



# Omnisient Secure Data Exchange User Guide

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# General Information

## Platform Details

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 tokenise and hash (secure) any personal information before leaving the users environment. The Omnisient Web App is used to manage permissions to the tokenised datasets, manage users and view an audit trail of the activity on your company account. The Web App also provide collaboration and analyses functionality including:

1. Running overlap analyses with partner datasets to get quick insights into partnership potential.
2. Carrying out further analytics and gaining insights from partner datasets.
3. 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.

Further modules are currently under development. Please check in with the Omnisient team on details.

**Points of support contact:** [support@omnisient.com](mailto:support@omnisient.com)

## References

Please refer to the following documents for full system details

1. *Omnisient Information Security Policy*
2. *Omnisient Vulnerability Management and Patch Program*
3. *Omnisient Password Policy*
4. *Omnisient Incident Response Plan*
5. *Omnisient Encryption Policy*
6. *Omnisient Business Continuity Plan*
7. *Omnisient Data Protection Policy*
8. *Omnisient Data Classification Policy*

## User Access levels

A company that wishes to use the Omnisient Platform creates an account with Omnisient under one of our licenses. Then users under that company receive individual login credentials to use the platform. These user licenses are all linked to the parent company, and all have default access to datasets and analytic insights as mapped out on the table below. As roles differ from company to company, Admin type users will be allowed to configure permissions to their exact requirements, by modifying the profiles of User type users to restrict them to only the functions that they are concerned with (See section "Edit User Permissions under "Managing your Environment - Admin" further down in this guide.

## User Access Levels

	Admin	User	Freemium
<b>Book Overlap</b>	X	X	
<b>Book</b>	X	X	
<b>View Overlaps</b>	X	X	
<b>Summary</b>	X	X	
<b>View Report</b>	X	X	
<b>Execute Exchange</b>	X		
<b>Delete</b>	X		
<b>Book Data Exchange</b>	X		
<b>Book</b>	X		
<b>View Exchanges</b>	X		
<b>Download</b>	X		
<b>Delete</b>	X		
<b>Audit Trail</b>	X		X
<b>Users</b>	X		
<b>Add</b>	X		
<b>Edit</b>	X		
<b>Delete</b>	X		
<b>Reports</b>	X	X	X
<b>View</b>	X	X	X
<b>Edit</b>	X		
<b>Private Projects</b>	X		
<b>Add</b>	X		
<b>Unlink</b>	X		
<b>API Keys</b>	X		
<b>Add</b>	X		
<b>Delete</b>	X		
<b>ACE Views</b>	X	X	X
<b>View</b>	X	X	X
<b>Edit</b>	X		

### Personal Information Data and Privacy

The desktop onboarding app is used to tokenise and anonymised all personal information (information that uniquely identifies an individual) before any data leaves the user's local environment. Only anonymised, 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.

## Minimum System Requirements

The Web application can be used by visiting the web app URL at <https://app.omnisient.com/> 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 two to five times the size of the raw file size being uploaded

## 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 whitelisted:

- i. [api.omnisient.com](https://api.omnisient.com)
- ii. [app.omnisient.com](https://app.omnisient.com)
- iii. [auth.omnisient.com](https://auth.omnisient.com)
- iv. [omnisientapi.azurewebsites.net](https://omnisientapi.azurewebsites.net)
- v. [omnisientsecurity.azurewebsites.net](https://omnisientsecurity.azurewebsites.net)
- vi. [intersect.blob.core.windows.net](https://intersect.blob.core.windows.net)
- vii. [columnprediction.blob.core.windows.net](https://columnprediction.blob.core.windows.net)
- viii. [static.omnisient.com](https://static.omnisient.com)

## 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.*

## 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.

## Data Preparation Format

1. 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:
  - a. Microsoft / Azure SQL Server;
  - b. MySQL / MariaDB;
  - c. PostgreSQL.
2. For Flat Files:
  - a. Please ensure all rows to have the same number of columns i.e. delimiters;
  - b. Please ensure there are no blank fields in the header row (1<sup>st</sup> row);
  - c. Please ensure the header row does not contain headers with any of the following names: iURN, error;
  - d. Please preview your raw data to make sure everything is in order using notepad or notepad++;
  - e. Files need to be saved as tab or pipe-delimited files.
3. For SQL Tables:
  - a. Please ensure that each table has a number/date field. This is necessary as the rows get loaded in batches.

## Troubleshooting – Common Problematic File Types

1. **File ending with a pipe in pipe-delimited flat files:** E.g., "File ending with a pip.csv". The empty space after the pipe on the top row is picked up as a blank header field by our system.
  - a. Solutions:
    - i. Remove last pipe on all columns;
    - ii. Delete empty last column and re-export data to csv;
    - iii. add "emptyColumn" at the end of the top row (header row); this last column will then be all blank.
2. **Extra delimiters on a line:** E.g., "File With extra Delimiters.csv". The system reads the number of pipes or tabs in the header row (1<sup>st</sup> line) and expects the same number on all other rows. If any row has a different number of pipe delimiters it will throw an error and ask the user if they wish to save all errors to a file to clean the dataset at once.
  - a. Solution:
    - i. The rows with a different number of delimiters must be fixed.
3. **Forbidden header names:** E.g., The following header names are not allowed, "iURN" and "error". If the header contains these the system will ask the user to change the header name.
  - a. Solutions:
    - i. The headers with those names must be changed.

**4. Blank header:** E.g., "blankHeaders.csv" Any blank headers will throw an error.

a. Solutions:

i. Insert a header name where missing.

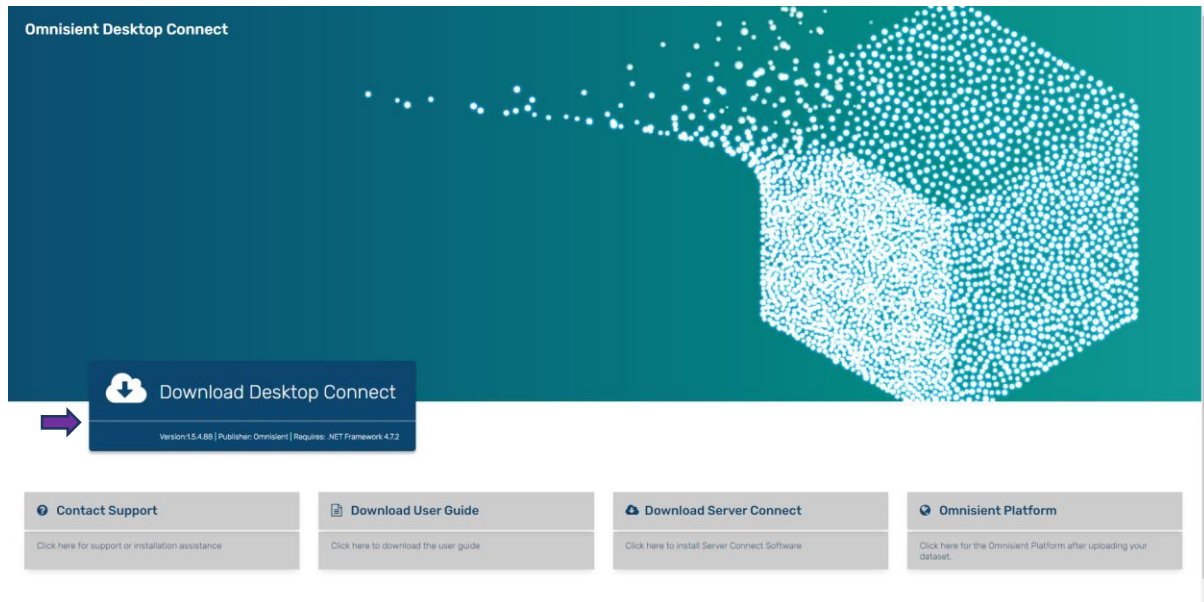
**5. Duplicate header names:** Two columns in the same table with the same name will throw an error.

a. Solutions:

i. Rename one of the column headers so that each column header is unique.

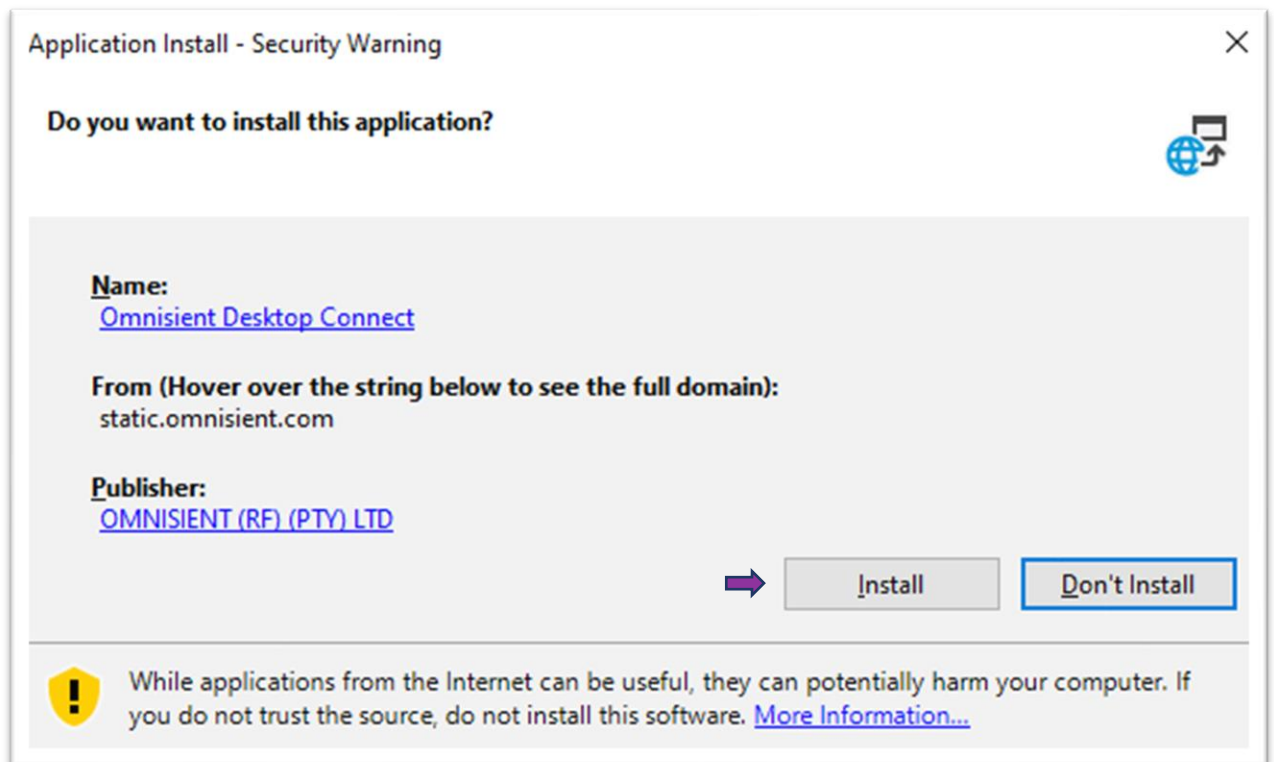
## Desktop Connect Onboarding Application: Installation

Please download the Omnisient Desktop Connect onboarding desktop installer at the following URL: <https://static.omnisient.com/dta/install/index.html>. Please follow the installation wizard through to the end.





Once the Setup.Exe file is downloaded, click on it. (You will find Setup.EXE at the bottom of your screen, or in your Download Folder):

Select Install:



Once the installation is completed the app will auto-launch and you will be presented with the login screen:

 Omnisient Desktop Connect ×

 **OMNISIENT**

---

**DESKTOP CONNECT**  
Version 1.5.4.96

Email

Password

[Forgot Password?](#)  
[Contact Support](#)

Login

Use the credentials sent to you via our welcome email. Search for “Omnisient Welcome” in your email inbox. The Desktop Connect upload screen will follow, and you can proceed through the prompts.

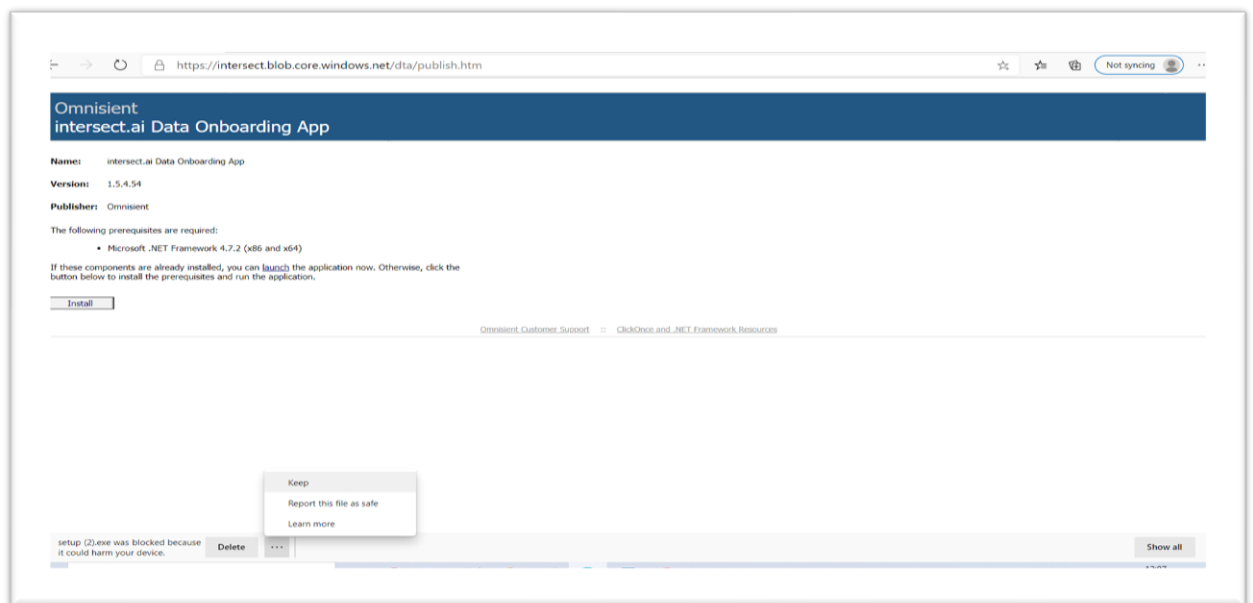


## Desktop Installation Trouble Shooting FAQ

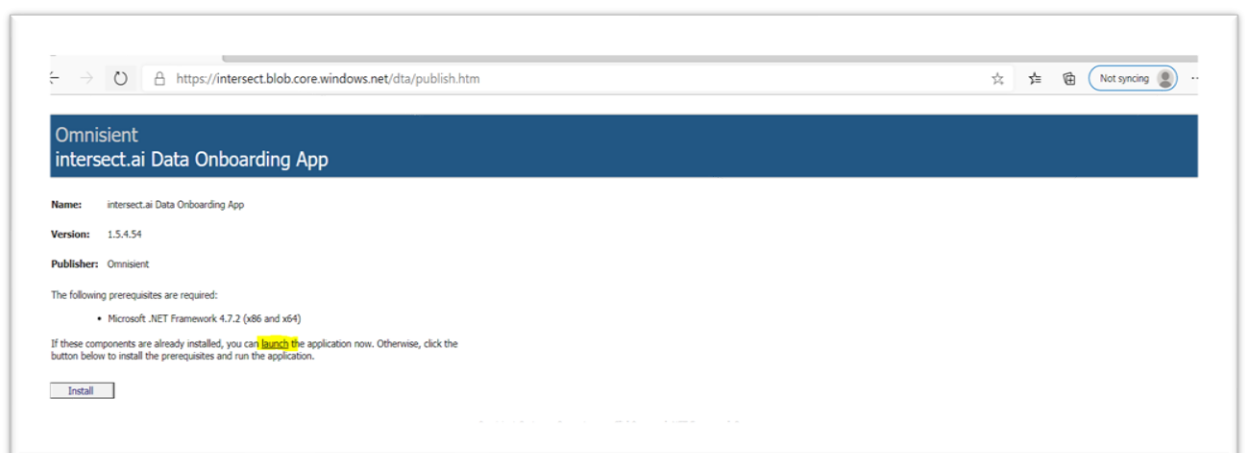
These are some of the possible issues faced during the installation of the Omnisient Desktop Connect onboarding application.

**1. Failure to download or run the install file:** This may be caused by your antivirus or firewall blocking the download.

a. Click “keep” or “save anyway” or “run anyway” as needed.



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



- c. Firewall blocking app install or use: Please contact your IT administrator and have the following URLs whitelisted.
  - i. api.omnisient.com
  - ii. app.omnisient.com
  - iii. auth.omnisient.com
  - iv. omnisientapi.azurewebsites.net
  - v. omnisientsecurity.azurewebsites.net
  - vi. intersect.blob.core.windows.net
  - vii. columnprediction.blob.core.windows.net
  - viii. static.omnisient.com
- d. Contact Omnisient support for an MSI installer & further support.

## Desktop Connect Onboarding Application: Data Upload

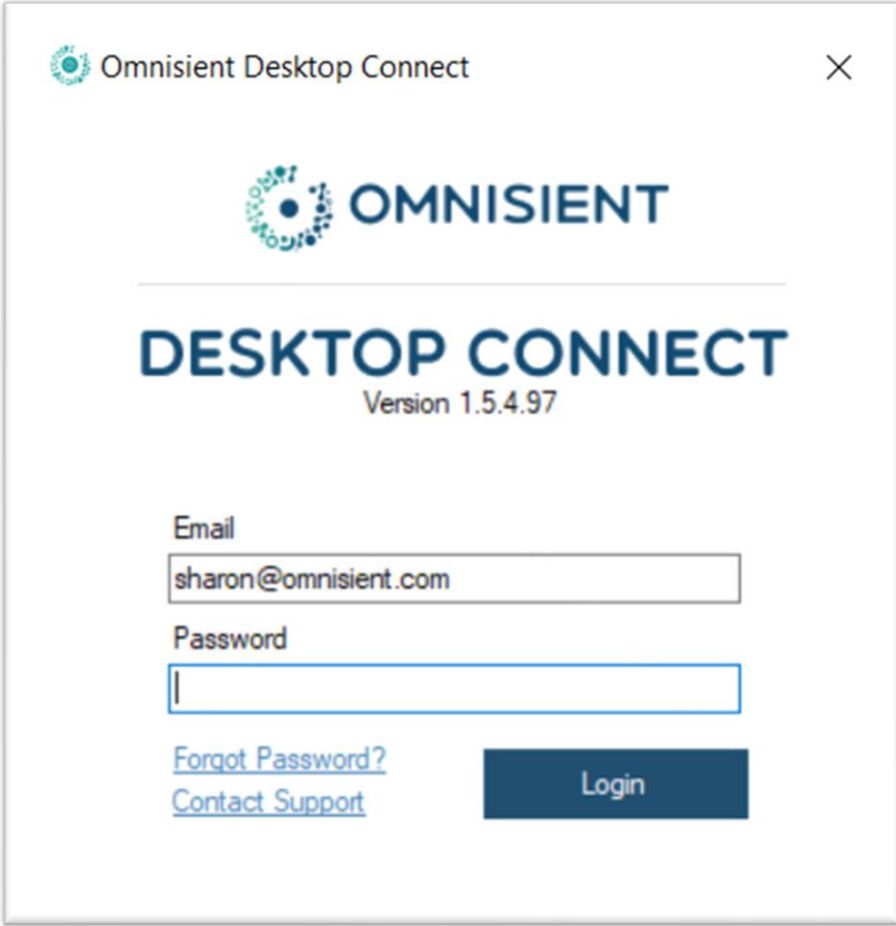
In this section we will briefly explain how you will use Desktop Connect, the Omnisient Windows-based desktop application to select your data, tokenise and cryptographically protect any personal identifier information (PII), and upload the secure, anonymous data to the Omnisient Platform.

### Data Preparation

Please see the "Data Preparation Format" section above 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.



Omnisient Desktop Connect

OMNISIENT

**DESKTOP CONNECT**  
Version 1.5.4.97

Email  
sharon@omnisient.com

Password  
|

[Forgot Password?](#)  
[Contact Support](#)

Login

### Navigating between Omnisient Apps

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

Omnisient Desktop Connect

Desktop Connect

Desktop Extractor

Omnisient Web App

Select Source

Select PII Fields

Map PII Fields

Transform

Review & Upload

Select Source

Dataset Name:

Dataset Type:

Customer

Transaction Type:

Trade Enabled

Filename:

Browse

Select Source Type:

File

Database

Predefined Schema:

None

Data Delimiter:

| - Pipe

Dataset Preview

Preview Rows: 

250

Ready

Select Fields >

The 16 | Page

## The Desktop Connect Upload process

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



### Step 1 – Select Source

During this step you will point the app to your source data.

#### *Dataset Name*

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

1. No more than 64 characters
2. No spaces
3. Alpha and Numeric characters only
4. No special characters (for example &\*!#)

There are two source options for your files – a flat file, or an SQL table.

#### Source Option 1 - File:

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

Omniscient Desktop Connect

Desktop Connect Desktop Extractor Omniscient Web App

Select Source Select PII Fields Map PII Fields Transform Review & Upload

Select Source

Dataset Name: Dataset Type: Customer Transaction Type: Trade Enabled

Filename: Browse

Select Source Type: ☒ File ☐ Database Predefined Schema: None Data Delimiter: | - Pipe

Dataset Preview Preview Rows: 250

Ready Select Fields >

Please select your prepared file containing the dataset you would like to upload.

1. Type in a name for your uploaded dataset
2. Click "Browse"
3. Choose your upload file from the wizard file-picker
4. This will auto populate a preview as shown below:

Omnisient Desktop Connect
✕

**Desktop Connect**

Desktop Extractor

Omnisient Web App

Select Source

Select PII Fields

Map PII Fields

Transform

Review & Upload

Select Source

Dataset Name:
 
ⓘ

Dataset Type:

Transaction Type:

Filename:
 

Browse

Select Source Type:
 ☒ File
 ☐ Database

Predefined Schema:

Data Delimiter:
 
ⓘ

Dataset Preview

Preview Rows:

ID	FirstName	LastName	MobilePhone	BusinessPhone	OtherPhone
6.70924E+12	Lance	Qvale	828849842	860346377	861300444
7.50631E+12	Mark	Steyn	824505146	126821085	
8.0073E+12	Naomi	Vakis	829008337	+27 (011) 3503917	117 926 442
7.90928E+12	Grant	Frank	828 236 669	+27 (011) 5077489	
8.00628E+12	Drew	Flax	792 609 772	270 112 890 665	115491900
7.91218E+12	Mariet-Su	Lewis	834094345	270 113 504 000	116425155
6.70323E+12	Linde	Gillette	828 099 555	270 113 508 563	
7.60806E+12	Bremer	Olckers	066 363 1699	(011) 476 2646	114679887

Ready

Select Fields >

## Dataset Type

Dataset Type can be one of four options:

### Customer

Customer data, generally containing one record per customer, with PII fields that need to be anonymised.

### Criteria

- Contains PII
- Can include a customer identifier, unique within the client's environment, to be used when linking to other internal tables

### Transactional

Data relating to transactions or payments by customers (e.g., retailer sales or insurer statements)

### Criteria

- Does not contain PII
- Contains a customer identifier

### Dimension

Data providing more descriptive information on specific items in other internal tables (e.g., product description, branch names and locations)

### Criteria

- Does not contain PII
- Does not contain customer identifier

### Other

Any data set that doesn't fall into the top 3 categories.

### *Transaction Type*

Transaction Type can be one of two options:

### Evaluate Only

Omnisient allows for the re-identification of individuals (only within your own environment) to permit data enrichment, audience selections and so forth. This is achieved in one of two ways - with the Omnisient iURN mechanism, or with your own internal record identifier. When Evaluate Only is selected, this is only possible via your own internal record identifier. No Omnisient iURN (record or row identifier (not an identifier of an individual)) will be saved for you, in your environment, for each record. This option can be used if you are uploading your own, client-specific record identifier to be used internally to link a consumer's record across different systems, databases and files. [This identifier must not be anonymised.](#)

### Trade


Selecting Trade will save a unique iURN per record, which can be used to match-back every record, allowing for the re-identification of individuals. This will enable, within the required consent framework, data enrichment, audience selections and so forth.



Click "Select Fields" to progress to Step 2, once you have reviewed the preview.

### Source Option 2: Database

You can also upload and anonymise directly from a database by choosing "Database":

 Omnisient Desktop Connect ×

Desktop Connect

Desktop Extractor

Omnisient Web App

Select Source

Select PII Fields

Map PII Fields

Transform

Review & Upload

Select Source

Dataset Name:  
ExampleDataset20220706

Dataset Type:  
Customer

Transaction Type:  
Trade Enabled

Configure

Select Source Type:  
☐ File ☒ Database

Predefined Schema:  
AfricanBankTest2

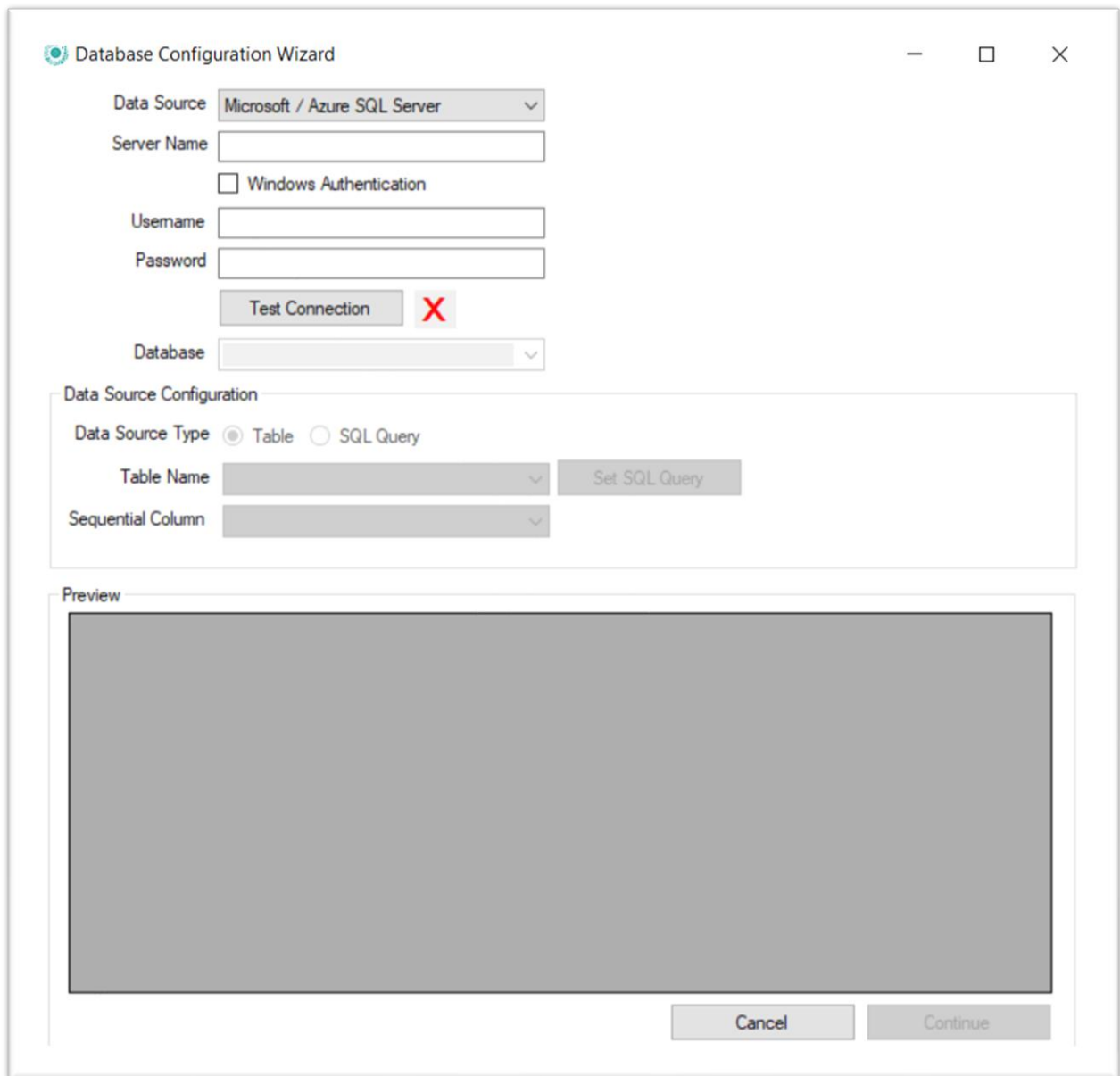
Dataset Preview

Preview Rows: 250

Ready

Select Fields >

Select Database, and click Configure, which will present you with the screen to configure your source file:



The screenshot shows the 'Database Configuration Wizard' window. It has a title bar with standard window controls. The main area contains several input fields and buttons. At the top, there's a 'Data Source' dropdown menu set to 'Microsoft / Azure SQL Server'. Below it is a 'Server Name' text box. A checkbox for 'Windows Authentication' is present and unchecked. Below that are 'Username' and 'Password' text boxes. A 'Test Connection' button is next to a red 'X' icon, indicating a failed connection. Below the password field is a 'Database' dropdown menu. A section titled 'Data Source Configuration' contains a 'Data Source Type' section with 'Table' selected (radio button) and 'SQL Query' (radio button). Below this are 'Table Name' and 'Sequential Column' dropdown menus, and a 'Set SQL Query' button. At the bottom of the wizard is a 'Preview' section with a large gray rectangular area. At the very bottom right are 'Cancel' and 'Continue' buttons.

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

Also see above, under File Source Type, for Transaction Type and Dataset Type descriptions.

Click "Select Fields" once you have reviewed the preview, to move on to Step 2.

## 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 anonymised. If the client uses PII fields to identify customers internally then no fields should be selected as a customer identifier - the anonymised 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 \(such as ID, Phone number, address, names, policy number\) have been selected for anonymisation.](#)

### 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 the 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.

Omnisient Desktop Connect

×

Desktop Connect

Desktop Extractor

Omnisient Web App

Select Source

Select PII Fields

Map PII Fields

Transform

Review & Upload

✓

Select PII Fields

Data Fields	Customer Identification Column	Predicted PII Field	Dedupe
ID	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FirstName	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
LastName	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MobilePhone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BusinessPhone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
OtherPhone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address Line 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address Line 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Postal Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EmailAddress	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hobby	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Language1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

< Select Source

Map 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.

You may now click on Map Fields to progress to the third step:

### Step 3 - Map PII Fields

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.

Omnisent Desktop Connect

Desktop Connect Desktop Extractor Omnisent Web App

Select Source Select PII Fields Map PII Fields Transform Review & Upload

Map PII Fields

Source PII Fields	Omnisent Category
ID	ID Number
FirstName	First Name
LastName	Last Name
MobilePhone	Phone No
BusinessPhone	Phone No
OtherPhone	Phone No
Address Line 1	Anonymous PI
Address Line 2	Anonymous PI
EmailAddress	Email Address

< Select Fields Transform >

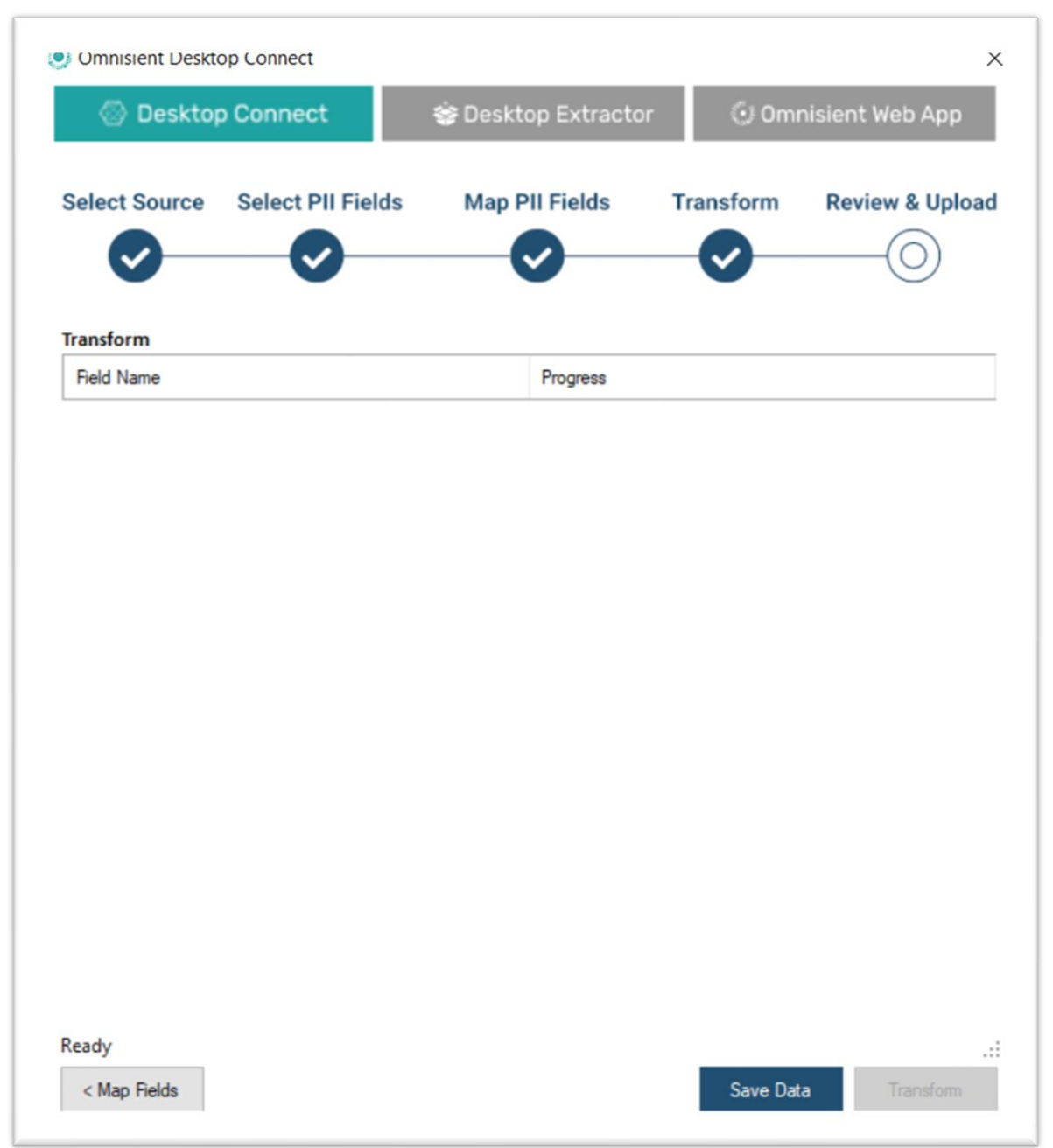
After categorising your fields, click "Transform" to proceed to Step 4.

#### Step 4 – Transform

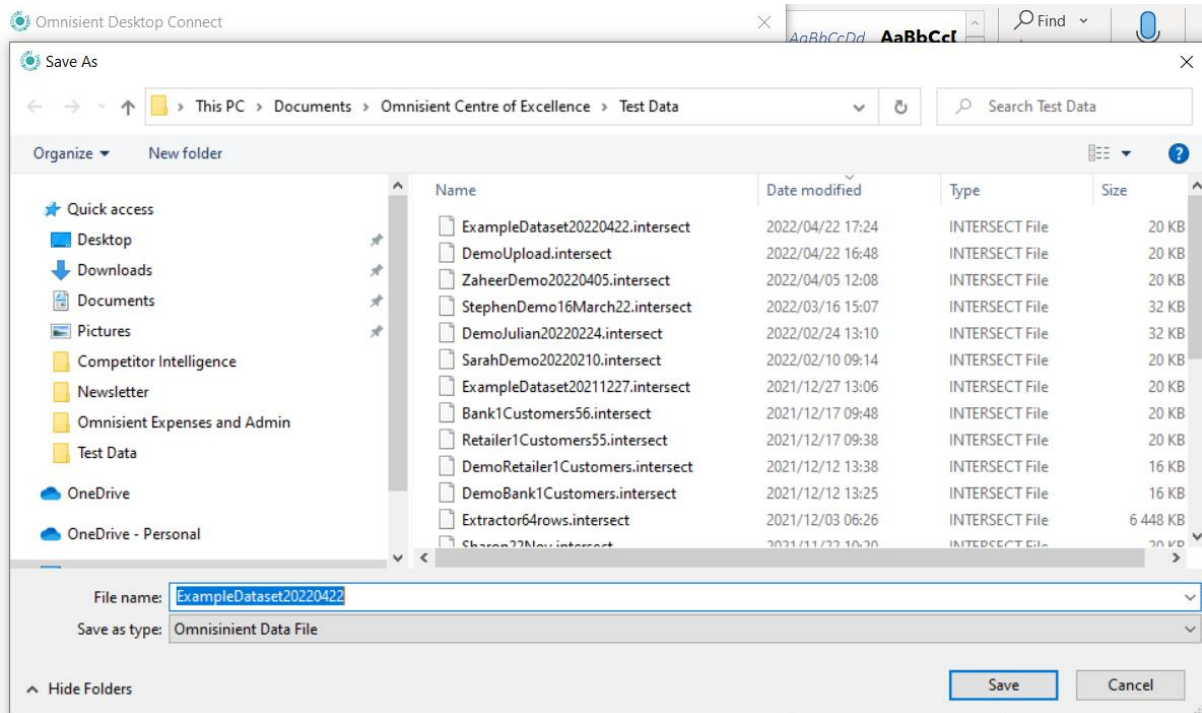
In this step we will save an iURN file that is used for re-identification back to the original dataset. We will transform the data. This includes validation, standardisation, and tokenisation to make the data private and ready for use in the Omnisent cloud.

[Save Data](#)

In this step we will save an iURN file behind the user’s firewall that is used for re-identification back to the original dataset. We add an iURN column to the original dataset and save this as a flat file. When the user receives data from the Omnisient Platform, this iURN will be provided on every row, enabling the match-back to the original dataset row.



Please click the “Save Data” button, to save your own copy of this data prior to transformation for matching back later. Note that the filetype is Omnisient Data File.



The data is now ready for transformation – click the “Transform” button:

Omnisient Desktop Connect

Desktop Connect

Desktop Extractor

Omnisient Web App

Select Source

Select PII Fields

Map PII Fields

Transform

Review & Upload

Map PII Fields

Source PII Fields	Omnisient Category
ID	ID Number
FirstName	First Name
LastName	Last Name
MobilePhone	Phone No
BusinessPhone	Phone No
OtherPhone	Phone No
Address Line 1	Anonymous PI
Address Line 2	Anonymous PI
EmailAddress	Email Address

< Select Fields

Transform >

The 28 | Page



The transformation of data includes validation, standardisation, and tokenisation in order to make the data ready for the Omnisient Platform.

**Validation:** We check that all ID's, phone numbers, emails etc. adhere to a valid format. If any data fails *VALIDATION*, it will be reported as an *ERROR* on this screen. All errors can be seen by clicking the *VIEW ERRORS* button.

**Data Quality Note** - If a large proportion of a column which 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.

**Standardisation:** We standardise PII fields to a standard format for a better matching result.

**Tokenisation:** 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](#).

As soon as the Transform process completes, you will receive the following screen:

The screenshot shows the 'Omnisient Desktop Connect' window. At the top, there are three tabs: 'Desktop Connect' (active), 'Desktop Extractor', and 'Omnisient Web App'. Below the tabs is a progress bar with five steps: 'Select Source', 'Select PII Fields', 'Map PII Fields', 'Transform', and 'Review & Upload'. The 'Review & Upload' step is currently selected, indicated by a blue circle with a white checkmark.

Under the 'Review & Upload' step, there is a section titled 'Review and Upload' with the following details:

- Dataset Name: DemoUpload
- Source Type: CSV
- File Name: Test tab delimited.txt
- Data Delimiter:

Below this is a section titled 'Successful Transformations' showing a table of transformed data:

iIDNO_1 (ID)	iFNAME_1 (FirstName)	iSNAME_1 (LastName)	iPHONE_1 (MobilePhone)	iPHONE_2 (BusinessPhone)	iPHONE_3 (OtherPhone)
34ad5b23d6670...	cb115a7ab8493...	96f8722cd577bb...	2a73b22495b3b...	b11c4c7884d37...	ff88c7ffc0ff3c
b094d6054650d...	d7cda0ca2c858...	360ffc4d1ad834...	d6cd4323e534a...	0054a82151b77...	

Below the table is a section titled 'Quality Issues' showing a table of affected mapped PII:


Affected Mapped PII	Count	View
iIDNO_1	3	
iPHONE_1	5	
iPHONE_2	8	

Below the table is a message: 'Quality Issues: Some fields in your dataset may not be usable for matching, this does not affect the upload.'

At the bottom, there is a status box that says 'Status: Transformation complete - Ready for upload' and a button labeled 'Upload >'.

If any data fails *VALIDATION*, it will be reported as an *ERROR* on this screen. All errors can be seen by clicking the magnifying glass.

You can filter and save these errors to a flat file for problem solving later.

 Data Quality error report

Filter

	iURN	Field	Value	Message
▶	276ded5d-929c-479c-9bff-4cee11...	iIDNO_1	PTAZWE005400511	Invalid ID Number - IDNO Fomat...
	bfc87d80-0961-485c-8069-15851...	iIDNO_1	EN131211	Invalid ID Number - IDNO Fomat...
	2b18806e-650a-488a-af46-78136...	iIDNO_1	DN624978	Invalid ID Number - IDNO Fomat...

Save

Save All

After you have saved the necessary error logs, you can proceed to step 5:

## Step 5 - Review & 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 tokenised. Clicking "Upload" will pop up the following screen:

Omnisient Desktop Connect

Desktop Connect Desktop Extractor Omnisient Web App

Select Source Select PII Fields Map PII Fields Transform Review & Upload

**Review and Upload**

Dataset Name: DemoUpload

Source Type: CSV

File Name: Test tab delimited.txt

Data Delimiter:

**Successful Transformations**

Field	Count	Action
iIDNO_1 (ID)	3	Search
iPHONE_1	5	Search
iPHONE_2	8	Search

**Quality Issues**

Affected Mapped Fields

Is your data correct and ready for upload? Please press Yes to continue or No to fix and reload.

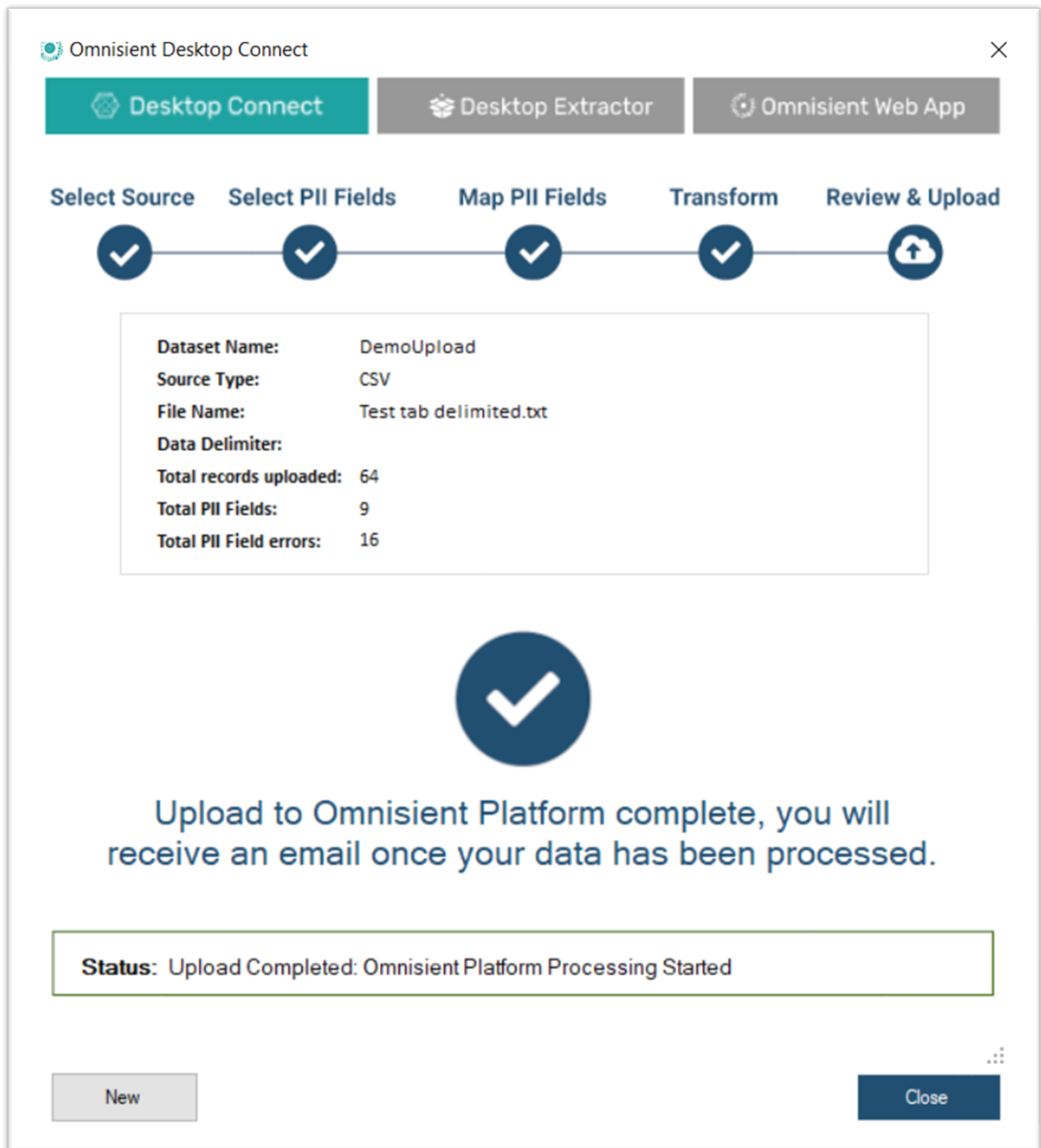
Yes No

**Status:** Transformation complete - Ready for upload

Upload >

Click "Yes" if you are sure all PII data has been hashed, and the number of errors is within an acceptable range and will not provide weak matching results.

Clicking "Yes" will start to move the data into the Omnisient Platform, with the following message once uploaded:



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

## Omnisient Web App

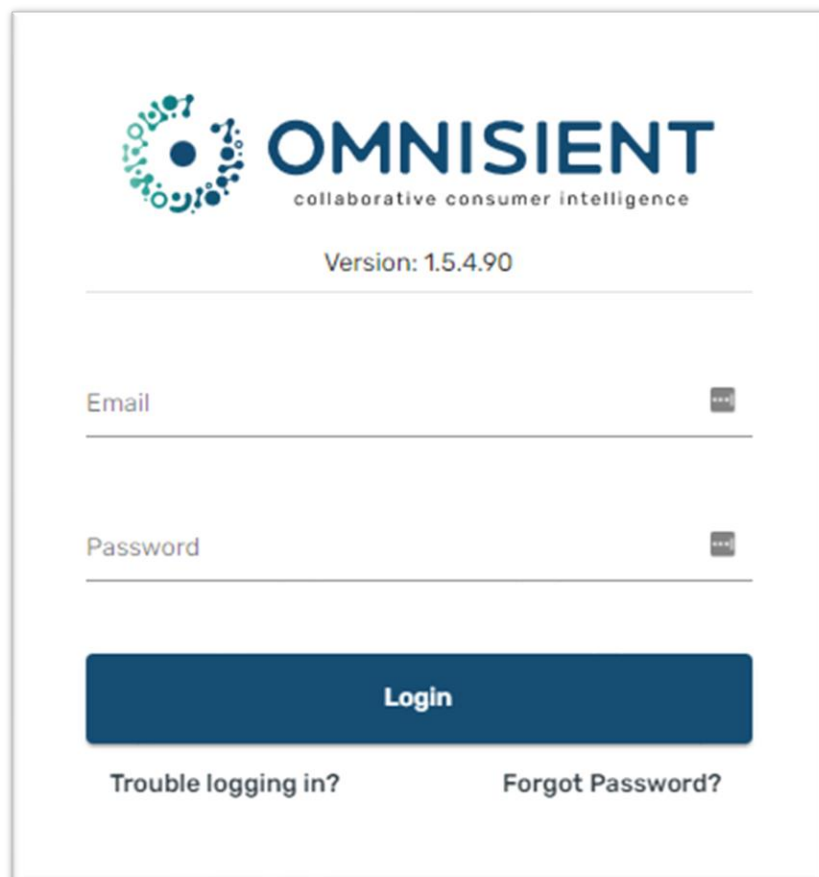
The Omnisient Web App allows you to perform the following functions:

- 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 private collaborations 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).
- Access DataRobot, our built-in Automated Machine Learning tool.

### Login

Begin by logging in using the user credentials sent via your welcome email on the following URL using any web browser:

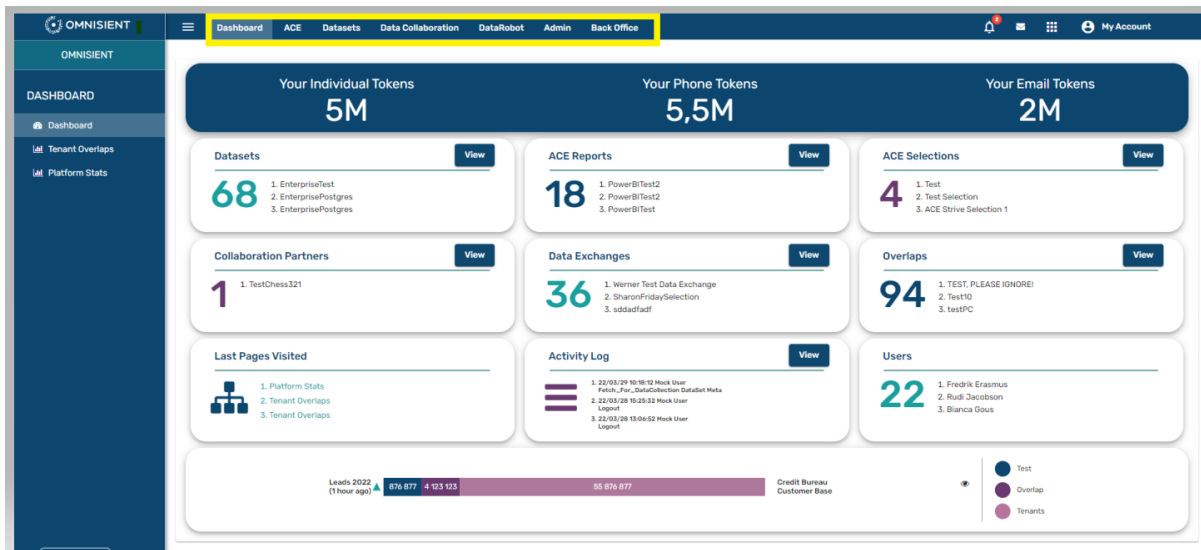
<https://app.omnisient.com>



The image shows the login page of the Omnisient Web App. At the top, there is the Omnisient logo, which consists of a circular icon made of blue and green dots, followed by the word "OMNISIENT" in a bold, blue, sans-serif font. Below the logo, the tagline "collaborative consumer intelligence" is written in a smaller, blue, sans-serif font. Underneath the tagline, the version number "Version: 1.5.4.90" is displayed in a small, grey, sans-serif font. A horizontal line separates the header from the login fields. There are two input fields: the first is labeled "Email" in a grey, sans-serif font, and the second is labeled "Password" in a grey, sans-serif font. Both fields have a small, grey, rectangular button with three dots on the right side. Below the input fields is a large, dark blue button with the word "Login" in white, sans-serif font. At the bottom of the page, there are two links: "Trouble logging in?" and "Forgot Password?", both in a grey, sans-serif font.

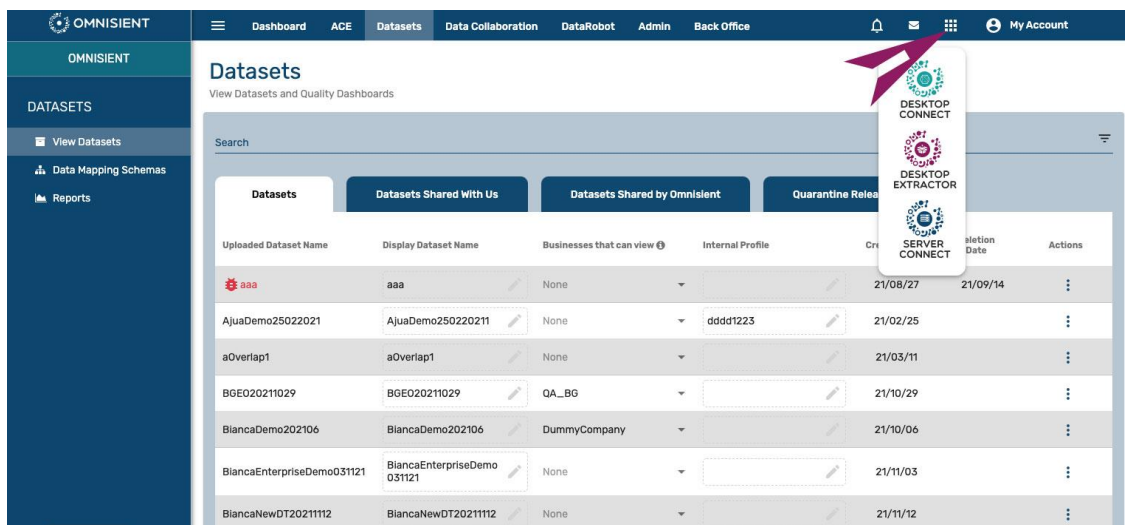
## Navigation

The Omnisient Web App is easily navigated using the top horizontal menu (highlighted in yellow below). 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 highlighted in the topbar, and the first item on the sidebar is also highlighted, indicating we are now showing the Dashboard functionality of the Dashboard main menu item:



## Accessing Desktop apps from the Web App

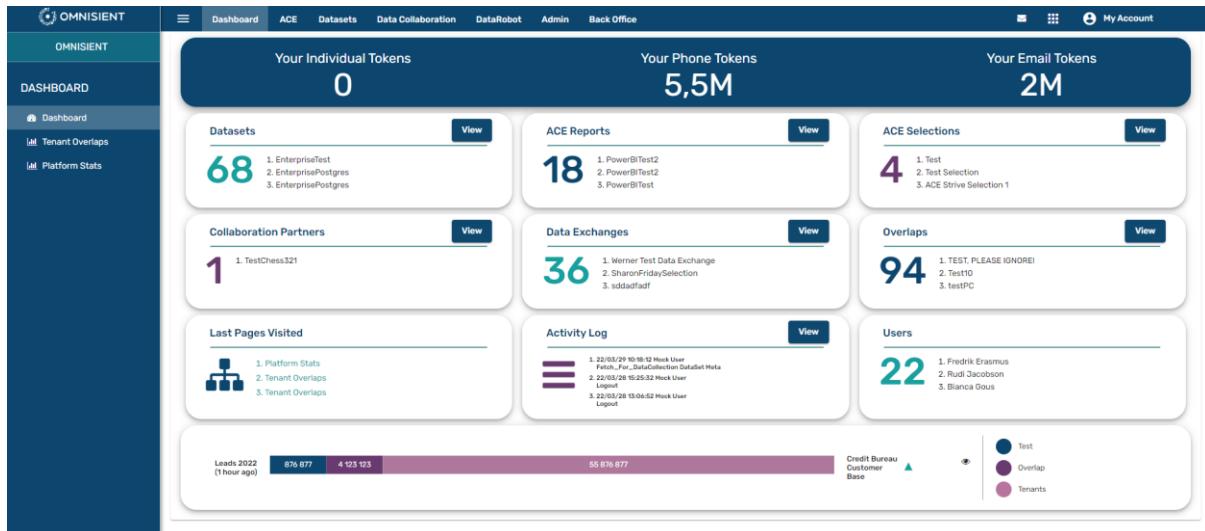
You can easily navigate between Omnisient Desktop and Web apps - no need to remember or save the links to launch them:



## Dashboard – The Omnisient Landing Page

The Dashboard is your launchpad for getting started on your work on the platform by providing not only an easy overview of your data universe in Omnisient, but also a summary of your recent work and a quick and easy way to access it.

### Dashboard

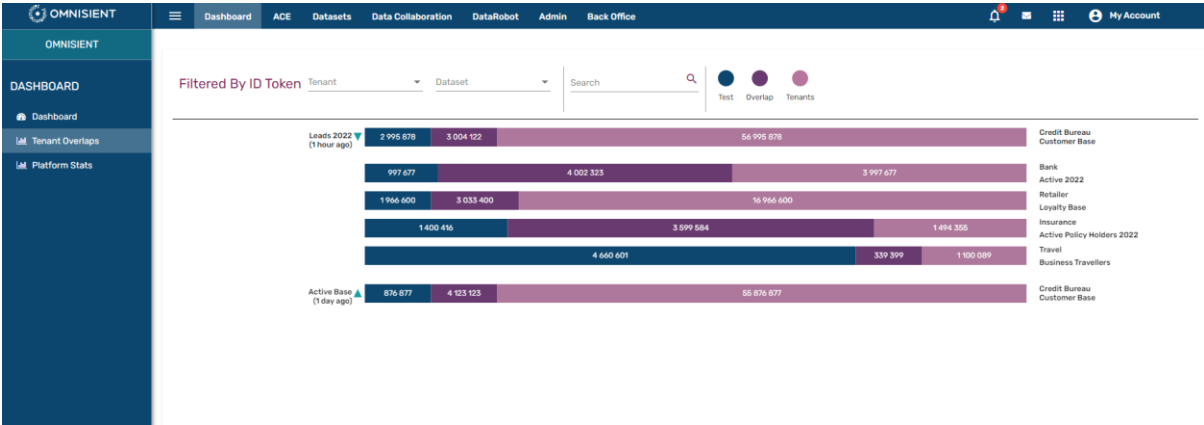


Here's a summary of the information you'll find on the Dashboard:

- **Top:** the top bar shows a summary of the total number of tokens for IDs and for phone numbers and email addresses you've loaded onto Omnisient.
- **Middle:** the middle area shows an overview of and easy access to all of your data sets, reports, overlaps, and activity in Omnisient.
- **Bottom:** the bottom bar shows the overlap of your most recently loaded dataset with the Strive Universe data.

## Tenant Overlaps

The second menu option of the Dashboard is the Tenant Overlaps. Here you can see at a glance how the data in your datasets overlap with the public tenant datasets on the Omnisient Platform:



## Platform Stats

The next item on the sidebar menu is Platform Stats, which gives a current view of the number of datasets and clients in the various verticals present on the platform which you could potentially engage with for further insights or co-marketing:

Omnisient Platform	No of Companies	No of Datasets	Unique ID Tokens	Phone No Tokens
Bureau Clients	2	6	62m	43m
Financial Services Clients	8	23	42m	36m
Insurance Clients	6	39	16m	10m
Leisure Clients	1	7	16m	35m
Marketing Services Clients	9	43	35m	25m
Retail Clients	4	8	45m	35m
Technology Clients	16	42	18m	12m
Travel Clients	1	1	12m	30m



## Datasets

Selecting the Datasets tab from the top horizontal menu allows the management of datasets including attributes and permissions. This is where you can view and manage:

- The datasets that have been uploaded by your company's users
- The datasets that have been shared **with** your company by a Private Collaboration partner
- The datasets that have been shared **by** your company with a Private Collaboration partner.
- Release datasets from quarantine, once you have ascertained that it does not actually contain PII, but only values that look like PII but in fact is not, for instance, a document number may have the format nnn-nnnn and look like a phone number.

Uploaded Dataset Name	Display Dataset Name	Businesses that can view	Internal Profile	Created on	Deletion Date	Actions
demo20211208PDB	demo20211208PDB	None		21/12/08		
demo20211210	demo20211210	None		21/12/10		
Demo20220228	Demo20220228	None		22/02/28		
demo20220407	demo20220407	None		22/04/07		
HealthDemo23112021	HealthDemo23112021	None		21/11/23		
MartinDemo01102021	MartinDemo01102021	None		21/10/01		
mock_data	mock_data	None		21/06/11		
NIDemo09112021	NIDemo09112021	None		21/11/09		
NIDemo201021	NIDemo201021	None		21/10/20		
Rudolph020422	Rudolph020422	None		22/04/02		
Rudolph040422	Rudolph040422	None		22/04/04		

You can view your datasets' attributes, update them, update field-level information related to descriptions and specify engagement terms to other clients on the platform, including which data fields can be seen or exchanged. You need to grant permission to other clients before they will be allowed to book an overlap between any of their datasets and yours, and vice versa. (You will be able to run overlaps with public datasets without any further permission).

## Managing Dataset Permissions

Under the first tab of this module, also called Datasets, you can manage dataset permissions.

Once datasets have been processed through anonymisation and have been uploaded via the Omniscient Desktop Connect or the Server Connect app, you need to set access permissions relating to datasets and individual fields. By default, no datasets and no fields are authorised for overlaps or potential exchanges.

Permission is granted at three levels: Client / Other Business Level, Dataset Level, and Field Level:

- Client Level: The other business must be ticked on the Dataset tab to allow access, and if their name does not appear on the drop-down list, they have to be invited to a private collaboration, and accept it – see the Private Collaboration section in this document.
- Dataset Level: A company may not want to share all their datasets with their collaboration partner, so each dataset needs to be authorised individually. This is done under datasets, using the “Share Dataset” option of the three dot Actions on the rightmost side of the dataset line, but only once the private collaboration has been concluded.
- Field Level: The individual fields on the dataset are marked as either permitted for data exchange or not permitted for data exchange, and a partner needs to be authorised on each individual field for both data exchanged and for use in overlap analyses.

Should you wish to make your dataset available for value exploration to all users of all clients on the Omnisient Platform (a “Public” dataset), you can do so by selecting the Datasets tab and select option “All Companies (Public)” under “Businesses that can View”. You do however still need to mark each individual field to be permitted for data exchange and for overlap analyses as described above, and you be a public tenant to make yourself publicly available. Please contact [Support](#) to enable this.

## Setting Access Control and Dataset Permissions

Select Datasets from the Sidebar Menu:

The screenshot displays the 'Datasets' management page in the Omnisient platform. The left sidebar contains the 'DATASETS' menu with options for 'View Datasets', 'Data Mapping Schemas', and 'Reports'. The main content area shows a table of datasets. The table has columns: 'Uploaded Dataset Name', 'Display Dataset Name', 'Businesses that can view', 'Internal Profile', 'Created on', 'Deletion Date', and 'Actions'. A dropdown menu is open for the dataset 'demo20220407', showing options: 'Edit Profile', 'Edit Fields', 'Share Dataset', 'Preview', and 'Delete'.

Uploaded Dataset Name	Display Dataset Name	Businesses that can view	Internal Profile	Created on	Deletion Date	Actions
demo20211208PDB	demo20211208PDB	None		21/12/08		
demo20211210	demo20211210	None		21/12/10		
Demo20220228	Demo20220228	None		22/02/28		
demo20220407	demo20220407	None		22/04/07		
HealthDemo23112021	HealthDemo23112021	None		21/11/23		
MartinDemo01102021	MartinDemo01102021	None		21/10/01		
mock_data	mock_data	None		21/06/11		
NIDemo09112021	NIDemo09112021	None		21/11/09		
NIDemo201021	NIDemo201021	None		21/10/20		
Rudolph020422	Rudolph020422	None		22/04/02		
Rudolph040422	Rudolph040422	None		22/04/04		

On this screen, you can change the Display Data Set Name, authorise which business can view your dataset (from a drop-down list of our current tenants as well as Collaboration Partners which you have set up and concluded with another company), and change the Internal Profile description of your dataset. You are also, by clicking the three dots “Actions” on the right had side, perform the functions as highlighted above.

## Actions: Descriptions & Profiles

### *Upload dataset name vs display dataset name*

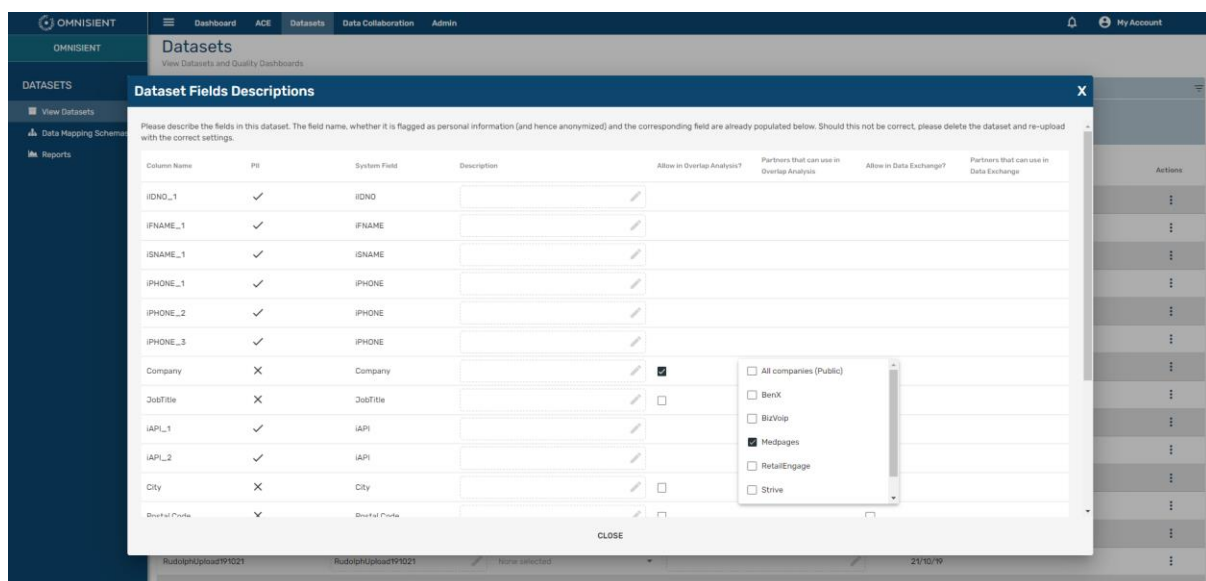
1. *Upload dataset name:* This is the name created on the onboarding app during upload of this dataset.
2. *Display dataset name:* This is the dataset name displayed to potential data collaboration partners.

### *Internal vs external profiles*

1. *Internal Profile:* Brief description visible only to your company to help different team members communicate the contents of the dataset.
2. *External Profile:* This is a comprehensive pitch detailing the value and contents of your data. This is used to showcase your data to partners

### *Field descriptions and permissions*

Under edit Fields you can set a more detailed description of each column/field in your dataset, for example: "Male or Female". You are also able to, at field level, specify if the field is allowed to be used in a future overlap analysis or a data exchange, and by which public clients the field can be used in either an overlap analysis or data exchange.



## Actions: Delete dataset

You can delete a dataset by clicking on the trash can icon next to the dataset. This will be effective within the next 24 hours.

*Back-up:* If you choose this, we archive the dataset which you can request to be restored. Otherwise, we completely remove this data from our system:

## Actions: Dataset preview – Data Summary

Your dataset preview, providing further information on the datasets, can be seen by clicking the three dots under Action, in the Overlap Analysis - Book Overlap screen or the Datasets - Datasets screen.

The screenshot shows the OMNISIENT Datasets screen. A modal titled 'Preview demo20211210' is open, displaying the 'Data Summary' tab. The modal contains the following information:

Field	Value
Uploaded Dataset name	demo20211210
Display Dataset Name	demo20211210
Internal Profile	
External Profile	
Owner of data	Omnisient
Number of rows	1 000
Unique personal identifiers	ID Number,Phone No,Anonymous PI

The background shows a list of datasets with columns: Uploaded Dataset Name, demo20211210, demo20211208PDB, HealthDemo23112021, NIDemo09112021, Created on, Deletion Date, and Actions.

Your partner's dataset overview can be seen in the same way on the "Datasets Shared With Us" page, or alternatively, while booking an overlap via Data Collaboration > Book Overlap > Step 2 > Select Partner Dataset.

The screenshot shows the OMNISIENT Book screen. A modal titled 'Preview BenX20200728' is open, displaying the 'Data Summary' tab. The modal contains the following information:

Field	Value
Dataset name	BenX20200728
Description	
Owner of data	BenX
Number of rows	2 946 252
Unique personal identifiers	Anonymous PI,Anonymous P,Last Name,Date Of Birth,ID Number

The background shows a list of datasets with columns: Partner, BenX, BizVoip, Medpages, RetailEngage, RetailEngage, No of Rows, and Preview.

## Actions: Dataset preview – Data Fields

This view shows the fields/columns in the dataset and the descriptions set.

The screenshot shows the OMNISIENT Datasets interface. A modal window titled 'Preview demo20211210' is open, displaying the 'Data Fields' tab. The modal contains a table with columns: Column name, Your column name, PI, Unique ID, System field, and Description. The table lists fields for the dataset 'demo20211210'.

Column name	Your column name	PI	Unique ID	System field	Description
numRetries	numRetries	✗	✗	numRetries	
IDNO_1	IDNumber	✓	✗	IDNO	ID Number
IPHONE_1	MSISDN	✓	✗	IPHONE	Phone No
IAPL_1	dialResult	✓	✗	IAPL	Anonymous PI

The background shows a list of datasets with columns: Uploaded Dataset Name, Created on, Deletion Date, and Actions.

## Actions: Dataset preview – Data Quality

This shows statistics and visuals on the duplicate values on PII field columns as well as Errors (which are rows that failed validation rules).

The screenshot shows the OMNISIENT Datasets interface. A modal window titled 'Preview demo20211210' is open, displaying the 'Data Quality' tab. The modal contains a table with columns: Column name, Your column name, Duplicates (% / Total), and Errors (% / Total). Below the table are two bar charts: 'Duplicates' and 'Errors'.

Column name	Your column name	Duplicates (% / Total)	Errors (% / Total)
IDNO_1	IDNumber	0 (0.0%)	277 (27.7%)
IPHONE_1	MSISDN	2 (0.2%)	36 (3.6%)
IAPL_1	dialResult	2 (0.2%)	0 (0.0%)

**Duplicates Chart:**

Column name	Duplicates
IDNO_1	0
IPHONE_1	2
IAPL_1	2

**Errors Chart:**

Column name	Errors
IDNO_1	277
IPHONE_1	36
IAPL_1	0

The background shows a list of datasets with columns: Uploaded Dataset Name, Created on, Deletion Date, and Actions.

## Actions: Dataset preview – Data Sample

This view shows a sample of values within the dataset.

The screenshot shows the OMNISIENT Datasets interface. A modal window titled 'Preview demo20211210' is open, displaying the 'Data Sample' tab. The modal contains a table with the following data:

IDNO_1 (IDNumber)	IPHONE_1 (HSISDN)	IAPL_1 (dialResult)	numRetries
*encrypted*	*encrypted*	*encrypted*	0
*encrypted*	*encrypted*	*encrypted*	1
*encrypted*	*encrypted*	*encrypted*	1
*encrypted*	*encrypted*	*encrypted*	1
*encrypted*	*encrypted*	*encrypted*	0
*encrypted*	*encrypted*	*encrypted*	0
*encrypted*	*encrypted*	*encrypted*	1
*encrypted*	*encrypted*	*encrypted*	1
*encrypted*	*encrypted*	*encrypted*	0

The background shows the 'Datasets' list with columns: Uploaded Dataset Name, Created on, Deletion Date, and Actions. The list includes datasets like 'demo20220407', 'Rudolph040422', 'Rudolph020422', 'StephenDemo16March22', 'SBSADemo', 'Demo20220228', 'UTUdemo', 'demo20211210', 'demo20211208PDB', 'HealthDemo23112021', and 'NIDemo09112021'.

## Actions: Dataset preview – Upload History

This view shows who last uploaded the dataset, number of records as well as other relevant information:

The screenshot shows the OMNISIENT Datasets interface. A modal window titled 'Preview demo20211210' is open, displaying the 'Upload History' tab. The modal contains a table with the following data:

Date	Number of Rows	Errors	Quarantined	Processed	Total Rows	User	Deletion Date	Actions
21/12/10	1000	313	✗	✓	1000	Paul de Beer		

The background shows the 'Datasets' list with columns: Uploaded Dataset Name, Created on, Deletion Date, and Actions. The list includes datasets like 'demo20220407', 'Rudolph040422', 'Rudolph020422', 'StephenDemo16March22', 'SBSADemo', 'Demo20220228', 'UTUdemo', 'demo20211210', 'demo20211208PDB', 'HealthDemo23112021', and 'NIDemo09112021'.

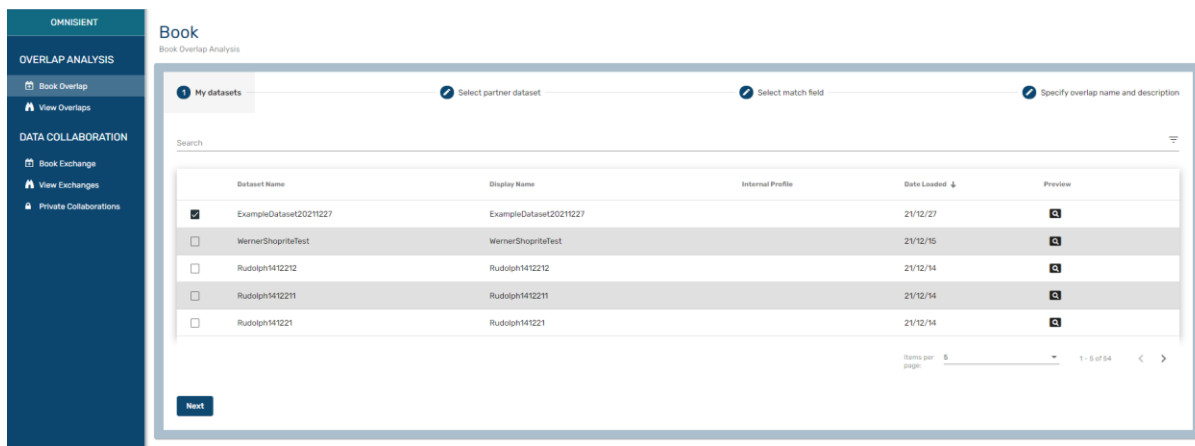
## Data Collaboration

This module provides the following collaboration functions:

- To run data overlaps with other companies
- To exchange data with other companies (available soon)
- To set up private collaborations with other companies.

### Book Overlap

To book an overlap between any of your uploaded datasets and another one you select Book Overlap from the Overlap Analysis section of the sidebar menu, which will help you select the datasets for overlap, and instruct the system to schedule an overlap between the selected datasets:



Note the four steps running across the page under Book Overlap. We will step through these 4 steps to book an overlap.

1. **Select my dataset:** Please select your dataset you wish to run and overlap with. You can search for your dataset by name or, should there be a large number of datasets, order by date to easily find the most recently uploaded dataset. Be sure to Preview your dataset (by clicking the Preview icon on the right) so that you are aware of your PII (Match) fields and data quality.
2. **Select Partner Dataset:** Please select partner dataset you wish to run an overlap with. Please note you can only access datasets you have been given permissions for. Kindly contact your account manager if you do not see a company's dataset you are searching for. Select your partner dataset and click Next.

**Preview:** Be sure to preview partner datasets to understand the partner data, PII (Match) fields and data quality.

**Public or Private:** Note that to the right of the Search field, you can select Public or Private. This is where you can select only partnerships which have previously been selected on the platform. Please see Private Projects for information on how to set up a Private Collaboration.

**Book**  
Book Overlap Analysis

1 My datasets 2 Select partner dataset 3 Select match field 4 Specify overlap name and description

Search Filter by partner type  
Public

Some datasets may be disabled as they do not contain any matching fields from your dataset (0623Test)

Partner	Dataset	Description	No. of Rows	Preview
<input type="checkbox"/> BenX	BenX20200728		2946252	
<input checked="" type="checkbox"/> Medpages	MedpagesPractitioners	Available to match with buyers	98076	
<input type="checkbox"/> RetailEngage	6mnb@frxID3June2020v1		176152	
<input type="checkbox"/> Strive	StriveUniverse		64851331	
<input type="checkbox"/> Zeltz	ZETZ Positive responders		466553	

Items per page: 5 1 - 5 of 7 < >

Back Next

3. **Select Match Field:** Please select the common match field (PII) you would like to run the overlap between the two datasets and click Next.

**Book**  
Book Overlap Analysis

1 My datasets 2 Select partner dataset 3 Select match field 4 Specify overlap name and description

Health ID Number

Items per page: 5 0 of 0 < >

Back Next

4. **Name and Description:** Type in a name for your Overlap and a description.

**Book**  
Book Overlap Analysis

1 My datasets 2 Select partner dataset 3 Select match field 4 Specify overlap name and description

Name  
DemoOverlap 20211227

Description  
Demo to illustrate overlap

Back Book

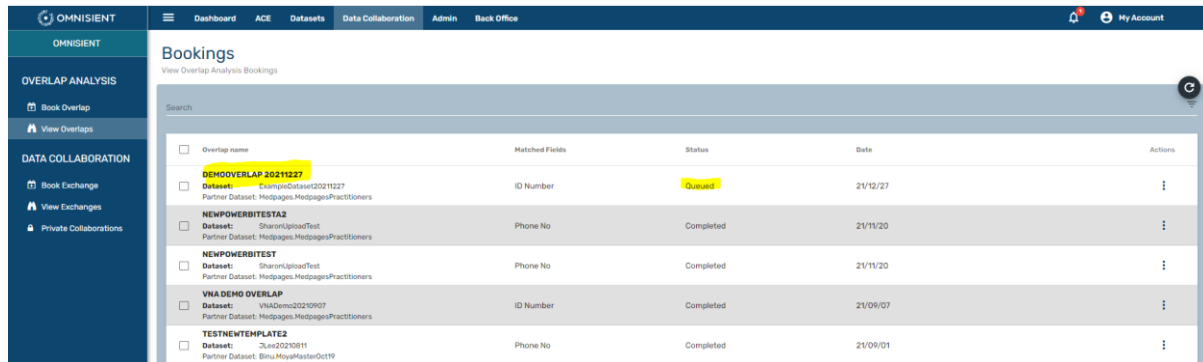
Click "Book" once Name and Description has been filled in. This will book an overlap and you can now navigate to the View Bookings screen, where the status or results of your booking will be available.



## View Bookings

This screen shows all the overlaps you have booked and their status.

Please note: If the overlap is still running the status will show "Queued". If the overlap is completed, please click "View Report" under "Actions" to view the results.



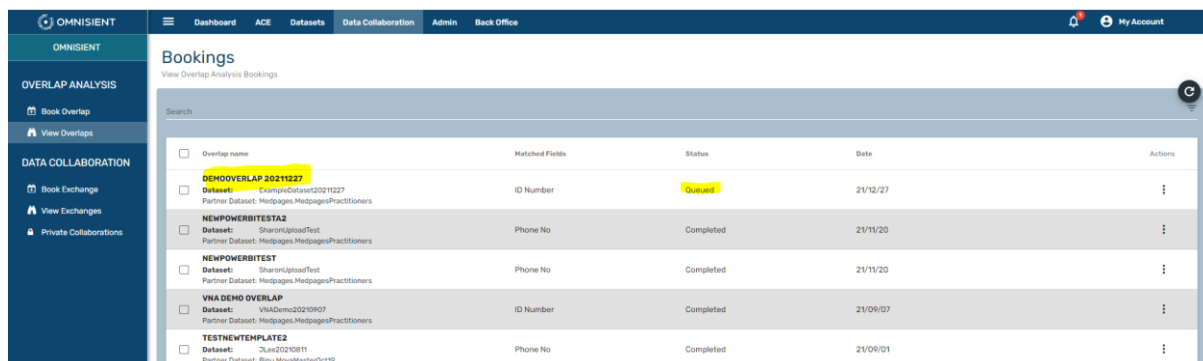
The screenshot shows the OMNISIENT interface with the 'Bookings' tab selected. The left sidebar contains navigation options: OMNISIENT, OVERLAP ANALYSIS (Book Overlap, View Overlaps), and DATA COLLABORATION (Book Exchange, View Exchanges, Private Collaborations). The main content area displays a table of booked overlaps.

Overlap name	Matched Fields	Status	Date	Actions
<input type="checkbox"/> DEMOOVERLAP 20211227 Dataset: ExamplDataset20211227 Partner Dataset: Medpages.MedpagesPractitioners	ID Number	Queued	21/12/27	⋮
<input type="checkbox"/> NEWPOWERBITEST2 Dataset: SharonUpoadTest Partner Dataset: Medpages.MedpagesPractitioners	Phone No	Completed	21/11/20	⋮
<input type="checkbox"/> NEWPOWERBITEST Dataset: SharonUpoadTest Partner Dataset: Medpages.MedpagesPractitioners	Phone No	Completed	21/11/20	⋮
<input type="checkbox"/> VNA DEMO OVERLAP Dataset: VNA Demo20210907 Partner Dataset: Medpages.MedpagesPractitioners	ID Number	Completed	21/09/07	⋮
<input type="checkbox"/> TESTNEWTEMPLATE2 Dataset: JLee20210811 Partner Dataset: Bina.NoyeMasterOct19	Phone No	Completed	21/09/01	⋮

## View Overlap

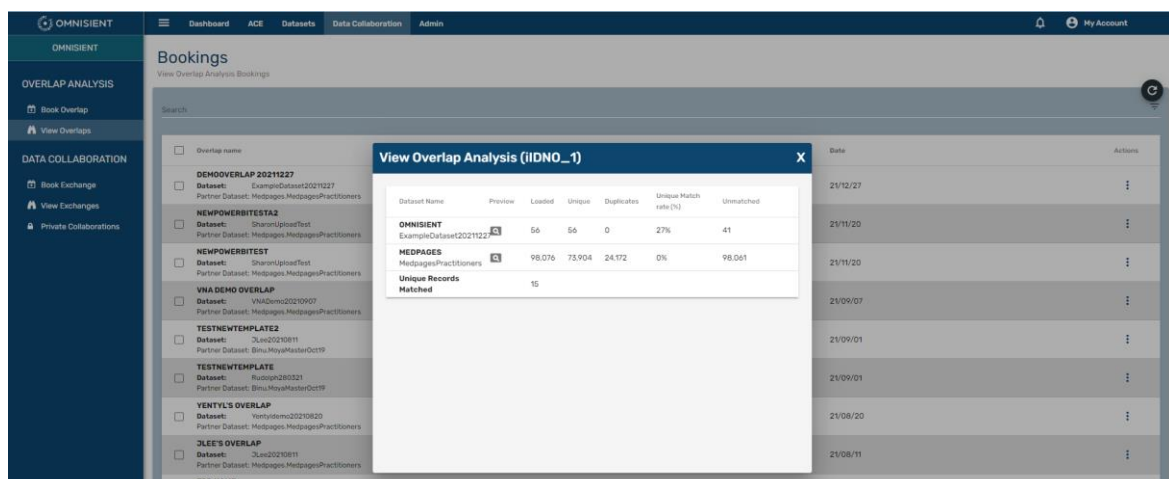
Here you can view the results of the booked and executed overlap.

Click on the three dots to the right of a completed overlap to view. Here you can View Summary, View Report, Execute Exchange (available soon) and Delete the overlap.



This is an identical screenshot of the OMNISIENT Bookings page as shown above, displaying the list of booked overlaps.

Below is the Summary Report after clicking "Summary" on the three dots menu:

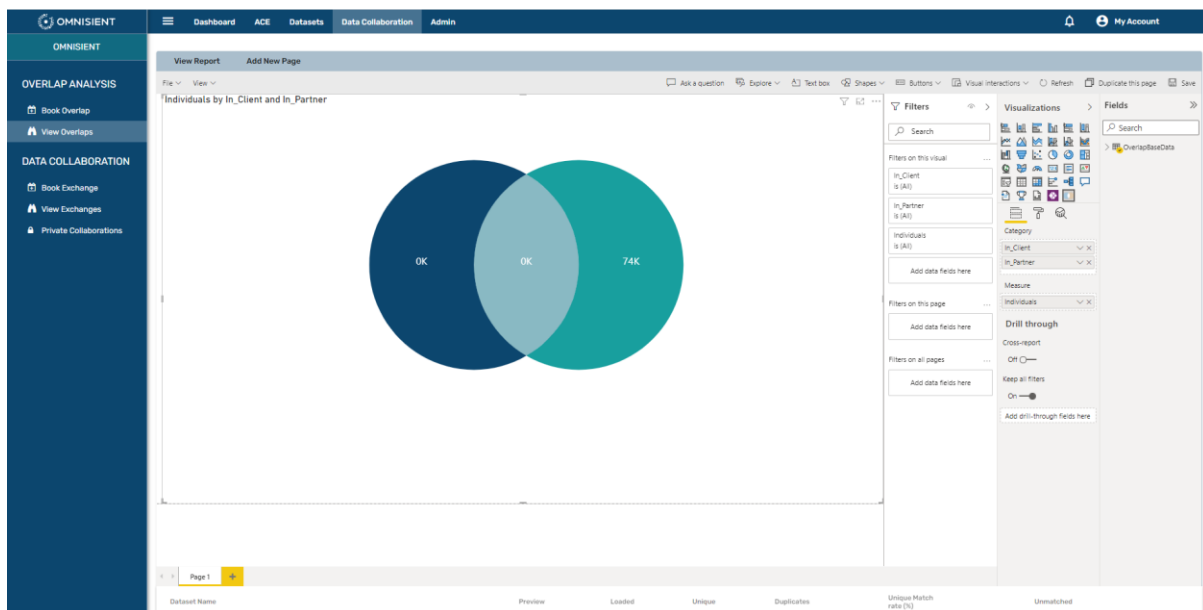


The screenshot shows the OMNISIENT interface with the 'Bookings' tab selected. A modal window titled 'View Overlap Analysis (IIDNO\_1)' is open, displaying a summary report for the 'DEMOOVERLAP 20211227' overlap.

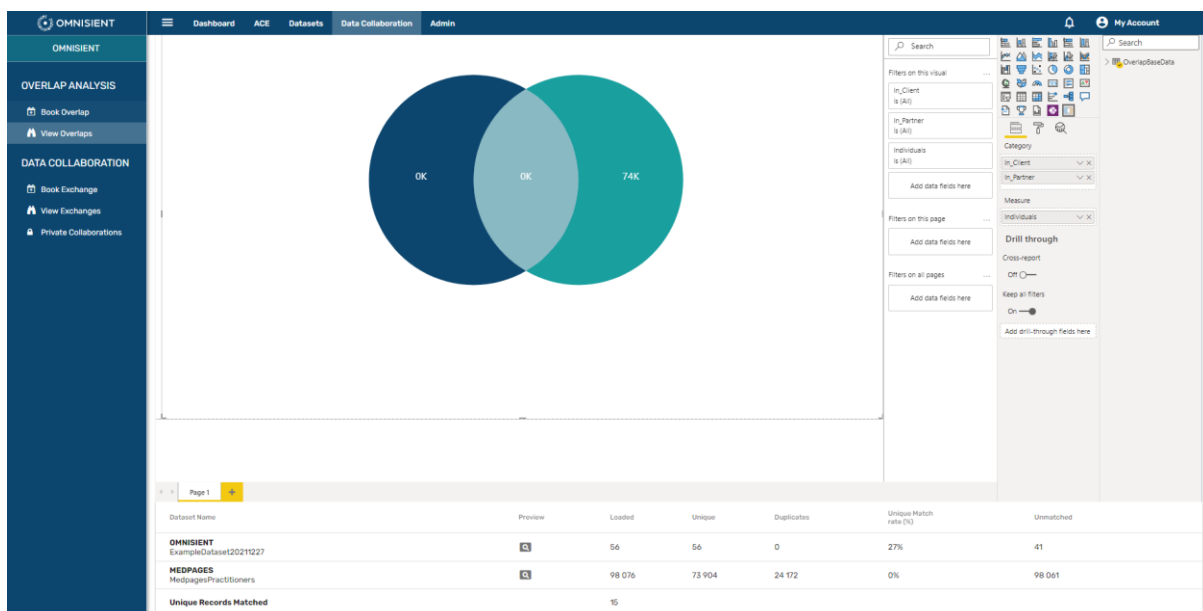
Dataset Name	Preview	Loaded	Unique	Duplicates	Unique Match rate (%)	Unmatched
OMNISIENT		56	56	0	27%	41
HEDPAGES		98,076	73,904	24,172	0%	98,061
Unique Records Matched		15				

The modal also shows a list of other overlaps in the background, including NEWPOWERBITEST2, NEWPOWERBITEST, VNA DEMO OVERLAP, TESTNEWTEMPLATE2, TESTNEWTEMPLATE, VENTYL'S OVERLAP, and JLEE'S OVERLAP.

Below is a summary of the Overlap Report after clicking on the “View Report” option on the three dots Actions menu. Note that View the Report will take a little while to initiate the report server before the report is rendered.



Scroll down to show the bottom of the page (pull your cursor all the way to the right, and scroll down):



## Private Collaborations

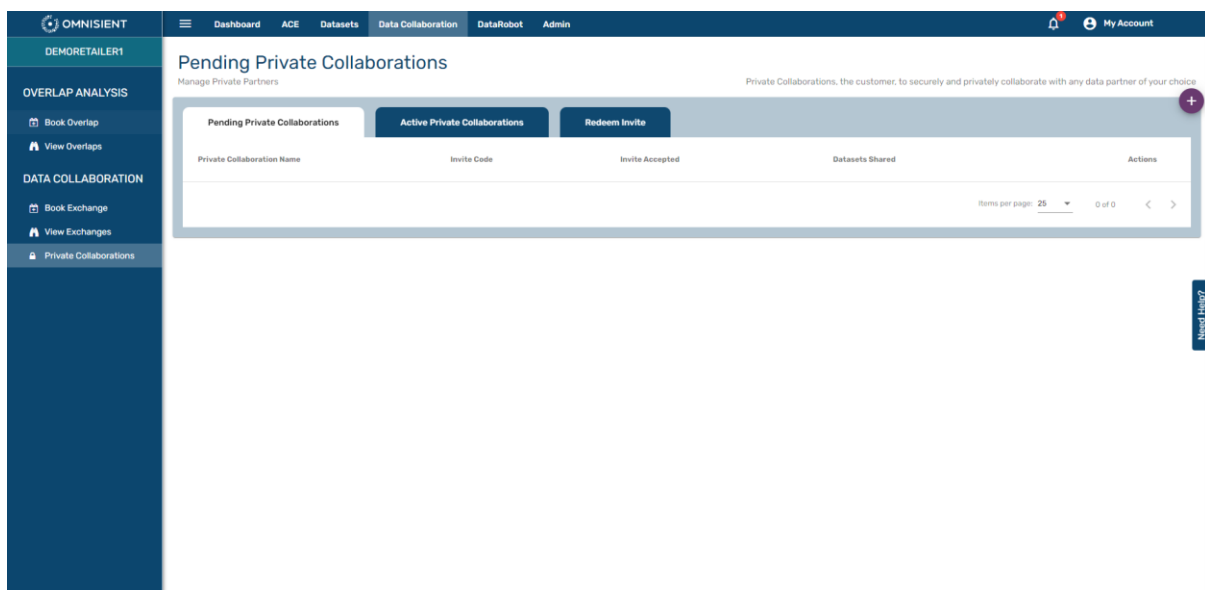
The Private Collaborations module allows companies to perform overlap analyses or data exchanges with partner companies privately, that is without creating any public footprint or visibility to further companies on the platform. No other company except collaboration partners will have visibility of each other on the platform.

Three things need to be in place:

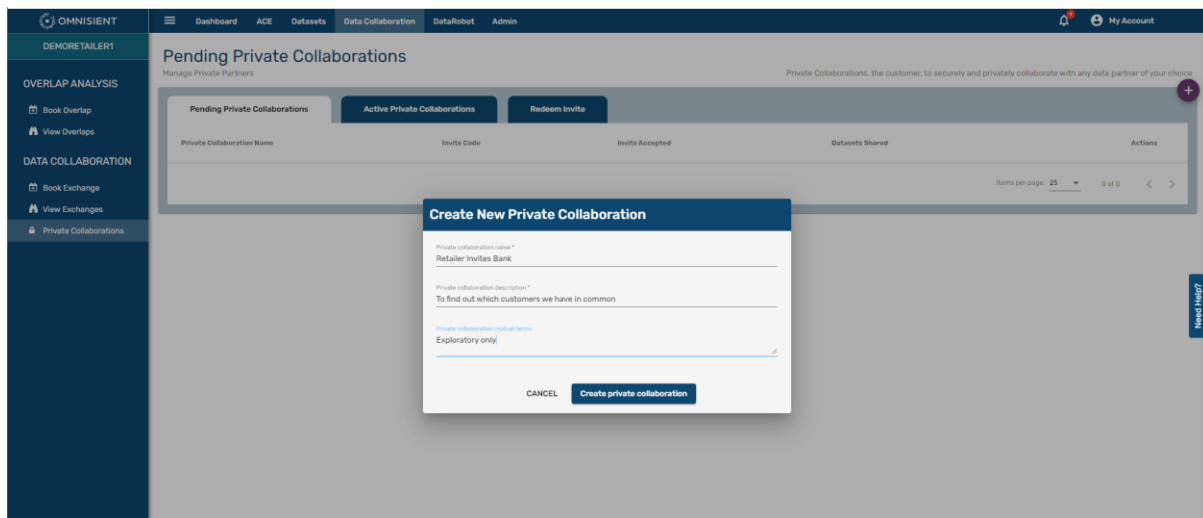
- [A Private Collaboration at Company Level](#) (done on the Data Collaboration Tab, Private Collaboration sidebar menu item)
- [Dataset Sharing for each Dataset](#) to be shared with another company (done on the Dataset Tab, View Datasets sidebar menu item, and under the three dots under Actions on the right, the Share Dataset option).
- [Field level Permissions for each dataset](#) (done on the Dataset Tab, View Datasets sidebar menu item, and under the three dots under Actions on the right, the Edit Fields option).

### Add Private Collaboration

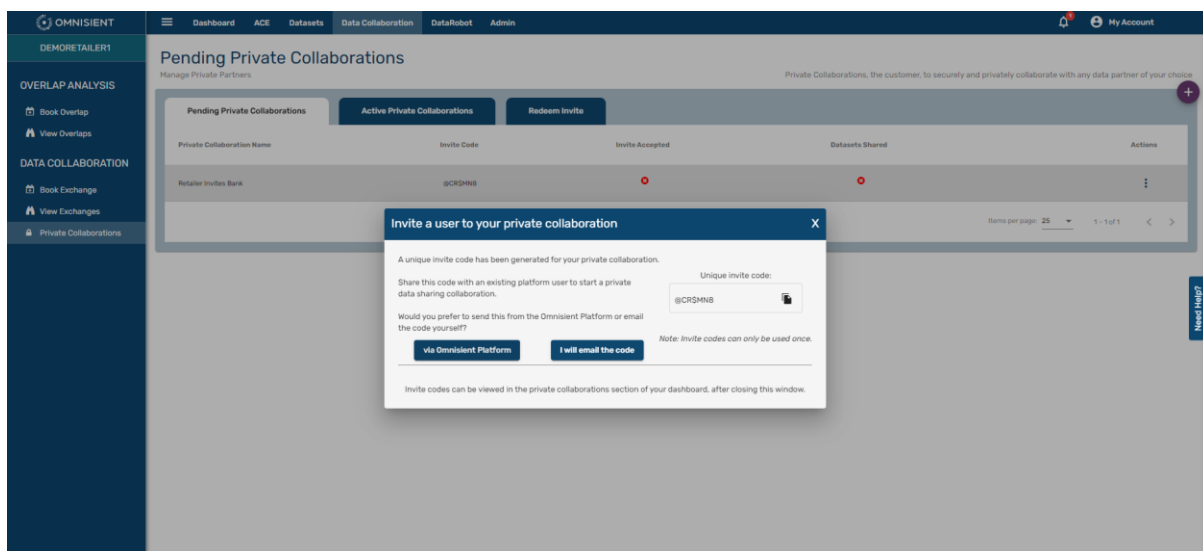
We create a private collaboration with a partner we wish to engage with, by navigating to on the Data Collaborations option on the horizontal menu, and then by selecting the Private Collaborations sidebar menu item and clicking the (+) button on the top right of the page:



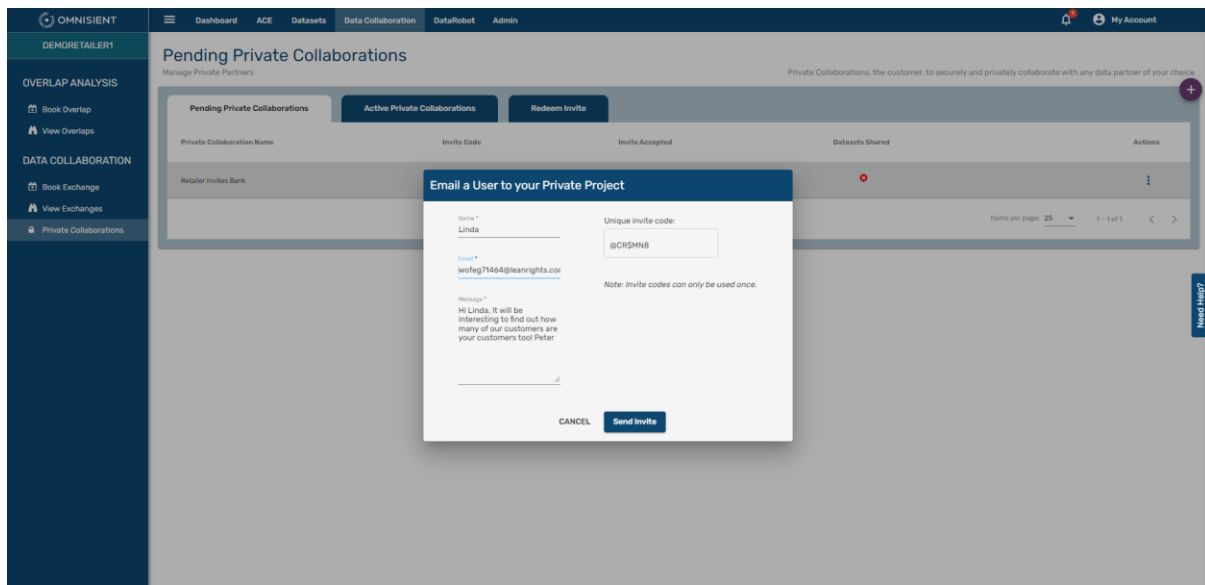
After clicking on the (+) icon, the following screen will appear:



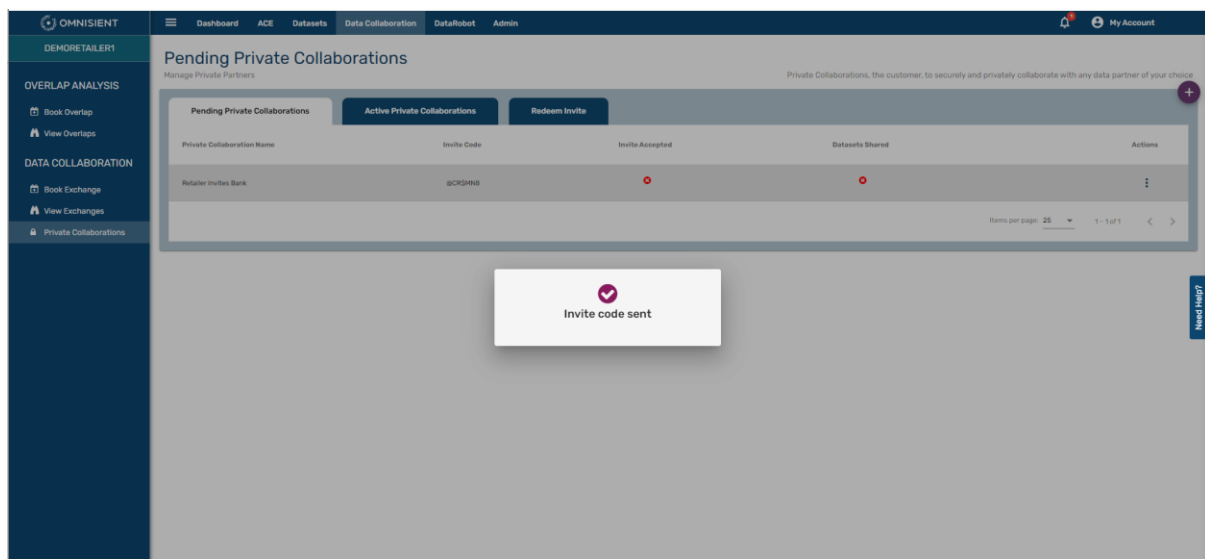
Fill in the required details to create the new private collaboration. The system will then generate a unique, single use invite code which can either be sent manually to a representative of the invited company outside of the Omnisent Platform, or you can allow the Omnisent Platform to generate and send the invitation directly. Should you wish to send the email directly, copy the invite code, proceed to your own email system, and send the email. The user may or may not be a current user on the Omnisent Platform. If not, the Omnisent generated email will guide them to contact Omnisent for credentials.



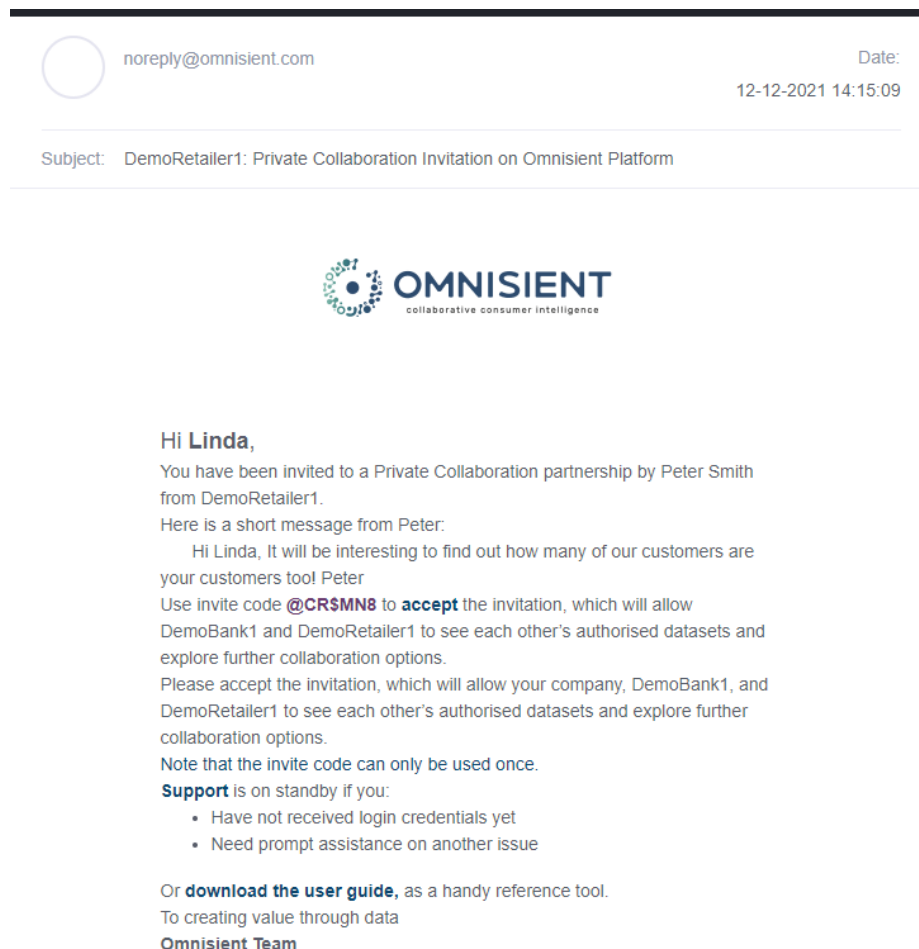
For an Omnisient-generated email, click on the left button, "Via Omnisient Platform" and complete the form. Please make sure there are no blanks after the email address:



Click "Send Invite".

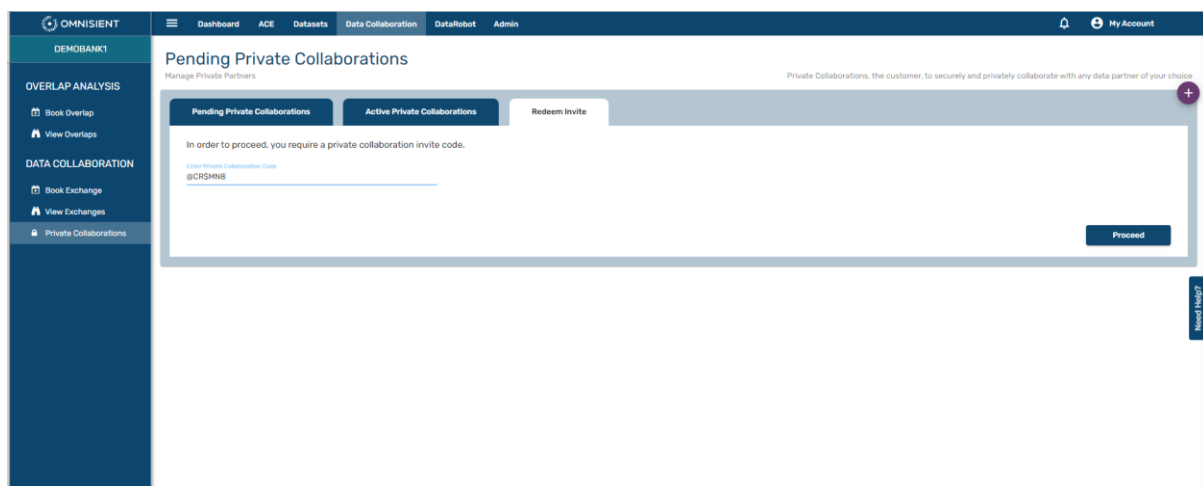


The recipient will receive an email and can accept the private collaboration request, at which point a Private Collaboration Link is created between the two companies. These two companies will now be able to collaborate using each other's datasets privately on the Omnisient Platform:

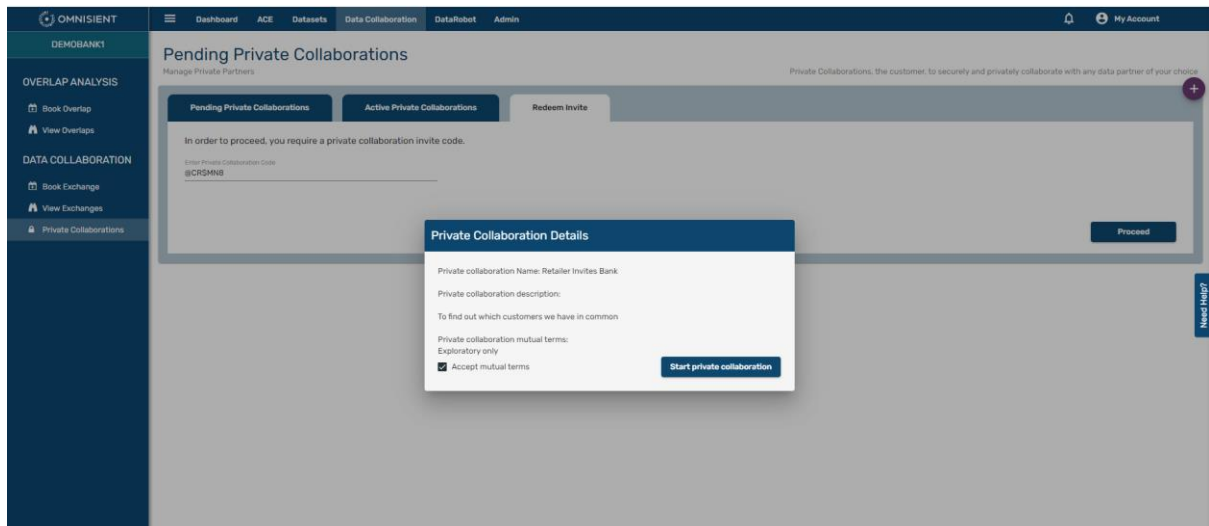


### Accepting an Invitation – Redeem Invite

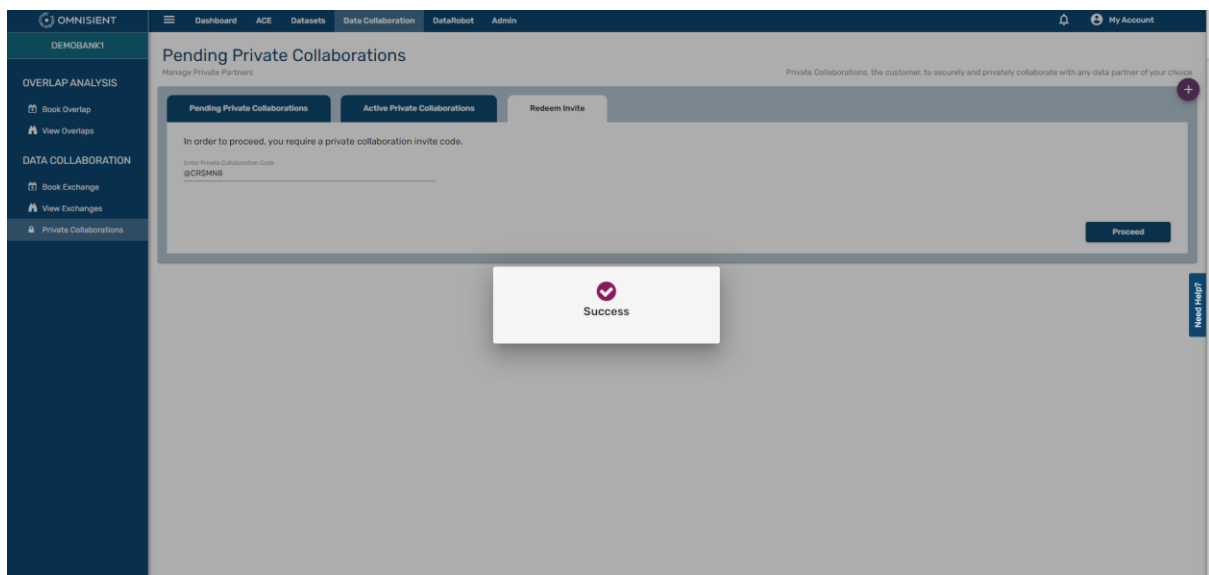
The invitee will be guided to the “Redeem Invite” tab within the Data Collaborations module, where they can start the process of accepting or rejecting the invitation:



They fill in the invite code using the single-use invite code one emailed to them, and click on "Proceed":

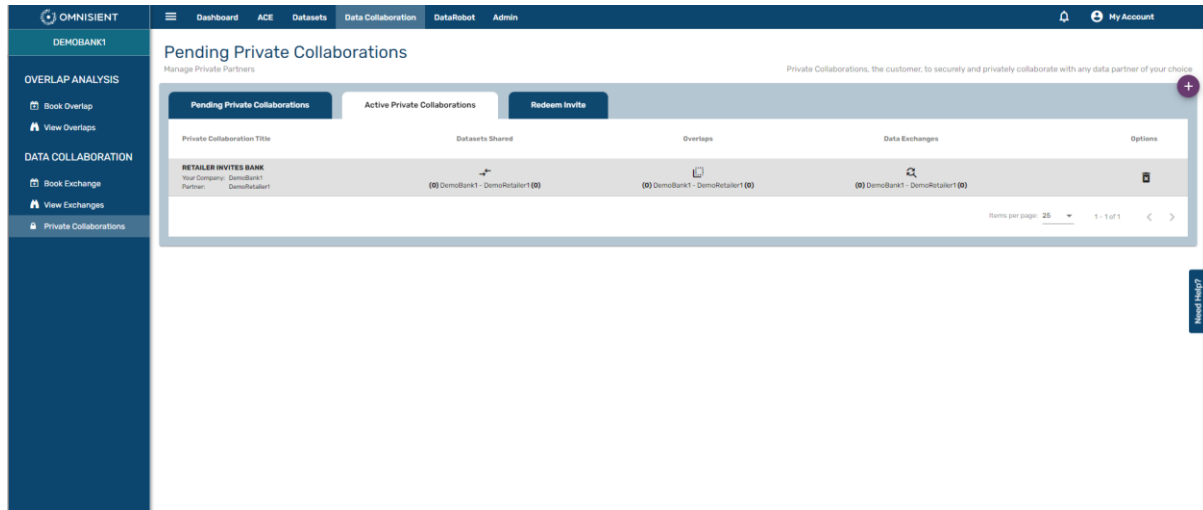


Once accepted the invitee will see the success message:



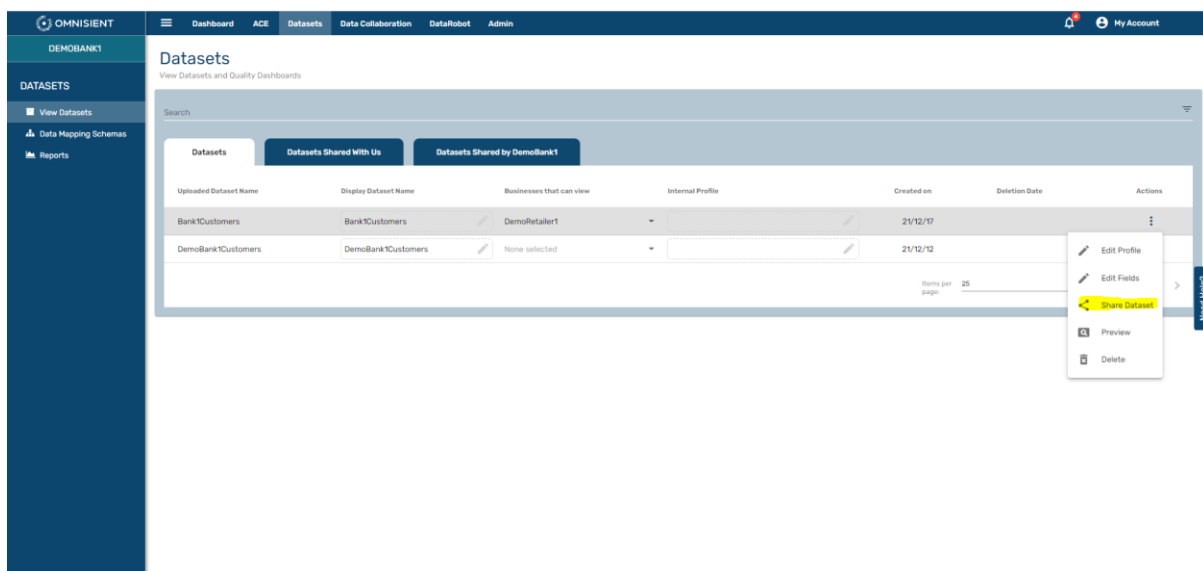
## Viewing and Deleting Active Private Collaborations

You will be able to see all active private collaborations as well as the newly created collaboration on the Active Private Collaborations page. You have the option to delete a private collaboration on the far right, under “Actions”. This will remove the ability of the two companies to privately award permissions to and share insights with one another.



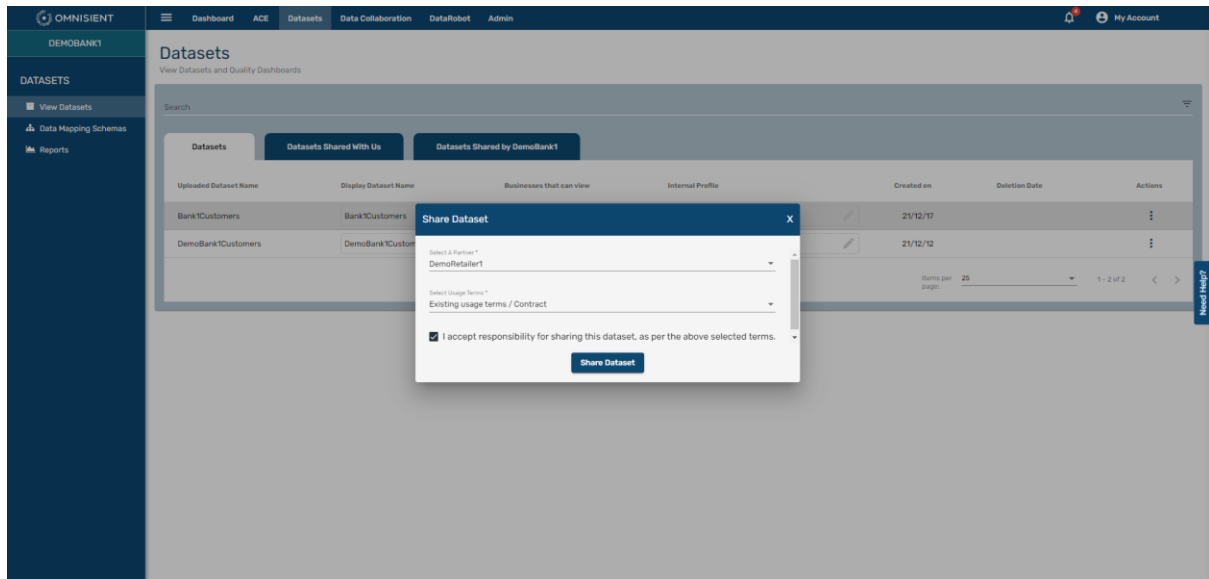
## Sharing Datasets within a Private Collaboration

One more step remains to enable the sharing of datasets privately, and that is to share a specific dataset within the Private Collaborations module. This is done by clicking on the three dots under actions for the specific dataset you want to share, and then selecting “Share Dataset”:

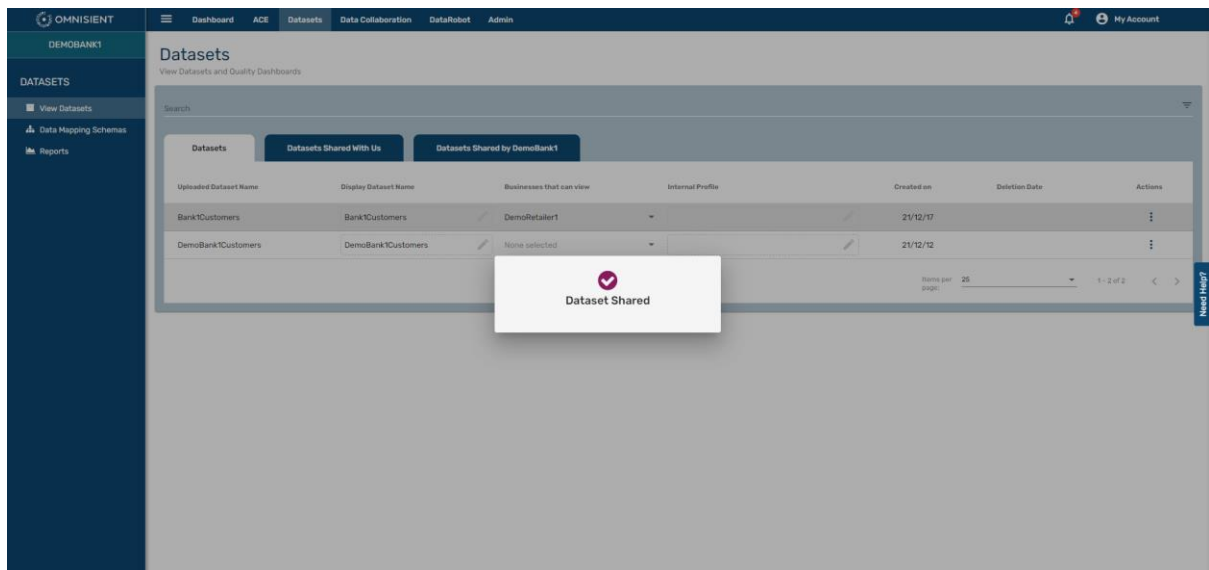




Fill in the name of the partner you want to share the dataset with, specify or select the terms, accept, and click “Share the Dataset”.

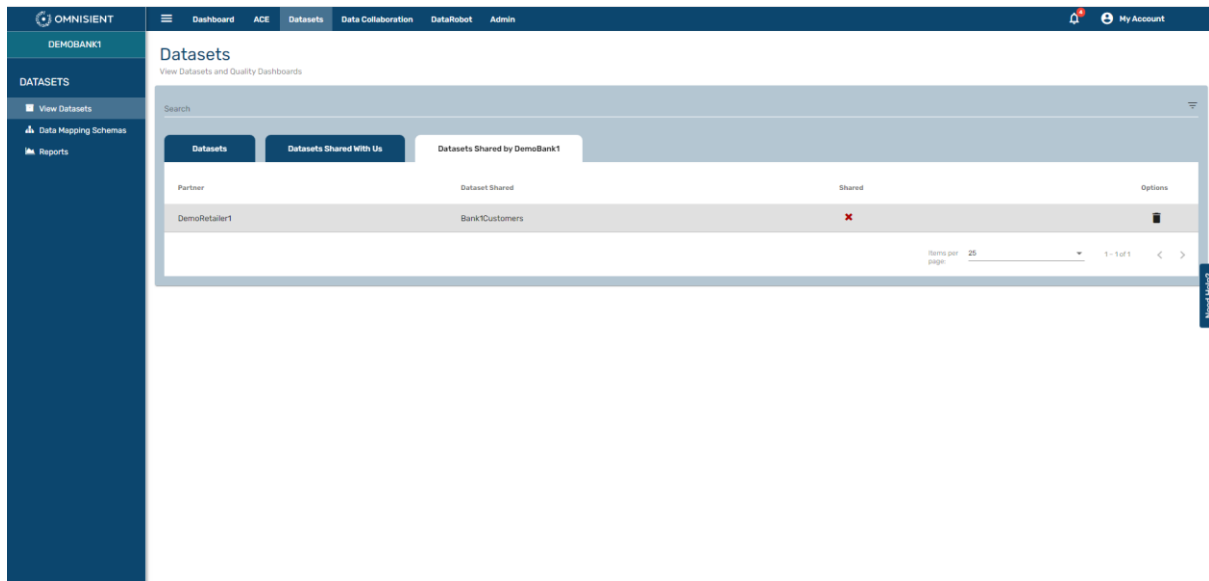


You will receive the “Dataset Shared” message below:

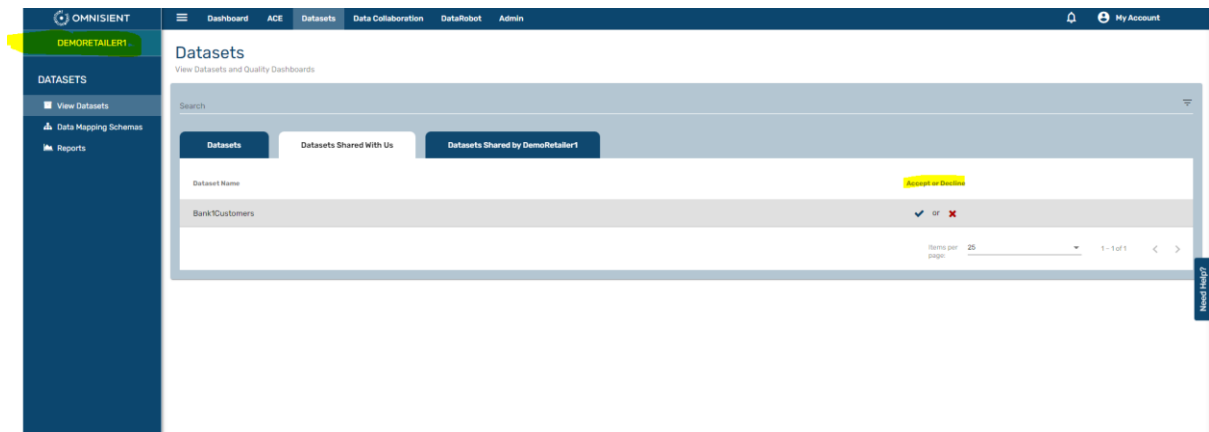


### View Shared Datasets within a Private Collaboration

The Datasets Shared by Us will also now be populated with the newly shared dataset and the company who you have shared it with. The red cross will change to green once the other company has accepted the invitation.



The invited company, DemoRetailer1, will receive an email notification about the Dataset Share Invitation, and will be guided by the email to the following page, on the View Datasets module, where they can accept or reject the Dataset Share invitation:

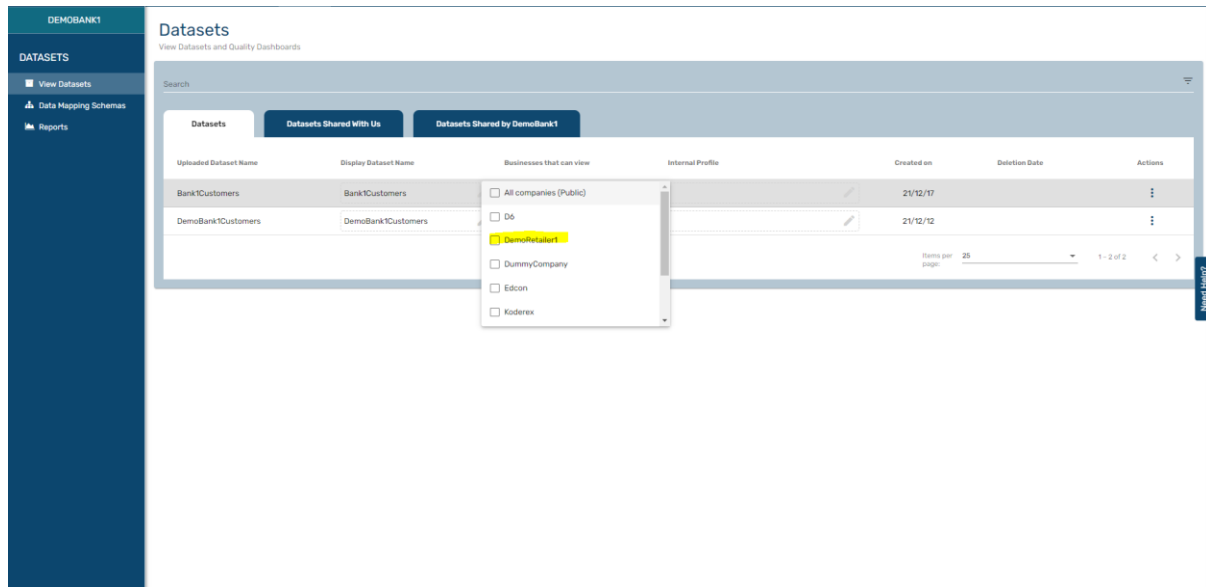


As soon as they accept, the collaboration setup for this dataset will be concluded.

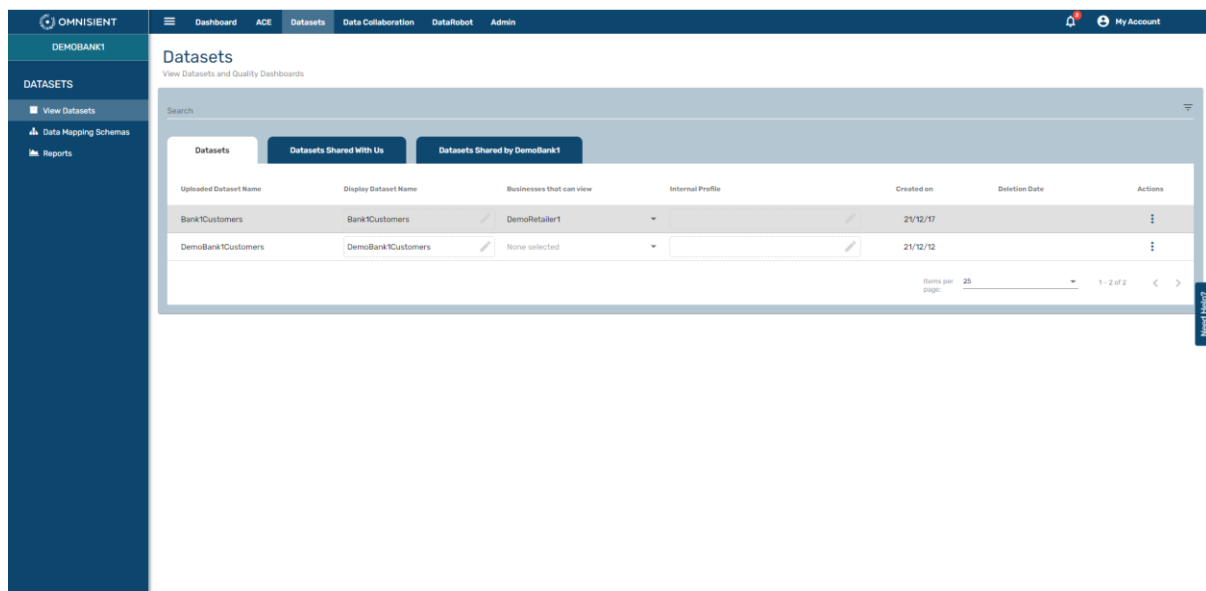
### Permissions within Private Collaborations

Permissions to individual datasets must be set in the Datasets module as previously described in this document and shown below.

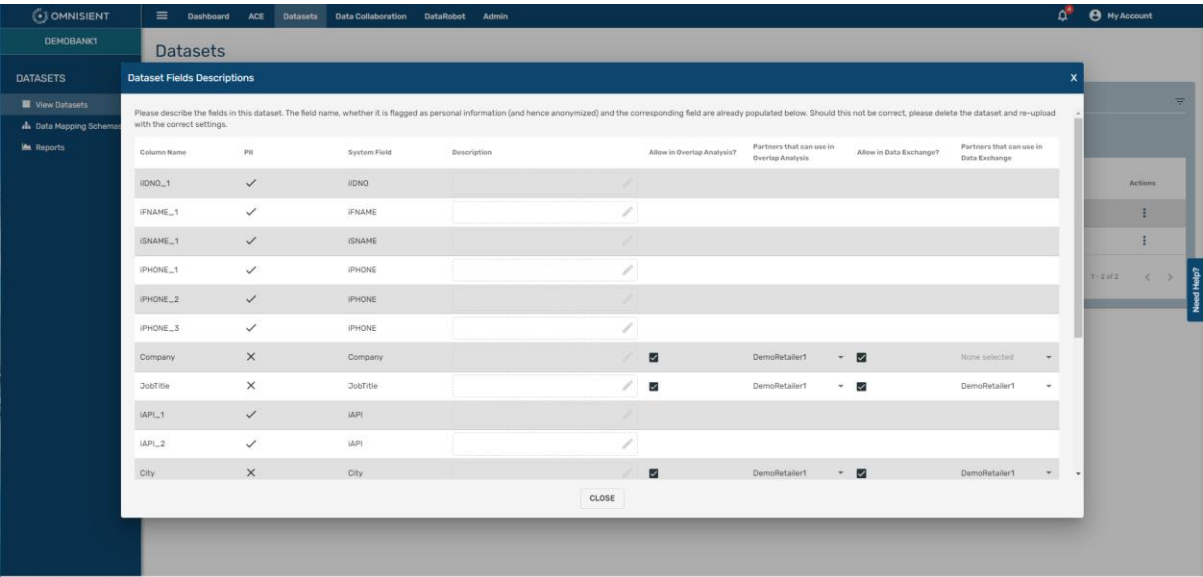
In this instance only the two companies can see each other's names in the drop down under "Businesses that can access", other companies cannot see these companies in their drop down.



Ticking the DemoRetailer1 company will now show that they can view DemoBank1's dataset called Bank1Customers.



Field-level permissions can also be set for overlaps and data exchanges by clicking on the three dots actions on the right, and selecting “Edit Fields”:



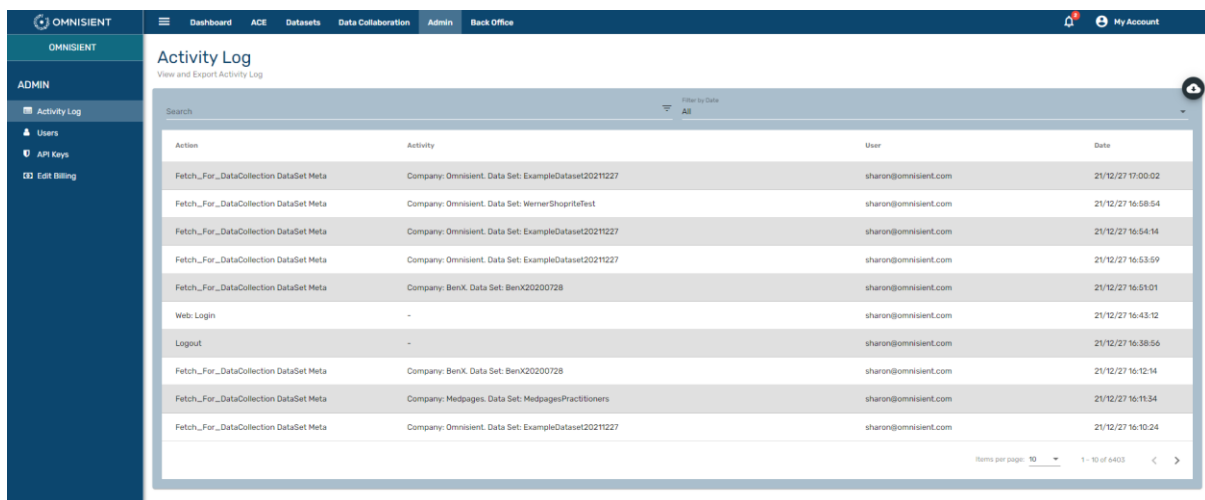
## Managing your Environment - Admin

This section allows for the management and monitoring of your datasets within the environment containing your datasets on the Omnisient Platform.

The options are to view the Activity log, manage your company's users on the platform, manage API keys for the Omnisient Server Connect upload utility, and to update your company's billing information.

### Activity Log

This module allows you to view and monitor all the activity that occurred on your client account, for all users. You can download this table to a CSV file or filter the content of the log as needed.



Action	Activity	User	Date
Fetch_For_DataCollection DataSet Meta	Company: Omnisient, Data Set: ExampleDataset20211227	sharon@omnisient.com	21/12/27 17:00:02
Fetch_For_DataCollection DataSet Meta	Company: Omnisient, Data Set: WernerShopteTest	sharon@omnisient.com	21/12/27 16:58:54
Fetch_For_DataCollection DataSet Meta	Company: Omnisient, Data Set: ExampleDataset20211227	sharon@omnisient.com	21/12/27 16:54:14
Fetch_For_DataCollection DataSet Meta	Company: Omnisient, Data Set: ExampleDataset20211227	sharon@omnisient.com	21/12/27 16:53:59
Fetch_For_DataCollection DataSet Meta	Company: BenX, Data Set: BenX20200728	sharon@omnisient.com	21/12/27 16:51:01
Web Login	-	sharon@omnisient.com	21/12/27 16:43:12
Logout	-	sharon@omnisient.com	21/12/27 16:38:56
Fetch_For_DataCollection DataSet Meta	Company: BenX, Data Set: BenX20200728	sharon@omnisient.com	21/12/27 16:12:14
Fetch_For_DataCollection DataSet Meta	Company: Medpages, Data Set: MedpagesPractitioners	sharon@omnisient.com	21/12/27 16:11:34
Fetch_For_DataCollection DataSet Meta	Company: Omnisient, Data Set: ExampleDataset20211227	sharon@omnisient.com	21/12/27 16:10:24

### Users

This module allows you to manage users in your company provided your account has been authorised as the Admin Role.

You can EDIT or DELETE existing users or create NEW USERS.

### User Roles

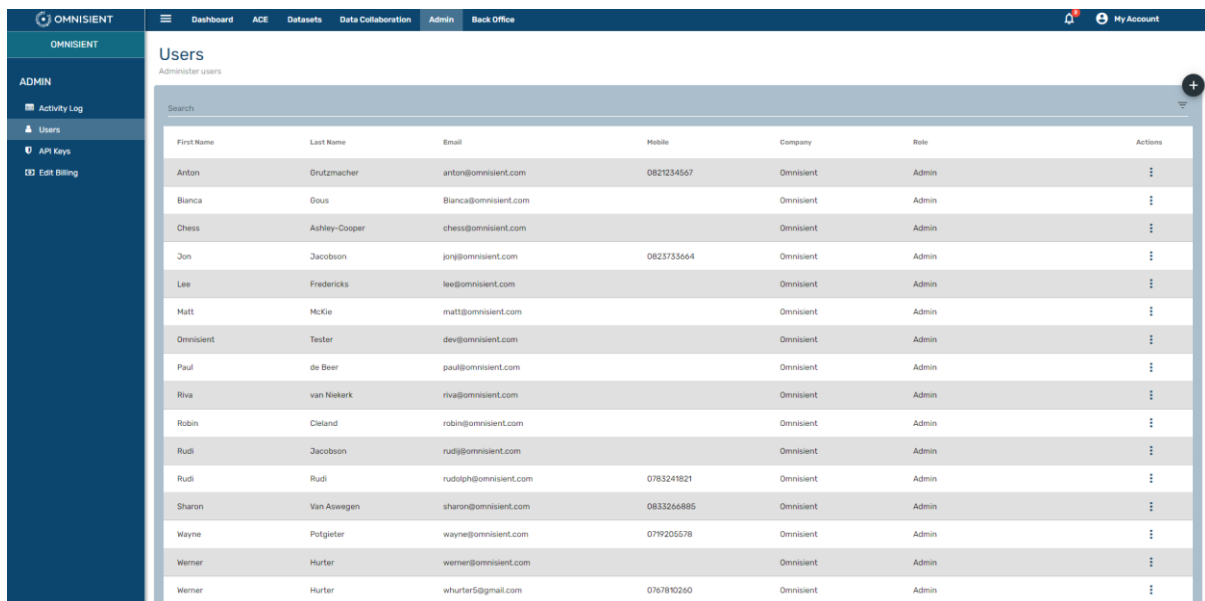
Please note the system has the following user roles:

1. Admin - has full administrative rights over the company account and can create or delete users as needed.
2. User - has full access to the system (Desktop and WebApp) but cannot create or delete users under the company account.

Any "Admin" type user on the Omnisient Web App is able to modify the profiles of "User" type users to restrict them to only the functions that they are concerned with, and because roles differ from company to company, you can configure permissions to your exact requirements.

## View users

You can see all users in the table below:

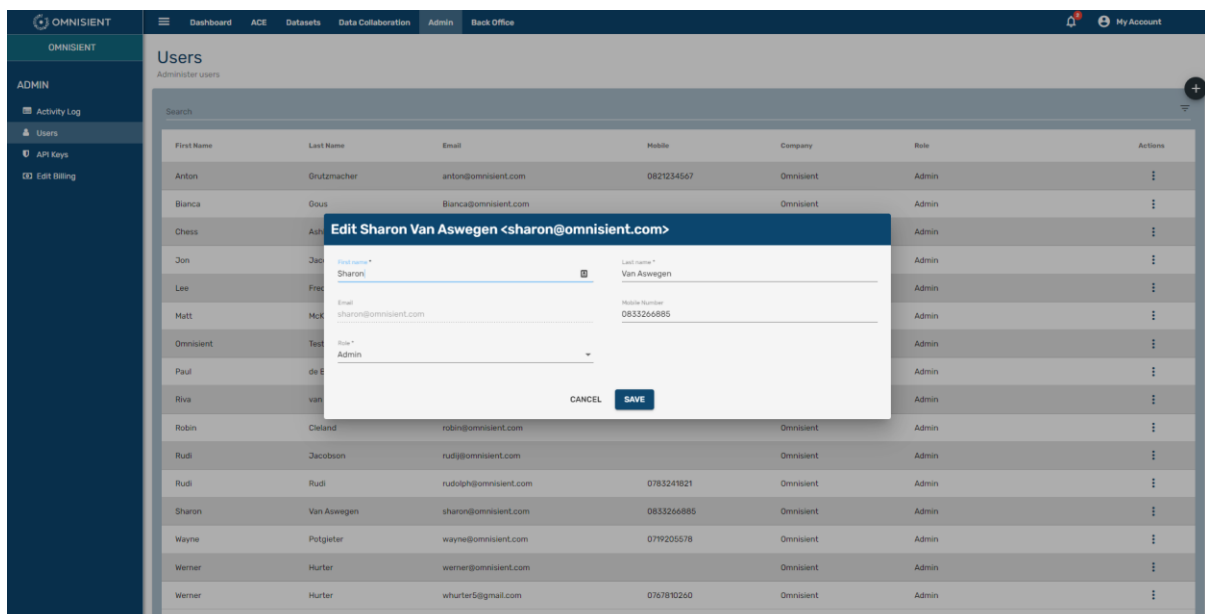


The screenshot shows the OMNISIENT Users table. The table has columns for First Name, Last Name, Email, Mobile, Company, Role, and Actions. The data is as follows:

First Name	Last Name	Email	Mobile	Company	Role	Actions
Anton	Grutzmacher	anton@omnisient.com	0821234567	Omnisient	Admin	⋮
Bianca	Gous	Bianca@omnisient.com		Omnisient	Admin	⋮
Chess	Ashley-Cooper	chess@omnisient.com		Omnisient	Admin	⋮
Jon	Jacobson	jon@omnisient.com	0823735664	Omnisient	Admin	⋮
Lee	Fredericks	lee@omnisient.com		Omnisient	Admin	⋮
Matt	McKie	matt@omnisient.com		Omnisient	Admin	⋮
Omnisient	Tester	dev@omnisient.com		Omnisient	Admin	⋮
Paul	de Beer	paul@omnisient.com		Omnisient	Admin	⋮
Riva	van Niekerk	riva@omnisient.com		Omnisient	Admin	⋮
Robin	Cleland	robin@omnisient.com		Omnisient	Admin	⋮
Rudi	Jacobson	rudi@omnisient.com		Omnisient	Admin	⋮
Rudi	Rudi	rudolph@omnisient.com	0783241821	Omnisient	Admin	⋮
Sharon	Van Aswegen	sharon@omnisient.com	0833266885	Omnisient	Admin	⋮
Wayne	Potgieter	wayne@omnisient.com	0719205578	Omnisient	Admin	⋮
Werner	Hurter	werner@omnisient.com		Omnisient	Admin	⋮
Werner	Hurter	whurter5@gmail.com	0767890260	Omnisient	Admin	⋮

## Edit users

To edit an existing user, click the edit button next to the user and change the required fields below.



The screenshot shows the OMNISIENT Users table with an edit modal open for Sharon Van Aswegen. The modal contains the following fields:

- First name: Sharon
- Last name: Van Aswegen
- Email: sharon@omnisient.com
- Mobile Number: 0833266885
- Role: Admin

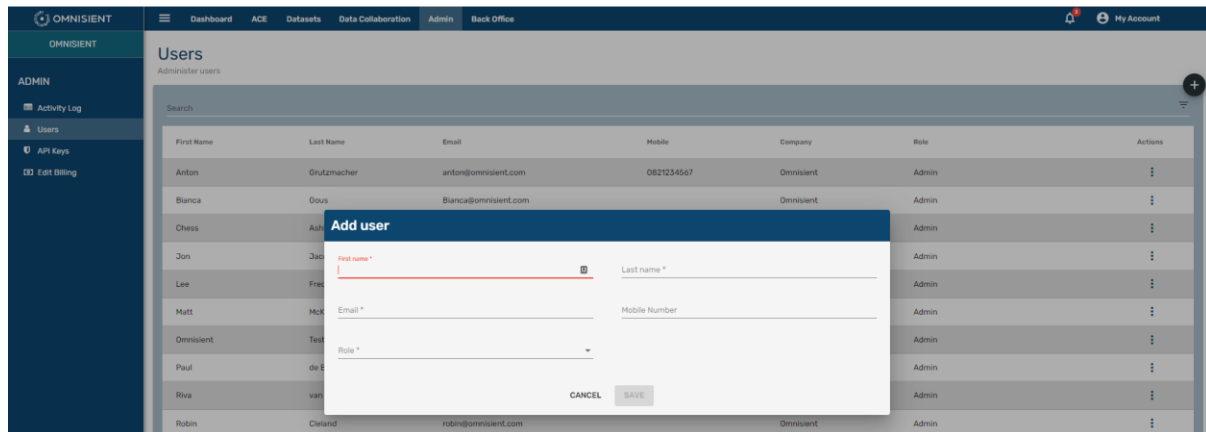
The modal also has CANCEL and SAVE buttons.

## Delete Users

To REMOVE User, click the delete button under Actions - the three dots on the far right.

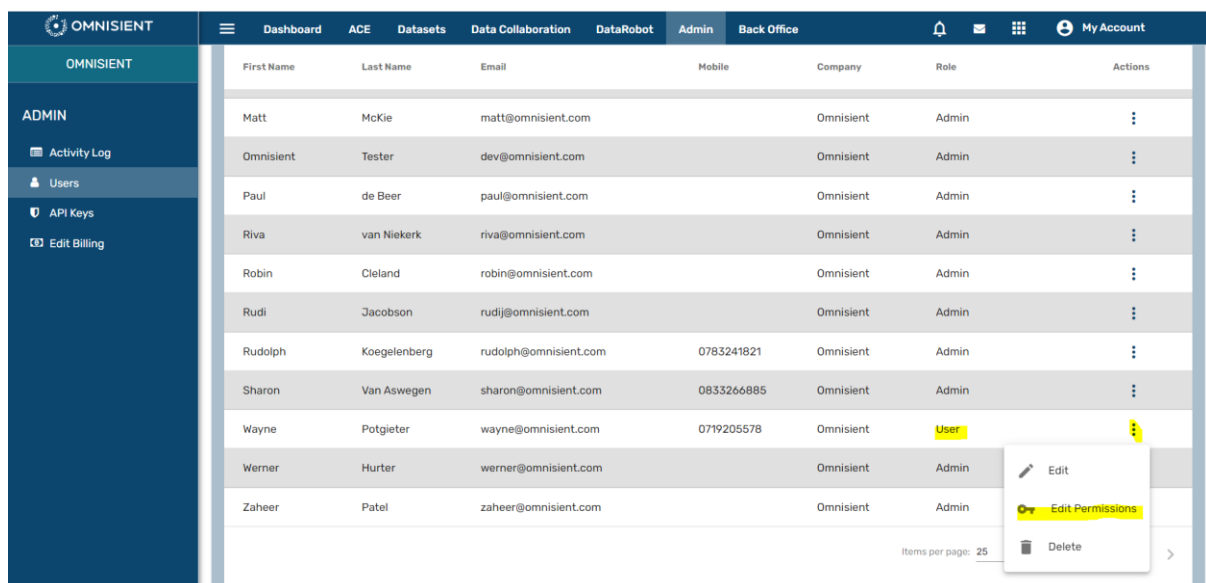
## Add Users

To ADD User, click the Add User button (+) top right, and fill out required details as below:



## Edit User Permissions (per Module)

Any "Admin" type user on the Omnient Web App can modify the profiles of "User" type users to restrict them to only the functions that they are concerned with:



Selecting "Edit Permissions" for a "User" type user, an option accessible via the three dots actions menu on the right, will present you with the page where you are able to select the required modules that this user will be allowed access to. This user will not be able to see or access any modules not selected:

OMNISIENT

ADMIN

Activity Log

Users

API Keys

Edit Billing

Dashboard

ACE

Datasets

Data Collaboration

DataRobot

Admin

Back Office

My Account

OMNISIENT

Wayne Potgieter

BACK TO USERS ADMIN

RESET TO DEFAULT

SAVE

Action	Allowed
Desktop	
<input checked="" type="checkbox"/> Desktop	<input checked="" type="checkbox"/> Access
Dashboard	
<input checked="" type="checkbox"/> Dashboard	<input checked="" type="checkbox"/> View
<input checked="" type="checkbox"/> Tenant Overlaps	<input checked="" type="checkbox"/> View
<input checked="" type="checkbox"/> Platform Stats	<input checked="" type="checkbox"/> View
ACE	
<input type="checkbox"/> Book	<input type="checkbox"/> Book
<input type="checkbox"/> View ACE Reports	<input type="checkbox"/> Delete <input type="checkbox"/> View
<input type="checkbox"/> View Selections	<input type="checkbox"/> View <input type="checkbox"/> Delete <input type="checkbox"/> Download <input type="checkbox"/> Summary
Datasets	
<input type="checkbox"/> View Selections	<input type="checkbox"/> View <input type="checkbox"/> Delete <input type="checkbox"/> Download <input type="checkbox"/> Summary
Datasets	
<input checked="" type="checkbox"/> PII Leaks	<input checked="" type="checkbox"/> Unflag PII Leak <input checked="" type="checkbox"/> Delete PII Leak <input checked="" type="checkbox"/> Fetch PII Leak <input checked="" type="checkbox"/> Fetch PII Leaks
<input checked="" type="checkbox"/> View Datasets	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit Fields <input checked="" type="checkbox"/> Preview <input checked="" type="checkbox"/> Share Dataset <input checked="" type="checkbox"/> Delete
<input checked="" type="checkbox"/> Data Mapping Schemas	<input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Delete
<input checked="" type="checkbox"/> Reports	<input checked="" type="checkbox"/> View Report <input checked="" type="checkbox"/> View
Data Collaboration	
<input type="checkbox"/> Book Exchange	<input type="checkbox"/> Book
<input checked="" type="checkbox"/> Book Overlap	<input checked="" type="checkbox"/> Book
<input checked="" type="checkbox"/> View Overlaps	<input checked="" type="checkbox"/> View Report <input checked="" type="checkbox"/> Summary <input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Delete
<input type="checkbox"/> View Exchanges	<input type="checkbox"/> Delete <input type="checkbox"/> Download <input type="checkbox"/> View
<input type="checkbox"/> Private Collaborations	<input type="checkbox"/> Redeem Invite <input type="checkbox"/> Add <input type="checkbox"/> Delete Collaboration <input type="checkbox"/> View <input type="checkbox"/> Delete Invite
DataRobot	
<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> View

Clicking “Reset to Default” will reset all the permissions to the default User Permissions. Clicking “Save” will save the user’s new permissions.



## ACE – Anonymised Campaign Engine

### ACE Overview

The Omnisient Anonymised Campaign Engine (ACE) transforms the way our clients can evaluate and execute partnerships.

ACE enables the evaluation of the beneficial value and synergy of a potential partner, via our full “universe” of data including credit bureau data, deeds information, CIPC & Home Affairs information, and marketing data which can act as a common denominator to understand for instance the demographics, affluence, and life stage of customers across both data-sharing parties, making analysis and campaign execution significantly more powerful.

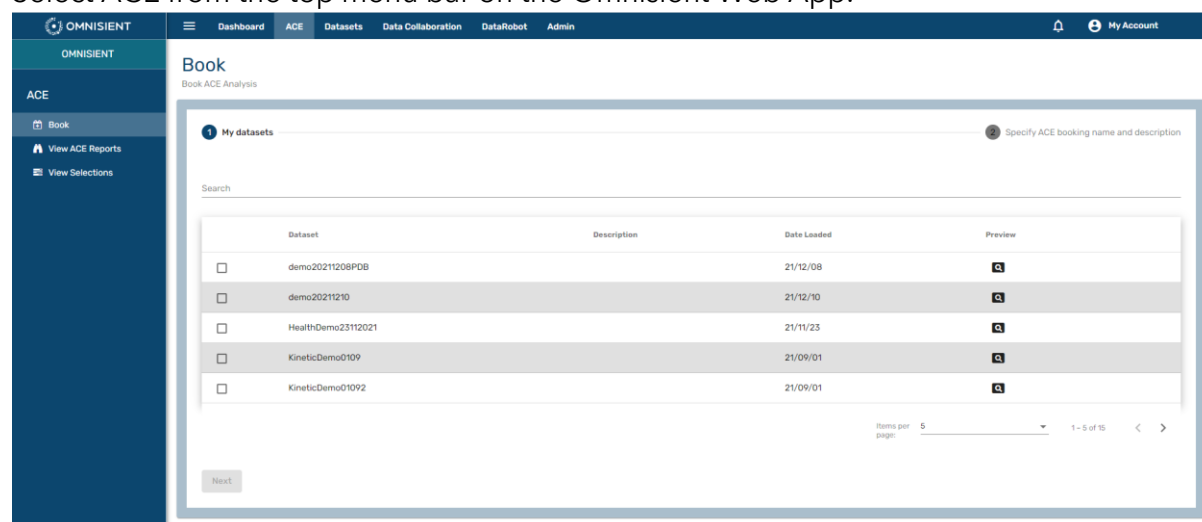
Without the Omnisient Platform, if the evaluation and assessment of a potential partnership leads to a decision to execute campaigns, both parties would be forced to exchange datasets in order to market to the other’s base or to share insights.

The Omnisient Platform eliminates this need and enriches the data with ACE insights to enable targeted campaign execution. The platform provides all the benefits of joint campaign planning and execution without having to share data physically with the other party.

The Omnisient Platform provides privacy, insights, and targeting capabilities.

### Navigate to ACE

Select ACE from the top menu bar on the Omnisient Web App:



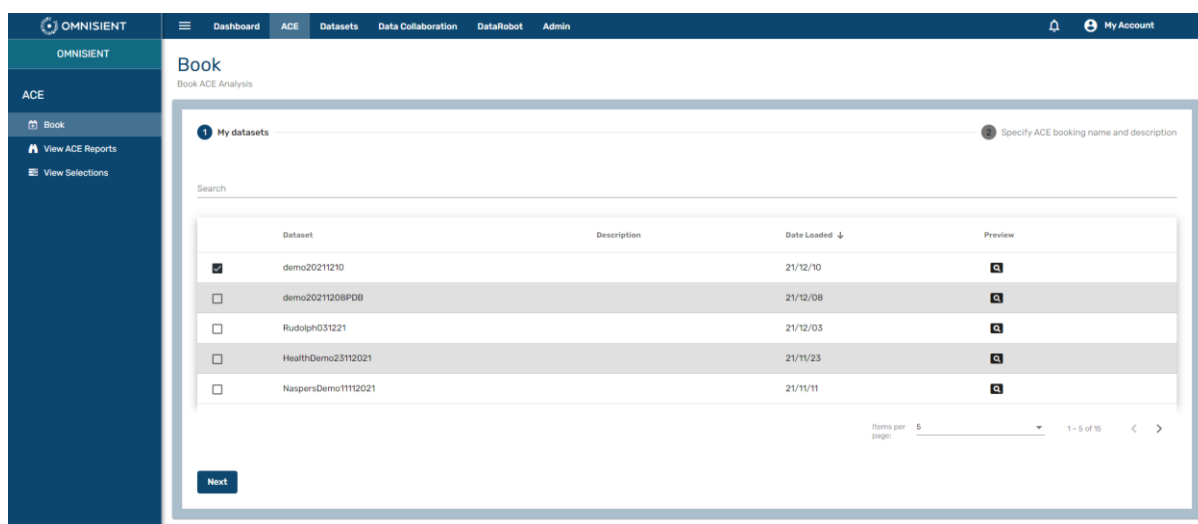
ACE reports are generated on request, so you need to book an ACE report through your Account Manager, either in person, or by booking an ACE report here on the system.

### Book an ACE Report

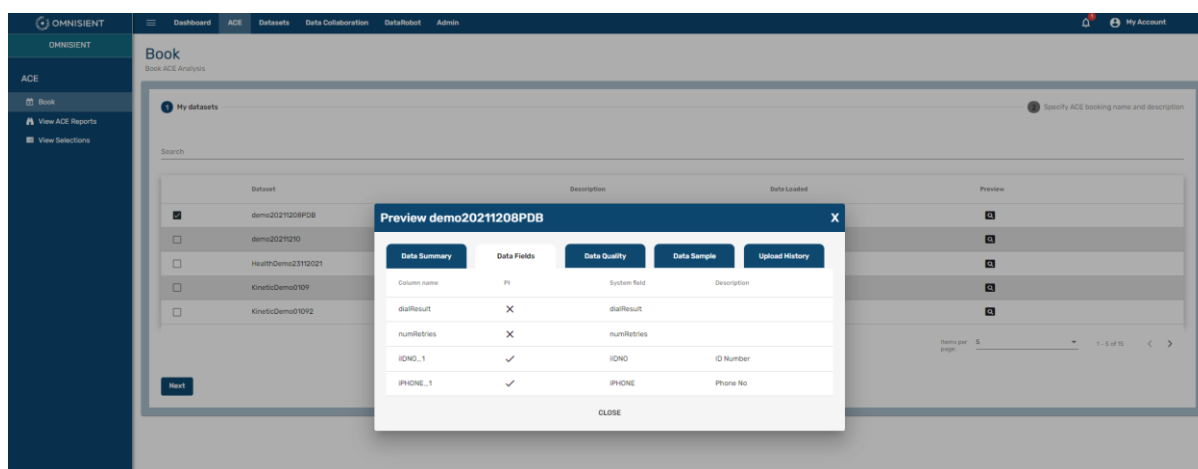
The booking of an ACE Report is a request to the system to compare your dataset to the ACE “universe” of data which contains credit bureau data, deeds information, CIPC & Home Affairs information, and other marketing data, and to prepare a report with various pages of analyses and insights of your dataset(s)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

To book a report, select BOOK from the sidebar menu:

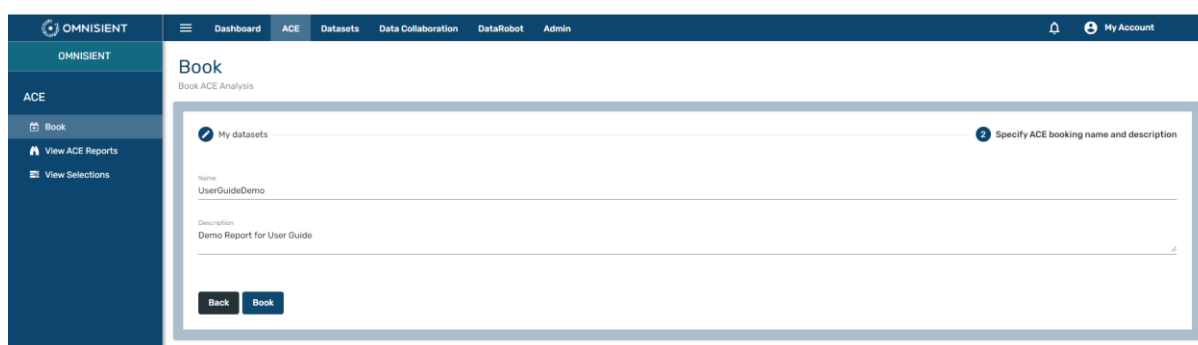
You will now be guided through a two-step process. First, select the dataset for which you would like to book an ACE report:



You can preview the data should you want to ensure that the required data fields are present in the dataset:



If you are happy, click "Next" and pick a name and description for your booking:

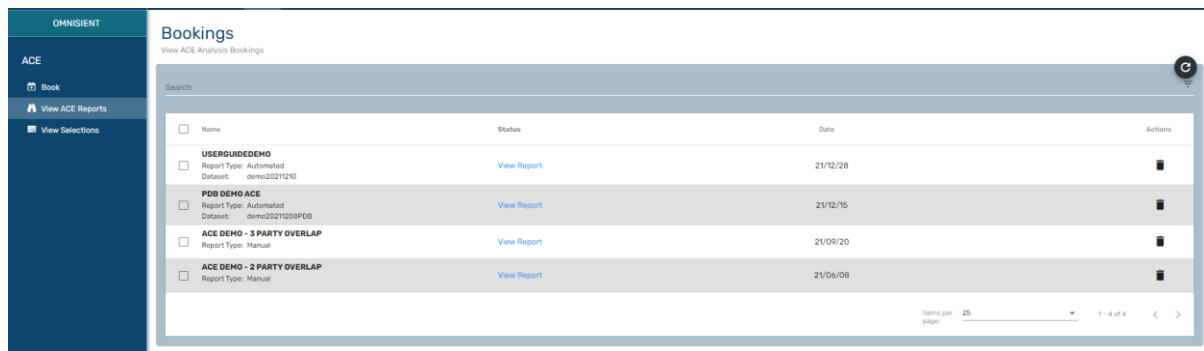


Click "Book".

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 report is delivered on the platform.

## View ACE Reports

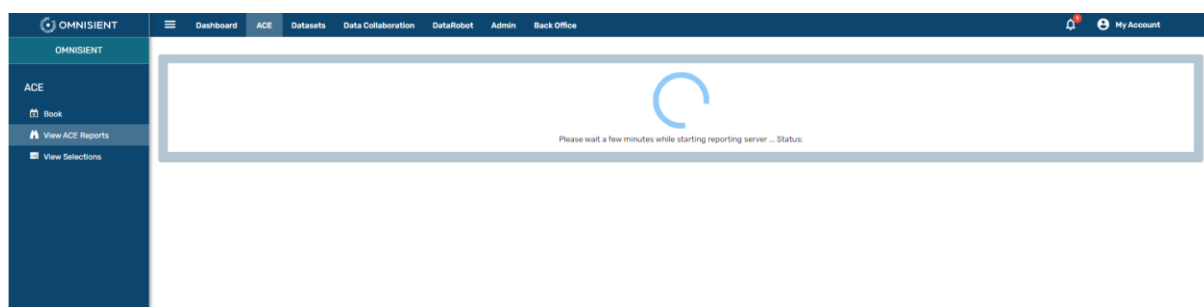
On this page you will see a list of the ACE reports that you or somebody else in your company has booked. The Omnisient team will be notified of any ACE Booking request, and once they have approved your booking, the report status of your ACE Report request will be changed from "Awaiting Approval" to "Queued", while it is busy being prepared. As soon as the report is ready, the status will change to "Completed". You will receive an email to inform you that it has been approved. You can view a report from here, and you also have the option to delete a report by selecting it and clicking the delete icon on the right:



Name	Status	Date	Actions
<input type="checkbox"/> USERGUIDEDDEMO Report Type: Automated Dataset: demo20211210	<a href="#">View Report</a>	21/12/28	
<input type="checkbox"/> PDB DEMO ACE Report Type: Automated Dataset: demo20211210(PDB)	<a href="#">View Report</a>	21/12/15	
<input type="checkbox"/> ACE DEMO - 3 PARTY OVERLAP Report Type: Manual	<a href="#">View Report</a>	21/09/20	
<input type="checkbox"/> ACE DEMO - 2 PARTY OVERLAP Report Type: Manual	<a href="#">View Report</a>	21/06/08	

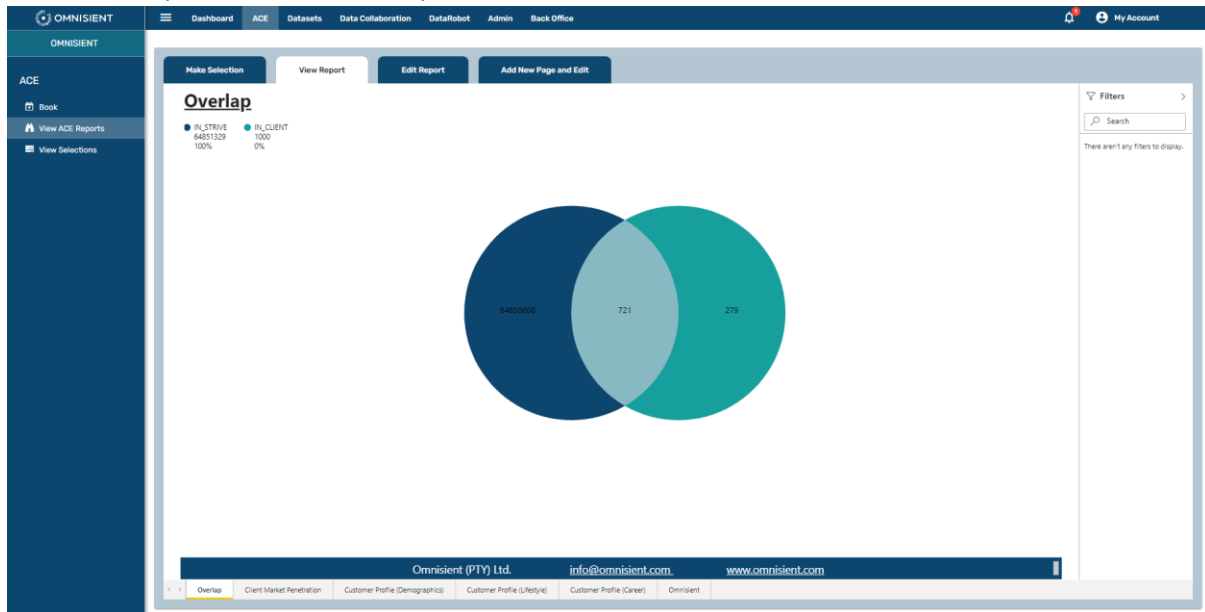
## View Report Detail

Click on View Report option to view your report. The Report Server will be started first but please note that it may take a few minutes - this is the screen you will see while it is loading:



The first page you will see after clicking View Report, will be the Overlap tab (note the other tabs at the bottom of the page), showing a Venn diagram of the overlap between the Strive Universe and your dataset.

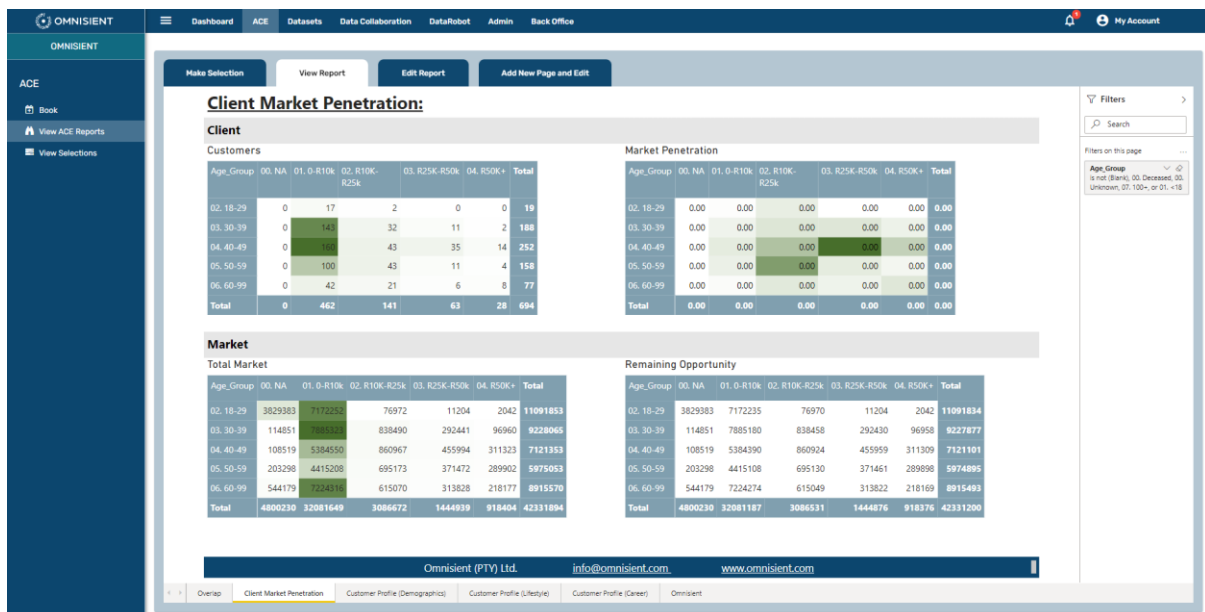
## ACE View Report: Tab 1 – Overlap



Note the tabs at the bottom of the screen. For this particular report five tabs or pages are available. The first tab is the Overlap (shown above). The following four screens show the content of the remaining tabs. 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.

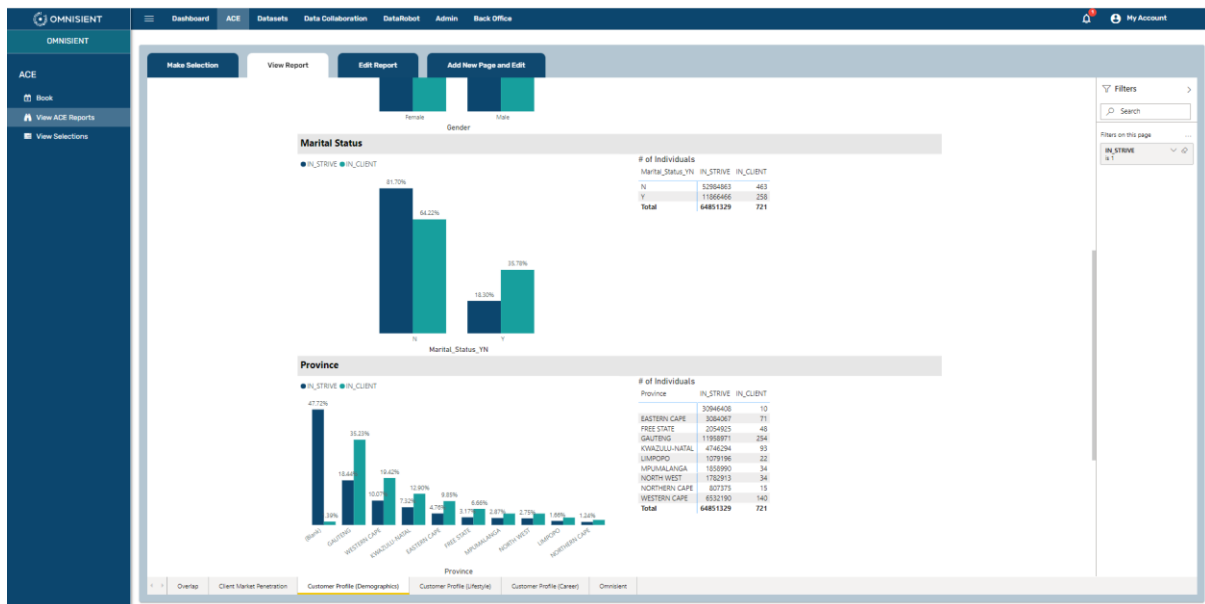
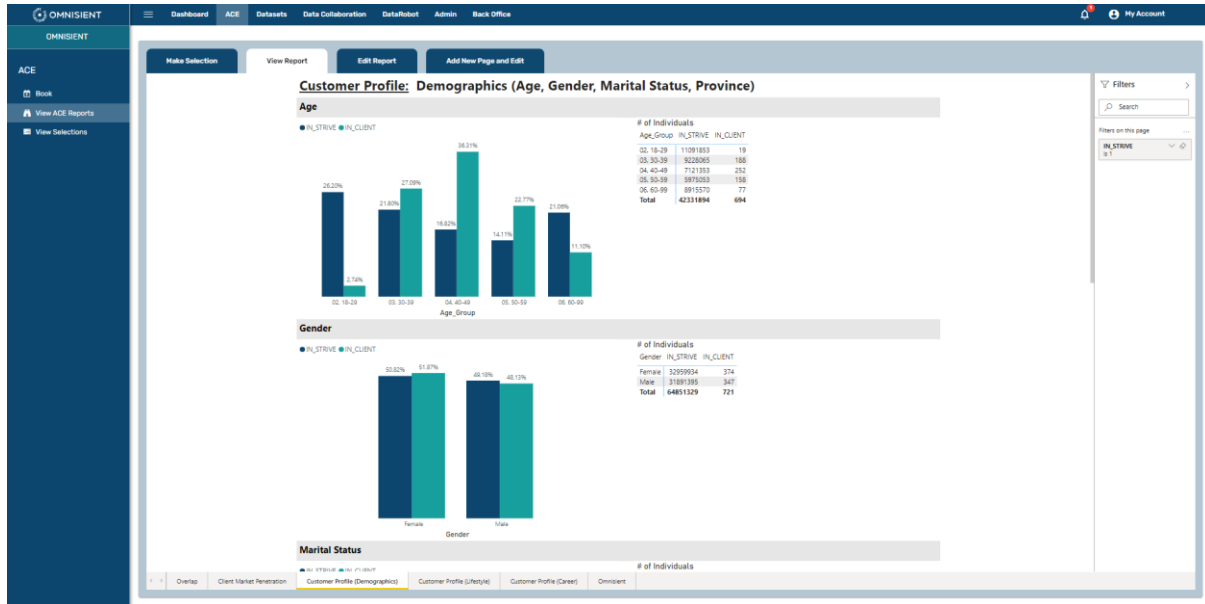
## ACE View Report: Tab 2 - Client Market Penetration

The view on Tab 2 is a graphic of the current market penetration against the Strive Universe, as well as the remaining opportunity that exists within predefined Age and Income brackets:



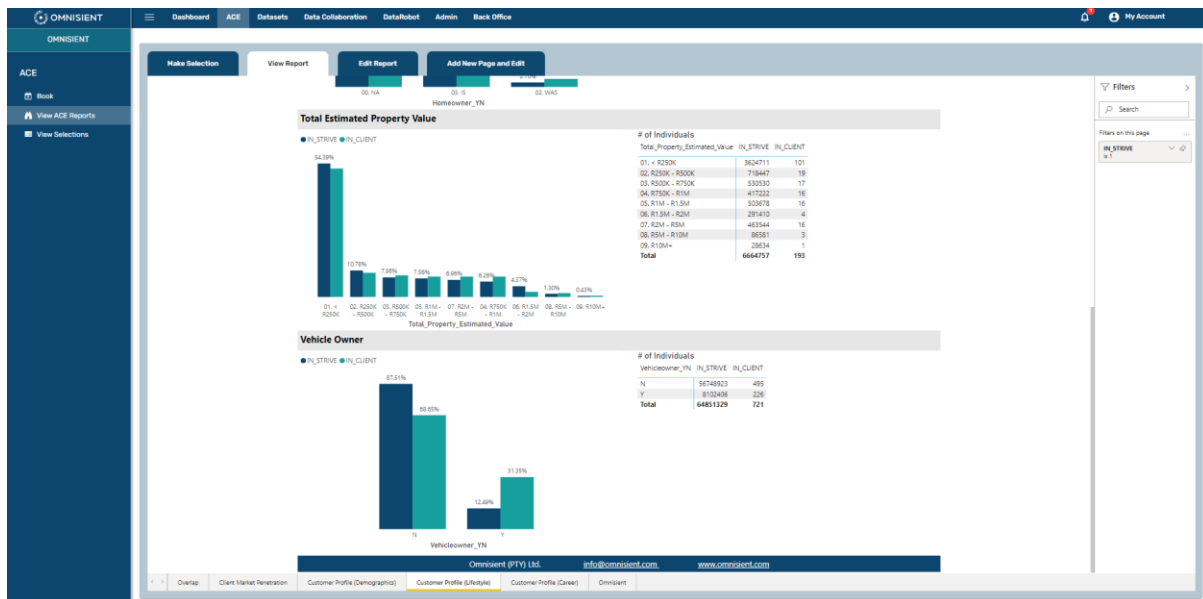
### ACE View Report: Tab 3 - Customer Profile (Demographics)

Scroll up and down on this page to see analyses on Age, Gender, Marital Status, Province and Parental Status against the Strive Universe:



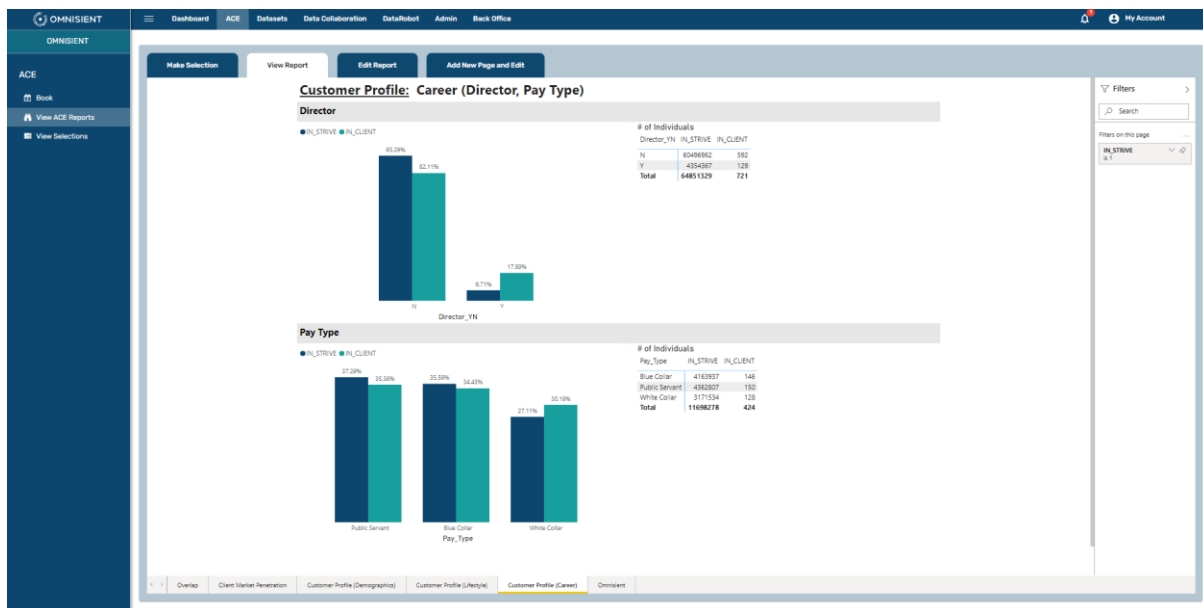
## ACE View Report: Tab 4 - Customer Profile (Lifestyle)

This tab shows property value and vehicle ownership compared to the Strive Universe.



## ACE View Report: Tab 5 - Customer Profile (Career)

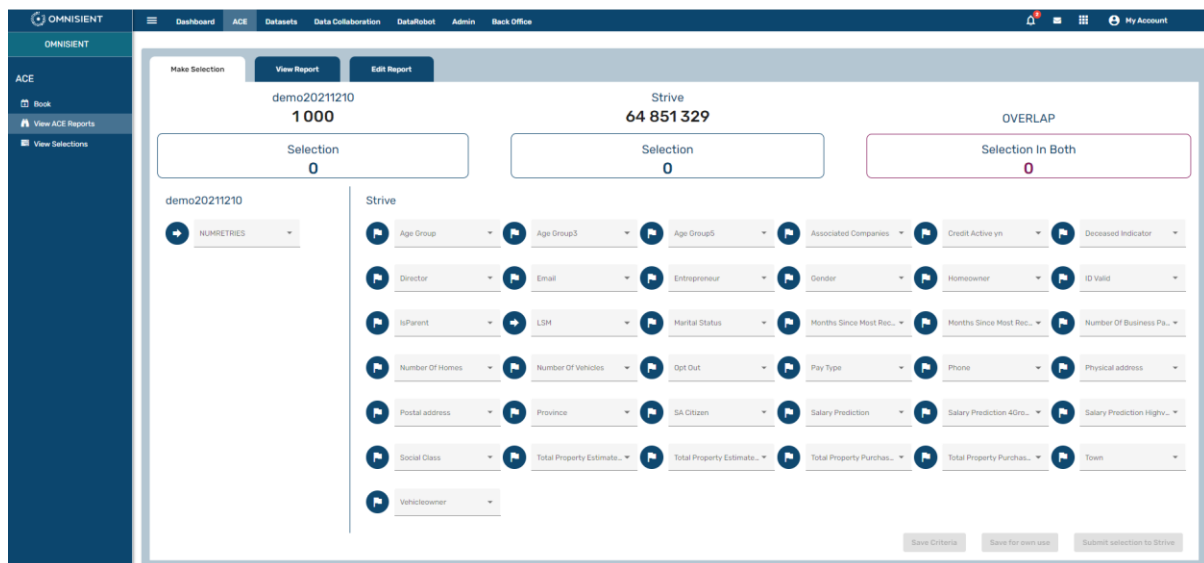
The view on Tab 5 shows graphs on Directorship and Pay Type (Blue Collar, White Collar or Government Employee):



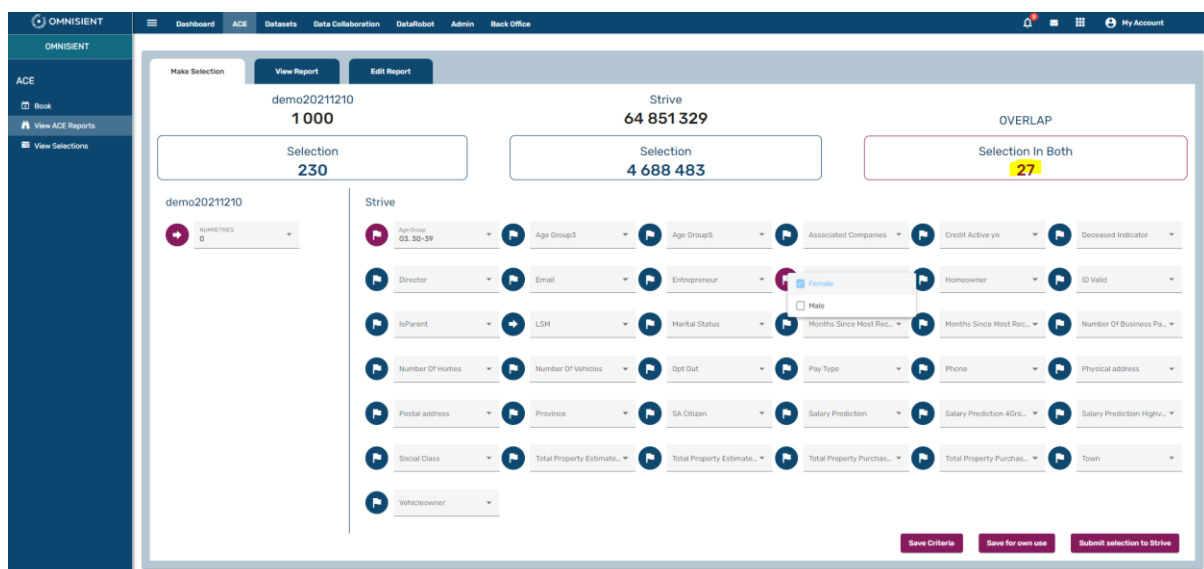
## ACE - Make Selection

This module allows you make your own selections to narrow down a specific audience of individuals, and then either save and export them for your own use or submit them to Strive for the execution of a campaign on your behalf.

This is a view of the Selection page before any selections have been made. To the left of the grey vertical line are the selectable criteria contained in the client dataset (demo20211210) and to the right, the Strive criteria that can be applied to the data to narrow down a selection:



Below is a view of the page after a selection has been made of "Numretries" equal to 0 (from the client database), and for all females aged between 18 and 39 (Strive information). There are 27 such individuals:



The three buttons at the bottom right indicate that there are three actions that can be taken after selecting a result set:

- **Save Criteria:** The selection criteria may be saved so that they can be recalled and re-applied quickly. This is especially useful when complex criteria have to be tweaked slightly after the results have been examined.
- **Save for own use:** ACE Reports provide deeper insights for the South African consumer base. The selection may be saved for subsequent download into your own environment, for use, such as executing a campaign, by your own company using your own contact details and opt-in permissions. This is normally used if you do not have deep insights into your customer base, but you do have consent and contact details to contact your customers
- **Submit selection to Strive:** You can submit the selection to Strive, who could execute the campaign on your behalf. This is useful if you do not have contact details or consent for the selected segment of individuals in which case Strive may be able to execute campaigns on your behalf.

### Save Criteria

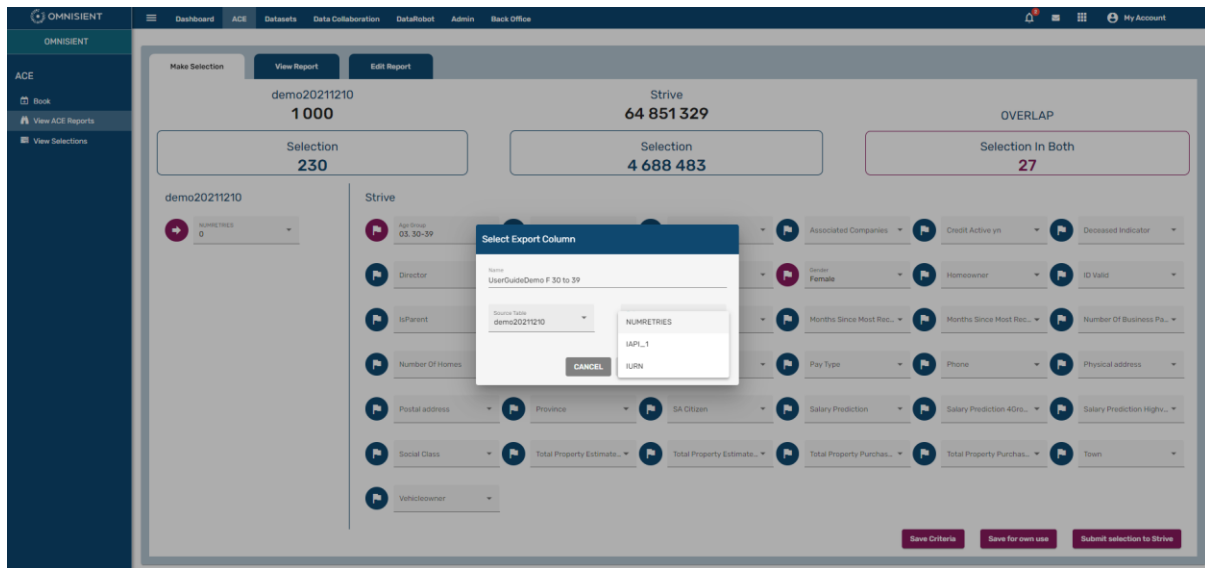
After making your selections and you click "Save Criteria", you will be prompted for a name for the selection criteria, and it will be saved. You can retrieve the saved criteria on the "View Selections" page:

Name	Export Column Name	Selection Total	% Strive Selection	Date	Status	Actions
UserGuideDemo Criteria		27	✗	22/04/21	Saved Criteria	
ACE Demo - 3 Party Overlap	iURN	29 314	✗	22/05/16	Completed	View Summary
Sharon Test	iURN	817	✗	22/01/05	Awaiting Approval	Refresh Selection
DemoSelection for User Guide	iURN	31	✗	21/12/29	Completed	Delete Selection
Bivash	StriveURN	180 012	✓	21/09/20	Completed	
Strive Demo Selection	StriveURN	761 197	✓	21/08/31	Completed	

### ACE Selection - Save for Own Use

After you have made your selection, click "Save for own use". You will be prompted for a name of the selection, the source table you are exporting from, and a column name. This column will be used as a unique identifier for each record. If you have uploaded your own identifier, pick it from the drop-down list, otherwise pick the iURN column, the Omniscient generated token which will be used in our extract utility. You can use this file to match against the file your local \*.intersect file, which you've saved when uploading the dataset:

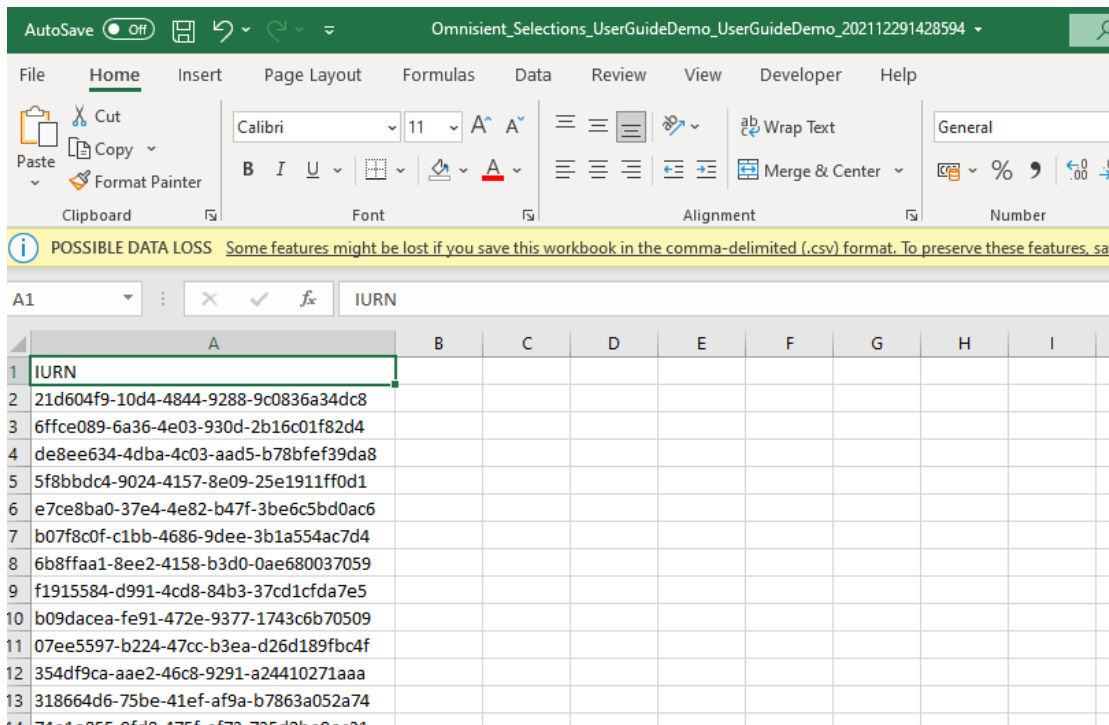




Your selection will now be listed under the “View Selections” sidebar menu item, and after it has been approved by the Omnisient Admin team, it will have a status of “Completed” and be available for download:

Selections						
View ACE Selections						
Search						
Name	Export Column Name	Selection Total	Is Strive Selection	Date	Status	Actions
Sharon Test	IURN	817	✗	22/01/03	Awaiting Approval	⋮
UserGuideDemo Criteria	IURN	27	✗	22/04/21	Saved Criteria	⋮
ACE Demo - 3 Party Overlap	IURN	28 314	✗	22/03/16	Completed	⋮
Strive Demo Selection	StriveIURN	761 997	✓	21/08/31	Completed	⋮
Bhavan	StriveIURN	180 012	✓	21/09/20	Completed	⋮
DemoSelection for User Guide	IURN	31	✗	21/12/29	Completed	⋮

Clicking “Download Selection” will download the iURNs into a CSV File which can be used to match-back to your \*.intersect file which you saved during the upload process. You can now use your own routines to match the downloaded iURNs below back to the original upload file, or you can use the Omnisient Extract Tool. This is what the downloaded file will look like:

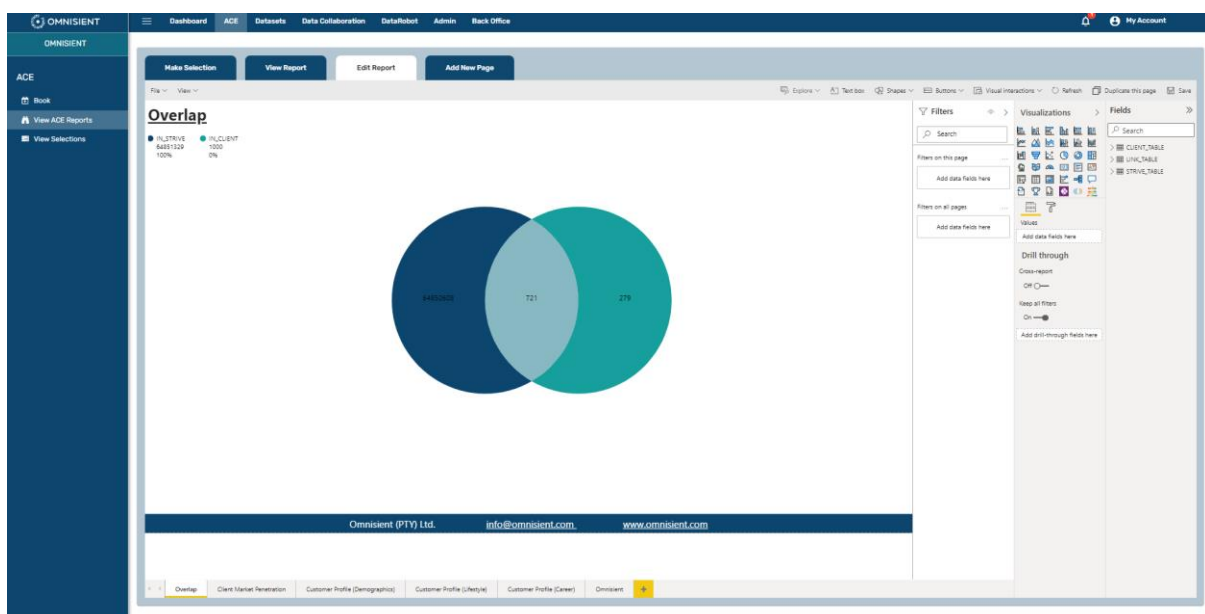


### ACE Selection – Submit Selection to Strive

When choosing the "Submit Selection to Strive" after you have made your selection, Strive will receive the StriveID for your selection and will be able to execute campaigns on your behalf. Strive will not be able to see any of your data, this process merely identifies a set of campaign recipients. Please contact your Account Manager to facilitate this process, including the campaign content, channels, modalities, and fees.

### ACE – Edit Report

Selecting the Edit Report tab allows you to change the parameters on the right – filters, visualisation and fields.



### ACE – Add New Page

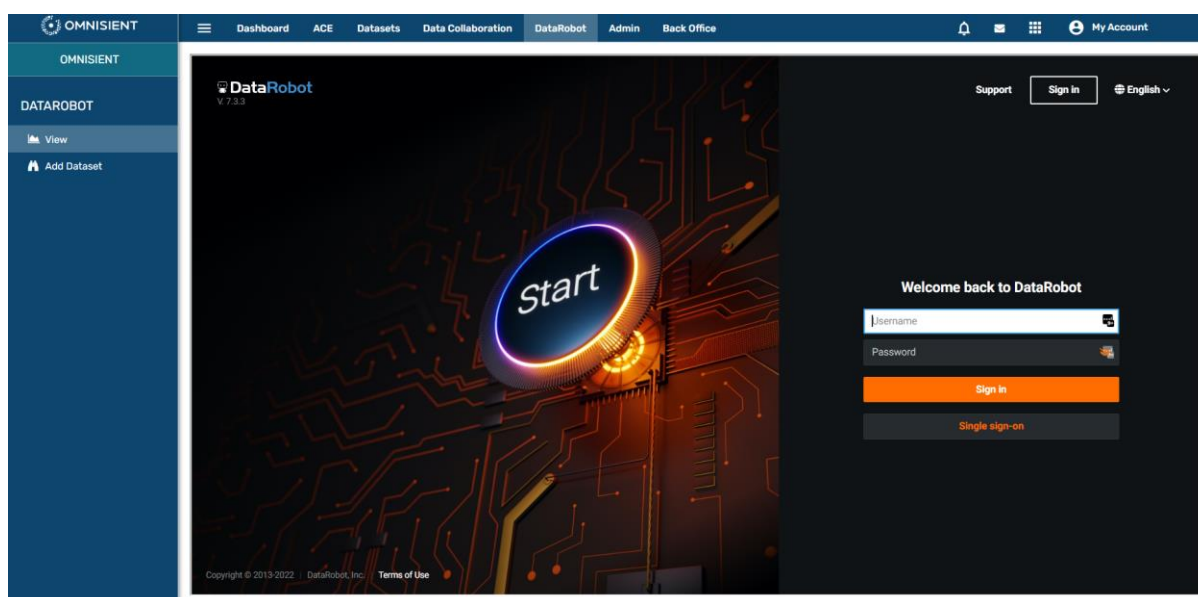
This will add a new Tab at the bottom of the page, where you will be able to design your own report using your dataset against the Strive data. For further information or assistance please contact [Support](#).

# DataRobot – Automated Machine Learning

## DataRobot Overview

DataRobot enables business analysts to build predictive analytics with no knowledge of Machine Learning (ML) or programming. It uses automated ML to build and deploy accurate predictive models in a short span of time. DataRobot's automated Machine Learning platform together with the Omnisient platform gives data scientists the ability to rapidly evaluate and access previously untapped Alternative Data sources.

DataRobot can be accessed from the top menu within the Omnisient Web App:



Please contact [support@omnisient.com](mailto:support@omnisient.com) for a demonstration or further information

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