An A to Z guide – New features of Customer Data Management in R12

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Learning Objectives

- As a result of this session you will be able to:

  - ➢ Understand new features of CDM in R12

  - ➢ Potential benefits of new CDM features
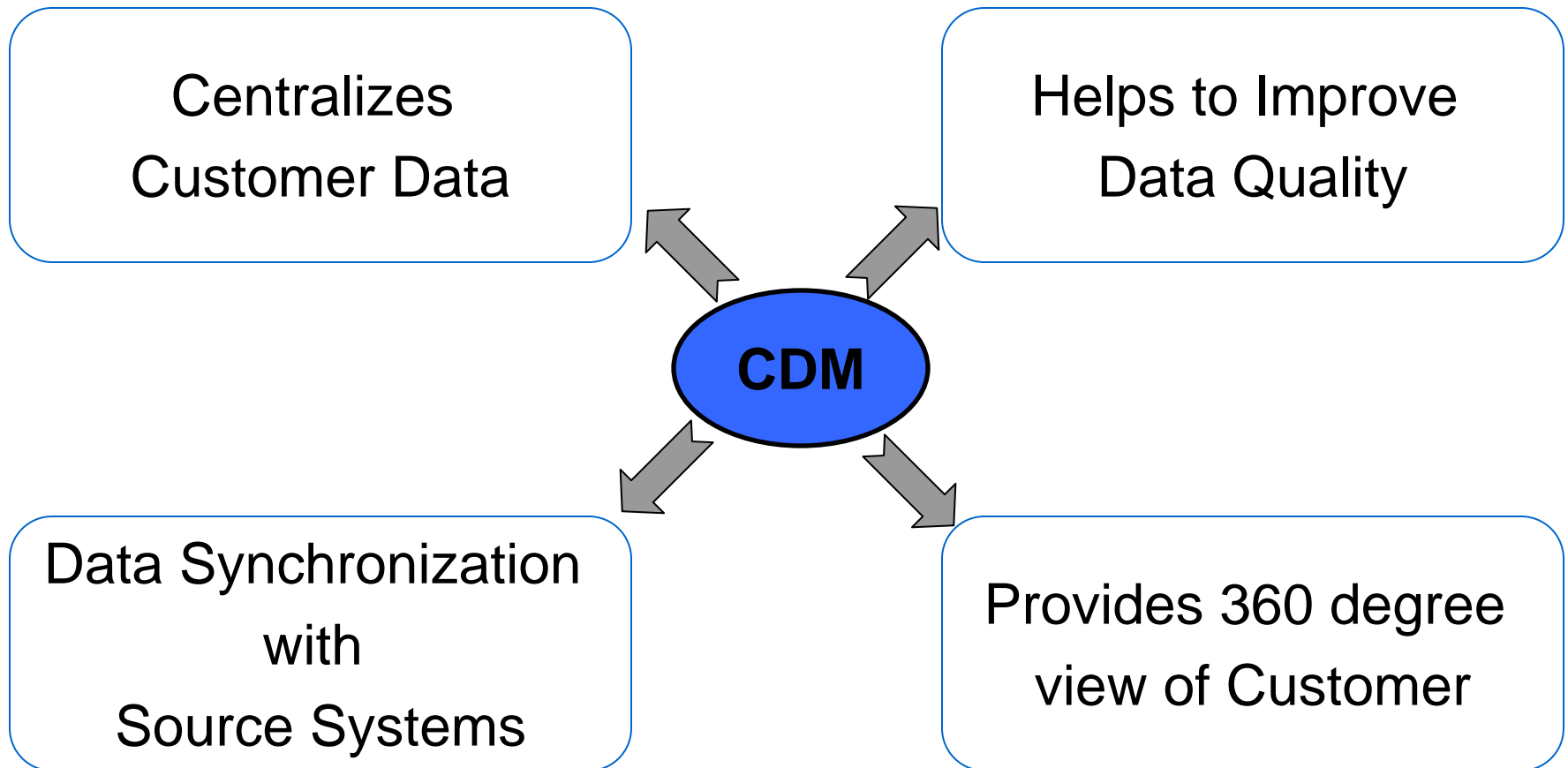
  - ➢ How to use new CDM features

Speaker's Qualifications

- Vikas is a Consultant in Enterprise Solutions unit of Infosys Technologies Limited
- Vikas has presented papers in OAUG conferences

- Infosys Technologies Limited (NASDAQ: INFY) is a global leader in Consulting and IT services (www.infosys.com)
- Enterprise Solutions (ES) group at Infosys provides Consulting and End-to-End implementation solutions for almost all the ERP packages (http://www.infosys.com/services/packaged-applications/default.asp)
- Oracle Applications practice in ES provides Oracle consulting services to world's leading corporations across industry verticals
- Infosys is a "Certified Advantage Partner (CAP - Worldwide)" of Oracle in i-Platform and E-business Suite track
- Infosys has the highest number of EBS certified professionals globally

Presentation Agenda

- **CDM – An Overview**
- R12 Enhancements
- MOAC
- Business Objects
- DQM Enhancements
- Bulk Party Import Enhancements
- Tech Stack
- Conclusion
- FAQ

CDM – An Overview

Centralizes
Customer Data

Helps to Improve
Data Quality

CDM

Data Synchronization
with
Source Systems

Provides 360 degree
view of Customer

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R12 Enhancements

- MOAC
- Business Objects
- Business Object Events
- DQM Enhancements
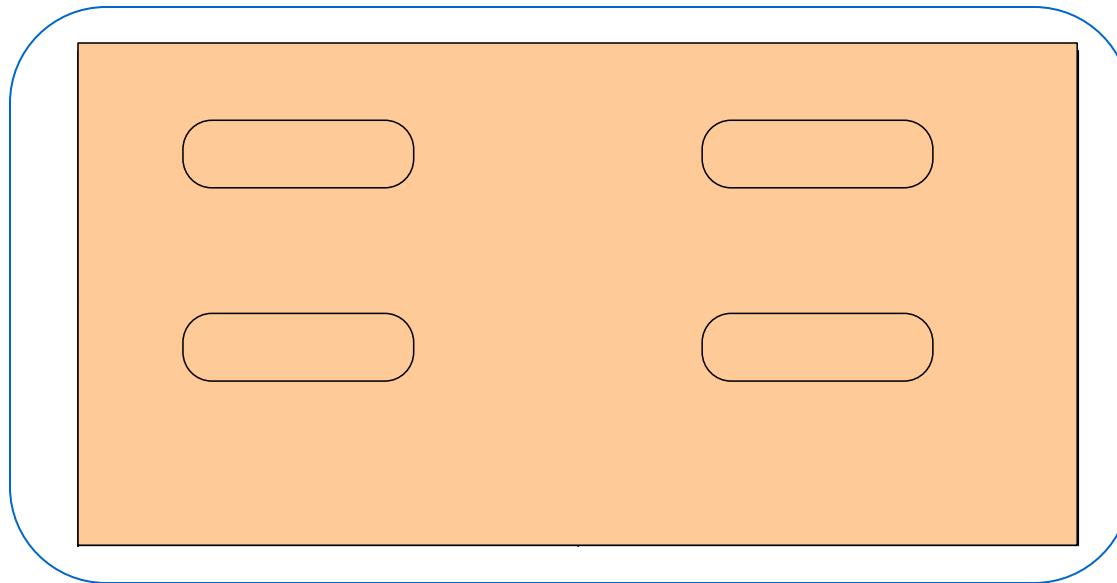- Bulk Import Enhancements
- Schema Changes

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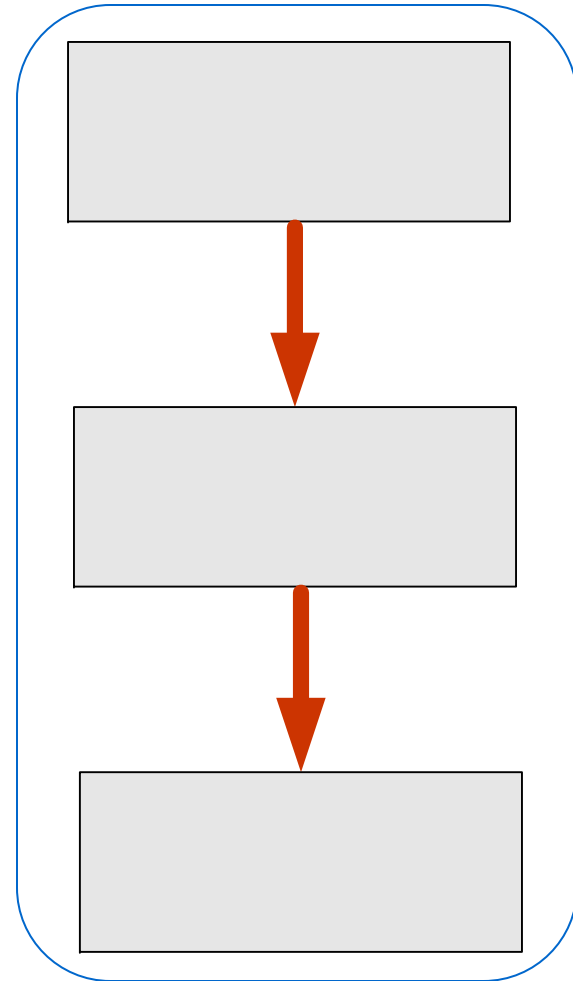- Tech Stack
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Multi Org Access Control

- New feature in R12 EBS
- Provides data access across OU's – Single responsibility

MOAC – Setups

- Define Security profile
- Set MO Profile options
- Set User level preferences

MOAC – Setups

MOAC – Components Impacted

- TCA Org striped views
- Public API's
- Customer Import
- Customer merge
- Customer Online Accounts
- Customer Online Transaction Viewer

Customization Methodology

- mo_global.set_policy_context can be used to set policy context for a given OU

mo_global.init(<application short name>)
mo_global.set_policy_context('S',<ORG_ID>)

- Execute the step before calling the HZ standard API

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Business Objects

- New Public API's for Business Objects
- Operations can be performed with a single API call
- Covers a total of 16 objects
- 4 Composite objects – Person, Organization, Person Customer and Organization Customer
- Covers granular objects like Customer Account, Address etc
- 4 operations – Create / Update / Save / Get
- Provides API's to Map Business objects in TCA to Source system identifier of other systems

Business Objects

HZ_PERSON_BO_PUB
(Public API for logical Person)

create_person_bo – Creates person related elements
update_person_bo – Updates person related elements
save_person_bo – Saves person related elements
get_person_bo – Retrieves person related elements

Business Object Events

- Business Objects Events to notify spoke systems for updates to TCA data
- Event specific object API

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DQM Enhancements

- Enhancements to DQM Setup screens

- New Screen for Admin landing page

- Enhancements to Word replacement lists, Attributes and Match rules

- DQM Public API to integrate to External systems for near to real time data duplication check

- Diagnostic reports for DQM setup data

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Bulk Import Enhancements

- New UI to Create Batches
- New UI to Activate Batches
- Enhanced UI to Monitor the progress of Bulk Import
- Fuzzy Key generation during Import – Using Data librarian or through Concurrent Program
- Post Processing – DQM Synchronization, Title De-normalization
- Improved Error management

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Schema Changes

SN	Object Name	11i	R12
1	HZ_CUST_SITE_USES	OU based View	Synonym
2	HZ_CUST_ACCT_SITES	OU based View	Synonym

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Conclusion

- Helps to Improve Agent efficiency with features like MOAC

- DQM Enhancements help to improve data quality and avoid creation of Duplicate data

- Standardizing the usage of TCA Entities using Business Objects

- Enhanced UI's for Bulk Import to reduce the backend intervention

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- **FAQ**

FAQ

1. **Is Customer Interface in compliant with MOAC?**

   Yes

2. **Can new custom business objects be created or is it restricted to pre-defined list of objects?**

   No. At present, only existing objects are supported.

3. **Are business objects specific to CDH or are they also available in EBS implementations?**

   Yes

References

- R12 Oracle Customer Data Management Technical TOI
- R12 Oracle Customer Data Management Functional TOI
- R12 Customer Data Management RCD
- R12 Oracle Customer Data Librarian Implementation Guide
- R12 Oracle Customer Data Librarian User Guide

Q & A

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Thank You!