

Oracle® Customers Online

Implementation Guide

Release 11*i*

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Oracle Customers Online Implementation Guide, Release 11i

Part No. A96193-04

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Oracle Customers Online Implementation Guide, Release 11i

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Preface

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

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.

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

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

How To Use This Guide

The Oracle Customers Online Implementation Guide contains the information you need to implement Oracle Customers Online. This guide contains two chapters:

- Chapter 1 describes general implementation of Oracle Customers Online.
- Chapter 2 describes implementation of specific features in Oracle Customers Online.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including 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).

- **PDF Documentation** - See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on *OracleMetaLink* and is updated frequently.
- **Online Help** - Online help patches are available on *OracleMetaLink*.
- **11i Release Content Document** - Refer to the Release Content Document for new features listed release. The Release Content Document is available on *OracleMetaLink*.
- **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 *OracleMetaLink*.

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). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

Oracle Customers Online User Guide

This user guide describes how to use Oracle Customers Online (OCO) to view, create, and maintain your customer information in the TCA Registry. The user guide describes the application and features that you are implementing for.

Oracle Trading Community Architecture Administration Guide

Use this guide to administer and implement Oracle Trading Community Architecture (TCA). You set up, control, and manage TCA tools, functionality, and concepts that affect data in TCA Registry, which Oracle Customers Online uses. Most of these administration features are available from the Administration tab in OCO.

Oracle Trading Community Architecture Reference Guide

This reference guide contains seeded relationship types, seeded Data Quality Management data, D&B data elements, 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, including Oracle Customers Online.

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 Customers Online is based on the TCA data model and functionality.

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. Oracle Data Librarian includes all of the features in Oracle Customers Online, and is used to merge the potential duplicates identified in OCO.

Oracle Data Librarian Implementation Guide

Use this user guide to learn how to implement Oracle Data Librarian.

Oracle Receivables User Guide

This guide provides more information on functionality for accounts, credit summaries, debit items, and credit items that you can access from Oracle Customers Online. The guide also describes setup steps to perform as part of implementing OCO.

Oracle Marketing User Guide

This guide provides more information on functionality for campaigns and events that you can access from Oracle Customers Online, as well as the import feature from the Import tab. The guide also describes profile options that are part of setting up for import.

Oracle General Ledger User Guide

This guide describes using and setting up Oracle General Ledger. Some of the setup steps are also required as prerequisites for implementing Oracle Customers Online, for example, setting up sets of books and currencies.

Oracle Inventory User's Guide

This guide describes setting up Oracle Inventory, which is a prerequisite application that should be set up for Oracle Customers Online.

Managing Your Workforce Using Oracle HRMS

This guide describes using Oracle HRMS, including creating employees who are used in Oracle Customers Online.

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 Common Application Components User's Guide

This document covers how to use various components in Oracle Customers Online, such as features for notes, tasks, calendars, employees, and attachments.

Oracle Collections User Guide

This guide provides more information on functionality for broken promises and delinquencies that you can access from Oracle Customers Online.

Oracle Customer Interaction History Implementation Guide

This guide provides more information on functionality for interactions that you can access from Oracle Customers Online.

Oracle Install Base Concepts and Procedures

This guide provides more information on functionality for installed base that you can access from Oracle Customers Online.

Oracle Order Management User's Guide

This guide provides more information on functionality for orders that you can access from Oracle Customers Online.

Oracle Quoting User Guide

This guide provides more information on functionality for quotes that you can access from Oracle Customers Online.

Oracle Sales Online User Guide

This guide provides more information on functionality for opportunities that you can access from Oracle Customers Online.

Oracle TeleService User Guide

This guide provides more information on functionality for service requests that you can access from Oracle Customers Online.

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 and the 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's 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.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on *OracleMetaLink* for most products starting with Release 11.5.8.

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 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.

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.

Implementing Oracle HRMS

This guide provides information for setting up Oracle HRMS, including defining organization structures, which is a prerequisite step to implementing Oracle Customers Online.

Oracle Order Management Suite Implementation Manual

This guide provides information for setting up Oracle Order Management, including setting up the Item Validation Org parameter, which is a prerequisite step for implementing Oracle Customers Online.

Other Implementation Documentation

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow 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 Oracle *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 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 Oracle 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 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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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

Overview

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

See Also: *Oracle Customers Online User Guide*

OCO is:

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

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

Aside from specific implementation for OCO, you can also use the Administration tab to administer functionality that affects not only OCO but all Oracle e-Business Suite applications that use TCA.

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

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

See Also

Dependencies on page 1-4

Implementation Steps

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

General implementation of Oracle Customers Online includes:

1. Setting Up Prerequisite Applications on page 1-6
2. Creating Employees on page 1-8
3. Setting Up Employees as Users on page 1-10
4. Setting Up Address Flexfields on page 1-12
5. Setting Up Periodic Programs on page 1-15
6. Setting Profile Options on page 1-16
7. Verifying Implementation on page 1-25

See Also

Feature-Specific Implementation Overview on page 2-2

Dependencies

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

See Also

Overview on page 1-2

Mandatory Dependencies

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

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

Optional Dependencies

This table shows optional dependencies, listing the related application and the features or data in OCO that depend on that application.

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

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*

See Also

Overview on page 1-2

Creating Employees

You must create the individuals who will be using Oracle Customers Online as employees before you can set them up as users. You can also import employees. See *Importing Employees* on page 1-9.

See Also

Overview on page 1-2

With Full Oracle Human Resources (HRMS) Installation

Responsibility

US HRMS Manager

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

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

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 Common Application Components Implementation Guide*

See Also

Creating Employees on page 1-8

Setting Up Employees as Users

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

- **Oracle Customers Online User:** A general user of OCO.
- **Oracle Customers Online Superuser:** Generally considered the equivalent of a system administrator. All areas of the site are accessible.
- **Oracle Customers Online Import:** Access to the Import tab. You should assign this responsibility along with Oracle Customers Online User or Oracle Customers Online Superuser to users who need to import data into OCO.
- **Oracle Customers Online Forms Access:** Access to Party Merge, Customer Account Merge, and Oracle Customers Online lookups. Other included features are Data Quality Management setup and D&B integration, which users can also access from the Oracle Customers Online Superuser responsibility. You should assign the Oracle Customers Online Forms Access responsibility to all users who are assigned Oracle Customers Online Superuser.
- **TCA Data Security Administrator:** Administration privileges for Data Sharing and Security (DSS). Assign this responsibility along with Oracle Customers Online Superuser to users who need to administer DSS.

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

Responsibility	Menu	Access	Menu Exclusion
Oracle Customers Online User	IMC_NG_ROOT_MENU	Home, Customers, and Reports tabs	Administration and Data Quality tabs
Oracle Customers Online Superuser	IMC_NG_ROOT_MENU	Home, Customers, Reports, and Administration tabs	Data Quality tab
Oracle Customers Online Import	IMC_AMS_IMPORT_MENU	Import tab	None
Oracle Customers Online Forms Access	IMC Data Librarian Merge Root Menu	Party Merge, Data Quality Management, Account Merge, Dun & Bradstreet, Requests, Oracle Customers Online lookups	None
TCA Data Security Administrator	HZ Security Main Menu	View, create, update, and delete privileges for Data Sharing and Security administration	None

Responsibility

System Administrator

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

See Also

Overview on page 1-2

Setting Up Address Flexfields

Responsibility

Application Developer

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*

See Also

Overview on page 1-2

Compiling Flexfields

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

Responsibility

Application Developer

See Also: *Oracle Applications Flexfields Guide*

See Also

Setting Up Address Flexfields on page 1-12

Setting Up Periodic Programs

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

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

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

- **Refresh of Classification Denormalization:** Runs a complete data refresh to populate the HZ_CLASS_CODE_DENORM denormalization table. See Setting Up Classifications on page 2-5.

See Also

Overview on page 1-2

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
- **AMS:** Oracle Marketing

Many of the profile options in Oracle Trading Community Architecture are applicable to OCO, especially for features in the Administration tab.

See Also: *Setting Profile Options, Oracle Trading Community Architecture Administration Guide*

The following profile options are not used or are internally used by Oracle Customers Online. Do not modify their settings in any way.

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

Responsibility

System Administrator

See Also

Profile Option Descriptions on page 1-17

Profile Option Access and Defaults on page 1-22

Overview on page 1-2

Profile Option Descriptions

These profile options are available for you to set up for Oracle Customers Online:

- Bookmarked Lists Profile Options on page 1-17
- Duplicate Identification Profile Option on page 1-18
- Duplicate Prevention Profile Options on page 1-18
- Import Profile Options on page 1-19
- Recent Items Profile Option on page 1-19
- Relationships Profile Option on page 1-19
- Reports Profile Option on page 1-19
- Search Profile Options on page 1-20
- Source System Management Profile Option on page 1-21
- Third Party Data Integration Profile Option on page 1-21

See Also

Setting Profile Options on page 1-16

Bookmarked Lists Profile Options

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.

See Also: *Bookmarked Lists, Oracle Customers Online User Guide*

Duplicate Identification Profile Option

HZ: Allow Access to Submit Merge Requests

Determine access to marking potential duplicate organizations or persons to submit as a merge request to Oracle Data Librarian. Set this profile option to *Yes* only if your organization uses Oracle Data Librarian.

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

Duplicate Prevention Profile Options

Note: Make sure that the seeded or user-defined match rules you assign to profile options below are compiled.

See Also: *Compiling Match Rules, Oracle Trading Community Architecture Administration Guide*

HZ: Enable Duplicate Prevention at Party Creation

Determine if duplicate prevention is enabled for organizations, persons, both, or neither. You can enable for organizations or persons only if you provide match rules for the appropriate profile options below.

HZ: Match Rule for Organization Duplicate Prevention

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

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

HZ: Match Rule for Person Duplicate Prevention

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

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

See Also

Setting Up Duplicate Prevention on page 2-7

Import Profile Options**AMS : HZ Dedupe Rule**

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.

Recent Items 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.

See Also: Recent Items, *Oracle Customers Online User Guide*

Relationships Profile Option**HZ: Allow Hierarchy Copy**

Determine whether copying of relationship hierarchies is allowed or not.

See Also: Copying Hierarchies, *Oracle Customers Online User Guide*

Reports Profile Option**IMC: Enable Manage Reports**

Determine access privileges to manage Data Completeness reports. You should set this profile option to *Yes* for the Oracle Customers Online Superuser responsibility, and *No* for the Oracle Customers Online User responsibility.

See Also: Managing Data Completeness Reports, *Oracle Customers Online User Guide*

Search Profile Options

Note: Make sure that the seeded or user-defined match rules you assign to profile options below are compiled.

See Also: *Compiling Match Rules, Oracle Trading Community Architecture Administration Guide*

HZ: Enable DQM Party Search

Determine whether Data Quality Management (DQM) is enabled for organization and person searches. Set this profile option to *Yes* only if you provide a match rule for at least one of the following four profile options. DQM search is enabled only for searches that have an assigned match rule.

HZ: Match Rule for Organization Advanced Search

Specify the seeded or user-defined match rule for determining the search criteria and results for the organization advanced search in the Home and Organizations pages. Use match rules with the Search type. The profile option defaults to the seeded match rule HZ_ORG_ADV_SEARCH_RULE.

See Also: *HZ_ORG_ADV_SEARCH_RULE, Oracle Trading Community Architecture Reference Guide*

HZ: Match Rule for Organization Simple Search

Specify the seeded or user-defined match rule for determining the search criteria and results for the organization simple search in the Home and Organizations pages. Use match rules with the Search type. The profile option defaults to the seeded match rule HZ_ORG_SIMPLE_SEARCH_RULE.

See Also: *HZ_ORG_SIMPLE_SEARCH_RULE, Oracle Trading Community Architecture Reference Guide*

HZ: Match Rule for Person Advanced Search

Specify the seeded or user-defined match rule for determining the search criteria and results for the person advanced search in the Home and Person pages. Use match rules with the Search type, but do not use a match rule that has the Organization Name attribute. The profile option defaults to the seeded match rule HZ_PERSON_ADVANCED_SEARCH_MATCH_RULE.

See Also: HZ_PERSON_ADVANCED_SEARCH_MATCH_RULE, *Oracle Trading Community Architecture Reference Guide*

HZ: Match Rule for Person Simple Search

Specify the seeded or user-defined match rule for determining the search criteria and results for the person simple search in the Home and Person pages. Use match rules with the Search type, but do not use a match rule that has the Organization Name attribute. The profile option defaults to the seeded match rule HZ_PERSON_SIMPLE_SEARCH_RULE.

See Also: HZ_PERSON_SIMPLE_SEARCH_RULE, *Oracle Trading Community Architecture Reference Guide*

See Also

Setting Up Searches on page 2-11

Source System Management Profile Option**HZ: Source System Mapping Access**

Specify the type of access for the source systems feature in Oracle Customers Online. You should set the Oracle Customers Online User responsibility to *View Only*, and the Oracle Customers Online Superuser responsibility to *Create and Update*. See Setting Up Source System Management on page 2-13.

Third Party Data Integration Profile Option**HZ: Allow Access to D&B Online Purchase**

Determine access to purchasing D&B information. Set this profile option to *Yes* only if you have a contract with D&B and have completed the integration with D&B. See Setting Up Third Party Data Integration on page 2-14.

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 users 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 system administrators have 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
HZ: Allow Access to D&B Online Purchase	Required	<i>No</i>	Update	Update	Update	Update	Update
HZ: Allow Access to Submit Merge Requests	Required	<i>Yes</i>	Update	Update	Update	Update	Update
HZ: Allow Hierarchy Copy	Required	<i>No</i>	Update	Update	Update	Update	Update
HZ: Enable DQM Party Search	Required	<i>No</i>	Update	No Access	Update	Update	Update
HZ: Enable Duplicate Prevention at Party Creation	Required	<i>Disabled</i>	Update	No Access	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 Organization Advanced Search	Required	<i>HZ_ORG_ADV_SEARCH_RULE</i>	Update	No Access	Update	Update	Update
HZ: Match Rule for Organization Duplicate Prevention	Required	<i>SAMPLE:SEARCH</i>	Update	No Access	Update	Update	Update
HZ: Match Rule for Organization Simple Search	Required	<i>HZ_ORG_SIMPLE_SEARCH_RULE</i>	Update	No Access	Update	Update	Update
HZ: Match Rule for Person Advanced Search	Required	<i>HZ_PERSON_ADVANCED_SEARCH_MATCH_RULE</i>	Update	No Access	Update	Update	Update
HZ: Match Rule for Person Duplicate Prevention	Required	<i>SAMPLE:SEARCH</i>	Update	No Access	Update	Update	Update
HZ: Match Rule for Person Simple Search	Required	<i>HZ_PERSON_SIMPLE_SEARCH_RULE</i>	Update	No Access	Update	Update	Update
HZ: Source System Mapping Access	Required	<i>View Only</i>	Update	Update	Update	Update	Update
IMC: Enable Manage Reports	Required	<i>No</i>	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
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

See Also

Setting Profile Options on page 1-16

Verifying Implementation

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

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.

See Also

Overview on page 1-2

Feature-Specific Implementation

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

Feature-Specific Implementation Overview

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

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

The setup for some of these features involve setting up and administering Data Quality Management (DQM). The DQM setup and functionality, for example the staged schema, is shared across all affected features.

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

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

- **Bookmarked Lists:** See Bookmarked Lists Profile Options on page 1-17.

See Also: *Bookmarked Lists, Oracle Customers Online User Guide*

- **Classifications:** Create and manage the class categories and codes that users can use to classify their customers. See Setting Up Classifications on page 2-5.
- **Data Sharing and Security (DSS):** Assign the TCA Data Security Administrator responsibility to those who need access to administer DSS. See Setting Up Employees as Users on page 1-10. DSS administrators 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 Guide*

- **Duplicate Identification:** See Duplicate Identification Profile Option on page 1-18.

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

- **Duplicate Prevention:** Set up duplicate prevention to warn users if the organization or person that they are creating is a potential duplicate of existing records. See Setting Up Duplicate Prevention on page 2-7.
- **Import:** Assign the Oracle Customers Online Import responsibility to those who need to import data. See Setting Up Employees as Users on page 1-10. Also, set profile options. See Import Profile Options on page 1-19.

See Also: Viewing a List Import, *Oracle Marketing User Guide*

- **Recent Items:** See Recent Items Profile Option on page 1-19.

See Also: Recent Items, *Oracle Customers Online User Guide*

- **Relationships:** Manage the relationship types and roles that users can use to create relationships, including contact relationships. See Setting Up Relationships on page 2-9.
- **Reports:** See Setting Up Periodic Programs on page 1-15 and Reports Profile Option on page 1-19.

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

- **Searches:** Set up the searches in the Home, Organizations, and Person pages with Data Quality Management. See Setting Up Searches on page 2-11.
- **Source System Management (SSM):** Set up for users to map organization, person, and contact records to the source systems that the records originated from. See Setting Up Source System Management on page 2-13.
- **Third Party Data Integration:** Set up for users to purchase information from D&B about customers of type Organization. See Setting Up Third Party Data Integration on page 2-14.
- **XML Web Services:** Set up XML Web Services to enable application-to-application integration between the TCA Registry and legacy or third-party enterprise systems.

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

Responsibility

- **Oracle Customers Online Superuser:** All steps are performed with this responsibility except setting profile options.
- **System Administrator:** Set profile options with this responsibility.

Setting Up Classifications

Oracle Customers Online provides seeded classifications for users to classify customers or other business entities into various categories.

See Also: *Classifications, Oracle Customers Online User Guide*

You can also define custom class categories. 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 customer.

Prerequisites

To create your own system of classification for 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.

Procedure

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

See Also: *Creating a Class Category and Creating a Class Code, Oracle Trading Community Architecture Administration Guide*

2. Set up the Refresh of Classification Denormalization program to perform a data refresh to populate the HZ_CLASS_CODE_DENORM denormalization table. See Setting Up Periodic Programs on page 1-15.

Under the following circumstances, you will need to manually run the Refresh of Classification Denormalization 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 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.

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

See Also

Feature-Specific Implementation Overview on page 2-2

Setting Up Duplicate Prevention

You can set up duplicate prevention for organizations and persons. If the organization or person that the user is creating is a potential duplicate of existing records, then the user is warned and provided with options for resolving the issue.

See Also: Preventing Duplicate Organizations or Persons, *Oracle Customers Online User Guide*

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

Procedure

1. Set up Data Quality Management. Make sure to:
 - Run the DQM Staging program to create the staged schema.
 - Periodically run the DQM Synchronization program to update the staged schema.
 - Compile all match rules that you plan to use.

See Also: Administering Data Quality Management, *Oracle Customers Online User Guide*

Optionally create your own match rules, with the Search type. When defining match rule thresholds, remember that a record's score must meet or exceed the match threshold to be considered a potential duplicate.

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

See Duplicate Prevention Profile Options on page 1-18.

3. Set the HZ: Enable Duplicate Prevention at Party Creation profile option to enable duplicate prevention for organizations, persons, or both. See Duplicate Prevention Profile Options on page 1-18.

See Also

Feature-Specific Implementation Overview on page 2-2

Setting Up Relationships

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

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

See Also: Contact Relationships, Other Relationships, and Hierarchies Overview, *Oracle Customers Online User Guide*

Procedure

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

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

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

- Assign seeded or custom-defined relationship phrases to be used in Oracle Customers Online to an appropriate relationship group. Relationship phrases are not available to the user unless assigned to a relationship group.

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

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

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

See Also: *Contacts Overview, Oracle Customers Online User Guide*

- Relationship phrases assigned to all relationship groups other than Party Contacts are used for Other relationships. These other groups are not seeded with phrases, so you must assign any seeded or custom relationship phrases that you want to use for Other relationships.
- Set the HZ: Allow Hierarchy Copy profile option to allow or prevent copying of relationship hierarchies. See Relationships Profile Option on page 1-19.

See Also: *Copying Hierarchies, Oracle Customers Online User Guide*

See Also

Feature-Specific Implementation Overview on page 2-2

Setting Up Searches

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

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

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

See Also: Home Page *and* Searching for Organizations or Persons, *Oracle Customers Online User Guide*

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

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

Note: You cannot set up DQM for the employee search on the Home page.

Procedure

1. Set up Data Quality Management. Make sure to:
 - Run the DQM Staging program to create the staged schema.
 - Periodically run the DQM Synchronization program to update the staged schema.
 - Compile all match rules that you plan to use.

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

Optionally create your own match rules, with the Search type. The acquisition attributes would be the available search criteria. When defining match rule thresholds, remember that a record's score must meet or exceed the match threshold to be displayed in the search results.

Warning: Do not include the Organization Name attribute in match rules that you create for searching for persons in OCO.

2. Assign search match rules to these profile options, for any of the searches you want to set up with DQM. You can also keep the match rules that are defaults for the profile options.
 - HZ: Match Rule for Organization Advanced Search
 - HZ: Match Rule for Organization Simple Search
 - HZ: Match Rule for Person Advanced Search
 - HZ: Match Rule for Person Simple SearchSee Search Profile Options on page 1-20.
3. Set the HZ: Enable DQM Party Search profile option to *Yes*. Only the searches that you provided a match rule for in the previous step are enabled. See Search Profile Options on page 1-20.

See Also

Feature-Specific Implementation Overview on page 2-2

Setting Up Source System Management

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

See Also: *Source Systems, Oracle Customers Online User Guide*

Procedure

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

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

- Set the HZ: Source System Mapping Access profile option to determine user access for source system mapping. See Source System Management Profile Option on page 1-21.

See Also

Feature-Specific Implementation Overview on page 2-2

Setting Up Third Party Data Integration

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

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

Procedure

1. Integrate Oracle Customers Online with D&B.

See Also: Setting Up Third Party Data Integration, *Oracle Trading Community Architecture Administration Guide*

2. Control how third party and user-entered data are displayed, created, and overwritten. If you set up for the single source of truth (SST) record, OCO would use and display the SST record for organizations.

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

3. Set the HZ: Allow Access to D&B Online Purchase profile option to enable D&B purchasing for users. See Third Party Data Integration Profile Option on page 1-21.

See Also

Feature-Specific Implementation Overview on page 2-2

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