Using DataLoad to Streamline Data Entry, Maintenance, and Setup

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Agenda

- Introduction
- Situation
- Challenge
- Examples
- Observations
- Q & A
Presenter

- John Hebert
- 25+ years IT
- last 8 years using Oracle Financials
Situation

- Waukesha County - local government
- Oracle (Government) Financials 11.5.10.2.
- 6 core financial modules.
- Financials Application support – team of 1.
- Chronic Backlog of work requests.
- Tight budget constraints.
Challenge for presentation

- Open Records
- Test Database
- Privacy
- Security
- Vision Instance
- Data Obfuscation
- Insure Demo is with Dummy Data
Example – company changes Email addresses

• Email address changing was actually our first use of DataLoad.
• Security/Privacy concerns complicate the demo.
• Data Prep.
• Remove Person associated with User
• Rename Person and change email.
• Rename User and Re-associate Person with user
Macro example – Masking Person and User information.

-- DataLoad, Macro Demo --

Removing Person Information From Users
Playback example – Masking Person and User information.

-- DataLoad, Playback Demo --

Removing Person Information From Users
Etc.

- Depending on the demo requirements you other identifying information as needed.
- Once changed, you can then demo using masked information.
- You can do an OAUG presentation with privacy protected!
- Intermission? ? ?
AP User Complaint – Payment Invoice Entry

• Manual Entry of even a hundred payments takes hours - tedious.
• Keying errors tended to happen in 9 segment accounting structure.
• Managers spending time creating correcting journal entries.
• Isn’t there a better way?
Masking Suppliers

• Especially important where suppliers are individuals – don’t want to show social security numbers.
• Changed names and numbers
Masking Suppliers – Macro Example

-- DataLoad, Macro Demo --

Rename and Renumber Suppliers
Enter Payment Invoice – Macro Example

-- DataLoad, Macro Demo --

Enter Payment Invoice Information
Enter Payment Invoice – Playback example

-- DataLoad, Playback Demo --

Enter Payment Invoices
IT’s Funniest Home Videos?

-- DataLoad Demo, Macro Crash and Burn --

IT’s Funniest Home Videos
Macro Loads – a Swiss Army Knife?

• Macro loads are not limited to Oracle.
• Can transfer spreadsheet stored data into all sort of applications.
• We’ve used DataLoad Macros to populate commercial products like SharePoint.
• Can even use in your personal finances.
Summary - Macros

- Macro Loads provide a versatile way to enter or manipulate data in Oracle or other forms style products.
- Macros are sensitive to a form’s response time; be sure delays allow sufficient time for the form to respond. Running ahead of the form is one of the most common problems we’ve had with macro loads.
- Macros are oblivious to error messages.
Summary - Playback

- Playback integrates with and is limited to use with Oracle.
- Provides significant performance gains over a corresponding Macro.
- Produces a playback log to verify activity.
- Will stop in response to an error but have no error handling capacity.
Integrating with Oracle Applications

• Vendor documentation outlines configuration and setup instructions.
• White Paper associated with presentation explains how we front end file transfer and handling.
Q & A

• Questions? Answers?

• Thanks for coming – hope you found this useful.

• Afterthoughts or comments:
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