

Oracle® Enterprise Data Quality for Product Data

R12 PIM Connector Installation Guide

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Contents

Preface	v
Audience	v
Documentation Accessibility	v
Related Documents	v
Conventions	vi
1 Introduction	
2 Getting Started	
Installation Path	2-1
Installation Prerequisites	2-1
Preparing for Installation	2-2
R12 PIM Connector Package Contents	2-3
3 Creating the d1s User and Schema	
Creating the d1s User	3-1
Installing the Database Schema	3-1
4 Installing the Application Files	
R12 PIM Connector Application Server Template Files	4-1
Installing the R12 PIM Connector Application Server Template Files	4-1
Updating the R12 PIM Connector Application Server Template Files	4-2
Installing the R12 PIM Connector Application Client Template Files	4-3
Enterprise DQ for Product DSA Overview	4-3
Default Entries in DSAs	4-4
Creating and Updating Semantic Models from PIM Metadata Import	4-4
Importing Alternate Catalog Metadata	4-4
Creating and Updating the Semantic Cache	4-4
Creating Production Batches	4-4
Processing a Batch of Data Thorough the Cleansing and Matching Process	4-5
Secondary Data Service Applications for Reprocess and Apply	4-5
Preconfigured Governance Studio Projects	4-5
Preconfigured Excel Spreadsheet Template	4-6

Preface

This manual highlights the installation and configuration of Oracle Enterprise Data Quality for Product Data R12 PIM Connector.

By extending Enterprise DQ for Product capabilities, Oracle enables customers to improve the accuracy, completeness, and integrity of their master product data.

To understand the concepts presented, you must use this reference guide in conjunction with the Enterprise DQ for Product documents listed in "[Related Documents](#)" on page 2-v.

You must have Enterprise DQ for Product client software installed on your computer.

The guide uses the Vision Demo Database as a means to provide access to a common set of data, which is available to use as examples and validate the setup and configuration of the server. The guide will use the Item Class Category Name of Capacitors under the Item Class of Passives.

Note: Enterprise DQ for Product is only certified with the Oracle Site Hub and Oracle Product Hub for Retail Media Pack.

Audience

You should have a basic understanding of the DataLens Technology.

This document is intended for IT administrators.

Documentation Accessibility

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Related Documents

For more information, see the following documents in the documentation set:

- The *Oracle Enterprise Data Quality for Product Data R12 PIM Connector User's Guide* provides highlights of the core process steps and features of Enterprise DQ for Product R12 PIM Connector.
- The *Oracle Enterprise Data Quality for Product Data R12 PIM Connector API Interface Guide* provides information about installing and using the R12 PIM Connector API.
- The *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Installation Guide* provides detailed Oracle DataLens Server installation instructions.
- The *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Administration Guide* provides information about installing and managing an Oracle DataLens Server.
- The *Oracle Enterprise Data Quality for Product Data R12 PIM Connector API Interface Guide* provides information about using the R12 PIM Connector API.
- The *Oracle Enterprise Data Quality for Product Data COM Interface Guide* provides information about installing and using the Oracle DataLens Server COM APIs.
- The *Oracle Enterprise Data Quality for Product Data Java Interface Guide* provides information about installing and using the Oracle DataLens Server Java APIs.
- The *Oracle Enterprise Data Quality for Product Data Application Studio Reference Guide* provides information about creating and maintaining Data Service Applications (DSAs).
- The *Oracle Enterprise Data Quality for Product Data AutoBuild Reference Guide* provides information about creating an initial data lens based on existing product information and data lens knowledge.
- The *Oracle Enterprise Data Quality for Product Data Knowledge Studio Reference Guide* provides information about creating and maintaining data lenses.
- The *Oracle Enterprise Data Quality for Product Data Governance Studio Reference Guide* provides information about creating and maintaining Data Service Applications (DSAs).
- The *Oracle Enterprise Data Quality for Product Data Glossary* provides definitions to commonly used Enterprise DQ for Product technology terms.
- The *Oracle Enterprise Data Quality for Product Data Services for Excel Reference Guide* provides information about creating a DSA based on data contained in a Microsoft Excel worksheet.
- The *Oracle Enterprise Data Quality for Product Data Task Manager Reference Guide* provides information about managing tasks created with the Task Manager or Governance Studio applications.

See the latest version of this and all documents listed at the Oracle Enterprise Data Quality for Product Data Documentation Web site at:

http://download.oracle.com/docs/cd/E20593_01/index.htm

Conventions

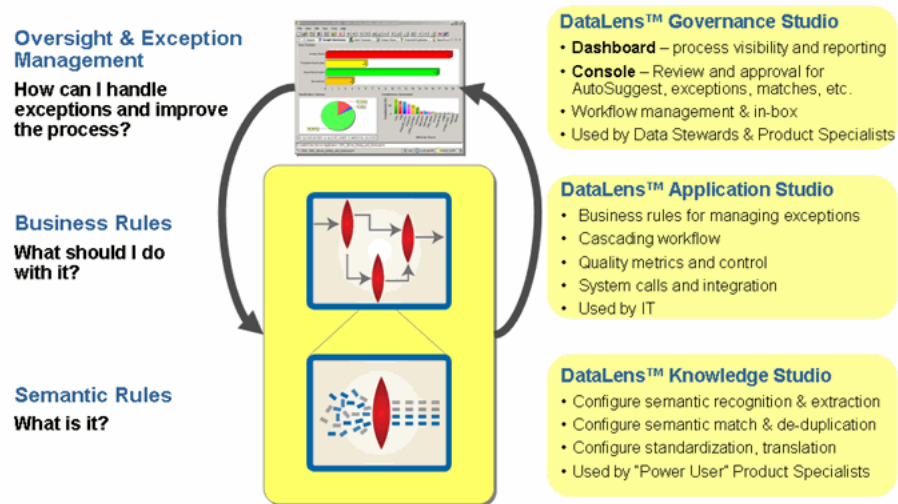
The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, text that you enter, or a file, directory, or path name.
monospace	Boldface, monospace type indicates commands or text that you enter.

Introduction

Oracle DataLens Server is built on industry-leading DataLens™ Technology to standardize, match, enrich, and correct product data from different sources and systems. The core DataLens Technology uses patented semantic technology designed from the ground up to tackle the extreme variability typical of product data.

Oracle Enterprise Data Quality for Product Data, formerly Oracle Product Data Quality, uses three core DataLens Technology modules: Governance Studio, Knowledge Studio, and Application Studio. The following figure illustrates the process flow of these modules.



The Oracle DataLens Server can be configured to run with multiple servers:

- Oracle DataLens Administration Server
- Oracle DataLens Transform Server

The administration of all servers in a multi-server configuration is controlled with the Oracle DataLens Administration Server. The purpose of the Administration Server is to manage the various administrative tasks of the servers for the server groups (referred to as Transform Servers) and can itself serve as its own Transform Server when installed alone in a single node configuration. By spreading the data processing load across multiple servers the Oracle DataLens Server system provides scalability and configuration control over the various functional areas involved in developing, testing, and ultimately executing Oracle DataLens jobs.

The type of Oracle DataLens Server Group that a Transform Server belongs to controls the individual server functionality. A server group may contain one or many physical servers. There are three server groups:

- Development Server Group
- Production Server Group
- Quality Assurance Server Group

The Server Groups contain individual Oracle DataLens Servers on physical machines that can **load balance** among servers within the group. The data lenses and DataLens Service Applications (DSAs) are deployed from one group to the next beginning with the development group, then migrating to the Quality Assurance Group for testing before arriving in the Production Group for deployment to production. This multiple group migration function facilitates an enterprise business process where multiple functional areas work on data lens objects in stages before releasing them to production.

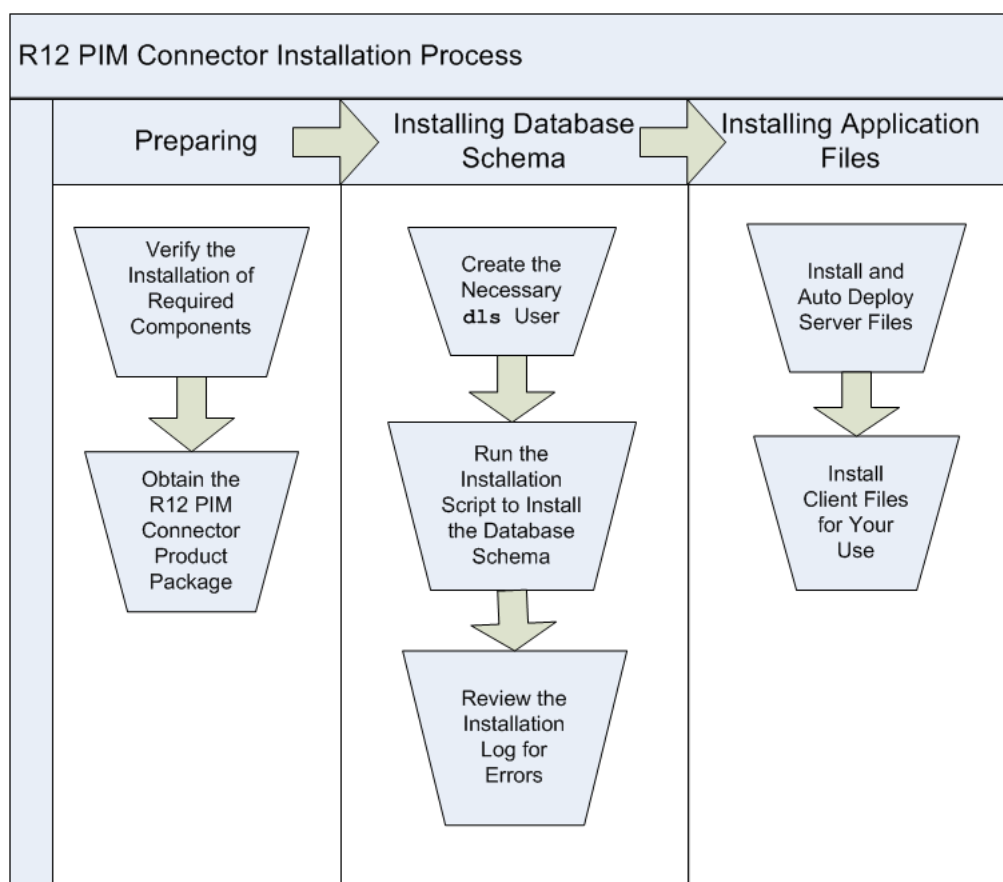
The integration of Oracle R12 Product Information Management (PIM) and Enterprise DQ for Product (EDQP) adds a package called the "R12 PIM Connector" to the Enterprise DQ for Product solution upload package.

Getting Started

This chapter provides information you need to get started installing the R12 PIM Connector, including installation prerequisites, preparing to install, and the components in the product package.

Installation Path

The R12 PIM Connector installation involves three main stages as follows:

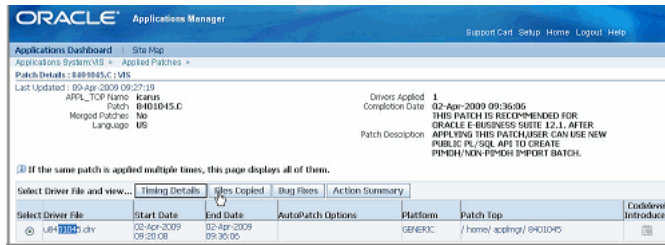


Installation Prerequisites

The following components need to be installed before installing the Enterprise DQ for Product R12 PIM Connector:

1. Install the Oracle E-Business Suite (EBS) server including the latest patch sets.
For 12.1 you must install the Oracle Batch Creation API patch (patch number 8401045:R12.EGO.C).

You can check the patch version from the Applications Manager as follows:



2. Install and configure Enterprise DQ for Product version 5.6.2. For more information, see *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Installation Guide* and *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Administration Guide*.
3. Install Enterprise DQ for Product Services for Excel Add-in version 5.6.2 on your client machines. For more information, see *Oracle Enterprise Data Quality for Product Data Services for Excel Reference Guide*.

Preparing for Installation

You must obtain the current R12 PIM Connector product, which is delivered as a patch, from the Oracle Support Web site.

Locate and download the R12 PIM Connector version 5.6.2 patch:

1. Browse to the My Oracle Support Web site:
<https://support.oracle.com>
2. Log in or register.
3. Click the **Patches & Updates** tab.
4. Click **Product or Family (Advanced Search)**.
5. Search for Oracle Enterprise Data Quality for Product Data by beginning to enter the name in the **Product** field and then select it when it is displayed in the list.
6. Select the **Release** list, click the arrow adjacent to the Oracle Enterprise Data Quality for Product Data folder.
7. Select the **EDQP 5.6** release and then click **Close**.
8. Click **Search**.
9. Select the R12 PIM Connector version 5.6.2 patch from the list of patches, and then click **Download**.
10. Click the patch file name, and then save it to a temporary directory.
11. Change directories to the temporary directory.
12. Unzip the patch zip file into the temporary directory.

R12 PIM Connector Package Contents

The R12 PIM Connector product package contains the following:

- `dls_pim_connector_install.zip` - R12 PIM Connector EBS installation script and integration files.
- `edqp_client_templates.zip` - Governance Studio and Services for Excel client template files and contains the following directory structure:

```
edqp_client_templates
  spreadsheet_templates
  gov_studio_projects
```

- `edqp_server_templates.zip` - R12 PIM Connector data lens and DSA template files that can be automatically deployed to your Oracle DataLens Server and contains the following directory structure:

```
edqp_server_templates
  autodeploy
    dsa
    lens
```

Creating the d1s User and Schema

This chapter describes how to create the d1s user, install the R12 PIM Connector database schema, and associate the installed database schema with the d1s user.

Note: This chapter presents one EBS environment. Your EBS environment may be different so the computer responses will differ though the commands you execute do not.

Creating the d1s User

The R12 PIM Connector API components are installed on the EBS using Oracle Database user account, d1s. Create the d1s user:

1. Log into your EBS database server as user, applmgr or the user installed the original EBS instance.
2. Ensure that your login user environment is sourced.

Following is an example of how to source the applmgr environment file:

```
. /d01/oracle/VIS/apps/apps_st/appl/APPSVIS_system1.env
```

3. Check that the environment is set correctly:

```
echo $TWO_TASK
```

The return value should be the SID of the EBS database server.

4. Copy the d1s_pim_connector_install.zip file that you extracted from the patch set to a temporary directory on your EBS database server.
5. Unzip d1s_pim_connector_install.zip.
6. Change directories to the d1s_pim_connector_install directory.

For example, `cd /tmp/d1s_pim_connector_install`

7. Create the R12 PIM Connector d1s user in the EBS database server:

```
sqlplus system/manager@VIS < d1s_user_creation.sql
```

Ensure that the d1s user creation successfully completes and no errors are displayed.

Installing the Database Schema

The main installation script, d1s_pim_connector_install.sh, installs tables, views, packages, etc. into the EBS d1s database user. The necessary grants and privileges to

the tables accessed by the Enterprise DQ for Product R12 PIM Connector are configured in the `apps/apps` schema.

- The installation script uses the existing *Transaction* tablespace and for the installation of the DLS tables in indexes such as the semantic key cache. This is consistent with current Oracle practice (see MetaLink note 248857.1 under the Product tablespaces link).
 - The temporary tables used by the Enterprise DQ for Product will be written to the Interface tablespace (see MetaLink note 248857.1 under the Product tablespaces link).
 - The installation script creates a new schema called `dls` that is granted quota on the Transaction and Interface table spaces.
1. While still logged into the EBS Server as `applmgr` and in the `dls_pim_connector_install` directory, change the file permissions of the R12 PIM Connector installation script:

```
chmod +x *.sh
```

2. Install the database schema:

```
./dls_pim_connector_install.sh
```

Note: You may have to change the file permissions to execute this script.

Please enter Apps Schema Name for VIS:

3. Enter:

```
apps
```

Please enter Apps Password for VIS:

4. Enter:

```
apps
```

Please enter DLS Schema Name for VIS:

5. Enter:

```
dls
```

Please enter DLS Password for VIS:

6. Enter:

```
dls
```

The `dls` database schema has now been populated with the tables, views, packages, synonyms and triggers. The `apps` schema has also been populated with the grants and synonyms needed to run the Enterprise DQ for Product R12 PIM Connector.

A log file is written to the `tmp` directory of the `applmgr` user.

7. Review the installation log file, `dls_inst_####.log`, and ensure that there were no errors.

The following erroneous error message should be ignored:

```
Warning: Package created with compilation errors.
```

```
.
```

Errors for PACKAGE DLS_CONNECTOR_PVT:

.

LINE/COL ERROR

49/3 PLS/SQL: Declaration ignored

51/66 PLS-00201: identifier 'DLS_CONNECTOR_PUB.G_SEMANTICATTR' must be
declared

Installing the Application Files

Enterprise DQ for Product R12 PIM Connector includes a set of application components that the users use to process data. These include a set of DSAs, Governance Studio Projects, and AutoBuild application templates. Each of these is described in this chapter.

R12 PIM Connector Application Server Template Files

The R12 PIM Connector Application Server Template Files are a collection of DSAs that must be present on your Oracle DataLens Server to process your data.

Configure your Oracle DataLens Server to use the Application Server Template files with one of the following sections:

Files Do Not Exist on Server

Use "[Installing the R12 PIM Connector Application Server Template Files](#)" on page 4-1.

Files Exist on Server

Use "[Updating the R12 PIM Connector Application Server Template Files](#)" on page 4-2.

Installing the R12 PIM Connector Application Server Template Files

Install the R12 PIM Connector application server template files:

1. On your Oracle DataLens Administration Server system, log in using the administrator user you established when installing the server in preparation to copy files.

Note: This step does *not* refer to the Oracle DataLens Administration Server Web page.

2. Copy the `edqp_server_templates.zip` file that you extracted from the patch set to the `local` directory of your Oracle DataLens Administration Server. By default, these directories are:

On Linux and UNIX: `/opt/Oracle/Middleware/opdq/local`

On Windows: `C:\Oracle\Middleware\opdq\local`

Note: The preceding directories are the defaults when installing your Oracle DataLens Server; your installation directory may vary.

3. Change directories to the local directory of your Oracle DataLens Administration Server.
4. Unzip the `edqp_server_templates.zip` file.

This automatically deploys (autodeploys) the DSA and data lens template files to your Oracle DataLens Server. The Oracle DataLens Administration Server polls the local directory every 10 minutes and attempts to autodeploy the DSA and data lens template files that are placed in the respective folders under the autodeploy parent folder.
5. Log out of the Oracle DataLens Administration Server system.
6. Wait 10 minutes to ensure that the server templates have been autodeployed.
7. Log into the Oracle DataLens Server Administration Web page.

For more information about these Web pages, see *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Administration Guide*.
8. Verify that the `AUPIM_DSAs` and `AUPIM_Capacitors.project` data lens have been autodeployed.

Updating the R12 PIM Connector Application Server Template Files

You can update previously installed R12 PIM Connector application server template files using the following steps:

1. Log into the Oracle DataLens Server Administration Web page.

For more information about these Web pages, see *Oracle Enterprise Data Quality for Product Data Oracle DataLens Server Administration Guide*.
2. In the **Server** section, click **Data Lenses**.
3. Unlock the `AUPIM_Capacitors.project` data lens.
4. In the **Server** section, click **DSAs**.
5. Unlock any locked DSA that is prefixed with `AUPIM_`.
6. On your Oracle DataLens Administration Server system, log in using the administrator user you established when installing the server in preparation to copy files.

Note: This step does *not* refer to the Oracle DataLens Administration Server Web page.

7. Copy the `edqp_server_templates.zip` file that you extracted from the patch set to the local directory of your Oracle DataLens Administration Server. By default, these directories are:

On Linux and UNIX: `/opt/Oracle/Middleware/opdq/local`

On Windows: `C:\Oracle\Middleware\opdq\local`

Note: The preceding directories are the defaults when installing your Oracle DataLens Server; your installation directory may vary.

8. Change directories to the local directory of your Oracle DataLens Administration Server.

9. Unzip the `edqp_server_templates.zip` file.
This automatically deploys (autodeploys) the DSA and data lens template files to your Oracle DataLens Server. The Oracle DataLens Administration Server polls the `local` directory every 10 minutes and attempts to autodeploy the DSA and data lens template files that are placed in the respective folders under the `autodeploy` parent folder.
10. Log out of the Oracle DataLens Administration Server system.
11. Wait 10 minutes to ensure that the server templates have been autodeployed.
12. Return to your Oracle DataLens Server Administration Web page.
13. Verify that the DSAs prefixed with `AUPIM_` and the `AUPIM_Capacitors.project` data lens have been autodeployed.

Installing the R12 PIM Connector Application Client Template Files

Install the R12 PIM Connector application client template files:

1. On your Enterprise DQ for Product client system, copy the `edqp_client_templates.zip` file from the temporary directory where you unzipped the R12 PIM Connector patch file to your Desktop.
2. Unzip the `edqp_client_templates.zip` file to your Desktop.
The preconfigured AutoBuild Excel workbook in the `spreadsheet_templates` folder. For more information about these workbook, see "[Preconfigured Excel Spreadsheet Template](#)" on page 4-6.
The preconfigured Governance Studio projects are in the `gov_studio_projects` folder.
3. Start the Governance Studio and import each project file (`*.ams`) in the `../desktop/edqp_client_templates/gov_studio_projects` directory.
For more information about importing, see *Oracle Enterprise Data Quality for Product Data Governance Studio Reference Guide*. For more information about these projects, see "[Preconfigured Governance Studio Projects](#)" on page 4-5.
4. Start the Knowledge Studio and check out the `DLS_Import_Template` data lens.

Note: Before using the AutoBuild application, delivered in Services for Excel, the `DLS_Import_Template` data lens *must* be checked out from the Oracle DataLens Server. For information about checking data lenses in and out of the Enterprise DQ for Product, see *Oracle Enterprise Data Quality for Product Data Knowledge Studio Reference Guide*.

Enterprise DQ for Product DSA Overview

There are four main categories of DSAs that define the architecture of Enterprise DQ for Product.

- Metadata Import
 - Semantic Model build from PIM metadata extract.
 - Alternate Catalog build from PIM metadata extract.

- Creating and updated the semantic cache information that is used by the integration services to perform semantic matches.
- Creating a new batch from a query of Production data.
- Processing interface table batches thorough the Integration Services DSA and updating the results back in the interface tables.

Default Entries in DSAs

All DSAs shipped as part of the Enterprise DQ for Product R12 PIM Connector have default entries that allow for a quick configuration. The following default entries will need to be reviewed and configuration changes may be required. These changes are outlined in the *Oracle Enterprise Data Quality for Product Data R12 PIM Connector User's Guide*.

Default Database Connection

The default database connection name for all DSAs is, `PIM_Connector`. This database connection will be pointing to a fictitious server name with a fictitious user and password that will need to be configured as part of the initial server configuration.

Default Data Lens

The default data lens for all DSAs that process items in Enterprise DQ for Product is `AUPIM_Capacitors.project`. This data lens contains semantic models that work with the Capacitors Item Class category in the Vision Database installed with most R12 PIM Connector systems. A process of testing the system using this sample lens and then updating this data lens with actual customer specific data lenses is documented in Enterprise DQ for Product.

Creating and Updating Semantic Models from PIM Metadata Import

`AUPIM_CREATE_SEMANTIC_MODEL`

This DSA is used by AutoBuild to generate data lenses from the PIM metadata. This DSA is typically run using the Enterprise DQ for Product Services for Excel to create the data needed by the AutoBuild application. This data includes attributes and sample descriptions.

Importing Alternate Catalog Metadata

`AUPIM_EXTRACT_ALT_CATALOGS`

This DSA is used by the AutoBuild application to import one or more alternate catalogs and create classification schemas inside a selected data lens. This DSA is typically run using the Services for Excel to create the data needed by the AutoBuild application. This data includes the metadata for the Alternate Catalog entered during the run including the id and parent information.

Creating and Updating the Semantic Cache

`AUPIM_CREATE_SEMANTIC_CACHE`

This DSA is run as a nightly job to update the Semantic Index from Oracle PIM Production data; this semantic index is used for matching and checking for duplicates.

Creating Production Batches

Oracle PIM System users will be able to process data from the interface tables where the source system is an external source system or where the source system is the PIM Data Hub. In order to process data from external source systems, the PIM users will

continue to use the existing methods of loading data into the interface tables, usually the Excel Import Templates or a direct database load. The PIM users will also have a new feature to load data directly from PIM Production tables into the interface tables using a batch creation process that is included in this application.

AUPIM_PROCESS_EXTERNAL_DATA

This DSA is run to insert your external data into interface tables by the Oracle DataLens Server.

AUPIM_CREATE_PRODUCTION_BATCH

This DSA is run to create a new batch of data from the PIM Production tables. This batch will then be processed by the Oracle DataLens Server and updated back into interface tables.

Processing a Batch of Data Thorough the Cleansing and Matching Process

AUPIM_MAIN_PROCESS

This DSA is run as the main DSA from the DGS. This will take an Oracle PIM batch and clean/standardize/classify/extract attrs/etc from the description and load it into the DGS for further processing. The batches are populated with data from external systems or as pulls from the PIM Production data.

Secondary Data Service Applications for Reprocess and Apply Secondary DSAs called by the main process as previously described that Reprocess or Apply the changes to the interface table.

DSA Name	Notes
AUPIM_REPROCESS	<p>Reprocesses rows from the following outputs of the Main Process DSA:</p> <ul style="list-style-type: none"> ■ Dups within Batch ■ Match on Mfg Part ■ Match Against PIM ■ Items for Enrichment ■ Exceptions <p>Based on specific process flags, this DSA will reroute the items back to the Governance Studio Main project, or will update the rows back in the interface tables with the correct match_status.</p>
AUPIM_APPLY_RESULTS	Applies rows from the Ready for Load step and updates all pertinent fields in the interface tables.
AUPIM_EXTRACT_ALT_CATALOGS	Applies rows from the Alternate Catalog Review and updates all pertinent fields related to Alternate Catalogs
AUPIM_SET_BATCH_TO_ACTIVE	Updated the batch status from Pending to Active so that the PIM user can go into the Import Workbench UI and invoke the import process.

Preconfigured Governance Studio Projects

Enterprise DQ for Product R12 PIM Connector includes the following Governance Studio project. This project is used by users to create batch specific Governance Studio projects to process interface batch data. The process is documented in the *Oracle Enterprise Data Quality for Product Data R12 PIM Connector User's Guide*.

AUPIM_Cleansing_and_Matching

The main process that runs the main Data Service Applications that cleanse and match the items in the interface tables.

AUPIM_Create_Production_Batch

The process that automatically creates a new Import Workbench batch from a set of production items.

AUPIM_CREATE_SEMANTIC_CACHE

This administrative process can be run thorough the Governance Studio or can be scheduled to run as a nightly or weekly process. This should be run by System Administrators when not batches are being processed.

For information about how these project templates are used, see *Oracle Enterprise Data Quality for Product Data R12 PIM Connector User's Guide*.

Preconfigured Excel Spreadsheet Template

The Enterprise DQ for Product R12 PIM Connector includes the following Excel workbook for use with the AutoBuild application. This preconfigured workbook contain VBA applications that are used to export PIM metadata and to create a set of semantic models with one or more associated alternate catalogs for use in cleansing and matching your specific product data.

CapacitorsExternalBatchTestInput.xlsx

Use this workbook to test your input data prior to executing a PIM external batch load.

For information about how the AutoBuild templates are used to create a data lens and add an alternate catalog to the data lens, see *Oracle Enterprise Data Quality for Product Data R12 PIM Connector User's Guide*.