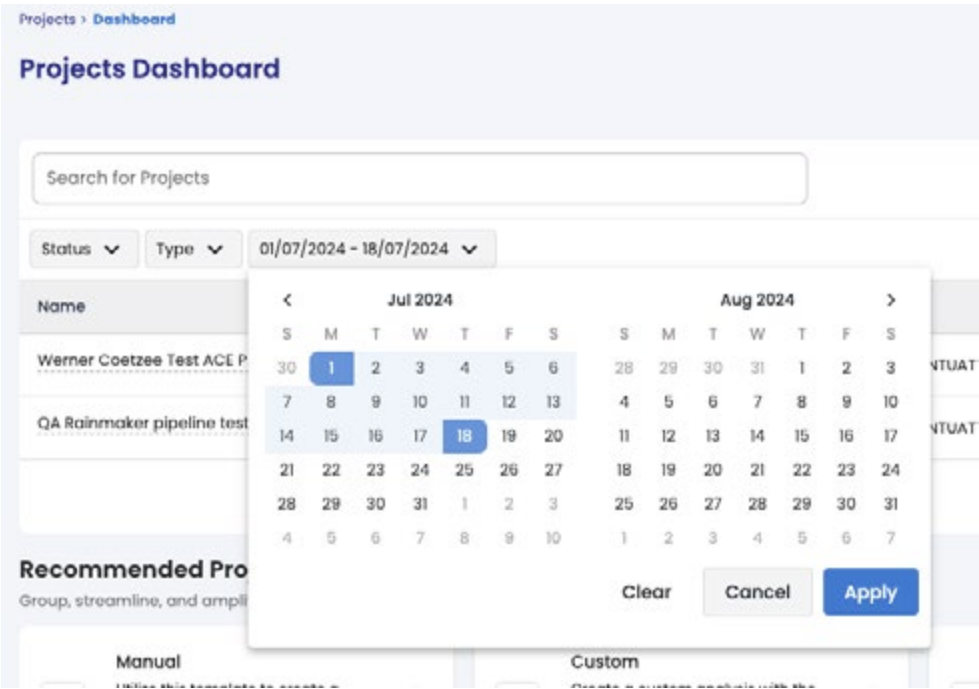
The process below is followed once Server Connect is started either manually, or via a scheduling tool at specified intervals:

Note that the data is hashed not only on the Client's premises but also once uploaded into the Omnisient cloud to ensure bad actors cannot re-identify any uploaded, tokenized, and hashed personal data.

Introducing Filters on the Projects Dashboard

Omnisient has introduced a new feature on the Projects Dashboard that enhances your ability to filter and view projects.

You can now apply filters based on date range, project type, and status, making it easier to manage and review your projects.



Step-by-Step Instructions to Use the Date Range Filter

Accessing the Projects Dashboard:

- Log in to your Omnisient account.
- Navigate to the Projects Dashboard from the main menu.

Using the Date Range Filter:

- On the Projects Dashboard, locate the filter options at the top of the page.
- Click on the Date Range filter.
- Select the desired start and end dates to view projects within that specific period.
- Apply the filter to update the project list accordingly.

Filtering by Project Type:

- Next to the Date Range filter, click on the Project Type dropdown menu.
- Select the type of projects you want to view (e.g., ACE Projects, Overlap Projects).
- Apply the filter to narrow down the project list to the selected type.

Filtering by Status:

- Locate the Status filter next to the Project Type filter.
- Choose the status of the projects you want to view (e.g., Active, Completed, Pending).
- Apply the filter to see projects that match the selected status.

Example Scenario

Suppose you want to view all completed ACE Projects from the past month:

- Select the date range covering the past month.
- Choose "ACE Projects" from the Project Type filter.
- Select "Completed" from the Status filter.
- The dashboard will now display only the projects that meet these criteria.

Tips and Best Practices

Combining Filters: Use multiple filters together to refine your search results and quickly find specific projects.

Regular Updates: Regularly update your filters to ensure you are viewing the most relevant and recent project data.

Save Filter Preferences: If possible, save your frequently used filter settings for quick access in future sessions.

Troubleshooting

Issue: Filters are not showing any results.

Solution: Ensure the date range, project type, and status filters are correctly set and that there are projects matching those criteria. Expand the date range or adjust the filters if necessary.

Conclusion

The new date range filter on the Omnisient Projects Dashboard significantly enhances your ability to manage and review projects efficiently. By applying filters for date range, project type, and status, you can easily locate and monitor projects that meet your specific criteria. This feature ensures a streamlined and effective project management experience. For any assistance, Omnisient support is always available to help.

Introducing Row Filtering in Dataset Sharing

Omnisient has introduced a powerful new feature: row filtering in dataset sharing. This enhancement allows you to apply simple or complex filters, or a combination of both, to segregate your data into specific rows of interest. This guide will explain how to use this feature effectively to refine your dataset-sharing process.

Step-by-Step Instructions

Applying Row Filters

- Access the Dataset Sharing Feature:
- Navigate to the Omnisient platform and log in using your credentials.
- Go to the 'Datasets' section from the main dashboard, and then click on 'prepared datasets'.

Select Your Dataset:

- Choose the dataset you wish to share.
- Open the Filter Configuration:
- Click on the 'Share dataset' option next to the dataset you want to share. This will open the dataset share configuration window.

Applying Simple Filters:

- In the filter configuration window, you can apply simple filters by specifying conditions such as equals, not equals, greater than, less than, etc.
- Example: To filter data where the 'Age' column is greater than 30, select 'Age' > '30'.

Applying Complex Filters:

- For more advanced filtering, use complex filters that combine multiple conditions using logical operators (AND, OR).
- Example: To filter data where 'Age' is greater than 30 and 'City' is 'Cape Town', you would combine the conditions: 'Age' > '30' AND 'City' = 'Cape Town'.

Combining Simple and Complex Filters:

- You can combine both simple and complex filters for granular control over your data.
- Example: ('Age' > 30 AND 'City' = 'Cape Town') OR ('Occupation' = 'Engineer').

Review and Apply Filters:

- Review the filters you have applied to ensure they meet your requirements.
- Click 'Verify' to view how many rows will be available from the filtering on your dataset.

Save and Share:

- Once the filters are applied, click share.
- Proceed to share the filtered dataset with your intended collaborators by following the usual sharing process on the platform.

Tips and Best Practices

Validate Your Filters: Before applying filters, preview a subset of your data to ensure the filters yield the desired results.

Documentation: Keep a record of the filters you apply for future reference and consistency.

Combining Filters: Use a combination of simple and complex filters to achieve precise data segmentation.

Troubleshooting

No Data Returned: If applying a filter returns no data, verify the conditions set in your filters. Ensure that there is data meeting the specified criteria.

Conclusion

Row filtering is a significant enhancement to the Omnisient dataset sharing capabilities, allowing for more refined and precise data segmentation. By following the steps outlined in this guide, you can efficiently apply simple and complex filters to your datasets, enhancing the value and relevance of the shared data.

For further assistance or inquiries, please refer to the detailed help centre available on the Omnisient platform or contact our support team on support@omnisient.com.

Introducing the “Custom” Project Template

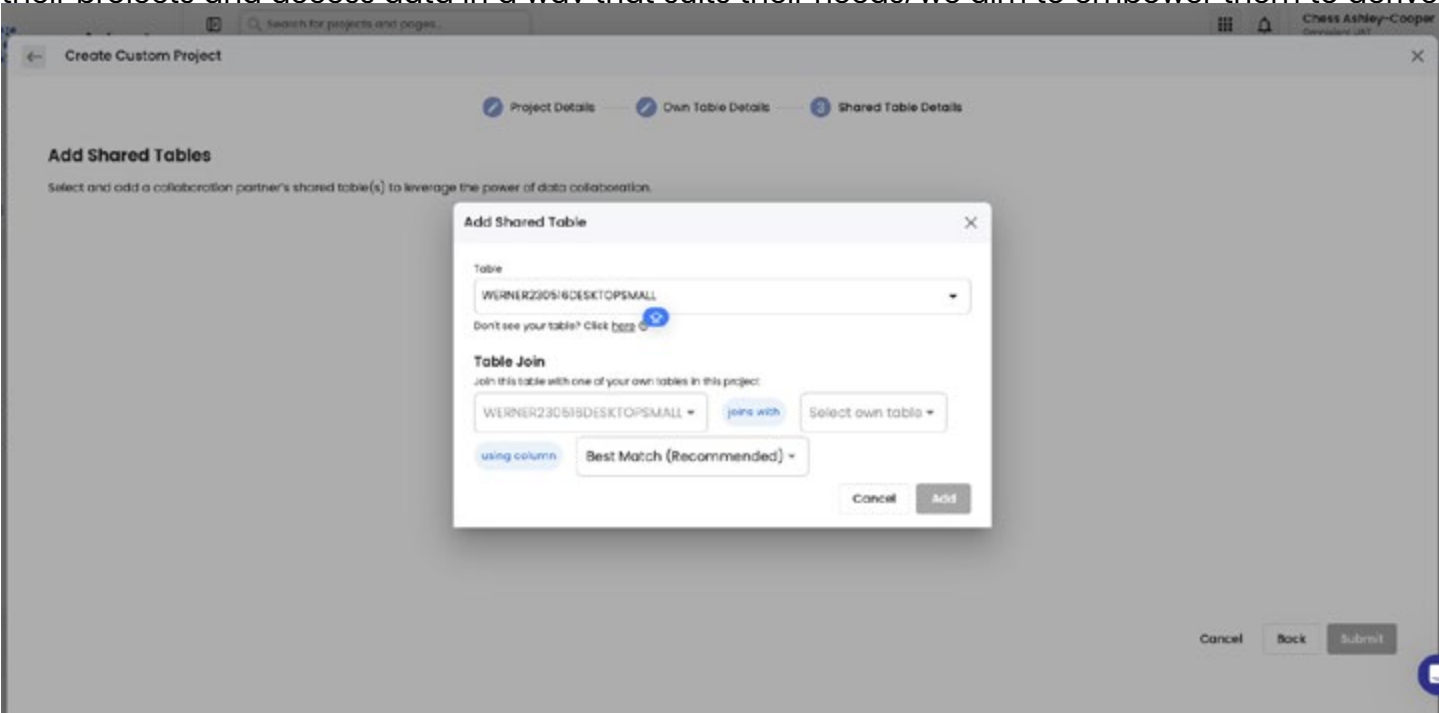
Tailored Projects for Enhanced Data Exploration

We’re excited to announce the launch of our newest project template: “Custom”. This template offers unparalleled flexibility, allowing users to incorporate their own tables and Dataset Shares into projects seamlessly.

Exploring Data with “Custom” Projects:

With the “Custom” project template, users have the freedom to add their own tables and Dataset Shares to the project, complete with joining tables. This empowers users to delve deeper into their data and shared information using familiar tools like SQL or Jupyter Notebook. Additionally, users can effortlessly add tables directly from the project detail dashboard, enhancing convenience and efficiency.

The introduction of the “Custom” project template marks a significant step in our commitment to providing tailored solutions for data exploration. By offering users the flexibility to customize their projects and access data in a way that suits their needs, we aim to empower them to derive



Introducing “View Relationships” Feature in Omnisient’s Project Detail Page

Gain Insights with Enhanced Table Relationships Visualization

We’re excited to announce the addition of the “View Relationships” button on the project detail page within Omnisient’s platform. This new feature offers users a streamlined way to explore the connections between various data tables in their projects. By clicking on this button, users can access the “Table Relationships” popup, providing a clear and comprehensive visualization of the relationships between all tables involved in the project.

Exploring Table Relationships:

With the “View Relationships” button, users can now delve deeper into the structure of their projects and gain valuable insights into how different tables are interconnected. This enhanced visualization empowers users to better understand the dependencies and associations between various data tables, facilitating more informed decision-making and analysis.

Conclusion:

The introduction of the “View Relationships” feature represents our commitment to continuously improving the user experience and providing valuable tools for data exploration and analysis. By offering a convenient way to visualize table relationships, we aim to empower users to make the most of their data and derive meaningful insights from their projects.

Selecting Data for Strive Universe Enrichment

When using an ACE report, users can select both the StriveURN and Client ID, along with other Client fields, for download

This selection is essential for sending data to the Strive Universe for enrichment purposes, and for receiving enriched data back from Strive, which includes the user’s own internal record identifier or Client Own ID.

Prerequisites

Ensure you have access to the Omnisient platform.

Be familiar with the data you need to select for the Strive Universe enrichment.

Step-by-Step Instructions

Accessing the ACE Report:

Log in to the Omnisient web application.

Navigate to the Projects section.

Select the ACE report you wish to work with.

Scroll to Selections

Click “Make Selection”

Selecting StriveURN and Client ID:

Select your own selection and the Strive selection

Click Next

New Selection

1 Selection Criteria 2 Selection Details

Selection Criteria

Define criteria against the datasets in this project to create a custom selection of data.

ben_bcp_test_202411	STRIVE_CORE	WERNER241028DESKTOP	WERNER241028DESKTOP
100 000	64 851 329	128	64 851 393
After Selection	After Selection	After Selection	After Selection
0	52 495 533	0	0

Columns

Category
Category_L, Category_M

Columns

Age
Age Group
Age Group5
Age Group3
Gender
Deceased indicator
Marital Status
Director
Entrepreneur
Email
Phone
Physical address

Columns

Company
Job title
Address Line 1
Address Line 2
City
Postal Code
Gender
Hobby
Language1
Location
OWNEREN COMKEY

Columns

IN STRIVE
IN CLIENT

Cancel **Next**

Define and capture the setup details for your custom selection.

- 4. Select the criteria – In this case, we used Saved for Own Use (include StriveURN)
- 5. Select Target and Control Save and click Next

New Selection

1 Selection Criteria 2 Selection Details

Selection Details

Define and capture the setup details for your custom selection.

Selection Name
Chess Demo

Selection Type
Save Criteria

Cancel Back **Create**

You will now be able to download your selections

Tips and Best Practices

Ensure Data Accuracy: Verify that all necessary fields are correctly selected and that the data being sent is accurate and up-to-date.

Troubleshooting

Missing Fields: If any fields, such as Client ID, are missing from your selection, check the dataset configuration and ensure these fields are included.

Data Transfer Issues: If there are issues in sending or receiving data, refer to the Omnisient help center or contact support for assistance.

Conclusion

Selecting and managing the correct data fields, such as StriveURN and Client ID, for Strive Universe enrichment is crucial for leveraging the full potential of your data insights. By following these steps, users can ensure a seamless process in data enrichment and utilization of the enriched data for their business needs.

For more detailed instructions, contact support for any specific queries.

Using Date Filters on the Projects Dashboard

To enhance the user experience and speed up the loading time on the Projects Dashboard, we have introduced a date filter feature.

This new filter allows users to view projects based on their creation date, enabling them to filter projects from the last 30 days, 6 months, or other specified time frames.

Prerequisites

Access to the Omnisient web application.

Projects created in the Omnisient platform.

Step-by-Step Instructions

Accessing the Projects Dashboard:

Log in to the Omnisient web application.

Navigate to the Projects section from the main menu.

Applying the Date Filter:

On the Projects Dashboard, locate the date filter options at the top of the page.

Choose the desired date range for filtering projects:

Last 30 Days: Displays projects created within the last 30 days.

Last 6 Months: Displays projects created within the last 6 months.

Custom Range: Select a custom date range to filter projects.

Viewing Filtered Projects:

After selecting the date range, the dashboard will automatically update to display only the projects that fall within the specified timeframe.

You can now view, manage, and interact with a more focused list of projects, improving efficiency and reducing loading times.

Adjusting the Date Filter:

If you need to adjust the date filter, simply select a different date range from the filter options.

The dashboard will refresh to show projects corresponding to the new date range.

Tips and Best Practices

Regular Updates: Regularly update the date filter to ensure you are viewing the most relevant and recent projects.

Custom Filters: Use the custom date range option for specific periods that are not covered by the predefined options.

Performance: Utilize the date filter to improve the dashboard performance, especially if you have a large number of projects.

Troubleshooting

No Projects Displayed: If no projects are displayed after applying a filter, ensure that there are projects created within the selected date range.

Filter Not Working: If the date filter does not seem to be working, try refreshing the page or clearing your browser cache. If the problem persists, contact Omnisient support.

Conclusion

The new date filter feature on the Projects Dashboard significantly improves the user experience by allowing users to quickly and easily filter projects based on their creation date. This enhancement ensures a more efficient and streamlined workflow, particularly for users managing a large number of projects.

Using Jupyter Notebook for packages /libraries management

This allows for efficient integration and self-service workflows using PIP. Here's how you can install packages using PIP in Jupyter Notebook:

Starting 30 September 2024, you will now be able to install your own packages/libraries for use in Jupyter Notebook, and the platform will no longer pre-install the packages on your behalf. This allows for faster integrations with the exact libraries and versions you wish to work with.

NOTE:

The installs do not persist across your different notebooks and will have to be run in a block at the beginning of the notebook.

How to Install Packages in Jupyter Notebook using PIP

Jupyter Notebook allows you to install and manage Python packages efficiently using PIP. This can speed up integrations and empower users with self-service capabilities. You can even install specific versions of libraries to ensure compatibility with your projects.

Step-by-step Guide

Open your Jupyter Notebook:

Launch Jupyter Notebook from the Omnisient web app

Insert a new code cell:

Click on a new cell or press B to create a new code block.

Install a package using PIP:

In the code cell, type the following command to install any package:

!pip install <package_name>

For example, to install the pandas package, use:

!pip install pandas

Install a specific version of a package:

If you want to install a particular version of a package, specify the version number in your command. For example:

!pip install pandas==1.3.3

Run the cell:

Press Shift + Enter to execute the command and install the package.

Jupyter will display the installation progress in the output below the code cell.

Verify the installation:

You can verify that the package was installed successfully by importing it into a new cell:

```
import pandas as pd
```

Available Libraries

pyodbc

pandas

scikit-learn

sweetviz

xgboost

category_encoders

toad

optbinning

ydata-profiling[notebook]

imbalanced-learn

mlxtend
shap
requests
tabulate
duckdb
seaborn
scipy
pandas
matplotlib
pydantic
PyYAML
jinja2
visions
numpy
htmlmin
phik
requests
tqdm
seaborn
multimethod
statsmodels
typeguard
imagehash
wordcloud
dacite
numba
Boruta
polars
feature-engine
pyarrow
woe
catboost

Best Practices

Check package compatibility: Before installing, make sure the package version is compatible with your environment or other libraries you are using.

Troubleshooting

Permission denied error: If you encounter a permission issue, try adding the `--user` flag to your command:

python
Copy code
`!pip install --user <package_name>`

Package not found: If PIP is unable to find the package, make sure that the package name is spelled correctly, or that it exists in the Python Package Index (PyPI).

By following these steps, you can quickly install and manage the libraries you need for your projects, empowering faster integrations and more flexible, self-service development workflows.

For more detailed information or assistance, please refer to the Omnisient help centre (help.omnisient.com) or contact support.

Deprecation of the Platform Stats Feature

We are officially deprecating the Platform Stats Feature.

As Omnisient continues to evolve and optimize its platform, we are constantly reviewing and updating our features to better serve our users. In line with this commitment, the Platform Stats feature is no longer actively supported and will be retired to allow us to focus on updated functionality that delivers greater value and flexibility.

Impact on Users

The deprecation of the Platform Stats feature means that users will no longer have access to the built-in analytics that provided platform-wide usage metrics and aggregated data insights. This change allows Omnisient to reallocate resources toward improving and expanding other critical features.

Transition Plan

To ensure a smooth transition, the following steps will be taken:

Notification: All users will be notified of the deprecation via direct communication (email) and a formal announcement on the platform.

Final Access: The Platform Stats feature will be available for a limited period to give users the opportunity to download or document any important data. After this period, the feature will be permanently removed from the platform.

Enhanced Functionality: We are actively developing more advanced reporting and data visualization tools to replace the functionality previously provided by Platform Stats, offering users better control and more detailed analytics.

Support: Our account managers and support team are available to guide users through this transition, providing recommendations on alternative methods to monitor performance and access data insights.

Moving Forward

We encourage users to contact our account managers for more personalized support during this transition. Our focus on retiring outdated features like Platform Stats allows us to channel resources into enhanced, more powerful tools that will better meet the demands of our users.

Conclusion

As Omnisient continues to improve and expand its platform, the deprecation of the Platform Stats feature is a necessary step to support our ongoing innovation. We remain committed to providing you with the best possible tools and are here to assist you through this transition.

For further assistance or inquiries, please reach out to our support team.

Deprecation of the Tenant Overlaps Feature

We are officially deprecating the Tenant Overlaps Feature.

As Omnisient continues to evolve and optimize its platform, we are constantly reviewing and updating our features to better serve our users. In line with this commitment, we are officially deprecating the Tenant Overlaps feature from our platform.

Impact on Users

The deprecation of the Tenant Overlaps feature means that users will no longer be able to access or utilize this functionality to view or manage overlapping data sets across multiple tenants within the platform. This change is part of our ongoing efforts to streamline the platform and focus on features that offer the most value to our user base.

Transition Plan

To ensure a smooth transition, the following steps will be taken:

Notification: All users will be notified of the change through direct communication (email) and an official announcement on the platform.

Grace Period: We will provide a grace period during which users can continue using the Tenant Overlaps feature while transitioning to alternative solutions.

Support: Our support team and account managers will be available to assist users in finding alternative ways to achieve their goals without this feature.

Moving Forward

We encourage users to contact our account managers directly for personalized support. This shift allows us to focus on providing more tailored and legally robust solutions that align with users' specific needs. We are committed to ensuring that this change does not disrupt your workflow and will work closely with you to minimize any inconvenience.

Conclusion

As always, we are here to support you through this transition and are committed to continuously improving the Omnisient platform. The decision to deprecate the Tenant Overlaps feature is part of our broader strategy to enhance platform performance and user experience.

For further assistance or inquiries regarding this change, please contact our support team.

Introducing the Enhanced Omnisient Dashboard: Interactive, Customizable, and User-Centric

Our latest Omnisient dashboard update brings a dynamic, interactive, and customizable experience that enhances data access and insights.

Our latest Omnisient dashboard update brings a dynamic, interactive, and customizable experience that enhances data access and insights. The new design focuses on increasing your awareness of notifications, presenting crucial data trends, and empowering users to tailor the interface to meet specific needs.

Key Features of the Enhanced Dashboard

1. Interactive Visual Data

The updated dashboard now includes a variety of dynamic charts, including:

Industry Datasets: Visualize key industry data trends to gain insights faster.

Unique Tokens: Track unique tokens at a glance, making it easier to monitor token-related activity.

Dataset Reviews: Quickly assess and review datasets directly from the dashboard for enhanced data oversight.

These visualizations make it easier to analyze trends and gain actionable insights.

2. Activity and Dataset Monitoring

Activity Review: Monitor recent activities across datasets, ensuring you stay up-to-date with the latest changes and collaborations.

Recently Available Datasets: A dedicated section displays datasets recently added to the platform, allowing for quick identification of new resources.

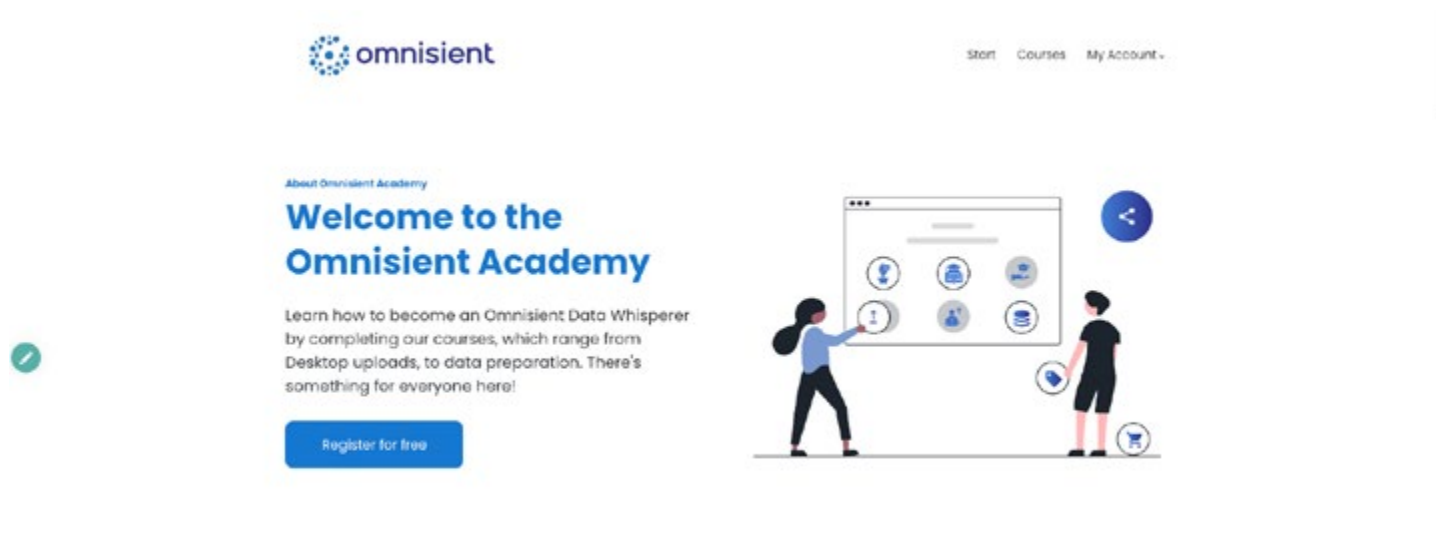
3. Notification Awareness

Notifications are now more prominent, helping you quickly spot important alerts and updates. This enhanced notification system reduces the chances of missing essential information, keeping you informed and responsive.

4. Customizable Widgets and Request Portal

To make the dashboard truly yours, we've introduced a customizable widget section. You can request specific widgets to be added by visiting our feature request page on the Omnisient Chatbot. We encourage you to submit requests as we continue to refine and expand the dashboard's functionality, ensuring it meets evolving user needs.

The enhanced Omnisient dashboard combines interactivity, customization, and seamless data access, supporting a streamlined, user-focused experience. We invite you to explore these new features and provide feedback to help us make it even better.



Introducing Omnisent Academy:

A Hub for Mastering Data Collaboration and Privacy

Omnisent Academy is the gateway for users to unlock the full potential of the Omnisent platform. This educational resource is crafted to empower users with knowledge and tools for privacy-compliant data collaboration. It ensures adherence to data privacy regulations like GDPR and POPIA by leveraging advanced privacy-enhancing technologies, including Secure Multi-Party Computation (SMPC) and tokenization.

Whether you're a data analyst, business user, or technical expert, Omnisent Academy offers tailored learning paths to simplify data preparation, manage datasets, and create impactful projects.

Key Features of Omnisent Academy

Comprehensive Learning Modules

Omnisent Academy provides step-by-step tutorials, project templates, and best practices to enable users to:

Prepare datasets with SQL Pad or Jupyter Notebook.

Perform overlap analysis to identify collaboration opportunities.

Utilize ACE (Anonymised Campaign Engine) for generating anonymized, actionable insights.

Privacy-First Collaboration

By focusing on tokenization and anonymization, the academy emphasizes methods for securely collaborating on sensitive consumer data without exposing Personally Identifiable Information (PII).

Diverse Analytical Tools

The platform's analytics ecosystem supports:

Overlap analysis for partnership opportunities.

Detailed reports including demographic, lifestyle, and career insights.

Audience segmentation for targeted campaigns.

How Omnisent Academy Supports Users

Step-by-Step Guides: Detailed instructions for using data preparation tools like SQL Pad and configuring data sharing settings.

Templates for Quick Start: Pre-built project templates for overlap analysis and ACE reports streamline project creation.

Interactive Tutorials: Video content and walkthroughs demystify complex operations.

Compliance Guidance: Ensure all workflows align with GDPR and POPIA requirements.

Why Choose Omnisent Academy?

Enhanced Efficiency: Accelerates user onboarding and operational proficiency.


Increased Data Utility: Learn to maximize insights from Dataset Shares without compromising privacy.

Regulatory Compliance: Stay informed about best practices for global data privacy standards.

Conclusion

Omnisient Academy is more than just a learning portal; it's a key driver for enabling secure, efficient, and privacy-compliant data collaboration. By equipping users with the right tools and insights, Omnisient Academy ensures a seamless and impactful user experience. Explore the academy today to transform your approach to data sharing and analytics.

For additional guidance, visit the Omnisient Help Center or contact support at support@omnisient.com.




Start Courses My Account


About Omnisient Academy

Welcome to the Omnisient Academy

Learn how to become an Omnisient Data Whisperer by completing our courses, which range from Desktop uploads, to data preparation. There's something for everyone here!

Register for free





Courses

What courses are available?

We offer a variety of courses, ranging from Desktop Connect, to creating projects and data preparation.

- ✓ [Uploading data securely with Desktop Connect](#)
- ✓ [Create an Overlap Project](#)
- ✓ [Create an ACE Project](#)
- ✓ [Financial Inclusion Project](#)

Your coaches

We are here to help you

The coaches available in the Omnisient Academy serve a supportive role in guiding users through various features and processes on the platform. They help in the following ways:

Project Support: Coaches assist users in creating and managing projects within the platform, including data preparation, selecting project templates (like ACE reports or Overlap Projects), and analyzing datasets. They provide step-by-step instructions to ensure users can efficiently handle their data.

Training and Onboarding: Through training videos and onboarding sessions, coaches provide

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Retaining Widget Selection on the Dashboard

This document outlines the behavior of retaining widget selections on the Omnisient dashboard.

When a user selects a widget and navigates away using a quick link, the system ensures that the selected widget remains saved. Upon returning to the dashboard, the previously selected widget is still retained, providing a seamless and consistent user experience.



Key Features

Widget Selection Persistence

When a user selects a widget, the selection is saved in the session or local storage depending on the application's architecture.

This ensures the selected widget remains active even when navigating to other parts of the platform.

Quick Link Navigation

Users can navigate to quick links from the dashboard without losing their widget selection.

The system temporarily stores the state of the dashboard, including the selected widget, during the navigation.

Dashboard Return Behavior

When the user returns to the dashboard, the previously selected widget is displayed as it was before navigating away.

The widget remains in the same state, including any filters or configurations applied by the user.

Displaying Top 10 Recent Projects in Omnisent

This document outlines how Omnisent displays the top 10 recent projects on its platform.

The focus is on maintaining clear visibility of project names, accurately presenting metadata, and ensuring seamless functionality and user experience.

Key Display Elements

Project Name

Full project names are displayed whenever possible.

For long names, truncation with ellipses (...) is used to prevent layout disruption.

A tooltip provides the full project name when hovered over.

Status Badge

Statuses such as Active, Processing, Awaiting Approval, and Failed are shown as badges.

Distinct colors differentiate the statuses for easy recognition.

Date

The creation or last updated date is displayed in the format DD MMM YYYY (e.g., 12 Nov 2024).

Datasets Count

The number of associated datasets is indicated with labels like 2 dataset(s).

Assigned Users

For exactly two users, their names are listed directly.

For more than two users, the first two are shown, followed by a label like + x others (e.g., John, Jane + 2 others).

Open Project Link

A visible and functional "Open Project" link is included for accessible projects.

For Awaiting Approval and Failed statuses, the link is disabled, and a tooltip explains the restricted access.

Technical Implementation

Data Accuracy

Metadata such as dataset counts and user assignments matches the backend records.

Routing

Each project link routes users to its respective project page.

Fallback error handling is implemented for unavailable pages.

UI Overflow Handling

The layout adjusts dynamically to handle overflow:

Horizontal scrolling is used for long lists.

Truncated names and badges maintain uniformity.

Best Practices

User Visibility: Clear visual hierarchy ensures users can quickly identify project details.

Error Handling: Scenarios like missing metadata or inactive links are managed gracefully.

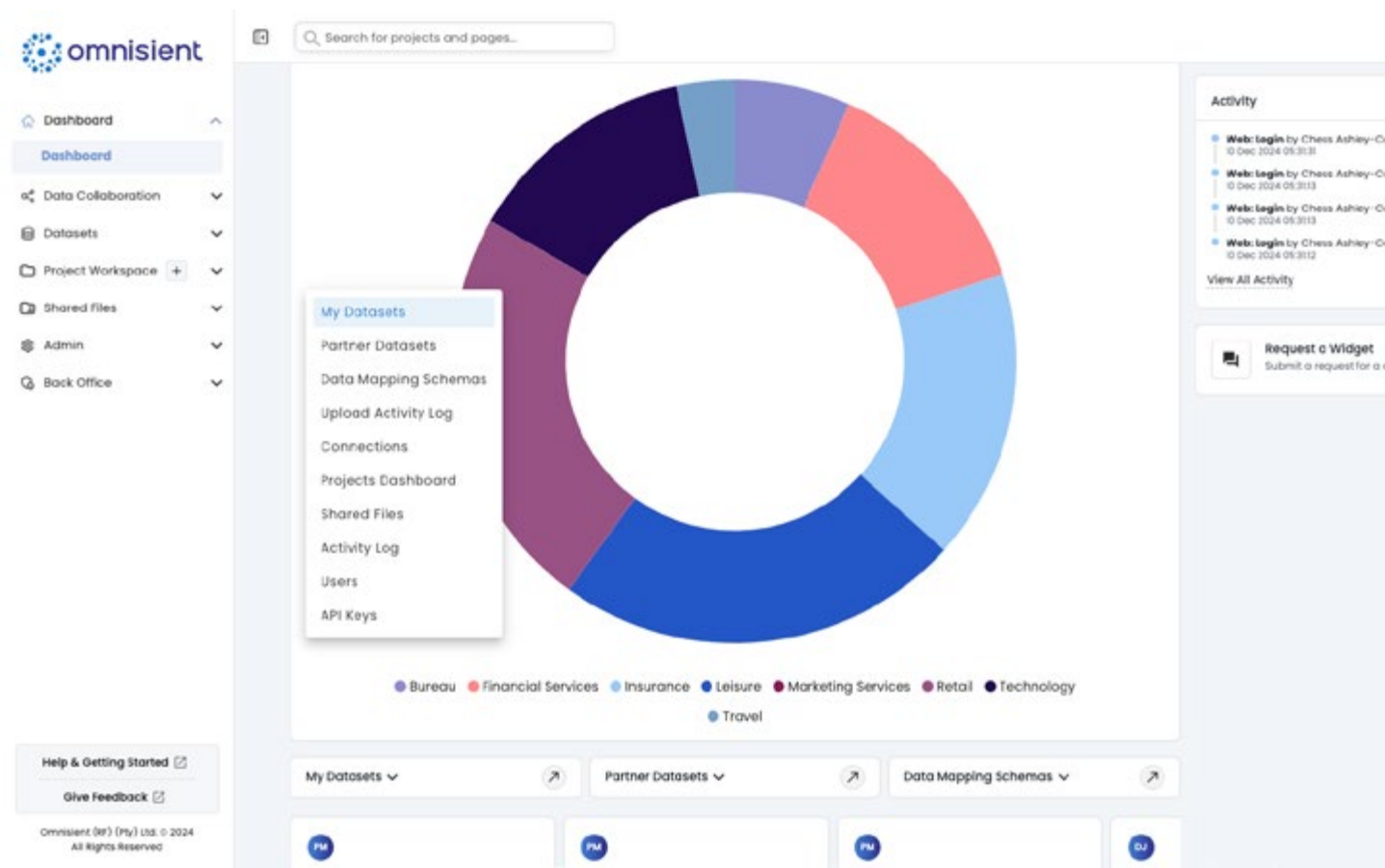
Consistent Design: A unified appearance across all projects enhances user experience.

Conclusion

By following these practices, Omnisient maintains a user-friendly and visually organized interface for managing and accessing recent projects. These features improve clarity, functionality, and engagement while upholding the platform’s secure and professional standards.

Saving Your Top 3 Quick Links

This feature allows users to save their top three quick links for easy access. Users can select their preferred quick links from dropdown menus, ensuring a personalized and efficient dashboard experience.



Step-by-Step Instructions

Accessing Quick Link Selection

Navigate to the Quick Links section on the dashboard.

Locate the dropdown menus for quick link selection.

Selecting Quick Links

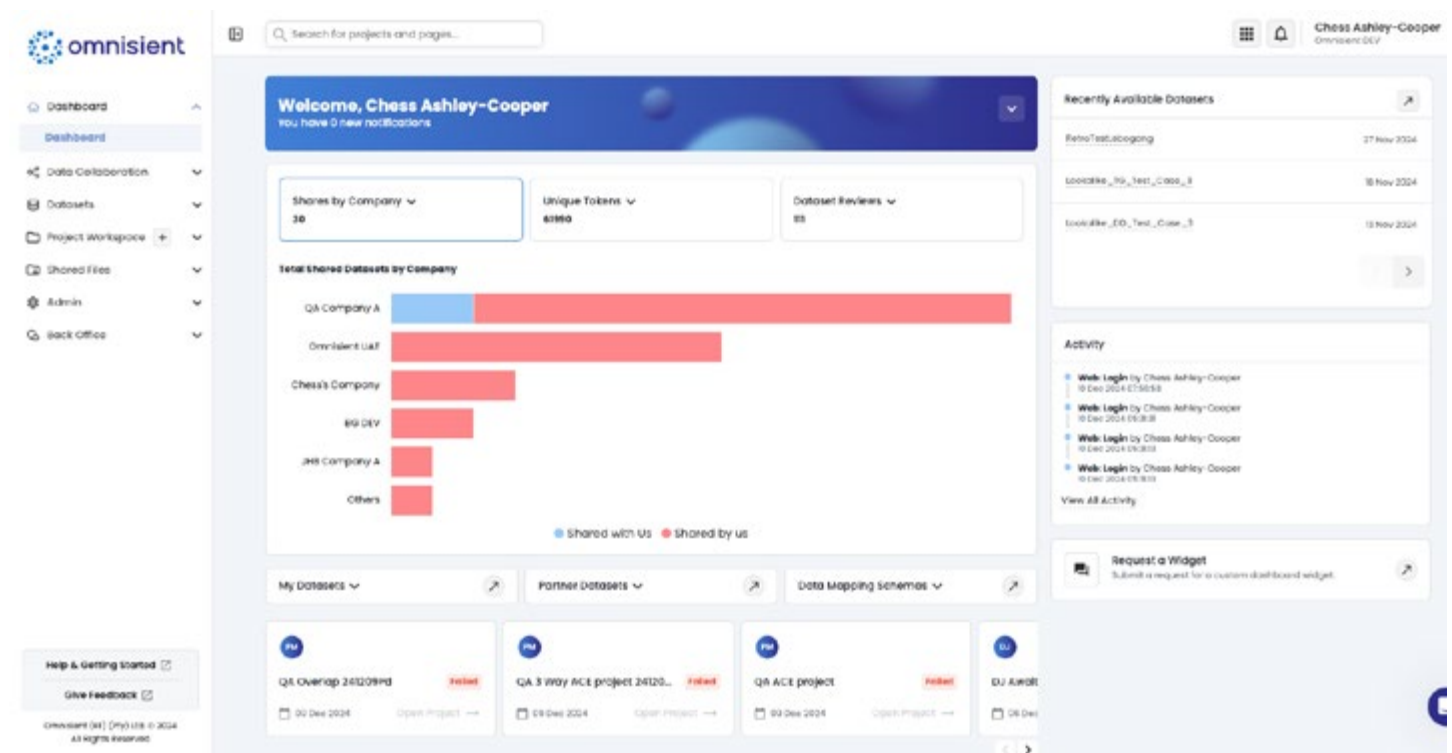
Click on the first dropdown menu and choose your preferred link from the available options.

Repeat the process for the second and third dropdowns to select additional quick links.

Using Your Saved Quick Links

Your saved quick links will now appear at the top of the dashboard for quick access.

Click on any of the saved links to navigate to the corresponding page or feature.



Example Graph Representation

The bar graph includes:

- Company A: 15 datasets shared
- Company B: 8 datasets shared
- Company C: 5 datasets shared
- Tip: Hover over the bars for precise dataset counts and additional information about each share.

Conclusion

The “Shares by Company” filter provides a visual summary of your collaborations, empowering you to track and manage data shares efficiently. With its intuitive bar graph, users can gain actionable insights into their data-sharing ecosystem.

Get Your Data Ready for Meta Ad Account Activations

Omnisient is excited to announce the launch of Meta ad account activations, starting soon.

This new capability will allow users to select data on the Omnisient platform and securely share it with Meta as an audience for ad campaigns. To prepare, we’ve added a new “campaign activation” setting in the Desktop Connect and Server Connect tools for data uploads.

What Does This Mean for You?

You can now upload customer activation for direct use in Meta ad campaigns. This update enables seamless audience creation while adhering to Omnisient’s privacy-by-design principles.

New Fields for Data Uploads

To support Meta ad activations, the following fields are now available for selection:

- Email
- Phone
- First Name
- Last Name
- MAID (Mobile Advertising ID): Unique identifier for a mobile device.
- GAID (Google Advertising ID): Unique identifier for Android devices.
- IDFA (Identifier for Advertisers): Unique identifier for iOS devices.

How to Prepare Your Data

Enable the “Campaign Activation” Setting:

While uploading customer data in Desktop Connect or Server Connect, choose the “campaign activation” toggle.

This ensures your data is properly configured for ad activations.

Include the Required Columns:

Prepare your data to include any of the supported fields:

Email, Phone, First Name, Last Name

MAID, GAID, or IDFA for mobile-specific targeting

Upload Your Data:

Follow Omnisient’s secure upload processes via the Desktop or Server Connect tools. Ensure data files meet the required formatting standards outlined in the user guides.

Why This Update Matters

This streamlined process sets you up for success in reaching your target audience on Meta platforms. By leveraging encrypted and anonymized data, you’ll maintain compliance with privacy regulations while executing highly targeted campaigns.

If you have any questions or need assistance, reach out to the Omnisient support team or consult the user manuals for step-by-step instructions.

How to Effectively Manage Your Jupyter Environment

Managing your Jupyter environment within the Omnisient platform is essential for optimizing your data preparation and analysis workflows.

Managing your Jupyter environment on the Omnisient platform is key to optimizing your workflows and ensuring smooth data preparation and analysis. With enhancements like real-time resource monitoring, you’ll have even greater control over your environment.

Understanding the Jupyter Environment on Omnisient

1. Isolated User Environments

Each user has their own Jupyter environment, providing:

- Privacy: You won't see others' work, ensuring a clean and focused workspace.
- Control: Fully customize your environment for project-specific needs.

2. Resource Allocation (Beta)

Users can now adjust Jupyter's resource allocation to match task needs. There is no cost associated with the different pod sizes in our Beta mode, but this will change in the future.

- Smaller allocations save costs.
- Larger allocations handle more demanding computations.

Available Workspace Options:

Workspace Type	CPUs	Memory (RAM)
Standard	2	8GB
Medium	4	32GB
Large	6	50GB

Note: Beta features may change throughout the testing period. Once Beta ends, pricing will be updated.

Managing Data and Resources

Deleting Tables from the Data Warehouse

Follow these steps to remove unneeded tables and keep your workspace tidy:

- Access the Dataset Dashboard:
- Log in to your Omnisient account and navigate to the "Datasets" section.
- Find the Table:
- Use search or filters to locate the specific table.
- Delete the Table:
- Click the three-dot menu next to the table and select Delete.
- Confirm the Action:
- Double-check before confirming deletion, as it cannot be reversed.

Memory Allocation

- Each Jupyter session has a predefined memory limit. Exceeding this limit will result in errors. Best practices include:
- Loading only necessary data into memory.
- Saving intermediate outputs to the data warehouse to free up resources.

Tips for Effective Environment Management

Leverage Resource Monitoring:

Once the taskbar utilization feature is available, use it to track memory and CPU usage in real time.

Optimize Code:

Regularly clean up unused variables using Python's del function or restart the kernel to clear memory.

Use memory-efficient libraries like pandas-profiling to review data statistics without loading the entire dataset.

Work with Manageable Data Sizes:

Process large datasets in chunks or use SQL queries to filter data before loading it into memory.

Optimizing Memory Usage

Each Jupyter session has a predefined memory limit. If you exceed this limit, you may experience errors. Best practices:

Load only necessary data into memory.

Use SQL queries to filter data before loading it into Jupyter.

Regularly clear memory using del statements or restarting the kernel.

Troubleshooting

Resource Errors:

Monitor your taskbar for memory or CPU overutilization.

Split large tasks into smaller, manageable steps.

Restoring Deleted Data:

If you've accidentally deleted a table, reach out to Omnisient support for assistance.

With the real-time monitoring feature and these best practices, you can maintain an efficient and productive Jupyter environment on the Omnisient platform. For additional help, check the platform's documentation or contact support.

Add Additional Own Datasets to an Existing Financial Inclusion Project

Users can now add additional own datasets to an existing Financial Inclusion project.

We're excited to introduce a new enhancement to Financial Inclusion Projects on the Omnisient platform! Users can now add additional own datasets to an existing project, providing greater flexibility and deeper insights without having to create a new project from scratch.

How to Add Additional Datasets to an Existing Financial Inclusion Project

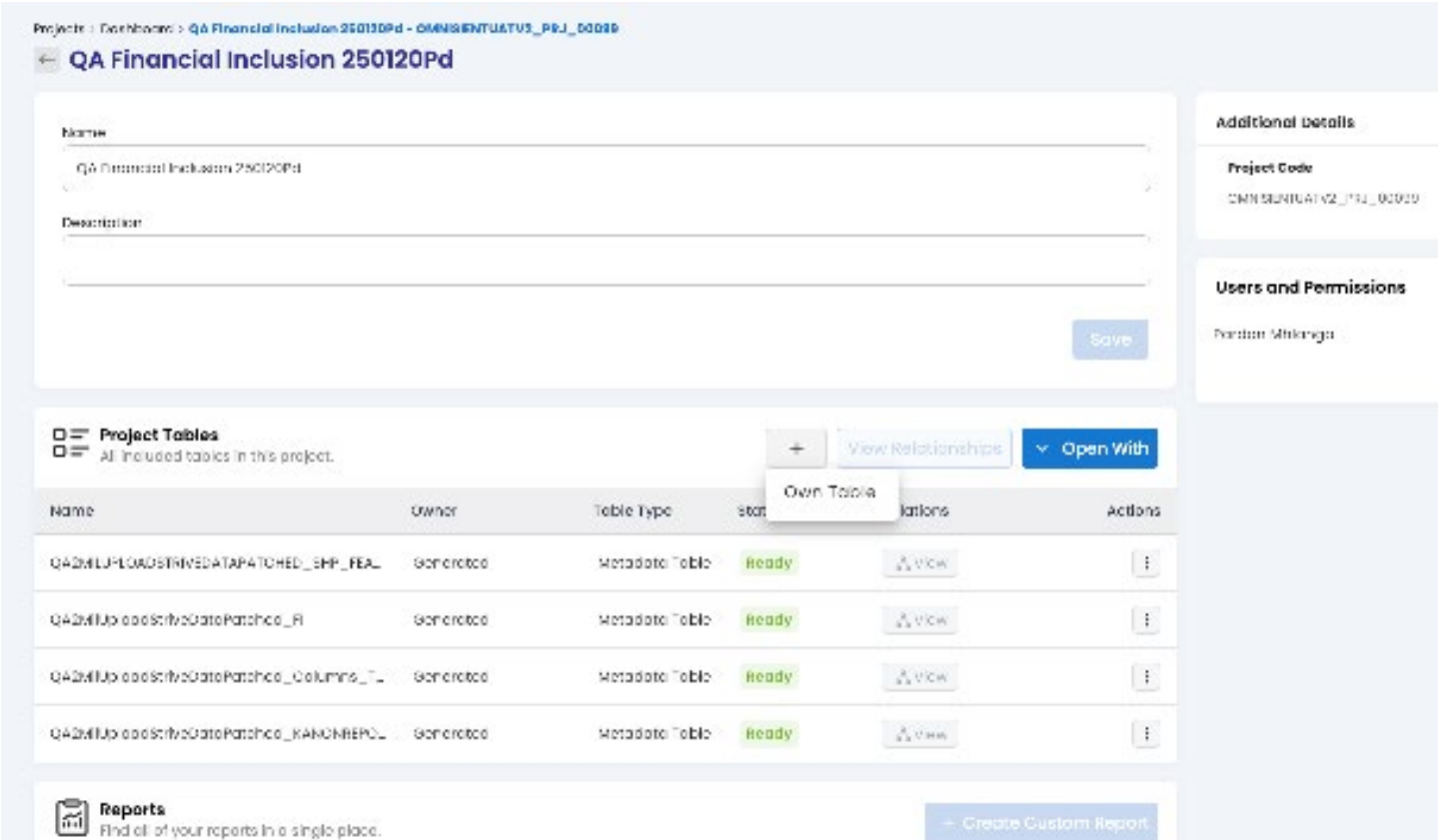
1. Access Your Financial Inclusion Project

Log in to Omnisient.

Navigate to Projects.

Select your Financial Inclusion Project from the list.

2. Open the “Project Tables” Section



3. Add Your Own Dataset

Click Add Dataset and select Own Table.
Choose the dataset from your prepared datasets list.

4. Define Dataset Mapping & Matching Criteria

Configure matching columns for overlap analysis or insights.
Choose between Match Field or Best Match depending on your requirements.

5. Review & Submit

Verify dataset details and mapping.
Click Add to add the dataset to your Financial Inclusion Project.
The system will process the dataset and update the project accordingly.

Key Benefits of This Enhancement

- Greater Flexibility: No need to create a new project when new data becomes available.
- Deeper Insights: Enrich your analysis with multiple datasets for a comprehensive view.
- Seamless Integration: Effortlessly merge datasets without disrupting existing configurations.

Meta Ad Activations on the Omnisient Platform

This guide walks you through the steps required to connect your Meta (Facebook) ad account with the Omnisient platform and activate selections for campaigns. By following these steps, you will be able to integrate your Meta Ad account, create audience selections, and activate them for targeted advertising.

Step 1: Connect Your Facebook Ad Account

Navigate to Admin > Ad Accounts in the Omnisient platform.

Follow the on-screen prompts in the pop-up window to log in and authorize your Facebook account.

Once successfully connected, select the specific ad account from your Facebook profile that you wish to link.

Step 2: Create a Selection for Activation

Go to the Projects section and select the project where you want to create a new audience selection for Meta Ads.

Create your selection by defining the target audience based on the available datasets and parameters.

Ensure that you mark the selection as "Use for Activation" to make it available for activation.

Step 3: Activate Your Selection

Once the selection is created and marked for activation, it will be available under the Selections section in your project dashboard.

This selection can now be used for executing campaigns on Facebook and Instagram via your linked Meta Ad account.

Activating Your Selection for Meta Ads

Step 4: Open and Configure Your Selection

- Access Your Selection
- Navigate to the Selections section of your project dashboard.
- Locate the selection you previously marked as "Use for Activation."
- Click on "View" to open the selection details.
- Go to Activation Channels
- Once inside your selection, browse to the Activation Channels section.
- Here, you will see the available options for ad activations, which for now is Meta (Facebook and Instagram).
- Select Your Meta Ad Account
- Choose the Facebook/Instagram ad account that you previously connected under Admin > Ad Accounts.
- If you have multiple accounts linked, ensure you select the correct one for this campaign.
- Assign a Friendly Name
- Give your activation a friendly name to easily identify it later.

This is useful for tracking multiple activations across different projects.

- Select Matching Fields

- Choose which data fields you want to use for audience matching on Meta.

Available options include:

- Email
- Mobile Advertising ID (MAID)
- Phone Number
- Other available identifiers

Ensure that your selected fields align with Meta's audience matching capabilities for best results.

Conclusion

By integrating your Meta Ad account with Omnisient, you can securely create and activate audience selections for advertising while maintaining privacy compliance. If you encounter any issues, ensure that your Facebook permissions are correctly set, or contact Omnisient support for assistance.

Column Matching in the Omnisient Platform

Column Matching is a core feature of the Omnisient platform that allows users to compare and find common data points between multiple datasets.

What is Column Matching?

Column Matching is a core feature of the Omnisient platform that allows users to compare and find common data points between multiple datasets. This process enables businesses to securely collaborate on data without exposing personally identifiable information (PII).

How Does Column Matching Work?

Uploading Datasets:

Users upload datasets to the Omnisient platform via the Desktop Connect or Server Connect application.

Data is anonymized and tokenized before being processed.

Selecting Matching Columns:

Users choose specific columns for matching, typically fields containing encrypted identifiers.

Matching can be done on direct matches or "best match" scenarios for fields like names, phone numbers, or addresses.

Overlap Matching & Early Warnings:

Omnisient's Overlap Project feature allows users to compare their dataset with another dataset to identify common records.

A warning system alerts users if there are no common PII fields between datasets, preventing unnecessary processing.

Transforming Data for Matching:

Data undergoes validation, standardization, and tokenization to ensure a secure matching process.

Errors in PII fields are flagged so users can clean and re-upload data if necessary.

Processing the Match:

The system processes the overlap and generates insights on the matched records.

Users can then use the matched data for further analysis or collaboration without ever exchanging raw data.

Benefits of Column Matching

Enhanced Privacy: All PII data is anonymized and tokenized before processing, ensuring compliance with data privacy laws.

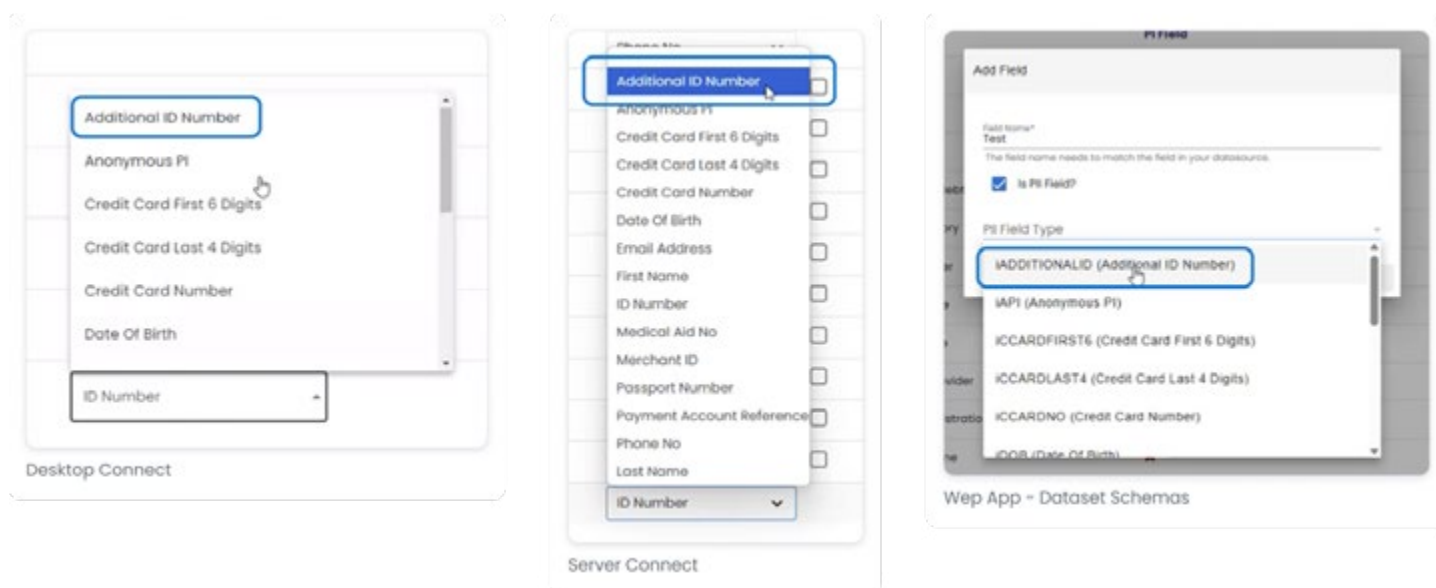
Seamless Collaboration: Organizations can share insights without exposing raw data.

Efficiency: The early warning system prevents mismatches and improves overall match accuracy.

If you need assistance setting up a dataset match don't hesitate to contact support.

PII Category: Additional ID Number

Omnisient has introduced Additional ID Number as a new category of Personally Identifiable Information (PII) across its apps and platform.



Omnisient has expanded its Personally Identifiable Information (PII) classification use cases. The following new PII fields are now available across our apps and platform:

Additional ID Number

This update supports the use of multiple ID Number columns, enabling scenarios such as linking medical aid dependents or spouses.

What This Means for Users

1. Support for Multiple ID Numbers

Users can now select one primary ID Number and multiple Additional ID Number fields during dataset uploads, improving flexibility for complex identity use cases.

2. Seamless Platform Integration

The new “Additional ID Number” field is available across the platform, including:

Classifying PII fields in **Desktop Connect**

Configuring schemas in **Server Connect**

Adding or editing schemas in the **Web App**

3. Privacy-First Data Handling

All ID numbers – primary and additional – are fully anonymized and tokenized before leaving the user’s environment, secured by Omnisient’s Secure Multi-Party Computation (SMPC) framework, ensuring they are never shared in raw form.

Next Steps for Users

- **Review Your Datasets** – Update your **dataset schemas** to classify these fields correctly.
- **Update Data Mapping & Upload Processes** – Ensure that these fields are correctly mapped and tokenized before use in any analysis or collaboration.

Introducing the Enhanced Selection Builder

Build smarter, faster, and more flexible selections with our upgraded tools.

Creating precise selections has never been easier. We’ve updated the Selection Builder with a sleek new interface and powerful new capabilities to help you build complex queries effortlessly.

Quick Summary

- Brand-new user interface
- Use AND, OR, and nested logic
- Filter by text, numbers, and dates
- Combine multiple tables – no limit!
- Faster and more intuitive performance

A Cleaner UI

We’ve streamlined the interface for easier selection building. Navigate and build queries more naturally with our intuitive layout.

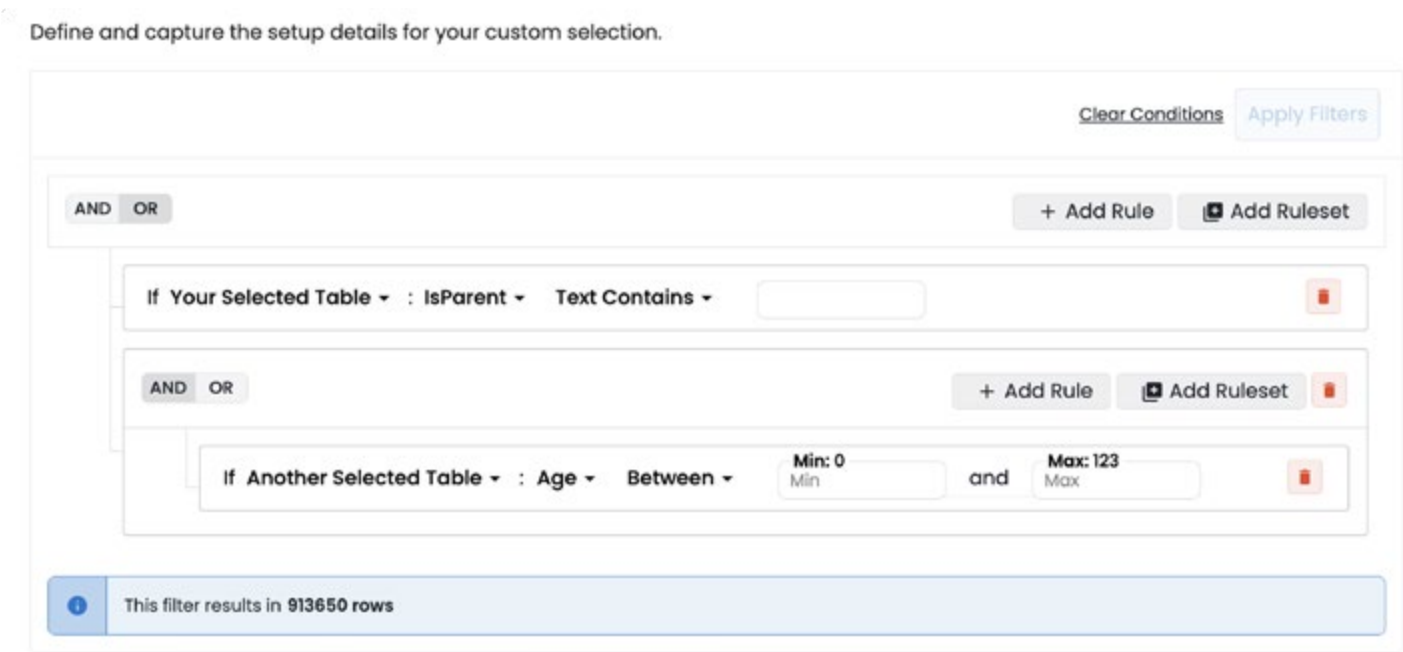
The screenshot displays the Selection Builder interface. At the top right, there are two buttons: "Clear Conditions" and "Apply Filters". Below these, there are two tabs: "AND" and "OR". To the right of the tabs are two buttons: "+ Add Rule" and "+ Add Ruleset". The main area shows a filter rule: "If Your Selected Table : Age Between Min: 0 and Max: 123". The "Min" field is set to 0 and the "Max" field is set to 123. There is a red square icon to the right of the "Max" field. At the bottom, a blue bar indicates "This filter results in 913650 rows".

Advanced Filtering Logic

Mix and match conditions using:

- AND / OR operators
- Nested condition groups for layered logic

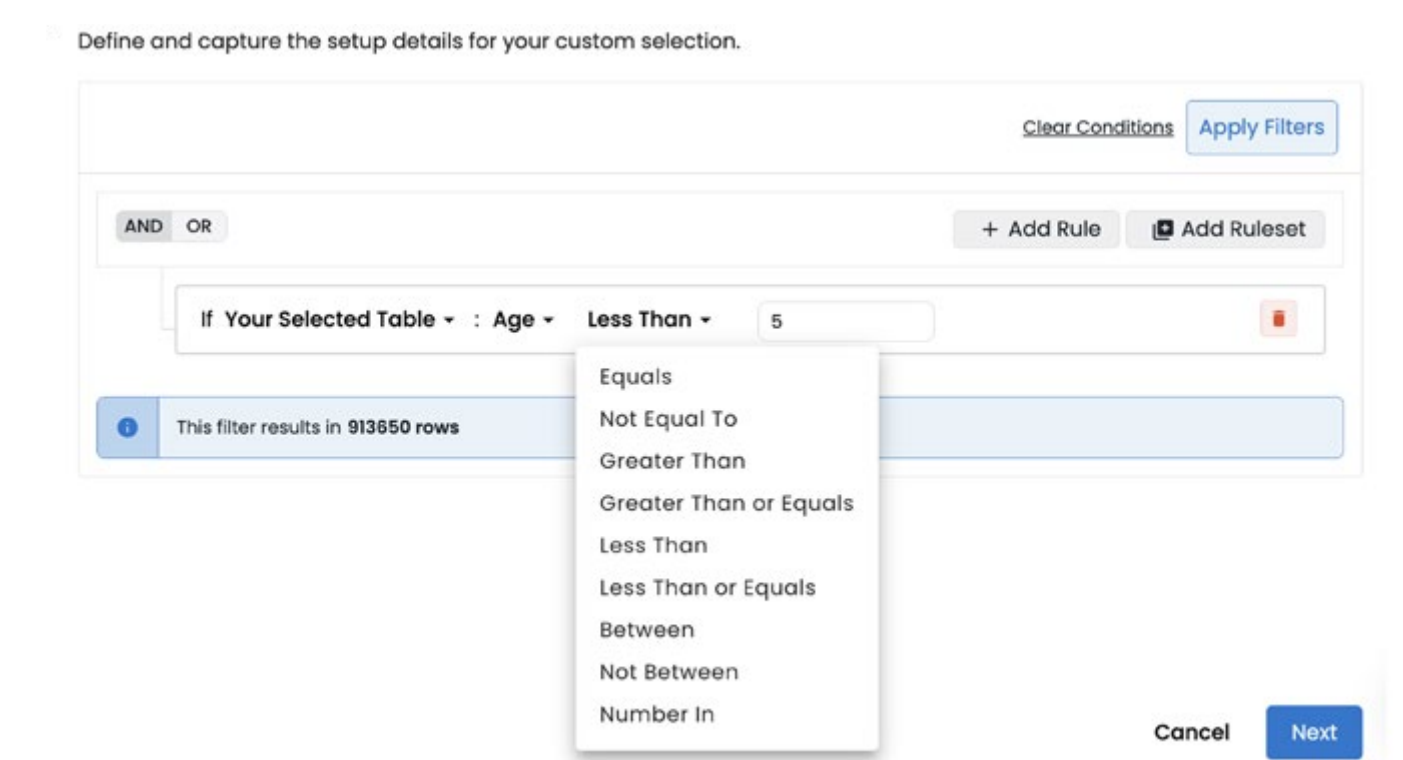
Whether you're narrowing down or broadening your target group, you've got full control.



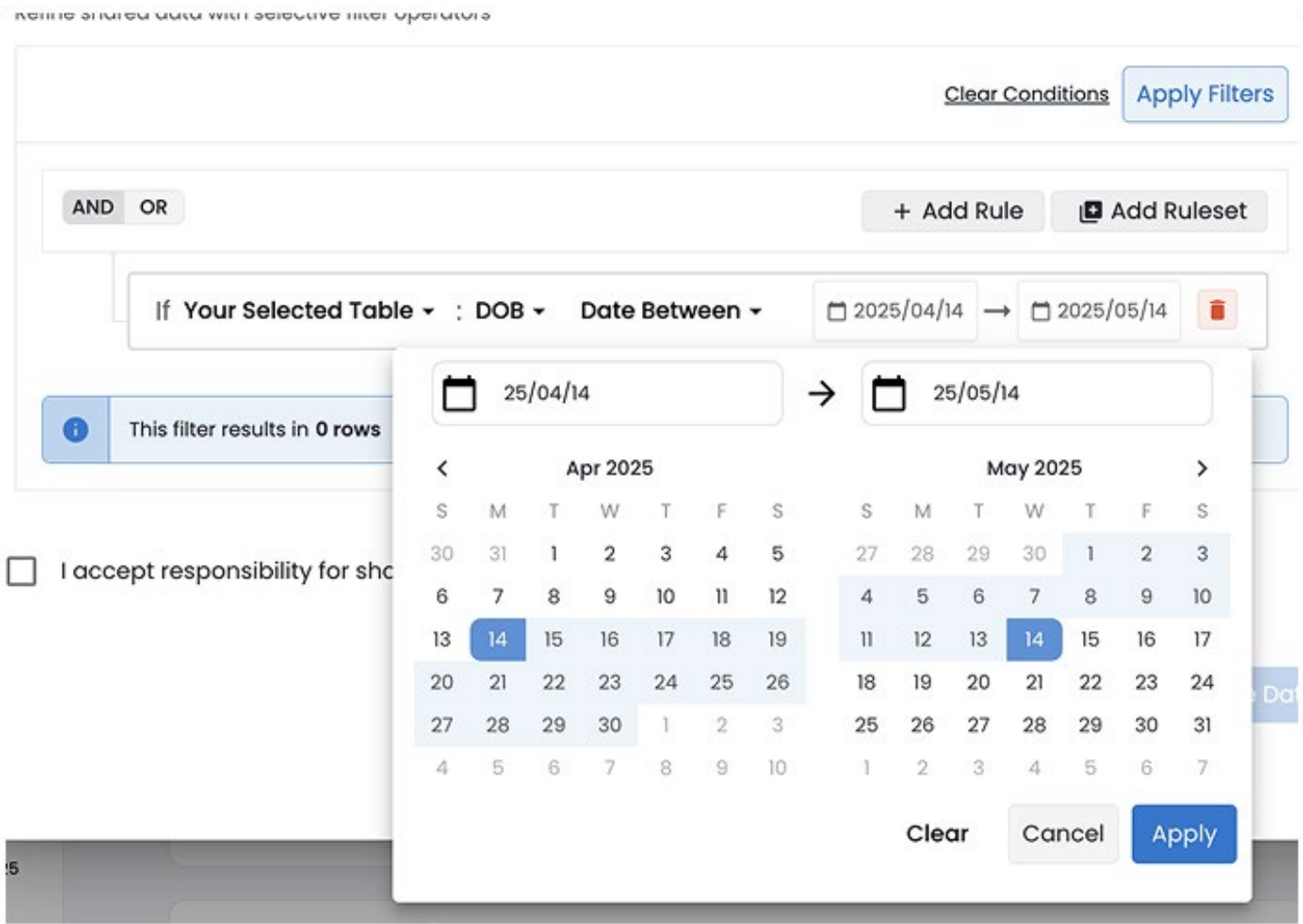
Powerful Filtering Tools

You can now filter by:

- **Text or numeric fields:** Multi-select drop-downs
- **Numbers:** Equals, Greater Than, Between (min/max range)



- **Dates:** Select a single date or a range (Between two dates)



Unlimited Table Selection

No more limits! Build selections from as many tables as you need – perfect for in-depth insights.

Faster Loading & Smoother Interaction

We’ve optimized loading times to make the selection experience faster, smoother, and easier to follow.

Try It Out

We’re always improving and evolving the platform. This is just the beginning for the Selection Builder. Keep an eye out for even more functionality soon!

Ready to build your next audience? Jump into your project and test drive the new Selection Builder today.

Viewing Matching Fields in Partner Datasets

The Matching Fields widget on the Partner Datasets screen allows users to view the specific PII columns (DW PII Fields) shared in datasets.

To improve data matching and user clarity, Omnisient has introduced a new enhancement to the Partner Datasets screen. This feature gives users visibility into the specific Personally Identifiable Information (PII) fields that are available in shared datasets. Understanding which fields are

available for matching makes the overlap and data collaboration process significantly easier and more transparent.

Quick Summary

- A **View Match Columns** widget is now available on the Partner Datasets screen.
- Users can now view specific PII fields (DW PII Columns) for data matching.
- Helps improve transparency, collaboration, and match accuracy in Overlap Projects.

Introduction

This enhancement is designed for data users and analysts working with shared datasets in Omnisient's web app. When receiving data from partners, users often need to match records based on PII. However, without visibility into what PII fields are included, matching is difficult and error-prone.

With the new **View Match Columns widget**, users can easily identify what fields are available for matching, streamlining the setup of projects such as Overlap or ACE Reports.

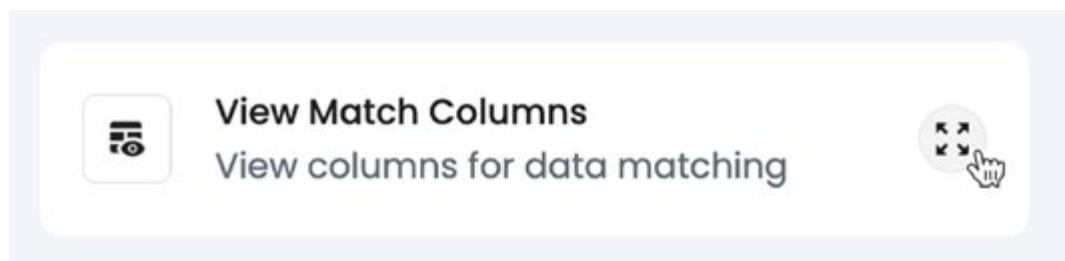
How to View Matching Fields

Navigate to Partner Datasets

- Select **Partner Datasets** from the side menu.

Locate the Dataset

- Find the dataset you want to examine.
- Look for the **View Match Columns** widget associated with that dataset.



Open the Match Columns Widget

Click the widget displayed in the right page column.

- A bottom sheet will open showing the available **DW PII Columns** used for matching.



- The bottom sheet includes fields such as:
 - DW_ID_Key
 - DW_FNAME_Key
 - DW_SNAME_Key
 - Any other configured DW PII columns

Troubleshooting

No Matching Fields Displayed?

- Confirm the dataset includes DW PII fields.
- Check with your partner if fields were properly shared and categorized.

Conclusion

The **View Match Columns** widget significantly improves dataset usability and transparency, enabling users to make informed decisions when matching data with partners. By surfacing DW PII columns clearly, Omnisient empowers users to confidently and securely collaborate with data – without compromising on privacy or efficiency.

Meta Ad Activation: Share Your Audiences with Ease

Set up and share audiences to your Meta Ad Account.

We're excited to introduce Meta Ad Activations! While this feature is currently under review and not fully available yet, we've made it easy for you to still get started. In the meantime, you can still set up your audiences and share them to your Meta Ad Account.

Here's how you can do it.

Quick Summary

- **Set up your Meta ad audience** while we wait for full ad activation approval.
- **Create a selection and mark it for activation**, then go through an internal selection approval process.
- **Share it to your Meta Ad Account** by entering the Ad Account ID and choosing how your audience will be matched.

What You'll Need

The Meta Ad Account ID where you want to send the audience.

Note: Ensure you've uploaded your data via Desktop or Server Connect and selected 'Yes' when prompted to use the dataset for campaign activation – this works with both hashed and unhashed data.

Step 1: Create a Selection for Activation

Go to your Projects section and pick the project where you want to build your audience selection for Meta Ads.

Only certain **Project Types** support audience selections, so make sure your project is compatible. The compatible projects include the following:

- Overlap
- ACE
- Collaborative ACE
- Rainmaker

Create your selection by defining your target audience using available datasets and filters.

Make sure you toggle on the **“Use for Activation”** toggle

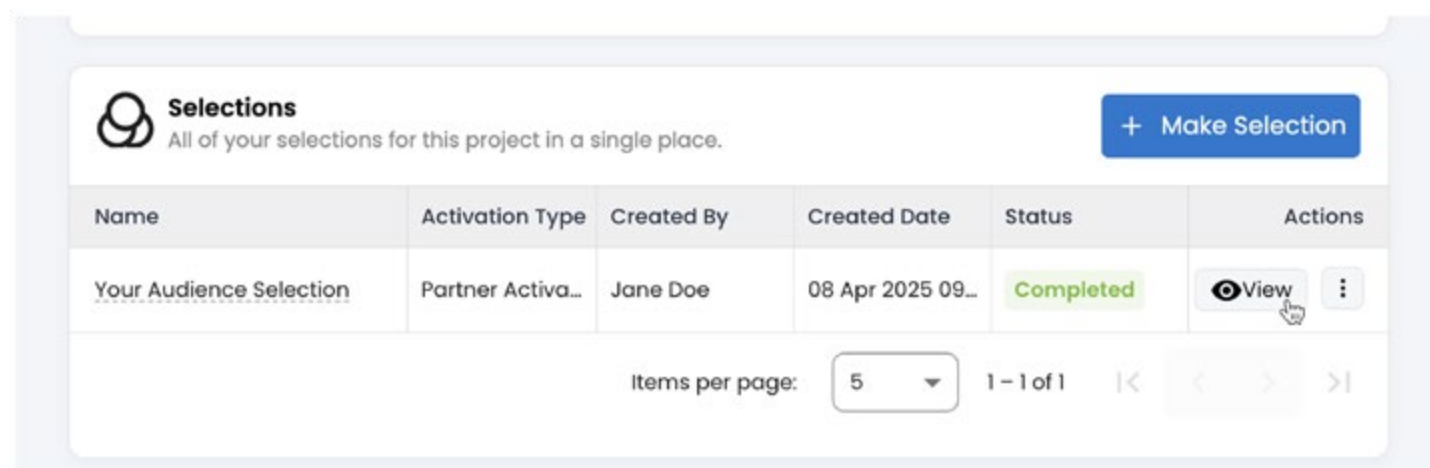
- This setting is supported for:
 - **Save for own use**
 - **Partner Selection**

Your selection will go through an **internal approval process**.

Once it’s approved, you can view the detailed selection under the **Selections** tab in your project dashboard.

Step 2: Share to Your Ad Account

After approval, open the selection to access its detailed view.



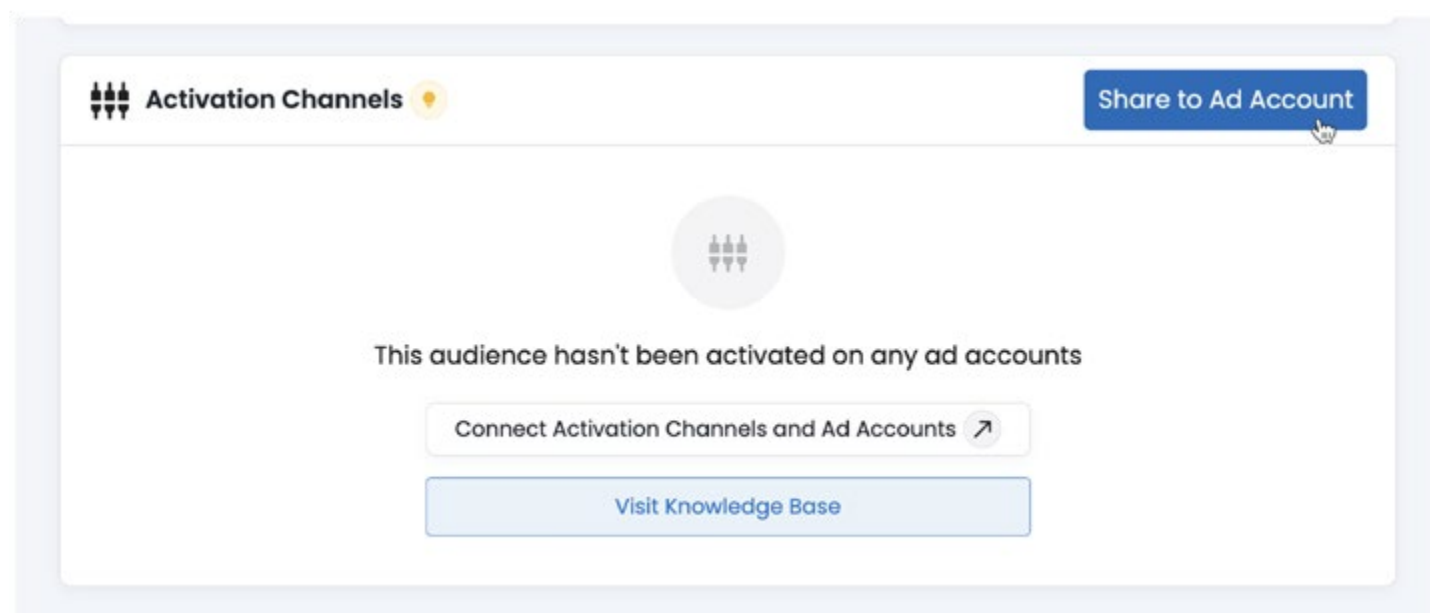
Selections
All of your selections for this project in a single place.

[+ Make Selection](#)

Name	Activation Type	Created By	Created Date	Status	Actions
Your Audience Selection	Partner Activa...	Jane Doe	08 Apr 2025 09...	Completed	View ⋮


Items per page: 5 1 – 1 of 1 [|<](#) [<](#) [>](#) [>|](#)

Scroll to the section titled **Activation Channels**.



Activation Channels

[Share to Ad Account](#)



This audience hasn't been activated on any ad accounts

[Connect Activation Channels and Ad Accounts](#)

[Visit Knowledge Base](#)

Click “Share to Ad Account” A bottom sheet will appear.

Select “**Add Ad Account**” A setup modal will pop up.

Share to Ad Account

Select Ad Account
Select your Ad Account for audience upload.

☒ Enter Meta Account ID ☐ Select from linked Ad Accounts

Ad Account ID

E.g 456000564 0/100

Name your audience for this Ad Account

Friendly name 0/100

Match Fields

Select which fields to match on

Close Add

You’ll see two options:

- **Enter Meta Account ID** – Choose this to type in your Ad Account ID manually.
- **Select from linked Ad Accounts (Coming soon!)** – This option will be available soon once verification is complete.

Assign a Friendly Name – This helps you keep track of multiple activations, especially if you’re managing several campaigns or projects.

Select Matching Fields – Choose the data points Meta will use to match your audience.

Available fields include:

- Email
- Mobile Advertising ID (MAID)
- Phone Number
- First Name
- Last Name

Final Step: Internal Approval

Once you’ve completed the setup, your audience will be sent to the internal Omnisient team to be shared with the Ad Account ID you provided.

All that's left is for them to give the final approval – and you're good to go!

Conclusion: Quick and Ready to Use

While we wait for the full Meta Ad Activations to go live, we can still keep you moving. With just your Ad Account ID and a few clicks, you can define, approve, and share your audiences directly. The steps are simple, and everything is designed to fit naturally into your existing workflow.

So go ahead – start building and activating!

Audience Performance Metrics

Audience performance metrics provide insights into how effectively content and campaigns reach and engage with an audience.

Understanding advertising performance metrics is key to optimizing campaigns and ensuring they deliver results. These metrics help marketers and advertisers evaluate where their budget is going, how their ads are being seen, and how effectively they're engaging their target audience.

Quick Summary

- Performance metrics help track your campaign status, how much you're spending, and how effectively your ads are engaging your audience.
- Key metrics include CTR, CPC, Reach, Impressions, and Amount Spent.
- Knowing how each metric works helps you optimize campaigns effectively.

Delivery

The Delivery column shows the current operational status of your campaign, ad set, or ad. Delivery status helps you understand if your ad campaign is running normally or if there are any issues that require your attention.

Status

Active

The campaign, ad set or ad is running normally.

Pending

The campaign, ad set or ad is not running yet. It may be under review or scheduled to start later.

Inactive

The campaign, ad set or ad is not running due to completion, manual pause, or a dependency being turned off.

Budget

Budget represents the maximum amount you're willing to spend on an ad set or campaign, either on a daily basis or over its lifetime. This value is set outside of the Omnisient platform, typically within the ad platform you're using (e.g. Meta).

Use Case

Helps control total ad spend. Essential for planning and pacing ad delivery.

Amount Spent

Amount Spent reflects the approximate total amount spent on a campaign, ad set, or individual ad within a specified time period. It serves as the numerator in calculations for cost-per-action and cost-per-result metrics. If ads are still actively running, the amount may be estimated, as it can take up to 48 hours for all ad results to be fully processed and reported.

Impressions

The number of times your ad was shown on screen.

Use Case

Measures exposure. This is a standard industry metric used to evaluate visibility and reach.

An impression is recorded each time an instance of an ad appears on screen for the first time. For example, if a user sees an ad, scrolls past it, and then scrolls back to view the same ad again within the same session, it is counted as a single impression. However, if the ad appears on screen for the same user at two different times during the day, it is counted as two separate impressions.

CPM

CPM (Cost per 1,000 Impressions) tells you the average cost of 1,000 ad impressions. CPM is commonly used for comparing cost-efficiency across campaigns or publishers.

How it's calculated

$$\text{CPM} = (\text{Amount Spent} \div \text{Impressions}) \times 1,000$$

Example: If you spend \$50 for 10,000 impressions, your CPM is \$5.

Reach

Reach represents the number of unique users who saw your ad at least once. It shows how many individual people were exposed to your message and is commonly used alongside metrics like frequency and impressions to evaluate audience saturation.

Unlike impressions, which may count multiple views from the same person, reach focuses on unique exposures. This metric is typically estimated using sampled data.

Sampling is a commonly used method in data analysis that involves evaluating a subset of the total data rather than the entire dataset. This approach allows for efficient estimation while maintaining reasonable accuracy. In contrast, certain metrics like impressions or link clicks are calculated using complete data sets and are not based on samples.

Link Clicks

The number of clicks on ad links that direct users to destinations specified by the advertiser.

Use Case

Link clicks are a key indicator of audience interest. Used to evaluate how effectively an ad encourages interaction.

CTR

CTR (click-through rate) measures the proportion of impressions that resulted in link clicks, providing insight into how effectively an ad drives traffic to a specified destination. It is a widely used metric in digital advertising to assess the performance of ads in generating user engagement and website

visits.

CPC

CPC (Cost Per Link Click) represents the average amount spent for each link click. It is commonly used in the online advertising industry to benchmark the cost-efficiency and overall performance of ad campaigns.

How it's calculated

$CPC = \text{Amount Spent} \div \text{Link Clicks}$

Example: \$100 spent for 400 clicks gives a CPC of \$0.25.

Conclusion

These performance metrics provide critical insights into how your advertising campaigns are performing. Whether you're optimizing for reach, engagement, or conversions, understanding how each metric is used and calculated helps you make informed decisions.

Assigning User Permissions During Project Creation

Assign user permissions during the first step of the Project Creation Wizard

Introducing a smarter, faster way to manage access on your projects right from the start! With this new enhancement, you can now add and assign user permissions during the first step of the Project Creation Wizard. This ensures every stakeholder is correctly added before the project goes live – minimizing delays, eliminating forgotten permissions, and improving overall collaboration.

Quick Summary

- Add users and assign roles in the first step of project creation
- Search and select users by name or email
- Default permission is Read Only – with easy dropdown editing
- Reduce access errors and streamline collaboration from day one

Who Is This For?

This feature is ideal for all users creating new projects on the Omnisient platform – especially those managing teams or projects that require input from multiple collaborators within the same organization.

How It Works: Step-by-Step

1. Start a New Project

Begin by clicking Create New Project and selecting your project template.

2. Add Additional Users

In the first step of the wizard, you'll now see a section labeled "User Access and Permissions".

- Use the search bar to find users by name or email address.
- Only users from your organization are shown.
- Users already added to the project won't appear again in the search.

User Access and Permissions

Add more users to your project

Add Additional Users

Search by name or email...

Users

John Doe
john@company.com

Owner



3. View and Manage the User List

Once selected, users appear under the “Users” section with their name and email.

- You, the project creator, will automatically be listed as Owner.
- Your role and the delete option will be disabled (since you can’t remove yourself).
- All added users are given Read Only permission by default.

User Access and Permissions

Add more users to your project

Add Additional Users

Search by name or email...

Users

John Doe
john@company.com

Owner



Sam Smith
sam@company.com

Read-only



4. Assign Roles

Next to each user’s name, a dropdown allows you to assign their role:

- Owner
- Read and Write
- Read Only

Owner	Read and Write	Read Only
Full control: can manage users, edit all content, delete the project, and update permissions.	Can view and edit the project, manage data and reports, and perform selections.	View-only access to the project, data, and reports – no editing capabilities.

To remove a user before completing project setup, simply click the delete icon.

Best Practices

- Set permissions based on responsibilities: Only assign Owner permissions to those who truly need full control.
- Keep access lean: Avoid over-permissioning – more is not always better.
- Review before publishing: Take a moment to confirm all necessary users and roles are in place.

Try It Out

Ready to streamline your next project? Jump into the Create New Project flow and experience the smarter way to assign user roles from the get-go!

Adding South African Company Registration Number as a PII Field

Newly added South African Company Registration Number field as a Personally Identifiable Information (PII) type

Introduction

This article explains how to use the newly added South African Company Registration Number field as a Personally Identifiable Information (PII) type on the Omnisient platform.

This enhancement improves local compliance and enables better dataset configuration for South African businesses.

Target audience: Data uploaders, administrators, and data privacy officers operating under South African regulatory frameworks.

Overview of the New PII Field

Omnisient now supports South African Company Registration Number as a recognized PII field. This field accommodates both legacy and modern formats and is available in both Desktop Connect and Server Connect applications.

Field Availability by Region

This PII type is only visible to tenants registered in South Africa.

If your account is not registered in the South African region, the field will not appear during the mapping or transformation steps.

Supported Formats for Validation

The platform automatically validates two formats for South African company registration numbers:

Format Type	Structure	Example
Post	YYYY/NNNNNN/XX	2021/123456/07
Pre-2002	KYYYY/NNNNNN	K1999/654321

If a record does not conform to either format, it will be flagged during the transformation step for further review.

Using the New PII Type in Upload Apps

Desktop Connect

Step 2 – Select PII Fields: The system’s machine learning engine will suggest this field if the format is detected.

Step 3 – Map Fields: Choose SA Company Registration Number from the Omnisient Category dropdown.

Continue with the transformation and upload steps as usual.

Server Connect

During schema configuration via the Configurator, import fields from your source file or database.

Mark the registration number column as a PII field.

Assign the SA Company Registration Number category.

Save your configuration and schedule or run the upload.

Validation and tokenization will be performed automatically in both tools, with compliance and security ensured.

Tips and Best Practices

Always double-check format compliance before upload to avoid validation errors.

Limit exposure by only including registration numbers when necessary for matching or enrichment.

Understanding the Available Dataset Detail View

A centralized snapshot of your dataset’s collaboration status, metadata, project references, and key actions.

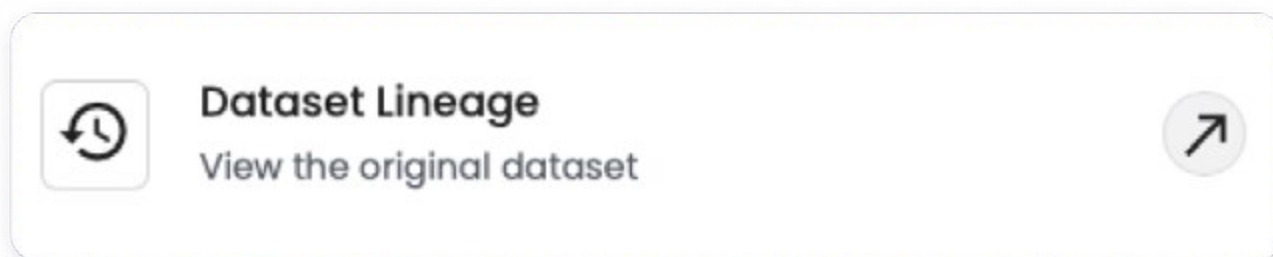
The Available Dataset Detail View provides a centralized snapshot of your dataset’s collaboration status, metadata, project references, and key actions. To make your data experience more powerful and transparent, we’ve introduced a new widget designed to help you seamlessly navigate dataset history.

Quick Summary

- A Dataset Lineage widget has been added to the “Available Datasets” view.
- Click the widget to navigate to the original dataset view.

Dataset Lineage Widget

You can now access additional detail about your dataset’s origin through the Dataset Lineage widget – available directly in the Available Dataset view.



What does it do?

The Dataset Lineage widget allows you to view the original source dataset that your currently available dataset was registered from. This is especially useful when you want to:

- Review original PII fields classifications
- Investigate data quality reports
- View dataset history
- Understand the data before registration or downstream processes

Simply click the arrow icon in the widget, and you'll be taken to the original dataset's detail page.

The original dataset view contains details such as PII fields classifications, data quality reports, and the ability to view dataset history that are not part of the Available Dataset summary.

What Changed?

To keep the interface clean and relevant, we've removed the PII Fields & Categories widget from the Available Dataset view. All field-level detail and error diagnostics are now accessible through the Dataset Lineage redirection.

Try it Out

Jump into the Available Dataset view to explore the new Dataset Lineage widget. With just one click, you can access the original dataset and view details like PII fields classifications, data quality reports, and dataset history – all just a step away.

Managing Settings on the Omnisient Platform

This article explains how to view and update your organizational and personal settings in the Omnisient web application.

Quick Summary

- Access Settings from the top navigation bar.
- Update organization details from General Organization Settings.
- Use the Profile section to update your personal details.
- Change your password in the User Security section.
- Contact Support to update locked fields.



Navigating to Settings

You can access Settings from the top navigation bar. In the Settings area, use the left-side menu to move between:

- Organization
 - ◊ General
- User Settings
 - ◊ Profile
 - ◊ Security

Breadcrumbs at the top of the page (e.g., Settings > General Organization Settings) help you keep track of where you are.



Organization Settings





Jane Doe
Omnisient 1


Omnisient Platform

V. 1.1.1.11111


 Settings 2


 Policies


 Service Status


 Contact Support


Engage & Learn

 See What's New

 Give Feedback

 Request a Feature

 Report a Problem

 Learning Academy

Logout

Switch Company >

General Organization Settings

Organization Display Name: This field is visible to all users but is editable only by organization admins. If you're not an admin, the field will appear disabled.

Industry: This field is always read-only for all users. However, if you wish to edit this for your organization, please contact support for assistance.

User Settings

Profile

The Profile section allows you to manage your individual user information. Here you can view or update your personal details:

First Name and Last Name: Editable fields you can update at any time.

Mobile Number: Optional, but editable for your convenience.

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Default Company: If you're assigned to more than one company, you'll see a dropdown to select your default. This option is hidden for single-company users.

Email Address: This field is always read-only for all users. However, if you wish to edit this aspect of your organization, please contact support for assistance.

User Security Settings

This section allows you to update your password.

You'll be asked to:

- Your current password
- A new password that meets platform security rules
- Confirm the new password

Changing your password regularly makes your account safer.

Try It Out

Explore the Settings section to make sure your details are accurate and up to date. Whether you're customizing your profile or reviewing organizational info, everything is just a few clicks away.

Export Power BI Reports as PDF, PNG, or PPT

We've introduced a powerful export feature for Power BI reports in the Omnisient platform.

We've introduced a powerful export feature for Power BI reports in the Omnisient platform. This guide explains how to export reports in PDF, PNG, or PPT formats, either as individual pages or as a full report.

Target Audience

This feature is available to all users who have access to view reports on the platform.

How to Export a Power BI Report

Step-by-step Instructions

- Open a Power BI Report
 - ◊ Navigate to the report you want to export.
- Click either the Export Full Report Button or Export Page Button
- Locate the Export button, now visible at the top of your report view.
 - ◊ Choose File Format
 - ◊ Select your preferred file format from the dropdown:
 - * PDF
 - * PNG
 - * PPT
- You'll see a confirmation message once your export is queued.
- Receive Your Report via Email
 - ◊ You'll receive an email with a download link once your report is ready.

Tips and Best Practices

For quicker downloads, export individual pages instead of full reports.

Troubleshooting

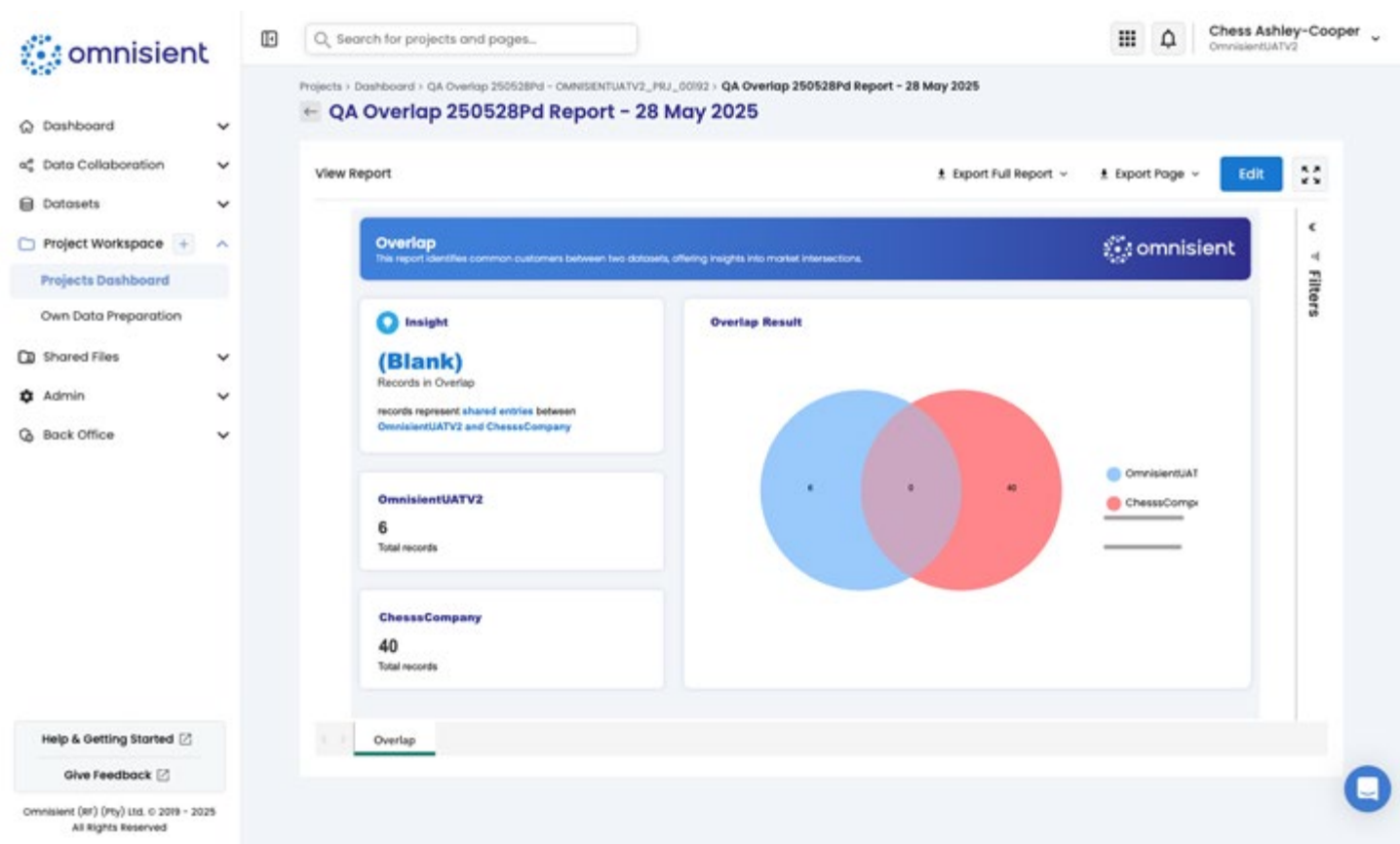
Didn't receive an email?

Check your spam or junk folder. If it's not there, try exporting again or contact support.

Button not visible?

Ensure you have the correct report access permissions. If issues persist, reach out to your administrator or support support@omnisient.com.

If you have further questions, contact support@omnisient.com or use the Help button in the web app.



Selections: Build, Save, and Export Audiences with Ease

Your new way to define, save, and export customer selections is here.

We've updated how audience selections work across the platform to give you more control, flexibility, and transparency - with better options for saving and exporting, plus a more intuitive setup experience.

- Build audience selections from your own data.
- Choose how you want to use the selection - Save, Export, or Activate.
- Exports and Activations require Omnisient Approval.
- You can find your saved selections inside your project.

What You'll Need

To create a selection, make sure you have:

- Your data has been added to a project that supports selections.
- During upload, you selected "Use Dataset for Campaign Activation" if you plan to activate audiences via Meta or other supported channels.

Step 1: Choose Who You're Targeting and How

When starting a selection, begin by selecting the customer base you want to target and what you plan to do with it. Both of these fields must be populated before continuing.

Customer Base

Choose which customer base you want to target:

Currently, only Own Customer (your organization's customer data) is supported for activations.

Intended Use

Select how you plan to use the audience:

- Activate via Supported Channels (Meta)
 - ◊ Prepare this audience to be shared directly with a supported ad platform, such as Meta. After approval from Omnisient, we'll activate the audience by pushing it to the ad account you specify.
- Export Overlapped Customers as a CSV
 - ◊ Download a list of the customers who match your selection filters. You'll choose what columns to include and how large the target and control groups should be.
- Save Criteria Only
 - ◊ Save the audience definition – filters and inputs – without activating or exporting.

If your dataset wasn't marked for campaign activation during upload, the activation option won't be available.

About the Selection Builder

Once you've populated the customer base and intended use field, the Selection Builder will open.

This is where you define your filters and logic to shape your audience.

You can:

- Apply advanced filters
- Combine multiple conditions
- Preview the matched customer count

Need help using the builder?

Check out our Selection Builder Guide for a full walkthrough on using filters, logic, and field options.

Step 2: Define and Configure Your Audience

Now that you've selected who to target and how you'll use the audience, it's time to define it.

Start by giving your selection a clear and descriptive name to help you (and your team) find it later in the dashboard.

What happens next depends on the Intended Use you selected:

If you chose Save Criteria Only

You're almost done! Just name your selection and hit Create – your criteria will be saved immediately, no extra steps required.

This is perfect if you're still refining your approach or want to reuse the setup later.

If you chose Export Overlapped Customers as a CSV

You'll define your Target and optionally a Control group, then choose which data columns to include in the export.

All columns from your own dataset are included by default. If you're working in a collaborative project, only shared columns from the other party will be selectable.

You can also choose to save this output as a new table in your project for future use.

If you chose Activate via Supported Channels

You'll configure the Target size for the audience you plan to activate.

After saving, the selection goes to Omnisient for review before it can be shared with your Meta Ad Account.

Want to learn more about Meta Activation?

- [Get Your Data Ready for Meta Ad Account Activations](#)
- [Meta Ad Activation: Share Your Audiences with Ease](#)
- [Audience Activation Status](#)

What Happens Next

Intended Use	What Happens After Saving
Save Criteria Only	Your selection is saved immediately. No review required.
Export as CSV	Sent to Omnisient for review. Once approved, export is available.
Activate via Meta	Sent to Omnisient for approval. Once approved, you can complete the next steps for activation.

You'll be able to view your saved selections in the Selections tab of your project. For any selections that require review, the status will show as Awaiting Approval until Omnisient approves the request.

Viewing Dataset Share and Expiry Dates for Locked Projects

Quickly identify expired datasets within locked projects.

When working with shared datasets in the Omnisient platform, project access may become locked due to dataset expiration. Identifying which dataset has expired can be challenging, especially when multiple datasets are involved. This article explains how the platform helps you quickly identify expired datasets within locked projects.

Enhancing Visibility in Locked Projects

To help users manage and troubleshoot locked projects more efficiently, the Omnisient platform now includes both the dataset share date and expiry date directly on the locked project screen.

Key Enhancements

- **Dataset Share Date:** View when each dataset was originally shared with the project.
- **Dataset Expiry Date:** Instantly identify when a dataset's access expired, leading to the locked project status.

These details eliminate guesswork and reduce delays in reactivating collaborative work.

How to View Dataset Expiry Information

- Navigate to the Locked Project:
 - ◊ Go to the Projects section from the dashboard.
 - ◊ Select the project that appears with a "Locked" status.
- Review Dataset Details:
 - ◊ On the locked project screen, locate the table listing all datasets used in the project.
 - ◊ Each dataset row now includes:
 - * Dataset Share Date
 - * Dataset Expiry Date
- Identify Expired Dataset(s):
 - ◊ Compare current date with expiry dates to quickly determine which dataset caused the project to lock.

Tips and Best Practices

Renew Early: Set calendar reminders based on expiry dates to avoid unexpected project lockouts.

Collaborate Promptly: Contact dataset owners for renewal or re-sharing as soon as an expiration is noted.

Audit Regularly: Periodically review project datasets for upcoming expirations to maintain project continuity.

Troubleshooting

Missing Dates: If share or expiry dates are not visible, refresh the page or ensure your user role has permission to view dataset metadata.

Locked Project Access: If you're unable to view any details, contact your company's admin or Omnisient support at support@omnisient.com.

Conclusion

Adding share and expiry dates to the locked project screen empowers users to quickly identify and resolve project lockouts due to dataset expiration. This improvement supports better project oversight and collaboration continuity on the Omnisient platform.

Predictive Modelling on Retail Data (USA Only)

This article introduces the Predictive Modelling on Retail Data project available exclusively to organizations operating within the USA

Introduction

This article introduces the Predictive Modelling on Retail Data project available exclusively to organizations operating within the USA. Designed with a focus on financial inclusion, this project utilizes advanced matching techniques and collaborative datasets to provide deep insights into the behavior of consumers in underserved communities.

This project is particularly relevant for financial institutions, insurers, and retail-focused analytics teams looking to expand their services or understand new customer segments in the U.S. retail landscape.

Prerequisites

Geographic Availability: This project is only available in the USA.

Subscription Requirement: Requires an active Predictive Modelling on Retail Data subscription to access relevant data.

User Role: Ensure you have the necessary permissions to create and access Projects and Shared Datasets.

Project Objective

The goal of this project is to help organizations:

- Understand and analyze underserved communities.
- Identify financial behavior patterns and customer needs.
- Improve access to financial services and offer tailored solutions.
- Assess creditworthiness, spending trends, and potential market reach.

How It Works

1. Data Sources

The project combines anonymized datasets from:

- Retail Data (retail purchase behavior)
- A participating financial institution (transaction and financial behavior)

These datasets do not include Personally Identifiable Information (PII) and are processed in compliance with privacy regulations.

2. Matching Mechanism

- Matching Fields: Records are joined using a common Profile_ID and Retro Date.
- The platform uses Secure Multi-Party Computation (SMPC) to facilitate data collaboration while maintaining strict privacy standards.

3. Insights Delivered

The matched data is analyzed to generate insights on:

- Spending patterns
- Customer financial behavior
- Creditworthiness indicators
- Community profiling and segmentation

These insights help businesses identify opportunities for growth, assess risk, and better tailor services for financially underserved populations.

Steps to Get Started

- Ensure you have access to both your organization's anonymized financial dataset and the Retail Data dataset (subscription required).
- Navigate to the Omnisient Web App and go to the Projects section.
- Select "Create New Project" and choose the Predictive Modelling on Retail Data template.
- Configure matching fields:
 - ◊ Set Profile_ID as the common customer identifier.
 - ◊ Define Retro Date as the historical reference point.
- Submit the project for processing.
- Review reports and tables generated once the project is processed.

Tips and Best Practices

- Ensure high data quality in your financial dataset to improve match rates.
- Use SQLPad or Jupyter Notebook to clean and transform your datasets before matching.
- Regularly review and update your datasets for better trend analysis.

Troubleshooting

- Low match rate: Check the consistency of Profile_ID and Retro Date across both datasets.
- Access errors: Verify that your project and dataset permissions are correctly set.
- Subscription issue: Confirm that your Predictive Modelling on Retail Data subscription is active and associated with your tenant account.

Need Help?

Reach out to our support team via the Intercom chat on the platform or email support@omnisient.com for assistance with setup or troubleshooting.

Selections: Build, Save, and Export Audiences with Ease

Your new way to define, save, and export customer selections is here.

We've updated how audience selections work across the platform to give you more control, flexibility, and transparency – with better options for saving and exporting, plus a more intuitive setup experience.

- **Build audience selections from your own data.**
- **Choose how you want to use the selection – Save, Export, or Activate.**
- **Exports and Activations require Omnisient Approval.**
- **You can find your saved selections inside your project.**

What You'll Need

To create a selection, make sure you have:

- Your data has been added to a project that supports selections.
- During upload, you selected "Use Dataset for Campaign Activation" if you plan to activate audiences via Meta or other supported channels.

Step 1: Choose Who You're Targeting and How

When starting a selection, begin by selecting the customer base you want to target and what you plan to do with it. Both of these fields must be populated before continuing.

Customer Base

Choose which customer base you want to target:

- Currently, only Own Customer (your organization's customer data) is supported for activations.

Intended Use

Select how you plan to use the audience:

- Activate via Supported Channels (Meta)
 - ◊ Prepare this audience to be shared directly with a supported ad platform, such as Meta. After approval from Omnisient, we'll activate the audience by pushing it to the ad account you specify.
- Export Overlapped Customers as a CSV
 - ◊ Download a list of the customers who match your selection filters. You'll choose what columns to include and how large the target and control groups should be.
- Save Criteria Only
 - ◊ Save the audience definition – filters and inputs – without activating or exporting.

If your dataset wasn't marked for campaign activation during upload, the activation option won't be available.

About the Selection Builder

Once you've populated the customer base and intended use field, the Selection Builder will open.

This is where you define your filters and logic to shape your audience.

You can:

- Apply advanced filters
- Combine multiple conditions
- Preview the matched customer count

Need help using the builder?

Check out our **Selection Builder Guide** for a full walkthrough on using filters, logic, and field options.

Step 2: Define and Configure Your Audience

Now that you've selected who to target and how you'll use the audience, it's time to define it.

Start by giving your selection a clear and descriptive name to help you (and your team) find it later in the dashboard.

What happens next depends on the Intended Use you selected:

If you chose Save Criteria Only

You're almost done! Just name your selection and hit Create – your criteria will be saved immediately, no extra steps required.

This is perfect if you're still refining your approach or want to reuse the setup later.

If you chose Export Overlapped Customers as a CSV

You'll define your Target and optionally a Control group, then choose which data columns to include in the export.

All columns from your own dataset are included by default. If you're working in a collaborative project, only shared columns from the other party will be selectable.

You can also choose to save this output as a new table in your project for future use.

If you chose Activate via Supported Channels

You'll configure the Target size for the audience you plan to activate.

After saving, the selection goes to Omnisient for review before it can be shared with your Meta Ad Account.

Want to learn more about Meta Activation?

- **Get Your Data Ready for Meta Ad Account Activations**
- **Meta Ad Activation: Share Your Audiences with Ease**
- **Audience Activation Status**

What Happens Next

Intended Use	What Happens After Saving
Save Criteria Only	Your selection is saved immediately. No review required.
Export as CSV	Sent to Omnisient for review. Once approved, export is available.
Activate via Meta	Sent to Omnisient for approval. Once approved, you can complete the next steps for activation.

You'll be able to view your saved selections in the Selections tab of your project. For any selections that require review, the status will show as Awaiting Approval until Omnisient approves the request.