Oracle® Customer Data Librarian

Implementation Guide

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Oracle Customer Data Librarian Implementation Guide, Release 12.2

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Oracle Customer Data Librarian Implementation Guide, Release 12.2

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

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Customer Data Librarian Implementation Guide.*

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

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

If you have never used Oracle E-Business Suite we suggest you attend one or more of the Oracle E-Business Suite training classes available through Oracle University.

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to 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.

Structure

A Reports and Processes

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

B Oracle Customer Data Librarian Profile Options and Profile Option Categories

Related Information Sources

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

Integration Repository

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

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

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

Online Documentation

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

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.

- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

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

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

Guides Related to This Product

Oracle Common Application Calendar Implementation Guide

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

Oracle Common Application Calendar User Guide

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

Oracle Customer Data Librarian User Guide

Oracle Customer Data Librarian enables you to import customer information from external systems into the Oracle Trading Community Architecture Registry and manage the quality of this information. Quality includes data consolidation and completeness and the removal or merge of duplicate and unnecessary information. In addition, Oracle Customer Data Librarian contains all of the features in Oracle Customers Online, including purchasing information from D&B to enrich your customer data and mapping customer records to their source systems.

Oracle Customers Online Implementation Guide

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

Oracle Customers Online User Guide

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

Oracle Financials Concepts Guide

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

Oracle Financials Implementation Guide

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

Oracle Receivables Implementation Guide

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

Oracle Receivables Reference Guide

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

Oracle Receivables User Guide

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

Oracle Trading Community Architecture Administration Guide

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

Oracle Trading Community Architecture Reference Guide

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

Oracle Trading Community Architecture Technical Implementation Guide

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

Oracle Trading Community Architecture User Guide

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

Installation and System Administration

Oracle Alert User's Guide

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

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite CRM System Administrator's Guide

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

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

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

Oracle E-Business Suite Maintenance Guide

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

Oracle E-Business Suite Security Guide

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

Oracle E-Business Suite Setup Guide

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

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

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

Other Implementation Documentation

Oracle Approvals Management Implementation Guide

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

Oracle Diagnostics Framework User's Guide

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

Oracle E-Business Suite Flexfields Guide

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

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

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

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

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

Oracle E-Business Suite Multiple Organizations Implementation Guide

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

Oracle e-Commerce Gateway Implementation Guide

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

Oracle e-Commerce Gateway User's Guide

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

Oracle iSetup User's Guide

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

Oracle Product Hub Implementation Guide

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

Oracle Product Hub User's Guide

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

Oracle Web Applications Desktop Integrator Implementation and Administration Guide

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

Oracle Workflow Administrator's Guide

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

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle XML Gateway User's Guide

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

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

Oracle XML Publisher Administration and Developer's Guide

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

Oracle XML Publisher Report Designer's Guide

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

Training and Support

Training

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

You have a choice of educational environments. You can attend courses offered by

Oracle University at any of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

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

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

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

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

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

License for Oracle Customer Hub Steward

This chapter covers the following topics:

- License

License

Customer Hub Data Steward:

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

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

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

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

D&B Data Integration Toolkit

This Oracle software product includes D&B Data Integration Toolkit software from Dun & Bradstreet, Inc. (D&B). However, you do NOT receive a license to use the D&B software under your agreement with Oracle. The D&B software must be separately licensed from D&B.

To purchase a license to the D&B Data Integration Toolkit software and/or D&B information about businesses, you must have a separate contract with D&B for the Toolkit and/or its Data Rationalization Service, as applicable. Contact your D&B relationship manager to contract for the software or services that meet your data requirements. If you do not have a relationship manager assigned to your company, contact D&B's Global Service Center at (888) 243-4566, or visit http://www.dnb.com. You can also contact DB for information to interpret credit ratings and other information that D&B provides.

2

General Implementation

This chapter covers the following topics:

- Overview
- Assigning Responsibilities to Users

Overview

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

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

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

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

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

Assigning Responsibilities to Users

Set up individual users of Oracle Customer Data Librarian. These responsibilities are available for CDL users:

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

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

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

To Assign Responsibilities to Users:

Responsibility: System Administrator

See: Users Window, *Oracle E-Business Suite Security Guide*.

Related Topics

Overview, page 2-1

3

Feature-Specific Implementation

This chapter covers the following topics:

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

Feature-Specific Implementation Overview

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

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

user-entered data are displayed, created, and overwritten.

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

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

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

Related Topics

Overview, page 2-1

Setting Up De-Duplication

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

- Identifying duplicates using Smart Search.
- Identifying duplicates using System Duplicate Identification (SDI) batches.
- Automatically merging parties identified as definite duplicates as part of creating SDI batches.
- Identifying duplicates of organization or person using Integration Services in business object APIs and Create or a Save (create operation) Web services are used.
- Searching for specific addresses or relationships, within a single party or a set of duplicate parties, for mapping purposes.
- Generating suggested defaults for address mapping.
- Generating suggested defaults for relationship mapping.

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

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

To Set Up De-Duplication:

1. Set up Data Quality Management. See: Administering Data Quality Management, *Oracle Trading Community Architecture Administration Guide*. Make sure to:

   - Run the DQM Staging program to create the staged schema.

   - Periodically run the DQM Synchronization program to update the staged schema.

   - Compile all match rules that you plan to use.

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

   - To create match rules to be used for Automerge in System Duplicate Identification batch creation, you must define the match rules as allowed for Automerge.

   - If you create a new rule for identifying duplicates using Smart Search, the search criteria shown in the user interface will change based on your acquisition and scoring attributes. If you define a match rule set, the superset of all attributes in the set would be the search criteria.

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

   - For searching for addresses and relationships to map, the search criteria are always the same. The match rule affects only the scoring. Your custom match rules should have the same scoring attributes as the DL ADDRESS AND RELATIONSHIP SEARCH match rule, which is the seeded match rule for this purpose.

2. Optionally use the DUP_BATCH_RESTRICTION_LIST Receivables lookup to define the list of attributes that appear in the System Duplicate Identification Batches page. These attributes are used as restriction criteria for creating SDI batches. You can add any attribute from the HZ_PARTIES table to the list. See: Defining Receivables Lookups, *Oracle Receivables Implementation Guide*.

3. For address validation information to be displayed when users map duplicate addresses, set up and run address validation at a frequency that fits your needs. See: Setting Up Address Validation, *Oracle Trading Community Architecture Administration Guide* and Address Validation, *Oracle Trading Community Architecture User Guide*.

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

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

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

5. If you have source system data in the TCA Registry and are using Single Source of Truth rules, make sure that source system data can be overwritten in the

de-duplication process. Users might not be able to complete certain merges if they do not have full overwrite privileges. See: Single Source of Truth Overview, *Oracle Trading Community Architecture Administration Guide*.

1. Create a user overwrite rule that allows update of all attributes. See: Setting Up User Overwrite Rules, *Oracle Trading Community Architecture Administration Guide*.

2. Set the HZ: User Overwrite Rule profile option at one or more levels using the rule that you created. If this profile option is set at the responsibility level, make sure that a conflicting or different rule is not set at the user level. See: Source System Management Setup, *Oracle Trading Community Architecture Administration Guide*.

Related Topics

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

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

Feature-Specific Implementation Overview, page 3-1

Setting Up Import

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

1. Loading source files of data into the import interface tables.

2. Transferring batches of data from the interface tables into the TCA Registry.

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

To Set Up Import:

1. Set up as you would for TCA Bulk Import. See: Setting Up Bulk Import, *Oracle Trading Community Architecture Administration Guide*.

2. Set these profile options:

   - HZ: Import Batch De-Duplication Match Rule

   - HZ: Import Registry De-Duplication Match Rule

   - IMC: Import Preview Processing Results

   - IMC: Import Run Address Validation

- IMC: Import Run Batch De-Duplication
- IMC: Import Run Registry Match

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

> **Tip:** To optionally set up automatic import into the Registry after file load, you must set additional profile options. See: Setting Up Import, *Oracle Customers Online Implementation Guide*.

Related Topics

Import Overview, *Oracle Customer Data Librarian User Guide*

Setting Up Party Maintenance

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

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

To Set Up Party Maintenance:

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

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

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

2. Assign the match rule you want to use for search to the appropriate profile option:

- **Organizations:** HZ: Match Rule for Organization Simple Search

- **Persons:** HZ: Match Rule for Person Simple Search

  See: Data Librarian Setup, page B-14.

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

Related Topics

Maintaining Parties, *Oracle Customer Data Librarian User Guide*

Feature Specific Implementation Overview, page 3-1

A

Reports and Processes

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

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

Reports

D&B Global Data Products Request Report

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

Processes

Copy Relationship Type and All Relationships

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

Copy Organization Extensions Data for Profile Versioning

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

Copy Person Extensions Data for Profile Versioning

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

Trading Community Architecture Administration Guide.

DQM Compile All Rules

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

DQM Index Optimization Program

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

DQM Staging Program

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

DQM Synchronization Program

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

Flatten Employee Hierarchy

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

Flatten Group Hierarchy

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

Generate Key for Fuzzy Match

Generates keys for fuzzy search.

Generate Request List for D&B Batch Load

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

Generate Time Zone for Locations

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

Generate Time Zone for Phone Numbers

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

IMC: Refresh Summary Information for Quality Reports

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

IMC: Refresh Summary Information for Reports

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

Load D&B Data (8i Implementation)

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

Rebuilding Intermedia Index for Task Names

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

Refresh of Classification Denormalization

Populates and refreshes the HZ_CLASS_CODE_DENORM denormalization table. See: Refresh of Classification Denormalization, *Oracle Trading Community Architecture Administration Guide*.

Source System – Migrate Party Level Source System References

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

Synchronize Employees

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

Synchronize JTF_NOTES_TL_C1 index

Affects notes in the Home and Customers tabs.

Third Party Data Integration Update

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

B

Oracle Customer Data Librarian Profile Options and Profile Option Categories

This appendix covers the following topics:

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

Profile Options and Profile Option Categories Overview

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

See: *Oracle E-Business Suite Seucrity Guide*

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

Customer Data Librarian Categories

- Data Librarian Deployment, page B-3
- Data Librarian Import Setup, page B-4
- Data Librarian Mapping Setup, page B-9
- Data Librarian Setup, page B-14
- Data Librarian Security, page B-16

See: *Oracle E-Business Suite Setup Guide*

Customer Data Librarian Profile Options

- HZ: Data Sharing and Security Rules for Data Librarians, page B-16
- HZ: Default Profile Attributes for Merge Mapping, page B-11

Profile Option Category and Profile Options Descriptions

This section describes profile options by category.

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

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

The key for each table is:

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

Data Librarian Deployment Category

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

Data Librarian Deployment Category

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

HZ: Number of Workers for DQM Duplicate Identification Program

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

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

HZ: Protect Party Modeling Before Merge

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

Data Librarian Import Setup Category

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

Data Librarian Import Setup Category

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

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

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

HZ: Import Batch De-Duplication Match Rule

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

HZ: Import Registry De-Duplication Match Rule

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

IMC: Import Preview Processing Results

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

IMC: Import Run Address Validation

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

IMC: Import Run Batch De-Duplication

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

IMC: Import Run Registry Match

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

HZ: Preview Import Process Results

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

HZ: Run Import Address Validation

Determine whether or not to run address validation for import.

HZ: Run Import Batch De-Duplication

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

HZ: Run Import Registry De-Duplication

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

IMC: Automate CSV File Load into TCA

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

IMC: CSV Batch De-Duplication Action

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

IMC: CSV Batch De-Duplication Match Rule

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

IMC: CSV Batch Registry Match Rule

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

IMC: Run CSV Batch Address Validation

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

IMC: Run CSV Batch De-Duplication

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

IMC: Run CSV Batch Registry Match

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

Related Topics

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

Import Overview, *Oracle Customer Data Librarian User Guide*

Data Librarian Mapping Setup Category

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

Data Librarian Mapping Setup Category

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
HZ: Default Profile Attributes for Merge Mapping, page B-11	Update	Update	Update	Update	Update	Update
HZ: Default Secondary Profile Attributes for Merge Mapping, page B-11	Update	Update	Update	Update	Update	Update
HZ: Enable DQM Merge Suggestion, page B-11	Yes	Update	Update	Update	Update	Update

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
HZ: Match Rule for Address Mapping Suggestions, page B-12	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Address Search, page B-12	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Relationship Mapping Suggestions, page B-12	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Relationship Search, page B-13	Update	Update	Update	Update	Update	Update
HZ: Merge Master Party Defaulting, page B-13	Update	Update	Update	Update	Update	Update
HZ: Show Address Mapping Suggestions, page B-14	Update	Update	Update	Update	Update	Update
HZ: Show Relationship Mapping Suggestions, page B-14	Update	Update	Update	Update	Update	Update

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
IMC: Display Notes for Merge Request Mapping, page B-14	Update	Update	Update	Update	Update	Update

HZ: Default Profile Attributes for Merge Mapping

Specify the method for defaulting party profile attributes for merge. For each duplicate set with multiple parties, the selected method determines which profile attribute values default as the ones that remain after the merge. For Automerge, the defaulted attributes values automatically remain after merge.

For example, if *Master Party* is selected, the default value for each attribute comes from the master party. Likewise, attribute values are from the party with the latest update date, if that is the selected method.

The method from the HZ: Default Secondary Profile Attributes for Merge Mapping profile option, page B-11 is used instead if you select:

- **Master Party:** But the master party does not have a value for the attribute.
- **Most Frequent Value:** And multiple values fulfill this condition for the attribute.

HZ: Default Secondary Profile Attributes for Merge Mapping

Set this profile option if you select *Master Party* or *Most Frequent Value* for the HZ: Default Profile Attributes for Merge Mapping profile option, page B-11. The selected secondary method is used if the method from the other profile option does not provide a conclusive default.

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

HZ: Enable DQM Merge Suggestion

Use this profile option to turn off DQM for merge suggestion. The merge process uses DQM for default suggestions during pre-processing due to which the Create Merge Batch process takes a longer time to complete.

Select 'No' to disable DQM at the time of merge suggestion so that the Create Merge batch program runs faster. This also disables the Change Grouping list in the Address

Mapping and Relationship-Mapping window.

Select 'Yes' / 'Null' to enable DQM to suggest duplicate address and relationships automatically. The Change Grouping option is enabled if you select 'Yes'. The default value for this option is 'Yes'.

HZ: Match Rule for Address Mapping Suggestions

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

> **Note:** The selected match rule also determines which addresses are merged together during Automerge. Make sure that the match rule makes sense for both purposes.
>
> The records are automatically merged only if the HZ: Use DQM Suggested Groupings for Automerge profile option is set to *Yes*. If you do not set a match rule, then records are not merged, but transferred from duplicate candidates to the merge master party. See: *Oracle Trading Community Architecture Administration Guide*.

HZ: Match Rule for Address Search

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

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

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

HZ: Match Rule for Relationship Mapping Suggestions

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

> **Note:** The selected match rule also determines which relationships are

merged together during Automerge. Make sure that the match rule makes sense for both purposes.

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

HZ: Match Rule for Relationship Search

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

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

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

HZ: Merge Master Party Defaulting

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

If multiple parties fulfill the condition for these methods:

- Party with Earliest Creation Date
- Party with Highest Certification
- Party with Latest Creation Date
- Party with Latest Update Date
- Manual
- Party with Most Accounts
- Party with Most Addresses
- Party with Most Relationships

- User Hook

HZ: Show Address Mapping Suggestions

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

HZ: Show Relationship Mapping Suggestions

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

IMC: Display Notes for Merge Request Mapping

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

Related Topics

Setting Up De-Duplication, page 3-2

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

Data Librarian Setup Category

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

Data Librarian Setup Category

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

Profile Option	Default	User Access	System Administration: Site	System Administration: Application	System Administration: Responsibility	System Administration: User
HZ: Match Rule for Organization Simple Search, page B-15	Update	Update	Update	Update	Update	Update
HZ: Match Rule for Person Simple Search, page B-16	Update	Update	Update	Update	Update	Update

HZ: Match Rule for Identifying Duplicates with Smart Search

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

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

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

HZ: Match Rule for Organization Simple Search

Specify the seeded or user-defined match rule for determining the search criteria and results for the organization simple search. Use match rules with the Search purpose. The profile option defaults to the HZ_ORG_SIMPLE_SEARCH_RULE seeded match rule. See: HZ_ORG_SIMPLE_SEARCH_RULE, *Oracle Trading Community Architecture Reference Guide*.

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

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

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

HZ: Match Rule for Person Simple Search

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

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

> **Important:** This match rule also applies to the person simple search on the Home and Organizations pages. Select a match rule that works for both purposes.
>
> If you select a match rule set, the displayed search criteria are the superset of all attributes in the set.

Data Librarian Security Category

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

Data Librarian Security Category

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

HZ: Data Sharing and Security Rules for Data Librarians

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

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

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