

Oracle® Customer Data Librarian

User Guide

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Oracle Customer Data Librarian User Guide, Release 12.2

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Primary Author: Laurel Dale

Contributor: Ajai Singh, Amy Wu, Harikrishnan Radhakrishnan, Nishant Singhai, Ramanasudhir Gokavarapu, Shankar Bharadwaj

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Send Us Your Comments

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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?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Customer Data Librarian User 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 E-Business Suite, we suggest you attend one or more of the Oracle E-Business Suite training classes available through Oracle University.

See Related Information Sources on page viii for more Oracle E-Business Suite product information.

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Structure

- 1 Overview
- 2 De-Duplication

- 3 Party Purge
- 4 Party Maintenance
- 5 Customer Merge
- 6 Import
- A Standard Navigation Paths

Related Information Sources

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

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 Oracle 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.

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently
- **Online Help** - Online help patches (HTML) are available on My Oracle Support.
- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.
- **Oracle Electronic Technical Reference Manual** - The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter and query data, and run concurrent requests using the user interface (UI) of Oracle E-Business Suite. It includes information on setting preferences and customizing the UI. In addition, this guide describes accessibility features and keyboard shortcuts for Oracle E-Business Suite.

Guides Related to This Product

Oracle Common Application Calendar Implementation Guide

This guide describes how to define tasks and note types, set up task statuses and status transition rules, define task priorities, set up data security, and map notes and references to source objects such as a sales lead to Task Manager. In addition, it describes how to create users and run concurrent programs to retrieve new and updated tasks.

Oracle Common Application Calendar User Guide

Oracle Common Application Calendar enables you to manage daily tasks and appointments, create and maintain notes, and schedule resources. It provides a central place to store and view resource schedules, utilization, and availability. It also enables you to synchronize your calendar with external calendars such as Microsoft Outlook or handheld devices.

Oracle Customer Data Librarian Implementation Guide

Oracle Customer Data Librarian includes all of the functionality of Oracle Customers Online with the additional features of maintaining the quality of customer data. Therefore, you must first implement Oracle Customers Online fully. Then, use this guide to assign responsibilities and access to users and set the necessary profile options for data librarian deployment, data import, mapping, search and duplication removal, and data security.

Oracle Customers Online Implementation Guide

This guide describes how to set up customer accounts, set up additional display attributes, set up data quality management, define the source systems for customer data and map customers to the source system. Before you can use Oracle Customers Online, you must implement Oracle Common Application Calendar, Oracle Customer Interaction History, and Oracle Trading Community Architecture. Oracle Customers Online features and data come from the marketing and sales applications and the additional applications of Oracle Order Management, Oracle Credit Management, and Oracle Receivables.

Oracle Customers Online User Guide

Oracle Customers Online enables you to view, create, and maintain customer or party information, create customer relationships and hierarchies, manage tasks and employees for your organization, and use reports to view customer profile trends and data quality information. You can import customer data from external sources, and administer and control the usage of this data across the Oracle E-Business Suite.

Oracle Financials Concepts Guide

This guide discusses the conceptual architecture of Oracle Financials. It introduces you to the financial concepts used in the application, and helps you compare real world business, organization, and processes to those used in the applications. Understanding the concepts enables you to exploit the features of the Oracle Financials suite of applications for better financial performance, reporting, control, compliance, and security.

Oracle Financials Implementation Guide

This guide describes how to implement the Oracle Financials E-Business Suite. It takes you through the steps of setting up your organizations, including legal entities, and their accounting, using the Accounting Setup Manager. You can find information on intercompany accounting and sequencing of accounting entries with relevant examples.

Oracle Receivables Implementation Guide

This guide provides you with information on how to implement Oracle Receivables for your business activities. It helps you to set up your accounting distributions, your accounting structure, and various rules used to process transactions for accounting, charges, payments, and collections. You can learn how to use descriptive flexfields, Receivables system options, lookups, and profiles options to customize application behavior and define comprehensive defaults that Receivables uses to make data entry more efficient and accurate.

Oracle Receivables Reference Guide

This guide describes the APIs and open interfaces that Oracle Receivables provides. You can use these to extend Oracle Receivables functionality. For example, you can learn how to use AutoLockbox to create and apply receipts and AutoInvoice to import and validate transactions from other systems. You can also learn how to archive and purge Receivables data.

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 enables you to define entities in the TCA Registry, create relationships, search, prevent duplication, and control access. In addition, you can use this guide to define time zones and phone formats, configure adapters for the processing of data in the TCA Registry, define sources that provide data for specific entities, and create user-defined attributes to extend the registry. You can administer these TCA tools and features from the Administration tab using the Trading Community Manager responsibility. This tab is also available in Oracle Customers Online and Oracle Customer Data Librarian.

Oracle Trading Community Architecture Reference Guide

This guide provides information including a comprehensive glossary to supplement the documentation for Oracle Trading Community Architecture and to help you understand products in the Oracle Customer Data Management family. It describes customer interface tables and the interface tables used for bulk import of data from external sources, and D&B data elements. In addition, you can learn about available relationship types, available replacement words and attributes for Data Quality Management data, available matching rules for various TCA administration tasks, and the results and impact of the party and account merge processes initiated in Oracle E-Business Suite applications.

Oracle Trading Community Architecture Technical Implementation Guide

This guide provides technical information on the various integration features such as APIs and business events that you can avail to connect into external systems and transact data between these systems through a data hub using the Trading Community Architecture data model. This means that you can create or update in one system and ensure that the change is reflected in the other systems. You can manipulate data at the granular Oracle Trading Community Architecture entity level such as party site or party relationship or at the higher business object level such as person. Use this guide to learn about available APIs, their functions, parameters, and validations and how to use them. You can also find details on the business events and how to subscribe to them.

Oracle Trading Community Architecture User Guide

Oracle Trading Community Architecture (TCA) maintains information including relationships about parties, customers, organizations, and locations that belong to your commercial community in the TCA Registry. This guide enables you to use the features and user interfaces provided by TCA and by other Oracle E-Business Suite applications to view, create, and update Registry information. For example, you can import batches of party data in bulk from external source systems into the TCA Registry, merge duplicate parties, sites, and customer accounts, generate time zones for phones and locations, and run various customer reports.

Installation and System Administration

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite 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 E-Business Suite CRM System Administrator's Guide

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite 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 E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle E-Business Suite development staff. It describes the UI for the Oracle E-Business Suite products and tells you how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Approvals Management Implementation Guide

This guide describes transaction attributes, conditions, actions, and approver groups that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

Oracle Diagnostics Framework User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

Oracle E-Business Suite Flexfields Guide

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

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle E-Business Suite Multiple Organizations Implementation Guide

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operating units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

Oracle e-Commerce Gateway Implementation Guide

This guide describes implementation details, highlighting additional setup steps needed for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

Oracle e-Commerce Gateway User's Guide

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

Oracle iSetup User's Guide

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

Oracle Product Hub Implementation Guide

This guide explains how to set up hierarchies of items using catalogs and catalog categories and then to create user-defined attributes to capture all of the detailed information (such as cost information) about an object (such as an item or change order). It also explains how to set up optional features used in specific business cases; choose which features meet your business' needs. Finally, the guide explains the set up steps required to link to third party and legacy applications, then synchronize and enrich the data in a master product information repository.

Oracle Product Hub User's Guide

This guide explains how to centrally manage item information across an enterprise, focusing on product data consolidation and quality. The item information managed includes item attributes, categorization, organizations, suppliers, multilevel structures/bills of material, packaging, changes, attachments, and reporting.

Oracle Web Applications Desktop Integrator Implementation and Administration Guide

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite 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 Developer's Guide

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

Oracle Workflow User's Guide

This guide describes how Oracle E-Business Suite users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle XML Gateway User's Guide

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

Oracle XML Publisher Administration and Developer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing Oracle E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions. This guide is available through the Oracle E-Business Suite online help.

Oracle XML Publisher Report Designer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts. This guide is available through the Oracle E-Business Suite online help.

Training and Support

Training

Oracle offers a complete set of training courses to help you master your product and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may

want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep your product working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle **STRONGLY RECOMMENDS** that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

Overview

This chapter covers the following topics:

- Introduction to Oracle Customer Data Librarian
- Major Features of Oracle Customer Data Librarian

Introduction to Oracle Customer Data Librarian

Oracle Customer Data Librarian (CDL) provides tools for individuals who are responsible for managing the quality of their organizations' customer information. CDL focuses on the three Cs of customer data quality: consolidation, cleanliness, and completeness. A quality customer database benefits the entire enterprise, helping everyone to make real-time decisions with the confidence that the supporting data is accurate, timely, and complete.

Use Oracle Customer Data Librarian to maintain the quality of the Oracle Trading Community Architecture (TCA) Registry, the central repository of customer and other data that Oracle Customer Data Librarian and other applications in the Oracle E-Business Suite use. See: *Introduction to Oracle Trading Community Architecture, Oracle Trading Community Architecture User Guide*.

Both TCA and CDL belong to the Oracle Customer Data Management (CDM) product family. CDM also includes Oracle Customers Online (OCO). Oracle Customer Data Librarian contains all of the Customers Online features. See: *Introduction to Oracle Customers Online, Oracle Customers Online User Guide*.

For reference material that supplements not only TCA but CDM product documentation, see *Oracle Trading Community Architecture Reference Guide*. This guide provides a glossary of terms for CDM, including Oracle Customer Data Librarian.

Customer Data Quality

- Consolidation

- Import customer data from external sources into the TCA Registry.
- Map records between external source systems and the TCA Registry, to tie customer information from multiple sources to the Registry and maintain a single, enterprise-wide view of your customer information.
- **Cleanliness**
 - Resolve duplicate parties within the TCA Registry, as well as duplicate information within a party.
 - Permanently purge parties from the TCA Registry.
 - Maintain party information such as status, internal indicator, and certification level.
- **Completeness**
 - Enrich customer data with information from third party data sources, such as D&B.

Related Topics

Major Features of Oracle Customer Data Librarian, page 1-2

Major Features of Oracle Customer Data Librarian

These features are available only in Oracle Customer Data Librarian.

- Data Quality tab
 - **Merge Requests** and **System Duplicate Identification:** Merge duplicate parties and cleanse single parties, page 2-1.
 - **Purge Requests:** Permanently purge parties, page 3-1.
 - **Party Maintenance:** Maintain party information such as certification and status, page 4-1.
- Import tab
 - **Batch Import:** Transfer data from import interface tables into the TCA Registry, page 6-2.

In addition, Oracle Customer Data Librarian contains all of the features in Oracle Customers Online, including purchasing information from D&B to enrich your customer data, mapping customer records to their source systems, and loading data

from source files into the import interface tables.

Within the Customers Online features, however, only with Oracle Customer Data Librarian can you, in the Recent Items bin, see and access the last few merge and purge requests that you viewed. See: Recent Items, *Oracle Customers Online User Guide*.

With the Oracle Customer Data Librarian responsibility, you have access to all Customers Online features that are available to the Oracle Customers Online User responsibility. The Oracle Customer Data Librarian Superuser responsibility likewise gets the same features as the Oracle Customers Online Superuser responsibility.

Related Topics

Introduction to Oracle Customers Online, *Oracle Customers Online User Guide*

Introduction to Oracle Customer Data Librarian, page 1-1

De-Duplication

This chapter covers the following topics:

- De-Duplication Overview
- System Duplicate Identification
- Merge Requests Overview
- Creating Merge Requests
- Reviewing Merge Requests
- Mapping Merge Requests

De-Duplication Overview

Use de-duplication to:

- Merge duplicate parties in the Oracle Trading Community Architecture (TCA) Registry.
- Cleanse a specific party so that it does not have any duplicate information.

The TCA Registry is the single source of party information for all Oracle E-Business Suite applications. These applications provide user interfaces, batch data entry functionality, and other features for you to enter party information. Multiple points of data entry can result in duplicate and inaccurate information.

Each application must quickly, accurately, and consistently retrieve information from the TCA Registry for transaction processing. Duplicate data in the Registry can reduce the efficiency and accuracy of party processing and reports.

De-duplication provides functionality for the entire process of resolving duplicate parties and information in the TCA Registry:

- **Identify duplicates:** Create merge requests, which contain information about the duplicate parties that you want to merge or the party that you want to cleanse.

- **Automatically merge duplicates:** Optionally run Automerge to automatically merge parties identified as definite duplicates. Automerge bypasses manually creating, mapping, and submitting merge requests.
- **Manage merge requests:** Review, assign, and reject specific requests.
- **Map merge requests:** Determine the results of the merge by specifying the information that remains after the merge. You map the duplicate information to merge either among parties or within the party that you are cleansing.
- **Submit merge requests:** Run the Party Merge process to perform the actual merge, either for duplicate parties or within a party to cleanse it.

Note: If you have source system information in the TCA Registry, de-duplication uses the Single Source of Truth record. See: *Single Source of Truth Overview, Oracle Trading Community Architecture Administration Guide.*

Related Topics

Introduction to Oracle Customer Data Librarian, page 1-1

Major Features of De-Duplication, page 2-2

Examples, page 2-3

Major Features of De-Duplication

System Duplicate Identification

The System Duplicate Identification (SDI) feature lets you create SDI batches that contain potential sets of duplicates. De-duplication runs a program to identify duplicates based on criteria that you specify. You can use any duplicate set in a batch as the basis for a new merge request.

Automerge

You can run Automerge as part of creating SDI batches to automatically merge definite duplicates. This process bypasses manually creating, mapping, and submitting merge requests for obvious duplicates. Parties in the SDI batch that are not merged are included in a new batch, for manual review at a later time.

Merge Request Creation

You can create two types of merge requests:

- **Multiple:** Contains a duplicate set of two or more parties to merge.

- **Single:** Contains a single party to cleanse.

De-duplication provides three methods for creating merge requests. Each Multiple type request must contain parties of the same type, such as Person or Organization.

Merge Request Management

Aside from reviewing merge requests, you can:

- Assign requests to specific users
- Unassign requests
- Reject requests

Merge Request Mapping and Submission

For each merge request, you map the duplicate information to determine the results of the merge. For both Single and Multiple type requests, you map address and relationship information. De-duplication can provide default suggestions for either mapping. Set the *HZ: Submit Suggested Person Merge Request* profile option to *Yes* to automatically submit the suggested person merge request after the related organization parties are merged.

For Multiple type requests, you also map party profile attributes, which describe the party. For example, for the D-U-N-S Number attribute, you specify which number from the duplicate set should remain after the merge.

After reviewing your mapping, you can submit the merge request for the Party Merge process.

Related Topics

De-Duplication Overview, page 2-1

Examples

These examples illustrate using de-duplication to merge multiple duplicate parties or cleanse a party.

Related Topics

De-Duplication Overview, page 2-1

Merging Multiple Parties

Create Merge Request

You create a merge request with a set of four duplicate parties to merge, each with its own party sites or addresses, relationships, and party profile attribute values. Your

merge request is automatically assigned the Multiple type.

This table shows the duplicates, addresses, and attribute values for Registry ID, CEO Name, and Number of Total Employees.

Duplicate	Registry ID	CEO Name	Number of Total Employees	Party Site
Party A	102	Joe Smith	100,000	Address 1 Address 2
Party B	101	Joseph Smith	200,000	Address 3 Address 4
Party C	101	Joseph Smith	100,000	Address 5 Address 6
Party D	102	Joey Smith	100,000	Address 7 Address 8 Address 9

Party D is defaulted as the master party that remains after the other three duplicates merge into it.

Map Party Profile Attributes

The default party profile attributes are determined by profile option settings. You can, however, designate a value from any duplicate to remain after the merge, as shown for example in this table.

Attribute	Party	Attribute Value
Registry ID	Party D	102
CEO Name	Party B	Joseph Smith
Number of Employees	Party D	100,000

As a result, Party D remains after the merge with these party profile values.

Map Addresses and Relationships

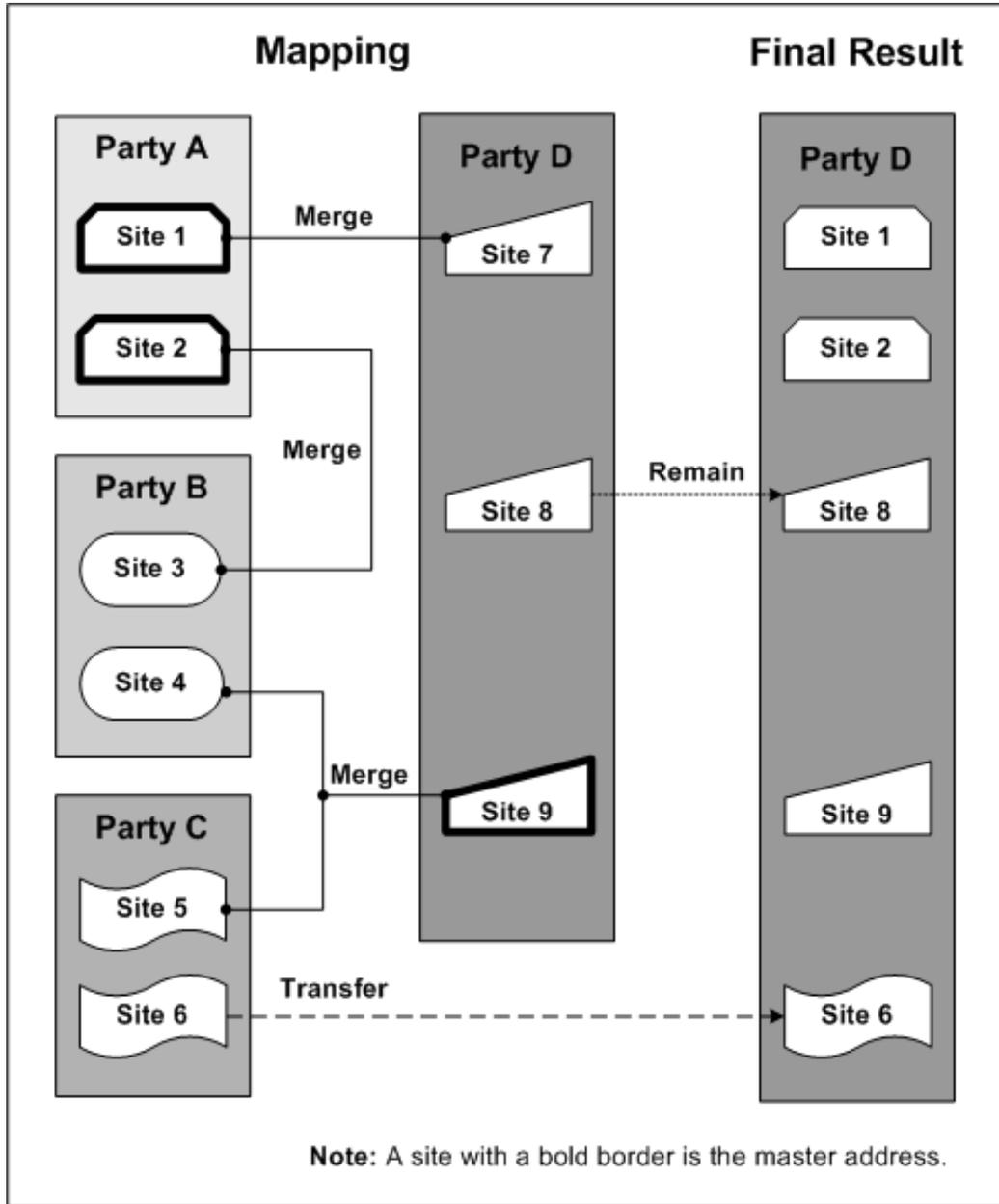
You decide to use the default mapping suggestions:

- Address 1 and 7 are duplicates, and Address 1 is the master address that remains after the merge.
- Address 2 and 3 are duplicates, with Address 2 as the master.
- Address 4, 5, and 9 are duplicates, with Address 9 as the master.
- Address 6 is not a duplicate and should transfer to Party D after the merge.
- Address 8 is not a duplicate and should remain in Party D.

As a result, Party D remains after the merge with these party sites:

- Address 1, which Address 7 merged into
- Address 2, which Address 3 merged into
- Address 6, which transferred to Party D
- Address 8, which remained in Party D
- Address 9, which Address 4 and 5 merged into

This diagram illustrates the address mapping and the result after the merge:



Note: Address 7 merged into Address 1, which remained after the merge even though Address 7 is the site from Party D. De-duplication lets you specify the master address no matter if it is from the master party or not.

For this merge request, you would also similarly map relationships among the four parties.

Cleansing a Party

Create Merge Request

You create a merge request with one party to cleanse address and relationship information for. Your merge request is automatically assigned the Single type.

This party has these employee relationships, in which the party is the employer of these employees:

- Jennifer Smith
- Joey Lee
- Jenny Smith
- Janie Smythe
- Joseph Lee

Map Addresses and Relationships

The suggested mapping defaults for the employee relationships include the duplicate sets shown in this table.

Duplicate Employees	Master Employee
Jennifer Smith	Jennifer Smith
Jenny Smith	
Joseph Lee	Joseph Lee
Joey Lee	

The master employee is randomly defaulted. You can select another employee as the master or override the default groupings themselves. In this case, you designate Jenny Smith as the master employee for the first duplicate set and determine that Joseph and Joey Lee are not duplicates.

As a result, these employees remain after the merge:

- Jenny Smith
- Janie Smythe
- Joseph Lee
- Joey Lee

For this merge request, you would also similarly map the party's addresses.

System Duplicate Identification

System Duplicate Identification (SDI) is a process that produces batches of system-identified duplicates to merge. Each duplicate set within a batch can have either multiple parties to merge together or just one party to cleanse. De-duplication runs the DQM Duplicate Identification program to generate the duplicate sets in each batch, based on your criteria.

As part of creating an SDI batch, you can run Automerge to automatically merge definite duplicates. Parties are included in Automerge processing if they reach an automatic merge threshold. Parties that are not automatically merged are included in a new SDI batch.

Note: You can run Automerge only as part of creating an SDI batch. You cannot first create a batch and then run Automerge on it.

You can use any of the duplicate sets in an SDI batch as the basis of a new merge request. See: *Merge Requests Overview*, page 2-13 and *Creating Merge Requests*, page 2-17.

From the System Duplicate Identification Batches page, you can:

- **Create New Batch:** See: *Creating System Duplicate Identification Batches*, page 2-10.
- **Phase:** Review the details of the DQM Duplicate Identification program, for example the error log.
- **Detail:** See: *Reviewing System Duplicate Identification Batches*, page 2-11. You can also create merge requests based on duplicate sets from the SDI batch you are reviewing. See: *System Duplicates*, page 2-19.
- **View Report:** See: *Viewing System Duplicate Identification Batch Reports*, page 2-12.
- **Administration:** Manage the list of parties marked as not duplicates of selected parties. See: *Administering Nonduplicate Mappings*, page 2-13.

The System Duplicate Identification Batches page shows SDI batches created by the user. To restrict the list, you can search for batches by:

- **Batch Name:** The name of the batch.
- **Batch ID:** The number that is automatically appended to the batch name when the batch is created.

- **Phase:** The status of the DQM Duplicate Identification program that generates the duplicate sets after the batch is submitted.
 - Running
 - Pending
 - Inactive
 - Completed

Note: Duplicate sets are sequentially generated and immediately available, even if the program is still identifying more duplicates.

- **Created By:** The user who created the SDI batch.

The search results provide additional information about the SDI batches:

- **Status:** Status of the phase of the DQM Duplicate Identification program, for example Normal or Error.
- **Source**
 - *Import:* Batch was created as a result of Registry de-duplication during an import process. If Automerge was part of the de-duplication, the batch contains only the parties that were automatically merged.
 - *Import AM:* Batch was created as a result of Registry de-duplication, with Automerge, for an import process. This batch contains only parties that were not automatically merged.
See: Registry De-Duplication, page 6-8.
 - *System:* User manually created the batch. If Automerge was part of the batch creation, the batch contains only the parties that were automatically merged.
 - *System AM:* Batch was created as a result of Automerge run as part of creating a batch. This batch includes only parties that were not automatically merged.
See: Automerge in System Duplicate Identification, page 2-10.
- **Automerge:** Batch contains duplicate sets that were automatically merged, when Automerge was run as part of:
 - Creating the SDI batch. See: Automerge in System Duplicate Identification, page 2-10.
 - Registry de-duplication for an import process. See: Registry De-Duplication,

Related Topics

De-Duplication Overview, page 2-1

Creating System Duplicate Identification Batches

You can create System Duplicate Identification batches that contain sets of system-identified duplicates. De-duplication generates SDI batches based on:

- The Data Quality Management match rule that you specify. See: Match Rules Overview, *Oracle Trading Community Architecture Administration Guide*.
- Your conditions for a subset of parties to use for identifying duplicates. See: Defining Subset for Identifying Duplicates, page 2-11.

When you define and submit a SDI batch, the DQM Duplicate Identification program sequentially generates duplicate sets for the batch, using your match rule and conditions. A unique batch number is automatically appended to the batch name when you submit the batch. The batch appears in the System Duplicate Identification Batches page as soon as you submit the batch, even if the program has not yet finished running.

Automerger in System Duplicate Identification

You can optionally run Automerger as part of creating the batch. Automerger lets you merge parties that are definite duplicates without going through the process of creating, mapping, and submitting merge requests. See: Automerger, *Oracle Trading Community Architecture Administration Guide*.

For the batch, you select a match rule that is enabled for Automerger, and then select Run Automerger. Automerger is not run if you do not select both. You should be familiar with how your selected match rule works, and especially aware of the automatic merge threshold.

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

After the duplicate sets are identified for the batch, Automerger automatically merges the sets in which all parties have match scores that exceed the automatic merge threshold defined in your selected match rule. Merge requests are automatically created with these duplicate sets. You can view and track these Automerger merge requests in the Merge Request Queue, as well as resubmit failed Automerger processes. See: Merge Requests Overview, page 2-13.

If any party in an Automerger merge request already exists in another merge request, the request would result in error. Even if one request fails, the other requests from the

same SDI batch would continue to process accordingly.

If the System Duplicate Identification batch includes parties that do not reach the automatic merge threshold, a new batch is created to include those duplicate sets.

Note: When you create a batch with Automerge selected, the batch name is automatically prefixed with *AM*. If a new batch is created for the duplicate sets that were not merged, that batch has the same batch name, only without the *AM*.

Defining Subset for Identifying Duplicates

Define conditions that a record must meet to be an input record used to identify duplicates within your entire system. For example, you can specify that the Registry ID must be less than 1001. All parties with such a Registry ID are compared to one another, as well as to all other parties in your system, to determine duplicates for the System Duplicate Identification batch.

If you select to match only within the subset, then the records that meet the criteria are compared only to one another, not to all records. From the above example, the SDI batch would contain only parties with a Registry ID less than 1001.

Scheduling Batch Creation

You can create the System Duplicate Identification batch as soon as possible or at a specific date and time. Optionally also schedule the repeat this batch creation at a regular interval. For example, you can specify to repeat every 20 days, from the first run (whether that is as soon as possible or at a specific date and time) until your specified end date.

Related Topics

Resubmitting Requests, page 2-16

System Duplicate Identification, page 2-8

Reviewing System Duplicate Identification Batches

You can review any System Duplicate Identification batch that was submitted, even if the DQM Duplicate Identification program is still running to generate all duplicate sets.

Subset for Identifying Duplicates specifies filtering criteria used to create the SDI batch, if any. See: Creating System Duplicate Identification Batches, page 2-10.

Optionally create a merge request using any of the duplicate sets in this batch.

Tip: Select multiple duplicate sets to create separate merge requests with each set, at the same time.

You can also update duplicate sets only, or create a merge request using the duplicate set you are updating. See: System Duplicates, page 2-19.

Related Topics

System Duplicate Identification, page 2-8

Viewing System Duplicate Identification Batch Reports

The report for any submitted or completed System Duplicate Identification (SDI) batch shows the number of parties with a specified number of duplicates. You determine the duplicate categories to report on, for example, parties with two other duplicates, five to seven, or more than ten. The report displays the number of parties in each category, as well as the ratio to the total number of parties in the batch, expressed as a percentage.

For example, you define a category for five duplicates. The report shows that there are 36 parties in the SDI batch with five duplicates, and 72 total parties in the batch, and that 50% of the parties in the batch have five duplicates.

In the graphical view of the report, the duplicate categories lie along the x-axis and the number of parties in each category along the y-axis. In this example, for the 5 category, the bar would go up to 36. The tabular view for this category is as follows in this table:

Duplicates Per Customer Record	Frequency	Percentage
5	36	50

Configuring the Report

When you configure the duplicate categories to report on, you must divide up the categories in a sequential and gapless manner. This table provides an example:

Starting Duplicate Count	Meaning	Description
0	0	No Duplicates
1	1	One Duplicate
2	2 - 5	Two to Five Duplicates
6	6 - 9	Six to Nine Duplicates
10	10+	More Than Ten Duplicates

You cannot, for example, start the duplicate count at five, then two, then ten. Each duplicate category ranges from its starting duplicate count to the next category's starting duplicate count. The last category in the sequence always means duplicates of more than its starting duplicate count, in this example, more than ten duplicates.

To get an accurate count of all the parties in the SDI batch, start the sequence at zero. If you start the sequence at 2, for example, the report does not include parties with no or one other duplicate.

Note: The meaning that you enter is displayed in the report to represent the duplicate category. The entered description is not displayed.

Related Topics

System Duplicate Identification, page 2-8

Administering Nonduplicate Mappings

Parties are marked as nonduplicates of other parties as part of creating merge requests from System Duplicate Identification batches, or just updating duplicate sets in SDI batches. Nonduplicate mappings ensure that the parties are not selected as duplicate candidates in the future. See: System Duplicates, page 2-19.

For the selected party, only nonduplicates with an end date of today or later are displayed. To administer mappings, you can change the end date:

- To make the mapped parties available to be selected as duplicates again.
- To update the duration of the nonduplicate mapping.
- So that the two parties to be always mapped as not duplicates of each other.

You can display certification levels and reasons through personalization. Certification assignments indicate the quality of records, and the meaning of each level is based on your organization's business needs. See: Assigning Certifications, page 4-1.

Related Topics

System Duplicate Identification, page 2-8

Merge Requests Overview

A merge request contains all the information for a specific merge process, including:

- The party or parties involved in the merge
- The intended results of the merge

For an overview of the entire merge process, see: De-Duplication Overview, page 2-1.

A merge request of type Multiple contains a set of duplicate parties to merge. Each Multiple type request has a designated master party that remains after the other duplicates merge into it. A request of type Single involves cleansing one party.

When you create or update a merge request, the Create Merge Batch process runs to create or re-create the request, including generating the suggested mapping defaults. For example, if you remove a duplicate from the request, the process runs to regenerate the merge request. Running the Create Merge Batch process is called preprocessing in de-duplication.

After you map the merge request to determine the results of the merge, you submit the request for the actual Party Merge process.

Caution: You cannot undo a merge. Use only match rules that provide exact matches.

Merge Request Queue

Start at the Merge Request Queue page to:

- **Create Request** or **Create Merge Request:** See: Creating Merge Requests, page 2-17
- **Merge Request Name:** See: Reviewing Merge Requests, page 2-20.
- **Assign:** Assign and unassign merge requests of any phase, no matter whom the request is currently assigned to or who created the request.

Tip: You can click Remove from Set to remove any merge request from the assignment. You are not deleting or rejecting the request.

- **Reprocess:** Reprocess selected merge requests to regenerate default master records, as well as default profile attributes and default relationship and address groupings for mapping. You might want to reprocess, for example, if you change profile option settings or match rules that affect merge requests.
- **Map:** Map and submit merge requests, or reject the request. See: Mapping Merge Requests, page 2-21.

If the HZ: Data Sharing and Security Rules for Data profile option is set to:

- *Apply Rules at Mapping and Do Not Show Access Column:* Then Data Sharing and Security (DSS) rules determine mapping access. You can map a merge request only if the DSS rules assigned to your user ID allow you to update all the parties in the request.

- *Apply Rules at Mapping and Show Access Column:* Then, in addition, the Access column is displayed to indicate your access status.

See: Data Sharing and Security Overview, *Oracle Trading Community Architecture Administration Guide*.

- **Status:** If the request has a status of Submitted for Merge, Completed, or Error, you can see details of the Party Merge process, for example the error log.
- **Resubmit Requests:** Rerun processes that originally resulted in error. See: Resubmitting Requests, page 2-16.

The Merge Request Queue page shows all merge requests. To restrict the list, you can search for requests by:

- **Merge ID:** The merge request ID.
- **Name:** The master party of Multiple type requests or the party to cleanse in Single type requests.

Note: Merge request names with the *SUGG:* prefix are for suggested merge requests that the system creates after merging parties. These requests contain parties related to the originally merged parties. If the *HZ: Submit Suggested Person Merge Request* profile option is set to *Yes*, then the suggested person merge request is automatically submitted after the related organization parties are merged. See: Relationships, page 2-27.

- **Source:** The method used to create the merge request.
 - *Import:* Manually from a System Duplicate Identification batch that import Registry de-duplication created. If Automerge was part of the de-duplication, then the merge request was automatically created to contain a duplicate set that was automatically merged.
 - *Import AM:* Manually from a SDI batch that resulted from import Registry de-duplication with Automerge. The batch contains the duplicate sets that were not automatically merged.
See: Registry De-Duplication, page 6-8.
 - *System AM:* Manually from a SDI batch that resulted from creating a batch with Automerge. The batch that contains only parties that were not automatically merged was used to create this merge request.
See: Automerge in System Duplicate Identification, page 2-10.
 - *System:* Manually from a SDI batch that was also manually created. If

Automerge was part of the batch creation, then the merge request was automatically created to contain a duplicate set that was automatically merged.

- *User*: Using Smart Search, Registry ID selection, or other manual user selection.
- **Phase**: The mapping phase of the request, which corresponds to the Status column in the table.
 - *AM Queue*: Request is in the queue to be automatically merged by the Automerge program.
 - *Completed*: Party Merge process successfully completed.
 - *Error*: Party Merge process resulted in error.
 - *Mapping*: Request has been modified since creation.
 - *Preprocess*: Create Merge Batch process is running to create or regenerate the request, which is not yet ready for mapping.
 - *Rejected*: Request has been rejected.
 - *New*: Create Merge Batch process has successfully completed, and the request has not been modified since but is ready for mapping.
 - *Submitted*: Request has been submitted for the Party Merge process.

Tip: Refresh the status to see the latest values.

- **Assignment**: The user assigned to the request, or *Unassigned*.

Resubmitting Requests

From the Resubmit Requests bin on the Merge Request Queue page, you can resubmit preprocessing, the Create Merge Batch process, or the Party Merge process for appropriate merge requests. If either process previously resulted in an error, you resubmit the process for that merge request after you fix the problem.

For merge requests that are automatically created and then merged, as part of System Duplicate Identification batch creation, you can also resubmit Automerge processes that resulted in error. For the Batch parameter, select the SDI batch ID that the merge request originates from. See: Automerge in System Duplicate Identification, page 2-10 and Automerge, *Oracle Trading Community Architecture Administration Guide*.

Creating Merge Requests

You can create merge requests:

- **Registry ID:** By selecting specific parties. See: Registry ID, page 2-18.
From a Registry ID list of values, you select at least one party to include in your new merge request.
- **Smart Search:** Using Smart Search to find potential duplicates. See: Smart Search, page 2-18.
Smart Search provides a list of parties based on your criteria. You select at least one party to include in a new merge request.
- **System Duplicates:** From duplicate sets in a System Duplicate Identification (SDI) batch. See: System Duplicates, page 2-19.
A SDI batch contains sets of duplicates that de-duplication identifies based on your criteria for the batch. You select duplicate sets from any batch to create one or more merge requests. See: System Duplicate Identification, page 2-8.

Note: To create a merge request of type Single, use any of the methods to create a request with only the party that you want to cleanse.

In your new merge request, you cannot include parties that already belong to either another merge request or a merge batch in Oracle Trading Community Architecture Party Merge. A message would inform you if you select such a party. See: Creating Merge Batches, *Oracle Trading Community Architecture User Guide*.

Before you submit the new request for creation with the System Duplicates or Registry ID method, you can still remove parties from Multiple type requests. You do not delete the party from the TCA Registry, and the party is available to be included in other SDI batches, duplicate sets, or merge requests.

After you submit a new merge request, the Create Merge Batch process runs to create the merge request. Depending on the request type, the name of your new merge request is:

- **Multiple:** The name of the master party.
- **Single:** The name of the one party in the request.

For merge requests of type Multiple, the HZ: Merge Master Party Defaulting profile option determines the master party, which remains after the merge. You can change the master party when you map the merge request. See: Request Summary, page 2-23.

Related Topics

Merge Requests Overview, page 2-13

Registry ID

In the Merge Request Queue page, select the Registry ID method for the Create Request field.

Tip: You can also click Registry ID in the Create Merge Request bin from the Merge Request Queue.

You can specify the exact party or parties to include in a new merge request by Registry ID. Click Remove from Set to remove any party from the duplicate set.

The certification levels indicate the quality of records, and the meaning of each level is based on your organization's business needs. See: Assigning Certifications, page 4-1.

Related Topics

Creating Merge Requests, page 2-17

Smart Search

In the Merge Request Queue page, select the Smart Search method for the Create Request field.

Tip: From the Merge Request Queue page, you can also click Smart Search in the Create Merge Request bin.

Smart Search is a powerful search engine which finds parties that not only exactly match but are similar to your criteria. The available search criteria depends on the Data Quality Management (DQM) match rule that is assigned to the HZ: Match Rule for Identifying Duplicates profile option. See: Setting Up De-Duplication, *Oracle Customer Data Librarian Implementation Guide*. Run the search with at least one criterion.

You browse the search results and create a merge request either with parties that are in fact duplicates or with a single party that you want to cleanse.

The certification levels indicate the quality of records, and the meaning of each level is based on your organization's business needs. The status is also set as part of party maintenance. See: Maintaining Parties, page 4-1.

Related Topics

Creating Merge Requests, page 2-17

System Duplicates

Use the Merge Request Queue or System Duplicate Identification Batches page to start the process of creating a merge request from a duplicate set in a System Duplicate Identification batch.

You can also use the party merge request Web service to create a party merge request for duplicate party IDs and/or a combination of the source system and the source system IDs. See: *Web Services Implementation Overview, Oracle Trading Community Architecture Administration Guide*.

- **Merge Request Queue:** Select the System Duplicates method for the Create Request field. Search for and select the SDI batch to use.
- **System Duplicate Identification Batches:** Review the batch that you want to use. See: *Reviewing System Duplicate Identification Batches, page 2-11*.

Tip: You can also click System Duplicates in the Create Merge Request bin, and select the batch to use.

Subset for Identifying Duplicates specifies filtering criteria used to create the SDI batch, if any. See: *Creating System Duplicate Identification Batches, page 2-10*.

Select at least one duplicate set from the batch.

Tip: Select multiple duplicate sets to create separate merge requests with each set, at the same time.

Alternatively, click Details to view and update a duplicate set, and optionally use that as the set to create a merge request. Duplicate sets already used to create merge requests are not available. You can update duplicate sets without creating merge requests with them.

Updating Duplicate Sets

View all parties in the duplicate set that are designated for merge. If the match rule used to create the SDI batch has an automatic merge threshold, parties with scores that exceed the threshold are marked as Automerge candidates.

Note: Automerge candidates would have been automatically merged as part of creating the SDI batch if the option was selected. See: *Automerge in System Duplicate Identification, page 2-10*.

Certification levels indicate the quality of records, and the meaning of each level is based on your organization's business needs. See: *Assigning Certifications, page 4-1*.

To update duplicate sets with multiple parties, you can:

- **Remove From Set:** Remove any party from the duplicate set so that it is not part of the merge request.

Important: Any party that you remove from a set cannot be selected for a merge request again using this duplicate set.

- **Edit Removed Parties:**

- Restore parties to include in the merge request.
- Mark any removed party as not a duplicate of the parties that remain in the created merge request. The nonduplicate mapping ensures that the parties are not selected as duplicate candidates in the future. You define a date range for this mapping to be active, and can leave the end date blank for the mapping to always be active.

After you create the merge request, you can still update the end date for nonduplicate mappings. See: *Administering Nonduplicate Mappings*, page 2-13

- **Match Details:** View details about how a specific duplicate was identified, based on the DQM match rule used to create the System Duplicate Identification batch. The party marked as the master is the input record that DQM used to identify the other duplicates in the set.

For each attribute that is a match between the master and the duplicate, you can see the attribute value from both parties, and the match score for that attribute. The total score is used to compare against the thresholds in the match rule used to create the SDI batch.

- *Match Threshold:* The duplicate is selected for the duplicate set because the total match score between that party and the master party meets or exceeds the match threshold.
- *Automerge Threshold:* The duplicate is an Automerge candidate if the total match score meets or exceeds the Automerge threshold.

Related Topics

Creating Merge Requests, page 2-17

System Duplicate Identification, page 2-8

Reviewing Merge Requests

The Request Review page provides a summary of the merge request, including the involved party or parties and any cumulative notes that were made during the request mapping process. The certification levels indicate the quality of records, and the

meaning of each level is based on your organization's business needs. See: Assigning Certifications, page 4-1.

Use the party merge Web service to retrieve details about a party merge. See: Web Services Implementation Overview, *Oracle Trading Community Architecture Administration Guide*.

The operating unit parameter is displayed when the Customer Merge process is submitted as a concurrent program. If there is more than one operating unit, then the first five operating units are displayed and, if there are more than five operating units, then "..." is appended after the fifth operating unit.

Note: The notes are available only if the IMC: Display Notes for Merge Request Mapping profile option is set to *Yes*.

Related Topics

Merge Requests Overview, page 2-13

Mapping Merge Requests

A new merge request contains information about the included parties to merge or the party to cleanse, but you can map the request to determine the results of the merge. For all aspects of the merge result, de-duplication provides defaults which you can review and modify as needed.

Set the profile option HZ: Enable DQM Merge Suggestion to 'No' to disable DQM suggestion. This will reduce time lag and improve performance during the during the Create Merge Batch process.

Note: You cannot update the mapping of requests that are already submitted for the Party Merge process.

As you go through the mapping process, you can:

- **Save your work at any time:** When you navigate out of a mapping step, your work for that step is automatically saved. For substeps with an Apply or Save Note button, you must click that button to save your work.
- **Cancel your work at any time:** When you click the Cancel button, you discard all mapping for the merge request, and mapping defaults are regenerated.
- **Record cumulative notes:** You record comments for any step of the mapping process. These notes are cumulative and displayed in each subsequent step.

Note: The notes are available only if the IMC: Display Notes for Merge Request Mapping profile option is set to *Yes*.

Addresses and Relationships

For Single type requests, you map sets of duplicate addresses and relationships for the party and determine the master address or relationship that remains after the merge for each set.

For Multiple type merge requests, you map sets of duplicate addresses and relationships among the parties and determine the master address or relationship that remain for each set. The master address or relationship does not need to come from the master party.

Party Profile Attributes

Party profile attributes, such as First and Last Names, SIC Code, and CEO Name, describe the parties in the TCA Registry. Each party can have attribute values for any of the attributes, for example a number for the D-U-N-S Number attribute.

For Multiple type requests, you map each attribute to determine which value remains after the merge. For example, if the request contains five duplicates, each with a D-U-N-S Number, you specify the number that remains after the merge. That number does not need to come from the master party. Party profile attribute mapping does not apply to Single type requests.

Related Topics

Merge Requests Overview, page 2-13

Examples, page 2-3

Mapping Processes

Addresses, relationships, and party profile attributes can be mapped in any sequence, at different times, and by different data librarians. For Multiple type requests, the request summary should be reviewed first to confirm the master party, which affects defaults for the other mapping steps.

If the HZ: Data Sharing and Security Rules for Data Librarians profile option is set to *Apply Rules at Merge Submission*, then you can submit the request for merge only if the Data Sharing and Security (DSS) rules assigned to your user ID allow you to update all the parties in the merge request. See: *Data Sharing and Security Overview, Oracle Trading Community Architecture Administration Guide*.

Tip: After you submit a merge request, you can access details of the Party Merge process in the Merge Request Queue page. See: Reviewing Merge Requests, page 2-20.

To map a merge request of type Single:

1. Review the request summary, page 2-23.
2. Map duplicate addresses within the party, page 2-25.
3. Map duplicate relationships within the party, page 2-27.
4. Review and submit the request for the Party Merge process.

To map a merge request of type Multiple:

1. Review the request summary, page 2-23.
2. Map party profile attributes, page 2-24.
3. Map duplicate addresses among the parties, page 2-25.
4. Map duplicate relationships among the parties, page 2-27.
5. Review and submit the request for the Party Merge process.

Request Summary

The Request Summary page provides an overview of the merge request that you are mapping, of type Multiple or Single.

You can reject merge requests from the Request Summary page, no matter whom the request is assigned to. You cannot reject a merge request with a Completed phase.

Caution: A rejected merge request is no longer available for mapping and cannot be reactivated. To view rejected requests, search for requests with the Rejected phase. See: Merge Request Queue, page 2-14.

For Multiple type merge requests, you also see the included duplicates and the master party that is currently selected for the request. You can select a different master party or remove duplicates from the request. If the merge request contains both active and inactive parties, you can select only an active party as the master. For more information about master parties and removing duplicates, see: Creating Merge Requests, page 2-17.

Important: If you change the master party or remove any party, you must click Apply and Reprocess, return to the Merge Request Queue page, and wait for mapping defaults to regenerate before continuing with the mapping process.

The certification levels indicate the quality of records, and the meaning of each level is based on your organization's business needs. The status is also set as part of party maintenance. See: Maintaining Parties, page 4-1.

You can personalize this page and display the number of source systems, which is hidden by default. The number indicates how many source systems the party is mapped to. See: Source Systems, *Oracle Customers Online User Guide*.

Optionally enter any notes, if available, for the request summary step and click Save Note.

Related Topics

Mapping Merge Requests, page 2-21

Profile Attributes

For merge requests of type Multiple, use the Profile Attributes page to determine the party profile attribute values that remain with the master party after the merge. Specify the category to display, and optionally specify the number of candidates to display per page. The default selected values depend on the HZ: Default Profile Attributes for Merge and HZ: Default Secondary Profile Attributes for Merge Mapping profile options, but you can choose values from another party, or candidate, in the duplicate set.

The type of attributes you map, Organization Profile attributes or Person Profile attributes, depends on the type of parties in the merge request. The attributes for each party type are also categorized, and you can specify the category to display in the Profile Attributes page.

Some attributes belong to attribute groups, and all attribute values in a group must come from the same party. Every group has a primary attribute, and the candidate that its value comes from also determines the values for the other attributes in the group.

For example, SIC Code is the primary attribute and SIC Code Type is the other attribute in the group. In the Profile Attributes page, only SIC Code is enabled for you to select an attribute value. If you specify that the value for SIC Code comes from Candidate 2, the value for SIC Code Type would also come from Candidate 2.

Note: Any attribute with disabled selection is a nonprimary attribute in a group, with the first enabled attribute above it as the primary attribute.

Optionally enter any notes, if available, for the profile attributes mapping step and click Save Note.

Related Topics

Mapping Merge Requests, page 2-21

Addresses

Use the Addresses page to map addresses either within a party for Single type merge requests or among the parties in Multiple type requests. You determine which addresses are duplicates by creating duplicate address sets and specify the master address that remains after the other addresses merge into it. When you submit the request for the Party Merge process, the duplicate address sets would be merged based on your mapping, with the resulting master addresses.

Every address has a grouping status:

- **Mandatory:** Addresses in a Mandatory duplicate set must merge together because they have the same location ID.
- **Optional:** Addresses in an Optional duplicate set can be removed from the group and included in another set.
- **Not Grouped:** Addresses are not currently mapped to any duplicate set. These addresses will exist after the merge as an address either of the one party for Single type merge requests or of the master party for Multiple type requests.

If the HZ: Show Address Mapping Suggestions profile option is set to *Yes*, all suggested address mapping is shown by default. If not, the Addresses page displays addresses without any groupings except for the Mandatory duplicate sets. You can use the search to narrow down the list of addresses and subsequently find more addresses to map, or select Apply Suggested Groupings for the Change Grouping option.

Note: If you already have duplicate sets of addresses and run a search for more addresses, any search results would be added without disrupting the existing groupings.

At any point of the address mapping process, you can:

- Apply the mapping suggestions and override whatever groupings you currently have, if any.
- Clear all groupings, including suggested defaults, except for Mandatory duplicate sets.

The Addresses table shows duplicate address sets in a hierarchical manner. For each set, the master address is the parent and the other duplicates are its children. Any address

that does not belong to a hierarchy is not included in any duplicate address set and is automatically transferred to the resulting party after the merge.

Important: If every address to be merged is also an account site address for the same respective party, then tax validation applies to the merge. See: Tax Validation for Merge, page 2-27.

The validation adapter and level are displayed if the address has been validated. See: Address Validation, *Oracle Trading Community Architecture User Guide*.

You can personalize this page and display the number of source systems, which is hidden by default. The number indicates how many source systems the address is mapped to. See: Source Systems, *Oracle Customers Online User Guide*.

To map addressees, you can:

- **Update Set:**

- Select another master address if the current master is not Mandatory.
- Remove Optional or Not Grouped addresses from the set.

If you remove all addresses other than the master, you ungroup the entire set and all addresses in the set would have the Not Grouped grouping.

- **Merge:** Select at least two addresses to create a duplicate address set to merge. If you select a master address from any duplicate address set, the other addresses in that set are also included.

Note: Addresses from a purchased source such as D&B can only be merged into addresses of the same source.

For Mandatory duplicate sets:

- You must select the master to merge the set with other addresses because the Mandatory addresses must merge together.
- You can select only one Mandatory master to include in the new duplicate set.
- You must keep the Mandatory master as the master in the new set.

Select the master address if applicable and optionally remove any Optional or Not Grouped address from the set. You do not delete the address from the TCA Registry, and the removed address is available to be included in other duplicate address sets.

Optionally enter any notes, if available, for the address mapping step and click Save Note.

Related Topics

Mapping Merge Requests, page 2-21

Tax Validation for Merge

For tax purposes, you can only merge addresses within the same tax jurisdiction:

- If the addresses are set up for tax validation in Geography Hierarchy then the address elements with a tax validation usage must match. See: *Managing Validations, Oracle Trading Community Architecture Administration Guide*.

For example, Address 1 is created in a country that is set up with City, County, and State selected for tax validation. Address 2 is created in the same country. To merge these two addresses, the city, county, and state for both addresses must be exactly the same, as validated against geographies set up in Geography Hierarchy.

- If the addresses are not set up for tax validation in Geography Hierarchy, then you can merge the addresses as long as the country is the same.
- If you have both types of addresses, with and without addresses set up for tax validation in Geography Hierarchy, then you cannot merge the addresses.

Relationships

Use the Relationships page to map relationships either within a party for Single type merge requests or among the parties in Multiple type requests. You determine which relationships are duplicates by creating duplicate relationship sets and specify the master relationship that remains after the other relationships merge into it. When you submit the request for the Party Merge process, the duplicate relationship sets would be merged based on your mapping, with the resulting master relationships.

If the HZ: Create Suggested Merges from Party Merge profile option is set to *Yes*, then the system automatically creates suggested merge requests with parties related to the parties that are merged. For example, Joe Smith and Joseph Smith are merged, along with these selected relationships:

- Joe Smith (ID: 123) as employee of Oracle (ID: 100)
- Joseph Smith (ID: 125) as employee of Oracle (ID: 101)

The system would then create a suggested merge request with Oracle (ID: 100) and Oracle (ID: 101).

For each relationship role, the Relationships table shows the number of original relationships in the merge request and the number of relationships that will exist after the actual merge. You can resolve duplicates within each relationship role.

If the HZ: Show Relationship Mapping Suggestions profile option is set to *Yes*, all suggested relationship mapping for the relationship role is shown by default in the

Resolve Duplicates page. If not, the page displays all relationships in the role without any groupings except for the Mandatory duplicate sets. You can use the search to narrow down the list of relationships and subsequently find more relationships to map.

At any point of the relationship mapping process, you can:

- Apply the mapping suggestions and override whatever groupings you currently have, if any.
- Clear all groupings, including suggested defaults, except for Mandatory duplicate sets.

Select the relationship role that you want to map and click Resolve Duplicates.

Resolving Duplicate Relationships

The table in the Resolve Duplicates page shows duplicate relationship sets in a hierarchical manner. For each set, the master relationship is the parent and the other duplicates are its children. Any relationship that does not belong to a hierarchy is not included in any duplicate relationship set.

You can personalize this page and display the number of source systems, which is hidden by default. The number indicates how many source systems the related party is mapped to. See: *Source Systems, Oracle Customers Online User Guide*.

If no suggested duplicate sets are defaulted, optionally search for relationships to limit the list. If you are resolving duplicate contacts, you can search to see any or all relationship roles in the Party Contacts relationship group. You can merge relationships with different roles within this relationship group. See: *Introduction to Contacts, Oracle Customers Online User Guide*.

Note: If you already have duplicate sets of relationships and run a search for more relationships, any search results would be added without disrupting the existing groupings.

Every relationship has a grouping status:

- **Mandatory:** Relationships in a Mandatory duplicate set must merge together because they involve the same parties.
- **Optional:** Relationships in an Optional duplicate set can be removed from the group and included in another set.
- **Not Grouped:** Relationships are not currently mapped to any duplicate set. These relationships will exist after the merge as a relationship either of the one party for Single type merge requests or of the master party for Multiple type requests.

To map relationships, you can:

- **Update Set:**

- Select another master relationship if the current master is not Mandatory.
- Remove Optional or Not Grouped relationships from the set.
If you remove all relationships other than the master, you ungroup the entire set and all relationships in the set would have the Not Grouped grouping.
- **Merge:** Select at least two relationships to create a duplicate relationship set to merge. If you select a master relationship from any duplicate relationship set, the other relationships in that set are also included.

Note: Relationships from a purchased source such as D&B can only be merged into relationships of the same source.

For Mandatory duplicate sets:

- You must select the master to merge the set with other relationships because the Mandatory relationships must merge together.
- You can select only one Mandatory master to include in the new duplicate set.
- You must keep the Mandatory master as the master in the new set.

Select the master relationship that remains after the merge, if applicable. If the duplicate set has both active and inactive relationships, you can select only an active relationship as the master.

Optionally remove any Optional or Not Grouped relationship from the set. You do not delete the relationship from the TCA Registry, and the removed relationship is available to be included in other duplicate relationship sets.

Return to the Relationships page. Optionally enter any notes, if available, for the relationship mapping step and click Save Note.

Related Topics

Mapping Merge Requests, page 2-21

Relationships Overview, *Oracle Trading Community Architecture User Guide*

Party Purge

This chapter covers the following topics:

- Party Purge Overview
- Purge Requests

Party Purge Overview

Party purge lets you permanently purge parties from the TCA Registry, for example duplicate or mistakenly entered parties. A party is available for purge only if it has no associated transactions, or if the party record has no references from other database tables. You cannot restore a party after you purge it.

The purge functionality includes:

- **Purge requests:** Purge batches of parties.
- **Purge history:** View parties that were successfully purged.

Related Topics

Introduction to Oracle Customer Data Librarian, page 1-1

Purge Requests

A purge request is a batch of parties that you submit to purge from the TCA Registry. The purge requests go through these stages:

1. You create the purge request, and the potential purge candidates are identified based on your criteria. See: [Creating Purge Requests](#), page 3-2.
2. You can manage the purge request by viewing its details and determining the parties that you want to leave marked for purge or to optionally remove from the

request. See: Viewing Purge Request Details, page 3-3.

You can also click Delete Request to delete the entire purge request if it has not yet been successfully purged.

3. Click Purge Parties submit the purge request for purge, and the parties that are marked for purge are purged from the Registry.
4. Access the purge history to view parties that have been purged from the TCA Registry. Click the purge request name to view the purge request details. See: Viewing Purge Request Details, page 3-3.

Information for a purge request includes:

- **Request ID for Identification:** The concurrent request ID for the TCA Identify Purge Candidates program, which identifies potential parties to include in the purge request. You can view the log of the concurrent request, which includes a list of the identified purge candidates.
- **Request ID for Purge:** The concurrent request ID for the TCA Purge Identified Parties program, which purges the parties in the purge request. You can view the log of the concurrent request, which includes a list of the purged parties.
- **Status:** The status of the identification or purge program, whichever is the last to run on the purge request. Possible statuses are: Identification in Progress, Identification Complete, Identification Error, Purge in Progress, Purge Complete, and Purge Error.

If a purge request has the Identification Complete status, you can specify which parties to leave marked for purge or to remove from the purge request.

- **Purge candidates:** The number of parties initially identified for the purge request.
- **Marked for purge:** The number of parties that you have not removed from the purge request. Only the parties marked for purge are actually purged.

Related Topics

Party Purge Overview, page 3-1

Creating Purge Requests

Create a purge request to identify a batch of parties to purge. You must enter a unique name for the purge request. To limit the parties that are eligible for the request, you can select parties by:

- **Registry ID:** Select specific parties to purge. A party cannot be purged if it has associated transactions. After you create the purge request, you can view the

request details to see which parties are ineligible for purge. See: Viewing Purge Request Details, page 3-3.

- **Party Attributes:** Specify criteria that parties must match to be included in the purge request. Only parties without associated transactions are selected.

The available party attributes to use as criteria include the classification assigned to the party. See: Classifications Overview, *Oracle Trading Community Architecture Administration Guide*

After you create a purge request, the TCA Identify Purge Candidates program runs to identify the purge candidates.

Related Topics

Purge Requests, page 3-1

Viewing Purge Request Details

View basic information about the purge request and the parties that are eligible or not eligible for purge. Subset for Identifying Purge Candidates specifies filtering criteria used to create the purge request, if any. See: Creating Purge Requests, page 3-2.

- **Eligible for Purge:** For purge requests with the Purge Complete status, meaning that the parties within the request are successfully purged, you can view details about the purge request as well as the parties that were purged.

For purge requests with the Identification Complete status, meaning that the purge candidates are successfully identified and not yet purged, you can still remove parties from the purge request. Only parties that are not removed are marked for purge. You can view the removed parties and restore any of them to the purge request so that they are marked for purge again. You cannot remove or restore parties after you click Purge Parties submit the purge request to purge the parties.

- **Not Eligible for Purge:** For purge requests created by selecting specify parties to include by Registry ID, view the parties that are not eligible for purge. Expand a party to see the applications that it has transactions in.

Related Topics

Purge Requests, page 3-1

Party Maintenance

This chapter covers the following topics:

- Maintaining Parties

Maintaining Parties

Party maintenance lets you:

- Assign a certification level and reason to the party. See: Assigning Certifications, page 4-1.
- Indicate if the party is internal to your organization.
- Activate or inactivate by changing the status of the party.

To maintain parties, you first search for the organization or person to work on.

Assigning Certifications

Use certification levels to classify parties by standards that your organization sets. Certification levels can be used, for example, in search results to determine which organization or person records are better qualified, given equal match scores.

If you assign a certifications level, you must also provide a certification reason. Each party can have only one certification level and reason.

Setting the certification level to blank is the same as unassigning, or removing, the certification. The blank setting indicates that the party requires review for certification. The seeded Not Met certification level, on the other hand, indicates that the party was reviewed but did not meet the requirements to receive any defined certification level. If you remove a certification level, make sure that the certification reason is also blank.

The seeded certifications levels are:

- Highest

- Minimum
- Not Met

The seeded reasons are:

- Manual Review
- Third Party Content

Your administrator can modify these values, or add new levels and reasons. See: *Setting Up Party Maintenance, Oracle Customer Data Librarian Implementation Guide.*

Activating and Inactivating a Party

You can activate or inactivate a party (organization or person) by changing the status. You can also search for active and inactive customers in the Party Maintenance page.

Related Topics

Introduction to Oracle Customer Data Librarian, page 1-1

Customer Merge

This chapter covers the following topics:

- Merging Customers

Merging Customers

Use the Customer Merge feature to consolidate any duplicate customers or transfer site use activity from a customer or site that is no longer active to a new customer or site.

After the merge completes, all activities previously associated with the old customer or site are associated with the new customer or site. Activities include invoices, debit memos, commitments, credits, receipts, adjustments, quotes, orders, and service contracts. You can track the progress of a merge request through its status. For a detailed conceptual explanation of merging customer sites or customers, refer to *Merging Customers, Oracle Trading Community Architecture User Guide*. Customer Merge in Oracle Customer Data Librarian has the same functionality as Customer Merge in Oracle Trading Community Architecture, plus the additional ability to:

- Assign a data steward to an account merge request.
- Reject account merge requests.

Data stewards can perform the following functions:

- Create account merge requests.
- Submit account merge requests.
- Reject account merge requests to withdraw the submission of the merge or if the approval to submit the merge is denied.
- Search for and view account merge requests.
- Assign a data steward to an account merge request.

To create merge requests:

1. Use the Customers Online Data Librarian or Customers Online Data Librarian Superuser responsibility to access the Oracle Customer Data Librarian Home page. Select the Data Quality tab, then the Account Merge Requests subtab.
2. In the Merge Request Queue page, click **Create Account Merge**.
3. In the Create Merge Request page, select the following:
 - **Customer Type:** the type of customer you are merging, either an organization or person.
 - **Operating Unit:** the operating unit in which the customer you want to merge has account sites.
 - **Delete After Merge:** select this option to delete the duplicate customer account after merging.
 - **Merge Reason:** De-duplication or merger.
 - **Priority:** assign a processing priority for the merge process.
 - **Context Value:** optionally, enter a descriptive flexfield value at the merge request header level.
4. In the Duplicate region and then again in the Master region, enter the following:
 - **Customer Name:** search for, then select a customer name from the list of values.
 - **Account Number:** search for, then select one of the customer's account numbers from the list of values.

Tip: Search for either the **Customer Name** or **Account Number**. Once you select one of these field's values, the other field's value defaults.
5. Click **Next** .

To map addresses between different accounts

Follow these steps if you selected different account numbers. Otherwise, skip ahead to "To map addresses within the same account".

In the Address Mapping page, all duplicate usage sites associated with the duplicate account number selected appear in the Duplicate table. You can choose to create these duplicate usage sites within the master account number or you can merge the duplicate

usage site data to an existing master usage site of the same usage type (for example, merge duplicate Ship To site data into a master Ship To site).

For more information, refer to *Merging Different Customers, Oracle Trading Community Architecture User Guide*.

6. In the Address Mapping page, evaluate which duplicate account number usage sites you want to create within the master account number. If you want to merge any duplicate account number usage site data into existing master usage sites, then deselect the **Create Same Site** check box for that usage site.

The corresponding master **Address** field clears.

7. In the master **Address** field, click the search icon, then search for and select an existing master address with the same usage type.
8. Optionally, in the **DFP** field, select a descriptive flexfield value for the address to merge.
9. Choose one of the following actions:
 - **Cancel**: Click **Cancel** to cancel the customer merge request.
 - **Save**: Click **Save** to save the customer merge request and remain in the Address Mapping page.
 - **Submit Merge**: Click **Submit Merge** to save and submit the customer merge request for immediate processing.
 - **Apply**: Click **Apply** to save the customer merge request and return to the Merge Request Queue page.

To map addresses within the same account

Follow these steps if you selected the same account numbers. For more information, refer to *Merging Sites for the Same Customer, Oracle Trading Community Architecture User Guide*.

10. In the Address Mapping page, duplicate **Address** field, click the Search icon. Search for and select the address you want to merge (the site you plan to close).
11. In the master **Address** field, click the Search icon. Search for and select the address to which to merge (the site remaining open).

Action: Add as many duplicate/master address pairs as you want to merge within this account number.

12. Optionally, in the **DFP** field, select a descriptive flexfield value for the address to merge.

13. Choose one of the following actions:
 - **Cancel:** Click **Cancel** to cancel the customer merge request.
 - **Save:** Click **Save** to save the customer merge request and remain in the Address Mapping page.
 - **Submit Merge:** Click **Submit Merge** to save and submit the customer merge request for immediate processing.
 - **Apply:** Click **Apply** to save the customer merge request and return to the Merge Request Queue page.

To reject merge requests:

1. Use the Customers Online Data Librarian or Customers Online Data Librarian Superuser responsibility to access the Oracle Customer Data Librarian Home page. Select the Data Quality tab, then the Account Merge Requests subtab.
2. In the Merge Request Queue page, click the Map icon for the merge request.
3. In the Merge Request Overview page, click the **Reject Request** button.
A warning message is displayed to confirm the reject action.

To map merge requests:

You can update the address mapping for any merge request with a status of Saved.

1. In the Merge Request Queue page, click the Map icon for the merge request.
2. In the Merge Request Overview page, click **Next**.
3. In the Address Mapping page, you can update the duplicate and master addresses, the DFF, or remove an address mapping.

For detailed address mapping information, refer to To map addresses with different accounts, page 5-2 or To map addresses within the same account, page 5-3.

To assign merge requests:

By default, the user creating the merge request is assigned as the data steward. However, the data steward can assign the merge request to another data steward or assign it to a supervisor data steward to ensure correctness of the merge request prior to submission. Optionally, use the HZ: Default Data Librarian profile option to specify a default data steward. Refer to Party Merge Deployment Category, *Oracle Trading Community Architecture Administration Guide*.

1. Use the Customers Online Data Librarian or Customers Online Data Librarian

Superuser responsibility to access the Oracle Customer Data Librarian Home page. Select the Data Quality tab, then the Account Merge Requests subtab.

2. In the Merge Requests Queue page, select the merge requests you want to assign to a data steward and click **Assign**.

Note: You can select only the merge requests for sites having operating units that are accessible to the current user. Merge requests that are not assigned to any user are not displayed.

3. In the Assign Merge Requests page, select the name of the assignee. Leave the **Assignee** field blank to merge requests without an assignment.
4. Optionally, click the Remove from Set icon for a merge request to remove the request from a merge batch.
5. Click **Apply**.

To search for and view merge requests:

1. Navigate to the Merge Request Queue page using a Customer Data Librarian responsibility to access the Oracle Customer Data Librarian Home page. Select the Data Quality tab, then the Account Merge Requests subtab.
2. In the Merge Request Search region, enter a value in one or more of the following search fields:
 - **Merge ID:** the merge ID number assigned to the duplicate/merge pair after the completed merge.
 - **Request ID:** the concurrent request ID for the merge batch.
 - **Status:** the merge request status. Select one of the following statuses:
 - Failed
 - In Progress
 - Pending
 - Saved
 - Completed
 - Rejected

- **Operating Unit:** the operating unit in which the customer has account sites.
- **Master Customer:** the customer who stores the merged data upon completion.
- **Master Account Number:** the account number of the master customer.
- **Duplicate Customer:** all transactional data is removed from this customer upon the merge completion.
- **Duplicate Account Number:** the account number of the duplicate customer.
- **Assignee:** the data steward who ensures correctness of the merge request prior to submission.
- **Priority:** the processing priority when creating merge batches.

3. Click Go.

A list of merge requests that meet your search criteria appears. You can perform the following actions on merge requests with a Saved status:

- Map addresses between different accounts, page 5-2.
- Map addresses between the same accounts, page 5-3.
- Reject merge requests, page 5-4.
- Assign merge requests, page 5-4.

For merge requests with any other status, you can only assign a different data steward to the merge requests.

Import

This chapter covers the following topics:

- Import Overview
- Import Batches Overview
- Generating Batches
- Defining Imports
- Viewing or Updating Import Batches
- Resolving Import Errors
- Purging Import Batches

Import Overview

Bulk import is the process of loading customer data in bulk from legacy, third party, or other external sources into the TCA Registry.

In Oracle Customer Data Librarian (CDL), you can use:

- **File Load:** Load files of high volume organization, person, or contact data into the TCA import interface tables. See: File Loads Overview, *Oracle Customers Online User Guide*.
- **Batch Import:** Transfer batches of data from the interface tables into the TCA Registry. See: Import Batches Overview, page 6-2.

With Batch Import, you can review the batch and control the import process. Alternatively, if the appropriate import profile options are set, the file load data can automatically transfer from the interface tables into the Registry, as soon as the file load completes successfully. See: Setting Up Import, *Oracle Customers Online Implementation Guide*.

The import is only for information on the party level. To import both party and account information, use Customer Interface. See: Customer Interface, *Oracle Trading Community*

Related Topics

Introduction to Oracle Customer Data Librarian, page 1-1

Import Batches Overview

After data from a source file is successfully loaded into the import interface tables, that set of data is automatically included in a new import batch. The import batch name is the same as the file load name, and the batch ID is automatically generated if the batch comes from File Load.

Aside from import batches that contain data loaded using the File Load feature, import batches with data from other methods, such as D&B Load and SQL/ETL Load, are also displayed. See: *Loading Data into the Interface Tables, Oracle Trading Community Architecture Administration Guide.*

Note: Data must be loaded into the interface tables in the context of a batch. If using File Load, a batch is automatically generated. For any other loading tool, create a new batch with a new unique batch ID, which is required for loading into the interface tables. See: *Generating Batches, page 6-5.*

An import batch contains information about transferring a set of records from the interface tables into the TCA Registry, including settings for optional data quality preimport processes that you can perform on the batch.

- **Batch de-duplication:** Identify and resolve duplicates within the batch that you are importing from the interface tables.
- **Address validation:** Validate addresses within the batch against authorized sources.
- **Registry de-duplication:** Identify and resolve duplicates between the interface tables and the Registry.

If automatic import after file load is implemented, then import batches are created with the import processes already running. If not, you must manually define the import and submit the batch for the import process. See: *Setting Up Import, Oracle Customers Online Implementation Guide.*

All import batches are considered active, with any import or batch status, until they are purged. See: *Purging Import Batches, page 6-15.*

Searching for Import Batches

You can search for active import batches, and purged batches in the batch import history, by:

- **Address Validation Status:** The status of the address validation process.
- **Batch De-Duplication Status:** The status of the batch de-duplication process.

Note: No status for address validation or batch de-duplication means that the import batch is either rejected or not yet defined, while the Declined status indicates that the preimport process is declined as part of the batch definition.

- **Batch ID:** The import batch ID.
- **Batch Name:** The user-defined import batch name, which is the same as the name of the file load that provided the same set of data into the interface tables.
- **Batch Status:** The status of the import batch itself, including:
 - **Blank:** The import batch was generated in this application and does not yet have data loaded for it in the interface tables.
 - *Active:* The import batch is new and not yet defined for import.
 - *Action Required:* Preimport processes have either the Declined or Completed status, and the import batch was defined with preview before the actual import. You can now update the batch and submit it for the import.
Or, the import status is Completed with Errors or Completed with Error Limit Reached. You must resolve errors and import corrected records.
 - *Pre-processing:* Reimport processes are running.
 - *Post-processing:* Post-import processes are running. See: Postimport Processes, *Oracle Trading Community Architecture User Guide*.
 - *Rejected:* The import batch was rejected and cannot be defined for import.
 - *Stage:* The stage of the import process, including the percentage complete within that stage.

The Pending, Processing, Error, and Completed statuses are the same as for import status.

- **Created By** (for active batches search only): The user who created the file load that

corresponds to the import batch.

- **Import Status:** The status of transferring the import batch from the interface tables into the TCA Registry, including:
 - **Blank:** Either the import batch is not yet defined, or it is was defined with preview before the actual import.
 - *Action Required:* Preimport processes have either the Declined or Completed status, and the import batch was defined with preview before the actual import. You can now update the batch and submit it for the import.
 - *Completed:* The data in the batch was successfully imported into the TCA Registry.
 - *Completed with Errors:* The import process has completed. There are errors, but successful records might already be imported.
 - *Completed with Error Limit Reached:* The import process has stopped after reaching a specified number of errors, as set by your administrator. Successful records might already be imported.

The Rejected status is the same as for batch status. The Pending, Processing, and Error statuses reflect the concurrent program status.

- **Purged By** (for purged batches search only): The user who purged the import batch.
- **Source System:** The legacy, third party, or other external system that the source file data comes from.

Managing Import Batches

In the Batch Import History page, you view the purged batches in the search results. See: Viewing Batch Import History, page 6-15.

In the Import Batches page, after you view the search results, you can:

- **Generate Batch:** Create batches before loading data into the interface tables. See: Generating Batches, page 6-5.
- **Reject:** Reject import batches so that they are not eligible for import into the TCA Registry. The data remains in the interface tables until you purge the import batch. You can reject any batch except those that are currently being imported, already completed the import process, or are already rejected.
- **Activate Batch:** Updates batch status to Active for batches generated in this application. See: Generating Batches, page 6-5.

- **Define Import:** Define imports to submit import batches for preimport and import processes, or only preimport processes. You can define import for any batch except those that are being or were already imported, or are rejected. See: Defining Imports, page 6-6.
- **Batch Name:** View import batch details for any batch except those with preimport or import process currently running. You can also resolve any import errors and resubmit the batch. See: Viewing or Updating Import Batches, page 6-10 and Resolving Import Errors, page 6-14.
- **Update:** If only preimport processes were run for the batch, then you can preview results and resubmit for the actual import process. See: Viewing or Updating Import Batches, page 6-10.
- **Purge:** Purge import batches, except those with preimport or import process currently running. See: Purging Import Batches, page 6-15.

Related Topics

Import Overview, page 6-1

Generating Batches

Create import batches before loading data into the import interface tables. After a batch is generated, you can use File Load or other loading tools to populate the interface tables. See: Import Overview, page 6-1 and Import Batches Overview, page 6-2.

A generated batch initially has no batch status. After data is loaded into the interface tables for this batch, you can activate the batch on the Import Batches page, and then proceed to define the import. See: Managing Import Batches, page 6-4.

This table describes some terms in the pages used for this procedure.

Selected Terminology

Term	Description
Original System	The source system that the data to be imported in this batch comes from.
Estimated Total Records in Batch	The total number of records you estimate to import using this batch.

Defining Imports

To submit import batches for the import process, you define the import settings for the batch:

1. **Batch De-Duplication:** Optionally choose to run batch de-duplication and, if so, specify how to identify and resolve duplicates within the import batch. See: *Batch De-Duplication*, page 6-7.
2. **Address Validation:** Optionally choose to run address validation on the import batch, and if so, specify the authorized sources to use for validation. See: *Address Validation*, page 6-8.
3. **Import to Registry:** Optionally choose to preview results before import, or to run Registry de-duplication. You also specify error handling settings. See: *Import to Registry*, page 6-8.

When you submit a batch for import, you run the Import Batch to TCA Registry program for that batch. The import process is the same, except that you do not need to run the Import Batch De-Duplication report. You can access batch de-duplication preview or results through viewing or updating the batch. See: *Import Process, Oracle Trading Community Architecture User Guide*.

After the import process successfully completes, postimport processes automatically run. See: *Postimport Processes, Oracle Trading Community Architecture User Guide*.

Prerequisites

You should be familiar with:

- How records from the interface tables are determined for either insertion as a new record or for updating an existing record in the TCA Registry. See: *Matching Records with Source System Management, Oracle Trading Community Architecture User Guide*.
- What types of validation the records from the interface tables must pass for successful import. See: *Import Validations, Oracle Trading Community Architecture User Guide*.

Related Topics

[Import Batches Overview](#), page 6-2

[Resolving Import Errors](#), page 6-14

Batch De-Duplication

Batch de-duplication identifies and resolves duplicates within the batch that you are importing from the interface tables. You cannot check for duplicates between batches in the interface tables.

If you select to run batch de-duplication, you must:

- Enter the match rule to use. Only match rules with Bulk Duplicate Identification purpose are used for batch de-duplication.

Important: Do not select a match rule with user-defined custom attributes.

- Specify how to resolve duplicate parties found with batch de-duplication. The specified action would be taken on the batch before the data is imported into the TCA Registry.
- Specify how to resolve duplicate addresses, contact points, and contacts of party records that are not duplicates of other parties in the import batch.

For example, Organization 1 and Organization 2 are found to be duplicates. You selected to keep the record with the earliest creation date, which is Organization 1. Organization 1 is now a unique record, but it has five duplicate addresses. Those addresses are resolved based on the selected action to take on duplicate addresses.

Details on Actions to Take on Duplicates

The possible actions to take on duplicate parties and child entities include keeping one record based on creation or update date. Entering the most recent update date in the interface tables, however, is not mandatory. If none of the records in a set of duplicates has a date, then the one record to be imported is randomly selected. If only some of the records have a date, then the record to be imported is selected only from records that have a date, based on the specified action.

The action you select for duplicate parties affects address validation. If you select to update the batch and preview preimport process results, then address validation checks all addresses in the import batch, regardless of the selected action for duplicates. When you preview the results, you can still change the action to take.

If you choose to import directly, without a preview, then address validation checks only addresses that are imported, not those that are removed based on the selected action. See: Address Validation, page 6-8 and Import to Registry, page 6-8.

Related Topics

Defining Imports, page 6-6

Address Validation

If you choose to validate the addresses in the import batch before importing them into the TCA Registry, then you must select the address validation adapters to use. The address validation process is the same as that for the Import Batch to TCA Registry program, except that you can specify different adapters to use for different countries. The default adapter defined for each country is initially displayed. See: Import Address Validation, *Oracle Trading Community Architecture User Guide*.

If there are addresses with countries that are either not in the FND Territories lookup or are incorrectly formatted, then a row for Others appears at the bottom of the table. The default adapter for those addresses is from the HZ: Default Location Service Adapter profile option.

The addresses available for validation depend on the selected action to take on duplicate parties within the batch. See: Details on Actions to Take on Duplicates, page 6-7.

Related Topics

Defining Imports, page 6-6

Import to Registry

Import Options

You can preview import statistics and preimport processes results before the actual import into the TCA Registry. After the preimport processes finish, you update the batch to preview results and submit the batch for import. See: Viewing or Updating Import Batches, page 6-10.

If you selected to run batch de-duplication and address validation, whether you select to update and preview the batch or not can affect which addresses get validated. See: Details on Actions to Take on Duplicates, page 6-7.

Registry De-Duplication

Registry de-duplication identifies duplicates between the import batch and the TCA Registry. If you select to run Registry de-duplication, you must enter the match rule to use. Only match rules with Bulk Duplicate Identification purpose are used for Registry de-duplication. You can select the same match rule as for batch de-duplication.

Important: Do not select a match rule with user-defined custom attributes.

If the specified match rule is designated for Automerger, and you select to run Automerger, then potential duplicates that reach or exceed the match rule's:

- Match threshold, but not the automatic merge threshold, are by default included in System Duplicate Identification (SDI) batches for merge consideration. See: System Duplicate Identification, page 2-8.
- Automatic merge threshold are automatically merged after the import. The master record is the TCA Registry record with the highest match percentage to the incoming record.

If the match rule is not enabled for Automerge or you select not to run Automerge, then all potential duplicates that reach or exceed the match threshold are by default included in SDI batches.

All records that do not reach the match threshold are considered not duplicates and inserted as new parties. All potential duplicates are also inserted into the TCA Registry as new parties, but then accordingly included in SDI batches or automatically merged.

Tip: If you select to update and preview the import batch before the actual import, you can change the default actions to take. For example, you can select to automatically merge potential duplicates that, by default, are designated for manual merge in SDI batches. See: Viewing or Updating Import Batches, page 6-10.

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

Generate Fuzzy Key

Specify whether or not to generate fuzzy keys as part of the postimport processes.

Important: Skipping fuzzy key generation helps optimize performance, but select *No* only if you do not use Oracle E-Business Suite applications that use fuzzy keys.

See: Postimport Processes, *Oracle Trading Community Architecture User Guide*.

Error Handling

Optionally specify a limit on the number or percentage of errors allowed before canceling the import process. For example, if you enter 50 as the error limit number, then the process stops as soon as error 51 occurs. If you enter 50 as the error limit percentage, then the process stops as soon as 51% of records in the import batch result in error.

If you select to validate flexfields, then flexfield validation applies for inserting and updating records for these tables in the TCA Registry:

- HZ_CONTACT_POINTS
- HZ_LOCATIONS

- HZ_PARTIES
- HZ_RELATIONSHIPS

Related Topics

Defining Imports, page 6-6

Viewing or Updating Import Batches

The same type of import batch information is available whether you view or update import batches. You can update only batches that has only run the preimport processes and has an import status of Action Required.

- **Update:** Preview preimport processes results, after they complete. You can also:
 - Modify settings for preimport processes, for example the actions to take on duplicates.
 - Submit the batch for actual import, either immediately after your modifications, or at a later time. If you had changed preimport settings, those processes would run, and the actual import would automatically start afterwards. You cannot run only the preimport processes again for this batch.

Important: If you modify preimport settings without clicking **Apply**, and submit to complete the import, the import still runs with your modified settings.

- **View:** Review import results after the import process completes.

If you are viewing batches with the Completed with Errors import status, you can also view and resolve errors, if any. See: Resolving Import Errors, page 6-14.

You can view batches that are rejected or not yet defined, but those batches have no preimport and import statistics.

The import batch details provide:

- General information about the batch itself.
- Import statistics, page 6-11.
- Preimport process statistics, page 6-12.

Aside from general statistics, you can access details on the record level for batch and Registry de-duplication results, as well as for import errors. These record level details include:

- **Source System ID:** The source ID of the record.
- **Party Source System ID:** The source ID for the party record that the address, contact, or contact point record belongs to. See: *Source Systems Overview, Oracle Trading Community Architecture Administration Guide*.

Related Topics

Import Batches Overview, page 6-2

Import Statistics

Before Import

The preimport statistics include the number of records for each supported entity. The total number of records for import is the total number in the batch minus the records that were removed and not to be imported, as a result of actions taken on duplicates from the batch de-duplication process. See: *Batch De-Duplication, page 6-7*.

After Import

The postimport statistics include the number of records that are:

- **Insert:** Imported as new records.
- **Update:** Imported to update existing records.
- **Merge Request:** Included in a System Duplicate Identification (SDI) batch for merge consideration.
- **Automatic Merge:** Automatically merged. The merge occurs after all potential duplicates are inserted, so the total number of records imported includes these records.

Note: The statistics for Insert and Update do not include parties that are also included in a SDI batch or automatically merged.

You can compare, for the entire import batch before and after import, the number of records removed or imported.

Related Topics

Viewing and Updating Import Batch Details, page 6-10

Import Details

The import details include statistics and settings for the preimport processes, either before or after the actual import process has run. If you are updating the import batch and have run only the preimport processes, you can submit the batch for the actual import process, and rerun the preimport processes if you modified any of the settings.

Batch De-Duplication Details

View the number of duplicate records and duplicate sets that batch de-duplication has identified. If a selected action is to keep one record, based on creation or update date, then only one record from each duplicate set is imported.

You can also view the output from the Import Batch De-Duplication report, which displays all the records that are identified as duplicates, sorted by duplicate sets for parties, addresses, contacts, and contact points.

Each record has a status of either *I* for insert, or *D* for duplicate. If the action is Remove All Duplicates, all the records in a duplicate set would have the *D* status. Likewise, for the Keep All Duplicates action, all records have the *I* status. For any other action, all records in a duplicate set have the *D* status except the one record to be imported, with the *I* status.

If you are updating the import batch and previewing import details after running only preimport processes, you can still modify the actions to take on duplicates. If you change the action from Remove All Duplicates to any other action, then when you submit the batch and rerun batch de-duplication, those records originally marked for removal are:

- Sent through Registry de-duplication, if that process is selected.
- Checked for other validations and marked for either insert or update.

See:

- Matching Records with Source System Management, *Oracle Trading Community Architecture User Guide*
- Import Validations, *Oracle Trading Community Architecture User Guide*
- Batch De-Duplication, page 6-7

Address Validation Details

The address validation statistics include the number of address records that:

- Passed or failed validation.
- Were sent to be validated by the specified adapter. Not all records in the batch are

always validated. See: Details on Actions to Take on Duplicates, page 6-7.

See: Address Validation, page 6-8.

Registry De-Duplication

View the number of records from the import batch that Registry de-duplication has categorized, as well as the default action to take on each record type. This table describes the record types and the default actions to take on each type.

Record Type	Record Type Description	Entities	Default Action	Action Description
New and Unique	Does not match any record in the TCA Registry.	All	Insert	Insert the interface table record as a new record in the TCA Registry
Existing	Exactly matches a TCA Registry record.	All	Update	Update the existing TCA Registry record with the interface table record
Possible Duplicates	Is a potential duplicate of at least one Registry record. The record's match score exceeds the match threshold of the match rule used for the de-duplication, but not the automatic merge threshold.	Parties, party sites, contacts, and contact points	Manual Merge	Insert the record and then include it and its duplicates in a System Duplicate Identification batch for manual merge consideration

Record Type	Record Type Description	Entities	Default Action	Action Description
Duplicates	<p>Is a definite duplicate of at least one Registry record. The record's match score exceeds the automatic merge threshold of the match rule.</p> <p>Note: This record type is only available if the match rule is enabled for Automerge.</p>	Parties	<ul style="list-style-type: none"> • Auto Merge: If Run Automerge is selected as part of Registry de-duplication. • Manual Merge: If Run Automerge is not selected. 	Auto Merge: Insert the record and then automatically merge it with its duplicates

Note: An interface table record with the Existing type has the same source system and source ID as the corresponding TCA Registry record. The two records also match, as determined by the selected match rule. A record that is a duplicate or potential duplicate also matches TCA Registry records, but does not have the same source system and source ID.

If you are updating the import batch and previewing import details after running only preimport processes, you can still modify the actions to take. Not all actions are available for every record type. Aside from the actions described in the table above, the Remove action is also available for all record types, for removing the record from the batch and not importing it at all.

See: Registry De-Duplication, page 6-8.

Related Topics

Viewing Import Batch Details, page 6-10

Resolving Import Errors

1. View the errors of the import batch from the batch details. See: Viewing and Updating Import Batch Details, page 6-10. Only records with errors are displayed.
2. Correct the data directly in the interface tables. Records with errors are marked

with E in the INTERFACE_STATUS column of the interface table and associated with detail records in the import errors table, HZ_IMP_ERRORS.

3. Change the INTERFACE_STATUS column value to C for each corrected record.
4. Return to the import batch details to import the corrected records. See: Viewing and Updating Import Batch Details, page 6-10.

Related Topics

Import Batches Overview, page 6-2

Purging Import Batches

Purge import batches to permanently remove all records in the batch from the import interface tables, as well as internal tables such as staging and error tables. You can purge any batch, imported or not, except those that have preimport processes or the import process running.

You usually purge batches:

- After a satisfactory number of records are successfully imported into the TCA Registry from that batch.
- If the batch is rejected and you do not plan to import that set of data using another import batch.

Purging the interface tables improves import performance. To archive imported data, you should copy the data to a set of custom tables.

Viewing Batch Import History

Purged batches are no longer active, and you can view them only on the Batch Import History page. To search for purged batches, see: Searching for Import Batches, page 6-3.

You can also view details of purged batches that were not rejected. See: Viewing and Updating Import Batch Details, page 6-10.

Related Topics

Import Batches Overview, page 6-2

Standard Navigation Paths

This appendix covers the following topics:

- Standard Navigation Paths

Standard Navigation Paths

Although your system administrator may have customized your navigator, this set of tables displays typical navigation paths, listed by feature/function. Access all of these pages using the Customers Online Data Librarian Superuser responsibility. You can also use the Customers Online Data Librarian responsibility for all but the Administration functions.

The navigation paths use the following nomenclature:

- [T] = tab
- [ST] = subtab
- [B] = button
- [L] = link
- [I] = icon

Defining Customers, Organizations, Calendars, and Employees

Page Name	Navigation Path
Oracle Data Librarian Home	Dashboard
Organizations Simple Search	Dashboard [T] Customers [ST] Organizations

Page Name	Navigation Path
Organizations Advanced Search	Dashboard [T] Customers [ST] Organizations [B] Advanced Search
D& B Search and Results	Dashboard [T] Customers [ST] Organizations [B] Search D&B
Create Organization	Dashboard [T] Customers [ST] Organizations [B] Create
Persons Simple Search	Dashboard [T] Customers [ST] Persons
Persons Advanced Search	Dashboard [T] Customers [ST] Persons [B] Advanced Search
Create Person	Dashboard [T] Customers [ST] Persons [B] Create
Hierarchies Search	Dashboard [T] Customers [ST] Hierarchies
Create Hierarchy	Dashboard [T] Customers [ST] Hierarchies [B] Create
Calendar Daily View	Dashboard [T] Other [ST] Calendar [L] Daily
Create Appointment	Dashboard [T] Other [ST] Calendar [L] Daily [B] Create Dashboard [T] Other [ST] Calendar [L] Availability [B] Create Appointment Dashboard [T] Other [ST] Calendar [L] Appointments
Calendar Weekly View	Dashboard [T] Other [ST] Calendar [L] Weekly
Calendar Monthly View	Dashboard [T] Other [ST] Calendar [L] Monthly
Calendar Yearly View	Dashboard [T] Other [ST] Calendar [L] Yearly
Calendar Combination View	Dashboard [T] Other [ST] Calendar [L] Combination
Availability	Dashboard [T] Other [ST] Calendar [L] Availability
Lookup	Dashboard [T] Other [ST] Calendar [L] Availability [B] Add Resource
Public Calendar	Dashboard [T] Other [ST] Calendar [L] Public Calendar

Page Name	Navigation Path
Notes	Dashboard [T] Other [ST] Notes
Create Note	Dashboard [T] Other [ST] Notes [B] Create Note
Tasks	Dashboard [T] Other [ST] Tasks
Resources	Dashboard [T] Other [ST] Employees [L] Employees
Groups	Dashboard [T] Other [ST] Employees [L] Groups
Roles	Dashboard [T] Other [ST] Employees [L] Roles

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Merge Request Queue	Dashboard [T] Data Quality [ST] Party Merge Requests
System Duplicate Identification Batches	Dashboard [T] Data Quality [ST] System Duplicate Identification
System Duplicate Identification: Create Batch	Dashboard [T] Data Quality [ST] System Duplicate Identification [B] Create New Batch
Organization Party Maintenance	Dashboard [T] Data Quality [ST] Party Maintenance [L] Organization
Person Party Maintenance	Dashboard [T] Data Quality [ST] Party Maintenance [L] Person

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Purged Parties	Dashboard [T] Data Quality [ST] Purge Requests [L] Purge History

Create Purge Request	Dashboard [T] Data Quality [ST] Purge Requests [B] Create Purge Request
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