

## **Introducing the Management Console**

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# Introducing the Management and Governance Console

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The Management and Governance Console is a web-based interface for configuring and monitoring PHEMI Central.



**Note:** Use either Apple Safari, Mozilla Firefox or Google Chrome to access the PHEMI Central Management and Governance Console. Microsoft Internet Explorer is not supported.

## Logging On to the Management and Governance Console

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The URL for the PHEMI Central Management and Governance Console is configured during physical installation of PHEMI Central. Your PHEMI representative will provide you with the URL.

To access the PHEMI Central Management and Governance Console:

1. In the address bar of the browser, enter the URL configured for the PHEMI Central Management and Governance Console.

The PHEMI Central login screen appears.

2. Enter your user name and password. Click **Login**.

The PHEMI Central Management and Governance Console launches. The Management and Governance Console initially opens on the Data Sources page. Subsequently, the system remembers the last page you viewed and opens on that page.

## Quick Tour of the Management and Governance Console

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The Management and Governance Console consists of a set of main pages. Each main page includes screens where you can perform a set of related functions.

Note that your user role determines what part of the PHEMI Central Management and Governance Console you can access. Different roles have access to different parts of the Management and Governance Console.

Note that Privacy Officers do not have any functional capabilities in the Management and Governance Console. However, you must configure at least one Privacy Officer in order to be able to define data sources.

**Table 1:**

Page	What you can do there	You must be a:
 Data Sources	Manage data sources; manually ingest files; schedule file ingest.	PHEMI Administrator
 Datasets	Build datasets; execute datasets; export datasets.	PHEMI Administrator to define datasets. Data Analyst to execute and export datasets.
 Access Policy Builder	Define access policies.	PHEMI Administrator
 System Metrics	View metrics about data sources, system performance, and tasks.	PHEMI Administrator
 Users	Manage PHEMI Central users.	PHEMI Administrator
 System Maintenance	Run system tests.	PHEMI Administrator
 Object Browser	View or delete individual files stored in PHEMI Central.	PHEMI Administrator
 Audit log	Monitor what operations have been performed from and what requests have been made to PHEMI Central.	PHEMI Administrator

## Initial Configuration Workflow

Since some configuration tasks must be completed before others can be performed, PHEMI Administrators can use this workflow to configure PHEMI Central.

In these first steps, order matters. You cannot create users until you have defined user authorizations. Likewise, you cannot create access policies without defining both user authorizations and data visibilities.

1. Log on to the PHEMI Central Management and Governance Console.
2. Define user authorizations.
3. Create users. Create at least one PHEMI Administrator, at least one privacy officer, and at least one data analyst.
4. Define data visibilities.

Data categories must be added before you can define data sources. Access policies are optional for data source configuration. If you are using a Data Processing Function (DPF) to create derived data from raw data, you upload the DPF archive as part of data source configuration.

5. Add data categories.
6. Create access policies.
7. Define data sources.

In general, it is the data analyst, not the PHEMI Administrator, who builds and executes datasets. However, configuring dataset destinations is part of system configuration.

8. Configure dataset destinations.