

**Oracle® Customer Data Librarian**

Implementation Guide

Release 12

**Part No. B25900-02**

February 2007

Oracle Customer Data Librarian Implementation Guide, Release 12

Part No. B25900-02

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# Send Us Your Comments

## Oracle Customer Data Librarian Implementation Guide, Release 12

### Part No. B25900-02

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
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- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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# Preface

## Intended Audience

Welcome to Release 12 of the *Oracle Customer Data Librarian Implementation Guide*.

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

- The principles and customary practices of your business area.
- Computer desktop application usage and terminology.

If you have never used Oracle Applications, we suggest you attend one or more of the Oracle Applications training classes available through Oracle University.

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

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## Structure

### **1 License for Oracle Customer Hub Steward**

This chapter describes the licensing information for Oracle Customer Hub Steward.

### **2 General Implementation**

This chapter describes general implementation of Oracle Customer Data Librarian.

### **3 Feature-Specific Implementation**

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

#### **A Reports and Processes**

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

#### **B Oracle Customer Data Librarian Profile Options and Profile Option Categories**

This appendix describes the profile options that affect the operation of Oracle Customer Data Librarian.

## Related Information Sources

This document is included on the Oracle Applications Document Library, which is supplied in the Release 12 DVD Pack. You can download soft-copy documentation as PDF files from the Oracle Technology Network at <http://otn.oracle.com/documentation>, or you can purchase hard-copy documentation from the Oracle Store at <http://oraclestore.oracle.com>. The Oracle E-Business Suite Documentation Library Release 12 contains the latest information, including any documents that have changed significantly between releases. If substantial changes to this book are necessary, a revised version will be made available on the online documentation CD on Oracle *MetaLink*.

If this guide refers you to other Oracle Applications documentation, use only the Release 12 versions of those guides.

For a full list of documentation resources for Oracle Applications Release 12, see Oracle Applications Documentation Resources, Release 12, Oracle*MetaLink* Document 394692.1.

### **Online Documentation**

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

- **PDF** - PDF documentation is available for download from the Oracle Technology Network at <http://otn.oracle.com/documentation>.
- **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*.
- **Oracle MetaLink Knowledge Browser** - The Oracle*MetaLink* Knowledge Browser lets you browse the knowledge base, from a single product page, to find all documents for that product area. Use the Knowledge Browser to search for release-specific information, such as FAQs, recent patches, alerts, white papers, troubleshooting tips, and other archived documents.
- **Oracle eBusiness Suite Electronic Technical Reference Manuals** - Each Electronic Technical 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 Oracle*MetaLink*.

### **Related Guides**

You should have the following related books on hand. Depending on the requirements of your particular installation, you may also need additional manuals or guides.

#### **Oracle Applications Installation Guide: Using Rapid Install:**

This book is intended for use by anyone who is responsible for installing or upgrading Oracle Applications. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle Applications Release 12, or as part of an upgrade from Release 11*i* to Release 12. The book also describes the steps needed to install the technology stack components only, for the special situations where this is applicable.

#### **Oracle Applications Maintenance Procedures:**

This guide describes how to use AD maintenance utilities to complete tasks such as compiling invalid objects, managing parallel processing jobs, and maintaining snapshot information. Part of Maintaining Oracle Applications, a 3-book set that also includes

Oracle Applications Patching Procedures and Oracle Applications Maintenance Utilities.

**Oracle Applications Maintenance Utilities:**

This guide describes how to run utilities, such as AD Administration and AD Controller, used to maintain the Oracle Applications file system and database. Outlines the actions performed by these utilities, such as monitoring parallel processes, generating Applications files, and maintaining Applications database entities. Part of *Maintaining Oracle Applications*, a 3-book set that also includes *Oracle Applications Patching Procedures* and *Oracle Applications Maintenance Procedures*.

**Oracle Applications Patching Procedures:**

This guide describes how to patch the Oracle Applications file system and database using AutoPatch, and how to use other patching-related tools like AD Merge Patch, OAM Patch Wizard, and OAM Registered Flagged Files. Describes patch types and structure, and outlines some of the most commonly used patching procedures. Part of *Maintaining Oracle Applications*, a 3-book set that also includes *Oracle Applications Maintenance Utilities* and *Oracle Applications Maintenance Procedures*.

**Oracle Applications Upgrade Guide: Release 11i to Release 12:**

This guide provides information for DBAs and Applications Specialists who are responsible for upgrading a Release 11i Oracle Applications system (techstack and products) to Release 12. In addition to information about applying the upgrade driver, it outlines pre-upgrade steps and post-upgrade steps, and provides descriptions of product-specific functional changes and suggestions for verifying the upgrade and reducing downtime.

**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 Application Framework Developer's Guide:**

This guide contains the coding standards followed by the Oracle Applications development staff to produce applications built with Oracle Application Framework. This guide is available in PDF format on *OracleMetaLink* and as online documentation in JDeveloper 10g with Oracle Application Extension.

**Oracle Application Framework Personalization Guide:**

This guide covers the design-time and run-time aspects of personalizing applications built with Oracle Application Framework.

**Oracle Applications Concepts:**

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12, or contemplating significant changes to a configuration. After describing the Oracle Applications architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

**Oracle Applications Developer's Guide:**

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle Applications.

**Oracle Applications Flexfields Guide:**

This guide provides flexfields planning, setup, and reference information for the Oracle Applications implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

**Oracle Applications Supportability Guide:**

This manual contains information on Oracle Diagnostics and the Logging Framework for system administrators and custom developers.

**Oracle Applications System Administrator's Guide Documentation Set:**

This documentation set provides planning and reference information for the Oracle Applications System Administrator. *Oracle Applications System Administrator's Guide - Configuration* contains information on system configuration steps, including defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help. *Oracle Applications System Administrator's Guide - Maintenance* provides information for frequent tasks such as monitoring your system with Oracle Applications Manager, managing concurrent managers and reports, using diagnostic utilities, managing profile options, and using alerts. *Oracle Applications System Administrator's Guide - Security* describes User Management, data security, function security, auditing, and security configurations.

**Oracle Applications User's Guide:**

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle Applications. This guide also includes information on setting user profiles, as well as running and reviewing concurrent requests.

**Oracle Common Application Calendar Implementation Guide:**

The Implementation Guide contains important reference and background information on each of the Oracle Common Application Calendar modules. In addition, it contains procedures and implementing and System Administration tasks that are necessary to perform in each of the modules.

**Oracle Common Application Calendar User Guide:**

The User Guide contains important reference and background information on each of the Oracle Common Application Calendar modules. In addition, it contains procedures and using information that describe the common user and tasks that are necessary to perform in each of the modules.

**Oracle Integration Repository User's Guide:**

This guide covers the employment of Oracle Integration Repository in researching and deploying business interfaces to produce integrations between applications.

**Oracle Workflow Administrator's Guide:**

This guide explains how to complete the setup steps necessary for any product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

**Oracle Workflow API Reference:**

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

**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 users can view and respond to workflow notifications and monitor the progress of their workflow processes.

**Oracle Financials and Oracle Procurement Functional Upgrade Guide: Release 11i to Release 12:**

This guides provides detailed information about the functional impacts of upgrading Oracle Financials and Oracle Procurement products from Release 11i to Release 12. This guide supplements the Oracle Applications Upgrade Guide: Release 11i to Release 12.

**Oracle Financials Concepts Guide:**

This guide describes the fundamental concepts of Oracle Financials. The guide is intended to introduce readers to the concepts used in the applications, and help them compare their real world business, organization, and processes to those used in the applications.

**Oracle Financials Glossary:**

The glossary includes definitions of common terms that are shared by all Oracle Financials products. In some cases, there may be different definitions of the same term for different Financials products. If you are unsure of the meaning of a term you see in an Oracle Financials guide, please refer to the glossary for clarification. You can find the glossary in the online help or in the *Oracle Financials Implementation Guide*.

**Oracle Financials Implementation Guide:**

This guide provides information on how to implement the Oracle Financials E-Business Suite. It guides you through setting up your organizations, including legal entities, and their accounting, using the Accounting Setup Manager. It covers intercompany

accounting and sequencing of accounting entries, and it provides examples.

**Oracle Customer Data Librarian User Guide:**

This guide describes how to use Oracle Customer Data Librarian to establish and maintain the quality of the Trading Community Architecture Registry, focusing on consolidation, cleanliness, and completeness. Oracle Customer Data Librarian has all of the features in Oracle Customers Online, and is also part of the Oracle Customer Data Management product family.

**Oracle Customers Online Implementation Guide:**

This guide describes how to implement Oracle Customers Online.

**Oracle Customers Online User Guide:**

This guide describes how to use Oracle Customers Online to view, create, and maintain your customer information. Oracle Customers Online is based on Oracle Trading Community Architecture data model and functionality, and is also part of the Oracle Customer Data Management product family.

**Oracle Receivables Implementation Guide:**

This guide provides you with information on how to implement Oracle Receivables. Use this guide to understand the implementation steps required for application use, including how to set up customers, transactions, receipts, accounting, tax, and collections. This guide also includes a comprehensive list of profile options that you can set to customize application behavior.

**Oracle Receivables Reference Guide:**

This guide provides you with detailed information about all public application programming interfaces (APIs) that you can use to extend Oracle Receivables functionality. This guide also describes the Oracle Receivables open interfaces, such as AutoLockbox which lets you create and apply receipts and AutoInvoice which you can use to import and validate transactions from other systems. Archiving and purging Receivables data is also discussed in this guide.

**Oracle Receivables User Guide:**

This guide provides you with information on how to use Oracle Receivables. Use this guide to learn how to create and maintain transactions and bills receivable, enter and apply receipts, enter customer information, and manage revenue. This guide also includes information about accounting in Receivables. Use the Standard Navigation Paths appendix to find out how to access each Receivables window.

**Oracle Trading Community Architecture Administration Guide:**

This guide describes how to administer and implement Oracle Trading Community Architecture (TCA). You set up, control, and manage functionality that affects data in the TCA Registry. It also describes how to set up and use Resource Manager to manage resources.

**Oracle Trading Community Architecture Reference Guide:**

This guide contains seeded relationship types, seeded Data Quality Management data, D and 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:**

This guide explains 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 Trading Community Architecture User Guide:**

This guide describes the Oracle Trading Community Architecture (TCA) and how to use features from the Trading Community Manager responsibility to create, update, enrich, and cleanse the data in the TCA Registry. It also describes how to use Resource Manager to define and manage resources.

## **Integration Repository**

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

## **Do Not Use Database Tools to Modify Oracle Applications Data**

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

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

Because Oracle Applications tables are interrelated, any change you make using 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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# License for Oracle Customer Hub Steward

This chapter describes the licensing information for Oracle Customer Hub Steward.

This chapter covers the following topics:

- License

## License

### Customer Hub Data Steward:

The Customer Hub Data Steward is a bundle that includes two components, Siebel Customer Data Steward and Oracle Customer Data Librarian.

If you are licensed for Customer Hub Data Steward then your use of the bundled programs is as defined in your license order.

If you are licensed for Siebel Customer Data Steward then your use is limited to the component that you are licensed for and you do not have rights to use the Oracle Customer Data Librarian.

If you are licensed for Oracle Customer Data Librarian then your use is limited to the component that you are licensed for and you do not have rights to use the Siebel Customer Data Steward.



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## General Implementation

This chapter describes general implementation of Oracle Customer Data Librarian.

This chapter covers the following topics:

- Overview
- Assigning Responsibilities to Users

### Overview

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

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

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

- Assigning Responsibilities to Users, page 2-1
- Profile Options and Profile Option Categories Overview, page B-1
- Feature-Specific Implementation Overview, page 3-1

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

### Assigning Responsibilities to Users

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

available for CDL users:

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

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

<b>Responsibility</b>	<b>Menu</b>	<b>Access</b>	<b>Menu Exclusion</b>
Oracle Customers Online Data Librarian	IMC_NG_ROOT_ME NU	Home, Customers, Reports, Data Quality, and Import tabs	Administration tab
Oracle Customers Online Data Librarian Superuser	IMC_NG_ROOT_ME NU	Home, Customers, Reports, Data Quality, Import, and Administration tabs	None
TCA Data Security Administrator	HZ Security Main Menu	View, create, update, and delete privileges for Data Sharing and Security administration	None

### **To Assign Responsibilities to Users:**

**Responsibility:** System Administrator

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

## **Related Topics**

Overview, page 2-1

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## Feature-Specific Implementation

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

This chapter covers the following topics:

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

### Feature-Specific Implementation Overview

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

- **De-Duplication:** Set up for identifying and resolving duplicates. See: Setting Up De-Duplication, page 3-2.
- **Import:** Set up for importing data from legacy, third party, and other external sources. See: Setting Up Import, page 3-5.
- **Party Maintenance:** Set up for maintaining parties, including assigning certification levels and setting party status. See: Setting Up Party Maintenance, page 3-6.
- Oracle Trading Community Architecture (TCA) features that are used or integrated into Oracle Customer Data Librarian, including:
  - **Data Sharing and Security (DSS):** Control the access privileges of users to create, update, or delete customer data.
  - **Third Party Data Integration:** Integrate Oracle Customer Data Librarian with D&B so that users can access D&B information to enrich customer information.

- **Source System Management:** Set up for mappings between external source systems and customer data. You can control how source system and user-entered data are displayed, created, and overwritten.

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

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

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

## Related Topics

Overview, page 2-1

## Setting Up De-Duplication

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

- Identifying duplicates using Smart Search.
- Identifying duplicates using System Duplicate Identification (SDI) batches.
- Automatically merging parties identified as definite duplicates as part of creating SDI batches.
- Searching for specific addresses or relationships, within a single party or a set of duplicate parties, for mapping purposes.
- Generating suggested defaults for address mapping.
- Generating suggested defaults for relationship mapping.

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

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

### To Set Up De-Duplication:

1. Set up Data Quality Management. See: Administering Data Quality Management,

*Oracle Trading Community Architecture Administration Guide*. Make sure to:

- Run the DQM Staging program to create the staged schema.
- Periodically run the DQM Synchronization program to update the staged schema.
- Compile all match rules that you plan to use.

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

- To create match rules to be used for Automerge in System Duplicate Identification batch creation, you must define the match rules as allowed for Automerge.
- If you create a new rule for identifying duplicates using Smart Search, the search criteria shown in the user interface will change based on your acquisition and scoring attributes. If you define a match rule set, the superset of all attributes in the set would be the search criteria.

**Note:** Status and Party Type are always displayed as search criteria for Smart Search, no matter the match rule.

- For searching for addresses and relationships to map, the search criteria are always the same. The match rule affects only the scoring. Your custom match rules should have the same scoring attributes as the DL ADDRESS AND RELATIONSHIP SEARCH match rule, which is the seeded match rule for this purpose.
2. Optionally use the DUP\_BATCH\_RESTRICTION\_LIST Receivables lookup to define the list of attributes that appear in the System Duplicate Identification Batches page. These attributes are used as restriction criteria for creating SDI batches. You can add any attribute from the HZ\_PARTIES table to the list. See: Defining Receivables Lookups, *Oracle Receivables Implementation Guide*.
  3. For address validation information to be displayed when users map duplicate addresses, set up and run address validation at a frequency that fits your needs. See: Setting Up Address Validation, *Oracle Trading Community Architecture Administration Guide* and Address Validation, *Oracle Trading Community Architecture User Guide*.

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

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

See: Profile Options and Profile Option Categories Overview, page B-1.

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

sure that a conflicting or different rule is not set at the user level. See: *Source System Management Setup, Oracle Trading Community Architecture Administration Guide*.

## Related Topics

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

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

Feature-Specific Implementation Overview, page 3-1

## Setting Up Import

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

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

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

### To Set Up Import:

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

See: *Profile Options and Profile Option Categories Overview*, page B-1.

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

## Related Topics

Import Overview, *Oracle Customer Data Librarian User Guide*

## Setting Up Party Maintenance

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

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

### To Set Up Party Maintenance:

1. Set up Data Quality Management. See: *Administering Data Quality Management, Oracle Trading Community Architecture Administration Guide*. Make sure to:
  - Run the DQM Staging program to create the staged schema.
  - Periodically run the DQM Synchronization program to update the staged schema.
  - Compile all match rules that you plan to use.

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

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

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

See: *Data Librarian Setup*, page B-13.

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

*Architecture Administration Guide.*

## **Related Topics**

Maintaining Parties, *Oracle Customer Data Librarian User Guide*

Feature Specific Implementation Overview, page 3-1



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## Reports and Processes

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

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

### Reports

#### **D&B Global Data Products Request Report**

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

### Processes

#### **Copy Relationship Type and All Relationships**

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

#### **Copy Organization Extensions Data for Profile Versioning**

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

#### **Copy Person Extensions Data for Profile Versioning**

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

*Trading Community Architecture Administration Guide.*

### **DQM Compile All Rules**

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

### **DQM Index Optimization Program**

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

### **DQM Staging Program**

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

### **DQM Synchronization Program**

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

### **Flatten Employee Hierarchy**

Affects the employees feature in the Home tab. See: Resource Manager Concurrent Programs, *Oracle Trading Community Architecture Administration Guide.*

### **Flatten Group Hierarchy**

Affects the employees feature in the Home tab. See: Resource Manager Concurrent Programs, *Oracle Trading Community Architecture Administration Guide.*

### **Generate Key for Fuzzy Match**

Generates keys for fuzzy search.

### **Generate Request List for D&B Batch Load**

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

### **Generate Time Zone for Locations**

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

### **Generate Time Zone for Phone Numbers**

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

### **IMC: Refresh Summary Information for Quality Reports**

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

### **IMC: Refresh Summary Information for Reports**

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

### **Load D&B Data (8i Implementation)**

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

### **Rebuilding Intermedia Index for Task Names**

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

### **Refresh of Classification Denormalization**

Populates and refreshes the HZ\_CLASS\_CODE\_DENORM denormalization table. See: Refresh of Classification Denormalization, *Oracle Trading Community Architecture Administration Guide*.

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

Migrates source system information. See: Administering Source System Management, *Oracle Trading Community Architecture Administration Guide*.

### **Synchronize Employees**

Affects the employees feature in the Home tab. See: Resource Manager Concurrent Programs, *Oracle Trading Community Architecture Administration Guide*.

### **Synchronize JTF\_NOTES\_TL\_C1 index**

Affects notes in the Home and Customers tabs.

### **Third Party Data Integration Update**

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



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## Oracle Customer Data Librarian Profile Options and Profile Option Categories

This appendix describes the profile options that affect the operation of Oracle Customer Data Librarian.

This appendix covers the following topics:

- Profile Options and Profile Option Categories Overview
- Profile Option Category and Profile Options Descriptions

### Profile Options and Profile Option Categories Overview

During implementation, set a value for each Oracle Customer Data Librarian profile option to specify how Customer Data Librarian controls access to and processes data.

See: Setting User Profile Options, *Oracle Applications System Administrator's Guide - Maintenance*

Profile options are grouped into one or more profile option categories enabling you to view only the profile options that pertain to your application or function.

#### Customer Data Librarian Categories

- Data Librarian Deployment, page B-3
- Data Librarian Import Setup, page B-4
- Data Librarian Mapping Setup, page B-9
- Data Librarian Setup, page B-13
- Data Librarian Security, page B-15

See: Profile Categories, *Oracle Applications System Administrator's Guide - Maintenance*

#### Customer Data Librarian Profile Options

- HZ: Data Sharing and Security Rules for Data Librarians, page B-16
- HZ: Default Profile Attributes for Merge Mapping, page B-11
- HZ: Default Secondary Profile Attributes for Merge Mapping, page B-11
- HZ: Import Batch De-Duplication Match Rule, page B-7
- HZ: Import Registry De-Duplication Match Rule, page B-7
- HZ: Match Rule for Address Mapping Suggestions, page B-11
- HZ: Match Rule for Address Search, page B-12
- HZ: Match Rule for Identifying Duplicates with Smart Search, page B-14
- HZ: Match Rule for Organization Simple Search, page B-14
- HZ: Match Rule for Person Simple Search, page B-15
- HZ: Match Rule for Relationship Mapping Suggestions, page B-12
- HZ: Match Rule for Relationship Search, page B-12
- HZ: Merge Master Party Defaulting, page B-13
- HZ: Number of Workers for DQM Duplicate Identification Program, page B-4
- HZ: Preview Import Process Results, page B-8
- HZ: Protect Party Modeling Before Merge, page B-4
- HZ: Run Import Address Validation, page B-8
- HZ: Run Import Batch De-Duplication, page B-8
- HZ: Run Import Registry De-Duplication, page B-8
- HZ: Show Address Mapping Suggestions, page B-13
- HZ: Show Relationship Mapping Suggestions, page B-13
- IMC: Automate CSV File Load into TCA, page B-8
- IMC: CSV Batch De-Duplication Action, page B-8
- IMC: CSV Batch De-Duplication Match Rule, page B-8

- IMC: CSV Batch Registry Match Rule, page B-8
- IMC: Display Notes for Merge Request Mapping, page B-13
- IMC: Import Preview Processing Results, page B-7
- IMC: Import Run Address Validation, page B-7
- IMC: Import Run Batch De-Duplication, page B-7
- IMC: Import Run Registry Match, page B-8
- IMC: Run CSV Batch Address Validation, page B-8
- IMC: Run CSV Batch De-Duplication, page B-9
- IMC: Run CSV Batch Registry Match, page B-9

## Profile Option Category and Profile Options Descriptions

This section describes profile options by category.

The tables in this section provide profile option information as follows:

- The Default column displays either the default profile option value in italics, or No Default if none exists.
- The User Access column indicates whether you can view or update the profile option.
- The System Administration: Site, Application, Responsibility, and User columns indicate at which levels the system administrator can update these profile options.

The key for each table is:

- Update: You can update the profile option.
- View Only: You can view the profile option but cannot change it.
- No Access: You cannot view or change the profile option.

## Data Librarian Deployment Category

The table below lists the profile options that are used for Data Librarian deployment.

### Data Librarian Deployment Category

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
HZ: Number of Workers for DQM Duplicate Identification Program, page B-4	Update	Update	Update	Update	Update	Update
HZ: Protect Party Modeling Before Merge, page B-4	Update	Update	Update	Update	Update	Update

#### HZ: Number of Workers for DQM Duplicate Identification Program

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

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

#### HZ: Protect Party Modeling Before Merge

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

### Data Librarian Import Setup Category

The table below lists the profile options that are used for Data Librarian import setup.

**Data Librarian Import Setup Category**

<b>Profile Option</b>	<b>Default</b>	<b>User Access</b>	<b>System Administration: Site</b>	<b>System Administration: Application</b>	<b>System Administration: Responsibility</b>	<b>System Administration: User</b>
HZ: Import Batch De-Duplication Match Rule, page B-7	Update	Update	Update	Update	Update	Update
HZ: Import Registry De-Duplication Match Rule, page B-7	Update	Update	Update	Update	Update	Update
IMC: Import Preview Processing Results, page B-7	Update	Update	Update	Update	Update	Update
IMC: Import Run Address Validation, page B-7	Update	Update	Update	Update	Update	Update
IMC: Import Run Batch De-Duplication, page B-7	Update	Update	Update	Update	Update	Update
IMC: Import Run Registry Match, page B-8	Update	Update	Update	Update	Update	Update
HZ: Preview Import Process Results, page B-8	Update	Update	Update	Update	Update	Update

<b>Profile Option</b>	<b>Default</b>	<b>User Access</b>	<b>System Administration: Site</b>	<b>System Administration : Application</b>	<b>System Administration: Responsibility</b>	<b>System Administration: User</b>
HZ: Run Import Address Validation, page B-8	Update	Update	Update	Update	Update	Update
HZ: Run Import Batch De-Duplication, page B-8	Update	Update	Update	Update	Update	Update
HZ: Run Import Registry De-Duplication, page B-8	Update	Update	Update	Update	Update	Update
IMC: Automate CSV File Load into TCA, page B-8	Update	Update	Update	Update	Update	Update
IMC: CSV Batch De-Duplication Action, page B-8	Update	Update	Update	Update	Update	Update
IMC: CSV Batch De-Duplication Match Rule, page B-8	Update	Update	Update	Update	Update	Update
IMC: CSV Batch Registry Match Rule, page B-8	Update	Update	Update	Update	Update	Update
IMC: Run CSV Batch Address Validation, page B-8	Update	Update	Update	Update	Update	Update

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
IMC: Run CSV Batch De-Duplication, page B-9	Update	Update	Update	Update	Update	Update
IMC: Run CSV Batch Registry Match, page B-9	Update	Update	Update	Update	Update	Update

### **HZ: Import Batch De-Duplication Match Rule**

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

### **HZ: Import Registry De-Duplication Match Rule**

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

### **IMC: Import Preview Processing Results**

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

### **IMC: Import Run Address Validation**

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

### **IMC: Import Run Batch De-Duplication**

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

**IMC: Import Run Registry Match**

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

**HZ: Preview Import Process Results**

Determine whether or not to set the feature for previewing the import results.

**HZ: Run Import Address Validation**

Determine whether or not to run address validation for import.

**HZ: Run Import Batch De-Duplication**

Determine whether or not to run batch de-duplication for import.

**HZ: Run Import Registry De-Duplication**

Determine whether or not to run registry de-duplication for import.

**IMC: Automate CSV File Load into TCA**

Determine whether or not to run the data load process without inserting the file in the Data Librarian queue for manual run. The default CSV import options are used.

**IMC: CSV Batch De-Duplication Action**

Specify the default action for de-duplication in the interface tables for a CSV batch.

**IMC: CSV Batch De-Duplication Match Rule**

Specify the default match rule for de-duplication in the interface tables for a CSV batch. The default value is a DQM Match Rule in the Bulk Duplicates ID match rule type.

**IMC: CSV Batch Registry Match Rule**

Specify the default match rule for de-duplication between the interface tables and the TCA Registry for a CSV batch. The default value is a Match Rule in the Bulk Duplicates ID match rule type.

**IMC: Run CSV Batch Address Validation**

Determine whether or not to run address validation for a CSV batch for import.

## IMC: Run CSV Batch De-Duplication

Determine whether or not to run batch de-duplication for a CSV batch for import.

## IMC: Run CSV Batch Registry Match

Determine whether or not to run registry de-duplication for a CSV batch for import.

## Related Topics

Setting Up Import, *Oracle Customers Online Implementation Guide*.

Import Overview, *Oracle Customer Data Librarian User Guide*

## Data Librarian Mapping Setup Category

The table below lists the profile options that are used for setup of the Data Librarian mapping process.

### *Data Librarian Mapping Setup Category*

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
HZ: Default Profile Attributes for Merge Mapping, page B-11	Update	Update	Update	Update	Update	Update
HZ: Default Secondary Profile Attributes for Merge Mapping, page B-11	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Address Mapping Suggestions, page B-11	Update	Update	Update	Update	Update	Update

<b>Profile Option</b>	<b>Default</b>	<b>User Access</b>	<b>System Administration: Site</b>	<b>System Administration: Application</b>	<b>System Administration: Responsibility</b>	<b>System Administration: User</b>
HZ: Match Rule for Address Search, page B-12	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Relationship Mapping Suggestions, page B-12	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Relationship Search, page B-12	Update	Update	Update	Update	Update	Update
HZ: Merge Master Party Defaulting, page B-13	Update	Update	Update	Update	Update	Update
HZ: Show Address Mapping Suggestions, page B-13	Update	Update	Update	Update	Update	Update
HZ: Show Relationship Mapping Suggestions, page B-13	Update	Update	Update	Update	Update	Update
IMC: Display Notes for Merge Request Mapping, page B-13	Update	Update	Update	Update	Update	Update

## 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, page B-11 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, page B-11. The selected secondary method is used if the method from the other profile option does not provide a conclusive default.

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

## HZ: Match Rule for Address Mapping Suggestions

Define the match rule to use for generating default address mapping suggestions. You can use the DL ADDRESS DEFAULT seeded match rule. See: DL ADDRESS DEFAULT, *Oracle Trading Community Architecture Reference Guide*. If you leave this profile option blank, a default match rule is used to generate address mappings.

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

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

## HZ: Match Rule for Address Search

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

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

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

## HZ: Match Rule for Relationship Mapping Suggestions

Define the match rule to use for generating default relationship mapping suggestions. You can use the DL RELATIONSHIP DEFAULT seeded match rule. See: DL RELATIONSHIP DEFAULT, *Oracle Trading Community Architecture Reference Guide*. If you leave this profile option blank, a default match rule is used to generate relationship mappings.

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

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

## HZ: Match Rule for Relationship Search

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

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

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

### **HZ: Merge Master Party Defaulting**

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

If multiple parties fulfill the condition for these methods:

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

### **HZ: Show Address Mapping Suggestions**

Enter *Yes* or *No* to determine whether address mapping suggestions are displayed by default or not. The match rule that is set for the HZ: Match Rule for Address Mapping Suggestions profile option, page B-11 determines the mapping suggestions.

### **HZ: Show Relationship Mapping Suggestions**

Enter *Yes* or *No* to determine whether relationship mapping suggestions are displayed by default or not. The match rule that is set for the HZ: Match Rule for Relationship Mapping Suggestions profile option, page B-12 determines the mapping suggestions.

### **IMC: Display Notes for Merge Request Mapping**

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

### **Related Topics**

Setting Up De-Duplication, page 3-2

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

### **Data Librarian Setup Category**

The table below lists the profile options that are used for setup of Data Librarian process.

## Data Librarian Setup Category

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
HZ: Match Rule for Identifying Duplicates with Smart Search, page B-14	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Organization Simple Search, page B-14	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Person Simple Search, page B-15	Update	Update	Update	Update	Update	Update

### HZ: Match Rule for Identifying Duplicates with Smart Search

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

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

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

### HZ: Match Rule for 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 HZ\_ORG\_SIMPLE\_SEARCH\_RULE seeded match

rule. See: HZ\_ORG\_SIMPLE\_SEARCH\_RULE, *Oracle Trading Community Architecture Reference Guide*.

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

**Important:** This match rule also applies to the organization simple search on the Home and Organizations pages. Select a match rule that works for both purposes.

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

### **HZ: Match Rule for Person Simple Search**

Specify the seeded or user-defined match rule for determining the search criteria and results for the person simple search. Use match rules with the Search purpose, but do not use a match rule that has the Organization Name attribute. The profile option defaults to the HZ\_PERSON\_SIMPLE\_SEARCH\_RULE seeded match rule. See: HZ\_PERSON\_SIMPLE\_SEARCH\_RULE, *Oracle Trading Community Architecture Reference Guide*.

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

**Important:** This match rule also applies to the person simple search on the Home and Organizations pages. Select a match rule that works for both purposes.

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

### **Data Librarian Security Category**

The table below lists the profile options that are used for setup of Data Librarian security.

### Data Librarian Security Category

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
HZ: Data Sharing and Security Rules for Data Librarians, page B-16	Update	Update	Update	Update	Update	Update

### HZ: Data Sharing and Security Rules for Data Librarians

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

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

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