Oracle® Fusion Applications Enterprise Information Management Guide

11g Release 5 (11.1.5)

Part Number E22682-06

August 2012
Contents

1 Acquire Trading Community Information: Import Trading Community Information

   Import Trading Community Information .......................................................... 1-1
   Enter Import Process Information ................................................................. 1-1
   FAQs for Enter Import Process Information .................................................. 1-6
   FAQs for View Error Reports and Output Files ............................................. 1-7
   FAQs for Purge Batch ...................................................................................... 1-7
   Conduct What-If Analysis and Submit ......................................................... 1-7
   FAQs for View Batch Detail and Statistics ...................................................... 1-9

2 Manage Trading Community Data Quality

   Overview of Data Quality Management ......................................................... 2-1
   Cleanse Trading Community Information .................................................... 2-2
   FAQs for Cleanse Trading Community Information ...................................... 2-5
   Identify Duplicate Trading Community Information ..................................... 2-6
   Resolve Duplicate Trading Community Information ..................................... 2-10

3 Analyze Trading Community Information: Analyze Data Quality

   Analyze Data Quality ..................................................................................... 3-1
   FAQs for Analyze Data Quality .................................................................... 3-5

4 Manage Trading Community Information: Manage Party Information

   Manage Party Information ............................................................................. 4-1

5 Manage Trading Community Information: Manage Hierarchy Information

   Manage Hierarchy Information ...................................................................... 5-1
   FAQs for Manage Hierarchy Information ...................................................... 5-3

6 Manage Enterprise Resource Information

   Manage Resource Information .................................................................... 6-1
   FAQs for Manage Resource Information ...................................................... 6-4
   Manage Resource Organization Information ................................................. 6-5
   FAQs for Manage Resource Organization Information ............................... 6-6
   Manage Resource Team Information ............................................................. 6-7
   FAQs for Manage Resource Team Information ............................................ 6-8
Preface

This Preface introduces the guides, online help, and other information sources available to help you more effectively use Oracle Fusion Applications.

Oracle Fusion Applications Help

You can access Oracle Fusion Applications Help for the current page, section, activity, or task by clicking the help icon. The following figure depicts the help icon.

You can add custom help files to replace or supplement the provided content. Each release update includes new help content to ensure you have access to the latest information. Patching does not affect your custom help content.

Oracle Fusion Applications Guides

Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning. You can access the guides from the Guides menu in the global area at the top of Oracle Fusion Applications Help pages.

Note
The Guides menu also provides access to the business process models on which Oracle Fusion Applications is based.

Guides are designed for specific audiences:

- **User Guides** address the tasks in one or more business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organized by the business process activities and tasks.

- **Implementation Guides** address the tasks required to set up an offering, or selected features of an offering. They are intended for implementors. They are organized to follow the task list sequence of the offerings, as displayed within the Setup and Maintenance work area provided by Oracle Fusion Functional Setup Manager.

- **Concept Guides** explain the key concepts and decisions for a specific area of functionality. They are intended for decision makers, such as chief financial officers, financial analysts, and implementation consultants. They are organized by the logical flow of features and functions.
• **Security Reference Manuals** describe the predefined data that is included in the security reference implementation for one offering. They are intended for implementors, security administrators, and auditors. They are organized by role.

These guides cover specific business processes and offerings. Common areas are addressed in the guides listed in the following table.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Intended Audience</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common User Guide</td>
<td>All users</td>
<td>Explains tasks performed by most users.</td>
</tr>
<tr>
<td>Common Implementation Guide</td>
<td>Implementors</td>
<td>Explains tasks within the Define Common Applications Configuration task list, which is included in all offerings.</td>
</tr>
<tr>
<td>Information Technology Management, Implement Applications Guide</td>
<td>Implementors</td>
<td>Explains how to use Oracle Fusion Functional Setup Manager to plan, manage, and track your implementation projects, migrate setup data, and validate implementations.</td>
</tr>
<tr>
<td>Technical Guides</td>
<td>System administrators, application developers, and technical members of implementation teams</td>
<td>Explain how to install, patch, administer, and customize Oracle Fusion Applications.</td>
</tr>
</tbody>
</table>

For guides that are not available from the Guides menu, go to Oracle Technology Network at http://www.oracle.com/technetwork/indexes/documentation.

**Other Information Sources**

**My Oracle Support**

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Use the My Oracle Support Knowledge Browser to find documents for a product area. You can search for release-specific information, such as patches, alerts, white papers, and troubleshooting tips. Other services include health checks, guided lifecycle advice, and direct contact with industry experts through the My Oracle Support Community.

**Oracle Enterprise Repository for Oracle Fusion Applications**

Oracle Enterprise Repository for Oracle Fusion Applications provides visibility into service-oriented architecture assets to help you manage the lifecycle of your software from planning through implementation, testing, production,
and changes. In Oracle Fusion Applications, you can use the Oracle Enterprise Repository for Oracle Fusion Applications at http://fusionappsoer.oracle.com for:

- Technical information about integrating with other applications, including services, operations, composites, events, and integration tables. The classification scheme shows the scenarios in which you use the assets, and includes diagrams, schematics, and links to other technical documentation.
- Publishing other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

**Documentation Accessibility**

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/us/corporate/accessibility/index.html.

**Comments and Suggestions**

Your comments are important to us. We encourage you to send us feedback about Oracle Fusion Applications Help and guides. Please send your suggestions to oracle_fusion_applications_help_ww_grp@oracle.com. You can use the **Send Feedback to Oracle** link in the footer of Oracle Fusion Applications Help.
Acquire Trading Community Information: Import Trading Community Information

Import Trading Community Information

Trading Community Model Data Import Objects: Explained

Import objects are business entities that can be imported into the trading community model registry, for example, competitors, partners or resource teams. When you create a data import batch you should choose which business entity, or object, you are importing from the batch into the trading community model registry. For example, if you are responsible for resource management, you might want to import objects such as employee resource and resource team.

The import process flow will change according to which object you have selected. There are two import process flows for the following sets of objects:

2. Employee resource, resource team, partner, and partner contact.

Customer, Reference, Competitor, and Custom Party

When you select these objects you will receive the option to check for duplicates within the import batch before the import, and the option to check for duplicates between the import batch and the trading community model registry before import. You will also be able to choose to preview data before it is imported, specify if addresses will be cleansed before import, and set the how many errors you will allow before the import is terminated.

Employee Resource, Resource Team, Partner, and Partner Contact

If you choose to import these objects you will not be able to deduplicate the batch or registry data. However, you will be able to choose to preview data before it is imported, specify if addresses will be cleansed before import, and set the how many errors you will allow before the import is terminated.

Enter Import Process Information

Using Data Quality Services During Data Import: Explained

Data Quality Services help you ensure the quality of data being imported into the Trading Community Model registry. You can select how to use the services before importing data into the registry.
The data quality services are:

- **Batch Deduplication**: Batch deduplication allows you to define deduplication within the data being loaded.
- **Registry Deduplication**: Registry deduplication allows you to define deduplication of the data being loaded against the records that already exist in the Trading Community Model registry.
- **Import to Registry options**: Import to Registry options allow you to define the import process mode, data cleansing, and geography validation.

You can configure a batch import or file import process to invoke these services before importing data into the database.

### Defining Data Quality Services for File-Based Import

The file-based data import process allows you to define process criteria, file mapping, and import schedule for importing external files containing business objects into staging tables. You cannot define Data Quality Services for a file-based import activity during the file-based import process. However, an import activity can be paused and sent for administrator review after preprocessing and before importing the data. The administrator such as a data steward can then review the import process and configure data quality services.

Import activities are paused and sent for administrator review if the **HZ_IMP_PAUSE_FILE_IMPORT** profile option is set to Yes in the Manage Import Profile Options page. If the profile option is set to Yes, all submitted import activities are sent for administrator review and appear in the Data Import Batches Overview page. The administrator can then review and edit import activity details and options. Based on the review, the administrator can decide to approve and schedule the import batch or reject the import batch.

### Defining Data Quality Services for Batch Import

You can configure data quality services for batch import in the Define Import pages. For both the deduplication methods, you can select a match configuration to identify duplicates and also specify the action to perform on the duplicate records. In the Define Import: Import to Registry page, you can specify whether to run the import process in preview mode, whether to cleanse data before import, and whether to perform geography validation of data before import.

You can also configure geography validation for batch import at the site level using the **HZ_IMP_DEFAULT_GEO_VALID_ADDRESS** profile option in the Manage Import Profile Options page. The addresses are validated if the profile option is set to Yes in the Manage Import Profile Options page. The addresses are validated against the master reference geography data, according to the geography-based address validation settings for each country. The addresses with validation errors are not imported.

### Defining the Import Process for Customers and Consumers: Points to Consider

You can use the import process to import a batch from the interface tables into the Trading Community Model registry. Before the data is imported into the
You need to decide if you want to use the data quality services and if so, how you want to configure the data quality services. The data quality services are:

- Batch deduplication
- Registry deduplication
- Import to registry options

**Batch Deduplication**

Within the batch deduplication page you can decide if you want to identify and resolve duplicates within the batch that you are importing from the interface tables. If you want to check for duplicates you need to choose what match configuration rule you want to use to identify duplicates for each entity. Then you need to specify what action will be taken on the persons, organizations, and address duplicates found within the batch. Your specified actions will be performed on the batch before the data is imported into the registry.

**Registry Deduplication**

Similar to batch deduplication, registry deduplication identifies duplicates between the data in the batch and the data in the registry before the data is imported into the registry. If you want to check for duplicates you need to choose what match configuration rule you want to use to identify duplicates for each entity. Then you need to specify what action will be taken on the persons, organizations, and address duplicates found in the registry deduplication check. Your specified actions will be performed when you import the batch into the registry.

**Import to Registry Options**

When defining an import process you can decide whether to run the import process in preview mode, or you can choose to load the data directly into the registry without previewing the data. You can also choose to cleanse addresses prior to import, validate addresses in an import batch against geography data, and define an error limit for the batch.

**Import Process Mode**

You can choose to run the import batch in preview mode, or you can skip the preview and load the data directly into the registry.

If you select to run the batch in preview mode you will be able to review information about the level of duplicates or incorrect addresses in the batch data before the data is actually imported. You will also be able to preview how many records will be created and how many records will be updated for each entity. You can then continue to import the batch, or you can amend the match configuration rules and actions to be taken on the identified duplicates and then rerun the batch to review the data again.

If you do not want to review the batch data before it is imported into the registry, then you can choose to skip the preview and allow the data to be loaded into the registry as soon as preprocessing is complete. You may prefer not to preview the batch data if the data source is frequently used.
Note
The Define Import: Import to Registry page is the only place that you can specify if you want to run the batch in preview mode. Once the option to skip the preview mode is selected, and you submit the batch for processing, you will not be able to review the batch data before it is imported.

Cleanse Addresses
You can choose to validate the addresses in the interface tables before importing them into the registry. The addresses are validated using an integrated third party service that verifies addresses and corrects them if they are incorrect.

Geography Validation
You can choose to validate the addresses in an import batch against geography data before importing them into registry. The addresses are validated against the master reference geography data, according to the geography-based address validation settings for each country. The addresses with validation errors are not imported. However, Geography Name Referencing is run on all imported addresses regardless of this profile option setting.

Error Handling Limit
You can define how many process errors can be generated by the import batch process before the process terminates automatically. Error reports are generated by the application for you to review.

Defining the Import Process for Customers and Consumers: Worked Example

This example demonstrates how to create an import batch, and how to define the import process data quality services you want to use on the data prior to completing the import.

Note
Once an import is completed, the data is loaded into the Trading Community Model registry.

Create an import batch containing customer and consumer objects, load the import data into the interface tables, and configure the data import process so that you can view the batch in preview mode to check that all duplicate data are removed.

Creating an import batch

1. On the Data Import Batches Overview page, click on the Create Data Import Batch task located in the task pane.
2. On the Create Data Import Batch page, complete the fields as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch Name</td>
<td>Customer Import Batch</td>
</tr>
<tr>
<td>Source System</td>
<td>Comma separated values</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Object</td>
<td>Customer and Consumer</td>
</tr>
<tr>
<td>Estimated Number of Records</td>
<td>300</td>
</tr>
<tr>
<td>Batch Description</td>
<td>Import of customer data</td>
</tr>
</tbody>
</table>

3. Click **Save and Close**

4. After creating the import batch, load your data into the interface tables using a standard ETL tool.

**Defining the Data Import Process: Batch Deduplication**

You want to check the batch for address, organization, and person duplicates; you also want to remove all of these duplicates from the batch.

1. On the Data Import Batches Overview page, highlight the Batch Name, but do not click on the Batch ID URL.
2. Click **Actions** and then click **Import**.
3. On the Define Import: Batch Deduplication page, select the **Check for duplicates within the batch before import**.
4. Complete the fields in the **Select match configuration to determine duplicates within the import batch** section, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addresses</td>
<td>Batch Location Basic Duplicate Identification</td>
</tr>
<tr>
<td>Organizations</td>
<td>Batch Organization Basic Duplicate Identification</td>
</tr>
<tr>
<td>Persons</td>
<td>Batch Person Basic Duplicate Identification</td>
</tr>
</tbody>
</table>

5. Complete the fields in the **Override Default Actions** section, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Action for Persons and Organizations</td>
<td>Remove all duplicates</td>
</tr>
<tr>
<td>Select Action for Addresses</td>
<td>Remove all duplicates</td>
</tr>
</tbody>
</table>

6. Click **Next**.

**Defining the Data Import Process: Registry Deduplication**

You want to check for address, organization, and person duplicates between the import batch and the Trading Community Model registry; you also do not want to import duplicate records.

1. On the Define Import: Registry Deduplication page, select the **Check for duplicates between the import batch and the registry before import**.
2. Complete the fields in the Select match configuration to determine duplicates within the import batch section, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addresses</td>
<td>Batch Location Basic Duplicate Identification</td>
</tr>
<tr>
<td>Organizations</td>
<td>Batch Organization Basic Duplicate Identification</td>
</tr>
<tr>
<td>Persons</td>
<td>Batch Person Basic Duplicate Identification</td>
</tr>
</tbody>
</table>

3. Complete the fields in the Override Default Actions section, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Action for Persons and Organizations</td>
<td>Do not import duplicate records</td>
</tr>
<tr>
<td>Select Action for Addresses</td>
<td>Do not import duplicate records</td>
</tr>
</tbody>
</table>

4. Click Next.

**Defining the Data Import Process: Import to Registry**

You want to configure the data import process so that you can view the batch in preview mode, enabling you to review the data after preprocessing. You want to cleanse addresses before they are imported, and specify an error limit for the batch. You also want to validate all addresses in the import batch against geography data. This validates all incoming addresses as per the geography structure and validation level setup in Manage Geographies task. The addresses that are reported as Error during validation are not imported.

1. On the Define Import: Import to Registry page, select Run the batch in preview mode.
2. Select Cleanse addresses before import.
3. Select Validate address against geography.
4. In the Error Limit field, enter 200.
5. Click Submit.

**FAQs for Enter Import Process Information**

**Can I redefine the data import process for an already imported batch and reimport it?**

Yes. If the data is still available in the interface tables and the batch status is Preimport Completed, Completed with Errors, Error, or Terminated when Error Limit Reached, then you can redefine the data import process and reimport the batch. However, once a batch has been successfully imported then
you will not able to reimport the batch, even if the data is present in the interface tables.

**Can I try and import a batch again?**

Yes. You can reimport a batch to correct validation errors if the import process status is either *Preimport Completed*, *Completed With Errors*, *Error*, or *Terminated When Error Limit Reached*.

**FAQs for View Error Reports and Output Files**

**How can I view the errors that occurred during preimport processing?**

You can view any errors that occurred after submitting the batch for import by selecting the batch in the data import batches Overview page, and then click *Report*.

**Why did I receive a message that the data enrichment process was declined?**

The Oracle Fusion Trading Community Data Quality service may be unavailable, or you may not have the necessary licenses for the Data Quality service.

**FAQs for Purge Batch**

**What happens if I purge a data import batch?**

You permanently remove all records in the batch from the import interface tables. You should purge batches after the batch has been imported successfully and you are sure that the data in the interface tables is no longer required.

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

**Why can't I purge a data import batch?**

Data import batches cannot be purged when they have a status of *Processing*. Purging a batch purges the batch data in the interface tables and so cannot be carried out while the batch is importing the data from the interface tables into the registry.

**Conduct What-If Analysis and Submit**

**Performing What-If Analysis on Data Import Batches: Worked Example**

This example demonstrates how to perform What-If analysis on a data import batch that has been processed and has completed with a status of pre-import
completed. The match configuration is redefined and the import process is resubmitted. The batch deduplication actions are then amended, and the batch import is completed.

The following table summarizes key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you want to redefine batch deduplication match</td>
<td>Yes, a different match configuration is selected for the organizations entity.</td>
</tr>
<tr>
<td>configuration?</td>
<td></td>
</tr>
<tr>
<td>Do you want to redefine registry deduplication match</td>
<td>Yes, a different match configuration is selected for the persons entity.</td>
</tr>
<tr>
<td>match configuration?</td>
<td></td>
</tr>
</tbody>
</table>
| What actions do you want to take on Persons, Organizations, and Addresses duplicates? | • Within registry deduplication, choose Do not import duplicate records for Persons and Organizations.  
                                              | • Within registry deduplication, choose Import duplicate records for Addresses. |

**Prerequisites**

1. The data import batch has been created.
2. The data is uploaded into the interface tables.
3. The batch is imported and has completed with a status of pre-import completed.

**Viewing the What-If Analysis**

1. On the Data Import Batches Overview page, click on the batch ID URL.
2. On the Edit Data Import Batch page, review the summary and import process performance information. Click Import Details to open the What-If analysis page.
3. On the Import Process Details page, click the Batch Deduplication tab. Check that you are satisfied with the batch deduplication results.
4. On the Import Process Details page, click the Registry Deduplication tab. Check that you are satisfied with the registry deduplication results.
5. On the Import Process Details page, click the Address Cleansing tab. Check that you are satisfied with the address cleansing results.

**Redefining the Match Configuration and Resubmitting the Import Process**

The results of the batch and registry deduplication are not as expected and so the match configurations need to be redefined.

2. On the Data Import Batches Overview page, click on the batch name. Click Actions and then click Import.
3. On the Define Import: Batch Deduplication page, choose a different match configuration for the organizations entity. Click Next.
4. On the Define Import: Registry Deduplication page, choose a different match configuration for the persons entity. Click Next.
5. On the Define Import: Import Registry page, click **Submit**

**Changing the Action for Duplicates within the What-If Analysis**

You want to view the What-If analysis for the new match configurations that you selected for the batch.

1. On the Data Import Batches Overview page, click on the batch ID URL.
2. On the Edit Data Import Batch page, review the summary and import process performance information. Click **Import Details** to open the What-If analysis page.
3. The new match configurations have produced satisfactory results, but you would like to change the actions that will be carried out on the duplicates. On the Import Process Details page, click the **Registry Deduplication** tab.
4. For the Persons and Organizations duplicates, choose **Do not import duplicate records** from the choice list.
5. For the possible duplicates for Addresses, choose **Import duplicate records** from the choice list.
6. Click **Complete Import**.

**FAQs for View Batch Detail and Statistics**

**Why can't I view the import process details?**

The import process details are only available when you have selected to run the batch in preview mode, and you have submitted the batch for import.
Manage Trading Community Data Quality

Overview of Data Quality Management

Data Quality Management Components: How They Fit Together

Data quality configurations, data quality management during import process, duplicate identification, duplicate resolution, and data cleansing processes constitute the data quality management business flow that is used to manage the quality of the incoming and existing trading community registry data.

Data Quality Configurations

Data quality configurations include the configurations required to enable data quality management processes such as data quality matching and cleansing operations. These operations include real-time and batch matching and cleansing of existing data in the registry as well as in-batch matching and cleansing of data being imported into the registry.

The data quality services invoke appropriate services of the embedded data quality engine based on the data quality configurations.

Data Quality Management During Import Process

Lets you:

- Define deduplication within the data being loaded. You can select a match configuration to identify duplicates and also specify the action to perform on the duplicate records.
- Define deduplication of the data being loaded against the records that already exist in the trading community architecture registry. You can select a match configuration to identify duplicates and also specify the action to perform on the duplicate records.

Duplicate Identification

Lets you identify potential duplicates during data entry, data integration, or among records already in the application.

Duplicate Resolution

Lets you resolve duplicates either by directly merging them or by creating duplicate resolution request such as merge or link that can be verified, approved or rejected, and processed at a later date.
Data Cleansing

The need to cleanse registry data arises owing to data decay over time and the need to resolve inherited issues from consolidated data in the registry. For example, postal codes and city boundaries change over time and require regular address cleansing to ensure that the addresses in the registry are correct, validated, and standardized at all times. Batch cleansing lets you cleanse data that already exists in the registry and ensures data accuracy over time, avoiding data decay.

Besides, incoming data may originate from multiple sources with each source system following different data storage formats and norms. Real-time data cleansing ensures that the incoming data from source systems follows the same storage convention as the target system to achieve consistency in representation of information such as addresses.

Party Information Management

Party information management is done using the Party Center functionality. This functionality allows for a comprehensive management of party information such as profile, usage assignments, linked parties, contacts, accounts, tasks, interactions, and notes. A party is a physical entity, such as a person or organization, that the deploying company has an interest in tracking.

Cleanse Trading Community Information

Scheduling a Data Cleansing Process: Points to Consider

You can schedule a data cleansing process whenever you want. However, since such a process can be time consuming, ideally you would like to schedule it at a time when sufficient system resources are available. Before scheduling a data cleansing process, you should consider one or all of the following points.

- The duration required to complete the process
- Amount of free system resources
- Process dependencies

The Duration Required to Complete the Process

The duration required to complete the process is based on the record volume, cleansing complexity, and hardware characteristics. So for each batch scheduled, calculate the possible duration taking into account these three factors and available benchmark.

Amount of Free System Resources

Scan through the batch and environment statistics to make more realistic estimates of the system performance based on recent data. Also scan through the various objects lists to find out a suitable time when enough system resources
would be free to devote to the process. You can gather this from the individual high-level object list which captures the recent batch history.

**Process Dependencies**

Take process dependencies into account, for example, consider whether another process is waiting for the results of the batch cleansing process.

**Creating Address Cleansing Batches: Points to Consider**

You have the following options while creating an address cleansing batch:

- Create the address cleansing batch for a single run
- Create the address cleansing batch to be run periodically
- Create the address cleansing batch from a copy of an existing address cleansing batch

Consider the following points to determine which batch creation option best suites your address cleansing needs.

**Address Cleansing Batch for a Single Run**

Create an address cleansing batch for a single run only if scheduling it to be run periodically is not required or practical or will simply waste valuable computing power.

**Address Cleansing Batch to be Run Periodically**

Create an address cleansing batch to be run periodically to remove the need for creating a new batch definition every time addresses in the registry require validation and standardization. You can define the batch selection criteria and address cleansing mode once and schedule the batch to run at a specific interval, such as daily, every night at 9 PM, or weekly, every Sunday at 10 PM. This functionality allows you to automate the execution of the registry address cleansing, a tasks that is mostly ongoing and repetitive.

**Using the Copy of an Existing Address Cleansing Batch**

Use the copy of an existing address cleansing batch to quickly create another address cleansing batch. Although the new batch inherits details such as batch selection criteria and address cleansing mode, you can edit them and also schedule the new batch to run just once or periodically.

**Accept Data Cleansing Process Results**

**Accepting Data Cleansing Results: Critical Choices**

You can accept or reject the results of a batch data cleansing process run in simulated mode either in its entirety or selectively as follows:

- Accept or reject the data cleansing process results for an entire batch
• Accept or reject the data cleansing process results selectively by country
• Accept or reject data cleansing process results selectively by address record

Note

These choices are not available if you submit a batch for cleansing in the automated cleansing mode because in this mode the cleansed data is automatically saved to the database.

Accept or Reject the Data Cleansing Process Results for an Entire Batch

Accept the entire data cleansing process results for a batch only if you are confident that the data cleansing has happened accurately.

If you feel that the results are not reliable and accepting the cleansed data might have any unwanted impact on the quality of the data, reject the results.

Accept Or Reject the Data Cleansing Process Results Selectively by Country

Depending on the quality of the data and coverage or maturity of the postal directory for individual country or region, the results may vary from country to country. From among the following approaches, select the one that best suits your requirements:

• If you feel that the percentage of errors is high and that results for all countries are not acceptable, accept data only for countries with acceptable cleansing results.

• If you feel that the percentage of errors is very high for a country, reject the entire data for that country.

Accept or Reject Data Cleansing Process Results Selectively by Address Record

Accept or reject cleansing results for each individual address based on the cleansing status and business rules and policies.

Enter Data Cleansing Batch Information and Submit

Specifying Selection Criteria for a Data Cleansing Batch: Worked Example

Batch cleansing lets you validate and cleanse address data that already exist in the registry. The need to cleanse registry data arises owing to data decay over time and the need to resolve historic entering of errors in the database. For example, postal codes and city boundaries change over time and require regular address cleansing to ensure that the addresses in the registry are correct, validated, and standardized at all times. Besides, historic incoming address data may have originated from multiple sources with each source system following different data storage formats and norms and the addresses might not have been cleansed during the import or consolidation process. Batch cleansing of data ensures data accuracy over time, reducing data decay.
Use the Selection Criteria table on the Create Data Cleansing Batch page to specify selection criteria to create data cleansing batches of the records. The selection criteria are treated as a query.

**Populate the Selection Criteria Table**

Populate the selection criteria columns: **Object**, **Attribute**, **Operator**, and **Value**. Each row of the selection criteria table creates a selection criterion. Multiple selection criteria are joined by an AND condition.

1. Navigate to the Create Data Cleansing Batch page.
2. Enter the following sample information in the Selection Criteria table.

<table>
<thead>
<tr>
<th>Object</th>
<th>Attribute</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Address1</td>
<td>Contains</td>
<td>500 Oracle</td>
</tr>
<tr>
<td>Location</td>
<td>Country</td>
<td>Equal to</td>
<td>US</td>
</tr>
</tbody>
</table>

3. Click Submit.

**FAQs for Cleanse Trading Community Information**

**What's a Data Cleansing Batch?**

A batch of records built based on a set of selection criteria to cleanse data that already exists in the registry. The need to cleanse the registry data arises owing to data decay over time and the need to resolve inherited issues from consolidated data in the registry. For example, postal codes and city boundaries change over time and require regular address cleansing to ensure that the addresses in the registry are correct, validated, and standardized at all times. Besides, historic incoming address data may have originated from multiple sources with each source system following different data storage formats and norms and the addresses might not have been cleansed during the import or consolidation process.

**Can I edit and resubmit a data cleansing batch?**

No. But you can resubmit the data as part of another new batch. You can also edit fields, such as description, in a previously submitted batch.

**What's the difference between Automated Cleansing and Simulated Cleansing?**

Automated Cleansing mode does not require any user action. The data in a batch submitted in this mode is cleansed and automatically saved to the database.

When you submit a data cleansing batch in the Simulated Cleansing mode, you get a chance to view the output of the batch cleansing process before saving the cleansed data. Additionally, you have the option of accepting or rejecting the cleansed data in its entirety, or by country, or by individual address.
Why did the batch cleansing process skip some records?

A record is skipped when the batch cleansing process considers it already cleansed and validated. For example, an address that already follows the formats, norms, and standards of the related postal directory.

Identify Duplicate Trading Community Information

Managing Duplicate Sets: Explained

Managing duplicate sets involves reviewing the details of a completed duplicate identification batch and submitting duplicate resolution requests based on the duplicate sets identified.

The activity has the following aspects:

- Deciding whether to resolve duplicates within each identified duplicate set through a merge or link request
- Determining which records to remove from the duplicate resolution request
- Marking records as nonduplicate
- Changing the master record
- Submitting the duplicate sets for resolution

Deciding on the Duplicate Resolution Request Type

Select the duplicate resolution request type as merge to combine duplicate records, link to join duplicate records, or generic to select the duplicate resolution request type later.

Determining Which Records to Remove

Remove those records from the set that you do not want to include in the duplicate resolution request.

You can view the records removed from the set in the removed records table. You can also restore these records back to the original duplicate set.

Marking Records as Nonduplicate

Mark a pair of records as nonduplicate to prevent the pair from being identified as potential matches. To remove the pair from nonduplicate list, end date the nonduplicate record.

Changing the Master Record

The application randomly selects a record in a duplicate set as the master record to be preserved after merge. However, the data steward can select a different record as the master record.
Submitting the Duplicate Sets for Resolution

Submit the duplicate sets as merge or link requests for resolution.

Creating Duplicate Identification Batches: Points to Consider

You have the following options while creating a duplicate identification batch:

- Create the duplicate identification batch for a single run
- Create the duplicate identification batch to be run periodically
- Create the duplicate identification batch from a copy of an existing duplicate identification batch

Consider the following points to determine which batch creation option best suites your business needs.

Duplicate Identification Batch for a Single Run

Create a duplicate identification batch for a single run only if the run is for a one-off transaction or scheduling it to be run periodically is not required or practical or will simply waste valuable computing power.

Duplicate Identification Batch to be Run Periodically

Create the duplicate identification batch to be run periodically to remove the need for creating a new batch definition every time duplicates need to be identified in the registry. You can define the batch selection criteria and duplicate identification rules once and schedule the batch to run at a specific interval, such as daily, every night at 9 PM, or weekly, every Sunday at 10 PM. This functionality allows you to automate the execution of the registry duplicate identification, a task that is mostly ongoing and repetitive.

Using the Copy of an Existing Duplicate Identification Batch

Use the copy of an existing duplicate identification batch to quickly create another duplicate identification batch. Although the copied batch inherits most of the original batch details, such as batch selection criteria and duplicate identification rules, you can edit them and also schedule the new batch to run just once or periodically.

Enter Duplicate Identification Batch

Defining Subset Rules: Worked Example

This example demonstrates how to define subset rules, also known as batch criteria rules, to create duplicate identification batches.

Suppose there are duplicate records in your Oracle Fusion Trading Community Hub registry. You can go about identifying potential duplicate records either manually or by using the duplicate identification batch functionality of the
Oracle Fusion Trading Community Hub. You can create a duplicate identification batch by defining subset rules also known as batch criteria rules.

Use the Subset Rules for Identifying Duplicates table on the Create Duplicate Identification Batch page to specify criteria for retrieving a subset of records in the batch. The data quality engine identifies duplicate records from this subset of records. The rules for identifying duplicates are joined together by an AND condition.

Adding New Subset Rules

1. Navigate to the Create Duplicate Identification Batch page as follows:
   Customer Data Management Dashboard - Duplicate Identification Overview - Create Duplicate Identification Batch

2. Use the Create menu option or button to add a couple of new subset rules.

Populating Subset Rules and Submitting the Batch

1. Enter the following information in the Subset Rules for Identifying Duplicates table.

<table>
<thead>
<tr>
<th>Object</th>
<th>Attribute</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person</td>
<td>Name</td>
<td>Contains</td>
<td>John</td>
</tr>
<tr>
<td>Address</td>
<td>Address Line 1</td>
<td>Contains</td>
<td>Redwood</td>
</tr>
</tbody>
</table>

2. Click Submit.

View Nonduplicate Mapping

Nonduplicate Records: Explained

Mark a pair of records as nonduplicate to prevent the pair from being identified as potential matches.

Nonduplicate End Date

Used to revert nonduplicate records identified by data steward, so that going forward the records could be considered as potential duplicates again.

Manage Nonduplicate Records

Managing nonduplicate records involves modifying the period for which a record should be considered as a nonduplicate with the master record. You can achieve this by changing the end date.

Revert Nonduplicate

Remove a pair of records from the nonduplicate list by end dating the nonduplicate status.
FAQs for Assign Duplicate Identification Batch

Why am I unable to assign or reject duplicate identification batches?

Only a Data Steward Manager can assign new duplicate identification batches. You can initiate the assignment of duplicate identification batches to an assignee from the duplicate identification work area, named Overview, or the customer data management dashboard, or from the Manage Duplicate Identification Batches page, and complete it on the Assign Duplicate Identification Batch page. A Data Steward Manager can reject any batch, but the Data Steward can only reject batches assigned to himself.

How can I cancel a batch process?

You can cancel a batch process using the Scheduled Processes option on the Tools menu of the Navigator. You can search for the batch process on the Scheduled Processes Overview page. Search for the batch process using its process ID received after submitting it using the appropriate setup and maintenance task.

Enter Duplicate Resolution Request

Creating Duplicate Resolution Request: Explained

Create a data quality management request to resolve potential duplicates in the data registry.

Select the value of the Automatic Processing Option as Create duplicate resolution request only to submit duplicate sets as generic resolution requests or None to edit the sets before request selection.

You can create a duplicate resolution request by selecting duplicates in one of the following two ways:

- By searching and selecting duplicates sets manually
- By selecting duplicate sets identified automatically

Manual Selection of Duplicates

This method of duplicate identification allows a user to easily identify parties that need to be merged or linked based on search criteria. The user can pick the duplicate records from the search results and then continue by deciding whether to create a merge or link request.

Application Duplicate Identification

Create a duplicate identification batch to use this method of duplicate identification.

In this method of duplicate identification, the duplicate sets are identified using the embedded data quality matching engine. This method of creating a duplicate resolution request is a two-step process:
1. Run the duplicate identification batch program to identify potential duplicates.
2. Review the duplicate sets identified by the batch program and create either merge or link requests.

Selecting Duplicate Resolution Request Type: Critical Choices

You have the option of selecting any one of the following duplicate resolution request types to resolve potential duplicates in the Oracle Fusion Trading Community Hub registry:

- Merge Request
- Link Request

However, the choice of duplicate resolution request type is a critical one. It determines how the duplicates records in a resolution request are resolved. It also determines how the records that are part of the duplicate resolution request are maintained in the data registry after the duplicate resolution process is complete. Consequently, you must consider the impact of selecting each duplicate resolution request type before you make your choice.

Merge Request

Select the merge duplicate resolution request type to combine the duplicate records into a single new master record.

Note that after the duplicate resolution process is complete, the duplicate records will not exist in data registry any more and that you will be able to make updates only to the sole surviving master record.

Link Request

Select the link duplicate resolution request type to associate together the duplicate records. Note that linked records are first class citizens in the data model and have their own Registry ID.

Records participating in a link have a master-duplicate relationships, in which one of the records participating in the link is designated as a master and others duplicates.

Resolve Duplicate Trading Community Information

Merging Duplicate Records: Explained

Merging involves combining two or more duplicate records into one survivor record.

Merging is one of the two ways of resolving duplicate records. The other way is to link the duplicate records. In a link, an association is created between duplicate records.

Merging duplicate records has the following aspects:
- Creating a merge request
- Reviewing merge request statuses
- Selecting the master record and the records to merge
- Deciding to override system mapping
- Reviewing merge request related notifications

The following figure illustrates the merge process flow:

**Creating a Merge Request**

A merge request can be created as a result of:

- A duplicate resolution request automatically created for each duplicate set identified by the system as a part of the batch duplicate identification process.

- A direct intervention by a user or a data steward who can respectively use the business user merge and the create duplicate resolution request flows to submit a merge.

- A duplicate resolution request created as a part of the bulk or file-based import process.
Note
You can also use the duplicate resolution request webservice to create merge requests.

Reviewing Merge Request Statuses

The possible statuses of a merge request are described below:

- **Pending:** A merge request is created in the pending status. Even a generic duplicate resolution request is created in pending status. This status implies that the merge request requires review by a data steward.
- **New:** The status of a merge request changes to New once the request dispatcher is run and the application selects the master record and attributes based on the survivorship rules and the merge request passes the agreement rule check.
- **Submitted:** Once a merge request has been submitted for processing, its status changes to submitted. A merge request can also be created directly in submitted status to be processed automatically without data steward intervention.
- **Rejected:** A merge request may be rejected either manually by a data steward or by the application for agreement rule violations. A rejected merge request can be restored.
- **Error:** This status is returned if the merge request or any of the records in the request cannot be processed.
- **Completed:** This status is returned if a merge request is processed successfully.

Selecting Master and Records to Merge

After processing a new, generic duplicate resolution request and selecting that the duplicate resolution request type should be merge, you can review the merge request. As part of reviewing the merge request, you can select the master record, mark a record as a nonduplicate, or remove records from the duplicate set to prevent them from being merged. If survivorship is turned on, the master is automatically selected by the system based on the set master rules. However, you can review and override the system selected master, if needed.

Deciding to Override System Mapping

While reviewing a merge request if you are not satisfied with the system mapping of the merge request, you can decide to manually modify the system mapping, including the selection of the master record and its associated attributes. You can select which accounts, account addresses, addresses, and relationships should be merged, transferred, or removed.

Reviewing Merge Request Related Notifications

The party merge process sends the following merge request status related notifications:
• Rejection Notification: This notification is sent to the initiator of the merge request. A merge request can be initiated by a business user, such as a sales person, or an application administrator, such as the Master Data Management Applications Administrator or the Sales Administrator. A rejected merge request can be restored and submitted for processing. It is recommended that before restoring a merge request you try to remove the obstacles to merge by selecting a different master record or removing certain records from the merge request.

• Error Notification: This notification is sent to the initiator and submitter of the merge request. Merge requests are assigned to data stewards for review, processing, and submission.

• Completion Notification: The party merge process not only merges the duplicate parties but also updates the hierarchies to which these parties belong and sends a merge completion notification to the initiator and to the assignee of the merge request. The merge completion notification contains information about the survivor and victim parties and the hierarchies to which they belong. Upon receiving and reviewing the merge notification, the initiator and assignee of the merge request can perform the following actions:
  • On the Manage Hierarchies work area, verify that the hierarchy manipulation done by the party merge process is along expected lines.
  • If required, make the necessary edits to the updated hierarchies.

**Automerge: Explained**

Use this functionality to automatically merge, without any user intervention, confirmed potential duplicates based on resolution requests created programmatically using a Web service. Automerge is critical for customers deploying Oracle Fusion Trading Community Hub to enable processing of large volumes of data, for example for customers of Oracle Fusion sales to merge sales accounts.

For Automerge to take place, the values of the User Merge Requests profile option should be set to Allow Processing Without Approval. If the User Merge Requests profile option is set to this value, user merge requests are processed immediately without requiring any approval from Data Steward.

**Specifying the Automerge Behavior**

While submitting a merge request to be automatically processed, specify the merge behavior and the survivor and victim parties in the Trading Community Merge Request Web Service payload as follows:

• Survivor is sales account and victims include sales account: Retain the survivor’s sell-to address and merge the victim’s sell-to addresses to the survivor’s sell-to address.

• Survivor is not sales account but one victim is sales account: Transfer the victim’s sell-to address to the survivor so that survivor address becomes sales Account.
• Survivor is not sales account but more than one victim is sales account: Specify the victim sell-to address that needs to be retained.

Verifying the status of an Automerge request

Use the Trading Community Merge Result Web Service to retrieve the status of an Automerge request.

The possible statuses of an Automerge request are described below:

• Rejected: This status is returned if the duplicate resolution request was not approved after entering it for review.
• Error: This status is returned if the duplicate resolution request or any of the records in the request cannot be processed.
• Completed: This status is returned if the duplicate resolution request was processed successfully.

Characteristics of Automerge

Some of the characteristics of Automerge are as follows:

• The child entities, such as contact points, relationships, classifications, and cross references, from the nonmaster record are made child entities of the master record.
• The IDs from the nonmaster records should be stored in the cross reference table for use in integration scenarios.
• There are no restrictions on updating the request status to Submitted based on party usage.

Performing Automerge: Worked Example

This example demonstrates how to perform automerge or automatically merge confirmed potential duplicates based on duplicate resolution requests created by invoking the DuplicateResolutionRequestService Web service using Oracle Enterprise Manager (OEM). This example assumes that the survivor is sales account and victims include sales account. Consequently the merge behavior is to retain the survivor’s sell-to address and merge the victim’s sell-to addresses to the survivor’s sell-to address.

Performing automerge involves the following tasks:

• Accessing the DuplicateResolutionRequestService Web Service using OEM
• Creating an automatic merge request
• Finding out the merge result

Note

For Automerge to take place, the values of the User Merge Requests profile option should be set to Allow Processing Without Approval. If the User Merge
Requests profile option is set to this value, user merge requests are processed immediately without requiring any approval from Data Steward.

**Access the Web Service Using OEM**

1. Sign in to Oracle Enterprise Manager.
2. From the Navigation menu, select Fusion Applications - Oracle Fusion Customer Relationship Management.
3. Select CrmCommonApp and then select CRMCommonServer_1.
4. Under the Web Services section, select DuplicateResolutionRequestService and click Test to launch the Web Service Tester.
5. On the Request tab of the Test Web Service Page, select Custom Policy security option and enter the Policy URL syntax `oracle/wss11_username_token_with_message_protection_client_policy` and the username and password for a user who has the ZCH_MASTER_DATA_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB role. For example, in development environments, this could be MDM_ADMIN_V1.

**Create Merge Request**

1. On the Test Web Service Page, select the operation `createMergeRequest` from the Operation drop-down list and enter the following payload:

```xml
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
      <input:record>
        <Master>HZ_PARTIES</Master>
        <SourceSystemReference>100100001834094</SourceSystemReference>
        <SourceSystem>SIEBEL</SourceSystem>
      </input:record>
      <input:record>
        <NonMaster>HZ_PARTIES</NonMaster>
        <SourceSystemReference>100100001834098</SourceSystemReference>
        <SourceSystem>SIEBEL</SourceSystem>
      </input:record>
    </input:createMergeRequest>
  </soap:Body>
</soap:Envelope>
```

2. Click Test Web Service.

3. Review the response to the operation `createMergeRequest` and make a note of the Duplicate Resolution Request ID, which you can use in the operation `getMergeResult` to query the status of the Duplicate Resolution Request.

**Get Merge Result**

1. On the Test Web Service Page, select the operation `getMergeResult` from the Operation drop-down list and enter the following payload:
Managing Rejected Merge Requests: Explained

Managing rejected merge requests involves reviewing and restoring the rejected merge requests.

**Reviewing Rejected Requests**

Review the rejected requests to find out their rejection reasons. Merge requests may be rejected either manually by a data steward or by the application for agreement rule violations.

**Restoring Rejected Requests**

As part of restoring rejected requests, you try to remove the obstacles to merge by selecting a different master record or removing certain records from the merge request and then submit the merge request for reprocessing.

Linking Duplicate Records: Explained

Linking duplicate records involves creating an association between two or more duplicate records. You can use this association to reference member records belonging to a link. In a link, member records remain intact as individual records.

Linking is one of the two ways of resolving duplicate records. The other way is to merge the duplicate records.

A link can be created as a result of duplicate resolution or as a result of direct link without the need for a duplicate resolution request.

**Key Drivers for Linking**

In a merge, duplicate records are combined into one survivor record. However, certain parties cannot be merged because of functional and legal reasons and
technical complexities. For example, for certain bank operations, duplicate records from different business units or from different geographical regions cannot be merged. However, duplicates still need to be identified and resolved in a manner that does not affect transactional systems. Hence, as an alternate option, parties that are identified as duplicates are linked instead of being merged. In a link, parties and the associated child entities such as addresses, contact points, and relationships remain unchanged. Additionally, transactions are not impacted as a result of linking.

Parties are the only records that linking is supported on. Such links are first class citizens in the data model and have their own Registry ID.

Managing links includes creating, viewing, editing, and removing links between duplicate parties.

Records participating in a link have a master duplicate relationship

**Master Duplicate Relationship**

In a link with master duplicate relationship, one of the records participating in the link is designated as a master and others duplicates.

There are many benefits to have a member of the link identified as a master. For example, if a master is identified then it can be picked for use as the party in future transactions, otherwise, the user would have difficulty in picking the right party.

**Manage Links**

**Managing Links: Explained**

The managing links functionality allows searching, viewing, editing, and inactivating links created as a result of either duplicate resolution request or as a result of direct intervention by a data steward to resolve duplicate parties by directly linking them even without a duplicate resolution request.

You can access the managing links functionality by clicking on **Manage Links** on the **Duplicate Resolution** Work Area or by clicking **Linked Parties** in the **Party Center**.

**Searching for Links**

You can look up a link by specifying the party type and search criteria such as link identification number, status, description, or the names of member record.

**Viewing Links**

View the current and previous members of a link. You can also drill down to look at the detail information of each member through the **Party Center**. Based on your analysis, you may decide to edit or delete the link or may even decide to do nothing.
**Editing Links**

Edit an existing link to reflect changes in the data, changes by consuming business processes, or for some other reason such as a record was included by mistake. You can change the master record, search and add new member to the link, and remove a link member. A history of all linked members is also kept, so you can restore any previously removed link member.

**Inactivating Links**

If a link was created by mistake, or a previously created link is no longer valid because of data change, you can delete it. Once you delete a link its status changes from active to inactive.

**Creating Links**

Enter a link name and description and select an appropriate master party type, organization or person, and add two or more parties of that type to create a link. You have the options to set one of the link members as master.

**FAQs for Manage Links**

**What happens if I include a record in a link?**

Records participating in a link remain intact. Only an association is created between members of a link.

**Can I create a link without a duplicate resolution request?**

Yes. Use the managing link functionality to create a link directly. You can access the managing links functionality by clicking on **Manage Links** on the Duplicate Resolution Work Area.

**Can I include a member party in more than one link?**

No. A member party can only participate in one link.

**Can I include members of different party types in a link?**

No. A link must contain members of the same party type.

**How can I access link information?**

Use the managing links functionality to access link information. You can access the managing links functionality by clicking on **Manage Links** on the Duplicate Resolution Work Area or by clicking **Linked Parties** in the Party Center.
Override System Mapping

Override System Mapping: Explained

Overriding system mapping involves manual modification of the system mapping of a merge request including the selection of the master record and its associated attributes, and resolution of selected child entity conflicts and issues.

While manually modifying the system mapping, you can select whether the record attributes such as billing accounts should be merged, transferred, or removed.

Overriding system mapping has the following aspects:

- Selecting Master Record
- Mapping Profile Attributes
- Mapping Customer Accounts
- Mapping Account Addresses
- Mapping Addresses
- Mapping Relationships
- Reviewing and submitting the merge request

Selecting Master Record

Review the records to be merged and select the master record. You can also mark a record as a nonduplicate or remove records from the duplicate set to prevent them from being merged.

Mapping Profile Attributes

As part of this step, for each profile attribute, view and select a value from any of the duplicate records to be preserved in the master record. If required, edit the final value to be associated with the master record by entering the value.

The profile attributes are shown side by side for up to five records. However for more than five records, they are shown in a choice list.

The side by side display of the profile attributes allows the data steward to compare them quickly and to intelligently select the profile attribute values to be retained on the master record and the attributes to be transferred from the victim parties. Using this functionality, a data steward can manually clean up and retain the best of breed party profile attributes for the surviving party.

While viewing the profile attribute value choice list, you can hover over the value to see hover details, including the duplicate record from which the value is coming, to help you decide which value should be associated with the master record.
Mapping Accounts

Select whether the customer accounts of the record being merged should be merged or transferred to the master record or removed altogether.

Mapping Account Addresses

Select which account addresses should be merged, transferred, or removed.

Mapping Addresses

Select which party addresses should be merged, transferred, or removed.

Mapping Relationships

Select which party relationships should be merged, transferred, or removed.

Reviewing and Submitting the Merge Request

Before submitting the override system mapping merge request, review the request details including the selected master party record. View further merge details by clicking on a party category such as relationship.

FAQs for Override System Mapping

Can I override the system mapping for all types of duplicate resolution request?

No. You can override the system mapping only for duplicate resolution request of the type merge.

Process Duplicate Resolution Request

Processing Duplicate Resolution Requests: Worked Example

Suppose you selected Create duplicate resolution request as the Automatic Processing Option, on the Create Duplicate Identification Batch page. At the completion of the duplication identification process, generic duplicate resolution requests are created and appear in the duplicate resolution requests work area, named Overview. On this page, you can complete processing the duplicate resolution requests, including selecting the duplicate resolution request type and submitting them for resolution.

Note

The Process button is disabled if the duplicate resolution request is not new or if the duplicate resolution request type is link or merge.
Processing a Duplicate Resolution Request involves the following tasks:

- Identify the duplicate resolution request
- Selecting the duplicate resolution request type
- Managing the duplicate set

**Identify the Duplicate Resolution Request**

1. Navigate to duplicate resolution requests Overview or home page.
2. Select a new generic duplicate resolution request.

**Selecting Duplicate Resolution Request Type**

1. Click **Process** on the duplicate resolution requests Overview or home page.
2. On the Select Duplicate Resolution Request page, select the duplicate resolution request type as merge to combine duplicate records, link to join duplicate record, or generic to select the duplicate resolution request type later.

**Managing the duplicate set**

1. As appropriate, mark a record as nonduplicate, set as master a record other than the default master record, remove records that you do not want to include in resolution request.
2. Submit the duplicate set as appropriate as merge or link requests for resolution.

**FAQs for Process Duplicate Resolution Request**

*Why am I unable to process a particular duplicate resolution request?*

You can process only a new generic duplicate resolution request. The process button is disabled if the duplicate resolution request is not new or if the duplicate resolution request type is link or merge.

**FAQs for Assign Duplicate Resolution Request**

*Why am I unable to assign or reject duplicate resolution requests?*

Only a Data Steward Manager can assign new duplicate resolution requests. You can initiate the assignment of duplicate resolution requests to an assignee either from the duplicate resolution Overview or the home page or from the Manage Duplicate Resolution Requests page, and complete it on the Assign Duplicate Resolution Requests page. Data Steward Managers can reject any request, but Data Stewards can only reject requests assigned to themselves.
Analyze Trading Community Information:
Analyze Data Quality

Data Completeness Reports: Explained

Data completeness reports allow you to measure, track, and analyze the completeness of the underlying party information of your enterprise, for example organization and person information.

A complete organization record has the following attributes:

- Name having at least two-characters
- At least one contact point: e-mail, phone, or URL
- Address with street, city, state or province, postal code, and country specified

A complete person record has the following attributes:

- First name having at least two-characters
- At least one contact point: e-mail or phone
- Address with street, city, state or province, postal code, and country specified

Use the following data quality reports to monitor and identify data quality problems and to correct and eliminate the sources of poor data quality:

- Record Completeness Snapshot
- Record Completeness Trend
- List of Incomplete Records
- Missing Attribute Information

These reports are generated both for the person and organization records.
Record Completeness Snapshot

These reports display the overall completeness level for organization and person records captured in the latest snapshot.

Record Completeness Trend

These reports provide trend analyses of the completeness of organization and person records over the time and geography dimensions.

List of Incomplete Records

These reports provide drill down on the incomplete organization and person records captured in the latest snapshot for further examinations and corrections.

Missing Attribute Information

Generate completeness reports, such as missing organization and person attribute information, to identify incomplete organization and person records with major attributes missing.

Record Completeness Snapshot Reports: Explained

The Record Completeness Snapshot reports display the overall completeness level for records captured in the latest snapshot.

For example, if the record completeness level in the person or organization record completeness snapshot report is in the green region, it indicates that the overall completeness level is in the acceptable range, which is considered healthy. However, if the completeness level is in the red region, there is cause for concern about the completeness of person and organization record. In such a situation, you need to examine other reports, such as Record Completeness Trend and Missing Attribute Information, to identify the causes of poor data completeness.

The Record Completeness Snapshot has the following variants:

- Organization Record Completeness Snapshot
- Person Record Completeness Snapshot

Organization Record Completeness Snapshot

The Organization Record Completeness Snapshot displays the latest snapshot of the number and the percentage of complete organization records in the system.

Person Record Completeness Snapshot

The Person Record Completeness Snapshot displays the most current snapshot of the number and the percentage of complete person records in the system.
Record Completeness Trend Reports: Explained

The Record Completeness Trend reports provide trend analyses of the completeness of organization and person record over the time and geography dimensions.

They let you filter out the data by year, quarter, month and even week. They also allow you to look at the different record completeness level analyzed against the regions, such as country, state, and province, to ensure that all the regions have satisfactory data completeness. To delve deeper into the causes for the incomplete information and trend, you can drill down on the Missing Attribute Information and the List of Incomplete Records reports.

The Record Completeness Trend has the following variants:

- Organization Record Completeness Trend
- Person Record Completeness Trend

Organization Record Completeness Trend

The Organization Record Completeness Trend report displays the number and the percentage of complete organization records analyzed against the time and geography dimensions.

Person Record Completeness Trend

The Person Record Completeness Trend report displays the number and the percentage of complete person records analyzed against the time and geography dimensions.

List of Incomplete Records Reports: Explained

The List of Incomplete Records reports provide drill down on the incomplete records captured in the latest snapshot for further examinations and corrections.

If required, you can restrict the list of incomplete records by filtering them along the geography dimension using country, State, or Province and in conjunction with the Completeness Score filter. A completeness score of 100 means all major record information is complete.

The List of Incomplete Records Report has the following variants:

- List of Incomplete Organization Records
- List of Incomplete Person Records

List of Incomplete Organization Records

Generate and review the List of Incomplete Organization Records to determine whether the organization records are complete with all the necessary attributes as defined by business process. Major attributes necessary for organization
record completeness include: name; at least one contact point, such as e-mail, URL, or phone; and at least one address.

The completeness score for an organization record = 100 - (Missing E-Mail + Missing Phone + Missing URL + Incomplete Address) / 4. It can have the values 0, 25, 50, 75 or 100. An Address is considered as incomplete if any of the attributes (street, city, state/province, postal code, country) is missing.

To illustrate, you can drill down to the List of Incomplete Organization Records report from the Organization Completeness Trend report and select Country = US, State or Province = CA, and Completeness Score (%) = 25 to examine all the California organization records with a completeness score of 25.

**List of Incomplete Person Records**

Generate and review the list of Incomplete Person Records to determine whether the person records are complete with all the necessary attributes as defined by business process. Major attributes for person record completeness include: first name; last name; at least one contact point, such as e-mail or phone; and at least one address.

The completeness score for a person record = 100 - (Missing E-Mail + Missing Phone + Incomplete Address) / 3. It can have the values 0, 33.33, 66.67, or 100.

**Missing Attribute Information Reports: Explained**

Generate Missing Attribute Information Reports to identify incomplete records with major attributes missing.

For example, if the previous analysis reveals poor data completeness, you can look at the missing attribute information report to identify any particular attribute that is contributing to the poor data completeness. Suppose you generate and review the missing attribute information report and notice that the country has a particularly low completeness rate. Your next step will be to verify the data import UI and process to ascertain if the Country field was missing in the process.

The Missing Attribute Information Report has the following variants:

- Missing Organization Attribute Information report
- Missing Person Attribute Information report

**Missing Organization Attribute Information Report**

Generate and review the Missing Organization Attribute Information report to determine whether the major attributes for an organization are complete, and confirm to the business rules specified for the attribute. Major attributes for an organization are: name, URL, street, city, state or province, postal code, country, phone, and e-mail.

**Missing Person Attribute Information Report**

Generate and review the Missing Person Attribute Information report to determine whether the major attributes for a person are complete, and confirm
to the business rules specified for the attribute. Major attributes for a person are: first name, last name, street, city, state or province, postal code, country, phone and e-mail.

FAQs for Analyze Data Quality

How can I modify the maximum number of rows rendered for the List of Incomplete Records Reports?

To modify the maximum number of rows rendered for the List of Incomplete Records reports, appropriately modify the value specified by configuration element ResultRowLimit in the instanceconfig.xml. For more information, see Using Fusion Middleware Control to Set the Maximum Number of Rows Processed to Render a Table, Oracle Fusion Middleware’s System Administrator's Guide for Oracle Business Intelligence Enterprise Edition 11g.
Manage Trading Community Information: Manage Party Information

Manage Party Information

Party Center: Explained

The party center functionality enables a comprehensive management of party information. A party is a physical entity, such as a person, organization or group, that the deploying company has an interest in tracking. The party center functionality lets you bring a particular party into context, fetch data from various systems about the party in context, and review and edit the data in one location.

The party center enables you to do the following:

- Create Organizations
- Manage Organizations
- Create Groups
- Manage Groups
- Create Persons
- Manage Persons

Party Center Tree

You can select a party from the organizations, person, or groups lists to bring it into context. Once a party is in context, you can fetch, review, and edit its data in the party center. The party entities are displayed as nodes in the party center tree. A party center tree comprises nodes that let you fetch data related to the party in context from various systems, and review and edit the data displayed in each node.

The party center nodes display information, such as profile, profile history, party usage assignments, relationships, source system references, and linked trading community members, about the party in context.
Groups: Explained

Groups enable you to create a party consisting of persons and organizations. A group includes information such as name, type, and certification level, and group party child entities such as addresses, relationships, and classifications. A group type such as Couple, Household, or Joint Ownership classifies a group based on its purpose. A party usage such as Party of Interest, External Payee, or Sales Prospect describes how a group is used in the context of the implementing organization. A group party tree allows you to manage group information and has nodes such as profile, usage assignments, relationships, source system references, and linked parties.

Group Members

A group can have members of party type person or organization. You can assign a member type to a member to define the relationship of the member with the group. For example, you can add member with the member type Group Contact to create a contact for the group. You can manage member of a group from the Profile party tree node of a group.

Party Center Trees: Explained

A party center tree comprises nodes that let you fetch data about the party in context from various systems, and review and edit the data displayed in each node. You can also customize a party center tree by showing or hiding its various nodes as required, reviewing and editing the node names as appropriate, and determining the need for entering additional parameter values to gain access to a node.

There are two types of party center trees:

- Organization: An organization tree displays nodes for organization parties modelled in the trading community foundation across all usages.
- Person: A person tree displays nodes for person parties modelled in the trading community foundation across all usages. All nodes on the person tree are visible to all users.

Each tree displays slightly different nodes, and the information that you can view and edit on each node depends upon your security privileges.

A party center tree may include the following nodes:

- Profile
- Usage assignments
- Linked parties
- Contacts
- Accounts
• Tasks
• Interactions
• Notes

Some of them are explained below:

**Profile**

This node lets you review and edit party profile information such as name, additional names, addresses, contact points, party type, and industry classification categories.

**Usage Assignments**

This node launches a task flow that gives visibility into what party usages have been currently assigned to the party. Party usages that allow manual create, manual update, and unconditional assignment are maintainable through this user interface.

**Linked Parties**

Let you manage the parties linked to the party in context.

**Contacts**

Lets you manage the contact of the party in context and their details such as addresses and contact points.

**Managing Party Center Trees: Explained**

Use the Setup and Maintenance option on the Tools menu to navigate to the Define Customer Hub Configuration tasklist. Go to the Manage Organization 360 Tree task to manage an organization tree and to the Manage Person 360 Tree task to manage a person tree. Alternatively, use the Actions menu options in the regional area of the Oracle Fusion Trading Community Hub to personalize a party center tree.

Specify the following attributes for each node in the party center tree:

• Name
• Visible
• Parameter

**Name**

Set this attribute to specify the name of the node that you want to display in the party center tree.
Visible

Set this attribute to specify the display status, hidden or visible, of a node in the party center tree.

Parameter

Specify the additional parameter values required to gain access to a node.

Party Profile: Explained

The party profile describes basic details of a party such as party details, additional names, additional identifiers, addresses, and contact points. The attributes of a party profile vary depending on the party type and the party usage. Some of the profile attributes such as financial and bank details of the organization are not available during the party creation flow, and can be added by editing the party information. The Edit Profile page for a party lets you set a primary contact point or address for the party. You can also view the history of changes to the profile records in the Profile History page.

Some of the profile attributes such as certification and primary contact details are common for all party types and party usages. The certification fields capture the accreditation awarded to the party after the evaluation of the party by an awarding organization.

The party profile attributes are categorized based on the party type:

• Organization profile attributes: The organization profile attributes includes name, organization information, certification information, legal information, and contact details.

• Person profile attributes: The person profile attributes include person details such as name, address, and contact information.

• Group profile attributes: The group profile attributes includes name, group information, and group members.

Profile History: Explained

Profile history refers to the various versions of the party profile information stored in the Oracle Fusion Trading Community Hub registry. The profile history functionality lets you view the history of changes to profile records of the party, person or organization, in context in the party center. You can also view a party’s profile records that will become effective in the future.
Viewing Profile History Information

Use the From Date and To Date filters to view the profile history for a date range. Note that the current, historical, and the future dated records are sorted by date descending. When multiple changes are done within a day use the sequence of changes on a given date along with effective dates to determine the most recent record. The profile history information also includes changed attributes such as name, legal status, and size.

Change Details

The change details include multiple changes done within a day and also indicate the record that is available to be used in transactions. The old and new values of different attributes, such as name, legal status, and size, are also displayed.

You can export both the profile history information and the change details to spreadsheets.

Party Usage Assignments: Explained

Party Usage Assignments define whether the party usage is manually assigned to a party, or is automatically assigned by a business event. Parties can have multiple usage assignments. For example, an organization can be a Partner and a Customer to another organization. You can manage party usage assignments for a party from the Usage Assignment party tree node.

Conditional Party Usage Assignments

A conditional party usage assignment requires a business event to occur. For example, adding a person as a contact for a group creates contact party usage for the person.

You can assign rules to a conditional party usage assignment to define the business event:

- Assignment rules: Assignment rules are used to define how the party usage can and cannot be assigned to parties.
- Exclusivity rules: Exclusivity rules enable you to restrict party usage assignment, so that between a specified date range the party usage can be the only usage allowed to be assigned to a party.
- Incompatibility rules: You can specify which party usages cannot be assigned concurrently to a party between a defined date range.
- Transition rules: You are able to define which party usages can transition to the party usage you are creating or editing.

Unconditional Party Usage Assignments

You can update unconditional party usage assignments without the need for a business event. For example, you can update the party usage for an organization from a party of interest to a customer without creating an account.
Managing Party Relationships: Explained

Managing party relationships comprises viewing, creating, editing, and deleting all relationships for the party in context in the Party Center. The party in context can be of the type organization, group, or person. Note that you can only view the relationships for the party in context, unless you have the manage privilege.

The relationship model lets you record complex, real-life relationships among various entities such as employees, employers, contacts, and organizations. In other words, a party relationship is a party's role in the context of another party. A few prerequisites to defining party relationships are defining relation types, such as employment or subsidiaries, relationship role pairs, such as employee and employer, and relationship phrase pairs, such as employee of and employer of, that specify details of a relationship type.

Viewing Party Relationships

View all the relationships for the party in context in the Relationships table.

Creating Party Relationships

Create relationships for the party in context by specifying the relationship role, such as customer or subsidiary, the related party name, and the relationship start and end dates for each relationship.

Editing Party Relationships

You can modify the end date information for the relationships for the party in context. You can also edit any additional information captured using descriptive flexfields.

Deleting Party Relationships

Use the delete action to change the status of a relationship to inactive.

Managing Source System References: Explained

Managing source system references comprises managing the cross references between the source system unique identifier and the Oracle Fusion party model unique identifier, for each record created in Oracle Fusion Applications database from the data sourced from one or more source systems.

Managing source system references has the following aspects:

- Understanding the need for source system references or cross references
- Viewing source systems
- Viewing source systems identifiers
- Editing source systems identifiers
- Deleting source systems identifiers
• Adding source systems identifiers

**Understanding the Need for Source System References or Cross References**

Organizations often use multiple software applications to run their businesses. These applications are sometimes supplied by different vendors and run on different databases. This gives rise to the following issues:

• Duplication of records and data across systems

• Logical representation or structure of a record may vary from system to system

• Keeping the data in different systems synchronized, generating a consolidated view, and sharing data across systems becomes highly complex because of the difference in the logical representation

The Oracle Fusion Trading Community Hub resolves all these problems as follows:

• Allows definition of the multiple external systems as source systems: A source system is any data source from which party and other related data can be imported into the Oracle Fusion Applications database. While defining source systems you can specify the type of the source system whether Spoke system, such as a legacy system, or a Purchased system, such as data from a third party provider. You can also specify which objects, such as trading community objects and entities, such as parties only or parties and contacts, are importable from a particular source system.

• Allows creation of records in Oracle Fusion Applications database from one or multiple source systems:

  • Creation of Master Oracle Fusion Applications database records: You can allow multiple source system references to create one master record in the Oracle Fusion Applications database by merging or linking multiple, duplicate records imported from multiple source systems.

  • Creation of Oracle Fusion Applications database records for every source system record: If you do not allow multiple source system references then an Oracle Fusion Applications database record will be created for every source system record. This means that you could potentially create duplicate records in the Oracle Fusion Applications database.

• Uses source system references, also known as cross references, to present a consolidated view: The Oracle Fusion Trading Community Hub maintains a central register of global identities, links to master data in source systems, lists of transformation rules, and a minor subset of information that is needed to aid in matching. At runtime, the hub accesses the source systems’ master data and assembles a point-in-time consolidated view.

**Viewing Source Systems**

View all the source systems contributing to the party in the context from the Referenced Source Systems table.
Viewing Source Systems Identifiers

View all the source system identifier information for the child entities for the party in the context for the source selected from the Referenced Source Systems table.

Editing Source Systems Identifiers

Use the edit action to modify an existing source system reference. Note that the source system, source system reference identifier, and the start date cannot be updated. To change a source system reference identifier, delete the current record and add a new source system reference a new source identifier value.

Deleting Source Systems Identifiers

Use the delete action to change the status of the source system reference to inactive.

Adding Source Systems Identifiers

Use the add action to include a new source system reference.
Manage Trading Community Information: Manage Hierarchy Information

Manage Hierarchy Information

Trading Community Party Hierarchy: Explained

A trading community party hierarchy captures the hierarchical relationships a party has with other parties. This capability is frequently used to capture your customer’s corporate hierarchy and to show how headquarters, branches, subsidiaries, and so on are related. It can be used to capture the hierarchy of any party, and not just of customers.

Organizing customer data as trading party hierarchies offers the following advantages:

- Enables you to understand and get a better view of your customer's organization.
- Enables you to better analyze customer-related data.
- Application modules using the Trading Community Party hierarchy can use hierarchies to roll up transactions, and apply business rules.

You can leverage the party hierarchy of your customers in many Fusion business processes. The Territory Management functionality, for example, uses customer hierarchy information to define account dimensions. Financial applications use customer hierarchy information to process payments from one customer and apply them to another customer in the same hierarchy. The revenue roll-up report uses customer hierarchy information to roll up revenue numbers from opportunities across all customers in a hierarchy.

Fusion has a common framework to manage various hierarchies, called the Tree framework. The Trading community party hierarchy uses this common framework. Use the Manage Hierarchies task to create and modify trading community party hierarchies.

Hierarchies and Hierarchy Versions: How They Fit Together

While creating hierarchies, you need to decide whether you need to create a completely new hierarchy, or whether a new version of an existing hierarchy can suffice.
When to create a new hierarchy

You need to create a new hierarchy when any of the following is true.

- You have a new customer, and a new hierarchy is needed to represent the corporate structure of the new customer.
- Your existing customer has changed the structure of its organization radically, and it is quicker and more efficient to create a new version rather than edit the existing one.

When to create a new hierarchy version

You need to create a new version of a hierarchy when any of the following is true.

- You have minor changes to make to an existing version of a hierarchy, like adding a new customer, removing or repositioning an existing customer in the hierarchy.
- You need to make extensive changes to an active hierarchy, but want to render the changes active only when they are all incorporated into the hierarchy. You can then create a new version of the hierarchy and set it to become active after a reasonable window period. You can then make all the required changes and have the new version ready for activation by the scheduled date.

Hierarchy Edits and Hierarchy Versions: How They Work Together

While editing a hierarchy, you need to decide whether you need to edit the existing version of the hierarchy or create a new one. Any changes made to the existing active version become applicable immediately, while new versions of a hierarchy become active only when the date from which the hierarchy is active is reached.

Editing Party Hierarchies

Edit hierarchy versions to change details of an existing hierarchy version. You need to be aware of the following behavior, however.

- When you edit a hierarchy, your changes are applied, saved, and made available to users even as you make them.
- You cannot cancel any changes while editing hierarchy versions.

This means that you need to be careful while editing active hierarchies, as every change you make is instantly applied and is available to everybody who needs to work with the hierarchy. There are two ways you can deal with the changes, though.

- You can render hierarchies inactive before you edit them. Once you have made your changes, you can change their status to active again. However, the hierarchy will not be available to users while it is inactive.
- You can create a new hierarchy version and set it to be activated the next day. Thus, while the existing version is active and available, you can make
the changes you need to the new version and have it available the next day.

**Editing Party Hierarchies in Response to Merge**

The party merge process not only merges the duplicate parties but also updates the hierarchies to which these parties belong. In case the hierarchy manipulation done by the party merge process is not along expected lines, you can edit the updated hierarchies as required on the Manage Hierarchies work area.

**FAQs for Manage Hierarchy Information**

**How can I create a new hierarchy type?**

Use the Manage Tree Structures task to create a new hierarchy type. Specify Trading Community Model as the application, an existing data source or new custom data source, and any labeling scheme you want. Next, enter the other required details such as the appropriate usage of the new hierarchy type. Add the newly created hierarchy type under the Party Hierarchy Type lookup to include the new hierarchy type in the lookups for hierarchy types.

**Can I create multiple versions of the same hierarchy?**

Yes you can. You only need to ensure that the dates on which the new version is active do not overlap with the dates of any existing active version of the same hierarchy.

**How can I respond to a merge completion notification if I don’t have the privileges to edit hierarchies?**

If you do not have the privileges required to edit hierarchies, reassign the merge completion notification to a user with the appropriate privileges. For example, a sales person can reassign a merge completion notification to the Sales Administrator.

**Why is the hierarchy type I created not visible in the Party Hierarchy UI?**

When you create a hierarchy type, you also need to update the list of hierarchy lookups. Unless the hierarchy lookup list is updated, you cannot use the new hierarchy type.

To update the list of hierarchy types, you need to launch Manage Hierarchy Lookups task and select Party Hierarchy Type (PARTY_HIERARCHY_TYPE) lookup type to edit. Add the new hierarchy type to the Party Hierarchy Type lookup type. Once you have updated the list of hierarchy type lookups and saved your changes, the new hierarchy type is displayed under the list of hierarchy types.

**Why does a newly saved active hierarchy version sometimes get automatically set to inactive?**

The newly edited hierarchy is saved as an auto-commit process by default even before you save and close it. When you save and close your changes,
the application triggers the tree flattening service and the audit job. It doesn't, however, wait for the job to complete, and notifies you to revisit the version after the audit job is complete to check the version status of the hierarchy.

If, for some reason, the audit job identifies any errors at the time of hierarchy validation, the status of the hierarchy is set to Inactive. However, the application does not notify you of this. You need to revisit the hierarchy management interface at a later point and rectify issues in the previously saved version if it is rendered inactive.
Managing Resources: Explained

Managing resources involves viewing and modifying a resource’s profile, organization membership, role assignment, skills, additional contact information, and salesperson information.

While all the resources within the deploying company can view any resource’s profile, only the administrator can manage a resource’s profile, organization and team membership, and role assignment. Managers can modify the skill information of their direct and indirect reports. Resources can only modify their own profiles, skills, and additional contact information.

Managing Resource Profiles

Resource profile management involves managing a user's profile, including the resource's core skills, photo, time zone, additional contact information, and so on. As part of resource profile management, the administrator also needs to specify the dates between which the resource is available to the organization. All the role assignments for the concerned resource must be dated within the time period mentioned in the profile.

Managing Organization Membership

At any point in time, a resource belongs to an organization and can be assigned to any other organization within the deploying company as well. Only the administrator can perform this task.

Managing Resource Role Assignment

The administrator or the organization manager can assign or modify resource roles within an organization, where only one role can be assigned to a resource at a time. However, outside organizations, resources can be assigned multiple roles as required. Only the administrator can assign roles outside organizations.

Note
1. Dates of resource role assignment need to be inside the date range within which the resource is active within the deploying organization.

2. There can be only one manager in an organization.

Resource Directory: Explained

The Resource Directory offers detailed information about all the resources within the deploying organization. The Resource Directory also enables you to find and communicate with other resources, and to network and collaborate with them.

Use the Resource Directory to perform the following tasks:

- View and modify your profile
- View your organization and team membership information
- View information related to other organizations and teams
- View the profiles of other resources
- Communicate with other resources

Managing Contact Preference Information: Explained

Managing contact preference information includes creating and editing preferences about contact permissions and restrictions.

Creating Contact Preference Information

You create contact preference information from the Oracle Fusion Customer Center application. When you are viewing Address or Contact Point information for a customer or contact, you can select a specific address or contact point, and choose Manage Contact Preferences from the Action menu. You capture whether there is a restriction (Do not) or permission (Do) in the Preference attribute, and a Reason Code for such preference. You record a specific start date and can set an end date for the preference. The application is delivered with the start date set to the current date, and the end date to null.

Reviewing Contact Preference Information

On seeing the Do Not Contact icon, you must review contact preference information for restrictions before taking any action. You can review the contact restriction information by clicking either on the Do Not Contact icon or on the appropriate option from the action menu. Note that do not contact entries are made against each phone, E-mail, and address and not at the organization or person level. If restrictions are present for a phone number, the click-to-dial action is disabled.

Privileges Required for Managing Contact Restriction Information

Contact restriction information, such as opting in or out of the Public Do Not Call Registry, is captured as a Reason Code. Regular business users, such as sales representatives and managers, can create and edit contact preference
information with any Reason Code that is not identified as Legal. However, to be able to create and edit contact restriction information using a Reason Code that is tagged as Legal, you require the Legal Contact Preferences Management duty role. This duty role is available only to the users with application administrator roles, such as, a Sales Administrator.

A Reason Code can be setup as Legal by tagging the Reason Code lookup value in the lookup type REASON_CODE with the value LEGAL using Manage Trading Community Common Lookups task.

**Updating Resource Skills: Examples**

This example illustrates the various contexts in which you can update your skills in Oracle Resource Management.

You can add a wide range of skills into Oracle Resource Management. For the sake of convenience, let us categorize these into core skills, achievements, and mandatory requirements.

Each of these skills need to be used in specific contexts as described below.

**Updating Core Skills**

Skills that reflect your key abilities can be categorized under the Core Skills head. Thus, competencies, degrees, languages, licenses and certifications, skills, and problem codes can be considered core skills.

- Use the Competencies option to record your key abilities as a resource. For instance, if you have the ability to quickly internalize and analyze complex information, list it here.

- Use the Degrees option to record your educational degrees.

- Use the Language option to record your proficiency with the various languages you know.

- Use the Licenses and Certifications option to record any educational licenses and certifications you may have received. For instance, if you have a Six Sigma certification, list it here.

- Use the Skills option to list out any specific software or engineering skills you may have. You can search for these skills by category, product, platform, or component.

- Use the Problem Code option to record your ability to manage and remedy specific service-related problems that may arise within your company. For instance, if you are skilled at troubleshooting hardware issues, list it here.

**Updating Achievements**

Skills that reflect your key achievements and uncommon abilities can be categorized under the achievements head. Thus, accomplishments and honors and awards can be considered achievements.

- Use the Accomplishments option to record any major task you completed that reflects your abilities as an individual. For instance, if you completed a rather difficult task in a short deadline, list it here.
• Use the Honors and Awards option to record any special honors or awards you may have received. For instance, if you were the recipient of a certificate of merit award, list it here.

Updating Mandatory Requirements

Skills that capture your having met with requirements mandatory for your employment can be categorized under the mandatory requirements head. Thus, pre-entry job requirements and work requirements can be considered mandatory requirements.

• Use the Pre-entry Job Requirements option to update all pre-entry job requirements you have met. For instance, many companies require you to take a medical test before you join. If you took such a test before you joined the company, list it here.

• Many roles have specific requirements that employees need to fulfil before these roles can be assigned to them. Such requirements can be listed out under the Work Requirements head. For instance, if you are willing to travel overseas on duty, you need to enter this information here.

FAQs for Manage Resource Information

What's the Resource Directory?

The Resource Directory offers a comprehensive view of resources in the deploying organization. Use the Resource Directory to find and communicate with other resources, and to network and collaborate with other resources in the system.

Resources can access the Resource Directory to view and modify their own resource information and the information of their direct reports. Resources can also use the Resource Directory to view their organization and team membership details.

What's a sales person set?

Sales person sets enable you to organize sales personnel within the deploying company. For instance, you could have sales person sets that organize your sales teams based on their region of operation. Thus, you could have separate sales person sets for sales teams working with customers in the Americas, Europe, Asia, etc.

Use sales person sets to control access to sensitive data within the deploying company. For instance, only members of the sales person set that comprises sales persons working out of Asia need access to data like addresses and phone numbers of your customers in the Asian region.

Can I assign multiple concurrent resource roles to an organization member?

No. While you can assign multiple roles to an organization or team member, the roles cannot be concurrent. This means that at any point in time, a resource can have only one role in an organization.
How can I search and view information of other resources?

You can search for resources and view their public profiles using the Resource Directory. You can search for resources either by name or organization, or by the names of the teams to which they belong.

The Resource Directory enables you to view the following details of a resource's profile:

- Key profile information, including the resource's name, manager's name, job title, contact information, etc.
- Organization membership information
- Team membership information
- Roles of the resource
- Key skills of the resource
- Additional contact information
- Salesperson details, if applicable.

Instead of searching for users, you can also search for organizations or teams, view the list of resources who belong to an organization or team, and view the profiles of any resource listed.

Can I add resources outside my reporting hierarchy to my social network?

Yes. Use the Resource Directory to view the public profile of all active resources within the deploying company and to add them to your social network.

To add a resource to your social network, you need to search for the resource with whom you wish to make a connection, view the concerned resource's detailed profile, and add the resource as a connection using the Contextual Action interface. Once the resource accepts your connection request, the resource becomes a part of your social network.

Manage Resource Organization Information

Resource Organizations and Organization Usage: Explained

You can assign organization usage information to resource organizations to classify them based on how they can be used. For instance, resource organizations engaged in sales activities can be assigned the Sales Organization usage. This enables you to sort organizations based on their usage, simplifying your task of working with them.

Resource Role and Resource Organization Components: How They Work Together

A single resource is allowed to be associated with multiple organizations to support multiple organizational hierarchies and matrix reporting relationships.
Within each of these organizations, the resource may play different roles. The organizations and organization hierarchies that a resource is in determines the reporting relationships for that resource.

**Resource Roles**

A resource role denotes the function of a resource in an enterprise from the perspective of the deploying company. Resource roles are used to not only describe who a resource is in the enterprise, but also what specific role the resource performs within the context of an organization or team. Thus, the same resource could have different roles across multiple organizations.

**Note**

A resource can only be assigned one role at a time.

**Resource Organizations**

Resource organizations represent the internal organization and structure of the deploying company. Resource organizations are hierarchically structured, and reporting relationships are derived from the organization hierarchy that is created. Thus, a resource can be a part of different organizations within the deploying company, and may also have separate roles in each.

**FAQs for Manage Resource Organization Information**

**Why am I unable to view the resource hierarchy for my organization?**

For a resource or reporting hierarchy to be visible, it is necessary to have a reporting structure enabled in your organization. If there is no manager defined for an organization, the reporting hierarchy of the organization cannot be constructed. Please check if your organization has been assigned a manager in Resource Management.

**What's the difference between a resource organization and a resource team?**

A resource organization is an organization whose members are resources. Resource organizations are used to implement sales organizations, partner organizations, and so on.

A resource team is a temporary group of resources formed to work on work objects. A resource team may contain a resource organization or resources or both. A resource team cannot be hierarchically structured and is not intended to implement an organization.

**Can I remove a resource organization membership while active assignments exist?**

Yes. Once you delete a resource organization membership, the application checks if the concerned resource has any active assignments within the organization. If
any active assignments are found, the application displays a warning message informing you of the active assignments and asking you whether you still wish to remove the membership. Once you confirm the deletion, the resource organization membership is removed, and all active assignments are cancelled too.

**Can I update organization membership details?**

Yes. You can update the membership details of an organization by searching and clicking on the organization whose membership you need to update. Once its details are displayed, click the Members tab. This displays a list of the members of the organization. Use the Create button to add more members, the Edit button to update the roles of existing members, or the Delete button to remove members from the resource organization.

**Can I view a resource organization hierarchy version as of a particular date?**

Yes. Unless otherwise specified, organization hierarchies are active from the date they are created. To view the hierarchy of a resource organization at a specific date, navigate to the View Organization Hierarchies page, search and select the organization hierarchy whose details you wish to view. This displays the View Organization Hierarchy page, where the concerned organization’s active hierarchy is displayed. A drop-down list at the top of the screen displays the date from which the current organization hierarchy has been active. Click the list and, from the options available, select the date you need. This displays the version of the organization hierarchy as of the date you selected.

**Manage Resource Team Information**

**Resource Members, Role Assignment Dates, and Active Dates: How They Work Together**

Every resource in the deploying company has start and end dates of activity specified. When you assign resources to teams, you need to ensure that their dates of assignment fall within their active dates.

**Resource Active Dates and Resource Assignment**

When you identify internal or partner member employees as resources, you can specify the time period for which they are active within the organization. By default, the date of identification is chosen as the start date, while there is no end date listed. This means that by default, an identified resource is active from the day of activation forever. This means that theoretically, you can assign the resource to any organization or team for an infinite period. However, once you specify an end date for a resource, you cannot assign the resource to any team or organization for periods that lie beyond the active period you specified.

**Resource Skills and Resource Assignment**

To get the best out of resources, you need to ensure that their skills are relevant to the team or organization within which you deployed them.
Once you have ascertained that a resource's skill set matches the needs of an organization or team, you can deploy the resource as appropriate for a period of time that falls within the active dates specified for the concerned resource.

**FAQs for Manage Resource Team Information**

**What's a resource team?**

A resource team is a group of resources formed to work on work objects. A resource team may comprise resource organizations, resources, or both. A resource team cannot be hierarchically structured and is not intended to implement an organization structure. You can also use resource teams as a quick reference to groups of related resources that you can quickly assign work objects to.

---

**Note**

Members of teams can either be reassigned separately, or entire teams can be assigned to other tasks as required.

---

**Can I assign multiple resource roles to a team member at the same time?**

Yes. Resources within resource teams can have multiple resource roles. To add roles to a resource in a resource team, display the details of the resource team using the Manage Resource Team link, select the resource who needs to be given additional roles, and click the Edit button to add more roles. Once you have assigned the required roles to the resource, click Save and Close to exit the screen.
**data cleansing**
Identifying and correcting incomplete, corrupt, or inaccurate records such as addresses.

**enterprise**
An organization with one or more legal entities under common control.

**matrix reporting**
Matrix reporting enables a resource to belong to more than one organization at a time. Thus, a resource can be a member of two organizations, for example, and report simultaneously to two different managers.

**organization**
An organizing unit of an enterprise that provides the framework for performing legal, management, and financial control and reporting. Organizations can represent departments, sections, divisions, business units, companies, contractors, and other internal or external units of the enterprise. Organizations can have multiple classifications. Oracle Fusion Projects uses organizations that are classified as project and task owning organizations and project expenditure organizations.

**organization hierarchy**
A tree structure that determines the relationships between organizations, such as which organizations are subordinate to other organizations.

**party**
A physical entity, such as a person, organization or group, that the deploying company has an interest in tracking.

**resource**
People designated as able to be assigned to work objects, for example, service agents, sales managers, or partner contacts. A sales manager and partner contact can be assigned to work on a lead or opportunity. A service agent can be assigned to a service request.

**resource organization**
An organization whose members are resources. Resource organizations are used to implement sales organizations, partner organizations, and so on.

**resource role**
Resource roles indicate the role a resource plays as an individual, or within a resource team.
**resource skills**

A resource skill is a self-proclaimed, self-rated knowledge set that a resource has. Skills are defined in terms of categories, products, components and platforms.

**resource team**

A resource team is a temporary group of resources formed to work on work objects. A resource team may contain a resource organization or resources or both. A resource team cannot be hierarchically structured and is not intended to implement an organization.

**simulated cleansing**

A mode for batch cleansing in which the results are available for preview before they are saved in the database.