

Oracle® Data Librarian

Implementation Guide

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Oracle Data Librarian Implementation Guide, Release 11i

Part No. B12313-01

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Preface

Welcome to Release 11*i* of the *Oracle Data Librarian Implementation Guide*.

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

- The principles and customary practices of your business area.
- Oracle Data Librarian.
- 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 Data Librarian Implementation Guide* contains the information you need to implement Oracle Data Librarian.

- Chapter 1 describes implementing Oracle Data Librarian, including assigning responsibilities to users, setting up profile options, and setting up de-duplication.

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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 Data Librarian.

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.
- **About Document** - Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on MetaLink.

Related Guides

Oracle Data Librarian 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 Data Librarian.

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 Data Librarian (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 Data Librarian User Guide

Use this user guide to learn how to use Oracle Data Librarian to establish and maintain the quality of your customer database, focusing on consolidation, cleanliness, and completeness. The user guide describes the application and features that you are implementing for.

Oracle Customers Online Implementation Guide

Use this guide to learn how to implement Oracle Customers Online. As part of the implementation of Oracle Data Librarian, you must complete all the implementation steps for Oracle Customers Online.

Oracle Customers Online User Guide

Use this guide to learn how to use Oracle Customers Online to view, create, and manage customer information for organizations and persons. Oracle Data Librarian includes all of the features in Oracle Customers Online.

Oracle Trading Community Architecture Administration Guide

Use this guide to administer and implement Oracle Trading Community Architecture. You set up, control, and manage TCA tools, functionality, and concepts that affect data in TCA Registry. These administration features are available from the Administration tab in Oracle Data Librarian.

Oracle Trading Community Architecture Reference Guide

This reference guide contains seeded relationship types, seeded Data Quality Management data, D&B data elements, Bulk Import interface table fields and validations, and a comprehensive glossary. This guide supplements the documentation for Oracle Trading Community Architecture and individual products in the Oracle Customer Data Management family.

Oracle Trading Community Architecture User Guide

User this user guide to learn about Oracle Trading Community Architecture and how to use features from the Trading Community Manager responsibility to create, update, enrich, and cleanse the data in the TCA Registry.

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

Use this user guide to learn how 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 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 Common Application Components Implementation Guide

Many products use components from Oracle Common Application Components. Use this guide to correctly implement Oracle Common Application Components.

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 Data Librarian. This manual details additional steps and setup considerations for implementing Oracle Data Librarian with this feature.

Multiple Organizations in Oracle Applications

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

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 Data Librarian 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 Data Librarian 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 Data Librarian working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

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Implementation

This chapter describes implementing Oracle Data Librarian, including:

- Assigning responsibilities to users
- Setting up profile options
- Setting up de-duplication

Overview

Oracle Data Librarian (ODL) includes all of the functionality of Oracle Customers Online (OCO), with additional features for maintaining the quality of customer data. You must complete all of the steps for implementing OCO, as well as perform the ODL implementation described in this guide.

See Also: *Oracle Customers Online Implementation Guide*

- Assigning Responsibilities to Users on page 1-3
- Setting Profile Options on page 1-5
- Feature-Specific Implementation on page 1-11

Oracle Data Librarian, along with OCO, is part of the Oracle Customer Data Management (CDM) product family. All CDM applications are based on the data model and functionality of Oracle Trading Community Architecture (TCA). For reference material that supplements not only TCA but ODL implementation, see *Oracle Trading Community Architecture Reference Guide*.

Assigning Responsibilities to Users

Set up individual users of Oracle Data Librarian. These responsibilities are available for ODL users:

- **Oracle Customers Online Data Librarian:** Access to all features except the Administration tab.
- **Oracle Customers Online Data Librarian Superuser:** Access to all areas of the site, with view-only privileges for Data Sharing and Security (DSS) administration. A superuser is generally considered the equivalent of a system administrator.
- **Oracle Customers Online Import:** Access to the Import tab. You should assign this responsibility along with Oracle Customers Online Data Librarian or Oracle Customers Online Data Librarian Superuser to users who need to import data.
- **TCA Data Security Administrator:** Administration privileges for Data Sharing and Security. Assign this responsibility along with Oracle Customers Online Data Librarian Superuser to users who need to administer DSS.

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

Responsibility	Menu	Access	Menu Exclusion
Oracle Customers Online Data Librarian	IMC_MAIN_MENU2	Home, Customers, Reports, and Data Cleansing tabs	Administration tab
Oracle Customers Online Data Librarian Superuser	IMC_MAIN_MENU2	Home, Customers, Reports, Data Cleansing, and Administration tabs	None
Oracle Customers Online Import	IMC_AMS_IMPORT_MENU	Import tab	None
TCA Data Security Administrator	HZ Security Main Menu	View, create, update, and delete privileges for Data Sharing and Security administration	None

Responsibility

System Administrator

Navigation

Security > User > Define

Procedure

1. Enter a user name and password. Reenter the password to verify.
2. Use the Person list of values to select the user who will be using the user name and password.
3. Assign one or more responsibilities to the user.
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*

See Also

Overview on page 1-2

Setting Profile Options

Set a value for each profile option to specify how Oracle Data Librarian 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 Data Librarian or Oracle Customers Online
- **HZ:** Oracle Data Librarian or Oracle Trading Community Architecture
- **Concurrent:** Oracle Application Object Library, specifically related to concurrent programs

See Also

Profile Options for De-Duplication on page 1-6

Profile Option Access and Defaults on page 1-9

Overview on page 1-2

Profile Options for De-Duplication

See Also: De-Duplication Overview, *Oracle Data Librarian User Guide*

Concurrent: Report Access Level

To allow users with the Oracle Customers Online Data Librarian and Oracle Customers Online Data Librarian Superuser responsibilities to view one another's merge requests, set this profile option to *Responsibility* at either the user or responsibility level.

If set at the user level for a particular user, that user will be able to see merge requests and System Duplicate Identification (SDI) batches created by all other users having one of the two Oracle Data Librarian responsibilities. If set at the responsibility level, all users having either of those responsibilities can view one another's merge requests and SDI batches.

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 Also: DL ADDRESS DEFAULT, *Oracle Trading Community Architecture Reference Guide*

HZ: 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. 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.

See Also: DL ADDRESS AND RELATIONSHIP SEARCH, *Oracle Trading Community Architecture Reference Guide*

HZ: Match Rule for Identifying Duplicates

Define the match rule to use for identifying duplicates by Smart Search. 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. If you use a different match rule, the available search criteria are based on the acquisition attributes of that match rule.

See Also: DL SMART SEARCH, *Oracle Trading Community Architecture Reference Guide*

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 Also: DL RELATIONSHIP DEFAULT, *Oracle Trading Community Architecture Reference Guide*

HZ: 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. 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.

See Also: DL ADDRESS AND RELATIONSHIP SEARCH, *Oracle Trading Community Architecture Reference Guide*

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.

See Also

Setting Profile Options on page 1-5

Profile Option Access and Defaults

This table shows whether the profile option is required or not and displays the default profile option value, or *No Default* if none exists. A required profile option must have an entered or default value for its related feature to function properly.

The User Access column indicates if you can view or update the profile option. The System Admin Access: User Level, Responsibility Level, Application Level, and Site Level columns show the type of access your system administrator has for setting the profile option at each level.

The available types of profile option access for users and system administrators are:

- **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 Option	Required	Default	User Access	System Admin Access: User Level	System Admin Access: Responsibility Level	System Admin Access: Application Level	System Admin Access: Site Level
Concurrent: Report Access Level	Optional	No Default	View Only	Update	Update	No Access	Update
HZ: Match Rule for Address Mapping Suggestions	Required	No Default	Update	Update	Update	Update	Update
HZ: Match Rule for Address Search	Required	No Default	Update	Update	Update	Update	Update
HZ: Match Rule for Identifying Duplicates	Required	No Default	Update	Update	Update	Update	Update

Profile Option	Required	Default	User Access	System Admin Access: User Level	System Admin Access: Responsibility Level	System Admin Access: Application Level	System Admin Access: Site Level
HZ: Match Rule for Relationship Mapping Suggestions	Required	No Default	Update	Update	Update	Update	Update
HZ: Match Rule for Relationship Search	Required	No Default	Update	Update	Update	Update	Update
HZ: Number of Workers for DQM Duplicate Identification Program	Required	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

See Also

Setting Profile Options on page 1-5

Feature-Specific Implementation

Oracle Data Librarian provides many features for you to maintain quality customer data. To use these features, you can set up and administer:

- **De-Duplication:** Set up for the Oracle Data Librarian de-duplication feature. See Setting Up De-Duplication on page 1-12.
- TCA features that are used or integrated into Oracle Data Librarian, including:
 - **Third Party Data Integration:** Integrate Oracle Data Librarian with D&B so that data librarians can access D&B information to enrich your customer information. In addition, you can control how third party and user-entered data are displayed, created, and overwritten.
 - **Data Sharing and Security:** Control the access privileges of users to create, update, or delete customer data.
 - **Source System Management:** Set up for mappings between external source systems and your customer data.

See Also: Introduction, *Oracle Trading Community Architecture Administration Guide*

Most of the TCA administration features are available from the Administration tab. You must have the Oracle Customers Online Data Librarian Superuser responsibility to access that tab.

See Also

Overview on page 1-2

Setting Up De-Duplication

De-duplication uses Data Quality Management (DQM) for:

- Identifying duplicates using Smart Search.
- Identifying duplicates using System Duplicate Identification batches.
- Searching for specific addresses or relationships, within a single party or a set of duplicate parties, for mapping purposes.
- Generating suggested defaults for address mapping.
- Generating suggested defaults for relationship mapping.

Most of the implementation for de-duplication involves DQM setups for the above purposes.

See Also: Data Quality Management Overview, *Oracle Trading Community Architecture Administration Guide*

See Also: De-Duplication Overview, *Oracle Data Librarian User Guide*

Procedure

1. Assign users to the Oracle Customers Online Data Librarian or Oracle Customers Online Data Librarian Superuser responsibility. See Assigning Responsibilities to Users on page 1-3.
2. Set up Data Quality Management.

See Also: Administering Data Quality Management, *Oracle Trading Community Architecture Administration Guide*

Optionally create match rules for any of the five purposes mentioned above for using DQM. Seeded match rules, however, are available.

See Also: Feature Specific Match Rules, *Oracle Trading Community Architecture Reference Guide*

- If you create a new rule for identifying duplicates using Smart Search, the search criteria shown in the user interface will change based on your acquisition attributes.

- For searching for addresses and relationships for mapping, 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, which is the seeded match rule for this purpose.
3. Optionally use the DUP_BATCH_RESTRICTION_LIST Receivables lookup to define the list of attributes that appear in the System Duplicate Identification Batches page. For example, you can add a custom attribute to the list. These attributes are used as restriction criteria for creating SDI batches.

See Also: *Defining Receivables Lookups, Oracle Receivables User Guide*

4. Define profile options:
 - Concurrent: Report Level Access
 - HZ: Match Rule for Address Mapping Suggestions
 - HZ: Match Rule for Address Search
 - HZ: Match Rule for Identifying Duplicates
 - HZ: Match Rule for Relationship Mapping Suggestions
 - HZ: Match Rule for Relationship Search
 - 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 Profile Options for De-Duplication on page 1-6.

5. 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 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: *Third Party Data Integration Profile Options, Oracle Trading Community Architecture Administration Guide*

See Also

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