

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

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## 1. Introduction

The enhancements done for Customer Data management in R12 are meant to improve the Customer care efficiency. The key enhancements include MOAC related changes, Data Quality Management enhancements, introduction of new Business objects for a combination of TCA business entities and Bulk import enhancements.

This paper details out the major CDM enhancements with detailed illustrations.

## 2. Customer Data Management – An Overview

Customer Data Management helps to consolidate the Customer data for an enterprise. It provides –

- Centralizes Customer data
- Helps to Improve Data Quality
- Provides 360 degree view of Customer
- Synchronizes Data with Heterogeneous Source Systems

## 3. Key R12 Enhancements

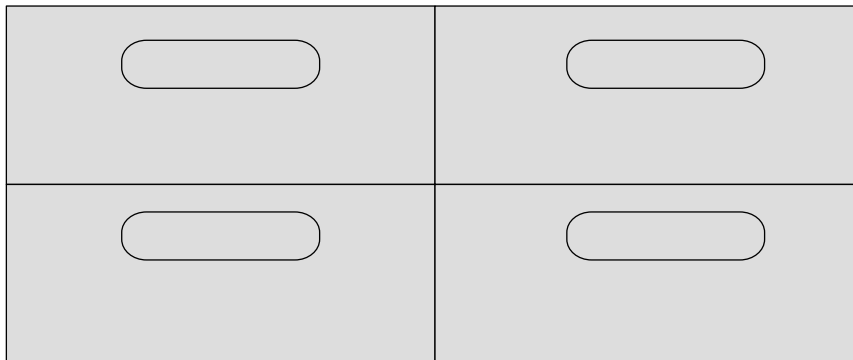
The following are some of the key features of CDM in R12.

- MOAC
- Business Objects
- DQM Enhancements
- Bulk Party Import Enhancements

## 4. MOAC – An Insight

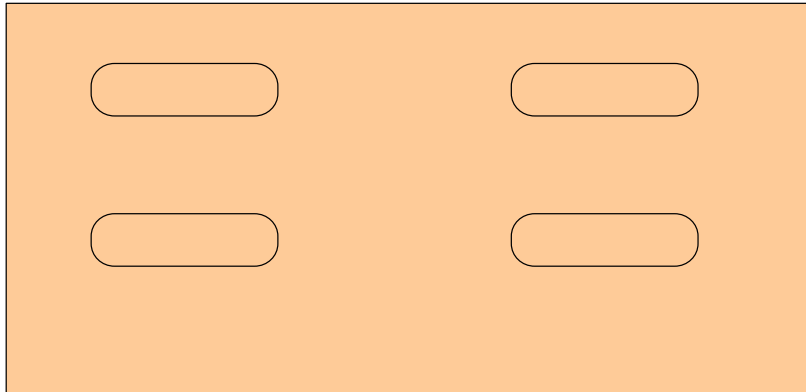
The key objective to MOAC is to provide a global consolidate view of sales data across operating units.

The below figure provides a business scenario where four different operating units under EMEA region are accessed through four different responsibilities. Each of the operating unit is for a given country, and the data for the same operating unit is accessed by four different responsibilities.



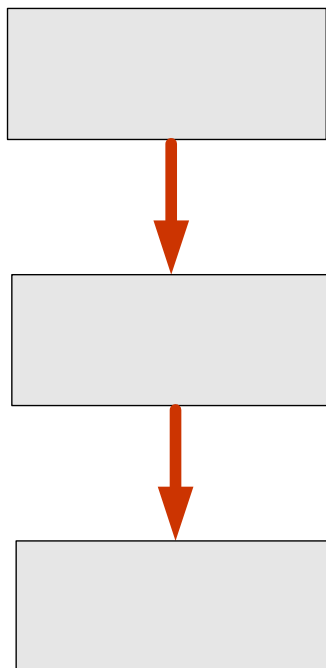
This was the approach used till 11.5.10.2 release.

In R12, MOAC eliminates the need of four different responsibilities for this shared services model. With the evolution to MOAC, a single EMEA responsibility can cater to four different operating units. The below figure erases the responsibility specific boundaries, that were drawn in the earlier figure.



### MOAC Setups

The following figure provides the setup flow for required for MOAC.

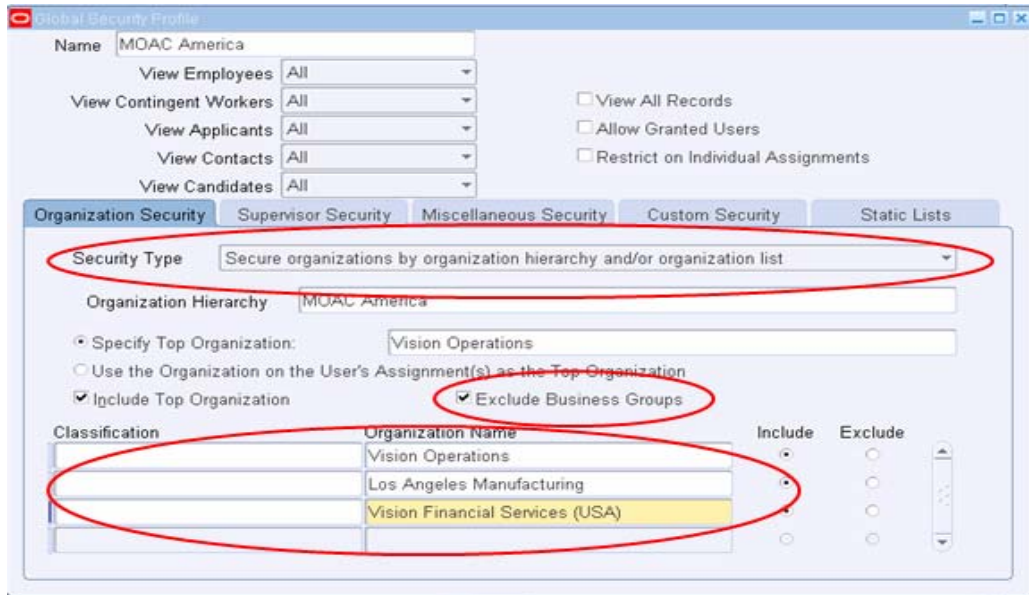


Spain OU

#### Step 1 – Define Global Security profile

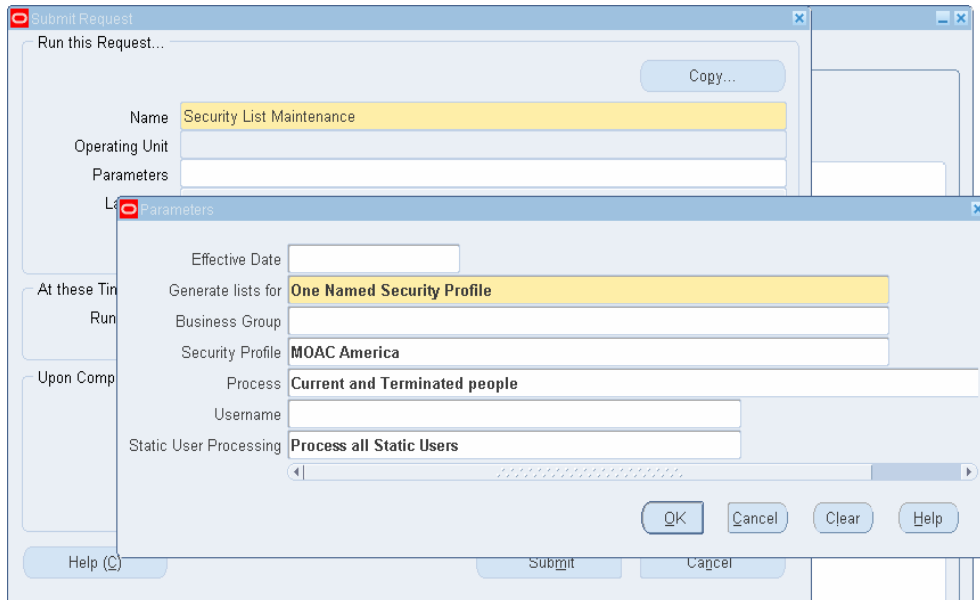
1. Navigate to *Human Resources, Vision Enterprises* responsibility → Security → Global Profile
2. Define a Global Security Profile
3. Choose *Secure Organizations by organization hierarchy and/or organization list. Operating Unit and Inventory Org.* for the security type
4. Choose Exclude Business Groups
5. Assign the required Operating Units

Holland OU



## Step 2 – Run Security List Maintenance program

1. Navigate to *Human Resources, Vision Enterprises* responsibility → Submit *Security List Maintenance* program



## Step 3 – Set MO Profile options

1. Set values to following profile options
  - MO: Security Profile
  - MO: Operating Unit
  - MO: Default Operating Unit

Profile Option Name	Site	Application	Responsibility	User
MO: Default Operating Unit			Order Management Super Us	
MO: Operating Unit	Vision Corporation		Vision Operations	
MO: Security Profile	Global Vision		Vision Operations	
MO: Set Client_Info for Debugging			MOAC America	
Modified Historic Cost Accounting : Debt				

## Step 4 – Set User Preferences

1. Set OU preferences for the User

ORACLE  
Diagnostics Preferences Close Window

Multi-Org Preferences

User Name: OPERATIONS  
Responsibility Name: Order Management Super User, Vision Operations (USA)  
Security Profile: Global Vision

Default Operating Unit

Responsibility Level Default Operating Unit: Vision Operations

Preferred Operating Units

Select Operating Unit	Preferred	Business Group	Ledger
<input type="checkbox"/> ITSA OU/INV		ITSA Bus Group/IE	FED Set of Books
<input type="checkbox"/> PRU-Vision Process Industries (US)		Vision Corporation	OPM US
<input type="checkbox"/> Progress Administration		Progress Master	Progress State & Local
<input type="checkbox"/> Progress BE		Progress BE	Progress BE
<input type="checkbox"/> Progress Canada		Vision Canada	Progress Canada

## MOAC in TCA

The following are some of the key changes done for MOAC in TCA.

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

## Concurrent Requests

A new parameter for OU has been added to SRS (standard request submission screen). It has also been added to some of the concurrent programs. This parameter is mostly made optional. If no value is passed to this parameter, then the program processes data for all the OU's under the profile.

## 5. Business Objects

Business Objects is a new functionality in R12 release. It provides –

- 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

With the introduction of Business Objects, the related entities in TCA can be created with a single API call.

The following figure provides a screenshot of one such API which can be used to create / update / save / retrieve details of a Person and its related entities.

### **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 Object events can be used to notify the Spoke systems for updates done to TCA data.

## 6. DQM Enhancements

The following are some of the key features to DQM functionality in R12.

- Enhancements to DQM Setup screens
- Enhancements to Word replacement lists, Attributes and Match rules
- A new DQM Public API is developed to integrate to the External systems for near to real time for the data duplication check
- Diagnostic reports for DQM setup data

## 7. Bulk Party Import Enhancements

The following are some of the key features to bulk Import functionality in R12.

- New UI to Create and 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 to maximize the percentage of success records

## 8. Schema changes

Till 11.5.10.2, the OU based Views used to control the data access for a given responsibility. These Views used to restrict the data access based on the OU set for *MO: Operating Unit* profile option for a give responsibility.

With the evolution of MOAC, these Views no more exist in the application. These Views have been migrated as Synonyms. For example: *HZ\_CUST\_ACCT\_SITES*, *HZ\_CUST\_SITE\_USES*.

## 9. Customization methodology

Till 11.5.10.2, Org Specific Views (*HZ\_CUST\_ACCT\_SITES*) were used to filter rows with a specific *ORG\_ID*. In R12, the views are no longer used. Instead, Synonym together with Security Policy is used to return rows for a single OU.

*mo\_global.init* needs to be used to populate MO global temp table.

Syntax: *mo\_global.init*(<application short name>)

*mo\_global.set\_policy\_context* needs to be used to set policy context for a given OU.

Syntax: *mo\_global.set\_policy\_context*('S',<ORG\_ID>)

S stands for Single and *ORG\_ID* is the desired operating unit. This step needs to be executed before calling the standard API's.

*mo\_global.set\_policy\_context* in R12 could be considered as a substitute to *dbms\_application\_info.set\_client\_info* in 11i.

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

## 10. Conclusion

R12 CDM provides MOAC which gives data access to multiple OU's from a single responsibility. This helps to improve agent efficiency and allows shared services operations. DQM Enhancements help to improve the Data quality and avoid creation of duplicate data.

Business Objects provide a standardized way to create TCA data using single API call.

## 11. References

1. R12 Oracle Customer Data Management Technical TOI
2. R12 Oracle Customer Data Management Functional TOI
3. R12 Customer Data Management RCD
4. R12 Oracle Customer Data Librarian Implementation Guide
5. R12 Oracle Customer Data Librarian User Guide