Oracle® Customer Data Librarian

User Guide

Release 11*i*

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Oracle Customer Data Librarian User Guide, Release 11*i*

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Primary Author: Essan Ni

Contributor: Alan Adams, Michael Brantley, Arthur Hung, Shannon Kreps, Jocelyn Lin, Ronda Pitts, Adam Stafford, Matt Stitz

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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Customer Data Librarian User Guide*.

This guide contains the information needed to use Oracle Customer Data Librarian to establish and maintain the quality of the TCA Registry, focusing on consolidation, cleanliness, and completeness. Oracle Customer Data Librarian has all of the features in Oracle Customers Online, and is also part of the Oracle Customer Data Management product family.

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Structure

1 Overview

This chapter provides an overview of Oracle Customer Data Librarian.

2 De-Duplication

This chapter describes how to resolve duplicate parties or duplicate information within a party.

3 Party Purge

This chapter describes how to permanently purge parties.

4 Party Maintenance

This chapter describes how to maintain parties.

5 Import

This chapter describes how to import data from legacy, third party, or other external data sources.

Related Documents

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

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation:** See the Oracle Applications Documentation Library CD for current PDF documentation for your product with each release. The Oracle Applications Documentation Library is also available on Oracle*MetaLink* and is updated frequently.

- **Online Help:** Online help patches (HTML) are available on Oracle*MetaLink*.

- **About Documents:** Refer to the About Document for the mini-pack or family pack that you have installed to learn about new documentation or documentation patches that you can download. About Documents are available on Oracle*MetaLink*.

Guides Related to All Products

- **Oracle Applications User's Guide:** This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes. You can access this user's guide online by choosing *Getting Started with Oracle Applications* from any Oracle Applications help file.

Guides Related to This Product

- **Oracle Customer Data Librarian Implementation Guide:** This guide describes how to implement Oracle Customer Data Librarian. As part of implementing Customer Data Librarian, you must also complete all the implementation steps for Oracle Customers Online.

- **Oracle Customers Online User Guide:** This guide describes how to use Oracle Customers Online to view, create, and maintain your customer information. Oracle Customers Online is based on Oracle Trading Community Architecture data model and functionality, and is also part of the Oracle Customer Data Management product family.

- **Oracle Customers Online Implementation Guide:** This guide describes how to implement Oracle Customers Online.

- **Oracle Trading Community Architecture Administration Guide:** This guide describes how to administer and implement Oracle Trading Community Architecture. You set up, control, and manage functionality that affect data in the TCA Registry.

- **Oracle Trading Community Architecture Reference Guide:** This reference guide contains seeded relationship types, seeded Data Quality Management data, D&B data elements, Bulk Import interface table fields and validations, and a comprehensive glossary. This guide supplements the documentation for Oracle Trading Community Architecture and all products in the Oracle Customer Data Management family.

- **Oracle Trading Community Architecture User Guide:** Use this guide to learn about Oracle Trading Community Architecture and how to use features from the Trading Community Manager responsibility to create, update, enrich, and cleanse the data in the TCA Registry.

- **Oracle Common Application Components User's Guide:** This document covers how to use various components in Oracle Customer Data Librarian, such as features for notes, tasks, calendars, and employees.

- **Oracle Customer Interaction History Implementation Guide:** This guide provides information on interactions, which you can view from Oracle Customer Data Librarian.

- **Oracle Receivables User Guide:** This guide provides information on accounts, credit summaries, debit items, and credit items, which you can view from Oracle Customer Data Librarian.

- **Oracle Collections User Guide:** This guide provides information on broken promises and delinquencies, which you can view from Oracle Customer Data Librarian.

- **Oracle Install Base User Guide:** This guide provides information on installed base, which you can view from Oracle Customer Data Librarian.

- **Oracle Leads Management Implementation and Administration Guide:** This guide provides information on leads, which you can view from Oracle Customer Data Librarian.

- **Oracle Marketing User Guide:** This guide provides information on campaigns and events, which you can view from Oracle Customer Data Librarian.

- **Oracle Order Management User's Guide:** This guide provides information on orders, which you can view from Oracle Customer Data Librarian.

- **Oracle Quoting User Guide:** This guide provides information on quotes, which you can view from Oracle Customer Data Librarian.

- **Oracle Field Sales User Guide:** This guide provides information on opportunities, which you can view from Oracle Customer Data Librarian.

- **Oracle Sales User Guide:** This guide provides information on opportunities, which you can view from Oracle Customer Data Librarian.

- **Oracle TeleSales User Guide:** This guide provides information on opportunities, which you can view from Oracle Customer Data Librarian.

- **Oracle TeleService User Guide:** This guide provides information on service requests, which you can view from Oracle Customer Data Librarian.

- **Oracle Trading Community Architecture Technical Implementation Guide:** Use this technical implementation guide to learn how to use the public Oracle Trading Community Architecture application programming interfaces (APIs) and develop callouts based on Oracle Workflow Business Events System (BES). For each API, this guide provides a description of the API, the PL/SQL procedure, and the Java method, as well as a table of the parameter descriptions and validations. For each BES callout, this guide provides the name of the logical entity, its description, and the ID parameter name. Also included are setup instructions and sample code.

Installation and System Administration

- **Oracle Applications Concepts:** This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before installing Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

- **Installing Oracle Applications: A Guide to Using Rapid Install:** This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

- **Upgrading Oracle Applications:** Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

- **Maintaining Oracle Applications Documentation Set:** Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle Applications file system and database.

- **Oracle Applications System Administrator's Documentation Set:** This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

- **Oracle Alert User's Guide:** This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

- **Oracle Applications Flexfields Guide:** This manual provides flexfields planning, setup, and reference information, as well as information on creating custom reports on flexfields data.

Other Implementation Documentation

- **Oracle Applications Product Update Notes:** Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

- **Oracle Workflow Administrator's Guide:** This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

- **Oracle Workflow Developer's Guide:** This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

- **Oracle Workflow User's Guide:** This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

- **Oracle Workflow API Reference:** This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

- **Oracle Applications Developer's Guide:** This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

- **Oracle eTechnical Reference Manuals:** Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications and integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*MetaLink*.

- **Oracle Applications User Interface Standards for Forms-Based Products:** This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and tells you how to apply this UI to the design of an application built by using Oracle Forms.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

1

Overview

This chapter provides an overview of Oracle Customer Data Librarian.

This chapter covers the following topics:

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

Introduction to Oracle Customer Data Librarian

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

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

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

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

Customer Data Quality

- **Consolidation**

  - Import customer data from external sources into the TCA Registry.

  - Map records between external source systems and the TCA Registry, to tie customer information from multiple sources to the Registry and maintain a single, enterprise-wide view of your customer information.

- **Cleanliness**

- Resolve duplicate parties within the TCA Registry, as well as duplicate information within a party.

- Permanently purge parties from the TCA Registry.

- Maintain party information such as status, internal indicator, and certification level.

- **Completeness**

  - Enrich customer data with information from third party data sources, such as D&B.

Related Topics

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

Major Features of Oracle Customer Data Librarian

These features are available only in Oracle Customer Data Librarian.

- Data Quality tab

  - **Merge Requests** and **System Duplicate Identification:** Merge duplicate parties and cleanse single parties, page 2-1.

  - **Purge Requests:** Permanently purge parties, page 3-1.

  - **Party Maintenance:** Maintain party information such as certification and status, page 4-1.

- Import tab

  - **Batch Import:** Transfer data from import interface tables into the TCA Registry, page 5-2.

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

Within the Customers Online features, functionality available only to Oracle Customer Data Librarian include:

- In the Recent Items bin, you can see and access the last few merge and purge requests that you viewed. See: Recent Items, *Oracle Customers Online User Guide*.

- In the File Loads feature, you can search for file loads and mappings by creator. See Import Overview, page 5-1.

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

Related Topics

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

Introduction to Oracle Customer Data Librarian, page 1-1

2

De-Duplication

This chapter describes how to resolve duplicate parties or duplicate information within a party.

This chapter covers the following topics:

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

De-Duplication Overview

Use de-duplication to:

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

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

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

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

- **Identify duplicates:** Create merge requests, which contain information about the duplicate parties that you want to merge or the party that you want to cleanse.
- **Automatically merge duplicates:** Optionally run Automerge to automatically merge parties identified as definite duplicates. Automerge bypasses manually creating, mapping, and submitting merge requests.
- **Manage merge requests:** Review, assign, and reject specific requests.

- **Map merge requests:** Determine the results of the merge by specifying the information that remains after the merge. You map the duplicate information to merge either among parties or within the party that you are cleansing.

- **Submit merge requests:** Run the Party Merge process to perform the actual merge, either for duplicate parties or within a party to cleanse it.

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

Related Topics

Introduction to Oracle Customer Data Librarian, page 1-1

Major Features of De-Duplication, page 2-2

Examples, page 2-3

Major Features of De-Duplication

System Duplicate Identification

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

Automerge

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

Merge Request Creation

You can create two types of merge requests:

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

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

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

Merge Request Management

Aside from reviewing merge requests, you can:

- Assign requests to specific users

- Unassign requests

- Reject requests

Merge Request Mapping and Submission

For each merge request, you map the duplicate information to determine the results of the merge. For both Single and Multiple type requests, you map address and relationship information. De-duplication can provide default suggestions for either mapping.

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

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

Related Topics

De-Duplication Overview, page 2-1

Examples

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

Related Topics

De-Duplication Overview, page 2-1

Merging Multiple Parties

Create Merge Request

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

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

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

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

Map Party Profile Attributes

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

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

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

Map Addresses and Relationships

You decide to use the default mapping suggestions:

- Address 1 and 7 are duplicates, and Address 1 is the master address that remains after the merge.

- Address 2 and 3 are duplicates, with Address 2 as the master.

- Address 4, 5, and 9 are duplicates, with Address 9 as the master.

- Address 6 is not a duplicate and should transfer to Party D after the merge.

- Address 8 is not a duplicate and should remain in Party D.

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

- Address 1, which Address 7 merged into

- Address 2, which Address 3 merged into

- Address 6, which transferred to Party D

- Address 8, which remained in Party D

- Address 9, which Address 4 and 5 merged into

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

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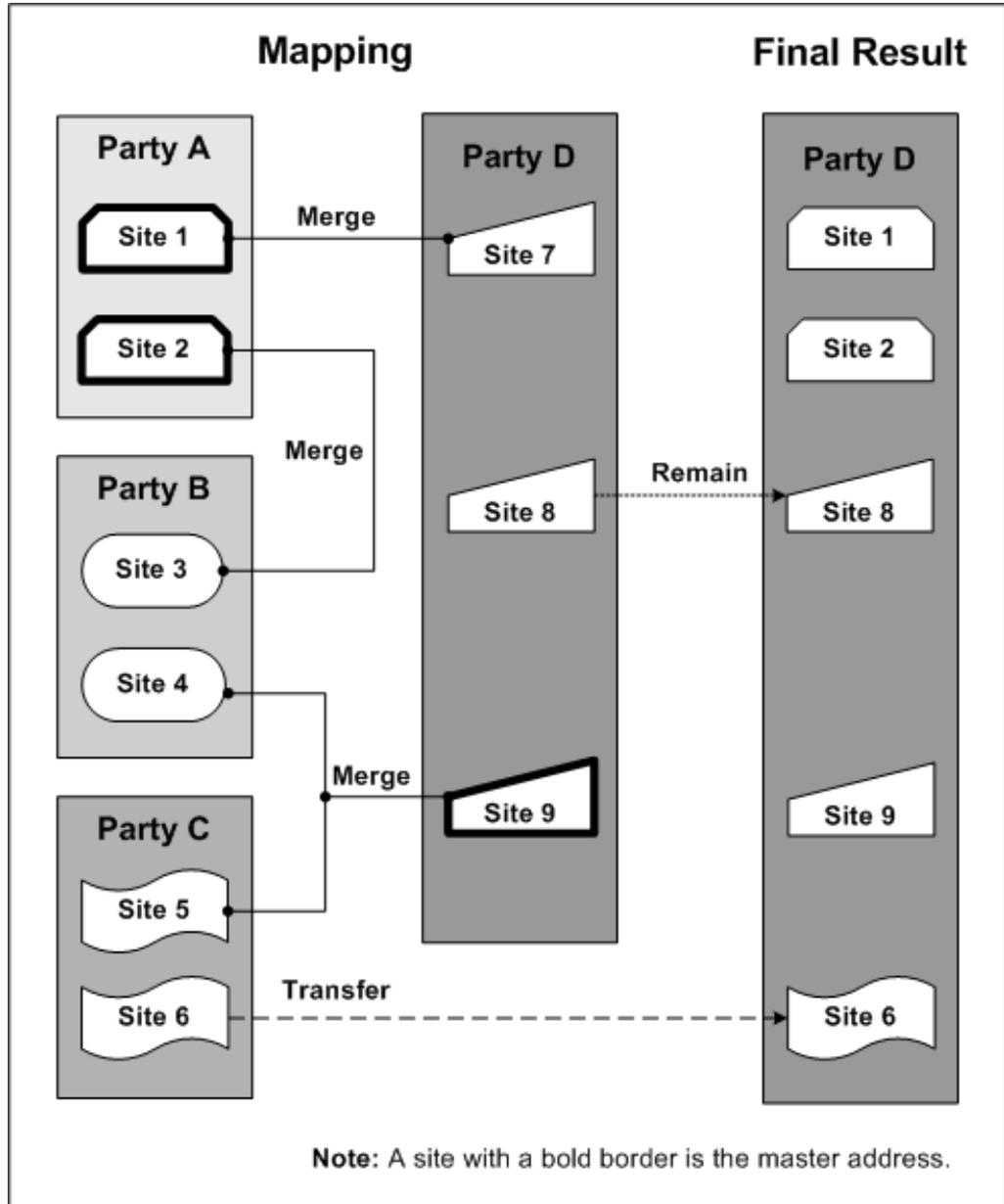
Note: Address 7 merged into Address 1, which remained after the merge even though Address 7 is the site from Party D. De-duplication lets you specify the master address no matter if it is from the master party or not.

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

Cleansing a Party

Create Merge Request

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

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

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

Map Addresses and Relationships

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

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

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

As a result, these employees remain after the merge:

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

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

System Duplicate Identification

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

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

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

You can use any of the duplicate sets in an SDI batch as the basis of a new merge request. See: Merge Requests Overview, page 2-11 and Creating Merge Requests, page 2-13.

From the System Duplicate Identification Batches page, you can:

- **Create New Batch:** See: Creating System Duplicate Identification Batches, page 2-8.

- **Phase:** Review the details of the DQM Duplicate Identification program, for example the error log.

- **Detail:** See: Reviewing System Duplicate Identification Batches, page 2-9. You can also create merge requests based on duplicate sets from the SDI batch you are reviewing. See: System Duplicates, page 2-15.

- **View Report:** See: Viewing System Duplicate Identification Batch Reports, page 2-9.

- **Create Merge Request** Create merge requests using any method in the bin. See: Creating Merge Requests, page 2-13.

- **Administration:** Manage the list of parties marked as not duplicates of selected parties. See: Administering Nonduplicate Mappings, page 2-10.

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

- **Batch Name:** The name of the batch.

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

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

  - Running

  - Pending

  - Inactive

  - Completed

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

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

The search results provide additional information about the SDI batches:

- **Status:** Status of the phase of the DQM Duplicate Identification program, for example Normal or Error.

- **Source**

  - *Import:* Batch was created as a result of Registry de-duplication during an import process. If Automerge was part of the de-duplication, the batch contains only the parties that were automatically merged.

  - *Import AM:* Batch was created as a result of Registry de-duplication, with Automerge, for an import process. This batch contains only parties that were not automatically merged.

    See: Registry De-Duplication, page 5-6.

- *System:* User manually created the batch. If Automerge was part of the batch creation, the batch contains only the parties that were automatically merged.

- *System AM:* Batch was created as a result of Automerge run as part of creating a batch. This batch includes only parties that were not automatically merged.

  See: Automerge in System Duplicate Identification, page 2-8.

- **Automerge:** Batch contains duplicate sets that were automatically merged, when Automerge was run as part of:

  - Creating the SDI batch. See: Automerge in System Duplicate Identification, page 2-8.

  - Registry de-duplication for an import process. See: Registry De-Duplication, page 5-6.

Related Topics

De-Duplication Overview, page 2-1

Creating System Duplicate Identification Batches

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

- The Data Quality Management match rule that you specify. See: Match Rules Overview, *Oracle Trading Community Architecture Administration Guide*.

- Your conditions for a subset of parties to use for identifying duplicates. For example, you can specify that the Registry ID must be less than 1001. A party must comply with all conditions to be considered for the SDI batch.

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

Automerge in System Duplicate Identification

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

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

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

After the duplicate sets are identified for the batch, Automerge automatically merges the sets in which all parties have match scores that exceed the automatic merge threshold defined in your selected match rule. Merge requests are automatically created with these duplicate sets. You can view and track these Automerge merge requests in the

Merge Request Queue, as well as resubmit failed Automerge processes. See: Merge Requests Overview, page 2-11.

If any party in an Automerge merge request already exists in another merge request, the request would result in error. Even if one request fails, the other requests from the same SDI batch would continue to process accordingly.

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

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

Related Topics

Resubmitting Requests, page 2-13

System Duplicate Identification, page 2-6

Reviewing System Duplicate Identification Batches

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

Subset for Identifying Duplicates specifies filtering criteria used to create the SDI batch, if any. See: Creating System Duplicate Identification Batches, page 2-8.

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

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

You can also update duplicate sets only, or create a merge request using the duplicate set you are updating. See: System Duplicates, page 2-15.

Related Topics

System Duplicate Identification, page 2-6

Viewing System Duplicate Identification Batch Reports

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

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

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

Duplicates Per Customer Record	Frequency	Percentage
5	36	50

Configuring the Report

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

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

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

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

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

Related Topics

System Duplicate Identification, page 2-6

Administering Nonduplicate Mappings

Parties are marked as nonduplicates of other parties as part of creating merge requests from System Duplicate Identification batches, or just updating duplicate sets in SDI batches. Nonduplicate mappings ensure that the parties are not selected as duplicate candidates in the future. See: System Duplicates, page 2-15.

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

- To make the mapped parties available to be selected as duplicates again.

- To update the duration of the nonduplicate mapping.

- So that the two parties to be always mapped as not duplicates of each other.

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

Related Topics

System Duplicate Identification, page 2-6

Merge Requests Overview

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

- The party or parties involved in the merge

- The intended results of the merge

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

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

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

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

Merge Request Queue

Start at the Merge Request Queue page to:

- **Create Request** or **Create Merge Request:** See: Creating Merge Requests, page 2-13.

- **Merge Request Name:** See: Reviewing Merge Requests, page 2-16.

- **Assign:** Assign and unassign merge requests of any phase, no matter whom the request is currently assigned to or who created the request.

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

- **Reprocess:** Reprocess selected merge requests to regenerate default master records, as well as default profile attributes and default relationship and address groupings for mapping. You might want to reprocess, for example, if you change profile option settings or match rules that affect merge requests.

- **Map:** Map and submit merge requests, or reject the request. See: Mapping Merge Requests, page 2-16.

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

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

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

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

- **Status:** If the request has a status of Submitted for Merge, Completed, or Error, you can see details of the Party Merge process, for example the error log.

- **Resubmit Requests:** Rerun processes that originally resulted in error. See: Resubmitting Requests, page 2-13.

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

- **Merge ID:** The merge request ID.

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

- **Source:** The method used to create the merge request.

  - *Import:* Manually from a System Duplicate Identification batch that import Registry de-duplication created. If Automerge was part of the de-duplication, then the merge request was automatically created to contain a duplicate set that was automatically merged.

  - *Import AM:* Manually from a SDI batch that resulted from import Registry de-duplication with Automerge. The batch contains the duplicate sets that were not automatically merged.

    See: Registry De-Duplication, page 5-6.

  - *System AM:* Manually from a SDI batch that resulted from creating a batch with Automerge. The batch that contains only parties that were not automatically merged was used to create this merge request.

    See: Automerge in System Duplicate Identification, page 2-8.

  - *System:* Manually from a SDI batch that was also manually created. If Automerge was part of the batch creation, then the merge request was automatically created to contain a duplicate set that was automatically merged.

  - *User:* Using Smart Search, Registry ID selection, or other manual user selection.

- **Phase:** The mapping phase of the request, which corresponds to the Status column in the table.

  - *AM Queue:* Request is in the queue to be automatically merged by the Automerge program.

  - *Completed:* Party Merge process successfully completed.

  - *Error:* Party Merge process resulted in error.

  - *Mapping:* Request has been modified since creation.

  - *Preprocess:* Create Merge Batch process is running to create or regenerate the request, which is not yet ready for mapping.

  - *Rejected:* Request has been rejected.

  - *New:* Create Merge Batch process has successfully completed, and the request has not been modified since but is ready for mapping.

  - *Submitted:* Request has been submitted for the Party Merge process.

> **Tip:** Refresh the status to see the latest values.

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

Resubmitting Requests

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

For merge requests that are automatically created and then merged, as part of System Duplicate Identification batch creation, you can also resubmit Automerge processes that resulted in error. For the Batch parameter, select the SDI batch ID that the merge request originates from. See: Automerge in System Duplicate Identification, page 2-8 and Automerge, *Oracle Trading Community Architecture Administration Guide*.

Creating Merge Requests

You can create merge requests:

- **Registry ID:** By selecting specific parties. See: Registry ID, page 2-14.

  From a Registry ID list of values, you select at least one party to include in your new merge request.

- **Smart Search:** Using Smart Search to find potential duplicates. See: Smart Search, page 2-14.

  Smart Search provides a list of parties based on your criteria. You select at least one party to include in a new merge request.

- **System Duplicates:** From duplicate sets in a System Duplicate Identification (SDI) batch. See: System Duplicates, page 2-15.

  A SDI batch contains sets of duplicates that de-duplication identifies based on your criteria for the batch. You select duplicate sets from any batch to create one or more merge requests. See: System Duplicate Identification, page 2-6.

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

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

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

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

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

For merge requests of type Multiple, the HZ: Merge Master Party Defaulting profile option determines the master party, which remains after the merge. You can change the master party when you map the merge request. See: Request Summary, page 2-18.

Related Topics

Merge Requests Overview, page 2-11

Registry ID

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

> **Tip:** From either the Merge Request Queue or System Duplicate Identification Batches page, you can also click Registry ID in the Create Merge Request bin.

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

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

Related Topics

Creating Merge Requests, page 2-13

Smart Search

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

> **Tip:** From either the Merge Request Queue or System Duplicate Identification Batches page, you can also click Smart Search in the Create Merge Request bin.

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

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

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

Related Topics

Creating Merge Requests, page 2-13

System Duplicates

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

- **Merge Request Queue:** Select the System Duplicates method for the Create Request field. Search for and select the SDI batch to use.

- **System Duplicate Identification Batches:** Review the batch that you want to use. See: Reviewing System Duplicate Identification Batches, page 2-9.

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

Subset for Identifying Duplicates specifies filtering criteria used to create the SDI batch, if any. See: Creating System Duplicate Identification Batches, page 2-8.

Select at least one duplicate set from the batch.

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

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

Updating Duplicate Sets

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

  Note: Automerge candidates would have been automatically merged as part of creating the SDI batch if the option was selected. See: Automerge in System Duplicate Identification, page 2-8.

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

To update duplicate sets with multiple parties, you can:

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

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

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

After you create the merge request, you can still update the end date for nonduplicate mappings. See: Administering Nonduplicate Mappings, page 2-10

Related Topics

Creating Merge Requests, page 2-13

System Duplicate Identification, page 2-6

Reviewing Merge Requests

The Request Review page provides a summary of the merge request, including the involved party or parties and any cumulative notes that were made during the request mapping process. The certification levels indicate the quality of records, and the meaning of each level is based on your organization's business needs. See: Assigning Certifications, page 4-1.

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

Related Topics

Merge Requests Overview, page 2-11

Mapping Merge Requests

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

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

As you go through the mapping process, you can:

- **Save your work at any time:** When you navigate out of a mapping step, your work for that step is automatically saved. For substeps with an Apply or Save Note button, you must click that button to save your work.

- **Cancel your work at any time:** When you click the Cancel button, you discard all mapping for the merge request, and mapping defaults are regenerated.

- **Record cumulative notes:** You record comments for any step of the mapping process. These notes are cumulative and displayed in each subsequent step.

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

Addresses and Relationships

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

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

Party Profile Attributes

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

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

Related Topics

Merge Requests Overview, page 2-11

Examples, page 2-3

Mapping Processes

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

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

> **Tip:** After you submit a merge request, you can access details of the Party Merge process in the Merge Request Queue page. See: Reviewing Merge Requests, page 2-16.

To map a merge request of type Single:

1. Review the request summary, page 2-18.

2. Map duplicate addresses within the party, page 2-19.

3. Map duplicate relationships within the party, page 2-20.

4. Review and submit the request for the Party Merge process.

To map a merge request of type Multiple:

1. Review the request summary, page 2-18.

2. Map party profile attributes, page 2-18.

3. Map duplicate addresses among the parties, page 2-19.

4. Map duplicate relationships among the parties, page 2-20.

5. Review and submit the request for the Party Merge process.

Request Summary

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

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

> **Caution:** A rejected merge request is no longer available for mapping and cannot be reactivated. To view rejected requests, search for requests with the Rejected phase. See: Merge Request Queue, page 2-11.

For Multiple type merge requests, you also see the included duplicates and the master party that is currently selected for the request. You can select a different master party or remove duplicates from the request. If the merge request contains both active and inactive parties, you can select only an active party as the master. For more information about master parties and removing duplicates, see: Creating Merge Requests, page 2-13.

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

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

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

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

Related Topics

Mapping Merge Requests, page 2-16

Profile Attributes

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

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

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

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

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

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

Related Topics

Mapping Merge Requests, page 2-16

Addresses

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

Every address has a grouping status:

- **Mandatory:** Addresses in a Mandatory duplicate set must merge together because they have the same location ID.

- **Optional:** Addresses in an Optional duplicate set can be removed from the group and included in another set.

- **Not Grouped:** Addresses are not currently mapped to any duplicate set. These addresses will exist after the merge as an address either of the one party for Single type merge requests or of the master party for Multiple type requests.

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

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

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

- Apply the mapping suggestions and override whatever groupings you currently have, if any.

- Clear all groupings, including suggested defaults, except for Mandatory duplicate sets.

The Addresses table shows duplicate address sets in a hierarchical manner. For each set, the master address is the parent and the other duplicates are its children. Any address that does not belong to a hierarchy is not included in any duplicate address set and is automatically transferred to the resulting party after the merge.

For tax purposes, you can merge only addresses with the same city, county, state, province, postal code, and country. The validation adapter and level are displayed if the address has been validated. See: Address Validation, *Oracle Trading Community Architecture User Guide*.

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

To map addressees, you can:

- **Update Set:**

  - Select another master address if the current master is not Mandatory.

  - Remove Optional or Not Grouped addresses from the set.

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

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

    For Mandatory duplicate sets:

    - You must select the master to merge the set with other addresses because the Mandatory addresses must merge together.

    - You can select only one Mandatory master to include in the new duplicate set.

    - You must keep the Mandatory master as the master in the new set.

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

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

Related Topics

Mapping Merge Requests, page 2-16

Relationships

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

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

If the HZ: Show Relationship Mapping Suggestions profile option is set to *Yes*, all suggested relationship mapping for the relationship role is shown by default in the Resolve Duplicates page. If not, the page displays all relationships in the role without any groupings except for the Mandatory duplicate sets. You can use the search to narrow down the list of relationships and subsequently find more relationships to map.

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

- Apply the mapping suggestions and override whatever groupings you currently have, if any.

- Clear all groupings, including suggested defaults, except for Mandatory duplicate sets.

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

Resolving Duplicate Relationships

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

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

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

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

Every relationship has a grouping status:

- **Mandatory:** Relationships in a Mandatory duplicate set must merge together because they involve the same parties.

- **Optional:** Relationships in an Optional duplicate set can be removed from the group and included in another set.

- **Not Grouped:** Relationships are not currently mapped to any duplicate set. These relationships will exist after the merge as a relationship either of the one party for Single type merge requests or of the master party for Multiple type requests.

To map relationships, you can:

- **Update Set:**

  - Select another master relationship if the current master is not Mandatory.

  - Remove Optional or Not Grouped relationships from the set.

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

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

  For Mandatory duplicate sets:

  - You must select the master to merge the set with other relationships because the Mandatory relationships must merge together.

  - You can select only one Mandatory master to include in the new duplicate set.

  - You must keep the Mandatory master as the master in the new set.

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

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

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

Related Topics

Mapping Merge Requests, page 2-16

Relationships Overview, *Oracle Trading Community Architecture User Guide*

3

Party Purge

This chapter describes how to permanently purge parties.

This chapter covers the following topics:

- Party Purge Overview
- Purge Requests

Party Purge Overview

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

The purge functionality includes:

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

Related Topics

Introduction to Oracle Customer Data Librarian, page 1-1

Purge Requests

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

1. You create the purge request, and the potential purge candidates are identified based on your criteria. See: Creating Purge Requests, page 3-2.

2. You can manage the purge request by viewing its details and determining the parties that you want to leave marked for purge or to optionally remove from the request. See: Viewing Purge Request Details, page 3-3.

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

3. Click Purge Parties submit the purge request for purge, and the parties that are marked for purge are purged from the Registry.

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

Information for a purge request includes:

- **Request ID for Identification:** The concurrent request ID for the TCA Identify Purge Candidates program, which identifies potential parties to include in the purge request. You can view the log of the concurrent request, which includes a list of the identified purge candidates.

- **Request ID for Purge:** The concurrent request ID for the TCA Purge Identified Parties program, which purges the parties in the purge request. You can view the log of the concurrent request, which includes a list of the purged parties.

- **Status:** The status of the identification or purge program, whichever is the last to run on the purge request. Possible statuses are: Identification in Progress, Identification Complete, Identification Error, Purge in Progress, Purge Complete, and Purge Error.

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

- **Purge candidates:** The number of parties initially identified for the purge request.

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

Related Topics

Party Purge Overview, page 3-1

Creating Purge Requests

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

- **Registry ID:** Select specific parties to purge. A party cannot be purged if it has associated transactions. After you create the purge request, you can view the request details to see which parties are ineligible for purge. See: Viewing Purge Request Details, page 3-3.

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

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

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

Related Topics

Purge Requests, page 3-1

Viewing Purge Request Details

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

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

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

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

Related Topics

Purge Requests, page 3-1

4

Party Maintenance

This chapter describes how to maintain parties.

This chapter covers the following topics:

- Maintaining Parties

Maintaining Parties

Party maintenance lets you:

- Assign a certification level and reason to the party. See: Assigning Certifications, page 4-1.

- Indicate if the party is internal to your organization.

- Activate or inactivate the party.

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

Assigning Certifications

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

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

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

The seeded certifications levels are:

- Highest

- Minimum

- Not Met

The seeded reasons are:

- Manual Review

- Third Party Content

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

Related Topics

Introduction to Oracle Customer Data Librarian, page 1-1

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Import

This chapter describes how to import data from legacy, third party, or other external data sources.

This chapter covers the following topics:

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

Import Overview

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

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

- **File Load:** Load files of organization, person, or contact data into the TCA import interface tables. See: File Loads Overview, *Oracle Customers Online User Guide*.

  The File Loads feature in Oracle Customer Data Librarian is the same as the one in Customers Online, except for additional functionality in CDL:

  - Searching for file loads by the creator. You also see who created each file load in the search results. See: Searching for File Loads, *Oracle Customers Online User Guide*.

  - Searching for mappings by the creator, either to use for a file load or to manage. See: Providing Mappings, *Oracle Customers Online User Guide*.

- **Batch Import:** Transfer batches of data from the interface tables into the TCA Registry. See: Import Batches Overview, page 5-2.

If the appropriate import profile options are set, the file load data can automatically transfer from the interface tables into the Registry, as soon as the file load completes successfully. See: Setting Up Import, *Oracle Customers Online Implementation Guide*.

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

Related Topics

Introduction to Oracle Customer Data Librarian, page 1-1

Import Batches Overview

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

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

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

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

- **Address validation:** Validate addresses within the batch against authorized sources.

- **Registry de-duplication:** Identify and resolve duplicates between the interface tables and the Registry.

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

All import batches are considered active, with any import or batch status, until they are purged. See: Purging Import Batches, page 5-11.

Searching for Import Batches

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

- **Address Validation Status:** The status of the address validation process.

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

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

- **Batch ID:** The import batch ID.

- **Batch Name:** The user-defined import batch name, which is the same as the name of the file load that provided the same set of data into the interface tables.

- **Batch Status:** The status of the import batch itself, including:

  - *Active:* The import batch is new and not yet defined for import.

- *Action Required:* Preimport processes have either the Declined or Completed status, and the import batch was defined with preview before the actual import. You can now update the batch and submit it for the import.

  Or, the import status is Completed with Errors or Completed with Error Limit Reached. You must resolve errors and import corrected records.

- *Rejected:* The import batch was rejected and cannot be defined for import.

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

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

- **Import Status:** The status of transferring the import batch from the interface tables into the TCA Registry, including:

  - Blank: Either the import batch is not yet defined, or it is was defined with preview before the actual import.

  - *Action Required:* Preimport processes have either the Declined or Completed status, and the import batch was defined with preview before the actual import. You can now update the batch and submit it for the import.

  - *Completed:* The data in the batch was successfully imported into the TCA Registry.

  - *Completed with Errors:* The import process has completed. There are errors, but successful records might already be imported.

  - *Completed with Error Limit Reached:* The import process has stopped after reaching a specified number of errors, as set by your administrator. Successful records might already be imported.

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

- **Purged By** (for purged batches search only)**:** The user who purged the import batch.

- **Source System:** The legacy, third party, or other external system that the source file data comes from.

The search results display import batches with data already loaded into the interface tables, not those still being loaded.

Managing Import Batches

After you view the import batches search results, you can:

- Reject import batches so that they are not eligible for import into the TCA Registry. The data remains in the interface tables until you purge the import batch. You can reject any batch except those that are currently being imported, already completed the import process, or are already rejected.

- Define imports to submit import batches for preimport and import processes, or only preimport processes. You can define import for any batch except those that are being or were already imported, or are rejected. See: Defining Imports, page 5-4.

- View or update import batch details, for any batch except those with preimport or import process currently running. If only preimport processes were run for

the batch, then you can preview results and resubmit for the actual import process. See: Viewing or Updating Import Batches, page 5-7.

- Resolve any import errors and resubmit the batch, page 5-11.

- Purge import batches, except those with preimport or import process currently running. See: Purging Import Batches, page 5-11.

- View purged batches in the batch import history, page 5-11.

Related Topics

Import Overview, page 5-1

Defining Imports

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

1. **Batch De-Duplication:** Optionally choose to run batch de-duplication and, if so, specify how to identify and resolve duplicates within the import batch. See: Batch De-Duplication, page 5-5.

2. **Address Validation:** Optionally choose to run address validation on the import batch, and if so, specify the authorized sources to use for validation. See: Address Validation, page 5-5.

3. **Import to Registry:** Optionally choose to preview results before import, or to run Registry de-duplication. You also specify error handling settings. See: Import to Registry, page 5-6.

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

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

Prerequisites

You should be familiar with:

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

- What types of validation the records from the interface tables must pass for successful import. See: Import Validations, *Oracle Trading Community Architecture User Guide*.

Related Topics

Import Batches Overview, page 5-2

Resolving Import Errors, page 5-11

Batch De-Duplication

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

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

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

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

- Specify how to resolve duplicate addresses, contact points, and contacts of party records that are not duplicates of other parties in the import batch.

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

Details on Actions to Take on Duplicates

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

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

If you choose to import directly, without a preview, then address validation checks only addresses that are imported, not those that are removed based on the selected action. See: Address Validation, page 5-5 and Import to Registry, page 5-6.

Related Topics

Defining Imports, page 5-4

Address Validation

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

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

The addresses available for validation depend on the selected action to take on duplicate parties within the batch. See: Details on Actions to Take on Duplicates, page 5-5.

Related Topics

Defining Imports, page 5-4

Import to Registry

Import Options

You can preview import statistics and preimport processes results before the actual import into the TCA Registry. After the preimport processes finish, you update the batch to preview results and submit the batch for import. See: Viewing or Updating Import Batches, page 5-7.

If you selected to run batch de-duplication and address validation, whether you select to update and preview the batch or not can affect which addresses get validated. See: Details on Actions to Take on Duplicates, page 5-5.

Registry De-Duplication

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

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

- Match threshold, but not the automatic merge threshold, are by default included in System Duplicate Identification (SDI) batches for merge consideration. See: System Duplicate Identification, page 2-6.

- Automatic merge threshold are automatically merged after the import. The master record is the TCA Registry record with the highest match percentage to the incoming record.

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

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

> **Tip:** If you select to update and preview the import batch before the actual import, you can change the default actions to take. For example, you can select to automatically merge potential duplicates that, by default, are designated for manual merge in SDI batches. See: Viewing or Updating Import Batches, page 5-7.

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

Error Handling

Optionally specify a limit on the number of errors allowed before canceling the import process. For example, if you enter 50, then the process stops as soon as error 51 occurs.

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

- HZ_CONTACT_POINTS
- HZ_LOCATIONS
- HZ_PARTIES
- HZ_RELATIONSHIPS

Related Topics

Defining Imports, page 5-4

Viewing or Updating Import Batches

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

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

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

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

  If you are viewing batches with the Completed with Errors import status, you can also view and resolve errors, if any. See: Resolving Import Errors, page 5-11.

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

The import batch details provide:

- General information about the batch itself.
- Import statistics, page 5-8.
- Preimport process statistics, page 5-8.

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

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

Related Topics

Import Batches Overview, page 5-2

Import Statistics

Before Import

The preimport statistics include the number of records for each supported entity. The total number of records for import is the total number in the batch minus the records that were removed and not to be imported, as a result of actions taken on duplicates from the batch de-duplication process. See: Batch De-Duplication, page 5-5.

After Import

The postimport statistics include the number of records that are:

- **Insert:** Imported as new records.

- **Update:** Imported to update existing records.

- **Merge Request:** Included in a System Duplicate Identification (SDI) batch for merge consideration.

- **Automatic Merge:** Automatically merged. The merge occurs after all potential duplicates are inserted, so the total number of records imported includes these records.

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

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

Related Topics

Viewing and Updating Import Batch Details, page 5-7

Import Details

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

Batch De-Duplication Details

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

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

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

records in a duplicate set have the *D* status except the one record to be imported, with the *I* status.

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

- Sent through Registry de-duplication, if that process is selected.

- Checked for other validations and marked for either insert or update.

See:

- Matching Records with Source System Management, *Oracle Trading Community Architecture User Guide*

- Import Validations, *Oracle Trading Community Architecture User Guide*

- Batch De-Duplication, page 5-5

Address Validation Details

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

- Passed or failed validation.

- Were sent to be validated by the specified adapter. Not all records in the batch are always validated. See: Details on Actions to Take on Duplicates, page 5-5.

See: Address Validation, page 5-5.

Registry De-Duplication

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

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

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

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

See: Registry De-Duplication, page 5-6.

Related Topics

Viewing Import Batch Details, page 5-7

Resolving Import Errors

1. View the errors of the import batch from the batch details. See: Viewing and Updating Import Batch Details, page 5-7. Only records with errors are displayed.

2. Correct the data directly in the interface tables. Records with errors are marked with E in the INTERFACE_STATUS column of the interface table and associated with detail records in the import errors table, HZ_IMP_ERRORS.

3. Change the INTERFACE_STATUS column value to C for each corrected record.

4. Return to the import batch details to import the corrected records. See: Viewing and Updating Import Batch Details, page 5-7.

Related Topics

Import Batches Overview, page 5-2

Purging Import Batches

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

You usually purge batches:

- After a satisfactory number of records are successfully imported into the TCA Registry from that batch.

- If the batch is rejected and you do not plan to import that set of data using another import batch.

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

Viewing Batch Import History

Purged batches are no longer active, and you can view them only on the Batch Import History page. To search for purged batches, see: Searching for Import Batches, page 5-2.

You can also view details of purged batches that were not rejected. See: Viewing and Updating Import Batch Details, page 5-7.

Related Topics

Import Batches Overview, page 5-2

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