

**Oracle® Trading Community Architecture**

Administration Guide

Release 11*i*

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**Oracle Trading Community Architecture Administration Guide, Release 11i**

**Part No. B10854-04**

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# Preface

## Intended Audience

Welcome to Release 11*i* of the *Oracle Trading Community Architecture Administration Guide*.

This guide contains the information needed to administer and implement Oracle Trading Community Architecture. You set up, control, and manage functionality that affect data in the TCA Registry.

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

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# Structure

## **1 Overview**

This chapter provides an overview of administering Oracle Trading Community Architecture.

## **2 Implementation**

This chapter describes how to implement Oracle Trading Community Architecture.

## **3 Relationships**

This chapter describes setting up for relationships, including creating, copying, and converting relationship types, adding new relationship phrase and role pairs to existing types, and assigning phrase and role pairs to relationship groups.

## **4 Classifications**

This chapter describes administering classifications, including creating and updating class categories and codes.

## **5 Data Quality Management**

This chapter describes administering Data Quality Management, including setting up word replacements, defining attributes and transformations, defining match rules, maintaining the staged schema, and maintaining the Merge Dictionary.

## **6 Data Sharing and Security**

This chapter describes administering Data Sharing and Security, including creating, updating, and viewing data sharing groups as well as assigning access privileges.

## **7 Adapters**

This chapter describes administering adapters, including defining, updating, and viewing adapter configurations.

## **8 Phones**

This chapter describes administering phone numbers, including time zone information and phone formats.

## **9 Extensions**

This chapter describes administering extensions, setting up custom attributes to extend the TCA Registry.

## **10 Source System Management**

This chapter describes administering Source System Management, including source systems, Single Source of Truth, and data security for Other entities.

## **11 Certification**

This chapter describes administering certification, including managing certification levels and reasons.

## **A Reports and Processes**

This section lists the reports and processes, including relevant request sets, that are seeded in Standard Request Submission for the Trading Community Manager responsibility.

## **B Profile Options**

This appendix describes the profile options that affect the operation of Oracle Trading Community Architecture.

## **C Standard Navigation Paths**

This appendix describes standard navigation paths for administering Oracle Trading Community Architecture.

## 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 Trading Community Architecture.

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 Oracle Applications Documentation Library CD for current PDF documentation for your product with each release. The Oracle Applications Documentation Library is also available on Oracle*MetaLink* and is updated frequently.
- **Online Help:** Online help patches (HTML) are available on Oracle*MetaLink*.
- **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 Oracle*MetaLink*.

### 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 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 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 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.

- **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 Customers Online Implementation Guide:** This guide describes how to implement Oracle Customers Online.
- **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 Customer Data Librarian Implementation Guide:** This guide describes how 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.
- **Oracle Receivables User Guide:** This user guide describes how to enter and maintain party and customer account information, define and use customer profiles, run reports for customer information, merge customer accounts or sites within an account, and import party and customer accounts.

## 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.

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# Overview

This chapter provides an overview of administering Oracle Trading Community Architecture.

This chapter covers the following topics:

- Introduction to Administration

## Introduction to Administration

Oracle Trading Community Architecture (TCA) administration features let you set up, control, and manage functionality that affect data in the TCA Registry. You can administer these TCA tools and features to best fit your business needs. See: Introduction to Oracle Trading Community Architecture, *Oracle Trading Community Architecture User Guide*.

Most of the administration features are available in the Administration tab, a one-stop access for TCA administration, in the Trading Community Manager responsibility. This tab is also available in Oracle Customers Online and Oracle Customer Data Librarian.

TCA administration includes:

- **Relationships:** Manage the relationship types that can be used to create relationships among entities in the TCA Registry. See: Administering Relationships, page 3- 1 .
- **Classifications:** Manage the class categories and codes that can be used to classify entities in the TCA Registry. See: Administering Classifications, page 4- 3 .
- **Data Quality Management:** Set up Data Quality Management, which provides powerful search and duplicate identification functionality. See: Administering Data Quality Management, page 5- 9 .
- **Security:** Manage data sharing groups and control how specific entities in the TCA Registry can be accessed depending on user and responsibility privileges. See: Administering Data Sharing and Security, page 6- 2 .
- **Adapters:** Configure third party or custom-made adapters that are used to process data in the TCA Registry. See: Administering Adapters, page 7- 2 .
- **Phones:** Specify time zone information for phones, and define phone formats. See: Administering Phones, page 8- 1 .
- **Extensions:** Extend the TCA Registry by creating user-defined attributes. See: Administering Extensions, page 9- 1 .
- **Source System Management:** Define the source systems, such as legacy or third party systems, that provide data for specific TCA entities, and control how data

from various sources is used and displayed. See: *Administering Source System Management*, page 10- 2 .

- **Certification:** Define certification levels and reasons, and manage the display of levels. See: *Administering Certification*, page 11- 1 .

Many of the administration steps are also performed as part of implementing TCA. See: *General Implementation*, page 2- 1 and *Feature-Specific Implementation*, page 2- 4 .

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# Implementation

This chapter describes how to implement Oracle Trading Community Architecture.

This chapter covers the following topics:

- General Implementation
- Feature-Specific Implementation

## General Implementation

These general implementation steps apply to setting up TCA for using the Trading Community Manager responsibility:

- Assign responsibilities to users, page 2- 1 .
- Index customer account data, page 2- 2 .
- Run migration and upgrade requests as needed, page 2- 2 .
- Optionally define access to the Administration tab, page 2- 4 .
- Set general profile options, page B- 3 .

You can also perform any of the administration steps as part of implementation, for example setting up Data Quality Management. See: Introduction to Administration, page 1- 1 . To implement specific features in the Trading Community Manager responsibility, see: Feature-Specific Implementation, page 2- 4 .

## Assigning Responsibilities to Users

Set up individual users of Oracle Trading Community Architecture. Two responsibilities are available for TCA users:

- **Trading Community Manager:** Access to all TCA features, with view-only privileges for Data Sharing and Security (DSS) administration.
- **TCA Data Security Administrator:** Administration privileges for Data Sharing and Security. Assign this responsibility along with Trading Community Manager to users who need to administer DSS.

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

Responsibility	Menu	Access	Menu Exclusion
Trading Community Manager	TCA Main Menu	Trading Community, Content Access and Integration, Data Quality Management, Setup, Control	None
TCA Data Security Administrator	HZ Security Main Menu	View, create, update, and delete privileges for Data Sharing and Security administration	None

## Procedure

**Responsibility:** System Administrator

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

## Related Topics

General Implementation, page 2- 1

## Customer Text Data Creation and Indexing

Use the Customer text data creation and indexing program to index customer account information, including account sites, contacts, and contact points. The program creates and updates an *interMedia* index on the HZ\_CUST\_ACCT\_SITES\_ALL table.

You create the index when you run this program for the first time. Schedule the program to periodically run, to ensure that the customer account data is up to date for searches on the index. Base the frequency on your business needs, for example, how often customer data is updated or searched.

## Program Parameter

**Important:** Use this parameter only for the first time that you run this program.

- **Build Compact Index:** Specify if you want to build a compact index that does not include contact information for customer accounts and customer account sites.

## Related Topics

General Implementation, page 2- 1

## Running Migration and Upgrade Requests

Run any of the following programs or reports as needed as part of your implementation or upgrade.

### Account to Party Relationships Migration Program

After upgrading to Release 11*i*, run this program once to migrate customer account relationships to party relationships, from the RA\_CUSTOMER\_RELATIONSHIPS\_ALL

table to the HZ\_RELATIONSHIPS and HZ\_PARTIES tables. See: Relationships Overview, *Oracle Trading Community Architecture User Guide*.

### **HZ Upgrade Script Report**

After upgrading to Release 11*i*, use this report to view details about Oracle Trading Community Architecture upgrade scripts that were run, including:

- Script name
- Base table names
- Number of rows to be processed
- Actual number of rows processed

### **Person Names Migration Program**

After upgrading to Release 11*i*, run this program once to migrate the FIRST\_NAME and LAST\_NAME column values from the RA\_CUSTOMERS table to the PERSON\_FIRST\_NAME and PERSON\_LAST\_NAME columns of the HZ\_PARTIES and HZ\_PERSON\_PROFILES tables.

### **Source System - Migrate Party Level Source System References**

Run this program once, when you first implement or upgrade to the 11*i*.HZ.K mini-pack or above. Run this program only if you used the ORIG\_SYSTEM\_REFERENCE column before upgrade and want to use source systems after upgrade. See: Source Systems Overview, page 10- 2 . In the program parameter, specify the batch size, or number of records to process for each commit.

The Source System - Migrate Party Level Source System References program migrates nonunique source IDs, or references, from these party level tables to the HZ\_ORIG\_SYS\_REFERENCES table:

- HZ\_CONTACT\_POINTS
- HZ\_LOCATIONS
- HZ\_ORG\_CONTACT\_ROLES
- HZ\_ORG\_CONTACTS
- HZ\_PARTIES
- HZ\_PARTY\_SITES

Along with the migrated source IDs, the program assigns a corresponding *UNKNOWN* source system because the source system is usually not captured for all existing data. In addition, existing source IDs in party level tables are not unique, so multiple party level records can use the same source ID. The *UNKNOWN* source system allows the same source ID to point to multiple records for all party level tables that are enabled for Source System Management.

### **Related Topics**

General Implementation, page 2- 1

## Defining Administration Access

You can access the Administration tab as a whole, with all available functions, from the Trading Community Manager responsibility and from other Oracle applications. For example, you get the tab in Oracle Customers Online if you have the Oracle Customers Online Superuser responsibility, and in Oracle Customer Data Librarian with the Oracle Customers Online Data Librarian Superuser responsibility.

To restrict and manage access to the Administration tab, you can assign specific Administration functions to other responsibilities. For example, you can create a Relationships Administrator responsibility with access to administer only relationships.

### Procedure

**Responsibility:** System Administrator

See: Implementing Function Security, *Oracle Applications System Administrator's Guide*.

### Related Topics

General Implementation, page 2- 1

Introduction to Administration, page 1- 1

## Feature-Specific Implementation

For features in the Trading Community Manager responsibility, you can set up:

- Address validation, page 2- 4
- Batch duplicate identification, page 2- 5
- Bulk Import, page 2- 6
- eLocations Spatial Data Integration, page 2-10
- Party Merge, page 2-11
- Relationship Manager, page 2-11
- Third Party Data Integration, page 2-12

You can also perform any of the administration steps as part of implementation, for example setting up Data Quality Management. See: Introduction to Administration, page 1- 1 . For general implementation steps, see: General Implementation, page 2- 1 .

## Setting Up Address Validation

Address validation is the process of comparing raw or user-entered addresses against a known or authorized data source, to determine if the addresses are recognized and correct according to the authority's database.

TCA address validation uses a central XML open-standards based "black box" that allows integration with third party service providers and custom solutions, through adapters that you or the third party provides.

Callers such as the Address Validation program or the TCA Bulk Import process invoke the black box, which sends and receives the address data to and from the address validation adapters. The adapters validate TCA addresses against the standard addresses in the adapter's associated databases.

## Procedure

1. If you are using third party address validation services, install and configure their software and adapters according to their instructions.

You can optionally develop your own address validation adapters. See: *Creating Address Validation Adapters*, page 7- 4 .

2. Administer third party or custom adapters by defining address validation adapter configurations. See: *Administering Adapters*, page 7- 2 and *Configuring Adapters*, page 7- 2 .

3. Set these profile options:

- HZ: Allow Update to Standardized Address
- HZ: Create Log for Adapters
- HZ: Default Location Service Adapter
- HZ: Maintain Location History
- HZ: Timeout Limit for Address Validation

See: *Setting Profile Options*, page B- 1 .

- ECX: Log File Path

See: *Define System Profile Options, Oracle XML Gateway User's Guide*.

## Related Topics

*Address Validation, Oracle Trading Community Architecture User Guide*

*Adapters Overview*, page 7- 1

*Feature-Specific Implementation*, page 2- 4

## Setting Up Batch Duplicate Identification

Batch duplicate identification involves creating batches of potential duplicate parties in the TCA Registry, using Data Quality Management tools. Based on a specified match rule, the process determines duplicate candidates, which can be designated for merge.

## Procedure

1. Set up Data Quality Management, page 5- 9 .

Optionally create match rules with the Expanded Duplicate Identification or Bulk Duplicate Identification purpose, page 5-25. You can allow Automerge for the match rule and enter an automatic merge threshold. Any party with a score that exceeds the automatic merge threshold is defaulted in the Duplicate Identification: Batch Review window to be merged. The Automerge program itself does not run.

2. Optionally set the DQM Match Rule for Batch Duplicate Identification profile option if you want to default a match rule in the Submit Duplicate Identification Batch window. See: *Setting Profile Options*, page B- 1 .
3. Optionally use the DUP\_BATCH\_RESTRICTION\_LIST Receivables lookup to define the list of attributes that appear in the Submit Duplicate Identification Batch window. You can add any attribute from the HZ\_PARTIES table to the list. These attributes are used as restriction criteria for creating duplicate identification batches.

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

## Related Topics

Batch Duplicate Identification Overview, *Oracle Trading Community Architecture User Guide*

Feature-Specific Implementation, page 2- 4

Data Quality Management Overview, page 5- 1

## Setting Up Bulk Import

TCA Bulk Import allows for importing batches of data from external sources into the TCA Registry.

### Procedure

- Define and map legacy and other source systems to entities in the TCA Registry. Perform this step for all source systems you plan to import from. See: Administering Source Systems, page 10- 4 .
- You can provide the option of resolving duplicates for import:
  - **Batch de-duplication:** Resolving duplicates within the interface tables.
  - **Registry de-duplication:** Resolving duplicates between the interface tables and the TCA Registry.

Import de-duplication involves Data Quality Management (DQM) bulk duplicate identification. See: Bulk Import De-Duplication Processes, page 2- 7 .

1. Administer Data Quality Management, page 5- 9 .

You must define and designate attributes and transformations for bulk duplicate identification acquisition.

2. Optionally create match rules for import de-duplication, which must have the Bulk Duplicate Identification purpose.

For match rules you create for Registry de-duplication, allow for Automerge if you want to automatically merge parties with the highest probability of being duplicates.

When you create the match rules, take note of the match and automatic merge thresholds. If a record:

- Does not exceed the match threshold, then it is not a duplicate. In Registry de-duplication, the record is inserted as a new party into the TCA Registry.
- Reaches or exceeds the match threshold but not the automatic merge threshold, then it is a potential duplicate.

In batch de-duplication, based on the action that the user specifies for duplicates, the record is dealt with in the interface tables, before import.

In Registry de-duplication, the record is inserted as a new party, but is also included in a System Duplicate Identification batch in Oracle Customer Data Librarian for further evaluation. See: System Duplicate Identification, *Oracle Customer Data Librarian User Guide*.

- Reaches or exceeds the automatic merge threshold, then it is inserted as a new party and then automatically merged with its duplicates. This threshold applies only to Registry de-duplication, and only if the match rule is allowed for Automerge.
  - For providing the option of validating addresses before importing them into the TCA Registry, use or create adapters that can provide address validation services, and define the adapter configurations. See: *Configuring Adapters*, page 7- 2 .
  - For providing the option of applying Data Sharing and Security to the import process:
    1. *Administer Data Sharing and Security*, page 6- 2 .
    2. Set the HZ: Use Data Sharing and Security During Import profile option.
  - Set these profile options:
    - HZ: Allow Import of Records with Disabled Lookups
    - HZ: Allow Updates of Address Records During Import
    - HZ: Character Value to Indicate NULL During Import
    - HZ: Date Value to Indicate NULL During Import
    - HZ: Error Limit for Import
    - HZ: Import Batch De-Duplication Match Rule
    - HZ: Import Registry De-Duplication Match Rule
    - HZ: Number of Workers for Import
    - HZ: Numeric Value to Indicate NULL During Import
    - HZ: Use HR Security During Import
    - HZ: Validate Flexfields During Import
    - HZ: Work Unit Size for Import
- See: *Setting Profile Options*, page B- 1 .

## Related Topics

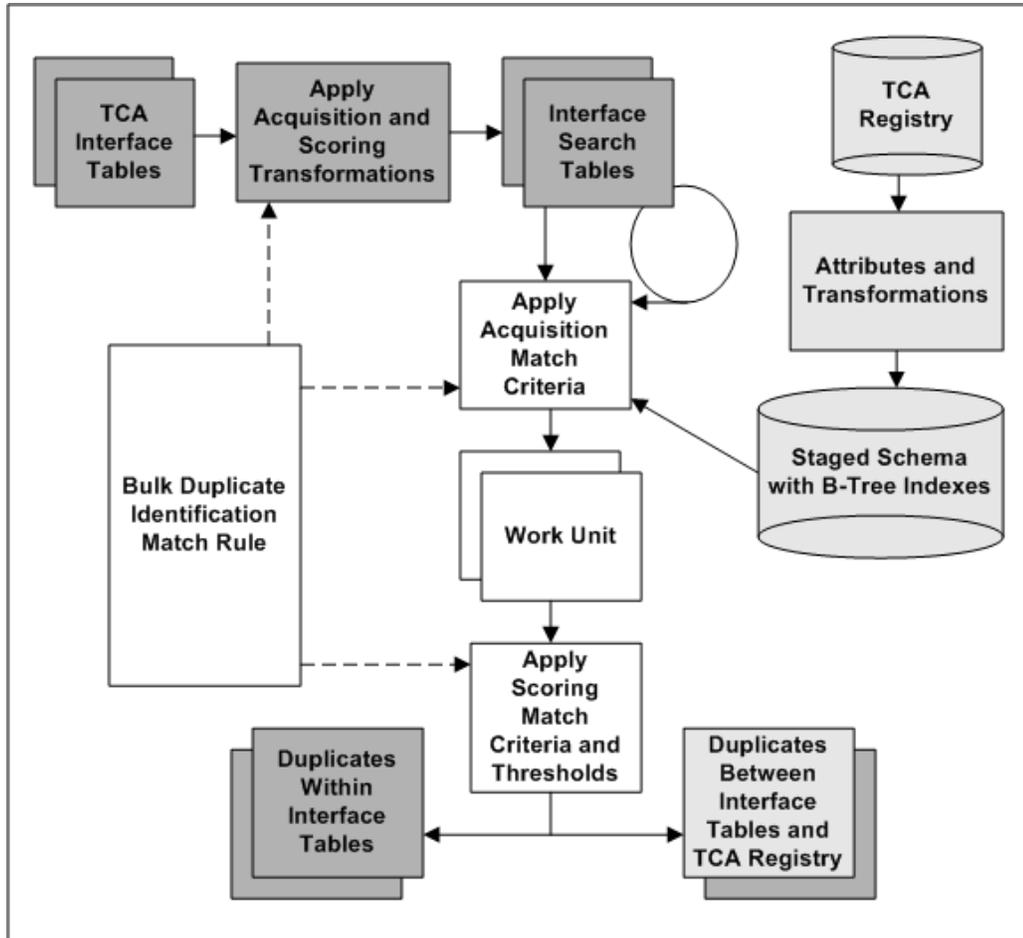
Bulk Import Overview, *Oracle Trading Community Architecture User Guide*

Feature-Specific Implementation, page 2- 4

Data Quality Management Overview, page 5- 1

## Bulk Import De-Duplication Processes

The batch and Registry de-duplication are separate processes that run at different times, either with the same or different match rules. For illustration purposes, this diagram describes both de-duplication processes:



1. TCA Registry attributes are transformed for the staged schema. The attributes to include in the schema, as well as the transformations to use on each attribute, are defined in the Define Attributes and Transformations page.  
 Also defined are the attribute and transformation combinations to be used for bulk duplicate identification. The staged schema includes B-Tree indexes only for the transformed attributes marked for bulk duplicate identification.
2. The user specifies a match rule with Bulk Duplicate Identification purpose for the de-duplication.
3. When the de-duplication process starts, the acquisition and scoring transformations are applied to the attributes in the interface tables, based on the selected match rule.
4. The transformed interface table records are mapped and loaded into the interface search tables, a set of temporary staged tables with B-Tree indexes.
  - HZ\_SRCH\_PARTIES
  - HZ\_SRCH\_PSITES
  - HZ\_SRCH\_CONTACTS
  - HZ\_SRCH\_CPTS
5. To find duplicates within the TCA interface tables:

- The interface search tables are joined with themselves.
- The acquisition match criteria of the same match rule is applied to compare each record against all other records in the same staged table simultaneously.

For example, an acquisition criterion is the DUNS Number attribute with the Exact transformation. All DUNS Numbers, as transformed by the Exact transformation, would be compared against one another.

To find duplicates between the TCA interface tables and the TCA Registry:

- The interface search tables are joined with the staged schema. The two sets of staged tables have the same columns. This table shows the mapping between the interface search and staged schema tables:

Entity	Interface Search Table	Staged Schema Table
Party	HZ_SRCH_PARTIES	HZ_STAGED_PARTIES
Address	HZ_SRCH_PSITES	HZ_STAGED_PARTY_SITES
Contact	HZ_SRCH_CONTACTS	HZ_STAGED_CONTACTS
Contact Point	HZ_SRCH_CPTS	HZ_STAGED_CONTACT_POINTS

- The acquisition match criteria of the same match rule is applied to compare all records in each interface search table against all records in the staged schema using only B-Tree indexes.
6. Matched acquisition attribute values determine the most relevant subset of records from the interface search tables to form the work unit.
  7. Using the scoring criteria in the match rule, each record in the work unit is compared to all other work unit records in the same staging table.
  8. A score is calculated for each record in the work unit, and scores for all entities are added together for determining duplicate parties.
  9. The score of each work unit record is compared against the match and automatic merge thresholds defined in the match rule.
    - Records with scores above the match threshold are selected as potential duplicates and resolved accordingly.
    - For Registry de-duplication, records with scores that also exceed the automatic merge threshold are automatically merged after import, if the match rule is allowed for Automerge.

## Related Topics

Setting Up Bulk Import, page 2- 6

Bulk Duplicate Identification, page 5- 7

## Setting Up eLocations Spatial Data Integration

eLocations Spatial Data Integration allows for retrieving spatial information from Oracle eLocations and storing the longitude and latitude data for addresses in the TCA Registry.

### Procedure

- Set profile options.
    - HZ: Detailed Concurrent Program Output
  - These three profile options are for the HTTP post to eLocations. They determine the URL, proxy host, and proxy port to use.
    - HZ: Spatial Provider URL
    - Applications Server-Side Proxy Host And Domain or HZ: Web Server Proxy Host Name
    - Applications Proxy Port or HZ: Web Server Proxy Port
- Note:** If you are on Release 11.5.7 or later, use the Applications Server-Side Proxy Host And Domain and Applications Proxy Port profile options. If you are on Release 11.5.6 or earlier, use the HZ: Web Server Proxy Host Name and HZ: Web Server Proxy Port profile options.

See: Setting Profile Options, page B- 1 .

- Submit the Locations Spatial Index Rebuild program to create and periodically rebuild the spatial index on the HZ\_LOCATIONS table. See: Locations Spatial Index Rebuild, page 2-10.

### Related Topics

eLocations Spatial Data Integration, *Oracle Trading Community Architecture User Guide* Feature-Specific Implementation, page 2- 4

### Locations Spatial Index Rebuild

Use the Locations Spatial Index Rebuild program to rebuild the spatial index on the HZ\_LOCATIONS table. You should periodically rebuild the spatial index to optimize performance and accuracy for queries on the spatial data in this table.

You can schedule this program to run on a periodic basis. If possible, rebuild the index when users are not querying spatial data because the Locations Spatial Index Rebuild program interferes with user spatial operations.

**Note:** You cannot run the Locations Spatial Index Rebuild program if the Spatial Information for Locations Batch Update program is running.

If the HZ: Detailed Concurrent Program Output profile option is set to *Yes*, then you can view a detailed report about the records that the Locations Spatial Index Rebuild program processed.

### Related Topics

Setting Up eLocations Spatial Data Integration, page 2-10

## Setting Up Party Merge

Party Merge involves merging parties that are confirmed as duplicates, either from a duplicate identification batch or a manually created merge batch.

### Procedure

- Define any custom entities and merge procedures.
- Define the Merge Dictionary to determine the entities and procedures that must be processed to merge party entities, page 5-48. You can set up the Merge Dictionary for all Oracle Applications that you use to interact with parties.
- You can optionally set up any merge procedure registered with the Merge Dictionary to prevent the deletion of records, if your company's business rules require that parties cannot be deleted. To prevent deletion, a merge procedure must call the HZ\_PARTY\_MERGE.veto\_delete procedure. At the end of the merge process, if none of the merge procedures has vetoed the deletion of the merge-from parties, then those party records are deleted.
- If you are using Party Merge along with Oracle Credit Management and experiencing bad performance for Party Merge, then create nonunique indexes on the PHONE\_ID column of both the AR\_CUSTOMER\_CALLS\_ALL and AR\_CUSTOMER\_CALL\_TOPICS\_ALL tables.

### Related Topics

Party Merge Overview, *Oracle Trading Community Architecture User Guide*  
Feature-Specific Implementation, page 2- 4

## Setting Up Relationship Manager

Relationship Manager allows users to manage relationships among existing parties in the TCA Registry. Relationship Manager uses the relationship types that you administer. See: Administering Relationships, page 3- 1 .

You can also set up Data Quality Management (DQM) for the party search in Relationship Manager. DQM provides powerful search functionality, based on a match rule that determines which search criteria are available and how to select and rank the results. You can use a seeded search match rule or create new rules. Relationship Manager's party search uses the rule that is assigned to the HZ: Match Rule for Relationship Manager Search profile option.

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

### Procedure

1. Administer Data Quality Management, page 5- 9 .

Optionally create one or more match rules with the Search purpose.

- 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.
- If you define a match rule set, remember that the superset of all attributes in the set is displayed as search criteria.

2. Assign the match rule that you want to use for the party search to the HZ: Match Rule for Relationship Manager Search profile option. See: Setting Profile Options, page B- 1 .

## Related Topics

Searching for Parties and Viewing Results, *Oracle Trading Community Architecture User Guide*

Data Quality Management Overview, page 5- 1

Feature-Specific Implementation, page 2- 4

## Setting Up Third Party Data Integration

Third Party Data Integration allows for acquiring information from D&B for the TCA Registry. To enable purchase of D&B data, you must integrate with D&B. Without third party data, there is no need to use or administer Third Party Data Integration.

After you set up Third Party Data Integration with D&B, you can optionally administer Source System Management to control how the D&B and user-entered data are used and displayed. See Administering Source System Management, page 10- 2 .

## Procedure

1. Establish a contract with D&B for its Data Rationalization Service. Contact your D&B relationship manager to contract for the services that meet your data requirements.

If you do not have a relationship manager assigned to your company, contact D&B's Global Service Center at (888) 243-4566, e-mail [dnb4oracle@dnb.com](mailto:dnb4oracle@dnb.com), or visit <http://www.dnb.com>. You can also contact D&B for information to interpret credit ratings and other information that D&B provides.

2. D&B provides information that you need to access the D&B database from Third Party Data Integration:

- D&B HTTPS URL, which is <https://toolkit.dnb.com/access/scripts>
- D&B user name
- D&B password

**Tip:** You can request multiple user names and passwords if you want to assign different ones to your users, for example, to track D&B transactions by user.

3. Contact your information technology department or organization for information about your web server.

- Servlet agent URL
- If you use a proxy server:
  - Web server proxy host name
  - Web server proxy port
  - Web server proxy user name (optional)
  - Web server proxy password (optional)

4. Use the information from D&B and your information technology organization to set up the profile options listed in this table.

Profile Option	Value
Apps Servlet Agent	Servlet agent URL
HZ: D&B Password	D&B password
HZ: D&B URL	<i>https://toolkit.dnb.com/access/scripts</i> , the D&B HTTPS URL
HZ: D&B User Name	D&B user name
HZ: Web Server Proxy Host Name	Web server proxy host name
HZ: Web Server Proxy Password	Web server proxy password
HZ: Web Server Proxy Port	Web server proxy port
HZ: Web Server Proxy User Name	Web server proxy user name

See: Setting Profile Options, page B- 1 .

5. For batch loading D&B data into the Registry:
  - Set up Bulk Import. See: Setting Up Bulk Import, page 2- 6 .
  - Manually create a directory object on the same environment as your TCA database. A directory object is a database object that stores the absolute path of a physical directory on the database node. Name this object HZ\_DNB\_SOURCE\_DIR, and make sure the database server can read and write from the location identified by the directory object.

For example, create the directory object in APPS as follows:

```
CREATE or replace DIRECTORY HZ_DNB_SOURCE_DIR AS '/emslog/dnb'
```

If the object is not in APPS, you must also grant access to APPS:

```
GRANT READ ON DIRECTORY HZ_DNB_SOURCE_DIR TO apps;
GRANT WRITE ON DIRECTORY HZ_DNB_SOURCE_DIR TO apps;
```

- Optionally create a request set with the D&B Import Adapter request set and the Import Batch to TCA Registry program. Users can run the new request set to batch load into interface tables and import into TCA Registry in one step.

This table shows the recommended settings for automating D&B batch load import after loading into interface tables.

<b>Import Parameter</b>	<b>Default for D&amp;B Batch Load</b>
Run Batch De-Duplication	No
Batch De-Duplication Match Rule	None
Run Address Validation	No
Run Registry De-Duplication	Yes
Registry De-Duplication Match Rule	Custom match rule with heavy weights on Address attributes

### **Related Topics**

Third Party Data Integration Overview, *Oracle Trading Community Architecture User Guide*  
 Feature-Specific Implementation, page 2- 4

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## Relationships

This chapter describes setting up for relationships, including creating, copying, and converting relationship types, adding new relationship phrase and role pairs to existing types, and assigning phrase and role pairs to relationship groups.

This chapter covers the following topics:

- Administering Relationships
- Searching for Relationship Types
- Creating Relationship Types
- Viewing and Converting Relationship Types
- Copying Relationship Types
- Adding Relationship Phrase and Role Pairs to Relationship Types
- Assigning Relationship Phrases and Roles to Relationship Groups

### Administering Relationships

Set up relationship types and relationship phrase and role pairs that can be used to create relationships among entities in the TCA Registry. These relationships are shared throughout the Oracle E-Business Suite. See: Relationships Overview, *Oracle Trading Community Architecture User Guide*.

Oracle Trading Community Architecture provides seeded relationship types and phrase and role pairs, but you can create new ones as needed. See: Seeded Relationship Types, Phrases, and Roles, *Oracle Trading Community Architecture Reference Guide*.

Relationships administration lets you:

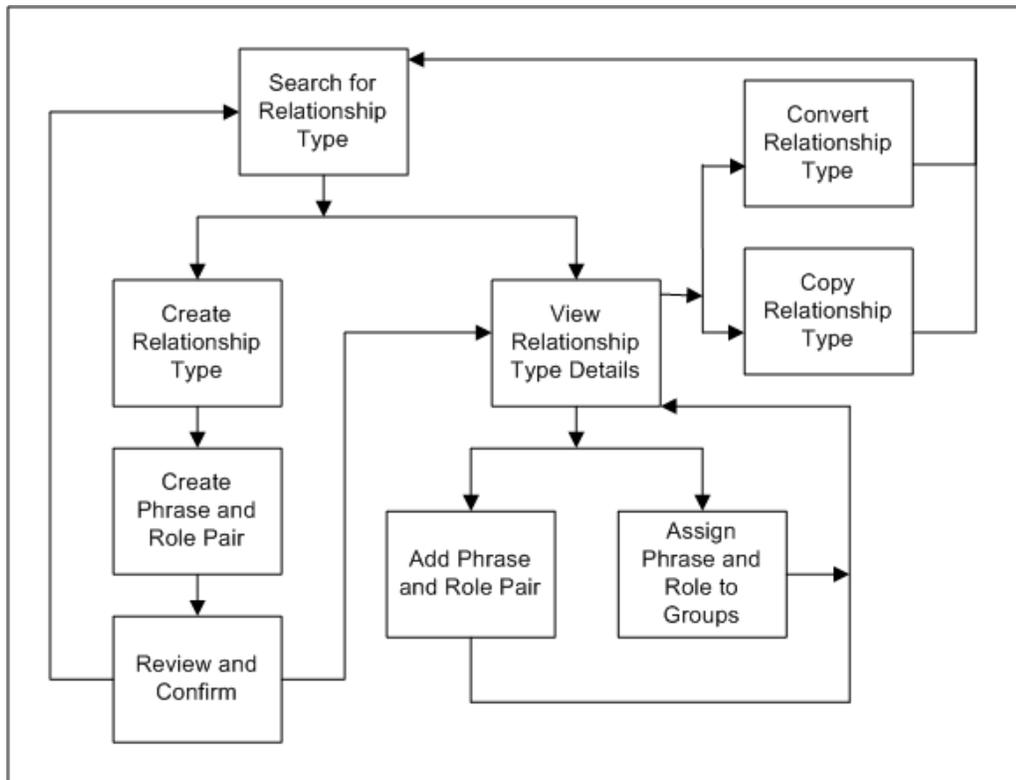
- Create relationship types, including a relationship phrase and role pair for each new type, page 3- 3 .
- Convert nonhierarchical relationship types into hierarchical types, page 3- 4 .
- Copy relationship types and, optionally, also the relationships, page 3- 5 .
- Add phrase and role pairs to existing seeded or user-created relationship types, page 3- 6 .

**Note:** You cannot update the definition of existing relationship types. You can only add phrase and role pairs to them.

- Assign phrase and role pairs to relationship groups, page 3- 7 .

## Administration Process

This diagram describes the process flow of setting up relationship types as well as phrase and role pairs.



1. Search for a relationship type that you want to view, or to make sure that the relationship type you want to create does not already exist. See: Searching for Relationship Types, page 3- 3 .
2. If you do not see the relationship type that you want in the search results, you can create a new type. Otherwise, select a relationship type from the results and view its details.
3. If you are creating a new relationship type, you:
  1. Define and create the relationship type.
  2. Create a relationship phrase and role pair for the relationship type.
  3. Review and confirm your definitions.
  4. Return to search for another relationship type or view details of the type that you just created.See: Creating Relationship Types, page 3- 3 .
4. If you are viewing details for a selected or newly created relationship type, you can:
  - Convert the relationship type, if it is nonhierarchical, into a hierarchical type, or copy the relationship type to create a new type. See:
    - Viewing and Converting Relationship Types, page 3- 4 .

- Copying Relationship Types, page 3- 5 .

After you convert or copy a relationship type, you return to the Relationship Type page.

- Add a relationship phrase and role pair to the type or to assign phrases and roles from this relationship type to relationship groups. See:
  - Adding Relationship Phrase and Role Pairs to Relationship Types, page 3- 6 .
  - Assigning Relationship Phrases and Roles to Relationship Groups, page 3- 7 .

After you add a phrase and role pair or assign to relationship groups, you return to view the details of your relationship type.

## Related Topics

Introduction to Administration, page 1- 1

## Searching for Relationship Types

Use the Relationship Type page to search for the relationship type that you want to view, copy, convert, add relationship phrase and role pairs to, or assign to relationship groups. You also search to make sure that the relationship type you want to create does not already exist.

The search results display not only the relationship type name but also whether it is a hierarchical relationship type or not and whether circular relationships are allowed or not. You also see when and by whom the relationship type was created.

**Note:** If the relationship type is seeded, the Created By column displays *ORACLE* and the Creation Date column shows the date that the relationship type record is created in your database.

You can view concurrent requests for the processes of copying or converting relationship types.

## Related Topics

Administering Relationships, page 3- 1

## Creating Relationship Types

Use the Create Relationship Type pages to create a new relationship type along with a relationship phrase and role pair for the new type. After you search for the relationship type to make sure that it does not already exist, you follow a three-step process to create a new type.

You also specify whether the new type would create hierarchical relationships or not. If you create a nonhierarchical relationship type, you also determine if circular relationships are allowed with this relationship type or not.

### To create a new relationship type:

1. Search for the relationship type to make sure that it does not already exist. See: Searching for Relationship Types, page 3- 3 .

2. Click Create after you verify that the relationship type is not in the search results.
3. In the Create Relationship Type page, enter the name of your relationship type and determine the relationship type's definition for hierarchical and circular relationships.
4. Create a relationship phrase and role pair for this relationship type. See steps 3 to 5 in Adding Relationship Phrase and Role Pairs to Relationship Types, page 3- 6 .
5. Review your relationship type and phrase and role pair definitions.
6. Go back to make any necessary changes. Otherwise, click Finish.
7. From the confirmation page, you can choose to:
  - View details of the relationship type that you just created, page 3- 4 (start at step 3).
  - Search for or create another relationship type, page 3- 3 .

## Related Topics

Administering Relationships, page 3- 1

## Viewing and Converting Relationship Types

Use the Overview page to view the definition of a relationship type and its included relationship phrase and role pairs. For each relationship phrase and role pair, the Relationship Phrase and Role Pairs table displays:

- The subject role and phrase
- The subject and object type, for example Organization or Person

You can convert the relationship type into a hierarchical type, only if the relationship type is not:

- Already hierarchical
- Seeded
- Circular, with phrase and role pairs that contain the same values for both the subject and object

**Important:** The conversion process fails if there are existing circular relationships using the relationship type.

You can access the concurrent request for the conversion process in the Relationship Type page. See: Searching for Relationship Types, page 3- 3 .

### To view the details of a relationship type:

1. Search for the relationship type that you want to view. See: Searching for Relationship Types, page 3- 3 .
2. In the Search Results table, click the relationship type that you want to view details for.

**Note:** You can also navigate to the Overview page after you create a new relationship type. See: Creating Relationship Types, page 3- 3 .

3. View the relationship type details. You can choose to:
  - Convert the relationship type from nonhierarchical to hierarchical if you need to create hierarchies with this type.
  - Copy the relationship type, page 3- 5 .
  - Add a relationship phrase and role pair to this relationship type, page 3- 6 .
  - Assign any of the displayed phrases and roles to relationship groups, page 3- 7 .

## Related Topics

Administering Relationships, page 3- 1

## Copying Relationship Types

Copy existing relationship types to create new relationship types, which would have the same relationship type definition except for the name. The relationship phrase and role pairs are also copied over, but you need to append a prefix or suffix to each copied role to keep all roles unique.

You can also copy all relationships along with the relationship type. For example, the relationship that Joe is the employee of Oracle exists for the Oracle Employment relationship type. You copy the relationship type, name it OracleHQ Employment, and prefix the relationship roles with *HQ*. If you also copy the relationships, you would get this relationship with the OracleHQ Employment type: Joe is the HQ employee of Oracle.

Before you define the new relationship type in the Copy Relationship Type page, you first find and view the relationship type that you want to copy from. See: Viewing and Converting Relationship Types, page 3- 4 .

Instead of using the Copy of Relationship Type page, you can also run the Copy Relationship Type and All Relationships program, if available to you.

## Program Parameters

Enter these parameters to run the Copy Relationship Type and All Relationships program from Standard Request Submission.

- **Source Relationship Type:** Enter the relationship type you are copying from.
- **Target Relationship Type:** Enter the name of the new relationship type, which cannot be the same as the source relationship type name.
- **Target Relationship Type Role Prefix:** Enter the prefix for the copied relationship roles. You can only enter either a prefix or suffix, not both.
- **Target Relationship Type Role Suffix:** Enter the suffix for the copied relationship roles. You can only enter either a prefix or suffix, not both.
- **Relationship Valid Date:** Enter the start date for all copied relationships. You do not copy relationships along with the relationship type unless you enter this date.

## Related Topics

Administering Relationships, page 3- 1

## Adding Relationship Phrase and Role Pairs to Relationship Types

Use the Add Relationship Phrase and Role Pair pages to add a relationship phrase and role pair to an existing relationship type. Similarly, you also define a phrase and role pair when you create a new relationship type.

For the subject and object of the relationship phrase and role pair, you define:

- The type, for example Person or Organization
- The relationship phrase, either an existing one from another relationship type or a new user-defined phrase
- The singular and plural relationship role

What you define for the subject and object also determines the phrases, roles, and types for the reciprocal direction of the pair. For example, if you enter:

- Subject type: Organization
- Subject phrase: Employer Of
- Subject role: Employer and Employers
- Object type: Person
- Object phrase: Employee Of
- Object role: Employee and Employees,

then the relationship phrase and role pair is defined as shown in this table:

Subject Role	Subject Type	Subject Phrase	Object Type
Employer	Organization	Employer Of	Person
Employee	Person	Employee Of	Organization

### To add a relationship phrase and role pair to a relationship type:

1. View the relationship type that you want to add phrase and role pairs to. See: Viewing and Converting Relationship Types, page 3- 4 .
2. Click Add Relationship Phrase and Role Pair.

**Note:** Adding a phrase and role pair is also part of the relationship type creation process. See: Creating Relationship Types, page 3- 3 .

3. Enter the subject type and subject relationship phrase.

It does not matter which phrase is defined as the subject phrase, for example, Wife Of or Husband Of.

For hierarchical relationship types, however, the defined subject is the parent, which ranks above the object, or child. For example, you would enter Employer Of and not Employee Of as the subject phrase to imply that the employer ranks above the employee. The employee, of course, is still the subject of the relationship when viewed from his or her perspective, for example, Joe as the employee of Oracle.

**Important:** You cannot reuse phrases that are already defined in the same relationship type with the same subject and object type

combination. For example, if Parent and Child are already defined with subject and object type Person in the Family relationship type, you cannot create phrase pairs such as Parent and Son, or Mother and Child, in the Family relationship type with Person subject and object types.

4. Enter the singular and plural relationship roles that describe the subject.

The roles can be a combination of the relationship type and phrase. For example, if the type is Oracle Employment and the phrase is Employee Of, the role can be Oracle Employee.

This method of defining roles helps you keep roles unique and differentiate between roles of similar relationship types. For example, if you have another relationship type called Elcaro Employment, you would define Elcaro Employee as the role. You cannot have duplicate roles such as Employee for both relationship types.

5. Enter the corresponding information for the object.
6. Click Apply.
7. The confirmation takes you back to view the relationship type with your phrase and role pair added. See: *Viewing and Converting Relationship Types*, page 3- 4 .

## Related Topics

*Administering Relationships*, page 3- 1

## Assigning Relationship Phrases and Roles to Relationship Groups

Use the Assign to Relationship Groups page to assign relationship phrases and roles to relationship groups. You can assign each phrase within a relationship phrase pair and type to a different set of groups. The phrase assignment automatically determines the assignment of the corresponding role.

For example, you can assign the relationship phrase Employer Of to a set of groups that differ from the assignments for Employee Of. The corresponding relationship role Employer would have the assignments of Employer Of, and likewise Employee with assignments of Employee Of.

Relationship groups are mainly used to determine which user interfaces in Oracle applications each phrase and role is available in. Each relationship group corresponds to one or more Oracle Applications user interfaces. Examples of groups include Customer Account Information, Party Families, Party Contacts, Party Corporation Hierarchy, and Party Customers.

For example, you would assign phrases for customer relationships to the Party Customers group. These phrases and their corresponding roles would then be available in Oracle Applications user interfaces with customer related functionality.

### To assign a relationship phrase and role to relationship groups:

1. View the relationship type with the phrase and role that you want to assign to relationship groups. See: *Viewing and Converting Relationship Types*, page 3- 4 .
2. Click Assign to Relationship Groups.

3. In the Assign to Relationship Groups page, select the phrase that you want to assign and click Go. The Assign Relationship Phrase to Groups region displays the current assignments for the selected phrase.
4. Move relationship groups between the two boxes as needed. The relationship phrase and its corresponding relationship role are assigned only to the relationship groups in the Assigned Relationship Groups box.
5. Click Apply. The confirmation takes you back to view the same relationship type. See: Viewing and Converting Relationship Types, page 3- 4 .

## **Related Topics**

Administering Relationships, page 3- 1

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# Classifications

This chapter describes administering classifications, including creating and updating class categories and codes.

This chapter covers the following topics:

- Classifications Overview
- Administering Classifications
- Searching for an Existing Class Category
- Creating a Class Category
- Assigning Entities to a Class Category
- Creating a Class Code
- Updating a Class Category
- Updating a Class Code
- Viewing a Class Code Hierarchy
- Copying a Class Category
- Refresh of Classification Denormalization

## Classifications Overview

The TCA Classifications model provides a flexible tool that you can use to categorize entities, which can include parties, projects, tasks, orders, and so on. Classifications can use different paradigms and does not restrict you to a single way to classify an entity. This enables you to classify an entity, such as a party, in a way that the rest of the world sees it, in addition to the way it is referenced within your organization. This is extremely helpful when you map the internal representation of a company's environment to the way that the outside world models it.

The major components of the TCA Classifications model are:

- **Class category:** A broad subject area within which you can classify parties. A class category is a logical grouping of one or more class codes and allows for rules to be defined for how the category code structure is set up, as well as which entities can be assigned to these categories.

You can define class categories to meet the needs of your organization. For example, you can define class categories consistent with special business considerations, pricing arrangements, or terms for a party.

- **Class code:** A specific value of the class category. These class codes can be organized in a hierarchical fashion. Class codes are grouped together into categories.

For example, if you want to specify the industry sector to which a party belongs, you can use a predefined class category, such as SIC 1987, which includes the 1987 version of US Standard Industrial Classification (SIC) codes. For example, within the SIC 1987 class category, you could assign the class code Software to a party in the software industry.

All classifications are made up of two key components: a class category and class code. In the user interface, the classification scheme you create is called a class category or classification. The individual values within the classification scheme are called class codes.

- **Classification rules:** The Classifications model allows class categories to have rules and characteristics which define how classifications can be assigned to entities. When you set up class categories, you can create specific rules such as allowing for multiple parents for the codes in the category. For example, a Hardware class category could include the tangible components of a computer system.

Entities with multiple classifications can have the classifications ranked in order of importance for the particular entity. A party can have multiple class codes associated with it. A ranking of these codes could be useful. For example, Oracle could have databases and applications linked to it as separate codes. If you are part of an organization interested in databases, you might rank the Database class code higher than the Application class code.

- **Class code hierarchy:** A hierarchy of class codes within a class category. For example, you could set up the High Tech class category, and the class codes associated with the High Tech class category are: Software, Hardware, Applications, PCs, Printers, and Consulting. These codes are set up in a hierarchical manner by assigning the parent codes to the appropriate children.

High Tech

- Software
  - Applications
  - ERP applications
  - CRM applications
  - Consulting
- Hardware
  - PCs
  - Printers
  - Consulting

When you create a class code hierarchy, three options are available to administer the hierarchy. You can:

- Assign one or more parents to a code. As shown in the example above, Consulting can be found under both the Hardware and Software parent class codes.

- Allow one or more codes to be assigned to an entity. Using the schema above, both Applications and Printers could be assigned to an Organization party.
- Allow the assignment of higher level codes to an entity, not just the lowest level code. With the schema above, for example, a company could be assigned the Software code, even though that code is not at the lowest level, or leaf, node.

The Create Class Category and Update Class Category pages provide a list of the valid entities that the class codes within a class category can be assigned to.

## Standard and Custom Classification Schema

A classification schema can be built using standards such as the NAICS (North American Industrial Classification System), NACE (European Union's Statistical Classification of Economic Activity), or SIC (Standard Industrial Classification) classification schema, or on user-defined classifications based on your organization's business needs. 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.

If you use the seeded standard classification schema, then you do not have to set up user-defined categories and codes.

The Oracle Trading Community Classifications model includes the following standard class categories and class codes:

- **SIC 1987:** The 1987 version of the US SIC schema. This is the most popular industrial classification in U.S.
- **NACE:** The industrial classification schema used in European countries.
- **NAICS:** Introduced in 1997 to replace the SIC schema.
- **SIC 1972:** The 1972 version of the US SIC schema. Used by Dun & Bradstreet for classifying companies in Canada.
- **SIC 1977:** The 1977 version of the US SIC schema. Used by Dun & Bradstreet for classifying companies in European countries.

## Administering Classifications

Administration for seeded or user-defined classifications includes:

- Searching for an existing class category, page 4- 4
- Creating a class category, page 4- 5
- Copying a class category, page 4-10
- Assigning an entity to a class category, page 4- 6
- Updating a class category, page 4- 8
- Creating a class code, page 4- 7
- Updating a class code, page 4- 9
- Assigning a parent class code, page 4- 7
- Refreshing the classifications data, page 4-10

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.

### **To administer classifications:**

1. Search for class categories to update or to confirm that the class category you want to create does not already exist.
2. Define class categories, including assigning entities to and creating class codes for the category.
3. Optionally, define the hierarchy of class codes within a category. Assign the parent codes to the appropriate children codes, for example:
  - Software is the a parent of Applications.
  - Applications is the parent of ERP applications.

### **Related Topics**

Classifications Overview, page 4- 1

## **Searching for an Existing Class Category**

Use the Classifications page search for a class category to view and update or to confirm that a class category does not already exist before you create a new category. In the Search region of the Classifications page, you can enter several criteria to search the existing class codes. Your initial search should be broad enough to find class categories that may be similar to the one you plan to create.

**Note:** You can search for compiled or uncompiled categories. However, to be able to use a class category and assign it to an entity, the class category must be in the compiled state.

### **To search for a class category:**

1. Navigate to the Classifications page.
2. Enter search criteria for the class category or the class code in the appropriate fields of the Search region. You can also select Yes or No in the Compiled poplist to filter the results by whether or not the class category or class code is compiled.
3. Click the Go button to start your search.
4. View the results.
5. If the appropriate class category is not found, click the Create Class Category button to create a class category. See: Creating a Class Category, page 4- 5 .

## Related Topics

Administering Classifications, page 4- 3

## Creating a Class Category

Use the Create Class Category page to define class categories. When you create a class category you must provide required information that identifies and describes the class category.

- Assign a name, meaning, and description to a category, for example, High Tech.
- Define rules for using the class category.
  - Allow single or multiple parent codes. For example, class codes in a High Tech category can have multiple parent codes.
  - Allow single or multiple parent code assignments. For example, you can assign the Hardware, PCs, or both to Vision Corporation.
  - Allow parent class code assignments. For example, you can assign class codes to Vision Corporation at any level of the hierarchy, Hardware or PCs, not just the lowest level of PCs.
  - Define what types of entities use the class codes. A seeded list of tables restricts the use of class codes. For example, the SIC Code categories are restricted to Organization parties.

You also assign at least one entity to the class category and create at least one class code for the new category.

To create a class category that is similar to an existing one, you can copy the existing category. See: Copying a Class Category, page 4-10.

### To create a class category:

1. In the Classifications page, make sure that the class category you want to create does not already exist and click the Create Class Category button. See: Searching for an Existing Class Category, page 4- 4 .
2. Enter the required information in the appropriate fields.
3. Select any of the optional attributes for this class category:
  - **Allow Multiple Parent Codes:** You can select this check box to allow any node in your hierarchy to have more than one parent. Clearing this check box restricts the class category to only one parent.
  - **Allow Parent Code Assignment:** You can select this check box to allow the assignment of parent nodes in the class code hierarchy. Clearing this check box requires that you must use leaf nodes, nodes that have no children, for the class category.
  - **Allow Multiple Class Code Assignments:** You can select this check box to allow a user to classify a customer, opportunity, or other entity using more than one class code from this class category. Clearing this check box prevents users from assigning more than one class code to an entity.
4. In the Assign Entities region, you can assign entities to this class category. Select the appropriate entities identified by the table and column names.

5. Optionally enter, edit, or delete a condition defined with an SQL Where clause.
6. Click the Add New Entity Assignment button to add a new entity.  
For more information, see: [Assigning Entities to a Class Category](#), page 4- 6 .
7. Click the Apply and Create Class Codes button to apply and create new class codes for this category. See: [Creating a Class Code](#), page 4- 7 .

To use a class category, you must first compile it. A class category should be compiled when it is created and whenever it is updated.

### **To compile class categories:**

1. Navigate to the Classifications page.
2. Select No in the Compiled poplist.
3. Click the Go button to start your search for all uncompiled class categories.
4. Click the Compile Class Categories button.

### **Related Topics**

[Administering Classifications](#), page 4- 3

## **Assigning Entities to a Class Category**

Use the Assign Entities page or Entity Assignment region to assign entities to a class categories. You must assign an entity by entering the name of the table and the column for the appropriate entity. You can also optionally create a condition, using an SQL Where clause, to select a subset of the entities in your database.

### **To assign an entity to a class category:**

1. Navigate to the Assign Entities page or Entity Assignment region.
  - From the Create Class Category page, click the Add New Entity Assignment button and then enter the entity information in the Assign Entities page. See: [Creating a Class Category](#), page 4- 5 .
  - If you have created a copy of an existing class category, then in the Create Class Category page enter the entity information in the Entity Assignment region. See: [Copying a Class Category](#), page 4-10.
  - From the Update Class Category page that displays an existing class category, click the Add Another Entity Assignment button and enter the entity information in the Entity Assignment region. See: [Updating a Class Category](#), page 4- 8 .
2. Enter the required entity information:
  - Table name, such as HZ\_PARTIES
  - Column name, such as PARTY\_ID  
You can use the list of values to search for the table and column name.
3. Enter an optional condition in the Condition field. The condition is expressed as an SQL Where statement, such as:

PARTY\_TYPE= ' ORGANIZATION '

## Related Topics

Administering Classifications, page 4- 3

## Creating a Class Code

Use the Create Class Codes page to create the appropriate class codes for class categories. When you create the class codes you specify the name of each class code, a meaning, a description, the date when the code becomes active, and an optional date when the code is not active. You can immediately enable a class code or enable it at a later time.

### To create a class code:

1. Click the Apply and Create Class Codes button in the Create Class Category page, after you have created a class category. See: Creating a Class Category, page 4- 5 .
2. Enter the characteristics of the class code in the Class Codes region of the Create Class Codes page:
  - Name
  - Meaning
  - Description
  - Start date active
  - End date active
3. Check the Enabled check box to make the class code effective, or leave the check box clear until you are ready to enable it.

You can use the Enabled check box, along with the Start and End active dates, to control the availability of a class code. For example, you can create and enable a class code with a start date in the future. On that start date, the class code automatically becomes available for use. You can immediately make an active class code unavailable by clearing the Enable check box. Or you can inactivate a class code by specifying an end date on some day in the future.

4. Optionally assign a parent class code to at least one of the class codes. See: Assigning Parent Class Codes, page 4- 7 .

## Related Topics

Administering Classifications, page 4- 3

## Assigning Parent Class Codes

Use the Assign Class Codes page, after you have created a class category and its class codes, to make one class code the parent of another class code in a class code hierarchy. This option structures class categories and class codes in parent-child hierarchal relationships.

The assignment of parent class codes is restricted by the options available for the class category. When you create or update a class category, you can check or clear the Allow Multiple Parent Codes check box, which allows or prevents a class code from having more than one parent class code.

You can update class code definitions, including parent codes, in the Update Class Code page. See: Updating a Class Code, page 4-9 .

#### **To assign a parent class code to a new class code:**

1. Create new class codes for a new category. See: Creating a Class Code, page 4-7 .
2. In the Class Codes region, select the child class code of the parent-child relationship that you are creating.
3. Click the Assign Parent Class Codes button to navigate to the Assign Class Codes page.
4. Select a parent class code, or one or more if allowed.
  - If the Allow Multiple Parent Codes option is selected, then you can select one or more class codes.
  - If the Allow Multiple Parent Codes option is not selected, then you can only select one class code.
5. Click the Assign button.

## **Updating a Class Category**

Use the Update Class Category page to update the information associated with an existing class category, such as the meaning, description, delimiter, and entity assignment for a class category.

#### **To update an existing class category:**

1. Search for the class category that you want to update. See: Searching for an Existing Class Category, page 4-4 .
2. In the Results region, click the appropriate class category.
3. In the Update Class Category page, you can update the information about the class category in the Class Category Details region and the Entity Assignment region. See: Creating a Class Category, page 4-5 and Assigning Entities to a Class Category, page 4-6 .
4. Click the Compile button to save your work.

For user-defined class codes, you can navigate to the Update Class codes page from this page to revise information about class codes. For more information, see: Updating a Class Code, page 4-9 .

## **Related Topics**

Administering Classifications, page 4-3

## Updating a Class Code

Use the Update Class Codes page to update the information associated with existing class codes, such as the meaning, description, parent, end date, and whether the class code is enabled or disabled.

### To update an existing class code:

1. Search for the class category with the class codes that you want to update. See: Searching for an Existing Class Category, page 4- 4 .
2. In the Classifications page, click the Update Class Codes icon for the class category with the class codes that you want to update.
3. In the Update Class Codes page, revise the information about the class codes, as necessary. You can revise the information in the following fields:
  - Meaning
  - Description
  - Parent Class Code
  - End Date Active

**Note:** The Start Date Active date cannot be changed.

4. Check or clear the Enabled check box to enable or disable the class code.
5. Save your work.

If the class code that you want to update is not found, then you must create the class code. For more information, see: Creating a Class Code, page 4- 7 .

### Related Topics

Administering Classifications, page 4- 3

## Viewing a Class Code Hierarchy

You can access the class code hierarchy for viewing by clicking the View Class Code Hierarchy button on the Update Class Codes page to bring up the View Class Code Hierarchy page. See: Updating a Class Code, page 4- 9 .

On the Update Class Category page you can also view the class code hierarchy. See: Updating a Class Category, page 4- 8 .

For each class code you can view:

- Class code meaning
- Class code
- Description
- Start date active
- End date active

To update the class code hierarchy, see: Updating a Class Code, page 4- 9 .

## Related Topics

Administering Classifications, page 4- 3

## Copying a Class Category

Use the Copy Classification feature on the Classifications page to create similar class categories. You can copy an existing class category and then edit the information about that class category to create similar class categories.

Although class codes are associated with a class category, you cannot edit the class codes for a copy of a class category in the Create Class Category page. You must edit the copy of a class category and then, if necessary, edit the class codes in the Update Class Codes page.

### To copy a class category:

1. Search for the class category that you want to copy. See: Searching for an Existing Class Category, page 4- 4 .
2. Click the Copy Classification icon for the class category that you want to copy.
3. In the Create Class Category copy page, edit the class category details and entity assignments as necessary. See: Creating a Class Category, page 4- 5 and Assigning Entities to a Class Category, page 4- 6 .
4. To update the class codes for the category, see Updating a Class Code.

## Related Topics

Administering Classifications, page 4- 3

## Refresh of Classification Denormalization

Use the Refresh of Classification Denormalization program to perform a data refresh to populate the HZ\_CLASS\_CODE\_DENORM denormalization table. This table is populated from these source tables:

- FND\_LOOKUP\_TYPES\_TL
- FND\_LOOKUP\_VALUES
- HZ\_CLASS\_CATEGORIES
- HZ\_CLASS\_CATEGORY\_USES
- HZ\_CLASS\_CODE\_RELATIONS

You should schedule this program to periodically run, but manually run the program under the following circumstances:

- The first time you install a patch which contains the classification feature.
- Every time you enter or update classification related data outside of the Administration tab. For example, run the program 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.

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

## Program Parameters

- **Class Category:** Enter the class category that you want to refresh data for. If you leave this parameter blank, the entire HZ\_CLASS\_CODE\_DENORM denormalization table is refreshed.
- **Debug:** Specify if you want to run the program in debug mode or not.
- **SQL Trace:** Specify if you want to do SQL statement tracing or not.

## Related Topics

Administering Classifications, page 4- 3



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# Data Quality Management

This chapter describes administering Data Quality Management, including setting up word replacements, defining attributes and transformations, defining match rules, maintaining the staged schema, and maintaining the Merge Dictionary.

This chapter covers the following topics:

- Data Quality Management Overview
- Administering Data Quality Management
- Word Replacements
- Attributes for DQM
- Transformations Overview
- Defining Attributes and Transformations
- Match Rules Overview
- Defining Single Match Rules
- Defining Match Rule Sets
- DQM Compile All Rules Program
- Quality Adjusted Search Results
- Staged Schema
- Merge Dictionary Overview
- Creating Custom Merge Master Party Defaulting Method
- Automerge

## Data Quality Management Overview

Oracle Trading Community Architecture Data Quality Management (DQM) is a set of tools and features that provide powerful searching and matching functionality for search, duplicate identification, duplicate prevention, and other data management features. With a sophisticated matching mechanism, DQM can determine records that match specified search criteria, or records that are potential duplicates of another record.

TCA and other Oracle applications integrate Data Quality Management functionality for various purposes, including:

- Searches for parties, addresses, contacts, and contact points in the TCA Registry.

- Prevention of duplicate entry into the Registry when records are created or updated.
- Identifying possible duplicates that currently exist in the Registry.

For the purposes of matching records, DQM takes into account that records can contain typographical errors, spelling errors, or incomplete data. DQM copies the data into staged tables separate from the TCA Registry, and transforms and standardizes the staged records. With fuzzy searches through the transformed data in the staged tables, a set of possible matches in the TCA Registry is established.

For resolving duplicates, DQM also lets you define a repository of the entities and procedures that are processed when parties are merged. DQM also provides an Automerge feature to automatically merge records that exceed a specified threshold.

**Note:** If you have information from source systems in the TCA Registry, DQM uses the Single Source of Truth record for each party. See: Single Source of Truth Overview, page 10- 6 .

## Related Topics

Major Features, page 5- 2

Data Quality Management Examples, page 5- 4

Data Quality Management Process, page 5- 6

Administering Data Quality Management, page 5- 9

## Major Features

Data Quality Management provides various features that work together as a powerful and flexible data transformation and matching tool. These features are integrated with TCA and can be used by any Oracle E-Business Suite application to search and identify duplicates.

### Attribute Search in Entities

DQM uses attributes in these four entities, which are a subset of the TCA Registry, to search and identify matches:

- Party
- Address
- Contact
- Contact Point

Most of the attributes correspond to a table column in the TCA Registry tables. For example, party name is an attribute of the party entity, and the value for this attribute is obtained from the HZ\_PARTIES table. The party name can be one attribute that you use to evaluate if two parties are duplicates or matches, for example John Smith and Jon Smith.

You can add custom attributes if the predefined attributes do not meet your needs. These custom attributes, along with special seeded logical attributes, do not correspond to a TCA Registry column.

See: Attributes for DQM, page 5-15.

## Predefined and Customizable Search and Match Functionality

You can use predefined transformations and match rules to search and identify matching records. Transformations transform party, address, contact, and contact point attribute values into standardized representations for high quality matching. In addition to the seeded transformations, DQM provides seeded word replacement lists in American English that transformations can optionally call upon. Match rules determine and evaluate the results of the matching process.

You can define and implement custom transformations to optimize the match rules for your environment and application. You can also set up your match rules to meet your business needs.

### Transformations and Word Replacements

Transformations transform data into representations that are more similar for matching purposes. For example, transformations can replace double letters with only one of the letters, as well as remove nonalphanumeric characters and vowels. A transformation that removes vowels would change, for example, both values for an address attribute, *123 Main Rd* and *123 Mane Road*, into *123 MN RD*. This transformation allows the two attributes to be determined a match, minimizing the effects of potential spelling errors, such as *Mane*, and data entry inconsistencies, such as *Rd* versus *Road*.

Transformations use word replacement lists which create synonyms that are treated as equivalents for searching and matching. You can use word replacements to standardize certain portions of your party data to minimize the effect of data entry inconsistencies on searches. For example, a word replacement transformation can replace *California*, *Calif*, and *ca* with *CA*.

See: Word Replacements, page 5- 9 and Transformations Overview, page 5-16.

### Match Rules

Match rules determine whether two parties should be identified as a match or potential duplicate. DQM match rules can be applied, for example, when you:

- Search for TCA Registry information using search interfaces.
- Run a duplicate identification process.
- Enter or update party information through user interfaces, import interfaces, or APIs, for duplicate prevention.

Match rules support score-based matching and consist of two parts, acquisition and scoring criteria. Acquisition provides an initial set of possible matches, and scoring assigns scores to attributes to further filter matches and rank the results.

When you define match rules, you can specify which attributes are important for matching and configure how the attributes should be evaluated. For example, you can define a match rule so that only records with the same transformed party name and party number attribute values are considered matches. You can also determine how matching or similar attributes are scored to produce a total score that you can use to evaluate a record. To each attribute that you use in a match rule, you also assign transformations.

See: Match Rules Overview, page 5-20.

### Quality Adjusted Search Results

For search results, this feature provides a match percentage based on user-defined logic for quality. This logic adjusts a record's match percentage, as determined by a match rule, so that you can evaluate search results not only for how well they match the

search criteria, but also for what you consider as quality. See: Quality Adjusted Search Results, page 5-37.

## Staged Schema

The staged schema is a mirror of a portion of the TCA Registry and contains data that transformations have cleansed and standardized. Matches are determined by comparing an input record against the transformed records in the staged schema, which is separate from the TCA Registry. The Registry itself is not transformed or searched at any time. The staged schema is shared across all Oracle E-Business Suite applications.

Searches through the staged schema are actually searches against the *interMedia* or B-Tree indexes that index the schema and speed up the search process. During the acquisition phase of matching, the indexes quickly limit the number of parties to evaluate for scoring.

You can run programs in DQM to generate or update the staged schema and the indexes. For accurate searches, the staged schema can be automatically synchronized with the TCA Registry when records in the Registry are created or updated through user interfaces or TCA import.

See: Staged Schema, page 5-40.

## Merge Dictionary

The Merge Dictionary contains the entities and procedures that are processed during party merges. You define how duplicate parties are to be merged and in what order. See: Merge Dictionary Overview, page 5-47.

## Automerge

Automerge is a process that can be implemented as part of duplicate identification. Based on the setup, Automerge automatically merges records that exceed a specified threshold. See: Automerge, page 5-52.

## Globalization

Various features support using DQM in different countries and languages, including:

- Nondelimited word replacements for languages in which words are not defined as consecutive characters separated by spaces.
- Word replacements that occur only if specific conditions are met. For example, the word is replaced only if it occurs at the beginning or end of the string.
- Seeded transformations that support data from most Latin-based languages.
- Match rule sets that contain multiple match rules, with conditions to determine which rule is used, for example conditions based on the Country attribute.

## Related Topics

Data Quality Management Overview, page 5- 1

## Data Quality Management Examples

These examples illustrate using Data Quality Management to identify existing duplicates, search for parties, or prevent duplicate entries.

### Identifying Duplicate Parties

For a party called International Party Duplicates, the party name could have been entered in different ways, such as International Party Duplicates, Inc. or IPD.

You use a transformation to remove all nonalphanumeric characters and terms such as Corp and Inc, and then normalize party names into three-letter acronyms in the staged schema. Define match rules and search for duplicates.

As a result, the entries in this table are displayed as possible duplicates:

Original Value	Transformed Value in Staged Schema
IPD	IPD
I.P.D.	IPD
IPD Corp.	IPD
Intl Party Duplicates	IPD
International Party Duplicates	IPD
International Party Duplicates, Inc.	IPD

### Searching for Parties

An Oracle application has implemented DQM to create a search interface that you enter search criteria in. Transformations were created, including one that uses the DQM PL/SQL function Soundex, and the results were populated into the staged schema.

You want to search for parties of type Person with the last name Smyth who are located in California. The last name could have been misspelled and entered in different ways, such as Smith or Smythe. You enter Smyth and California in the search interface, and the Oracle application applies a match rule that includes a filter for the state of California and searches through the staged schema for search results.

This table shows the original entries in your TCA Registry.

Name	Location
Smith, James	Redwood Shores, California
Smith, Virginia	Seattle, Washington
Smyth, Edward	Los Angeles, California
Smyth, Helen	New York City, New York
Smythe, Joseph	Los Angeles, California

This table shows the Soundex representation for these names:

<b>Name</b>	<b>Soundex Representation</b>
Smith	S260
Smyth	S260
Smythe	S260

The search finds the entries in this table as possible matches:

<b>Name</b>	<b>Location</b>
Smith, James	Redwood Shores, California
Smyth, Edward	Los Angeles, California
Smythe, Joseph	Los Angeles, California

### **Preventing Duplicate Entries**

DQM was implemented to enforce the policy that no duplicates are allowed for matches on the combination of cleansed party name and address. Transformations were defined that remove all vowels and double letters, and a match rule was also defined that best expresses the policy.

As a result, you avoid populating the duplicate entries in the TCA Registry, shown in this table, because their transformed records are identical:

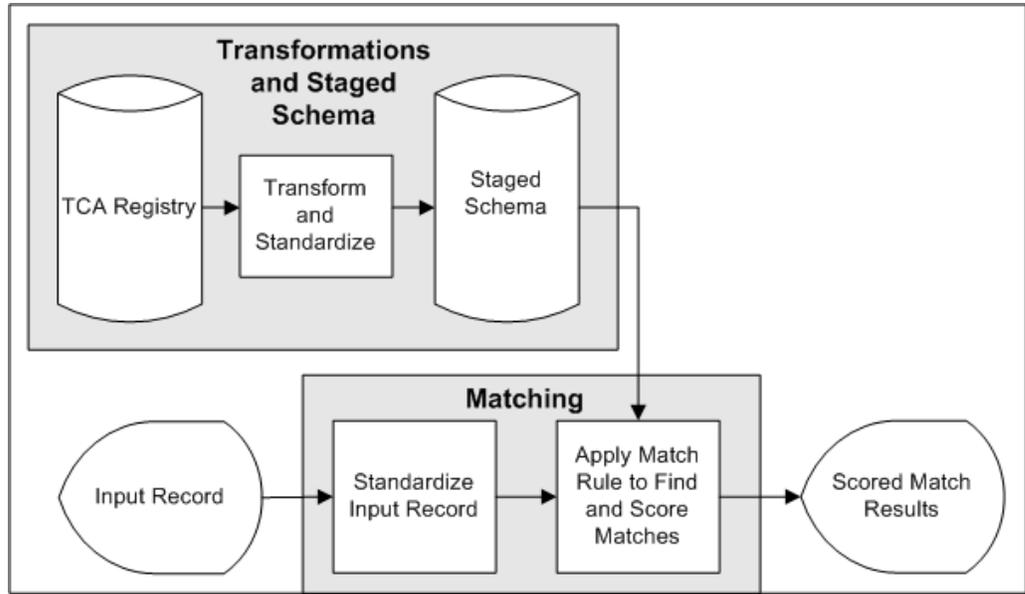
<b>Original Record</b>	<b>Transformed Record</b>
Allison Byrne, 123 S. Main Str. 11111	ALSN BRN, 123 MAIN, 11111
Alisen Burn, 123 South Main Street, 11111	ALSN BRN, 123 MAIN, 11111

### **Related Topics**

Data Quality Management Overview, page 5- 1

### **Data Quality Management Process**

This diagram illustrates how the different features of Data Quality Management work together to find matches and duplicates.



1. The TCA Registry contains party information that could have been entered with typographical errors, spelling errors, and aliases.
2. You run the DQM Staging program to transform and standardize the attribute values, such as party name and number, in a copy of the Registry, the staged schema. The attributes to include in the schema, as well as the transformations to use on each attribute, are defined in the Define Attributes and Transformations page.
3. The staged schema stores the transformed attribute values, separate from the original Registry.
4. Input records come in when you enter or search for party information, or run a duplicate identification process.
5. The transformations in a match rule transform the attribute values in the input record.
6. The same match rule is applied to compare the transformed input record attributes against the attributes in the staged schema.
7. Based on how the attributes match up, potential matches from the staged schema are identified for the input record. If the match rule contains scoring criteria, the selected records from the staged schema are also scored.
8. If quality adjustment logic is created and enabled, and you are searching for records that match entered search criteria, then the records' match percentages are adjusted for quality and reflected in the search results.

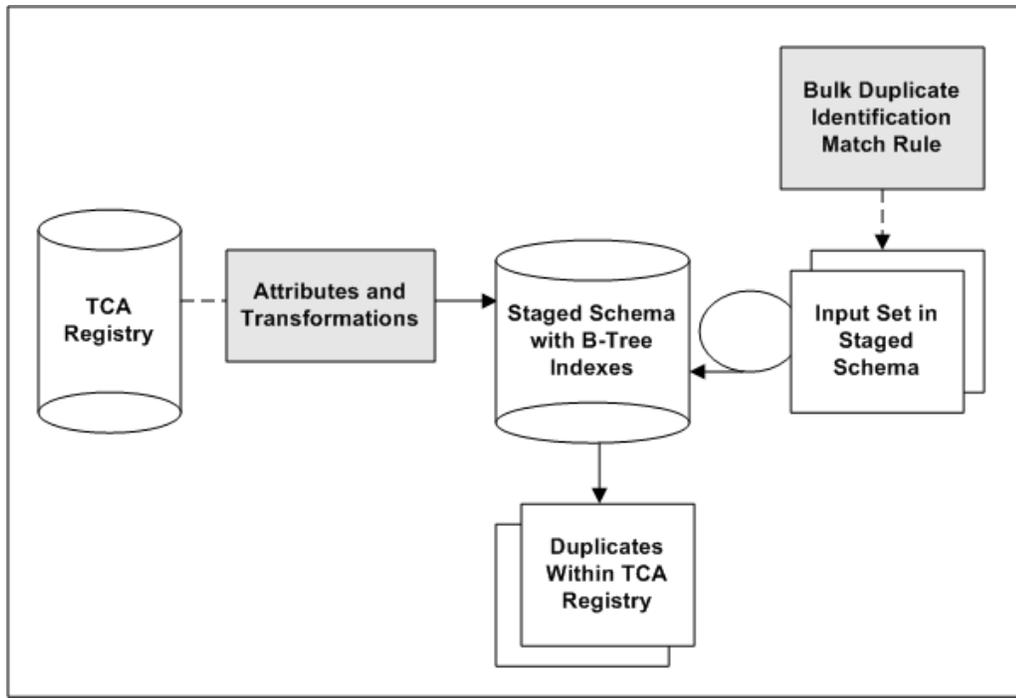
### **Bulk Duplicate Identification**

Bulk duplicate identification is a particular DQM process to identify duplicates for a large number of records within the TCA Registry. The process involves:

- B-Tree indexes in the staged schema.
- Match rules with the Bulk Duplicate Identification purpose, which include acquisition attributes and transformations that are defined for bulk duplicate identification.

Instead of comparing against the staged schema one at a time for each input record, as with simple duplicate identification, bulk duplicate identification compares the whole set of input records at once through a join procedure in the staged schema.

This diagram illustrates the bulk duplicate identification process:



1. TCA Registry attributes are transformed for the staged schema. The attributes to include in the schema, as well as the transformations to use on each attribute, are defined in the Define Attributes and Transformations page.  
Also defined are the attribute and transformation combinations to be used for bulk duplicate identification. The staged schema includes B-Tree indexes only for the transformed attributes marked for bulk duplicate identification.
2. A duplicate identification process is started, either for a subset of records in the TCA Registry or for the entire Registry. The transformed version of that set of input records is already represented in the staged schema.
3. A match rule with the Bulk Duplicate Identification purpose is applied, and the input set within the staged schema is joined with the staged schema.  
Each record in the input set is simultaneously compared against all other records in the same staged table using only B-Tree indexes.
4. Based on how the attributes match up, potential duplicates from the staged schema are identified. If the match rule contains scoring criteria, the selected records from the staged schema are also scored.

## Related Topics

Data Quality Management Overview, page 5- 1

## Administering Data Quality Management

To utilize and implement Data Quality Management (DQM) functionality, you must set up and administer the DQM tools. These tools are integrated with TCA and can be used by any Oracle Applications E-Business Suite application to search the TCA Registry and identify or prevent duplicates.

### To administer DQM:

1. Create word replacements, page 5-10.
2. Define attributes and transformations, page 5-17.
3. Generate the staged schema and indexes, page 5-42.
4. Define and compile match rules, page 5-25.
5. Optionally set up for quality adjusted search results, page 5-37.
6. Synchronize the staged schema with the TCA Registry, page 5-45.
7. Maintain the Merge Dictionary, page 5-48.
8. Define DQM profile options, page B- 1 .

**Note:** To set the HZ: Merge Master Party Defaulting profile option to *User Hook*, you must create a custom user hook. See: Creating Custom Merge Master Party Defaulting Method, page 5-50.

### Related Topics

- Data Quality Management Overview, page 5- 1
- Introduction to Administration, page 1- 1

## Word Replacements

With word replacement, you can identify words that act like synonyms of other words for the purpose of searching and matching. Transformations can use word replacements.

Word replacement is a particularly useful technique for standardizing certain portions of your party information to minimize the effect of data entry inconsistencies on searches. You can use these word replacements in the development of transformations. In the PL/SQL functions used in transformations, code can be written to call a word replacement list.

Word replacement lists contain word pairs, each pair with an original and replacement word. The replacement word is used when the original word is identified and any specified conditions are met. Aside from using seeded conditions, you can also create your own conditions. See *Creating Custom Word Replacement Conditions*, page 5-14.

The original word can be identified by either method:

- **Delimited:** As a string of alphanumeric characters preceded and followed by blank spaces
- **Nondelimited:** As a string anywhere.

For example, this table displays possible original words for a replacement word in a word list for a specified language.

Word List Name	Language	Original Word	Replacement Word
Person Name	American English	Bob	Robert
Person Name	American English	Rob	Robert
Person Name	American English	Robbie	Robert
Person Name	American English	Roberto	Robert
Person Name	American English	Bobby	Robert

When you enter *Rob* as the value for a first name attribute of a search, the search returns records in which the first name attribute matches to the replacement word for *Rob*. The result of your search would return records containing *Bob*, *Robbie*, *Roberto*, *Bobby*, and *Robert* as well as *Rob*.

After you add or modify word replacement pairs, run the DQM Staging program to update the staged schema to include the new or revised word replacement pairs. Word replacement pairs become immediately effective for any record that you add to or update in the TCA Registry.

## Seeded and Custom Word Replacement Pairs

DQM provides word replacement lists containing over 3,000 word replacement pairs in American English. The included word lists are:

- Address
- Domain (used for e-mail and URLs)
- Key modifiers
- Organization
- Person Name
- State (US only)

See: Seeded Word Replacement Lists, *Oracle Trading Community Architecture Reference Guide*.

You can add to the lists of seeded word replacement pairs in American English or create lists in any other languages supported by Oracle Applications.

## Related Topics

Creating and Updating Word Replacement Lists, page 5-10

Data Quality Management Overview, page 5- 1

## Creating and Updating Word Replacement Lists

Although DQM provides over 3,000 word replacement pairs in American English, you can modify the provided lists or create lists of word replacement pairs with words that users often enter with errors or as shortcuts.

**Important:** A new word list is not used until you create custom transformations that use the list. See: Creating Custom Transformations, page 5-19.

## Word Identification Method

When you create a completely new word list, you must specify the word identification method. You cannot change the method when you copy or update a list.

**Note:** The Nondelimited method is usually used for relevant non-English languages, such as Japanese, that are based on characters, not words separated by spaces.

### Example

*John* is the original word, *Jonathan* is the replacement word, and the attribute value is *John Johnson*. If the word replacement with the Delimited method is applied, then the attribute value becomes *Jonathan Johnson*, because only *John* surrounded by spaces is replaced. If with Nondelimited, then the value becomes *Jonathan Jonathanson*, because *John* is replaced no matter where it appears.

## Basic Word List Information

Enter a unique word list name. You can optionally define the source of the list, for example to identify a list that you created or obtained from a third party. When you update an existing list, you can change the name and source, but not the language.

## Word Replacement Pairs

For original and replacement words, you can enter not only whole words, but also abbreviations, word fragments, and numeric characters. For example, you can create a word replacement pair by entering *1* as the original word and *one* as the replacement word. If a user enters *1* to perform a search, then *one* is used to search your party information.

**Note:** No matter which word identification method is selected, do not enter original words with spaces.

For any word pair, optionally enter a condition that must be met for the replacement to occur. You must enter a value if the field is not disabled. If multiple values are possible, for example for the seeded If Country Equals condition, separate each value by a comma.

Conditions are particularly useful for country-specific word replacements. For example, in the UK, *LTD* or *Limited* is a common organization name suffix. You can specify to replace either word with a blank space only if it appears at the end of a string.

You can use the same original word multiple times in a list only if the replacement words and conditions are different. For example, you can enter *St.* twice as an original word to be replaced by the replacement words *Street* and *Saint*, with a condition for each case.

**Important:** If you use original words multiple times, the conditions are applied in the order defined, and a word is replaced according to the first condition that is met. For example, if the *St.* and *Street* word pair is defined first, and that condition is met, then the word replacement occurs. The condition for the *St.* and *Saint* word pair is skipped.

Replacement words do not have to be unique and can be left blank. You cannot, however, use the same word as both an original and replacement word in the same word list. For example, you cannot have *Street* to be replaced by *St.* in a word pair, and also *St.* to be replaced by *Saint* in another word pair.

You can create several word replacement pairs that have different unique original words with the same replacement word. This table shows an example:

Original Word	Replacement Word
Bob	Robert
Rob	Robert
Robbie	Robert
Roberto	Robert
Bobby	Robert

After you add or modify word replacement pairs, run the DQM Staging program to update the staged schema to include the new or revised word replacement pairs. For any record that you add to or update in the TCA Registry, the word replacement pairs become immediately effective after the DQM Staging program finishes. See: *DQM Staging Program*, page 5-42.

## Related Topics

Word Replacements, page 5-9

Word Replacements Tips, page 5-12

## Word Replacements Tips

When you create and use word replacements, consider these issues:

- Avoid recursive word replacement pairs that can generate inconclusive results. For example, you need to create word replacements for common variations of a name such as *Caroline*, *Carolyn*, *Carolan*, *Carole*, and *Carol*.

This table shows an example of effective word replacement pairings of original and replacement words.

### ***Effective Word Replacement Pairs***

Original Word	Replacement Word
Caroline	Carol
Carolyn	Carol
Carolan	Carol
Carole	Carol

This table shows an example of ineffective word pairings using recursive word replacement.

***Ineffective Word Replacement Pairs***

<b>Original Word</b>	<b>Replacement Word</b>
Caroline	Carolyn
Carolyn	Carolan
Carolan	Carole
Carole	Carol

- Create word replacement pairs consistent with the type of party information in the word lists for person names, addresses, organization names, or states. For example, if you apply a word replacement pair for a person name to an organization name, *Jonathan Deere* might be used as a replacement for the company name, *John Deere*.
- Create a limited number of word replacement pairs between person names and organization names.

Because some organizations are named after people, a limited number of common word replacements of person names to organization names can be appropriate. For example, your organization has regular contact with a group of professional firms such as accountants and lawyers. You can create word replacement pairs specifically for these organizations that would match person names to organization names. Word replacement pairs between different types of party information should be limited to reduce inappropriate matches.

- Create a limited number of word replacement pairs between address-related words and organization names.

Because some organizations are named after geographical locations, a limited number of word replacements of address elements to organization names can be appropriate. For example, your organization has regular contact with the Main Street Cafe. You can create a word replacement pair specifically for this organization that would match an address element to the organization name. Word replacement pairs between different types of party information should be limited to reduce inappropriate matches.

- Consider replacing the original word, or symbol, & with the replacement word *and*.

Several of the seeded transformations remove symbols such as &, that are not alphanumeric characters. If some form of conjunction is important to your searches, you should replace & with *and*. You can also avoid or customize the seeded transformations that remove &.

- Consider mapping generic address-related words such as street, avenue, and so on to a blank Replacement Word field.

People often know the proper name for an address but might not know the generic portion of the address. For example, you can broaden the search criteria so that both *Market Street* and *Market Avenue* are included in the search results as possible

matches. By mapping the words *street* and *avenue* to a blank Word Replacement field, you would broaden the possible matches.

See: Seeded Word Replacement Lists, *Oracle Trading Community Architecture Reference Guide*.

## Creating Custom Word Replacement Conditions

Create custom conditions to use with word replacement pairs. You have a lot of flexibility, so make sure that the conditions you create make sense and work correctly.

Each condition includes a defined function and possible user-defined values. For example, the user must specify at least one value, such as Argentina, when defining a word pair with the seeded If Country Equals condition. If the record being evaluated has Argentina as the Country attribute, then the word replacement occurs.

On the other hand, the seeded End of String condition does not require a user-defined value. If the original word is at the end of a string and the replacement word does not cause the entire string to be null, then the word replacement occurs.

### Procedure

1. Write a custom function with this signature:

```
FUNCTION <custom function>(
    p_input_str      IN  VARCHAR2,
    p_token_str      IN  VARCHAR2,
    p_condition_id   IN  NUMBER,
    p_condition_val  IN  VARCHAR2)
RETURN BOOLEAN;
```

The `tca_eval_condition_rec` function is used for all seeded conditions. Instead of defining a new function, you can use the seeded one and write custom code in the `if/elseif` block for the `condition_id`, as shown in this example:

```
IS
BEGIN
    if condition_id = 1
        get_gbl_condition_rec_value( 'PARTY_SITES', 'COUNTRY' ) =
        'US'
        do this and return true/false ;
    elseif condition_id = 2
        get_gbl_condition_rec_value( 'PARTY_SITES', 'ZIPCODE' ) =
        'xxxxxx'
        do this and return true/false ;
    else
        return true ;
END ;
```

2. Insert a new row in the `HZ_WORD_RPL_CONDS_B` table and populate the columns.
  - **CONDITION\_FUNCTION:** The custom function that you define for the condition.
  - **CONDITION\_VAL\_FORMAT:** How many user-defined values the condition can take. This table provides examples of how the possible column values are used.

CONDITION_VAL_FORMAT Value	Condition	Reason
None	Start of String	Condition does not apply to specific values
Single	Party Type Equals	Condition requires only one party type value
Multiple	In Country	Condition requires at least one country value

**Note:** It is possible to implement a condition that applies to multiple attributes, for example a Party Type Equals and In Country condition. Single attribute conditions, however, are recommended.

## Related Topics

Word Replacements, page 5-9

## Attributes for DQM

Attributes make up the four entities used in DQM: Party, Address, Contact, and Contact Point. Each attribute in the entities is derived from a specific column in one of the TCA Registry tables. These four entities make up the staged schema.

For example, the Party entity in DQM is named HZ\_STAGED\_PARTIES and contains attributes from the TCA Registry tables:

- HZ\_PARTIES
- HZ\_ORGANIZATION\_PROFILES
- HZ\_PERSON\_PROFILES

Examples of attributes in the Party entity include:

- PARTY\_NUMBER from HZ\_PARTIES
- DUNS\_NUMBER from HZ\_ORGANIZATION\_PROFILES
- MARITAL\_STATUS from HZ\_PERSON\_PROFILES

Attributes in the staged schema contain values from the TCA Registry tables that have been transformed into representations that are more alike for the purposes of matching. Attributes, therefore, are used to search for possible matches between an input record and the TCA Registry data.

If needed, you can use up to 30 CUSTOM\_ATTRIBUTE columns in each entity to store additional attributes. See: *Creating Custom Attributes, page 5-18 and Seeded Attributes, Oracle Trading Community Architecture Reference Guide.*

## Related Topics

Defining Attributes and Transformations, page 5-17

Data Quality Management Overview, page 5-1

## Transformations Overview

Your raw party information can include typographical errors, spelling errors, inconsistent formats, and abbreviations due to input errors. For this reason, searches performed on raw values often are inconclusive or miss potential matches.

Transformations transform attribute values in the staged schema so that the values are more similar and useful for the purpose of matching records. Transformations neutralize the effects of data errors on your searches. For example, a transformation that removes all of the double letters in a party name transforms a name such as *Allied Freight* into *Alied Freight*. This transformation makes it easier to match to a party if a typographical error, such as a missing double letter, exists.

After your raw data has been transformed and populated into the staged schema, match rules can use the transformed data to score each record to determine if the record is considered alike enough to be a match to an input value.

DQM includes several standard, or seeded, transformations. You can also develop your own transformations.

## Seeded Transformations

DQM provides several predefined transformations, such as Cleanse and Exact. The Exact transformation accomodates various characters in non-English languages. See: Seeded Transformations, *Oracle Trading Community Architecture Reference Guide*.

For example, the Cleanse transformation performs these actions:

1. Capitalizes all letters.  
*Zannardi-Montoya* is transformed to *ZANNARDI-MONTOYA*.
2. Removes nonalphanumeric characters.  
*ZANNARDI-MONTOYA* is transformed to *ZANNARDI MONTOYA*.
3. Reduces any white space to one space.
4. Removes double letters, retaining only one of the double letters.  
*ZANNARDI MONTOYA* is transformed to *ZANARDI MONTOYA*.
5. Removes vowels except initial vowels.  
*ZANARDI MONTOYA* is transformed to *ZNRD MNTY*.

The final result from the Cleanse transformation is *ZNRD MNTY*. This result would be populated into the staged schema.

All seeded transformations are available in packages. Not all seeded transformations are automatically populated into the staged schema. During the installation of DQM, you can decide if you want to use all of the available transformations.

To ensure that a seeded transformation is populated into the staged schema, you must define the transformation and then run the DQM Staging program. See: Defining Attributes and Transformations, page 5-17 and DQM Staging Program, page 5-42.

## Related Topics

Defining Attributes and Transformations, page 5-17

Creating Custom Transformations, page 5-19

## Defining Attributes and Transformations

Specify the attributes of entities that are used for matching, and assign transformations to each attribute. Only active attribute and transformation combinations that you define in the Define Attributes and Transformations page can be used in the staged schema and in match rules.

You assign transformations to the attributes of each entity used in DQM: Party, Address, Contact, Contact Point. When you define transformations, you must specify which PL/SQL function should be used. Attributes are transformed by their assigned transformations in the staged schema.

**Note:** Seeded attributes and transformations cannot be deleted. You also cannot inactivate the seeded transformations if they are used in seeded match rules. You can, however, activate inactive transformations to use in custom match rules.

**Important:** Before you can use new or updated attributes and transformations, you must generate or update your staged schema. See: DQM Staging Program, page 5-42.

### Attributes

For each attribute, you should enter a user-defined name. Search interfaces that use DQM generally display the user-defined names, not the attribute names, as the search criteria.

If you are defining one of the 30 custom attributes, enter the name of the custom PL/SQL procedure that DQM uses to obtain the custom attribute. See: Creating Custom Attributes, page 5-18.

For address, contact, and contact point attributes, you can optionally denormalize the attribute to the party level. The transformed value would be stored in the HZ\_STAGED\_PARTIES table instead of the staging table for the entity. You should denormalize only attributes that have a limited number of possible values, such as the Country attribute. Denormalization improves performance, but you cannot denormalize all attributes.

To view or update the transformations assigned to an attribute, click Transformation Details for the appropriate attribute to display the transformations below.

### Transformations

To assign a seeded transformation, just enter the transformation name. For custom transformations, you must also enter a description as well as the PL/SQL function that is called to transform the attribute values and to return a formatted result. See: Creating Custom Transformations, page 5-19.

- **Acquisition:** Specify if the attribute and transformation combination can be used in acquisition for match rules with the Search or Expanded Duplicate Identification purpose. The attribute value, as transformed by the transformation, would be indexed with *interMedia* in the staged schema. Indexing improves performance, but too much indexing can also decrease performance.

- Bulk Acquisition:** Specify if the attribute and transformation combination can be used in acquisition for match rules with the Bulk Duplicate Identification purpose. The attribute value, as transformed by the transformation, would be indexed with B-Tree indexes, which are used only for bulk duplicate identification. See: Bulk Duplicate Identification, page 5-7 .
 

**Note:** For performance reasons, select this option only when necessary.
- Active:** To use the transformation, you must activate the transformation for the selected attribute. You cannot inactivate seeded transformations because they are used in seeded match rules.

## Related Topics

- Attributes for DQM, page 5-15
- Transformations Overview, page 5-16
- Attribute and Transformation Tips, page 5-20

## Creating Custom Attributes

You can define custom attributes for the entities used in DQM: Party, Address, Contact, and Contact Point. Up to 30 custom attributes are available in each entity.

### Procedure

- Write a custom procedure that obtains the custom attribute.

When a CUSTOM\_ATTRIBUTE column needs information about a party, address, contact, or contact point, DQM calls a procedure with this signature:

```
FUNCTION <custom_attribute_proc>
  p_record_id      IN      NUMBER,
  p_entity_name    IN      VARCHAR2,
  p_attrib_name    IN      VARCHAR2,
  p_context        IN      VARCHAR2)
RETURN VARCHAR2;
```

- p\_record\_id:** The p\_record\_id value in the signature is the primary key of the table where the CUSTOM\_ATTRIBUTE\_PROCEDURE is defined.

This table displays the appropriate p\_record\_id value for each entity attribute.

Entity Attribute	p_record_id
Party	PARTY_ID
Address	PARTY_SITE_ID
Contact	ORG_CONTACT_ID
Contact Point	ORG_CONTACT_POINT_ID

- p\_context:** The p\_context value, *STAGE* or *SEARCH*, indicates whether the attribute is to be used in the context of staging or searches.

- Define the custom attribute using one of the available CUSTOM ATTRIBUTE values. Enter your custom PL/SQL procedure and define transformations for the attribute. See: Defining Attributes and Transformations, page 5-17.

**Note:** If you do not plan to transform the party information for a custom attribute, then use an Exact transformation.

## Related Topics

Attributes for DQM, page 5-15

## Creating Custom Transformations

You can create transforms to transform any of the TCA Registry attributes in the entities used in DQM: Party, Address, Contact, and Contact Point.

### Procedure

- Create a PL/SQL function for transforming a TCA table column.

Create the transformation in the APPS schema as a PL/SQL function that conforms to the following standard signature:

```
FUNCTION <transformation_function_name>
  p_original_value      IN      <ATTRIBUTE_DATATYPE>
  p_language            IN      VARCHAR2 ,
  p_attribute_name     IN      VARCHAR2 ,
  p_entity_name        IN      VARCHAR2 ,
  p_context            IN      VARCHAR2 DEFAULT NULL)
RETURN VARCHAR2;
```

- p\_original\_value:** The data type of the parameter p\_original\_value depends on the data type of the attribute that the parameter is transforming. The return value, however, must be VARCHAR2.

This table shows an example of p\_original\_value data types for different attributes.

Attribute Name	Attribute Code	Data Type of p_original_value
Party Name	PARTY_NAME	VARCHAR2
Person Name	PERSON_NAME	VARCHAR2
Last Update Date	LAST_UPDATE_DATE	DATE
Date of Birth	DATE_OF_BIRTH	DATE

- p\_language:** You must include this parameter, but cannot use it.
- p\_context\_value:** The p\_context value, *STAGE* or *SEARCH*, indicates whether the transformation is to be used in the context of staging or searches.

You can use any PL/SQL procedure that adheres to the above signature as a transformation.

2. Assign your custom PL/SQL function to a transformation. To use the transformation, you must also assign the transformation to at least one attribute. See: Defining Attributes and Transformations, page 5-17.

## Related Topics

Transformations Overview, page 5-16

## Attribute and Transformation Tips

When you create and use transformations, consider these issues:

- Design and create as many attributes and transformations as possible before populating or updating the staged schema.

After defining any new transformations for any attribute, you must run the DQM Staging program to generate or update the staged schema. Processing the staged schema can require significant computing resources and time. If you are uncertain about initially adding a transformation or an attribute with the initial group of transformations and attributes, the best strategy is to add the transformation.

- Do not transform lookups. Lookups have a predetermined or known set of values, so you cannot transform them.
- Remember that word replacements are called within a transformation.
- Consider the possibility that your party information might contain compound names that were entered with the modifier following a comma.

For example, *The New Datsonville* could have been entered into your party information as *Datsonville, The New*. You can create a transformation that reverses the text before and after the comma in any city name.

- If the Domain attribute has only domain values, use the Core Domain Extraction transformation. If the attribute has e-mail addresses, use either the Core Domain Extraction or Full Domain extraction transformation.

You can modify or add codes to the:

- E-Mail Domain Suffixes (HZ\_DOMAIN\_SUFFIX\_LIST) lookup type, which the Core Domain Extraction transformation uses to identify core domains.
- ISP E-Mail Domains (HZ\_DOMAIN\_ISP\_LIST) lookup type, which both transformations use to remove ISP e-mail domains from the matching process.

The transformation compares against the code, not lookup meaning or description.

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

**Important:** Before you can use new or updated lookups, you must generate or update your staged schema. See: DQM Staging Program, page 5-42.

## Match Rules Overview

Match rules determine whether two records should be identified as a match. A match rule has one of these purposes:

- **Search:** Mainly for search user interfaces, but also for duplicate prevention.

- **Bulk Duplicate Identification:** For identifying duplicates for a large number of records at one time, using simple logic for fast processing.
- **Expanded Duplicate Identification:** For identifying or preventing duplicates, using more precise and complex logic than Bulk Duplicate Identification.

A match rule can be of type:

- **Single:** Contains a single match rule.
- **Set:** Contains multiple match rules and conditions to determine which rule in the set to use. All rules in a set have the same purpose, either Search or Expanded Duplicate Identification.

Match rule sets are particularly useful for country-specific processes or entities. For example, countries use different address attributes. You can define a set that has match rules with different address attributes. The conditions would determine which match rule to use, based on the country attribute.

Match rules support score-based matching and consist of two parts, acquisition and scoring. Acquisition provides an initial set of possible matches, and scoring assigns scores to attributes to further filter matches and rank the results.

Scores for records found by match rules with Search purpose are displayed as match percentages in the search results. That percentage is the record score divided by the highest possible score, which would mean a perfect match to the search criteria.

**Note:** The match percentages of search results can be further adjusted for quality, if quality adjusted matching is set up. See: Quality Adjusted Search Results, page 5-37.

For your business needs, you do not need to use all of the functions of match rules.

- For the simplest type of matching, use only acquisition.
- For ranking your results, use scoring.
- For filtering results based on the scores, use thresholds.

When you define match rules, you can specify which attributes are important for matching and configure how the attributes should be evaluated. For each attribute that you use in a match rule, you also assign one or more transformations.

For example, you can define a match rule so that only records with the same transformed party name and party number attribute values are considered matches. You can also determine how matching or similar attributes are scored to produce a total score that you can use to evaluate a record.

Aside from letting you create new custom match rules, DQM provides seeded match rules. See: Seeded Match Rules, *Oracle Trading Community Architecture Reference Guide*.

You can copy and modify match rules to meet your specific requirements, or to test variations of an existing custom match rule before you improve or modify the original rule. See: Defining Single Match Rules, page 5-25 and Defining Match Rule Sets, page 5-36.

## Compiling Match Rules

After you initially install DQM, you must compile all the seeded match rules before you can use them, even if just to use them for copying. You also need to compile match rules that you create, update, or copy.

- **Compiled:** PL/SQL code for the match rule has been generated. The match rule is locked against changes, but available for use. The lock ensures that the match rule and its compiled PL/SQL code are always synchronized.
- **Uncompiled:** Match rule is previously saved, but now unlocked. An uncompiled match rule cannot be used until it is compiled.

You can use the Match Rules page to compile individual or all match rules, or run the DQM Compile All Rules program to compile all rules. See: DQM Compile All Rules Program, page 5-37.

**Tip:** Compile match rules outside of your organization's operational business hours, or at times when no DQM logic is used. Match rules cannot be compiled when DQM is being used for any process, for example to search for records or identify duplicates.

Before you can compile any match rule, make sure that the staged schema is generated, or run the DQM Staging program. See: DQM Staging Program, page 5-42.

**Note:** You cannot change a match rule's purpose after the match rule has been compiled at least once.

## Deleting Match Rules

Use the Match Rules page to delete any compiled, custom match rules. Before deleting a match rule, you should make sure that it is not used anywhere. If the rule is in use, replace it with another match rule or consider the consequences of deleting the rule.

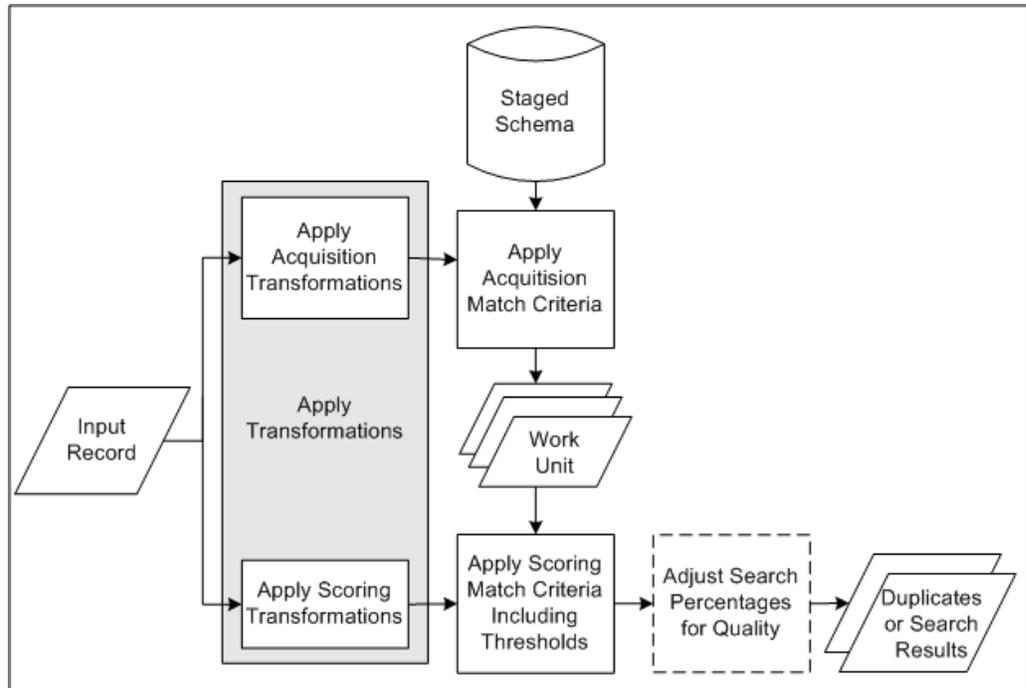
## Related Topics

The Matching Process, page 5-22

Data Quality Management Overview, page 5- 1

## The Matching Process

This diagram describes the DQM matching process.



1. The staged schema stores the transformed TCA Registry attribute values for comparison in the matching process. The included attributes and the transformations applied to each are defined in the Define Attributes and Transformations page.
2. Input records come in when you enter or search for party information, or run a duplicate identification process.
3. Transformations from the acquisition and scoring phases of the match rule transform the input record, one entity at a time, for the attributes defined in the match rule.
4. The attribute values in the input record that are transformed by the acquisition transformations in the match rule are compared against the attribute values in the staged schema.

Matched acquisition attribute values determine the most relevant subset of records from the staged schema to form the work unit.

5. The work unit consists of all records from the staged schema with attribute values that match the transformed acquisition attribute values of the input record.

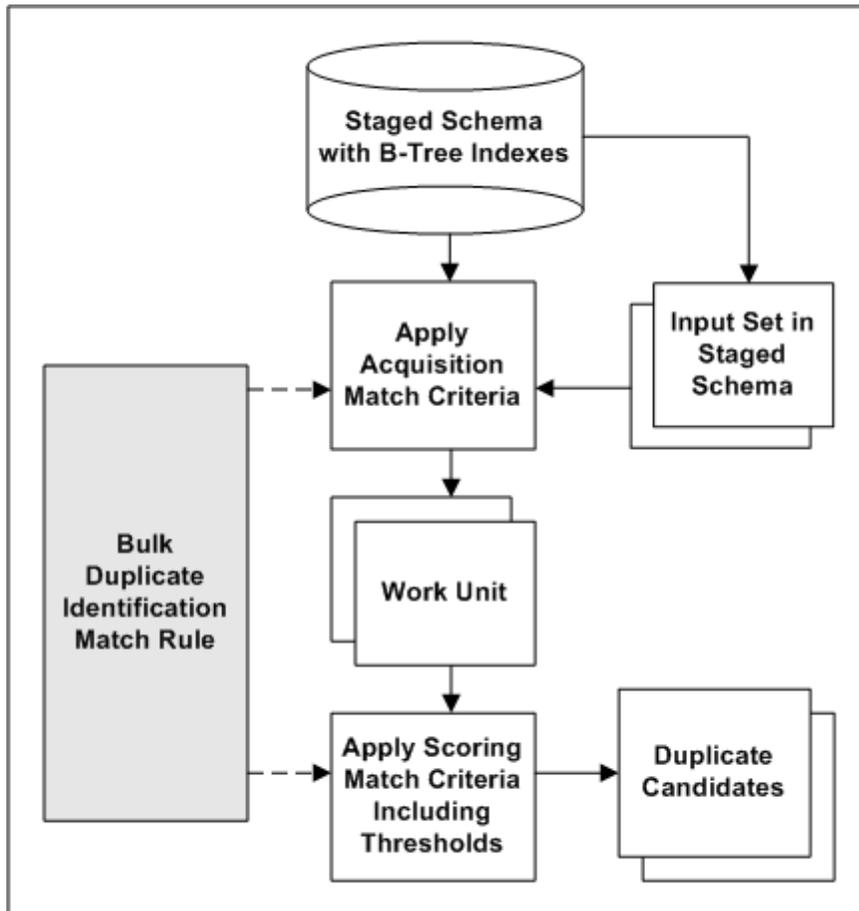
The work unit saves you time and resources because this relevant subset of records, not the entire staged schema, can be compared against the input record for scoring.

6. The attribute values in the input record that are transformed by the scoring transformations in the match rule are compared against the attribute values in the work unit. Based on the match rule, a score is calculated for each record in the work unit.
7. Steps 3 through 6 are repeated for each entity.
8. Scores from all entities are added together for each record.
9. The score of each work unit record is compared against the match, override, and automatic merge thresholds defined in the match rule.

- Records with scores that reach the match threshold are selected as matches for the input record.
  - Records with scores that also reach the automatic merge threshold are automatically merged if Automerge is implemented and the match rule is designated for use with Automerge.
  - The input record can be prevented from entering the TCA Registry if a duplicate is found with a score that reaches the override threshold.
10. The records' match percentages are adjusted for quality if:
- Quality adjustment logic is created and enabled.
  - The matching process is for search, using a match rule with Search purpose.
  - The record's final score, as the match rule determines, reaches the match threshold.

### Bulk Duplicate Identification Matching Process

This diagram describes the bulk duplicate identification process.



1. The staged schema stores the transformed TCA Registry attribute values for comparison in the matching process. The included attributes and the transformations applied to each are defined in the Define Attributes and Transformations page.

Also defined are the attribute and transformation combinations to be used for bulk duplicate identification. The staged schema includes B-Tree indexes only for the transformed attributes marked for bulk duplicate identification.

2. A duplicate identification process is started, either for a subset of records in the TCA Registry or for the entire Registry. The transformed version of that set of input records is already represented in the staged schema.
3. With the Bulk Duplicate Identification purpose, the match rule specified for the duplicate identification is applied to the staged schema, which is joined with the input set for bulk comparison.
  1. Using the acquisition criteria in the match rule, each record in the input set is compared to all other records in the same staged table.

For example, an acquisition criterion is the DUNS Number attribute with the Exact transformation. All DUNS Numbers, as transformed by the Exact transformation, would be compared against one another.
  2. Matched acquisition attribute values determine the most relevant subset of records from the staged schema to form the work unit.
  3. Using the scoring criteria in the match rule, each record in the work unit is compared to all other work unit records in the same staged table.
  4. A score is calculated for each record in the work unit, and scores for all entities are added together for determining duplicate parties.
4. The score of each work unit record is compared against the match and automatic merge thresholds defined in the match rule.
  - Records with scores above the match threshold are selected as potential duplicates.
  - Records with scores that also exceed the automatic merge threshold are automatically merged, if Automerge is implemented and the match rule is designated for use with Automerge.

See: Bulk Duplicate Identification, page 5-7 .

## Related Topics

Match Rules Overview, page 5-20

Quality Adjusted Search Results, page 5-37

## Defining Single Match Rules

You define a match rule when you create a custom rule, update an existing custom rule, or copy a compiled seeded or custom rule. You cannot update a seeded match rule or copy an uncompiled rule.

## Procedure

1. Enter the basic information for the match rule, including its name and purpose.

**Note:** You cannot change a match rule's purpose after the match rule has been compiled at least once.

You also specify:

- For the search operator if a record must match any or all acquisition attributes to be considered a match.

Even if you select Match Any, a record still must match all acquisition attributes within the same entity, except Party. For example, for acquisition, you have only the Party Name and DUNS Number attributes from the Party entity, and City and State from the Address entity. If a record matches only DUNS Number, it is considered a match. If it matches only State, it is not considered a match. Because City is also from the Address entity, the record would need to match both City and State.

- Whether the match rule can be used for Automerge. See: Automerge, page 5-52.

**Caution:** You cannot undo automatic merges. For Automerge, use only match rules that provide exact matches.

2. Select attributes for the match rule, either acquisition, scoring, or both, page 5-26.
3. Define the usage of the attributes, page 5-26.
4. Assign scores, transformations, and thresholds, and submit the match rule, page 5-28.
5. Compile the match rule, page 5-22.

## Related Topics

Match Rules Overview, page 5-20

Match Rule Example, page 5-31

## Selecting Attributes and Defining Usage

When you select attributes, from the Party, Address, Contact, and Contact Point entities, you should select attributes that help you obtain all relevant matches. For example, if you want to find records that have matching names, include the Party Name attribute in the match rule.

**Note:** Only defined attributes are available for you to select. See: Defining Attributes and Transformations, page 5-17.

After you select attributes from any of the four entities for the match rule, you must define the usage of the attribute in the rule.

- **Acquisition:** Used for comparing an input record to the records in the staged schema, to obtain an initial set of matched records. This table describes how an attribute must be marked to be available for acquisition, depending on the match rule purpose. See: Defining Attributes and Transformations, page 5-17.

Match Rule Purpose	Available for Acquisition
Search	Expanded Match
Expanded Duplicate Identification	Expanded Match
Bulk Duplicate Identification	Bulk Duplicate Identification

If you specify more than one acquisition attribute in the match rule, the search operator that you defined for the match rule determines whether all or any attribute must match to determine if the input record is a match to a record in the staged schema. See: *Defining Single Match Rules*, page 5-25.

Do not be too restrictive with your acquisition if you want fairly loose matches. For example, if you use the Address, City, and State attributes for acquisition, with the Match All search operator, then a record must have the same combination of address, city, and state to match. If you use just City and State, however, you will have more potential matches, and can still use address as a match criterion by including Address as a scoring attribute.

**Note:** If you are defining a match rule with the Search purpose, the acquisition and scoring attributes determine the search criteria that appear in the user interface. The actual prompt that appears for each criterion is the user defined name. See: *Defining Attributes and Transformations*, page 5-17.

The initial set of matched records obtained by acquisition is called the work unit. A work unit includes all records with acquisition attribute values, transformed using the transformations, that match attribute values of the input record. The work unit can be the final set of matches or used for scoring.

If you only want to consider this initial set of matched records, you do not have to define scoring attributes and specify thresholds or scores. You would have a match rule that requires that a record matches any or all acquisition attributes you have selected.

- **Filter:** Used in acquisition so that the attribute must be a match in the work unit. The search engine groups filter attributes of the same entity under a match-all condition, even the Party entity.

**Note:** If the attribute’s type is Lookup, then the DQM search engine defaults that attribute as a filter because the values of the attribute are usually not unique across records.

For example, this table displays a set of acquisition attributes:

Attribute Name	Entity	Type	Filter	Default as Filter
Party Name	Party		Yes	No
DUNS Number	Party		Yes	No
CEO Name	Party		No	No
Address 1	Address		No	No
Country	Address	Lookup	Yes	Yes
Phone Number	Contact Point		No	No

If the match rule's search operator is Match Any, then all of the returned records will match either of the following criteria:

- Party Name and DUNS Number
- Address 1 and Country

Even though the search operator is Match Any, and Address 1 is not a filter, all acquisition attributes within the same entity, other than Party, must be a match. In this case, because they are filters within the same entity, party attributes Party Name and DUNS Number both also must match. See: Defining Single Match Rules, page 5-25.

**Note:** Attributes used as filters are only used in acquisition, not scoring, because all records must contain these filter attributes.

- **Scoring:** Used to score the records in the work unit. With the scoring component of a match rule, records that do not exactly match the values of the acquisition attributes values can still be considered a match.

**Note:** Scoring attributes do not have to be the same as the acquisition attributes, and you can use more attributes for scoring. For best results with match rules with the Search purpose, however, use the same attributes for both acquisition and scoring.

You must have acquisition attributes from each entity that has scoring attributes in the same match rule. For example, if you have scoring attributes from the Party and Contact Point entities, you must also have acquisition attributes from those two entities, even if not the exact same attributes.

For match rules with the Search purpose, if you decide to specify the order in which attributes appear as search criteria, assign an number to every attribute. Use positive integers greater than 0, and attributes are displayed in the assigned ascending order. The numbering does not have to be gapless, and all attributes without a number are displayed last.

After you select attributes and their usage, assign transformations and optionally scores and thresholds. See: Assigning Scores, Transformations, and Thresholds, page 5-28.

## Related Topics

Defining Single Match Rules, page 5-25

## Assigning Scores, Transformations, and Thresholds

Define the scores and weights used to calculate the match score for each record in the work unit. The match score for the entire record is the sum of the actual weighted attribute scores. This match score is the value that is compared to the match rule thresholds.

You can save the match rule definition and compile it later. A new or updated match rule cannot be used until it is compiled. See: Compiling Match Rules, page 5-22.

## Attribute Scores

You rank your scoring attributes in order of importance by assigning scores in the form of integers. Assign the highest score to the attribute that you consider the most

important for a match. The score is awarded to a record if the attribute is evaluated as a match. If the attribute does not match, then a score of zero is assigned.

This score is then multiplied by the weight percentage of the attribute, if any, to determine the final weighted attribute score that counts toward the match score of the record.

Scores for records found by match rules with the Search purpose are displayed as match percentages in the search results. That percentage is the record score divided by the highest possible score, which would mean a perfect match to the search criteria.

**Note:** The match percentages of search results can be further adjusted for quality, if quality adjusted matching is set up. See: Quality Adjusted Search Results, page 5-37.

## Transformations

You must assign at least one transformation for each acquisition, filter, and scoring attribute. DQM applies the selected transformations to that attribute before the input record is compared to the record in the work unit. You can choose more than one transformation for each of the attributes in the match rule.

For acquisition, you can only select transformations that are marked with the corresponding attribute for acquisition. This table describes how the transformation must be marked with the attribute to be available for acquisition, depending on the match rule purpose. See: Defining Attributes and Transformations, page 5-17.

Match Rule Purpose	Available for Acquisition
Search	Expanded Match
Expanded Duplicate Identification	Expanded Match
Bulk Duplicate Identification	Bulk Duplicate Identification

Use the fewest transformations possible in your match rule. Using more transformations than necessary could affect the time required for staging and the performance of your search.

## Scoring Attributes

For scoring attributes, you can optionally assign weights and similarity matching.

- **Weight:** Assign percentage weights to the transformations depending on how similar the transformed value of the attribute would be to the original values of the attribute. For example, you should assign more weight to the Exact transformation than to the Cleanse transformation because Exact makes fewer changes to the original data.

If a transformed attribute value is a match, the weight is multiplied by the attribute score to determine the weighted score of the attribute. If an attribute is assigned more than one transformation, the highest weighted score is awarded to the record for the attribute.

For example, you assign the Party Type scoring attribute a score of 50, and assign the transformations Exact and Cleanse to that attribute. You give Exact a 80% weight and Cleanse 50%. If the Party Type attribute is a match with both transformations, the attribute's weighted score would be 40.

- **Similarity:** The Similarity matching option does not require an exact match, letting you create fuzzier matches by applying the similarity algorithm to transformed attribute values. The similarity algorithm compensates for unanticipated errors that the transformations do not catch.

The algorithm compares the transformed attribute value of the input record to the corresponding attribute value from the work unit record and assigns a percentage for the extent of similarity. This similarity percentage is the edit distance between two strings, or groups of text, computed as follows:

1. Determine the edit distance, or the number of changes required to make the longer string match the shorter string.

For example, for Smythe and Smith, the edit distance is two.

2. Subtract the edit distance from the number of characters in the longest string.

Following the example above:  $6 - 2 = 4$ .

3. Divide the amount calculated in step 2 by the number of characters in the longest string.

Continuing the example:  $4/6 = 0.6666$

4. Express the result as an integer.

In this example the result would be a similarity score of 67.

If two strings are identical, then the similarity percentage equals 100. If no characters in the two strings are the same, then the similarity percentage is zero.

If the computed percentage is greater than or equal to the similarity percentage that you define in the match rule, the attribute is considered a match. If you select the Similarity option, you must enter this similarity percentage.

**Note:** The Similarity option requires additional computing resources and time.

## Thresholds

DQM calculates a weighted score for the entire record, based on attribute scores and weight percentages, and then compares that score against the match rule thresholds to evaluate the record in the work unit.

**Note:** If you specify thresholds in your match rules, be sure that:

- You do not set any thresholds too low. Low thresholds might let combinations of attributes pass as matches that are not significant or relevant to your search.
  - Each threshold is less than the sum of the possible scores of all attributes.
- **Match threshold**
    - For match rules with the Expanded or Bulk Duplicate Identification purpose, a record with a score equal to or above the match threshold is considered a match to the input record.

To compute what you should enter as the match threshold, determine the minimum set of attributes required for a match. The total of the attribute scores of this minimum set is the maximum value of the match threshold.

- For match rules with the Search purpose, the record's score is divided by the total possible score to get a percentage. A record with a percentage equal to or above the match threshold percentage is considered a match to the input record.

For example, you enter 75 as the match threshold percentage for a match rule with the Search type. The highest possible score that any record can get based on this match rule is 500. If a record gets a score of 250, it is not considered a match because 50% is less than the 75% match threshold.

**Note:** A record must reach the match threshold to not only be considered a search result, but also have its match percentage adjusted for quality, if quality adjusted matching is set up. See: Quality Adjusted Search Results, page 5-37.

- **Override threshold:** A record with a score equal to or above the override threshold can be prevented from entering the TCA Registry, because it is considered to be a match or duplicate of an existing record.

To compute the override threshold, determine the minimum set of attributes required for two parties to match when a new record is being created. The total of the attribute scores of this minimum set is the maximum value for the override threshold.

The override threshold must be more than or equal to the match threshold.

- **Automatic merge threshold:** A record with a score equal to or above the automatic merge threshold is marked by default as a candidate for merge without manual intervention. The record will be automatically merged if Automerge is implemented. You can enter this threshold only if the match rule is allowed for Automerge. See: Defining Single Match Rules, page 5-25.

To compute the automatic merge threshold, determine the minimum set of attributes required for considering two parties for merge. The total of the attribute scores of this minimum set is the maximum value for the automatic merge threshold.

The automatic merge threshold must be more than or equal to the match threshold.

**Caution:** You cannot unmerge records that are automatically merged. Set the automatic merge threshold high enough to prevent merging records that are not definite duplicates.

## Related Topics

Defining Single Match Rules, page 5-25

## Match Rule Example

This section provides an example of how you can develop a match rule. This example focuses on the scoring and threshold components, detailing the thought process you might take to create an effective match rule.

### Preparing for the Match Rule

1. Create a list of all of the attributes that should match between two matching records. This list should include attributes that are really important as well as attributes that are just good to have as matches.

For this example, this table shows the following list of attributes:

Attribute Name	Entity	Type
Party Name	Party	
Phone Number	Contact Point	
Address1	Address	
Country	Address	Lookup
Postal Code	Address	
Contact Last Name	Address	

2. Rank the order of importance of the attributes, as shown in this table:

Rank	Attribute Name	Entity	Type
1	Party Name	Party	
2	Phone Number	Contact Point	
3	Contact Last Name	Contact	
4	Address1	Address	
5	Country	Address	Lookup
6	Postal Code	Address	

This ranking indicates that the attribute score you assign to party name is the highest and the scores are lower or stay the same as you go down the ranking.

3. Identify the minimum sets of attributes you require to match for records to be considered matches, for example:
- Only the party name
  - Only the phone number
- This requirement indicates that your acquisition attributes should at least include party name and phone number and that you should select the Match Any search operator.
4. Identify the sets of attributes that by themselves are not good enough to indicate that you have matching records, but which, if they were close enough matches, might give additional credence to a match on the minimum set of party name and phone number.
- Only address
  - Only country
  - Only postal code

- Only address and country
- Only address and postal code
- Only country and postal code
- Only contact last name

This selection determines the attributes that you need to include as scoring attributes.

### Selecting Attributes and Assigning Scores

1. You should select the Match Any search operator because you have two sets in step 3 of Preparing for the Match Rule.
2. Choose attributes from step 1 of Preparing for the Match Rule that would get you all of the possible matches. You must include the attributes from step 3 of Preparing for the Match Rule. For this example, you select:
  - Party Name
  - Phone Number
  - Contact Last Name
3. Select attributes from step 1 of Preparing for the Match Rule that you want to use to score the records. You must include the attributes from step 4 of Preparing for the Match Rule.

This table shows the scoring attributes.

Attribute Name	Entity	Type
Party Name	Party	
Phone Number	Contact Point	
Address1	Address	
Country	Address	Lookup
Postal Code	Address	
Contact Last Name	Contact	

4. Assign scores to the scoring attributes following the ranking in step 2 of Preparing for the Match Rule. The most important attributes receive the highest scores. For this example, the score assignments should reflect the following:
  - Matches on party name provide the best match results, so you assign the highest score to party name.
  - Matches on a phone number might be the second best matching criterion, so you assign the next highest score to phone number.
  - Combinations of the address components and contact last name are the third best, so you assign scores by relative importance.
  - The contact last name attribute is estimated to have about the same value as the address1 attribute.

For this example, the scores in this table are assigned to the scoring attributes.

Scoring Attributes	Scores
Party Name	40
Phone Number	30
Address1	15
Country	10
Postal Code	10
Contact Last Name	15

The total score for the attributes in this table is 120.

### Setting the Match Threshold

1. Obtain minimum sets from step 3 of Preparing for the Match Rule and total attribute scores from step 4 of Selecting Attributes and Assigning Scores.
  - For Party Name the total attribute score is 40.
  - For Phone Number the total attribute score is 30.
2. Set your match threshold based on the lower score of the two minimum sets, in this example, 30.

With the match threshold at 30, you can interpret scoring as follows:

- If only the phone number is a match, the record is a match because the score equals the match threshold of 30.
- If only the party name is a match, then the record is a match because the score exceeds the match threshold of 30.
- If the country, postal code, and contact last name are a match, then the record is a match because the attributes' combined score of 35 exceeds the match threshold of 30.
- If the address1, country, and postal code are a match, then the record is a match because the attributes' combined score is 35, which exceeds the match threshold of 30.

With the match threshold at 30, this table shows results of possible matches:

Possible Matches	Cumulative Score	Match
Party Name	40	Yes
Phone Number	30	Yes
County, Postal Code, and Contact Last Name	35	Yes
Address1, Country, and Postal Code	35	Yes
Party Name and Phone Number	70	Yes
Phone Number and Country	40	Yes
Address1 and Country	25	No
Country and Postal Code	20	No
Party Name, Address1, and Contact Last Name	70	Yes

### Considering the Impact of Transformations on Your Thresholds

If you have transformation weights other than 100%, then you might need to tune your threshold. With weights other than 100%, the total score for the record can be lower than the match threshold that you assigned. The total score is the sum of attribute scores that are multiplied by the weight.

For example, a minimum set of attributes required for match consists of party name. The following table shows the transformations and weights assigned to the Party Name attribute, as well as the weighted attribute scores calculated for each transformation.

#### Party Name Attribute with Attribute Score 40

Transformation	Weight %	Weighted Attribute Score Calculation
Exact	100	100% * 40 = 40
Reverse	80	80% * 40 = 32
Cleanse	50	50% * 40 = 20

Depending on the transformations, a matching party name can have a weighted attribute score below 40. With a weighted score of 20, for example, this minimum set might not exceed the match threshold of 30. If you want all possible matches that originate from any of the transformations, you might want to adjust some of your values.

You have three options:

1. Decrease the match threshold to the lowest possible weighted attribute score. Performing this option might affect the scores of other attributes and thresholds.

2. Increase the weight of the transformations so that the lowest possible weighted attribute score exceeds the match threshold. This option might not always be possible because weights must be less than or equal to 100.
3. Increase the attribute score so that the lowest possible weighted attribute score exceeds the match threshold.

For example, you can increase the Party Name attribute score to 60 and the Cleanse transformation weight to 70%. This table shows the adjusted assignments with each possible weighted attribute score exceeding the match threshold of 30.

**Party Name Attribute with Attribute Score 60**

Transformation	Weight %	Weighted Attribute Score
Exact	100	60
Reverse	80	48
Cleanse	70	42

## Defining Match Rule Sets

You define a match rule set when you create a set, as well as update or copy an existing set.

### Procedure

1. Enter the basic information for the match rule set, including its name and the purpose of all match rules in the set. The Bulk Duplicate Identification purpose is not used in match rule sets because bulk duplicate identification processes in bulk. For match rule sets to function effectively, the records must be processed row by row.

**Note:** After a set is first created and compiled, you cannot change the purpose when you later update or copy the match rule set.

2. Specify a fallback match rule, at least one match rule to include in the set, and the conditions under which to use each match rule. All combinations of the condition components must be unique.

**Note:** If a match rule set with Search purpose is used to render search UI, then the superset of all attributes in the set is the displayed search criteria.

For example, to run a match rule for Australian addresses, you define the condition as:

- **Entity:** Address
- **Attribute:** Country
- **Operation:** Equals
- **Value:** Australia

**Note:** The value is not case sensitive.

3. Define the order in which the match rule set conditions are evaluated. The first condition to be met determines which match rule runs.

You can save the match rule set definition and compile it later. A new or updated match rule set cannot be used until it is compiled. See: [Compiling Match Rules](#), page 5-22.

## Related Topics

[Match Rules Overview](#), page 5-20

## DQM Compile All Rules Program

Use the DQM Compile All Rules program when you initially install DQM to compile the seeded match rules provided by TCA. You can also use this program to compile all of the match rules that you create or update.

You can compile selected match rules in the Match Rules page, while this program always compiles all rules. The program attempts to compile all match rules even if certain match rules fail to compile. Match rules that are already compiled remain compiled, and match rules that can be successfully compiled are compiled. Match rules that fail to compile are left uncompiled.

You can see the compile status of each match rule in the Match Rules page.

## Prerequisites

Before you can compile your match rules, you must run the DQM Staging program. For more information, see: [DQM Staging Program](#), page 5-42.

## Related Topics

[Compiling Match Rules](#), page 5-22

## Quality Adjusted Search Results

The Quality Adjusted Search Results feature takes a record's match percentage, as determined by a match rule, and adjusts it based on what you define as quality. This feature applies only to searches, or matching processes using match rules of type Search, and only to records with scores that reach the match rule's match threshold. You get search results that are based on both similarity to search criteria and quality, sorted by the quality adjusted match percentage.

If the HZ: Enable Quality Weighting for DQM Match Scores profile option is set to *Yes*, then DQM applies two user hook procedures to search results that reach the match threshold. The first procedure determines the quality weighting, or the percentage of the final adjusted match percentage that should be based on quality. The second determines the quality score, which represents the user-defined quality of a record, with 100 as the highest possible.

To set up, you must:

- Set the HZ: Enable Quality Weighting for DQM Match Scores profile option to *Yes*. See: [Data Quality Management Profile Options](#), page B- 8 .

- Create two user hook procedures for determining quality weighting and quality scores. See: Creating Logic for Quality Adjusted Search Results, page 5-39.

**Example**

This table shows the records that a match rule has identified as search results, with the match percentages that the match rule has calculated.

Record	Match Percentage
A	70%
B	67%
C	65%
D	62%

The first user hook procedure determines that the quality weighting is 20%, and the second procedure calculates the quality scores as shown in this table.

Record	Match Percentage	Quality Score
A	70%	50
B	67%	20
C	65%	60
D	62%	80

If 20% of the final adjusted match percentage is from the quality score, then 80% is from the original match percentage. The match percentage must be adjusted to be out of 80%, not 100%. This adjustment, for the weighted match percentage, is calculated as:

$$\text{Weighted Match Percentage} = \text{Match Percentage} * (100 - \text{Quality Weighting}) / 100$$

The quality score must also be adjusted based on the quality weighting of 20%. The weighted quality percentage is calculated as:

$$\text{Weighted Quality Percentage} = \text{Quality Score} * \text{Quality Weighting} / 100$$

This table shows the weighted match percentages and weighted quality percentages, with quality weighting of 20%.

Record	Match Percentage	Weighted Match Percentage	Quality Score	Weighted Quality Percentage
A	70%	56%	50	10%
B	67%	53.6%	20	4%
C	65%	52%	60	12%
D	62%	49.6%	80	16%

The final quality adjusted match percentage is calculated by adding the weighted match percentage and the weighted quality percentage. This table shows the search results, sorted by the quality adjusted percentages.

Record	Weighted Match Percentage	Weighted Quality Percentage	Quality Adjusted Match Percentage
A	56%	10%	66%
D	49.6%	16%	65.6%
C	52%	12%	64%
B	53.6%	4%	57.6%

Note how the order of the records have changed when quality is taken into account.

## Creating Logic for Quality Adjusted Search Results

For the logic to use in calculating quality adjusted search results, you must write two user hook procedures for the HZ\_DQM\_QUALITY\_UH\_PKG package: `get_quality_weighting` and `get_quality_score`. These procedures let you implement the logic to use, according to your organization's needs and definitions of quality.

The template code for the HZ\_DQM\_QUALITY\_UH\_PKG package is present in the file `$AR_TOP/patch/115/sql/ARHDQUHB.pls`, which has dummy implementations for the user hook procedures. Copy this file and provide actual implementations for the quality weighting and scoring procedures.

### get\_quality\_weighting

- **Input:** The ID of the match rule used for the search
- **Output:** A number that represents the quality weighting for calculating the quality adjusted match percentage, based on the input match rule

In the `get_quality_weighting` procedure, include all the possible search match rules that are used for quality adjusted search results. You can assign different quality weighting to the match rules.

#### Example

```
FUNCTION get_quality_weighting(p_match_rule_id IN NUMBER)
RETURN NUMBER IS
  l_quality_weighting NUMBER := 0;
BEGIN
  IF (p_match_rule_id = 8) THEN
    l_quality_weighting := 20;
  ELSIF (p_match_rule_id = 10) THEN
    l_quality_weighting := 25;
  END IF;
RETURN l_quality_weighting;
EXCEPTION
  WHEN OTHERS THEN
    RAISE;
END get_quality_weighting;
```

For example, a search is run using the match rule with the ID of 10. The `get_quality_weighting` procedure would determine that 25% of the quality adjusted match percentage is based on the quality score. The remaining 75% is based on the original match percentage.

## `get_quality_score`

- **Input:** An entire record, including all the column values from the `HZ_PARTIES` table, and the ID of the match rule used for the search
- **Output:** A number that represents the quality score for the input record, indicating its quality level, with 100 as the highest

In the `get_quality_score` procedure, include all the possible search match rules that are used for quality adjusted search results. The logic in this procedure can be as simple or complex as you need. You can base the logic only on record values passed to the procedure, for example the certification level or whether a DUNS Number exists or not. For a more complex approach, you can instead take the passed values and use them to join to any number of tables to determine quality, or to call other procedures, APIs, programs, and so on.

**Caution:** The more complex the procedure, the more the performance might be negatively affected.

### Example

```
FUNCTION get_quality_score(p_match_rule_id IN NUMBER, p_hz_party_
rec IN HZ_PARTIES%ROWTYPE)
RETURN NUMBER IS
    l_quality_score NUMBER := 0;
BEGIN
    IF (p_match_rule_id = 8) THEN
        IF p_hz_party_rec.duns_number IS NOT NULL THEN
            l_quality_score := 50;
        END IF;
    ELSIF (p_match_rule_id = 10) THEN
        IF p_hz_party_rec.duns_number IS NOT NULL THEN
            l_quality_score := 35;
        END IF;
    END IF;
RETURN l_quality_score;
EXCEPTION
    WHEN OTHERS THEN
        RAISE;
END get_quality_score;
```

For example, a search is run using the match rule with the ID of 10, and the record that is evaluated has a DUNS Number. The `get_quality_score` procedure would assign this record a score of 75.

## Related Topics

Quality Adjusted Search Results, page 5-37

## Staged Schema

The staged schema is a separate set of database tables with a portion of the data from the TCA Registry that transformations have standardized for improved matching. During

matching, the input record is compared against the records in the staged schema instead of the original Registry. To enable efficient searches, the staged schema is indexed using Oracle *interMedia* and B-Tree indexes. DQM searches against the indexes to take advantage of high performance capabilities in searching through large quantities of data.

## Staged Schema Features

Each table in the staged schema contains attribute values for each entity: Party, Address, Contact, and Contact Point, and can include up to 30 custom attributes. In the Define Attributes and Transformations page, you define the attributes that you want in the staged schema as well as the transformations to apply to each attribute value. See: Defining Attributes and Transformations, page 5-17.

For example, for the Party entity, you can include the party name attribute and specify two transformations to transform the party names. Each attribute, in essence, corresponds to a column in a TCA Registry table that stores the attribute value, and the staged schema contains the transformed version of those values.

This table shows the mapping of the TCA Registry to the staged schema:

Entity	TCA Registry Table	Staged Schema Table
Party	HZ_PARTIES	HZ_STAGED_PARTIES
Address	HZ_PARTY_SITES	HZ_STAGED_PARTY_SITES
Contact	HZ_CONTACTS	HZ_STAGED_CONTACTS
Contact point	HZ_CONTACT_POINTS	HZ_STAGED_CONTACT_POINTS

See: Seeded Attributes, *Oracle Trading Community Architecture Reference Guide*.

Data Quality Management provides programs that you run to:

- Create and update the staged schema. See: DQM Staging Program, page 5-42.
- Synchronize the staged schema with the TCA Registry. See: DQM Synchronization Program, page 5-45.

When information is added to or updated in the TCA Registry through a user interface or TCA Bulk import, an Oracle Workflow listener starts the automatic synchronization of the staged schema with the Registry. This near real-time process ensures accurate DQM searches. For example, after you enter a new address, a subsequent DQM search for addresses can include that record in the search.

The automatic synchronization works only if the Workflow Agent Listener is periodically running. See: Implementing Automatic Synchronization of Staged Schema, page 5-46.

## *interMedia* Index Features

*interMedia* indexes speed up the acquisition phase of the matching process by quickly limiting the number of parties to evaluate for scoring. *interMedia* indexes are built using inverted indexes, a structure that differs from normal indexes. DQM provides four *interMedia* indexes, one for each entity.

DQM provides programs that you run to:

- Create *interMedia* indexes. See: DQM Staging Program, page 5-42.
- Optimize *interMedia* indexes. See: DQM Index Optimization Program, page 5-44.
- Update *interMedia* indexes. See: DQM Synchronization Program, page 5-45.

The process started by a Workflow listener to automatically synchronize the staged schema with an updated TCA Registry also updates the *interMedia* indexes.

## B-Tree Index Features

B-Tree indexes are created in the staged schema only for attributes that were transformed for bulk duplicate identification. These indexes provide increased performance over *interMedia* indexes, and are used only for matching processes that involve match rules with the Bulk Duplicate Identification purpose. Use the DQM Staging program to create B-Tree indexes, page 5-42 .

The process started by a Workflow listener to automatically synchronize the staged schema with an updated TCA Registry also updates the B-Tree indexes. If automatic synchronization is not set up, you need to run the DQM Synchronization Program, page 5-45.

See: Bulk Duplicate Identification, page 5- 7 .

## Related Topics

Data Quality Management Overview, page 5- 1

## DQM Staging Program

Use the DQM Staging program to create the staged schema, B-Tree, and *interMedia* indexes. This program applies transformations to a portion of the data contained in the TCA Registry and generates a separate schema with the transformed and standardized data. The time that the program takes to create the staged schema depends on the size of your database and the number of attributes and transformations that you defined.

When you specify in the Staging Command parameter to create indexes, the DQM Index Creation program automatically runs to generate *interMedia* and B-Tree indexes for the staged schema. Invoke the DQM Index Creation program not just to create indexes for the first time, but also to reindex the entire staged schema whenever necessary.

You can use the HZ: DQM Index Creation Memory profile option to override the default amount of memory that is allocated for creating *interMedia* indexes. See: Setting Profile Options, page B- 1 .

To decrease the amount of time it takes to create the staged schema, you can specify how many parallel workers to use when you run the DQM Staging program. Workers are processes that run at the same time to complete a task that would otherwise take longer with a single process. The DQM Staging program invokes the DQM Stage Worker, which spins off parallel workers for staging the data.

Aside from creating the entire staged schema and the *interMedia* indexes, you can also run the DQM Staging program to:

- Stage data using only new transformations
- Generate only mapping procedures, which map attributes to the source columns of the attribute values

- Regenerate only missing or invalid *interMedia* indexes
- Estimate the table disk space needed to stage all data and create indexes

You should estimate the disk space first before actually staging data. The report output displays, in megabytes, the space required to stage each entity and create all indexes, as well as the total for all entities and indexes.

**Note:** Run the DQM Staging program every time that you add or modify attributes or transformations. See: *Defining Attributes and Transformations*, page 5-17.

While the DQM Staging program is running to create new indexes for new or modified attributes and transformations, the staged schema can still be queried and used with the existing indexes. Whether new indexes can be queried is determined by the HZ: DQM Text Index Build Type profile option setting. See: *Setting Profile Options*, page B-1 . If there are new or updated word replacements, however, all indexes are dropped and re-created. In this case, you cannot use the staged schema until the program finishes.

### Prerequisites

Before you submit the DQM Staging program, you must define attributes and transformations. See: *Defining Attributes and Transformations*, page 5-17.

### Program Parameters

- **Number of Parallel Staging Workers:** Enter the number of parallel staging workers, between one and ten, that you want to use to create the staged schema, or leave the parameter blank. The DQM Stage Worker runs with one worker if you leave the parameter blank.
- **Staging Command:** Enter what you want the program to accomplish. This table shows the options.

Staging Command	Description
CREATE_INDEXES	Create Indexes: To invoke the DQM Index Creation program to generate <i>interMedia</i> indexes for the staged schema.
CREATE_MISSING_INVALID_INDEXES	Recreate Missing and Invalid DQM Indexes: To invoke the DQM Index Creation program to regenerate missing or invalid <i>interMedia</i> indexes
ESTIMATE_SIZE	Estimate Disk Size for Staging: To estimate the disk space required to stage all data and create indexes.
GENERATE_MAP_PROC	Generate mapping procedures: To generate only mapping procedures.
STAGE_ALL_DATA	Stage all data, create indexes, and generate map procedures: To stage all data, create <i>interMedia</i> indexes, and generate mapping procedures.
STAGE_NEW_DENORM	Stage New Denormalized Attributes: To stage only new denormalized attributes.
STAGE_NEW_TRANSFORMATIONS	Stage new transformations: To stage data using only new or modified transformations.
STAGE_NEW_TRANSFORMATIONS_NO_INDEXING	Stage new transformations with no indexing: To stage data using only new or modified transformations without rebuilding indexes.

- **Continue previous execution:** Enter *Yes* to continue running a previous DQM Staging program that did not finish. Enter *No* to run a new DQM Staging program.
- **Index Creation Tablespace:** Enter the table space where the *interMedia* indexes are to be created in.
- **Index Creation:** Enter *PARALLEL* to generate multiple indexes at the same time, based on the number of parallel workers that you specified. Enter *SERIAL* to create indexes one after another, even if you specified parallel workers.

## Related Topics

Staged Schema, page 5-40

## DQM Index Optimization Program

Use the DQM Index Optimization program to optimize *interMedia* indexes. You can schedule this program to run on a periodic basis. In general, you can run the DQM Index Optimization program less frequently than the DQM Synchronization program. The DQM Index Optimization program improves the performance of *interMedia* searches, which gradually degrades over time. You should run this program once in a while, but frequent optimization is not mandatory.

The DQM Synchronization program, however, synchronizes data between the TCA Registry and the staged schema, so you should run this program as often as possible to keep the search results accurate. See: DQM Synchronization Program, page 5-45.

### Prerequisites

Before you submit the DQM Index Optimization program, you must make sure that both the staged schema and *interMedia* indexes exist.

### Related Topics

Staged Schema, page 5-40

## DQM Synchronization Program

Use the DQM Synchronization program to synchronize an existing staged schema with the TCA Registry. This program ensures that any new or updated data in the TCA Registry is reflected in the staged schema, and *interMedia* and B-Tree indexes. The program updates the indexes after updating the staged schema.

The DQM Synchronization program includes Registry records of any source, updated and created through either user interfaces or batch loading. The automatic synchronization of the staged schema with the TCA Registry happens only when records are created or updated through user interfaces or TCA import, not other batch loading. This automatic process is started by a periodically running Workflow Agent Listener. See: Implementing Automatic Synchronization of Staged Schema, page 5-46.

You can schedule the DQM Synchronization program to be run on a periodic basis. The frequency that you want to submit this program with depends on:

- How often the information in the TCA Registry usually changes
- How often you search against the TCA Registry
- How much processing power you have

If you run the program frequently, the data in the staged schema and indexes are sooner updated for your searches. The *interMedia* indexes, however become less optimal and slower to use. To optimize the *interMedia* indexes, see: DQM Index Optimization Program, page 5-44.

### Prerequisites

Before you submit the DQM Synchronization program, you must make sure that both the staged schema and indexes exist.

### Program Parameter

**Number of Workers:** Enter the number of parallel workers, between one and ten, that you want to use to synchronize the staged schema, or leave the parameter blank. The synchronization runs with one worker if you leave the parameter blank.

### Related Topics

Staged Schema, page 5-40

## Implementing Automatic Synchronization of Staged Schema

To implement the automatic synchronization of the staged schema with the TCA Registry when records are created or updated through user interfaces or TCA import, you must use an Oracle Workflow agent listener. Depending on the version of Oracle Workflow that you have, you can either use the agent listener service component or concurrent program. See: *Scheduling Listeners for Local Inbound Agents, Oracle Workflow Administrator's Guide*.

Also, set the HZ: Generate Events for DQM Real-Time Synchronization profile option to *Yes* when you want the synchronization to work. You can use this profile option to enable or disable automatic synchronization, at times that suit your needs, without modifying your Oracle Workflow agent listener setup.

### Agent Listener Service Component

Run an Oracle Workflow agent listener to enable deferred processing. Use Oracle Applications Manager (OAM) to ensure that an agent listener service component is scheduled to run for the WF\_DEFERRED agent so that the listener picks up updates to the TCA Registry and starts the synchronization process.

Oracle Workflow provides a seeded agent listener service component named Workflow Deferred Agent Listener to process messages on the standard WF\_DEFERRED agent. This agent listener does not have any correlation ID specified, so that it can operate generally to process all messages on the agent. The agent listener is configured to automatically start running continuously after your installation is complete. You can optionally schedule control events or manually choose control commands to start, stop, suspend, resume, or refresh the agent listener.

You can also optionally create and configure your own additional agent listeners for the WF\_DEFERRED agent. Make sure that the correlation ID is null.

### Workflow Agent Listener Concurrent Program

Schedule the Workflow Agent Listener concurrent program to run periodically, without an end date, to make sure that the listener picks up updates to the TCA Registry and starts the synchronization process.

#### To set up the listener:

1. Submit the Workflow Agent Listener concurrent program once to make sure that it successfully runs and flushes all events in the queue. Use these parameters:

- **Agent Name:** WF\_DEFERRED
- **Correlation ID:** NULL
- **AQ Wait Period:** 1000

This run might take a while, depending on the number of events that were generated in the queue.

2. After the Workflow Agent Listener has successfully completed, set up the same program to run periodically with the same parameters, and with these scheduling options:

- In the Run the Job option group, select *Periodically*.
- Leave the End At field blank.

- Specify to run the program every .25 minutes, or another interval that best suits your business needs, the number of records you have, and the frequency of additions or updates to your database.
- In the Apply the Interval option group, select *From the completion of the prior run*. You must select this option to prevent overlap of program runs.

## Related Topics

Staged Schema, page 5-40

## Merge Dictionary Overview

The Merge Dictionary stores the entities and procedures that must be processed to merge party entities for any Oracle application. During the merge process, each procedure sequentially executes for the entities defined in the Dictionary. Merge programs use the information in the Merge Dictionary to recognize which entities to merge, and they recognize the foreign keys and procedures without the need to recompile or regenerate the application code.

Each Oracle application maintains its own tables to store the information required to complete its business functions. During a merge process, all registered applications must be able to access the data for the appropriate entity that is related to the TCA Registry. If a merge procedure attempts to access a deleted party, the transaction, attributes, and other information for the party cannot be merged.

To maintain how Oracle applications are affected by the merge process, you register the entities, for example Accounts, Organization Contacts, and Party Sites, foreign keys, and procedures for specific Oracle applications in the Merge Dictionary. See: *Maintaining the Merge Dictionary*, page 5-48.

For example, if your company enters into a service contract with one of the parties in your Registry, you would use Oracle Receivables to send invoices and statements to that party and Oracle Service to administer that service contract. If that party is acquired by another party, is identified as a duplicate of another party, or has sites that must be consolidated, you must merge those parties or party sites. This party merge affects customer accounts and attributes of the parties in Oracle Receivables, Oracle Service, and other Oracle Applications.

The registration specifies the names of the procedures required to merge the entities that interact with the party entities. These entities can be identified using the foreign key attributes that they contain. If any entity contains an attribute that is a foreign key to any of the TCA entities, these entities should be part of the Merge Dictionary and a procedure should be created to handle the records in this entity during the merge process.

Some Oracle Applications, along with their party entities, are automatically registered at installation. If you have installed any of these applications, when you perform a merge, the entities associated with the parties in these applications are merged as well. See: *Party and Account Merge Impact, Oracle Trading Community Architecture Reference Guide*.

## Related Topics

Data Quality Management Overview, page 5- 1

## Maintaining the Merge Dictionary

With the Merge Dictionary, you determine the sequence of entities to merge, as well as view, update, and add seeded or custom entities.

You add entities as a child of another entity. The parent entity is merged before the child, and the foreign key of the child points to the parent.

You can delete custom entities from the Merge Dictionary. The data from deleted entities will not be merged during any merge process, and all child entities under the deleted entity will also be deleted.

See: Customizing the Merge Dictionary, page 5-49.

### Prerequisites

Before you add any Oracle application to the Merge Dictionary, you must:

- Identify any entities that have foreign keys in the TCA Registry.
- Create merge procedures by identifying the foreign keys for those entities.

### Entity Details

This table describes the details of the entity that you are viewing, updating, or adding. What you can update depends on whether the entity is seeded or custom.

Detail	Description
Entity	The name of the table that has a foreign key to the HZ_PARTIES table or a related table such as HZ_PARTY_SITES or HZ_CONTACT_POINTS.
Application	The Oracle application affected by the merge process.
Sequence	The order in which the entity is to be processed during a merge.
Parent Entity	The name of the table that the foreign key of the entity refers to.
Primary Key	The name of the primary key column for the entity.
Foreign Key	The name of the foreign key column which links the entity to its parent entity.
Description	A description of the entity, for example <i>Party</i> for HZ_PARTIES.
Description Columns	The name of the columns used to generate a description for the record, for example, PARTY_NAME for the HZ_PARTIES table. You can alternatively enter a complex concatenation or decode expression. The description columns are used in reports and logs.
Procedure Name	The name of the merge procedure, which must conform to the standard merge procedure signature.
Merge Records in Bulk	Whether or not the merge procedure is called once for every record or for all records in the table that references the merged party. If records are merged in bulk, you cannot assign child entities to this entity.
Additional Query Clause	A SQL clause that is used to specify additional filtering conditions for joining the table to the related parent entity.

## Customizing the Merge Dictionary

You can customize the Merge Dictionary by including your own custom entities as part of the merge process, so that custom entities can be merged using standard merge rules or custom rules. You must develop the code to customize the merge procedures used by your custom applications and entities. Your custom merge procedure should:

- Perform any required validations before you run the merge process.
- Meet the processing requirements of your range of business activities.
- Conform to the standard merge procedure signature. This table shows the parameters.

Parameter	Usage	Data Type	Description
p_entity_name	IN	VARCHAR2	Name of the entity being merged.
p_from_id	IN	NUMBER	Primary key ID of the merge-from record.
p_to_id	IN / OUT	NUMBER	<ul style="list-style-type: none"> <li>• <b>IN:</b> Primary key ID of the merge-to record.</li> <li>• <b>OUT:</b> Primary key ID of the merge-to record if the record is identified as part of the duplicate check.</li> </ul>
p_from_fk_id	IN	NUMBER	Foreign key ID of the merge-from record.
p_to_fk_id	IN	NUMBER	Foreign key ID of the merge-to record.
p_parent_entity_name	IN	VARCHAR2	Name of the parent entity.
p_batch_id	IN	NUMBER	Batch ID.
p_batch_party_id	IN	NUMBER	ID that uniquely identifies the batch and party record being merged. Use this ID to reference batch information.
x_return_status	IN / OUT	VARCHAR2	Status of the call. Returned values are: <ul style="list-style-type: none"> <li>• <b>FND_API.G_RET_STS_SUCCESS:</b> Success</li> <li>• <b>FND_API.G_RET_STS_ERROR:</b> Expected Error</li> <li>• <b>FND_API.G_RET_UNEXP_ERROR:</b> Unexpected Error</li> </ul>

If the relationship between the parent and child entities involve more than one foreign key or is complex, you can enter an additional join condition in the merge procedure.

For example, the HZ\_CONTACT\_POINTS table can be associated with either a party or party sites based on the value of the owner\_table\_name. To associate HZ\_CONTACT\_POINTS with:

- The HZ\_PARTIES table
  - Enter the join condition as *hz\_contact\_points.owner\_table\_name = HZ\_PARTIES*.
  - Define the foreign key as *owner\_table\_id*.
- The HZ\_PARTY\_SITE table

- Enter the join condition as *hz\_contact\_points.owner\_table\_name = HZ\_PARTY\_SITE*.
- Define the foreign key as *owner\_table\_id*.

## Related Topics

Merge Dictionary Overview, page 5-47

## Creating Custom Merge Master Party Defaulting Method

The merge master party is the party in a duplicate set that remains in the TCA Registry after a merge. The HZ: Merge Master Party Defaulting profile option setting determines the method to use for defaulting the master for each duplicate set. You can define a custom user hook and set the profile option to *User Hook* to use your method. See: *Data Quality Management Profile Options*, page B- 8 .

## Parameters

The parameters for the custom user hook are:

- Input
  - p\_dup\_set\_id (duplicate set identifier)
- Output
  - x\_master\_party\_id
  - x\_master\_party\_name
  - x\_return\_status
  - x\_msg\_count
  - x\_msg\_data

## User Hook Example

```

/* Use OSO party as master party, if it doesn't exist, use any pa
rty id
in the dup set*/

procedure default_master_user_hook(
  p_dup_set_id          IN NUMBER,
  x_master_party_id    OUT NOCOPY NUMBER,
  x_master_party_name  OUT NOCOPY VARCHAR2,
  x_return_status      OUT NOCOPY VARCHAR2,
  x_msg_count          OUT NOCOPY NUMBER,
  x_msg_data           OUT NOCOPY VARCHAR2 ) is

  cursor get_OSOPartyId_csr is
    SELECT PP.PARTY_ID, PP.PARTY_NAME
    FROM HZ_PARTIES PP,HZ_DUP_SETS DS, HZ_DUP_SET_PARTIES DSP,

HZ_DUP_BATCH DB
    WHERE PP.PARTY_ID =DSP.DUP_PARTY_ID
    AND DB.DUP_BATCH_ID = DS.DUP_BATCH_ID
    AND DS.DUP_SET_ID = DSP.DUP_SET_ID

```

```

        AND DSP.DUP_SET_ID= p_dup_set_id
        AND PP.CREATED_BY_MODULE = 'OSO_CUSTOMER'
        AND NVL(DSP.MERGE_FLAG,'Y') <> 'N'
        AND ROWNUM = 1;

cursor get_RandomPartyId_csr is
    SELECT PP.PARTY_ID, PP.PARTY_NAME
    FROM HZ_PARTIES PP,HZ_DUP_SETS DS, HZ_DUP_SET_PARTIES DSP,

HZ_DUP_BATCH DB
    WHERE PP.PARTY_ID =DSP.DUP_PARTY_ID
    AND DB.DUP_BATCH_ID = DS.DUP_BATCH_ID
    AND DS.DUP_SET_ID = DSP.DUP_SET_ID
    AND DSP.DUP_SET_ID= p_dup_set_id
    AND NVL(DSP.MERGE_FLAG,'Y') <> 'N'
    AND ROWNUM = 1;

begin
    -- Initialize return status to SUCCESS
    x_return_status := FND_API.G_RET_STS_SUCCESS;

    open get_OSOPartyId_csr;
    fetch get_OSOPartyId_csr into x_master_party_id,x_master_party
_name;
    close get_OSOPartyId_csr;

    if x_master_party_id is null /* OSO party doesn't exist */
then
        open get_RandomPartyId_csr;
        fetch get_RandomPartyId_csr into
x_master_party_id,x_master_party_name;
        close get_RandomPartyId_csr;
    end if;

EXCEPTION
    WHEN OTHERS THEN
        x_return_status := FND_API.G_RET_STS_UNEXP_ERROR;

        FND_MESSAGE.SET_NAME('AR', 'HZ_API_OTHERS_EXCEP');
        FND_MESSAGE.SET_TOKEN('ERROR',SQLERRM);
        FND_MSG_PUB.ADD;

        FND_MSG_PUB.Count_And_Get(
            p_encoded => FND_API.G_FALSE,
            p_count => x_msg_count,
            p_data => x_msg_data);

end;
```

## Related Topics

Data Quality Management Overview, page 5- 1

## Automerger

Automerger automatically merges records that exceed a specified threshold during duplicate identification. The Automerger program only runs if the match rule specified for the duplicate identification process is designated for Automerger.

**Note:** Automerger is always implemented as part of a duplicate identification process. You can manually run Automerger only to resubmit an automatic run that resulted in error.

The Automerger program evaluates records against the match and automatic merge thresholds set in that match rule. The program:

- Automatically merges records that meet or exceed the automatic merge threshold.
- Creates a System Duplicate Identification (SDI) batch containing records that exceed the match threshold but not the automatic merge threshold. The SDI batch is available in Oracle Customer Data Librarian for merge consideration.

If a party is to be automatically merged, but already exists in a merge request in Oracle Customer Data Librarian, then an error is recorded in the Automerger log, and that party is not merged with its duplicates. The program continues and merges other parties that do not incur errors. See: *De-Duplication Overview, Oracle Customer Data Librarian User Guide*.

## Rules for Automerger

In each duplicate set, two or more duplicate candidates are automatically merged into one merge master record. You can control aspects of the merge through profile options.

- The HZ: Merge Master Party Defaulting profile option setting determines which party in each duplicate set is the master.
- The HZ: Default Profile Attributes for Merge Mapping and HZ: Default Secondary Profile Attributes for Merge Mapping profile option settings determine which party profile attributes remain after the merge.
- The HZ: Use DQM Suggested Groupings for Automerger profile option determines if addresses and relationships are merged based on DQM suggestions, or are just transferred from duplicate candidates to the master.

See: *Data Quality Management Profile Options, page B- 8*.

Other rules of Automerger are:

- For attributes other than party profile attributes, if the master already has a value, then that value survives the merge. If not, then the value is transferred from the duplicate candidate with the latest creation date and an attribute value.
- For relationships, If the subject party Registry ID for the merge master and duplicate candidates are the same, and the relationship type is the same, then Automerger merges the relationship records. See: *Relationships Overview, Oracle Trading Community Architecture User Guide*.
- If the party sites for the merge master and duplicate candidates have the same location ID, then the party sites are merged instead of transferred.
- All transactions and accounts are transferred from the duplicate candidates to the merge master.

## Program Parameters

Run this program from Standard Request Submission only to resubmit an Automerge that resulted in error.

- **Batch:** Enter the batch number to rerun Automerge for. Only previously failed batches are available.
- **Number of Workers:** Enter the number of workers for the process. The recommended number is four, and the maximum number is ten.

## Related Topics

Data Quality Management Overview, page 5- 1



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## Data Sharing and Security

This chapter describes administering Data Sharing and Security, including creating, updating, and viewing data sharing groups as well as assigning access privileges.

This chapter covers the following topics:

- Data Sharing and Security Overview
- Administering Data Sharing and Security
- Creating a Data Sharing Group
- Updating a Data Sharing Group
- Assigning Privileges to Access a Data Sharing Group

### Data Sharing and Security Overview

Oracle Trading Community Architecture provides a model for managing information about entities such as customers. The TCA Data Sharing and Security (DSS) feature provides the capability to manage who can create, modify, and delete information about TCA data model entities across the applications in the Oracle E-Business Suite.

You can configure applications in the E-Business Suite to implement the data sharing and security rules required by your organization's internal policies and procedures, as well those required by governmental regulations and laws. For example, you can establish security rules so that only healthcare workers can change personal information about patients.

The DSS feature registers data security rules in a central repository using the security features of Oracle's Application Object Library (AOL). Because E-Business Suite applications use the TCA public application programming interfaces (APIs) to create, update, and manage party information, data security rules are encoded in these APIs to enforce consistent behavior across the E-Business Suite.

With the DSS feature, you can control access to the following TCA data model entities:

- Parties
- Person parties
- Organization parties
- Relationships
- Classification code assignments

- Party sites
- Locations
- Party contact points
- Party site contact points

## Administering Data Sharing and Security

To secure information about entities, a TCA data security administrator must define the data sharing groups that specify the criteria used to determine the data to be secured. Security criteria can be one or more of the following characteristics:

- Classification
- Relationship
- E-Business Suite module used to create the data

After defining a data sharing group, the TCA data security administrator can assign access privileges to users who create, update, or delete information secured by the data sharing group. You can assign access privileges to users at the following levels:

- Global or public (all users)
- Responsibility
- Individual user

**Note:** You cannot use the DSS feature to restrict users of an application from viewing information created and maintained in that application. The DSS feature limits the ability of users to create, update, or delete information that is secured based on that data sharing group definition.

For more information see the *Oracle Applications System Administrator Guide* and the user guides for the applications in the E-Business Suite.

Two responsibilities can access the Security Administration pages:

- **Trading Community Manager:** Can only view existing data sharing groups and cannot create new data sharing groups or update existing ones.
- **TCA Data Security Administrator:** Has both view and update access privileges.

### Example

Consider the case of a hospital implementing Oracle applications powered by TCA. In this situation, the hospital could define different data sharing groups to secure patient information as well as hospital employee information. A security conflict might occur if a hospital employee falls ill and becomes a patient at the same hospital. Which privilege assignment scheme controls access to this entity?

The DSS feature addresses this issue by allowing administrators to create a third data sharing group that defines the privileges associated with creating, updating, and deleting records of parties that are both employees and patients. For the appropriate privilege assignment to take place, this third data sharing group must be assigned a rank that is higher than the rank assigned to the Employee Only or the Patient Only groups.

## Seeded Data Sharing Groups

You can use the seeded data sharing groups listed in this table, in addition to the ones that you create.

Group Name	Group Code
Public	PUBLIC
Human Resources Shared Data	HR_SHARED

## Related Topics

Data Sharing and Security Overview, page 6- 1

Introduction to Administration, page 1- 1

## Administration Process

A TCA data security administrator creates and updates data sharing groups, enables or disables data sharing groups, and assigns access privileges to responsibilities and users.

**Note:** To create, update, or delete data sharing groups you must have the TCA Data Security Administrator responsibility.

The Data Sharing and Security Administration page provides a starting point for a TCA data security administrator to define security rules and to assign access privileges for information modeled by the Oracle Trading Community Architecture.

- To create a new data sharing group, click the Create button. See: Creating a Data Sharing Group, page 6- 4 .
- To assign the privilege to access a data sharing group to a responsibility or an individual user, click the Assign Privileges icon for the appropriate data sharing group. See: Assigning Privileges to Access a Data Sharing Group, page 6- 6 .
- To view and update a data sharing group, click the data sharing group name. See: Updating a Data Sharing Group, page 6- 6 .

The Trading Community Manager responsibility can only view information. Only the TCA Data Security Administrator responsibility can also update the data sharing group information.

When you define a data sharing group, you must explicitly assign access privileges to the information secured by the data sharing groups. If an entity is secured by a data sharing group, then explicit assignments must be made to the appropriate users or responsibilities to define their access privileges. If privilege assignments are not made, then no one will have access to the information.

If an entity is not covered by any defined data sharing group, you can use the HZ: Default Data Sharing Group profile option to designate the default group that would be assigned to that entity.

To control the release of Data Sharing and Security, TCA data security administrators can use the HZ: Data Sharing and Security Enabled profile option to limit TCA security features to a specific user before generally releasing the functionality to ensure a

controlled release. Furthermore, data sharing groups can be set up, but not enabled until the desired security is ready to be enforced.

See: Setting Profile Options, page B- 1 .

## Related Topics

Administering Data Sharing and Security, page 6- 2

## Creating a Data Sharing Group

This process enables a TCA data security administrator to define data sharing groups by specifying information that identifies the data sharing group and the criteria that define the group: classifications, relationships, source modules, and specific TCA data model entities supported by the DSS feature.

**Note:** A TCA data security administrator can only set table or row level security. Specific attributes such as a person's date of birth cannot be secured. However, the entire person profile can be secured using the Create Data Sharing Group page.

This page can only be accessed with a TCA Data Security Administrator responsibility.

### To create a data sharing group:

1. Click the Create button in the Data Sharing and Security Administration page. See: Administration Process, page 6- 3 .
2. Enter a name for this group in the Data Sharing Group Name field.  
The name should be descriptive of the secured data and of the users, responsibilities, and public that you assign the privilege of accessing this data sharing group.
3. Enter a code for this group in the Data Sharing Group Code field.  
This code must be a unique identifier. The code cannot be updated, although other attributes can be.
4. Enter a description for this group in the Data Sharing Group Description field.
5. You can specify the rank of this group that will be used to resolve conflicting security rules between groups and to order the display of this group with other groups on the Data Sharing and Security Administration page. Rank controls the order in which data sharing groups are evaluated to determine which sharing group applies to data.  
For example, you can set up two data sharing groups, one for patients and one for employees. If the Patient group is ranked higher than the Employee group, then information about an employee who is a patient would be secured as part of the Patient group.
  - Select the Last option to place this data sharing group at the end of the list.
  - Select the Before option and a data sharing group to place the new data sharing group before the selected existing data sharing group.
6. Check or clear the Enable Data Sharing Group check box.

7. In the Classifications region, add class categories to be included in this data sharing group.
8. Enter the name of a classification, or class code, associated with each class category.  
The Class Path column displays the hierarchical position of class codes in the class code hierarchy of a class category.  
For more information on classifications, see: *Classifications Overview*, page 4- 1 and *Administering Classifications*, page 4- 3 .
9. Check or clear the Enabled check box to enable or disable the class category and classification.
10. Add relationship roles, such as Employee, Patient, Customers, and so on in the Relationships region.
11. Check or clear the Enabled check box to enable or disable the relationship role.  
For more information on relationships, see: *Administering Relationships*, page 3- 1 .
12. In the Created By Module region, enter a source application or module that stores and maintains the information secured by this data sharing group. This section displays a list of the applications and modules, secured by a TCA data security administrator, that created the entity within the TCA registry.  
For example, to only allow Oracle Healthcare application users to create a particular person entity called Patient, then the TCA data security administrator may secure the Patient relationship in the Relationships region, the Business Function of Patient in the Classifications region, and the Oracle Healthcare Applications (OHC) in the Created By Module region to specify the business rules needed to secure patient information.
13. Check or clear the Enabled check box to enable or disable the created by module.
14. Check or clear the check boxes, in the Entities region, for the entities secured by this data sharing group.  
The DSS feature encapsulates the following entities modeled within TCA:
  - Parties
  - Person parties
  - Organization parties
  - Relationships
  - Classification code assignments
  - Party sites
  - Locations
  - Party contact points
  - Party site contact points
15. Click the Apply button to create this data sharing group.

## Related Topics

*Administering Data Sharing and Security*, page 6- 2

## Updating a Data Sharing Group

This process enables a TCA data security administrator to update existing data sharing groups by modifying the classifications, relationship roles, and entities of previously defined data sharing groups.

You can modify or update existing criteria based on changes in the application used to create and manage the information a TCA data security administrator secures. For example, if an enterprise plans to use Customers Online, in addition to its Oracle TeleService call center, the TCA data security administrator could modify an existing data sharing group used to protect customer information to include Customers Online, so that only users of the two applications can create, update or delete customer information modeled within TCA.

This page can only be accessed with the TCA Data Security Administrator responsibility.

### To update the information about a data sharing group:

1. Click the name of a data sharing group in the Data Sharing and Security Administration page. See: Administration Process, page 6- 3 .
2. Modify the details of the data sharing group, as necessary, in the Update Data Sharing Group page.

In response to changes in their organization's business policies or requirements, TCA data security administrators can:

- Enable or disable an existing classification, relationship, or created-by module from the data sharing group.
- Edit or add classifications, relationships, or created-by modules.

See: Creating a Data Sharing Group, page 6- 4 .

3. Click the Apply button.

## Related Topics

Administering Data Sharing and Security, page 6- 2

## Assigning Privileges to Access a Data Sharing Group

This process enables TCA data security system administrators to assign specific users, responsibilities, or all users (public) to specific data sharing groups.

A data sharing group assignment is a special entity that associates any entity with a data sharing group. Due to the configurable nature of the Data Sharing and Security solution, not all TCA entities are directly associated with a data sharing group, but only those that require protection. When you assign data sharing group privileges, those users, responsibilities, or groups can access the information protected by that data sharing group.

### To assign data sharing and security access privileges to a responsibility or user:

1. On the Data Sharing and Security Administration page, click the Assign Privileges icon for a data sharing group. See: Administration Process, page 6- 3 .
2. On the Assign Privileges page, select the type of grantee:

- **Public:** All users
  - **Group:** Responsibility
  - **User:** Individual user
3. Enter the user or responsibility name of the grantee in the Name field, or use the list of values to find and select a user or responsibility name set up by the system administrator.
  4. Check the appropriate check boxes to give create, update, or delete privileges to a grantee.
  5. Click the Apply button.

## **Related Topics**

Administering Data Sharing and Security, page 6- 2



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# Adapters

This chapter describes administering adapters, including defining, updating, and viewing adapter configurations.

This chapter covers the following topics:

- Adapters Overview
- Administering Adapters
- Creating Address Validation Adapters

## Adapters Overview

Adapters allow for data integration services between the TCA Registry and a third party or deploying company data source. TCA uses adapters for address validation.

Address validation is the process of comparing a raw or user-entered address against a verified or authorized database to determine if the address is recognized and factually correct according to the source database. An outcome of address validation is address correction, in which a user-entered address is evaluated, corrected, completed, and returned for further processing.

The TCA address validation feature uses a central XML open-standards based "black box" that allows integration with third party service providers and custom solutions, through adapters that you or the third party provide. The black box can accept requests from callers, such as the Address Validation program, and integrate with adapters to process those requests.

An example of this process is:

1. The Address Validation program sends requests with address data to the address validation black box.
2. The black box invokes the appropriate vendor adapter based on adapter configuration settings, and passes an XML message request to the appropriate third party or custom adapter.
3. Utilizing an XML message format, the adapter generates an outbound XML document and passes a location service request to a vendor solution that allows single or bulk synchronous transaction requests using a synchronous HTTP v1.1 Post connection.
4. The vendor solution interprets these transaction requests, validates the addresses against the vendor's location libraries, and sends an XML response back to the adapter.

5. The adapter returns an XML response to the Address Validation program.

Through this process, addresses are validated in the TCA Registry against the standard address information that the adapter is linked to, resulting in a validated, corrected, enriched, or geocoded address in the TCA Registry.

This solution is optimized for synchronous processing of bulk requests. It is not intended for asynchronous processing of single interactive requests such as when users enter data through a user interface.

## Related Topics

Setting Up Address Validation, page 2- 4

Administering Adapters, page 7- 2

Creating Address Validation Adapters, page 7- 4

## Administering Adapters

To use a third party or custom-made adapter with TCA, you must define and administer adapter configurations. For each adapter, you specify information such as the adapter name and description, the method used to invoke the adapter, and the XML message format that the adapter uses.

First you search for the adapter to administer, by name or the country that the adapters support. You can then:

- View adapter configurations.
- Update adapter configurations.
- Create adapter configurations after you verify from the search results that the adapters do not already exist.

**Note:** Only enabled adapters can be used to process data from the TCA Registry.

## Related Topics

Adapters Overview, page 7- 1

Configuring Adapters, page 7- 2

Introduction to Administration, page 1- 1

## Configuring Adapters

When you view, create, or update adapter configurations, the information displayed or to be entered is the same. After you view an adapter, you can optionally update its configuration.

### Adapter Details

- **Message Format:** The XML message format that the adapter uses.
- **Default Batch Size:** The default number of records the adapter can handle in one batch. This number is used if the maximum batch size is not defined.

- **Maximum Batch Size:** The maximum number of records the adapter can handle in one batch. This number must be greater than or equal to 1.
- **Invoke Method:** The method used to communicate with the adapter, for example HTTP V1.1 Post.
- **Host Address:** The host address of the adapter, applicable only if the invoke method is HTTP.
- **Default Replace Status Code:** For adapters used with address validation, the default code that must be reached or exceeded for an address to be updated with data from the adapter service. This default code is used if the caller to address validation adapters does not specify a code.

For example, if the code is 2, the service linked to the adapter must validate a TCA address up to at least the street or thoroughfare level before updating that address with the service’s standard address. Addresses with validation status 0, 1, or 2 would be updated.

This table describes the available status codes.

Status	Meaning	Description
0	Valid Address	The highest level of validation. The address has been certified deliverable based on postal authority certifications.
1	Multiple or Ambiguous Address	Address has been validated to the street level, but there is ambiguity to locate the specific address.
2	Street or Thoroughfare Match	Address has been validated to the street level, but no further.
3	Municipality Match	Address has been validated to the city or town level, but no further.
4	Administrative Subdivision Match	Address has been validated to be within the country’s main administrative subdivision, such as province or state, but no further.
5	Country Match	Address has only been validated to the country level, but no further.
6	No Match	Address could not be validated in any way.

### Adapter Countries

For adapters used with address validation, you specify the countries that the adapter supports. For example, if an adapter can validate only addresses from France and Australia, only those two countries should be listed. The adapter can process addresses only for countries that are enabled.

**Note:** If an adapter is used to set the HZ: Default Location Service Adapter profile option, you cannot disable that adapter unless you set the profile option with another adapter. See: Address Validation Profile Options, page B- 5 .

You can indicate that the adapter is the default to use for specific countries. Only one adapter can be the default for each country. For example, if the Gorman adapter is already the default for Italian addresses, and you try to set Elcaro as the default adapter, you can either stay with Gorman or switch to Elcaro.

## Related Topics

Administering Adapters, page 7- 2

## Creating Address Validation Adapters

To communicate with the TCA Registry in the Oracle E-Business Suite, your adapter must meet the following technical requirements.

## Communication Protocol

HTTP v1.1 Post is the only communication protocol currently supported. Because communication failures may occur during the HTTP request, a default timeout is set in TCA for 300 seconds after which the program terminates execution. You can modify this default timeout by changing the HZ: Timeout Limit for Address Validation profile option. See: Address Validation Profile Options, page B- 5 .

## XML Message Format

### Mandatory XML Message Format

The following XML message format is mandatory for address validation communication with the TCA Registry:

```
<?xml version="1.0"?>
  <LocationService>
    <ADAPTERCONTENTSOURCE></ADAPTERCONTENTSOURCE>
    <OVERWRITETHRESHOLD></OVERWRITETHRESHOLD>
    <REQUESTTYPE></REQUESTTYPE>
    <Location>
      <Id></Id>
      <Address>
        <AddressLine index="1"></AddressLine>
        <AddressLine index="2"></AddressLine>
        <AddressLine index="3"></AddressLine>
        <AddressLine index="4"></AddressLine>
        <City></City>
        <County></County>
        <CountrySubEntity></CountrySubEntity>
        <Country></Country>
        <PostalCode></PostalCode>
      </Address>
      <UserArea>
        <LocationService.Location.UserArea>
          <LocationService.Status></LocationService.Status>
        </LocationService.Location.UserArea>
      </UserArea>
    </Location>
  </LocationService>
```

## Modifiable Elements

In general, you can modify the data within the <Location> </Location> tag except for the Id tag.

**Important:** You must never modify the <Id></Id> tag. This tag is the internal identifier from the TCA Registry for the specific record.

The elements you can change are:

```
<Address>
  <AddressLine index="1"></AddressLine>
  <AddressLine index="2"></AddressLine>
  <AddressLine index="3"></AddressLine>
  <AddressLine index="4"></AddressLine>
  <City></City>
  <County></County>
  <CountrySubEntity></CountrySubEntity>
  <Country></Country>
  <PostalCode></PostalCode>
</Address>
<UserArea>
  <LocationService.Location.UserArea>
    <LocationService.Status></LocationService.Status>
  </LocationService.Location.UserArea>
</UserArea>
```

## Required Tags

The <LocationService.Status></LocationService.Status> tag is a mandatory part of the XML response message returned from the vendor adapter to the TCA Registry. This tag is defined as a standardized status code in TCA, which describes the results of the address validation. You must map your solution's return statuses for each record validated to one and only one of these statuses. You must return a status for each address validated.

Because these status codes are vendor-independent, all vendor result codes must be mapped to these TCA status codes. The mappings between the vendor codes and the TCA statuses are not stored in the TCA Registry. Any configuration or remapping of the vendor codes to the TCA statuses must be done outside of TCA, for example, either in the vendor adapter or in the vendor's product itself.

The acceptable status values and the definition for each are listed in the following table below.

Code	Meaning	Description
0	Valid Address	The highest level of validation. The address has been certified deliverable based on postal authority certifications.
1	Multiple or Ambiguous Address	The address has been validated to the street level, but there is ambiguity to locate the specific address.
2	Street or Thoroughfare Match	The address has been validated to the street level, but no further.
3	Municipality Match	The address has been validated to the city or town level, but no further.
4	Administrative Subdivision Match	The address has been validated to be within the country's main administrative subdivision such as province or state, but no further.
5	Country Match	The address has only been validated to the country level, but no further.
6	No Match	The address could not be validated in any way whatsoever.

### Additional Information

Extra information such as delivery route, census block, tax map key, and so on, that is related to a particular address could be useful to the caller for mailing industry demographic analysis or marketing campaigns. For this type of information, or for other information for which no specific tag exists, you may add new tags to return this information back between the `<LocationService.Location.UserArea>` and `</LocationService.Location.UserArea>` tags.

**Caution:** Never remove or alter any existing tags listed in the `<LocationService.Location.UserArea>`. TCA's bulk import process uses these tags.

### Nonaddress Information Handling

If an address passed to your adapter for validation contains a line of nonaddress elements such as "Attn: Mr. ..." or "C/O" or "Care of: ...", you must store the data in that line. Your adapter must return it to the original address line.

For example:

```
<Address>
  <AddressLine index="1">Attn: Joe Smith</AddressLine>
  <AddressLine index="2">500 Main Street</AddressLine>
  <AddressLine index="3"></AddressLine>
  <AddressLine index="4"></AddressLine>
  <City>Redwood Shores</City>
  <County>San Mateo</County>
  <CountrySubEntity>CA</CountrySubEntity>
  <Country>US</Country>
  <PostalCode>94065</PostalCode>
</Address>
```

## Sending Multiple Addresses For Validation

If your adapter receives multiple addresses in a single transmission, you may use the same structure from the <Location></Location> tag downward to respond.

For example, if two addresses are being passed for processing (500 Main Street, Redwood Shores, CA, and 123 Easy Street, Mountain View, CA) the message would look like this:

```
<Location>
  <Id>1001</Id>
  <Address>
    <AddressLine index="1">500 Main Street</AddressLine>
    <AddressLine index="2"></AddressLine>
    <AddressLine index="3"></AddressLine>
    <AddressLine index="4"></AddressLine>
    <City>Redwood Shores</City>
    <County>San Mateo</County>
    <CountrySubEntity>CA</CountrySubEntity>
    <Country>US</Country>
    <PostalCode>94065</PostalCode>
  </Address>
  <UserArea>
    <LocationService.Location.UserArea>
      <LocationService.Status></LocationService.Status>
    </LocationService.Location.UserArea>
  </UserArea>
</Location>

<Location>
  <Id>1123</Id>
  <Address>
    <AddressLine index="1">123 Easy Street</AddressLine>
    <AddressLine index="2"></AddressLine>
    <AddressLine index="3"></AddressLine>
    <AddressLine index="4"></AddressLine>
    <City>Mountain View</City>
    <County>Santa Clara</County>
    <CountrySubEntity>CA</CountrySubEntity>
    <Country>US</Country>
    <PostalCode>94022</PostalCode>
  </Address>
  <UserArea>
    <LocationService.Location.UserArea>
      <LocationService.Status></LocationService.Status>
    </LocationService.Location.UserArea>
  </UserArea>
</Location>
```

## XML Message Example

The following is an example of an XML message:

```

<?xml version="1.0"?>
  <LocationService>
    <ADAPTERCONTENTSOURCE>2</ADAPTERCONTENTSOURCE>
    <OVERWRITETHRESHOLD>2</OVERWRITETHRESHOLD>
    <REQUESTTYPE>Validate</REQUESTTYPE>
    <Location>
      <Id>1001</Id>
      <Address>
        <AddressLine index="1">500 Main Street</AddressLine>
        <AddressLine index="2"></AddressLine>
        <AddressLine index="3"></AddressLine>
        <AddressLine index="4"></AddressLine>
        <City>Redwood Shores</City>
        <County>San Mateo</County>
        <CountrySubEntity>CA</CountrySubEntity>
        <Country>US</Country>
        <PostalCode>94065</PostalCode>
      </Address>
      <UserArea>
        <LocationService.Location.UserArea>
          <LocationService.Status></LocationService.Status>
        </LocationService.Location.UserArea>
      </UserArea>
    </Location>
  </LocationService>

```

## Related Topics

[Adapters Overview, page 7- 1](#)

This chapter describes administering phone numbers, including time zone information and phone formats.

This chapter covers the following topics:

- Administering Phones

## Administering Phones

In the TCA Registry, phone numbers can be of type telephone, fax, pager, or voice mail. For phone numbers, you can:

- Define time zone information for phone numbers based on country or area code, page 8- 1 .
- Define phone formats for parsing and displaying phone numbers, page 8- 2 .

## Related Topics

Introduction to Administration, page 1- 1

## Defining Time Zones for Phones

For phone numbers in a country, you can define time zone information based on the country or its area codes. Countries with multiple time zones should not have a country time zone, but rather multiple area code time zones. You can set either a country time zone or area code time zones, but not both types.

**Note:** The time zone information is not for mobile phone numbers or pagers.

When you set a time zone at the country level, you permanently delete all area code time zones, if any exist, for that country. If you want to switch from a country time zone to area code time zones, you must first delete the country time zone.

To define area code time zones, you create or update area codes for the country. The area code description is usually the city or region that the area code encompasses. Multiple area codes can have the same time zone. If you want to switch from area code time zones to a single country time zone, just set the country time zone.

## Related Topics

Administering Phones, page 8- 1

## Defining Phone Formats

Use the Define Phone Formats window to set up phone formats for parsing and displaying phone numbers. This window lets you define country-specific components of phone numbers, display format styles, and area codes. You can also specify country-specific mobile prefixes to determine if a phone number is mobile or not.

To display the phone number based on the phone formats that you define in this window, a user interface must call the parsing routine of the Phone Number Parsing API and the display routine of the Phone Number Formatting API. Parsing occurs only if the territory code is always specified as an input parameter for the Phone Number Parsing API. See:

- Phone Number Parsing API, *Oracle Trading Community Architecture Technical Implementation Guide*
- Phone Number Formatting API, *Oracle Trading Community Architecture Technical Implementation Guide*

In the Define Phone Formats window, you must set up phone formats for each country that you enter phone numbers for. The Phone Number Parsing API uses the phone formats to correctly parse phone numbers into these segments: phone country code, area code, and subscriber number. Phone formats also determine the correct format style for displaying phone numbers in user interfaces.

For example, for the US phone format, you define the phone country code as 01, the fixed area code as three numbers in length, the subscriber number as seven digits in length, and the format style as 999-999-9999. The Phone Number Parsing and Phone Number Formatting APIs parse and format phone numbers accordingly into three components. 1234567890 would be 01 phone country code, 123 area code, and 456-7890 subscriber number, and display as 123-456-7890.

### To define phone formats:

1. Navigate to the Define Phone Formats window.
2. Query the two-letter country code for the country that you want to define phone formats for.
3. Enter country-specific phone information:
  - **Phone code:** The phone country code, for example 1 for the US
  - **International prefix:** The code to dial before international numbers when calling from the country that you are setting up, for example 011 for the US
  - **Trunk prefix:** The code to dial before long distance numbers within the country, for example 1 for the US
  - **Phone length and area code length:** The number of digits in the subscriber number and area code for this country, only if either is fixed
4. Define phone format styles in the Formats tabbed region:
  - In the Style field, use 9 to represent digits in the area code and subscriber number, and enter other characters as separators, for example, (999) 999-9999.

**Note:** You can set up only one phone format style for each area code length. If a country has area code lengths of two three digits, you can set up two styles, for example, (99) 9999-9999 and (999) 999-9999.

- In the Area Code Size field, enter the number of digits in the area code for each style.
5. Define area codes that you want to use for this country in the Area Codes tabbed region.
  6. Define mobile prefixes that you want to use for this country in the Mobile Prefixes tabbed region.

Mobile prefixes contain the area code and possible prefixes of the subscriber number. For example, the mobile prefix of 650506 consists of the 650 area code and the 506 subscriber number prefix.

**Note:** Mobile prefixes work only in countries where subscriber prefixes are based on area codes.

## Related Topics

Administering Phones, page 8- 1



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# Extensions

This chapter describes administering extensions, setting up custom attributes to extend the TCA Registry.

This chapter covers the following topics:

- Administering Extensions

## Administering Extensions

Extend the Oracle Trading Community Architecture (TCA) Registry by creating an unlimited number of user-defined attributes. TCA extensions use the extensibility framework and features from Oracle Product Lifecycle Management (PLM). See: *User-Defined Attributes, Oracle Advanced Product Catalog User Guide*.

You can create groups of extended attributes for these objects, the TCA entities:

- Locations (HZ\_LOCATIONS)
- Organization Profiles (HZ\_ORGANIZATION\_PROFILES)
- Party Sites (HZ\_PARTY\_SITES)
- Person Profiles (HZ\_PERSON\_PROFILES)

Associate functions and actions with attribute groups to use custom logic and determine end user interaction. Assign attribute groups to pages so that the attributes are displayed in specific UI pages.

**Note:** TCA extensions administration does not use the PLM security model or TCA Data Sharing and Security. TCA attributes that you extend can be used only in Oracle Customers Online.

If you also use profile versioning, schedule programs to periodically synchronize the extensions data with organization or person profile records. See: *Copying Extensions Data for Profile Versioning, page 9-7*.

## Related Topics

Extensions Process, page 9- 2

Extensions Example, page 9- 3

Introduction to Administration, page 1- 1

## Extensions Process

### Prerequisites

Create detailed plans of user-defined attributes and their usage in user interfaces, as well as any functions.

### Procedure

1. Select the entity that you want to extend.
2. **Value Sets:** Create value sets for attributes validation, if needed. See:
  - *Creating Value Sets, Oracle Advanced Product Catalog User Guide*
  - *Defining Table Value Sets, Oracle Advanced Product Catalog User Guide*
  - *Creating Independent Values, Oracle Advanced Product Catalog User Guide*
3. **Attribute Groups:** Create the attribute group and add attributes to the group, including any corresponding value sets. See: *User-Defined Attributes, Oracle Advanced Product Catalog User Guide*.

**Important:** The PLM view and edit privileges are not used for extending TCA attributes.

**Note:** After you save attributes, you cannot change the data type. You also cannot delete the attributes from the TCA Registry. You can, however, disable them so that they are not displayed in user interfaces.

4. **Functions:** Define functions, if needed. See: *Creating User-Defined Functions, Oracle Advanced Product Catalog User Guide*.

To add parameters to the function after it is created, click the name of the function in the main Functions page. You open the function details, which includes parameters and usages.

5. **Associations:** Click Add Attribute Groups and select the group, with the entity as the data level. This association is needed before you can assign the groups to pages.

If needed, back in the main Associations page, click Update Actions for the attribute group and create actions to link functions to the attribute group and entity combination. After the action is created, map function parameters to attributes by clicking the action name in the Actions page. You open the action details, including the function mappings.

**Important:** The PLM security privileges are not used for extending TCA attributes.

6. **Pages:** Create a page and add the attribute group for the group to be used in user interfaces that leverage the page.

**Note:** The attribute group and page are automatically associated with the Administrator Defined classification.

## Related Topics

Administering Extensions, page 9- 1

Extensions Example, page 9- 3

## Extensions Example

You need to store eye color, hair color, and body measurements for persons in the TCA Registry, for a UI in which users can update person profiles. You also need to let users calculate the body mass index based on the entered weight and height.

## Prerequisites

1. Plan out the attributes, including data type, range of values, specific values, and UI display method. These tables show the planning for this example.

### *Physical Characteristics Attribute Group*

Attribute	Data Type	Values Range	Values	Display	Required
Eye Color	Character	None	<ul style="list-style-type: none"><li>• Black</li><li>• Brown</li><li>• Blue</li><li>• Green</li><li>• Violet</li></ul>	List of Values	No
Hair Color	Character	None	<ul style="list-style-type: none"><li>• Black</li><li>• Brown</li><li>• Blonde</li><li>• Gray</li><li>• Red</li><li>• Other</li></ul>	List of Values	No

### *Body Measurements Attribute Group*

Attribute	Data Type	Values Range	Values	Display	Required
Height	Number	1 - 100	None	Text	No
Weight	Number	1 - 1000	None	Text	No
Body Mass Index	Number	1 - 100	None	Text	No

2. Plan out the function and action for calculating the body mass index. This table shows the questions and answers for this example.

Question	Answer for This Example
Which attributes are functions of other attributes?	The Body Mass Index attribute is a function of the Height and Weight attributes.
What type of function is this: Java, PL/SQL, or URL?	PL/SQL.

## Procedure

1. Select Person Profiles as the entity to extend.
2. Create value sets for the attributes. This table shows what you define for this example.

Value Set Name	Data Type	Maximum Size	Validation Type	Display Type	Value Range
EyeColor	Char	6	Independent	List of Values	<Not Applicable>
HairColor	Char	6	Independent	List of Values	<Not Applicable>
Height	Number	3	None	<Not Applicable>	Minimum Value: 1 Maximum Value: 100
Weight	Number	4	None	<Not Applicable>	Minimum Value: 1 Maximum Value: 1000

This table shows what you add as specific values for the HairColor value set. You would accordingly enter values for EyeColor, based on your plan.

Value	Enabled	Sequence	Start Date
Black	Yes	1	<System date>
Brown	Yes	2	<System date>
Blonde	Yes	3	<System date>
Gray	Yes	4	<System date>
Red	Yes	5	<System date>
Other	Yes	6	<System date>

3. Create the attribute groups. This table shows what you define for this example.

Internal Name	Display Name	Multi-Row
PHYSICAL_CHAR	Physical Characteristics	No
BODY_MEASURE	Body Measurements	No

Add attributes to each group, as presented in these tables.

**Attributes in Physical Characteristics Attribute Group**

Internal Name	Display Name	Sequence	Data Type	Column	Enabled	Required	Display As	Value Set Name	Default Value
EYE_COLOR	Eye Color	1	Char	C_EXT_ATTR1	Yes	No	Text Field	EyeColor	Brown
HAIR_COLOR	Hair Color	2	Char	C_EXT_ATTR2	Yes	No	Text Field	HairColor	Brown

**Attributes in Body Measurements Attribute Group**

Internal Name	Display Name	Sequence	Data Type	Column	Enabled	Required	Display As	Value Set	Default Value
HEIGHT	Height	1	Number	N_EXT_ATTR1	Yes	No	Text Field	Height	<None>
WEIGHT	Weight	2	Number	N_EXT_ATTR2	Yes	No	Text Field	Weight	<None>
BMI	Body Mass Index	3	Number	N_EXT_ATTR3	Yes	No	Text Field	<None>	<None>

4. Create a function to calculate the body mass index.
  1. Write the custom PL/SQL for the calculation. For this example:

```

PACKAGE XX_EXT_TEST AS
  FUNCTION CALC_BMI
    (p_weight in NUMBER,
     p_height in NUMBER)
  RETURN NUMBER;
END XX_EXT_TEST;

PACKAGE BODY XX_EXT_TEST AS
  FUNCTION CALC_BMI
    (p_weight in NUMBER,
     p_height in NUMBER)
  RETURN NUMBER
  IS
    l_bmi number;
  BEGIN
    l_bmi := trunc((p_weight*703) / (p_height*p_height));
    dbms_output.put_line('BMI = '||l_bmi); -- for testing
    return l_bmi;
  END;
END XX_EXT_TEST;

```

2. Run the PL/SQL package in your custom schema and create a synonym for this package in the APPS schema.
3. Define the function in the extensions administration.
  - **Internal Name:** CALC\_BMI
  - **Display Name:** Calculate BMI
  - **Function Type:** PL/SQL
  - **Package:** XX\_EXT\_TEST
  - **Procedure:** CALC\_BMI
4. Enter function parameters as shown in this table.

Sequence	Internal Name	Display Name	Data Type	Parameter Type
1	p_weight	Weight	Number	Input
2	p_height	Height	Number	Input
3	x_bmi	Body Mass Index	Number	Return Value

5. Add both attribute groups and associate them with the Person Profiles data level. For the Body Measurements attribute group, create an action for calculating the body mass index:
  - **Sequence:** 1
  - **Action Name:** Calculate BMI
  - **Function:** Calculate BMI
  - **Execution Method:** User Action

- **Display Style:** Button
- **Prompt Application:** Customers Online
- **Prompt Message Name:** XX\_CALC\_BMI\_MSG

**Note:** You need to define the message to use as the prompt, in this case, the text that appears on the button. See: *Define Your Messages, Oracle Applications Developer's Guide*.

- **Visible:** Yes

**Important:** The PLM security privileges are not used for extending TCA attributes.

Map the function parameters to attributes, as shown in this table.

Parameter Name	Mapped To	Mapped Attribute
Weight	Attribute Group	Weight
Height	Attribute Group	Height
Body Mass Index	Attribute Group	Body Mass Index

6. Create a page and assign both attribute groups to it. For this example, you enter:
  - **Display Name:** Person Physical Information
  - **Internal Name:** PERSON\_PHYSICAL\_INFO
  - **Sequence:** 10
  - **Data Level:** Person Profiles
  - **Attribute Groups**
    - **Sequence:** 10, **Display Name:** Physical Characteristics
    - **Sequence:** 20, **Display Name:** Body Measurements

## Related Topics

Administering Extensions, page 9- 1

Extensions Process, page 9- 2

## Copying Extensions Data for Profile Versioning

Use the Copy Organization Extensions Data for Profile Versioning and Copy Person Extensions Data for Profile Versioning programs to synchronize organization or person profile extensions with the corresponding party profile records.

If the HZ: Profile Version Method for Updates profile option is set to *New Version* or *One Day Version*, when party profiles are updated, the existing profile record can be set with an end date, and a new profile record created with the newly entered information. In the extensions tables, the programs copy extensions data associated with the old profile ID and create new rows associated with the new profile record.

For example, the old organization profile ID is 123, and there are five rows in the HZ\_ORG\_PROFILES\_EXT tables with extended attribute values for that profile. For those five rows, the ORGANIZATION\_PROFILE\_ID column value is 123. The user updates the profile record and creates a new version with identifier 456. The extensions data, however, is still linked to record 123. When the Copy Organization Extensions Data for Profile Versioning program runs, it copies the extensions data for 123 and creates new extensions records with ORGANIZATION\_PROFILE\_ID column as 456.

If the profile option is set to *New Version* or *One Day Version*, run these programs after:

- Bulk Import, including D&B batch loading and import in Oracle Customers Online and Oracle Customer Data Librarian. See:
  - Bulk Import Overview, *Oracle Trading Community Architecture User Guide*
  - Import Overview, *Oracle Customers Online User Guide*
  - Import Overview, *Oracle Customer Data Librarian User Guide*
- Running Customer Interface. See: Customer Interface, *Oracle Receivables User Guide*.
- Running the Third Party Data Integration Update program. See: Third Party Data Integration Update Program, page 10-17.
- You update party profiles with other methods and notice that the extensions data is not synchronized.

You do not need to run these programs when party profiles are directly updated through the user interface in any application.

## Prerequisites

- Set the HZ: Profile Version Method for Updates profile option to *New Version* or *One Day Version*. See: General Profile Options, page B-3 .
- Set up extended attributes for organization or person profiles. See: Extensions Process, page 9-2 .

## Program Parameters

- **Batch Size:** Enter the number of records to process at one time.
- **Number of Workers:** Enter the number of parallel workers that you want to use for this program. Workers are processes that run at the same time to complete a task that would otherwise take longer with a single process.

## Related Topics

Administering Extensions, page 9-1

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## Source System Management

This chapter describes administering Source System Management, including source systems, Single Source of Truth, and data security for Other entities.

This chapter covers the following topics:

- Source System Management Overview
- Administering Source System Management
- Source Systems Overview
- Administering Source Systems
- Single Source of Truth Overview
- Administering Single Source of Truth
- Data Security for Other Entities

### Source System Management Overview

Use Source System Management (SSM) to manage source systems that provide data for the TCA Registry, and determine how that data is displayed and used. The key features of SSM are:

- **Source Systems:** Define the source systems you use to import data into the TCA Registry. The definition not only enables tracking between a TCA record and its data sources, but also provides operational links whereby updates can be sent and received in both directions between the TCA record and the source systems.

See: Source Systems Overview, page 10- 2 .

- **Single Source of Truth (SST):** Data from multiple content sources, including source systems and end users, can coexist in the TCA Registry. Set up the SST record, in which attribute values within a record can come from different data sources. Oracle applications display and use the SST record for party profile entities. For the SST record, you also define privileges for users to overwrite data from source systems, and for source systems to overwrite user-entered data.

See: Single Source of Truth Overview, page 10- 6 .

- **Security for Other Entities:** Define user privileges to create user-entered records and update data from source systems. These rules apply only to specific entities other than those used in SST.

See: Data Security for Other Entities, page 10-18.

## Related Topics

Administering Source System Management, page 10- 2

Introduction to Administration, page 1- 1

## Administering Source System Management

**Tip:** You should perform these administration steps when no users are logged into Oracle Applications. It is recommended that you do not frequently change the setup.

### Prerequisites

- Perform the necessary technical and functional implementation to use your source systems with the TCA Registry. For example, to use D&B as a source system, you must integrate with D&B. See: [Setting Up Third Party Data Integration](#), page 2-12.
- 1. Define the source system. See: [Creating and Updating Source Systems](#), page 10- 5 .
- 2. If you have at least one source system enabled for Single Source of Truth, set up display rules to determine the SST record. See: [Setting Up Display Rules](#), page 10-16.
- 3. Run the Third Party Data Integration Update program to regenerate the SST record. See: [Third Party Data Integration Update Program](#), page 10-17.
- 4. Define user privileges to overwrite data from source systems in the SST record. See: [Setting Up User Overwrite Rules](#), page 10-17.

**Note:** Perform this step only for attributes that have display rules with the Rank method and at least one source system ranked above User Entered.

Assign user overwrite rules using the HZ: User Overwrite Rules profile option. See: [Setting Profile Options](#), page B- 1 .

- 5. Whether you have source systems enabled for SST or not, you can define user privileges to create and update data in Other entities. See: [Setting User Create and Update Rules](#), page 10-18.

Assign user create and update rules using the HZ: User Create and Update Rules for Other Entities profile option. See: [Setting Profile Options](#), page B- 1 .

- 6. Ask your system administrator to restart Apache or the Web server after you perform any of the setup steps so that your changes take effect.

## Related Topics

Source System Management Overview, page 10- 1

## Source Systems Overview

Source System Management maintains references between the TCA Registry and any defined source system, such as a legacy or third party system, that loads data into the Registry. The source ID, or ID of the record in that external system, is mapped to the Registry ID of the TCA record, such as the party or contact point.

For example, you load a record with the ID 12345 from the Gorman system into the TCA Registry. That record is assigned the Registry ID 100 in the TCA Registry. The source ID, 12345, is referenced to Registry ID 100.

**Note:** By defining source systems, you ensure that when you load data from that system, a mapping record is created to maintain the reference between the source ID and the Registry ID.

Source System Management allows multiple source system references to one Registry ID. Examples of TCA entities that support multiple source references include the Party, Location, and Customer Account entities. The mappings can be between one Registry ID and source IDs from multiple source systems, or, if enabled, between one Registry ID and multiple source IDs from the same source system.

For example, Registry ID 100 is mapped to source ID 12345 from the Gorman system and source ID 99999 from the Elcaro system. If multiple references from the same source is allowed for the entity, Registry ID 100 can be mapped to source IDs 12345 and 67890 from the same Gorman system.

By mapping the IDs from the sources of your customer data to the TCA Registry IDs, your source systems can continue to operate, sending updates to and receiving updates from TCA. This operational mapping between the TCA Registry and multiple source systems allows you to:

- Consolidate multiple customer databases, stored in various applications across different platforms, into the TCA Registry.
- Create, maintain, share, and leverage an operational, single view of your customer information, or customer hub, across your enterprise.

## Related Topics

Administering Source Systems, page 10- 4

Source System Management Overview, page 10- 1

## Source Systems Example

This example shows how you can implement and use source systems.

1. You define a source system, for example, Gorman.
2. You load data from an external system into the TCA Registry, specifying both the source system name and source ID.

For example, you load a record for a party named Joe Smith from Gorman. You specify that the source system name is Gorman and that the source ID, or ID of Joe Smith in Gorman, is 12345.

**Note:** If you specify only the source ID, the mapping is only inserted for customer account level entities with unique references, with the source system name defaulted to UNKNOWN.

3. Users of an application that has implemented SSM can specify the source system name and source ID when they create or update records in the TCA Registry. They can also query records in the Registry using the source system name and source ID.

For example, the user enters a record for the party named Joe Smith and specify that the source system is Gorman and the source ID is 12345. Then, the user can query for Joe Smith using 12345 as the source ID and Gorman as the source system name.

4. You can encounter additional situations, for example:

- When a source system is no longer used to provide data to one or more entities, you update the source system definition from Step 1 to indicate that the source system is inactive.

This inactivation prevents additional mapping records from being created for that source system and all TCA entities. Existing mappings to the source system remain active.

For example, you do not want to continue maintaining mappings between the Gorman source system and the TCA Registry for any new loaded data. You inactivate the Gorman system. The mappings between the Joe Smith record in the TCA Registry and the Joe Smith record in Gorman remain untouched.

- When a party record is inactivated in the source system, the reference between the source ID and the Registry ID is not affected.

For example, the Joe Smith record in the Gorman system is inactivated. The mapping between Gorman 12345 and Joe Smith's Registry ID remains unchanged.

- When a party record is inactivated in the TCA Registry, the reference between the source ID and the Registry ID is not affected. A BES callout for the party record inactivation is raised and applications that subscribe to the event are notified of the inactivation.

For example, the Joe Smith record in the HZ\_PARTIES table is inactivated. The mapping between Gorman 12345 and Joe Smith's Registry ID remains unchanged. A BES callout from HZ\_PARTIES is raised due to the inactivation, notifying subscribing applications.

## Related Topics

Source Systems Overview, page 10- 2

## Administering Source Systems

To administer source systems, you can:

- Set up flexfields to store additional information, page 10- 5 .
- Create and update source systems, page 10- 5 .
- View source system definitions, page 10- 6 .

Source systems can be one of these types:

- **Spoke:** A spoke system, such as a legacy system.
- **Purchased:** A third party data provider, such as D&B, that you need to purchase data from.

Source system references are maintained only for active source systems. Only source systems defined as enabled for Single Source of Truth are available to provide data for the SST record. See: Single Source of Truth Overview, page 10- 6 .

## Related Topics

Source Systems Overview, page 10- 2

## Setting Up Flexfields for Source Systems

The HZ\_ORIG\_SYS\_MAPPING table stores information about source systems and the TCA entities that the systems can provide data for. The HZ\_ORIG\_SYSTEM\_REFERENCES table stores information about the references between source IDs and TCA Registry IDs.

For both tables, you can set up flexfields to store additional information. Flexfields are additional data fields that can be customized for your organization's business needs. See: Overview of Setting Up Flexfields, *Oracle Applications Flexfields Guide*.

## Flexfields for Defining Entities

If flexfields in the HZ\_ORIG\_SYS\_MAPPING table are set up, you can enter flexfield values when you define entity settings as part of creating or updating source systems.

For example, you set up a First Import Date flexfield to store the date when the source system is first used to import data. You then create a source system, select First Import Date for additional details, and enter a date for specific entities. See: Creating and Updating Source Systems, page 10- 5 .

## Related Topics

Administering Source Systems, page 10- 4

## Creating and Updating Source Systems

### Source System Header

When you define the source system, you can enter the same value for the source system name and code. The code is used in the mapping records, for references between source IDs and Registry IDs. Users should enter the source system code when they load data into the TCA Registry. Source system codes are used to query mapping records.

**Important:** You cannot update the source system code or type after you first define them.

You can specify the status of the source system only when you update, not create, it.

### Single Source of Truth

See: Single Source of Truth Overview, page 10- 6 .

### Enabled Entities

The source system can provide data for all displayed entities. Optionally select the type of additional details to enter for the entities. Aside from the seeded Source System Table Name, other additional details are available if flexfields are set up. See: Flexfields for Defining Entities, page 10- 5 .

**Note:** For any entity, you cannot allow multiple references from the D&B source system to one TCA record.

## Related Topics

Administering Source Systems, page 10- 4

## Viewing Source Systems

The overview provides information about the source system and settings for entities. You can update most of this information. See: Creating and Updating Source Systems, page 10- 5 .

## Related Topics

Administering Source Systems, page 10- 4

## Single Source of Truth Overview

Data from source systems coexist with user-entered data as separate records in the TCA Registry. For the party profile entities, Organization Profile and Person Profile, you can set up a Single Source of Truth (SST) record for a single view of the most accurate party profile information across data sources. The attributes in the SST record can contain information from different data sources, depending on the defined display rules.

**Note:** If the TCA Registry does not contain data from source systems, then you do not need to set up Single Source of Truth.

Oracle applications display and use the Single Source of Truth record for organization and person party profile information. If SST is not set up, or if the setup does not allow for data from source systems, then Oracle applications always use the user-entered information.

**Note:** Even though source system data, for example all purchased data from D&B, are stored in TCA tables, some information might not appear in user interfaces, based on SST display rules.

## Display Rules

Display rules determine how the Single Source of Truth record gets its attribute values. For each attribute, you define the rule based on a display method:

- **Rank:** Attribute value is from the highest ranked data source that contains data.

For example, D&B is ranked as the highest source for the DUNS Number attribute, followed by user entered. For party 1, if both D&B and user-entered records have a DUNS Number attribute value, then the SST record takes the value from D&B. If party 2 has only a user-entered record, then the user-entered DUNS Number is used.

**Note:** If no data source has a value for a specific attribute, Oracle applications display nothing and the user can enter a value for that attribute.

- **Date:** Attribute value is from the data source with the most recently updated value.

For each party in the TCA Registry, Oracle applications uses the SST display rule for each attribute to determine the value to display in user interfaces.

## Overwrite Rules for Attributes with Rank Method

To maintain accurate information in the TCA Registry, you can define rules that control data overwrite in the SST record. Overwrite rules do not apply to attributes defined with the Date display method.

**Note:** Only source systems ranked higher than User Entered can be included in these rules.

- **User overwrite rules:** Determine user privileges to overwrite data from source systems in the SST record.

For example, data sources are ranked as follows for the Last Name attribute:

1. D&B
2. User Entered
3. Gorman

For a specific party, the user-entered value is *Smyth*, and the D&B value is *Smith*. Due to the ranking, *Smith* is used as the SST value in Oracle applications.

Only D&B, ranked higher than User Entered, is available for user overwrite rules, and a rule is defined to allow users to overwrite last names from D&B. If this rule is assigned to Joe, then he can overwrite the SST last name *Smith* with *Smythe* in an Oracle application. The user-entered and SST records now have *Smythe*, and the D&B record remains with *Smith*.

**Important:** If a user is not assigned to a user overwrite rule, then the default behavior allows him to overwrite all SST values, even those from a data source ranked higher than User Entered. To enforce the data source ranking, you must create and assign a user overwrite rule that prevents overwrite of all data sources ranked higher than User Entered.

For example, you can create one user overwrite rule that prevents overwrite of all data sources, for all attributes with the Rank display method. Essentially, the rule mirrors and enforces the display rule for all those attributes. Assign this rule to the site level, so that it applies to all users by default. For the above example, this rule would prevent overwrite of D&B values for the Last Name attribute.

If you want to allow overwrite for specific users, you can then define additional user overwrite rules as desired, and assign the rules at the user or responsibility level. For the above example, you would create a rule that allows overwrite of last names from D&B, and assign the rule to Joe or his responsibilities.

- **Source system overwrite rules:** Determine which source systems can provide new data and overwrite existing user-entered data in the SST record. The rules apply only to user-entered data that previously overwrote source system data, according to user overwrite rules.

For example, Joe has overwritten the D&B value for the Last Name attribute in the SST record, as the user overwrite rule assigned to him allows. Only D&B, ranked higher than User Entered, is available for the source system overwrite rule, and the rule for Last Name grants D&B overwrite privileges.

If a new last name, *Smeeth*, is acquired from D&B for that party, then *Smeeth* will overwrite Joe's value, *Smythe* in the SST record, and replace *Smith* in the D&B record. The user-entered record with *Smythe* is untouched.

If source system overwrite is not allowed for D&B, then *Smeeth* replaces only *Smith* in the D&B record. The SST and user-entered record remain with *Smythe*.

**Note:** The source system value does not overwrite the user-entered value if the source system value has not changed, for example, if the newly acquired D&B data still has *Smith* as the last name.

## Related Topics

Attribute Groups, page 10- 8

Single Source of Truth Example for Rank Display Method, page 10- 9

Administering Single Source of Truth, page 10-15

Source System Management Overview, page 10- 1

## Attribute Groups

Some of the attributes in the party profile entities are grouped and displayed together, separated by slashes, for example *CEO Name / CEO Title*. You apply the same display and overwrite rules to the entire group.

Each attribute group has a primary attribute. When the Single Source of Truth record is regenerated after you run the Third Party Data Integration Update program, all nonprimary attributes in each group are populated from the same data source as their primary attribute, even if that source gives the nonprimary attributes a null value. See: Third Party Data Integration Update Program, page 10-17. This functionality applies to both the Rank and Date display methods.

If the highest ranked source has no data for the primary attribute, then the SST record takes the value from the next highest ranked source that does. If none of the data sources has data for the primary attribute, the other attributes in the group are treated like regular individual attributes in the SST record.

Even though the same overwrite rule applies to the entire group, an attribute can be updated without requiring the other attributes in the group to be also updated by the same data source.

**Important:** The SIC Code and SIC Type group has additional validations. These attributes must always have values from the same data source, and both must have values or none at all.

The SST record uses the data source that meets both of these requirements:

- Is the highest ranked or has the last updated value for the primary SIC Code attribute
- Has values for both attributes

## Organization Profile Attribute Groups

This table shows the Organization Profile attribute groups, including the primary attributes and the other attributes in each group.

<b>Primary Attribute</b>	<b>Other Attributes in Group</b>
CEO Name	CEO Title
DUNS Number	Displayed DUNS Party Identifier Enquiry DUNS Number
Headquarters or Branch Indicator	Branch Indicator
Local Activity Code	Local Activity Code Type
Local Business Identifier	Local Business Identifier Type
Minority Owned Indicator	Minority Owned Type
Organization Name	Phonetic Organization Name
Principal Name	Principal Title
SIC Code	SIC Code Type

### Person Profile Attribute Groups

This table shows the Person Profile attribute groups, including the primary attributes and the other attributes in each group.

<b>Primary Attribute</b>	<b>Other Attributes in Group</b>
Person Identifier Number	Person Identifier Type

### Related Topics

Attribute Groups Example for Rank Display Method, page 10-13

Single Source of Truth Overview, page 10- 6

### Single Source of Truth Example for Rank Display Method

This example shows how the Single Source of Truth setup for some party profile attributes affect the functionality in Oracle applications. Some of these attributes are primary attributes that belong to attribute groups, but the example treats the primary attributes as if on their own. For an example of attribute group setup, see: Attribute Groups Example for Rank Display Method, page 10-13.

#### Display Rules

For the Organization Profile entity, you set up display rules with the Rank method for the attributes shown in this table. This table also shows the available records for a specific party and the values that populate the Single Source of Truth record based on the setup.

Attribute	Data Source Ranking	User-Entered Value	D&B Value	SST Value
Organization Name	1. D&B 2. User Entered	Company A	Company A	Company A
Year Established	1. D&B 2. User Entered	1992	1990	1990
CEO Name	1. D&B 2. User Entered	Joe Lee	<Not Available>	Joe Lee
Total Employees	1. User Entered 2. D&B	<Not Available>	100	100
SIC Code	1. User Entered 2. D&B	2520	2521	2520

### User Overwrite Rule

This table shows a user overwrite rule for the five attributes.

Attribute	Source Systems That Users Can Overwrite
Organization Name	<None.>
Year Established	D&B.
CEO Name	D&B.
Total Employees	<None. The rule cannot be defined because D&B is not ranked higher than User Entered.>
SIC Code	<None. The rule cannot be defined because D&B is not ranked higher than User Entered.>

### User Enters Data

This table describes what happens when a user, who is assigned the above user overwrite rule, tries to enter data. The table shows the SST values from above, the data sources of each value, the highest ranked data sources, as well as the new user-entered values and the new SST values, whether the user updated them or not.

Attribute	Highest Ranked Data Source	Current SST Data Source	Current SST Value	New User Entered Value	New SST Value
Organization Name	D&B	D&B	Company A	Company B	Company A
Year Established	D&B	D&B	1990	1992	1992
CEO Name	D&B	User Entered	Joe Lee	Joey Lee	Joey Lee
Total Employees	User Entered	D&B	100	1000	1000
SIC Code	User Entered	User Entered	2520	2522	2522

The user overwrite rule applies only to attribute values that have D&B as the current SST and highest ranked data source. This table describes which attributes the rule applies to.

Attribute	Rule Definition	Rule Is Applied	Description
Organization Name	Prevent Overwrite	Yes	The user overwrite rule prevents the user-entered value from overwriting the highest ranked D&B value in SST record.
Year Established	Allow Overwrite of D&B	Yes	The user overwrite rule allows the user-entered value to overwrite the highest ranked D&B value.
CEO Name	Allow Overwrite of D&B	No	The current SST data source is already user entered, and data still does not exist for the highest ranked D&B source, so the user can modify the user-entered record and accordingly update the SST record, regardless of the user overwrite rule.
Total Employees	Prevent Overwrite	No, D&B is not ranked higher than User Entered, so the rule is not defined	Even though the current SST value is from D&B, the user can overwrite it because user entered is the highest ranked source.
SIC Code	Allow Overwrite of D&B	No, D&B is not ranked higher than User Entered, so the rule is not defined	The current SST data source is already user entered, and the highest ranked source is user entered, so the user can definitely update the SST value.

### Source System Overwrite Rule

This table shows the source system overwrite rule for the five attributes.

Attribute	Source Systems That Can Overwrite User-Entered Data
Organization Name	<None>
Year Established	D&B
CEO Name	<None>
Total Employees	<None. The rule cannot be defined because D&B is not ranked higher than User Entered.>
SIC Code	<None. The rule cannot be defined because D&B is not ranked higher than User Entered.>

### New D&B Data is Acquired

This table shows what happens when D&B data is subsequently acquired. The table shows the SST values from above, the data sources of each value, the previous data sources, the highest ranked data sources, as well as the new D&B values and the new SST values, whether D&B updated them or not.

Attribute	Highest Ranked Data Source	Previous Data Source	Current SST Data Source	Current SST Value	New D&B Value	New SST Value
Organization Name	D&B	D&B	D&B	Company A	Company AA	Company AA
Year Established	D&B	D&B	User Entered	1992	1991	1991
CEO Name	D&B	User Entered	User Entered	Joey Lee	Joseph Lee	Joseph Lee
Total Employees	User Entered	D&B	User Entered	1000	2000	1000
SIC Code	User Entered	User Entered	User Entered	2522	2520	2522

The third party overwrite rule applies only to attributes that have a current user-entered value that previously overwrote a highest ranked D&B value. This table describes which attributes the rule applies to.

Attribute	Rule Definition	Rule Applies	Description
Organization Name	Prevent Overwrite	No	The SST record always had a D&B value, which is highest ranked, so the new D&B value updates the SST record.
Year Established	Allow D&B to Overwrite	Yes	The current user-entered value previously overwrote a highest ranked D&B value in the SST record. The rule allows the new D&B value to overwrite the user-entered value.
CEO Name	Prevent Overwrite	No	Even though the current SST value is user entered and the highest ranked source is D&B, the current SST value did not previously overwrite a D&B value. The new D&B value can overwrite the user-entered value because D&B is the highest ranked source.
Total Employees	Prevent Overwrite	No, D&B is not ranked higher than User Entered, so the rule is not defined	Even though the current SST value is user entered and previously overwrote a D&B value, D&B is not the highest ranked source. The new D&B value cannot overwrite the user-entered value because the highest ranked source is user entered.
SIC Code	Prevent Overwrite	D&B is not ranked higher than User Entered, so the rule is not defined	The SST record always had a user-entered value, which is highest ranked, so the new D&B value cannot update the SST record.

### Attribute Groups Example for Rank Display Method

This example shows how attribute groups in the SST record are populated and subsequently updated. For more information, see: Attribute Groups, page 10- 8 .

#### Example

This table shows the primary attribute and the other attribute in the group.

Primary Attribute	Other Attribute in Group
CEO Name	CEO Title
SIC Code	SIC Code Type

#### Display Rules

This table shows the available records for a specific party and the values that populate the Single Source of Truth record based on display rules with the Rank method. The setup for the primary attribute determines the setting for the other attribute in the group.

Attribute	Data Source Ranking	User-Entered Value	D&B Value	SST Value
CEO Name	1. D&B 2. User Entered	Jennie Lee	Jennifer Lee	Jennifer Lee
CEO Title	1. D&B 2. User Entered	CEO	<Not Available>	<None>
SIC Code	1. User Entered 2. D&B	<Not Available>	2952	2952
SIC Code Type	1. User Entered 2. D&B	<Not Available>	1977 SIC	1977 SIC

Primary attributes in the SST record are populated like individual attributes, but the other attributes in the group are populated based on the primary attributes' data source. For example, the CEO title attribute takes the D&B value, which is nothing, because the primary attribute, CEO name, takes a D&B value.

**Important:** The SIC Code and SIC Type group has additional validations. At all times, they both must have values from the same data source or none at all.

#### User Overwrite Rule

This table shows a user overwrite rule for the four attributes. The setup for the primary attribute determines the setting for the other attribute in the group.

Attribute	Source Systems That Users Can Overwrite
CEO Name	D&B
CEO Title	D&B
SIC Code	<None>
SIC Code Type	<None>

#### User Enters Data

This table describes what happens when a user, who is assigned the above user overwrite rule, tries to enter data. The table shows the SST values from above, the data sources of each value, the highest ranked data sources, as well as the new user-entered values and the new SST values, whether the user updated them or not.

Attribute	Highest Ranked Data Source	Current SST Data Source	Current SST Value	New User Entered Value	New SST Value
CEO Name	D&B	D&B	Jennifer Lee	<No Action>	Jennifer Lee
CEO Title	D&B	D&B	<None>	CEO	CEO
SIC Code	User Entered	D&B	2952	2999	2999
SIC Code Type	User Entered	D&B	1977 SIC	1987 SIC	1987 SIC

The user overwrite rule applies only to attribute values that have D&B as the current SST and highest ranked data source. This table describes which attributes the rule applies to and how attributes within a group can be updated separately except for the SIC code and type group.

Attribute	Rule Definition	Rule Applies	Description	New SST Data Source
CEO Name	Allow Overwrite of D&B	Yes	The user does nothing and leaves the D&B value in the SST record.	D&B
CEO Title	Allow Overwrite of D&B	Yes	Even though the primary attribute, CEO name, is still a D&B value, the user can overwrite the D&B CEO title in the SST record.	User Entered
SIC Code	Prevent Overwrite	No	Even though the current SST value is from D&B, the user can overwrite it because user entered is the highest ranked source.	User Entered
SIC Code Type	Prevent Overwrite	No	The user must also overwrite the D&B SIC code type in the SST record because SIC code and type must always have the same data source.	User Entered

## Administering Single Source of Truth

To administer Single Source of Truth:

- Define and update display rules for Organization Profile and Person Profile entities. See: *Setting Up Display Rules*, page 10-16.
  - If the display method is Rank, you can define source system overwrite rules for the same attributes that you define display rules for.
  - For display rules changes to take effect, you must run the Third Party Data Integration Update program. You can run the program immediately after defining display rules, or submit the program at any time. See: *Third Party Data Integration Update Program*, page 10-17.
- Define and update user overwrite rules. See: *Setting Up User Overwrite Rules*, page 10-17.

## Related Topics

Single Source of Truth Overview, page 10- 6

## Setting Up Display Rules

To define Single Source of Truth display and source system overwrite rules:

1. View attributes for the entity you want to work on.
2. Select the attributes to update display rules for.  
You can define the same rule for all or some attributes, or use a different rule for every attribute.
3. Select the SST display method.
4. Select data sources. See: Selecting Data Sources, page 10-16.
5. For the Rank display method, also define the source system overwrite rule. See: Overwrite Rules for Attributes with Rank Method, page 10- 7 .
6. Run the Third Party Data Integration Update program. See: Third Party Data Integration Update Program, page 10-17.

**Note:** Multiple attributes separated by slashes belong to the same attribute group. The same display and source system overwrite rules apply to all attributes in the group. See: Attribute Groups, page 10- 8 .

## Selecting Data Sources

Select data sources for either the Rank or Date display method.

**Note:** For both methods, the User Entered data source must always be selected for SST.

For the Rank method, you must also rank the selected sources.

## Ranking Data Sources (Rank Display Method Only)

For the data source ranking, only sources in the Ranked Data Sources box are considered for the Single Source of Truth record, with the uppermost as the highest ranked.

The ranking not only determines the SST attribute values, but also:

- Which source systems can potentially overwrite user-entered data in the SST record. For the selected attributes, you can define the source system overwrite rule only with systems ranked higher than User Entered.
- The overwrite rule between source systems for the selected attributes. For example, for DUNS Number, D&B is ranked above the Gorman legacy system, and the SST record currently has a DUNS Number from Gorman. If you later acquire a DUNS Number from D&B for this party, then the D&B value overwrites the Gorman value in SST because D&B is ranked higher.

## Related Topics

Creating and Updating Source Systems, page 10- 5

Administering Single Source of Truth, page 10-15

Single Source of Truth Overview, page 10- 6

## Third Party Data Integration Update Program

Use the Third Party Data Integration Update program to regenerate the Single Source of Truth record for all parties in the TCA Registry. The new SST values are based only on the display rules and the existing availability of data. It does not matter which data sources the current SST values come from, and none of the overwrite rules apply.

Run this program at the end of the display rule update process, or at a later time from Standard Request Submission. Your display rule changes do not take effect in Oracle applications until you run this program.

**Note:** You do not need to run this program after updating only overwrite rules. Updated overwrite rules automatically apply to new records, user actions, or data import from source systems.

### Prerequisite

Define display rules for the first time or update display rules. See: Setting Up Display Rules, page 10-16.

### Program Parameters

- **Commit Size:** Enter the number of new or updated records to be included in each commit to the database.
- **Number of Workers:** Enter the number of parallel workers that you want to use for this program. Workers are processes that run at the same time to complete a task that would otherwise take longer with a single process.

## Setting Up User Overwrite Rules

Define as many user overwrite rules as needed. Each rule includes all attributes from the party profile entities. You can give the same setting to all or some attributes, or use a different setting for every attribute. See: Overwrite Rules for Attributes with Rank Method, page 10-7 .

**Note:** Multiple attributes separated by slashes belong to the same attribute group. The same user overwrite privilege applies to all attributes in the group. See: Attribute Groups, page 10-8 .

**Note:** A seeded rule specifies that the user can never overwrite a DUNS Number from the D&B data source. You cannot modify this rule, and the DUNS Number attribute is not available for you to include in other user overwrite rules.

Use the HZ: User Overwrite Rule profile option to assign rules. See: Setting Profile Options, page B-1 . If you are assigning only at the site level, you need to define only one user overwrite rule. If you do not define nor assign any rules, the default functionality allows user overwrite of all attributes.

You can delete user overwrite rules at any time. If you delete a rule that is assigned to users, the rule from the next assigned level would then apply to these users. For example, rules are assigned at the user, application, and site levels. If you delete the user level rule, the application level rule takes effect.

## Related Topics

Administering Single Source of Truth, page 10-15

Single Source of Truth Overview, page 10- 6

## Data Security for Other Entities

Other entities are entities other than the party profile entities used in Single Source of Truth. This table maps the Other entities to their relevant tables.

Other Entity	Table
Address	HZ_LOCATIONS and HZ_PARTY_SITES
Contact Point	HZ_CONTACT_POINTS
Credit Rating	HZ_CREDIT_RATINGS
Financial Report	HZ_FINANCIAL_REPORTS and HZ_FINANCIAL_NUMBERS
Relationship	HZ_RELATIONSHIPS

User create and update rules determine user privileges to create new data for each Other entity, and to update Other entity data from source systems. Even if no data currently exists for an Other entity, users cannot create data for that entity if their assigned rule prevents it. Users can always update existing user-entered records for all Other entities.

**Note:** For location-based tax validation purposes, an address cannot be updated when transactions are associated with the address, or party site. When you acquire new address information from source systems, if the new address significantly differs from the existing address, the old address would be deactivated. The new, active third party address replaces the previous address for the party site.

## Related Topics

Source System Management Overview, page 10- 1

Administering Source System Management, page 10- 2

## Setting Up User Create and Update Rules

Define as many user create and update rules as needed. Each rule includes all Other entities, and you set create and update privileges at the entity level.

Use the HZ: User Create and Update Rule for Other Entities profile option to assign rules. See Setting Profile Options, page B- 1 . If you are assigning only at the site level, you need to define only one user create and update rule. If you do not define nor assign any rules, the default functionality for all Other entities allows users to create data and but not to update any source systems data.

You can delete rules at any time. If you delete a rule that is assigned to users, the rule at the next assigned level would then apply to these users. For example, rules are

assigned at the user, application, and site levels. If you delete the user level rule, the application level rule takes effect.

### **Related Topics**

Data Security for Other Entities, page 10-18



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## Certification

This chapter describes administering certification, including managing certification levels and reasons.

This chapter covers the following topics:

- Administering Certification

### Administering Certification

Certification is used to classify parties by standards that your organization sets. You can assign certification levels to parties of type Organization or Person. These levels can be used, for example, in search results to determine which party records are better qualified, given equal match scores.

Along with the level, a corresponding certification reason can also be assigned to indicate why the party is assigned a specific level. Each party can have only one certification level and reason.

Oracle Trading Community Architecture provides seeded certification levels and reasons for assignment. You can, however, use the following Receivables lookups to manage levels and reasons, including modifying the seeded values or adding new ones.

- HZ\_PARTY\_CERT\_LEVEL for certification levels
- HZ\_PARTY\_CERT\_REASON for certification reasons

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

You can assign certification levels and reasons to parties using only Oracle Customer Data Librarian. See: Assigning Certifications, *Oracle Customer Data Librarian User Guide*.

To display certification levels in Oracle E-Business Suite applications that implemented certification, set the HZ: Display Certification Level profile option to *Yes*. See Certification Profile Option, page B-15.

### Related Topics

Introduction to Administration, page 1- 1



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## Reports and Processes

This section lists the reports and processes, including relevant request sets, that are seeded in Standard Request Submission for the Trading Community Manager responsibility.

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

### Reports

#### **Customer Listing - Detail**

Provides detail information about customers. See: Customer Listing Detail and Summary Reports, *Oracle Receivables User Guide*.

#### **Customer Listing - Summary**

Provides summary information about customers. See: Customer Listing Detail and Summary Reports, *Oracle Receivables User Guide*.

#### **Customer Profiles Report**

Provides customer profile information for customers or customer sites. See: Customer Profiles Report , *Oracle Receivables User Guide*.

#### **Customer Relationships Listing**

Provides customer relationships information. See: Customer Relationships Listing, *Oracle Receivables User Guide*.

#### **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*.

#### **Duplicate Customer Report**

Lists possible duplicate customers. See: Duplicate Customer Report, *Oracle Receivables User Guide*.

## **Duplicate DUNS Report**

Lists parties in the TCA Registry with the same DUNS Number. See: Duplicate DUNS Report, *Oracle Trading Community Architecture User Guide*.

## **HZ Upgrade Script Report**

Provides details on scripts that were run during upgrade. See: HZ Upgrade Script Report, *Oracle Trading Community Architecture Administration Guide*.

## **Import Batch De-Duplication Report**

Provides batch de-duplication results, or a preview if you run it before the actual import. See: Import Batch De-Duplication Report, *Oracle Trading Community Architecture User Guide*.

## **TCA Import Error Report**

Displays errors from bulk imports. See: Resolving Import Errors, *Oracle Trading Community Architecture User Guide*.

# **Processes**

## **Account to Party Relationships Migration Program**

Migrates account relationships to party relationships after upgrade. See: Account to Party Relationships Migration Program, *Oracle Trading Community Architecture Administration Guide*.

## **Address Validation**

Validates addresses against known or authorized data sources. See: Address Validation, *Oracle Trading Community Architecture User Guide*.

## **Automerge**

Resubmits previous Automerge processes that resulted in error. See: Automerge, *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*.

## **Create Merge Batch**

Resubmits previous merge batch creations that resulted in error. See: Creating Merge Batches, *Oracle Trading Community Architecture User Guide*.

**Customer Interface**

Imports customer and account information. See: Importing Customers Using Customer Interface, *Oracle Receivables User Guide*.

**Customer Interface Master Conc Program**

Imports customer and account information using parallel workers. See: Importing Customers Using Customer Interface, *Oracle Receivables User Guide*.

**Customer Merge**

Merges duplicate customers and account information. See: Submitting the Merge Process, *Oracle Receivables User Guide*.

**Customer text data creation and indexing**

Indexes customer account data. See: Customer Text Data Creation and Indexing, *Oracle Trading Community Architecture Administration Guide*.

**D&B Import Adapter**

Loads D&B information in batches. This is a request set. See: D&B Import Adapter, *Oracle Trading Community Architecture User 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*.

**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*.

### **Import Batch to TCA Registry**

Imports parties from interface tables into the TCA Registry. See: Import Batch to TCA Registry, *Oracle Trading Community Architecture User 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*.

### **Locations Spatial Index Rebuild**

Rebuilds the spatial index on the HZ\_LOCATIONS table. See: Locations Spatial Index Rebuild, *Oracle Trading Community Architecture Administration Guide*.

### **Party Merge**

Resubmits previous party merges that resulted in error. See: Processing Merge Batches, *Oracle Trading Community Architecture User Guide*.

### **Person Names Migration Program**

Migrates person names after upgrade. See: Person Names Migration Program, *Oracle Trading Community Architecture Administration 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*.

### **Remove Protected HR Person Data From TCA Tables**

Removes protected Oracle Human Resources person data from the TCA tables.

### **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*.

### **Spatial Information for Locations Batch Update**

Acquires latitude and longitude values for locations in the TCA Registry. See: Spatial Information for Locations Batch Update, *Oracle Trading Community Architecture User Guide*.

### **TCA Import Batch Purge**

Purges batches from the import interface tables. See: TCA Import Batch Purge, *Oracle Trading Community Architecture User Guide*.

**TCA Import Postprocessing**

Resubmits TCA Import Postprocessing runs that resulted in error. See: Postimport Processes, *Oracle Trading Community Architecture User Guide*.

**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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## Profile Options

This appendix describes the profile options that affect the operation of Oracle Trading Community Architecture.

This appendix covers the following topics:

- Setting Profile Options
- Profile Option Descriptions
- Profile Option Access and Defaults

### Setting Profile Options

During implementation, you set a value for each profile option to specify how Oracle Trading Community Architecture controls access to and processes data. See: *Overview of Setting User Profiles, Oracle Applications System Administrator's Guide*.

To set the profile options for Oracle Trading Community Architecture, see:

- Profile Option Descriptions, page B- 2
- Profile Option Access and Defaults, page B-18

**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, page 5-22*.

### Unused or Internal Profile Options

These profile options are either internally used by Oracle Trading Community Architecture or not used at all. You should not modify their settings in any way.

- HZ: Address Key Index
- HZ: Bank Branch Contact Point Validation Procedure
- HZ: Bank Branch Contact Validation Procedure
- HZ: Bank Branch Location Validation Procedure
- HZ: Bank Branch Site Validation Procedure
- HZ: Bank Branch Validation Procedure
- HZ: Bank Contact Point Validation Procedure
- HZ: Bank Contact Validation Procedure

- HZ: Bank Location Validation Procedure
- HZ: Bank Site Validation Procedure
- HZ: Bank Validation Procedure
- HZ: Banking Group Member Validation Procedure
- HZ: Banking Group Validation Procedure
- HZ: Batch Size for committing records in Geography Name Referencing process
- HZ: Clearinghouse Assignment Validation Procedure
- HZ: Created By Module
- HZ: D&B Policy Function Exists
- HZ: Display Certification Status
- HZ: DQM Index Creation Workers
- HZ: Number of workers for a given Geography Name Referencing request
- HZ: Special Characters Enabled
- HZ: Third Party Data Integration Set Up for Organization Profile Entity
- HZ: Third Party Data Integration Set Up for Person Profile Entity

## Related Topics

Introduction to Administration, page 1- 1

## Profile Option Descriptions

To set profile options for general Oracle Trading Community Architecture implementation and administration, see: General Profile Options, page B- 3 .

You can also set profile options for the following features, which are available from the Trading Community Manager responsibility.

- Adapters, page B- 5
- Address Validation, page B- 5
- Batch Duplicate Identification, page B- 6
- Bulk Import, page B- 6
- Data Quality Management, page B- 8
- Data Sharing and Security, page B-11
- eLocations Spatial Data Integration, page B-12
- Relationship Manager, page B-12
- Third Party Data Integration, page B-13

These profile options are for the Customer Interface or Customer Account Merge features:

- HZ: Audit Customer Account Merge
- HZ: Gather Table Stats

- HZ: Number of Workers Used by Customer Interface
- HZ: Location Updatable
- HZ: Log Customer Merge

See: Overview of Receivables User Profile Options, *Oracle Receivables User Guide*.

Oracle Trading Community Architecture profile options can also apply to other Oracle E-Business Suite applications that use TCA functionality.

**Note:** To determine whether you should set a profile option for the Oracle E-Business Suite applications you have, check the documentation for those applications. Even if an application uses a specific TCA feature, not all profile options listed for that feature necessarily apply to each application.

Some profile options are used only for other Oracle E-Business Suite applications that include TCA functionality. Those profile options do not affect features included for the Trading Community Manager responsibility. See: Profile Options Only for Other Applications, page B-14.

## General Profile Options

### HZ: API Debug File Directory

Specify the directory name where the file that stores API debug messages resides. The file is for all public TCA APIs and some internal APIs used in TCA.

### HZ: API Debug File Name

Specify the file name that stores API debug messages for all public TCA APIs and some internal APIs used in TCA.

### HZ: Default Address Style

Specify the default style that the Address Formatting API uses when the caller does not pass a style.

### HZ: Default Flexible Address Format

For flexfield-based address formatting, determine the default format to use if no format is assigned to the selected country. See: Flexible Addresses, *Oracle Receivables User Guide*.

### HZ: Default Name Style

Specify the style to be used to construct the PARTY\_NAME column for a person name in the HZ\_PARTIES table. This style is also the default that the Name Formatting API uses when the caller does not pass a style.

### HZ: Execute API Callouts

Determine if TCA APIs raise business events when a TCA entity is created or updated. This profile option applies to all public TCA APIs and some internal APIs used in TCA. Leaving this profile option blank is the same as setting it to *No*.

### **HZ: Generate Contact Number**

Specify whether or not TCA automatically generates a contact number when the relevant API is used or called from a user interface to create a contact for an organization.

If the profile option is set to *Yes* or left blank, then users cannot enter the contact number when creating the contact. If set to *No*, users must enter the number.

### **HZ: Generate Party Number**

Specify whether or not TCA automatically generates a Registry ID, or party number, when the relevant API is used or called from a user interface to create a party of type Organization or Person.

If the profile option is set to *Yes* or left blank, then users cannot enter the Registry ID when creating the party. If set to *No*, users must enter the number.

### **HZ: Generate Party Site Number**

Specify whether or not TCA automatically generates a party site number when the relevant API is used or called from a user interface to create a party of type Organization or Person.

If the profile option is set to *Yes* or left blank, then users cannot enter the party site number when creating the party. If set to *No*, users must enter the number.

### **HZ: Language for Country Display**

Specify the default language that the country name should be displayed in. If this profile option is left blank, then the country name is translated using the current session's NLS Language setting.

### **HZ: Name/Address Backwards Compatibility**

Determine whether existing TCA name and AR address formatting routines should use the new TCA formatting routines, or continue with the previous behavior. Enter *Yes* for new or *No* for old routines.

### **HZ: Profile Version Method for Updates**

Determine the type of person or organization profile versioning to use, if any. This profile option controls whether entering new information for an existing organization or person record updates that record, creates a new record, or only creates a new record if current system date and the last update date are different.

- **No Version:** When new data is entered about an organization or person profile, the existing organization or person profile record is updated with the new data. Entering new data does not create a new profile record.
- **New Version:** When new data is entered about an existing organization or person profile, a new organization or person profile record is created using the existing record and the newly entered data. This option is useful in environments that require the maintenance of detailed historical records, such as in healthcare applications.
- **One Day Version:** When new data is entered about an existing organization or person profile, the current system date and the last update date are compared. If these dates are the same, the existing profile record is updated. If the dates are different, a new organization or person profile record is created using the existing record and the newly entered data. This is the default behavior.

### **HZ: Reference Language**

Specify the default language used in determining the appropriate name style formats. If this profile option is left blank, then the current session's NLS Language setting is used.

### **HZ: Reference Territory**

Specify the default territory used in determining the appropriate address style format. This profile option also controls whether an address is considered domestic or foreign, for showing or hiding the country name.

This profile option is used if the ICX: Territory profile option is left blank. If HZ: Reference Territory is also left blank, then the current session's NLS Territory setting is used.

### **HZ: Report Error on Obsolete Columns**

Determine whether internal APIs used in TCA report an error when users try to enter a value for an obsolete column. This profile option does not apply to public TCA APIs. Leaving this profile option blank is the same as setting it to *No*.

### **HZ: Turn on File Debug**

Specify if you want all public TCA APIs and some internal APIs used in TCA to write errors to a file.

If you set this profile option to *Yes*, you can use the HZ: API Debug File Name profile option to specify the file name and the HZ: API Debug File Directory profile option to specify the directory where the file resides. Leaving this profile option blank is the same as setting it to *No*.

## **Adapters Profile Option**

See: *Administering Adapters*, page 7- 2 .

### **HZ: Create Log for Adapters**

Specify whether or not to create log entries in the HZ\_ADAPTER\_LOGS table for adapter processes, for example, address validation through an address validation adapter.

In the HZ\_ADAPTER\_LOGS table, the OUT\_DOC column stores the outbound XML documents and log files, and the IN\_DOC column stores the inbound XML documents and logs.

## **Address Validation Profile Options**

See: *Adapters Profile Option*, page B- 5 and *Setting Up Address Validation*, page 2- 4 .

### **ECX: Log File Path**

See: *Define System Profile Options*, *Oracle XML Gateway User's Guide*.

### **HZ: Allow Update to Standardized Address**

Specify whether or not users or programs can update addresses that were standardized by address validation adapters. Even if this profile option is set to *Yes*, updates are allowed only if they do not violate other validations, such as tax validation rules. If a

standardized address is updated, it becomes eligible for revalidation in future address validation processes.

### **HZ: Default Location Service Adapter**

Specify the system-wide default address validation adapter to use, if you want to use only one adapter for all address validations. If no country-specific default adapter is selected by the user for a specific import or address validation process, this default adapter is also used.

### **HZ: Maintain Location History**

Specify whether or not to track the history of location and location profile records. If location history is maintained, then every update to a location's supported address elements is tracked in the HZ\_LOCATION\_PROFILES table for all content sources in the HZ\_LOCATIONS table. Supported address elements include the four address lines, city, state, county, and country.

### **HZ: Timeout Limit for Address Validation**

Specify the number of seconds that the address validation "black box" should wait for a response from the address validation adapter before timing out. The adapter receives the XML file that the black box sends, and should send a corresponding response to validate the addresses.

## **Batch Duplicate Identification Profile Option**

See: Setting Up Batch Duplicate Identification, page 2- 5 .

**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, page 5-22.

### **DQM Match Rule for Batch Duplicate Identification**

Use the DQM Match Rule for Batch Duplicate Identification profile option to store the default match rule to use for batch duplicate identification. This match rule defaults in the Match Rule field of the Submit Duplicate Identification Batch window and can be overridden.

## **Bulk Import Profile Options**

See: Setting Up Bulk Import, page 2- 6 .

**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, page 5-22.

### **HZ: Allow Import of Records with Disabled Lookups**

Specify whether or not data that reference disabled lookups are allowed to be imported in the TCA Registry. Normally, data can be loaded only if validated against enabled lookups.

**HZ: Allow Updates of Address Records During Import**

Specify whether or not address records can be updated during the import if the existing address is not the same as the imported address.

**HZ: Character Value to Indicate NULL During Import**

Specify the character value in the interface tables that, when imported into the TCA tables, would make the corresponding TCA character column null. If an interface table column is null, the corresponding TCA column, empty or not, is not affected by the import.

**HZ: Date Value (DD-MM-YYYY) to Indicate NULL During Import**

Specify the date value in the interface tables that, when imported into the TCA tables, would make the corresponding TCA date column null. Use the date format *DD-MM-YYYY*. If an interface table column is null, the corresponding TCA column, empty or not, is not affected by the import.

**HZ: Error Limit for Import**

Enter the number of errors allowed for an import before stopping the process. This functionality lets you limit the processing time for imports that have too many errors.

**HZ: Import Batch De-Duplication Match Rule**

Specify the default match rule to use for batch de-duplication. This profile option determines the default for the Batch De-Duplication Match Rule parameter of the Import Batch to TCA Registry program.

**HZ: Import Registry De-Duplication Match Rule**

Specify the default match rule to use for Registry de-duplication. This profile option determines the default for the Registry De-Duplication Match Rule parameter of the Import Batch to TCA Registry program.

**HZ: Number of Workers for Import**

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

**HZ: Numeric Value to Indicate NULL During Import**

Specify the numeric value in the interface tables that, when imported into the TCA tables, would make the corresponding numeric TCA column null. If an interface table column is null, the corresponding TCA column, empty or not, is not affected by the import.

**HZ: Use Data Sharing and Security During Import**

Specify whether or not to apply Data Sharing and Security (DSS) for record updates during import. DSS does not affect record inserts, even if this profile option is set to *Yes*. See: *Data Sharing and Security Overview*, page 6- 1 .

## HZ: Use HR Security During Import

Specify whether or not to apply HR security during import. HR security checks the interface tables and prevents updates to parties with HR information. If there are any records with a source system of *DEFAULT* and source ID of *PER%*, the import process would result in error. See: Source Systems Overview, page 10- 2 .

## HZ: Validate Flexfields During Import

Specify whether or not flexfields are validated during the import process. These tables have flexfields:

- HZ\_PARTIES
- HZ\_CONTACT\_POINTS
- HZ\_LOCATIONS
- HZ\_RELATIONSHIPS

## Data Quality Management Profile Options

See: Administering Data Quality Management, page 5- 9 .

### 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: Do not use contact addresses and contact points for DQM Duplicate identification

By default, Data Quality Management includes addresses and contact points of contacts for duplicate identification. If this profile option is not set, the default functionality prevails. Set the profile option to *Yes* if you do not want to include these entities for identifying duplicates.

### **HZ: DQM Index Creation Memory**

Use the HZ: DQM Index Creation Memory profile option to override the default amount of memory for the DQM Index Creation program to use to generate *interMedia* and B-Tree indexes. Enter the amount of memory in megabytes.

### **HZ: DQM Maximum Index Optimization Time**

Enter the maximum processing time, in minutes, allowed for the DQM Index Optimization program to optimize *interMedia* indexes, not B-Tree indexes. The specified time limit could prevent the optimization of all *interMedia* indexes.

### **HZ: DQM Resolution for Party Name Searches that Exceed Maximum Number of Results**

Determine the action to take if search results exceed the number that is set in the HZ: Maximum Number of Match Results profile option. The selected resolution applies only if the user entered party name as one of the search criteria.

- **Prompt User for Additional Search Criteria:** Require the user to enter different or additional search criteria until the number of search results does not exceed the set maximum.
- **Perform Standard SQL Search:** Perform a search with the originally entered search criteria, but without using DQM search functionality. No additional user input is required.

### **HZ: DQM Synchronization Method**

Determine how the staged schema is synchronized with new and updated records in the TCA Registry. You can set this profile option at times that suit your needs, without modifying your Oracle Workflow agent listener setup.

- **Real Time:** Events are generated for automatic synchronization as soon as records are created or updated. The Oracle Workflow agent listener picks up these events to start the synchronization.
- **Batch:** Synchronization occurs only after you run the DQM Synchronization program, which updates the staged schema with all TCA Registry changes since the last run.
- **Disable:** Use this setting if you are not using DQM, for performance reasons.

### **HZ: DQM Text Index Build Type**

Specify how the DQM Staging program builds indexes in the staged schema. The OPTIMAL method is more efficient, but new indexes cannot be queried until the all indexes are completely rebuilt. The INCREMENTAL WITH NO DOWNTIME method is less efficient, but new indexes are available for query sooner. To the user, there is no downtime between querying existing and new staged data.

### **HZ: Enable Quality Weighting for DQM Match Scores**

Specify if quality adjusted matching is enabled to provide quality adjusted match percentages for search results. Leaving the profile option blank is the same as setting it to *No*.

## HZ: Match Rule for Address Mapping Suggestions

Specify the match rule to use to determine which addresses to merge together during Automerge.

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.

**Note:** If you use Oracle Customer Data Librarian (CDL), make sure that this profile option setting also makes sense for CDL purposes. See: *De-Duplication Profile Options, Oracle Customer Data Librarian Implementation Guide*.

## HZ: Match Rule for Relationship Mapping Suggestions

Specify the match rule to use to determine which relationships to merge together during Automerge.

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.

**Note:** If you use Oracle Customer Data Librarian (CDL), make sure that this profile option setting also makes sense for CDL purposes. See: *De-Duplication Profile Options, Oracle Customer Data Librarian Implementation Guide*.

## HZ: Maximum Number of Match Results

Enter the maximum number of matching records from a match rule. If the acquisition component of any match rule provides more than this number of records, the process that is using the match rule would result in error.

## 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, page 11- 1* .

**Important:** 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, page 5-50.

### **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.

### **HZ: Number of Workers Used by Party Merge Program**

Determine the number of parallel workers to use for the Party Merge program when invoked by Automerge to automatically merge duplicates. Workers are processes that run at the same time to complete a task that would otherwise take longer with a single process. This profile option does not apply to running the Party Merge program outside of Automerge.

### **HZ: Stop Scoring After Reaching DQM Automerge Threshold**

Specify whether or not to stop scoring a record after its score reaches the automatic merge threshold. The score for such a record is the same as the automatic merge threshold, even if the score would be higher if scoring did not stop at the threshold. Set this profile option to *Yes* if you are concerned with performance and do not need exact record scores. Otherwise, select *No* or leave the profile option blank.

### **HZ: Use DQM Suggested Groupings for Automerge**

Specify if Automerge uses DQM suggested groupings to merge duplicate addresses and relationships. The match rules assigned to the following profile options determine which relationships or addresses to merge together:

- HZ: Match Rule for Relationship Mapping Suggestions
- HZ: Match Rule for Address Mapping Suggestions

If you want to automatically merge either relationships or addresses, but not both, you can leave the corresponding match rule profile option blank. Addresses or relationships would then be transferred from duplicate candidates to the merge master party, not merged.

If you set the HZ: Use DQM Suggested Groupings for Automerge profile option to *No*, then addresses and relationships are just transferred from duplicate candidates to the master.

## **Data Sharing and Security Profile Options**

See: Administering Data Sharing and Security, page 6- 2 .

### **HZ: Data Sharing and Security Enabled**

Enter *Yes* or *No* to enable or disable the Data Sharing and Security feature. You can also limit TCA security features to a specific user by setting the profile option to *Yes* at the User level before generally releasing the functionality to ensure a controlled release. This profile option lets the system administrator control whom Data Sharing and Security applies to.

## HZ: Default Data Sharing Group

Enter the default data sharing group that should be assigned to any entity that does not match any of the defined data sharing group criteria.

## eLocations Spatial Data Integration Profile Options

See: Setting Up eLocations Spatial Data Integration, page 2-10.

### Applications Proxy Port

Set the proxy port to use for HTTP posts to eLocations. If you are on Release 11.5.6 or earlier, use the HZ: Web Server Proxy Port profile option instead.

### Applications Server-Side Proxy Host And Domain

Set the proxy host to use for HTTP posts to eLocations. If you are on Release 11.5.6 or earlier, use the HZ: Web Server Proxy Host Name profile option instead.

### HZ: Detailed Concurrent Program Output

Specify if a detailed output report is generated when the Locations Spatial Index Rebuild runs. Set this profile option to *Yes* if you want users to access details about the records that the Locations Spatial Index Rebuild program processes and updates. Leaving the profile option blank is the same as setting it to *No*.

### HZ: Spatial Provider URL

This profile option stores the URL to use for HTTP posts to eLocations: *http://elocation.oracle.com/elocation/lbs*.

### HZ: Web Server Proxy Host Name

Set the proxy name to use for HTTP posts to eLocations. If you are on Release 11.5.7 or later, use the Applications Server-Side Proxy Host And Domain profile option instead.

### HZ: Web Server Proxy Port

Set the proxy port to use for HTTP posts to eLocations. If you are on Release 11.5.7 or later, use the Applications Proxy Port profile option instead.

## Relationship Manager Profile Option

See: Setting Up Relationship Manager, page 2-11.

**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, page 5-22.

### HZ: Match Rule for Relationship Manager Search

Specify the seeded or user-defined match rule that Relationship Manager uses to determine the search criteria and results for the DQM party search. You can use the RM SEARCH RULE match rule, which was seeded specifically for the Relationship Manager search.

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

## Source System Management Profile Options

See: Single Source of Truth Overview, page 10- 6 .

### HZ: User Create and Update Rule for Other Entities

Enter the user create and update rule that you want to assign at any of the profile option levels. For each Other entity, the rule determines whether or not the user can create or update records.

### HZ: User Overwrite Rule

Enter the user overwrite rule that you want to assign at any of the profile option levels. For each attribute in the Single Source of Truth record, the rule determines whether user-entered data can overwrite third party data or not.

## Third Party Data Integration Profile Options

**Note:** D&B should provide you with the appropriate information for the D&B user name, D&B user password, and the D&B HTTPS URL. Your information technology organization should provide you with the information needed to set up the profile options related to the appropriate web server proxy. See: Setting Up Third Party Data Integration, page 2-12.

### Apps Servlet Agent

This profile option identifies the servlet agent URL (Apache listener) for your Oracle Applications instance. This URL is used to construct URLs for SERVLET and JSP type functions and has the format *http://*/. For example, *http://ap999us.oracle.com:8000/servlet\_zone*.

### HZ: D&B Password

Enter the password that D&B provides for you to log in to the D&B database.

If you have different user names and passwords for different users, set this profile option along with the HZ: D&B User Name profile option at the User level.

For example, if you want to assign the ORACLE1 user name and WELCOME password to the JSMITH user, you set these two profile options with the given values from D&B at the User level for JSMITH.

**Note:** If you want only users such as JSMITH to use the D&B integration, you should not also set this profile option at the site level.

### HZ: D&B URL

Enter *https://toolkit.dnb.com/access/scripts*, the URL that D&B provides for you to log in to the D&B database.

### HZ: D&B User Name

Enter the user ID that D&B provides for you to log in to the D&B database.

If you have different user names and passwords for different users, set this profile option along with the HZ: D&B Password profile option at the User level.

For example, if you want to assign the ORACLE1 user name and WELCOME password to the JSMITH user, you set these two profile options with the given values from D&B at the User level for JSMITH.

**Note:** If you want only users such as JSMITH to use the D&B integration, you should not also set this profile option at the site level.

### **HZ: Web Server Proxy Host Name**

If your organization uses a proxy server, enter the host name that your information technology group provides.

### **HZ: Web Server Proxy Password**

Enter the password that your information technology group provides if your organization uses a proxy server. The password for the web server proxy might be optional if your web server proxy does not require it.

### **HZ: Web Server Proxy Port**

If your organization uses a proxy server, enter the proxy port number that your information technology group provides.

### **HZ: Web Server Proxy User Name**

Enter the user ID that your information technology group provides if your organization uses a proxy server. The user ID for the web server proxy might be optional if your web server proxy does not require it.

## **Related Topics**

Setting Profile Options, page B- 1

Profile Option Access and Defaults, page B-18

## **Profile Options Only for Other Applications**

Oracle Trading Community Architecture provides functionality that other applications in the Oracle E-Business Suite can use and include. These profile options are for those applications only and do not affect features in the Trading Community Manager responsibility.

Some profile options that do apply to the features in the Trading Community Manager responsibility also apply to other Oracle E-Business Suite applications. See: Profile Option Descriptions, page B- 2 .

**Note:** To determine whether you should set a profile option for the applications you have, check the documentation for those applications. Even if an application uses a specific TCA feature, not all profile options listed for that feature necessarily apply to each application.

To set general profile options for other applications, see: General Profile Options, page B-15. TCA also provides profile options for other applications that use these features:

- Certification, page B-15

- Data Quality Management Search, page B-15
- Duplicate Identification, page B-16
- Duplicate Prevention, page B-17
- Fuzzy Search, page B-18
- Source System Management, page B-18
- Third Party Data Integration, page B-18

## General Profile Options

### HZ: Default Party Type

Specify the more common party type in your TCA Registry, Organization or Person. In certain user interfaces for both organizations and persons, the selected party type presented as the default. For example, Organization is the selected type, so a UI that lets users select either type to search for would default to organization search.

### HZ: Default Phone Number Purpose

Specify the default purpose to be displayed and used for phone numbers, as well as similar contact point types such as fax and mobile. The user can override this default in the user interface, where available.

### HZ: Validate US Addresses

Determine if US addresses are validated for city, state, county, and postal code combinations when the user creates or updates addresses. The addresses are validated based on data set up for sales tax purposes. Leaving this profile option blank is the same as setting it to *No*.

## Certification Profile Option

### HZ: Display Certification Level

Specify whether or not the certification level is displayed in the user interface. This profile option setting applies to all Oracle e-Business Suite applications that are using the TCA certification feature.

## Data Quality Management Search 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*, page 5-22.

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

### HZ: Enable DQM Party Search

Determine whether Data Quality Management 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 profile options. DQM search is enabled only for searches that has an assigned match rule.

### **HZ: Match Rule for Contact Advanced Search**

Specify the seeded or user-defined match rule for determining the search criteria and results for the contact advanced search. The profile option defaults to the seeded match rule HZ\_PERSON\_ADVANCED\_SEARCH\_MATCH\_RULE. See: HZ\_PERSON\_ADVANCED\_SEARCH\_MATCH\_RULE, *Oracle Trading Community Architecture Reference Guide*.

### **HZ: Match Rule for Contact Simple Search**

Specify the seeded or user-defined match rule for determining the search criteria and results for the contact simple search. 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*.

### **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. Use match rules with the Search purpose. The profile option defaults to the seeded match rule HZ\_ORG\_ADV\_SEARCH\_RULE. See: 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. 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*.

### **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. 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\_ADVANCED\_SEARCH\_MATCH\_RULE. See: 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. 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*.

## **Duplicate Identification 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*, page 5-22.

### **DQM Match Rule for Online Duplicate Identification**

Specify the default match rule to use for identifying duplicates. This profile option can also be used to store the match rule for duplicate prevention. Before you set this profile option, verify the feature that it applies to.

**HZ: Allow Access to Submit Merge Requests**

Determine if users can mark potential duplicate organizations or persons to submit as a merge request to Oracle Customer Data Librarian. Set this profile option to *Yes* only if you have Oracle Customer Data Librarian.

**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.

**Duplicate Prevention 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*, page 5-22.

**DQM Match Rule for Online Duplicate Identification**

Specify the default match rule to use for finding duplicates of entered or updated records, and preventing duplicates from entering the TCA Registry. Before you set this profile option, verify the feature that it applies to.

**HZ: Duplicate Allowed**

Determine whether duplicate entry into the Registry is allowed or not. If you set the profile option to *Yes*, records with duplicates that exceed the override threshold as defined in the match rule can still be saved. The *No* default prevents such records from being saved.

**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 match rules below.

**HZ: Match Rule for Contact Duplicate Prevention**

Specify the seeded or user-defined match rule for identifying potential duplicates of the contact that the user is creating. Use match rules with the Search purpose. The profile option defaults to the seeded match rule SAMPLE: SEARCH. See: *SAMPLE: SEARCH, Oracle Trading Community Architecture Reference Guide*.

**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 purpose. The profile option defaults to the seeded match rule SAMPLE: SEARCH. See: *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 purpose. The profile option defaults to the seeded match rule

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

## Fuzzy Search Profile Options

### HZ: Address Key Length

Specify the number of characters from the address line that are included in the address key.

### HZ: Cleanse Fuzzy Key

Determine whether or not internal and trailing vowels, not leading vowels, as well as double letters are removed in a word when creating name and address fuzzy keys.

### HZ: Key Word Count

Specify the number of words to include in the organization or group name fuzzy key. TCA uses this profile option during the creation of keys that allow fuzzy search.

### HZ: Postal Code Key Length

Specify the number of characters from the postal code to include in the address key. TCA uses this profile option during the creation of keys that allow fuzzy search.

## Source System Management Profile Option

### HZ: Source System Mapping Access

Specify the type of access for source system mapping. You should set the general user responsibilities to *View Only*, and the superuser responsibilities to *Create and Update*.

## Third Party Data Integration Profile Option

### HZ: Allow Access to D&B Online Purchase

Specify whether users can access D&B purchase or not. Set this profile option to *Yes* only if you have a contract with D&B and have completed the integration with D&B.

## 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.

<b>Profile Option</b>	<b>Required</b>	<b>Default</b>	<b>User Access</b>	<b>System Admin Access: User Level</b>	<b>System Admin Access: Responsibility Level</b>	<b>System Admin Access: Application Level</b>	<b>System Admin Access: Site Level</b>
DQM Match Rule for Batch Duplicate Identification	Required	No Default	Update	Update	Update	Update	Update
DQM Match Rule for Online Duplicate Identification	Required	No Default	Update	Update	Update	Update	Update
DQM Match Rule for Search	Required	No Default	Update	Update	Update	Update	Update
HZ: Address Key Length	Optional	No Default	No Access	No Access	No Access	No Access	Update
HZ: Allow Access to D&B Online Purchase	Required	Yes	No Access	No Access	Update	Update	Update
HZ: Allow Access to Submit Merge Requests	Required	Yes	No Access	No Access	Update	Update	Update
HZ: Allow Import of Records with Disabled Lookups	Required	Yes	Update	View Only	View Only	View Only	Update
HZ: Allow Update to Standardized Address	Required	Yes	Update	No Access	No Access	No Access	Update
HZ: Allow Updates of Address Records During Import	Required	Yes	Update	View Only	View Only	View Only	Update
HZ: API Debug File Directory	Required	No Default	Update	Update	Update	Update	Update

<b>Profile Option</b>	<b>Required</b>	<b>Default</b>	<b>User Access</b>	<b>System Admin Access: User Level</b>	<b>System Admin Access: Responsibility Level</b>	<b>System Admin Access: Application Level</b>	<b>System Admin Access: Site Level</b>
HZ: API Debug File Name	Required	No Default	Update	Update	Update	Update	Update
HZ: Character Value to Indicate NULL During Import	Optional	!	Update	View Only	View Only	View Only	Update
HZ: Cleanse Fuzzy Key	Optional	Yes	Update	No Access	No Access	No Access	No Access
HZ: Create Log for Adapters	Optional	No	Update	No Access	No Access	No Access	Update
HZ: D&B Password	Required	No Default	Update	Update	Update	Update	Update
HZ: D&B URL	Required	No Default	Update	Update	Update	Update	Update
HZ: D&B User Name	Required	No Default	Update	Update	Update	Update	Update
HZ: Data Sharing and Security Enabled	Required	No	No Access	Update	Update	Update	Update
HZ: Date Value (DD-MM-YYYY) to Indicate NULL During Import	Optional	01-01- 4000	Update	View Only	View Only	View Only	Update
HZ: Default Address Style	Optional	<i>Postal Address</i>	Update	Update	Update	Update	Update
HZ: Default Data Sharing Group	Optional	No Default	No Access	View Only	View Only	View Only	Update

<b>Profile Option</b>	<b>Required</b>	<b>Default</b>	<b>User Access</b>	<b>System Admin Access: User Level</b>	<b>System Admin Access: Responsibility Level</b>	<b>System Admin Access: Application Level</b>	<b>System Admin Access: Site Level</b>
HZ: Default Flexible Address Format	Optional	<i>United States Address Style</i>	No Access	No Access	Update	Update	Update
HZ: Default Location Service Adapter	Optional	No Default	Update	No Access	No Access	No Access	Update
HZ: Default Name Style	Optional	<i>Concatenated Name</i>	Update	Update	Update	Update	Update
HZ: Default Party Type	Optional	<i>Organization</i>	Update	Update	Update	Update	Update
HZ: Default Phone Number Purpose	Optional	<i>Business</i>	Update	Update	Update	Update	Update
HZ: Default Profile Attributes for Merge Mapping	Required	<i>Party with Earliest Creation Date</i>	View Only	Update	Update	Update	Update
HZ: Default Secondary Profile Attributes for Merge Mapping	Required	<i>Party with Latest Update Date</i>	Update	Update	Update	Update	Update
HZ: Detailed Concurrent Program Output	Required	No Default	Update	Update	Update	Update	Update
HZ: Display Certification Level	Required	No	View Only	View Only	View Only	View Only	Update
HZ: Do not use contact addresses and contact points for DQM Duplicate identification	Optional	No Default	Update	Update	Update	Update	Update

<b>Profile Option</b>	<b>Required</b>	<b>Default</b>	<b>User Access</b>	<b>System Admin Access: User Level</b>	<b>System Admin Access: Responsibility Level</b>	<b>System Admin Access: Application Level</b>	<b>System Admin Access: Site Level</b>
HZ: DQM Index Creation Memory	Required	No Default	Update	Update	Update	Update	Update
HZ: DQM Maximum Index Optimization Time	Optional	No Default	Update	Update	Update	Update	Update
HZ: DQM Resolution for Party Name Searches that Exceed Maximum Number of Results	Optional	<i>Prompt User for Additional Search Criteria</i>	Update	Update	Update	Update	Update
HZ: DQM Synchronization Method	Required	No Default	Update	Update	Update	Update	Update
HZ: DQM Text Index Build Type	Required	<i>OPTIMAL</i>	Update	Update	Update	Update	Update
HZ: Duplicate Allowed	Required	<i>No</i>	Update	Update	Update	Update	Update
HZ: Enable DQM Party Search	Required	<i>No</i>	No Access	No Access	Update	Update	Update
HZ: Enable Duplicate Prevention at Party Creation	Required	<i>Disabled</i>	No Access	No Access	Update	Update	Update
HZ: Enable Quality Weighting for DQM Match Scores	Required	No Default	Update	Update	Update	Update	Update
HZ: Error Limit for Import	Optional	10000	Update	View Only	View Only	View Only	Update

<b>Profile Option</b>	<b>Required</b>	<b>Default</b>	<b>User Access</b>	<b>System Admin Access: User Level</b>	<b>System Admin Access: Responsibility Level</b>	<b>System Admin Access: Application Level</b>	<b>System Admin Access: Site Level</b>
HZ: Execute API Callouts	Required	No Default	Update	Update	Update	Update	Update
HZ: Generate Contact Number	Required	No Default	Update	Update	Update	Update	Update
HZ: Generate Events for DQM Real-Time Synchronization	Required	No Default	Update	Update	Update	Update	Update
HZ: Generate Party Number	Required	No Default	Update	Update	Update	Update	Update
HZ: Generate Party Site Number	Required	No Default	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: Key Word Count	Optional	No Default	No Access	No Access	No Access	No Access	Update
HZ: Language for Country Display	Optional	No Default	Update	Update	Update	Update	Update
HZ: Maintain Location History	Optional	Yes	Update	No Access	No Access	No Access	Update
HZ: Match Rule for Address Mapping Suggestions	Optional	<i>DL ADDRESS DEFAULT</i>	Update	Update	Update	Update	Update

<b>Profile Option</b>	<b>Required</b>	<b>Default</b>	<b>User Access</b>	<b>System Admin Access: User Level</b>	<b>System Admin Access: Responsibility Level</b>	<b>System Admin Access: Application Level</b>	<b>System Admin Access: Site Level</b>
HZ: Match Rule for Contact Advanced Search	Required	<i>HZ_PERSON_ADVANCED_SEARCH_MATCH_RULE</i>	No Access	No Access	Update	Update	Update
HZ: Match Rule for Contact Duplicate Prevention	Required	<i>SAMPLE_SEARCH</i>	No Access	No Access	Update	Update	Update
HZ: Match Rule for Contact Simple Search	Required	<i>HZ_PERSON_SIMPLE_SEARCH_RULE</i>	No Access	No Access	Update	Update	Update
HZ: Match Rule for Organization Advanced Search	Required	<i>HZ_ORG_ADV_SEARCH_RULE</i>	No Access	No Access	Update	Update	Update
HZ: Match Rule for Organization Duplicate Prevention	Required	<i>SAMPLE_SEARCH</i>	No Access	No Access	Update	Update	Update
HZ: Match Rule for Organization Simple Search	Required	<i>HZ_ORG_SIMPLE_SEARCH_RULE</i>	No Access	No Access	Update	Update	Update
HZ: Match Rule for Person Advanced Search	Required	<i>HZ_PERSON_ADVANCED_SEARCH_MATCH_RULE</i>	No Access	No Access	Update	Update	Update
HZ: Match Rule for Person Duplicate Prevention	Required	<i>SAMPLE_SEARCH</i>	No Access	No Access	Update	Update	Update

<b>Profile Option</b>	<b>Required</b>	<b>Default</b>	<b>User Access</b>	<b>System Admin Access: User Level</b>	<b>System Admin Access: Responsibility Level</b>	<b>System Admin Access: Application Level</b>	<b>System Admin Access: Site Level</b>
HZ: Match Rule for Person Simple Search	Required	<i>HZ_PERSON_SIMPLE_SEARCH_RULE</i>	No Access	No Access	Update	Update	Update
HZ: Match Rule for Relationship Manager Search	Required	No Default	Update	Update	Update	Update	Update
HZ: Match Rule for Relationship Mapping Suggestions	Optional	<i>DL_RELATIONSHIP_DEFAULT</i>	Update	Update	Update	Update	Update
HZ: Maximum Number of Match Results	Required	200	Update	Update	Update	Update	Update
HZ: Merge Master Party Defaulting	Required	<i>Party with Most Accounts</i>	View Only	No Access	No Access	No Access	Update
HZ: Name/ Address Backwards Compatibility	Required	Yes	Update	Update	Update	Update	Update
HZ: Number of Workers for DQM Duplicate Identification Program	Required	3	Update	Update	Update	Update	Update
HZ: Number of Workers for Import	Required	1	Update	Update	Update	Update	Update
HZ: Number of Workers Used by Party Merge Program	Required	No Default	Update	Update	Update	Update	Update

<b>Profile Option</b>	<b>Required</b>	<b>Default</b>	<b>User Access</b>	<b>System Admin Access: User Level</b>	<b>System Admin Access: Responsibility Level</b>	<b>System Admin Access: Application Level</b>	<b>System Admin Access: Site Level</b>
HZ: Numeric Value to Indicate NULL During Import	Optional	-9999	Update	View Only	View Only	View Only	Update
HZ: Postal Code Key Length	Optional	No Default	No Access	No Access	No Access	No Access	Update
HZ: Profile Version Method for Updates	Required	No Default	View Only	View Only	View Only	View Only	Update
HZ: Protect Party Modeling Before Merge	Optional	Yes	Update	Update	Update	Update	Update
HZ: Reference Language	Optional	No Default	Update	Update	Update	Update	Update
HZ: Reference Territory	Optional	No Default	Update	Update	Update	Update	Update
HZ: Report Error on Obsolete Columns	Optional	No Default	View Only	No Access	No Access	No Access	Update
HZ: Source System Mapping Access	Required	<i>View Only</i>	No Access	No Access	Update	Update	Update
HZ: Spatial Provider URL	Required	<i>http://elocation.oracle.com/elocation/lbs</i>	Update	Update	Update	Update	Update
HZ: Stop Scoring After Reaching DQM Match Threshold	Optional	No Default	Update	Update	Update	Update	Update

<b>Profile Option</b>	<b>Required</b>	<b>Default</b>	<b>User Access</b>	<b>System Admin Access: User Level</b>	<b>System Admin Access: Responsibility Level</b>	<b>System Admin Access: Application Level</b>	<b>System Admin Access: Site Level</b>
HZ: Timeout Limit for Address Validation	Required	300	Update	No Access	No Access	No Access	Update
HZ: Turn On File Debug	Required	No Default	Update	Update	Update	Update	Update
HZ: Use Data Sharing and Security During Import	Required	No	Update	View Only	View Only	View Only	Update
HZ: Use DQM Suggested Groupings for Automerge	Optional	No	Update	Update	Update	Update	Update
HZ: Use HR Security During Import	Required	No	Update	View Only	View Only	View Only	Update
HZ: User Data Creation Rule	Optional	No Default	View Only	Update	Update	Update	Update
HZ: User Overwrite Rule	Optional	No Default	View Only	Update	Update	Update	Update
HZ: Validate Flexfields During Import	Required	No	Update	View Only	View Only	View Only	Update
HZ: Validate US Addresses	Required	No Default	No Access	No Access	Update	Update	Update
HZ: Web Server Proxy Host Name	Conditionally Required	No Default	Update	Update	Update	Update	Update

<b>Profile Option</b>	<b>Required</b>	<b>Default</b>	<b>User Access</b>	<b>System Admin Access: User Level</b>	<b>System Admin Access: Responsibility Level</b>	<b>System Admin Access: Application Level</b>	<b>System Admin Access: Site Level</b>
HZ: Web Server Proxy Password	Conditionally Required	No Default	Update	Update	Update	Update	Update
HZ: Web Server Proxy Port	Conditionally Required	No Default	Update	Update	Update	Update	Update
HZ: Web Server Proxy User Name	Conditionally Required	No Default	Update	Update	Update	Update	Update
HZ: Work Unit Size for Import	Required	10000	Update	Update	Update	Update	Update

## Related Topics

Setting Profile Options, page B- 1

Profile Option Descriptions, page B- 2

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## Standard Navigation Paths

This appendix describes standard navigation paths for administering Oracle Trading Community Architecture.

This appendix covers the following topics:

- Standard Navigation Paths

### Standard Navigation Paths

Although your system administrator may have customized your navigator, typical navigation paths are shown in this table. Access all of these features through the Trading Community Manager responsibility.

<b>Feature</b>	<b>Functionality</b>	<b>Navigation Path</b>
Adapters	All	Trading Community > Administration > Adapters
Classifications	All	Trading Community > Administration > Classifications
Data Quality Management	Attributes and Transformations	Trading Community > Administration > DQM > Attributes and Transformations
Data Quality Management	Match Rules	Trading Community > Administration > DQM > Match Rules
Data Quality Management	Merge Dictionary	Trading Community > Administration > DQM > Merge Dictionary
Data Quality Management	Word Replacements	Trading Community > Administration > DQM > Word Replacements
Data Sharing and Security	All	Trading Community > Administration > Security > Data Sharing Groups
Extensions	All	Trading Community > Administration > Extensions
Phones	All	Trading Community > Administration > Phones
Phone Formats	Define Phone Formats	Setup > Define Phone Formats
Relationships	All	Trading Community > Administration > Relationships
Source System Management	Security for Other Entities	Trading Community > Administration > Source System Management > Security for Other Entities
Source System Management	Single Source of Truth (SST)	Trading Community > Administration > Source System Management > Single Source of Truth (SST)
Source System Management	Source Systems	Trading Community > Administration > Source System Management > Source Systems

## Related Topics

Introduction to Administration, page 1- 1

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