

Oracle® Trading Community Architecture

Relationship Manager User Guide

Release 11*i*

Part No. B10853-01

March 2003

Oracle Trading Community Architecture Relationship Manager User Guide, Release 11i

Part No. B10853-01

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Preface

Welcome to Release 11*i* of the *Oracle Trading Community Architecture Relationship Manager 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 Relationship Manager.

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

- The Oracle Applications graphical user interface.

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

How To Use This Guide

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

- Chapter 1 provides an overview of Oracle Trading Community Architecture Relationship Manager.
- Chapter 2 describes using Relationship Manager to view, create, and edit relationships among existing parties in the TCA Registry, as well as managing relationships in a hierarchy.
- Appendix A lists the profile options that affect the operation of Oracle Trading Community Architecture Relationship Manager.
- Appendix B describes the seeded match rule that you can use to set up Relationship Manager.
- A glossary provides definitions of terms specific to Oracle Trading Community Architecture Relationship Manager that are used in this guide.

Documentation Accessibility

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Other Information Sources

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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 Relationship Manager 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 Relationship Manager.

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 Relationship Manager (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 Administration User Guide

Use this user guide to learn how to set up relationship types that can be used to create and manage relationships among entities in the TCA Registry. You can create new relationship types, add relationship phrase and role pairs to existing types, and assign phrase and role pairs to relationship groups. All types and role pairs that are created in Administration can be used in Relationship Manager to create or edit relationships with. The user guide also provides information about administration for other features.

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. You can quickly and efficiently search through the TCA Registry for parties that you want to manage relationships for.

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 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 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 Concepts and Procedures

Use this user guide to learn how to use Oracle Customers Online (OCO) to solve the 3 C's of customer data management: 1) consolidation, 2) cleanliness, and 3) completeness. From Oracle Customers Online, you can access Relationship Manager as well as view and manage relationships with other OCO functionality.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Oracle Applications Implementation Wizard User Guide

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

Upgrading Oracle Applications

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Applications Product Update Notes

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

Oracle Workflow Guide

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

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Trading Community Architecture Relationship Manager 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 Relationship Manager 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 Relationship Manager working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

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 Relationship Manager 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 Relationship Manager 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 Relationship Manager.

Introduction

Use Oracle Trading Community Architecture (TCA) Relationship Manager to create and manage relationships among existing parties in the TCA Registry. The TCA Registry is a single source of party information for multiple Oracle E-Business Suite applications. Parties are entities, of type Person, Organization, or Group, that can enter into business relationships.

Note: You view and manage only parties of type Organization and Person in Relationship Manager.

Using relationships to model the interactions among parties in the TCA Registry helps you make better business decisions. For example, you can analyze and manage relationships with competitors and partners, or corporate relationships between subsidiaries and parent corporations.

In Relationship Manager, you get a comprehensive view of the roles that a single party plays with respect to other parties in the Registry, as well as a hierarchical view for hierarchical relationships. Aside from viewing relationships, you can create, edit, and end relationships.

Relationships Overview

The TCA relationship model lets you record complex, real-life relationships among entities in the TCA Registry. You can analyze not only direct relationships such as those with your competitors, but also indirect ones such as your customers' customers. You can also manage hierarchical relationships to better understand, for example, the management hierarchy within an organization.

A relationship represents the way two entities interact with each other, based on the role that each entity takes with respect to the other. For example, the employment relationship between a person and an organization is defined by the role of the person as the employee and the organization as the employer.

In addition, every relationship is reciprocal. Each entity is either the subject or object, depending on the perspective, or direction. For example, if Joe is the employee of Oracle, then Joe is the subject and Oracle is the object. Oracle as the employer of Joe, which flips the subject and object, still describes the same relationship.

Relationship Phrase and Role Pairs

A relationship phrase and role pair contains a correlating phrase pair and role pair, which describes the reciprocal roles that the two entities play in the relationship. For example, a relationship phrase and role pair contains the Employee Of and Employer Of phrase pair as well as the Employee and Employer role pair.

Every relationship is based on a relationship phrase and role pair. Even though only phrase pairs are used in Relationship Manager, the corresponding role pair is still stored in the system for each relationship.

A phrase pair, such as Employee Of and Employer Of, describe the role of either entity in the relationship as the subject. For example, Joe as the subject of the relationship would have Employee Of as the phrase, and Oracle as the subject would have Employer Of. The other entity in the relationship would be the object.

A relationship role pair, such as Employee and Employer, describes the two entities no matter the direction of the relationship. For example, Joe has the Employee role and Oracle the Employer role, both as either the subject or object.

Each relationship phrase and role pair also determines the type of entities for the relationship. For example, the Employer Of phrase and Employer role can be defined so that the employer must be a party of type Organization and the employee a party of type Person.

When you create a relationship with a relationship phrase or role, the reverse direction of the relationship is automatically created with the other phrase or role in the pair. For example, if you define Joe as the employee of Oracle, Oracle as the employer of Joe is also created.

Relationship Type

Each relationship phrase and role pair belongs to a relationship type, which categorizes the types of relationships that you can create. For example, the relationship phrase and role pair described above would belong to an employment relationship type.

Relationship types determine if the relationships created with the type are hierarchical, and if not, whether they can be circular or not. For more information, see Relationship Characteristics on page 1-5.

Every relationship type must contain at least one phrase and role pair. TCA provides seeded relationship types and phrase and role pairs, but you can create new ones as necessary in Oracle Trading Community Architecture Administration.

See also: *Administering Relationships, Oracle Trading Community Architecture Administration User Guide*

Relationship Date Range

Both directions of a relationship share a start and end date. The start date signifies when the relationship starts, not necessarily when it was created. Likewise, the end date is when the relationship ends.

The relationship date range helps you analyze the history of an entity's relationships. For example, you can see that Joe used to work for Oracle in a subsidiary location for the past two years but has been working at Oracle headquarters since last month.

Relationship Group

In general, relationship groups are used to determine which relationship roles and phrases are displayed in specific application user interfaces. Groups can also be used to categorize roles and phrases for other functional uses.

Note: Relationship groups do not apply to Relationship Manager. All seeded and user-created relationship phrases are available.

Relationship Characteristics

Relationships have additional characteristics that relationship types determine.

Hierarchical Relationships

A hierarchical relationship ranks one entity above the other. For example, in an employment relationship, the employer is ranked above the employee. In the employment hierarchy, the employee would be a child that appears below its parent, the employer. Hierarchical relationships are created with phrase and role pairs that belong to a hierarchical relationship type.

Circular Relationships

If a relationship type allows for circular relationships, you can create a relationship from Party A to Party B to Party C and back to Party A. For example, Party A is a competitor of Party B, which is a competitor of Party C, which is a competitor of Party A.

Hierarchical relationships cannot be circular. For example, if Alan's manager is Jenny, and Jenny's manager is Chris, then Chris's manager cannot be Alan.

Nonhierarchical relationship types can either allow or prevent circular relationships. For example, marital relationships cannot be circular, while competitive relationships described above can.

Major Features

Relationship Manager provides these features for relationships between existing parties in the TCA Registry:

- Search for the party that you want to manage relationships for.
- View the party's basic party information and any available additional details.
- View the relationship types that the party is involved in.
- View the relationships that the party belongs to for specific types.
- View the hierarchy of a hierarchical relationship type.
- Create relationships, available when you view the relationship types, relationships, or hierarchies of the party.
- Edit existing relationships, including ending the relationship.

Relationship Hierarchy

Relationship Manager displays hierarchical relationships in a hierarchy, a visual representation of the how parties rank among one another within a given relationship type. For any party in the hierarchy, all parties displayed one level below are its children, and the party displayed a level above is its parent.

For any party in the hierarchy, you can:

- Update its relationship by moving the party to another part of the hierarchy.
- Create new relationships.
- View additional party information, if available.

Setting Up Relationship Manager

You can set up Oracle Trading Community Architecture Data Quality Management (DQM) for the party search in Relationship Manager. DQM provides powerful search functionality, based on a match rule that determines which search criteria are available and how to select and rank the results.

You can use a seeded search match rule or create new rules. Relationship Manager's party search uses the rule that is assigned to the DQM: Match Rule for Relationship Manager Search profile option.

If you do not set up DQM, Relationship Manager provides a basic set of search criteria and uses standard search functionality. See *Searching for Parties and Viewing Results* on page 2-4.

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

To set up DQM for party search in Relationship Manager:

1. Set up Data Quality Management.

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

Optionally create a search match rule, or more than one if desired.

When defining match rule thresholds, keep in mind that a record must have a match score that exceeds the match threshold to be considered a search match to display in the search results.

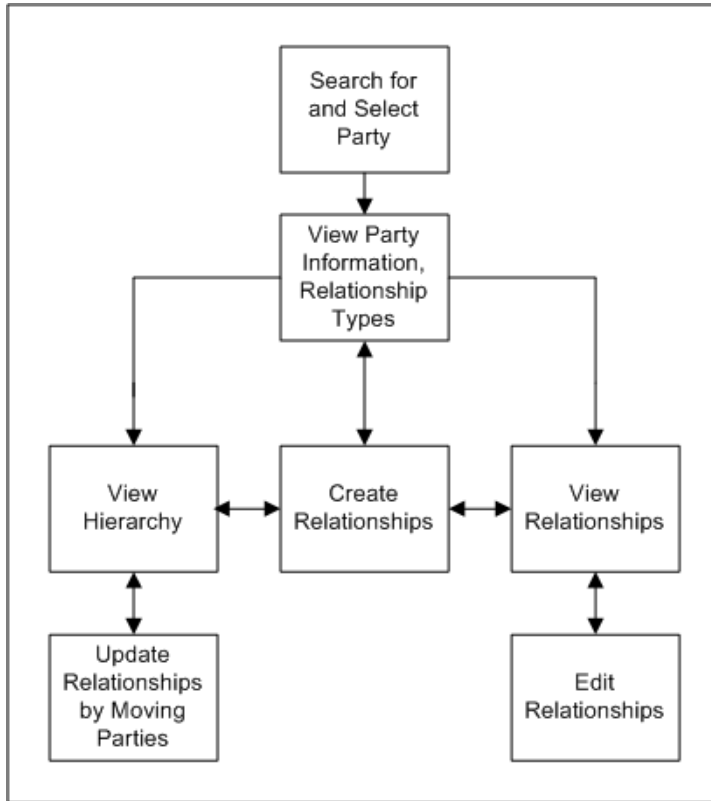
2. Assign the match rule that you want to use for the party search to the DQM: Match Rule for Relationship Manager Search profile option. See *Profile Options* on page A-2.

Party Relationships Management

This chapter describes using Relationship Manager to view, create, and edit relationships among existing parties in the TCA Registry.

Party Relationship Management Process

This diagram describes the general process flow of managing party relationships with the Relationship Manager.



1. Search for the party that you want to view and manage relationships for and select the party from the search results. See Searching for Parties and Viewing Results on page 2-4.

Note: If you want to see a relationship hierarchy, keep in mind that the party you search for is the root of the hierarchy.

2. View the party's overview information as well as the relationship types that it is involved in.

From here, you have three options:

- View relationships of selected relationship types. See Viewing Relationships on page 2-6.
- Create new relationships with a relationship type that the party is not currently involved in. See Creating Relationships on page 2-7.

After you create relationships, Relationship Manager takes you back to view the party's information and relationship types.

- View the hierarchy of a hierarchical relationship type. See Viewing Relationship Hierarchies on page 2-11.

3. If you choose to view relationships, you can also:

- Create new relationships with a relationship type that you are viewing. See Creating Relationships on page 2-7.
- Edit the existing relationships that you are viewing. See Editing Relationships on page 2-9.

After you edit or create a relationship, Relationship Manager takes you back to view the relationships.

4. If you choose to view a hierarchy, you can also:

- Update relationships by moving parties within the hierarchy. See Updating Relationships by Moving Parties in a Hierarchy on page 2-14.
- Create relationships for any party in the hierarchy, using the relationship type of the hierarchy. See Creating Relationships on page 2-7.

After you move parties or create relationships, Relationship Manager takes you back to the hierarchy view.

Searching for Parties and Viewing Results

Use the Party page to search for and select the party that you want to view and manage relationships for. This search includes parties of type Organization or Person.

The party search can be set up to use the powerful search functionality of Oracle Trading Community Architecture Data Quality Management (DQM). See *Setting Up Relationship Manager* on page 1-7.

If DQM is not set up for Relationship Manager, you can search by the party's name, Registry ID, tax registration number, or taxpayer ID.

If you want to see a relationship hierarchy, keep in mind that the party you search for is the root of the hierarchy. For example, if you view the corporate hierarchy for Party B, you can see Party C as the subsidiary of Party B but cannot see that Party B is a subsidiary of Party A. For more information, see *Viewing Relationship Hierarchies* on page 2-11.

From the search results, you select the party that you want and bring up the Overview page. The Relationship Types table displays:

- The relationship types that the party is involved in.
- The number of relationships for each type.
- Whether the relationship type is hierarchical or not.
- Whether the type allows circular relationships or not.

Note: You can also access the Overview page from other pages in Relationship Manager by clicking on the party name.

For an overview of Relationship Manager and relationships, see *Major Features* on page 1-6 and *Relationships Overview* on page 1-3.

To search for a party and view the party that you select from the results:

1. Navigate to the Party page (Trading Community > Relationship Manager).
2. Enter search criteria and click on the Go button.

3. View the results and click the name of the party that you want.

The Overview page shows the party's overview and relationship type information.

If available, you can access more information about the party from the Additional Details field.

4. From the Overview page, you can choose to:
 - View relationships, on page 2-6.
 - Create new relationships with a relationship type that the party is not currently involved in, on page 2-7.
 - View relationships hierarchies, on page 2-11.

Viewing Relationships

Use the View Relationships page to view the relationships of the selected party. You can view relationships for some or all of the relationship types that the party is involved in.

The selected party is the subject party of all displayed relationships. You also see the object party name and Registry ID, the date range of the relationship, and the source of the relationship, for example user entered or third party. Even relationships with passed end dates are included.

For an overview of Relationship Manager and relationships, see Major Features on page 1-6 and Relationships Overview on page 1-3.

To view relationships for a party:

1. Navigate to the Overview page for the party that you want to view relationships for. See Searching for Parties and Viewing Results on page 2-4.
2. Select at least one relationship type and click the View Relationships button.
3. The View Relationships page displays relationships for the party within your selected relationship types.
4. You can choose to:
 - Create relationships with one of the relationship types that you are viewing, on page 2-7.
 - Edit any of the displayed relationships, on page 2-9.

Creating Relationships

Use the Create Relationships page to create new relationships between existing parties in the TCA Registry. You can choose to create relationships from three pages:

- **Overview** - Create relationships with a relationship type that is not displayed for the party, which would be the subject of the new relationship.
- **View Relationships** - Create relationships with any of the selected types that you are viewing for the party, which would be the subject of the new relationship.
- **Hierarchy** - Create relationships with any of the parties in the hierarchy as the subject, using the relationship type of the hierarchy.

For example, a relationship phrase pair consists of: Organization is Headquarters Of Organization, and Organization is a Subsidiary Of Organization. If you are working on the party Oracle HQ, you would create a relationship with your party as the subject party and use the appropriate relationship phrase: Oracle HQ is the headquarters of Oracle Branch.

The reverse direction of the relationship, Oracle Branch as the subsidiary of Oracle HQ, is automatically created. You would see this direction of the relationship when you view relationships for Oracle Branch.

You can create multiple relationships between the same two parties, with different relationship phrases, even if relationship date ranges overlap. To use the same relationship phrase for multiple relationships between the same two parties, however, the relationship date ranges must not overlap.

For an overview of Relationship Manager and relationships, see Major Features on page 1-6 and Relationships Overview on page 1-3.

To create relationships:

1. Navigate to the Overview page for the party that you want to create relationships for. See Searching for Parties and Viewing Results on page 2-4.

Select the relationship type that you want to create relationships for and click the Go button. The available types that you can create relationships for exclude the types that the party is already involved in.

To create relationships with a type that the party is already involved in, you must first view the relationships within that type. This restriction ensures that you review the existing relationships for a type so that you do not create duplicate relationships.

After viewing current relationships, you select the type to create relationships for and click the Go button. The available types include only the types that you are viewing. See Viewing Relationships on page 2-6.

Note: You can also create relationships for any party in a relationship hierarchy. See Viewing Relationship Hierarchies on page 2-11.

2. The Create Relationships page displays your selected relationship type as the type for the new relationship, and the selected party is the subject party.
3. Select a relationship phrase and object party for the relationship, with respect to the subject party.
4. Optionally change the start date of the relationship, which defaults with the current date.

If you use the current date, the relationship's start time is the system time. If not, the start time is at the beginning of the start date.

5. Optionally enter an end date.
The relationship's end time is at the end of the end date.
6. Click the Add Another Row button to create another relationship for the subject party with this same relationship type. Repeat steps 4 through 6.
7. Click the Apply button.

The confirmation takes you back to the page from where you chose to create relationships. Your new relationships are reflected in that page.

Editing Relationships

Use the Edit Relationship page to edit a selected relationship for the party that you are viewing relationships for. This party is the subject party, which, along with relationship type and object party, cannot be changed. What you can update in the relationship are:

- Relationship phrase.

When you change the relationship phrase, Relationship Manager actually ends the existing relationship and creates a new one with the new phrase. The current date is the end date of the existing relationship.

- Start date.
- End date.

You can manually enter or change an end date to terminate a relationship at the current or another specified date. You can also extend a relationship by entering a later end date or removing the end date. Even relationships with an end date that already passed can be prolonged by changing or removing the end date.

Any changes that you make to the direction of the relationship with your party as the subject applies to the opposite direction of the relationship. For example, the direction you are editing is: Oracle is the employer of Joe. If you end this relationship, Joe as the employee of Oracle also ends.

Note: You can also edit hierarchical relationships by moving parties within the hierarchy of a relationship type, which changes the object party. See *Updating Relationships by Moving Parties in a Hierarchy* on page 2-14.

For an overview of Relationship Manager and relationships, see *Major Features* on page 1-6 and *Relationships Overview* on page 1-3.

To edit a relationship:

1. Navigate to the View Relationships page for a party with the relationships that you might want to edit. See Viewing Relationships on page 2-6.
2. Click the Edit icon for the relationship that you want to edit.

Note: You can edit only relationships with the User Entered source.

3. In the Edit Relationship page, change the relationship phrase, start date, end date, or any combination of the above.
4. Click the Apply button.

The confirmation takes you back to the View Relationships page, where you can see the results of your changes.

Viewing Relationship Hierarchies

Use the Hierarchy page to view a structured hierarchy of the relationships in a given hierarchical relationship type. For example, you get a visual representation of how a corporate structure is set up.

Your selected party is the root at the top of the hierarchy. You can see its children, or parties ranked lower in relationships, but not its parents.

Relationships							
The party you searched for always displays at the top level. You can create a new relationship for a party in the hierarchy by clicking on the appropriate icon in the Create Relationship column. You can view additional information about the party by clicking on the appropriate icon in the Details column.							
Select to...							Move
Select All Select None Expand All Collapse All							
⊕ Business World							
Select	Focus	Name	Registry ID	Relationship Phrase	Parent Name	Create Relationship	Details
<input type="checkbox"/>		Business World	2813				
<input type="checkbox"/>		JOE COHEN	6953	Asso1Employee of	Business World		
<input type="checkbox"/>		JANE CHAN	7314	Asso1Employee of	Business World		

The hierarchy represents a structure of relationships for the date that you specify in the As Of field. The hierarchy displays all relationships that fit both of these criteria:

- The start date is before or the same as the as of date.
- The end date is after the as of date, or no end date exists.

This table shows an example of three relationships and their date ranges.

Relationship	Start Date	End Date
A	January 1	January 10
B	January 10	January 30
C	January 15	None

This table shows examples of which relationships the hierarchy would display depending on the date in the As Of field.

As Of	Included Relationships
January 1	A
January 10	B
January 15	B and C
January 30	C

For each node in the hierarchy, Relationship Manager displays the party's:

- Name and Registry ID
- Relationship phrase with respect to its parent party
- Parent party name

For an overview of Relationship Manager and relationships, see Major Features on page 1-6 and Relationships Overview on page 1-3.

To view a relationship hierarchy:

1. Navigate to the Overview page for the party that you want to view relationship hierarchies for. See Searching for Parties and Viewing Results on page 2-4.

Suggestion: Search for and select the party that you want as the highest level, or root, in the hierarchy.

2. Click the Hierarchy icon for the relationship type that you want to view. Hierarchies are available only for hierarchical relationship types.
3. Enter the date that you want to view the hierarchy for in the As Of field and click the Go button. By default, the hierarchy is displayed for the current date.

4. To view the relationships within the hierarchy, click the arrows to expand or collapse levels.

Note: You can click the Focus icon for the party that you want to view as the root of the hierarchy. Clicking the name of any party in the hierarchy displays the party's overview information and does not render that party as the root of the hierarchy.

5. Click the Details icon for the party that you want to view additional information for, if available.
6. Repeat steps 3 to 5 as needed.
7. From the Hierarchy page, you can choose to:
 - Select parties and move them under another party within the same hierarchy, on page 2-14.
 - Create relationships for any party in the hierarchy, on page 2-7.

Updating Relationships by Moving Parties in a Hierarchy

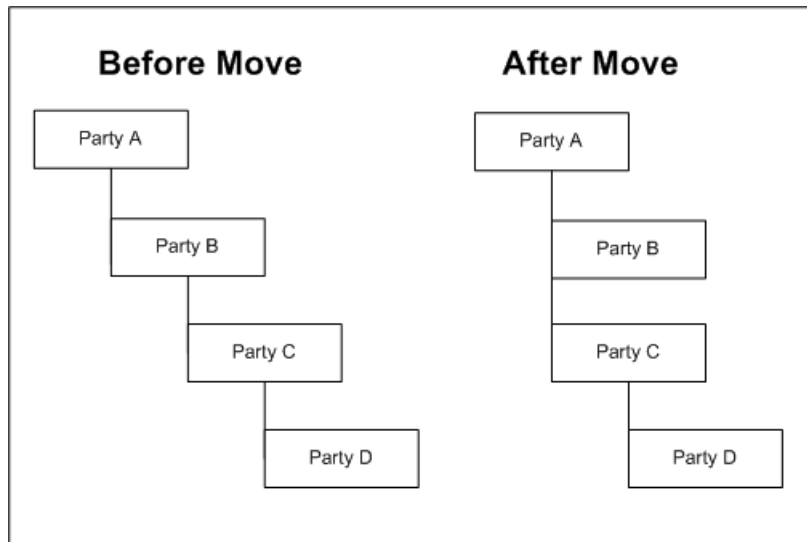
Use the Hierarchy and Move Parties pages to move selected parties within a hierarchy, accordingly updating affected relationships. You can select one or more parties that you want to move under a new parent in the same hierarchy. The parties that you move and the new parent can be on any level of the hierarchy.

Each move ends the existing relationship and creates a new one based on the new structure in the hierarchy. The current date is the end date of the existing relationship as well as the start date of the new relationship.

Note: If you need to change start or end dates after moves, use the Edit Relationships page. See Editing Relationships on page 2-9.

For example, the current hierarchy has Party A as the parent of Party B, which is the parent of Party C, which is the parent of Party D. You move Party C and select Party A as its new parent. This move ends the relationship for Party B as the parent of Party C and creates a new relationship for Party A as the parent of Party C. Party D moves along with Party C and remains a child of Party C.

This diagram shows the hierarchy before and after the move:



The relationship phrase of the moved relationship stays the same with respect to parties that you move. For example, if Party C was a subsidiary of Party B, it would then be the subsidiary of Party A, and Party D is still a subsidiary of Party C.

For an overview of Relationship Manager and relationships, see Major Features on page 1-6 and Relationships Overview on page 1-3.

To update relationships by moving parties in a hierarchy:

1. Navigate to the Hierarchy page for the hierarchy that you want to view and manage. See Viewing Relationship Hierarchies on page 2-11.

Suggestion: To ensure accurate results when you move parties, use the current date as the as of date. All moves are based on the hierarchy as it is today.

2. Select the party or parties that you want to move and click the Move button.

Note: You cannot move parties with the relationship start date in the future.

3. In the Move Parties page, expand the hierarchy as necessary to find the new parent party.
4. Select the new parent party and click the Apply button.

The confirmation takes you back to view the results of your move in the updated relationship hierarchy.

A

Profile Options

This appendix lists the profile options that affect the operation of Oracle Trading Community Architecture Relationship Manager. 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 user profile option to specify how Relationship Manager controls access to and processes data.

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

Profile Options Summary

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
DQM: Match Rule for Relationship Manager Search	Required	RM SEARCH RULE	Update	Update	Update	Update	Update

Profile Options in Relationship Manager

This section lists the profile options in Relationship Manager.

DQM: Match Rule for Relationship Manager Search

Specify the seeded or user-defined match rule that Relationship Manager uses to determine the search criteria and results for the DQM party search. See Setting Up Relationship Manager on page 1-7.

B

Seeded Match Rule

This appendix describes the seeded match rule that you can use to set up Relationship Manager.

Seeded Match Rule

Relationship Manager provides the RM SEARCH RULE seeded match rule that you can use or base your custom match rules on.

This seeded match rule is the default for the DQM: Match Rule for Relationship Manager Search. See *Setting Up Relationship Manager* on page 1-7 and *Profile Options* on page A-2.

You must run the DQM Compile All Rules program before you can use the seeded match rule.

See also: *DQM Compile All Rules Program, Oracle Trading Community Architecture Data Quality Management User Guide*

See also: *Match Rules Overview, Oracle Trading Community Architecture Data Quality Management User Guide*

RM SEARCH RULE

The RM SEARCH RULE match rule is used in Relationship Manager to determine the search criteria and results when you search for the party to manage relationships for. See Searching for Parties and Viewing Results on page 2-4.

Acquisition

This table shows the seeded attributes and transformations for the acquisition part of the matching process.

Attribute Match: Match All Attributes

Attribute Name	Entity	Filter	Transformation
Registry ID	Party	No	EXACT
Name	Party	No	SOUNDEX WR NAMES
Party Type	Party	Yes	EXACT
Taxpayer ID	Party	No	EXACT
Tax Registration Num	Party	No	EXACT
SIC Code	Party	No	EXACT
SIC Code Version	Party	No	EXACT
Contact Name	Contact	No	SOUNDEX WR PERSON + CLEANSE
Phone Number Flexible Format	Contact Point	No	EXACT
E-Mail Address	Contact Point	No	CLEANSE (EMAIL)
Address	Address	No	WR ADDRESS + CLEANSE
City	Address	No	CLEANSE
State	Address	No	WR STATE
Country	Address	No	EXACT

Scoring

This table shows the seeded thresholds for the scoring part of the matching process.

Threshold	Value
Match Threshold	400
Override Threshold	
Automatic Merge Threshold	

This table shows the seeded attributes and transformations for the scoring part of the matching process.

Attribute Name	Entity	Score	Transformation	Weight (%)	Type	Similarity (%)
Name	Party	70	EXACT STRING	100	Exact	
			WR NAMES	80		
			WR NAMES + CLEANSE	60		
Registry ID	Party	100	EXACT	100	Exact	
Taxpayer ID	Party	60	EXACT	100	Exact	
Tax Registration Num	Party	60	EXACT	100	Exact	
SIC Code	Party	25	EXACT	100	Exact	
SIC Code Version	Party	25	EXACT	100	Exact	
Contact Name	Contact	50	SOUNDEX	60	Exact	
			EXACT STRING	100		
			WR PERSON	80		
			WR PERSON + CLEANSE	70		
Phone Number Flexible Format	Contact Point	80	EXACT	90	Exact	
E-Mail Address	Contact Point	80	CLEANSE (EMAIL)	100	Exact	
Address	Address	75	WR ADDRESS	100	Exact	
			WR ADDRESS + CLEANSE	100		

Attribute Name	Entity	Score	Transformation	Weight (%)	Type	Similarity (%)
City	Address	10	CLEANSE	100	Exact	
State	Address	5	WR STATE	100	Exact	
Country	Address	5	EXACT	100	Exact	

Glossary

Circular Relationship

Circular relationships participate in a circle of relationships between entities. For example, Party A is related to Party B, who is related to Party C, who is related to Party A.

Hierarchical Relationship

Hierarchical relationships have either the subject or object ranked above the other. The relationship phrase and role pair of a hierarchical relationship type determines the rank. The ranking structure can be hierarchically displayed.

Hierarchical Relationship Type

A hierarchical relationship type allows hierarchical relationships. A hierarchy can be defined by creating multiple relationships with a hierarchical relationship type.

Object

The object is the entity that the subject is related to in either direction of a relationship. For example, if Oracle is the employer of Joe, then Joe is the object. With the other direction stating that Joe is the employee of Oracle, Oracle is the object.

Party

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

Registry ID

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

Relationship

A relationship is a state of connectedness between two parties, consisting of two entities and a relationship phrase and role pair that belongs to a relationship type. Each relationship has two directions, as determined by the phrase and role pair.

For example, a relationship states that Oracle is the employer of Joe, as well as that Joe is the employee of Oracle, in the other direction.

Relationship Group

Relationship groups are a means of categorizing relationship type phrase and role pairs for functional purposes. The main use of relationship groups is determining the phrase and role pairs that are available for a given user interface in Oracle Applications. For example, an application can be set up so that only the phrase and roles in a specific relationship group are displayed and used.

Relationship Hierarchy

A relationship hierarchy is all the entities associated with a particular hierarchical relationship type at a given point in time under a top node, or root. The hierarchy is a tree structure that shows relationships by organizing entities in hierarchical levels. For a given entity, all entities displayed the level below in the hierarchy are its children, and the entity displayed a level above is its parent.

Relationship Phrase

Relationship phrases describe the roles of the subject and object parties within each direction of a relationship. For example, if Oracle is the employer of Joe, and Joe is the employee of Oracle, then Employer Of is the relationship phrase for one direction and Employee Of is the relationship phrase for the opposite direction.

Relationship Phrase and Role Pair

A relationship phrase and role pair consists of a subject relationship phrase and role, an object relationship phrase and role, a subject type, and an object type. Each relationship phrase and role pair must belong to a relationship type, and each relationship type can have one or more relationship phrase and role pairs. Relationships are created based on phrase and role pairs and must follow the phrase and role pair definitions.

For example, the pair is defined so that Organization is the subject type, Employer Of is the subject phrase, Employer is the subject role, Person is the object type, Employee Of the object phrase, and Employee the object role. When you create a relationship with this phrase and role pair, the parties that you use must match the subject and object types.

Relationship Role

A relationship role describes the role that an entity plays in a relationship. Every relationship has two entities and two relationship roles, or a relationship role pair. One role describes the subject entity of the relationship, and the other the object. The roles remain the same in either direction of the relationship.

For example, if Joe is the employee of Oracle, then Joe's relationship role is employee, and Oracle's role is employer. The roles are the same in the other direction of the relationship: Oracle is the employer of Joe.

Relationship Type

A relationship type is a categorization of relationship phrase and role pairs and consists of one or more phrase and role pairs that can be used to create relationships. A relationship type determines if the relationships created with the type are hierarchical, and if not, whether they can be circular or not.

Subject

The subject is the entity that the object relates to in either direction of a relationship. For example, if Oracle is the employer of Joe, then Oracle is the subject. With the other direction stating that Joe is the employee of Oracle, Joe is the subject.

TCA Registry

The TCA Registry is the central repository of party and other 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.

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