Oracle® Customers Online

Implementation Guide

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Oracle Customers Online Implementation Guide, Release 12.2

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Oracle Customers Online Implementation Guide, Release 12.2

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
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If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Customers Online Implementation Guide.*

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

- The principles and customary practices of your business area.
- Computer desktop application usage and terminology.

If you have never used Oracle E-Business Suite, we suggest you attend one or more of the Oracle E-Business Suite training classes available through Oracle University.

See Related Information Sources on page viii for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

2 General Implementation

3 Feature-Specific Implementation

A Reports and Processes

This section lists the reports and processes that are seeded in Standard Request Submission for these responsibilities: Oracle Customers Online Superuser, Oracle Customer Data Librarian Superuser, and Oracle Customers Online Forms Access.

B Oracle Customer Online Profile Options and Profile Option Categories

Related 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 Customers Online.

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the Oracle E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.

- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available

on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

Guides Related to This Product

Oracle Common Application Calendar Implementation Guide

This guide describes how to define tasks and note types, set up task statuses and status transition rules, define task priorities, set up data security, and map notes and references to source objects such as a sales lead to Task Manager. In addition, it describes how to create users and run concurrent programs to retrieve new and updated tasks.

Oracle Common Application Calendar User Guide

Oracle Common Application Calendar enables you to manage daily tasks and appointments, create and maintain notes, and schedule resources. It provides a central place to store and view resource schedules, utilization, and availability. It also enables you to synchronize your calendar with external calendars such as Microsoft Outlook or handheld devices.

Oracle Customer Data Librarian Implementation Guide

Oracle Customer Data Librarian includes all of the functionality of Oracle Customers Online with the additional features of maintaining the quality of customer data. Therefore, you must first implement Oracle Customers Online fully. Then, use this guide to assign responsibilities and access to users and set the necessary profile options for data librarian deployment, data import, mapping, search and duplication removal, and data security.

Oracle Customer Data Librarian User Guide

Oracle Customer Data Librarian enables you to import customer information from external systems into the Oracle Trading Community Architecture Registry and manage the quality of this information. Quality includes data consolidation and completeness and the removal or merge of duplicate and unnecessary information. In addition, Oracle Customer Data Librarian contains all of the features in Oracle Customers Online,

including purchasing information from D&B to enrich your customer data and mapping customer records to their source systems.

Oracle Customers Online User Guide

Oracle Customers Online enables you to view, create, and maintain customer or party information, create customer relationships and hierarchies, manage tasks and employees for your organization, and use reports to view customer profile trends and data quality information. You can import customer data from external sources, and administer and control the usage of this data across the Oracle E-Business Suite.

Oracle Financials Concepts Guide

This guide discusses the conceptual architecture of Oracle Financials. It introduces you to the financial concepts used in the application, and helps you compare real world business, organization, and processes to those used in the applications. Understanding the concepts enables you to exploit the features of the Oracle Financials suite of applications for better financial performance, reporting, control, compliance, and security.

Oracle Financials Implementation Guide

This guide describes how to implement the Oracle Financials E-Business Suite. It takes you through the steps of setting up your organizations, including legal entities, and their accounting, using the Accounting Setup Manager. You can find information on intercompany accounting and sequencing of accounting entries with relevant examples.

Oracle General Ledger Implementation Guide

This guide provides information on how to implement Oracle General Ledger. Use this guide to understand the implementation steps required for application use, including how to set up Accounting Flexfields, Accounts, and Calendars.

Oracle HRMS Documentation Set

This set of guides explains how to define your employees, so you can give them operating unit and job assignments. It also explains how to set up an organization (operating unit). Even if you do not install Oracle HRMS, you can set up employees and organizations using Oracle HRMS windows. Specifically, the following manuals will help you set up employees and operating units:

- **Oracle HRMS Enterprise and Workforce Management Guide**

  This user guide explains how to set up and use enterprise modeling, organization management, and cost analysis.

- **Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide**

  Use this guide to find out about setting up employees and managing your people

resources.

Oracle Trading Community Architecture Administration Guide

This guide enables you to define entities in the TCA Registry, create relationships, search, prevent duplication, and control access. In addition, you can use this guide to define time zones and phone formats, configure adapters for the processing of data in the TCA Registry, define sources that provide data for specific entities, and create user-defined attributes to extend the registry. You can administer these TCA tools and features from the Administration tab using the Trading Community Manager responsibility. This tab is also available in Oracle Customers Online and Oracle Customer Data Librarian.

Oracle Trading Community Architecture Reference Guide

This guide provides information including a comprehensive glossary to supplement the documentation for Oracle Trading Community Architecture and to help you understand products in the Oracle Customer Data Management family. It describes customer interface tables and the interface tables used for bulk import of data from external sources, and D&B data elements. In addition, you can learn about available relationship types, available replacement words and attributes for Data Quality Management data, available matching rules for various TCA administration tasks, and the results and impact of the party and account merge processes initiated in Oracle E-Business Suite applications.

Oracle Trading Community Architecture Technical Implementation Guide

This guide provides technical information on the various integration features such as APIs and business events that you can avail to connect into external systems and transact data between these systems through a data hub using the Trading Community Architecture data model. This means that you can create or update in one system and ensure that the change is reflected in the other systems. You can manipulate data at the granular Oracle Trading Community Architecture entity level such as party site or party relationship or at the higher business object level such as person. Use this guide to learn about available APIs, their functions, parameters, and validations and how to use them. You can also find details on the business events and how to subscribe to them.

Oracle Trading Community Architecture User Guide

Oracle Trading Community Architecture (TCA) maintains information including relationships about parties, customers, organizations, and locations that belong to your commercial community in the TCA Registry. This guide enables you to use the features and user interfaces provided by TCA and by other Oracle E-Business Suite applications to view, create, and update Registry information. For example, you can import batches of party data in bulk from external source systems into the TCA Registry, merge duplicate parties, sites, and customer accounts, generate time zones for phones and locations, and run various customer reports.

Installation and System Administration

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite CRM System Administrator's Guide

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Approvals Management Implementation Guide

This guide describes transaction attributes, conditions, actions, and approver groups that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

Oracle Diagnostics Framework User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

Oracle E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle E-Business Suite Multiple Organizations Implementation Guide

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operating units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

Oracle e-Commerce Gateway Implementation Guide

This guide describes implementation details, highlighting additional setup steps needed for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

Oracle e-Commerce Gateway User's Guide

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

Oracle iSetup User's Guide

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

Oracle Product Hub Implementation Guide

This guide explains how to set up hierarchies of items using catalogs and catalog categories and then to create user-defined attributes to capture all of the detailed information (such as cost information) about an object (such as an item or change order). It also explains how to set up optional features used in specific business cases; choose which features meet your business' needs. Finally, the guide explains the set up steps required to link to third party and legacy applications, then synchronize and enrich the data in a master product information repository.

Oracle Product Hub User's Guide

This guide explains how to centrally manage item information across an enterprise, focusing on product data consolidation and quality. The item information managed includes item attributes, categorization, organizations, suppliers, multilevel structures/bills of material, packaging, changes, attachments, and reporting.

Oracle Web Applications Desktop Integrator Implementation and Administration Guide

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing workflow processes embedded in Oracle E-Business Suite. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle E-Business Suite users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle XML Gateway User's Guide

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

Oracle XML Publisher Administration and Developer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing Oracle E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions. This guide is available through the Oracle E-Business Suite online help.

Oracle XML Publisher Report Designer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts. This guide is available through the Oracle E-Business Suite online help.

Training and Support

Training

Oracle offers a complete set of training courses to help you master your product 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.

You have a choice of educational environments. You can attend courses offered by Oracle University at any of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may

want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep your product 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 Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

1

License for Oracle Customer Hub B2B and Oracle Customer Hub B2C

This chapter covers the following topics:

- License

License

Oracle Customer Hub B2B:

The Customer Hub B2B is a bundle that includes two components, Siebel Universal Customer Master B2B and Oracle Customer Data Hub.

If you are licensed for Customer Hub B2B then your use of the bundled programs is as defined in your license order.

If you are licensed for Siebel Universal Customer Master B2B then your use is limited to the component that you are licensed for and you do not have rights to use the Oracle Customer Data Hub.

If you are licensed for Oracle Customer Data Hub then your use is limited to the component that you are licensed for and you do not have rights to use the Siebel Universal Customer Master B2B.

Oracle Customer Hub B2C:

The Customer Hub B2C is a bundle that includes two components, Siebel Universal Customer Master B2C and Oracle Customer Data Hub.

If you are licensed for Customer Hub B2C then your use of the bundled programs is as defined in your license order.

If you are licensed for Siebel Universal Customer Master B2C then your use is limited to the component that you are licensed for and you do not have rights to use the Oracle Customer Data Hub.

If you are licensed for Oracle Customer Data Hub then your use is limited to the component that you are licensed for and you do not have rights to use the Siebel Universal Customer Master B2C.

D&B Data Integration Toolkit

This Oracle software product includes D&B Data Integration Toolkit software from Dun & Bradstreet, Inc. (D&B). However, you do NOT receive a license to use the D&B software under your agreement with Oracle. The D&B software must be separately licensed from D&B.

To purchase a license to the D&B Data Integration Toolkit software and/or D&B information about businesses, you must have a separate contract with D&B for the Toolkit and/or its Data Rationalization Service, as applicable. Contact your D&B relationship manager to contract for the software or 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, 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.

2

General Implementation

This chapter covers the following topics:

- Overview
- General Implementation Steps
- Setting Up Prerequisite Applications
- Creating Employees
- Importing Employees
- Setting Up Employees as Users
- Compiling Flexfields
- Setting Up Periodic Programs
- Verifying Implementation

Overview

Oracle Customers Online (OCO) lets users view, create, and manage their customer data.

The application is:

- Based on the data model and functionality of Oracle Trading Community Architecture (TCA).
- Part of the Oracle Customer Data Management (CDM) product family.

For reference material that supplements not only TCA but Customers Online implementation, see: *Oracle Trading Community Architecture Reference Guide*.

Aside from specific implementation for Customers Online, you can also use the Administration tab to administer functionality that affects not only OCO but all Oracle e-Business Suite applications that use TCA. See: Introduction to Administration, *Oracle Trading Community Architecture Administration Guide*.

Note: To use the Administration tab, you must have the Oracle Customers Online Superuser responsibility.

Related Topics

Oracle Customers Online User Guide

Dependencies, page 2-2

General Implementation Steps, page 2-3

Feature-Specific Implementation Overview, page 3-1

Dependencies

Oracle Customers Online includes features or data from other applications in the Oracle E-Business Suite.

Mandatory Dependencies

This table shows mandatory dependencies, listing the related application and the features or data in Oracle Customers Online that depend on that application.

Oracle Application	Features or Data in Oracle Customers Online
Oracle Common Application Calendar	Calendar, Tasks, and Notes subtabs in Other tab, as well as notes and tasks for organizations, persons, and contacts
Oracle Customer Interaction History	Interactions
Oracle GraphBuilder (Visualization tool)	Relationships visualization
Oracle Trading Community Architecture	Administration tab, data model (including classifications and relationships), Data Quality Management, D&B integration, Source System Management
Resource Manager (Oracle Trading Community Architecture	Employees subtab in Other tab

Optional Dependencies

This table shows optional dependencies, listing the related application and the features

or data in Customers Online that depend on that application.

Oracle Application	Features or Data in Oracle Customers Online
Oracle Advanced Collections	Delinquencies and broken promises
Oracle Credit Management	Credit summaries
Oracle Customer Data Librarian	Duplicate identification (marking duplicate organizations and persons for merge) and certification
Oracle Install Base	Installed base
Oracle Leads Management	Leads
Oracle Marketing	Campaigns and events
Oracle Order Management	Orders and returns
Oracle Quoting	Quotes
Oracle Receivables	Accounts, credit items, and debit items
Oracle Sales and Oracle TeleSales	Opportunities
Oracle TeleService	Service requests

Related Topics

Overview, page 2-1

General Implementation Steps

Note: Use the Oracle Customers Online Superuser responsibility for general implementation steps, unless stated otherwise.

General implementation of Oracle Customers Online includes:

1. Setting Up Prerequisite Applications, page 2-4.
2. Creating Employees, page 2-5.

3. Setting Up Employees as Users, page 2-6.
4. Compiling Flexfields, page 2-8.
5. Setting Up Periodic Programs, page 2-8.
6. Profile Options and Profile Option Categories Overview, page B-1.
7. Verifying Implementation, page 2-9.

Related Topics

Overview, page 2-1

Setting Up Prerequisite Applications

This section provides a high level outline of the applications and some of the options that must be set up before you implement Customers Online. This section does not provide detailed information and instructions about how to set up Oracle applications. You must refer to the appropriate online help and documentation for each application.

To Set Up Prerequisite Applications for a Fresh Installation of Customers Online:

1. Add the following required responsibilities, if they are not already available.
   - Purchasing Super User
   - General Ledger Super User
   - Inventory
2. Log in using the General Ledger Super User responsibility.
   1. Set up accounting key flexfields.
   2. Set up currencies.
   3. Set up the calendar.
   4. Set up the set of books.

   See: General Ledger Setup Steps, *Oracle General Ledger Implementation Guide*.
3. Log in using an HR user responsibility and define the organization structures. See: Organization Structures, *Oracle Human Resource Management Systems Implementation Guide*.

4. Log in using the System Administrator responsibility. Set up the system profiles MO: Operating Unit and GL Set of Books Name. See: Profile Options in Oracle Application Object Library, *Oracle E-Business Suite Setup Guide*.

5. Run the AD Admin utility. Select the option to convert the organization structure to multi-org.

   Caution: After this utility runs, you cannot select this option in the future.

6. Log in to Oracle Receivables and set up the Sales Tax Location Flexfield. See: Define Sales Tax Location Flexfield Structure, *Oracle Receivables Implementation Guide*.

7. Log in to Oracle Inventory and set up this application, as necessary, to meet your requirements. See: Setting Up, *Oracle Inventory User's Guide*.

8. Log in using the Order Management Super User responsibility. Set up the Item Validation Organization parameter. See: Item Validation Organization, *Oracle Order Management Implementation Manual*.

Related Topics

Overview, page 2-1

Creating Employees

You must create the individuals who will be using Customers Online as employees before you can set them up as users. You can also import employees. See: Importing Employees, page 2-6.

To Create Employees with Full Oracle Human Resources (HRMS) Installation:

Responsibility: US HRMS Manager

See: People Management Overview *and* Entering a New Person (People Window), *Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide*.

1. Click New.

2. When defining a new person in the People window, make sure that you enter *Employee* in the Category field for that person.

Without Full Oracle HRMS Installation:

Responsibility: CRM Resource Manager

See: Entering Employees Window, *Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide*.

Related Topics

Overview, page 2-1

Importing Employees

Use this procedure to import employees from Oracle HRMS. For users to view the Calendar and Employees subtabs, among other things, each employee must be imported and then created as a resource.

Prerequisites

❒ Set up the employees in Oracle HRMS.

To Import Employees:

Responsibility: CRM Resource Manager

See: Importing Individual Resources, *Oracle Trading Community Architecture Administration Guide*.

> **Note:** In the Selection Criterion window, make sure to select the *Employee* resource category.

Related Topics

Creating Employees, page 2-5

Setting Up Employees as Users

Set up individual employees as users of Oracle Customers Online, including assigning responsibilities to the users. These responsibilities are available for Customers Online users:

- **Oracle Customers Online User:** A general user of OCO.
- **Oracle Customers Online Superuser:** Generally considered the equivalent of a system administrator. All areas of the site are accessible.

- **Oracle Customers Online Forms Access:** Access to Party Merge, Customer Account Merge, and Oracle Customers Online lookups. Other included features are Data Quality Management setup and D&B integration, which users can also access from the Oracle Customers Online Superuser responsibility. You should assign the Oracle Customers Online Forms Access responsibility to all users who are assigned Oracle Customers Online Superuser.

- **TCA Data Security Administrator:** Administration privileges for Data Sharing and Security (DSS). Assign this responsibility along with Oracle Customers Online Superuser to users who need to administer DSS.

This table describes the menus and access available to each responsibility.

Responsibility	Menu	Access	Menu Exclusion
Oracle Customers Online User	IMC_NG_ROOT_MENU	Customers, Reports, Import (with File Load subtab only), and Other tabs	Administration and Data Quality tabs, and Batch Import subtab under Import tab
Oracle Customers Online Superuser	IMC_NG_ROOT_MENU	Customers, Reports, Import (with File Load subtab only), Administration, and Other tabs	Data Quality tab and Batch Import subtab under Import tab
Oracle Customers Online Forms Access	IMC Data Librarian Merge Root Menu	Party Merge, Data Quality Management, Account Merge, Dun & Bradstreet, Requests, Oracle Customers Online lookups	None
TCA Data Security Administrator	HZ Security Main Menu	View, create, update, and delete privileges for Data Sharing and Security administration	None

Note: The Oracle Customer Data Librarian and Oracle Customer Data Librarian Superuser responsibilities are for Oracle Customer Data Librarian. See: Assigning Responsibilities to Users, *Oracle Customer Data Librarian Implementation Guide*.

To Set Up Employees as Oracle Customers Online Users:

Responsibility: System Administrator

See: *Oracle E-Business Suite Setup Guide*.

> **Tip:** Assign the Oracle Customers Online Forms Access responsibility to any user who is assigned the Oracle Customers Online Superuser responsibility.

Related Topics

Overview, page 2-1

Compiling Flexfields

You must freeze and compile all flexfields after installation of Customers Online is complete.

To Compile Flexfields:

Responsibility: Application Developer

See: Defining Key Flexfields *and* Defining Descriptive Flexfields, *Oracle Applications Flexfields Guide*.

Setting Up Periodic Programs

Set up these programs to automatically run at a frequency of your choice.

- These two programs process customer information that is then available to be used when Customers Online reports are requested. Choose a frequency setting based on how often and how much your customer information changes. You can set different schedules for profile and quality reports, based on your business needs.
  - **IMC: Refresh Summary Information for Reports:** Processes customer information for profile reports.
  - **IMC: Refresh Summary Information for Quality Reports:** Processes customer information for quality reports.

  See: Overview of Reports, *Oracle Customers Online User Guide*.

- **Refresh of Classification Denormalization:** Runs a complete data refresh to populate the HZ_CLASS_CODE_DENORM denormalization table. See: Refresh of Classification Denormalization, *Oracle Trading Community Architecture Administration Guide*.

- These programs affect the employees feature in the Other tab.
  - **Flatten Employee Hierarchy**
  - **Flatten group hierarchy**
  - **Synchronize Employees**

  See: Resource Manager Concurrent Programs, *Oracle Trading Community Architecture Administration Guide*.

- **Rebuilding Intermedia Index for Task Names:** This program affects tasks in the Customers and Other tabs. See: Running the Task Manager Concurrent Program, *Oracle Common Application Calendar Implementation Guide*.

- **Synchronize JTF_NOTES_TL_C1 index:** This program affects notes in the Customers and Other tabs.

To Set Up Periodic Programs:

See: Running Reports and Programs, *Oracle E-Business Suite 's Guide*.

Related Topics

Overview, page 2-1

Verifying Implementation

Verify your implementation by logging in for the first time and looking at the application.

To Verify Implementation:

1. Enter a new password.
2. Click Update.
3. Verify your default responsibility.
4. Click Update.
5. Log out of the application.
6. Log in again using your new password.
7. Check to see if the Other tab appears.

Related Topics

Overview, page 2-1

3

Feature-Specific Implementation

This chapter covers the following topics:

- Feature-Specific Implementation Overview
- Setting Up Accounts
- Setting Up Address Formatting
- Setting Up Duplicate Prevention
- Setting Up Extended Attributes
- Setting Up Import
- Setting Up Real-Time Address Validation
- Setting Up Relationships
- Setting Up Searches
- Setting Up Source System Management
- Setting Up Third Party Data Integration
- Extending Transactions Viewer to Non-Oracle Applications

Feature-Specific Implementation Overview

Oracle Customers Online (OCO) provides many features for users to view and manage customer information. The setup and administration for many of these features are available from the Administration tab.

> **Note:** To use the Administration tab, you must have the Oracle Customers Online Superuser responsibility.

The setup for some of these Customers Online features involves setting up and administering Data Quality Management (DQM). The DQM setup and functionality, for example the staged schema, are shared across all affected features. See: Data Quality

Management Overview, *Oracle Trading Community Architecture Administration Guide*.

You can set up these features, which are included in or directly affect Customers Online:

- **Accounts:** Set up for accounts and account details. See: Setting Up Accounts, page 3-4.

- **Addresses:** Set up for creating and updating addresses. See: Setting Up Address Formatting, page 3-5 and Setting Up Real-Time Address Validation, page 3-13.

- **Bookmarked Lists:** See:
  - Customers Online Deployment, page B-4
  - Bookmarked Lists, *Oracle Customers Online User Guide*

- **Certification:** Set up display of certification levels in organization search results and overview. See:
  - Customers Online Setup, page B-9
  - Searching for Organizations or Persons *and* Overview, *Oracle Customers Online User Guide*

    Note: Set up certification level display only if you also use Oracle Customer Data Librarian.

- **Classifications:** Create and manage the class categories and codes that users can use to classify their customers. See: Administering Classifications, *Oracle Trading Community Architecture Administration Guide*.

- **Data Sharing and Security (DSS):** Assign the TCA Data Security Administrator responsibility to those who need access to administer DSS. DSS administrators control the access privileges of users to create, update, or delete data in Customers Online. See:
  - Setting Up Employees as Users, page 2-6
  - Administering Data Sharing and Security, *Oracle Trading Community Architecture Administration Guide*

- **Duplicate Identification:** Set up for users to mark duplicate organizations or persons for merge. Set up duplicate identification only if you have Oracle Customer Data Librarian. See:
  - Customers Online Setup, page B-9

    - Marking Duplicate Organizations or Persons, *Oracle Customers Online User Guide*.

- **Duplicate Prevention:** Set up duplicate prevention to warn users if the organization or person that they are creating is a potential duplicate of existing records. See: Setting Up Duplicate Prevention, page 3-6.

- **Extended Attributes:** Set up custom attributes that users can view and update. See: Setting Up Extended Attributes, page 3-11.

- **Import:** Set up for import of customer data. See: Setting Up Import, page 3-12.

- **Recent Items:** See:

    - Customers Online Deployment, page B-4

    - Recent Items, *Oracle Customers Online User Guide*

- **Relationships:** Manage the relationship types and roles that users can use to create relationships, including contact relationships. See: Setting Up Relationships, page 3-16.

- **Reports:** See:

    - Setting Up Periodic Programs, page 2-8

    - Customers Online Setup, page B-9

    - Overview of Reports, *Oracle Customers Online User Guide*

- **Searches:** Set up the searches in the Dashboard, Organizations, and Person pages with Data Quality Management. See: Setting Up Searches, page 3-18.

- **Source System Management (SSM):** Set up for users to map organization, person, and contact records to the source systems that the records originated from. See: Setting Up Source System Management, page 3-19.

- **Third Party Data Integration:** Set up for users to purchase information from D&B about customers of type Organization. See: Setting Up Third Party Data Integration, page 3-20.

- **Transactions:** Set up the Transactions viewer for third party applications. See: Extending Transactions Viewer to Non-Oracle Applications, page 3-20.

> **Note:** All feature-specific implementation steps are performed with the Oracle Customers Online Superuser responsibility, unless specified

otherwise. Set profile options with the System Administrator responsibility.

Setting Up Accounts

Your account setup determines the type of information users can enter when they create or update accounts and account details. You can also make credit summaries available for them to view, for accounts or account sites.

To Set Up Accounts:

1. **Responsibility:** Trading Community Manager or Receivables Manager

   Set up and compile descriptive flexfields to provide custom attributes for maintaining accounts and account details. This table shows the flexfields to set up and where the flexfield segments would be available to the user.

Flexfield Title	Flexfield Name	Accounts Functionality
Address Information	RA_ADDRESSES_HZ	Create and update account sites
Contact Information	RA_CONTACTS_HZ	Create and update account contacts and account site contacts
Contact Role Information	RA_CONTACT_ROLES_HZ	Create and update account contacts and account site contacts
Customer Information	RA_CUSTOMERS_HZ	Create and update accounts

   See: Descriptive Flexfield Segments Window, *Oracle E-Business Suite Flexfields Guide*.

2. **Responsibility:** Receivables Manager

   Set up system options in Oracle Receivables.

   - **Automatic Customer Numbering:** If you select this option, then users cannot edit account numbers when they update accounts.
   - **Automatic Site Numbering:** If you select this option, then users cannot enter or update locations for account site business purposes.

   See: Transactions and Customers System Options, *Oracle Receivables Implementation*

Guide.

3. **Responsibility:** Credit Management Super User

   Optionally set up and process credit reviews, for users to view credit summaries of accounts or account sites. Perform this step for either the account or account site level. See: Processing Credit Reviews, *Oracle Credit Management User Guide*.

Related Topics

Accounts, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 3-1

Setting Up Address Formatting

Set up Flexible Address Formatting (FAF) for creating or updating addresses. Address formats determine which and how fields are displayed. You can use the same format for multiple countries, but each country can use only one format. You can also optionally create custom formats and set up lists of values to validate specific fields. See: Address Formatting, *Oracle Trading Community Architecture User Guide*.

> **Tip:** For additional validation on entered addresses, set up real-time address validation. See: Setting Up Real-Time Address Validation, page 3-13.

To Set Up Address Formats:

Responsibility: System Administrator (Step 1 to 2) and Receivables Manager (Step 3)

1. Aside from using seeded address formats, optionally create custom address formats. See: Creating Custom Address Styles, *Oracle Receivables Implementation Guide*.

   > **Tip:** In seeded formats, you can hide fields that you do not want to display and use.

2. Optionally set up validation for specific fields. See: Defining Flexible Address Validation, *Oracle Receivables Implementation Guide*.

3. Assign address formats to countries. See: Assigning an Address Style to a Country, *Oracle Receivables Implementation Guide*.

4. Set profile options:

   - HZ: Default Flexible Address Format

- ICX: Territory

Related Topics

Customers Online Deployment, page B-4

Creating and Updating Addresses, *Oracle Customers Online User Guide*

Flexible Addresses, *Oracle Receivables Implementation Guide*.

Feature-Specific Implementation Overview, page 3-1

Setting Up Duplicate Prevention

Set up duplicate prevention to warn users if the organization, person, or contact that they are creating is a potential duplicate of existing records, and provide options for resolving the issue.

Duplicate prevention uses Data Quality Management (DQM), which provides powerful matching functionality, based on match rules that determine which attributes to consider for identifying duplicates and how to score the results. You can use seeded match rules or create new rules.

To Set Up Duplicate Prevention:

1. Set up Data Quality Management. See: Administering Data Quality Management, *Oracle Trading Community Architecture Administration Guide*. Make sure to:

   - Run the DQM Staging program to create the staged schema.
   - Periodically run the DQM Synchronization program to update the staged schema.
   - Compile all match rules that you plan to use.

   Optionally create your own match rules, with the Search purpose, for organization, person, or contact duplicate prevention.

   - You can create one match rule each for organization, person, and contact duplicate prevention, or create one for organization and another for both person and contact.

     Note: When the user enters an organization as part of creating a person, duplicate prevention is applied to that organization value using the organization duplicate prevention match rule set for the HZ: Match Rule for Organization Duplicate Prevention profile option. The person duplicate prevention

match rule is applied to all other values that users enter to create a person. When creating your match rules, keep in mind that person duplicate prevention involves both match rules, and that the organization duplicate prevention match rule is used not only when users create an organization, but also in the above situation.

- Use only attributes that correspond to user-entered values that you want to base duplicate prevention on. These tables describe the DQM attributes you can include in match rules for preventing duplicate organizations, persons, or contacts.

Attributes for Organization Duplicate Prevention

Field That Users Enter to Create Organization	Entity	DQM Attribute Name
Address 1	Address	Address 1
Address 2	Address	Address 2
Address 3	Address	Address 3
Address 4	Address	Address 4
Alias	Party	Known As 1
City	Address	City
Concatenated Phone Number (not an actual separate field to enter)	Contact Point	• Phone Number Flexible Format • Raw Phone Number
Country	Address	Country
County	Address	County
Customer Category (available via personalization)	Party	Category Code

Field That Users Enter to Create Organization	Entity	DQM Attribute Name
D-U-N-S Number	Party	D-U-N-S Number
Income Taxpayer ID (available via personalization)	Party	JGZZ Fiscal Code
Mail Stop (available via personalization)	Address	Mailstop
Org Name Pronunciation	Party	Phonetic Representation of Organization Name
Organization Name	Party	• Party Name • Organization Name • Concatenated Party Names
Phone Area Code	Contact Point	Phone Area Code
Phone Country Code	Contact Point	Phone Country Code
Phone Ext	Contact Point	Phone Extension
Phone Number	Contact Point	Phone Number
Postal Code	Address	Postal Code
State	Address	State
Tax Registration Num (available via personalization)	Party	Tax Reference
URL	Contact Point	Web Site

Attributes for Person or Contact Duplicate Prevention

Field That Users Enter to Create Person or Contact	Entity	DQM Attribute Name
Address 1	Address	Address 1
Address 2	Address	Address 2
Address 3	Address	Address 3
Address 4	Address	Address 4
City	Address	City
Concatenated Name (not an actual separate field to enter)	Party	• Party Name • Person Name • Concatenated Party Names
Concatenated Phone Number (not an actual separate field to enter)	Contact Point	• Phone Number Flexible Format • Raw Phone Number
Country	Address	Country
County	Address	County
Customer Category (available via personalization)	Party	Category Code
E-Mail	Contact Point	E-Mail Address
First Name	Party	Person First Name
Job Title	Contact	Job Title

Field That Users Enter to Create Person or Contact	Entity	DQM Attribute Name
Last Name	Party	Person Last Name
Mail Stop (available via personalization)	Address	Mailstop
Middle Name	Party	Person Middle Name
Phone Area Code	Contact Point	Phone Area Code
Phone Country Code	Contact Point	Phone Country Code
Phone Ext	Contact Point	Phone Extension
Phone Number	Contact Point	Phone Number
Postal Code	Address	Postal Code
Prefix	Party	Person Pre-Name Adjunct
State	Address	State
Suffix	Party	Person Name Suffix

- When defining match rule thresholds, remember that a record's score must meet or exceed the match threshold to be considered a potential duplicate.

  Note: The override threshold and the HZ: Duplicate Allowed profile option do not apply to duplicate prevention in Customers Online.

2. Assign search match rules to these profile options, for organization, person, or contact duplicate prevention. You can also keep the match rules that are defaults for the profile options.
   - HZ: Match Rule for Organization Duplicate Prevention
   - HZ: Match Rule for Person Duplicate Prevention
   - HZ: Match Rule for Contact Duplicate Prevention

3. Set the HZ: Enable Duplicate Prevention at Party Creation profile option to enable duplicate prevention for organizations, persons, or both. The setting for persons also apply to contacts.

Related Topics

Customers Online Setup, page B-9

Preventing Duplicate Organizations, Persons, or Contacts, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 3-1

Setting Up Extended Attributes

Set up extensions to provide custom attributes to display and use in the application. Specific UI pages would have an Additional Attributes option, from which users can select the extended attributes to view and update.

You create groups of attributes, with optional functions for user actions, and associate each group with an entity. You then assign attribute groups to a defined page. A page can contain multiple attribute groups, with the same associated entity, to display as an UI component. The entity determines where in the application the page is used.

For example, you create three attribute groups for organization profiles. You assign two of the groups to page A and the other to page B. When users are in the Overview page for organizations, they can select either page A or B from the Additional Attributes option, and access the assigned attribute groups accordingly.

This table shows the entities you can assign attribute groups to and the application pages they would be available in.

Entity	Application Page
Organization Profiles (HZ_ORGANIZATION_PROFILES)	For organizations only: • Overview • Profile
Party Sites (HZ_PARTY_SITES)	• Create Address • Update Address

Entity	Application Page
Person Profiles (HZ_PERSON_PROFILES)	For persons and contacts only: • Overview • Profile

To Set Up Extended Attributes:

See: Administering Extensions, *Oracle Trading Community Architecture Administration Guide*.

Related Topics

Overview, *Oracle Customers Online User Guide*

Profile, *Oracle Customers Online User Guide*

Creating and Updating Addresses, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 3-1

Setting Up Import

In Customers Online, users can import data from external sources by:

1. Loading CSV files of data into the import interface tables.
2. Automatically transferring the data from interface tables to the TCA Registry after the CSV file load successfully completes. This automatic import process follows the same steps as when the Import Batch to TCA Registry program is submitted. See: Import Process, *Oracle Trading Community Architecture User Guide*.

The automatic import is optional, and the user has no control over that process. Users manually submit a CSV file load, and when the load succeeds, that data is transferred to the Registry based on your setup, without any notification to the user. If you do not set up automatic import, users can finish the import process with Oracle Trading Community Architecture or Oracle Customer Data Librarian.

To Set Up Automatic Import:

1. Set up as you would for TCA Bulk Import. See: Setting Up Bulk Import, *Oracle Trading Community Architecture Administration Guide*.
2. Set the IMC: Automate CSV File Load into TCA profile option to *Yes*.

3. Set these profile options if you want to run any of the optional preimport processes.
   - Batch de-duplication
     - IMC: Run CSV Batch De-Duplication
     - IMC: CSV Batch De-Duplication Match Rule
     - IMC: CSV Batch De-Duplication Action
   - Address validation
     - IMC: Run CSV Batch Address Validation
   - Registry de-duplication
     - IMC: Run CSV Batch Registry Match
     - IMC: CSV Batch Registry Match Rule

Related Topics

Customers Online File Load Setup, page B-6

Import Overview, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 3-1

Setting Up Real-Time Address Validation

Real-time address validation validates addresses during address entry. See: Real-Time Address Validation, *Oracle Trading Community Architecture User Guide*.

You can validate addresses in real time using two distinct repositories:

1. TCA Geography Hierarchy setup
2. Third party address validation adapter database

> **Note:** The TCA Geography Hierarchy setup does not validate Address Line 1, Address Line 2, Address Line 3 and Address Line 4.

If validation is performed using both the above repositories, the TCA Geography Hierarchy setup takes precedence for the common attributes set up in the two repositories. For example, if the City attribute is set up in the TCA Geography Hierarchy setup and the Third Party Address Validation Adapter database, then the City in the TCA Geography Hierarchy setup takes precedence.

To get more information, see: Administering Geography Hierarchy, *Oracle Trading Community Architecture Administration Guide*.

Real time address validation performed using a third party adapter in the Address CPUI component is based on the settings in the HZ: Enable Real Time Address Validation profile. If the value is set to Yes, you can verify the address during entry. For more information on profile options , see Address Validation Deployment Category, *Oracle Trading Community Architecture Administration Guide*. For more information on setting up Adapters, see Adapters, *Oracle Trading Community Architecture Administration Guide*.

Real-time address validation can work alongside Flexible Address Formatting (FAF), if both are set up. If you do not need to use validation for a country, then you can set up and use only Flexible Address Formatting. See: Flexible Addresses, *Oracle Receivables Implementation Guide*. Likewise, you can set up real-time address validation without setting up and using FAF.

> **Note:** Before setting up real-time address validation, verify that valid location data exists from your data sources such as Receivables, a content provider, or manual data entry.

Synchronizing FAF and Geography Mapping

When setting up Flexible Address Formatting and real-time address validation, make sure they are consistent with your Geography Hierarchy setup.

- Geography types in your defined country structure must match the address elements in the Flexible Address Formatting address style assigned to that country. For example, if the US country structure has City, State, and Country, then the address style assigned to United States should also have those address elements. See: Defining Country Structures, *Oracle Trading Community Architecture Administration Guide*.

- Geographies that you define for this country must match any value sets defined for address elements in the address style, if the geography type is mapped to the address element for that style. For example, for the US address style, the State address element is mapped to the State geography type. If this address style has a defined list of states for the State address element, then do not define a different set of states for the State geography type. See: Viewing and Defining Geographies, *Oracle Trading Community Architecture Administration Guide* and Managing Validations, *Oracle Trading Community Architecture Administration Guide*.

- (Recommended but optional) Address elements defined as mandatory in the address style should be mapped for geography validation. For example, if State is defined as a mandatory element in the US address style, then map the State geography type to the HZ_LOCATIONS source table and select the Geography Validation usage. See: Managing Validations, *Oracle Trading Community Architecture*

Administration Guide.

See: Address Formatting, *Oracle Trading Community Architecture User Guide*.

Procedure:

Note: Perform these steps for each country that you need to validate addresses for.

1. Set up the country structure in Geography Hierarchy. This structure determines the available geography types, which corresponds to address elements, for address validation. See: Defining Country Structures, *Oracle Trading Community Architecture Administration Guide*.

2. Define geographies for each geography type in the country structure. Address values are validated against the defined geographies. See: Defining Geographies, *Oracle Trading Community Architecture Administration Guide* and Updating Geographies, *Oracle Trading Community Architecture Administration Guide*.

   Note: If an address has values that you defined as alternate geography names or codes, those values are still valid, but the primary name or code is saved and subsequently displayed to the user.

3. Select HZ_LOCATIONS as the table to map the country structure against. This initial setup is not for a specific address style, so you see No Style.

4. Map each geography type in the country structure to the appropriate HZ_LOCATIONS column and select the Geography Validation usage. This mapping and usage assignment determine the address elements that must be entered and valid for the address to be considered valid. See: Managing Validations, *Oracle Trading Community Architecture Administration Guide*.

5. Specify the address, or geography, validation level for the country. See: Managing Validations, *Oracle Trading Community Architecture Administration Guide*.

6. After you set up validations for No Style, and if you have a Flexible Address Formatting address style assigned to this country, then optionally repeat steps 4 and 5 with the FAF address style selected.

   Important: If changes are later made to the Flexible Address Formatting address style assigned to this country, then you should make equivalent changes to your mapping and usage assignments for that address style, if defined.

See: Managing Validations, *Oracle Trading Community Architecture Administration Guide*.

7. Set up profile options.
   - HZ: Address Validation Level for Application - to set different address validation levels by applications, if needed.
   - HZ: Batch Size for committing records in Geography Name Referencing process.
   - HZ: Maintain Location History.
   - HZ: Number of workers for a given Geography Name Referencing request.
   - HZ: Reference Territory - to set the default territory (country) used to determine the locale for name and address formatting.
   - HZ: Default Flexible Address Format - to set the default style for address entry when no flexible address format is defined for a country.
   - HZ: Default Address Style - to set the default format for address display.
8. Run the Geography Name Referencing process to map addresses in location tables to master reference geographies. See: Geography Name Referencing Process, *Oracle Trading Community Architecture Administration Guide*.

Related Topics

Geography Hierarchy Overview, *Oracle Trading Community Architecture Administration Guide*

Setting Up Relationships

In Customers Online, users create and manage relationships among the organizations and persons in their trading community. Customers Online includes a specific group of contact relationships, with persons as contacts, employees, or members of organizations. All other relationships, which are not in this group of contact relationships, are managed in the Other relationships feature.

Any hierarchical relationship can also be viewed and managed with the hierarchies feature.

To Set Up Relationships:

1. Create and manage the relationship types, phrases, and roles that relationships among your customers are based on. Customers Online displays only phrases, not

roles. See: Administering Relationships, *Oracle Trading Community Architecture Administration Guide*.

The relationship phrase pairs you create will not appear in all relationship lists of values in Customers Online. For example, if you create a relationship phrase pair with Organization as the subject and object type, the phrase would not be available if the user is creating a relationship for a person.

2. Assign seeded or custom-defined relationship phrases to be used in Customers Online to an appropriate relationship group. Relationship phrases are not available to the user unless assigned to a relationship group. See: Assigning Relationship Phrases and Roles to Relationship Groups, *Oracle Trading Community Architecture Administration Guide*.

   - **Party Contacts:** Relationship phrases assigned to the Party Contacts group are used for contact relationships. This group is already seeded with some phrases, but you can assign other phrases, seeded or custom, to be used for contact relationships.

     In features for both persons and contacts, the user can switch between managing information for the person and for the person in a contact relationship role. For example, you add Representative as a contact relationship phrase, and the user creates relationships with Joe as an employee of Vision Corporation and as a representative for Elcaro Corporation. In the overview page, the user can switch among viewing information for Joe the person, Joe as a representative, and Joe as an employee. See: Contacts Overview, *Oracle Customers Online User Guide*.

   - Relationship phrases assigned to all relationship groups other than Party Contacts are used for Other relationships. These other groups are not seeded with phrases, so you must assign any seeded or custom relationship phrases that you want to use for Other relationships.

3. Set the HZ: Allow Hierarchy Copy profile option to allow or prevent copying of relationship hierarchies. See:

   - Copying Hierarchies, *Oracle Customers Online User Guide*.

Related Topics

Customers Online Setup, page B-9

Contact Relationships, *Oracle Customers Online User Guide*

Other Relationships, *Oracle Customers Online User Guide*

Hierarchies Overview, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 3-1

Setting Up Searches

The Dashboard page in Customers Online provides simple and advanced searches for both organizations and persons. The Organizations page provides the same searches for organizations, and the Person page for persons.

For all these searches, you can set up Data Quality Management (DQM) to:

- Control the available search criteria.
- Improve the flexibility and performance of the search.

DQM provides powerful search functionality, based on match rules that determine which search criteria are available and how to select and rank the results. You can use seeded search match rules or create new rules.

If you do not set up DQM, Customers Online provides a basic set of search criteria and uses standard search functionality.

To Set Up Searches:

1. Set up Data Quality Management. See: Administering Data Quality Management, *Oracle Trading Community Architecture Administration Guide*. Make sure to:

   - Run the DQM Staging program to create the staged schema.
   - Periodically run the DQM Synchronization program to update the staged schema.
   - Compile all match rules that you plan to use.

   Optionally create your own match rules, with the Search purpose. The acquisition and scoring attributes would be the available search criteria. With match rule sets, the superset of all attributes in the set is the search criteria.

   > **Caution:** Do not include the Organization Name attribute in match rules that you create for searching for persons in Customers Online.

   If attributes are assigned a display order, they are presented as two columns of search criteria, from left to right, then top to bottom. For example, you have six attributes assigned 1 through 6. Attribute 1 and 2 would be in the first row of the two columns, from left to right, then attributes 3 and 4 from left to right in the next row, and attributes 5 and 6 in the last row.

   When defining match rule thresholds, remember that a record's score must meet or exceed the match threshold to be displayed in the search results.

2. Assign search match rules to these profile options, for any of the searches you want

to set up with DQM. You can also keep the match rules that are defaults for the profile options.

- HZ: Match Rule for Organization Advanced Search
- HZ: Match Rule for Organization Simple Search
- HZ: Match Rule for Person Advanced Search
- HZ: Match Rule for Person Simple Search

3. Set the HZ: Enable DQM Party Search profile option to *Yes*. Only the searches that you provided a match rule for in the previous step are enabled.

Related Topics

Customers Online Setup, page B-9

Dashboard Page, *Oracle Customers Online User Guide*

Searching for Organizations or Persons, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 3-1

Setting Up Source System Management

For any organization or person record that originated from a third party, legacy, or other external data source, the user can use Customers Online to map the record to that system or just view the mapping.

To Set Up Source System Management:

1. Define the source systems that are actively providing data to organizations and persons, so that users can map specific organizations and persons to the records' source systems.

   Control how source system and user-entered data are displayed, created, and overwritten. If you set up Single Source of Truth (SST), Customers Online would use and display the SST record.

   See: Administering Source System Management, *Oracle Trading Community Architecture Administration Guide*.

2. Set the HZ: Source System Mapping Access profile option to determine user access for source system mapping.

Related Topics

Customers Online Setup, page B-9

Source Systems, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 3-1

Setting Up Third Party Data Integration

Customers Online lets users enrich information for customers of type Organization by purchasing data from D&B.

To Set Up Third Party Data Integration:

1. Integrate Customers Online with D&B. See: Setting Up Third Party Data Integration, *Oracle Trading Community Architecture Administration Guide*.

2. Set the HZ: Allow Access to D&B Online Purchase profile option to enable D&B purchasing for users.

Related Topics

Customers Online Setup, page B-9

Setting Up Source System Management, page 3-19

Searching for Organizations or Persons, *Oracle Customers Online User Guide*

Overview, *Oracle Customers Online User Guide*

Introduction to D&B, *Oracle Trading Community Architecture User Guide*

Feature-Specific Implementation Overview, page 3-1

Extending Transactions Viewer to Non-Oracle Applications

You can extend your view of transactions in Oracle Customers Online to include transaction data from applications that are not part of E-Business Suite applications to provide a complete view into all customer business transactions in your organization.

How the transactions viewer works:

When you open the Transactions page, the transactions viewer engine reads metadata queries from supporting views and tables to create dynamic view objects for each transaction type. The view objects retrieve the data for the transaction type and display it on the Transactions page.

The transactions viewer metadata model consists of several tables that store information for customer transaction types. At runtime, the transactions viewer engine retrieves and displays transactions for each customer by running the queries stored in the metadata model.

You can extend the transactions viewer metadata model by using queries that:

- Identify customers from page context.
- Identify customers using page context and existing external source system queries.

For more information on how to extend the transactions viewer and update metadata, including sample code, table and view descriptions, see *Oracle Customer Data Hub Implementation Concepts and Strategies White Paper* My Oracle Support Document 312811.1.

Related Topics

Transactions, *Oracle Customers Online User Guide*

A

Reports and Processes

This section lists the reports and processes that are seeded in Standard Request Submission for these responsibilities: Oracle Customers Online Superuser, Oracle Customer Data Librarian Superuser, and Oracle Customers Online Forms Access.

Some reports and programs can be submitted in multiple ways, but these descriptions are for running them from Standard Request Submission.

Reports

D&B Global Data Products Request Report

Provides details about the D&B information purchased within a specified date range. See: D&B Global Data Products Request Report, *Oracle Trading Community Architecture User Guide*.

Processes

Copy Relationship Type and All Relationships

Copies relationship types and, optionally, corresponding relationships. See: Copying Relationship Types, *Oracle Trading Community Architecture Administration Guide*.

Copy Organization Extensions Data for Profile Versioning

Copies organization profile extensions data and creates new extensions records for new organization profile versions. See: Copying Extensions Data for Profile Versioning, *Oracle Trading Community Architecture Administration Guide*.

Copy Person Extensions Data for Profile Versioning

Copies person profile extensions data and creates new extensions records for new person profile versions. See: Copying Extensions Data for Profile Versioning, *Oracle*

Trading Community Architecture Administration Guide.

DQM Compile All Rules

Compiles all DQM match rules. See: DQM Compile All Rules Program, *Oracle Trading Community Architecture Administration Guide*.

DQM Index Optimization Program

Optimizes *inter*Media indexes in the DQM staged schema. See: DQM Index Optimization Program, *Oracle Trading Community Architecture Administration Guide*.

DQM Staging Program

Creates or updates the DQM staged schema. See: DQM Staging Program, *Oracle Trading Community Architecture Administration Guide*.

DQM Synchronization Program

Synchronizes the DQM staged schema with the TCA Registry. See: DQM Synchronization Program, *Oracle Trading Community Architecture Administration Guide*.

Flatten Employee Hierarchy

Affects the employees feature in the Other tab. See: Resource Manager Concurrent Programs, *Oracle Trading Community Architecture Administration Guide*.

Flatten Group Hierarchy

Affects the employees feature in the Other tab. See: Resource Manager Concurrent Programs, *Oracle Trading Community Architecture Administration Guide*.

Generate Key for Fuzzy Match

Generates keys for fuzzy search.

Generate Request List for D&B Batch Load

Generates a list of parties that you want to purchase and batch load D&B information for. See: Generate Request List for D&B Batch Load, *Oracle Trading Community Architecture User Guide*.

Generate Time Zone for Locations

Creates or updates time zone information for locations. See: Generate Time Zone for Locations, *Oracle Trading Community Architecture User Guide*.

Generate Time Zone for Phone Numbers

Creates or updates time zone information for phone numbers. See: Generate Time Zone for Phone Numbers, *Oracle Trading Community Architecture User Guide*.

IMC: Refresh Summary Information for Quality Reports

Refreshes the information available for customer quality reports. See: Setting Up Periodic Programs, page 2-8.

IMC: Refresh Summary Information for Reports

Refreshes the information available for customer profile reports. See: Setting Up Periodic Programs, page 2-8.

Load D&B Data (8i Implementation)

Loads D&B information that was purchased online and corrected due to errors. See: Load D&B Data, *Oracle Trading Community Architecture User Guide*.

Rebuilding Intermedia Index for Task Names

Affects tasks in the Customers and Other tabs. See: Running the Task Manager Concurrent Program, *Oracle Common Application Calendar Implementation Guide*.

Refresh of Classification Denormalization

Populates and refreshes the HZ_CLASS_CODE_DENORM denormalization table. See: Refresh of Classification Denormalization, *Oracle Trading Community Architecture Administration Guide*.

Source System – Migrate Party Level Source System References

Migrates source system information. See: Administering Source System Management, *Oracle Trading Community Architecture Administration Guide*.

Synchronize Employees

Affects the employees feature in the Other tab. See: Resource Manager Concurrent Programs, *Oracle Trading Community Architecture Administration Guide*.

Synchronize JTF_NOTES_TL_C1 index

Affects notes in the Customers and Other tabs.

Third Party Data Integration Update

Regenerates the Single Source of Truth record. See: Third Party Data Integration Update Program, *Oracle Trading Community Architecture Administration Guide*.

B

Oracle Customer Online Profile Options and Profile Option Categories

This appendix covers the following topics:

- Profile Options and Profile Option Categories Overview
- Profile Option Category and Profile Options Descriptions

Profile Options and Profile Option Categories Overview

During implementation, set a value for each Oracle Customer Online profile option to specify how Customer Online controls access to and processes data.

See: *Oracle E-Business Suite Setup Guide.*

The prefixes in the profile option name indicate the application that the profile belongs to:

- **IMC:** Oracle Customers Online
- **HZ:** Oracle Trading Community Architecture
- **ICX:** Oracle Self-Service Web Applications

Many of the profile options in Oracle Trading Community Architecture are applicable to Customers Online, especially for features in the Administration tab. See: Profile Options and Profile Option Categories Overview, *Oracle Trading Community Architecture Administration Guide*.

Profile options are grouped into one or more profile option categories enabling you to view only the profile options that pertain to your application or function.

Customer Online Categories

- Customers Online Deployment, page B-4

Customer Online Profile Options

- IMC: CSV Batch Registry Match Rule, page B-8
- IMC: Enable Manage Reports, page B-13
- IMC: Limit on Number of Recently Created Records to Show by Date, page B-6
- IMC: Maximum Number of Contact Bookmarks, page B-6
- IMC: Maximum Number of Organization Bookmarks, page B-6
- IMC: Maximum Number of People Bookmarks, page B-6
- IMC: Maximum Number of Recent Items Displayed, page B-6
- IMC: Method for Defining "Recently Created", page B-6
- IMC: Profile for User Access, page B-14
- IMC: Run CSV Batch Address Validation, page B-8
- IMC: Run CSV Batch De-Duplication, page B-8
- IMC: Run CSV Batch Registry Match, page B-8
- IMC: Visualization Solution Type, page B-6

To Set Profile Options:

Responsibility: System Administrator

> **Important:** Some profile options are set with a match rule. Make sure that all seeded or custom match rules you assign to profile options are compiled. See: Compiling Match Rules, *Oracle Trading Community Architecture Administration Guide*.

Profile Option Category and Profile Options Descriptions

This section describes profile options by category.

The tables in this section provide profile option information as follows:

- The Default column displays either the default profile option value in italics, or No Default if none exists.
- The User Access column indicates whether you can view or update the profile option.

- The System Administration: Site, Application, Responsibility, and User columns indicate at which levels the system administrator can update these profile options.

The key for each 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.

Customers Online Deployment Category

The table below lists the profile options that are used for Customers Online deployment.

Customers Online Deployment Category

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
HZ: Default Flexible Address Format, page B-5	Update	Update	Update	Update	Update	Update
HZ: Validate US Addresses, page B-6	Update	Update	Update	Update	Update	Update
IMC: "Recently Created" Value Definition, page B-6	Update	Update	Update	Update	Update	Update
IMC: Limit on Number of Recently Created Records to Show by Date, page B-6	Update	Update	Update	Update	Update	Update

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
IMC: Maximum Number of Contact Bookmarks, page B-6	Update	Update	Update	Update	Update	Update
IMC: Maximum Number of Organization Bookmarks, page B-6	Update	Update	Update	Update	Update	Update
IMC: Maximum Number of People Bookmarks, page B-6	Update	Update	Update	Update	Update	Update
IMC: Maximum Number of Recent Items Displayed, page B-6	Update	Update	Update	Update	Update	Update
IMC: Method for Defining "Recently Created", page B-6	Update	Update	Update	Update	Update	Update
IMC: Visualization Solution Type, page B-6	Update	Update	Update	Update	Update	Update

HZ: Default Flexible Address Format

For flexfield-based address formatting, determine the default format to use, if no format is assigned to the selected country.

HZ: Validate US Addresses

Specify the tax and geography validation for addresses for common party.

IMC: "Recently Created" Value Definition

Set the viewing options for recently created value definitions.

IMC: Limit on Number of Recently Created Records to Show by Date

Specify the limit on the number of recently created records separated by date.

IMC: Maximum Number of Contact Bookmarks

Specify the maximum number of contact bookmarks allowed for each user.

IMC: Maximum Number of Organization Bookmarks

Specify the maximum number of organization bookmarks allowed for each user.

IMC: Maximum Number of People Bookmarks

Specify the maximum number of people bookmarks allowed for each user.

IMC: Maximum Number of Recent Items Displayed

Determine the maximum number of recent items to be displayed in the Recent Items bin in the Customers and Other tabs of Oracle Customers Online.

IMC: Method for Defining "Recently Created"

Specify the method for defining recently created items.

IMC: Visualization Solution Type

Specify the visualization solution type.

Related Topics

Setting Up Addresses, page 3-5

Creating and Updating Addresses, *Oracle Customers Online User Guide*

Recent Items, *Oracle Customers Online User Guide*

Bookmarked Lists, *Oracle Customers Online User Guide*

Customers Online File Load Setup Category

The table below lists the profile options that are used for setup of file loading process.

Customers Online File Load Setup Category

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
IMC: Automate CSV File Load into TCA, page B-7	Update	Update	Update	Update	Update	Update
IMC: CSV Batch De-Duplication Action, page B-8	Update	Update	Update	Update	Update	Update
IMC: CSV Batch De-Duplication Match Rule, page B-8	Update	Update	Update	Update	Update	Update
IMC: CSV Batch Registry Match Rule, page B-8	Update	Update	Update	Update	Update	Update
IMC: Run CSV Batch Address Validation, page B-8	Update	Update	Update	Update	Update	Update
IMC: Run CSV Batch De-Duplication, page B-8	Update	Update	Update	Update	Update	Update
IMC: Run CSV Batch Registry Match, page B-8	Update	Update	Update	Update	Update	Update

IMC: Automate CSV File Load into TCA

Specify whether or not to enable automatic import from the interface tables into the

TCA Registry after file loading is successfully completed. Leaving this profile option blank is the same as setting it to *No*.

IMC: CSV Batch De-Duplication Action

If the IMC: Automate CSV File Load into TCA, page B-7 and IMC: Run CSV Batch De-Duplication, page B-8 profile options are set to *Yes*, then you can optionally specify how to resolve duplicates found with batch de-duplication. The specified action would be taken on the batch before the data is imported into the TCA Registry.

IMC: CSV Batch De-Duplication Match Rule

If the IMC: Automate CSV File Load into TCA, page B-7 and IMC: Run CSV Batch De-Duplication, page B-8 profile options are set to *Yes*, then you must specify the match rule to use for the batch de-duplication process. Only match rules with Bulk Duplicate Identification purpose are used for batch de-duplication.

IMC: CSV Batch Registry Match Rule

If the IMC: Automate CSV File Load into TCA, page B-7 and IMC: Run CSV Batch Registry Match, page B-8 profile options are set to *Yes*, then you must specify the match rule to use for the Registry de-duplication process. Only match rules with Bulk Duplicate Identification purpose are used for Registry de-duplication. You can select the same match rule as for batch de-duplication.

IMC: Run CSV Batch Address Validation

If the IMC: Automate CSV File Load into TCA, page B-7 profile option is set to *Yes*, you can specify if you want to run address validation on the batch that is automatically imported. Leaving this profile option blank is the same as setting it to *No*.

IMC: Run CSV Batch De-Duplication

If the IMC: Automate CSV File Load into TCA, page B-7 profile option is set to *Yes*, you can specify if you want to identify and resolve duplicates within the batch that is automatically imported. Leaving this profile option blank is the same as setting it to *No*.

IMC: Run CSV Batch Registry Match

If the IMC: Automate CSV File Load into TCA, page B-7 profile option is set to *Yes*, you can specify if you want to run de-duplication between the batch that is automatically imported and the TCA Registry. Leaving this profile option blank is the same as setting it to *No*. Use this profile option to indicate whether or not to run registry de-duplication for a CSV batch.

Related Topics

Setting Up Import, page 3-12

Import Overview, *Oracle Customers Online User Guide*

Customers Online Setup Category

The table below lists the profile options that are used for the setup process.

Customers Online Setup Category

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
HZ: Allow Access to D&B Online Purchase, page B-11	Update	Update	Update	Update	Update	Update
HZ: Allow Access to Submit Merge Requests, page B-11	Update	Update	Update	Update	Update	Update
HZ: Allow Hierarchy Copy, page B-11	Update	Update	Update	Update	Update	Update
HZ: Default Phone Number Purpose, page B-11	Update	Update	Update	Update	Update	Update
HZ: Display Certification Level, page B-12	Update	Update	Update	Update	Update	Update
HZ: Enable DQM Party Search, page B-12	Update	Update	Update	Update	Update	Update

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
HZ: Enable Duplicate Prevention at Party Creation, page B-12	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Contact Duplicate Prevention, page B-12	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Organization Advanced Search, page B-12	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Organization Duplicate Prevention, page B-12	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Organization Simple Search, page B-13	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Person Advanced Search, page B-13	Update	Update	Update	Update	Update	Update

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
HZ: Match Rule for Person Duplicate Prevention, page B-13	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Person Simple Search, page B-13	Update	Update	Update	Update	Update	Update
HZ: Source System Mapping Access, page B-13	No Access	View Only	Update	Update	Update	View Only
IMC: Enable Manage Reports, page B-13	Update	Update	Update	Update	Update	Update

HZ: Allow Access to D&B Online Purchase

Specify whether users can access D&B purchase or not. Set this profile option to *Yes* only if you have a contract with D&B and have completed the integration with D&B.

HZ: Allow Access to Submit Merge Requests

Determine if users can mark potential duplicate organizations or persons to submit as a merge request to Oracle Customer Data Librarian. Set this profile option to *Yes* only if you have Oracle Customer Data Librarian.

HZ: Allow Hierarchy Copy

Determine whether or not copying of relationship hierarchies is allowed.

HZ: Default Phone Number Purpose

Specify the default purpose for phone numbers and other similar contact point types such as fax and mobile. Even though the purpose is not displayed in the user interface, you can still set the default.

HZ: Display Certification Level

Specify whether or not the certification level is displayed in the user interface. This profile option setting applies to all Oracle e-Business Suite applications that are using the TCA certification feature.

HZ: Enable DQM Party Search

Determine whether Data Quality Management is enabled for organization and person searches. Set this profile option to *Yes* only if you provide a match rule for at least one of the following profile options.

- HZ: Match Rule for Organization Advanced Search, page B-12
- HZ: Match Rule for Organization Simple Search, page B-13
- HZ: Match Rule for Person Advanced Search, page B-13
- HZ: Match Rule for Person Simple Search, page B-13

DQM search is enabled only for searches that has an assigned match rule.

HZ: Enable Duplicate Prevention at Party Creation

Determine if duplicate prevention is enabled for organizations, persons, both, or neither. The setting for persons also applies to contacts. You can enable for organizations, or persons and contacts, only if you provide match rules for the appropriate profile options below for organizations or both persons and contacts.

HZ: Match Rule for Contact Duplicate Prevention

Specify the seeded or user-defined match rule for identifying potential duplicates of the contact that the user is creating. Use match rules with the Search purpose. The profile option defaults to the seeded match rule SAMPLE: SEARCH. See: SAMPLE: SEARCH, *Oracle Trading Community Architecture Reference Guide*.

HZ: Match Rule for Organization Advanced Search

Specify the seeded or user-defined match rule for determining the search criteria and results for the organization advanced search. Use match rules with the Search purpose. The profile option defaults to the seeded match rule HZ_ORG_ADV_SEARCH_RULE. See: HZ_ORG_ADV_SEARCH_RULE, *Oracle Trading Community Architecture Reference Guide*.

HZ: Match Rule for Organization Duplicate Prevention

Specify the seeded or user-defined match rule for identifying potential duplicates of the organization that the user is creating. Use match rules with the Search purpose. The profile option defaults to the seeded match rule SAMPLE: SEARCH. See: SAMPLE:

SEARCH, *Oracle Trading Community Architecture Reference Guide*.

HZ: Match Rule for Organization Simple Search

Specify the seeded or user-defined match rule for determining the search criteria and results for the organization simple search. Use match rules with the Search purpose. The profile option defaults to the seeded match rule HZ_ORG_SIMPLE_SEARCH_RULE. See: HZ_ORG_SIMPLE_SEARCH_RULE, *Oracle Trading Community Architecture Reference Guide*.

HZ: Match Rule for Person Advanced Search

Specify the seeded or user-defined match rule for determining the search criteria and results for the person advanced search. Use match rules with the Search purpose, but do not use a match rule that has the Organization Name attribute. The profile option defaults to the seeded match rule HZ_PERSON_ADVANCED_SEARCH_MATCH_RULE. See: HZ_PERSON_ADVANCED_SEARCH_MATCH_RULE, *Oracle Trading Community Architecture Reference Guide*.

HZ: Match Rule for Person Duplicate Prevention

Specify the seeded or user-defined match rule for identifying potential duplicates of the person that the user is creating. Use match rules with the Search purpose. The profile option defaults to the seeded match rule SAMPLE: SEARCH. See: SAMPLE: SEARCH, *Oracle Trading Community Architecture Reference Guide*.

HZ: Match Rule for Person Simple Search

Specify the seeded or user-defined match rule for determining the search criteria and results for the person simple search. Use match rules with the Search purpose, but do not use a match rule that has the Organization Name attribute. The profile option defaults to the seeded match rule HZ_PERSON_SIMPLE_SEARCH_RULE. See: HZ_PERSON_SIMPLE_SEARCH_RULE, *Oracle Trading Community Architecture Reference Guide*.

HZ: Source System Mapping Access

Specify the type of access for source system mapping. You must set the general user responsibilities to *View Only*, and the superuser responsibilities to *Create and Update*. If a value is not specified, it is set to the default value of *No Access*.

IMC: Enable Manage Reports

Determine access privileges to manage Data Completeness reports. You should set this profile option to *Yes* for superuser responsibilities, and *No* for general user responsibilities.

Related Topics

Marking Duplicate Organizations or Persons, *Oracle Customers Online User Guide*

Setting Up Duplicate Prevention, page 3-6.

Preventing Duplicate Organizations, Persons, or Contacts, *Oracle Customers Online User Guide*

Setting Up Relationships, page 3-16

Copying Hierarchies, *Oracle Customers Online User Guide*

Managing Data Completeness Reports, *Oracle Customers Online User Guide*

Setting Up Searches, page 3-18

Dashboard Page, *Oracle Customers Online User Guide*

Searching for Organizations or Persons, *Oracle Customers Online User Guide*

Setting Up Source System Management, page 3-19

Source Systems, *Oracle Customers Online User Guide*

Setting Up Third Party Data Integration, page 3-20

Overview, *Oracle Customers Online User Guide*

Customers Online Security Category

The table below lists the profile options that are used for security.

Customers Online Security Category

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
IMC: Profile for User Access, page B-14	Update	Update	Update	Update	Update	Update

IMC: Profile for User Access

Determine whether or not to enable the user access feature.

Unused or Internal Profile Options

These profile options are either internally used by Oracle Customers Online or not used at all. You should not modify their settings in any way.

- IMC: Limit on Number of Recently Created Records to show by Date
- IMC: Method for Defining "Recently Created"
- IMC: Profile for User Access
- IMC: "Recently Created" Value Definition
- IMC: Visualization Solution Type

Note: The HZ: Default Party Type profile option setting has no affect on this application.

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