

# **Administrator Quick Start**

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# Before You Configure

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Before you start configuring PHEMI Central, the system must be installed and you should have your organization's governance policy clearly defined.

## System Installation

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PHEMI Central may be shipped as an appliance, deployed on Amazon Web Services (AWS), or deployed on your organization's VMware environment. Regardless of the deployment type, will install and set up the base system of cluster nodes with a management node and will install the PHEMI Central software on the cluster. Installation may include populating your system with some of your organization's pre-existing data.

PHEMI Professional Services will create an administrator account for you on PHEMI Central, and will provide you with the user name and password for the account, together with the URL of the PHEMI Central Management and Governance Console. At that point, you can log on to the Management and Governance Console.

## Define a Governance Policy

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Make sure your organization's governance policy is defined before you begin configuration.

Your governance policies will drive how you configure PHEMI Central. Therefore, before configuring PHEMI Central, you should make sure you have your organization's governance policy available to you. If you are uncertain as to the appropriate data visibilities, user authorizations, or access policies to define for your organization, consult with your Information Officer, Privacy Officer, or with someone in a comparable role.

To define your organization's governance policy:

1. Identify the different sensitivity levels of the data you will be storing in PHEMI Central.

In PHEMI Central, these sensitivity levels are called data visibilities, and are used to tag ingested data for purposes of privacy and access control. Examples of data visibilities are "CONFIDENTIAL," "SECRET," or "PII" (Personally Identifiable Information).

2. Identify what authorizations your organization assigns to different users to allow them to access data.

Your user authorizations should reflect the actual permissions your personnel are granted to interact with data of different visibility.

3. Specify the allowed combinations of user authorizations and data visibilities.

For example, a user with C\_LEVEL authorization (perhaps a CEO, CIO, COO, or CTO) might be permitted to access CONFIDENTIAL data, a user with RESEARCH authorization might only be permitted to access only DE-IDENTIFIED data, and a user with DOCTOR authorization might be allowed to see data of all sensitivity. In PHEMI Central, the allowed access combinations are implemented as access policies.

# Initial Configuration Workflow

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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 user with a role of PHEMI Administrator, at least one user with a role of Privacy Officer, and at least one user with a role of 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, but if you are using access policies, you must configure the policies before configuring the data sources.

If you are using a Data Processing Function (DPF) to generate derived data from raw data, you must prepare the DPF code archive before configuring the data source and upload the DPF archive during data source configuration.

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

It is the Data Analyst, not the PHEMI Administrator, who executes and exports datasets. However, constructing datasets from available data elements and configuring dataset export destinations is part of system configuration, and these tasks are performed by the PHEMI Administrator.

8. *Build datasets.*
9. *Configure dataset destinations.*