

# 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 presentatio

- Open Records
- Privacy
- Security
- Test Database
- 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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