

Oracle® Trading Community Architecture Third Party Data Integration

User Guide

Release 11*i*

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Contents

Send Us Your Comments	vii
Preface.....	ix
Documentation Accessibility	xi
Online Documentation	xii
Related Guides	xii
Guides Related to All Products	xiii
Guides Related to This Product	xiii
Other Implementation Documentation	xv
1 Overview	
Introduction	1-2
Major Features.....	1-3
2 Setup	
Setting Up Third Party Data Integration.....	2-2
Integrating with D&B	2-3
Party Profile Entities Setup.....	2-5
Attribute Groups	2-6
Setting Up Data Sources	2-8
Setting Up User Overwrite Rules.....	2-12
Setting Up the Third Party Overwrite Rule.....	2-16
Party Profile Entities Setup Example.....	2-20
Attribute Groups Setup Example.....	2-24

Other Entities Setup	2-27
Address Entity and Tax Location Validation	2-28
Setting Up Data Sources	2-29
Setting Up User Data Creation Rules.....	2-32
Other Entities Setup Example	2-35
Third Party Data Integration Update Program	2-36
Prerequisite	2-36
Program Parameters	2-37

3 D&B Overview

Introduction	3-2
D&B Contract	3-2
Data Products	3-3
Business Verification	3-3
Quick Check	3-4
Delinquency Score	3-4
Global Failure Risk Score	3-4
Financial Standing	3-4
Decision Support	3-5
Enterprise Management	3-5
Commercial Credit Score (USA) Data Product	3-5
Business Information Report (BIR)	3-6
Data Elements	3-7

4 Purchasing D&B Information

Online Purchasing	4-2
Process Overview	4-2
Searching for Existing Parties in the TCA Registry	4-4
Searching for Businesses in the D&B Database	4-6
Purchasing D&B Information	4-8
Copying D&B Information from a Party.....	4-11
Requesting a D&B Investigation for a Party	4-12
Purchasing D&B Information from the Customers Workbench.....	4-15
Batch Loading	4-16
Process Overview	4-16

Generate Request List for D&B Batch Load.....	4-17
Program Parameters	4-18
Transferring a Request List File to D&B.....	4-19
Load D&B Data.....	4-20
Prerequisites	4-20
Program Parameter	4-20
Mapping of D&B Data Elements.....	4-21
DUNS Number is the Same as the Related DUNS Number	4-21
DUNS Number and Enquiry DUNS Number	4-21
Mapping API Utility	4-22
Correcting Mapping API Utility Errors	4-22

5 Reviewing Third Party Data Integration Information

Viewing Information from Data Sources	5-2
Subtabs of Information	5-3
User-Entered Information	5-4
D&B Information	5-5
Comparison Information	5-7
Duplicate DUNS Report	5-8
Report Parameters	5-8
DNB Global Data Products Request Report	5-9
Report Parameters	5-9

A Profile Options

Profile Options	A-2
Profile Options in Third Party Data Integration	A-2
Profile Option Access and Defaults	A-4

B D&B Data Elements List

Overview	B-2
General Data Elements	B-3
Financial Data Elements	B-17

C Rationalized Legacy Data

Loading Rationalized Legacy Data.....	C-2
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Index

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Preface

Welcome to Release 11*i* of the *Oracle Trading Community Architecture Third Party Data Integration User Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Trading Community Architecture Third Party Data Integration

If you have never used Oracle Trading Community Architecture Third Party Data Integration, Oracle suggests you attend one or more of the Oracle Applications training classes available through Oracle University.

- The Oracle Applications graphical user interface.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

The *Oracle Trading Community Architecture Third Party Data Integration User Guide* contains the information you need to understand and use Oracle Trading Community Architecture Third Party Data Integration. This user guide includes:

- Chapter 1 provides an overview of Oracle Trading Community Architecture Third Party Data Integration.
- Chapter 2 describes setting up Oracle Trading Community Architecture Third Party Data Integration.
- Chapter 3 provides an overview of how D&B information complements Oracle's Trading Community Architecture.
- Chapter 4 describes the online purchase and retrieval of D&B information, as well as how a batch process can be used to purchase, retrieve, and load D&B information.
- Chapter 5 describes reviewing information from different data sources for any given party, as well as reports that you can run for more information about the D&B data you have acquired.
- Appendix A describes the profile options available with this application.
- Appendix B provides definitions of the data elements included in the D&B data products.
- Appendix C describes how to load legacy data into the TCA registry after the data has been rationalized by D&B.

Documentation Accessibility

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Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Trading Community Architecture Third Party Data Integration.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **Online Help** - Online help patches are available on MetaLink.
- **11*i* Features Matrix** - This document lists new features available by patch and identifies any associated new documentation. The new features matrix document is available on MetaLink.
- **Readme File** - Refer to the readme file for patches that you have installed to learn about new documentation or documentation patches that you can download.

Related Guides

Oracle Trading Community Architecture Third Party Data Integration shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Trading Community Architecture Third Party Data Integration.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Trading Community Architecture Third Party Data Integration (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

Guides Related to This Product

Oracle Trading Community Architecture Data Quality Management User Guide

Use this user guide to learn how to identify and merge duplicate parties in the Oracle Trading Community Architecture registry. Data Quality Management includes both user-entered and third party data when searching for parties or matching potential duplicates. The Oracle Trading Community Architecture Data Quality Management User Guide describes how to set up and use transformation functions and match rules to identify possible duplicate parties.

Oracle Trading Community Architecture Party Merge User Guide

Use this user guide to learn how to merge parties and their related entities in the Oracle Trading Community Architecture registry. Party merge involves merging third party as well as user-entered data. The Oracle Trading Community Architecture Party Merge User Guide describes how to set up and process party merge batches as well as how to identify merge errors.

Oracle Trading Community Architecture API User Notes

Use these technical user notes to learn how to access the public TCA application programming interfaces (APIs) related to Third Party Data Integration. For each API, these user notes provide a description of the API, the PL/SQL procedure, the Java method, and a table of the parameter descriptions and validations.

Oracle Receivables User Guide

Use this user guide to learn how to set up and manage parties and customer accounts. The Third Party Data Integration setup determines which data is available and how data is managed in the Customers - Standard and Customers - Quick windows. The user guide also describes other features related to customer accounts.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11i. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Trading Community Architecture Third Party Data Integration implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Trading Community Architecture Third Party Data Integration and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Trading Community Architecture Third Party Data Integration working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

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Thank you for using Oracle Trading Community Architecture Third Party Data Integration and this user guide.

Oracle values your comments and feedback. In this guide is a reader's comment form that you can use to explain what you like or dislike about Oracle Trading Community Architecture Third Party Data Integration or this user guide. Mail your comments to the following address or call us directly at (650) 506-7000.

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1

Overview

This chapter provides an overview of Oracle Trading Community Architecture Third Party Data Integration.

Introduction

Use Oracle Trading Community Architecture (TCA) Third Party Data Integration to manage and acquire third party data in the TCA registry. The TCA registry is the single source of party information for multiple Oracle E-Business Suite applications. Parties are entities, of type Person, Organization, or Relationship, that can enter into business relationships.

Party information in the registry is categorized into entities, which consist of attributes. For example, the Person Profile entity contains attributes, such as last name and date of birth, that describe parties of type Person. Likewise, the Organization Profile entity consists of attributes that describe parties of type Organization, the Address entity has address-related attributes, and so on.

Data that you acquire from third party data sources coexist with user-entered data as separate records. For the party profile entities, Organization Profile and Person Profile, you can use Third Party Data Integration to set up a single source of truth (SST) record. Oracle applications display and use only the SST record for organization and person party profile information.

The SST record represents a single view of the most accurate information about a party's profile. The attributes in the SST record can contain information from different data sources, depending on your setup.

For the Other entities, meaning other than party profile entities, Oracle applications can display and use one or more records from different data sources, depending on your setup.

Third Party Data Integration also lets you:

- Set up rules to regulate overwriting and creating data.
- Purchase third party data from D&B.
- View and compare the user-entered, third party, and SST data for specific parties.

Major Features

Setting Up Data Sources

For the attributes in the Organization Profile and Person Profile entities, you select and rank data sources based on your perception of the accuracy of information from each source. For example, you can set the SST record to use the D&B source for the DUNS Number attribute but the user-entered source for the total number of employees. The single source of truth record takes attribute values from the highest ranked source that contains data.

For Other entities, you select the data sources at the entity level. For example, for the Contact Point entity, you can specify to display only the user-entered contact points in Oracle applications, but both the user-entered and third party addresses for the Address entity.

Controlling Overwrite and Creation of Data

To maintain accurate information in the TCA registry, you can define rules that manage the third party and user-entered data.

- **User overwrite rules** - Determine if new user-entered data can overwrite existing third party data in the SST record.
- **Third party overwrite rule** - Determines if new third party data can overwrite existing user-entered data in the SST record. This rule applies only to user-entered data that previously overwrote third party data.
- **User data creation rules** - Determine which Other entities users can create new records for.

Purchasing D&B Data

Use an online or batch method to acquire third party information from D&B. D&B provides profile, demographic, credit risk, and financial information about parties to help you make business decisions about the parties that you transact with.

Viewing and Using Information from Data Sources

In Oracle applications, you can view and use data from different data sources, based on your Third Party Data Integration setup.

Third Party Data Integration also provides view-only results of your setup. For each party, you can view its user-entered information, D&B information, or both along with the SST record for comparison.

You can also run two reports for more information about the D&B data in the TCA registry:

- Duplicate DUNS Report
- DNB Global Data Products Request Report

This chapter describes setting up:

- The integration with D&B for acquiring data from the D&B database.
- Party profile entities for the single source of truth record, including selecting and ranking data sources as well as defining user and third party overwrite rules.
- Other entities, including selecting data sources and defining user data creation rules.

Setting Up Third Party Data Integration

Set up Third Party Data Integration only if you acquire and use third party data in the TCA registry. It is recommended that you do not frequently change the setup.

Note: You should perform setup steps when no users are logged into Oracle Applications.

To set up Third Party Data Integration:

1. Integrate with D&B for acquiring data from the D&B database (if you are not already integrated with D&B), on page 2-3.
2. Select and rank data sources for party profile entities to set up the SST record, on page 2-8.
3. Define user overwrite rules for party profile entities (if you set up at least one attribute with third party data source in step 3), on page 2-12.
4. Define the third party overwrite rule for party profile entities (if you allow at least one attribute to be overwritten in step 4), on page 2-16.
5. Select data sources for Other entities, on page 2-29.
6. Define user data creation rules for Other entities (if you set up at least one entity with third party data source in step 6), on page 2-32.
7. Assign user overwrite and user data creation rules using profile options (if you defined any of these rules), on page A-2.
8. Run the Third Party Integration Update program to regenerate the SST record, on page 2-36.

Integrating with D&B

To purchase D&B data through Third Party Data Integration, you must have a contract with D&B for its Data Rationalization Service and integrate with D&B. Without third party data, there is no need to set up Third Party Data Integration.

For an overview of Third Party Data Integration setup, see *Setting Up Third Party Data Integration* on page 2-2.

To set up the integration with D&B:

1. Contact D&B for a contract. See *D&B Contract* on page 3-2.

D&B would then provide information that you need to access the D&B database from Third Party Data Integration:

- D&B HTTPS URL
 - D&B user name
 - D&B password
2. Contact your information technology department or organization for information about your web server.
 - Servlet agent URL
 - If you use a proxy server:
 - Web server proxy host name
 - Web server proxy port
 - Web server proxy user name (optional)
 - Web server proxy password (optional)

3. Use the information from D&B and your information technology organization to set up the profile options listed in this table.

Profile Option	Value
Apps Servlet Agent	Servlet agent URL
HZ: D&B Password	D&B password
HZ: D&B URL	D&B HTTPS URL
HZ: D&B User Name	D&B user name
HZ: Web Server Proxy Host Name	Web server proxy host name
HZ: Web Server Proxy Password	Web server proxy password
HZ: Web Server Proxy Port	Web server proxy port
HZ: Web Server Proxy User Name	Web server proxy user name

For more information about setting these profile options, see Profile Options on page A-2.

4. If you want to enable the purchasing of D&B data from the Customers - Standard and Customers - Quick windows, set the HZ: Display D&B Button in Customer Form profile option to *Yes*. See Profile Options on page A-2.

Party Profile Entities Setup

Your setup of the party profile entities controls, through the single source of truth record, how Oracle applications display and use organization profile and person profile information from various data sources. You select and rank data sources for each attribute in the party profile entities to determine where the SST record obtains its attribute values.

Oracle applications display and use the values from the SST record. SST data depends on not only the ranking but also the availability of data for each party. For example, one party might have both third party and user-entered records, while another has only user-entered data.

The Organization Profile entity contains attributes that correspond to the columns in the HZ_ORGANIZATION_PROFILES table, which provide the attribute values. For example, the SIC_CODE column stores the value for the SIC code attribute. Likewise, the Person Profile entity maps to the HZ_PERSON_PROFILES table.

If you do not acquire and use any third party data, or do not select any third party data sources for the SST record, Oracle applications always use the user-entered information.

Note: If you do not use any third party data, you do not need to set up data sources nor any rules for party profile entities.

If you do set up third party data sources, you can define rules to control whether or not new user-entered data can overwrite third party data in the SST record. If you allow user overwrite, you can also define rules to determine if new third party data can overwrite the user-entered data that originally overwrote third party data.

Note: You do not need to set up the Person Profile entity because Third Party Data Integration does not yet integrate with a business-to-consumer third party data provider.

For an overview of Third Party Data Integration setup, see *Setting Up Third Party Data Integration* on page 2-2.

Attribute Groups

Some of the attributes in the party profile entities are grouped, and each group has a primary attribute. Third Party Data Integration pages display only the primary attribute, but your data source and rule setup for the primary attribute applies to the entire group.

Whenever the SST record is regenerated after you run the Third Party Data Integration Update program, all nonprimary attributes in each group are populated from the same data source as their primary attribute. For more information about the program, see Third Party Data Integration Update Program on page 2-36.

If the highest ranked source has no data for the primary attribute, the SST record takes values from the next highest ranked source that does. If none of the data sources has data for the primary attribute, the other attributes in the group are treated like regular individual attributes in the SST record.

This table shows the Organization Profile attribute groups, including the primary attributes and the other attributes in each group.

Primary Attribute	Other Attributes in Group
CEO Name	CEO Title
DUNS Number	Displayed DUNS Party Identifier Enquiry DUNS Number
Headquarters or Branch Indicator	Branch Flag
Local Activity Code	Local Activity Code Type
Local Business Identifier	Local Business Identifier Type
Minority Owned Indicator	Minority Owned Indicator Type
Organization Name	Phonetic Organization Name
Principal Name	Principal Title
SIC Code	SIC Code Type

This table shows the Person Profile attribute groups, including the primary attributes and the other attributes in each group.

Primary Attribute	Other Attributes in Group
Person Identifier Number	Person Identifier Type
Person Name	Initials First Name Phonetic First Name Last Name Phonetic Last Name Middle Name Phonetic Middle Name

Even though user and third party overwrite rules also apply to the entire group, an attribute can be updated without requiring the other attributes in the group to be also updated by the same data source.

Note: The SIC code and type group has additional validations. These attributes must always have values from the same data source, and both must have values or none at all.

Setting Up Data Sources

Use the Set Up Data Sources pages to select and rank the data sources for the party profile entities. The single source of truth record takes attribute values from the highest ranked source that contains data.

For example, you rank D&B as the highest source for the DUNS Number attribute, followed by user entered. For party 1, if both D&B and user-entered records have a DUNS Number attribute value, the SST record takes the value from D&B. If party 2 has only a user-entered record, the SST record takes the user-entered DUNS Number. For each party, Oracle applications display and use the DUNS Number from the SST record.

Note: If not one data source has a value for a specific attribute, Oracle applications display nothing and the user can enter a value for that attribute.

You can view the current data source settings and give all attributes within an entity either the same setup or different settings. After you select the attributes to set up, you can update all the selected attributes together or individually. With the latter method, you sequentially update each selected attribute.

For an overview of party profile entities setup, see Party Profile Entities Setup on page 2-5.

To view and set up data sources for party profile entities:

1. Navigate to the Set Up Data Sources page (Content Access and Integration > Setup > Party Profile Entities > Set Up Data Sources).

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Trading Community

Diagnos... Return to Portal Logout Preferences Help

Setup Concurrent Request

Party Profile Entities Other Entities

Set Up Data Sources

Set Up User Overwrite Rules

Set Up Third Party Overwrite Rule

Set Up Data Sources

View and update data source ranking for the attributes of the Organization Profile or Person Profile entity. The highest ranked source for each attribute provides data for the single source of truth record that Oracle applications use and share.

Organization Profile Entity

Highest Ranked Data Source **User Entered**
Last Update Date **27-JUN-2002** View Attributes

Person Profile Entity

Highest Ranked Data Source **User Entered**
Last Update Date View Attributes

Setup | Concurrent Request | Diagnostics | Return to Portal | Logout | Preferences | Help

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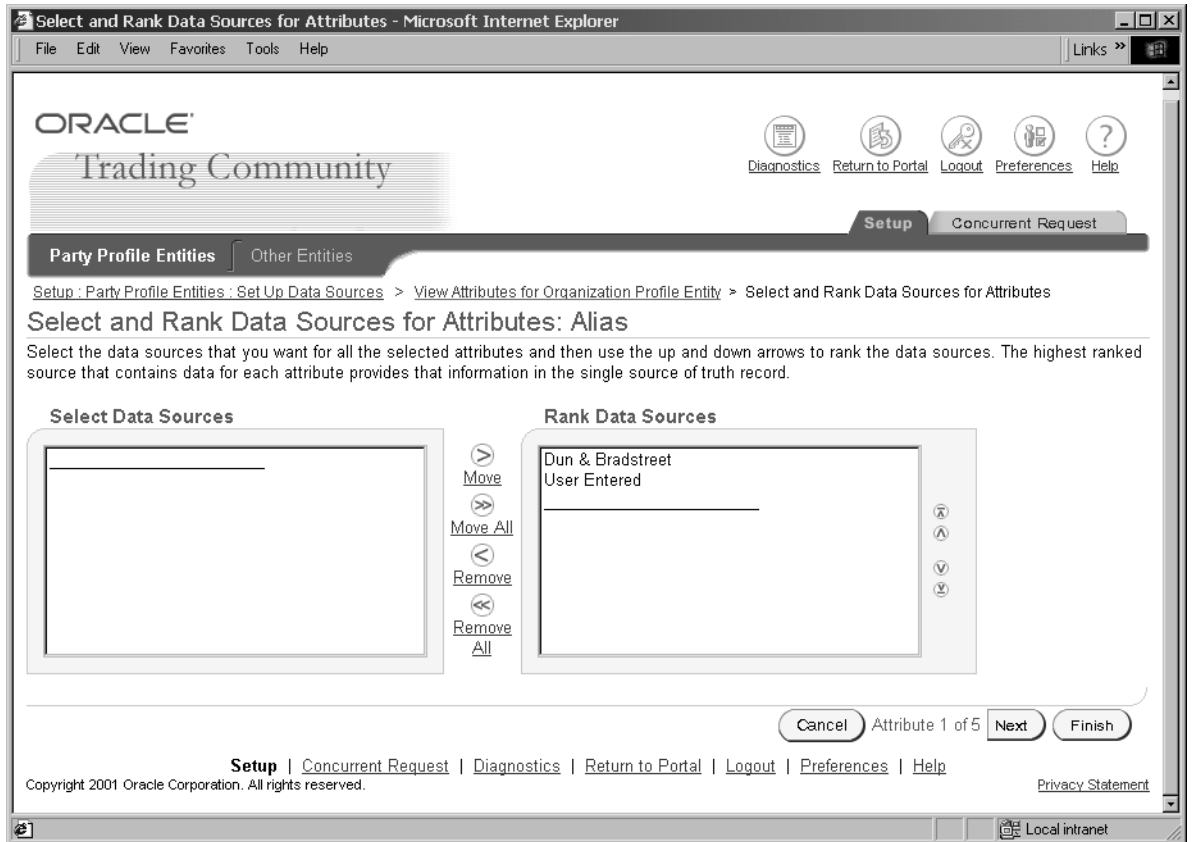
This page displays the current data source ranking for both the Organization Profile and Party Profile entity at the entity level. If an entity's attributes have different highest ranked data sources, the ranking status at the entity level is Mixed.

2. Press the View Attributes button to view and update data source ranking for each attribute.



3. Select at least one attribute and press either the Update as a Group or Update Individually button, depending on whether you want to update the selected attributes together or individually.

Note: If a displayed attribute is the primary attribute for an attribute group, your setup applies to the entire group. See Attribute Groups on page 2-6.



4. For either all selected attributes or an individual attribute, move data sources between the two boxes. Only the data sources in the Rank Data Sources box are considered for the SST record.

Note: By default, the User Entered data source is selected for the SST record. You cannot remove it from the Rank Data Sources box.

5. Rank sources in the Rank Data Sources box, with uppermost as highest ranked.
6. Press the Apply or Finish button.
7. Repeat steps 2 to 6 as needed.

Setting Up User Overwrite Rules

Use the Set Up User Overwrite Rules pages to define rules that allow or prevent users from overwriting third party data in the single source of truth record. Each rule includes all attributes from the party profile entities, and you define the rule for each individual attribute.

For example, the user-entered organization name is Party A and the D&B name is Party B. If the highest ranked source for the organization name attribute is D&B, the SST record takes Party B. If you allow user overwrite of the organization name attribute, the user can enter a new name, Party C, in an Oracle application. Party C replaces Party A in the user-entered record and Party B in the SST record. The D&B record with Party B is untouched.

User overwrite rules apply only to attributes with third party data from the highest ranked source. For example, the highest ranked source is user entered, but the SST record takes the D&B organization name Party B because a user-entered name does not exist. No matter what the rule is for organization name, if the user enters Party C, the SST record takes Party C because data now exists from the highest ranked source.

You can create multiple user overwrite rules and update them at any time. You can also duplicate an existing rule as a basis for a new rule. Use the HZ: User Overwrite Rule profile option to assign the rules at the user, responsibility, application, or site level. See Profile Options on page A-2.

If you are assigning only at the site level, you need to define only one user overwrite rule. If you do not define nor assign any rules, the default functionality allows user overwrite of all attributes.

You can delete user overwrite rules at any time. If you delete a rule that is assigned to users, the rule from the next assigned level would then apply to these users. For example, rules are assigned at the user, application, and site levels. If you delete the user level rule, the application level rule takes effect.

For an overview of party profile entities setup, see Party Profile Entities Setup on page 2-5.

To create, update, duplicate, or delete a user overwrite rule:

1. Navigate to the Set Up User Overwrite Rules page (Content Access and Integration > Setup > Party Profile Entities > Set Up User Overwrite Rules).

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Setup Concurrent Request

Party Profile Entities Other Entities

Set Up Data Sources
Set Up User Overwrite Rules
Set Up Third Party Overwrite Rule

Set Up User Overwrite Rules

Set up rules to allow or disallow user entered data to overwrite third party data in the single source of truth record. [Create New Rule](#)

Previous 1-2 of 2 Next

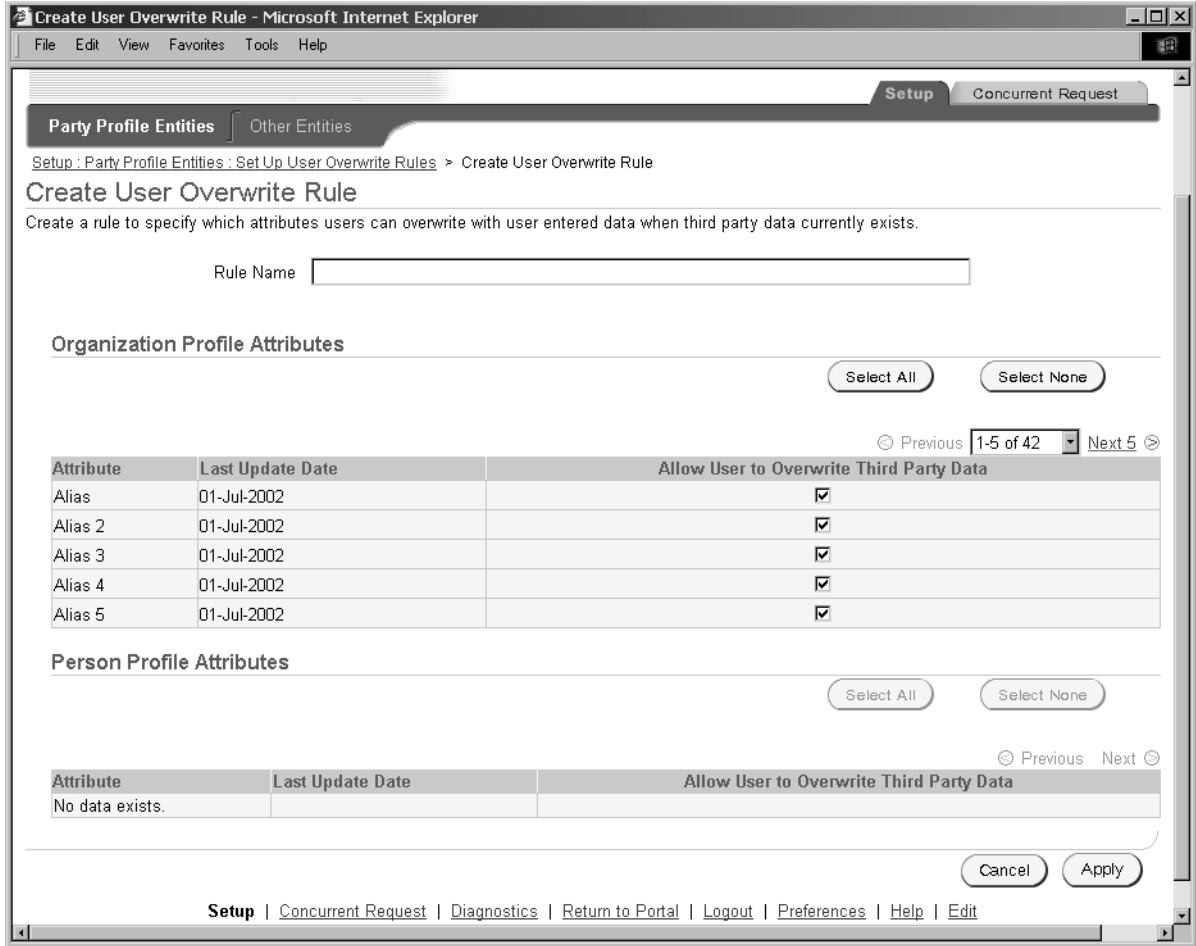
Rule Name	Last Update Date	Update	Duplicate	Delete
User Can Not Overwrite Any Attribute	30-May-2002			
User Can Overwrite All Attributes	30-May-2002			

Setup | [Concurrent Request](#) | [Diagnosics](#) | [Return to Portal](#) | [Logout](#) | [Preferences](#) | [Help](#)

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2. Press the Create New Rule button or click on the Update, Duplicate, or Delete icon.



3. If you are creating, updating, or duplicating a rule, enter or update the rule name as needed.
4. Check the Allow User to Overwrite Third Party Data check box if you want to allow user-entered data to overwrite highest ranked third party data in the SST record.

Tip: Uncheck only for attributes that are set up with third party data sources because if an attribute has only user-entered data, there is no third party data to prevent overwrite of.

Note: If a displayed attribute is the primary attribute for an attribute group, your setup applies to the entire group. See Attribute Groups on page 2-6.

5. Press the Apply button.
6. Repeat steps 2 to 5 as needed.

Setting Up the Third Party Overwrite Rule

Use the Set Up Third Party Overwrite Rule page to determine if newly acquired third party data can overwrite user-entered data in the single source of truth record. You define this rule for each attribute in the party profile entities.

The third party overwrite rule applies only to user-entered data that meet these conditions:

- The user-entered value previously overwrote third party data.

For example, Party B is the organization name in the SST record, as derived from the highest ranked source, D&B. The user then enters Party C in an Oracle application, replacing Party B in the SST record. In the meantime, D&B has updated its database with Party D as the name for this organization.

If third party overwrite is allowed for the organization name attribute, when D&B data is reacquired, Party D replaces Party C in the SST record and Party B in the D&B record. The user-entered record with Party C is untouched.

If third party overwrite is not allowed for this attribute, Party D replaces only Party B in the D&B record. The SST and user-entered record remain with Party C.

- The third party value that was previously overwritten comes from the highest ranked source.

For example, the highest ranked source is user entered, but the SST record takes the D&B organization name Party B because a user-entered name does not exist. The user enters Party C, which replaces Party B in the SST record. No matter how the third party overwrite rule is defined for organization name, newly acquired third party data cannot overwrite a user-entered organization name because user entered is highest ranked.

Note: Even if the third party overwrite rule applies and allows overwrite, the third party value does not overwrite the user-entered value if this third party value is exactly the same as the value that was previously acquired from this third party data provider.

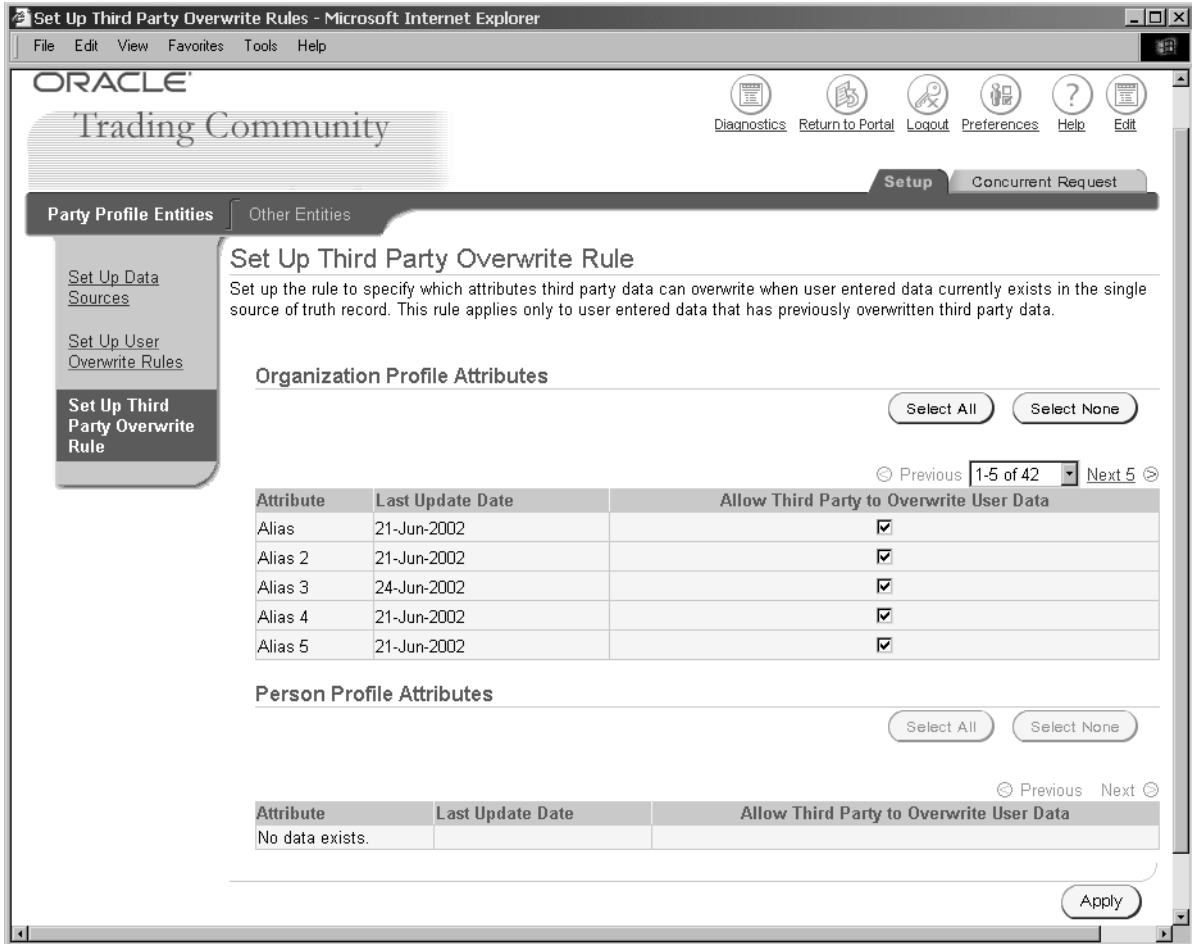
You define only one third party overwrite rule and do not need to manually assign it with a profile option. If you do not set up the third party overwrite rule, third party overwrite is not allowed for all attributes by default.

If your user overwrite rules do not allow user overwrite for any attribute, you do not need to define the third party overwrite rule because this rule applies only to user-entered data that overwrote third party data from the highest ranked source. To follow the first example from above, the user overwrite rule allows the user to overwrite Party B with Party C, so the third party overwrite rule applies to the organization name attribute.

For an overview of party profile entities setup, see Party Profile Entities Setup on page 2-5.

To set up the third party overwrite rule:

1. Navigate to the Set Up Third Party Overwrite Rule page (Content Access and Integration > Setup > Party Profile Entities > Set Up Third Party Overwrite Rule).



2. Check the Allow Third Party to Overwrite User Data check box if you want to allow third party data to overwrite user-entered data in the SST record.

Tip: Uncheck only for attributes that are set up with third party data sources because if an attribute has only user-entered data, there is no third party data to prevent from overwriting user-entered data.

Note: If a displayed attribute is the primary attribute for an attribute group, your setup applies to the entire group. See Attribute Groups on page 2-6.

3. Press the Apply button.

Party Profile Entities Setup Example

This example shows how different settings for some party profile attributes affect the functionality in Oracle applications. Some of these attributes are primary attributes that belong to attribute groups, but the example treats the primary attributes as if on their own. For an example of attribute group setup, see Attribute Groups Setup Example on page 2-24.

Data Sources Setup and Single Source of Truth Record

For the Organization Profile entity, you set up some attributes as shown in this table. This table also shows the available records for a specific party and the values that populate the single source of truth record based on the setup.

Attribute	Data Source Ranking	User-Entered Value	D&B Value	SST Value
Organization Name	1. D&B 2. User Entered	Company A	Company A	Company A
Year Established	1. D&B 2. User Entered	1992	1990	1990
CEO Name	1. D&B 2. User Entered	Joe Lee	<Not Available>	Joe Lee
Total Employees	1. User Entered 2. D&B	<Not Available>	100	100
SIC Code	1. User Entered 2. D&B	2520	2521	2520

User Overwrite Rule

This table shows the user overwrite rule for the five attributes.

Attribute	Allow User to Overwrite Third Party Data
Organization Name	No
Year Established	Yes
CEO Name	Yes
Total Employees	No
SIC Code	Yes

User Enters Data

This table describes what happens when a user tries to enter data. The table shows the SST values from above, the data sources of each value, the highest ranked data sources, as well as the new user-entered values and the new SST values, whether the user updated them or not.

Attribute	Current SST Value	Current SST Data Source	Highest Ranked Data Source	New User Entered Value	New SST Value
Organization Name	Company A	D&B	D&B	Company B	Company A
Year Established	1990	D&B	D&B	1992	1992
CEO Name	Joe Lee	User Entered	D&B	Joey Lee	Joey Lee
Total Employees	100	D&B	User Entered	1000	1000
SIC Code	2520	User Entered	User Entered	2522	2522

The user overwrite rule applies only to attribute values that have D&B as the current SST and highest ranked data source. This table describes which attributes the rule applies to.

Attribute	Rule Definition	Rule Is Applied	Description
Organization Name	Prevent Overwrite	Yes	The user overwrite rule prevents the user-entered value from overwriting the highest ranked D&B value in SST record.
Year Established	Allow Overwrite	Yes	The user overwrite rule allows the user-entered value to overwrite the highest ranked D&B value.
CEO Name	Allow Overwrite	No	The current SST data source is already user entered, and data still does not exist for the highest ranked D&B source, so the user can modify the user-entered record and accordingly update the SST record.
Total Employees	Prevent Overwrite	No	Even though the current SST value is from D&B, the user can overwrite it because user entered is the highest ranked source.
SIC Code	Allow Overwrite	No	The current SST data source is already user entered, and the highest ranked source is user entered, so the user can definitely update the SST value.

Third Party Overwrite Rule

This table shows the third party overwrite rule for the five attributes.

Attribute	Allow Third Party to Overwrite User Data
Organization Name	No
Year Established	Yes
CEO Name	No
Total Employees	Yes
SIC Code	Yes

New D&B Data is Acquired

This table shows what happens when D&B data is subsequently acquired. The table shows the SST values from above, the data sources of each value, the previous data sources, the highest ranked data sources, as well as the new D&B values and the new SST values, whether D&B updated them or not.

Attribute	Current SST Value	Current SST Data Source	Previous Data Source	Highest Ranked Data Source	New D&B Value	New SST Value
Organization Name	Company A	D&B	D&B	D&B	Company AA	Company AA
Year Established	1992	User Entered	D&B	D&B	1991	1991
CEO Name	Joey Lee	User Entered	User Entered	D&B	Joseph Lee	Joseph Lee
Total Employees	1000	User Entered	D&B	User Entered	2000	1000
SIC Code	2522	User Entered	User Entered	User Entered	2520	2522

The third party overwrite rule applies only to attributes that have a current user-entered value that previously overwrote a highest ranked D&B value. This table describes which attributes the rule applies to.

Attribute	Rule Definition	Rule Applies	Description
Organization Name	Prevent Overwrite	No	The SST record always had a D&B value, which is highest ranked, so the new D&B value updates the SST record.
Year Established	Allow Overwrite	Yes	The current user-entered value previously overwrote a highest ranked D&B value in the SST record. The rule allows the new D&B value to overwrite the user-entered value.
CEO Name	Prevent Overwrite	No	Even though the current SST value is user entered and the highest ranked source is D&B, the current SST value did not previously overwrite a D&B value. The new D&B value can overwrite the user-entered value because D&B is the highest ranked source.
Total Employees	Allow Overwrite	No	Even though the current SST value is user entered and previously overwrote a D&B value, D&B is not the highest ranked source. The new D&B value cannot overwrite the user-entered value because the highest ranked source is user entered.
SIC Code	Allow Overwrite	No	The SST record always had a user-entered value, which is highest ranked, so the new D&B value cannot update the SST record.

Attribute Groups Setup Example

This example shows how attribute groups in the SST record are populated and subsequently updated. For more information, see Attribute Groups on page 2-6.

This table shows the primary attribute and the other attribute in the group.

Primary Attribute	Other Attribute in Group
CEO Name	CEO Title
SIC Code	SIC Code Type

Data Source Setup and Single Source of Truth Record

This table shows the available records for a specific party and the values that populate the single source of truth record based on the setup. The setup for the primary attribute determines the setting for the other attribute in the group.

Attribute	Data Source Ranking	User-Entered Value	D&B Value	SST Value
CEO Name	1. D&B 2. User Entered	Jennie Lee	Jennifer Lee	Jennifer Lee
CEO Title	1. D&B 2. User Entered	CEO	<Not Available>	<None>
SIC Code	1. User Entered 2. D&B	<Not Available>	2952	2952
SIC Code Type	1. User Entered 2. D&B	<Not Available>	1977 SIC	1977 SIC

Primary attributes in the SST record are populated like individual attributes, but the other attributes in the group are populated based on the primary attributes' data source. For example, the CEO title attribute takes the D&B value, which is nothing, because the primary attribute, CEO name, takes a D&B value.

Note: The SIC code and type group has additional validations. At all times, they both must have values from the same data source or none at all.

User Overwrite Rule

This table shows the user overwrite rule for the four attributes. The setup for the primary attribute determines the setting for the other attribute in the group.

Attribute	Allow User to Overwrite Third Party Data
CEO Name	Yes
CEO Title	Yes
SIC Code	No
SIC Code Type	No

User Enters Data

This table describes what happens when a user tries to enter data. The table shows the SST values from above, the data sources of each value, the highest ranked data sources, as well as the new user-entered values and the new SST values, whether the user updated them or not.

Attribute	Current SST Value	Current SST Data Source	Highest Ranked Data Source	New User Entered Value	New SST Value
CEO Name	Jennifer Lee	D&B	D&B	<No Action>	Jennifer Lee
CEO Title	<None>	D&B	D&B	CEO	CEO
SIC Code	2952	D&B	User Entered	2999	2999
SIC Code Type	1977 SIC	D&B	User Entered	1987 SIC	1987 SIC

The user overwrite rule applies only to attribute values that have D&B as the current SST and highest ranked data source. This table describes which attributes the rule applies to and how attributes within a group can be updated separately except for the SIC code and type group.

Attribute	Rule Definition	Rule Applies	Description	New SST Data Source
CEO Name	Allow Overwrite	Yes	The user does nothing and leaves the D&B value in the SST record.	D&B
CEO Title	Allow Overwrite	Yes	Even though the primary attribute, CEO name, is still a D&B value, the user can overwrite the D&B CEO title in the SST record.	User Entered
SIC Code	Prevent Overwrite	No	Even though the current SST value is from D&B, the user can overwrite it because user entered is the highest ranked source.	User Entered
SIC Code Type	Prevent Overwrite	No	The user must also overwrite the D&B SIC code type in the SST record because SIC code and type must always have the same data source.	User Entered

Other Entities Setup

Your setup of the Other entities controls which data sources are available for Oracle applications to display and use for each of these entities: Address, Contact Point, Credit Rating, Financial Report, and Relationship.

An entity contains attributes that correspond to the columns in one or more tables which provide the attribute values. This table maps the Other entities to their relevant tables.

Other Entity	Table
Address	HZ_LOCATIONS and HZ_PARTY_SITES
Contact Point	HZ_CONTACT_POINTS
Credit Rating	HZ_CREDIT_RATINGS
Financial Report	HZ_FINANCIAL_REPORTS and HZ_FINANCIAL_NUMBERS
Relationship	HZ_RELATIONSHIPS

You select data sources for each entity at the entity level, not the attribute level. For example, if you select the user-entered and D&B data sources for the Address entity, for each party, Oracle applications display and use both the user-entered and D&B records.

If you do not acquire and use any third party data, or do not set up any third party data sources, Oracle applications always use the user-entered information.

Note: If you do not use any third party data, you do not need to set up data sources nor any rules for Other entities.

In Oracle applications, the user can update user-entered records for the Other entities but cannot manually update the third party data. The user, however, can update TCA-specific information in party site and relationship records from third party data sources. For example, even though a third party might provide all the addresses for a party's sites, the user can always determine which one is the primary address.

For each Other entity, you can define user data creation rules that determine whether users can create new records or not.

For an overview of Third Party Data Integration setup, see [Setting Up Third Party Data Integration](#) on page 2-2.

Address Entity and Tax Location Validation

For location-based tax validation purposes, an address cannot be updated when transactions are associated with the address, or party site. When you acquire new third party address information, if the new address significantly differs from the existing address, the old address would be deactivated. The new, active third party address replaces the previous address for the party site.

Setting Up Data Sources

Use the Set Up Data Sources pages to select the data sources for the Other entities. The selected sources provide records to be used and displayed in Oracle applications. Which records are actually displayed also depends on the availability of data.

For example, you select both the user-entered and D&B data sources for the Address entity. For party 1, if both D&B and user-entered address records exist, both records are displayed and used in Oracle applications. For party 2, if only a user-entered record exists for the Address entity, Oracle applications use only the user-entered information.

Note: Users can enter new records for any entity only if their assigned user data creation rule allows. See Setting Up User Data Creation Rules on page 2-32.

You can view the current data source settings and give all Other entities either the same setup or different settings. After you select the entities to set up, you can update all the selected entities together or individually. With the latter method, you sequentially update each selected entity.

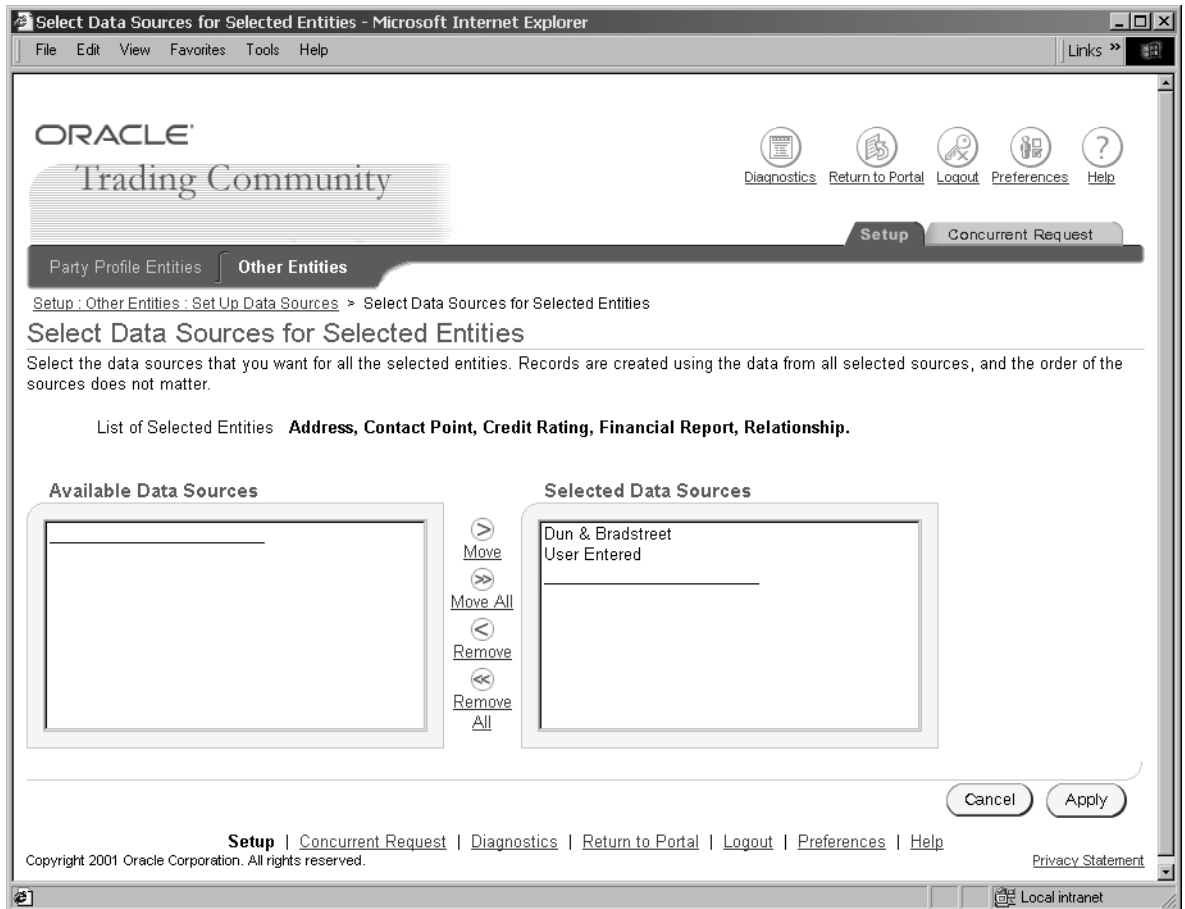
For an overview of Other entities setup, see Other Entities Setup on page 2-27.

To view and set up data sources for Other entities:

1. Navigate to the Set Up Data Sources page (Content Access and Integration > Setup > Other Entities > Set Up Data Sources).



2. Select at least one entity and press either the Update as a Group or Update Individually button, depending on whether you want to update the selected entities together or individually.



3. For either all selected entities or an individual entity, move data sources between the two boxes. Only data sources in the Selected Data Sources box are considered for providing records to use in Oracle applications.

Note: By default, the User Entered data source is selected. You cannot remove it from the Selected Data Sources box.

4. Press the Apply or Finish button.
5. Repeat steps 2 to 4 as needed.

Setting Up User Data Creation Rules

Use the Set Up User Data Creation Rules pages to define rules that allow or prevent new user-created records for each Other entity. The user can always update existing user-entered data, regardless of these rules.

You can create multiple user data creation rules and update them at any time. You can also duplicate an existing rule as a basis for a new rule. Use the HZ: User Data Creation Rule profile option to assign the rules at the user, responsibility, application, or site level. See Profile Options on page A-2.

If you are assigning only at the site level, you need to define only one user data creation rule. If you do not define nor assign any rules, the default functionality allows user data creation of all Other entities.

If you do not set up third party data sources for any Other entity, you do not need to set up any user data creation rules. The main function of these rules is to restrict data to third party information.

You can delete user overwrite rules at any time. If you delete a rule that is assigned to users, the rule at the next assigned level would then apply to these users. For example, rules are assigned at the user, application, and site levels. If you delete the user level rule, the application level rule takes effect.

For an overview of Other entities setup, see Other Entities Setup on page 2-27.

To create, update, duplicate, or delete a user data creation rule:

1. Navigate to the Set Up User Data Creation Rules page (Content Access and Integration > Setup > Other Entities > Set Up User Data Creation Rules).

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Setup Concurrent Request

Party Profile Entities **Other Entities**

Set Up Data Sources

Set Up User Data Creation Rules

Set Up User Data Creation Rules

Set up rules to allow or disallow user created data for specific Other entities. [Create New Rule](#)

Previous 1-2 of 2 Next

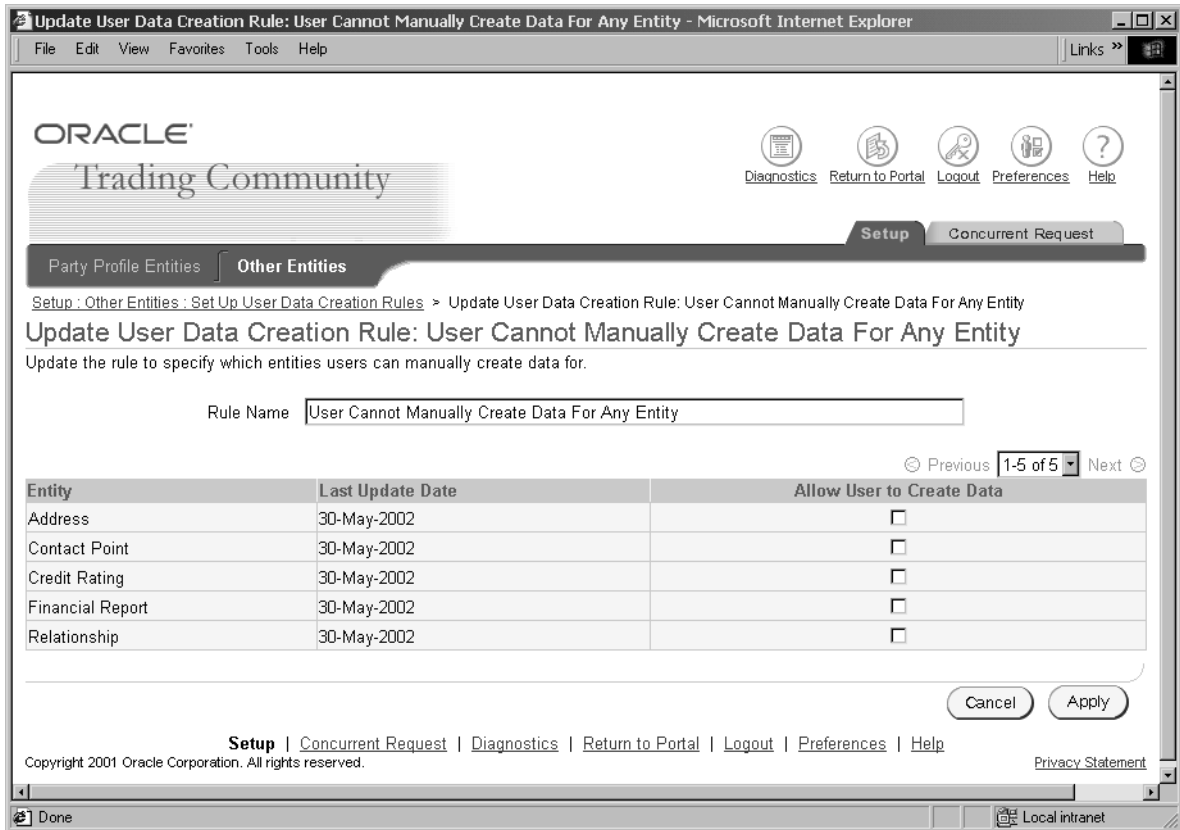
Rule Name	Last Update Date	Update	Duplicate	Delete
User Can Manully Create Data For All Entities	30-MAY-2002			
User Can Not Manully Create Data For Any Entity	30-MAY-2002			

Setup | [Concurrent Request](#) | [Diagnostics](#) | [Return to Portal](#) | [Logout](#) | [Preferences](#) | [Help](#)

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2. Press the Create New Rule button or click on the Update, Duplicate, or Delete icon.



3. If you are not deleting a rule, enter or update the rule name as needed.
4. Check the Allow User to Create Data check box if you want to allow new user-created records.

Tip: Uncheck only for entities that are set up with third party data sources because if an entity has only user-entered data, you do not need to prevent new user-entered data.

5. Press the Apply button.
6. Repeat steps 2 to 5 as needed.

Other Entities Setup Example

This example shows how different settings for the Other entities affect the functionality in Oracle applications.

Data Source Setup

You set up the Other entities as shown in this table. The table also shows which records are actually used and displayed in Oracle applications for a specific party.

Other Entity	Data Source Selection	User-Entered Record Exists	D&B Record Exists	Record in Oracle Applications
Contact Point	User Entered, D&B	Yes	Yes	User Entered, D&B
Credit Rating	User Entered, D&B	No	No	<None>
Financial Report	User Entered, D&B	No	Yes	D&B
Location	User Entered	Yes	Yes	User Entered
Relationship	User Entered	No	Yes	<None>

If neither data source exists, as is the case for the Credit Rating and Relationship entity, nothing is displayed in Oracle applications regardless of data source setup.

User Data Creation Rule

The user data creation rules do not depend on which data sources currently provide records in Oracle applications. The rules apply to all entities at all times.

For example, if the rule prevents user data creation for all entities, users cannot create new records even for the Credit Rating and Relationship entities, which contain no data from either source. If user-entered data already exists, as is the case for the Contact Point and Location entities, the user can update those existing records.

Third Party Data Integration Update Program

Use the Third Party Data Integration Update program to:

- Regenerate the single source of record.

The new SST values are based only on the data source setup for the party profile entities and the existing availability of data. It does not matter which data sources the current SST values come from, and none of the user nor third party overwrite rules apply.

- Regenerate some data for the Other entities.

Run this program each time after you update data source setup for party profile or Other entities. Your data source setup updates do not take effect in Oracle applications until you run this program.

Note: You do not need to run this program after updating only the setup for any of the rules. The updated rule setup automatically applies to new records, user actions, or third party downloads.

To run the Third Party Data Integration Update program, navigate to the Concurrent Request tab (Content Access and Integration > Setup > Concurrent Request). After you submit the request, you can check on the request status in the Standard Request Submission windows.

See also: Using Standard Request Submission, *Oracle Applications User Guide*

Prerequisite

Complete the Third Party Data Integration setup for the first time or update data source settings. For more information, see Setting Up Third Party Data Integration on page 2-2.

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Setup Concurrent Request

Submit Concurrent Request

Submit the Third Party Integration Update program to apply your updated Third Party Integration setup. The program regenerates the single source of truth record and updates the data for Other entities.

Commit Size
Number of updated or created records in each commit

Number of Workers
Number of parallel workers to process concurrent request

Submit

[Setup](#) | **Concurrent Request** | [Diagnostics](#) | [Return to Portal](#) | [Logout](#) | [Preferences](#) | [Help](#)

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Program Parameters

Commit Size

Enter the number of new or updated records to be included in each commit to the database.

Number of Workers

Enter the number of parallel workers that you want to use to process the Third Party Data Integration Update program. Workers are processes that run at the same time to complete a task that would otherwise take longer with a single process.

3

D&B Overview

This chapter gives an overview of D&B and the functionality that Third Party Data Integration provides for you to acquire D&B information.

Introduction

Dun & Bradstreet (D&B) maintains a growing global database of more than 70 million businesses worldwide. This database provides key information such as D&B's unique identifier, the DUNS Number, and executive contacts, as well as demographic, financial, and credit risk data. D&B provides information in the form of data products and Business Information Reports that contain a variety of data elements.

Third Party Data Integration lets you purchase party information from D&B by using a manual online process to retrieve information about a single party or by using a batch process for multiple parties. The D&B information is integrated with the party records in the TCA registry to maintain accurate information that you can use to evaluate credit risks.

In the TCA registry, a party exists separately from any business relationship that it enters into with other parties. A customer account for a party represents a business relationship that parties can enter into. The account has information about the terms and conditions of doing business with the party. The D&B information that you purchase is stored in TCA for parties, not for customer accounts.

See also: *Customer Overview, Oracle Receivables User Guide*

Aside from online purchasing or batch loading D&B information, you can also use Third Party Data Integration to view D&B information that exists in the TCA registry. You can also run reports to review parties with the same DUNS number or to determine what D&B data products have been requested.

D&B Contract

To purchase D&B information about businesses, you must have a contract with D&B for its Data Rationalization Service. Contact your D&B relationship manager to contract for the services that meet your data requirements.

If you do not have a relationship manager assigned to your company, contact D&B's Global Service Center at (888) 243-4566, e-mail dnb4oracle@dnb.com, or visit <http://www.dnb.com>. You can also contact D&B for information to interpret credit ratings and other information that D&B provides.

After you have a contract, you can set up Third Party Data Integration for acquiring D&B data. For more information, see *Integrating with D&B* on page 2-3.

Data Products

D&B data products meet the needs of businesses that transact business worldwide. Each data product provides different sets of information called data elements to meet your business decision-making criteria. The data products contain information such as:

- Business identity
- Number of employees
- Years in operation
- Industry
- Corporate structure
- Financial history
- Proprietary D&B scores and ratings that indicate credit risk

You can use Third Party Data Integration to obtain any of these data products:

- Business Verification
- Quick Check
- Delinquency Score
- Global Failure Risk Score
- Financial Standing
- Decision Support
- Enterprise Management
- Commercial Credit Score

For more information, see General Data Elements on page B-3 or Financial Data Elements on page B-17.

Business Verification

The Business Verification Global Data Product (GDP) provides the information necessary to verify a company's existence and validate its location with background information such as primary name, address, phone, SIC codes, branch indicator, and D&B DUNS Number.

Quick Check

The Quick Check GDP provides information that you use to perform low-risk credit assessments with D&B's core credit evaluation information. You can prescreen prospective customer accounts, evaluate a party's creditworthiness, and develop appropriate credit terms. In addition to the information in the Business Verification GDP, Quick Check includes financial event indicators, basic financial data, number of employees, payment activity summary, and the D&B Rating.

Delinquency Score

The Delinquency Score GDP contains a statistically modeled D&B score that indicates the risk of a company to make delinquent payments, based on payment history information from the D&B file. The higher the Delinquency Score, the lower the probability of payment delinquency. D&B's Delinquency Score lets you rank the customer accounts in your credit portfolio from highest to lowest risk of payment delinquency. You can also quickly divide new and existing accounts into various risk segments to determine appropriate marketing or credit policies. Most of the information included in the Quick Check GDP is also in the Delinquency Score GDP.

Global Failure Risk Score

The Global Failure Risk Score GDP contains a statistically derived predictive score that helps you assess the risk of business failure when dealing with global companies and managing the customer accounts in your global credit portfolios. The Global Failure Risk Score is a single, uniform measure predicting the risk of business failure over a 12-month period. This data product is ideal for companies that have centralized credit processes and policies or those with decentralized credit processing that plan to globally or regionally standardize decision making. The Global Failure Risk Score GDP contains the information included in the Delinquency Score GDP and other financial data.

Financial Standing

The Financial Standing GDP provides key financial information such as sales volume, net worth, assets, and liabilities to help you assess a party's financial condition. You can determine the financial strength of a business to set credit terms and conditions, perform research, or determine the strengths and weaknesses of a prospective customer account, existing customer account, or supplier. Key income statement and balance sheet information are provided, as well as information included in the Global Failure Risk Score GDP.

Decision Support

The Decision Support GDP provides information that you use with a decision support system or manual credit evaluation processes. You can improve the timeliness and consistency of credit decisions by matching your company's credit policies and requirements to D&B credit scores and ratings, as well as the party's financial information. This data product helps you set credit terms and conditions for medium- to high-risk value decisions, prioritize collection efforts, evaluate potential merger and acquisition candidates, and introduce rapid, accurate, and consistent credit decision making. The Decision Support GDP contains the data included in the Financial Standing GDP, as well as additional scores and ratings information.

Enterprise Management

The Enterprise Management GDP provides detailed demographic, corporate structure, risk, and financial information. You can use this information to improve risk assessment procedures, make better informed credit decisions, and improve the acquisition and retention of customer accounts. Enterprise Management includes the most complete set of data, scores, and ratings available about the party.

Commercial Credit Score (USA) Data Product

The Commercial Credit Score data product includes the Commercial Credit Score and other data elements that you can use to predict the likelihood that a company would pay invoices in a severely delinquent manner within the next 12 months. D&B defines severe delinquency as the receipt of payment more than 90 days past the due date. This data product also includes information about bankruptcies, delinquent payments, and payment history.

Note: This data product is only available to D&B customers in the US for businesses located in the US.

Business Information Report (BIR)

The Business Information Report (BIR) provides many of the data elements from the D&B database in a standard report format. You can order a BIR, store the report in your database, and view the report whenever necessary.

The BIR usually includes:

- D&B rating
- General information such as number of employees, business history, and so on
- Financial statements
- Payment performance information, such as the D&B PAYDEX score

Data Elements

The complete D&B database includes over 150 key business data elements. Each data product consists of a fixed set of data elements. These data elements provide information that you can use to identify, contact, and evaluate the credit risk of parties.

A few of the available data elements are:

- **DUNS Number** - Unique business identification number assigned by D&B to each commercial entity in the D&B database. If an organization has multiple locations, each location has a unique DUNS Number.
- **D&B Rating** - Rating that indicates a company's creditworthiness. The rating usually consists of a financial strength code and a risk indicator.

Note: For a key to the D&B Ratings, contact your local D&B representative or D&B's Global Service Center at (888) 243-4566, or visit Customer Service at <http://www.dnb.com>.

- **Local Business ID** - The primary business identification number assigned to the business by a government agency, chamber of commerce, or association.
- **Parent Bankruptcy Chapter Conversion** - Indicator of whether the parent of the business has converted its bankruptcy filing from one chapter to another; for example, from Chapter 11 to Chapter 7. This data element is only available as part of the Commercial Credit Score data product.

For more information, see General Data Elements on page B-3 or Financial Data Elements on page B-17.

Purchasing D&B Information

This chapter describes how to purchase D&B information through the online and batch load process.

Online Purchasing

Use the online purchasing functionality of Third Party Data Integration to search for and purchase Dun & Bradstreet (D&B) information on specific companies from D&B's database. You can update the information obtained from D&B during online sessions or by using the batch loading process.

You can purchase and retrieve D&B information for organizations that exist or do not exist in the TCA registry. When you obtain D&B information about a company that does not exist in the TCA registry, a new party is created using the D&B data.

To obtain D&B information for a party, you can follow one of several scenarios:

- If the party does not exist in the TCA registry, you can search the D&B database to determine if information about the business is available in the D&B database.
 - If data is available from D&B for the new party, you can purchase that data from D&B and automatically create a new party in the TCA registry.
 - If data is not available from D&B for the new party, you can order an investigation from D&B to gather the necessary data.
- If the party already exists in the TCA registry:
 - You can initially purchase D&B information, or update D&B information for the party.
 - If a party with the same DUNS number exists in the TCA registry similar to the party that you want to create, you can copy D&B data from the existing party to the new party.

Process Overview

You can initiate the online purchase of D&B information from the Party Search page or the Customers Workbench.

To purchase D&B information online:

1. Search for an existing party in the TCA registry, on page 4-4 or purchase D&B data from the Customers Workbench, on page 4-15.
2. Search for the business in the D&B database, on page 4-6.

3. Purchase D&B information for the party, on page 4-8:
 - In the form of a data product
 - In the form of a Business Information Report
4. Optionally copy D&B information, if available, from an existing party, on page 4-11.
5. Optionally request a D&B investigation for a party, if it does not exist in the D&B database, on page 4-12.

Searching for Existing Parties in the TCA Registry

Use the Party Search page to determine if a party already exists in the TCA registry and to find the party that you want to purchase D&B information for. To purchase D&B information and use it to create a new party, you must first search the party records to confirm that the party does not already exist.

Party Search - Microsoft Internet Explorer provided by Dev. Services

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Party Search

You may search for a party using the basic company information such as the name and address or, more advanced information such as a DUNS Number, Local Business Id or SIC Code.

Basic Search Criteria

Party Name	<input type="text"/>	Party Number	<input type="text"/>
Site Number	<input type="text"/>	Address	<input type="text"/>
City	<input type="text"/>	State	<input type="text"/>
Postal Code	<input type="text"/>	Province	<input type="text"/>
County	<input type="text"/>	Country	<input type="text"/>

[Show Advanced Search](#)

No Match

No parties matched your search criteria. You may change your search criteria and perform another search or create a new party by clicking on the New Party button. A new party will automatically be created after you purchase D&B data for this party, and a Party Number will be assigned to the party.

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Done Local intranet

To search for a party in the TCA registry:

1. Navigate to the Party Search page (Content Access and Integration > Dun and Bradstreet > Access/Purchase).
2. In the Basic or Advanced Search Criteria sections of the Party Search page, enter sufficient data to search for the party. You can display the Advanced Search Criteria section by clicking on the Show Advanced Search link located below the Basic Search Criteria section.
3. Click the Search button.

If your search criteria do not match any existing party in the TCA registry, you can press the New Party button to create a new party. If your search criteria match existing parties, but the specific party that you are searching for is not displayed, you can press the New Party button to create your specific party.

If your search criteria match the party you are searching for, click the link for the party in the Party Name column of the Search Results section and then navigate to the Dun and Bradstreet tab to purchase or update D&B information.

Searching for Businesses in the D&B Database

Use the Dun and Bradstreet Search and Results page to search the D&B database to determine if D&B's database contains information about your party. You can search for either a party that you want to create using D&B information or for an existing party that you want to purchase or update D&B information for.

The identifying address is used as the default search criteria for searches in the D&B database.

Dun and Bradstreet Search Page - Microsoft Internet Explorer provided by Dev. Services

File Edit View Favorites Tools Help

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Party Search Return To Portal Log Off Preferences Help

User Entered **Dun and Bradstreet** Comparison

Summary Business Verification Special Events Relationships BIR Credit, Risk and Financial Analysis

Dun and Bradstreet Search and Results

Dun and Bradstreet Company Search

You can search for D&B company information using a DUNS Number, local business ID, phone number or the company name with the country location. If a company is based in the U.S., you must use the State field as a search criterion. If you have not previously purchased D&B data for this company, then the data you have entered provides the default search criteria. If you have previously purchased D&B data, then the available D&B data provides the default search criteria. If the company is located in Germany, you must select a reason.

DUNS Number: 80-473-5132
 Local Business ID:
 Phone Number: 6505550000
 Name: Gorman Manufacturing Company
 Country: US
 State/Province: CA
 Address: 492 KOLLER STREET
 Postal Town: SAN FRANCISCO
 Postal Code: 94110
 Alternate Name:

Search

Local intranet

To search the D&B database:

1. Search the TCA registry to determine if the party exists. If the party does not exist, you can create a new party. For more information, see Searching for Existing Parties in the TCA Registry on page 4-4.
2. Navigate to the Dun and Bradstreet tab. For more information about the tabs, see Viewing Information from Data Sources on page 5-2.
3. Press the Purchase Dun and Bradstreet Information button.
4. In the Dun and Bradstreet Search and Results page, enter at least one of the search criteria or accept the defaults. If you are searching for a business located in the US, you must enter the appropriate state abbreviation in the State/Province field.

Note: The local business ID, which can be assigned by a governmental agency or a nongovernmental organization, is one of the most commonly used and effective search criteria.

5. If you are searching for information about a German company, you must provide a reason for purchasing D&B information about the company in the Reason field.
6. Press the Search button.

Existing businesses in the D&B database that meet your criteria are displayed in the Search Results from Dun and Bradstreet section.

You can either select the appropriate business and press the Purchase button, or order an investigation. If the TCA registry contains D&B information for a similar party, you can copy that information. For more information, see Copying D&B Information from a Party on page 4-11.

If your search results in no matches, you can order an information investigation from D&B. For more information, see Requesting a D&B Investigation for a Party on page 4-12.

Purchasing D&B Information

Use the Available Packages page to purchase D&B information for an existing or new party. You can purchase D&B information in the form of Global Data Products (GDP), Business Information Reports (BIR), and other data products. If a party exists in the TCA registry, you can either purchase initial information for that party or update the party's current D&B information.

Although you can purchase and retrieve business information in the form of data product files, you might initially want to gather basic information about a business in the form of a BIR. For more information, see Business Information Report (BIR) on page 3-6.

Dun and Bradstreet Search Page - Netscape

File Edit View Go Communicator Help

Postal Town
 Postal Code
 Alternate Name
 Reason

Search

Search Results from Dun and Bradstreet

The following companies matched your search criteria. Please select the appropriate company and then click the Purchase button to purchase D&B data for that company. If the search did not find the appropriate company, you can order a D&B Business Information Report by clicking on the Order Investigation button.

Company List

Previous **1-5 of 5** Next

Select	DUNS Number	Name	Address	Postal Town	State/Province	Postal Code	Country	HQ/Branch
<input checked="" type="radio"/>	80-473-5132	GORMAN MANUFACTURING COMPANY, INC	492 KOLLER STREET	SAN FRANCISCO	CA	94110	AMERICA	Headquarters
<input type="radio"/>	03-873-2116	GORMAN MANUFACTURING COMPANY, INC	1073 S BOYLE AVE	LOS ANGELES	CA	90023	AMERICA	Branch
<input type="radio"/>	19-965-0169	GORMAN, DENNIS	12 W KENTUCKY AVE	WOODLAND	CA	95695	AMERICA	Single Location
<input type="radio"/>	00-917-5688	GORMAN MFG CO INC	8129 JUNIPERO ST SUITE A	SACRAMENTO	CA	95828	AMERICA	Headquarters
<input type="radio"/>	08-884-7942	GORMAN MFG & SUPPLY CO	6516 MATTOS LN	SACRAMENTO	CA	95829	AMERICA	Branch

[User Entered](#) | [Dun and Bradstreet](#) | [Comparison](#) | [Party Search](#) | [Return To Portal](#) | [Log Off](#) | [Preferences](#) | [Help](#)

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Document: Done

To purchase D&B information for a party:

1. Search the TCA registry for the party you want to purchase D&B information for. For more information, see Searching for Existing Parties in the TCA Registry on page 4-4.
2. Search the D&B database for the party you want to purchase D&B information for. For more information, see Searching for Businesses in the D&B Database on page 4-6.
3. In the Dun and Bradstreet Search and Results page, select the appropriate company in the Search Results section.
4. Press the Purchase button.

You might find that D&B information exists for a similar party with the same DUNS Number in the TCA registry. For more information, see Copying D&B information from a Party on page 4-11.

5. In the Available Packages page, select the data product or BIR that you want to purchase in the Package field.

The following table shows which data product provides information to the subtabs and sections in the User Entered, Dun and Bradstreet, and Comparison tabs.

Subtab	Section	Data Product
Summary		All
Business Verification		All
Special Events		<ul style="list-style-type: none"> ■ Commercial Credit Score ■ Decision Support ■ Enterprise Management ■ Financial Standing ■ Quick Check
Relationships		Enterprise Management
BIR		Business Information Report (BIR)

Subtab	Section	Data Product
Credit, Risk, and Financial Analysis	Credit Management	■ Commercial Credit Score
		■ Decision Support
		■ Delinquency Score
		■ Enterprise Management
		■ Financial Standing
		■ Global Failure Risk Score
		■ Quick Check
Credit, Risk, and Financial Analysis	Financial Reports	■ Decision Support
		■ Enterprise Management
		■ Financial Standing
		■ Quick Check

For more information about these subtabs, see [Viewing Information from Data Sources](#) on page 5-2.

6. In the Language field, select the language that you want to display the data product or BIR in.
7. Press the Purchase button.
A process begins to purchase and retrieve D&B data from D&B's global database and update your party record with the D&B data.
8. Press the Done button.

After you complete this process, you can review the D&B information in the tabs. For more information, see [Viewing Information from Data Sources](#) on page 5-2.

Copying D&B Information from a Party

You can copy D&B information from an existing party to a new party or to a similar existing party.

After you press the Purchase button in the Dun and Bradstreet Search and Results page, if the TCA registry contains D&B information for a similar party, you can copy existing D&B information from that party to the party that you are creating or updating.

Prerequisites

- Search the TCA registry to determine if the target party exists. For more information, see Searching for Existing Parties in the TCA Registry on page 4-4.
- Search the D&B database to determine if it contains information about the target party. For more information, see Searching for Businesses in the D&B Database on page 4-6.

Note: Possible duplicate parties might exist in the TCA registry if the same D&B information applies to more than one party.

To copy D&B information from one party to another:

1. Select the source party in the Results section.
2. Press the Use Existing Information button.

Note: If you do not want to copy the D&B information from any of the available businesses, press the Purchase New Information button. For more information, see Purchasing D&B Information on page 4-8.

3. Press the Done button.

After you complete this process you can review the D&B information in the tabs. For more information, see Viewing Information from Data Sources on page 5-2.

Requesting a D&B Investigation for a Party

Use the Order an Investigation page to request an investigation for a business that you cannot find in the D&B database.

Because of the time required to conduct an investigation, you cannot use D&B data to create a new party at the same time that you request an investigation from D&B.

Although most investigations are requested to gather basic information about a business, you can request an investigation to simply have a DUNS Number created for this party or to order a Business Information Report.

Prerequisites

- Search the TCA registry to determine if the party exists. If the party does not exist, you can create a new party. For more information, see Searching for Existing Parties in the TCA Registry on page 4-4.
- Search the D&B database to determine if the party information exists in the D&B database. For more information, see Searching for Businesses in the D&B Database on page 4-6.

Investigation Page - Microsoft Internet Explorer provided by Dev. Services

File Edit View Favorites Tools Help

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Party Search Diagnostics Return to Portal Logout Preferences Help Customize

User Entered Dun and Bradstreet Comparison

Summary Business Verification Special Events Relationships BIR Credit, Risk and Financial Analysis

Order an Investigation

To order a D&B investigation about a company, please enter identifying data and any other data that could be used to research the company. After researching this company, Dun and Bradstreet will email a Business Information Report to the email address entered by you.

Company: Gorman Manufacturing Company, Inc

DUNS Number:

Street: 492 KOLLER STREET

Postal Town: SAN FRANCISCO

Postal Code: 94110

Local Business ID:

Phone Number: 6505550000

Service: Regular

Additional Info:

Report/Datasheet: D and B Business Information Report

Email To: ajohnson@vision.com

Cancel Submit

Local intranet

To request a D&B investigation on a business:

1. Navigate to the Order an Investigation page.

Information about the party defaults into this page to identify the parts that you want to investigate. If the party does not exist in the TCA registry, the criteria entered in the Dun and Bradstreet Search and Results page provides the default identifying information.

2. Select a level of priority for your investigation request in the Service field.

In the US, a Regular investigation is usually carried out by D&B within five business days. A Priority investigation is completed the next business day but incurs a premium price from D&B.

3. In the Additional Info text box, enter additional information to identify your party or other instructions to D&B.
4. In the Report/Datasheet field, select D and B Business Information Report if you want to request a Business Information Report.
5. The Email To field defaults with the email address that your system administrator entered in your user definition, which is maintained in the Email field of the Users window for your user definition. If an e-mail address has not been entered in your user definition, you must enter your e-mail address in this Email To field.

D&B sends an e-mail to this address to acknowledge your request for an investigation report and to notify you when the investigation has been completed. A separate e-mail provides you with a BIR containing the information that D&B gathered about your party.

Purchasing D&B Information from the Customers Workbench

You can access and purchase D&B data online from the Customers - Standard or Customers - Quick window. A party must exist before you can purchase D&B data for the party from the Customers Workbench.

See also: Entering Parties and Customer Accounts, *Oracle Receivables User Guide*

To purchase D&B information from the Customers workbench:

1. Navigate to the Customers - Standard or the Customers - Quick window.

Note: The identifying address is used as the search criteria when you search the D&B database for the first time. Searches performed after the initial purchase of D&B information use the address provided by D&B as the default address. You can use a different address for a search by changing the address in the Dun and Bradstreet Search and Results page.

2. Press the Third Party Data button.
3. Navigate to the Dun and Bradstreet tab. For more information about the tabs, see Viewing Information from Data Sources on page 5-2.
4. Press the Purchase Dun and Bradstreet Information button.
5. In the Dun and Bradstreet Search and Results page, search for the business in the D&B database. For more information, see Searching for Businesses in the D&B Database on page 4-6.
6. Purchase D&B information for the party. For more information, see Purchasing D&B Information on page 4-8. You might find that you can copy D&B information from a similar party in the TCA registry. For more information, see Copying D&B information from a Party on page 4-11.

Batch Loading

Use the batch load process to update D&B information for a large number of parties on a regular schedule or whenever you need. You can update all parties, gather data only for new parties, or update parties that have not been updated since a specified date. Batch retrieval and loading of D&B information is usually a regularly scheduled, automated process that your system administrator sets up and runs.

Process Overview

To batch load D&B information for multiple parties:

1. Run the Generate Request List for DNB Batch Load program to generate a list of parties that you want to request D&B data for, on page 4-17.
2. Transfer the file containing the request list to D&B, on page 4-19.
3. Receive a properly formatted file, ready for loading, from D&B.
4. Run the SQL*Loader utility to load D&B information into the HZ_PARTY_INTERFACE table.
5. Run the Load D&B Data program to load D&B information from the interface table into the appropriate HZ tables, on page 4-20.

Generate Request List for D&B Batch Load

Use the Generate Request List For DNB Batch Load program to select and generate a text file of the parties that you require updated D&B information for. The request list includes the following data elements:

- DUNS Number
- Party name
- Address1
- Address2
- Address3
- Address4
- City
- State
- Country
- Postal code
- Party ID
- Phone number

After the Generate Request List For DNB Batch Load program successfully completes, you can find the request list in the usual directory for concurrent request output files.

The Party ID for each party is included in the output file that D&B returns to you after you submit your request list and is used to match D&B information to the appropriate party in the TCA registry.

Use the Standard Request Submission windows to submit the Generate Request List for D&B Batch Load program.

See also: Using Standard Request Submission, *Oracle Applications User Guide*

Program Parameters

Request list option

Select the type of request list that you want to generate:

- All parties
- Only parties not having DNB data
- Only parties whose DNB data was last updated prior to LAST UPDATE DATE

Last update date

Enter the last update date that you want to base the request on. You need to specify this date only if you are using request list option 3.

Transferring a Request List File to D&B

Your system administrator must make specific arrangements with D&B for the transfer of the file that identifies the parties that you are requesting data for. Through a manual process, your system administrator usually sends the file to D&B on a cartridge or a diskette. The file can also be sent to D&B using File Transfer Protocol (FTP) or as an e-mail attachment.

Load D&B Data

Use the Load D&B Data program to load the D&B information from the HZ_PARTY_INTERFACE table into the appropriate TCA tables. The Mapping API utility ensures that the information in the D&B data elements populate the appropriate fields and TCA tables.

Use the Standard Request Submission windows to submit the Load D&B Data program.

See also: Using Standard Request Submission, *Oracle Applications User Guide*

Prerequisites

Before you can run the Load D&B Data program, your system administrator must use SQL*Loader to load data from the ASCII flat file that D&B provides for batch loading into the HZ_PARTY_INTERFACE table. The flat file contains D&B information for the parties that you requested.

Program Parameter

Group ID

Enter the Group ID of the batch of records that you want to process. Leave this parameter blank to process all records in the interface table.

Mapping of D&B Data Elements

When you run the Load D&B Data program, certain D&B data elements are mapped to the appropriate columns in Oracle Applications. Most of the columns have the same names as the D&B data elements, but other columns have more general names that differ from those used by D&B. The Mapping API utility maps the D&B data elements to the Oracle Applications columns.

DUNS Number is the Same as the Related DUNS Number

If the party is the headquarters, the HQ DUNS Number is the same as the DUNS Number for the party. This case also applies to related parties. If the DUNS Number of the related party is the same as the party DUNS Number, two possible scenarios arise:

- If the party is a Domestic Ultimate, Global Ultimate, or Headquarters, a relationship is created between the party and its related party. Both of the companies in the relationship will be the same, to convey that the party itself is of type Domestic Ultimate, Global Ultimate, or Headquarters.
- If the related party does not have a parent, D&B does not provide parent information.

DUNS Number and Enquiry DUNS Number

Outside of North America, D&B does not store information at the branch level. If you request information for a company that is a branch location outside of North America, D&B provides data for its headquarters. The DUNS Number for the branch's headquarters is used to select the D&B data for the headquarters. The DUNS Number for the branch is displayed as the Enquiry DUNS Number. If a headquarters record does not exist in the TCA registry, Third Party Data Integration automatically creates one.

Mapping API Utility

The Mapping API utility takes information from the interface table and inserts the data into the appropriate database tables. The utility processes party data in two phases:

1. Data for the party is processed.

The utility retrieves records one by one for the parties from the interface table and then processes them. Online requests for information cause the processing of only one record.

New records in the interface table are identified with a STATUS data element value of *N*. When the utility successfully processes a record, the utility changes the STATUS value for the record to *P1*. If D&B does not have any information about a business, the utility changes the party's DUNS Number to *00000000* and the STATUS value to *B* for blank. If the utility cannot successfully process the record, it changes the STATUS value for the record to *E1*, to indicate that an error occurred while processing that party record.

2. Information for related parties associated with the party are processed. Related parties, such as the Parent, Headquarters, Domestic Ultimate, and Global Ultimate locate the party within an organization's hierarchy.

When you request D&B data for more than one party, the utility must process all of the party records in the first step before processing data for the organizations associated with each party. Only if a party record was successfully processed in the first step can the utility process data for the organizations associated with that party.

When the utility successfully processes the organization data associated with a party, it changes the STATUS value for the record to *P2*. If the utility cannot successfully process the organization data associated with a record, it changes the STATUS value for the record to *E2* to indicate that an error occurred while processing the related party data.

Correcting Mapping API Utility Errors

Most *E1* and *E2* errors occur due to changes in information codes that D&B provides for the data elements. All errors are listed in the HZ_PARTY_INTERFACE_ERRORS table. Your system administrator should be able to access the interface table and correct any errors. After making the necessary corrections, your system administrator should change the STATUS codes from *E1* to *N* or from *E2* to *P1* so that the corrected data will be appropriately processed the next time that you run the Mapping API utility.

Reviewing Third Party Data Integration Information

This chapter describes the information from different data sources that you can view for specific parties, as well as the reports that provide additional information about the D&B data in the TCA registry.

Viewing Information from Data Sources

Third Party Data Integration lets you view information from all relevant data sources for any given party. Before you acquire any third party data about a party, you can only view the user-entered party information. After you purchase and retrieve D&B information for a party, for example, you can view the D&B information and compare it to the user-entered information.

For party profile information about parties of type Organization or Person, you can also compare the user-entered and third party data with the single source of truth (SST) data. Each attribute in the SST record contains data from either a user-entered or third party data source, depending on the Third Party Data Integration setup and the availability of data.

For example, a party has Party A as the user-entered organization name and Party B from the D&B database. The D&B data source is ranked above the user-entered source. For this party, you would see Party A in the user-entered record, Party B in the D&B record, and Party B in the SST record, which takes data from the highest ranked source.

To view information from different data sources for a party:

1. Search for the party that you want to view information about. See [Searching for Existing Parties in the TCA Registry](#) on page 4-4.
2. Navigate to the User Entered, Dun and Bradstreet, or Comparison tab for the type of information that you want to see. For more information about the displayed data, see [Subtabs of Information](#) on page 5-3.

Subtabs of Information

The User Entered, Dun and Bradstreet, and Comparison tabs display information in organized subtabs. The following subtabs appear in all three tabs.

- **Summary** - The Summary subtab provides general information about the party such as DUNS Number, postal address, and the last update date.
- **Business Verification** - The Business Verification subtab provides:
 - Demographic information such as CEO name, fiscal year-end month, potential revenue, and functional currency.
 - Business keys such as legal status, business structure, SIC code, and local business identification.
 - Employee statistics such as the total number of employees and the number of employees at the location that you purchased D&B data for.
- **Special Events** - The Special Events subtab provides information about legal proceedings, disasters, and operational special events.

The User Entered and Comparison tabs consist only of these three subtabs. The Dun and Bradstreet tab includes three more subtabs.

User-Entered Information

The screenshot shows a web browser window titled "User Entered - Microsoft Internet Explorer provided by Dev. Services". The page header includes the Oracle logo and "Trading Community". Navigation links include "Party Search", "Return To Portal", "Log Off", "Preferences", and "Help". A sub-navigation bar contains "User Entered", "Dun and Bradstreet", and "Comparison". The main content area is titled "Summary" and displays the following information:

Name	Gorman Manufacturing Company, Inc
Alternate Name 1	
DUNS Number	80 - 473 - 5132
Enquiry DUNS	80 - 473 - 5132
Address	492 KOLLER STREET
Postal Town	SAN FRANCISCO
State/Province	CA
Postal Code	94110
Country	United States
Primary Phone Number	650 555-0000
Last Update Date	07-Jan-2002
Party Number	6416

At the bottom of the page, there is a footer with navigation links: "User Entered | [Dun and Bradstreet](#) | [Comparison](#) | [Party Search](#) | [Return To Portal](#) | [Log Off](#) | [Preferences](#) | [Help](#)". Below this is the copyright notice: "Copyright 2001 Oracle Corporation. All rights reserved." and a link to the "Privacy Statement". The browser status bar at the bottom shows "Done" and "Local intranet".

The User Entered tab displays basic party information that users have entered or loaded using Oracle Applications.

D&B Information

The screenshot shows a web browser window titled "Dun and Bradstreet - Microsoft Internet Explorer provided by Dev. Services". The page header includes the Oracle logo and "Trading Community". Navigation links include "Party Search", "Return To Portal", "Log Off", "Preferences", and "Help". A secondary navigation bar shows "User Entered", "Dun and Bradstreet" (selected), and "Comparison". Below this is a sub-tab bar with "Summary" (selected), "Business Verification", "Special Events", "Relationships", "BIR", and "Credit, Risk and Financial Analysis".

The main content area displays the following information for Gorman Manufacturing Company, Inc.:

Name	Gorman Manufacturing Company, Inc
Alternate Name 1	
DUNS Number	80 - 473 - 5132
Enquiry DUNS	80 - 473 - 5132
Address	492 KOLLER STREET
Postal Town	SAN FRANCISCO
State/Province	CA
Postal Code	94110
Country	United States
Primary Phone Number	650 555-0000
Last Update Date	07-Jan-2002

A button labeled "Purchase Dun and Bradstreet Information" is located below the table. At the bottom of the page, there is a footer with navigation links: "User Entered | Dun and Bradstreet | Comparison | Party Search | Return To Portal | Log Off | Preferences | Help" and a "Privacy Statement" link. The copyright notice reads "Copyright 2001 Oracle Corporation. All rights reserved." The browser status bar at the bottom indicates "Local intranet".

The Dun and Bradstreet tab displays information that is purchased and retrieved from D&B. The information displayed depends on which Global Data Product you purchase for that party, either ordered online or batch loaded. For more information, see Online Purchasing on page 4-2 and Batch Loading on page 4-16.

This tab includes basic party information that is displayed in the other tabs. In addition, the following three subtabs also appear in the Dun and Bradstreet tab. These subtabs only display information provided by D&B. The data product purchased for the party determines which data elements in these subtabs contain values.

- **Relationships** - The Relationships subtab displays information for up to five related entities or organizations: Primary Organization, Headquarters, Parent, Domestic Ultimate, and Global Ultimate. For each relationship, the displayed information can consist of the related party's name, DUNS Number, address, and telephone number.
- **BIR** - The BIR (Business Information Report) subtab displays an image of the BIR for the party.
- **Credit, Risk, and Financial Analysis** - The Credit, Risk, and Financial Analysis subtab displays either the Credit Management or Financial Reports views:
 - The Credit Management view displays payment and risk information. Some of the data elements included are Paydex data, D&B Rating, delinquency scores, and failure scores.

Note: For a key to the D&B Ratings, contact your local D&B representative or D&B's Global Service Center at (888)243-4566, or visit Customer Service at <http://www.dnb.com>.

- The Financial Reports view displays available income statement and balance sheet data as well as financial ratios. This view also indicates whether the financial statements are consolidated, audited, restated, and so on.

Comparison Information

The screenshot shows the Oracle Trading Community interface in a Microsoft Internet Explorer browser window. The page title is "Comparison - Microsoft Internet Explorer". The Oracle logo and "Trading Community" are visible at the top. Navigation links include "Party Search", "Diagnostics", "Return to Portal", "Logout", "Preferences", and "Help". The "Comparison" tab is selected, and the "Business Verification" subtab is active. Below the subtab, a description states: "The Business Verification region provides information about a company's demographics, lines of business, and employees." A "Demographics" table compares data from three sources: User Entered, Dun and Bradstreet, and Single Source of Truth Data.

	User Entered	Dun and Bradstreet	Single Source of Truth Data
DUNS Number	80 - -47 - 3-51	80 - 473 - 5132	80 - 473 - 5132
Alternate Name 1			
Alternate Name 2			
Alternate Name 3			
Alternate Name 4			
Alternate Name 5			
Do Not Confuse With			
FAX Number			
CEO Name and Title		LESLIE SMITH, PRES	LESLIE SMITH, PRES
Principal Name and Title			
Year Established		1965	1965
Year Incorporated		1965	1965
Control Year		1965	1965
Preferred Functional Currency		USD	USD

The Comparison tab lets you simultaneously view attributes from the User Entered tab and the corresponding D&B data elements from the Dun and Bradstreet tab. In the Business Verification subtab, you can also compare this information with the single source of truth record, which consists of either the user-entered or D&B data.

Duplicate DUNS Report

Use the Duplicate DUNS Report to identify parties with the same DUNS Number in the TCA registry. You can run the report to find duplicates for a particular DUNS number or duplicates for any DUNS Number.

For each party with the same DUNS Number, the report displays:

- Party name
- Party number
- Address
- City
- State
- Country

Use the Standard Request Submission windows to submit the Duplicate DUNS Report.

See also: Using Standard Request Submission, *Oracle Applications User Guide*

Report Parameters

Duplicate DUNS Number

Enter the DUNS Number that you want to identify duplicates for.

If you enter a DUNS Number, the report only displays a result if two or more parties use that same DUNS Number. If you leave the parameter blank, the report displays any duplicated DUNS Numbers and the parties associated with those DUNS Numbers.

DNB Global Data Products Request Report

Use the DNB Global Data Products Request Report to find out when D&B products were requested, who requested each product, and which GDP was purchased. The report provides information that you can use to control the purchase of and access to D&B information.

The report contains the following details about each request:

- Party name
- Party number
- Requested product

Note: If Batch Load appears in this column, the last update to this party's D&B information was completed using the batch load process.

- Purchaser
- Purchased date

Use the Standard Request Submission windows to submit the DNB Global Data Products Request Report.

See also: Using Standard Request Submission, *Oracle Applications User Guide*

Report Parameters

Start Date

Enter the date that you want to report from.

End Date

Enter the date that you want to report to.

A

Profile Options

This appendix lists the profile options that affect the operation of Oracle Trading Community Architecture Third Party Data Integration. This appendix includes a brief description of each profile option that you or your system administrator can set at the site, application, responsibility, or user levels.

Profile Options

During implementation, your system administrator sets a value for each profile option to specify how Third Party Data Integration controls access to and processes data.

See also: Overview of Setting User Profiles, *Oracle Applications System Administrator's Guide*

Profile Options in Third Party Data Integration

This section lists the profile options in Third Party Data Integration.

Note: D&B should provide you with the appropriate information for the D&B user name, D&B user password, and the D&B HTTPS URL. Your information technology organization should provide you with the information needed to set up the profile options related to the appropriate web server proxy.

Apps Servlet Agent

This profile option identifies the servlet agent URL (Apache listener) for your Oracle Applications instance. This URL is used to construct URLs for SERVLET and JSP type functions and has the format *http://:/. For example, `http://ap999us.oracle.com:8000/servlet_zone`.*

HZ: Allow User to Update Third Party Data

This profile option is not yet used.

HZ: D&B Password

Enter the password that D&B provides for you to log in to the D&B database.

HZ: D&B Policy Function Exists

This internal profile option is automatically set to *Yes* after you purchase D&B data and cannot be changed.

HZ: D&B User Name

Enter the user ID that D&B provides for you to log in to the D&B database.

HZ: D&B URL

Enter the URL that D&B provides for you to log in to the D&B database.

HZ: Display D&B Button in Customer Form

This profile option displays or hides the D&B Information button in the Customers - Standard and Customers - Quick windows. Enter *Yes* to enable the button or accept the *No* default.

HZ: Third Party Data Integration Set Up for Organization Profile Entity

Third Party Data Integration automatically sets this internal profile option to *Yes* after you set up at least one attribute in the Organization Profile entity with a third party data source and run the Third Party Data Integration Update program for the first time.

HZ: Third Party Data Integration Set Up for Person Profile Entity

Third Party Data Integration automatically sets this internal profile option to *Yes* after you set up at least one attribute in the Person Profile entity with a third party data source and run the Third Party Data Integration Update program for the first time.

HZ: User Data Creation Rule

Enter the user data creation rule that you want to assign at any of the profile option levels. For each Other entity, the rule determines whether the user can create new records or not.

HZ: User Overwrite Rule

Enter the user overwrite rule that you want to assign at any of the profile option levels. For each attribute in the single source of truth record, the rule determines whether user-entered data can overwrite third party data or not.

HZ: Web Server Proxy Host Name

If your organization uses a proxy server, enter the host name that your information technology group provides.

HZ: Web Server Proxy Password

Enter the password that your information technology group provides if your organization uses a proxy server. The password for the web server proxy might be optional if your web server proxy does not require it.

HZ: Web Server Proxy Port

If your organization uses a proxy server, enter the proxy port number that your information technology group provides.

HZ: Web Server Proxy User Name

Enter the user ID that your information technology group provides if your organization uses a proxy server. The user ID for the web server proxy might be optional if your web server proxy does not require it.

Profile Option Access and Defaults

This table indicates whether you can view or update profile options and at which levels your system administrator can update these profile options: the user, responsibility, application, or site levels.

The key for this table is:

- **Update** - You can update the profile option.
- **View Only** - You can view the profile option but cannot change it.
- **No Access** - You cannot view or change the profile option value.

Profile Options	Value	Default	User Access	System Administrator Access			
				User	Responsibility	Application	Site
HZ: D&B Password	Required	No Default	Update	Update	Update	Update	Update
HZ: D&B Policy Function Exists	Optional	No Default	No Access	View Only	View Only	View Only	View Only
HZ: D&B User Name	Required	No Default	Update	Update	Update	Update	Update
HZ: D&B URL	Required	No Default	Update	Update	Update	Update	Update
HZ: Display D&B Button in Customer Form	Optional	No Default	Update	No Access	No Access	No Access	Update
HZ: Third Party Data Integration Set Up for Organization Profile Entity	Optional	No Default	No Access	View Only	View Only	View Only	View Only
HZ: Third Party Data Integration Set Up for Person Profile Entity	Optional	No Default	No Access	View Only	View Only	View Only	View Only
HZ: User Data Creation Rule	Optional	No Default	View Only	Update	Update	Update	Update

Profile Options	Value	Default	User Access	System Administrator Access			
				User	Responsibility	Application	Site
HZ: User Overwrite Rule	Optional	No Default	View Only	Update	Update	Update	Update
HZ: Web Server Proxy Host Name	Optional	No Default	Update	Update	Update	Update	Update
HZ: Web Server Proxy Password	Optional	No Default	Update	Update	Update	Update	Update
HZ: Web Server Proxy Port	Optional	No Default	Update	Update	Update	Update	Update
HZ: Web Server Proxy User Name	Optional	No Default	Update	Update	Update	Update	Update

D&B Data Elements List

This appendix lists and describes the D&B data elements supported by Oracle Trading Community Architecture Third Party Data Integration.

Overview

The D&B data products include over 150 separate data elements that are mapped to columns in the TCA party registry. The names of some of the D&B data elements are slightly different from the column names in the HZ tables.

See also: *Oracle eBusiness Suite Electronic Technical Reference Manual (eTRM)*

General Data Elements

Average High Credit

The average high credit represents the median of the highest credit extended to the subject business over the past 12 months. The average is calculated by taking the sum of all high credit dollar amounts from unique supplier account experiences divided by the total number of account experiences.

Capital Type

This element group describes the amount and type of capital in the business. The amount and currency code specify the value. Type Indicator describes whether the amount is Issued Capital, Paid in Capital, Nominal, or Authorized. Paid Up or Issued Capital is the amount of capital pledged by shareholders at any given time and is calculated by multiplying the number of shares issued by the par value or face of each share. Some shares confer different obligations or voting rights on their owners. The share capital is a component of the equity of any company along with reserves and accumulated profits or losses. In the event of a liquidation of the business, any shares not yet paid up must be fully paid up at that time. Nominal or Authorized Capital refers to a maximum amount of set issued or paid-up capital beyond which the subject could not issue any further capital or shares.

CEO Name

The name of the individual identified as having the chief executive function. The CEO is the highest ranking person on site: President, Owner, Branch Manager, and so on. Some data products provide the individual's title along with the name.

CEO Title

The position title of the primary executive in the company.

Claims Indicator

Indicates if open claims, liens, protested bills, warrants, Social Securities Summons, or equivalent exist in the D&B database for the case company.

Commentary

Automatically generated comments, as necessary.

Commentary Counter

Number of Commentary items.

Commercial Credit Score (USA)

The Commercial Credit Score (USA) is a statistically modeled D&B score indicating the risk of delinquent payments based on the information in D&B's files. The higher the score, the lower the probability of payment delinquency.

The Commercial Credit Score (USA) predicts the likelihood that a company will pay its bills in a severely delinquent manner (over 90 days past term) within the next twelve months. Severely delinquent is defined as a business with at least 25% of its payments slow and at least 10% of its payments 90 days or more past due.

This score is only available to D&B customers in the United States for businesses located in the United States.

Commercial Credit Score (USA) Data Product

This data product includes the Commercial Credit Score (USA) as well as other indicators of creditworthiness such as the D&B Credit Rating, the Paydex score, and bankruptcy information.

This score is only available to D&B customers in the United States for businesses located in the United States.

Control Year

The year that the present majority control or ownership of shares was established. Can be the same as Start Year.

Country Code

The two character ISO code for the country where the business is located.

Credit Score Class

A number between 0 and 5 that indicates the risk of delinquent payments over the next 12 months.

Credit Score Class Explanation

A descriptive explanation of the Credit Score Class. It describes the risk of delinquent payment over the next 12 months.

Credit Score Percentile

The percentile places the business in a 1 to 100 rank order with 1 indicating the highest risk and 100 indicating the lowest risk among the other businesses in D&B's US database.

Criminal Indicator

The Criminal Indicator provides an indication of whether criminal proceedings related to the case exist in D&B's database.

Currency

Default three character ISO currency code for figures in the data product.

D & B Rating

The D&B Rating gives an indication of credit worthiness. The D&B Rating is normally divided into two parts, the financial strength code and the risk indicator reflects the risk associated with the business. The Financial Strength component is an indication of the size of the subject's tangible net worth (that is, the shareholders funds less any intangible assets) based primarily on the most recent fiscal balance sheet results. The Composite Appraisal component is linked to the level of risk and is an overall evaluation of credit worthiness. It takes into account the financial condition but also several nonfinancial factors such as trade payment history, length of operation, employee numbers, legal structure, management experience, and any adverse listings.

In some countries, D&B uses other information in its databases to assign an ER code (size by employee range) to businesses within specific industries or *R* ratings for companies without current financial statements on file. The Rating Interpretation Tables contain specific rating definitions and interpretation tables for countries around the world.

Date Scored

The date on which the Commercial Credit Score was generated.

Debarments Element Group

A count of the US government debarments present in the D&B file and the date of the last current debarment filing.

Delinquency Score (calculated)

The Credit/Delinquency Score is a statistically modeled D&B score indicating the risk of delinquent payments based on the information in D&B's files. The higher the Delinquency Score, the lower the probability of payment delinquency.

The US Delinquency Score predicts the likelihood that a company will pay its bills in a severely delinquent manner (over 90 days past term), or obtain legal relief from creditors, or cease operations without paying all creditors in full over the next 12 months, based on the information in D&B's files. Severely delinquent is defined as a business with at least 25% of its payments slow and at least 10% of its payments 90 days or more past due.

The Australian Delinquency Score measures the probability that a business will pay in a severely delinquent manner, defined as at least 10% of trade payments being more than 90 days beyond terms in the next 12 months.

The New Zealand Delinquency Score predicts the probability of severely delinquent payment within the next 12 months; however, the definition of severely delinquent is at least 20% of trade payments being more than 60 days beyond terms.

The Canadian Delinquency Score predicts the likelihood of a firm paying in a severely delinquent manner during the next twelve months where severely delinquent is defined as over 90 days past terms.

Delinquency Score Class

The Delinquency Score Class enables you to quickly segment your new and existing accounts into various risk segments to determine appropriate marketing or credit policies. The Class segments the data into five distinct risk groups where 1 represents businesses that have the lowest probability of severe delinquency, 5 represents businesses with the highest probability of severe delinquency. The Incidence of default relates the percentage probability of delinquency outcome for a score range/class.

Delinquency Score Commentary

The Credit (Delinquency) Score Commentary is a repeating field containing codes which explain the conditions driving the score assigned to the business.

Delinquency Score Industry Percentile, Delinquency Score National Percentile

The Delinquency Score Percentile illustrates where a company falls among businesses in the D&B information base, and is most effectively used to rank order portfolios from highest to lowest risk of business failure. The percentile is based on a 1 to 100 scale, where 1 represents businesses that have the highest probability of severe delinquency, and 100 which represents businesses with the lowest probability of severe delinquency.

Delinquency Score Override Code

Delinquency Score Override Code is populated for special case instances in Australia where the delinquency score is a special value (0, 893-895) or cannot be calculated.

Disaster Special Events Indicator

Indicates if special events exist in the D&B database for the subject company concerning disasters such as fire, flood, earthquake, hurricane, and so on.

Domestic Ultimate Element Group

This group of elements provides the Domestic Ultimate Name, DUNS Number, and country code in which the business is located. The Domestic Ultimate is the highest corporate family member in the same country as the subject business if you walk up the branch of the corporate family tree. A business may be its own domestic

ultimate. The fields will be blank if the subject business is a single location (not linked) in the D&B database. The Domestic Ultimate Name is the legal business name. The Domestic Ultimate party can be a headquarters or a branch/division. A country can have more than one Domestic Ultimate organization. There will be a separate Domestic Ultimate party for each limb of a tree.

Do Not Confuse With

Indicates that a similarly named business should not be confused with the business undergoing review.

DUNS Number

DUNS, which stands for Data Universal Numbering System, is a 9-digit nonindicative identification number assigned by D&B to each separate commercial entity in the D&B database. Each record is given a different number. For businesses with multiple locations, each location is assigned its own unique DUNS Number. This field is always populated and contains the DUNS number of the business that all other data elements in the record describe.

Employees Statistics Group

The Employees Statistics group provides the total number of persons employed by this business and the number of persons at this physical address (excluding employees of branches or divisions who are not at this physical address). The Estimated or Actual and the Minimum, Maximum, or Average indicators qualify the data provided for the number of employees.

Enquiry DUNS

Identifier of case enquired upon, will be the same as DUNS unless a trade up from a branch to a headquarters location has taken place.

Export Indicator

Indicates that the D&B database contains information whether the business exports or not.

Failure Score (calculated), Failure Score Aggregate, Failure Score Industry Incidence of Default

D&B's Failure Scores predict the probability of severe financial distress or failure. The Failure Score Commentary field is available only from the US and contains explanation codes for that particular score.

In the US, the calculated failure score (values 1,001 to 1,850) provides a direct relationship between the score and the level of risk. A 1,001 represents businesses that have the highest probability of financial stress, an 1,850 the lowest probability of financial stress. The marginal odds of being good doubles for each 40 point

increase. For example, a score of 1,200, on a marginal basis, represents twice the risk of financial stress as a score of 1,240. This score enables you to use more granular cutoffs to drive your automated decision-making process. Failure scores are not calculated in the US for those businesses designated as Discontinued at This Location, Open Bankruptcy, Higher Risk, or Self Inquired D-U-N-S®. These records are automatically assigned a score of 0.

For Japan, the Failure Score (values 0 to 10) predicts the probability of closure (failure) in the next twelve months.

In Canada, where there is a Stability Score predicting the probability of business closure, instead of failure, the value in the Failure Score field is the Stability Score (values 1 to 10).

Failure Score Class

The Failure Score Class segments the data into five distinct risk groups where 1 represents businesses that have the lowest probability of financial stress, and 5 represents businesses with the highest probability of financial stress. This class enables you to quickly segment new and existing accounts into various risk segments to determine appropriate marketing or credit policies. The Incidence of default relates the percentage probability of failure outcome for a score range/class.

Failure Score Commentary

The Failure Score Commentary field is available only from the US and contains explanation codes for that particular score.

Failure Score National Percentile

The percentile score of 1 to 100 indicates where a company falls among businesses in the local D&B information base, and is most effectively used to rank order portfolios from highest to lowest risk of business failure. A percentile score of 1 represents businesses that have the highest probability of financial stress, and a 100 which represents businesses with the lowest probability of financial stress. Percentile Scores are available from Western Europe, the US and Australia.

Failure Score Override Code

In Europe, the Failure Score Override Code indicates the reason for variance between the D&B Rating and Failure Score. European values are: 1 indicates severe negative information, 2 indicates minimal data, 3 indicates new business, 4 indicates out of business, 5 indicates miscellaneous information. In the US, the code indicates the reason no score was calculated or that the score is equal to 0. The US values are 6 indicates special events, 7 indicates business discontinued at this location, 8 indicates open bankruptcy. Override codes 9 to 19 will be used to

indicate special case instances for Australia where the failure score is a special value (0, 900 to 995) or cannot be calculated.

Fax Number

The main facsimile number for the subject business.

Financial Embarrassment Indicator

Indicates whether a record exists of an open bankruptcy, receivership liquidation, discontinuance with unpaid obligations or an equivalent event related to the company in the D&B database. Other specific event categories relate to administrator appointments and orders, Meeting of Creditors, Wind Up Petitions and Statements of Insolvency.

Financial/Legal Special Events Indicator

Indicates whether special events exist in D&B's database that denote financial embarrassment or legal filings related to the business. These include Public Sales, Change of 50% of Assets, Public Filings, Letter of Liability, and Principals Antecedents – Bankruptcy.

Global Failure Score Aggregate, Global Failure Score (calculated), Global Failure Score Age, Global Failure Score Date

D&B's Global Failure Score predicts the likelihood of a firm ceasing business without paying all creditors in full, or reorganizing, or obtaining relief from creditors under state or federal law over the next 12 months. D&B's Global Failure Score is only available as a raw score with a four-digit scale starting from 1001-1850.

The Global Failure Score is a single, uniform measure predicting risk of failure in any included country. Included countries are defined as those countries that have a statistical model that predicts business failure for companies within that country. In the score's first version, these countries are Australia, Belgium, France, Germany, Italy, Netherlands, Portugal, Spain, United Kingdom, and United States.

While the Global Failure Score is defined as a single, uniform measure predicting risk of failure in any country, the definition of failure can vary from country to country. Therefore the Global Failure Score may be different for Country A and Country B at the same approval rate.

In most cases Global Failure Score will be used in combination with Local Country Failure Scores. The Global Failure Score provides a globally standardized measure of failure risk, whereas the Local Country Failure Scores provides information on how a specific company is performing relative to its peers in the same country. Both of these scores are critical for decision making and portfolio management for global

customer account and vendor portfolios. Global Failure Score Age and Date are reserved for future use and are not currently populated.

Global Ultimate Element Group

This group of elements gives you the Global Ultimate Name, its DUNS number, and the Country Code in which it is located. The Global Ultimate is the highest member of the corporate family worldwide. Fields will be blank if the business has a single location in the D&B database. The Global Ultimate Name is the legal business name. The Country code is the two-character ISO code for the country in which the Global Ultimate is located.

Headquarters or Branch

Indicates if the subject location is a branch or division. Branches and/or divisions are typically other locations, apart from the headquarters or principal trading office, from which the organization conducts its business. However, a division can operate from the same location as the headquarters. The distinction is that a division will utilize a separate tradestyle name and have separate and distinct operations from that of the headquarters. Branches are not separate legal entities. Indicates whether the subject business is a branch, headquarters, or single location.

Headquarters Element Group

This group of data elements gives you the Headquarters Name, its DUNS number and the Country Code in which it is located. If the case inquired upon is a branch or division, the Headquarters DUNS, Name, and Country Code (two-character ISO code) will appear in these fields. Fields will be blank if the record is a single location (not linked) in the D&B database.

High Range Score for Incidence of Delinquent Payment

This is the value of the high end of the range of the Commercial Credit Score for which an incidence of delinquency percentage could be linked. If range is between 240 to 280, the high range score is 280.

Highest Credit

Highest credit extended in the last 12 months.

History Indicator

Code indicating whether:

- Detrimental information exists about the company in the D&B database. For example, a current or past bankruptcy.
- Detrimental information exists about the management of the business in the D&B database. For example, a bankrupt affiliate.

- Complete details exist about the management and company, but no detrimental information exists in the D&B database
- Incomplete details exist on management or company, but no detrimental information exists in the D&B database.

The History Indicator is not available from all of D&B's databases, including Europe, Australia, and New Zealand.

Import Indicator

Indicates whether the D&B database contains information that the business imports or not.

Incidence of Delinquent Payment Percentage for All Firms

This value is the delinquency percentage for all firms in D&B's US database.

Incidence of Delinquent Payment Percentage for Range

This value is the delinquency percentage for a specific Commercial Credit Score range.

Incorporation Year

The year the business incorporated. The Incorporation Year may or may not be the same as the year the business started.

International Dialing Code

The international telecommunications dialing code for the country in which the business is located.

Legal Status

A code indicating the legal structure of the business as registered with governmental authorities. Examples include LSC/102 (private limited company) or LSC/10 (general partnership).

Line of business

Narrative description of the operations or activities of the business generated from the primary SIC code under which it is classified.

Local Activity Code Element Group

Local Activity Classification Code. This field contains only NACE codes where they are available. NACE codes are a statistical classification of economic activities of the European Community. The Local Activity Code Type indicates whether the NACE code in the Local Activity Code field is a four- or five-digit NACE.

Local Business ID Element Group

The Local business ID Number field contains the primary business identification number assigned to the business by a government agency, Chamber of Commerce or association. The ID Type field contains the code representing the type of business identification number.

Location Ownership

Indicates whether premises at physical address are owned or rented.

Low Range Score for Incidence of Delinquent Payment

This value is the low end of the range of the Commercial Credit Score for which an incidence of delinquency percentage could be linked. If range is between 240 to 280, the low range score is 240.

Name

The primary name of the business.

Negative Payment Explanation

Conditional comment generated when negative payment comments are used.

No Trade Indicator

Indicates if there are no trade experiences, or completed payment transactions, in the D&B files for this business.

Number of Trade Experiences

Number of completed transactions, usually payment experiences.

Operational Special Events Indicator

Indicates whether special events exist in the D&B database that concern changes to the business' operations. These include categories such as name changes, management changes, changes of legal form, control, or capital; business wind up or closure; or moves.

Other Special Events Indicator

Indicates that special events not otherwise specified exist in the D&B database for the business.

Out of Business Indicator

Indicates that the company has discontinued operations.

Parent Element Group

This group of data elements gives you the Parent Name, its DUNS number and the Country Code in which it is located. The Parent company has a majority interest in the subject company. The subject company is then referred to as a 'Subsidiary.'

Paydex

The D&B payment score (Paydex) is a score that assesses the payment performance of a business. Based on the trade experiences in D&B's database, the score corresponds to an average days beyond terms or within terms enabling you to predict when your existing or potential customer accounts are likely to pay. Derived from a dollar-weighted average of a company's combined individual payment experiences, it ranges from 0 to 100 with higher scores representing businesses which pay their bills more promptly. The Paydex Interpretation Tables contain interpretation tables for D&B's payment score for specific countries.

Paydex 3 Months Prior

Paydex Score from 3 months ago.

Paydex Norm

The industry median or average Paydex score for the subject's line of business.

Parent / Headquarters Bankruptcy Element Group

Indicates if the business has a relationship to a Parent or Headquarters that entered into bankruptcy.

- **Parent Name in Bankruptcy** - Name of the parent company in bankruptcy proceedings.
- **Parent D-U-N-S Number in Bankruptcy** - D-U-N-S number of the parent in bankruptcy
- **Parent Bankruptcy Filing Counter** - Number of bankruptcy filings by a parent. Includes the Parent Bankruptcy Filing Type, Parent Bankruptcy Chapter Number, and Parent Bankruptcy Filing Date.
- **Parent Bankruptcy Filing Type** - The type of bankruptcy filed by the parent.
- **Parent Bankruptcy Chapter Number** - The chapter of bankruptcy filed by the parent.
- **Parent Bankruptcy Filing Date** - The date bankruptcy was filed by the parent (format YYYYMMDD).

- **Parent Bankruptcy Conversion Counter** - Number of the bankruptcy conversion by the parent. Includes Parent Bankruptcy Conversion Date and Parent Bankruptcy Chapter Conversion.
- **Parent Bankruptcy Conversion Date** - The date the bankruptcy was converted by the parent from one chapter type to another (format YYYYMMDD).
- **Parent Bankruptcy Chapter Conversion** - Change of bankruptcy type

Postal Code

Part of the physical address, the code identifying the geographic subsection of the city in which the business is located. Known as the ZIP code in the United States, post or postal code elsewhere.

Postal Town

The name of the town (according to the postal service) in which the business is located.

Primary SIC Code

Standard Industrial Classification code. The four-digit SIC code is an index which describes the function (manufacturer, wholesaler, retailer or service) and the line of business in which the company is engaged.

Principal Title and Name

Names and job titles of principal executives of case subject.

Registration Type

Type of registration. Field values are RTC/1 (cooperative), RTC/2 (federally chartered), RTC/3 (professional), RTC/4 (profit), RTC/5 (state chartered), RTC/6 (nonprofit).

Secured Filings Indicator

Indicates whether open secured filings such as US UCC filings, secured charges/mortgages pledgings, or equivalent exist for the business in D&B's database.

SIC Type

Version of SIC. Values are 1972 (used in Europe and Australia), 1977 (used in Canada), and 1987 (used in the US).

Slow Trade Explanation

Conditional comment generated when Paydex score is used or slow trade experiences are present.

Street

Address line of physical location. Will also contain, if available, building name and neighborhood in separate lines.

Suits/Judgments Indicator

Indicates whether open suits, judgment, petitions or payment remarks exist in the D&B database for the company.

Tangible Net Worth Element Group

The Tangible Net Worth field contains equity of the business after all liabilities have been deducted from assets and any intangible assets have been disregarded. The Tangible Net Worth Indicator qualifies the amount, indicating whether it is actual or estimated. In some databases, the indicators and value may be in the alphanumeric Tangible Net Worth Text field. In Australia, there may be a code G after the value meaning that the figure is taken from a consolidated or group financial statement that will include the financial results of the subject's affiliates or sister subsidiaries as well.

Telephone Number

The main telephone number of the business. Different countries may have telephone numbers of varied lengths which may or may not include the country or city access codes. Each country does have an access code (contained in the International Dialing Code field) which must be used when dialing cross-border into that country.

Total Employees Element Group

The figure contained in the Total Employees field indicates the number of persons employed by the subject. The Total Employees Composition Table indicates if the value from a particular country will include subsidiaries, branches, or divisions. Some databases also include the indicator fields that tell you if subsidiaries are included or whether the Total Employees value is:

- Estimated or actual
- Minimum, maximum, or average

In some databases, the indicators and value may be contained in a combined alphanumeric field. This type of data will be delivered in the Total Employees Text field. For example, in Australia, if a G appears after the number, it indicates that the figure is a group figure.

Total Payments

The total number of payment experiences contained in D&B's database for the subject company.

Trade Style, Alternate Name

Trade Styles are additional business names used by the company – also referred to as a DBA (doing business as) or AKA (also known as) names. In some jurisdictions, these names are shown to be registered to, and therefore owned by, a company. They are used to secure the name, advertise a particular product or to distinguish between different parts of the company's operations or divisions. These names are registered in the same way as a business or firm, with the responsible authority.

Year Started

The year that the organization actually commenced present operations. If the business was formed to acquire or continue the operations of a preexisting business, then the start date may reflect this original start date.

Financial Data Elements

Accounts Payable

Amount of merchandise purchased on credit and not paid for by the balance sheet date. Also known as Trade Creditors. In Italy, Accounts Payable include Cambiali Creditors where applicable.

Accounts Receivable

Amount of sales made and billed to customers on credit terms, but not yet paid. This is money owed by customers and not yet received. Also called Trade Debtors. The value may or may not be net of bad debts. In Italy, Accounts Receivable include Cambiali Debtors where applicable.

Audit Indicator

Indicates whether D&B has been able to determine whether the financial statement was prepared by audit. Not populated by all country databases. The Financial Statement Quality Table provides a description of the types/quality of financial statements loaded into various D&B country databases.

Cash and Liquid Assets

Amount of cash on hand and in banks and other liquid assets where available.

Consolidated indicator

Indicates whether statement is consolidated or not.

Cost of Sales

Cost of Sales (or Cost of Goods Sold where applicable) from the Profit & Loss or Income Statement.

Current Ratio

Current Assets divided by Current Liabilities. For Italy, the Current Ratio is calculated by *Total Current Assets – Stock Depreciation – Bad Debts* / *Total Current Liabilities*. For Belgium, the Current Ratio = *Total Current Assets* / (*Total Current Liabilities* + *Regularization Account*).

Dividends

Dividends paid to shareholders.

Estimated Indicator

Indicates whether the financial statement figures are estimated or actual. Not populated by all country databases.

Fiscal Indicator

Indicates whether the financial statement period is 12 months or not. Not populated by all country databases.

Final Indicator

Indicates if financial statement figures are the final closing statement for a business which has ceased trading. Not populated by all country databases.

Fixed Assets

Amount of tangible property owned by a business that has a life longer than one year such as buildings, equipment and land. Should be the net cost (original cost minus depreciation and revaluation).

Forecast Indicator

Indicates financial statement figures are future projections. Only present in Taiwan.

Gross Income

Amount left over after deducting the Cost of Goods sold from Net Sales. May be negative.

Income Statement Date

Date of Income or Profit & Loss Statement. Applies where no start or end dates are supplied.

Intangible Assets

Total of intangible assets (goodwill, patents, research and development, nonissued capital, organizational expenses). May or may not be net of depreciation or amortization.

Inventory

Includes merchandise on hand that is ready to be sold. May also include work in progress plus raw materials minus depreciation.

Long Term Debt

Long Term (Financial) Debt owed by the business. Includes categories such as minority interest, convertible debentures (over one year), debentures, mortgages, loans, hire purchases due after one year, and pension debt due to group companies or participants. Excludes categories such as provisions and allowances.

Net Income

Amount left over after all expenses and taxes are deducted. Also called Net Profit or Loss after Taxes.

Net Worth

Total amount of Equity (Net Worth). Includes capital stock, retained earnings treasury stock, and so on – is not the Tangible Net Worth. May be negative.

Opening Indicator

Indicates figures that are the opening statement for the business. Not populated by all country databases.

P & L from Date

Starting Date of Profit and Loss Statement.

P & L to Date

Ending Date of Profit and Loss Statement.

Previous Net Worth

Previous Net Worth minus intangibles. May be negative to reflect a deficit net tangible worth position.

Previous Sales

Net sales for previous period.

Previous Statement Date

Date of previous financial statement. May be full date, month and year, or year only.

Previous Working Capital

Working Capital (*Current Assets minus Current Liabilities*) for previous period. For Italy, Working Capital is calculated as follows: *Total Current Assets – Stock Depreciation – Bad Debts – Total Current Liabilities*. For Belgium, Working Capital is calculated as follows: *Total Current Assets – (Total Current Liabilities + Regularization Account)*.

Profit Before Tax

Profit before tax, will appear as a negative if value is a pre-tax loss.

Pro forma Indicator

Indicates the financial statement figures are pro forma. Typically used to represent the state of a company as a result of a pending structural change based on actual or known performance.

Qualified Indicator

Indicates auditors have made qualifying remarks about the fairness and accuracy of the figures.

Quick Ratio

Cash plus Accounts Receivable divided by Current Liabilities. For Italy, the Quick Ratio is calculated by: $(Total\ Current\ Assets - Stock\ Depreciation - Bad\ Debts - Stocks\ \&\ Work\ in\ Process) / Total\ Current\ Liabilities$. For Belgium, the Quick Ratio is calculated by: $Total\ Current\ Assets - (Receivables\ over\ 1\ year + Total\ Net\ Stocks\ \&\ Work\ in\ Process) / (Total\ Current\ Liabilities + Regularization\ Account)$. For France, Iberia and Germany, the Quick Ratio is calculated by: $(Total\ Current\ Assets - Stocks) / Current\ Liabilities$. The Quick Ratio is not available for the United Kingdom or Ireland.

Re-Stated Indicator

Indicates figures resubmitted after corrections to original statement for period.

Retained Earnings

Retained earnings.

Sales

Net sales for the period after returns, allowances, and discounts are deducted. In Europe, this is the Sales for the period less taxes.

Signed Indicator

Indicates if figures are signed by principals.

Statement Currency

Currency code of financial statement. Some databases are populated only if the Statement Currency Code is different than the default.

Statement Date

Date of current financial statement. May be full date, month and year, or year only.

Subsidiary

Indicates whether the subject business is a subsidiary. A value of Yes indicates that it is a Subsidiary. A value of No indicates that it is not a subsidiary.

Total Assets

Total amount of current and long-term assets.

Total Current Assets

Total amount of all current (less than one year) assets.

Total Current Liabilities

Total amount of all current (less than one year) liabilities.

Total Liabilities

Total liabilities owed by business.

Total Liabilities & Equity

Total amount of Liabilities & Equity.

Total Long Term Liabilities

Total long term (greater than one year) liabilities owed by business.

Trial Balance Indicator

Indicates that financial statement figures are trial balance.

Unbalanced Indicator

Indicates submitted balance sheet figures do not balance.

Rationalized Legacy Data

This appendix describes how to load legacy data into the TCA registry after the data has been rationalized by D&B.

Loading Rationalized Legacy Data

When you migrate from a legacy system to Oracle Applications, you might need to transfer legacy data into the TCA tables. If you want to cleanse your legacy data before loading the data into the TCA tables, you can use D&B rationalization services. You can then use the Load D&B Program to create new parties in the TCA tables for the rationalized legacy data and use the Customer Interface program to create customer accounts for those parties.

Note: Do not upload cleansed data from other third-party content providers when using this functionality.

To load rationalized legacy data:

1. Your system administrator compiles a list of the parties in your legacy system that you want D&B to rationalize. Each party in the list must include a unique identifier. This unique identifier maps to the Original System Reference field in the TCA tables.
2. Transfer your list to D&B. For more information, see *Transferring a Request List File to D&B* on page 4-19.
3. D&B compares the companies in your list with the companies in the D&B database and rationalizes the data on your list. After rationalizing your data, D&B sends three flat ASCII files back to you:
 - **First file** - Matched, unmatched, and duplicate records as well as information appended from D&B's database for each company
 - **Second file** - All the duplicate records, listed in order of DUNS number
 - **Third file** - Records that D&B could not find a DUNS number for
4. Use SQL*Loader to load data from the first flat file into the Party Interface table.

5. Run the Load D&B Data program to load the rationalized legacy data from the Party Interface table into the TCA tables. The Load D&B Data program creates parties in the TCA tables and maps the unique identifier that your system administrator identified in step 1 to the Original System Reference field. For more information, see Load D&B Data on page 4-20.
6. Run the Customer Interface program to associate legacy customer accounts with your newly created parties. The Customer Interface program matches customer accounts to parties using the Original System Reference field.

See also: Customer Interface, *Oracle Receivables User Guide*

Index

A

- Address entity
 - table, 2-27
 - tax location validation, 2-28
 - see also* Other entities
- API
 - mapping error correction, 4-22
 - mapping utility, 4-22
- Apps Servlet Agent profile option, A-2
- attribute groups
 - overview, 2-6
 - setup example, 2-24
- attributes
 - description, 1-2

B

- batch loading
 - data elements, 4-22
 - errors, 4-22
 - mapping data elements, 4-21
 - process overview, 4-16
 - request list, 4-17, 4-18, 4-19
 - STATUS values
 - E1, 4-22
 - E2, 4-22
 - N, 4-22
 - P1, 4-22
 - P2, 4-22
- BIR
 - See* Business Information Report
- BIR subtab, 5-6

- branch
 - outside North America, 4-21
- Business Information Report (BIR)
 - description, 3-6
 - purchasing, 4-8
- Business Verification subtab
 - Business Keys, 5-3
 - Demographics, 5-3
 - description, 5-3
 - Employee Statistics, 5-3

C

- Comparison tab, 5-7
- Concurrent Request tab, 2-36
- Contact Point entity, 2-27
 - see also* Other entities
- Credit Rating entity, 2-27
 - see also* Other entities
- Credit, Risk, and Financial Analysis subtab
 - Credit Management, 5-6
 - description, 5-6
 - Financial Reports, 5-6
- Customers - Quick window
 - purchasing D&B information, 4-15
- Customers - Standard window
 - purchasing D&B information, 4-15

D

- D&B
 - contract, 3-2
 - description, 3-2

- data elements
 - examples, 3-7
 - mapping batch load, 4-21
- data sources
 - attribute groups example, 2-24
 - Other entities example, 2-35
 - party profiles example, 2-20
 - setting up for Other entities, 2-29
 - setting up for party profile entities, 2-8
 - viewing information from, 5-2
- DNB Global Data Products Request report
 - description, 5-9
 - parameters, 5-9
- Dun and Bradstreet tab, 5-5
- DUNS numbers
 - definition, 3-7
 - Enquiry, 4-21
 - related parties, 4-21
- Duplicate DUNS report
 - description, 5-8
 - parameters, 5-8

E

- entities
 - description, 1-2

F

- Financial Report entity, 2-27
 - see also* Other entities

G

- Generate Request List for D&B Batch Load program
 - description, 4-17
 - parameters, 4-18
- German company information, 4-7
- Global Data Products (GDP)
 - Business Verification, 3-3
 - data elements displayed in tabs, 5-5
 - data elements in D&B database, 3-2
 - Decision Support, 3-5
 - Delinquency Score, 3-4
 - Enterprise Management, 3-5, 4-22

- Financial Standing, 3-4
- Global Failure Risk Score, 3-4
- Quick Check, 3-4

H

- HQ DUNS, 4-21
- HZ: Allow User to Update Third Party Data profile option, A-2
- HZ: D&B Password profile option, A-2
- HZ: D&B Policy Function Exists profile option, A-2
- HZ: D&B URL profile option, A-2
- HZ: D&B User Name profile option, A-2
- HZ: Display D&B Button in Customer Form profile option, A-3
- HZ: Third Party Data Integration Set Up for Organization Profile Entity profile option, A-3
- HZ: Third Party Data Integration Set Up for Person Profile Entity profile option, A-3
- HZ: User Data Creation Rule profile option, A-3
- HZ: User Overwrite Rule profile option, A-3
- HZ: Web Server Proxy Host Name profile option, A-3
- HZ: Web Server Proxy Password profile option, A-3
- HZ: Web Server Proxy Port profile option, A-3
- HZ: Web Server Proxy User Name profile option, A-4
- HZ_PARTY_INTERFACE table, 4-20

I

- identifying address, 4-15
- investigations
 - e-mail, 4-19
 - level of priority, 4-13
 - requesting, 4-12
 - see also* Business Information Report (BIR)

L

- legacy data, C-2
- Load D&B Data program
 - description, 4-20
 - parameters, 4-20

prerequisites, 4-20

M

Mapping API utility

error correction, 4-22
processes, 4-22

O

online purchasing

copying existing information, 4-11
overview, 4-2
purchase procedure, 4-8
requesting an investigation, 4-12
searching TCA registry, 4-4
searching the D&B database, 4-6

Oracle Trading Community Architecture

See TCA

Organization Profile entity

description, 1-2
see also party profile entities

Other entities

description, 1-2
setting up data sources, 2-29
setup example, 2-35
setup overview, 2-27
user data creation rules, 2-32

P

pages

Available Packages, 4-8
Dun and Bradstreet Search and Results, 4-6
Order an Investigation, 4-12
Party Search, 4-4
Set Up Data Sources, 2-8, 2-29
Set Up Third Party Overwrite Rule, 2-16
Set Up User Data Creation Rules, 2-32
Set Up User Overwrite Rules, 2-12

parties

description, 1-2
TCA registry, 1-2
party ID, 4-17

party profile entities

attribute groups, 2-6
description, 1-2
setting up data sources, 2-8
setup example, 2-20
setup overview, 2-5
third party overwrite rule, 2-16
user overwrite rules, 2-12

Person Profile entity

description, 1-2
see also party profile entities

profile options

access and defaults, A-4
Apps Servlet Agent, A-2
HZ: D&B Password, A-2
HZ: D&B Policy Function Exists, A-2
HZ: D&B URL, A-2
HZ: D&B User Name, A-2
HZ: Display D&B Button in Customer Form, A-3
HZ: Third Party Data Integration Set Up for Organization Profile Entity, A-3
HZ: Third Party Data Integration Set Up for Person Profile Entity, A-3
HZ: User Data Creation Rule, A-3
HZ: User Overwrite Rule, A-3
HZ: Web Server Proxy Host Name, A-3
HZ: Web Server Proxy Password, A-3
HZ: Web Server Proxy Port, A-3
HZ: Web Server Proxy User Name, A-4
settings, A-4

programs

Generate Request List for D&B Batch Load, 4-17
Load D&B Data, 4-20
Third Party Data Integration Update, 2-36
purchasing D&B information, 4-15
see also online purchasing

R

rationalized legacy data, C-2

related entities

batch load processing, 4-22

related parties

duplicate DUNS number, 4-21

Relationship entity, 2-27
see also Other entities
Relationships subtab, 5-6
reports
 DNB Global Data Products Request, 5-9
 Duplicate DUNS, 5-8

S

Set Up Data Sources pages
 Other entities, 2-29
 party profile entities, 2-8
Set Up Third Party Overwrite Rule page, 2-16
Set Up User Data Creation Rules pages, 2-32
Set Up User Overwrite Rules pages, 2-12
single source of truth record
 attribute groups, 2-6
 attribute groups example, 2-24
 data source setup, 2-8
 description, 1-2
 displaying and using data, 2-5
 example, 2-20
 regenerating, 2-36
 setting up, 2-5
 third party overwrite rule, 2-16
 user overwrite rules, 2-12
Special Events subtab, 5-3
SQL*Loader utility, 4-16
SST
 see single source of truth record
Standard Request Submission windows
 DNB Global Data Products Request report, 5-9
 Duplicate DUNS report, 5-8
 Generate Request List for D&B Batch Load
 program, 4-17
 Load D&B Data program, 4-20
 Third Party Data Integration Update
 program, 2-36
subtabs
 BIR, 5-6
 Business Verification, 5-3
 Credit, Risk, and Financial Analysis, 5-6
 Relationships, 5-6
 Special Events, 5-3
 Summary, 5-3

Summary subtab, 5-3

T

tabs
 Comparison, 5-7
 Concurrent Request, 2-36
 Dun and Bradstreet, 5-5
 User Entered, 5-4
TCA
 description, 1-2
TCA registry
 description, 1-2
Third Party Data Integration
 D&B, 3-2
 major features, 1-3
 overview, 1-2
 setting up, 2-2
Third Party Data Integration Update program
 description, 2-36
 parameters, 2-37
 prerequisite, 2-36
third party overwrite rule
 description, 2-16
 example, 2-22
 setting up, 2-16
Trading Community Architecture
 See TCA

U

user data creation rules
 description, 2-32
 example, 2-35
 setting up, 2-32
User Entered tab, 5-4
user overwrite rules
 attribute groups example, 2-25
 description, 2-12
 example, 2-21
 setting up, 2-12

W

windows

Customers - Quick, 4-15

Customers - Standard, 4-15

Standard Request Submission, 2-36, 4-17, 4-20,
5-8, 5-9

