

Oracle® Customer Data Librarian

Implementation Guide

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Oracle Customer Data Librarian Implementation Guide, Release 11i

Part No. B12313-03

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Preface

Intended Audience

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

This guide contains the information needed to implement Oracle Customer Data Librarian. As part of implementing Customer Data Librarian, you must also complete all the implementation steps for Oracle Customers Online.

See Related Documents on page viii for more Oracle Applications product information.

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Structure

1 General Implementation

This chapter describes general implementation of Oracle Customer Data Librarian.

2 Feature-Specific Implementation

This chapter describes implementation of specific features in Oracle Customer Data Librarian.

A Reports and Processes

This section lists the reports and processes that are seeded in Standard Request Submission for these responsibilities: Oracle Customers Online Superuser, Oracle Customers Online Data Librarian Superuser, and Oracle Customers Online Forms Access.

Related Documents

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

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

Online Documentation

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

- **PDF Documentation:** See the Oracle Applications Documentation Library CD for current PDF documentation for your product with each release. The Oracle Applications Documentation Library is also available on *OracleMetaLink* and is updated frequently.
- **Online Help:** Online help patches (HTML) are available on *OracleMetaLink*.
- **About Documents:** Refer to the About Document for the mini-pack or family pack that you have installed to learn about new documentation or documentation patches that you can download. About Documents are available on *OracleMetaLink*.

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 Customer Data Librarian User Guide:** Use this guide to learn how to use Oracle Customer Data Librarian to establish and maintain the quality of the TCA Registry, focusing on consolidation, cleanliness, and completeness. Oracle Customer Data Librarian has all of the features in Oracle Customers Online, and is also part of the Oracle Customer Data Management product family.
- **Oracle Customers Online Implementation Guide:** This guide describes how to implement Oracle Customers Online.

- **Oracle Customers Online User Guide:** This guide describes how to use Oracle Customers Online to view, create, and maintain your customer information. Oracle Customers Online is based on Oracle Trading Community Architecture data model and functionality, and is also part of the Oracle Customer Data Management product family.
- **Oracle Trading Community Architecture Administration Guide:** This guide describes how to administer and implement Oracle Trading Community Architecture. You set up, control, and manage functionality that affect data in the TCA Registry.
- **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 all products in the Oracle Customer Data Management family.
- **Oracle Trading Community Architecture User Guide:** Use this 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 Common Application Components User's Guide:** This document covers how to use various components in Oracle Customer Data Librarian, such as features for notes, tasks, calendars, and employees.
- **Oracle Customer Interaction History Implementation Guide:** This guide provides information on interactions, which you can view from Oracle Customer Data Librarian.
- **Oracle Receivables User Guide:** This guide provides information on accounts, credit summaries, debit items, and credit items, which you can view from Oracle Customer Data Librarian.
- **Oracle Collections User Guide:** This guide provides information on broken promises and delinquencies, which you can view from Oracle Customer Data Librarian.
- **Oracle Install Base User Guide:** This guide provides information on installed base, which you can view from Oracle Customer Data Librarian.
- **Oracle Leads Management Implementation and Administration Guide:** This guide provides information on leads, which you can view from Oracle Customer Data Librarian.
- **Oracle Marketing User Guide:** This guide provides information on campaigns and events, which you can view from Oracle Customer Data Librarian.
- **Oracle Order Management User's Guide:** This guide provides information on orders, which you can view from Oracle Customer Data Librarian.
- **Oracle Quoting User Guide:** This guide provides information on quotes, which you can view from Oracle Customer Data Librarian.
- **Oracle Field Sales User Guide:** This guide provides information on opportunities, which you can view from Oracle Customer Data Librarian.
- **Oracle Sales User Guide:** This guide provides information on opportunities, which you can view from Oracle Customer Data Librarian.

- **Oracle TeleSales User Guide:** This guide provides information on opportunities, which you can view from Oracle Customer Data Librarian.
- **Oracle TeleService User Guide:** This guide provides information on service requests, which you can view from Oracle Customer Data Librarian.
- **Oracle Trading Community Architecture Technical Implementation Guide:** Use this technical implementation guide to learn how to use the public Oracle Trading Community Architecture application programming interfaces (APIs) and develop callouts based on Oracle Workflow Business Events System (BES). For each API, this guide provides a description of the API, the PL/SQL procedure, and the Java method, as well as a table of the parameter descriptions and validations. For each BES callout, this guide provides the name of the logical entity, its description, and the ID parameter name. Also included are setup instructions and sample code.

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 installing 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: A Guide to Using Rapid Install:** 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.
- **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 Documentation Set:** 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 Documentation Set:** 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 Flexfields Guide:** This manual provides flexfields planning, setup, and reference information, as well as information on creating custom reports on flexfields data.

Other Implementation Documentation

- **Oracle Applications Product Update Notes:** Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.
- **Oracle Workflow 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 Workflow API Reference:** This guide describes the APIs provided for developers and administrators to access Oracle Workflow.
- **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 *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 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 and integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on [OracleMetaLink](#).
- **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 tells you how to apply this UI to the design of an application built by using Oracle Forms.

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 an Oracle Applications form 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.

General Implementation

This chapter describes general implementation of Oracle Customer Data Librarian.

This chapter covers the following topics:

- Overview
- Assigning Responsibilities to Users
- Setting Profile Options

Overview

Oracle Customer Data Librarian (CDL) includes all of the functionality of Oracle Customers Online (OCO), with additional features for maintaining the quality of customer data.

Important: You must complete all of the steps for implementing Oracle Customers Online. See: *Oracle Customers Online Implementation Guide*.

In addition, perform the CDL implementation described in this guide.

- Assigning Responsibilities to Users, page 1-1
- Setting Profile Options, page 1-2
- Feature-Specific Implementation Overview, page 2-1

Oracle Customer Data Librarian, along with Oracle Customers Online, 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 CDL implementation, see: *Oracle Trading Community Architecture Reference Guide*.

Assigning Responsibilities to Users

Set up individual users of Oracle Customer Data Librarian. These responsibilities are available for CDL 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.

- **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_NG_ROOT_MENU	Home, Customers, Reports, Data Quality, and Import tabs	Administration tab
Oracle Customers Online Data Librarian Superuser	IMC_NG_ROOT_MENU	Home, Customers, Reports, Data Quality, Import, and Administration tabs	None
TCA Data Security Administrator	HZ Security Main Menu	View, create, update, and delete privileges for Data Sharing and Security administration	None

To Assign Responsibilities to Users:

Responsibility: System Administrator

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

Related Topics

Overview, page 1-1

Setting Profile Options

Set a value for each profile option to specify how Oracle Customer Data Librarian controls access to and processes data.

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

- **IMC:** Oracle Customer Data Librarian or Oracle Customers Online
- **HZ:** Oracle Customer Data Librarian or Oracle Trading Community Architecture
- **Concurrent:** Oracle Application Object Library, specifically related to concurrent programs

To Set Profile Options

Responsibility: System Administrator

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

Important: Some profile options are set with a match rule. Make sure that all seeded or custom match rules you assign to profile options are compiled. See: *Compiling Match Rules, Oracle Trading Community Architecture Administration Guide*.

Related Topics

Profile Option Descriptions, page 1-3

Profile Option Access and Defaults, page 1-8

Overview, page 1-1

Profile Option Descriptions

These profile options are available for you to set up for Oracle Customer Data Librarian:

- De-Duplication Profile Options, page 1-3
- Import Profile Options, page 1-6
- Party Maintenance Profile Options, page 1-7

Related Topics

Setting Profile Options, page 1-2

De-Duplication Profile Options

Important: Some profile options are set with a match rule. Make sure that all seeded or custom match rules you assign to profile options are compiled. See: *Compiling Match Rules, Oracle Trading Community Architecture Administration 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 Customer 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.

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

HZ: Data Sharing and Security Rules for Data Librarians

Select a method for applying Data Sharing and Security (DSS) rules to Customer Data Librarian users. The DSS rules assigned to the users' ID determine their privileges for updating parties. If the user cannot update all parties in a merge request, then the user cannot map or merge the request, depending on how this profile option is set. See: *Data Sharing and Security Overview, Oracle Trading Community Architecture Administration Guide*.

If you select *Apply Rules at Mapping and Show Access Column*, then DSS rules determine privileges to map merge requests, and an Access column appears on the Merge Requests page to indicate the requests that the user has access to map. If you select *Apply Rules at Merge Submission*, then all users can map all requests; however, for a given request, only those with sufficient DSS privileges can submit it for merge.

HZ: Default Profile Attributes for Merge Mapping

Specify the method for defaulting party profile attributes for merge. For each duplicate set with multiple parties, the selected method determines which profile attribute values default as the ones that remain after the merge. For Automerge, the defaulted attributes values automatically remain after merge.

For example, if *Master Party* is selected, the default value for each attribute comes from the master party. Likewise, attribute values are from the party with the latest update date, if that is the selected method.

The method from the HZ: Default Secondary Profile Attributes for Merge Mapping profile option is used instead if you select:

- **Master Party:** But the master party does not have a value for the attribute.
- **Most Frequent Value:** And multiple values fulfill this condition for the attribute.

HZ: Default Secondary Profile Attributes for Merge Mapping

Set this profile option if you select *Master Party* or *Most Frequent Value* for the HZ: Default Profile Attributes for Merge Mapping profile option. The selected secondary method is used if the method from the other profile option does not provide a conclusive default.

If there is still a tie using this secondary method, then a default value is randomly selected among the tied values. For example, you set this profile option to *Party with Earliest Creation Date*. If five parties have the same earliest creation date, then the value comes from any of the five parties.

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, *Oracle Trading Community Architecture Reference Guide*. If you leave this profile option blank, a default match rule is used to generate address mappings.

Note: The selected match rule also determines which addresses are merged together during Automerge. Make sure that the match rule makes sense for both purposes.

The records are automatically merged only if the HZ: Use DQM Suggested Groupings for Automerge profile option is set to *Yes*. If you do not set a match rule, then records are not merged, but transferred from duplicate candidates to the merge master party.

HZ: Match Rule for Address Search

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

You can use the seeded match rule DL ADDRESS AND RELATIONSHIP SEARCH. See: DL ADDRESS AND RELATIONSHIP SEARCH, *Oracle Trading Community Architecture Reference Guide*.

Note: No matter which match rule you select, the available search criteria for addresses remain the same. The match rule is used only for scoring and determining search results.

HZ: Match Rule for Identifying Duplicates with Smart Search

Specify the match rule to use for identifying duplicates by Smart Search. Based on the user-entered search criteria, the match rule determines the potential duplicates from which the user can select to create a merge request.

You can use the seeded match rule DL SMART SEARCH. See: DL SMART SEARCH, *Oracle Trading Community Architecture Reference Guide*. If you use a different match rule, the available search criteria for duplicates are based on the acquisition and scoring attributes of that match rule.

Note: If you select a match rule set, the displayed search criteria are the superset of all attributes in the set.

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, *Oracle Trading Community Architecture Reference Guide*. If you leave this profile option blank, a default match rule is used to generate relationship mappings.

Note: The selected match rule also determines which relationships are merged together during Automerge. Make sure that the match rule makes sense for both purposes.

The records are automatically merged only if the HZ: Use DQM Suggested Groupings for Automerge profile option is set to *Yes*. If you do not set a match rule, then records are not merged, but transferred from duplicate candidates to the merge master party.

HZ: Match Rule for Relationship Search

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

You can use the seeded match rule DL ADDRESS AND RELATIONSHIP SEARCH. See: DL ADDRESS AND RELATIONSHIP SEARCH, *Oracle Trading Community Architecture Reference Guide*.

Important: No matter which match rule you select, the available search criteria for relationships remain the same. The match rule is used only for scoring and determining search results.

HZ: Merge Master Party Defaulting

Specify the method to use to select a party as the default merge master for new merge requests that contain multiple parties. For Automerge, the default master is automatically the party that remains after merge.

If multiple parties fulfill the condition for these methods:

- Party with Highest Certification
- Party with Most Accounts
- Party with Most Addresses
- Party with Most Relationships

then the party with the latest update date is selected. For example, the profile option is set to Party with Highest Certification. If five parties in the merge request have the highest certification, then the party among the five with the latest update date is the master.

The certification validation is based on the highest seeded certification level. If you want to change the highest seeded level, then update the lookup meaning of the level and update or create lower levels. See: *Administering Certification, Oracle Trading Community Architecture Administration Guide*.

If you select the User Hook method to use a custom defaulting process, then you must have the user hook defined. See: *Creating Custom Merge Master Party Defaulting Method, Oracle Trading Community Architecture Administration 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: Protect Party Modeling Before Merge

Specify if users are warned if the merge request they are creating contains more than one party in the same relationship hierarchy. The warning states that merging such parties might affect party modeling decisions, and allows the user to edit the merge request or continue to create it.

HZ: Show Address Mapping Suggestions

Enter *Yes* or *No* to determine whether address mapping suggestions are displayed by default or not. The match rule that is set for the HZ: Match Rule for Address Mapping Suggestions profile option determines the mapping suggestions.

HZ: Show Relationship Mapping Suggestions

Enter *Yes* or *No* to determine whether relationship mapping suggestions are displayed by default or not. The match rule that is set for the HZ: Match Rule for Relationship Mapping Suggestions profile option determines the mapping suggestions.

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.

Related Topics

Duplicate Identification Profile Options, *Oracle Customers Online Implementation Guide*

Setting Up De-Duplication, page 2-2

De-Duplication Overview, *Oracle Customer Data Librarian User Guide*

Profile Option Descriptions, page 1-3

Import Profile Options

Important: Some profile options are set with a match rule. Make sure that all seeded or custom match rules you assign to profile options are

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

HZ: Import Batch De-Duplication Match Rule

Specify the default match rule to use for batch de-duplication. This profile option determines the match rule default in the Define Import: Batch De-duplication page, the first step of defining an import.

HZ: Import Registry De-Duplication Match Rule

Specify the default match rule to use for Registry de-duplication. This profile option determines the match rule default in the Define Import: Import to Registry page, the last step of defining an import.

IMC: Import Preview Processing Results

Specify the default setting for the import option of previewing results before the actual import. This option appears in the Define Import: Import to Registry page, the last step of defining an import. Leaving this profile option blank is the same as setting it to *No*.

IMC: Import Run Address Validation

Specify the default setting for the option of running address validation as a preimport process. This option appears in the Define Import: Address Validation page, the second step of defining an import. Leaving this profile option blank is the same as setting it to *No*.

IMC: Import Run Batch De-Duplication

Specify the default setting for the option of running batch de-duplication as a preimport process. This option appears in the Define Import: Batch De-Duplication page, the first step of defining an import. Leaving this profile option blank is the same as setting it to *No*.

IMC: Import Run Registry Match

Specify the default setting for the option of running Registry de-duplication as a preimport process. This option appears in the Define Import: Import to Registry page, the last step of defining an import. Leaving this profile option blank is the same as setting it to *No*.

Related Topics

Import Profile Options, *Oracle Customers Online Implementation Guide*

Setting Up Import, page 2-4

Import Overview, *Oracle Customer Data Librarian User Guide*

Profile Option Descriptions, page 1-3

Party Maintenance Profile Options

Important: Some profile options are set with a match rule. Make sure that all seeded or custom match rules you assign to profile options are compiled. See: *Compiling Match Rules, Oracle Trading Community Architecture Administration 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. Use match rules with the Search purpose. The profile option defaults to the seeded match rule HZ_ORG_SIMPLE_SEARCH_RULE. See: HZ_ORG_SIMPLE_SEARCH_RULE, *Oracle Trading Community Architecture Reference Guide*.

If you use a different match rule, the available search criteria are based on the acquisition and scoring attributes of that match rule.

Important: This match rule also applies to the organization simple search on the Home and Organizations pages. Select a match rule that works for both purposes. See: Search Profile Options, *Oracle Customers Online Implementation Guide*.

If you select a match rule set, the displayed search criteria are the superset of all attributes in the set.

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. Use match rules with the Search purpose, 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: HZ_PERSON_SIMPLE_SEARCH_RULE, *Oracle Trading Community Architecture Reference Guide*.

If you use a different match rule, the available search criteria are based on the acquisition and scoring attributes of that match rule.

Important: This match rule also applies to the person simple search on the Home and Organizations pages. Select a match rule that works for both purposes. See: Search Profile Options, *Oracle Customers Online Implementation Guide*.

If you select a match rule set, the displayed search criteria are the superset of all attributes in the set.

Related Topics

Setting Up Party Maintenance, page 2-4

Maintaining Parties, *Oracle Customer Data Librarian User Guide*

Profile Option Descriptions, page 1-3

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.

Note: If you cannot find specific profile options with the HZ prefix in this table, then see: Profile Option Access and Defaults, *Oracle Trading Community Architecture Administration Guide*.

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: Data Sharing and Security Rules for Data Librarians	Required	<i>Apply Rules at Mapping and Do Not Show Access Column</i>	Update	Update	Update	Update	Update
HZ: Import Batch De-Duplication Match Rule	Optional	No Default	Update	Update	Update	Update	Update
HZ: Import Registry De-Duplication Match Rule	Optional	No Default	Update	Update	Update	Update	Update
HZ: Match Rule for Address Search	Required	<i>DL ADDRESS AND RELATIONSHIP SEARCH</i>	Update	Update	Update	Update	Update
HZ: Match Rule for Identifying Duplicates with Smart Search	Required	<i>DL SMART SEARCH</i>	Update	Update	Update	Update	Update
HZ: Match Rule for Relationship Search	Required	<i>DL ADDRESS AND RELATIONSHIP SEARCH</i>	Update	Update	Update	Update	Update
HZ: Show Address Mapping Suggestions	Optional	<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
HZ: Show Relationship Mapping Suggestions	Optional	No	Update	Update	Update	Update	Update
IMC: Display Notes for Merge Request Mapping	Optional	Yes	No Access	No Access	No Access	No Access	Update
IMC: Import Preview Processing Results	Optional	No Default	Update	Update	Update	Update	Update
IMC: Import Run Address Validation	Optional	No Default	Update	Update	Update	Update	Update
IMC: Import Run Batch De-Duplication	Optional	No Default	Update	Update	Update	Update	Update
IMC: Import Run Registry Match	Optional	No Default	Update	Update	Update	Update	Update

Related Topics

Setting Profile Options, page 1-2

Feature-Specific Implementation

This chapter describes implementation of specific features in Oracle Customer Data Librarian.

This chapter covers the following topics:

- Feature-Specific Implementation Overview
- Setting Up De-Duplication
- Setting Up Import
- Setting Up Party Maintenance

Feature-Specific Implementation Overview

Oracle Customer 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 identifying and resolving duplicates. See: Setting Up De-Duplication, page 2-2.
- **Import:** Set up for importing data from legacy, third party, and other external sources. See: Setting Up Import, page 2-4.
- **Party Maintenance:** Set up for maintaining parties, including assigning certification levels and setting party status. See: Setting Up Party Maintenance, page 2-4.
- Oracle Trading Community Architecture (TCA) features that are used or integrated into Oracle Customer Data Librarian, including:
 - **Data Sharing and Security (DSS):** Control the access privileges of users to create, update, or delete customer data.
 - **Third Party Data Integration:** Integrate Oracle Customer Data Librarian with D&B so that users can access D&B information to enrich customer information.
 - **Source System Management:** Set up for mappings between external source systems and customer data. You can control how source system and user-entered data are displayed, created, and overwritten.

See: 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.

Important: For features and functionality that are also in Oracle Customers Online, complete those setup steps as well. See: *Feature-Specific Implementation Overview, Oracle Customers Online Implementation Guide.*

Related Topics

Overview, page 1-1

Setting Up De-Duplication

Oracle Customer Data Librarian allows users to find and resolve duplicates. De-duplication uses Data Quality Management (DQM) for:

- Identifying duplicates using Smart Search.
- Identifying duplicates using System Duplicate Identification (SDI) batches.
- Automatically merging parties identified as definite duplicates as part of creating SDI 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.

Much of de-duplication implementation involves setting up DQM for the above purposes.

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

To Set Up De-Duplication:

1. Set up Data Quality Management. See: *Administering Data Quality Management, Oracle Trading Community Architecture Administration Guide.* 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.

Optionally create match rules for any of the purposes mentioned above for using DQM. Seeded match rules, however, are available. See: *Feature-Specific Match Rules, Oracle Trading Community Architecture Reference Guide.*

- To create match rules to be used for Automerger in System Duplicate Identification batch creation, you must define the match rules as allowed for Automerger.
- 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 and scoring attributes. If you define a match rule set, the superset of all attributes in the set would be the search criteria.
- For searching for addresses and relationships to map, 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.

2. Optionally use the DUP_BATCH_RESTRICTION_LIST Receivables lookup to define the list of attributes that appear in the System Duplicate Identification Batches page. These attributes are used as restriction criteria for creating SDI batches. You can add any attribute from the HZ_PARTIES table to the list. See: Defining Receivables Lookups, *Oracle Receivables User Guide*.
3. For address validation information to be displayed when users map duplicate addresses, set up and run address validation at a frequency that fits your needs. See: Setting Up Address Validation, *Oracle Trading Community Architecture Administration Guide* and Address Validation, *Oracle Trading Community Architecture User Guide*.

Important: Personalize the Merge Duplicate Addresses page to display the Validation Level column, which is hidden by default.

4. Define profile options:
 - Concurrent: Report Access Level
 - HZ: Data Sharing and Security Rules for Data Librarians
 - HZ: Default Profile Attributes for Merge Mapping
 - HZ: Default Secondary Profile Attributes for Merge Mapping
 - HZ: Match Rule for Address Mapping Suggestions
 - HZ: Match Rule for Address Search
 - HZ: Match Rule for Identifying Duplicates with Smart Search
 - HZ: Match Rule for Relationship Mapping Suggestions
 - HZ: Match Rule for Relationship Search
 - HZ: Merge Master Party Defaulting
 - HZ: Number of Workers for DQM Duplicate Identification Program
 - HZ: Protect Party Modeling Before Merge
 - HZ: Show Address Mapping Suggestions
 - HZ: Show Relationship Mapping Suggestions
 - IMC: Display Notes for Merge Request Mapping

See: De-Duplication Profile Options, page 1-3.

5. If you have source system data in the TCA Registry and are using Single Source of Truth rules, make sure that source system data can be overwritten in the de-duplication process. Users might not be able to complete certain merges if they do not have full overwrite privileges. See: Single Source of Truth Overview, *Oracle Trading Community Architecture Administration Guide*.
 1. Create a user overwrite rule that allows update of all attributes. See: Setting Up User Overwrite Rules, *Oracle Trading Community Architecture Administration Guide*.

2. 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: *Source System Management Profile Options, Oracle Trading Community Architecture Administration Guide*.

Related Topics

Setting Up Duplicate Identification, *Oracle Customers Online Implementation Guide*

De-Duplication Overview, *Oracle Customer Data Librarian User Guide*

Feature-Specific Implementation Overview, page 2-1

Setting Up Import

In Oracle Customer Data Librarian, users can import data from external sources by:

1. Loading source files of data into the import interface tables.
2. Transferring batches of data from the interface tables into the TCA Registry.

You set up for users to manually perform both parts of the import process. You can also optionally set up the second part to automatically run after the user successfully completes the first part.

To Set Up Import:

1. Set up as you would for TCA Bulk Import. See: *Setting Up Bulk Import, Oracle Trading Community Architecture Administration Guide*.
2. Set these profile options:
 - HZ: Import Batch De-Duplication Match Rule
 - HZ: Import Registry De-Duplication Match Rule
 - IMC: Import Preview Processing Results
 - IMC: Import Run Address Validation
 - IMC: Import Run Batch De-Duplication
 - IMC: Import Run Registry Match

See: *Import Profile Options, page 1-6*.

Tip: To optionally set up automatic import into the Registry after file load, you must set additional profile options. See: *Setting Up Import, Oracle Customers Online Implementation Guide*.

Related Topics

Import Overview, *Oracle Customer Data Librarian User Guide*

Setting Up Party Maintenance

Oracle Customer Data Librarian allows users to maintain parties, including assigning certification levels and setting party status. You can:

- Set up Data Quality Management for the search of organizations and person to maintain.
- Manage the available certification levels and reasons.

To Set Up Party Maintenance:

1. Set up Data Quality Management. See: *Administering Data Quality Management, Oracle Trading Community Architecture Administration Guide*. 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.

Optionally create match rules with the Search purpose for the organization or person search. The search criteria shown in the user interface will change based on the acquisition and scoring attributes in the match rule. If you define a match rule set, the superset of all attributes in the set would be the search criteria.

Seeded match rules are also available. See: *Seeded Match Rules, Oracle Trading Community Architecture Reference Guide*.

2. Assign the match rule you want to use for search to the appropriate profile option:
 - **Organizations:** HZ: Match Rule for Organization Simple Search
 - **Persons:** HZ: Match Rule for Person Simple Search

See: *Party Maintenance Profile Options*, page 1-7.

3. Optionally add or update certification levels or reasons, to be made available for certification assignment. See: *Administering Certification, Oracle Trading Community Architecture Administration Guide*.

Related Topics

Maintaining Parties, *Oracle Customer Data Librarian User Guide*

Feature Specific Implementation Overview, page 2-1

Reports and Processes

This section lists the reports and processes that are seeded in Standard Request Submission for these responsibilities: Oracle Customers Online Superuser, Oracle Customers Online Data Librarian Superuser, and Oracle Customers Online Forms Access.

Some reports and programs can be submitted in multiple ways, but these descriptions are for running them from Standard Request Submission.

Reports

DNB Global Data Products Request Report

Provides details about the D&B information purchased within a specified date range. See: DNB Global Data Products Request Report, *Oracle Trading Community Architecture User Guide*.

Processes

Copy Relationship Type and All Relationships

Copies relationship types and, optionally, corresponding relationships. See: Copying Relationship Types, *Oracle Trading Community Architecture Administration Guide*.

Copy Organization Extensions Data for Profile Versioning

Copies organization profile extensions data and creates new extensions records for new organization profile versions. See: Copying Extensions Data for Profile Versioning, *Oracle Trading Community Architecture Administration Guide*.

Copy Person Extensions Data for Profile Versioning

Copies person profile extensions data and creates new extensions records for new person profile versions. See: Copying Extensions Data for Profile Versioning, *Oracle Trading Community Architecture Administration Guide*.

DQM Compile All Rules

Compiles all DQM match rules. See: DQM Compile All Rules Program, *Oracle Trading Community Architecture Administration Guide*.

DQM Index Optimization Program

Optimizes *interMedia* indexes in the DQM staged schema. See: DQM Index Optimization Program, *Oracle Trading Community Architecture Administration Guide*.

DQM Staging Program

Creates or updates the DQM staged schema. See: DQM Staging Program, *Oracle Trading Community Architecture Administration Guide*.

DQM Synchronization Program

Synchronizes the DQM staged schema with the TCA Registry. See: DQM Synchronization Program, *Oracle Trading Community Architecture Administration Guide*.

Flatten Employee Hierarchy

Affects the employees feature in the Home tab. See: Resource Manager Concurrent Programs, *Oracle Common Application Components Implementation Guide*.

Flatten group hierarchy

Affects the employees feature in the Home tab. See: Resource Manager Concurrent Programs, *Oracle Common Application Components Implementation Guide*.

Generate key for fuzzy match

Generates keys for fuzzy search.

Generate Request List for DNB Batch Load

Generates a list of parties that you want to purchase and batch load D&B information for. See: Generate Request List for D&B Batch Load, *Oracle Trading Community Architecture User Guide*.

Generate Time Zone for Locations

Creates or updates time zone information for locations. See: Generate Time Zone for Locations, *Oracle Trading Community Architecture User Guide*.

Generate Time Zone for Phone Numbers

Creates or updates time zone information for phone numbers. See: Generate Time Zone for Phone Numbers, *Oracle Trading Community Architecture User Guide*.

IMC: Refresh Summary Information for Quality Reports

Refreshes the information available for customer quality reports. See: Setting Up Periodic Programs, *Oracle Customers Online Implementation Guide*.

IMC: Refresh Summary Information for Reports

Refreshes the information available for customer profile reports. See: Setting Up Periodic Programs, *Oracle Customers Online Implementation Guide*.

Load D&B Data (8i Implementation)

Loads D&B information that was purchased online and corrected due to errors. See: Load D&B Data, *Oracle Trading Community Architecture User Guide*.

Rebuilding Intermedia Index for Task Names

Affects tasks in the Home and Customers tabs. See: Task and Calendar Concurrent Program, *Oracle Common Application Components Implementation Guide*.

Refresh of Classification Denormalization

Populates and refreshes the HZ_CLASS_CODE_DENORM denormalization table. See: Refresh of Classification Denormalization, *Oracle Trading Community Architecture Administration Guide*.

Source System – Migrate Party Level Source System References

Migrates source system information. See: Source System – Migrate Party Level Source System References, *Oracle Trading Community Architecture Administration Guide*.

Synchronize Employees

Affects the employees feature in the Home tab. See: Resource Manager Concurrent Programs, *Oracle Common Application Components Implementation Guide*.

Synchronize JTF_NOTES_TL_C1 index

Affects notes in the Home and Customers tabs.

Third Party Data Integration Update

Regenerates the Single Source of Truth record. See: Third Party Data Integration Update Program, *Oracle Trading Community Architecture Administration Guide*.

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