Oracle® Trading Community Architecture

Administration User Guide

Release 11*i*

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Oracle Trading Community Architecture Administration User Guide, Release 11*i*

Part No. B10854-01

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Preface

Welcome to Release 11*i* of the *Oracle Trading Community Architecture Administration User Guide*.

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

- The principles and customary practices of your business area.
- Oracle Trading Community Architecture.

  If you have never used Oracle Trading Community Architecture Administration, Oracle suggests you attend one or more of the Oracle Applications training classes available through Oracle University.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

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

How To Use This Guide

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

- Chapter 1 provides an overview of Oracle Trading Community Architecture Administration.
- Chapter 2 describes setting up for relationships, including creating relationship types, adding new relationship phrase and role pairs to existing types, and assigning phrase and role pairs to relationship groups.
- Chapter 3 describes administering classifications, including creating and updating class categories and codes.
- Chapter 4 describes setting up Third Party Data Integration, including integrating with D&B, setting up the single source of truth (SST) record, and defining data sources and rules for Party Profile and Other entities.
- Chapter 5 describes administering Data Sharing and Security, including creating, updating, and viewing data sharing groups as well as assigning access privileges.
- Appendix A lists the profile options that affect the operation of Oracle Trading Community Architecture Administration.
- A glossary provides definitions of terms specific to Oracle Trading Community Architecture Administration that are used in this guide.

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Other Information Sources

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

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

Online Documentation

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

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

Related Guides

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

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

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

Guides Related to All Products

Oracle Applications User's Guide

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

Guides Related to This Product

Oracle Trading Community Architecture Third Party Data Integration User Guide

User this user guide to learn how to manage and acquire third party information in the TCA Registry. The user guide describes acquiring third party data from D&B.

Oracle Trading Community Architecture Relationship Manager User Guide

Use this user guide to learn how to manage relationships among existing parties in the TCA Registry. You can view, create, and edit relationships, as well as view hierarchical relationships in a structural hierarchy.

Oracle Trading Community Architecture Data Quality Management User Guide

Use this user guide to learn how to set up Data Quality Management for powerful search, match, and duplicate identification functionality that Oracle applications can implement and leverage. The Oracle Trading Community Architecture Data Quality Management User Guide describes how to set up and use transformation functions and match rules to identify possible duplicate parties.

Oracle Trading Community Architecture Party Merge User Guide

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

Oracle Trading Community Architecture API User Notes

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

Oracle Customers Online Implementation Guide

Use this user guide to learn how to implement Oracle Customers Online (OCO), which solves the 3 C's of customer data management: 1) consolidation, 2) cleanliness, and 3) completeness. From OCO, you can access the Administration features.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Oracle Applications Implementation Wizard User Guide

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

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Applications Product Update Notes

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

Oracle Workflow Guide

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

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Oracle Applications Message Manual

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

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Trading Community Architecture Administration 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 one 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 Oracle Trading Community Architecture Administration 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 Oracle8*i* server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Your Feedback

Thank you for using Oracle Trading Community Architecture Administration and this user guide.

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

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1

Overview

This chapter provides an overview of Oracle Trading Community Architecture Administration.

Introduction

Oracle Trading Community Architecture (TCA) Administration provides a single access to the setup and administration functionality for various TCA features. The Administration tab is not for implementation, but rather the setup and maintenance of TCA entities, functionalities, or concepts that are used throughout the Oracle E-Business Suite.

TCA is a model for maintaining complex information about the parties and customers who belong to your commercial community, including organizations, locations, and the network of hierarchical relationships among them. Parties are entities of type Person, Organization, or Group that can enter into business relationships. The TCA Registry is the single source of trading community information for all Oracle E-Business Suite applications. Administration allows you to control the data in the Registry to best fit your business needs.

Each subtab under the Administration tab contains specific administration functionality:

- **Relationships** - Set up the relationship types that can be used to create relationships among entities in the TCA Registry. See Administering Relationships on page 2-2.
- **Classifications** - Set up the class categories and codes that can be used to classify entities in the TCA Registry. See Administering Classifications on page 3-5.
- **DQM** - Set up Data Quality Management (DQM), which provides powerful search and duplicate identification functionality.

  See also: Setting Up and Using Data Quality Management (Steps 1 through 5), *Oracle Trading Community Architecture Data Quality Management User Guide*

- **Enrichment** - Set up Third Party Data Integration to control the usage and display of third party data along with user-entered information in the TCA Registry. You also set up your integration with D&B. See Administering Third Party Data Integration on page 4-2.
- **Security** - Set up data sharing groups and control how specific entities in the TCA Registry can be accessed depending on user and responsibility privileges. See Administering Data Sharing and Security on page 5-3.

Setting Up Administration

You can access the Administration tab as a whole, with all available subtabs, from the Trading Community Manager and OCO Super User responsibilities. To restrict and manage access to the Administration features, you can assign specific Administration subtabs to other responsibilities.

> **See also:** Implementing Function Security, *Oracle Applications System Administrator's Guide*

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Relationships

This chapter describes setting up for creating and using relationships:

- Creating relationship types.
- Adding relationship phrase and role pairs to existing types.
- Assigning relationship phrases and roles to relationship groups.

Administering Relationships

Use the Relationships subtab in Oracle Trading Community Architecture Administration to set up relationship types and relationship phrase and role pairs that can be used to create relationships among entities in the TCA Registry. These relationships are shared throughout the Oracle E-Business Suite.

> **See also:** Relationships Overview, *Oracle Trading Community Architecture Relationship Manager User Guide*

Oracle Trading Community Architecture provides seeded relationship types and phrase and role pairs, but you can create new ones as needed.

The Relationships subtab lets you:

- Create relationship types, including a relationship phrase and role pair for each new type, on page 2-10.
- Add phrase and role pairs to existing seeded or user-created relationship types, on page 2-7.

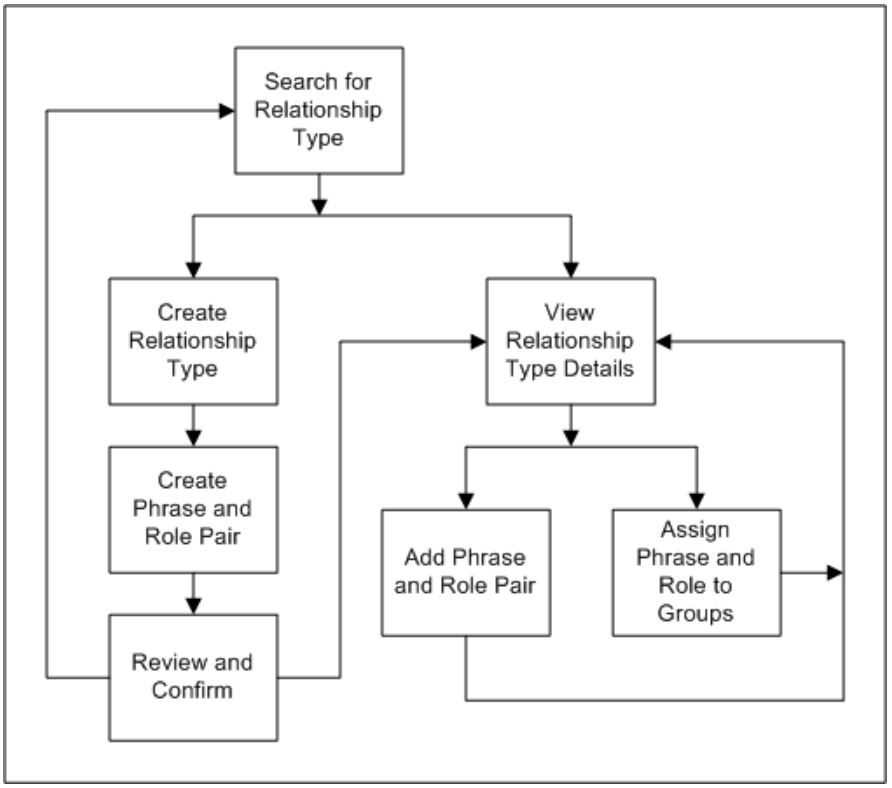
> **Note:** You cannot update the definition of existing relationship types. You can only add phrase and role pairs to them.

- Assign phrase and role pairs to relationship groups, on page 2-9.

For an overview of Administration, see Introduction on page 1-2.

Administration Process

This diagram describes the process flow of setting up relationship types as well as phrase and role pairs.



1. Search for a relationship type that you want to view or add a role and phrase pair to, or to make sure that the relationship type you want to create does not already exist. See Searching for Relationship Types on page 2-5.
2. If you do not see the relationship type that you want in the search results, you can create a new type. Otherwise, select a relationship type from the results and view its details. See Viewing Relationship Types on page 2-6.
3. If you are creating a new relationship type, you:
   a. Define and create the relationship type.
   b. Create a relationship phrase and role pair for the relationship type.

c. Review and confirm your definitions.

d. Return to search for another relationship type or view details of the type that you just created.

See Creating Relationship Types on page 2-10.

4. If you are viewing details for a selected or newly created relationship type, you can choose to add a relationship phrase and role pair to the type or to assign phrases and roles from this relationship type to relationship groups. See:

- Adding Relationship Phrase and Role Pairs to Relationship Types on page 2-7.
- Assigning Relationship Phrases and Roles to Relationship Groups on page 2-9.

After you add a phrase and role pair or assign to relationship groups, you return to view the details of your relationship type.

Searching for Relationship Types

Use the Relationship Type page to search for the relationship type that you want to view, add relationship phrase and role pairs to, or assign to relationship groups. You also search to make sure that the relationship type you want to create does not already exist.

The search results display not only the relationship type name but also whether it is a hierarchical relationship type or not and whether circular relationships are allowed or not. You also see when and by whom the relationship type was created.

> **Note:** If the relationship type is seeded, the Created By column displays *ORACLE* and the Creation Date column shows the date that the relationship type record is created in your database.

For an overview of setting up for relationships, see Administering Relationships on page 2-2.

To search for a relationship type:

1. Navigate to the Relationship Type page (Administration > Relationships).
2. Enter the relationship type to search for and click the Go button.
3. View the results of your search.

Viewing Relationship Types

Use the Overview page to view the definition of a relationship type and its included relationship phrase and role pairs. For each relationship phrase and role pair, the Relationship Phrase and Role Pairs table displays:

- The subject role and phrase
- The subject and object type, for example Organization or Person

For an overview of setting up for relationships, see Administering Relationships on page 2-2.

To view the details of a relationship type:

1. Search for the relationship type that you want to view. See Searching for Relationship Types on page 2-5.
2. In the Search Results table, click the name of the relationship type that you want to view details for.

   Note: You can also navigate to the Overview page after you create a new relationship type. See Creating Relationship Types on page 2-10.

3. View the relationship type details.
4. You can choose to:
   - Add a relationship phrase and role pair to this relationship types, on page 2-7.
   - Assign any of the displayed phrases and roles to relationship groups, on page 2-9.

Adding Relationship Phrase and Role Pairs to Relationship Types

Use the Add Relationship Phrase and Role Pair pages to add a relationship phrase and role pair to an existing relationship type. Similarly, you also define a phrase and role pair when you create a new relationship type.

For the subject and object of the relationship phrase and role pair, you define:

- The type, for example Person or Organization
- The relationship phrase, either an existing one from another relationship type or a new user-defined phrase
- The singular and plural relationship role

What you define for the subject and object also determines the phrases, roles, and types for the reciprocal direction of the pair. For example, if you enter:

- Subject type - Organization
- Subject phrase - Employer Of
- Subject role - Employer and Employers
- Object type - Person
- Object phrase - Employee Of
- Object role - Employee and Employees,

then the relationship phrase and role pair is defined as shown in this table:

Subject Role	Subject Type	Subject Phrase	Object Type
Employer	Organization	Employer Of	Person
Employee	Person	Employee Of	Organization

For an overview of setting up for relationships, see Administering Relationships on page 2-2.

To add a relationship phrase and role pair to a relationship type:

1. View the relationship type that you want to add phrase and role pairs to. See Viewing Relationship Types on page 2-6.
2. Click the Add Relationship Phrase and Role Pair button.

Note: Adding a phrase and role pair is also part of the relationship type creation process. See Creating Relationship Types on page 2-10.

3. Enter the subject type and subject relationship phrase.

   It does not matter which phrase is defined as the subject phrase, for example, Wife Of or Husband Of.

   For hierarchical relationship types, however, the defined subject is the parent, which ranks above the object, or child. For example, you would enter Employer Of and not Employee Of as the subject phrase to imply that the employer ranks above the employee. The employee, of course, is still the subject of the relationship when viewed from his or her perspective, for example, Joe as the employee of Oracle.

4. Enter the singular and plural relationship roles that describe the subject.

   The roles can be a combination of the relationship type and phrase. For example, if the type is Oracle Employment and the phrase is Employee Of, the role can be Oracle Employee.

   This method of defining roles helps you keep roles unique and differentiate between roles of similar relationship types. For example, if you have another relationship type called Elcaro Employment, you would define Elcaro Employee as the role. You cannot have duplicate roles such as Employee for both relationship types.

5. Enter the corresponding information for the object.

6. Click the Apply button.

7. The confirmation takes you back to view the relationship type with your phrase and role pair added. See Viewing Relationship Types on page 2-6.

Assigning Relationship Phrases and Roles to Relationship Groups

Use the Assign to Relationship Groups page to assign relationship phrases and roles to relationship groups. You can assign each phrase within a relationship phrase pair and type to a different set of groups. The phrase assignment automatically determines the assignment of the corresponding role.

For example, you can assign the relationship phrase Employer Of to a set of groups that differ from the assignments for Employee Of. The corresponding relationship role Employer would have the assignments of Employer Of, and likewise Employee with assignments of Employee Of.

Relationship groups are mainly used to determine which user interfaces in Oracle applications each phrase and role is available in. Each relationship group corresponds to one or more Oracle Applications user interfaces. Examples of groups include Customer Account Information, Party Families, Party Contacts, Party Corporation Hierarchy, and Party Customers.

For example, you would assign phrases for customer relationships to the Party Customers group. These phrases and their corresponding roles would then be available in Oracle Applications user interfaces with customer related functionality.

For an overview of setting up for relationships, see Administering Relationships on page 2-2.

To assign a relationship phrase and role to relationship groups:

1. View the relationship type with the phrase and role that you want to assign to relationship groups. See Viewing Relationship Types on page 2-6.
2. Click the Assign to Relationship Groups button.
3. In the Assign to Relationship Groups page, select the phrase that you want to assign and click the Go button.

   The Assign Relationship Phrase to Groups region displays the current assignments for the selected phrase.
4. Move relationship groups between the two boxes as needed. The relationship phrase and its corresponding relationship role are assigned only to the relationship groups in the Assigned Relationship Groups box.
5. Click the Apply button.

   The confirmation takes you back to view the same relationship type. See Viewing Relationship Types on page 2-6.

Creating Relationship Types

Use the Create Relationship Type pages to create a new relationship type along with a relationship phrase and role pair for the new type. After you search for the relationship type to make sure that it does not already exist, you follow a three-step process to create a new type.

You also specify whether the new type would create hierarchical relationships or not. If you create a nonhierarchical relationship type, you also determine if circular relationships are allowed with this relationship type or not.

For an overview of setting up for relationships, see Administering Relationships on page 2-2.

To create a new relationship type:

1. Search for the relationship type to make sure that it does not already exist. See Searching for Relationship Types on page 2-5.
2. Click the Create button after you verify that the relationship type is not in the search results.
3. In the Create Relationship Type page, enter the name of your relationship type and determine the relationship type's definition for hierarchical and circular relationships.
4. Create a relationship phrase and role pair for this relationship type. See steps 3 to 5 in Adding Relationship Phrase and Role Pairs to Relationship Types on page 2-7.
5. In the Review page, review your relationship type and phrase and role pair definitions.
6. Go back to make any necessary changes. Otherwise, click the Finish button.
7. From the confirmation page, you can choose to:
   - View details of the relationship type that you just created, on page 2-6 (start at step 3).
   - Search for or create another relationship type, on page 2-5.

3

Classifications

This chapter describes how to administer classifications, including:

- Creating, copying, and updating class categories.
- Assigning entities to class categories.
- Creating and updating class codes.
- Assigning parent class codes.

Classifications Overview

The TCA Classifications model provides a flexible tool that you can use to categorize entities, which can include parties, projects, tasks, orders, and so on. Classifications can use different paradigms and does not restrict you to a single way to classify an entity. This enables you to classify an entity, such as a party, in a way that the rest of the world sees it, in addition to the way it is referenced within your organization. This is extremely helpful when you map the internal representation of a company's environment to the way that the outside world models it.

The major components of the TCA Classifications model are:

- **Class category** - A broad subject area within which you can classify parties. A class category is a logical grouping of one or more class codes and allows for rules to be defined for how the category code structure is set up, as well as which entities can be assigned to these categories.

  You can define class categories to meet the needs of your organization. For example, you can define class categories consistent with special business considerations, pricing arrangements, or terms for a party.

- **Class code** - A specific value of the class category. These class codes can be organized in a hierarchical fashion. Class codes are grouped together into categories.

  For example, if you want to specify the industry sector to which a party belongs, you can use a predefined class category, such as SIC 1987, which includes the 1987 version of US Standard Industrial Classification (SIC) codes. For example, within the SIC 1987 class category, you could assign the class code Software to a party in the software industry.

  All classifications are made up of two key components: a class category and class code. In the user interface, the classification scheme you create is called a class category or classification. The individual values within the classification scheme are called class codes.

- **Classification rules** - The Classifications model allows class categories to have rules and characteristics which define how classifications can be assigned to entities. When you set up class categories, you can create specific rules such as allowing for multiple parents for the codes in the category. For example, a Hardware class category could include the tangible components of a computer system.

Entities with multiple classifications can have the classifications ranked in order of importance for the particular entity. A party can have multiple class codes associated with it. A ranking of these codes could be useful. For example, Oracle could have databases and applications linked to it as separate codes. If you are part of an organization interested in databases, you might rank the Database class code higher than the Application class code.

- **Class code hierarchy** - A hierarchy of class codes within a class category. For example, you could set up the High Tech class category, and the class codes associated with the High Tech class category are: Software, Hardware, Applications, PCs, Printers, and Consulting. These codes are set up in a hierarchical manner by assigning the parent codes to the appropriate children.

  High Tech

  - Software
    - Applications
    - ERP applications
    - CRM applications
    - Consulting
  - Hardware
    - PCs
    - Printers
    - Consulting

  When you create a class code hierarchy, three options are available to administer the hierarchy. You can:

  - Assign one or more parents to a code. As shown in the example above, Consulting can be found under both the Hardware and Software parent class codes.
  - Allow one or more codes to be assigned to an entity. Using the schema above, both Applications and Printers could be assigned to an Organization party.
  - Allow the assignment of higher level codes to an entity, not just the lowest level code. With the schema above, for example, a company could be assigned the Software code, even though that code is not at the lowest level, or leaf, node.

The Create Class Category and Update Class Category pages provide a list of the valid entities that the class codes within a class category can be assigned to.

Standard and Custom Classification Schema

A classification schema can be built using standards such as the NAICS (North American Industrial Classification System), NACE (European Union's Statistical Classification of Economic Activity), or SIC (Standard Industrial Classification) classification schema, or on user-defined classifications based on your organization's business needs.

If you use the seeded standard classification schema, then you do not have to set up user-defined categories and codes.

The Oracle Trading Community Classifications model includes the following standard class categories and class codes:

- **SIC 1987** - The 1987 version of the US SIC schema. This is the most popular industrial classification in U.S.
- **NACE** - The industrial classification schema used in European countries.
- **NAICS** - Introduced in 1997 to replace the SIC schema.
- **SIC 1972** - The 1972 version of the US SIC schema. Used by Dun & Bradstreet for classifying companies in Canada.
- **SIC 1977** - The 1977 version of the US SIC schema. Used by Dun & Bradstreet for classifying companies in European countries.

Administering Classifications

Use the classification process for:

- Searching for an existing class category
- Creating a class category
- Copying a class category
- Assigning an entity to a class category
- Updating a class category
- Creating a class code
- Updating a class code
- Assigning a parent class code

See Classifications Overview on page 3-2.

To administer classifications:

1. Search for class categories to update or to confirm that the class category you want to create does not already exist.
2. Define class categories, including assigning entities to and creating class codes for the category.
3. Optionally, define the hierarchy of class codes within a category. Assign the parent codes to the appropriate children codes, for example:
   - Software is the a parent of Applications.
   - Applications is the parent of ERP applications.

Searching for an Existing Class Category

Use the Classifications page search for a class category to view and update or to confirm that a class category does not already exist before you create a new category. In the Search region of the Classifications page, you can enter several criteria to search the existing class codes. Your initial search should be broad enough to find class categories that may be similar to the one you plan to create.

Note: You can search for compiled or uncompiled categories. However, to be able to use a class category and assign it to an entity, the class category must be in the compiled state.

To search for a class category:

1. Navigate to the Classifications page (Administration > Classifications).
2. Enter search criteria for the class category or the class code in the appropriate fields of the Search region. You can also select Yes or No in the Compiled poplist to filter the results by whether or not the class category or class code is compiled.
3. Click the Go button to start your search.
4. View the results.
5. If the appropriate class category is not found, click the Create Class Category button to create a class category. See Creating a Class Category on page 3-7.

Creating a Class Category

Use the Create Class Category page to define class categories. When you create a class category you must provide required information that identifies and describes the class category.

- Assign a name, meaning, and description to a category, for example, High Tech.
- Define rules for using the class category.
  - Allow single or multiple parent codes. For example, class codes in a High Tech category can have multiple parent codes.
  - Allow single or multiple parent code assignments. For example, you can assign the Hardware, PCs, or both to Vision Corporation.
  - Allow parent class code assignments. For example, you can assign class codes to Vision Corporation at any level of the hierarchy, Hardware or PCs, not just the lowest level of PCs.
  - Define what types of entities use the class codes. A seeded list of tables restricts the use of class codes. For example, the SIC Code categories are restricted to Organization parties.

You also assign at least one entity to the class category and create at least one class code for the new category.

To create a class category that is similar to an existing one, you can copy the existing category. See Copying a Class Category on page 3-15.

To create a class category:

1. In the Classifications page, make sure that the class category you want to create does not already exist and click the Create Class Category button. See Searching for an Existing Class Category on page 3-6.
2. Enter the required information in the appropriate fields.

3. Select any of the optional attributes for this class category:
   - **Allow Multiple Parent Codes** - You can select this check box to allow any node in your hierarchy to have more than one parent. Clearing this check box restricts the class category to only one parent.
   - **Allow Parent Code Assignment** - You can select this check box to allow the assignment of parent nodes in the class code hierarchy. Clearing this check box requires that you must use leaf nodes, nodes that have no children, for the class category.
   - **Allow Multiple Class Code Assignments** - You can select this check box to allow a user to classify a customer, opportunity, or other entity using more than one class code from this class category. Clearing this check box prevents users from assigning more than one class code to an entity.
4. In the Assign Entities region, you can assign entities to this class category. Select the appropriate entities identified by the table and column names.
5. Optionally enter, edit, or delete a condition defined with an SQL Where clause.
6. Click the Add New Entity Assignment button to add a new entity.

   For more information, see Assigning Entities to a Class Category on page 3-9.
7. Click the Apply and Create Class Codes button to apply and create new class codes for this category. See Creating a Class Code on page 3-10.

To use a class category, you must first compile it. A class category should be complied when it is created and whenever it is updated.

To compile class categories:

1. Navigate to the Classifications page (Administration > Classification).
2. Select No in the Compiled poplist.
3. Click the Go button to start your search for all uncompiled class categories.
4. Click the Compile Class Categories button.

Assigning Entities to a Class Category

Use the Assign Entities page or Entity Assignment region to assign entities to a class categories. You must assign an entity by entering the name of the table and the column for the appropriate entity. You can also optionally create a condition, using an SQL Where clause, to select a subset of the entities in your database.

To assign an entity to a class category:

1. Navigate to the Assign Entities page or Entity Assignment region.
   - From the Create Class Category page, click the Add New Entity Assignment button and then enter the entity information in the Assign Entities page. See Creating a Class Category on page 3-7.
   - If you have created a copy of an existing class category, then in the Create Class Category page enter the entity information in the Entity Assignment region. See Copying a Class Category on page 3-15.
   - From the Update Class Category page that displays an existing class category, click the Add Another Entity Assignment button and enter the entity information in the Entity Assignment region. See Updating a Class Category on page 3-12.
2. Enter the required entity information:
   - Table name, such as HZ_PARTIES
   - Column name, such as PARTY_ID

   You can use the list of values to search for the table and column name.
3. Enter an optional condition in the Condition field. The condition is expressed as an SQL Where statement, such as:

   ```
   PARTY_TYPE='ORGANIZATION'
   ```

Creating a Class Code

Use the Create Class Codes page to create the appropriate class codes for class categories. When you create the class codes you specify the name of each class code, a meaning, a description, the date when the code becomes active, and an optional date when the code is not active. You can immediately enable a class code or enable it at a later time.

To create a class code:

1. Click the Apply and Create Class Codes button in the Create Class Category page, after you have created a class category. See Creating a Class Category on page 3-7.
2. Enter the characteristics of the class code in the Class Codes region of the Create Class Codes page:
   - Name
   - Meaning
   - Description
   - Start date active
   - End date active
3. Check the Enabled check box to make the class code effective, or leave the check box clear until you are ready to enable it.

   You can use the Enabled check box, along with the Start and End active dates, to control the availability of a class code. For example, you can create and enable a class code with a start date in the future. On that start date, the class code automatically becomes available for use. You can immediately make an active class code unavailable by clearing the Enable check box. Or you can inactivate a class code by specifying an end date on some day in the future.
4. Optionally assign a parent class code to at least one of the class codes. See Assigning Parent Class Codes on page 3-11.

Assigning Parent Class Codes

Use the Assign Class Codes page, after you have created a class category and its class codes, to make one class code the parent of another class code in a class code hierarchy. This option structures class categories and class codes in parent-child hierarchal relationships.

The assignment of parent class codes is restricted by the options available for the class category. When you create or update a class category, you can check or clear the Allow Multiple Parent Codes check box, which allows or prevents a class code from having more than one parent class code.

You can update class code definitions, including parent codes, in the Update Class Code page. See Updating a Class Code on page 3-13.

To assign a parent class code to a new class code:

1. Create new class codes for a new category. See Creating a Class Code on page 3-10.
2. In the Class Codes region, select the child class code of the parent-child relationship that you are creating.
3. Click the Assign Parent Class Codes button to navigate to the Assign Class Codes page.
4. Select a parent class code, or one or more if allowed.
   - If the Allow Multiple Parent Codes option is selected, then you can select one or more class codes.
   - If the Allow Multiple Parent Codes option is not selected, then you can only select one class code.
5. Click the Assign button.

Updating a Class Category

Use the Update Class Category page to update the information associated with an existing class category, such as the meaning, description, delimiter, and entity assignment for a class category.

To update an existing class category:

1. Search for the class category that you want to update. See Searching for an Existing Class Category on page 3-6.
2. In the Results region, click the appropriate class category.
3. In the Update Class Category page, you can update the information about the class category in the Class Category Details region and the Entity Assignment region. See Creating a Class Category on page 3-7 and Assigning Entities to a Class Category on page 3-9.
4. Click the Compile button to save your work.

For user-defined class codes, you can navigate to the Update Class codes page from this page to revise information about class codes. For more information, see Updating a Class Code on page 3-13.

Updating a Class Code

Use the Update Class Codes page to update the information associated with existing class codes, such as the meaning, description, parent, end date, and whether the class code is enabled or disabled.

To update an existing class code:

1. Search for the class category with the class codes that you want to update. See Searching for an Existing Class Category on page 3-6.
2. In the Classifications page, click the Update Class Codes icon for the class category with the class codes that you want to update.
3. In the Update Class Codes page, revise the information about the class codes, as necessary. You can revise the information in the following fields:
   - Meaning
   - Description
   - Parent Class Code
   - End Date Active

   Note: The Start Date Active date cannot be changed.
4. Check or clear the Enabled check box to enable or disable the class code.
5. Save your work.

If the class code that you want to update is not found, then you must create the class code. For more information, see Creating a Class Code on page 3-10.

Viewing a Class Code Hierarchy

You can access the class code hierarchy for viewing by clicking the View Class Code Hierarchy button on the Update Class Codes page to bring up the View Class Code Hierarchy page. See Updating a Class Code on page 3-13.

On the Update Class Category page you can also view the class code hierarchy. See Updating a Class Category on page 3-12.

For each class code you can view:

- Class code meaning
- Class code
- Description
- Start date active
- End date active

To update the class code hierarchy, see Updating a Class Code on page 3-13.

Copying a Class Category

Use the Copy Classification feature on the Classifications page to create similar class categories. You can copy an existing class category and then edit the information about that class category to create similar class categories.

Although class codes are associated with a class category, you cannot edit the class codes for a copy of a class category in the Create Class Category page. You must edit the copy of a class category and then, if necessary, edit the class codes in the Update Class Codes page.

To copy a class category:

1. Search for the class category that you want to copy. See Searching for an Existing Class Category on page 3-6.
2. Click the Copy Classification icon for the class category that you want to copy.
3. In the Create Class Category copy page, edit the class category details and entity assignments as necessary. See Creating a Class Category on page 3-7 and Assigning Entities to a Class Category on page 3-9.
4. To update the class codes for the category, see Updating a Class Code on page 3-13.

4

Enrichment

This chapter describes administering Third Party Data Integration, including:

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

Administering Third Party Data Integration

Use the Enrichment subtab in Oracle Trading Community Architecture Administration to set up Third Party Data Integration only if you acquire and use third party data in the TCA Registry. It is recommended that you do not frequently change the setup.

> **See also:** Introduction, *Oracle Trading Community Architecture Third Party Data Integration User Guide*

For an overview of Administration, see Introduction on page 1-2.

Setting Up Data Sources

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

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

Controlling Overwrite and Creation of Data

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

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

To administer Third Party Data Integration:

> **Note:** You should perform Third Party Data Integration setup steps when no users are logged into Oracle Applications.

1. Integrate with D&B for acquiring data from the D&B database (if you are not already integrated with D&B), on page 4-4.
2. Select and rank data sources for party profile entities to set up the SST record, on page 4-9.
3. Define user overwrite rules for party profile entities (if you set up at least one attribute with third party data source in step 3), on page 4-11.
4. Define the third party overwrite rule for party profile entities (if you allow at least one attribute to be overwritten in step 4), on page 4-13.
5. Select data sources for Other entities, on page 4-24.
6. Define user data creation rules for Other entities (if you set up at least one entity with third party data source in step 6), on page 4-26.
7. Assign user overwrite and user data creation rules using profile options (if you defined any of these rules), on page A-2.
8. Run the Third Party Integration Update program to regenerate the SST record, on page 4-29.
9. Ask your system administrator to restart Apache or the Web server after you perform any of the setup steps so that your changes take effect.

Integrating with D&B

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

For an overview of Third Party Data Integration setup, see Administering Third Party Data Integration on page 4-2.

To set up the integration with D&B:

1. Contact D&B for a contract.

   See also: D&B Contract, *Oracle Trading Community Architecture Third Party Data Integration User Guide*

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

   - D&B HTTPS URL
   - D&B user name
   - D&B password

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

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

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

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

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

Party Profile Entities Setup

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

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

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

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

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

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

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

For an overview of Third Party Data Integration setup, see Administering Third Party Data Integration on page 4-2.

Attribute Groups

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

Whenever the SST record is regenerated after you run the Third Party Data Integration Update program, all nonprimary attributes in each group are populated from the same data source as their primary attribute. For more information about the program, see Third Party Data Integration Update Program on page 4-29.

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

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

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

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

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

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

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

Setting Up Data Sources for Party Profile Entities

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

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

Note: If no data source has a value for a specific attribute, Oracle applications display nothing and the user can enter a value for that attribute.

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

For an overview of party profile entities setup, see Party Profile Entities Setup on page 4-6.

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

1. Navigate to the Set Up Data Sources page (Administration > Enrichment > Third Party Data Rules > Party Profile Entities > Data Sources).

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

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

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

   Note: If a displayed attribute is the primary attribute for an attribute group, your setup applies to the entire group. See Attribute Groups on page 4-7.

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

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

5. Rank sources in the Rank Data Sources box, with uppermost as highest ranked.

6. Click the Apply or Finish button.

7. Repeat steps 2 to 6 as needed.

Setting Up User Overwrite Rules

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

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

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

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

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

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

For an overview of party profile entities setup, see Party Profile Entities Setup on page 4-6.

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

1. Navigate to the Set Up User Overwrite Rules page (Administration > Enrichment > Third Party Data Rules > Party Profile Entities > User Overwrite Rules).
2. Click the Create New Rule button or the Update, Duplicate, or Delete icon.
3. If you are creating, updating, or duplicating a rule, enter or update the rule name as needed.
4. Check the Allow User to Overwrite Third Party Data check box if you want to allow user-entered data to overwrite highest ranked third party data in the SST record.

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

   Note: If a displayed attribute is the primary attribute for an attribute group, your setup applies to the entire group. See Attribute Groups on page 4-7.

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

Setting Up the Third Party Overwrite Rule

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

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

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

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

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

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

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

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

  Note: Even if the third party overwrite rule applies and allows overwrite, the third party value does not overwrite the user-entered value if the third party value has not changed since the last acquisition from its provider.

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

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

For an overview of party profile entities setup, see Party Profile Entities Setup on page 4-6.

To set up the third party overwrite rule:

1. Navigate to the Set Up Third Party Overwrite Rule page (Administration > Enrichment > Third Party Data Rules > Party Profile Entities > Third Party Overwrite Rule).
2. Check the Allow Third Party to Overwrite User Data check box if you want to allow third party data to overwrite user-entered data in the SST record.

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

   Note: If a displayed attribute is the primary attribute for an attribute group, your setup applies to the entire group. See Attribute Groups on page 4-7.

3. Click the Apply button.

Party Profile Entities Setup Example

This example shows how different settings for some party profile attributes affect the functionality in Oracle applications. Some of these attributes are primary attributes that belong to attribute groups, but the example treats the primary attributes as if on their own. For an example of attribute group setup, see Attribute Groups Setup Example on page 4-19.

Data Sources Setup and Single Source of Truth Record

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

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

User Overwrite Rule

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

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

User Enters Data

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

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

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

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

Third Party Overwrite Rule

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

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

New D&B Data is Acquired

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

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

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

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

Attribute Groups Setup Example

This example shows how attribute groups in the SST record are populated and subsequently updated. For more information, see Attribute Groups on page 4-7.

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

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

Data Source Setup and Single Source of Truth Record

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

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

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

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

User Overwrite Rule

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

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

User Enters Data

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

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

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

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

Other Entities Setup

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

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

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

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

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

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

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

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

For an overview of Third Party Data Integration setup, see Administering Third Party Data Integration on page 4-2.

Address Entity and Tax Location Validation

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

Setting Up Data Sources for Other Entities

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

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

Note: Users can enter new records for any entity only if the user data creation rule that is assigned to the users allows them to. See Setting Up User Data Creation Rules on page 4-26.

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

For an overview of Other entities setup, see Other Entities Setup on page 4-22.

To view and set up data sources for Other entities:

1. Navigate to the Set Up Data Sources page (Administration > Enrichment > Third Party Data Rules > Other Entities > Data Sources).
2. Select at least one entity and click either the Update as a Group or Update Individually button, depending on whether you want to update the selected entities together or individually.
3. For either all selected entities or an individual entity, move data sources between the two boxes. Only data sources in the Selected Data Sources box are considered for providing records to use in Oracle applications.

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

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

Setting Up User Data Creation Rules

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

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

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

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

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

For an overview of Other entities setup, see Other Entities Setup on page 4-22.

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

1. Navigate to the Set Up User Data Creation Rules page (Administration > Enrichment > Third Party Data Rules > Other Entities > User Data Creation Rules).
2. Click the Create New Rule button or the Update, Duplicate, or Delete icon.
3. If you are not deleting a rule, enter or update the rule name as needed.
4. Check the Allow User to Create Data check box if you want to allow new user-created records.

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

---

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

Other Entities Setup Example

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

Data Source Setup

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

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

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

User Data Creation Rule

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

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

Third Party Data Integration Update Program

Use the Third Party Data Integration Update program to:

- Regenerate the single source of record.

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

- Regenerate some data for the Other entities.

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

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

To run the Third Party Data Integration Update program, navigate to the Concurrent Request page (Administration > Enrichment > Third Party Data Rules > Concurrent Request). After you submit the request, you can check on the request status in the Standard Request Submission windows.

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

Prerequisite

Complete the Third Party Data Integration setup for the first time or update data source settings. For more information, see Administering Third Party Data Integration on page 4-2.

Program Parameters

Commit Size

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

Number of Workers

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

5

Data Sharing and Security

This chapter describes how to securely share data, including:

- Creating, updating, and viewing data sharing groups.
- Assigning access privileges.

Data Sharing and Security Overview

Oracle Trading Community Architecture provides a model for managing information about entities such as customers. The TCA Data Sharing and Security (DSS) feature provides the capability to manage who can create, modify, and delete information about TCA data model entities across the applications in the Oracle E-Business Suite.

You can configure applications in the E-Business Suite to implement the data sharing and security rules required by your organization's internal policies and procedures, as well those required by governmental regulations and laws. For example, you can establish security rules so that only healthcare workers can change personal information about patients.

The DSS feature registers data security rules in a central repository using the security features of Oracle's Application Object Library (AOL). Because E-Business Suite applications use the TCA public application programming interfaces (APIs) to create, update, and manage party information, data security rules are encoded in these APIs to enforce consistent behavior across the E-Business Suite.

With the DSS feature, you can control access to the following TCA data model entities:

- Parties
- Person parties
- Organization parties
- Relationships
- Classification code assignments
- Party sites
- Locations
- Party contact points
- Party site contact points

Administering Data Sharing and Security

To secure information about entities, a TCA data security administrator must define the data sharing groups that specify the criteria used to determine the data to be secured. Security criteria can be one or more of the following characteristics:

- Classification
- Relationship
- E-Business Suite module used to create the data

After defining a data sharing group, the TCA data security administrator can assign access privileges to users who create, update, or delete information secured by the data sharing group. You can assign access privileges to users at the following levels:

- Global or public (all users)
- Responsibility
- Individual user

> **Note:** You cannot use the DSS feature to restrict users of an application from viewing information created and maintained in that application. The DSS feature limits the ability of users to create, update, or delete information that is secured based on that data sharing group definition.
>
> For more information see the *Oracle Applications System Administrator Guide* and the user guides for the applications in the E-Business Suite.

Two responsibilities can access the Security Administration pages:

- **Trading Community Manager** - Can only view existing data sharing groups and cannot create new data sharing groups or update existing ones.
- **TCA Data Security Administrator** - Has both view and update access privileges.

See Data Sharing and Security Overview on page 5-2.

Example

Consider the case of a hospital implementing Oracle applications powered by TCA. In this situation, the hospital could define different data sharing groups to secure patient information as well as hospital employee information. A security conflict might occur if a hospital employee falls ill and becomes a patient at the same hospital. Which privilege assignment scheme controls access to this entity?

The DSS feature addresses this issue by allowing administrators to create a third data sharing group that defines the privileges associated with creating, updating, and deleting records of parties that are both employees and patients. For the appropriate privilege assignment to take place, this third data sharing group must be assigned a rank that is higher than the rank assigned to the Employee Only or the Patient Only groups.

Seeded Data Sharing Groups

You can use the seeded data sharing groups listed in this table, in addition to the ones that you create.

Group Name	Group Code
Public	PUBLIC
Human Resources Shared Data	HR_SHARED

Administration Process

A TCA data security administrator creates and updates data sharing groups, enables or disables data sharing groups, and assigns access privileges to responsibilities and users.

> **Note:** To create, update, or delete data sharing groups you must have the TCA Data Security Administrator responsibility.

The Data Sharing and Security Administration page (Administration > Security) provides a starting point for a TCA data security administrator to define security rules and to assign access privileges for information modeled by the Oracle Trading Community Architecture or the Oracle Customer Model.

- To create a new data sharing group, click the Create button. See Creating a Data Sharing Group on page 5-7.
- To assign the privilege to access a data sharing group to a responsibility or an individual user, click the Assign Privileges icon for the appropriate data sharing group. See Assigning Privileges to Access a Data Sharing Group on page 5-11.
- To view and update a data sharing group, click the data sharing group name. See Updating a Data Sharing Group on page 5-10.

  The Trading Community Manager responsibility can only view information. Only the TCA Data Security Administrator responsibility can also update the data sharing group information.

> **Note:** From the Data Sharing and Security Administration page, you can also click on Third Party Data Rules for Third Party Data Integration administration, which allows you to control the usage of third party and user-entered data. See Administering Third Party Data Integration on page 4-2.

When you define a data sharing group, you must explicitly assign access privileges to the information secured by the data sharing groups. If an entity is secured by a data sharing group, then explicit assignments must be made to the appropriate users or responsibilities to define their access privileges. If privilege assignments are not made, then no one will have access to the information.

If an entity is not covered by any defined data sharing group, you can use the HZ: Default Data Sharing Group profile option to designate the default group that would be assigned to that entity.

To control the release of Data Sharing and Security, TCA data security administrators can use the HZ: Data Sharing and Security Enabled profile option to limit TCA security features to a specific user before generally releasing the functionality to ensure a controlled release. Furthermore, data sharing groups can be set up, but not enabled until the desired security is ready to be enforced.

See Profile Options on page A-2.

Creating a Data Sharing Group

This process enables a TCA data security administrator to define data sharing groups by specifying information that identifies the data sharing group and the criteria that define the group: classifications, relationships, source modules, and specific TCA data model entities supported by the DSS feature.

> **Note:** A TCA data security administrator can only set table or row level security. Specific attributes such as a person's date of birth cannot be secured. However, the entire person profile can be secured using the Create Data Sharing Group page.

This page can only be accessed with a TCA Data Security Administrator responsibility.

To create a data sharing group:

1. Click the Create button in the Data Sharing and Security Administration page. See Administration Process on page 5-5.
2. Enter a name for this group in the Data Sharing Group Name field.

   The name should be descriptive of the secured data and of the users, responsibilities, and public that you assign the privilege of accessing this data sharing group.
3. Enter a code for this group in the Data Sharing Group Code field.

   This code must be a unique identifier. The code cannot be updated, although other attributes can be.
4. Enter a description for this group in the Data Sharing Group Description field.
5. You can specify the rank of this group that will be used to resolve conflicting security rules between groups and to order the display of this group with other groups on the Data Sharing and Security Administration page. Rank controls the order in which data sharing groups are evaluated to determine which sharing group applies to data.

   For example, you can set up two data sharing groups, one for patients and one for employees. If the Patient group is ranked higher than the Employee group, then information about an employee who is a patient would be secured as part of the Patient group.

- Select the Last option to place this data sharing group at the end of the list.
- Select the Before option and a data sharing group to place the new data sharing group before the selected existing data sharing group.

6. Check or clear the Enable Data Sharing Group check box.
7. In the Classifications region, add class categories to be included in this data sharing group.
8. Enter the name of a classification, or class code, associated with each class category.

   The Class Path column displays the hierarchical position of class codes in the class code hierarchy of a class category.

   For more information on classifications, see Classifications Overview on page 3-2 and Administering Classifications on page 3-5.
9. Check or clear the Enabled check box to enable or disable the class category and classification.
10. Add relationship roles, such as Employee, Patient, Customers, and so on in the Relationships region.
11. Check or clear the Enabled check box to enable or disable the relationship role.

    For more information on relationships, see Administering Relationships on page 2-2.
12. In the Created By Module region, enter a source application or module that stores and maintains the information secured by this data sharing group. This section displays a list of the applications and modules, secured by a TCA data security administrator, that created the entity within the TCA registry.

    For example, to only allow Oracle Healthcare application users to create a particular person entity called Patient, then the TCA data security administrator may secure the Patient relationship in the Relationships region, the Business Function of Patient in the Classifications region, and the Oracle Healthcare Applications (OHC) in the Created By Module region to specify the business rules needed to secure patient information.
13. Check or clear the Enabled check box to enable or disable the created by module.
14. Check or clear the check boxes, in the Entities region, for the entities secured by this data sharing group.

The DSS feature encapsulates the following entities modeled within TCA:

- Parties
- Person parties
- Organization parties
- Relationships
- Classification code assignments
- Party sites
- Locations
- Party contact points
- Party site contact points

15. Click the Apply button to create this data sharing group.

Updating a Data Sharing Group

This process enables a TCA data security administrator to update existing data sharing groups by modifying the classifications, relationship roles, and entities of previously defined data sharing groups.

You can modify or update existing criteria based on changes in the application used to create and manage the information a TCA data security administrator secures. For example, if an enterprise plans to use Oracle Customers Online, in addition to its Oracle TeleService call center, the TCA data security administrator could modify an existing data sharing group used to protect customer information to include Oracle Customers Online, so that only users of the two applications can create, update or delete customer information modeled within TCA.

This page can only be accessed with the TCA Data Security Administrator responsibility.

To update the information about a data sharing group:

1. Click the name of a data sharing group in the Data Sharing and Security Administration page. See Administration Process on page 5-5.
2. Modify the details of the data sharing group, as necessary, in the Update Data Sharing Group page.

   In response to changes in their organization's business policies or requirements, TCA data security administrators can:

   - Enable or disable an existing classification, relationship, or created-by module from the data sharing group.
   - Edit or add classifications, relationships, or created-by modules.

   See Creating a Data Sharing Group on page 5-7.
3. Click the Apply button.

Assigning Privileges to Access a Data Sharing Group

This process enables TCA data security system administrators to assign specific users, responsibilities, or all users (public) to specific data sharing groups.

A data sharing group assignment is a special entity that associates any entity with a data sharing group. Due to the configurable nature of the Data Sharing and Security solution, not all TCA entities are directly associated with a data sharing group, but only those that require protection. When you assign data sharing group privileges, those users, responsibilities, or groups can access the information protected by that data sharing group.

To assign data sharing and security access privileges to a responsibility or user:

1. On the Data Sharing and Security Administration page, click the Assign Privileges icon for a data sharing group. See Administration Process on page 5-5.
2. On the Assign Privileges page, select the type of grantee:
   - **Public** - All users
   - **Group** - Responsibility
   - **User** - Individual user
3. Enter the user or responsibility name of the grantee in the Name field, or use the list of values to find and select a user or responsibility name set up by the system administrator.
4. Check the appropriate check boxes to give create, update, or delete privileges to a grantee.
5. Click the Apply button.

A

Profile Options

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

Profile Options

During implementation, your system administrator sets a value for each profile option to specify how Oracle Trading Community Architecture Administration controls access to and processes data.

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

Profile Options in Enrichment

This section lists the profile options for Enrichment administration.

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

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

HZ: Allow User to Update Third Party Data
This profile option is not yet used.

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

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

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

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

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

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

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

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

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

HZ: Web Server Proxy Host Name
If your organization uses a proxy server, enter the host name that your information technology group provides.

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

HZ: Web Server Proxy Port
If your organization uses a proxy server, enter the proxy port number that your information technology group provides.

HZ: Web Server Proxy User Name

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

Profile Options in Security

This section lists the profile options for Data Sharing and Security Administration.

HZ: Data Sharing and Security Enabled

Enter *Yes* or *No* to enable or disable the Data Sharing and Security feature. You can also limit TCA security features to a specific user by setting the profile option to *Yes* at the User level before generally releasing the functionality to ensure a controlled release. This profile option lets the system administrator control whom Data Sharing and Security applies to.

HZ: Default Data Sharing Group

Enter the default data sharing group that should be assigned to any entity that does not match any of the defined data sharing group criteria.

Profile Option Access and Defaults

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

The key for this table is:

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

Profile Options	Value	Default	User Access	System Administrator Access			
				User	Responsibility	Application	Site
HZ: D&B Password	Required	No Default	Update	Update	Update	Update	Update
HZ: D&B Policy Function Exists	Optional	No Default	No Access	View Only	View Only	View Only	View Only
HZ: D&B URL	Required	No Default	Update	Update	Update	Update	Update

Profile Options	Value	Default	User Access	System Administrator Access			
				User	Responsibility	Application	Site
HZ: D&B User Name	Required	No Default	Update	Update	Update	Update	Update
HZ: Data Sharing and Security Enabled	Required	*No*	No Access	Update	Update	Update	Update
HZ: Default Data Sharing Group	Optional	No Default	No Access	View Only	View Only	View Only	Update
HZ: Display D&B Button in Customer Form	Optional	No Default	Update	No Access	No Access	No Access	Update
HZ: Third Party Data Integration Set Up for Organization Profile Entity	Optional	No Default	No Access	View Only	View Only	View Only	View Only
HZ: Third Party Data Integration Set Up for Person Profile Entity	Optional	No Default	No Access	View Only	View Only	View Only	View Only
HZ: User Data Creation Rule	Optional	No Default	View Only	Update	Update	Update	Update
HZ: User Overwrite Rule	Optional	No Default	View Only	Update	Update	Update	Update
HZ: Web Server Proxy Host Name	Optional	No Default	Update	Update	Update	Update	Update
HZ: Web Server Proxy Password	Optional	No Default	Update	Update	Update	Update	Update
HZ: Web Server Proxy Port	Optional	No Default	Update	Update	Update	Update	Update
HZ: Web Server Proxy User Name	Optional	No Default	Update	Update	Update	Update	Update

Glossary

See also: Glossary, *Oracle Trading Community Architecture Relationship Manager User Guide*

See also: Glossary, *Oracle Trading Community Architecture Data Quality Management User Guide*

Attribute

An attribute corresponds to a column in a TCA Registry table, and the attribute value is the value that is stored in the column. For example, Name is an attribute and the actual values of party names are stored in a column in the HZ_PARTIES table.

Attribute Group

An attribute group is a group of closely related attributes within the same entity. The values for each attribute in a group must come from the same data source.

Class Category

A class category consists of multiple class codes that allow for broad grouping of entities. Categories can have rules pertaining to a set of class codes, for example, Multiple Parent, Multiple Assignment, and Leaf Node Assignment rules.

Class Code

A class code is a specific value for a class category.

Classification

Classification is a means of categorizing different objects in Oracle Applications. Classifications are not limited to parties but can include projects, tasks, orders, and so on. Classifications can be user defined or based on external standards.

Data Sharing Group

Data sharing groups group information about business entities such as parties, their addresses, contact points, relationships, and the like based on criteria such as classifications, relationship types, or "created by" modules.

For example, one data sharing group might be created for patients, another for employees, and another for parties classified as both patients and employees. A security administrator may then assign privileged access to create, update, or delete information secured by this data sharing group based on the applicable business policy.

Data Source

A data source is the source of the records in the TCA Registry, for example user entered or third party.

Entity

An entity is a group of related attributes in the TCA Registry, for example Organization Profile, Person Profile, Address, and Contact Point.

Organization Profile Entity

The Organization Profile entity contains attributes that describe parties of type Organization.

Other Entity

An Other entity is one that is not a party profile entity. Other entities include: Address, Contact Point, Credit Rating, Financial Report, and Relationship entities.

Party

A party is a person, organization, or collection of parties that can enter into relationships with other parties.

Party Profile Entity

A party profile entity is either the Person Profile or Organization Profile entity. These entities include attributes that describe parties of type Person or Organization.

Person Profile Entity

The Person Profile entity contains attributes that describe parties of type Person.

Primary Attribute

The primary attribute is the primary attribute of an attribute group. All attribute values in a group must come from the same data source as that of the primary attribute.

Registry ID

A Registry ID is the unique number given to each entity in the TCA Registry.

Single Source of Truth (SST) Record

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

TCA Registry

The TCA Registry is the central repository of party information for all Oracle applications. The party information includes details about organizations and people, the relationships among the parties, and the places where the parties do business.

Third Party Overwrite Rule

The third party overwrite rule determines if new third party data can overwrite existing user-entered data in the SST record. This rule applies only to user-entered data that previously overwrote third party data.

Trading Community Architecture (TCA)

Oracle Trading Community Architecture is a model that provides a virtual representation of the community that business is conducted in. This model includes parties and related party entities.

User Data Creation Rule

A user data creation rule determines which Other entities users can create new records for.

User Overwrite Rule

A user overwrite rule determines if new user-entered data can overwrite existing third party data in the SST record. Each rule includes all attributes from the party profile entities, and you define the rule for each individual attribute.

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