Oracle® Customers Online

Implementation Guide

Release 11*i*

Part No. A96193-03

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This document provides the steps needed to implement
Oracle Customers Online Release 11*i* (11i.IMC.J/11.5.9,
IMC patch number 2767066).

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Oracle Customers Online Implementation Guide, Release 11*i*

Part No. A96193-03

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Preface

Welcome to Release 11*i* of the *Oracle Customers Online Implementation Guide.*

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

- The principles and customary practices of your business area.

- Oracle Customers Online.

  If you have never used Oracle Customers Online, 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 Customers Online Implementation Guide* contains the information you need to implement Oracle Customers Online.

- Chapter 1 describes general implementation of Oracle Customers Online.

- Chapter 2 describes implementation of specific features in Oracle Customers Online.

- Appendix A describes the seeded match rule that you can use to set up Oracle Customers Online.

Documentation Accessibility

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Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Customers Online.

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 Customers Online 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 Customers Online.

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 Customers Online (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 Customers Online Concepts and Procedures

Use this guide to learn how to use Oracle Customers Online to solve the 3 C's of customer data management: 1) consolidation, 2) cleanliness, and 3) completeness. The user guide describes the application and features that you are implementing for.

Oracle Trading Community Architecture Administration User Guide

Use this user guide to learn how to set up and administer relationships, classifications, Data Quality Management, Third Party Data Integration, and Data Sharing and Security.

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 Customers Online and other Oracle applications can implement and leverage.

Oracle Trading Community Architecture Oracle Customers Online XML Web Services User Guide

Use this user guide to learn how OCO XML Web Services enables application-to-application integration between the Oracle customer repository and legacy or third-party enterprise systems. The guide also provides implementation information for the XML Web Services.

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.

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 Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

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

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Customers Online. This manual details additional steps and setup considerations for implementing Oracle Customers Online with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Customers Online with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Customers Online.

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 Customers Online 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*.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Customers Online 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 Customers Online 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.

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Thank you for using Oracle Customers Online and this implementation guide.

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General Implementation

This chapter describes general implementation of Oracle Customers Online, including:

- Installation dependencies
- Installing prerequisite applications
- Creating, importing, and setting up employees
- Setting up address flexfields
- Setting up periodic programs
- Setting profile options
- Verifying implementation

Dependencies

Oracle Customers Online (OCO) requires Oracle CRM Foundation.

The following are optional dependencies:

- Oracle Marketing Online is required for campaigns and events.
- Oracle Sales Online is required for leads and opportunities.
- Oracle iStore is required for invoices and orders.
- Oracle iSupport is required for returns, service requests, and installed base.

> **See also:** *About Oracle Customers Online Mini-pack 11i.IMC.J*

Setting Up Prerequisite Applications

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

When you perform a fresh install of OCO, follow these high-level steps:

1. Add the following required responsibilities, if they are not already available.

    a. Purchasing Super User

    b. General Ledger Super User

    c. Inventory

2. Log in using the General Ledger Super User responsibility.

    a. Set up accounting key flexfields.

    b. Set up currencies.

    c. Set up the calendar.

    d. Set up the set of books.

    > **See also:** Setup, *Oracle General Ledger User Guide*

3. Log in using an HR user responsibility and define the organization structures.

    > **See also:** Implementation Steps, *Implementing Oracle HRMS*

4. Log in using the System Administrator responsibility. Set up the system profiles MO: Operating Unit and GL Set of Books Name.

    > **See also:** Profile Options in Oracle Application Object Library, *Oracle Applications System Administrator's Guide*

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

> **Warning:** After this utility runs, you cannot select this option in the future.

6. Log in to Oracle Receivables and set up the Sales Tax Location Flexfield.

> **See also:** Setting Up, *Oracle Receivables User Guide*

7. Log in to Oracle Inventory and set up this application, as necessary, to meet your requirements.

> **See also:** Setting Up, *Oracle Inventory User's Guide*

8. Log in using the Order Management Super User responsibility. Set up the Item Validation Org parameter.

> **See also:** Enabling Order Management Parameters, *Oracle Order Management Suite Implementation Manual*

Creating Employees

You must create the individuals who will be using Oracle Customers Online as employees before you can set them up as users.

With Full Oracle Human Resources (HRMS) Installation

Responsibility
US HRMS Manager

Navigation
People > Enter and Maintain

Procedure
Click New.

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

> **See also:** Employee Management, Special Information Types, *and* Entering a New Person (People Window), *Managing Your Workforce Using Oracle HRMS*

Without Full Oracle HRMS Installation

Responsibility
CRM Resource Manager

Navigation
Maintain Employee > Employee

> **See also:** Entering Employees Window, *Managing Your Workforce Using Oracle HRMS*

Importing Employees

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

Prerequisite

You must set up the employees in Oracle HRMS.

Responsibility

CRM Resource Manager

Navigation

Maintain Resources > Import Resources

Procedure

1. In the Selection Criterion window, select *Employee* from the Resource Category poplist.

2. If you are importing a single employee, then use the Name field. For groups of employees, search by job title, competencies, or other search criteria.

3. Click Search.

   The employees that match your search criteria appear.

4. Check the check boxes for the employees you want to import as resources into your application.

5. Click Create Resource.

   The Default Values window appears.

6. Click OK.

   The Selected Resources window appears.

7. Check the appropriate check boxes for resources and click Save Resource.

8. If you want to see details for the newly created resource, then click Details.

   See also: Importing Resources, *Oracle CRM Application Foundation Implementation Guide*

Setting Up Employees as Users

Set up individual employees as users of Oracle Customers Online. Four responsibilities are available for OCO users:

- Oracle Customers Online User.

- Oracle Customers Online Superuser. A super user is generally considered the equivalent of a system administrator. All areas of the site are accessible.

- Oracle Customers Online Data Librarian. You can assign multiple users to this responsibility.

- Oracle Customers Online Forms Access. You must assign Forms access to a user for setups related to features such as Party Merge, Data Quality Management (DQM) setup, and concurrent requests for programs and reports.

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

Responsibility	Menu	Access	Menu Exclusion
Oracle Customers Online User	IMC_MAIN_MENU2	Home, Customers, and Reports tabs	Data Cleansing, Import, and Administration tabs
Oracle Customers Online Superuser	IMC_MAIN_MENU2	Home, Customers, Reports, Data Cleansing, Import, and Administration tabs	None
Oracle Customers Online Data Librarian	IMC_MAIN_MENU2	Home, Customers, Reports, Data Cleansing, and Import tabs	Administration tab
Oracle Customers Online Forms Access	IMC Data Librarian Merge Root Menu (IMC_DATA_LIBRARIAN_MERGE_MENU)	Oracle Forms	None
	Requests Menu - Other Responsibilities (FND_REPORT4.0, submenu of IMC Data Librarian Merge Root Menu)	Groups of concurrent requests	None

Responsibility

System Administrator

Navigation

Security > User > Define

Procedure

1. Enter a user name and password. Re-enter the password to verify.

2. Use the Person list of values to select the employee who will be using the user name and password.

3. Assign one or more responsibilities to the user.

> **Note:** Any user who is assigned the Oracle Customers Online Data Librarian or Oracle Customers Online Superuser responsibilities must also be assigned the Oracle Customers Online Forms Access responsibility.

4. Optionally enter an end date only if you want to limit a user's access to the application.

5. Save your work.

> **See also:** Users Window, *Oracle Applications System Administrator's Guide*

Setting Up Address Flexfields

Responsibility

Application Developer

Navigation

Flexfield > Descriptive > Segments

Procedure

1. Run a query using *Oracle Receivables* in the Application field and *Address* in the Title field.

2. Check for the appropriate two-letter country code, such as JP for Japan, in the Code column in the Context Field Values region.

   If the country code does not exist, then uncheck the Freeze Flexfield Definition check box and add the code, flexfield name, and a description. For example, if you are creating an address flexfield for Japan, then you enter the following data in a new row:

   - **Code** - JP

   - **Name** - JP

   - **Description** - Japanese Address Style

3. Select the row for the appropriate code and click Segments.

4. In the Segment Summary window, enter the following values for the first segment:

   - **Name** - Postal Code

   - **Window Prompt** - Postal Code

   - **Column** - POSTAL_CODE

5. Enter values for these segments:

   - Address

   - Country

   - City

   - State or Province

6. To make any field in the segment required or optional, select the segment and click Open, and then check or uncheck the Required check box in the Validation region.

7. To create a list of values for any field in the segment, select the field, click Value Set, and then select or define a list of values in the Value Set Name field.

8. Save your work.

9. In the Descriptive Flexfield Segments window, check the Freeze Flexfield Definition check box.

10. Click Compile to compile the segments for the descriptive flexfield that you created. You can view the compiled descriptive flexfield for addresses in Oracle Sales Administrator or Oracle Receivables.

11. Save your work.

> **See also:** Descriptive Flexfield Segments Window, *Oracle Applications Flexfields Guide*

Compiling Flexfields

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

See also: *Oracle Applications Flexfields Guide*

Setting Up Periodic Concurrent Programs

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

- **IMC: Refresh Summary Information for Reports** - Processes customer information that is then available to be used when one of the Oracle Customers Online reports is requested. Choose a frequency setting based on how often and how much your customer information changes.

- **Refresh of Classification Denormalization** - Runs a complete data refresh to populate the denormalization table as HZ_CLASS_CODE_DENORM.

Responsibility

Oracle Customers Online Superuser

Navigation

Administration > Concurrent Requests

> **See also:** Submitting a Request, *Oracle Applications User's Guide*

Setting Profile Options

Set a value for each profile option to specify how Oracle Customers Online controls access to and processes data.

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

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

- **IMC** - Oracle Customers Online
- **HZ** - Oracle Trading Community Architecture
- **DQM** - Oracle Trading Community Architecture, specifically related to Data Quality Management
- **AMS** - Oracle Marketing Online
- **OS** - Oracle Sales

The following profile options are internally used by Oracle Customers Online and should not be changed or modified in any way:

- Bypass Group Validation
- FUNCTION_SECURITY_REGION
- IMC: Profile for User Access
- OSO: Application Utility Class
- OSO: Disable page level security

Profile Option Descriptions

OS: Customer Access Privilege

This profile option controls user privileges in the Oracle Customers Online pages. By default this profile option is set to *Full* at the Site level. If the default value is changed, then set it to *Full* at the Responsibility or User level for the OCO user.

Profile Options for Bookmarks

IMC: Maximum Number of Contact Bookmarks

Determine the maximum total number of contacts that a user can bookmark.

IMC: Maximum Number of Organization Bookmarks

Determine the maximum total number of organizations that a user can bookmark.

IMC: Maximum Number of People Bookmarks

Determine the maximum total number of people that a user can bookmark.

Profile Options for Classifications

OS: Enable Real Time Denormalization for Customer Classification

Enter *Yes* or *No* to enable or disable denormalization of data. If you set *Yes*, data entered or updated from the Oracle Customers Online Administration tab will be denormalized into the AS_HZ_CLASS_CODE_DENORM table in real time.

Profile Options for De-Duplication

DQM: Match Rule for Address Search

Define the match rule to use for address search in merge request mapping. Based on your search criterion, the match rule determines the addresses from which you can select duplicates to merge.

You can use the seeded match rule DL ADDRESS AND RELATIONSHIP SEARCH. See DL ADDRESS AND RELATIONSHIP SEARCH on page A-3. No matter if you use this or another match rule, the available search criteria remain the same. The match rule is used for scoring and determining search results.

DQM: Match Rule for Identifying Duplicates

Define the match rule to use for identifying duplicates by Smart Search and Registry ID. Based on your search criteria, the match rule determines the potential duplicates from which you can select to create a merge request.

You can use the seeded match rule DL SMART SEARCH. See DL SMART SEARCH on page A-10. If you use a different match rule, the available search criteria are based on the acquisition attributes of that match rule.

DQM: Match Rule for Relationship Search

Define the match rule to use for relationship search in merge request mapping. Based on your search criterion, the match rule determines the relationships from which you can select duplicates to merge.

You can use the seeded match rule DL ADDRESS AND RELATIONSHIP SEARCH. See DL ADDRESS AND RELATIONSHIP SEARCH on page A-3. No matter if you use this or another match rule, the available search criteria remain the same. The match rule is used for scoring and determining search results.

HZ: Match Rule for Address Mapping Suggestions

Define the match rule to use for generating default address mapping suggestions. You can use the seeded match rule DL ADDRESS DEFAULT. See DL ADDRESS DEFAULT on page A-5.

HZ: Match Rule for Relationship Mapping Suggestions

Define the match rule to use for generating default relationship mapping suggestions. You can use the seeded match rule DL RELATIONSHIP DEFAULT. See DL RELATIONSHIP DEFAULT on page A-7.

HZ: Number of Workers for DQM Duplicate Identification Program

Determine the number of parallel workers to use for the DQM Duplicate Identification program. Workers are processes that run at the same time to complete a task that would otherwise take longer with a single process.

For each System Duplicate Identification batch, the DQM Duplicate Identification program generates sets of duplicates from which you can create merge requests.

HZ: Show Address Mapping Suggestions

Enter *Yes* or *No* to determine whether address mapping suggestions are displayed by default or not.

HZ: Show Relationship Mapping Suggestions

Enter *Yes* or *No* to determine whether relationship mapping suggestions are displayed by default or not.

IMC: Display Notes for Merge Request Mapping

Enter *Yes* or *No* to determine if cumulative notes are displayed and used during mapping of merge requests in de-duplication.

Profile Options for Import

AMS : HZ Dedupe Rule

Enter *Yes* or *No* to determine whether de-duplication rules are applied to records imported into TCA.

- **No** - Import of records is still allowed, but no rules are applied to the records.

- **Yes** - Import of records is allowed, and the imported records must conform to the rules selected in the AMS Import Interface Dedupe Rules profile option.

AMS : Import Interface Dedupe Rules

If the AMS : HZ Dedupe Rule profile option is set to *Yes*, this profile option determines the de-duplication rules to apply to imported records.

Profile Options for Recent Items

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

If the IMC: Method for Defining "Recently Created" profile option is set to *Date*, then this profile option restricts how many records should be returned by this method, no matter how many days ago is defined as recent. Recently created for the last ten days could be hundreds of records. You can specify that you want to return the last ten days worth of new records, as defined in the IMC: "Recently Created" Value Definition profile option, but up to 200 records total, as defined in this profile option.

IMC: Maximum Number of Recent Items Displayed

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

IMC: Method for Defining "Recently Created"

Define recent creation for customers, organizations, contacts, and people:

- **Number** - Recent is defined by a certain number of records at a time.

- **Date** - Recent is defined by a certain number of days ago.

IMC: "Recently Created" Value Definition

If the IMC: Method for Defining "Recently Created" profile option is set to *Number*, then this profile option determines the total number of recent records to display. If *Date* was selected, then this profile option specifies the number of days to go back from the system date   (*Recently Created = System Date - Number of Days*). This profile option further defines recent creation for customers, organizations, contacts, and people.

Profile Options for Visualization

IMC: Visualization Solution Type

Enter *NONE* to disable the visualization tool, or enter *OST Applet* to enable visualization, which displays a graphical view of a party's relationships through the visualization applet.

Profile Options Summary

This table indicates whether the user can view or update profile options and at which levels the 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
AMS : HZ Dedupe Rule	Optional	*No*	Update	No Access	No Access	No Access	Update
AMS : Import Interface Dedupe Rules	Conditionally Required	*SRC_ PERSON_ IMPORT*	No Access	No Access	No Access	Update	Update
DQM: Match Rule for Address Search	Required	None	Update	Update	Update	Update	Update
DQM: Match Rule for Identifying Duplicates	Required	None	Update	Update	Update	Update	Update
DQM: Match Rule for Relationship Search	Required	None	Update	Update	Update	Update	Update
HZ: Match Rule for Address Mapping Suggestions	Required	None	Update	Update	Update	Update	Update
HZ: Match Rule for Relationship Mapping Suggestions	Required	None	Update	Update	Update	Update	Update

Profile Options	Value	Default	User Access	System Administrator Access			
				User	Responsibility	Application	Site
HZ: Number of Workers for DQM Duplicate Identification Program	Optional	*3*	Update	Update	Update	Update	Update
HZ: Show Address Mapping Suggestions	Optional	*Yes*	Update	Update	Update	Update	Update
HZ: Show Relationship Mapping Suggestions	Optional	*Yes*	Update	Update	Update	Update	Update
IMC: Display Notes for Merge Request Mapping	Optional	*Yes*	No Access	No Access	No Access	No Access	Update
IMC: Limit on Number of Recently Created Records to show by Date	Conditionally Required	*25*	Update	Update	View Only	Update	Update
IMC: Maximum Number of Contact Bookmarks	Required	*10*	Update	Update	No Access	Update	Update
IMC: Maximum Number of Organization Bookmarks	Required	*10*	Update	Update	No Access	Update	Update
IMC: Maximum Number of People Bookmarks	Required	*10*	Update	Update	No Access	Update	Update
IMC: Maximum Number of Recent Items Displayed	Required	*10*	Update	Update	View Only	Update	Update

Profile Options	Value	Default	User Access	System Administrator Access			
				User	**Responsibility**	**Application**	**Site**
IMC: Method for Defining "Recently Created"	Required	*Number*	Update	Update	No Access	Update	Update
IMC: "Recently Created" Value Definition	Required	*25*	Update	Update	View Only	Update	Update
IMC: Visualization Solution Type	Required	*OST Applet*	Update	Update	No Access	Update	Update
OS: Customer Access Privilege	Required	*Full*	No Access	Update	Update	No Access	Update
OS: Enable Real Time Denormalization for Customer Classification	Optional	*Yes*	View Only	No Access	No Access	No Access	Update

Verifying Implementation

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

Responsibility

Oracle Customers Online Superuser

Procedure

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

2

Feature-Specific Implementation

This chapter describes implementation of specific features in Oracle Customers Online.

Feature-Specific Implementation Overview

Oracle Customers Online provides many features for you to view and   manage your customer information. To use these features, you can set up and administer:

- **Relationships** - Create and manage the relationship types, phrases, and roles that relationships among your customers are based on. See Setting Up Relationships on page 2-4.

- **Classifications** - Create and manage the class categories and codes that classifications for your customers are based on. See Setting Up Classifications on page 2-6.

- **Data Quality Management** - Set up the tools that power search, match, duplicate identification, and other functionality in Oracle Customers Online as well as other Oracle applications.

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

- **Enrichment** - Integrate Oracle Customers Online with D&B so that users can access D&B information and enrich your customer information. In addition, youcancontrolhowthirdpartyanduser-entereddataare displayed, created, and overwritten.

    See also: Administering Third Party Data Integration, *Oracle Trading Community Architecture Administration User Guide*

- **Data Sharing and Security** - Control the access privileges of users to create, update, or delete data in Oracle Customers Online.

    See also: Administering Data Sharing and Security, *Oracle Trading Community Architecture Administration User Guide*

    Note: To use the Administration tab to set up and administer the above features, you must have the Oracle Customers Online Superuser responsibility.

- **De-duplication** - Set up for the Oracle Customers Online de-duplication feature. See Setting Up De-Duplication on page 2-8.

- **XML Web Services** - Set up XML Web Services to enable application-to-application integration between the Oracle customer repository and legacy or third-party enterprise systems.

> **See also:** Web Services Implementation, *Oracle Trading Community Architecture Oracle Customers Online XML Web Services User Guide*

Setting Up Relationships

Oracle Customers Online captures both business and personal relationships between any parties in the database and between outside parties and your internal organizations. You can capture a wide variety of relationships, including:

- Business relationships between two individuals, such as reporting relationships.

- Personal relationships between two individuals, such as parent and child relationships.

- Relationships between individuals and organizations, such as employment relationships.

- Relationships between different organizations, such as corporate hierarchy relationships.

- Relationships between outside organizations and your own internal organizations, such as competitive relationships.

There is no limit to the number of relationships or the combination of relationships for any one person or organization. Relationships are created based on relationship phrase and role pairs, which are categorized by relationship types.

Aside from using the seeded relationship types, phrases, and roles to create relationships, you can also create your own or add phrase and role pairs to seeded types.

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

Responsibility
Oracle Customer Online Superuser

Navigation
Administration > Setup > Relationships

Procedure

■ Create relationship types.

> **See also:** Creating Relationship Types, *Oracle Trading Community Architecture Administration User Guide*

Your new relationship type and phrase and role pair can be used in OCO or any other Oracle Applications e-Business Suite application that allows for the creation of party relationships.

Remember that your relationship phrase and role pair will not show up in all relationship lists of values in OCO. For example, if you have created a relationship phrase and role pair with Organization as the subject and object type, the phrase or role will only show up when you are creating a relationship between two organizations.

■ Add relationship phrase and role pairs to seeded or custom relationship types.

> **See also:** Adding Relationship Phrase and Role Pairs to Relationship Types, *Oracle Trading Community Architecture Administration User Guide*

■ Assign relationship phrase and role pairs to relationship groups.

> **See also:** Assigning Relationship Phrases and Roles to Relationship Groups, *Oracle Trading Community Architecture Administration User Guide*

Setting Up Classifications

You can use classifications to classify parties or other business entities into various categories. A classification includes a class category and a class code. The class category is a broad subject within which you can classify parties. The class code is a specific value of the category.

> **See also:** Classifications Overview, *Oracle Trading Community Architecture Administration User Guide*

For example, if you want to know 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 standard industrial classification codes. You can also define your class categories for your own purposes. For example, you can define a class category to determine if there is a special business consideration, special pricing arrangement, or special term for a party.

Prerequisites

To create your own system of classification for your customers, you must design the system first and should have a printout ready before you start this procedure. You should know the parents and children of each classification node in the class code hierarchy before you create them.

You might want to name your class codes in a way that will help you find all of the child nodes for each level of the class code hierarchy. If the names for class codes at the same level share the same characters, then you can find and add them as children all at the same time.

Responsibility

Oracle Customers Online Superuser

Navigation

Administration > Setup > Classification

Procedure

1. Create class categories.

   > **See also:**   Creating a Class Category, *Oracle Trading Community Architecture Administration User Guide*

2. Create class codes, including assigning parent class codes if you want to build a class code hierarchy.

   > **See also:**   Creating a Class Code, *Oracle Trading Community Architecture Administration User Guide*

3. Set up the Refresh of Customer Classification Denormalization program to perform a data refresh that will populate the AS_HZ_CLASS_CODE_DENORM denormalization table. See Setting Up Periodic Concurrent Programs on page 1-12.

   Under the following circumstances, you will need to manually run the concurrent program:

   - The first time you install the patch which contains the classification feature.

   - Every time you enter or update classification related data that is not updated from the Oracle Customers Online Administration tab. For example, the concurrent programs should be run if you enter or update lookups in Oracle Receivables.

   - Every time you install a HZ or FND patch that has added more seeded data for classifications.

   - If the OS: Enable Real Time Denormalization for Customer Classification profile option is set to *No.* This setting means that data entered or updated from the Oracle Customers Online Administration tab is not denormalized in real time. See Profile Options for Classifications on page 1-14.

4. Set the OS: Enable Real Time Denormalization for Customer Classification profile option. See Profile Options for Classifications on page 1-14.

   > **Note:**   In order to see the changes you have made, you must bounce the middle tier.

Setting Up De-Duplication

De-duplication uses Oracle Trading Community Architecture Data Quality Management (DQM) for:

- Identifying duplicates using Smart Search.

- Identifying duplicates using System Duplicate Identification.

- Searching for addresses or relationships to map.

- Generating suggested defaults for address mapping.

- Generating suggested defaults for relationship mapping.

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

Most of the setup for de-duplication involves setting up DQM for the above purposes.

Procedure

1. Assign users to the Oracle Customers Online Data Librarian responsibility. See Setting Up Employees as Users on page 1-7.

2. Set up Data Quality Management.

   Optionally create match rules for any of the four purposes mentioned above for using DQM. Seeded match rules, however, are available. See Seeded Match Rules on page A-2.

   If you create a new rule for identifying duplicates using Smart Search, the search criteria are based on your acquisition attributes.

   For address and relationship search, the search criteria are always the same. The match rule affects only the scoring. Your custom match rules should have the same scoring attributes as the DL ADDRESS AND RELATIONSHIP SEARCH match rule, the seeded match rule for this purpose.

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

3. Define profile options:

   - DQM: Match Rule for Address Search

   - DQM: Match Rule for Identifying Duplicates

   - DQM: Match Rule for Relationship Search

   - HZ: Match Rule for Address Mapping Suggestions

   - HZ: Match Rule for Relationship Mapping Suggestions

   - HZ: Number of Workers for DQM Duplicate Identification Program

   - HZ: Show Address Mapping Suggestions

   - HZ: Show Relationship Mapping Suggestions

   - IMC: Display Notes for Merge Request Mapping

   See Setting Profile Options for De-Duplication on page 1-14.

4. If you have third party data in the TCA Registry and are using Third Party Data Integration rules, make sure that third party data can be overwritten in the de-duplication process.

   a. Create a user overwrite rule that allows update of all attributes.

      See also: Setting Up User Overwrite Rules, *Oracle Trading Community Architecture Administration User Guide*

   b. Set the HZ: User Overwrite Rule profile option at one or more levels using the rule that you created. If this profile option is set at the responsibility level, make sure that a conflicting or different rule is not set at the user level.

      See also: Profile Options in Enrichment, *Oracle Trading Community Architecture Administration User Guide*

A

Seeded Match Rules

This appendix describes the seeded match rules that you can use to set up Oracle Customers Online.

Seeded Match Rules

Five seeded match rules are provided specifically for de-duplication. You can use or base your custom match rules on any of these:

- DL ADDRESS AND RELATIONSHIP SEARCH, on page A-3
- DL ADDRESS DEFAULT, on page A-5
- DL RELATIONSHIP DEFAULT, on page A-7
- DL SMART SEARCH, on page A-10
- DL SYSTEM DUPLICATE IDENTIFICATION, on page A-12

You can use these seeded match rules for profile options used to set up de-duplication. See Setting Up De-Duplication on page 2-8 and Setting Profile Options on page 1-13.

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

> **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*

DL ADDRESS AND RELATIONSHIP SEARCH

The DL ADDRESS AND RELATIONSHIP SEARCH match rule searches for addresses or relationships for merge request mapping.

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
Name	Party	No	WR NAMES + CLEANSE
			WR NAMES + CLUSTER
			REV + WR NAMES + CLEANSE
Address	Address	No	CLEANSE
			WR ADDRESS + CLEANSE
Country	Address	No	EXACT
Registry ID	Party	No	EXACT
Party Type	Party	No	EXACT

Scoring

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

Threshold	Value
Match Threshold	50
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	50	SOUNDEX	100	Exact	
			EXACT STRING	100	Exact	
			WR NAMES	90	Exact	
			WR NAMES + CLEANSE	70	Similarity	75
Address	Address	50	CLEANSE	100	Exact	
			EXACT	100	Exact	
			WR ADDRESS	100	Exact	
			WR ADDRESS + CLEANSE	70	Exact	
Country	Address	50	EXACT	100	Exact	
Registry ID	Party	50	EXACT	100	Exact	
Party	Party	5	EXACT	100	Exact	

DL ADDRESS DEFAULT

The DL ADDRESS DEFAULT match rule identifies duplicate addresses as default suggestions for mapping addresses in merge requests.

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
Address	Address	No	CLEANSE
			WR ADDRESS + CLEANSE
City	Address	No	CLEANSE
State	Address	No	WR STATE
			WR STATE + CLEANSE
Province	Address	No	CLEANSE
Postal Code	Address	No	EXACT
County	Address	No	CLEANSE
Country	Address	No	EXACT

Scoring

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

Threshold	Value
Match Threshold	80
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 (%)
Postal Code	Address	65	EXACT	100	Exact	
City	Address	50	CLEANSE	100	Exact	
			EXACT	100	Exact	
State	Address	25	EXACT	100	Exact	
			WR STATE	100	Exact	
			WR STATE + CLEANSE	100	Exact	
Address	Address	100	EXACT	100	Exact	
			CLEANSE	100	Exact	
			WR ADDRESS	100	Exact	
			WR ADDRESS + CLEANSE	70	Exact	
Province	Address	25	EXACT	100	Exact	
			CLEANSE	100	Exact	
Country	Address	10	EXACT	100	Exact	
County	Address	25	CLEANSE	100	Exact	
			EXACT	100	Exact	

DL RELATIONSHIP DEFAULT

The DL RELATIONSHIP DEFAULT match rule identifies duplicate relationships as default suggestions for mapping relationships in merge requests.

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
Name	Party	No	REVERSE
			SOUNDEX
			CLEANSE
			CLUSTER
			WR NAMES + CLEANSE
			WR NAMES + CLUSTER
			REV + WR NAMES + CLEANSE
			REV + WR NAMES + CLUSTER
Address	Address	No	WR ADDRESS + CLEANSE
Postal Code	Address	No	EXACT
E-Mail Address	Contact Point	No	CLEANSE (EMAIL)
Tax Registration Num	Party	No	EXACT
Phone Number	Contact Point	No	EXACT
			REVERSE
Job Title	Contact	No	EXACT

Attribute Name	Entity	Filter	Transformation
Person Name	Party	No	CLEANSE
			CLUSTER
			REV + WR PER + CLEANSE
			REV + WR PER + CLUSTER
			REVERSE
			WR PERSON + CLEANSE
			WR PERSON + CLUSTER

Scoring

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

Threshold	Value
Match Threshold	55
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	50	EXACT STRING	100	Exact	
			WR NAMES	90	Exact	
			REVERSE	80	Exact	
			WR NAMES + CLEANSE	60	Similarity	75
E-Mail Address	Contact Point	50	EXACT (EMAIL)	100	Exact	
			CLEANSE (EMAIL)	70	Exact	
Phone Number Flexible Format	Contact Point	50	EXACT	100	Exact	
Address	Address	30	WR ADDRESS + CLEANSE	70	Exact	
			WR ADDRESS	100	Exact	

Attribute Name	Entity	Score	Transformation	Weight (%)	Type	Similarity (%)
Postal Code	Address	20	EXACT	100	Exact	
Tax Registration Num	Party	70	EXACT	100	Exact	
Job Title	Contact	10	EXACT	100	Exact	
Phone Number	Contact Point	50	EXACT	100	Exact	
			REVERSE	100	Exact	
Person Name	Party	50	CLEANSE	100	Exact	
			CLUSTER	100	Exact	
			EXACT	100	Exact	
			EXACT STRING	100	Exact	
			REV + WR PER + CLEANSE	100	Exact	
			REV + WR PER + CLUSTER	100	Exact	
			REVERSE	100	Exact	
			WR PERSON	100	Exact	
			WR PERSON + CLEANSE	100	Exact	
			WR PERSON + CLUSTER	100	Exact	

DL SMART SEARCH

The DL SMART SEARCH match rule can be used for Smart Search to search for potential duplicate parties from which you create merge requests.

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
			CLEANSE
			CLUSTER
Party Type	Party	No	EXACT
SIC Code	Party	No	EXACT
Address	Address	No	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	100
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	100	CLEANSE	70	Exact	
			EXACT	100	Exact	
			CLUSTER	50	Exact	
			SOUNDEX	100	Exact	
			WR NAMES	100	Exact	
Registry ID	Party	100	EXACT	100	Exact	
Party Type	Party	10	EXACT	100	Exact	
SIC Code	Party	20	EXACT	100	Exact	
Address	Address	25	CLEANSE	100	Exact	
City	Address	10	CLEANSE	100	Exact	
State	Address	5	WR STATE	100	Exact	
Country	Address	5	EXACT	100	Exact	

DL SYSTEM DUPLICATE IDENTIFICATION

The DL SYSTEM DUPLICATE IDENTIFICATION match rule can be used for System Duplicate Identification to identify duplicate parties to include in SDI batches.

Acquisition

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

Attribute Match: Match Any Attribute

Attribute Name	Entity	Filter	Transformation
Registry ID	Party	No	EXACT
Name	Party	No	WR NAMES + CLEANSE SOUNDEX
Party Type	Party	No	EXACT
SIC Code	Party	No	EXACT
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	100
Override Threshold	
Automatic Merge Threshold	100

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	100	WR NAMES	100	Exact	
			SOUNDEX	70	Exact	
			WR NAMES + CLEANSE	80	Exact	
Registry ID	Party	100	EXACT	100	Exact	
Party Type	Party	10	EXACT	100	Exact	
SIC Code	Party	20	EXACT	100	Exact	
Address	Address	25	WR ADDRESS + CLEANSE	100	Exact	
City	Address	10	CLEANSE	100	Exact	
State	Address	5	WR STATE	100	Exact	
Country	Address	5	EXACT	100	Exact	