

# **Oracle® Trading Community Architecture**

User Guide

Release 12.2

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Oracle Trading Community Architecture User Guide, Release 12.2

Part No. E48950-02

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# Contents

## Send Us Your Comments

## Preface

## 1 Overview

Introduction to Oracle Trading Community Architecture.....	1-1
Customers Overview.....	1-2
Oracle Customer Data Management.....	1-4
Using Oracle Trading Community Architecture.....	1-5

## 2 Bulk Import

Bulk Import Overview.....	2-1
Loading Data into the Interface Tables.....	2-2
Interface Tables.....	2-7
Import Batch to TCA Registry.....	2-9
Import Batch De-Duplication Report.....	2-12
Import Process.....	2-12
Import Address Validation.....	2-14
Matching Records with Source System Management.....	2-14
Import Validations.....	2-16
Postimport Processes.....	2-17
Resolving Import Errors.....	2-18
TCA Import Batch Purge.....	2-19

## 3 Customer Interface

Customer Interface.....	3-1
-------------------------	-----

Preparing for Import.....	3-5
Interface Data Required to Run Customer Interface.....	3-6
System Tables Updated by Customer Interface.....	3-11
A Sample Customer Import.....	3-13
Creating Unique Customer References.....	3-17
Importing Customers Using Customer Interface.....	3-18
Customer Interface Transfer Report.....	3-20

## 4 Third Party Data Integration

Third Party Data Integration Overview.....	4-1
Introduction to D&B.....	4-3
Data Products.....	4-3
Business Information Report (BIR).....	4-6
Data Elements.....	4-7
Source System Management Impact.....	4-7
Mapping of D&B Data Elements.....	4-9
Details on Creating Parties with D&B Information.....	4-10
Online Purchasing.....	4-10
Process Overview.....	4-10
Searching for Existing Parties in the TCA Registry.....	4-12
Searching for Companies in the D&B Database.....	4-12
Selecting Data Products or BIRs.....	4-13
Requesting D&B Investigations.....	4-15
Mapping API Utility.....	4-16
Load D&B Data.....	4-22
Batch Loading.....	4-22
Process Overview.....	4-23
Generate Request List for D&B Batch Load.....	4-24
Transferring a Request List File to D&B.....	4-26
D&B Import Adapter.....	4-26
Loading Rationalized Legacy Data.....	4-28
Viewing Information from Data Sources.....	4-29
Subtabs of Information.....	4-29
Duplicate DUNS Report.....	4-31
DNB Global Data Products Request Report.....	4-32

## 5 Locations and Phones

Locations Overview.....	5-1
Address Formatting.....	5-2
Real-Time Address Validation.....	5-3

Batch Address Validation.....	5-6
eLocations Spatial Data Integration.....	5-8
Spatial Information for Locations Batch Update.....	5-9
Generate Time Zone for Locations.....	5-11
Generate Time Zone for Phone Numbers.....	5-11

## 6 Relationship Manager

Relationship Manager Overview.....	6-1
Relationships Overview.....	6-2
Relationship Characteristics.....	6-3
Major Features.....	6-4
Party Relationship Management Process.....	6-5
Searching for Parties and Viewing Results.....	6-7
Viewing Relationships.....	6-8
Creating Relationships.....	6-8
Editing Relationships.....	6-10
Viewing Relationship Hierarchies.....	6-11
D&B Hierarchy.....	6-13
Updating Relationships by Moving Parties in a Hierarchy.....	6-17

## 7 Batch Duplicate Identification

Batch Duplicate Identification Overview.....	7-1
Defining Duplicate Identification Batches.....	7-3
Reviewing Duplicates and Creating Merge Batches.....	7-5
Submitting Merge Batches.....	7-9

## 8 Party Merge

Party Merge Overview.....	8-1
Party Merge Details.....	8-3
Party Merge Example.....	8-4
Duplicate Checking.....	8-5
Impact on Source IDs.....	8-8
Impact on D&B Data.....	8-10
Creating Merge Batches.....	8-11
Merging Parties.....	8-12
Merging Party Sites.....	8-13
Merging Party Relationships.....	8-13
Merging Organization Contacts.....	8-15
Viewing Profile Information.....	8-15
Merging Party Sites of a Party.....	8-16

Processing Merge Batches.....	8-17
Reviewing the Party Merge Log.....	8-18
Identifying Types of Errors.....	8-20
Party and Customer Account Merge.....	8-20

## **9 Customer Merge**

Merging Customers.....	9-1
Tax Validation for Merge.....	9-4
Merging Sites for the Same Customer.....	9-5
Merging Different Customers.....	9-9
Submitting the Merge Process.....	9-15
Customer Merge Execution Report.....	9-17
Reviewing Merged Customers.....	9-17

## **10 Introduction to Oracle Resource Manager**

Overview of the Oracle Resource Manager.....	10-1
Oracle Resource Manager Integrations.....	10-10
Terms and Definitions.....	10-11
Resource Manager Rules for HTML.....	10-14

## **11 Overview of Using Oracle Resource Manager**

Accessing Oracle Resource Manager Interface.....	11-1
Summary of Oracle Resource Manager Tasks.....	11-2

## **12 Managing Employee Resources**

Viewing Resource Information.....	12-1
Defining Your Personal Information.....	12-2
Viewing Your Organizational Structure.....	12-3
Defining Your Skill Rating.....	12-4
Viewing a Resource's Skill Ratings.....	12-7
Making a Resource Web Available.....	12-7

## **13 Managing Group Resources**

Viewing Your Group Membership Information.....	13-1
Defining Your Group Membership Information.....	13-2
Defining Group Hierarchy.....	13-4
Viewing Group Hierarchy.....	13-5
Viewing Your Group Membership History.....	13-5

## **14 Searching for Resources Groups and Teams**

Performing a Simple Search.....	14-1
Performing an Advanced Search.....	14-1

### **A Reports and Processes**

### **B Customizing Trading Community Architecture**

Trading Community Architecture User-Personalizable Pages.....	B-1
---	-----

### **C Customizing Resource Manager**

Resource Manager User-Personalizable Pages.....	C-1
---	-----

### **D Standard Navigation Paths**

Standard Navigation Paths.....	D-1
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## **Index**



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# Send Us Your Comments

## Oracle Trading Community Architecture User Guide, Release 12.2

### Part No. E48950-02

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

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

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

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and [www.oracle.com](http://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 Trading Community Architecture User Guide*.

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

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

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

See Related Information Sources on page xii 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

- 1 Overview
- 2 Bulk Import
- 3 Customer Interface

- 4 Third Party Data Integration**
- 5 Locations and Phones**
- 6 Relationship Manager**
- 7 Batch Duplicate Identification**
- 8 Party Merge**
- 9 Customer Merge**
- 10 Introduction to Oracle Resource Manager**
- 11 Overview of Using Oracle Resource Manager**
- 12 Managing Employee Resources**
- 13 Managing Group Resources**
- 14 Searching for Resources Groups and Teams**
- A Reports and Processes**
- This section lists the reports and processes, including relevant request sets, that are seeded in Standard Request Submission for the Trading Community Manager responsibility.
- B Customizing Trading Community Architecture**
- C Customizing Resource Manager**
- D Standard Navigation Paths**

## Related Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Trading Community Architecture.

## 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 Customer Data Librarian Implementation Guide

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

### Oracle 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 General Ledger Implementation Guide**

This guide provides information on how to implement Oracle General Ledger. Use this guide to understand the implementation steps required for application use, including how to set up Accounting Flexfields, Accounts, and Calendars.

## **Oracle General Ledger User's Guide**

This guide provides you with information on how to use Oracle General Ledger. Use this guide to learn how to create and maintain ledgers, ledger currencies, budgets, and journal entries. This guide also includes information about running financial reports.

## **Oracle HRMS Documentation Set**

This set of guides explains how to define your employees, so you can give them operating unit and job assignments. It also explains how to set up an organization (operating unit). Even if you do not install Oracle HRMS, you can set up employees and organizations using Oracle HRMS windows. Specifically, the following manuals will help you set up employees and operating units:

- **Oracle HRMS Enterprise and Workforce Management Guide**

This user guide explains how to set up and use enterprise modeling, organization management, and cost analysis.

- **Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide**

Use this guide to find out about setting up employees and managing your people resources.

## **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.

## **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.

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## Overview

This chapter covers the following topics:

- Introduction to Oracle Trading Community Architecture
- Oracle Customer Data Management
- Using Oracle Trading Community Architecture

### Introduction to Oracle Trading Community Architecture

Oracle Trading Community Architecture (TCA) is a data model that allows you to manage complex information about the parties, or customers, who belong to your commercial community, including organizations, locations, and the network of hierarchical relationships among them.

This information is maintained in the TCA Registry, which is the single source of trading community information for Oracle E-Business Suite applications. These applications, as well as TCA itself, provide user interfaces, batch data entry functionality, and other features for you to view, create, and update Registry information. See: Using Oracle Trading Community Architecture, page 1-5.

The key entities in TCA include:

- **Parties:** Entities of type Person or Organization that can enter into business relationships. Parties can also be of type Relationship. For example, Joe as himself is a party of type Person, but Joe as a contact for Vision Corporation is a party of type Relationship. Every party in the TCA Registry has a unique Registry ID.

TCA includes an extensive variety of information for parties, for example party name, addresses, contacts, and contact points. Joe as a person can have a personal phone number that differs from the phone number for the relationship of Joe as a contact.

- **Party sites:** Addresses that parties use for specific purposes, or uses.
- **Customers:** Parties with whom you have a selling relationship.

- **Customer accounts:** The business relationships between you and your customers.
- **Customer account sites:** Party sites used in the context of customer accounts for specific purposes, or uses, for example ship-to and bill-to account sites.
- **Locations:** Geospatial points, usually defined by an address.
- **Contacts:** People who have a contact or employment relationship with an organization or person.
- **Contact points:** Means of contact, for example, phone and e-mail address.

TCA also includes conceptual functionality that helps you manage and understand your trading community. For example, you can use relationships to model the roles that parties play with respect to one another, and classifications to classify entities.

## Entities and Attributes Details

Entities in the TCA Registry consist of logical groups of descriptive, related attributes. For example, the Person Profile entity contains attributes, such as last name and date of birth, that describe parties of type Person. Likewise, the Organization Profile entity consists of attributes that describe parties of type Organization, the Address entity has address-related attributes, and so on.

An entity corresponds to one or more tables in TCA. For example, attribute values for a party record are stored in the HZ\_PARTIES table.

## Related Topics

Oracle Customer Data Management, page 1-4

Customers Overview, page 1-2

## Customers Overview

Use the Customers set of pages to manage customer information in Oracle Receivables.

You create customers so that you can properly record and account for sales transactions, as well as all other attributes of your selling relationships. Recording a sales transaction requires that a customer, stored as a party in Oracle Trading Community Architecture, has an account as well as an account site. Consequently, to understand the role of a customer in the context of your trading community, you should also understand other concepts such as party, customer account, and account site.

- **Party:** An entity that can enter into a business relationship, such as buying and selling, and can be of the type Organization or Person. A party exists separately from any business relationship that it enters into with another party. For example,

Vision Distribution could be a party within your trading community.

- **Customer:** A party, either an organization or person, with whom you have a selling relationship. This selling relationship can result from the purchase of products and services or from the negotiation of terms and conditions that provide the basis for future purchases. For example, a division of Vision Distribution could become one of your customers.
- **Customer Account:** A customer account represents the attributes of the business relationship that a party can enter into with another party. The account has information about the terms and conditions of doing business with the party. For example, you could open a commercial account for purchases made by Vision Distribution for its internal use and a reseller account for purchases made by Vision Distribution for sales of your products to end-users.

You can create multiple customer accounts for a party, to maintain information about different categories of business activities. For example, to track invoices for different types of purchases, you can maintain an account for purchasing office supplies and another account for purchasing furniture.

You can also maintain multiple customer accounts for a customer that transacts business with more than one line of business in your organization.

Information about a party such as profile, addresses, and contacts can be shared across a party's customer accounts. In addition, you can also maintain separate profiles and contacts, along with the contacts' contact addresses and contact points, for each customer account.

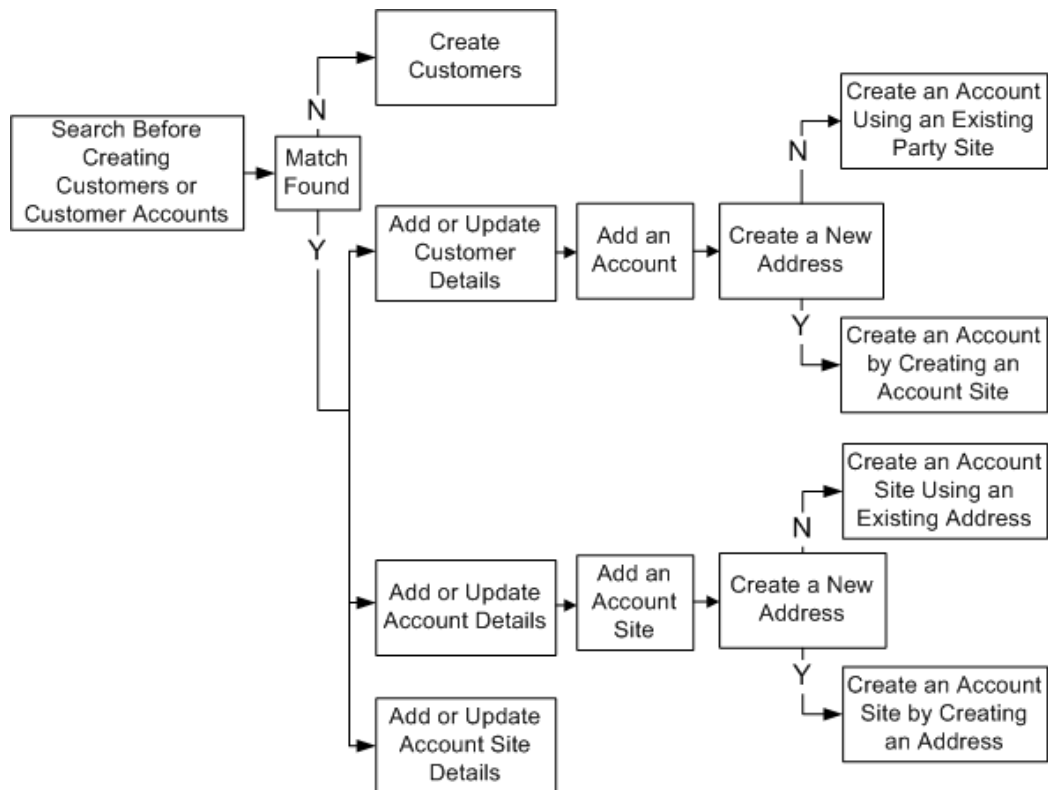
- **Sites/Addresses:**
  - A *location* is a point in space described by an address.
  - A *party site* is the location where a party is physically located. Every party has only one identifying address, but a party can have multiple party sites.
  - An *account site* is a party site that is used in the context of an account. An account can have multiple account sites.
  - A *customer address* is an account site that is used for billing, shipping, or other purposes.
- **Relationship:**
  - A *party relationship* is a party's role in the context of another party. Party relationships can be either seeded or user defined. Examples include, affiliate, subsidiary, partner, employee of, or contact of.
  - An *account relationship* is established between different accounts of a party to allow sharing of billing, shipping, and pricing information.

- **Contact:** A person who communicates for or acts on behalf of a party or customer account. A contact can exist for a customer at the account or address level. A person usually acts as a contact for an organization, but can also be a contact for another person. For example, an administrative assistant could be the contact for an executive.

For a detailed discussion of these Oracle Trading Community Architecture concepts and examples of how to model your customers using the Customers set of pages, see: Oracle Trading Community Best Practices Setting Up Customer and Prospect Data (Note 269124.1 on My Oracle Support).

## Process Flow

This diagram shows the process flow for managing, searching, creating, and updating customer information.



## Oracle Customer Data Management

Oracle Trading Community Architecture is the foundation not only for the Oracle E-Business Suite, but also specifically for the product family that it belongs to: Oracle Customer Data Management (CDM). CDM includes:

- **Oracle Customers Online (OCO):** Oracle Customers Online lets you view, create,

maintain, and enrich your central repository of customer data.

See: *Oracle Customers Online User Guide* and *Oracle Customers Online Implementation Guide*.

- **Oracle Customer Data Librarian (CDL):** Oracle Customer Data Librarian lets you establish and maintain an accurate, duplicate free, and complete customer database. This application includes all of the features from Oracle Customers Online.

See: *Oracle Customer Data Librarian User Guide* and *Oracle Customer Data Librarian Implementation Guide*.

- **Oracle Customer Data Hub (CDH):** Oracle Customer Data Hub lets you centralize customer data from various source systems, providing an single view of your customers. The links between each source system and the Hub are operational and real-time. CDH includes all the TCA features, for example to maintain source systems, and cleanse and enrich data, and also includes Oracle Customers Online.

For reference material that supplements not only TCA but CDM product documentation, see *Oracle Trading Community Architecture Reference Guide*.

## Related Topics

Introduction to Oracle Trading Community Architecture, page 1-1

## Using Oracle Trading Community Architecture

Various applications in the Oracle E-Business Suite can view, create, and update the TCA Registry data. Because this information is shared, any change made in one application is reflected in all applications.

TCA itself provides the Trading Community Manager responsibility, which includes these features that you can use to maintain, enrich, and cleanse the TCA Registry.

- **Bulk Import:** Import batches of party data in bulk from external source systems into the TCA Registry. See: *Bulk Import Overview*, page 2-1.
- **Customer Interface:** Import customer account and party data leveraging row-by-row API's from external source systems into the TCA Registry. See: *Customer Interface*, page 3-1.
- **Customers:** Enter and maintain party and customer account information. See: *Entering and Updating Customer Information*, *Oracle Receivables User Guide* and *Defining Customer Profile Classes*, *Oracle Receivables Implementation Guide*.

Run these reports for customer account information:

- Customer Listing - Detail

- Customer Listing - Summary
- Customer Profiles Report
- Customer Relationships Listing
- Duplicate Customer Report

See: Listing Reports, *Oracle Receivables User Guide*.

- **Third Party Data Integration:** Enrich the data for organizations and persons with D&B information. See: Third Party Data Integration Overview, page 4-1.
- **Locations:** Generate longitude and latitude coordinates for addresses through an eLocations Spatial Data Integration, and generate time zones for locations. See: Locations Overview, page 5-1.
- **Phones:** Generate time zones for phones. See: Generate Time Zone for Phone Numbers, page 5-11.
- **Relationship Manager:** Create and manage relationships among existing parties in the TCA Registry. See: Relationship Manager Overview, page 6-1.
- **Batch duplicate identification:** Create batches of potentially duplicate parties to merge. See: Batch Duplicate Identification Overview, page 7-1.
- **Party Merge:** Cleanse the TCA Registry by merging duplicate parties and duplicate sites within a party. See: Party Merge Overview, page 8-1.
- **Customer Account Merge:** Cleanse the TCA Registry by merging duplicate customer accounts and duplicate sites within an account. See: Merging Customers, page 9-1.

**Note:** If you have Oracle Customer Data Librarian, the data librarian can permanently purge parties from the TCA Registry. See: Party Purge Overview, *Oracle Customer Data Librarian User Guide*.

The Trading Community Manager responsibility also provides features for administering and implementing TCA. See: Introduction to Administration, *Oracle Trading Community Architecture Administration Guide*.

## Related Topics

Introduction to Oracle Trading Community Architecture, page 1-1

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## Bulk Import

This chapter covers the following topics:

- Bulk Import Overview
- Loading Data into the Interface Tables
- Import Batch to TCA Registry
- Resolving Import Errors
- TCA Import Batch Purge

### Bulk Import Overview

Use Oracle Trading Community Architecture (TCA) Bulk Import to load data from legacy or other external systems in bulk into the TCA Registry. TCA provides validations and optional de-duplication to ensure the quality of the imported information.

The import is only for information on the party level. To import both party and account information, use Customer Interface. See: Customer Interface, page 3-1.

**Note:** Customer Interface runs independently and does not regard party information already loaded in the TCA Registry. In particular, if the process does not find an existing account site or account contact point, it creates a new account site or contact point, as well as the associated party site or contact point, even if the party level versions already exist. As a result, if duplicates are created, use Party Merge or Oracle Customer Data Librarian to resolve them. See: Party Merge Overview, page 8-1 or De-Duplication Overview, *Oracle Customer Data Librarian User Guide*.

Your administrator can set up for Bulk Import. See: Setting Up Bulk Import, *Oracle Trading Community Architecture Administration Guide*.

## Bulk Import Process

1. Load data into the interface tables. See: Loading Data into the Interface Tables, page 2-2.
2. Run the Import Batch to TCA Registry program to import a batch into the TCA Registry. See: Import Batch to TCA Registry, page 2-9.
3. Optionally run the Import Batch De-Duplication report to view results of batch de-duplication. See: Import Batch De-Duplication Report, page 2-12.
4. Run the TCA Import Error report to view errors, and reload the corrected data. See: Resolving Errors, page 2-18.
5. Purge data from the interface tables. See: TCA Import Batch Purge, page 2-19.

## Related Topics

Using Oracle Trading Community Architecture, page 1-5

## Loading Data into the Interface Tables

You should have a strong knowledge of the data and data structure to be imported. You can load data through:

- **SQL/ETL Load:** Create scripts or use tools to extract the source information, transform the values to meet the data requirements of the interface tables, and populate the interface tables with large volumes of information. See: Bulk Import Interface Tables, *Oracle Trading Community Architecture Reference Guide*.
- **D&B Load:** Use the standard D&B bulk file that you receive from D&B and run the D&B Import Adapter request set to automatically map and load the D&B information into the interface tables. See: D&B Import Adapter, page 4-26 and Batch Loading, page 4-22.
- **File Load:** Use Oracle Customers Online (OCO) or Oracle Customer Data Librarian (CDL) to load data from a comma-separated value (CSV) file, or file delimited by another allowed character, into the interface tables. See: File Loads Overview, *Oracle Customers Online User Guide*.

## Import Batches

A set of data to be loaded into the TCA Registry at one time is called a batch. The data in one batch must be from the same data source. The interface tables can store as many batches from different sources as needed, and any number of batches can be actively

populating the interface tables at the same time. However, if a D&B import batch is being loaded into the interface tables, using the D&B Import Adapter request set, the tables are locked and all other batches must wait until the D&B batch is completed. The request set uses direct inserts into the interface tables, which requires table-level locks.

**Note:** When the request set is running, you also cannot run the Import Batch to TCA Registry program to transfer any batch from the interface tables into the TCA Registry.

## Batch IDs

Each import batch must have a batch ID. Use the create batch procedure from the Create Import Batch API to guarantee that a unique batch ID is assigned.

Call the following script to create a batch ID:

```
Set serveroutput on;

DECLARE
x_batch_id NUMBER;
x_return_status VARCHAR2(4000);
x_msg_count NUMBER;
x_msg_data VARCHAR2(4000);

BEGIN

hz_imp_batch_summary_v2pub.create_import_batch(NULL, '&batchname', '&batch
description',

'&ORIGSYS', '&loadtype', 12, x_batch_id, x_return_status, x_msg_count, x_msg_d
ata);

dbms_output.put_line(SubStr('x_batch_id = '||TO_CHAR(x_batch_id), 1,
255));
dbms_output.put_line(SubStr('x_return_status =
'||x_return_status, 1, 255));
dbms_output.put_line(SubStr('x_msg_count = '||TO_CHAR(x_msg_count), 1,
255));
dbms_output.put_line(SubStr('x_msg_data = '||x_msg_data, 1, 255));

COMMIT;
EXCEPTION
WHEN OTHERS THEN
    dbms_output.put_line(SubStr('Error '||TO_CHAR(SQLCODE)||':
'||SQLERRM, 1, 255));
RAISE;
END;
```

See: Create Import Batch API, *Oracle Trading Community Architecture Technical Implementation Guide*.

## Unique IDs for Interface Table Records

You must provide a unique ID for each record in the interface table. The unique ID is a

combination of:

- The source system code, defined through Source System Management (SSM) administration, which identifies the source that the imported data comes from
- The source ID, which identifies the record in the source system

In the HZ\_PARTIES, HZ\_PARTY\_SITES, HZ\_CONTACT\_POINTS, and HZ\_ORG\_CONTACTS tables, these unique IDs are treated as source IDs for Source System Management. In other tables that do not support SSM, the ID is treated as a logical key. See: *Source Systems Overview, Oracle Trading Community Architecture Administration Guide*.

These IDs serve to link:

- Details of each party together, as foreign key references among interface tables.
- The data in the source system, now in the interface tables, to the target TCA tables, for making updates to existing parties in the Registry from the same source data. See: *Matching Records with Source System Management*, page 2-14.

You should maintain all unique IDs locally in your system, and use them in the future to update specific information in the TCA Registry.

## Unique Source IDs for Importing Associated Accounts

If you plan to use Customer Interface to import accounts that are associated with the imported parties, you must ensure that the source ID alone is unique across all source systems. Customer Interface uses only source IDs, not source system codes, so the imported account must have a unique source ID to link to the corresponding imported party.

For example, if you are importing a party and do not plan to import associated accounts, you pass for the imported party:

- **Source system code:** MKT
- **Source ID:** 141442

You only need to ensure that this combination is unique across all source systems. If you are importing a party and plan to import associated accounts, then you pass for the imported party:

- **Source system code:** MKT
- **Source ID:** MKT141442

You can concatenate the source system code and source ID values to use as the source ID for the party, or implement your own system to ensure that the source IDs alone are unique across all source systems. When you load the accounts with Customer Interface, you would pass the MKT141442 source ID to associate the accounts with the imported

party. See: Customer Interface, page 3-1.

## Inserts and Updates

Through import, you either insert new records into the Registry or update existing TCA records. An update means that the imported information, if not null, completely overwrites all values in the corresponding TCA record.

- All records inserted into the TCA tables are assumed to be active.
- You can update TCA Registry records of any status through import, but you cannot change the status value itself during import.

The matching phase of the import process determines whether the interface table record is an insert or update. See: Matching Records with Source System Management, page 2-14.

You can use the optional INSERT\_UPDATE\_FLAG column in the interface tables for insert or update protection: *I* for insert and *U* for update. The system matching must align with the action in this column. If not, the record is marked with error and not loaded into TCA. If the column is left blank, the system matching alone decides between insert or update for each record.

If the HZ: Use Data Sharing and Security During Import profile option is set to *Yes*, then the import process invokes Data Sharing and Security (DSS) each time that a TCA record is updated. DSS provides additional security against update and is enabled for these tables involved in import:

- HZ\_CONTACT\_POINTS
- HZ\_CODE\_ASSIGNMENTS
- HZ\_PARTIES
- HZ\_PARTY\_SITES
- HZ\_RELATIONSHIPS

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

If the HZ: Validate Flexfields During Import profile option is set to *Yes*, then flexfield validation also applies to inserts and updates for these tables:

- HZ\_CONTACT\_POINTS
- HZ\_LOCATIONS
- HZ\_PARTIES

- HZ\_RELATIONSHIPS

## Null Values for Update

When a record in the interface table is designated to update an existing record upon import, any null values in that record would not update the TCA value. The existing value in TCA remains the same after import. You are not required to pass values in all interface table columns when values are optional and not available from a given source system.

If you want to intentionally overwrite a TCA value with NULL, you must pass a specific value, as defined in these profile options:

- HZ: Character Value to Indicate NULL During Import
- HZ: Date Value to Indicate NULL During Import
- HZ: Numeric Value to Indicate NULL During Import

For example, the HZ: Date Value to Indicate NULL During Import profile option is set to *01-01-4000*, and a record in the TCA Registry currently has an end date of *02-02-2005*. If you want to update the date with a null value, then you must pass *01-01-4000* for that column.

## Party and Party Site Numbers

The PARTY\_NUMBER and PARTY\_SITE\_NUMBER columns in the TCA tables must contain unique values.

If values for these columns are passed in the interface tables, the import process checks for the uniqueness during the import.

- If unique, the values are accepted.
- If not unique, the record fails with a unique index error.

If no values for these columns are passed, the import process generates values from an internal sequence.

- If the sequence numbers are unique, the values are accepted.
- If not unique, the record fails with a unique index error.

You should maintain one of these strategies:

- Always pass values for these columns so that the import process does not have to generate sequence numbers.
- Never pass values for these columns so that the generated sequence numbers

would not conflict with existing values in the Registry.

## Primary Flags

Primary flags indicate which record is the primary one when multiple records exist. For example, if a party has multiple bill-to addresses, the main bill-to address is marked as primary.

Primary flags are exposed in these interface tables, which correspond to TCA tables that contain primary flags:

- HZ\_IMP\_ADDRESSES\_INT
- HZ\_IMP\_ADDRESSUSES\_INT
- HZ\_IMP\_CLASSIFICS\_INT
- HZ\_IMP\_CONTACTPTS\_INT

If a new party is inserted through import, you can define primary flags for any of the above child entities.

If an existing party in the Registry do not have any contact points and is being updated with one or more contact points, you can mark one of the imported contact points as primary. If you do not specify any of the new records as primary, the import process marks one at random. If you mark more than one record as primary, the import process will pick one of the marked records at random.

If the party already has an existing address, contact point, address use, or classification, then you cannot change the primary status through import. Even if you pass a value in the PRIMARY\_FLAG column of the interface table, the value is ignored. You can only change primary statuses through a user interface or APIs.

## Related Topics

Interface Tables, page 2-7

Bulk Import Overview, page 2-1

## Interface Tables

This table shows the interface tables and the TCA tables that the data would be imported into. The interface tables do not include any columns that have been made obsolete in TCA.

Entity	Interface Table	TCA Table
Addresses	HZ_IMP_ADDRESSES_INT	HZ_LOCATIONS HZ_PARTY_SITES
Address Uses	HZ_IMP_ADDRESSUSES_INT	HZ_PARTY_SITE_USES
Classifications	HZ_IMP_CLASSIFICS_INT	HZ_CODE_ASSIGNMENTS
Credit Ratings	HZ_IMP_CREDITRTNGS_INT	HZ_CREDIT_RATINGS
Contact Points	HZ_IMP_CONTACTPTS_INT	HZ_CONTACT_POINTS
Financial Numbers	HZ_IMP_FINNUMBERS_INT	HZ_FINANCIAL_NUMBERS
Financial Reports	HZ_IMP_FINREPORTS_INT	HZ_FINANCIAL_REPORTS
Parties	HZ_IMP_PARTIES_INT	HZ_PARTIES HZ_PERSON_PROFILES HZ_ORGANIZATION_PROFILES
Relationships	HZ_IMP_RELSHIPS_INT	HZ_RELATIONSHIPS HZ_ORG_CONTACTS (optional) HZ_PARTIES
Contacts	HZ_IMP_CONTACTS_INT	HZ_RELATIONSHIPS HZ_ORG_CONTACTS HZ_PARTIES
Contact Roles	HZ_IMP_CONTACTROLES_INT	HZ_ORG_CONTACT_ROLES

See: Bulk Import Interface Tables, *Oracle Trading Community Architecture Reference Guide*.

## Interface Table Parent and Child Relationships

The parent and child relationships among the import interface tables are:

- HZ\_IMP\_PARTIES\_INT is the parent of all interface tables.
- HZ\_IMP\_FINREPORTS\_INT is the parent of HZ\_IMP\_FINNUMBERS\_INT.
- HZ\_IMP\_ADDRESSES\_INT is the parent of HZ\_IMP\_ADDRESSUSES\_INT.
- HZ\_IMP\_CONTACTS\_INT is the parent of HZ\_IMP\_CONTACTROLES\_INT, and potentially HZ\_IMP\_ADDRESSES\_INT and HZ\_IMP\_CONTACTPTS\_INT because addresses and contact points can be defined at the contact level.

If a child entity record has an error, the parent entity record can still be imported if it has no errors. If a parent entity record has errors, however, all related child entity records will also fail.

## Related Topics

Loading Data into the Interface Tables, page 2-2

## Import Batch to TCA Registry

Use the Import Batch to TCA Registry program to import a batch from the interface tables into the TCA Registry. The program provides optional preimport processes you can perform on the data before the actual import into TCA:

- **Batch de-duplication:** Identify and resolve duplicates within the batch that you are importing from the interface tables.

**Note:** The Import Batch to TCA Registry program identifies only duplicates with respect to the batch that you are importing. You cannot check for duplicates between batches in the interface tables.

You can run the Import Batch De-Duplication report to view results. See Import Batch De-Duplication Report, page 2-12.

- **Address validation:** See: Import Address Validation, page 2-14.
- **Registry de-duplication:** Identify duplicates between the interface tables and the Registry.

**Tip:** You should purge data from the interface tables after the corresponding batch has been loaded to TCA, to reduce the overall size of the interface tables and improve performance for subsequent batch

loads. See: TCA Import Batch Purge, page 2-19.

## Prerequisites

- The data you want to import must be loaded into the interface tables. See: Loading Data into the Interface Tables, page 2-2.
- Optionally check that the D&B Import Adapter request set is not currently running. If it is and you submit the Import Batch to TCA Registry program, the program will be pending until the request set is complete. See: Import Batches, page 2-2.
- If you are running the Import Batch to TCA Registry program for an import batch that was not loaded into the interface tables using File Load in Oracle Customers Online or Oracle Customer Data Librarian, optionally check that another non-File Load batch is not currently being loaded into the TCA Registry. If it is, and you submit the program for a non-File Load batch, the program will be pending until the process for the other batch is complete. See: File Loads Overview, *Oracle Customers Online User Guide*.

## Program Parameters

Use the following parameters to submit the Import Batch to TCA Registry program.

### Batch ID

Enter the batch to import.

### Import Run Option

Specify whether to run both preimport and import processes, or only the preimport processes.

If you plan to run batch de-duplication, you can run only preimport processes and then run the Import Batch De-Duplication report to preview batch de-duplication results.

### Run Batch De-Duplication

Specify whether you want to run de-duplication on the batch or not.

### Batch De-Duplication Match Rule

If you select to run batch de-duplication, you must enter the match rule to use. Only match rules of type Bulk Duplicate Identification are used for batch de-duplication.

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

attributes.

### Action to Take on Duplicates

Specify how to resolve duplicates found with batch de-duplication. The specified action would be taken on the batch before the data is imported into the TCA Registry.

### Run Address Validation

Specify whether you want to run address validation on the batch or not.

### Run Registry De-Duplication

Specify whether or not you want to run de-duplication between the batch and the TCA Registry.

### Registry De-Duplication Match Rule

If you select to run Registry de-duplication, you must enter the match rule to use. Only match rules of type Bulk Duplicate Identification are used for Registry de-duplication. You can select the same match rule as for batch de-duplication.

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

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

- Match threshold, but not the automatic merge threshold, are included in System Duplicate Identification (SDI) batches for merge consideration in Oracle Customer Data Librarian.
- Automatic merge threshold are automatically merged after the import.

If the match rule is not enabled for Automerger, then all potential duplicates that reach or exceed the match threshold are included in SDI batches.

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

### Generate Fuzzy Key During Post Processing

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

**Important:** Skipping fuzzy key generation helps optimize performance,

but select *No* only if you do not use Oracle E-Business Suite applications that use fuzzy keys.

See: Postimport Processes, page 2-17.

## Related Topics

Import Process, page 2-12

Bulk Import Overview, page 2-1

## Import Batch De-Duplication Report

If you run batch de-duplication as part of the Import Batch to TCA Registry program, you can run the Import Batch De-Duplication report:

- After the preimport processes and before the actual import, to preview the de-duplication results.
- After the import, to view the actual de-duplication results.

The report shows the duplicates that were identified and resolved within the batch that you are importing from the interface tables. This de-duplication does not resolve duplicates between the batch and the TCA Registry itself.

## Report Parameter

### Batch ID

Enter the batch that was imported with batch de-duplication.

## Related Topics

Import Batch to TCA Registry, page 2-9

## Import Process

When the Import Batch to TCA Registry program is submitted, this process follows:

1. The batch de-duplication and address validation runs, if selected.

Duplicates found through batch de-duplication are resolved as you specified in the Action to Take on Duplicates parameter, for example, to keep the records that are last updated.

If you chose to run preimport processes only so that you can preview preimport results, then address validation includes all records. If not, then address validation includes only records that batch de-duplication determines as not duplicates.

2. The data in the interface tables are matched against source system mappings to determine if imported records are inserted as new parties or to update existing parties. See: *Matching Records with Source System Management*, page 2-14.
3. For performance reasons, the records are populated into staging tables for processing before loading into the TCA tables.
4. If you have selected the optional Registry de-duplication, then duplicates are identified between the batch that you are importing and the TCA Registry. All parties are to be inserted as new parties, but then the duplicates are resolved as described in step 7.
5. After any selected preimport processes finish, depending on your choice, either:
  - The actual import into TCA starts immediately.
  - You start the actual import by rerunning the program, after you optionally:
    - Review preimport process statistics from the program output.
    - Run the Import Batch De-Duplication report for this import batch, if batch de-duplication was run. The report output provides a preview of the de-duplication results.
6. Mandatory validations are performed on all data, and records that pass all validations are loaded into the TCA Registry. Records that fail are marked with error and not imported. See: *Import Validations*, page 2-16.
7. If Registry de-duplication was run, then:
  - System Duplicate Identification batches are created with potential duplicates for merge consideration in Oracle Customer Data Librarian. See: *System Duplicate Identification, Oracle Customer Data Librarian User Guide*.
  - Duplicates are automatically merged through Automerger, if applicable. See: *Automerger, Oracle Trading Community Architecture Administration Guide*.
  - Records that are not duplicates are inserted as new parties.
8. Postimport processes automatically run. See: *Postimport Processes*, page 2-17.
9. If you ran batch de-duplication, optionally run the Import Batch De-Duplication report for this batch. The report output provides the de-duplication results.

## Related Topics

Import Batch to TCA Registry, page 2-9

## Import Address Validation

If you choose to validate the addresses in the interface tables before importing them into the TCA Registry, the addresses are validated using address validation adapters. An adapter connects TCA to an external source of information, which provides the validation service.

Each address is validated through the default adapter set up for each country. For example, if the Vision adapter is the default for Thailand, then all Thai addresses in the interface tables are validated against Vision's standard addresses.

If an address from the interface tables differs from the validated address, it is updated with the validated address only if it is valid above the threshold defined for the adapter. Such an update is called an address correction. For example, if the adapter configuration has the threshold at the municipality level, an address in the interface tables is corrected if at least its city or town is valid.

**Note:** Aside from the validation threshold, address correction only occurs if the update does not violate other validations, such as tax validation rules.

After the addresses are validated and corrected in the interface tables, they are ready for import into the TCA Registry.

## Related Topics

[Import Batch to TCA Registry, page 2-9](#)

## Matching Records with Source System Management

When the import into the TCA tables starts, the matching phase of the import process automatically begins to identify if each record in the interface table has an associated record in the TCA Registry. The matching determines whether an imported record is inserted as a new party or updates an existing party in the TCA Registry.

The unique ID of each record in the interface table is compared against the Source System Management (SSM) mappings. See: [Unique IDs for Interface Table Records, page 2-3](#).

A SSM mapping links a TCA record to the original record from an external source. SSM mappings are enabled for these tables:

- HZ\_PARTIES
- HZ\_PARTY\_SITES
- HZ\_CONTACT\_POINTS

- HZ\_ORG\_CONTACTS

See: Source Systems Overview, *Oracle Trading Community Architecture Administration Guide*.

The unique ID indicates the source ID and source system of the interface table record. If that unique ID matches a SSM mapping, the interface table record will be used to update the corresponding existing record in TCA. If no match is found, the interface table record will be inserted into the TCA Registry as a new party.

For example, you import a record from the Vision source system, with source ID 100, for the first time. This record is inserted as a new party in TCA, and a SSM mapping is created between this TCA party and the source ID 100 from Vision. If you try to reimport the record from Vision with source ID 100, that record would be matched to the existing SSM mapping, and the reimported data would update the existing TCA party.

**Note:** Each combination of source ID and source system can update only one party in the TCA Registry.

You can choose to load only entities without the associated party, as long as the provided source ID and source system matches a parent record in the TCA Registry to be updated. For example, you can import addresses without parties, if the addresses are matched to existing parties. Otherwise, you must import associated parties along with addresses.

You cannot change the source ID of a record in the TCA Registry during the import process unless you are importing data from D&B.

## Matching Addresses

If an address's source ID in the interface tables matches an existing SSM address mapping, then the interface table address is compared to the existing address.

- If the addresses are exactly the same, the existing address will be updated with the imported address.
- If not the same, the value passed in the CORRECT\_MOVE\_INDICATOR column of the HZ\_IMP\_ADDRESSES\_INT table determines if the address should be a correction or move. The default is move.
  - **Correction:** The HZ: Allow Updates of Address Records During Import profile option must be set to *Yes*. The imported address will update the existing address. If the country, state, province, county, city, or postal code changes due to the update, the tax assignment is deleted.

If the profile option is set to *No*, you will get an error. You should either change the profile option or the CORRECT\_MOVE\_INDICATOR column value.

- **Move:** A new location is created with the imported address, and the existing address is inactivated. Any SSM mappings to the existing address will be changed to the new address, but none of the transactions are automatically transferred.

## Related Topics

Import Batch to TCA Registry, page 2-9

## Import Validations

Before import from the interface tables into the TCA Registry, a record must pass import validations. All elements of an interface table record must succeed, or the entire record is considered with error.

Records that fail validations are marked, and all errors for one record are captured after the entire record is validated. After validation, only successful records are imported into the Registry.

The types of validations include:

- Lookups. For example, the HZ\_ORG\_CONTACTS.DEPARTMENT\_CODE value should be from the DEPARTMENT\_TYPE lookup. If the HZ: Allow Import of Records with Disabled Lookups profile option is set to *Yes*, then values that reference disabled lookups are still valid.
- Foreign keys. For example, HZ\_LOCATIONS.COUNTRY should have a foreign key to FND\_TERRITORIES.TERRITORY\_CODE.
- Requirements, if a value is mandatory or conditionally required. For example, HZ\_CONTACT\_POINTS.CONTACT\_POINT\_TYPE is mandatory.
- Cross-column dependencies. For example, *EDI* as the value for HZ\_CONTACT\_POINTS.COMMUNICATION\_TYPE is allowed only if the value for HZ\_CONTACT\_POINTS.OWNER\_TABLE\_ID is a party ID of an organization.
- TCA columns that are not updateable. Values that are entered for such columns are ignored without error.
- Flags that should have *Y*, *N*, or *NULL* as values.
- Flexfields. If the HZ: Validate Flexfields During Import profile option is set to *Yes*, then flexfields are validated based on the flexfield setups.

These tables have flexfields:

- HZ\_CONTACT\_POINTS

- HZ\_LOCATIONS
- HZ\_PARTIES
- HZ\_RELATIONSHIPS
- Address sharing. Multiple parties cannot share a single address. If the same address applies to two parties, you must enter the address for each party.
- Business rules.

The parent and child relationships of entities also affect whether a record succeeds or fails validation. See: *Interface Table Parent and Child Relationships*, page 2-9.

## Related Topics

Bulk Import Interface Tables, *Oracle Trading Community Architecture Reference Guide*

Import Batch to TCA Registry, page 2-9

## Postimport Processes

After data is loaded into the TCA Registry, the TCA Import Postprocessing program automatically runs and kicks off various postimport processes. Even before some of these processes finish, imported data can already be viewed and used in the Oracle E-Business Suite.

- Person name information is reformatted to be properly displayed based on context, location, and language.
- Fuzzy keys are generated for customer and address information, if selected in the Generate Fuzzy Key During Post Processing parameter. See: *Program Parameters*, page 2-10.
- Phone numbers imported in a raw format are split into the appropriate segments, for example area code, prefix, and so on.
- Phone numbers that include letters are converted into numbers.
- Certain relationship information is denormalized into the HZ\_PARTIES table to improve performance for certain Oracle E-Business Suite applications.
- The D&B hierarchy is created from D&B data that has been entered in a flat format.
- A time zone description is applied to each address and phone number that has been imported or updated during import.
- Tax assignment is calculated and regenerated, if address elements used to

determine tax assignments are updated as a result of the import.

If the TCA Import Postprocessing program results in error, you can resubmit it from Standard Request Submission.

### Program Parameters

Use these parameters to resubmit the TCA Import Postprocessing program for a previous run that resulted in error.

#### **p\_request\_id**

Enter the request ID of the Import Batch to TCA Registry submission that the failed postprocessing was originally run for.

#### **p\_num\_of\_worker**

Enter the number of workers to run the program. The recommended number is four, and the maximum number is ten.

### Related Topics

Import Batch to TCA Registry, page 2-9

## Resolving Import Errors

Records with errors are marked with *E* in the INTERFACE\_STATUS column of the interface table and associated with detail records in the import errors table, HZ\_IMP\_ERRORS. Use the TCA Import Error report to view the error details for a specific import batch.

### To resolve errors:

1. Run the TCA Import Error report, specifying the batch that was imported.
2. Go to the report output to see import errors for the batch.
3. Correct the data directly in the interface tables.
4. Change the INTERFACE\_STATUS column value to *C* for each corrected record.
5. Run the Import Batch to TCA Registry program again for the same batch. Only records with an INTERFACE\_STATUS column value of *C* is processed.

## Resolving Postimport Errors

If the TCA Import Postprocessing program results in error, review the log of the program from Standard Request Submission. After you fix the errors, you can resubmit

the TCA Import Postprocessing program. See: Postimport Processes, page 2-17.

## **Related Topics**

Bulk Import Overview, page 2-1

## **TCA Import Batch Purge**

Use the TCA Import Batch Purge program to purge batches from the import interface tables, as well as internal tables such as staging and error tables. You permanently remove all records in the batch from all these tables.

You should purge batches after a satisfactory number of records are successfully imported into the TCA Registry from that batch.

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

## **Program Parameters**

Use the following parameter to submit the TCA Import Batch Purge program.

### **Batch Identifier**

Enter the batch ID of the batch that you want to purge.

## **Related Topics**

Bulk Import Overview, page 2-1



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## Customer Interface

This chapter covers the following topics:

- Customer Interface
- Preparing for Import
- Interface Data Required to Run Customer Interface
- System Tables Updated by Customer Interface
- A Sample Customer Import
- Creating Unique Customer References
- Importing Customers Using Customer Interface
- Customer Interface Transfer Report

### Customer Interface

Use Customer Interface to import current or historical customer information from other systems into your database. Once customer information is imported, you can use Customer Interface to import additional data for that customer (such as additional contacts or addresses) and to update existing information. You can also manually update and enter new information using the Customers set of pages.

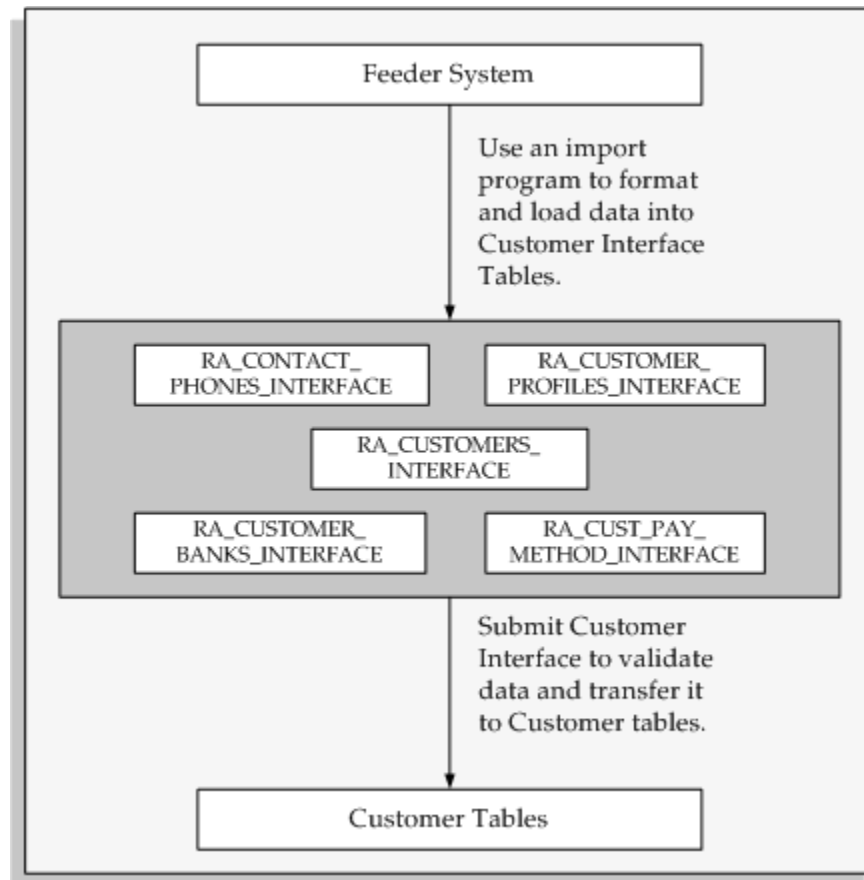
**Important:** You can use Customer Interface to import both party and account information, including accounts that are associated with parties already loaded into your database. However, customer Interface runs independently and does not regard party level information already loaded into your database using Bulk Import. If you plan to use Customer Interface to import accounts that are associated with parties that have already been imported using Bulk Import, you must ensure that the source ID alone is unique across all source systems in the bulk import process. While Bulk Import requires source IDs to be unique

only within an identified source system, customer interface does not recognize the source system and therefore requires that the source ID is unique across all sources systems. See:

- Bulk Import Overview, page 2-1.
- Loading Data into the Interface Tables, page 2-2.
- Unique Source IDs for Importing Associated Accounts, page 2-4.

The following diagram shows how customer information is imported into the customer tables.

**Customer Interface Process**



This illustration demonstrates that an import program is used to format and load data from a feeder system into the Customer Interface tables. The Customer Interface tables are:

- RA\_CONTACT\_PHONES\_INTERFACE

- RA\_CUSTOMER\_PROFILES\_INTERFACE
- RA\_CUSTOMER\_INTERFACE
- RA\_CUSTOMER\_BANKS\_INTERFACE
- RA\_CUST\_PAY\_METHOD\_INTERFACE

You then run the Customer Interface program to validate your imported data and transfer the data to the Customer tables within your system.

## Customer Interface Validation Rules

The Customer Interface program validates the data you load in the Customer Interface tables by ensuring that the columns in the interface tables reference the appropriate values and columns in the rest of your system. The interface supports the same data relationship for customer information as the Customers set of pages. See: Customers Overview, page 1-2.

Customer Interface will not create location combinations for foreign locations. The system considers a customer's address to be foreign if the country segment is not the same as the Default Country you defined in the System Options window. See: Defining Receivables System Options, *Oracle Receivables Implementation Guide*.

If you are trying to perform updates, Customer Interface ensures that the record to be updated already exists within your system. If the record does not exist in your system, or it only exists in a Customer Interface table in the Insert mode, the program displays an error.

Additionally, Customer Interface ensures that certain column values are consistent with each other. For example, if a profile class is not assigned to a customer, the interface program ensures that interest charge, collector, discount terms, and other profile class information is defined in the appropriate columns.

Customer Interface also ensures that records marked for insertion are unique.

## Import Program

An import program is a custom program that you write which converts data from your feeder system into a standard data format that Customer Interface can read. The data can then be transferred into the Customer Interface tables. Once the import data is loaded into the interface tables, you can run Customer Interface to validate the data and convert it into customer information.

The type of feeder program you write depends on the environment from which you are importing data. For example, you can use SQL\*Loader, SQL\*Report, PL/SQL, or C to write an import program to import data from a non-Oracle system. You can also write a conversion program to import historical data from your original customer database. Regardless of the type of import program you write, the output should be in a standard

data format that Customer Interface can use to import the information into the system.

## Inserting and Updating Customer Information

When importing data into the interface tables, the column `INSERT_UPDATE_FLAG` indicates whether you are inserting new or updating existing information. This column is required in `RA_CUSTOMERS_INTERFACE`, `RA_CONTACT_PHONES_INTERFACE`, and `RA_CUSTOMER_PROFILES_INTERFACE`. Set this flag to `I` only if you are importing customer information into the interface tables and Customer tables for the first time (for example, when you initially import data from a legacy system). Set this flag to `U` if the customer already exists in the Customer tables and you want to update specific information.

When updating existing information, the data you import into the interface tables must contain information in each of the required columns, regardless of whether you want to update that information. For example, to modify a customer's name you must specify a value for the `CUSTOMER_NAME` column and all of the other required columns in `RA_CUSTOMERS_INTERFACE`, such as `CUSTOMER_NUMBER`, `CUSTOMER_STATUS`, and `LAST_UPDATED_BY`.

When you import a party, the `HZ: Generate Party Number` and `HZ: Generate Party Site Number` profile options determine whether you must import corresponding party numbers and party site numbers. If you set the `HZ: Generate Party Number` and `HZ: Generate Party Site Number` profile options to *No*, you must populate the `PARTY_NUMBER` and `PARTY_SITE_NUMBER` columns in the interface table. If you set these profile options to *Yes*, the system automatically generates party and party site numbers, and you cannot populate the interface table with these numbers.

If you do not populate the `ORIG_SYSTEM_PARTY_REF` column with an original system reference number for a party, the system assigns the imported customer reference number from the `ORIG_SYSTEM_CUSTOMER_REF` column to the party as well as to the customer account. During the import process, you must provide the existing party's original system reference number when you create a new customer account for an existing party.

If the `INSERT_UPDATE_FLAG` is not set correctly or a required column is missing a value, Customer Interface rejects the entire customer record, not just the attribute(s) you want to update.

**Tip:** Before you load data into the interface tables, create a copy of your import file. Then, if you want to update customer attributes later, you can set the insert update flag to `U` in your import file, modify only the values you want to update, and then reimport the data. This eliminates the need to recreate a new import file each time you want to update existing information.

**Note:** You cannot use Customer Interface to update information in the SITE\_USE\_ATTRIBUTE1-15 columns. These columns are used for descriptive flexfield information, and Customer Interface performs no validation on them.

## Related Topics

Preparing for Import, page 3-5

Interface Data Required to Run Customer Interface, page 3-6

System Tables Updated by Customer Interface, page 3-11

A Sample Customer Import, page 3-13

Importing Customers Using Customer Interface, page 3-18

Customer Interface Transfer Report, page 3-20

Using the Customer Interface Program, *Oracle Financials for the Americas User Guide*

## Preparing for Import

To ensure that Customer Interface runs smoothly, you need to prepare your system for any new data that you require Customer Interface to import. This data can include the following:

- AutoCash Rule Sets
- AutoInvoice Grouping Rules
- Collectors
- Customer Addresses

**Note:** If you use a tax service provider, such as Taxware or Vertex, to calculate taxes on US sales transactions, do the following before running Customer Interface:

1. Upload US geography hierarchy by running the US Sales and Use Tax Import Program. See: *Oracle E-Business Tax: Vertex Q-Series and Taxware Sales/Use Tax System Implementation Guide*.
2. Ensure your address validation is setup correctly for the United States; with an appropriate tax usage and address validation level set to 'Error'. See: *Geography Hierarchy Overview, Oracle Trading Community Architecture Administration Guide*.

- Customer Bank Information
- Customer Exemptions
- Customer Profile Classes
- Demand Classes
- Freight Carriers
- Receipt Methods
- Payment Terms
- Lookups
  - Countries
  - Site Use Codes
  - Credit ratings
  - Risk Codes
  - Account Statuses
  - Communication Types
  - Customer Classes
- Statement Cycles
- Tax Codes

## Related Topics

Interface Data Required to Run Customer Interface, page 3-6

System Tables Updated by Customer Interface, page 3-11

A Sample Customer Import, page 3-13

Overview of Setting Up, *Oracle Receivables Implementation Guide*

## Interface Data Required to Run Customer Interface

This section lists the required columns for each Customer Interface table. For example, to enter a new contact for a previously entered customer, you must enter values for ORIG\_SYSTEM\_CUSTOMER\_REF, ORIG\_SYSTEM\_CONTACT\_REF,

INSERT\_UPDATE\_FLAG and CONTACT\_LAST\_NAME.

You can use Customer Interface to import other pieces of information not listed in this section by populating additional "optional" columns. For example, you can optionally populate the LANGUAGE column for a customer site.

For a list of the validation for both required and optional columns and to see a list of optional columns, see: Customer Interface Table Descriptions and Validation, *Oracle Trading Community Architecture Reference Guide*.

## RA\_CUSTOMERS\_INTERFACE

To import a customer, address, or business purpose, populate the following mandatory columns of RA\_CUSTOMERS\_INTERFACE:

- ORG\_ID
- ORIG\_SYSTEM\_CUSTOMER\_REF
- INSERT\_UPDATE\_FLAG
- CUSTOMER\_NAME
- CUSTOMER\_NUMBER (if you are *not* using Automatic Customer Numbering)
- CUSTOMER\_STATUS
- LAST\_UPDATED\_BY
- LAST\_UPDATE\_DATE
- CREATED\_BY
- CREATION\_DATE
- If you are importing an individual person, set the PERSON\_FLAG to Y and populate the PERSON\_FIRST\_NAME column. PERSON\_LAST\_NAME is optional.

If you are importing an address and a business purpose, you must also populate the following columns:

- PRIMARY\_SITE\_USE\_FLAG (if you are inserting an address)
- LOCATION (if you are *not* using Automatic Site Numbering)
- SITE\_USE\_CODE (if you are inserting an address)
- ADDRESS1

The system requires that you separate your city, state, and postal codes, whereas your

current system may not. To save time, separate these components in your current system before importing customers.

- ORIG\_SYSTEM\_ADDRESS\_REF

You must enter values for the columns you reference in your Tax Location Flexfield if you are calculating sales tax and your Address Validation option is set to 'Error.' (You define this option in the System Options window, Tax tabbed region.)

- COUNTRY

## **RA\_CUSTOMER\_PROFILES\_INTERFACE**

A customer level profile must exist in RA\_CUSTOMER\_PROFILES\_INTERFACE for new customers.

- ORG\_ID
- ORIG\_SYSTEM\_CUSTOMER\_REF
- INSERT\_UPDATE\_FLAG
- CUSTOMER\_PROFILE\_CLASS\_NAME

If you did not pass a value in this column, you must enter values in the following columns:

- COLLECTOR\_NAME
- CREDIT\_BALANCE\_STATEMENTS
- CREDIT\_CHECKING
- AUTO\_REC\_INCL\_DISPUTED\_FLAG
- DISCOUNT\_TERMS
- DUNNING\_LETTERS
- INTEREST\_CHARGES (if 'Y,' you must also enter values in INTEREST\_PERIOD\_DAYS and CHARGE\_ON\_FINANCE\_CHARGE\_FLAG)
- STATEMENTS (if 'Y,' you must also enter a value in STATEMENT\_CYCLE\_NAME)
- TOLERANCE
- OVERRIDE\_TERMS

- CREDIT\_HOLD
- LAST\_UPDATED\_BY
- LAST\_UPDATE\_DATE
- CREATED\_BY
- CREATION\_DATE
- AUTOMATCH\_SET\_NAME

If you are entering a profile for a customer address, you must also enter a bill-to, dunning, or statements site in ORIG\_SYSTEM\_ADDRESS\_REF.

If you populate the ORIG\_SYSTEM\_ADDRESS\_REF column, the corresponding address, either a new one in the RA\_CUSTOMERS\_INTERFACE table or an existing address, must have an active bill-to, dunning, or statements business purpose. These business purposes can be either existing ones or new purposes that you are importing. If you do not populate the ORIG\_SYSTEM\_ADDRESS\_REF column, those business purposes are created without any profile attached.

## RA\_CONTACT\_PHONES\_INTERFACE

To import telephone numbers for customers, addresses, and contacts, populate the following mandatory columns of RA\_CONTACT\_PHONES\_INTERFACE:

- ORG\_ID
- ORIG\_SYSTEM\_CUSTOMER\_REF
- ORIG\_SYSTEM\_TELEPHONE\_REF
- INSERT\_UPDATE\_FLAG
- CONTACT\_POINT\_TYPE

Depending on the contact point type, you must enter values in the following columns:

- EMAIL\_ADDRESS, if contact point type is EMAIL (e-mail).
- TELEPHONE, if contact point type is TLX (telex).
- TELEPHONE and TELEPHONE\_TYPE, if contact point type is PHONE (telephone).
- LAST\_UPDATED\_BY

- LAST\_UPDATE\_DATE
- CREATED\_BY
- CREATION\_DATE

If you are entering a telephone number for an address, you must also enter a value in ORIG\_SYSTEM\_ADDRESS\_REF.

If you are entering a telephone number for a contact, you must also enter a value in ORIG\_SYSTEM\_CONTACT\_REF and CONTACT\_LAST\_NAME.

## **RA\_CUSTOMER\_BANKS\_INTERFACE**

To import banks for customers and bill-to business purposes, populate the following mandatory columns of RA\_BANKS\_INTERFACE:

- ORG\_ID
- ORIG\_SYSTEM\_CUSTOMER\_REF
- PRIMARY\_FLAG
- START\_DATE
- LAST\_UPDATED\_BY
- LAST\_UPDATE\_DATE
- CREATED\_BY
- CREATION\_DATE
- BANK\_ACCOUNT\_NAME
- BANK\_ACCOUNT\_CURRENCY\_CODE
- BANK\_ACCOUNT\_NUM
- BANK\_BRANCH\_NAME
- BANK\_HOME\_COUNTRY

If you are entering a bank for a customer address, you must also enter a bill-to site in ORIG\_SYSTEM\_ADDRESS\_REF.

## **RA\_CUST\_PAY\_METHOD\_INTERFACE**

To import payment methods for customers and bill-to business purposes, populate the

following mandatory columns of RA\_CUST\_PAY\_METHOD\_INTERFACE:

- ORG\_ID
- ORIG\_SYSTEM\_CUSTOMER\_REF
- PAYMENT\_METHOD\_NAME
- PRIMARY\_FLAG
- START\_DATE
- LAST\_UPDATED\_BY
- LAST\_UPDATE\_DATE
- CREATED\_BY
- CREATION\_DATE

If you are entering a payment method for a customer address, you must also enter a bill-to site in ORIG\_SYSTEM\_ADDRESS\_REF.

## Related Topics

System Tables Updated by Customer Interface, page 3-11

A Sample Customer Import, page 3-13

Creating Unique Customer References, page 3-17

Importing Customers Using Customer Interface, page 3-18

## System Tables Updated by Customer Interface

Customer Interface transfers customer data from the interface tables into the following tables:

- HZ\_CONTACT\_POINTS
- HZ\_CUST\_ACCT\_RELATE\_ALL
- HZ\_CUST\_ACCT\_ROLES
- HZ\_CUST\_ACCT\_SITES\_ALL
- HZ\_CUST\_ACCOUNTS
- HZ\_CUST\_PROFILE\_AMTS

- RA\_CUST\_RECEIPT\_METHODS
- HZ\_CUST\_SITE\_USES\_ALL
- HZ\_CUSTOMER\_PROFILES
- HZ\_LOCATIONS
- HZ\_ORG\_CONTACTS
- HZ\_PARTIES
- HZ\_PARTY\_SITES
- HZ\_PERSON\_PROFILES
- AP\_BANK\_ACCOUNT\_USES
- AP\_BANK\_ACCOUNTS
- AP\_BANK\_BRANCHES

The Customer Interface program will not allow updates to the following tables:

- HZ\_CUST\_ACCT\_RELATE\_ALL
- HZ\_CUST\_SITE\_USES\_ALL
- RA\_CUST\_RECEIPT\_METHODS
- AP\_BANK\_ACCOUNT\_USES
- AP\_BANK\_ACCOUNTS
- AP\_BANK\_BRANCHES

**Note:** The customer and address information descriptive flexfields are updated according to the data provided in the Interface table. If the data provided in the Interface table is Null, then data in the corresponding flexfield is cleared as well.

**Caution:** The Customer Interface Transfer Report will not display errors for records attempting to update these tables; the records will simply not be processed.

## Related Topics

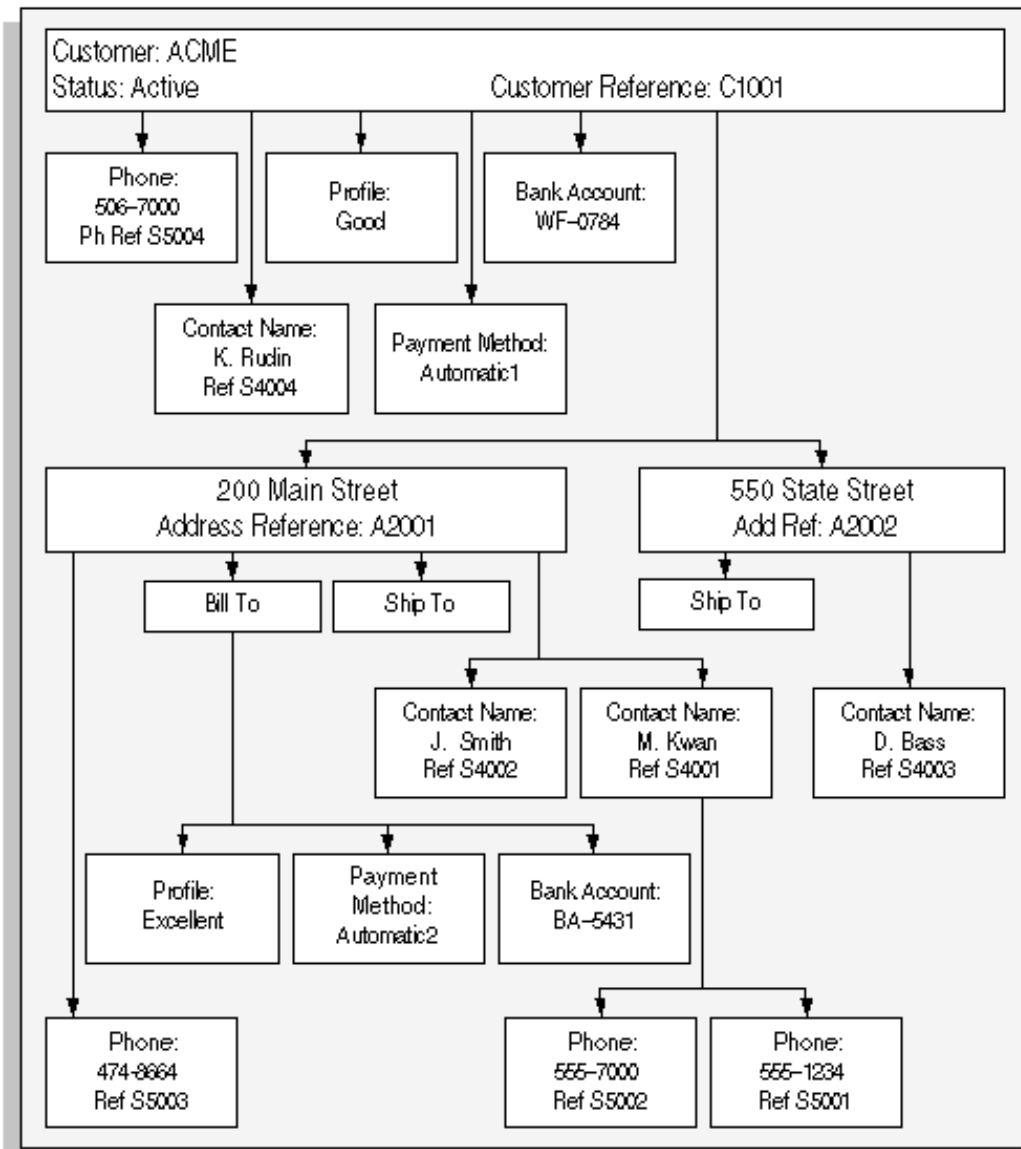
Interface Data Required to Run Customer Interface, page 3-6

Customer Interface Table Descriptions and Validation, *Oracle Trading Community Architecture Reference Guide*

## A Sample Customer Import

The following diagram shows a customer with several addresses, customer profiles, contacts, telephone numbers, business purposes, bank accounts, and payment methods. Compare this diagram to the data examples that follow to see how you would prepare your interface to successfully import this information.

### Sample Customer Import



This illustration shows the following information:

- The ACME customer with an active status, and the customer reference number of C1001. The phone number is 506-7000 with the phone reference number of S5004. The profile class is good, the bank account number is WF-0784, and the payment method is automatic1. The contact name is K. Rudin and the contact reference number is S4004.
- The first address is 200 Main Street and the address reference is A2001. This address is both a bill to and ship to address. The phone number is 506-7000. The profile for

this address is excellent, the payment method is automatic2, and the bank account number is BA-5431. The first contact name is J. Smith and the reference number is S4002. The second contact name is M. Kwan and the reference number is S4001. The first phone number for M. Kwan is 555-7000 and the reference number is S5002. The second phone number for M. Kwan is 555-1234 and the reference number is S5001.

- The second address is 550 State Street and the address reference is A2002. This address is a ship to address. The contact name is D. Bass and the reference number is S4003.

To import the customer illustrated in the previous diagram, your import program should load the Customer Interface tables as follows:

This table illustrates how your import program should load the RA\_CUSTOMERS\_INTERFACE table:

Customer Reference	Name	Address Reference	Address	Site Code
C1001	ACME	A2001	200 Main	BILL_TO
C1001	ACME	A2001	200 Main	SHIP_TO
C1001	ACME	A2002	550 State	SHIP_TO

**Tip:** You must separate your city, state, and postal codes, whereas the system you are importing from may not. To save time, separate these components in that system before importing customers.

This table illustrates how your import program should load the RA\_CUSTOMER\_PROFILES\_INTERFACE table:

Customer Reference	Address Reference	Profile Name
C1001		Good
C1001	A2001 (This address reference refers to the bill-to site)	Excellent

This table illustrates how your import program should load the RA\_CONTACT\_PHONES\_INTERFACE table:

Customer Reference	Address Reference	Contact Reference	Last Name	Phone Reference	Phone Number
C1001	A2001	S4001	KWAN	S5001	555-1234
C1001	A2001	S4001	KWAN	S5002	555-7000
C1001	A2001	S4002	SMITH		
C1001	A2001			S5003	474-8664
C1001	A2002	S4003	BASS		
C1001		S4004	RUDIN		
C1001				S5004	506-7000

This table illustrates how your import program should load the RA\_CUSTOMER\_BANKS\_INTERFACE table:

Customer Reference	Address Reference	Bank Account
C1001		WF-0784
C1001	A2001 (This address reference refers to the bill-to site)	BA-5431

This table illustrates how your import program should load the RA\_CUST\_PAY\_METHOD\_INTERFACE table:

Customer Reference	Address Reference	Bank Account
C1001		Automatic1
C1001	A2001 (This address reference refers to the bill-to site)	Automatic2

## Related Topics

Customer Interface, page 3-1

## Creating Unique Customer References

Each attribute of a customer must be unique. For example, each contact for a customer or for a customer address must have a unique identifier. Following are some tips on how to create unique identifiers for imported customer information.

### To select useful original system reference values:

Choose a value that you can easily derive from your original customer database. For example, if your original customer database has a 4 digit customer ID, a 6 digit address ID, a 5 digit contact ID, and a 7 digit telephone ID, you could create the following standard format for these values:

**ORIG\_SYSTEM\_CUSTOMER\_REF**

CUST0001

**ORIG\_SYSTEM\_ADDRESS\_REF**

CUST0001-ADDR000001

**ORIG\_SYSTEM\_CONTACT\_REF**

CUST0001-ADDR000001-CONT00001

**ORIG\_SYSTEM\_TELEPHONE\_REF**

CUST0001-ADDR000001-CONT00001-TELE0000001

**Tip:** If the value you enter is numeric, add an alpha character to the end to ensure that this number never conflicts with a system-generated ID number.

### To import a customer with multiple addresses:

Enter multiple records into RA\_CUSTOMERS\_INTERFACE\_ALL with identical ORIG\_SYSTEM\_CUSTOMER\_REF values, but different ORIG\_SYSTEM\_ADDRESS\_REF values.

### To import a customer with multiple contacts:

Enter multiple records into RA\_CONTACT\_PHONES\_INT\_ALL with identical ORIG\_SYSTEM\_CUSTOMER\_REF values, but different ORIG\_SYSTEM\_CONTACT\_REF values.

**To import a customer with multiple telephone numbers:**

Enter multiple records into RA\_CONTACT\_PHONES\_INT\_ALL with identical ORIG\_SYSTEM\_CUSTOMER\_REF values, but different ORIG\_SYSTEM\_TELEPHONE\_REF values.

**To import an address with multiple business purposes:**

Enter multiple records into RA\_CUSTOMERS\_INTERFACE\_ALL with identical ORIG\_SYSTEM\_CUSTOMER\_REF and ORIG\_SYSTEM\_ADDRESS\_REF values, but different SITE\_USE\_CODES values.

**To import an address with multiple contacts:**

Enter multiple records into RA\_CONTACT\_PHONES\_INT\_ALL with identical ORIG\_SYSTEM\_CUSTOMER\_REF and ORIG\_SYSTEM\_ADDRESS\_REF values, but different ORIG\_SYSTEM\_CONTACT\_REF values.

**To import an address with multiple telephone numbers:**

Enter multiple records into RA\_CONTACT\_PHONES\_INT\_ALL with identical ORIG\_SYSTEM\_CUSTOMER\_REF and ORIG\_SYSTEM\_ADDRESS\_REF values, but different ORIG\_SYSTEM\_TELEPHONE\_REF values.

**To import a contact with multiple telephone numbers:**

Enter multiple records into RA\_CONTACT\_PHONES\_INT\_ALL with identical ORIG\_SYSTEM\_CUSTOMER\_REF and ORIG\_SYSTEM\_CONTACT\_REF values, but different ORIG\_SYSTEM\_TELEPHONE\_REF values.

**Related Topics**

Importing Customers, page 3-18

A Sample Customer Import, page 3-13

**Importing Customers Using Customer Interface**

Use the Customer Interface program to import and validate customer information from the interface tables into the Customer tables.

The interface tables receive data from an import program which converts data from your source system into a standard format that Customer Interface can read. For each record that passes validation, Customer Interface imports new or updates existing customer information in your system. See: Customer Interface, page 3-1.

You must write an import program that is compatible with the environment from which you want to import your data. For example, you can use SQL\*Loader, SQL\*Report, PL/SQL, or C to write an import program to import data from an external system. You can also write a conversion program to import historical data from your original customer database.

**Important:** Customer Interface does *not* import territory flexfield information.

## Prerequisites

- Review the validation rules for each column of the Customer Interface tables. See: Customer Interface Validation Rules, page 3-3.
- Perform all required set up steps preceding customer entry to ensure that values exist in your system for the columns of the Customer Interface tables that require predefined values. See: Overview of Setting Up, *Oracle Receivables Implementation Guide*.
- Write an import program to transfer customer information from an external system.
- Validate customer addresses (if you are using US Sales Tax). See: Preparing for Import, page 3-5.

## To import customers and customer related information using the Customer Interface program:

1. Run your import program to load the Customer Interface tables.

**Caution:** When loading the interface tables, you should remove all trailing spaces from the import data. Otherwise, if you attempt to load two records with the same customer name, but one of the records has trailing spaces, Customer Interface will treat each record as unique. If you are using SQL\*loader to load the interface tables, you can easily remove all trailing spaces from the import data.

For more information, refer to the documentation that corresponds to your version of Oracle Server.

2. Use the Standard Request Submission windows or the Request Submission page to run the Customer Interface program. See: Running Reports and Programs, *Oracle E-Business Suite User's Guide*.

**Important:** Enter *Yes* or *No* in the Create Reciprocal Customer Accounts parameter to indicate if you want to create reciprocal customers or not. The default is *No*.

**Tip:** If you are importing a large number of customers, use the Customer Interface Master concurrent program to invoke parallel workers that process data at the same time. Before you run this program, define the number of workers to use in the HZ: Number of Workers Used by Customer Interface profile option.

**Tip:** You can specify the operating unit for which you want the Customer Interface program to validate and import customer information.

In case you do not select an operating unit, the Customer Interface program validates and imports customer information for all the operating units in your access list.

3. To view the status of your request, navigate to the Find Requests window or View Requests page and click View Details.
4. When the report phase is Complete, you can view the output by selecting View Output. See: Customer Interface Transfer Report, page 3-20.

## Related Topics

Interface Data Required to Run Customer Interface, page 3-6

A Sample Customer Import, page 3-13

Customers Overview, page 1-2

Monitoring Requests, *Oracle E-Business Suite User's Guide*

## Customer Interface Transfer Report

The application generates the Customer Interface Transfer report each time you run Customer Interface. This report lists the number of records imported into each table and records specific error messages describing any problems. If a record in the interface tables has several problems, the Customer Interface Transfer report displays multiple error messages to help you fix all of the problems in one step. You can then interface the records successfully the next time you run Customer Interface.

You may need to make changes in either your feeder program or your system to resolve the errors. For example, if you receive an error message explaining that the payment

term that you specified for an address does not exist in your system, then you can either enter this term in the Payment Terms window, or modify your feeder program to import only existing payment terms.

The Customer Interface Transfer Report has 3 main sections:

- Header Section
- Summary of Transfer Section
- Exception Records Section

The **Header** section displays the date and the time that Customer Interface began processing your transactions. The date is displayed in the format DD-MM-YY, while the time is displayed in the 24-hour format (e.g. 2:30 PM displays as 14:30). The header section also displays the concurrent request ID used by the Concurrent Manager and the user ID of the person who submitted the Concurrent Request.

The **Summary of Transfer** section displays a count of the customer information processed for each of the tables updated by the interface program. See: System Tables Updated by Customer Interface, page 3-11.

The **Exception Records** section displays detailed error messages about each record in the interface tables that was not successfully processed. This section also displays the original system reference columns from the interface tables to help you identify and correct exception records.

## Related Topics

A Sample Customer Import, page 3-13

Importing Customers Using Customer Interface, page 3-18

Address Validation, *Oracle Receivables Implementation Guide*



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## Third Party Data Integration

This chapter covers the following topics:

- Third Party Data Integration Overview
- Introduction to D&B
- Source System Management Impact
- Mapping of D&B Data Elements
- Details on Creating Parties with D&B Information
- Online Purchasing
- Batch Loading
- Loading Rationalized Legacy Data
- Viewing Information from Data Sources
- Duplicate DUNS Report
- DNB Global Data Products Request Report

### Third Party Data Integration Overview

Use Oracle Trading Community Architecture (TCA) Third Party Data Integration to purchase third party data from D&B to enrich the data in the TCA Registry. D&B information is integrated with the party records to maintain accurate information that you can use to evaluate credit risks.

The D&B information coexists with user-entered data in the Registry. In Oracle applications, users can view and use information from different data sources, such as user entered and D&B. Your administrator can control how the D&B and user-entered data are used and displayed in Oracle applications, as well as set up Third Party Data Integration.

**Important:** The embedded Dun and Bradstreet toolkit is not compatible

in an IBM environment.

**Note:** Even though all purchased D&B data are stored in TCA tables, some information might not appear in user interfaces, based on the Single Source of Truth (SST) setup.

See: Setting Up Third Party Data Integration, *Oracle Trading Community Architecture Administration Guide* and Single Source of Truth Overview, *Oracle Trading Community Architecture Administration Guide*.

In the TCA Registry, a party exists separately from any business relationship that it enters into with other parties. A customer account for a party represents a business relationship that parties can enter into. The account has information about the terms and conditions of doing business with the party. The D&B information that you purchase is stored in TCA for parties, not for customer accounts. See: Customers Overview, page 1-2.

## Purchasing D&B Data

D&B provides profile, demographic, credit risk, and financial information about parties to help you make business decisions about the parties that you transact with.

To acquire third party information from D&B, you can use either of these methods:

- Online purchasing for a single party, page 4-10.
- Batch loading for multiple parties, page 4-22.

You can also load legacy data that D&B has rationalized into the TCA Registry, page 4-28 .

## Viewing Information from Data Sources

For specific parties, view and compare the data from different data sources, such as user entered and D&B. See: Viewing Information from Data Sources, page 4-29.

You can also run two reports for more information about the D&B data in the TCA Registry:

- **Duplicate DUNS Report:** To review parties with the same D-U-N-S Number. See: Duplicate DUNS Report, page 4-31.
- **DNB Global Data Products Request Report:** To determine what D&B data products have been requested. See: DNB Global Data Products Request Report, page 4-32.

## Related Topics

- Introduction to D&B, page 4-3
- Source System Management Impact, page 4-7
- Mapping of D&B Data Elements, page 4-9
- Details on Creating Parties with D&B Information, page 4-10
- Using Oracle Trading Community Architecture, page 1-5

## Introduction to D&B

Dun & Bradstreet (D&B) maintains a growing global database of more than 70 million businesses worldwide. This database provides key information such as D&B's unique identifier, the D-U-N-S Number, and executive contacts, as well as demographic, financial, and credit risk data. D&B provides information in the form of data products and Business Information Reports that contain a variety of data elements.

## D&B Contact Information

If you have a D&B relationship manager assigned to your company, you should contact that individual for any D&B issues or information, for example, to interpret credit ratings and other information that D&B provides.

If you do not have a relationship manager, contact D&B's Global Service Center at (888) 243-4566, e-mail [dnb4oracle@dnb.com](mailto:dnb4oracle@dnb.com), or visit <http://www.dnb.com>.

## Related Topics

- Data Products, page 4-3
- Business Information Report (BIR), page 4-6
- Third Party Data Integration Overview, page 4-1

## Data Products

D&B data products meet the needs of businesses that transact business worldwide. Each data product provides different sets of information called data elements to meet your business decision-making criteria. The data products contain information such as:

- Business identity
- Number of employees
- Years in operation

- Industry
- Corporate structure
- Financial history
- Proprietary D&B scores and ratings that indicate credit risk

You can use Third Party Data Integration to obtain any of these data products:

- Business Verification
- Quick Check
- Delinquency Score
- Global Failure Risk Score
- Financial Standing
- Decision Support
- Enterprise Management
- Commercial Credit Score
- Vendor Management

### **Business Verification**

The Business Verification Global Data Product (GDP) provides the information necessary to verify a company's existence and validate its location with background information such as primary name, address, phone, SIC codes, branch indicator, and D&B D-U-N-S Number.

### **Quick Check**

The Quick Check GDP provides information that you use to perform low-risk credit assessments with D&B's core credit evaluation information. You can prescreen prospective customer accounts, evaluate a party's creditworthiness, and develop appropriate credit terms. In addition to the information in the Business Verification GDP, Quick Check includes financial event indicators, basic financial data, number of employees, payment activity summary, and the D&B Rating.

### **Delinquency Score**

The Delinquency Score GDP contains a statistically modeled D&B score that indicates the risk of a company to make delinquent payments, based on payment history information from the D&B file. The higher the Delinquency Score, the lower the

probability of payment delinquency. D&B's Delinquency Score lets you rank the customer accounts in your credit portfolio from highest to lowest risk of payment delinquency. You can also quickly divide new and existing accounts into various risk segments to determine appropriate marketing or credit policies. Most of the information included in the Quick Check GDP is also in the Delinquency Score GDP.

### **Global Failure Risk Score**

The Global Failure Risk Score GDP contains a statistically derived predictive score that helps you assess the risk of business failure when dealing with global companies and managing the customer accounts in your global credit portfolios. The Global Failure Risk Score is a single, uniform measure predicting the risk of business failure over a 12-month period. This data product is ideal for companies that have centralized credit processes and policies or those with decentralized credit processing that plan to globally or regionally standardize decision making. The Global Failure Risk Score GDP contains the information included in the Delinquency Score GDP and other financial data.

### **Financial Standing**

The Financial Standing GDP provides key financial information such as sales volume, net worth, assets, and liabilities to help you assess a party's financial condition. You can determine the financial strength of a business to set credit terms and conditions, perform research, or determine the strengths and weaknesses of a prospective customer account, existing customer account, or supplier. Key income statement and balance sheet information are provided, as well as information included in the Global Failure Risk Score GDP.

### **Decision Support**

The Decision Support GDP provides information that you use with a decision support system or manual credit evaluation processes. You can improve the timeliness and consistency of credit decisions by matching your company's credit policies and requirements to D&B credit scores and ratings, as well as the party's financial information. This data product helps you set credit terms and conditions for medium-to high-risk value decisions, prioritize collection efforts, evaluate potential merger and acquisition candidates, and introduce rapid, accurate, and consistent credit decision making. The Decision Support GDP contains the data included in the Financial Standing GDP, as well as additional scores and ratings information.

### **Enterprise Management**

The Enterprise Management GDP provides detailed demographic, corporate structure, risk, and financial information. You can use this information to improve risk assessment procedures, make better informed credit decisions, and improve the acquisition and retention of customer accounts. Enterprise Management includes the most complete set of data, scores, and ratings available about the party.

You can view the corporate structure that this GDP provides in a hierarchical display. The hierarchical relationships within the structure make up the D&B hierarchy, which you can access using Relationship Manager. See: D&B Hierarchy, page 6-13.

### **Commercial Credit Score (USA) Data Product**

The Commercial Credit Score data product includes the Commercial Credit Score and other data elements that you can use to predict the likelihood that a company would pay invoices in a severely delinquent manner within the next 12 months. D&B defines severe delinquency as the receipt of payment more than 90 days past the due date. This data product also includes information about bankruptcies, delinquent payments, and payment history.

**Note:** This data product is only available to D&B customers in the US for businesses located in the US.

### **Vendor Management**

The Vendor Management data product provides detailed business information to help you evaluate a supplier and ensure the stability and efficiency of your supply chain. Information includes headquarters location, parent company, risk indicators, payment information and risk scores.

### **Related Topics**

Data Elements, page 4-7

Introduction to D&B, page 4-3

### **Business Information Report (BIR)**

The Business Information Report (BIR) provides many of the data elements from the D&B database in a standard report format. You can order a BIR, store the report in your database, and view the report whenever necessary.

The BIR usually includes:

- D&B rating
- General information such as number of employees, business history, and so on
- Financial statements
- Payment performance information, such as the D&B PAYDEX score

### **Related Topics**

Data Elements, page 4-7

## Data Elements

The complete D&B database includes over 150 key business data elements. Each data product consists of a fixed set of data elements. These data elements provide information that you can use to identify, contact, and evaluate the credit risk of parties.

A few of the available data elements are:

- **D-U-N-S Number:** Unique business identification number assigned by D&B to each commercial entity in the D&B database. If an organization has multiple locations, each location has a unique D-U-N-S Number.

**Note:** If DNB is not the highest ranking source or a user overwrite rule exists for the D-U-N-S number, the D-U-N-S number from the Single Source of Truth (SST) record as well as the hz\_parties record might be different from D-U-N-S number from DNB.

- **D&B Rating:** Rating that indicates a company's creditworthiness. The rating usually consists of a financial strength code and a risk indicator.

**Note:** For a key to the D&B Ratings, contact your local D&B representative or D&B's Global Service Center at (888) 243-4566, or visit Customer Service at <http://www.dnb.com>.

- **Local Business ID:** The primary business identification number assigned to the business by a government agency, chamber of commerce, or association.
- **Parent Bankruptcy Chapter Conversion:** Indicator of whether the parent of the business has converted its bankruptcy filing from one chapter to another; for example, from Chapter 11 to Chapter 7. This data element is only available as part of the Commercial Credit Score data product.

## Related Topics

General Data Elements, *Oracle Trading Community Architecture Reference Guide*

Financial Data Elements, *Oracle Trading Community Architecture Reference Guide*

Introduction to D&B, page 4-3

## Source System Management Impact

Source System Management (SSM) maps records in the TCA Registry with the source system that the data comes from. See: Source Systems Overview, *Oracle Trading*

For D&B, the D-U-N-S Number is used as the source ID, which identifies the record in the source system. Each record from D&B with a unique D-U-N-S Number can map to only one party record in the TCA Registry. Likewise, if multiple parties in the Registry has the same D-U-N-S Number, only one of those records can be mapped to D&B. The party that is actively mapped to D&B has what is called the mapped D-U-N-S Number.

**Important:** When you repurchase D&B data through batch load, and several parties have the same D-U-N-S Number, only the party with the mapped D-U-N-S Number is updated.

For both online purchase and batch load, when you acquire D&B data with a D-U-N-S Number that does not yet exist in TCA, the party is automatically mapped to D&B. For example, you get D&B data for Vision Corporation for the first time, including the D-U-N-S Number for Vision. If that D-U-N-S Number is not already mapped, then Vision Corporation is created as a new party, with the mapped D-U-N-S Number.

If you repurchase D&B information for Vision Corporation, and D&B provides a different D-U-N-S Number, then Vision gets a new, mapped D-U-N-S Number.

You can also later acquire D&B information with the same D-U-N-S Number for another party, but only one of the two parties can have the mapped D-U-N-S Number. The mapping would automatically switch to the party that you are working with. For example:

- You are acquiring D&B information for Vision Corporation for the first time, and you get D-U-N-S Number A for Vision. Another party, however, already has that D-U-N-S Number and is mapped to D&B. The existing mapping would be inactivated, and Vision would get the mapped D-U-N-S Number.
- You are acquiring D&B information to update Vision, which currently has D-U-N-S Number A. D&B provides D-U-N-S Number B to update Vision, but another party already has D-U-N-S Number B and is mapped to D&B. Again, the mapping for D-U-N-S Number B would go to Vision.

D-U-N-S Number A is no longer a mapped D-U-N-S Number, until you purchase D&B data with D-U-N-S Number A for a party.

**Tip:** Multiple parties with the same D-U-N-S Number are allowed to support different company situations. You should use the shared D-U-N-S Number to identify and merge duplicates, since only the record with the mapped D-U-N-S Number is updated through batch load.

## Related Topics

Third Party Data Integration Overview, page 4-1

## Mapping of D&B Data Elements

When you purchase D&B data online or batch load D&B information, certain D&B data elements are mapped to the appropriate columns in the TCA Registry. Most of the columns have the same names as the D&B data elements, but other columns have more general names that differ from those used by D&B.

- **Online purchasing:** The Mapping API utility maps and loads the D&B data elements from the HZ\_PARTY\_INTERFACE table into the TCA Registry. See: Mapping API Utility, page 4-16.
- **Batch loading:** The D&B Import Adapter request set maps and loads the D&B data elements to the appropriate import interface table columns. The mapped data is then ready for import into the Registry. See: D&B Import Adapter, page 4-26.

## D-U-N-S Number is the Same as the Related D-U-N-S Number

If the party is the headquarters, the HQ D-U-N-S Number is the same as the D-U-N-S Number for the party. This case also applies to related parties. If the D-U-N-S Number of the related party is the same as the party D-U-N-S Number, two possible scenarios arise:

- If the party is a Domestic Ultimate, Global Ultimate, or Headquarters, a relationship is created between the party and its related party. Both of the companies in the relationship will be the same, to convey that the party itself is of type Domestic Ultimate, Global Ultimate, or Headquarters.
- If the related party does not have a parent, D&B does not provide parent information.

## D-U-N-S Number and Enquiry D-U-N-S Number

Outside of North America, D&B does not store information at the branch level. If you request information for a company that is a branch location outside of North America, D&B provides data for its headquarters. The D-U-N-S Number for the branch's headquarters is used to select the D&B data for the headquarters. The D-U-N-S Number for the branch is displayed as the Enquiry D-U-N-S Number. If a headquarters record does not exist in the TCA Registry, Third Party Data Integration automatically creates one.

## Related Topics

Third Party Data Integration Overview, page 4-1

## Details on Creating Parties with D&B Information

When you purchase online or batch load D&B information for a party that does not yet exist in the TCA Registry, you create a new party and load its D&B data. For this party, both a D&B and a user-entered record are created in the following table:

- HZ\_ORGANIZATION\_PROFILES

However, user entered records are not created in the following tables:

- HZ\_LOCATIONS
- HZ\_PARTY\_SITES

## Related Topics

Third Party Data Integration Overview, page 4-1

## Online Purchasing

Use the online purchasing functionality of Third Party Data Integration to search for and purchase Dun & Bradstreet (D&B) information on specific companies from D&B's database. You can update the information obtained from D&B during online sessions or by using the batch loading process.

You can purchase and retrieve D&B information for organizations that exist or do not exist in the TCA Registry. When you obtain D&B information about a company that does not exist in the TCA Registry, a new party is created using the D&B data. See: Details on Creating Parties with D&B Information, page 4-10.

## Related Topics

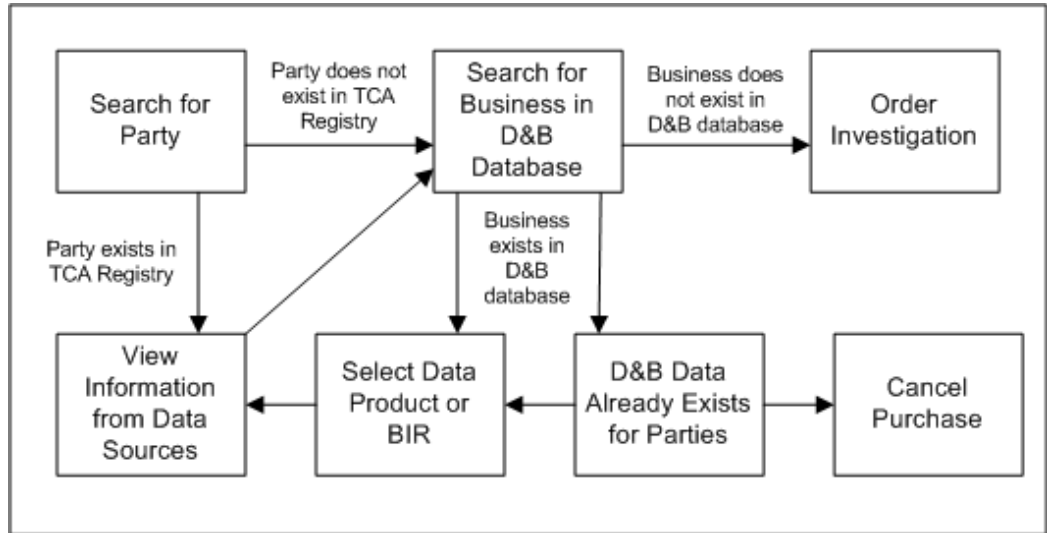
Third Party Data Integration Overview, page 4-1

Mapping API Utility, page 4-16

Load D&B Data, page 4-22

## Process Overview

This diagram describes the process flow for purchasing D&B information online. You can correct errors that might occur in this process. See: Correcting Mapping API Utility Errors, page 4-17.



### To purchase D&B information online:

1. Search for an existing party in the TCA Registry, page 4-12.
2. If the party exists, you view the information it currently has from data sources, if any, page 4-29. You can search the D&B database for that company if you want to initially purchase or update D&B information for the selected party.  
  
If the party does not exist, you can search the D&B database to create a new party with purchased D&B information.
3. Search for the company in the D&B database, page 4-12.
4. If the company exists in the D&B database:
  - You can continue and select the data product or Business Information Report (BIR) to purchase.
  - And if the D&B information for the selected company is already purchased for at least one existing party, you can either:
    - Continue purchase by selecting a data product or BIR for your selected or new party, page 4-13.
    - Cancel the purchase.

If the company does not exist in the D&B database, you can request a D&B investigation for a party, page 4-15.
5. After the purchase process completes, view the updated or purchased D&B information for your party, page 4-29. If you purchased D&B information for a

party that did not exist in the TCA Registry, a new party is created with that D&B information.

## Searching for Existing Parties in the TCA Registry

You search for a party in the TCA Registry to:

- Find the party that you want to purchase D&B information for.
- Confirm that a party does not already exist before purchasing D&B information to create a new party.
- View its existing third party and user-entered information.

**Tip:** With the advanced search criteria, you can search for only parties with active mapped D-U-N-S Numbers. This criterion is available only if D-U-N-S Numbers exist in the Registry. See: Source System Management Impact, page 4-7.

If your search criteria do not match any existing party in the TCA Registry, or the specific party that you are searching for is not displayed, you can create a new party with the purchased D&B data. See: Searching for Companies in the D&B Database, page 4-12.

If your search criteria match the party you are searching for, click the party name to view its third party and user-entered data, if any, and to optionally continue with purchasing D&B data. See: Viewing Information from Data Sources, page 4-29.

In other Oracle applications, accordingly search for the party or customer. For example, in Customers Online, you search for an organization as usual and, from the overview and other pages for that organization, you can proceed to view existing information from data sources and purchase D&B data.

## Related Topics

Online Purchasing, page 4-10

## Searching for Companies in the D&B Database

Search the D&B database to determine if D&B's database contains information about your party. You can search for either a party that you want to create using D&B information or for an existing party that you want to purchase or update D&B information for.

**Note:** If you search by unique identifiers, you do not need to enter required values for searching by company name and location, but you

must enter at least one identifier.

If you are purchasing data for an existing party that has no D&B information, the identifying address is used as the default address search criterion. If the party already has D&B information, then the address that D&B provided is the default.

**Note:** The most commonly used and effective search criterion is the D-U-N-S Number. Second is the local business ID, which can be assigned by a governmental agency or a nongovernmental organization.

From the search results, you can:

- Request a D&B investigation for the party, page 4-15.
- Select the company to purchase information for, and then the data product or BIR, page 4-13.

### D&B Information Already Exists for a Party

If you are trying to purchase D&B information, and D&B data for the selected company is already purchased for at least one other existing party, you can either:

- Continue to purchase the D&B data for the party that you are creating or updating. See: Selecting Data Products or BIRs, page 4-13.

**Note:** Possible duplicate parties might exist in the TCA Registry if the same D&B information applies to more than one party. You should consider merging parties that are actually duplicates.

- Cancel the purchase.

### Related Topics

Online Purchasing, page 4-10

### Selecting Data Products or BIRs

After you find the party in the D&B database that you want to purchase information for, you select one of the available data products or Business Information Reports (BIR) to purchase. See: Data Products, page 4-3 and Business Information Report (BIR), page 4-6.

**Tip:** For a new or existing party that has no existing D&B data, you

might initially want to gather basic information about a company in the form of a BIR.

The following table shows which data product provides information to the subtabs where you can view D&B information. See: Viewing Information from Data Sources, page 4-29.

Subtab	Data Product
Summary	All
Business Verification	All
Special Event	<ul style="list-style-type: none"><li>• Commercial Credit Score</li><li>• Decision Support</li><li>• Enterprise Management</li><li>• Financial Standing</li><li>• Quick Check</li></ul>
Relationships	Enterprise Management
BIR	Business Information Report (BIR)
Credit and Risk	<ul style="list-style-type: none"><li>• Commercial Credit Score</li><li>• Decision Support</li><li>• Delinquency Score</li><li>• Enterprise Management</li><li>• Financial Standing</li><li>• Global Failure Risk Score</li><li>• Quick Check</li></ul>

Subtab	Data Product
Financial Analysis	<ul style="list-style-type: none"> <li>• Decision Support</li> <li>• Enterprise Management</li> <li>• Financial Standing</li> <li>• Quick Check</li> </ul>

After the D&B data is purchased, you can review the D&B information. See: Viewing Information from Data Sources, page 4-29.

## Related Topics

Online Purchasing, page 4-10

## Requesting D&B Investigations

Request an investigation for a company that you cannot find in the D&B database. Because of the time required to conduct an investigation, you cannot use D&B data to create a new party at the same time that you request an investigation from D&B.

Information about the party defaults into this page to identify the party that you want to investigate. If the party does not exist in the TCA Registry, the criteria entered for the D&B database search provide the default identifying information. See: Searching for Companies in the D&B Database, page 4-12.

## Instructions Section

- **Email To:** The address that D&B uses to send an acknowledgement of your request and to notify you when the investigation has been completed. A separate e-mail provides you with a BIR containing the information that D&B gathered about your party.

The e-mail address defaults with the one that your system administrator entered in your user definition, if any.

See: *Oracle E-Business Suite Security Guide*..

- **Service:** The level of priority for your investigation request.

In the US, a Regular investigation is usually carried out by D&B within five business days. A Priority investigation is completed the next business day but incurs a premium price from D&B.

- **Additional Information:** More details to identify your party or other instructions to D&B.

## Related Topics

Online Purchasing, page 4-10

## Mapping API Utility

When you purchase D&B information online, the information is first loaded into the HZ\_PARTY\_INTERFACE table. The Mapping API utility takes the data from the interface table, and maps and loads them into the TCA Registry. See: Mapping of D&B Data Elements, page 4-9.

The utility processes party data in two phases:

1. Data for the party is processed.

The utility retrieves records one by one for the parties from the interface table and then processes them. Online requests for information cause the processing of only one record.

New records in the interface table are identified with a STATUS data element value of *N*. When the utility successfully processes a record, the utility changes the STATUS value for the record to *P1*. If D&B does not have any information about a business, the utility changes the party's D-U-N-S Number to *000000000* and the STATUS value to *B* for blank.

If the utility cannot successfully process the record, it changes the STATUS value to *E1*, to indicate that an error occurred. In some cases, the utility can automatically correct invalid values from D&B, and it changes the STATUS value for the corrected record to *W1*. See: Automatic Correction of Invalid D&B Values, page 4-17.

2. Information for related parties associated with the party is processed. Related parties, such as the Parent, Headquarters, Domestic Ultimate, and Global Ultimate locate the party within an organization's hierarchy.

When you request D&B data for more than one party, the utility must process all of the party records in the first step before processing data for the organizations associated with each party. Only if a party record was successfully processed in the first step can the utility process data for the organizations associated with that party.

When the utility successfully processes the organization data associated with a party, it changes the STATUS value for the record to *P2*. If the utility cannot successfully process the data, it changes the STATUS value to *E2* to indicate that an error occurred. In some cases, the utility can automatically correct invalid values from D&B, and it changes the STATUS value for the corrected record to *W2*. See: Automatic Correction of Invalid D&B Values, page 4-17.

## Correcting Mapping API Utility Errors

The received data from online purchase is loaded into the HZ\_PARTY\_INTERFACE table as one record. The record is automatically assigned a unique ID in the GROUP\_ID column. If there are no errors, the data automatically transfers into the appropriate TCA tables for you to view and use.

In some cases, you need to manually transfer the data. If errors arise with the online purchase, the data remains in the interface table. For example, D&B might provide values in a format that is not valid for TCA number and date columns. Most *E1* and *E2* errors occur due to changes in information codes that D&B provides for the data elements. All errors are listed in the HZ\_PARTY\_INTERFACE\_ERRORS table.

You should be able to access the interface table and correct any errors. After making the necessary corrections, change the STATUS codes from *E1* to *N* or from *E2* to *P1* so that the corrected data will be appropriately processed next time.

After resolving the issues, use the Load D&B Data program to import the data from the interface table into the TCA tables. In the Group ID parameter of the program, you can specify the group ID of the record that you want to import, for example the one that originally incurred an error. See: Load D&B Data, page 4-22.

## Automatic Correction of Invalid D&B Values

The application can automatically correct invalid values from D&B for specific attributes. Corrected values are loaded into the TCA Registry along with all other valid values.

### Invalid Values Changed to *N*

For specific attributes that need a *Y* or *N* value, if D&B provides something other than *Y*, *N*, or null, then the invalid value is automatically changed to *N*. Information about the correction is stored in the HZ\_PARTY\_INTERFACE\_ERRORS table, except in the cases of exceptions listed below.

The affected attributes and any exceptions are:

- ANNUAL\_SALES\_CONSOL\_IND
- AUDIT\_IND
- BANKRUPTCY\_IND

**Exception:** If D&B provides null, the corrected value is *N*. Likewise, *B* is changed to *Y*.

- BRANCH\_FLAG
- CLAIMS\_IND

- CONSOLIDATED\_IND
- CRIMINAL\_PROCEEDING\_IND
- DISADV\_8A\_IND
- DISASTER\_IND
- ESTIMATED\_IND
- EXPORT\_IND
- FINAL\_IND
- FINCL\_EMBT\_IND
- FINCL\_LGL\_EVETN\_IND
- FISCAL\_IND
- FORECAST\_IND
- IMPORT\_IND
- JUDGEMENT\_IND
- Exception:** If D&B provides null, the corrected value is *N*. Likewise, *J* is changed to *Y*.
- LABOR\_SURPLUS\_IND
- LIEN\_IND
- MINORITY\_OWNED\_IND
- NO\_TRADE\_IND
- Exception:** If D&B provides null, the corrected value is *Y*.
- OOB\_IND
- Exception:** If D&B provides *OB*, the corrected value is *Y*.
- OPENING\_IND
- OPRG\_SPEC\_EVNT\_IND
- OTHER\_SPEC\_EVNT\_IND
- PARENT\_SUB\_IND

- PROFORMA\_IND

**Exception:** If D&B provides null, the corrected value is N.

- PRNT\_HQ\_BKCY\_IND
- QUALIFIED\_IND
- RESTATED\_IND
- SECURED\_FLNG\_IND
- SIGNED\_BY\_PRINCIPALS\_IND
- SMALL\_BUS\_IND
- SUIT\_IND

**Exception:** If D&B provides null, the corrected value is N. Likewise, J is changed to Y.

- TRIAL\_BALANCE\_IND
- UNBALANCED\_IND
- WOMAN\_OWNED\_IND

#### Invalid Values Changed to Null or Valid Value

For specific attributes, invalid D&B values are changed to null or a correct value. Information about the correction is stored in the HZ\_PARTY\_INTERFACE\_ERRORS table.

This table shows the attributes that are validated against tables and the corrected values.

Attribute	Table Name	Corrected Value
ANNUAL_SALES_CURRENCY	FND_CURRENCIES	Null
CAPITAL_CURRENCY_CODE	FND_CURRENCIES	Null
FINANCIAL_NUMBER_CURRENCY	FND_CURRENCIES	Null
MAX_CREDIT_CURRENCY	FND_CURRENCIES	Null

Attribute	Table Name	Corrected Value
PHONE_COUNTRY_CODE	HZ_PHONE_COUNTRY_CODES	Null
PREF_FUNCTIONAL_CURRENCY	FND_CURRENCIES	Null
TANGIBLE_NET_WORTH_CURR	FND_CURRENCIES	Null

This table shows the attributes that are validated against lookup types and the corrected values.

Attribute	Lookup Type	Corrected Value
HQ_BRANCH_IND	HQ_BRANCH_IND	Null  If D&B provides any of these values, they are corrected as follows: <ul style="list-style-type: none"> <li>• H becomes HQ</li> <li>• B becomes BR</li> <li>• S becomes SL</li> </ul>
LOCAL_BUS_IDEN_TYPE	LOCAL_BUS_IDEN_TYPE	Null
RENT_OWN_IND	OWN_RENT_IND	Null

#### Invalid Values Accepted as Valid Lookup Code

For specific attributes that are validated against lookups, invalid D&B values are accepted and automatically added as a valid lookup code to the corresponding lookup type. Information about this correction is not stored in the HZ\_PARTY\_INTERFACE\_ERRORS table.

This table shows the attributes and the corresponding lookup types.

Attribute	Lookup Type
CREDIT_SCORE_COMMENTARY1 to CREDIT_SCORE_COMMENTARY10	CREDIT_SCORE_COMMENTARY
CREDIT_SCORE_OVERRIDE_CODE	FAILURE_SCORE_OVERRIDE_CODE
EMP_AT_PRIMARY_ADR_EST_IND	EMP_AT_PRIMARY_ADR_EST_IND
EMP_AT_PRIMARY_ADR_MIN_IND	EMP_AT_PRIMARY_ADR_MIN_IND
FAILURE_SCORE_COMMENTARY1 to FAILURE_SCORE_COMMENTARY10	FAILURE_SCORE_COMMENTARY
FAILURE_SCORE_OVERRIDE_CODE	FAILURE_SCORE_OVERRIDE_CODE
LEGAL_STATUS	LEGAL_STATUS
LOCAL_ACTIVITY_CODE	LOCAL_ACTIVITY_CODE_TYPE provided by D&B
REGISTRATION_TYPE	REGISTRATION_TYPE
SIC_CODE1 to SIC_CODE6	SIC_CODE_TYPE provided by D&B
TOTAL_EMP_EST_IND	TOTAL_EMP_EST_IND
TOTAL_EMP_MIN_IND	TOTAL_EMP_MIN_IND
TOTAL_EMPLOYEES_IND	TOTAL_EMPLOYEES_INDICATOR

#### Combined Validations and Corrections

- The LOCAL\_ACTIVITY\_CODE\_TYPE attribute is validated against the LOCAL\_ACTIVITY\_CODE\_TYPE lookup type. If D&B provides an invalid value, then the LOCAL\_ACTIVITY\_CODE\_TYPE and LOCAL\_ACTIVITY\_CODE attributes are both corrected to null.  
  
 If D&B provides null for the LOCAL\_ACTIVITY\_CODE\_TYPE attribute, and the LOCAL\_ACTIVITY\_CODE attribute is not null, then the LOCAL\_ACTIVITY\_CODE attribute is corrected to null.
- The SIC\_CODE\_TYPE attribute is validated against the SIC\_CODE\_TYPE lookup type. If D&B provides an invalid value, then the SIC\_CODE\_TYPE and SIC\_CODE1

to SIC\_CODE6 attributes are all corrected to null.

If D&B provides a value for any of the SIC\_CODE attributes and null for the SIC\_CODE\_TYPE attribute, then the SIC\_CODE\_TYPE attribute is corrected to *1985 SIC*. Both SIC\_CODE\_TYPE and SIC\_CODE attributes must have a value or none at all. If D&B provides null for all SIC\_CODE attributes, then the SIC\_CODE\_TYPE attribute is corrected to null.

## Related Topics

Online Purchasing, page 4-10

## Load D&B Data

Use the Load D&B Data program to load corrected, online-purchased D&B information from the HZ\_PARTY\_INTERFACE table into the appropriate TCA tables. See: Correcting Mapping API Utility Errors, page 4-17. The Mapping API utility ensures that the information in the D&B data elements populate the appropriate fields and TCA tables.

## Prerequisites

Before you can run the Load D&B Data program, the HZ\_PARTY\_INTERFACE table must be populated with data from online purchasing.

## Program Parameter

Use the following parameter to submit the Load D&B Data program.

### Group ID

By default, every record from online purchase is automatically assigned a group ID. Enter the group ID of the record that you want to reload after it was corrected. If every record in the interface table has a group ID, the program processes nothing if you leave the parameter blank.

## Related Topics

Online Purchasing, page 4-10

## Batch Loading

Use the batch load process to update D&B information for a large number of parties on a regular schedule or whenever you need. You can update all parties, gather data only for new parties, or update parties that have not been updated since a specified date. Batch retrieval and loading of D&B information is usually a regularly scheduled, automated process that you set up and run.

When you obtain D&B information about a company that does not exist in the TCA Registry, a new party is created using the D&B data. See: Details on Creating Parties with D&B Information, page 4-10.

If you are batch loading to update parties that already have D&B data, only the records with a mapped D-U-N-S Number are updated. See: Source System Management Impact, page 4-7.

## Related Topics

Third Party Data Integration Overview, page 4-1

## Process Overview

The batch loading process you use depends on the database version you are on.

### Procedure for Oracle9i and Above

1. Run the Generate Request List for DNB Batch Load program to generate a list of parties that you want to request D&B data for, page 4-24.
2. Transfer the file containing the request list to D&B, page 4-26.
3. Receive a properly formatted file, ready for loading, from D&B.
4. Create a batch ID using the Create Import Batch API, page 2-3.
5. Run the D&B Import Adapter request set to load D&B information into the interface tables, page 4-26.

**Note:** If you use a method other than the D&B Import Adapter, then you must pass a valid D&B value in the CONTENT\_SOURCE\_TYPE column to make the information from D&B available for the Single Source of Truth record. See: Single Source of Truth Overview, *Oracle Trading Community Architecture Administration Guide*.

6. Optionally verify that the D&B information is loaded into the interface tables as expected.
7. Review the settings for import profile options and modify if needed. See: Bulk Import Deployment Category, *Oracle Trading Community Architecture Administration Guide*.
8. Run the Import Batch to TCA Registry program to load D&B information from the interface tables into the appropriate HZ tables, page 2-9. For the Import Run

Options parameter, select to run both the preimport and import processes.

9. Correct errors, if any, page 2-18. Most errors occur due to changes in information codes that D&B provides for the data elements.

### Procedure for Oracle8i and Below

1. Run the Generate Request List for DNB Batch Load program to generate a list of parties that you want to request D&B data for, page 4-24.
2. Transfer the file containing the request list to D&B, page 4-26.
3. Receive a properly formatted file, ready for loading, from D&B.

4. Run the SQL\*Loader utility to load the provided D&B file into the HZ\_PARTY\_INTERFACE table. The SQL\*Loader command is:

```
Sqlldr userid=<User Name>/<Password>@<Database Name>  
control=ARHDNBGX.ctl data=<Data File Name>
```

The data file name is the name of the flat file from D&B. You must pass a valid D&B value in the CONTENT\_SOURCE\_TYPE column to make the information from D&B available for the Single Source of Truth record.

Each newly loaded record in the interface table has a null GROUP\_ID column. If you want to import only a subset of records from the interface table into the TCA tables, you can manually populate that column with the same value for all records in the subset. You can then specify that group ID to transfer the subset of records from the interface table into TCA tables. See: Load D&B Data, page 4-22.

5. Run the Load D&B Data program to load D&B information from the interface table into the appropriate TCA tables, page 4-22.

Leave the Group ID parameter blank to process all records without a group ID in the interface table. By default, the records that you batch load into the HZ\_PARTY\_INTERFACE table from the D&B file have no group ID.

If you do assign a group ID to any of the records, you can:

- Leave the parameter blank to process all records except those assigned a group ID.
- Enter a group ID to process a subset of records with the same ID.

6. Correct errors, if any, page 4-17.

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

Use the Generate Request List For DNB Batch Load program to select and generate a text file of the parties that you require updated D&B information for. The request list

includes the following data elements:

- D-U-N-S Number
- Party name
- Address1
- Address2
- Address3
- Address4
- City
- State
- Country
- Postal code
- Party ID
- Phone number

After the Generate Request List For DNB Batch Load program successfully completes, you can find the request list in the usual directory for concurrent request output files.

The Party ID for each party is included in the output file that D&B returns to you after you submit your request list and is used to match D&B information to the appropriate party in the TCA Registry.

### **Program Parameters**

Use the following parameters to submit the Generate Request List For DNB Batch Load program.

#### **Request list option**

Select the type of request list that you want to generate:

- All parties
- Only parties not having D&B data
- Only parties whose D&B data was last updated prior to the date in the last update date parameter

**Important:** If you select options 1 or 2, of the parties that already have D&B data, only the ones with the mapped D-U-N-S Number are included in the request list.

#### Last Update Date

Enter the last update date that you want to base the request on. You need to specify this date only if you are using request list option 3.

#### Related Topics

Batch Loading, page 4-22

### Transferring a Request List File to D&B

You must make specific arrangements with D&B for the transfer of the file that identifies the parties that you are requesting data for. Through a manual process, you usually sends the file to D&B on a cartridge or a diskette. The file can also be sent to D&B using File Transfer Protocol (FTP) or as an e-mail attachment.

#### Related Topics

Batch Loading, page 4-22

### D&B Import Adapter

Run the D&B Import Adapter request set to load data, from the ASCII flat file that D&B provides for batch loading, into the interface tables used for TCA Bulk Import. The flat file contains D&B information for the parties that you requested.

A flat file is loaded as a batch into the interface tables. At any given time, only one D&B batch can be actively loading into the interface tables, but the interface tables can store multiple D&B batches.

**Note:** The D&B Import Adapter request set supports only standard D&B bulk files for the Enterprise Management data product.

#### Prerequisites

1. Manually create a directory object on the same environment as your TCA database. A directory object is a database object that stores the absolute path of a physical directory on the database node. Name this object HZ\_DNB\_SOURCE\_DIR, and make sure the database server can read and write from the location identified by the directory object.

For example, create the directory object in APPS as follows:

```
CREATE or replace DIRECTORY HZ_DNB_SOURCE_DIR AS '/emslog/dnb'
```

If the object is not in APPS, you must also grant access to APPS:

```
GRANT READ ON DIRECTORY HZ_DNB_SOURCE_DIR TO apps;  
GRANT WRITE ON DIRECTORY HZ_DNB_SOURCE_DIR TO apps;
```

**Note:** You only need to create this directory object once, to be used for all D&B Import Adapter requests.

2. Copy or FTP the flat file from D&B to the location that the directory object identifies.
3. Sort the flat file based on D-U-N-S Number to make sure that all D-U-N-S Numbers in the flat file are unique. For example, in UNIX:

```
sort -u -t, +0 -1 <file with duplicate DUNS Number> -o <output file name>
```

## Program Parameters

The D&B Import Adapter request set includes two programs that you must specify parameters for.

### D&B Flat File Upload Table Creation

- **Object Containing File Location:** Enter the name of the database object you created. You can override the *HZ\_DNB\_SOURCE\_DIR* default if you used another name.
- **Data File Name:** Enter the name of the flat file that D&B provided.
- **Log File Name:** Enter the case-sensitive name of the log file that is to be created for the upload.
- **Bad File Name:** Enter the case-sensitive name of the file that is to be created for the upload to store all bad records.
- **Discard File Name:** Enter the case-sensitive name of the file that is to be created for the upload to store all discarded records.

### D&B File Load - Pass 1

- **Batch Identifier:** Enter the batch ID that the Create Import Batch API generated. See Batch IDs, page 2-3.
- **Explicit NULL character value (G\_MISS\_CHAR):** Enter the character value in the interface tables that, when imported into the TCA tables, would make the corresponding TCA character column null. If an interface table column is null, the

corresponding TCA column, empty or not, is not affected by the import.

## Related Topics

Batch Loading, page 4-22

Loading Data into the Interface Tables, page 2-2

## Loading Rationalized Legacy Data

When you migrate from a legacy system to Oracle Applications, you might need to transfer legacy data into the TCA tables. If you want to cleanse your legacy data before loading the data into the TCA tables, you can use D&B rationalization services. You can then use the Import Batch to TCA Registry program to create new parties in the TCA tables for the rationalized legacy data and use the Customer Interface program to create customer accounts for those parties.

**Important:** Do not upload cleansed data from other third-party content providers when using this functionality.

### To load rationalized legacy data:

1. Compile a list of the parties in your legacy system that you want D&B to rationalize. Each party in the list must include a unique identifier. This unique identifier maps to the Original System Reference field in the TCA tables.
2. Transfer your list to D&B. For more information, see: Transferring a Request List File to D&B, page 4-26.
3. D&B compares the companies in your list with the companies in the D&B database and rationalizes the data on your list. After rationalizing your data, D&B sends three flat ASCII files back to you:
  - **First file:** Matched, unmatched, and duplicate records as well as information appended from D&B's database for each company
  - **Second file:** All the duplicate records, listed in order of D-U-N-S number
  - **Third file:** Records that D&B could not find a D-U-N-S number for
4. Run the D&B Import Adapter request set to load D&B information from the first flat file into the interface tables, page 4-26.
5. Run the Import Batch to TCA Registry program to load D&B information from the interface tables into the appropriate TCA tables, page 2-9. The program creates

parties in the TCA tables and maps the unique identifier that you identified in step 1 to the Original System Reference field.

6. Run the Customer Interface program to associate legacy customer accounts with your newly created parties. The Customer Interface program matches customer accounts to parties using the Original System Reference field. See: Customer Interface, page 3-1.

## Related Topics

Third Party Data Integration Overview, page 4-1

## Viewing Information from Data Sources

Third Party Data Integration lets you view information from all relevant data sources for any given party. Before you acquire any third party data about a party, you can only view the user-entered party information. After you purchase and retrieve D&B information for a party, for example, you can also view the D&B information.

User-entered information is entered or loaded by users of Oracle Applications. The displayed D&B information depends on which data product you purchase for that party, either ordered online or batch loaded. See: Selecting Data Products or BIRs, page 4-13.

## Procedure

1. Search for the party that you want to view. See: Searching for Existing Parties in the TCA Registry, page 4-12.
2. For details about the information you can view for the party, see: Subtabs of Information, page 4-29.
3. Optionally choose to purchase new or updated D&B information for that party. See: Searching for Companies in the D&B Database, page 4-12.

## Related Topics

Third Party Data Integration Overview, page 4-1

## Subtabs of Information

### Summary, Business Verification, and Special Event

The Summary and Special Event subtabs display the user-entered and D&B information for the party. The Business Verification subtab can show the Single Source of Truth

(SST) information, depending on the SST administration. See: Single Source of Truth Overview, *Oracle Trading Community Architecture Administration Guide*.

If the SST record is set up, you see the D&B information in the D&B column and the SST information in the Single Source of Truth column. If SST is not set up, you see the user-entered information in the Customer Record column.

The subtabs provide the following:

- **Summary:** The Summary subtab provides general information about the party such as D-U-N-S Number, address, and the last update date.
- **Business Verification:** The Business Verification subtab provides:
  - Demographic information such as CEO name, fiscal year-end month, potential revenue, and functional currency.
  - Business keys such as legal status, business structure, SIC code, and local business identification.
  - Employee statistics such as the total number of employees and the number of employees at the location that you purchased D&B data for.
- **Special Event:** The Special Event subtab provides information about legal, financial, and operational events or activities, including disasters, that might affect a company's creditworthiness.

## Relationships, BIR, Credit / Risk, and Financial Analysis

These subtabs only display information provided by D&B. The data product purchased for the party determines which data elements in these subtabs contain values.

- **Relationships:** The Relationships subtab displays business and legal structure information, including branch to headquarters and parent to subsidiary relationships, for up to five related entities or organizations: Primary Organization, Headquarters, Parent, Domestic Ultimate, and Global Ultimate. For each relationship, the displayed information can consist of the related party's name, D-U-N-S Number, address, and telephone number.
- **BIR:** The BIR (Business Information Report) subtab displays an image of the BIR for the party, providing detailed business and financial information.
- **Credit / Risk:** The Credit / Risk subtab displays payment and risk information. Some of the data elements included are Paydex data, D&B Rating, delinquency scores, and failure scores.

**Note:** For a key to the D&B Ratings, contact your local D&B representative or D&B's Global Service Center at (888)243-4566, or

visit Customer Service at <http://www.dnb.com>.

- **Financial Analysis:** The Financial Analysis subtab displays available income statement and balance sheet data as well as financial ratios. This subtab also indicates whether the financial statements are consolidated, audited, restated, and so on.

## Related Topics

Viewing Information from Data Sources, page 4-29

## Duplicate DUNS Report

Use the Duplicate DUNS report to identify parties with the same D-U-N-S Number in the TCA Registry. You can run the report to find duplicates for a particular D-U-N-S number or duplicates for any D-U-N-S Number.

For each party with the same D-U-N-S Number, the report displays:

- Party name
- Party number
- Address
- City
- State
- Country

## Report Parameters

Use the following parameters to run the Duplicate DUNS report.

### Duplicate DUNS Number

Enter the D-U-N-S Number that you want to identify duplicates for.

If you enter a D-U-N-S Number, the report only displays a result if two or more parties use that same D-U-N-S Number. If you leave the parameter blank, the report displays any duplicated D-U-N-S Numbers and the parties associated with those D-U-N-S Numbers.

## Related Topics

Third Party Data Integration Overview, page 4-1

## DNB Global Data Products Request Report

Use the DNB Global Data Products Request report to find out when D&B products were requested, who requested each product, and which GDP was purchased. The report provides information that you can use to control the purchase of and access to D&B information.

The report contains the following details about each request:

- Party name
- Party number
- Requested product

**Note:** If Batch Load appears in this column, the last update to this party's D&B information was completed using the batch load process.

- Purchaser
- Purchased date

## Report Parameters

Use the following parameters to run the DNB Global Data Products Request report.

### Start Date

Enter the date that you want to report from.

### End Date

Enter the date that you want to report to.

## Related Topics

Third Party Data Integration Overview, page 4-1

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## Locations and Phones

This chapter covers the following topics:

- Locations Overview
- Address Formatting
- Real-Time Address Validation
- Batch Address Validation
- eLocations Spatial Data Integration
- Generate Time Zone for Locations
- Generate Time Zone for Phone Numbers

### Locations Overview

In the TCA Registry, a location is a point in geographical space, usually defined by an address. Oracle Trading Community Architecture provides these features for locations:

- **Address validation:** The process of comparing raw or user-entered addresses against a known or authorized data source, to determine if the addresses are recognized and correct according to the authority's database. You can:
  - Validate addresses in real time as you enter them. See: Real-Time Address Validation, page 5-3.
  - Validate existing addresses in the TCA Registry in bulk. See: Batch Address Validation, page 5-6.
- **eLocations Spatial Data Integration:** Acquire longitude and latitude information for locations in the Registry. See: eLocations Spatial Data Integration, page 5-8.
- **Time zones:** Generate time zones for locations in the Registry. See: Generate Time Zone for Locations, page 5-11

The standard Flexible Address Formatting feature is also used for entering addresses into TCA. See: Address Formatting, page 5-2.

## Related Topics

Using Oracle Trading Community Architecture, page 1-5

## Address Formatting

Address formatting determines which address elements are displayed, and in what order, for address entry and update. A format specific to a region, such as a country, is an address style.

For example, the address style for the United States is:

Building, Street, Unit Number  
City  
State  
Zip Code  
Country

Oracle Trading Community Architecture and other Oracle E-Business Suite applications use the Flexible Address Formatting feature. See: Flexible Addresses, *Oracle Receivables Implementation Guide*. The Flexible Address Formatting setup determines which address style is used for each country.

**Note:** Aside from providing the address format, address styles can also determine which address elements are mandatory and provide lists of valid values for specific address fields.

The real-time address validation based on Geography Hierarchy works alongside Flexible Address Formatting validation. For example, the address style provides you a list of valid states for US addresses, if the value set is defined. In addition, real-time address validation also provides valid states as part of address suggestions. See: Real-Time Address Validation, page 5-3.

## Address Entry and Formatting Process

1. In the address entry UI, you select a country. Available countries are from the FND\_TERRITORIES table.
2. Address elements for entry are displayed based on the Flexible Address Formatting address style defined for the selected country.
3. Enter address information.

The address style can provide valid address elements, if defined, for you to choose from. For example, if you select United States as the country, the application can

provide a list of valid states, which comes from Flexible Address Formatting setup.

4. Attempt to save your address.
  1. If mandatory address elements are defined for the address style, then the application checks that they are entered. For example, if the US address style is defined so that State is mandatory, then you can save the address only if you have entered a state.
  2. If real-time address validation is set up, then the address is validated and saved, or not, based on the validation process. See: Address Entry and Real-Time Validation Process, page 5-4.

## Related Topics

Locations Overview, page 5-1

## Real-Time Address Validation

Real-time address validation validates addresses during address entry.

Addresses can be validated in real time using two distinct repositories:

1. TCA Geography Hierarchy setup
2. Third party address validation adapter database

If validation is performed using both the above repositories, the TCA Geography Hierarchy setup takes precedence for the common attributes set up in the two repositories. For example, if the City attribute is set up in the TCA Geography Hierarchy setup and the Third Party Address Validation Adapter database, then the City in the TCA Geography Hierarchy setup takes precedence.

**Note:** The TCA Geography Hierarchy setup does not validate Address Line 1, Address Line 2, Address Line 3 and Address Line 4.

In the Address CPUI component, real time addresses are validated using one or both of the repositories listed above. For more information, see: Geography Hierarchy Overview, *Oracle Trading Community Architecture Administration Guide*, Creating Address Validation Adapters, *Oracle Trading Community Architecture Administration Guide*, and Address Validation Deployment Category, *Oracle Trading Community Architecture Administration Guide*.

If Flexible Address Formatting is also set up, then you first use this feature when you enter an address. See: Address Formatting, page 5-2. When you try to save the address, you then go through the real-time address validation process.

## Address Entry and Real-Time Validation Process

1. In the address entry UI, you select a country. Available countries are from the FND\_TERRITORIES table.
2. If Flexible Address Formatting is set up, then address elements are displayed and possibly validated based on the address style defined for the selected country. See: Address Entry and Formatting Process, page 5-2.
3. Enter address information and attempt to save your address.

**Note:** To display an asterisk for mandatory fields in the Address page, you must define these fields as mandatory in FAF and address validation, if both are used.

1. Address validation automatically completes addresses when you enter enough address elements to uniquely determine other address information. For example, you enter a zip code for a US address, and the application automatically fills in the corresponding city and state, based on Geography Hierarchy data.
2. If a unique match is not found, then real-time address validation can also provide valid, suggested address elements for you to choose from. For example, if you select United States as the country, and San Francisco as the city, then the application can provide valid state, county, and city combinations, which come from the Geography Hierarchy setup. If the HZ: Validate First 5 Digits of US ZIP Code profile option is set to Yes, or you have not specified a value for the profile, and you enter more than five digits for a US ZIP code, then only the first five digits are validated against the Geography repository. If the first five digits are valid according to the HZ\_GEOGRAPHIES, then the 5-digit ZIP code is displayed in the list of suggestions in the - State, County, City, and ZIP Code format. If the first five digits of the US ZIP code are valid, then the remaining digits after the fifth digit are stored in the ZIP+4 format.
3. The address is validated and accordingly saved, or not, based on the geography validation level set up for the country.
  - **Error:** Only completely valid addresses can be saved. If there are multiple valid combinations, you can select from the displayed suggestions.
  - **Warning:** Invalid addresses can be saved after issuing you a warning, but you must enter all mandatory address elements, as defined in Geography Hierarchy setup. If there are multiple valid combinations, you can select from the displayed suggestions.

- **Mandatory Fields Only:** Invalid addresses can be saved without warning, but you must enter all mandatory address elements, as defined in Geography Hierarchy setup.
- **No Validation:** All addresses can be saved.

## Use Cases for Real Time Address Validation

The following are the use case scenarios when real time address validation is enabled and the Geography Hierarchy setup is used for the address in the Address user interface:

1. You enter the Address Line 1, City, State, and Zip, and click the Verify Address button. The address validation adapter returns only the following address elements: Address Line 1, Address Line 2, City, and State but not the Zip. The suggestion box displays combinations of the State, County City and the Zip and when you select a combination, the Geography setup overrides the results of the address validation adapter and forces you to save the address with the zip. In such case the complete address displayed is Address Line 1, Address Line 2, City, State, and Zip.
2. You enter the Address Line 1, City, County, State, and Zip, and click the Verify Address button. The address validation adapter returns only the following address elements: Address Line 1, Address Line 2, City, State, and Zip but not the County. The suggestion box displays combinations of the State, County City and the Zip and when you select a combination, the Geography setup overrides the results of the address validation adapter and forces you to save the address with the county. In such case the complete address displayed is Address Line 1, Address Line 2, City, State, County, and Zip.
3. You enter the Address Line 1, County, State, and Zip, and click the Verify Address button. The address validation adapter returns only the following address elements: Address Line 1, Address Line 2, County, State, and Zip but not the City. The suggestion box displays combinations of the State, County City and the Zip and when you select a combination, the Geography setup overrides the results of the address validation adapter and forces you to save the address with the city. In such case the complete address displayed is Address Line 1, Address Line 2, City, State, County, and Zip.
4. If the profile HZ: Validate first 5 Digits of US ZIP code is set to No and you enter the Address Line 1, City, State, and Zip + 4, and click the Verify Address button. The address validation adapter returns only the following address elements: Address Line 1, Address Line 2, City, and State but not the Zip + 4. The suggestion box displays combinations of the State, County City and the Zip + 4 and when you select a combination, the Geography setup overrides the results of the address validation adapter and forces you to save the address with the Zip + 4. In such case

the complete address displayed is Address Line 1, Address Line 2, City, State, and Zip + 4.

## Related Topics

Locations Overview, page 5-1

## Batch Address Validation

Run the Address Validation program to validate addresses in the TCA Registry in bulk. The program sends data to the address validation black box, which must be integrated with at least one adapter for address validation. For example, if the adapter is integrated with a third party product called Gorman, the adapter would validate the TCA addresses against the Gorman address database. See: *Administering Adapters, Oracle Trading Community Architecture Administration Guide*.

Each address is validated through the default adapter set up for each country. For example, if the Gorman adapter is the default for Peru, all Peruvian addresses in the Registry are validated against Gorman's standard addresses.

If an address from the TCA Registry differs from the validated address, the TCA address is updated with the validated address only if the TCA address is valid above a specified threshold. Such an update is called an address correction. For example, if you set the Override Threshold parameter at the Municipality Match level, then an address is corrected if at least its city or town is valid.

**Note:** Aside from the validation threshold, address correction only occurs if the update does not violate other validations, such as tax validation rules.

Your administrator can set up address validation, including determining the timeout limit for communication with third party service providers and custom solutions. The default is 300 seconds. See: *Setting Up Batch Address Validation, Oracle Trading Community Architecture Administration Guide*.

## Program Parameters

The Address Validation program has three pairs of parameters, each including a filter operator and the corresponding value, to determine which addresses in the TCA Registry to include in the address validation.

For each parameter pair, you must use both or neither. To include addresses that were never validated, do not use the validation status and date validated parameters.

### Validation Status Filter

Specify the operator for filtering addresses to validate, based on the last validation

status. For example, you enter `<=` and select 3 as the validation status code. The program would include only addresses that have validation status 3, 2, 1, or 0 from the last address validation.

### **Validation Status Code**

Enter the validation status to use with the validation status filter for including only addresses based on their last validation status. The program considers addresses last validated by any adapter, unless you specify one in the Adapter parameter.

### **Date Validated Filter**

Specify the operator for filtering addresses to validate, based on the last validation date. For example, you enter `>` and `01-JAN-2004` as the validation date. The program would include only addresses that were last validated on January 2, 2004 or later.

### **Date Validated**

Enter the validation date to use with the date validated filter for including only addresses based on their last validation date. The program considers addresses last validated by any adapter, unless you specify one in the Adapter parameter.

### **Last Update Date Filter**

Specify the operator for filtering addresses to validate, based on the last update date. For example, you enter `<` and `01-JAN-2004` as the validation date. The program would include only addresses that were last updated on December 31, 2003 or earlier.

### **Last Update Date**

Enter the update date to use with the last update date filter for including only addresses based on their last update date. Updates include user-entered changes, address corrections, or enrichment from a third party data source such as D&B.

### **Country**

Leave this parameter blank to validate addresses in all countries, or enter the country you want to validate.

### **Adapter**

Enter the adapter that you want to use to validate addresses against. Use this parameter, for example, to validate against a specific source after the source's libraries are updated with new data.

If you use the validation status or date validated parameters, the program further limits the addresses to only those last validated by the specified adapter.

## Override Threshold

Enter the code for the validation threshold that an address must reach or exceed to be corrected with the valid address. For example, if you select 2, addresses must be validated at least to the street or thoroughfare level to be updated. Addresses with validation status 0, 1, or 2 would be updated.

This table describes the available status codes.

Status	Meaning	Description
0	Valid Address	The address is verified.
1	Multiple or Ambiguous Address	The address is verified only up to the street level. However, there is ambiguity in locating the specific address.
2	Street or Thoroughfare Match	The address is verified only up to the street level.
3	Municipality Match	The address is verified only up to the city or town levels.
4	Administrative Subdivision Match	The address is verified only up to the state level.
5	Country Match	The address is verified only at the country level.
6	No Match	The address cannot be verified.

## Related Topics

[Locations Overview, page 5-1](#)

## eLocations Spatial Data Integration

Oracle Trading Community Architecture (TCA) eLocations Spatial Data Integration lets you retrieve spatial information from Oracle eLocations. Oracle eLocations provides mapping, geocoding, and driving directions for the US and supports a range of applications, from mapping, asset management, and transportation applications to wireless location services and location-enabled e-business.

The spatial data that eLocations provides through the TCA integration contains the latitude and longitude for any location within the US. You can acquire and store this

information for your addresses in the TCA Registry.

You run the Spatial Information for Locations Batch Update program in eLocations Spatial Data Integration to retrieve spatial data from eLocations into the TCA Registry. See: Spatial Information for Locations Batch Update, page 5-9.

The program starts a PL/SQL script to generate a spatial data request that is sent to eLocations via an HTTP query post. An API parses the response from eLocations and, if the results are successful, updates the HZ\_LOCATIONS table with the latitude and longitude for the requested locations.

Your administrator can set up eLocations Spatial Data Integration. See: Setting Up eLocations Spatial Data Integration, *Oracle Trading Community Architecture Administration Guide*.

## Related Topics

Locations Overview, page 5-1

## Spatial Information for Locations Batch Update

Use the Spatial Information for Locations Batch Update program to get the latitude and longitude values for locations that do not have any spatial data and for locations that contain manual updates since the last run of the program, or for all records. Enter Yes to get spatial data only for locations without any spatial data or with manual updates since the last run of this program. Enter No to update all locations.

In the request to eLocations, you can limit the addresses that you want spatial data for by site use, country, and other criteria. You can update all records that satisfy the criteria or specify a number of records, for example, the first 100 records that match the criteria. The location ID orders the addresses, so the first records are usually the older ones.

## Program Parameters

Use the following parameters to submit the Spatial Information for Locations Batch Update program.

### Location Type

Specify whether you want spatial data for locations that are tied to party addresses or not.

### Site Use

Enter the site use for the locations that you want spatial data for.

### State

Enter the state for the locations that you want spatial data for. This field is case insensitive.

**Province**

Enter the province for the locations that you want spatial data for. This field is case insensitive.

**City**

Enter the city for the locations that you want spatial data for. This field is case insensitive.

**Country**

Enter the country for the locations that you want spatial data for.

**Identifying Addresses Only**

Enter *Yes* or *No* to indicate whether you want spatial data for only identifying addresses or all addresses.

**Only Unretrieved Locations**

Enter *Yes* if you want spatial data only for locations without any spatial data or with manual updates since the last run of this program. Enter *No* to update all locations.

**Update Records For**

Enter *ALL* if you want spatial information for all records that correspond to the previous parameters or *SUBSET* for only a subset of records.

**Number of Records in Subset**

Enter the number of records that you want spatial data for if you selected *SUBSET* in the Update Records For parameter.

**Accuracy Level**

Select the accuracy level. Locations having this accuracy level are updated.

This LOV displays the following values:

- **0 No Match**
- **1 Exact match:** City name, postal code, street base name, street type/suffix/prefix and house number attributes are matched.
- **2 City, postal code, street base name and house number match:** The city, postal code, street base name, and house number attributes are matched, but the street type, suffix or prefix attribute is not matched.
- **3 City, postal code and street base name match:** The city, postal code, and street base name attributes are matched.

- **4 Postal code and city match:** The postal code and city attributes are matched.
- **10 City matches:** The city name attribute is matched, but the postal code attribute is not matched.
- **11 Postal code matches:** The postal code attribute is matched, but the city name attribute is not matched

### Records Geocoded Using

Specify the source to be used for geo coding. Select from any of the following values:

- **eLocation** - Retrieves new records and records that have eLocation as the source.
- **Any Source** - Retrieves all records.

The default value is eLocation.

### Location Status

Select the status of the location. The status of a location can be Active, Inactive, or All. The All option also includes merged records. The default value is Active.

### Related Topics

eLocations Spatial Data Integration, page 5-8

## Generate Time Zone for Locations

Use the Generate Time Zone for Locations program to create or update time zone information for all existing locations in the TCA Registry. The time zone information is based on the country, or for the United States only, the state.

### Program Parameter

Use the following parameters to submit the Generate Time Zone for Locations program.

### Overwrite Existing Time Zone

Specify whether the program should overwrite existing time zones.

### Related Topics

Locations Overview, page 5-1

## Generate Time Zone for Phone Numbers

Use the Generate Time Zone for Phone Numbers program to create or update time zone

information for all existing phone numbers in the TCA Registry. The time zone information is based on the phone setup by your administrator. See: *Defining Time Zones for Phones, Oracle Trading Community Architecture Administration Guide*.

For example, the US phone setup is based on area codes, since the country has multiple time zones. For the 650 or 858 area code, the program would assign the US west coast time zone.

## **Program Parameter**

Use the following parameter to submit the Generate Time Zone for Phone Numbers program.

## **Overwrite Existing Time Zone**

Specify whether the program should overwrite existing time zones.

## **Related Topics**

[Locations Overview, page 5-1](#)

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## Relationship Manager

This chapter covers the following topics:

- Relationship Manager Overview
- Party Relationship Management Process
- Searching for Parties and Viewing Results
- Viewing Relationships
- Creating Relationships
- Editing Relationships
- Viewing Relationship Hierarchies

### Relationship Manager Overview

Use Oracle Trading Community Architecture (TCA) Relationship Manager to create and manage relationships among existing parties in the TCA Registry.

**Note:** You view and manage only parties of type Organization and Person in Relationship Manager.

Using relationships to model the interactions among parties in the TCA Registry helps you make better business decisions. For example, you can analyze and manage relationships with competitors and partners, or corporate relationships between subsidiaries and parent corporations.

In Relationship Manager, you get a comprehensive view of the roles that a single party plays with respect to other parties in the Registry, as well as a hierarchical view for hierarchical relationships. Aside from viewing relationships, you can create, edit, and end relationships.

Your administrator can set up Relationship Manager. See: *Setting Up Relationship Manager, Oracle Trading Community Architecture Administration Guide*.

## Related Topics

Relationships Overview, page 6-2

Major Features, page 6-4

Party Relationship Management Process, page 6-5

Using Oracle Trading Community Architecture, page 1-5

## Relationships Overview

The TCA relationship model lets you record complex, real-life relationships among entities in the TCA Registry. You can analyze not only direct relationships such as those with your competitors, but also indirect ones such as your customers' customers. You can also manage hierarchical relationships to better understand, for example, the management hierarchy within an organization.

A relationship represents the way two entities interact with each other, based on the role that each entity takes with respect to the other. For example, the employment relationship between a person and an organization is defined by the role of the person as the employee and the organization as the employer.

In addition, every relationship is reciprocal. Each entity is either the subject or object, depending on the perspective, or direction. For example, if Joe is the employee of Oracle, then Joe is the subject and Oracle is the object. Oracle as the employer of Joe, which flips the subject and object, still describes the same relationship.

## Relationship Phrase and Role Pairs

A relationship phrase and role pair contains a correlating phrase pair and role pair, which describes the reciprocal roles that the two entities play in the relationship. For example, a relationship phrase and role pair contains the Employee Of and Employer Of phrase pair as well as the Employee and Employer role pair.

Every relationship is based on a relationship phrase and role pair. Even though only phrase pairs are used in Relationship Manager, the corresponding role pair is still stored in the system for each relationship.

A phrase pair, such as Employee Of and Employer Of, describe the role of either entity in the relationship as the subject. For example, Joe as the subject of the relationship would have Employee Of as the phrase, and Oracle as the subject would have Employer Of. The other entity in the relationship would be the object.

A relationship role pair, such as Employee and Employer, describes the two entities no matter the direction of the relationship. For example, Joe has the Employee role and Oracle the Employer role, both as either the subject or object.

Each relationship phrase and role pair also determines the type of entities for the relationship. For example, the Employer Of phrase and Employer role can be defined so that the employer must be a party of type Organization and the employee a party of

type Person.

When you create a relationship with a relationship phrase or role, the reverse direction of the relationship is automatically created with the other phrase or role in the pair. For example, if you define Joe as the employee of Oracle, Oracle as the employer of Joe is also created.

## Relationship Type

Each relationship phrase and role pair belongs to a relationship type, which categorizes the types of relationships that you can create. For example, the relationship phrase and role pair described above would belong to an employment relationship type.

Relationship types determine if the relationships created with the type are hierarchical, and if not, whether they can be circular or not. For more information, see: Relationship Characteristics, page 6-3.

Every relationship type must contain at least one phrase and role pair. TCA provides seeded relationship types and phrase and role pairs, but your administrator can create new ones as needed. See: *Administering Relationships, Oracle Trading Community Architecture Administration Guide* and *Seeded Relationship Types, Phrases, and Roles, Oracle Trading Community Architecture Reference Guide*.

## Relationship Date Range

Both directions of a relationship share a start and end date. The start date signifies when the relationship starts, not necessarily when it was created. Likewise, the end date is when the relationship ends.

The relationship date range helps you analyze the history of an entity's relationships. For example, you can see that Joe used to work for Oracle in a subsidiary location for the past two years but has been working at Oracle headquarters since last month.

## Relationship Group

In general, relationship groups are used to determine which relationship roles and phrases are displayed in specific application user interfaces. Groups can also be used to categorize roles and phrases for other functional uses.

**Note:** Relationship groups do not apply to Relationship Manager. All seeded and user-created relationship phrases are available.

## Relationship Characteristics

Relationships have additional characteristics that relationship types determine.

### Hierarchical Relationships

A hierarchical relationship ranks one entity above the other. For example, in an

employment relationship, the employer is ranked above the employee. In the employment hierarchy, the employee would be a child that appears below its parent, the employer. Hierarchical relationships are created with phrase and role pairs that belong to a hierarchical relationship type.

### **Circular Relationships**

If a relationship type allows for circular relationships, you can create a relationship from Party A to Party B to Party C and back to Party A. For example, Party A is a competitor of Party B, which is a competitor of Party C, which is a competitor of Party A.

Hierarchical relationships cannot be circular. For example, if Alan's manager is Jenny, and Jenny's manager is Chris, then Chris's manager cannot be Alan.

Nonhierarchical relationship types can either allow or prevent circular relationships. For example, marital relationships cannot be circular, while competitive relationships described above can.

## **Major Features**

Relationship Manager provides these features for relationships between existing parties in the TCA Registry:

- Search for the party that you want to manage relationships for.
- View the party's basic party information and any available additional details.
- View the relationship types that the party is involved in.
- View the relationships that the party belongs to for specific types.
- View the hierarchy of a hierarchical relationship type.
- Create relationships, available when you view the relationship types, relationships, or hierarchies of the party.
- Edit existing relationships, including ending the relationship.

### **Relationship Hierarchy**

Relationship Manager displays hierarchical relationships in a hierarchy, a visual representation of the how parties rank among one another within a given relationship type. For any party in the hierarchy, all parties displayed one level below are its children, and the party displayed a level above is its parent.

For any party in the hierarchy, you can:

- Update its relationship by moving the party to another part of the hierarchy.

- Create new relationships.
- View additional party information, if available.

If you batch load data from D&B or acquire the Enterprise Management global data product (GDP) through online purchase, you can view the provided corporate structure relationships for a specific business in a relationship hierarchy. See: Introduction to D&B, page 4-3.

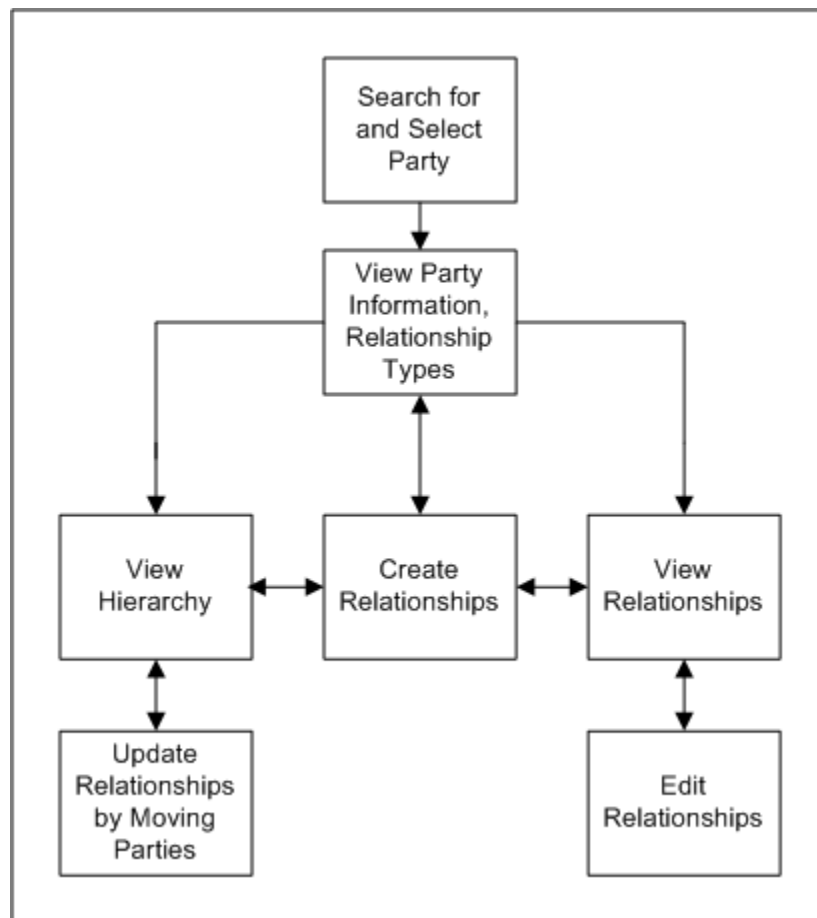
## Related Topics

Relationship Manager Overview, page 6-1

Party Relationship Management Process, page 6-5

## Party Relationship Management Process

This diagram describes the general process flow of managing party relationships with the Relationship Manager.



1. Search for the party that you want to view and manage relationships for and select the party from the search results. See: Searching for Parties and Viewing Results, page 6-7.

**Note:** If you want to see a relationship hierarchy, keep in mind that the party you search for is the root of the hierarchy.

2. View the party's overview information as well as the relationship types that it is involved in.

From here, you have three options:

- View relationships of selected relationship types. See: Viewing Relationships, page 6-8.
- Create new relationships with a relationship type that the party is not currently involved in. See: Creating Relationships, page 6-8.

After you create relationships, Relationship Manager takes you back to view the party's information and relationship types.

- View the hierarchy of a hierarchical relationship type. See: Viewing Relationship Hierarchies, page 6-11.

3. If you choose to view relationships, you can also:

- Create new relationships with a relationship type that you are viewing. See: Creating Relationships, page 6-8.
- Edit the existing relationships that you are viewing. See: Editing Relationships, page 6-10.

After you edit or create a relationship, Relationship Manager takes you back to view the relationships.

4. If you choose to view a hierarchy, you can also:

- Update relationships by moving parties within the hierarchy. See: Updating Relationships by Moving Parties in a Hierarchy, page 6-17.
- Create relationships for any party in the hierarchy, using the relationship type of the hierarchy. See: Creating Relationships, page 6-8.

After you move parties or create relationships, Relationship Manager takes you back to the hierarchy view.

## Related Topics

Relationship Manager Overview, page 6-1

## Searching for Parties and Viewing Results

Use the Party page to search for and select the party that you want to view and manage relationships for. This search includes parties of type Organization or Person.

If you want to see a relationship hierarchy, keep in mind that the party you search for is the root of the hierarchy. For example, if you view the corporate hierarchy for Party B, you can see Party C as the subsidiary of Party B but cannot see that Party B is a subsidiary of Party A. For more information, see: Viewing Relationship Hierarchies, page 6-11.

From the search results, you select the party that you want and bring up the Overview page. View the party's overview and relationship type information, including:

- The relationship types that the party is involved in.
- The number of relationships for each type.
- Whether the relationship type is hierarchical or not.
- Whether the type allows circular relationships or not.

If available, you can access more information about the party from the Additional Details field.

From the Overview page, you can choose to:

- View relationships, page 6-8.
- Create new relationships with a relationship type that the party is not currently involved in, page 6-8.
- View relationships hierarchies, page 6-11.

**Note:** You can also access the Overview page from other pages in Relationship Manager by clicking the party name.

## Related Topics

Party Relationship Management Process, page 6-5

Relationships Overview, page 6-2

## Viewing Relationships

Use the View Relationships page to view the relationships of the selected party. You can view relationships for some or all of the relationship types that the party is involved in.

The selected party is the subject party of all displayed relationships. You also see the object party name and Registry ID, the date range of the relationship, and the source of the relationship, for example user entered or third party. Even relationships with passed end dates are included.

### To view relationships for a party:

1. Navigate to the Overview page for the party that you want to view relationships for. See: Searching for Parties and Viewing Results, page 6-7.
2. Select at least one relationship type and click the View Relationships button.
3. The View Relationships page displays relationships for the party within your selected relationship types.
4. You can choose to:
  - Create relationships with one of the relationship types that you are viewing, page 6-8.
  - Edit any of the displayed relationships, page 6-10.

## Related Topics

Party Relationship Management Process, page 6-5

Relationships Overview, page 6-2

## Creating Relationships

Use the Create Relationships page to create new relationships between existing parties in the TCA Registry. You can choose to create relationships from three pages:

- **Overview:** Create relationships with a relationship type that is not displayed for the party, which would be the subject of the new relationship.
- **View Relationships:** Create relationships with any of the selected types that you are viewing for the party, which would be the subject of the new relationship.
- **Hierarchy:** Create relationships with any of the parties in the hierarchy as the subject, using the relationship type of the hierarchy.

For example, a relationship phrase pair consists of: Organization is Headquarters Of Organization, and Organization is a Subsidiary Of Organization. If you are working on the party Oracle HQ, you would create a relationship with your party as the subject party and use the appropriate relationship phrase: Oracle HQ is the headquarters of Oracle Branch.

The reverse direction of the relationship, Oracle Branch as the subsidiary of Oracle HQ, is automatically created. You would see this direction of the relationship when you view relationships for Oracle Branch.

You can create multiple relationships between the same two parties, with different relationship phrases, even if relationship date ranges overlap. To use the same relationship phrase for multiple relationships between the same two parties, however, the relationship date ranges must not overlap.

## To create relationships:

1. Navigate to the Overview page for the party that you want to create relationships for. See: Searching for Parties and Viewing Results, page 6-7.

Select the relationship type that you want to create relationships for and click the Go button. The available types that you can create relationships for exclude the types that the party is already involved in.

To create relationships with a type that the party is already involved in, you must first view the relationships within that type. This restriction ensures that you review the existing relationships for a type so that you do not create duplicate relationships.

After viewing current relationships, you select the type to create relationships for and click the Go button. The available types include only the types that you are viewing. See: Viewing Relationships, page 6-8.

**Tip:** You can also create relationships for any party in a relationship hierarchy. See: Viewing Relationship Hierarchies, page 6-11.

2. The Create Relationships page displays your selected relationship type as the type for the new relationship, and the selected party is the subject party.
3. Select a relationship phrase and object party for the relationship, with respect to the subject party.
4. Optionally change the start date of the relationship, which defaults with the current date.

If you use the current date, the relationship's start time is the system time. If not, the start time is at the beginning of the start date.

5. Optionally enter an end date.

The relationship's end time is at the end of the end date.

6. Click the Add Another Row button to create another relationship for the subject party with this same relationship type. Repeat steps 4 through 6.
7. Click the Apply button.

The confirmation takes you back to the page from where you chose to create relationships. Your new relationships are reflected in that page.

## Related Topics

Party Relationship Management Process, page 6-5

Relationships Overview, page 6-2

## Editing Relationships

Use the Edit Relationship page to edit a selected relationship for the party that you are viewing relationships for. This party is the subject party, which, along with relationship type and object party, cannot be changed. What you can update in the relationship are:

- Relationship phrase.

When you change the relationship phrase, Relationship Manager actually ends the existing relationship and creates a new one with the new phrase. The current date is the end date of the existing relationship.

- Start date.
- End date.

You can manually enter or change an end date to terminate a relationship at the current or another specified date. You can also extend a relationship by entering a later end date or removing the end date. Even relationships with an end date that already passed can be prolonged by changing or removing the end date.

Any changes that you make to the direction of the relationship with your party as the subject applies to the opposite direction of the relationship. For example, the direction you are editing is: Oracle is the employer of Joe. If you end this relationship, Joe as the employee of Oracle also ends.

**Tip:** You can also edit hierarchical relationships by moving parties within the hierarchy of a relationship type, which changes the object party. See: Updating Relationships by Moving Parties in a Hierarchy, page 6-17.

## To edit a relationship:

1. Navigate to the View Relationships page for a party with the relationships that you might want to edit. See: Viewing Relationships, page 6-8.
2. Click the Edit icon for the relationship that you want to edit.

**Note:** You can edit only relationships with the User Entered source.

3. In the Edit Relationship page, change the relationship phrase, start date, end date, or any combination of the above.
4. Click the Apply button.

The confirmation takes you back to the View Relationships page, where you can see the results of your changes.

## Related Topics

Party Relationship Management Process, page 6-5

Relationships Overview, page 6-2

## Viewing Relationship Hierarchies

Use the Hierarchy page to view a structured hierarchy of the relationships in a given hierarchical relationship type. For example, you get a visual representation of how a corporate structure is set up.

Your selected party is the root at the top of the hierarchy. You can see its children, or parties ranked lower in relationships, but not its parents.

The hierarchy represents a structure of relationships for the date that you specify in the As Of field. The hierarchy displays all relationships that fit both of these criteria:

- The start date is before or the same as the as of date.
- The end date is after the as of date, or no end date exists.

This table shows an example of three relationships and their date ranges.

Relationship	Start Date	End Date
A	January 1	January 10

Relationship	Start Date	End Date
B	January 10	January 30
C	January 15	None

This table shows examples of which relationships the hierarchy would display depending on the date in the As Of field.

As Of	Included Relationships
January 1	A
January 10	B
January 15	B and C
January 30	C

For each node in the hierarchy, Relationship Manager displays the party's:

- Name and Registry ID
- Relationship phrase with respect to its parent party
- Parent party name

If you have batch loaded data or acquired the Enterprise Management GDP through online purchase, you can also view the corporate hierarchy that D&B provides. See: D&B Hierarchy, page 6-13.

### To view a relationship hierarchy:

1. Navigate to the Overview page for the party that you want to view relationship hierarchies for. See: Searching for Parties and Viewing Results, page 6-7.

**Note:** Search for and select the party that you want as the highest level, or root, in the hierarchy.

2. Click the Hierarchy icon for the relationship type that you want to view. Hierarchies are available only for hierarchical relationship types.

3. Enter the date that you want to view the hierarchy for in the As Of field and click the Go button. By default, the hierarchy is displayed for the current date.
4. To view the relationships within the hierarchy, click the arrows to expand or collapse levels.

**Tip:** You can click the Focus icon for the party that you want to view as the root of the hierarchy. Clicking the name of any party in the hierarchy displays the party's overview information and does not render that party as the root of the hierarchy.

5. Click the Details icon for the party that you want to view additional information for, if available.
6. Repeat steps 3 to 5 as needed.
7. From the Hierarchy page, you can choose to:
  - Select parties and move them under another party within the same hierarchy, page 6-17.

**Note:** You cannot update the D&B hierarchy by moving parties within the hierarchy.

- Create relationships for any party in the hierarchy., page 6-8

## Related Topics

Party Relationship Management Process, page 6-5

Relationships Overview, page 6-2

## D&B Hierarchy

The D&B hierarchy contains hierarchical corporate relationships that D&B provides through the Enterprise Management global data product (GDP). To access this hierarchy, you select the D&B Hierarchy relationship type, which includes the following relationship phrase pairs:

- Parent Of and Subsidiary Of
- Headquarters Of and Division Of
- Domestic Ultimate Of and Domestic Subsidiary Of

- Global Ultimate Of and Global Subsidiary Of

The Domestic Ultimate is the highest ranking entity within a country, while the Global Ultimate is the uppermost entity within the global corporate hierarchy. D&B creates a reporting structure from the lowest level of a corporate hierarchy to the Global Ultimate, providing a complete hierarchical organization structure.

When you purchase the Enterprise Management GDP for any entity, D&B provides a hierarchy containing all the related parents up to the Global Ultimate, but not other entities on the same or lower levels. For example, if you purchase data for a headquarters, then the provided hierarchy includes its Domestic and Global Ultimate, but not its branches or other headquarters reporting to the same Domestic or Global Ultimate. When you subsequently purchase the GDP for entities on the same or lower levels, then the hierarchical links to the original entity are established.

The structure of the D&B hierarchy depends on many additional factors, including the countries that the entities are in, the entity that you purchase the D&B data for, and so on. For more clarification and illustrations of other rules and regulations, see: D&B Hierarchy Examples, page 6-14.

**Important:** Do not use the Create Relationship API to create D&B hierarchy relationships. See: Create Relationship API, *Oracle Trading Community Architecture Technical Implementation Guide*.

## Related Topics

Viewing Relationship Hierarchies, page 6-11

Data Products, page 4-3

## D&B Hierarchy Examples

These examples illustrate how the information that you acquire from D&B appear in Relationship Manager as the D&B hierarchy.

### Example 1

In this example, you purchase D&B data for a branch, which has its headquarters within the same country. This table shows the information that you acquire from D&B, including the corporate structure with respect to the branch.

Name	Role	Country
Vision Global	Global Ultimate	Japan
Vision US	Domestic Ultimate	US

Name	Role	Country
Vision HQ	Headquarters	US
Vision Branch	Branch	US

With the information that you acquire from D&B for the branch, Relationship Manager displays the D&B hierarchy as shown in this table:

Hierarchy Level	Name	Relationship Phrase	Parent Name
1	Vision Global	None	None
2	Vision US	Global Subsidiary Of	Vision Global
3	Vision HQ	Domestic Subsidiary Of	Vision US
4	Vision Branch	Division Of	Vision HQ

The Global Ultimate is always at the top of a D&B hierarchy, no matter which country it is in. The Domestic Ultimate is displayed above the headquarters because they are in the same country, and the Domestic Ultimate is the highest ranking within a country. The Domestic Ultimate is always in the same country as the entity that you purchase D&B data for, by definition.

### Example 2

In this example, you purchase D&B data for a branch, which has its headquarters in another country. This table shows the information that you acquire from D&B, including the corporate structure with respect to the branch.

Name	Role	Country
XYZ Global	Global Ultimate	US
XYZ US	Domestic Ultimate	US
XYZ HQ	Headquarters	Japan
XYZ Branch	Branch	US

With the information that you acquire from D&B for the branch, Relationship Manager displays the D&B hierarchy as follows in this table:

Hierarchy Level	Name	Relationship Phrase	Parent Name
1	XYZ Global	None	None
2	XYZ US	Global Subsidiary Of	XYZ Global
2	XYZ HQ	Global Subsidiary Of	XYZ Global
3	XYZ Branch	Division Of	XYZ HQ

The Domestic Ultimate and headquarters are displayed on the same level in the hierarchy because they do not necessarily have any relationship to each other. In the previous example, they are in the same country, so the Domestic Ultimate ranks higher by default. In this example, they are in different countries.

The branch appears only as a child of the headquarters, not also of the Domestic Ultimate, because the reporting structure is based on the headquarters/division and parent/subsidiary relationships only. The Global and Domestic Ultimates do appear in the hierarchy with respect to the entity that you purchased D&B data for.

### Example 3

In this example, you purchase D&B data for Vision HQ from Example 1, which also has its headquarters in the same country. This table shows the information that you acquire from D&B, including the corporate structure with respect to Vision HQ as the branch.

Name	Role	Country
Vision Global	Global Ultimate	Japan
Vision US	Domestic Ultimate	US
Vision Parent	Parent	US
Vision HQ	Subsidiary	US

With the information that you acquire from D&B first for Example 1 and then 3, Relationship Manager displays the D&B hierarchy as follows in this table:

Hierarchy Level	Name	Relationship Phrase	Parent Name
1	Vision Global	None	None
2	Vision US	Global Subsidiary Of	Vision Global
3	Vision Parent	Domestic Subsidiary Of	Vision US
4	Vision HQ	Subsidiary Of	Vision Parent
5	Vision Branch	Division Of	Vision HQ

As you subsequently purchase more D&B data for other entities within the Vision corporate hierarchy, you accordingly fill out its D&B hierarchy and establish more concrete reporting relationships with the hierarchy.

## Updating Relationships by Moving Parties in a Hierarchy

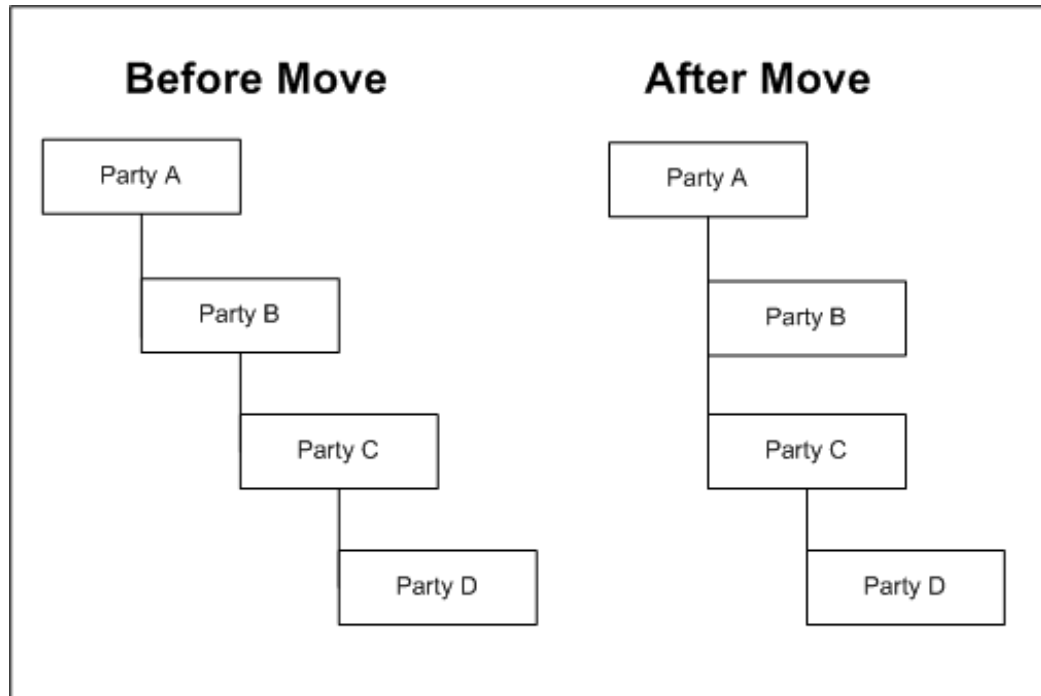
Use the Hierarchy and Move Parties pages to move selected parties within a hierarchy, accordingly updating affected relationships. You can select one or more parties that you want to move under a new parent in the same hierarchy. The parties that you move and the new parent can be on any level of the hierarchy.

Each move ends the existing relationship and creates a new one based on the new structure in the hierarchy. The current date is the end date of the existing relationship as well as the start date of the new relationship.

**Note:** If you need to change start or end dates after moves, use the Edit Relationships page. See: Editing Relationships, page 6-10.

For example, the current hierarchy has Party A as the parent of Party B, which is the parent of Party C, which is the parent of Party D. You move Party C and select Party A as its new parent. This move ends the relationship for Party B as the parent of Party C and creates a new relationship for Party A as the parent of Party C. Party D moves along with Party C and remains a child of Party C.

This diagram shows the hierarchy before and after the move:



The relationship phrase of the moved relationship stays the same with respect to parties that you move. For example, if Party C was a subsidiary of Party B, it would then be the subsidiary of Party A, and Party D is still a subsidiary of Party C.

#### To update relationships by moving parties in a hierarchy:

1. Navigate to the Hierarchy page for the hierarchy that you want to view and manage. See: Viewing Relationship Hierarchies, page 6-11.

**Important:** To ensure accurate results when you move parties, use the current date as the as of date. All moves are based on the hierarchy as it is today.

2. Select the party or parties that you want to move and click the Move button.

**Note:** You cannot move parties with the relationship start date in the future.

3. In the Move Parties page, expand the hierarchy as necessary to find the new parent party.
4. Select the new parent party and click the Apply button.

The confirmation takes you back to view the results of your move in the updated

relationship hierarchy.

## **Related Topics**

[Viewing Relationship Hierarchies, page 6-11](#)



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## Batch Duplicate Identification

This chapter covers the following topics:

- Batch Duplicate Identification Overview
- Defining Duplicate Identification Batches
- Reviewing Duplicates and Creating Merge Batches
- Submitting Merge Batches

### Batch Duplicate Identification Overview

Although Oracle E-Business Suite applications share the same TCA Registry, each application uses TCA differently depending on the context and need for particular party information. Each application must quickly, accurately, and consistently retrieve information from the TCA Registry for transaction processing. Duplicate data in the Registry can reduce the efficiency and accuracy of party processing and reports.

To resolve duplicates, you can use batch duplicate identification to find duplicate parties that already exist in your TCA Registry and select the parties that you want to merge. The batch duplicate identification process compares all records for each party. For example, each contact point for a party is compared against all contact points.

Batch duplicate identification is powered by Data Quality Management (DQM) functionality. Your administrator can set up batch duplicate identification. See: *Setting Up Batch Duplicate Identification, Oracle Trading Community Architecture Administration Guide* and *Data Quality Management Overview, Oracle Trading Community Architecture Administration Guide*.

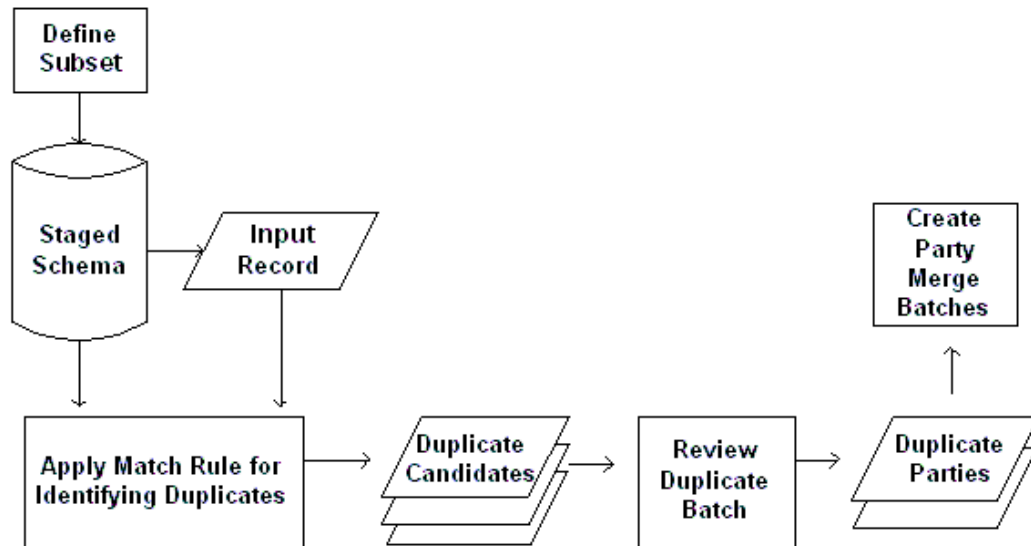
### Process Overview

The batch duplicate identification process involves:

- Defining and submitting a duplicate identification batch, page 7-3.

- Review duplicate candidates and create merge batches from the duplicate identification batch, page 7-5.
- Submit merge batches to Party Merge, page 7-9.

This diagram illustrates the process in more detail:



1. In the Submit Duplicate Identification Batch window, define a duplicate identification batch, which can consist of a subset of parties. Specify whether to compare the parties against one another or against all parties.
2. From the same window, run the DQM Duplicate Identification program, which searches for duplicates of the batch that you defined. The batch provides the input records that the staged schema matches against.
3. The DQM Duplicate Identification program applies the match rule in the Submit Duplicate Identification Batch window to identify duplicates.
4. The Duplicate Identification: Batch Review window displays the duplicate candidates for your batch.
5. Review the results for your duplicate identification batch and use the Match Details window to see more information about the matches.
6. In the Duplicate Identification: Batch Review window, specify the duplicate parties that you want to merge from and to and indicate which parties you do not want to be identified as duplicates in the future.
7. In the same window, create a merge batch with the parties that you want to merge. Use the Review Party Merge Batches window to submit merge batches to Party

Merge for the actual merge process. See: Party Merge Overview, page 8-1.

## Related Topics

Using Oracle Trading Community Architecture, page 1-5

## Defining Duplicate Identification Batches

Use the Submit Duplicate Identification Batch window to define and submit the batch of subset entries that you want to find duplicates for. When you submit the batch, the DQM Duplicate Identification program automatically applies the match rule from this window and scores potential duplicates.

If you do not define a subset, the DQM Duplicate Identification program compares all records in the staged schema against one another. This process can take a long time, depending on the detail of your match rule and the size of your staged schema.

Define a subset of records to compare against the rest of the staged schema or against one another, for two reasons:

- To save time
- If you are familiar with the contents of the TCA Registry, for example, if you know about a new influx of data in a specific date range or records that were created by a particular application or individual

You can select up to ten conditions to define the subset, using any of the attributes from the HZ\_PARTIES table. You can also manually enter SQL statements to define the subset.

After the DQM Duplicate Identification program finishes, the results are displayed in the Duplicate Identification: Batch Review window.

### To define and submit a duplicate identification batch:

1. Navigate to the Submit Duplicate Identification Batch window.
2. Enter a name for the duplicate identification batch in the Batch Name field.
3. Select a match rule from the list of values to use for identifying and scoring duplicates in the Match Rule field. The match rule defaults from the DQM Match Rule for Batch Duplicate Identification profile option, if defined.

Even if the selected match rule is allowed for Automerger, the Automerger feature is not integrated with batch duplicate identification.

**Note:** Use a match rule with the Bulk Duplicate Identification type

if you want to identify only records that are almost exact duplicates. Match rules with Simple Duplicate Identification type provide fuzzier matches.

4. In the Number of Workers field, enter the number of parallel workers that you want to use to improve performance.

Workers are processes that run at the same time to complete a task that would otherwise take longer with a single process. The default number of workers is 1, and you cannot use more than ten workers.

5. Uncheck the Match within Subset check box if you want to compare the subset against the entire staged schema for duplicates.

By default, the records in the subset are only compared against one another.

6. Check the Find Merged Parties check box if you want to include parties that were previously merged in the search.

7. Navigate to the Define Subset region.

8. In the Attribute fields, select attributes from the list of values that you want to define the subset with.

9. For each attribute, select a condition:

- Equal To
- Greater Than
- Less Than
- Starts With

10. In the Value fields, enter a value for each attribute and condition.

For example, if you enter 1001 for the Party Number attribute with a less than condition, the subset includes only parties with a number of 1000 or lower.

11. In the SQL Clause text box, you can manually add to the corresponding SQL clauses that are automatically generated when you define subset conditions. Alternatively, you can enter SQL statements instead of selecting attributes and conditions in the previous fields.

12. Press the Submit Batch button.

The DQM Duplicate Identification program runs to identify duplicates for the subset of records that you defined, using the match rule that you specified.

## Related Topics

Batch Duplicate Identification Overview, page 7-1 Submitting the Merge Process, page 9-15

## Reviewing Duplicates and Creating Merge Batches

Use the Duplicate Identification: Batch Review window to review the potential duplicates that the DQM Duplicate Identification program found and create a merge batch that consists of parties that you want to merge. For the subset that you defined for the duplicate identification batch, the Duplicate Identification: Batch Review window displays parties with matches as merge-to parties and their potential duplicates as merge-from parties. A merge-from party would be merged into the merge-to party during the party merge process.

You can use the Match Details window to see the reasons why the DQM Duplicate Identification program selected any pair of merge-to and merge-from parties as duplicate candidates. This information helps you determine whether the parties are in fact duplicates or not.

After you evaluate a pair of duplicate candidates, you can:

- Switch the merge-from party to the merge-to party and the merge-to party to the merge-from party.
- Mark the pair as not duplicates so that the parties are not selected as candidates in the future. You can define a date range for this definition to be active.
- Determine whether to merge the pair or not. Any merge-from party with a score that exceeds the automatic merge threshold defined in the match rule is defaulted to be merged into the merge-to party. You can override this default.

When you finish evaluating a batch, you can create a merge batch with all the duplicate pairs of parties that you select for merge.

**Note:** After you become familiar with DQM, you might choose to trust your match rules and submit a merge batch with the results of the DQM Duplicate Identification program without evaluating each duplicate candidate.

## Prerequisites

- ☐ Before you can review potential duplicates and define merge batches, you must use the Submit Duplicate Identification Batch window to define a duplicate identification batch and run the DQM Duplicate Identification program on that batch. For more information, see: Defining Duplicate Identification Batches, page 7-

3.

**To review duplicates and define merge batches:**

1. Navigate to the Duplicate Identification: Batch Review window.
2. Query the duplicate identification batch that you want to review.

For the batch, the window displays the information shown in this table:

Field	Value
Batch Name	The name of the duplicate identification batch.
Match Rule	The match rule that the DQM Duplicate Identification program used to match and score duplicate candidates.
Creation Date	The date that the duplicate identification batch was created.
Match Threshold	The match threshold defined in the match rule. Records with a score that exceeds the match threshold are selected as matches, or potential duplicates.

In the Merge-To Parties region, the Duplicate Identification: Batch Review window displays the information shown in this table for each merge-to party:

Field	Value
Name	The party name
Number	The party number
Identifying Address	The party identifying address
Duplicates	The number of potential duplicates, or merge-from parties

In the Merge-From Parties region, the window displays all the duplicate candidates for the selected merge-to party. For each potential duplicate, you can see the information shown in this table:

Field	Value
Name	The party name.
Number	The party number.
Identifying Address	The party identifying address.
Score	The match score, which signifies how closely the merge-from party matches the merge-to party. The score is the sum of scores that the match rule assigns to attribute matches between the two parties. The match score must exceed the match threshold of the match rule for the party to be selected as a merge-from party.
Merge	Yes or no to indicate whether to merge the party into the merge-to party or not. The default of this value depends on the automatic merge threshold of the match rule. A party with a match score that exceeds the threshold is defaulted to be merged.

3. To view information about why a pair of merge-to and merge-from parties was designated as a potential duplicate match, select the merge-to and merge-from party in the window.
4. Press the View Match Details button. The Match Details window appears. The window shows again the name, number, and address of the merge-from and merge-to parties.

The window also displays the information shown in this table:

Field	Value
Matched Attribute	The attribute that matches in both parties according to the match rule definitions.
Merge-From Party Value	The value of the matched attribute from the merge-from party.

Field	Value
Merge-To Party Value	The value of the matched attribute from the merge-to party.
Score	The score that the match rule assigns to the merge-from party for the particular attribute match to the merge-to party. The sum of these scores makes up the total match score of the merge-from party.

5. To view attribute match details between the same merge-to party and another merge-from party, select another merge-from party in the list of values for the Merge-From field.
6. Press the Close button when you finish viewing match details for the selected merge-to party.
7. Repeat steps 3 to 6 for each merge-to party that you want to view match details for.
8. To switch the selected merge-from party to a merge-to party and vice versa, select a merge-to party in the Duplicate Identification: Batch Review window.
9. Press the Change Merge-To Party button and select the merge-from party that you want to replace the selected merge-to party.  
Alternatively, you can use the list of values from the Merge-To Parties Name field to change the merge-to party.
10. For each merge-from party, specify in the Merge option whether to merge into the merge-to party or not. You can accept the defaults or, based on your evaluation, select not to merge parties that were defaulted for merge.

**Note:** You can only override Merge options that are set to *Yes*.

11. If you want to specify that a merge-from party is not a duplicate match for the merge-to party, select the merge-from party and check the Not Duplicate of Merge-To Party check box.

**Note:** You can only select merge-from parties with the Merge option set to *No*.

12. You can optionally enter or remove the end date for the merge-from party not to be

selected as duplicate of that specific merge-to party.

13. When you finish evaluating the batch, press the Create Merge Set button to create a merge batch that consists of merge-from parties with the Merge option set to *Yes* and their corresponding merge-to parties.

The Review Party Merge Batches window automatically appears for the next procedure of submitting the sequence of parties in the batch to Party Merge. For more information, see: Submitting Merge Batches, page 7-9.

If you decide later to change the Merge option to *No* for some parties in this batch, you can still do so in the Duplicate Identification: Batch Review window as long as you have not yet submitted the merge batch to Party Merge.

## Related Topics

Batch Duplicate Identification Overview, page 7-1

## Submitting Merge Batches

Use the Review Party Merge Batches window to submit merge batches to Party Merge. Party Merge is the Oracle Trading Community Architecture feature that performs the actual merging of parties. The Review Party Merge Batches window displays all the merge batches that you created from a specific duplicate identification batch.

For each merge batch, the window also displays the pairs of parties to be merged and the sequence in which they are submitted. DQM automatically determines the sequence when you create the merge batch to ensure that parties are successfully submitted and merged.

For example, if you are merging party A to party B, and party B to party C, you must merge party A to B before merging B to C. If you merge party B to C first, party B does not exist any more for party A to merge into.

## Prerequisites

- ☐ Before you can submit merge batches to Party Merge, you must create a merge batch for the selected duplicate identification batch. For more information, see: Reviewing Duplicates and Creating Merge Batches, page 7-5.

### To submit merge batches:

1. Navigate to the Review Party Merge Batches window.

The window automatically appears when you create a merge batch. Otherwise, navigate to the Duplicate Identification: Batch Review window, query the duplicate identification batch that you want to submit merge batches for, and press the View Merge Set button.

2. You can change the merge batch names in the Party Merge Batch field if you want.

The default names consist of the original duplicate identification batch name and a sequential number. For example, the first merge batch that you create with duplicate identification batch ABC is named 1-ABC. The second merge batch is called 2-ABC, and so on.

The Status field displays the status of the merge batch:

- **Ready to Submit:** This batch is the one that is submitted when you press the Submit Party Merge Batch button.
- **In Queue:** This batch is in the queue for submission.
- **Pending:** This batch has been submitted to Party Merge.
- **Partially Complete:** This batch has been partially merged with success in Party Merge.
- **Complete:** This batch has successfully merged in Party Merge.

For each merge batch, the Merge Batch Parties region displays the names and numbers of all the merge-from and merge-to parties, in the default sequence that the pairs will be submitted.

3. Press the Submit Party Merge Batch button to submit the batch with the Ready to Submit status.

**Note:** You must submit batches in the order that they are displayed.

When the submission successfully completes, the status for the batch changes to Pending and the next batch gets the Ready to Submit status.

4. To continue to the Party Merge process, press the Go To Party Merge button. The Merge Parties window automatically appears for the selected merge batch.

**Note:** You can only select merge batches with a Pending status for Party Merge.

When the actual Party Merge process is run on a merge batch, the concurrent request number of the process is displayed in the Request ID field of the Review Party Merge Batches window.

## Related Topics

Party Merge Overview, page 8-1

Batch Duplicate Identification Overview, page 7-1

Submitting the Merge Process, page 9-15



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## Party Merge

This chapter covers the following topics:

- Party Merge Overview
- Creating Merge Batches
- Merging Parties
- Merging Party Sites of a Party
- Processing Merge Batches
- Reviewing the Party Merge Log
- Party and Customer Account Merge

### Party Merge Overview

Party Merge provides the capability to merge parties and their related entities in the TCA Registry, eliminating duplicate data in the Registry. Because the TCA Registry shares information across the E-Business Suite, you must maintain the quality of the data in the Registry. Duplicate data can reduce the efficiency and accuracy of your party processing and reports.

With Party Merge, you can:

- Consolidate duplicate parties or party sites.

For example, you can merge Vision Corp. into Vision Corporation.

- Merge duplicate party sites for a party.

**Note:** Even though you can also use Party Merge to integrate an acquired party into the acquiring party, Party Merge is primarily for finding and resolving duplicates. Before using Party Merge for mergers and acquisitions, you must fully test and prepare for the results of

merging.

For example, after merge, all existing transactions are repointed to the surviving party. You cannot reconcile transactions or audit transactions details for the acquired party, or reprint invoices for that party. If you still need to perform various tasks for the acquired party, you might not want to merge it into the acquiring party.

In Party Merge, merge batches are sets of parties or party sites to merge, and the Party Merge process runs on one merge at a time. A merge batch determines the records involved in the merge as well as the general outcome of the merge.

When you submit parties or party sites for merge, the Party Merge process runs as a concurrent request to complete the actual merge. You can review the log to check the results and any errors that might have occurred.

To identify the duplicate parties to include in a merge batch, you can:

- Use batch duplicate identification to automatically find batches of duplicates. See: *Batch Duplicate Identification Overview*, page 7-1.
- Manually determine and enter the duplicates into merge batches in Party Merge.

In addition to Party Merge, you can use the Customer Account Merge feature to merge transactions from a source customer account to a target customer account. After the merge-from account is merged into the merge-to account, you can either inactivate or delete the source customer account. See: *Merging Customers*, page 9-1.

Your administrator can set up Party Merge. See: *Setting Up Party Merge, Oracle Trading Community Architecture Administration Guide*.

## Party Merge Process

The Party Merge process involves four procedures to resolve duplicate parties and party sites in the TCA Registry:

1. Creating the merge batch, page 8-11.
2. Processing the merge batch, page 8-17.
3. Reviewing the Party Merge log, page 8-18.
4. Identifying types of errors, page 8-20.

## Related Topics

Party Merge Details, page 8-3

Impact on Source IDs, page 8-8

Impact on D&B Data, page 8-10

Party and Customer Account Merge, page 8-20

Using Oracle Trading Community Architecture, page 1-5

## Party Merge Details

In Party Merge, the merging parties are referred to as the merge-from party and the merge-to party, or the source and the target respectively. After the merge-from party is merged into the merge-to party, you can delete the merge-from, or source, party. By default the merge-from party is set to a Merged status.

The related child entities that get merged or transferred include party relationships, contact information, party profiles, customer accounts, and information obtained from third-party sources. For more information about what information is merged or transferred, see: Duplicate Checking, page 8-5.

## Merging Parties or Party Sites

You can merge parties or party sites that belong to a party. You cannot merge party sites between parties, however, until you merge the parties that they belong to. Before the Party Merge process begins, you can choose to delete the merge-from party when the process ends. If you merge party sites for the same party, you cannot choose to delete the merge-from party because the merge-from and merge-to parties are the same party.

Deleting a party changes its status to Deleted. You cannot retrieve a deleted party in any search or transaction window unless the application is specifically designed to include deleted parties in any query results.

**Note:** If the merge-from and merge-to party have extended TCA attributes, only the attributes of the merge-to party are retained after the merge. See: *Administering Extensions, Oracle Trading Community Architecture Administration Guide*.

## Details on Transferring Party Sites

If a merge-from and merge-to party site are not duplicates, the merge-from party site is essentially transferred to the merge-to party. The actual process, however, involves a copy and merge, for legal auditing requirements.

1. A copy of the merge-from party site is created for the merge-to party.
2. The merge-from party site is then merged with that copy.
3. The merge-from party and party site have the Merged status.

For example, this table shows the parties before the merge, with two party sites that are

not duplicates.

From Party Name	From Party Site	To Party Name	To Party Site
Vision1	500 Vision Parkway	Vision2	100 Vision Parkway

During the merge, a copy of 500 Vision Parkway is created for Vision2, so both parties now have duplicate party sites. As with all duplicate party sites, the 500 Vision Parkway site from Vision1 is merged into the copied site of Vision2. After the merge, both Vision1 and the original 500 Vision Parkway have a Merged status.

### Merging Persons or Organizations

You can merge Person or Organization party types. You can, however, only merge parties with the same party type. This implies that an organization can only be merged with another organization, a person with a person, and so on.

### Merging Entities from Other Applications

You must process and merge or appropriately transfer other Oracle Applications information of the duplicate party, such as transactions and attributes, into the merge-to party. Before using the Party Merge feature, your administrator must register all applications and entities that interact with Oracle Trading Community Architecture to ensure that all transaction and attributes are merged when the party is merged. See: *Merge Dictionary Overview, Oracle Trading Community Architecture Administration Guide*.

### Related Topics

Party Merge Overview, page 8-1

### Party Merge Example

This example of a party merge shows both the before and after conditions.

ABC Company has implemented the Oracle Applications E-Business Suite. While checking the quality of its data, ABC Company determines that duplicate records exist for a party, Vision Corporation. Data for this party were entered into the database under the names Vision Corp. and Vision Inc. Using Party Merge, ABC Company plans to merge the two Vision parties.

#### Before the Merge

This table shows the from and to parties and their party sites.

From Party Name	From Party Site	Site Use	To Party Name	To Party Site	Site Use
Vision Corp.	500 Vision Parkway	<ul style="list-style-type: none"> <li>• Bill-to</li> <li>• Ship-to</li> <li>• Marketing</li> </ul>	Vision Inc.	100 Vision Parkway	Bill-to
	600 Vision Parkway	<ul style="list-style-type: none"> <li>• Bill-to</li> <li>• Ship-to</li> </ul>		600 Vision Parkway	Ship-to

The 600 Vision Parkway party site exists for both parties and is considered to be duplicated.

#### **During the Merge**

The party site 500 Vision Parkway is transferred to Vision Inc. The details of 500 Vision Parkway, for example the bill-to, ship-to, and marketing party site uses stay with the party site.

The party site 600 Vision Parkway is merged with 600 Vision Parkway on Vision Inc. The bill-to site use is transferred because it does not exist for Vision Inc. The ship-to site use is merged because it already exists for Vision Inc.

#### **After the Merge**

##### **Vision Corp.**

- Vision Corp. is set to a status of Merged.
- The party site 600 Vision Parkway is set to a status of Merged.
- The ship-to party site use for 600 Vision Parkway is set to a status of Merged.

##### **Vision Inc.**

Vision Inc. has three party sites:

- 100 Vision Parkway with a bill-to site use.
- 500 Vision Parkway with a bill-to, ship-to, and marketing site use.
- 600 Vision Parkway with a bill-to and ship-to site use.

## **Duplicate Checking**

In Party Merge, you can either merge or transfer the child entities that belong to the

merge-from party. These entities can include party sites, contacts, relationships, and profile information. The merge procedures automatically handle the merge or transfer of other child entities.

Below are some of the TCA entities and the rules that are applied to them to determine whether the entities should be merged or transferred. In general, if the Party Merge process determines that the entities are exact duplicates based on the concatenation of table columns, the merge-from record will be merged with the merge-to record. If the entities are not exact duplicates, the merge-from entity is transferred to the merge-to entity.

## **Contact Points and Preferences**

The contact points and preferences, which determine whether the entities should be merged or transferred are as follows:

### **Contact Points**

You must transfer contact points unless they are exact duplicates. Only exact duplicates are merged.

Contact points can point to a party site. These contact points are transferred or merged the way that the contact points are at the party level.

### **Contact Preferences**

Contact preferences are always merged.

## **Customer Accounts and Related Information**

The customer information, which determines whether the entities should be merged or transferred are as follows:

### **Customer Accounts**

Customer accounts are transferred to the merge-to party. After the parties are merged, you can use the Customer Merge program to merge customer accounts. This is a separate process that requires a separate concurrent request. See: *Merging Customers*, page 9-1.

### **Customer Account Sites**

Customer account sites are related to party sites. How customer account sites are merged depends on how the party site is processed.

- **Party site merge:** The customer account site must be modified to point to the existing merge-to party site.
- **Party site transfer:** The customer account site should point to the merge-from party site, which now points to the merge-to party.

### Roles in a Customer Account

Each role in a customer account points to a party. A customer account role can be processed during the Party Merge process in either of these situations:

- The role points to the merge-from party. In this case, the role must be modified to point to the merge-to party.
- The role points to an organization contact or other relatable party relationship. This relationship is being merged or transferred as the relationship's subject or object in a party merge.

### Customer Contact Points

Customer contact points point to party-level contact points. The customer contact point refers to the merge-to contact point on the merge-to party. This contact point is either a pre-existing contact point for the merge-to party or a contact point that has been transferred from the merge-from party.

### Additional Party Information

If the duplicate check procedure identifies the following as exact duplicates, these entities are merged, otherwise they are transferred. The additional party information depends on whether the party is an organization, person, or either.

#### When the Party is an Organization

If the duplicate check procedure identifies the following as exact duplicates, they are merged.

- **Financial Numbers:** If there is a duplicate financial number in the merge-to party's financial report data, that financial number is merged with the duplicate.
- **Financial Reports:** The procedure checks for duplicates in the HZ\_FINANCIAL\_REPORTS table.
- **Industrial Reference:** The procedure checks for duplicates in the HZ\_INDUSTRIAL\_REFERENCE table.
- **Organization Indicators:** The procedure checks for duplicates in the HZ\_ORGANIZATION\_INDICATORS table.
- **Securities Issued:** The procedure checks for duplicates in the HZ\_SECURITY\_ISSUED table.

#### When the Party is a Person

If the duplicate check procedure identifies the following as exact duplicates, they are merged.

- **Citizenship:** The procedure checks for duplicates in the HZ\_CITIZENSHIP table.
- **Education:** The procedure checks for duplicates in the HZ\_EDUCATION table.
- **Employment History:** The procedure checks for duplicates in the HZ\_EMPLOYMENT\_HISTORY table.
- **Person Interest:** The procedure checks for duplicates in the HZ\_PERSON\_INTEREST table.
- **Person Language:** The procedure checks for duplicates in the HZ\_PERSON\_LANGUAGE table.
- **Work Class:** The procedure checks for duplicates in the HZ\_WORK\_CLASS table.

#### When the Party is Either an Organization or a Person

If the duplicate check procedure identifies the following as exact duplicates, they are merged.

- **Certifications:** The procedure checks for duplicates in the HZ\_CERTIFICATIONS table.
- **Credit Ratings:** Credit ratings are always transferred unless the application providing the credit rating information has a duplicate check in its merge procedures.
- **Financial Profiles:** The procedure checks for duplicates in the HZ\_FINANCIAL\_PROFILE table.
- **References:** The procedure checks for duplicates in the HZ\_REFERENCES table.

#### Related Topics

Party Merge Overview, page 8-1

#### Impact on Source IDs

A party can have mappings to the source systems that the record originated from. A source ID is the ID of that record in the original system. For example, the Oracle party has the ID 12345 in the Gorman source system. When this Oracle record is imported from Gorman into the TCA Registry, 12345 becomes the source ID. See: Source Systems Overview, *Oracle Trading Community Architecture Administration Guide*.

When you merge two parties with source IDs, the IDs of the merge-from party are transferred to the merge-to party. If multiple source IDs from the same source system are not allowed to map to one TCA record, then only the merge-to party's mapping is kept active.

**Note:** D&B is the one source that can never be set to allow multiple mappings to one TCA record.

For example, this table shows source system mapping records for the Oracle 1 and Oracle 2 parties. The Gorman source system was set to allow multiple mappings from that source. As always, D&B allows only one source ID to map to a party.

Party	Source System Name	Source ID	Status
Oracle 1	Gorman	10001	Active
Oracle 1	D&B	22222	Active
Oracle 2	Gorman	10002	Active
Oracle 2	D&B	33333	Active

This table shows the result of Oracle 1 merging into Oracle 2.

Party	Source System Name	Source ID	Status
Oracle 1	Gorman	10001	Inactive
Oracle 1	D&B	22222	Inactive
Oracle 2	Gorman	10001	Active
Oracle 2	Gorman	10002	Active
Oracle 2	D&B	33333	Active

The Oracle 1 mapping record for Gorman is inactivated, and a new mapping record is created for Oracle 2 and source ID 10001. Because a party can have multiple mappings to Gorman, Oracle 2 ends up with the mapping transferred from Oracle 1.

The mapping to D&B from Oracle 1 is inactivated and does not transfer over to Oracle 2 because a party cannot have multiple mappings to D&B. Oracle 2 remains with the same mapping to D&B, before and after the merge.

## Related Topics

Party Merge Overview, page 8-1

## Impact on D&B Data

Oracle Trading Community Architecture lets you purchase data from D&B's global business databases. Information purchased from D&B is stored in the party tables at the party level and is also merged with other party information when you run Party Merge.

Party Merge resolves and merges D&B data for the merge-from and merge-to parties, and retains as much of the D&B data about the parties as possible. When two parties with D&B data are merged, these situations might arise:

- **D-U-N-S Numbers Are Different:** If the D-U-N-S Numbers for the merge-from and merge-to parties are not the same number, the data for the merge-to party is retained. The D&B data for the merge-from party is set to the Merged status.
- **D-U-N-S Numbers Are the Same:** If the D-U-N-S Numbers for the merge-from and merge-to parties are the same number, the latest D&B data, whether for the merge-from or merge-to party, is retained. If the latest D&B data is stored for the merge-from party, that data overwrites the D&B data stored for the merge-to party.
- **No D&B Data Exists for the Merge-To Party:** If D&B data exists for the merge-from party but not the merge-to party, the D&B data for the merge-from party transfers to the merge-to party as a result of the merge process.
- **Merge-From Party is a Branch of Merge-To Party:** If the merge-to party is the headquarters for the merge-from party, which is a branch, and the merge-to party contains the D&B data, this data is retained. The status of the merge-from party is set to Merged.
- **Merge-From Party is the Headquarters of Merge-to Party:** If the merge-from party is the headquarters and the merge-to party is its branch, the D&B data for the merge-from party is copied to the merge-to party. The merge-to party becomes the headquarters. All branches associated with the merge-from party now belong to the merge-to party.

## Related Topics

Third Party Data Integration Overview, page 4-1

Introduction to D&B, page 4-3

Party Merge Overview, page 8-1

## Creating Merge Batches

Use the Merge Batch window to set up a merge batch for the parties or party sites that you are merging. See:

- Merging Parties, page 8-12
- Merging Party Sites of a Party, page 8-16

You can only merge parties of the same party type. You can merge or transfer party sites, organization contacts, party relationships, and profiles related to a party. All other entities related to a party are either always merged or always transferred based on the merge procedures defined for that entity.

When you select a party as the merge-from or merge-to party in a batch, the records for that party are locked and cannot be selected as a merge candidate for this or any other batch until after this batch is submitted and processed.

**Note:** For your merge batch, you cannot include any party that is already part of a de-duplication merge request. See: Merge Requests Overview, *Oracle Customer Data Librarian User Guide*.

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

Aside from manually creating merge batches in the Merge Batch window, you can also use batch duplicate identification to automatically determine duplicate parties based on match rules. You create merge batches from the suggested duplicate candidates. See: Batch Duplicate Identification Overview, page 7-1.

In the Merge Batch window, you can specify if you want to delete the merge-from party after the merge process completes. Otherwise, the merge-from party is set to a status of Merged.

The results of the merge are saved only after the entire batch has completely processed. If one record results in error, none of the parties in the batch are merged. If you want to save the resulting party after each merge, you must create a separate batch for each pair of parties to merge.

If the merge batch creation itself results in error, review the log of the Create Merge Batch program in Standard Request Submission. After fixing the errors, you can manually rerun the Create Merge Batch program.

## Prerequisites

Before you create a merge batch, you should decide if you want to delete all of the records of the merge-from party.

## Program Parameter

Use this parameter when you submit the Create Merge Batch program to re-create a merge batch that previously resulted in error.

## Merge ID

Enter the merge ID of the merge batch that you want to re-create. Only failed merge batches are available. The merge ID is the number automatically appended to the end of the merge batch name.

## Related Topics

Party Merge Overview, page 8-1

## Merging Parties

When you create a merge batch with parties to merge, you can also define the merge of entities from the merge-from and merge-to parties, including:

- Party sites, page 8-13
- Party relationships, page 8-13
- Organization contacts, page 8-15

You can also view party profile attributes of the merge-from and merge-to parties. See: Viewing Profile Information, page 8-15.

If you used batch duplicate identification to create the merge batch, all the details of the merge-from and merge-to parties are already determined and cannot be changed. See: Batch Duplicate Identification Overview, page 7-1.

## To create a merge batch for parties:

1. Navigate to the Merge Batch window.
2. Enter a batch name that is unique and related to the parties that you are merging.
3. Enter a reason for the merge, either a predefined reason or your own.
4. Check Delete Merged Records to delete the merge-from party records after the batch merge completes. Do not check this box if you do not want to delete the merged records. These records are instead assigned a Merged status.
5. In the Party Details region, enter pairs of parties that you want to merge, including the party type and merge reason for each pair.

6. Save your work before moving on to the tabbed regions.

## Related Topics

Creating Merge Batches, page 8-11

## Merging Party Sites

You can merge party sites either within a single party or between a pair of parties that you are merging.

**Note:** If every party site address to be merged is also an account site address for the same respective party, then tax validation applies to the merge. See: Tax Validation for Merge, page 9-4.

### To merge party sites:

1. Navigate to the Party Sites tabbed region after you enter the basic merge batch information. See: Merging Parties, page 8-12 or Merging Party Sites of a Party, page 8-16.
2. Enter the from site's address and the appropriate merge operation, Merge or Transfer Party Merge.
3. If you enter the Merge operation, you must enter an address for the merge-to party site.

## Merging Party Relationships

Party relationships are binary roles between two parties, such as a partnership. You can merge or transfer relationships that the merge-from or merge-to party has, as part of the merge of the two parties. If the same party relationship exists for these two parties, the relationships are automatically selected to be merged and cannot be transferred.

**Note:** You cannot use Party Merge to merge parties of type Relationship, or to independently merge relationship records without a merge batch with at least one organization or person involved in those relationships.

### Example

If Joe is your contact at Vision Corporation, you can record this as a relationship between the person Joe and the organization Vision Corporation. This table shows details of this sample relationship.

Party ID	Subject ID	Object ID	Type of Relationship
789 (Joe, contact for Vision Corp.)	456 (Joe)	123 (Vision Corp.)	Contact Of

After reviewing your database, you might determine that Vision Corporation and Vision Inc., another party in your database, are duplicates that should be merged.

After the merge process, the contact information would be changed as shown in this table.

Party ID	Subject ID	Object ID	Type of Relationship
789 (Joe, contact for Vision Inc.)	456 (Joe)	123 (Vision Inc.)	Contact Of

### To merge party relationships:

1. Navigate to the Party Relationships tabbed region after you enter the basic merge batch information. See: Merging Parties, page 8-12.

**Note:** This tab does not show relationships in which a person is a contact, employee, or member of an organization, or any other role in the Party Contacts relationship group. For these relationships, see: Merging Organization Contacts, page 8-15.

2. For each relationship to be transferred or merged for a party, enter that relationship's subject, object, and type in the From Relationships region.

For example, if a type of relationship exists called *Subsidiary of* and Vision Manufacturing is a subsidiary of Vision Corporation, then Vision Manufacturing would be the subsidiary of Vision Corporation. Vision Manufacturing would be the subject of the relationship and Vision Corporation would be the object of the relationship.

Party relationships do not require a hierarchical relationship like a parent-child relationship. For example, party relationships defined as *Partner of*, *Colleague of*, *Competitor of*, and so on do not imply a hierarchical relationship, but you have to identify a subject and object of the relationship before you can merge relationships.

3. Enter either *Merge* or *Transfer* for the operation.

You can merge only if the same party relationship exists for the merge-from and merge-to parties.

4. Enter a relationship for the merge-to party in the To Relationships region.

## Merging Organization Contacts

You can merge organization contacts between parties that you are merging. See: Merging Parties, page 8-12.

If the same organization contact exists for the merge-from and merge-to parties, that contact is automatically selected to be merged.

### To merge organization contacts:

1. Navigate to the Org Contacts tabbed region after you enter the basic merge batch information. See: Merging Parties, page 8-12.

**Note:** This tab shows only relationships in which a person is a contact, employee, or member of an organization, or any other role in the Party Contacts relationship group. For all other relationships, see: Merging Party Relationships, page 8-13.

2. In the From Org Contact region, for each organization contact for the merge-from party, enter that contact's name and title. You can enter the type, department, and party site to identify a group of organization contacts.
3. Enter either *Merge* or *Transfer* for the operation.  
You can merge only if a similar organization contact exists for the merge-to party.
4. If you enter Merge as the operation, enter an organization contact for the merge-to party that the party in the From Org Contact region is to be merged into.

## Viewing Profile Information

For the parties that you are setting up to be merged in a merge batch, you can view the merge-from and merge-to parties' profile information. See: Merging Parties, page 8-12.

Party profile information differs depending on whether the parties to merge are organizations or people. You can see the taxpayer ID and tax registration number for both, but the date of birth for parties of type Person and the D-U-N-S Number for parties of type Organization.

### To view profile information for the merging parties:

Navigate to the Person Profiles or Org Profiles tabbed region after you enter the basic

merge batch information. See: Merging Parties, page 8-12.

For either the person or the organization, you see the profile of the merge-from party that is to be merged with the profile of the merge-to party.

## Merging Party Sites of a Party

Use the Merge Batch window to create merge batches for merging duplicate party sites within a single party. For each batch, you can include multiple parties to merge party sites for.

After the merge process, all entities associated with the merge-from party site, including customer account sites, refer to the merge-to party site.

To submit a merge for two sites of the same party, you cannot check Delete Merged Records. Checking that check box implies deleting both the merge-from and merge-to parties.

If the merge-from address is the identifying address, you must confirm that the merge-to address should be used as the identifying address to continue with the merge. If you want to merge the identifying address of a customer account, you can use Customer Account Merge to merge the account sites that point to these party sites only after you merge the party sites. See: Merging Customers, page 9-1.

### To merge party sites for the same party:

1. Navigate to the Merge Batch window.
2. Enter a batch name that is unique and related to the party for which you are merging the party sites.
3. Enter a reason for the merge, either a predefined reason or your own.
4. Make sure that Delete Merged Records is not checked.
5. In the Party Details region, enter one or more from-parties for which you want to merge the party sites, including the party type.  
  
Alternatively, you can just enter the party name or party number of your from-party in the To Party fields.
6. Check Site Merge. The To Party fields are automatically populated with information from the From Party fields.
7. Enter the reason for merging these party sites.
8. Save your work.
9. Enter all party sites to be merged in the Party Sites tabbed region. See: Merging

Party Sites, page 8-13.

The other tabbed regions are disabled.

## Related Topics

Creating Merge Batches, page 8-11

## Processing Merge Batches

After you create the merge batch to merge either different parties or party sites of the same party, you have three options to process your merge batch:

- Preview your merge batch and the outcome of the merge process before submitting the Party Merge process.
- Submit the Party Merge process immediately after entering your merge details.
- Save your work and submit the Party Merge process at a later time.

After a merge batch is successfully processed, you cannot reverse the results.

### To preview the merge batch results:

1. Create the merge batch in the Merge Batch window. For more information, see: Creating Merge Batches, page 8-11.
2. Click Preview Batch.
3. The Party Merge process runs and merges the appropriate parties and other entities, but does not save the merged records to the database. The request number is displayed in the Last Request ID field.
4. In Standard Request Submission, find the Party Merge process and preview the expected effect of the merge process on the merging parties and their entities. See: Reviewing the Party Merge Log, page 8-18.

If you query for the merge batch at this point in the Merge Batch window, the Merge Done check boxes are not checked. Even if you checked the Delete Merged Records check box, no records are deleted because the merge process is submitted in the preview mode.

### To submit the Party Merge process:

1. Create the merge batch in the Merge Batch window. See: Creating Merge Batches, page 8-11.

Optionally save the merge batch and submit it later.

2. Click Run Batch.

The Party Merge process runs and merges the appropriate parties and other entities. The entire batch must be successfully processed before the merged records are saved to the database.

The request number is displayed in the Last Request ID field.

3. In Standard Request Submission, find the Party Merge process and view the results and status of the merge process. See: [Reviewing the Party Merge Log](#), page 8-18.

If you query for the merge batch at this point in the Merge Batch window, the Merge Done check box is checked. If you checked Delete Merged Records, the merge-from parties are set to the Deleted status.

If the Party Merge process results in error, you can rerun it from Standard Request Submission after you fix the errors. See: [Identifying Types of Errors](#), page 8-20.

## Program Parameter

Use this parameter when you submit the Party Merge process to remerge a batch that previously resulted in error.

## Merge ID

Enter the merge ID of the merge batch that you want to remerge. Only failed merge batches are available. The merge ID is the number automatically appended to the end of the merge batch name.

## Related Topics

[Party Merge Overview](#), page 8-1

## Reviewing the Party Merge Log

You can use the log of the Party Merge process to review the parties and related entities affected by the process. This output file is automatically generated after you run the Party Merge process. The report body displays *Merged* or *Deleted* for each merge-from party to indicate the status of the merge-from party or party site. The report displays an error message if the Party Merge process fails.

This table shows the report headings and the corresponding values.

Heading	Value
Request ID	The request ID for your concurrent process.
Log Message	<p>The sequence of processes that run to execute the merge batch, including:</p> <ul style="list-style-type: none"> <li>• Start time of the merge</li> <li>• Batch ID</li> <li>• Batch name</li> <li>• Rule set name</li> <li>• Merge process</li> <li>• Entities merged or transferred</li> </ul>
Execution status	<p>The possible execution status combinations are:</p> <ul style="list-style-type: none"> <li>• <b>Merge batch successfully executed / Batch rollback complete:</b> This status occurs after you click Preview Batch in the Merge Batch window and the Party Merge process successfully runs without saving any merged records.  This status indicates that the merge procedures registered with the Merge Dictionary ran, the merge process completed, but the merged records were not committed to the database.</li> <li>• <b>Merge batch successfully executed / Batch commit complete:</b> This status occurs after you click Run Batch in the Merge Batch window and the Party Merge process successfully runs.  This status indicates that the merge procedures registered with the Merge Dictionary ran, the merge process completed, and the merged records were saved to the database.</li> <li>• <b>Merge batch partially completed:</b> This status indicates that some of the records in the batch did not merge successfully, but the successful records were saved to database. The log file provides details of errors and identifies the failed records. See: Identifying Types of Errors, page 8-20.</li> <li>• <b>Merge batch failed / Batch rollback complete:</b> This status indicates that the merge procedures registered with the Merge Dictionary did not run successfully, and no merged records were saved to the database. Along with this status information, the log provides details of the error and identifies the merge procedure that the error occurred in. See: Identifying Types of Errors, page 8-20.</li> </ul>

The log message displays the details of the entities that have been merged or

transferred. The entities that are merged or transferred are based on the merge procedures that were registered with the Merge Dictionary. See: Merge Dictionary Overview, *Oracle Trading Community Architecture Administration Guide*.

The entities include, but are not restricted to, parties, party sites, relationships, contacts, profiles, contact points, customer accounts, customer account sites, and so on.

In addition to these standard TCA entities, other Oracle Applications and legacy system entities can be registered with the Merge Dictionary. These entities are also merged during the Party Merge process. You can also view the details about these entities in the Party Merge Request log file.

## Related Topics

Party Merge Overview, page 8-1

## Identifying Types of Errors

The Party Merge process encounters two types of errors: data errors and procedure errors. After you fix the errors, you can resubmit the Party Merge process from Standard Request Submission. See: Processing Merge Batches, page 8-17.

### Data Errors

The Party Merge process might fail at the batch or party level if any record contains corrupt data. If the Party Merge process encounters corrupt data, the entire batch fails, and none of the parties are merged. Users should be able to correct most data errors.

### Procedure Errors

The Party Merge process can fail if any procedures were not correctly coded, registered, and tested. The Party Merge log identifies the procedure that caused the Party Merge process to fail. Procedure errors must be corrected by an application developer or administrator who has access to the error log, Merge Dictionary, and PL/SQL procedures.

## Related Topics

Reviewing the Party Merge Log, page 8-18

## Party and Customer Account Merge

Oracle Trading Community Architecture allows you to merge parties and customers, or customer accounts. You can use the Customers Merge window and the Customer Merge program to merge customer accounts. See: Merging Customers, page 9-1.

You can use the party merge Web service to merge two or more customer parties and get details of the party merge. The Party Merge Web service has two operations – the

Create Party Merge Request, to create a request for merging parties and the Get Party Merge Details to retrieve details about a party merge.

You can use the account merge Web service to retrieve details of the customer account merge. The Account Merge Web service has one operation – Get Account Merge Details to retrieve details about a customer account merge. See: Web Services Implementation Overview, *Oracle Trading Community Architecture Administration Guide*.

If you find duplicate parties, you should determine if duplicate customer accounts exist between the merge-from and merge-to parties. If you find duplicate customer accounts, duplicate parties might exist for these customer accounts. You should verify that duplicate parties exist and merge those duplicate parties.

- When two customer accounts are merged and the corresponding parties are verified as duplicates, the parties can be merged.
- When two parties are merged and the corresponding customer accounts are verified as duplicates, the customer accounts can be merged.

## Related Topics

Party Merge Overview, page 8-1

## Party and Customer Account Merge Example

ABC Company has implemented the Oracle Applications E-Business Suite. While checking the quality of its customer data, ABC Company determines that duplicate records exist for a party, Vision Corporation. Data for this party were entered into the database under the names of Vision Corp. and Vision Inc. Using Party Merge, ABC Company plans to merge the two Vision parties.

### Before Party or Customer Account Merge

This table shows the from and to parties and their customer accounts and account party sites.

From Party Name	From Acct Num	From Acct Party Site	Site Use	To Party Name	To Acct Num	To Acct Party Site	Site Use
Vision Corp.	765432	500 Vision Parkway (ID: 1VISCORP)	<ul style="list-style-type: none"><li>• Bill-to</li><li>• Ship-to</li><li>• Marketing</li></ul>	Vision Inc.	234567	100 Vision Parkway (ID: 1VISINC)	Bill-to

From Party Name	From Acct Num	From Acct Party Site	Site Use	To Party Name	To Acct Num	To Acct Party Site	Site Use
		600 Vision Parkway	• Bill-to			600 Vision Parkway	Ship-to
		(ID: 2VISCORP)	• Ship-to			(ID: 2VISINC)	

The 600 Vision Parkway party sites exist for both Vision Corp. and Vision Inc. and are deemed to be duplicates.

## Party Merge Followed by Customer Account Merge Example

### Merging the Parties

The 500 Vision Parkway party site is transferred to Vision Inc. The details for 500 Vision Parkway, such as the bill-to, ship-to, and marketing party site uses stay with the party site.

The 600 Vision Parkway party site from Vision Corp. is merged with 600 Vision Parkway for Vision Inc. The bill-to site use is transferred because it does not exist for Vision Inc. The ship-to is merged because it already exists for Vision Inc.

### After Party Merge and Before Customer Account Merge Vision Corp.

- Vision Corp. is set to a status of Merged.
- The 600 Vision Parkway party site is set to a status of Merged.
- The ship-to party site use for 600 Vision Parkway is set to a status of Merged.

### Vision Inc.

- Vision Inc. has two customer accounts with these account numbers:
  - 765432
  - 234567
- Vision Inc. has three party sites:
  - 100 Oracle Parkway with a bill-to site use.  
Customer account site ID: 1VISINC.
  - 500 Oracle Parkway with a bill-to, ship-to, and marketing site use.  
Customer account site ID: 1VISCORP.

- 600 Oracle Parkway with a bill-to and ship-to site use.  
Customer account site ID: 2VISCORP.  
Customer account site ID: 2VISINC.

### **Merging the Customer Accounts**

Customer account 765432 is merged with customer account 234567. Customer account site 2VISCORP is merged with customer account site 2VISINC.

### **After Customer Account Merge**

- Customer account 765432 is set to a status of Inactive.
- Customer account site 2VISCORP is set to a status of Inactive.
- The bill-to and ship-to site uses on customer account site 2VISCORP are set to a status of Inactive.
- Vision Inc. has one customer account, 234567.
- Vision Inc. has three party sites:
  - 100 Oracle Parkway with a bill-to site use.  
Customer account site ID: 1VISINC.
  - 500 Oracle Parkway with a bill-to, ship-to, and marketing site use.  
Customer account site ID: 1VISCORP.
  - 600 Oracle Parkway with a bill-to and ship-to site use.  
Customer account site ID: 2VISINC.

## **Customer Account Merge Followed by Party Merge Example**

### **Merging the Customer Accounts**

Customer account 765432 is merged with customer account 234567. Customer account site 2VISCORP is merged with customer account site 2VISINC.

### **After Customer Account Merge and Before Party Merge**

- Customer account 765432 has the status of Inactive.
- Customer account site 2VISCORP has the status of Inactive.
- The bill-to and ship-to site uses for customer account site 2VISCORP have the status of Inactive.
- Vision Corp. has the following party sites:

- 500 Vision Parkway, with three uses: bill-to, ship-to, and marketing.
- 600 Vision Parkway, with two uses: bill-to and ship-to.
- Vision Corp. does not have any customer accounts or customer account sites belonging to it.
- Vision Inc. has one customer account, 234567.
- Vision Inc. has two party sites:
  - 100 Vision Parkway, with one use: bill-to.  
Customer account site ID: 1VISINC.
  - 600 Vision Parkway, with one use: ship-to.  
Customer account site ID: 2VISINC.

### **Merging the Parties**

The 500 Vision Parkway party site is transferred to Vision Inc. The details of the party site uses for 500 Vision Pkwy, such as bill-to, ship-to and marketing stay with the party site.

The 600 Vision Parkway party site is merged with 600 Vision Parkway to Vision Inc. The bill-to site use is transferred because it does not exist for Vision Inc. The ship-to is merged because it already exists for Vision Inc.

### **After Party Merge**

- Vision Inc. has one customer account, 234567.
- Vision Inc. has three party sites.
  - 100 Oracle Parkway with a bill-to site use.  
Customer account site ID: 1VISINC.
  - 500 Oracle Parkway with a bill-to, ship-to, and marketing site use.  
Customer account site ID: 1VISCORP.
  - 600 Oracle Parkway with a bill-to and ship-to site use.  
Customer account site ID: 2VISINC.

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## Customer Merge

This chapter covers the following topics:

- Merging Customers
- Merging Sites for the Same Customer
- Merging Different Customers
- Submitting the Merge Process
- Customer Merge Execution Report
- Reviewing Merged Customers

### Merging Customers

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

After the merge completes successfully, all activity that was previously associated with the old customer or site is now associated with the new customer or site. Activity includes invoices, debit memos, commitments, credits, receipts, adjustments, and chargebacks. The merge process also checks for records in the AutoInvoice interface tables.

You can also retain links to external systems, such as legacy and third party systems, by using the Oracle Trading Community Architecture Source System Management (SSM) feature. You can use SSM to map external systems to the entities in the TCA registry. After you map Source names and codes to TCA entities, the merge-to customer retains the cross references to the external systems of both the merge-from and the merge-to customers. See: *Source Systems Overview, Oracle Trading Community Architecture Administration Guide*.

**Important:** You can only merge sites that pass tax validation. See: *Tax Validation for Merge*, page 9-4.

## Merge Customers or Sites

You can either merge site uses for the same customer or all of the site uses for two different customers.

**Important:** You can merge site uses only in the operating units that are on your access list.

Predefined site uses include Bill-to, Ship-to, Statements, Marketing, Legal, and Dunning. You can only merge a bill-to site with a bill-to site, a ship-to site with a ship-to site and so on whether you are merging different customers or two sites for the same customer.

You can also choose to either inactivate or delete your old customer and sites use information. If you choose to delete the customer or site use information, then it is removed from the database and the application does not maintain an audit trail of this data. Note that you cannot directly delete a customer. You must use the Customer Merge process with the Delete after Merge check box selected to merge your customer (called the From Customer) to a dummy customer (called the To Customer). This process deletes the merged (From) customer. If you are merging sites for the *same* customer, then you cannot choose to delete the old customer information (since the customers are the same).

Whether you can inactivate or delete the merge-from customer depends on the account sites. If the merge-from customer has:

- Sites only in the operating units that are on your access list - you can delete or inactivate the merge-from customer.
- Inactive sites in other operating units - you can inactivate but not delete the merge-from customer.
- Active sites in operating units to which you don't have access - you can neither inactivate nor delete the merge-from customer.

Old customers and site uses that are merged are assigned a status of 'Inactive' after the merge process is complete. Inactive customers cannot generate new transactions, but you can view their information or reactivate them at any time in the Customers window.

## Merge Individuals or Organizations

Customer Merge distinguishes individual customers (consumers) from organizations and can merge both of these entities. However, the customer parties being merged must be of the same party type. Thus, you can merge only individual customers (consumers) with individual customers (consumers). You can merge only organization customers with organization customers. The same is true for merging customer accounts for

parties of different party types.

All of the requirements described in *Merging Sites for the Same Customer*, page 9-5 and *Merging Different Customers*, page 9-9 are true whether you are merging individuals or organizations.

## Identify Duplicate Customers

Use the Duplicate Customer Report to see a list of all duplicate customers before you initiate the customer merge program. This report tries to match duplicate customer names based on the search criteria that you specify. See: *Duplicate Customer Report*, *Oracle Receivables User Guide*.

## Review Customer Details

To see active or inactive customer information, use the Customer Listing Detail and Summary reports, *Oracle Receivables User Guide*. The Detail report displays contacts, addresses, and relationships for each customer you choose in your search criteria. The Summary report displays a list of your customers and their addresses.

## Merge Transactions in Other Applications

If you have any of the following applications installed and you run customer merge, the system automatically merges all transactions associated with the merge candidates in those applications as well:

- Customer Service
- Federal Financials
- Grants Accounting
- Inventory
- Master Scheduling /MRP Planning
- Order Management
- Payables
- Pricing
- Projects
- Property Manager
- Public sector financials

- Purchasing
- Quality
- Shipping
- Training Administration

## Update Transaction Information

When you merge customers, Customer Merge updates the customer information for all of the old customers transactions. For example, if you merge ACME with Customer XYZ, the program updates all of ACME's transactions with Customer XYZ's ship-to and bill-to information.

## Maintain Custom Data Integrity

If you have custom tables in your AR account that have foreign keys to the HZ\_CUST\_ACCOUNTS, HZ\_CUST\_ACCTS\_SITES, or HZ\_CUST\_SITE\_USES\_ALL table, you can use the package ARP\_GENERIC\_CMERGE to ensure that the foreign keys remain valid. This package needs to be modified to include your custom table names and foreign keys. Use the \$AR\_TOP/install/sql/arplbtrx.sql file as a guideline on how to modify this package.

## Related Topics

Submitting the Merge Process, page 9-15

Merging Sites for the Same Customer, page 9-5

Merging Different Customers, page 9-9

## Tax Validation for Merge

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

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

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

- If the addresses are not set up for tax validation in Geography Hierarchy, then you can merge the addresses as long as the country is the same.

- If you have both types of addresses, with and without addresses set up for tax validation in Geography Hierarchy, then you cannot merge the addresses.

## Merging Sites for the Same Customer

If a customer is closing one of its sites and there is activity assigned to this site, you can use Customer Merge to transfer all activity from the old site to one of this customer's existing sites. For example, ACME currently has two bill-to sites, but they are planning to close one of these locations. Customer Merge lets you transfer all of their activity from the site that will be closed to their remaining open site.

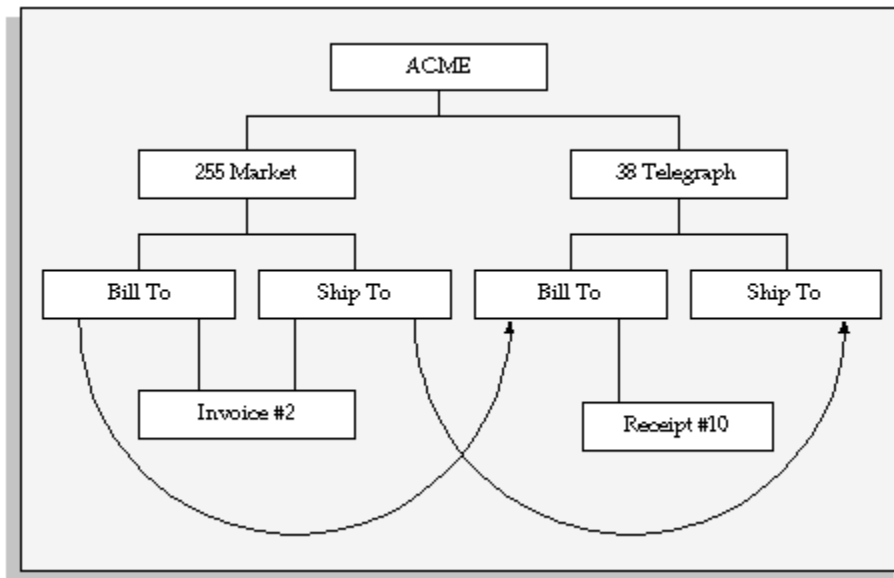
Any predefined site uses or site uses that you defined in the Receivables Lookups window must be merged with similar site uses. For example, you are merging two of Customer ABC's sites. This customer has defined the following sites as described in this table:

Address	Site Usage
Address1	Bill-to
Address1	Ship-to
Address2	Ship-to

In this example, you can only merge the ship-to site of Address1 with Address2 because they are both ship-to sites of different addresses.

The diagrams below illustrate what happens when ACME closes one of its locations. Customer Merge transfers all of ACME's activity from the site that is closed to the remaining open site.

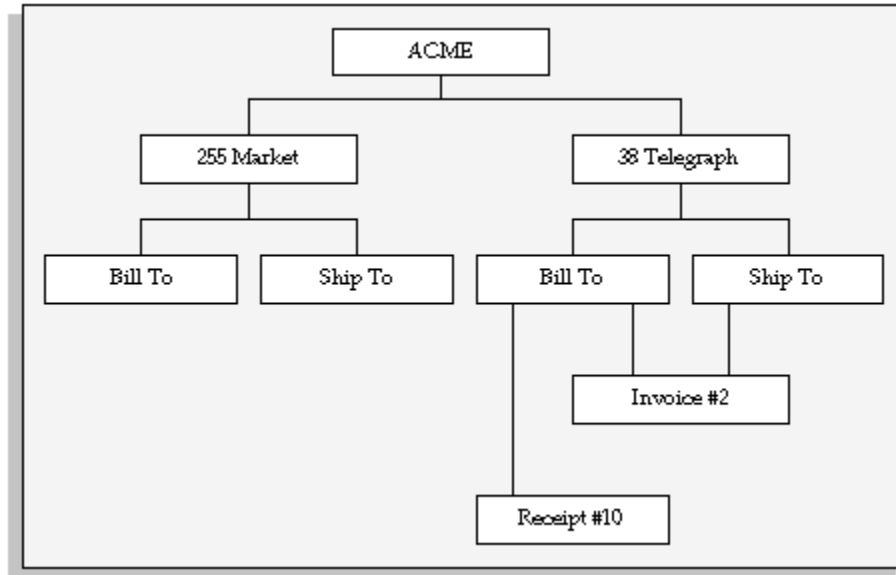
### ***Before the Merge***



This illustration shows ACME before the company closes a site and transfers all activity from the old site to an existing site. Before the merge, ACME has two addresses: 255 Market and 38 Telegraph. The 255 Market address is both a bill-to and ship-to site and has one invoice against both sites. The 38 Telegraph address is also a bill-to and ship-to site with one receipt against the bill-to site.

The illustration shows how the merge program combines the two ship-to sites and the two bill-to sites of the 255 Market and 38 Telegraph addresses, and transfers all activity from the site that is closing (255 Market) to the existing site (38 Telegraph).

### After the Merge



This illustration shows that there is no activity against ACME's 255 Market address after the merge. Instead, the invoice that was previously against the 255 Market bill-to and ship-to sites is now attached to the 38 Telegraph bill-to and ship-to sites. The receipt remains against the 38 Telegraph bill-to site.

**Important:** When merging two sites for the same customer, you cannot submit the merge if Delete After Merge is set to Yes.

## Prerequisites

- Complete Auto Invoice processing (optional). This minimizes the number of rows to be merged in the interface tables. The merge process can then run more efficiently.
- Generate the Customer Listing report to see detailed information about the customer and site uses (optional). See: Customer Listing Detail and Summary Reports, *Oracle Receivables User Guide*.
- Create a map that shows the site uses you want to merge and the sites you want to maintain. Check that you are merging like site uses (for example, Bill-To's merged with Bill-To's).
- Determine whether to inactivate or delete old site use information.

## To merge site usages for the same customer:

1. Navigate to the Customers Merge window.
2. In the From region, select the Type of customer you are merging, then select or enter the name or number of the customer.

**Tip:** If merging an individual, you can use the list of values to search for the person's first or last name.

**Important:** The customer names and number LOVs include names and numbers of only those customers that have at least one account site in the operating units that are on your access list.

3. In the From region, select the operating unit in which you want to merge the account sites. Alternatively, you may select *All* to merge the account sites in all the operating units that are on your access list and in which the customer has account sites.

In the Account Site area of the From region, the Operating Unit, Site Number, Addresses, and Usage are auto populated.

**Important:** If your responsibility allows access to only one operating unit, then that operating unit and related customer account details, such as Site Number, Addresses, and Usage, are defaulted in the Account Site area.

4. In the From region, select a Merge Reason: De-duplication or Merger.
5. In the To region, enter the same customer name or number or select it from the list of values.
6. In the From region, select each site you want to merge.
7. In the To region, enter the new Address for the site or select it from the list of values.

The Site Number is auto populated in the To region.

**Note:** Site usage is defaulted in the To region based on the usage in the From region. For example, a bill-to site use is defaulted in the To region for each site with a bill-to site use in the From region.

**Important:** You cannot merge sites with different account site usage or across operating units.

8. Assign a processing priority, P1-High, P2-Medium, or P3-Low, to the merge process.

**Note:** Use the processing priority when creating merge batches. For example, you can create a batch for merges having the priority P1 to process all the high priority merges first.

9. To save your merge details *without* submitting the merge, save your work. This lets you review your mapping for accuracy before actually merging your customer and site information.

**Note:** At any time before you choose the Merge button, you can use the Cancel button to cancel the merge

To submit the merge process immediately, choose Merge. Because batch processing is more efficient, you can decide to save the merge for later batch processing or to immediately continue with processing. To immediately process the merge, choose Continue. To save the proposed merge for later batch processing, choose Save. See: Submitting the Merge Process, page 9-15.

**Important:** If required, repeat these steps for the other operating units, if any, for the customer account.

If you wish to merge account sites in another operating unit for the same customer account or if you wish to perform an account merge for an entirely different customer account, press the Down Arrow key. This action clears the Customer Merge window and readies it for the next account merge.

## Related Topics

Merge Customers, page 9-1

Submitting the Merge Process, page 9-15

Merging Different Customers, page 9-9

## Merging Different Customers

When merging two different customers, you must merge all site uses associated with

the customer being merged. For example, ACME purchases Pacific Express and each has one bill-to site and one ship-to site. You can transfer activity from Pacific Express to ACME by merging like site uses assigned to Pacific Express (for example, Bill-to's merged with Bill-to's). The application automatically associates all transaction activity and customer relationships with the new customer.

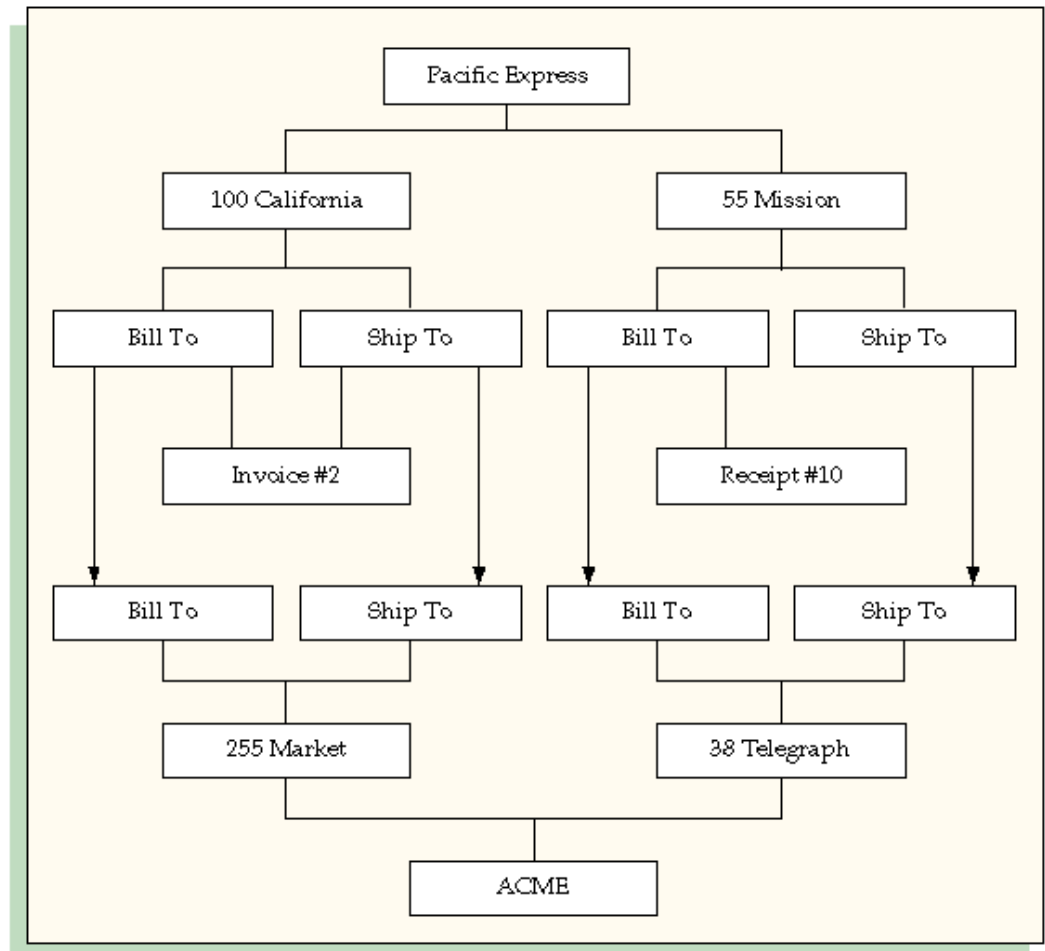
Customer Merge ensures that you inactivate or delete *all* site uses for the old customer; you cannot inactivate some site uses and delete others. In addition, you must assign all of the old customer site uses to one or more of the new customer's site uses. For example, you want to merge the following customers that have sites as described in this table:

Customer ABC	Customer XYZ
Address1 (bill-to)	Address1 (bill-to)
Address2 (ship-to)	Address1 (ship-to)
Address3 (statements)	

You can merge the two addresses having Bill-to site use (Address 1's) and the two addressed having Ship-to site use (Address 2's). However, you cannot merge Address 3 of Customer ABC, which has a Statements site use, to Customer XYZ because Customer XYZ has no address with the same site use. The only way you can merge these two customers is to copy Address 3 and assign its site use to the merge-to customer (Customer XYZ) by selecting the Create Same Site check box.

The diagrams below illustrate what happens when ACME purchases Pacific Express. Customer Merge transfers activity from Pacific Express to ACME by merging like site uses assigned to Pacific Express.

### Before the Merge

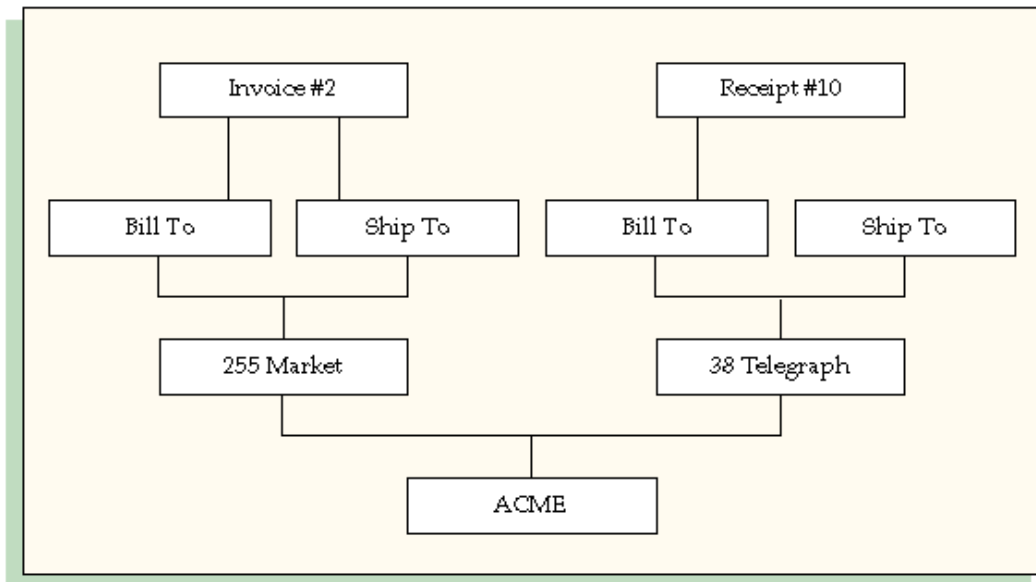


This illustration shows the sites and activity for Pacific Express and ACME, before you transfer all activity from Pacific Express to ACME.

Before the merge, Pacific Express has two sites: 100 California and 55 Mission. The 100 California address is both a bill-to and ship-to site and has one invoice against both sites. The 55 Mission site is also a bill-to and ship-to site with one receipt against the bill-to site. ACME has two sites: 255 Market and 28 Telegraph. Both of these sites are bill-to and ship-to sites.

The illustration shows how the merge program transfers activity from Pacific Express to ACME by merging like site uses assigned to Pacific Express.

### After the Merge



This illustration shows that there is no activity against Pacific Express after the merge. Instead, the Pacific Express invoice against the 100 California bill-to and ship-to sites is now attached to both the bill-to and ship-to sites of ACME's 255 Market address. The Pacific Express receipt against the 55 Mission bill-to site is now attached to ACME's 38 Telegraph bill-to site.

## Prerequisites

- Generate the Duplicate Customers Report to see a list of potential duplicated customers (optional). See: Duplicate Customer Report, *Oracle Receivables User Guide*.
- Create a map that shows the site uses for the old customer that you want to merge with the To customer. Check that you are merging like site uses (for example, Bill-to's merged with Bill-to's).
- Create new site uses for the To customer (if the old customer has any site uses which does not exist for the To customer).
- Determine whether to inactivate or delete the old customer.

## To merge two different customers:

1. Navigate to the Customers Merge window.
2. In the From region, select the Type of customer you are merging, then select or enter the name or number of the customer to merge.

**Note:** If merging an individual, you can use the list of values to search for the person's first or last name.

**Important:** The customer names and number LOVs include names and numbers of only those customers that have at least one account site in the operating units that are on your access list.

3. In the From region, select the operating unit in which the customer you want to merge has account sites. In case the customer you want to merge has account sites in more than one operating unit, select *All* to merge the account sites in all the operating units that are on your access list.

In the Account Site area of the From region, the Operating Unit, Site Number, Addresses, and Usage are auto populated.

**Important:** If your responsibility allows access to only one operating unit, then that operating unit and related customer account details, such as Site Number, Addresses, and Usage, are defaulted in the Account Site area.

4. In the From region, select a Merge Reason: De-duplication or Merger.
5. In the To region, select the customer Type, then enter the name or number of the customer to merge or select it from the list of values.
6. For each site in the From region, enter an address in the To region or select it from the list of values.

The Site Number is auto populated in the To region.

**Note:** Site usage is defaulted in the To region based on the usage in the From region. For example, a bill-to site use is defaulted in the To region for each site with a bill-to site use in the From region.

**Important:** You cannot merge sites with different account site usage or across operating units.

To copy an address and site usage from the From region to the merge-to customer, check the Create Same Site box. The merge-from value in the Location field is also transferred to the merge-to customer location.

In any operating unit, the location must be unique for each combination of customer account and site use type, or business purpose. If the location transfer

violates this validation for the merge-to customer, you can choose to either transfer the location with "-C" appended or manually enter the merge-to customer location.

**Note:** You can update the Location field only if the HZ: Location Updatable profile option is set to Yes. If you cannot update the field, a unique, sequential value is automatically assigned as the merge-to customer location.

7. Choose to delete or inactivate the old customer information.

To keep an audit trail of the old customer information, do not check the Delete After Merge check box. The application assigns a status of 'Inactive' to the old customer after you complete the merge.

To delete the old customer information, check the Delete After Merge check box.

8. Assign a processing priority, P1-High, P2-Medium, or P3-Low, to the merge process.

**Note:** Use the processing priority when creating merge batches. For example, you can create a batch for merges having the priority P1 to process all the high priority merges first.

9. To save your merge details *without* submitting the merge, save your work. This lets you review your mapping for accuracy before actually merging your customer and site information.

**Note:** At any time before you choose the Merge button, you can use the Cancel button to cancel the merge

To submit the merge process, choose Merge. Because batch processing is more efficient, you can decide to save the merge for later batch processing or to immediately continue with processing. To immediately process the merge, choose Continue. To save the proposed merge for later batch processing, choose Save. See: Submitting the Merge Process, page 9-15.

**Important:** If required, repeat these steps for the other operating units, if any, for the customer account.

If you wish to merge account sites in another operating unit for the same customer account or if you wish to perform an account merge for an entirely different customer account, press the Down Arrow key. This action clears the Customer Merge window and readies it for the next account merge.

## Related Topics

Merging Customers, page 9-1

Merging Sites for the Same Customer, page 9-5

## Submitting the Merge Process

You can submit the customer merge process immediately after entering your merge details, or you can save your work and submit the merge later. You may not want to submit the merge immediately if, for example, you want to review the merge candidates before transferring the customer and/or site information.

You can run the Customer Merge program from the Customers Merge window for individual merges or the Standard Request Submission windows for batch merges. View detail results of the Customer Merge program in the Customer Merge Execution Report, page 9-17.

## Merging Individually

Use the Customer Merge window to submit the Customers Merge program for one merge at a time.

### Prerequisites

- Enter merge details. See: Merging Different Customers, page 9-9 or Merging Sites for the Same Customer, page 9-5.

### To submit an individual merge:

1. Navigate to the Customers Merge window.
2. When you are certain that all of the information in the Merge Customers window is correct, choose Merge. Because batch processing is more efficient, you can decide to save the merge for later batch processing or to immediately continue with processing. To immediately process the merge, choose Continue. To save the proposed merge for later batch processing, choose Save. If you choose Continue, the application submits the Customer Merge program as a concurrent process and assigns a Request ID.

The Process Flag field displays the current status of a merge as Processing, Completed, Failed, or Saved. After merge processing ends, the Process Flag field displays either Completed or Failed. If the merge failed, then the Error Message field displays a detailed error message. Using the information provided in the error message, you can correct the information in the Customers Merge window and then choose Merge again or choose Save to include the merge in a batch for future processing.

## Merging in Batch Process

Use the Customer Merge program to run customer merges in a batch process. When you submit merges from the Customers Merge window, you run the Customer Merge program for only one merge at a time. From the Standard Request Submission window or the Request Submission page, however, you can:

- Specify the number of merges you want the Customer Merge program to execute in a batch.
- Select the processing priority — P1-High, P2-Medium, or P3-Low — to specify the merges that you want to include in a batch. For example, you can select the processing priority P1-High to process all the high priority merges in a batch.

The Customer Merge program groups the merge processes into merge sets and sequentially runs and saves each set. The setting for the AR: Customer Merge Commit Size profile option determines the size of the merge sets. For more information, see: *Customer Merge Deployment Category, Oracle Trading Community Architecture Administration Guide*.

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

Use the Standard Request Submission windows or the Request Submission page to run the Customer Merge program. See: *Running Reports and Programs, Oracle E-Business Suite User Guide*.

The Customer Merge Execution report for a batch identifies any unsuccessful merge processes and provides the appropriate error messages. You can view and correct the information about the unsuccessful merge in the Customers Merge window. Viewing the unsuccessful merge in the Customers Merge window displays FAILED in the Process Flag field and a detailed error message in the Error Message field. After correcting the merge information, you must change the Process Flag to SAVED and then either choose Save to include the merge in another batch for future processing or choose Merge to immediately process the merge.

## Prerequisites

Before you run the Customer Merge program, you must create merge batches to merge sites for the same customer or to merge different customers.

## Related Topics

Merging Customers, page 9-1

Customer Merge Execution Report, page 9-17

## Customer Merge Execution Report

Use the Customer Merge Execution report to review the customers and site uses involved in the merge process. The application automatically generates this report when you initiate the Customer Merge program. See: Submitting the Merge Process, page 9-15.

The report heading displays the request ID for your concurrent process. The report body displays Inactive or Delete in the Status column to indicate the status of your old customer or site use. It displays an error message if the Customer Merge program failed.

You can also review details of past merges online using the Customers Merge window. See: Reviewing Merged Customers, page 9-17.

### Report Headings

**Request ID:** The request ID for your concurrent process.

### Column Headings

**Address:** The address associated to the business purpose of the old and new customers that you merged.

**Location:** The location for the business purposes of the old and new customers that you merged.

**Name [Number]:** The name and number of the old and new customers that you merged.

**Primary:** *Yes* or *No* to indicate whether this is the primary Site Use.

**Site Use:** The business purpose of the old and new customers that you merged.

**Status:** *Inactive* or *Delete* to indicate the status of your old customer, address, and business purpose. If you choose to delete old customer information, the system removes this information from the customer tables.

### Related Topics

Merging Customers, page 9-1

## Reviewing Merged Customers

You can review details of your merged customer online using the Customers Merge window.

### Prerequisites

- Enter merge details. See: Merging Different Customers, page 9-9 or Merging Sites for the Same Customer, page 9-5.
- Submitting the Merge Process, page 9-15.

**To review previously merged customers:**

1. Navigate to the Customers Merge window.
2. Query a specific customer or query all Processed customers.
3. Execute the query. The application will display the concurrent request ID of the customer merge.

**Related Topics**

Merging Customers, page 9-1

Submitting the Merge Process, page 9-15

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## Introduction to Oracle Resource Manager

This chapter covers the following topics:

- Overview of the Oracle Resource Manager
- Oracle Resource Manager Integrations
- Terms and Definitions
- Resource Manager Rules for HTML

### Overview of the Oracle Resource Manager

Resource Manager enables other modules and applications to use resources no matter where they were created. It acts as a central repository for various types of resources. You can further define your resources by organizing them into groups and teams and assigning various roles to them. Whether or not resources are created in Resource Manager, you can import various types of resources, such as employees, suppliers, parties, or partners, which are created in other Oracle applications into Resource Manager. Once imported, they become available for other modules and applications to use. You can also update information about resources (which were created in other applications) by using a variety of concurrent programs to synchronize your information.

Resource Manager can be accessed from Forms and HTML depending on use and who is using it. Furthermore, depending on whether or not it is used as a stand-alone module, or if it is integrated with other applications or modules, its appearance can change. For example, when coupled with the HTML Calendar, Resource Manager appears as a tab labeled "People". This section covers the following topics:

- What is the Resource Manager?, page 10-2
- What are Resources?, page 10-3
- Understanding Roles, page 10-4

- Understanding Groups, page 10-6
- Determining Group Hierarchy, page 10-7
- Understanding Teams, page 10-7
- What is a Salesperson?, page 10-7
- How are the Different Resource Names Fields Used?, page 10-8

## What is the Resource Manager?

Resource Manager provides lists of resources, as individuals, groups, and teams, for applications to access and manage their resources. Defining and organizing your resource information makes your resources available to the calling application modules for work action.

Use Resource Manager to:

- **Import employees** from Oracle HRMS, parties and partners from Oracle Receivables, and supplier contacts from Purchasing.
- **Identify resources as salespeople.** The only resource you can define in the Forms-based Resource Manager is a salesperson. In the HTML-based Resource Manager, you can define and identify employee resources as salespeople. This employee information is also recorded in the Oracle Human Resources Management System (HRMS) tables and automatically becomes a CRM resource.
- **Assign additional attributes to the resources** so that these resources can be used by other applications. In the Forms-based Resources window, you can enter or view additional information in the Service, Interaction Center, Compensation, or Receivables tab for any selected resource.
- **Create a resource group and team structure** by using Resource Manager to better manage resources for particular business needs. Team resources can be created in the Forms-based Resource Manager only.
- **Assign individual resources with resource roles and role types to groups and teams.** This allows you to assign groups of people with the appropriate resources to specific tasks.

### Example

Sue Smith, a new sales manager at Vision, Inc. wants to establish all her employees and outside contacts in the E-Business suite. She imports her subordinate group of salespeople from HRMS, her list of top ten customers (parties) from various customer accounts, and her list of plant managers (supplier contacts) from the companies that design and engineer her products. To make sure her sales team gets paid their commissions, she defines each one as a salesperson. This information is recorded in the

HRMS tables.

To make her organization more efficient, Sue decides to create two resource groups, one of all her outside salespeople and one for all her inside sale people. She also decides that an upcoming sales campaign will need a group of cross functional people to target her goal. So she also creates a team called Campaign Z. This team is made up of ten sales people, six marketing representatives, two collateral writers, and a project manager to oversee the group.

## What are Resources?

Resources are defined as the employees, supplier contacts, parties, and partners that are used by the different CRM components to accomplish business objectives. The following table describes all five resource categories used in Resource Manager.

### *Resource Category Descriptions*

Resource	Description
Employee	An employee is a person who has been hired to work for a company. Resources of type "Employee" are imported as resources from Human Resources Management System (HRMS). Examples of an Employee resource include a Sales Representative or a Field Service Engineer.
Supplier Contact	A supplier contact is the contact information for a person or agency that sells raw material or goods. Resources of type "Supplier" can be imported as resources from the Oracle Purchasing (PO) application. An example of a supplier contact is a Sales Representative or Field Service Engineer who is a contact for a vendor.
Party	A party is an entity that can enter into a business relationship. Resources of type "Party" can be imported as resources from Oracle Receivables. An example of a party is a customer.

Resource	Description
Partner	A partner is one of two or more persons who contribute capital to establish or maintain a commercial venture and who usually share in the risks and profits. A Partner resource can be imported as resources from Oracle Receivables.
Other	Other objects such as assets, equipment or property. Examples include but are not limited to meals, furniture and audio/visual equipment.

Resources can be organized into groups and teams. Each group or team is defined in one of two ways, a role or a role type.

## Understanding Roles

### Roles

A role can encompass one or more job descriptions and job titles (Field Service Representative), or functions within the applications (such as default marketing approver, MES\_Publish, and Channel\_Manager). You assign roles to resources, resource groups, and resource teams. For example, the seeded roles for Sales include manager, administrator, approver, and representative. The seeded roles for TeleSales include manager, administrator, and agent. You can define custom roles for your business needs. Ensure that a role type exists so that you can associate the new role.

### Role Types

A **role type** is a collection of roles associated with a particular CRM module. Examples are Sales, TeleSales, Marketing, Sales Compensation, Support, and Call Center are all role types. Role types are seeded by the different modules that access the Resource Manager. You can define custom role types for your business needs.

#### Example

Think of role types as a "family" and its members as having the various "roles" with in the family.

#### Sales (role type)

- Roles: manager, administrator, representative, and sales approver

### Role Attributes

Role **attributes** are associated with each role, and define its responsibility within the group. In addition to these responsibilities, a role attribute can also be designated as

active (currently), and seeded (available out-of-the-box).

There are four seeded role attributes that can be associated to roles at role creation:

- **Member:** Default when another attribute is not chosen (Lead, Administrator, Manager.)
- **Lead:** Used in the context of team lead.
- **Administrator:** Used to grant this user permission to view information about other group members. In the HTML-based Resource Manager, only a user in a group with either the Administrator or Manager group member role attribute can update group member and group hierarchy information.
- **Manager:** Used to set up the group reporting hierarchy. For example, all the forecasts for a group of sales representatives will roll up to the person with the Manager role attribute in that group. In addition, a user with the Manager group member role attribute can update the group member and group hierarchy information in the HTML Resource Manager.

You use these role attributes to define how a resource is reporting hierarchy. This hierarchy is used in sales product families, such as Sales Online and TeleSales, to control the data access privilege (customer, sales lead, and sales opportunity) as well as sales forecast rollup and incentive compensation plan through the group functionality. It is also used for workflow notifications and escalations. For example, if you set up an escalation for service requests and tasks, notifications for members of groups go to the manager.

### Example

The following table lists example role types, and the seeded roles associated with each along with their attributes.

**Example of Roles, Role Attributes, and Role Types**

Role Type	Seeded Roles	Role Attribute
Sales	• Manager	• Manager, Active, Seeded
	• Administrator	• Admin, Active, Seeded
	• Approver	• Member, Active, Seeded
	• Representative	• Member, Active, Seeded

Role Type	Seeded Roles	Role Attribute
TeleSales	• Manager	• Manager, Active, Seeded
	• Administrator	• Admin, Active, Seeded
	• Agent	• Member, Active, Seeded

#### See Also

- Understanding Groups, page 10-6
- Understanding Teams, page 10-7

## Understanding Groups

The following concepts are useful in understanding the groups function in Resource Manager.

#### Resource Groups

A group is based on the similar functionality or the roles of its members. It can consist of individual resources and groups. For example, Linda's group includes individual resources, John, Mark, and Carol, as well as another resource group, Mary's group. A resource can belong to one or many groups at one time.

#### Group Member Roles

Roles and responsibilities are commonly associated with all members of a resource group, but not all group roles need to be filled. For example, a sales group has one sales manager and a few sales representatives. The sales manager and the sales representative are job roles assigned to the group members.

Each member can have multiple roles defined within a group. For example, Mid West Sales Group consists of only two people due to resource constraints, one of them plays two roles, sales manager and field sales agent, at the same time.

#### Group Roles

Multiple roles can be assigned to a resource group. For example, Group A has three resources (an employee, a Party, and a Partner). Those three resources play a role in Group A, even if they have different roles assigned to them individually. The Party can have an individual Team role but the role it plays in group A is the Manager role.

## Determining Group Hierarchy

Individual resources can be assigned to a group, and a group can belong to another group or to multiple groups. Resources therefore can be organized through a group hierarchy with a parent-child relationship.

**Important:** A group can belong to multiple groups but only one parent at a given point of time.

### Example

Jack William and Frank Nelson are sales representatives who belong to the Product A group and directly report to Pat Smith, the Sales Manager of Product A. However, Jack and Frank indirectly report to Jeff Walsh who leads the Field Sales Group as Field Sales Manager. The Field Sales Group and the Product A group have a parent-child relationship. You can use the group hierarchy to view direct reporting or all reporting information for a resource. Refer to the Viewing Group Hierarchy procedure in the Implementation Guide for detailed information.

## Understanding Teams

You create Teams **only** in the Forms-based Resource Manager. The following concepts are useful in understanding the Teams function in Resource Manager.

### Resource Teams

A team is a collection of cross-functional resources. Team members are chosen for their availability and qualifications. You define a team to organize the necessary resources to accomplish an objective or a particular task. Teams consists of groups and individual resources that work together to efficiently complete a project. A resource can belong to multiple resource teams. For example, a solution team can have support and sales groups as well as a TeleSales agent as an individual resource.

### Team Member Roles

Each team member, whether or not it is an individual resource or a resource group, can have multiple roles assigned to a team. For example, a team member can have both Sales Manager and Sales Representative roles due to resource constraints in a team.

### Team Roles

You can assign multiple roles to a team. For example, a solution team plays a support manager role, and a sales approver role at the same time while sales demand is strong.

## What is a Salesperson?

A salesperson is any person involved in the sale or support of products and services. Salespeople are typically field personnel, but can also be support groups and other

product specialists involved either directly or indirectly in generating revenue for the organization.

Depending on their relationship to the sales organization, salespeople can be internal employees or external people or organizations. Employees, Parties, Partners, and Supplier Contacts can all be further defined as salespeople by having sales numbers and relevant information assigned to them after being imported to the Resource Manager. However, these imported resources always carry their original resource categories of Employee, Party, Partner, or Supplier Contact. These resource categories never change.

#### **Example**

Your company partners with Vision Enterprises to promote certain products. Vision Enterprises can be imported as category "Partner" from Oracle Receivables and be given a sales number and relevant information, thus Vision Enterprises becomes a salesperson and can be assigned to your group or team, still with the same category "Partner" for marketing campaign or opportunities.

In addition to imported resources, the only resource you can create, and not import, is a salesperson in HTML.

## **How are the Different Resource Name Fields Used?**

There are several name fields that are associated with Resource Manager:

- Employee Name
- Source Name
- Resource (Preferred) Name
- Salespersons Name
- User Name

An **Employee Name** is usually your legal name. It is also the **Source Name** which you can see in the Forms UI. The **Source Name** derives from HRMS before the resource is imported, or when a resource is created in Resource Manager.

The **Resource (preferred) Name** is the name that is available to the other modules or applications from Resource Manager. For example, perhaps your first name is difficult to pronounce and you have always used a nickname. That nickname is your resource name.

The **Salesperson Name** is not visible in either of the Forms or HTML UIs but is recorded in the Resource Manager Salesreps table. However, there is a Salesperson Name field in the HRMS application.

The **User Name** is generally one brief name that is used for e-mail and logging into applications and it never changes.

## Understanding the Differences of the Various Name Fields

An employee can be created in HRMS. When the employee is imported into Resource Manager, the full name is populated in the Resource Name and Source Name fields. If the resource is also a salesperson, then the salespersons name is populated with the resource name. Any changes made to the resource name, are automatically reflected to the salespersons name.

**Note:** The resource name and salespersons name are always the same regardless of resource category. The source name and employee name are always the same for category Employee.

### Example

Penelope Smith joins Vision Enterprises as a salesperson. Her employee data was created in HRMS, and imported into Resource Manager.

---

Resource Name:	Penelope Smith
Source or Employee Name:	Penelope Smith
Salespersons Name:	Penelope Smith

---

Her customers know her by the nickname Penny. So she changes her resource name in the HTML version of Resource Manager to Penny since that is what she prefers people to call her.

---

Resource Name:	Penny Smith
Source or Employee Name:	Penelope Smith
Salespersons Name:	Penny Smith

---

Later in the year she marries and decides to use her husband's last name, Jones. So HRMS changes her last name as requested and the Resource Administrator runs the Synchronize Employees concurrent program. At this time, she prefers to use her given name so customers will not be confused.

---

Resource Name:	Penny Smith
Source or Employee Name:	Penelope Jones

---

---

Salespersons Name:	Penny Smith
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---

Later in the year, she decides that she wants to append her new last name to her maiden name. The Resource Administrator changes her resource name accordingly which is reflected in her salespersons name as well. In this example, the Synchronize Employees concurrent program was **run**.

---

Resource Name:	Penny Smith-Jones
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Source or Employee Name:	Penelope Jones
--------------------------	----------------

Salespersons Name:	Penny Smith-Jones
--------------------	-------------------

---

Later in the year, she decides that she wants to append her new last name to her maiden name. The Resource Administrator changes her resource name accordingly which is reflected in her salespersons name as well. In this example, the Synchronize Employees concurrent program was not **run**.

---

Resource Name:	Penny Smith-Jones
----------------	-------------------

Source Name:	Penelope Jones
--------------	----------------

Employee Name:	Penelope Smith-Jones
----------------	----------------------

Salespersons Name:	Penny Smith-Jones
--------------------	-------------------

---

## Oracle Resource Manager Integrations

The entire CRM suite uses Resource Manager to import and view resources, define resources (salespeople), define roles and role types, create teams and groups, and organize resources within those teams and groups.

For example, the following CRM modules use Resource Manager to define or schedule resources:

- **Marketing** uses Resource Manager to set up marketing groups and execute marketing campaigns.
- **Service** uses group and team lists of resources from Resource Manager for service request assignments.

- **iSupport** uses Resource Manager to set up support groups to fulfill service and support needs.
- **Incentive Compensation** uses Resource Manager to set up sales representatives and sales compensation group hierarchies.
- **Call Center** uses Resource Manager for call center routing.
- **Sales Online** uses Resource Manager to set up a sales hierarchy.

Oracle Common Application Calendar also uses Resource Manager:

- **Forms-based Calendar** uses Resource Manager to track the availability of resources.
- **Assignment Manager** uses Resource Manager to provide a list of qualified resources.
- **Territory Manager** uses Resource Manager to select the resources for a particular territory.
- **Task Manager** uses Resource Manager to provide single, group, and team lists of resources for task assignments.

Resource Manager uses the concept of the Oracle Trading Community Architecture (TCA). You can import resources from the following different sources:

- Resources of category "Party" and "Partner" can be imported from Oracle Receivables to Resource Manager and can become available resources. You can only import partners that are defined as an organization, however you can subsequently define the imported party as a sales person and assign it a sales number and other relevant information.
- Resources of category "Supplier Contact" can be imported as resources from one or more supplier sites. When importing supplier contacts from Purchasing (PO), the supplier contact must exist in the PO\_VENDOR\_CONTACTS table and be effective on the given date of import.
- Resources of category "Employee" can be imported as resources from Human Resource Management System (HRMS). The employee must exist in table PER\_ALL\_PEOPLE\_F and be effective on the given date of import.

## Terms and Definitions

The following table describes terms and definitions associated with the Resource Manager.

### ***Resource Manager Terms and Definitions***

<b>Term</b>	<b>Description</b>
Employee	An employee is a person who has been hired to work for a company. Employee resources can be imported as resources from the Human Resources Management System (HRMS).
Resource Manager	A single place for defining, accessing, and maintaining all CRM and ERP resources.
Category	A category is the highest level that a resource can be rated in relation to skills management. If a resource is rated at the category level, and not rated at any one of the product, platform, or product code levels, it does not imply the resource is also rated at those levels. Categories can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Component	Within a product in skills management, there are numerous components. A resource can be rated individually for each of those components. Components can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Partner	A partner is one of two or more persons who contribute capital to establish or maintain a commercial venture and who usually share in the risks and profits. A Partner resource can be imported as resources from Oracle Receivables.
Party	A party is an entity that can enter into a business relationship. A party resource can be imported as resources from Oracle Receivables.

<b>Term</b>	<b>Description</b>
Platform	Within a category, there could be numerous platforms in Skills Management. A resource can be rated individually for each of those platforms. Platforms can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Problem	Within a category in Skills Management, there could be numerous problems. A resource can be rated individually for each of those problems. Problems can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Product	Within a category in Skills Management, it is possible to have numerous products. A resource can be rated individually for each of those products. A product can be sub-divided into components. Products can be rated with the following: Foundation, Intermediate, Skilled, Advanced, Expert, or N/A.
Resource	A resource is the basic element of the Resource Manager and is defined as people, places and things.
Resource Category	There are five types of resources: Party, Employee, Partner, Supplier Contact, To Be Hired (TBH), and Other.
Skills Management	Skills Management provides the ability to add a new skill rating to a resource. The resource can update and maintain their skill rating, attach a numeric value to each skill level, and change the actual name of each skill level.
Supplier Contact	A supplier contact is the contact information for a person or agency that sells raw material or goods. Supplier resources can be imported as resources from the Purchasing (PO) application.

Term	Description
Workflow	<p>Oracle Workflow automates and continuously improves business processes, routing information of any type according to business rules you can change. The rules, which we call a workflow process definition, include the activities that occur in the process and the relationship between those activities. An activity in a process definition can be an automated function defined by:</p> <ul style="list-style-type: none"> <li>• a PL/SQL stored procedure or an external function</li> <li>• a notification to a user or role that may request a response</li> <li>• a business event</li> <li>• a subflow that itself is made up of many activities</li> </ul>

## Resource Manager Rules for HTML

Resource Manager has several rules it follows for security purposes:

- The logged in user can only modify his information.
- A user can not update their own job title.
- A manager of a group cannot change his directs personal information except for skills.
- An administrator can change any resource's personal information.
- Group Hierarchy is the ability to alter the group structure.
  - A member of a group who has a role within that group and the role type of admin can update the group hierarchy.
  - A member of a group who has a role within that group and the role type of admin can edit group structure of the child groups of the parent group where they have this role.

- A manager of a group who has a role within that group and the role type of admin or manager can update the group hierarchy.
- A manager of a group who has a role within that group and the role type of admin or manager can edit group structure of the child groups of the parent group where they have this role.
- Skills Management is the ability to rate resources based on skill level.
  - Only positive integers are acceptable for skill ratings.
  - No two skill ratings can have the same numeric value.
  - You cannot change the numeric value of the category N/A.
  - Skill rating names are editable for specific business needs.
  - No two skill ratings can have the same name.
  - A resource's manager cannot add or modify new skill levels to his subordinates.
  - Any user can view a resource's skill rating.
- Web Availability is the ability for a resource to make their status Web available or unavailable in Forms.
  - Only the logged in resource can make their status available or unavailable.
  - The UI is available as an option in the tool bar from the Customer Service responsibility in the Service Request form.



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## Overview of Using Oracle Resource Manager

This chapter covers the following topics:

- Accessing Oracle Resource Manager Interface
- Summary of Oracle Resource Manager Tasks

### Accessing Oracle Resource Manager Interface

The Resource Manager can be called from other applications. The HTML version of Resource Manager is accessed from other applications or modules by navigating to the **Resources** tab. Therefore the responsibilities and navigation path will vary. All of the Resource Manager user functions described in this book can also be performed by administrators that have the Resource Self Service Administration responsibility. The following tables describes how you can access the Resource Manager:

#### *Resource Manager Navigation Paths*

Description	Responsibility	Navigation Path
The Standalone Forms-based Resource Manager	<ul style="list-style-type: none"><li>• CRM Administrator or</li><li>• CRM Resource Manager responsibility</li></ul>	Select Resource Manager in the Navigator window.
The Standalone HTML-based Resource Manager	CRM Application Foundation User responsibility	Select the People tab. Use the Employees subtab or Groups subtab to access the employee or group resource windows.

Description	Responsibility	Navigation Path
<b>HTML-based Resource Manager for administrative duties</b>	Resource Self Service Administrator responsibility	Select the Administration tab to access the setup windows.
<b>The Forms-based or HTML-based Resource Manager from other CRM applications</b>	Resource Manager can be accessed through different CRM applications.  <b>Example:</b> You can create group resources in Forms by selecting the Customer Support responsibility.	<b>Example:</b> Select Resource Manager > Maintain Resources > Groups.

**Note:** There is a bug in the Netscape browser that can affect Resource Manager. Do not use the Back button, as you may lose your data. It is recommended that you use the Resource Manager user interface (UI). The Internet Explorer browser does not have this issue.

## Summary of Oracle Resource Manager Tasks

Use Oracle Resource Manager to perform the following types of tasks:

- Managing Employee Resources
- Managing Group Resources
- Searching for Resources, Groups, and Teams

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## Managing Employee Resources

This chapter covers the following topics:

- Viewing Resource Information
- Defining Your Personal Information
- Viewing Your Organizational Structure
- Defining Your Skill Rating
- Viewing a Resource's Skill Ratings
- Making a Resource Web Available

### Viewing Resource Information

Perform the following steps to view resource information.

**Note:** Your ability to modify resource fields depends on your which responsibility you use to access Resource Manager.

#### Responsibility

CRM Application Foundation User

#### Steps

1. Navigate to the **Resources** tab and click the appropriate subtab depending on the category with which the resource information is associated. Categories include:
  - Employees
  - Parties
  - Partners

- Supplier contacts
2. You can also view the following details by clicking your resource name:
- Picture (if available)
  - Phone/Email
  - Work Address (visible to employees only)
  - Compensation Related Details
  - Sales Related Details
  - Service Related Details (visible to employees only)
  - Active Roles
  - Group Membership
  - Team Membership

**Note:** Some information imported from HRMS such as Business Group and Work Fax cannot be updated.

### See Also

- Defining Your Personal Information, page 12-2
- Viewing Your Organizational Structure, page 12-3

## Defining Your Personal Information

Only you or a resource administrator with the Resource Self Service Administrator responsibility can maintain your personal information. Your direct manager can view your personal information but cannot update it. Perform the following to define your personal information.

- Fields can only be updated if set by the administrator.
- If any changes to your personal information require prior management approval, then those changes will not appear until the appropriate manager grants approval for the changes. Changes that do not require management approval will appear upon completion.

## Responsibility

CRM Application Foundation User

## Steps

1. Navigate to the **Resources** tab and then click the **Employees** subtab.
2. Click the **Advanced Search** button, search for your resource name and then click the **Update** icon next to your resource name in the search results page.
3. Optionally modify the following and then click the **Update** button:
  - Resource Name
  - Service Information including Time Zone, Primary Language, Cost Per Hour, Support Site, and Secondary Language

## See Also

- Viewing Your Personal Information, page 12-1
- Viewing Your Organizational Structure, page 12-3

# Viewing Your Organizational Structure

Perform the following to view your organizational structure:

## Responsibility

CRM Application Foundation User

## Steps

1. Navigate to the **Resources** tab click the **Employees** subtab, and then click the **Advanced Search** button.
2. Click the **Organization** icon next to your resource name in the search results page.

## See Also

- Viewing Your Personal Information, page 12-1
- Defining Your Personal Information, page 12-2

## Defining Your Skill Rating

Using Skills Management, resources can maintain their skill ratings at descending levels from highest, which is broader, to lowest, which is more granular. Levels include:

- category (such as Accessory.Misc)
- type (such as Product)
- product name (CM55437 – Docking Station),
- product component (Others)
- platform (Sun Server)
- problem code (such as fix server, billing errors, install problem, or documentation problem).

Skill ratings are used by customer support teams to select the most qualified resource to assign to a service request. Skill ratings cascade in a hierarchical fashion in which the higher level elements, include the lower level ones. For example if you define a resource's skill rating for a category, but not a product, Resource Manager cascades the skill rating to include the product with the category. If you define the skill rating for the category and product, but not the component, then Resource Manager cascades the skill rating to include the category, product, and component. This behavior is dictated by the available options in the UI.

There are many different scenarios in which a resource's skill may be rated. Perform the following steps to rate the resource skill at the category level. Resources can also remove their skill ratings by selecting "Not Applicable" from the list of available skill levels.

- Category, Product Name and Component information are set up in Oracle Inventory.
- If a Problem Code or Platform is selected in the Type field, then the Component field is not available.
- Managers and team leads can review and adjust a subordinate's ratings.

## Responsibility

Resource Self Service Administrator

## Steps

1. Navigate to the **Resources** tab, click the appropriate subtab depending on the resource category with which your personal information is associated and then click the **Advanced Search** button. Categories include:
  - Employees
  - Parties
  - Partners
  - Supplier Contacts
  - Groups
  - Teams
  - To Be Hired
  - Others
2. Click the **Skills** icon next to your resource name in the search results page and then click the **Add New Skill** button.
3. Click the **Go** button next to the Category text field and then choose the category you want to use.
4. Use the drop-down list to select a Type. Options include: Platform, Problem Code, or Product.

**Note:** If you want to assign a problem code to a product within a category then choose Product from the drop-down list. When the page refreshes, you can optionally specify a problem code for the product. If you want to assign a problem code directly to a category, choose Problem Code from the drop down menu. When the page refreshes no product information is associated with the problem code.

**Note:** You can choose to rate a category only by performing any of the following:

- Choosing a category from the list of values.
- Selecting a Skill Level.

- Choosing No Cascade option.
5. Click the **Go** button next to the Name text field.

Depending on the type you selected, one of three windows will appear: The Select a Platform window, the Select a Problem Code Window, or the Select a Product window opens. If you selected a product in the preceding step then the name is not required.
  6. Click the choice you want to use.

The information automatically populates the text field and you are returned to the Skills window.
  7. If you select Product:
    1. Click the **Go** button next to the Component text field.

The Select a Component window opens.
    2. Select the component you want to use.

The information automatically populates the text field and you are returned to the Skills window.
    3. Choose one of the following radio buttons:
      - **Cascade All:** When a product is rated, this option cascades that rating to all of the product's components regardless of whether or not they are already rated.
      - **Cascade:** When a product is rated, this option cascades that rating to any of the product's unrated components.
      - **No Cascade:** When a product is rated, this option does not cascade that rating to any of its components.
  8. Use the drop-down list to select your Skill Level. Options include: Not Applicable, Basic, Functional, Experienced, Knowledgeable, and Expert.

**Note:** If you wish to delete your skill rating, select **Not Applicable** from the drop-down list of skill levels.
  9. Click **Create**.

## Viewing a Resource's Skill Ratings

Any logged in resource can view another resource's skill ratings. Perform the following steps to view a resource's skill rating.

### Responsibility

CRM Application Foundation User

### Steps

1. Navigate to the **Resources** tab, click the appropriate subtab depending on the category with which the resource whose skill rating you wish to view is associated and then search for the resource using the Simple Search page. Categories include:
  - Employees
  - Parties
  - Partners
  - Supplier Contacts
2. Click the skills icon next to the resource in the search results page and then click the skills whose ratings you wish to view.

### See Also

Defining Your Skill Rating, page 12-4

## Making a Resource Web Available

The purpose of making a resource web available (or unavailable) is so they can instantly be assigned a task through the web. Using this functionality, logged in users can set whether or not web service requests can be assigned to them. In the Assignment Manager, a supervisor can view who is web available and make an appropriate decision.

**Note:** Whenever a resource is newly created or imported into the Resource Manager, they are web available by default.

### Prerequisites

None

## Responsibilities

Customer Support responsibility

## Navigation

Navigate to the Navigator - Customer Support window

## Steps

1. Select **Service Requests > Create Service Requests or Search Service Requests**.  
The Create Service Requests or Search Service Requests window opens.
2. Select **Tools > Web Available**.
3. Check the Available check box.

---

## Managing Group Resources

This chapter covers the following topics:

- Viewing Your Group Membership Information
- Defining Your Group Membership Information
- Defining Group Hierarchy
- Viewing Group Hierarchy
- Viewing Your Group Membership History

### Viewing Your Group Membership Information

Perform the following steps to view your group membership information.

#### Responsibility

CRM Application Foundation User

#### Steps

1. Navigate to the **Resources** tab, click the appropriate subtab depending on the category with which your personal information is associated and click the **Advanced Search** button. Categories include:
  - Employee
  - Party
  - Partner
  - Supplier Contact
2. Click your resource name in the search results page and then click the **Group**

**Membership** icon in the resulting page.

### See Also

- Defining Your Group Membership Information, page 13-2
- Defining Group Hierarchy, page 13-4
- Viewing Your Group Membership History, page 13-5

## Defining Your Group Membership Information

Maintaining group membership information is an essential function required by sales and service managers. By using the Group Detail window, a user with appropriate access (with either the Admin or Manager group member role) is able to maintain group information. These activities include: changing the group name, e-mail, effective date, the ability to add additional resources to a group with appropriate member roles, end date a resource's role and remove a resource's role.

Perform the following steps to define your group membership information.

**Note:** You should not modify an HTML Calendar in the Resource Manager or add either Calendar Group usages (PUBLIC CALENDAR or HTML GROUP CALENDAR) to a new or existing Resource Manager Group.

### Prerequisites

- Only a group member with a role of Admin or Manager can update group information. A member with these roles can add members to groups, add roles, add child groups to the groups hierarchy and perform these functions for any child groups. These roles do not enable a group member to create groups or change parent groups.
- The JTFRS: Group Update Access profile option must be set to None for a group member to be able to update group information.

### Responsibility

CRM Application Foundation User

### Steps

1. Navigate to the **Resources** tab, click the **Groups** subtab and then click the **Create** button.

2. Enter the required information in the Create Groups window including the name of the group and the date from which it becomes active.
3. Optionally enter the following information for the group:
  - **Description.** A description of the group.
  - **Time Zone.** Select a time zone for your group.
  - **Parent Group.** If you are creating a child group, use the search tool to locate the parent group to which it belongs.
  - **Email.** The group's email address.
  - **Active To.** The date on which the group is no longer active.
4. Optionally configure group membership information:
  - **Add members.** To add group members, click the **Add Members** button and use the search window to locate and select the desired resources.
  - **Assign roles to members.** Click the search icon next to each group member to locate and assign it the appropriate role.
  - **Move members.** Click the **Move Member** button on the Define Groups page to move a resource from one group to another.
  - **Dates active.** Use the Active To and Active From fields next to each member to optionally specify when it is active. The Active To field is required.
  - **Remove members.** Click the **Remove** icon next to each group member that you wish to remove.
5. Optionally specify the applications in which the group is used by clicking the **Used In** icon and entering the required information.
6. Optionally specify any child groups that belong to this group by clicking the **Child Group** icon and entering the required information. A child group cannot have overlapping date ranges with its parent group.

#### See Also

- Viewing Your Group Membership Information, page 13-1
- Defining Group Hierarchy, page 13-4
- Viewing Your Group Membership History, page 13-5

## Defining Group Hierarchy

To maintain group hierarchy information by selecting the Hierarchy hyperlink from the side navigation menu, a user with appropriate access (with either the Admin or Manager group member role) can add additional child or parent groups, as well as set an end date to an existing child or parent group.

The ability to define and maintain group hierarchy information is limited to users who are assigned the Admin or Manager role. In addition, the JTFRS: Group Update Access profile option must be set to None. The Admin or Manager role attribute can be identified by clicking the Go button to open the Select a Role window. These attributes are defined in the setup window. Perform the following steps to define your group hierarchy information.

- If the row contains a **Remove** check box, you can select the check box and update the window to delete the record. If the row contains a **Remove** icon, you can click it to clear the row.
- A person in a group with the role of Manager or Admin can change his or her role and group hierarchy information but not phone or address information.

### Responsibility

CRM Application Foundation User

### Steps

1. Navigate to the **Resources** tab click the **Groups** subtab and search for the group for which you wish to define group hierarchy.
2. In the search results page, click the **Update** icon next to the group whose hierarchy you wish to define.
3. Click the **Child Groups** icon, click the **Add Another Row** button and search for the group that you wish to add as a child group.
4. Specify the active dates for the child groups. A child group cannot have overlapping date ranges with its parent group.
5. Add as many rows as required and then click the **Apply** button.

### See Also

- Viewing Your Group Membership Information, page 13-1

- Defining Your Group Membership Information, page 13-2
- Viewing Your Group Membership History, page 13-5

## Viewing Group Hierarchy

The HTML version of the group hierarchy feature provides a more conceptual, graphical display of group hierarchy.

### Responsibility

- CRM Application Foundation User
- Resource Self Service Administrator (for administrative purposes)

### Steps

1. Navigate to the **Resources** tab, click the **Groups** subtab and search for the group whose hierarchy you wish to view.
2. In the search results page, click the **Show Hierarchy** icon next to the group whose hierarchy you wish to view.
3. You can optionally expand and collapse group hierarchy information by clicking the nodes in the Group Name column.
4. You can also view your group hierarchy by date. In the Group Hierarchy screen, enter a date and click **Go**. In the absence of a date, the group hierarchy is sorted based on the current date.

## Viewing Your Group Membership History

Perform the following steps to view your group membership history.

### Responsibility

CRM Application Foundation User

### Steps

1. Navigate to the **Resources** tab, click the **Groups** subtab and search for the group whose membership you wish to view.
2. In the search results page, click the group name and then click the **Members** icon.

**See Also**

- [Viewing Your Group Membership Information](#), page 13-1
- [Defining Your Group Membership Information](#), page 13-2
- [Defining Group Hierarchy](#), page 13-4

---

## Searching for Resources Groups and Teams

This chapter covers the following topics:

- Performing a Simple Search
- Performing an Advanced Search

### Performing a Simple Search

The simple search tool is the default start page for resources of category Employee, Party, Partner, and Supplier Contact as well as for Groups and Teams. To perform a simple search, navigate to the **Resources** tab and then click the appropriate subtab for the resource category, group or team you wish to locate. Enter the resource, group, or team name in the search field and click the **Go** button.

### Performing an Advanced Search

Perform the following to launch an advanced search for resources, groups, or teams:

**Note:** The Preferred Name field displays only if the value of the profile "JTFRS: Resource Lookup Audience" is "ADMIN".

#### Responsibility

CRM Application Foundation User

#### Steps

1. Navigate to the **Resources** tab click the appropriate subtab depending on the resource category, group or team you wish to locate and click the **Advanced Search** button. Categories include:
  - Employees

- Parties
  - Partners
  - Supplier Contacts
  - Groups
  - Teams
2. Enter the appropriate search criteria and click the **Go** button. Typically the advanced search feature includes several additional fields such as Manager, Email, or Active Dates.

---

## Reports and Processes

This section lists the reports and processes, including relevant request sets, that are seeded in Standard Request Submission for the Trading Community Manager responsibility.

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

### Reports

#### Customer Listing - Detail

Provides detail information about customers. See: Customer Listing Detail and Summary Reports, *Oracle Receivables User Guide*.

#### Customer Listing - Summary

Provides summary information about customers. See: Customer Listing Detail and Summary Reports, *Oracle Receivables User Guide*.

#### Customer Profiles Report

Provides customer profile information for customers or customer sites. See: Customer Profiles Report, *Oracle Receivables User Guide*

#### Customer Relationships Listing

Provides customer relationships information. See: Customer Relationships Listing, *Oracle Receivables User Guide*.

#### DNB 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, page 4-32.

### **Duplicate Customer Report**

Lists possible duplicate customers. See: Duplicate Customer Report, *Oracle Receivables User Guide*.

### **Duplicate DUNS Report**

Lists parties in the TCA Registry with the same D-U-N-S Number. See: Duplicate DUNS Report, page 4-31.

### **HZ Upgrade Script Report**

Provides details on scripts that were run during upgrade.

### **Import Batch De-Duplication Report**

Provides batch de-duplication results, or a preview if you run it before the actual import. See: Import Batch De-Duplication Report, page 2-12.

### **TCA Import Error Report**

Displays errors from bulk imports. See: Resolving Import Errors, page 2-18.

## **Processes**

### **Account to Party Relationships Migration Program**

Migrates account relationships to party relationships after upgrade.

### **Address Validation**

Validates addresses against known or authorized data sources. See: Batch Address Validation, page 5-6.

### **Automerge**

Resubmits previous Automerge processes that resulted in error. See: Automerge, *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*.

### **Create Merge Batch**

Resubmits previous merge batch creations that resulted in error. See: Creating Merge Batches, page 8-11.

### **Customer Interface**

Imports customer and account information. See: Importing Customers Using Customer Interface, page 3-18.

### **Customer Interface Master Conc Program**

Imports customer and account information using parallel workers. See: Importing Customers Using Customer Interface, page 3-18.

### **Customer Merge**

Merges duplicate customers and account information. See: Submitting the Merge Process, page 9-15.

### **Customer text data creation and indexing**

Indexes customer account data. See: Customer Text Data Creation and Indexing, *Oracle Trading Community Architecture Administration Guide*.

### **DQM : Generate XML Data for the Diagnostic Reports**

Generates a DQM diagnostic report. See: DQM: Generate XML Data for the Diagnostic Reports, *Oracle Trading Community Architecture Administration Guide*.

### **D&B Import Adapter**

Loads D&B information in batches. This is a request set. See: D&B Import Adapter, page 4-26.

### **DQM Compile All Rules**

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

### **DQM Index Optimization Program**

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

### **DQM Staging Program**

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

### **DQM Synchronization Program**

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

### **Generate key for fuzzy match**

Generates keys for fuzzy search.

### **Generate Request List for DNB 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, page 4-24.

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

Creates or updates time zone information for locations. See: Generate Time Zone for Locations, page 5-11.

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

Creates or updates time zone information for phone numbers. See: Generate Time Zone for Phone Numbers, page 5-11.

### **Import Batch to TCA Registry**

Imports parties from interface tables into the TCA Registry. See: Import Batch to TCA Registry, page 2-9.

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

Loads D&B information that was purchased online and corrected due to errors. See: Load D&B Data, page 4-22.

### **Locations Spatial Index Rebuild**

Rebuilds the spatial index on the HZ\_LOCATIONS table. See: Locations Spatial Index Rebuild, *Oracle Trading Community Architecture Administration Guide*.

### **Party Merge**

Resubmits previous party merges that resulted in error. See: Processing Merge Batches, page 8-17.

### **Person Names Migration Program**

Migrates person names after upgrade

### **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*.

### **Remove Protected HR Person Data From TCA Tables**

Removes protected Oracle Human Resources person data from the TCA tables.

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

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

### **Spatial Information for Locations Batch Update**

Acquires latitude and longitude values for locations in the TCA Registry. See: Spatial Information for Locations Batch Update, page 5-9.

### **TCA Business Object Events: Cleanse Infrastructure Program**

Maintains the TCA Business Object Event System by deleting unnecessary event data based on the HZ: Number of Days to Preserve Business Object Event Information profile option setting. See: Event Raising, *Oracle Trading Community Architecture Administration Guide*.

### **TCA Business Object Events: Generate Infrastructure Packages Program**

Dynamically generates infrastructure packages to determine and raise business object events. See: Event Raising, *Oracle Trading Community Architecture Administration Guide*.

### **TCA Business Object Events: Raise Events Program**

Raises business object events based on business object definition and TCA data. See: Event Raising, *Oracle Trading Community Architecture Administration Guide*.

### **TCA Import Batch Purge**

Purges batches from the import interface tables. See: TCA Import Batch Purge, page 2-19.

### **TCA Import Postprocessing**

Resubmits TCA Import Postprocessing runs that resulted in error. See: Postimport

Processes, page 2-17.

### **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*.

---

# Customizing Trading Community Architecture

This appendix covers the following topics:

- Trading Community Architecture User-Personalizable Pages

## Trading Community Architecture User-Personalizable Pages

A user-personalizable page is a Search page that allows end-users to create personalized views of their search results. Not all Search pages are user-personalizable. If a Search page is user-personalizable it renders a **Views** button in the Simple or Advanced Search panel. The **Views** button displays the Views panel that allows users to create or manage their personalized views. If no personalized view exists yet, the Search page may instead render a **Save Search** button that allows users to save their search criteria as a new personalized view. To learn more about user-personalizable pages, see *User-Level Personalization User Interface, Oracle Application Framework Personalization Guide*.

In addition to user-personalizable pages, LOV Choice Lists may also be personalized by end-users. A LOV Choice List is a hybrid between a poplist and a list of values. You may personalize a LOV Choice List if a **Personalize** button renders next to it.

**Important:** Make sure the **Disable Self-service Personal** profile option is set to **No** at the site or application level as appropriate for your page. If this is set to **Yes**, the **Views** option will not be accessible to your users.

Trading Community Architecture does not contain any user-personalizable pages or components.



---

## Customizing Resource Manager

This appendix covers the following topics:

- Resource Manager User-Personalizable Pages

### Resource Manager User-Personalizable Pages

A user-personalizable page is a Search page that allows end-users to create personalized views of their search results. Not all Search pages are user-personalizable. If a Search page is user-personalizable it renders a **Views** button in the Simple or Advanced Search panel. The **Views** button displays the Views panel that allows users to create or manage their personalized views. If no personalized view exists yet, the Search page may instead render a **Save Search** button that allows users to save their search criteria as a new personalized view. To learn more about user-personalizable pages, see User-Level Personalization User Interface, *Oracle Application Framework Personalization Guide*.

In addition to user-personalizable pages, LOV Choice Lists may also be personalized by end-users. A LOV Choice List is a hybrid between a poplist and a list of values. You may personalize a LOV Choice List if a **Personalize** button renders next to it.

**Important:** Make sure the **Disable Self-service Personal** profile option is set to **No** at the site or application level as appropriate for your page. If this is set to **Yes**, the **Views** option will not be accessible to your users.

This section lists the pages and LOV Choice Lists in Resource Manager that end users may personalize.

### User-Personalizable Pages

- **Home: Resources** page > Employees > **Resources** page
- **Home: Resources** page > Parties > **Resources** page

- **Home: Resources** page > Partners > **Resources** page
- **Home: Resources** page > Supplier Contacts > **Resources** page
- **Home: Resources** page > To Be Hired > **Resources** page
- **Home: Resources** page > Others > **Resources** page
- **Home: Resources** page > Groups > **Resources** page
- **Home: Resources** page > Teams > **Resources** page
- **Home: Setup** page > Resources > **Resources** tab > **Resources** page
- **Home: Setup** page > Roles > **Roles** page

---

## Standard Navigation Paths

This appendix covers the following topics:

- Standard Navigation Paths

### Standard Navigation Paths

Although your system administrator may have customized your navigator, typical navigation paths are shown in this table. Access all of these features through the Trading Community Manager responsibility.

Feature	Functionality	Navigation Path
Batch Duplicate Identification	Duplicate Identification: Batch Review	Data Quality Management > Duplicate Identification > Batch Review
Batch Duplicate Identification	Match Details	Data Quality Management > Duplicate Identification > Batch Review > View Match Details
Batch Duplicate Identification	Review Party Merge Batches	Data Quality Management > Duplicate Identification > Batch Review > Create Merge Set  Data Quality Management > Duplicate Identification > Batch Review > View Merge Set
Batch Duplicate Identification	Submit Duplicate Identification Batch	Data Quality Management > Duplicate Identification > Batch Definition

Feature	Functionality	Navigation Path
Customer Merge	Customers Merge	Data Quality Management > Account Merge
Party Merge	Merge Batch	Data Quality Management > Party Merge  Data Quality Management > Duplicate Identification > Batch Review > Create Merge Set > Go to Party Merge  Data Quality Management > Duplicate Identification > Batch Review > Create Merge Set > Submit Party Merge Batch
Relationship Manager	All	Trading Community > Relationships
Third Party Data Integration	D&B Online Purchase	Content Access and Integration > Dun and Bradstreet > Access/Purchase
Third Party Data Integration	Generate Request List for Batch Load	Content Access and Integration > Dun and Bradstreet > Generate Request List
Third Party Data Integration	Load D&B Data	Content Access and Integration > Dun and Bradstreet > Load

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# Index

## A

---

- adapters
  - address validation, 5-6
  - preimport address validation, 2-14
- address corrections, 2-14, 5-6
- addresses
  - entering and formatting process, 5-2
  - entering and real-time validation process, 5-4
  - formatting, 5-2
  - import interface tables and TCA tables, 2-8
  - mapping for Bulk Import, 2-15
  - validating in batch, 5-6
  - validating in real time, 5-3
- address formatting, 5-2
  - process, 5-2
- address styles
  - description, 5-2
- address uses
  - import interface tables and TCA tables, 2-8
- address validation, 5-3, 5-6
  - description, 5-1, 5-6
  - in Bulk Import, 2-14
- Address Validation program
  - description, 5-6
  - parameters, 5-6
- as of date
  - relationship hierarchy, 6-11
- attributes
  - description, 1-2
- Automerge
  - Registry de-duplication, 2-11, 2-13

## B

---

- batch address validation, 5-6
- batch de-duplication
  - description, 2-9
- batch duplicate identification
  - defining and submitting duplicate identification batches, 7-3
  - overview, 7-1
  - process, 7-1
  - reviewing duplicates and creating merge batches, 7-5
  - submitting merge batches, 7-9
- batch IDs
  - creating for import batches, 2-3
- BIR
  - See* Business Information Report
- Bulk Import, 2-1
  - overview, 2-1
  - process, 2-2
- Business Information Report (BIR)
  - description, 4-6
  - purchasing, 4-13
  - viewing, 4-30
- Business Verification Global Data Product, 4-4

## C

---

- CDH
  - See* Oracle Customer Data Hub (CDH)
- CDL
  - See* Oracle Customer Data Librarian (CDL)
- CDM

- See* Oracle Customer Data Management (CDM)
- circular relationships
  - description, 6-4
- classifications
  - import interface tables and TCA tables, 2-8
- combining
  - customer merge, 9-1
- Commercial Credit Score (USA) Global Data Product, 4-6
- contact, 1-2
- contact points
  - description, 1-2
  - import interface tables and TCA tables, 2-8
- contact roles
  - import interface tables and TCA tables, 2-8
- contacts
  - description, 1-2
  - import interface tables and TCA tables, 2-8
  - merging organization contacts, 8-15
- Create Import Batch API, 2-3
- Create Merge Batch program
  - description, 8-11
  - parameter, 8-12
- credit ratings
  - import interface tables and TCA tables, 2-8
- customer, 1-2
- customer account, 1-2
- Customer Account Merge
  - See* Customer Merge
- customer accounts
  - description, 1-2
  - entering and maintaining, 1-5
  - merging, 1-6
  - reports, 1-5
- customer account sites
  - description, 1-2
  - merging, 1-6
- Customer Interface
  - creating unique customer references, 3-17
  - data required, 3-6
  - importing customers, 3-18
  - import program, 3-3
  - overview, 3-1
  - preparing to run, 3-5
  - sample import, 3-13
  - source IDs of associated parties, 2-4

- tables updated, 3-11
  - transfer report, 3-20
  - using with Bulk Import, 2-4
  - validation rules, 3-3
- Customer Listing - Detail, 1-5
- Customer Listing - Summary, 1-6
- Customer Merge
  - description, 1-6, 8-1
  - example with Party Merge, 8-21
  - execution report, 9-17
  - merging customers, 9-1
  - merging different customers, 9-9
  - merging sites for same customer, 9-5
  - reviewing merged customers, 9-17
  - submitting, 9-15
- Customer Profiles Report, 1-6
- Customer Relationships Listing, 1-6
- customers
  - description, 1-1
  - entering and maintaining, 1-5
  - importing, 3-18
  - reports, 1-5
- Customers set of pages
  - process flow, 1-2
  - usage, 1-2

## D

---

### D&B

- automatically correcting values from, 4-17
- batch loading provided files, 4-26
- contact information, 4-3
- description, 4-3
  - See also* Third Party Data Integration
- investigations, 4-15
- mapping of data elements, 4-9
- Party Merge impact, 8-10
- rationalizing legacy data, 4-28
- transferring request list to, 4-26
- viewing information, 4-29
- D&B batch loading
  - generating request list, 4-24
  - loading data into interface tables, 4-26
  - overview, 4-22
  - process overview, 4-23
  - request list, 4-24
  - transferring request list to D&B, 4-26

- D&B File Load - Pass 1 program
  - parameters, 4-27
- D&B Flat File Upload Table Creation program
  - parameters, 4-27
- D&B hierarchy
  - Enterprise Management GDP, 4-5
  - examples, 6-14
  - postimport processes, 2-17
  - viewing, 6-13
- D&B Import Adapter request set
  - description, 4-26
  - impact on Import Batch to TCA Registry, 2-10
  - impact on other data loads, 2-2
  - parameters, 4-27
  - prerequisites, 4-26
- D&B load
  - See* D&B batch loading
- D&B Rating
  - definition, 4-7
- data elements
  - description, 4-7
  - mapping, 4-9
  - request list for D&B batch loading, 4-24
- data products
  - overview, 4-3
  - purchasing, 4-13
- Data Sharing and Security (DSS)
  - using for Bulk Import, 2-5
- data sources
  - viewing information from, 4-29
- Decision Support Global Data Product, 4-5
- Delinquency Score Global Data Product, 4-4
- description, 5-2
- DNB Global Data Products Request report
  - description, 4-32
  - parameters, 4-32
- DQM Batch Duplicate Identification program
  - description, 7-3
  - reviewing results, 7-5
- DSS
  - See* Data Sharing and Security (DSS)
- D-U-N-S Numbers
  - definition, 4-7
  - Enquiry, 4-9
  - mapped, 4-7
  - related parties, 4-9
  - same as related D-U-N-S Number, 4-9

- viewing duplicates, 4-31
- duplicate checking
  - determining merge or transfer, 8-5
- Duplicate Customer Report, 1-6
- Duplicate DUNS report
  - description, 4-31
  - parameters, 4-31
- duplicate identification batches
  - defining and submitting, 7-3
  - reviewing potential duplicates, 7-5
- duplicate parties
  - identifying in TCA Registry, 7-1, 8-11
  - merging, 8-1
- duplicate party sites
  - merging, 8-1

---

## E

- eLocations Spatial Data Integration
  - overview, 5-8
- Enquiry D-U-N-S Number, 4-9
- Enterprise Management Global Data Product, 4-5
- entities
  - description, 1-1, 1-2
- errors
  - Bulk Import, 2-18
  - Customer Interface Transfer report, 3-20
  - Mapping API utility, 4-17
- error tables
  - purging, 2-19
- examples
  - D&B hierarchy, 6-14
  - Party and Customer Account Merge, 8-21
  - Party Merge, 8-4
- execution reports
  - Customer Interface Transfer, 3-20
  - Customer Merge Execution report, 9-17
- extensions
  - merge details, 8-3

---

## F

- file loads, 2-2
- financial numbers
  - import interface tables and TCA tables, 2-8
- financial reports
  - import interface tables and TCA tables, 2-8
- Financial Standing Global Data Product, 4-5

## Flexible Address Formatting

- address formatting, 5-2
- real-time address validation, 5-3

## FND\_TERRITORIES table

- entering address, 5-4
- entering addresses, 5-2

## fuzzy keys

- postimport processes, 2-17

## G

---

### GDP

- See* Global Data Products (GDP)

### Generate Request List for DNB Batch Load program

- description, 4-24
- parameters, 4-25

### Generate Time Zone for Locations program

- description, 5-11
- parameters, 5-11

### Generate Time Zone for Phone Numbers program

- description, 5-11
- parameters, 5-12

### Geography Hierarchy

- real-time address validation, 5-3

### Global Data Products (GDP)

- Business Verification, 4-4
- Commercial Credit Score (USA), 4-6
- Decision Support, 4-5
- Delinquency Score, 4-4
- Enterprise Management, 4-5
- Financial Standing, 4-5
- Global Failure Risk Score, 4-5
- overview, 4-3
- Quick Check, 4-4
- Vendor Management, 4-6
- viewing purchased data elements, 4-29
- viewing request and purchase statistics, 4-32

### Global Failure Risk Score Global Data Product, 4-5

### group IDs

- correcting Mapping API utility errors, 4-17
- Load D&B Data parameter, 4-22, 4-24
- manually providing, 4-24

### grouping

- merging customers, 9-1

## H

---

### hierarchical relationships

- description, 6-3

### HZ\_CERTIFICATIONS table

- checking for duplicates, 8-8

### HZ\_CITIZENSHIP table

- checking for duplicates, 8-8

### HZ\_CODE\_ASSIGNMENTS table

- corresponding import interface table, 2-8
- Data Sharing and Security (DSS), 2-5

### HZ\_CONTACT\_POINTS

- unique IDs for import interface tables, 2-3

### HZ\_CONTACT\_POINTS table

- corresponding import interface table, 2-8
- Data Sharing and Security (DSS), 2-5
- flexfield validations, 2-5, 2-16
- Source System Management (SSM) mappings, 2-14

### HZ\_CREDIT\_RATINGS table

- corresponding import interface table, 2-8

### HZ\_DNB\_SOURCE\_DIR directory object, 4-26

### HZ\_EDUCATION table

- checking for duplicates, 8-8

### HZ\_EMPLOYMENT\_HISTORY table

- checking for duplicates, 8-8

### HZ\_FINANCIAL\_NUMBERS table

- corresponding import interface table, 2-8

### HZ\_FINANCIAL\_PROFILE table

- checking for duplicates, 8-8

### HZ\_FINANCIAL\_REPORTS table

- checking for duplicates, 8-7
- corresponding import interface table, 2-8

### HZ\_IMP\_ADDRESSES\_INT table

- matching addresses, 2-15
- parent and child relationships among interface tables, 2-9, 2-9
- primary flags, 2-7
- tables to import into, 2-8

### HZ\_IMP\_ADDRESSUSES\_INT table

- parent and child relationships among interface tables, 2-9
- primary flags, 2-7
- table to import into, 2-8

### HZ\_IMP\_CLASSIFICS\_INT table

- primary flags, 2-7

- table to import into, 2-8
- HZ\_IMP\_CONTACTPTS\_INT table
  - parent and child relationships among interface tables, 2-9
  - primary flags, 2-7
  - table to import into, 2-8
- HZ\_IMP\_CONTACTROLES\_INT table
  - parent and child relationships among interface tables, 2-9
  - table to import into, 2-8
- HZ\_IMP\_CONTACTS\_INT table
  - parent and child relationships among interface tables, 2-9
  - tables to import into, 2-8
- HZ\_IMP\_CREDITRTNGS\_INT table
  - table to import into, 2-8
- HZ\_IMP\_ERRORS table, 2-18
- HZ\_IMP\_FINNUMBERS\_INT table
  - parent and child relationships among interface tables, 2-9
  - table to import into, 2-8
- HZ\_IMP\_FINREPORTS\_INT table
  - parent and child relationships among interface tables, 2-9
  - table to import into, 2-8
- HZ\_IMP\_PARTIES\_INT table
  - parent and child relationships among interface tables, 2-9
  - tables to import into, 2-8
- HZ\_IMP\_RELSHIPS\_INT table
  - tables to import into, 2-8
- HZ\_INDUSTRIAL\_REFERENCE table
  - checking for duplicates, 8-7
- HZ\_LOCATIONS table
  - address formatting, 5-3
  - corresponding import interface table, 2-8
  - creating parties with D&B information, 4-10
  - flexfield validations, 2-5, 2-17
  - updating with spatial data, 5-8
- HZ\_ORG\_CONTACT\_ROLES table
  - corresponding import interface table, 2-8
- HZ\_ORG\_CONTACTS table
  - corresponding import interface tables, 2-8
  - Source System Management (SSM) mappings, 2-15
  - unique IDs for import interface tables, 2-3
- HZ\_ORGANIZATION\_INDICATORS table
  - checking for duplicates, 8-7
- HZ\_ORGANIZATION\_PROFILES table
  - corresponding import interface table, 2-8
  - creating parties with D&B information, 4-10
- HZ\_PARTIES table
  - corresponding import interface tables, 2-8
  - Data Sharing and Security (DSS), 2-5
  - flexfield validations, 2-5, 2-17
  - Source System Management (SSM) mappings, 2-14
  - unique IDs for import interface tables, 2-3
- HZ\_PARTY\_INTERFACE\_ERRORS table, 4-17, 4-17, 4-19, 4-20
- HZ\_PARTY\_INTERFACE table
  - loading D&B data, 4-17
  - loading D&B data using SQL\*Loader, 4-24
  - status values, 4-16
  - transferring data from, 4-22
- HZ\_PARTY\_SITE\_USES table
  - corresponding import interface table, 2-8
- HZ\_PARTY\_SITES table
  - corresponding import interface table, 2-8
  - creating parties with D&B information, 4-10
  - Data Sharing and Security (DSS), 2-5
  - Source System Management (SSM) mappings, 2-14
  - unique IDs for import interface tables, 2-3
- HZ\_PERSON\_INTEREST table
  - checking for duplicates, 8-8
- HZ\_PERSON\_LANGUAGE table
  - checking for duplicates, 8-8
- HZ\_PERSON\_PROFILES table
  - corresponding import interface table, 2-8
- HZ\_REFERENCES table
  - checking for duplicates, 8-8
- HZ\_RELATIONSHIPS table
  - corresponding import interface tables, 2-8
  - Data Sharing and Security (DSS), 2-5
  - flexfield validations, 2-6, 2-17
- HZ\_SECURITY\_ISSUED table
  - checking for duplicates, 8-7
- HZ\_WORK\_CLASS table
  - checking for duplicates, 8-8
- HZ: Allow Import of Records with Disabled Lookups profile option, 2-16
- HZ: Allow Updates of Address Records During Import profile option, 2-15

HZ: Character Value to Indicate NULL During Import profile option, 2-6  
HZ: Date Value to Indicate NULL During Import profile option, 2-6  
HZ: Numeric Value to Indicate NULL During Import profile option, 2-6  
HZ: Use Data Sharing and Security During Import profile option, 2-5  
HZ: Validate Flexfields During Import profile option, 2-5, 2-16

## I

---

Import Batch De-Duplication report  
    description, 2-12  
    parameter, 2-12  
    part of Bulk Import process, 2-2  
    previewing batch de-duplication results, 2-13, 2-13  
import batches  
    batch IDs, 2-3  
    D&B, 4-26  
    description, 2-2  
    purging, 2-19  
Import Batch to TCA Registry program  
    creating new parties for D&B rationalized legacy data, 4-28  
    description, 2-9  
    importing corrected records, 2-18  
    importing D&B information, 4-24  
    parameters, 2-10  
    prerequisites, 2-10  
    process, 2-12  
    when cannot run, 2-2  
import errors  
    resolving, 2-18  
importing  
    Customer Interface import program, 3-3  
    Customer Interface Transfer report, 3-20  
    customers, 3-1, 3-18  
    sample customer import, 3-13  
import validations, 2-16  
information subtab, 4-29  
insert through Bulk Import  
    description, 2-5  
    determining, 2-14  
interfaces

Customer Interface, 3-1, 3-18  
Customer Interface Transfer report, 3-20  
interface tables  
    list of each with corresponding TCA tables, 2-7  
    loading for Bulk Import, 2-2  
    parent and child relationships, 2-9  
    purging, 2-19  
    unique IDs for Bulk Import, 2-3  
investigations  
    requesting, 4-15

## L

---

legacy data  
    importing, 2-1  
    rationalizing by D&B and loading, 4-28  
Load D&B Data program  
    description, 4-22  
    importing corrected D&B data, 4-17  
    parameters, 4-22  
    prerequisites, 4-22  
local activity codes  
    validations, 4-21  
Local Business IDs, 4-7  
locations  
    description, 1-2  
    generating time zones for, 5-11  
    overview, 5-1

## M

---

mapped D-U-N-S Number, 4-7  
Mapping API utility  
    automatic correction of D&B values, 4-17  
    correcting errors, 4-17  
    description, 4-16  
mapping records  
    determining insert or update for Bulk Import, 2-14  
match rules  
    for batch de-duplication, 2-10  
    for Registry de-duplication, 2-11  
merge batches  
    creating, 8-11  
    description, 8-1  
    organization contacts, 8-15  
    parties, 8-12

- party relationships, 8-13
- party sites, 8-13
- party sites within a party, 8-16
- previewing results, 8-17
- processing, 8-17
- submitting, 8-17
- submitting from batch duplicate identification, 7-9
- viewing profile information, 8-15
- merge-from parties
  - deleting after merge, 8-11
  - description, 8-3
  - viewing profile information, 8-15
- merge-to parties
  - description, 8-3
  - viewing profile information, 8-15
- merging
  - Customer Merge Execution report, 9-17
  - customers, 9-1
  - merging sites for different customers, 9-9
  - merging sites for the same customer, 9-5
  - reviewing merged customers, 9-17
  - submitting customer merge, 9-15

## N

---

- navigation paths, D-1
- null values
  - updating with Bulk Import, 2-6

## O

---

- OCO
  - See* Oracle Customers Online (OCO)
- online purchasing
  - loading corrected D&B data, 4-22
  - overview, 4-10
  - process, 4-10
  - requesting investigations, 4-15
  - resolving errors and manually importing data, 4-17
  - searching TCA Registry, 4-12
  - searching the D&B database, 4-12
  - selecting data products or BIRs, 4-13
- open interfaces
  - Customer Interface, 3-1
- Oracle Customer Data Hub (CDH)
  - description, 1-4

- Oracle Customer Data Librarian (CDL)
  - description, 1-4
  - file loads, 2-2
  - purging parties, 1-6
  - resolving duplicates from Customer Interface, 2-1
  - System Duplicate Identification batches, 2-11, 2-13
- Oracle Customer Data Management (CDM), 1-4
- Oracle Customers Online (OCO)
  - description, 1-4
  - file loads, 2-2
- Oracle eLocations, 5-8
- Oracle Trading Community Architecture (TCA)
  - administering and implementing, 1-6
  - overview, 1-1
  - using, 1-5
- Organization Profile entity
  - description, 1-2

## P

---

- Parent Bankruptcy Chapter Conversion, 4-7
- parties
  - description, 1-1
  - enriching with third party data, 4-1
  - identifying duplicates, 7-1
  - importing, 2-1
  - import interface tables and TCA tables, 2-8
  - managing relationships among, 6-1
  - merging, 8-1
- party, 1-2
- Party and Customer Merge
  - overview, 8-20
- Party Contacts relationship group, 8-15
- Party Merge
  - example, 8-4
  - example with Customer Account Merge, 8-21
  - impact on D&B data, 8-10
  - merging versus transferring, 8-5
  - overview, 8-1
    - See also* merge batches
  - process, 8-2
  - source ID impact, 8-8
- Party Merge process
  - description, 8-1
  - identifying errors, 8-20

- parameter, 8-18
- program description, 8-17
- reviewing log, 8-18
- party numbers
  - maintaining uniqueness during Bulk Import, 2-6
- party site numbers
  - maintaining uniqueness during Bulk Import, 2-6
- party sites
  - description, 1-1
  - duplicates from Customer Interface, 2-1
  - merging, 8-3, 8-13
  - merging within a party, 8-16
- party types
  - description, 1-1
  - in Relationship Manager, 6-1
- personalizable pages
  - user, B-1
- person names
  - postimport processes, 2-17
- Person Profile entity
  - description, 1-2
- phone numbers
  - generating time zones for, 5-11
  - postimport processes, 2-17
- postimport errors
  - resolving, 2-18
- postimport processes, 2-17
- preimport processes
  - description, 2-9
- primary flags
  - description, 2-7
  - specifying with Bulk Import, 2-7
- profile options
  - HZ: Allow Import of Records with Disabled Lookups, 2-16
  - HZ: Allow Updates of Address Records During Import, 2-15
  - HZ: Character Value to Indicate NULL During Import, 2-6
  - HZ: Date Value to Indicate NULL During Import, 2-6
  - HZ: Numeric Value to Indicate NULL During Import, 2-6
  - HZ: Use Data Sharing and Security During Import, 2-5

- HZ: Validate Flexfields During Import, 2-5, 2-16
- programs
  - Address Validation, 5-6
  - Create Merge Batch, 8-11
  - Customer Interface, 3-18, 4-29
  - Customer Merge, 9-15
  - D&B File Load - Pass 1, 4-27
  - D&B Flat File Upload Table Creation, 4-27
  - DQM Batch Duplicate Identification, 7-3
  - Generate Request List for DNB Batch Load, 4-24
  - Generate Time Zone for Locations, 5-11
  - Generate Time Zone for Phone Numbers, 5-11
  - Import Batch to TCA Registry, 2-2, 2-9, 2-18, 4-24, 4-28
  - list of, A-1
  - Load D&B Data, 4-17, 4-22
  - Party Merge, 8-1, 8-17
  - Spatial Information for Locations Batch Update, 5-9
  - TCA Import Batch Purge, 2-19
  - TCA Import Postprocessing, 2-17, 2-18

## Q

---

- Quick Check Global Data Product, 4-4

## R

---

- rationalized legacy data
  - loading, 4-28
- real time address validation
  - use cases, 5-5
- real-time address validation
  - description, 5-3
  - process, 5-4
- Registry de-duplication
  - description, 2-9
- Registry IDs
  - description, 1-1
- relationship
  - account relationship, 1-2
  - party relationship, 1-2
- relationship date ranges
  - changing, 6-10
  - description, 6-3
- relationship groups

- description, 6-3
- relationship hierarchies
  - D&B hierarchy, 6-13
  - description, 6-4
  - viewing, 6-11
- Relationship Manager
  - major features, 6-4
  - overview, 6-1
  - process, 6-5
- relationship phrase and role pairs
  - description, 6-2
- relationship phrase pairs
  - See* relationship phrase and role pairs
- relationship phrases
  - changing, 6-10
  - description, 6-2
- relationship role pairs
  - See* relationship phrase and role pairs
- relationship roles
  - description, 6-2
- relationships
  - changing in hierarchy, 6-17
  - creating, 6-8
  - editing, 6-10
  - ending, 6-10
  - import interface tables and TCA tables, 2-8
  - merging, 8-13
  - overview, 6-2
  - postimport processes, 2-17
  - searching for parties to manage, 6-7
  - viewing, 6-8
  - viewing information for parties, 6-7
- relationship types
  - description, 6-3
- reports
  - Customer Interface Transfer, 3-20
  - Customer Listing - Detail, 1-5
  - Customer Listing - Summary, 1-6
  - Customer Merge Execution report, 9-17
  - Customer Profiles, 1-6
  - Customer Relationships Listing, 1-6
  - DNB Global Data Products Request, 4-32
  - Duplicate Customer, 1-6
  - Duplicate DUNS, 4-31
  - Import Batch De-Duplication, 2-2, 2-12, 2-13, 2-13
  - list of, A-1

- TCA Import Error, 2-18
- request sets
  - D&B Import Adapter, 2-2, 2-10, 4-26
- responsibilities
  - Trading Community Manager, 1-5, 1-6, D-1

## S

---

- SIC codes
  - validations, 4-21
- Single Source of Truth (SST)
  - displaying third party data, 4-1
  - making D&B information available for, 4-23, 4-24
  - viewing, 4-29
- sites/addresses
  - account site, 1-2
  - customer address, 1-2
  - location, 1-2
  - party site, 1-2
- source IDs
  - description, 8-8
  - D-U-N-S Numbers, 4-7
  - importing associated accounts, 2-4
  - unique IDs for import interface tables, 2-3
- Source System Management (SSM)
  - determining insert or update for Bulk Import, 2-14
  - impact on D&B data, 4-7
  - unique IDs for import interface tables, 2-3
- spatial data
  - acquiring, 5-9
  - description, 5-8
- Spatial Information for Locations Batch Update program
  - description, 5-9
  - parameters, 5-9
- SQL/ETL load, 2-2
- SQL\*Loader
  - loading D&B file, 4-24
- SSM
  - See* Source System Management
- SST
  - See* Single Source of Truth (SST)
- staging tables
  - purging, 2-19
- standard navigation paths, D-1

System Duplicate Identification (SDI) batches  
creating from Registry de-duplication, 2-11, 2-13

## T

---

### tables

FND\_TERRITORIES, 5-2, 5-4  
HZ\_CERTIFICATIONS, 8-8  
HZ\_CITIZENSHIP, 8-8  
HZ\_CODE\_ASSIGNMENTS, 2-5, 2-8  
HZ\_CONTACT\_POINTS, 2-3, 2-5, 2-5, 2-8, 2-14, 2-16  
HZ\_CREDIT\_RATINGS, 2-8  
HZ\_EDUCATION, 8-8  
HZ\_EMPLOYMENT\_HISTORY, 8-8  
HZ\_FINANCIAL\_NUMBERS, 2-8  
HZ\_FINANCIAL\_PROFILE, 8-8  
HZ\_FINANCIAL\_REPORTS, 2-8, 8-7  
HZ\_IMP\_ADDRESSES\_INT, 2-7, 2-8, 2-9, 2-9, 2-15  
HZ\_IMP\_ADDRESSUSES\_INT, 2-7, 2-8, 2-9  
HZ\_IMP\_CLASSIFICS\_INT, 2-7, 2-8  
HZ\_IMP\_CONTACTPTS\_INT, 2-7, 2-8, 2-9  
HZ\_IMP\_CONTACTROLES\_INT, 2-8, 2-9  
HZ\_IMP\_CONTACTS\_INT, 2-8, 2-9  
HZ\_IMP\_CREDITRTNGS\_INT, 2-8  
HZ\_IMP\_ERRORS, 2-18  
HZ\_IMP\_FINNUMBERS\_INT, 2-8, 2-9  
HZ\_IMP\_FINREPORTS\_INT, 2-8, 2-9  
HZ\_IMP\_PARTIES\_INT, 2-8, 2-9  
HZ\_IMP\_RELSHIPS\_INT, 2-8  
HZ\_INDUSTRIAL\_REFERENCE, 8-7  
HZ\_LOCATIONS, 2-5, 2-8, 2-17, 4-10, 5-3, 5-8  
HZ\_ORG\_CONTACT\_ROLES, 2-8  
HZ\_ORG\_CONTACTS, 2-3, 2-8, 2-15  
HZ\_ORGANIZATION\_INDICATORS, 8-7  
HZ\_ORGANIZATION\_PROFILES, 2-8, 4-10  
HZ\_PARTIES, 2-3, 2-5, 2-5, 2-8, 2-14, 2-17  
HZ\_PARTY\_INTERFACE, 4-16, 4-17, 4-22, 4-24  
HZ\_PARTY\_INTERFACE\_ERRORS, 4-17, 4-17, 4-19, 4-20  
HZ\_PARTY\_SITE\_USES, 2-8  
HZ\_PARTY\_SITES, 2-3, 2-5, 2-8, 2-14, 4-10  
HZ\_PERSON\_INTEREST, 8-8  
HZ\_PERSON\_LANGUAGE, 8-8

HZ\_PERSON\_PROFILES, 2-8  
HZ\_REFERENCES, 8-8  
HZ\_RELATIONSHIPS, 2-5, 2-6, 2-8, 2-17  
HZ\_SECURITY\_ISSUED, 8-7  
HZ\_WORK\_CLASS, 8-8  
updated by Customer Interface, 3-11

### tax assignments

postimport processes, 2-18

### tax validation

merging addresses, 9-4

### TCA

*See* Oracle Trading Community Architecture

### TCA Import Batch Purge program

description, 2-19

parameters, 2-19

### TCA Import Error report

description, 2-18

### TCA Import Postprocessing program

description, 2-17

parameters, 2-18

resolving errors, 2-18

### TCA Registry

description, 1-1

### Third Party Data Integration, 4-1

creating parties with D&B information, 4-10

DNB Global Data Products Request report, 4-32

Duplicate DUNS report, 4-31

loading rationalized legacy data, 4-28

overview, 4-1

Source System Management impact, 4-7

viewing information from data sources, 4-29

### time zones

generating for locations, 5-11

generating for phone numbers, 5-11

postimport processes, 2-17

### Trading Community Architecture

*See* Oracle Trading Community Architecture

user-personalizable pages, B-1

### Trading Community Architecture

### User-Personalizable Pages, B-1

Trading Community Manager responsibility, 1-5, 1-6, D-1

transferring party sites, 8-3

## U

---

- unique IDs for interface tables, 2-3, 2-14
- update through Bulk Import
  - description, 2-5
  - determining, 2-14
- use cases
  - real time address validation, 5-5
- user-personalizable pages
  - Trading Community Architecture, B-1

## **V**

---

- validations
  - Bulk Import, 2-16
  - Customer Interface validation rules, 3-3
- validation status codes, 5-8
- Vendor Management Global Data Product, 4-6

