Application Data Export User's Guide

Release 11

Part No. A58496–01

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Application Data Export User's Guide, Release 11

Part No. A58496–01

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Contents

Preface

Welcome to Release 11 of Application Data Export.

This User's Guide contains the information you need to set up Application Data Export and use it either as a standalone application or as an application launched from within Oracle HRMS.

This Preface explains how the User's Guide is organized, and introduces the other sources of information that can help you.

Audience For This Guide

This guide is a complete source of information about Application Data Export. It contains overviews, tasks and reference information for:

- end–users
- system administrators
- database administrators
- consultants

The guide assumes you have a basic understanding of HRMS concepts and some familiarity with Oracle Applications. If you have not yet been introduced to the system, we suggest you attend one or more of the Oracle HRMS training classes available through Oracle Education (see page v, below).

> **Note:** The information in this Guide is also available online in the Help system. Choose the Help icon on the toolbar from any window in the system to see Help topics relevant to that window.

How This Guide is Organized

The guide explains how you can set up and use Application Data Export for your organization.

- Chapter 1 provides an overview of Application Data Export.

- Chapter 2 explains how to use Application Data Export in standalone mode

- Chapter 3 explains how to use Application Data Export in application mode

- Chapter 4 explains how to use Application Data Export in letter request mode

The Appendices provide information for installing and setting up ADE and there is a section of reference information for the system administrator:

- Appendix A provides an overview of the installation and setup process

- Appendix B explains how to install and setup ADE on a System Administrator's PC

- Appendix C explains how to perform subsequent installations on user PCs

- Appendix D explains how to set up options, views and styles for an ADE installation

- Appendix E contains reference information for the system administrator

- Appendix F contains a list of error messages

Other Information Sources

Oracle provides documentation, training, and support services to help to make Application Data Export easy for you to understand and use.

Oracle Applications User's Guide

This guide tells you everything you need to know about entering data, querying, running reports, and other basic features of Application Data Export, and other Oracle Applications.

Oracle Payroll User's Guide

This guide is aimed at Payroll managers and explains how to set up and use Oracle Payroll to meet the requirements of your enterprise.

Oracle Human Resources User's Guide

This guide is aimed at HR managers and explains how to set up and use Oracle Human Resources to meet the requirements of your enterprise. It describes how you can represent your enterprise structures, policies, and people on the system and use this information to manage your human resources.

Oracle HRMS Implementation Guide

This guide includes modular implementation flowcharts and checklists to assist with your project planning. It contains a summary of the sequence of recommended steps for implementing Oracle Human Resources and Oracle Payroll. Full instructions for each implementation step are contained in the User's Guide.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle HRMS implementation team and those responsible for the ongoing maintenance of Oracle Applications product data. It also explains how to create custom reports on flexfields data.

Use this guide as a companion to your Implementation Guide and User's Guide.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle HRMS System Administrator.

Oracle HRMS Technical Reference Manual

This manual contains database diagrams and a description of Oracle HRMS database tables, forms, reports, and programs. This information helps you convert data from your existing applications, integrate Oracle HRMS with other non–Oracle applications, and write custom reports.

You can order a technical reference manual for any product you have licensed.

Oracle Applications Database Changes Manual

This manual lists the changes to the database structure of Oracle Applications between Release 10 and Release 11. It is intended to alert you to the changes that may affect customizations. It is not designed to provide full information about each product's database structure.

Oracle Applications Installation Manual

This manual provides information you need to successfully install Oracle HRMS in your specific hardware and operating system software environment.

Training

We offer a complete set of formal training courses to help you and your staff fully understand your Oracle HRMS applications and quickly reach full productivity. We organize these courses into functional learning paths, so you take only those courses appropriate to your job.

You have a choice of educational environments. You can attend courses at any one of our many Education Centers, or you can arrange for our trainers to teach at your facility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to include information on your own internal procedures as part of a training course on using the system.

Support

From on–site support to central support, our team of experienced
professionals continually provides you with whatever help and
information you need to keep your Oracle HRMS applications working
for you. This team includes your Technical Representative, Account
Manager, and Oracle's large staff of consultants and support specialists
with expertise in human resource and payroll management, ORACLE
database management, and your particular hardware and software
environment.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle provides powerful tools you can use to insert, update, and delete information in an Oracle7 database. However, if you use Oracle tools like SQL*Plus or Oracle Data Browser 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 forms, 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 forms to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. But, 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.

⚠ **Warning:** We STRONGLY RECOMMEND that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications tables, unless we tell you to do so in our installation, implementation, or open interface manuals.

About Oracle

Oracle develops and markets an integrated line of software products for information management, applications development, decision support, and office automation. Its family of applications products includes financial, manufacturing, and human resource management applications.

Oracle products are available for mainframes, minicomputers, and personal computers, and personal digital assistants. This allows organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified information resource.

Oracle offers its products, along with related consulting, education, and support services, in most countries around the world. Oracle is the world's largest supplier of database management software and services.

Thank You

Thank you for using Application Data Export and this User's Guide.

We value your comments and feedback. At the end of this guide is a Reader's Comment Form. We invite you to use this form to explain what you like or dislike about Application Data Export or this User's Guide. Mail your comments to the following address or call us directly at (650) 506–7000.

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1

Introduction to ADE

This chapter gives an overview of ADE business purpose and functionality. It introduces the three modes in which ADE can be used. These are standalone mode, applications mode and letter request mode each of which is also the subject of a separate chapter.

This chapter also outlines the ADE environment. It describes what platforms are supported, what products are compatible and what is included in an ADE style definition.

ADE Overview

Business Purpose of ADE

Application Data Export (ADE) links Oracle HRMS and Oracle Training Administration to desktop tools such as word processors, spreadsheets and data query tools. Data can be exported to desktop applications, then modified and uploaded to HRMS and OTA.

ADE can also be used to launch another application within Oracle HRMS or Oracle Training Administration. Applications invoked in ADE will then be run in a separate application window on the desktop.

ADE allows HR professionals to manipulate up−to−date HR information with familiar desktop tools.

ADE Functionality

You can therefore use ADE to :

- Query your applications database
- Export data from your application to ADE
- Preview exported data using the ADE built−in spreadsheet
- Manipulate and modify applications data
- Upload modified data from ADE to the application
- Generate standard letters
- Launch other applications, for example
  - a word processor or spreadsheet application
  - an Oracle reporting tool, such as Discoverer
  - a Hierarchy Diagrammer to graphically display an organization or position hierarchy
  - any other program defined on your system.

Three Modes of Working with ADE

You can invoke ADE in one of three modes depending on the tasks that you want to perform:

- **Standalone mode**. ADE is invoked from your PC desktop and run independently, without accessing either HRMS or OTA. Use standalone mode when you want to:

  - Have query–only access to the data

  - Select a predefined query and export to ADE all fields retrieved by the query

  - Attach search conditions to the predefined query

  - Manipulate the data at the same time as you are querying it.

  - Save a query definition so that you can run the query without having to redefine it.

- **Application mode**. ADE is invoked from a button on your application toolbar and run within HRMS or OTA. Use application mode when you want to:

  - Export data that makes use of folder definitions

  - Make use of the full range of HRMS and OTA functionality rather than predefined queries

  - Perform queries within HRMS and OTA and then export the current record to ADE, or rerun the previous query so that it can be exported

- **Letter request mode**. ADE is invoked from the Merge button in the Request Letter window in Oracle HRMS or Oracle Training Administration. Use this when you want to use HR data to produce standard letters for recruitment or enrollment. For example, a letter to trainees to announce the cancellation of a training course. Requests for letters can be automatically generated using associated assignment or enrollment statuses for each standard letter.

  Note: You can also perform a mail merge from standalone mode or application mode by exporting the data for your standard letter and then launching Microsoft Word.

The ADE Environment

Supported Platforms

ADE can only run on either Windows 95 or Windows NT 3.5 or 4.0.

Compatible Products

The following products are compatible with ADE:

- Spreadsheets – Microsoft Excel 95 and 97 or Lotus 1–2–3 Version 5.0

- Word Processors – Microsoft Word 95 and 97

Using Spreadsheets With ADE

You can use ADE to perform a query to define the information that you want to export from your Oracle HRMS or Oracle Training Administration database. ADE includes a built–in spreadsheet in the Data Preview window, where you can preview the data retrieved by the query. You can also export data to a spreadsheet application, so you can use the features of your spreadsheet to manipulate information for analysis and graphical representation.

In addition to enabling the export of data, some ADE styles also allow you to make changes to data in the spreadsheet, over a period of time, and then upload the modified data back to your database.

You can transfer data from your database to a spreadsheet using ADE in standalone mode or application mode:

- Using ADE in **standalone mode**, you access your database directly to export data, without running an application. You perform a query to retrieve information from your database. You can define search criteria to refine the selection of data and specify the order of data returned by the query.

  See: Exporting Data Using ADE in Standalone Mode: page 2–5

- Using ADE in **application mode**, you retrieve and export information from your database, within your application. You perform a query to retrieve a set of records or a single record from the current application window.

  See: Exporting Data Using ADE in Application Mode: page 3 –4

ADE Style Definitions

ADE uses **styles** to specify each query that you can perform. Styles are held in a file on your PC. Some styles are supplied with ADE and others are created by your System Administrator. Styles include some or all of the following definitions:

- the responsibility that can use the style. Each style can be defined for a specific responsibility so that you can only use it if you log on with that responsibility.

- the data retrieved by the query. Each query uses the view for the current application window or a view on the server.

- the format of the exported data. The data format specifies the style columns (corresponding to database fields) for the spreadsheet holding the exported data. The definition of each column includes the column width, the data type and if the data can be updated.

- whether the data can be uploaded back to the database. If data can be modified, the API used to upload the data must be included in the definition of the style.

  Your System Administrator must include a function on the menu for your responsibility, so you can use the style to upload data.

- if exported data is used to perform a mail merge, the name of the WP document used to merge the data.

- if the data is used to generate standard letters for recruitment or enrollment using the Request Letter window, the name of the letter. This specifies the letter, defined as the letter type, and the recruitment/enrollment statuses that are used to trigger requests for the letter.

See Also

Using ADE in Standalone Mode

This chapter explains how to launch ADE in standalone mode, and then how to export data and attach query conditions to data that you wish to export. You can launch other applications such as word processors, spreadsheets and data enquiry tools in order to manipulate the data that you have exported. You can modify information offline and then upload it to Oracle HRMS and Oracle Training Administration The chapter also explains how to work with saved queries and how to print a query.

Launching ADE in Standalone Mode

You do not have to be connected to Oracle HRMS or Oracle Training Administration in order to use ADE. When you use ADE without having first logged into HRMS or OTA, this is known as standalone mode.

To launch ADE in standalone mode you need to:

1.   Start ADE from the desktop

2.   Log on to ADE

3.   Select a responsibility

4.   Optionally, set the effective date.

These steps are explained below.

Starting ADE from the Desktop

To start ADE from your PC desktop:.

1.   If you are working in NT 3.5 click the ADE icon which can be found in the same group as the Oracle Applications icon.

2.   If you are working in NT 4.0 or Windows 95, navigate from the Start menu to the Oracle Applications group and then click the ADE icon.

Logging On to ADE

You log on to ADE in **standalone mode**, using the Oracle Applications Signon window that is displayed when you start ADE in standalone mode from your PC desktop. Access to your database is controlled by the same security as Oracle HRMS and Oracle Training Administration, which is set up by your System Administrator..

▶ **To log on to ADE:**

1. Enter your username.

2. Enter your password and choose OK to confirm.

The Oracle Applications Signon window also includes an Options button that allows you to modify the paths specified for the location of any applications that you use with ADE. You can modify paths without having to log on to ADE.

See: Defining Paths: page D – 2

Selecting a Responsibility

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│ ▐ HR Application Data Export                   _ □ ✕      │
│ ┌─────────────────────────────────────────────────────┐ │
│ │              Responsibility Selection               │ │
│ └─────────────────────────────────────────────────────┘ │
│ ┌──────────────────────────────────┐  ┌───────────────┐ │
│ │ Responsibilities                 │  │   ✓   OK      │ │
│ │ ┌──────────────────────────────┐ │  │               │ │
│ │ │ Test Responsibility          │ │  └───────────────┘ │
│ │ │                              │ │  ┌───────────────┐ │
│ │ │                              │ │  │   ✕  Cancel   │ │
│ │ │                              │ │  └───────────────┘ │
│ │ │                              │ │  ┌───────────────┐ │
│ │ │                              │ │  │   ?   Help    │ │
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```
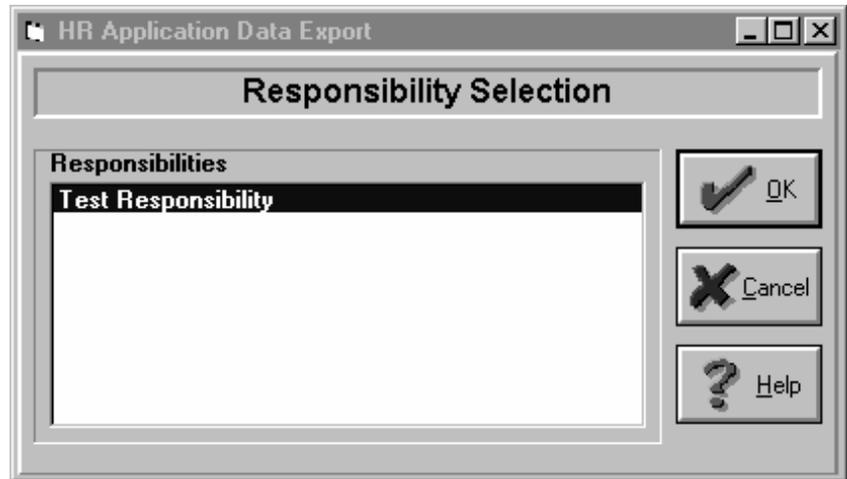
You use the Responsibilities window to select a responsibility when you use ADE in **standalone mode**..

The responsibility you select, restricts access to your database, which is controlled by the same security as Oracle HRMS and Oracle Training Administration; you can select any responsibility that you use to access these applications.

If you only have one responsibility, you are connected to your database with that responsibility, once you have logged on to ADE.

▶ **To select a responsibility:**

■ If you are presented with the Responsibilities window after you have signed on to ADE, select a responsibility from the list and choose OK to confirm.

Setting the Effective Date

The session date defaults to the current date, but you may change it if you need to. You are able to change the effective date at any point during an ADE session. Data with an earlier date than the effective date will not be visible to ADE. Additionally, if you attempt to query or load batches of data that contain some data created earlier than your current effective date, then it is likely that the entire query or load will fail.

See Also

Launching ADE in Application Mode: page 3 –2

Exporting Data Using ADE in Standalone Mode

Using Exported Query Data

Once you have exported data from your database you can process it in ADE as follows:

- You can generate standard letters and reports with the mail merge features of your word processor.. Exported data can be merged with a standard Word document to generate standard letters.

- You can export data to a spreadsheet application for analysis and graphical representation.

  For some queries performed using ADE, you can edit and manipulate the data over a period of time, and upload the modified data to your database to modify your applications data.

  Using Spreadsheets With ADE: page 1 –4

Predefined Styles in Standalone Mode

All the queries you can perform in standalone mode use predefined styles. Some styles are supplied on installation and others are created by your System Administrator.. You can use predefined styles to export data in one of the following ways:

- Export the data without specifying further conditions for the query

- Specify conditions for the query and then export the data.

Exporting Data without Specifying Conditions

You retrieve information using ADE in **standalone mode**, by performing queries on your database.

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┌──────────────────────────────────────────────────────────────┐
│ ▯ HR Application Data Export                          _ □ ×   │
├──────────────────────────────────────────────────────────────┤
│ ┌──────────────────────────────────────────────────────────┐ │
│ │                     Define Query                         │ │
│ ├──────────────────────────────────────────────────────────┤ │
│ │ User Details      Responsibility          Business Group │ │
│ │ smcmilla          Test Responsibility      AP Bus Grp    │ │
│ ├──────────────────────────────────────────────────────────┤ │
│ │ Query Details               Criteria        Session Date │ │
│ │ [_____▼]   [_____▼][]    2/17/98       │ │
│ ├──────────────────────────────────────────────────────────┤ │
│ │ Fetch Order                                              │ │
│ │ [↓][_____] [↓][_____] [↓][_____] │ │
│ ├──────────────────────────────────────────────────────────┤ │
│ │ Selection Details                                        │ │
│ │ [_____]                          [▲]  │ │
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│ │                                                          │ │
│ │                                                          │ │
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│ │                                                     [▼]  │ │
│ │ [◄][_____]     [►]  │ │
│ ├──────────────────────────────────────────────────────────┤ │
│ │ [🗁 Load]            [? Help] [▮ Exit] [▤ Fetch]         │ │
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```
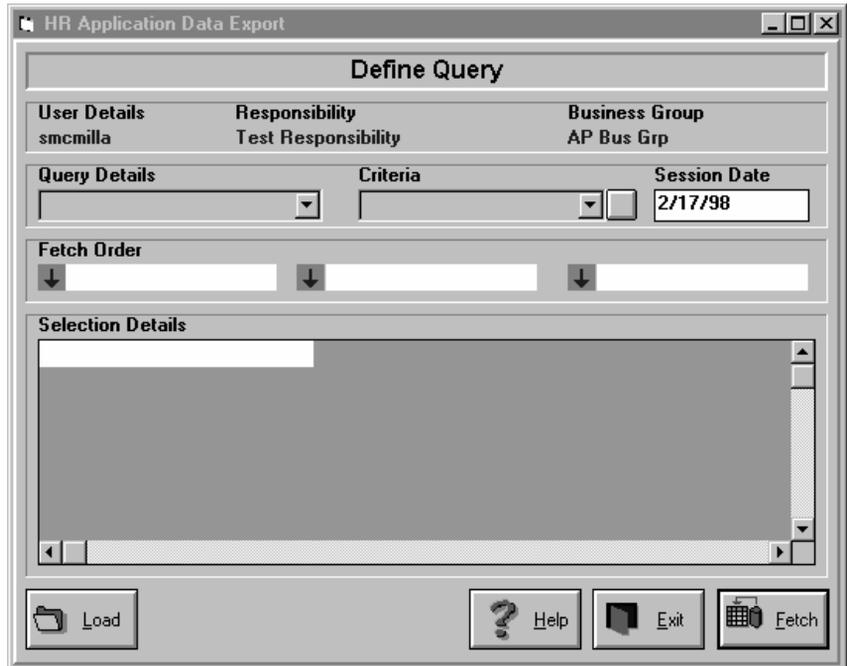
You can perform a query by simply selecting a query from the Define
Query window and invoking the query to perform a default transfer of
all fields defined for the query. The Define Query window also allows
you to select a predefined query and define conditions for the query to:

- Specify a number of search conditions to refine the selection of
  data retrieved by the query.

- Specify the order of data returned by the query.

Selecting a Query

You must select a query from those defined on your system. For
example, a query called 'US Employees' might return details of each
US employee entered on your database.

You can perform a default transfer for the query and view it in the Data
Preview window to see all the data retrieved by the query. You can
then define conditions for the query to refine the selection and format
of data retrieved by the query.

▶ **To select a query:**

1. Using ADE in standalone mode, navigate to the Define Query
   window and select a query from the Query Details pull–down list.

2. If you want to change the date for the query, modify the session date. The session date determines the date on which the exported date is effective.

To start exporting data immediately to transfer all records retrieved by the query, choose the Fetch button.

Specifying Search Conditions

The Define Query window also allows you to select a predefined query and define conditions for the query to:

- Specify a single search condition or multiple search conditions to refine the selection of data retrieved by the query.

- Specify the order of data returned by the query.

▶ **To specify search conditions :**

1. In the Define Query window, select a search condition from the Criteria list. For example, for a query called US Employees' you might select 'City' to query on a specific city name.

2. Using the mouse, drag the button next to the selected query condition, onto the white bar in the Selection Details panel.

3. Use the Query Value window to select a value for the query condition.
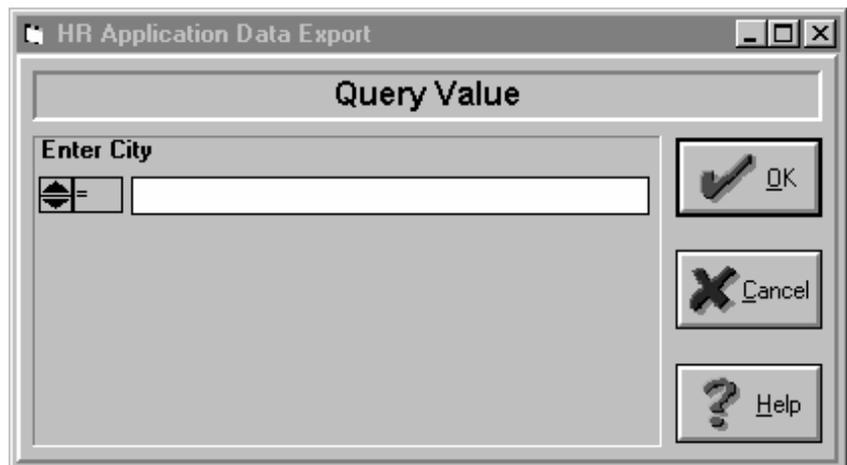
4. You can specify further conditions for a query to define multiple search conditions.

To specify further search conditions:

- Select another search condition from the Criteria list and drag it over the Selection Details panel using the mouse.

- Drop the search condition over one of the white bars that appear to build the expression for the query, using the individual search criteria.

Multiple search conditions combine single search conditions using the following operators.

AND   Both search conditions must be matched to return records for the query

OR   Either search conditions must be matched to return records for the query

5.   You can continue combining any number of search conditions to construct compound expressions for the query.

6.   To view the full details for a search condition, or delete or modify a condition, double–click it in the Selection Details panel. The query condition is displayed in the Edit Cell window.

Specifying the Data Order

You can specify the order in which data is returned for the query.

▶   **To specify the order of data returned by the query:**

1.   In the Define Query window, select a query condition from the Criteria list. Using the mouse, drag the query condition onto one of the three order fields in the Fetch Order panel.

The far left field takes precedence if you use multiple search criteria to specify the order.

2.   To change the order used to sort the data items, click on the arrow adjacent to the order field. By default, the sort order is ascending.

Exporting the Data

Fetch Data

| PERWSEPI | | ▼ |

Action
- ⦿ None
- ○ Word Processor
- ○ Spreadsheet
- ○ SQL*Plus
- ○ Discoverer
- ○ HR Organisation Diagrammer
- ○ HR Position Diagrammer

Buttons: Fetch, Start, Upload, Help, Exit

▶   **To export the data for a query:**

3.   In the Define Query window, choose the Fetch button to export the data. The data is transferred to the built–in ADE spreadsheet in the Data Preview window.

Specifying a Query Value

You use the Query Value window to specify the detail for a query condition. It is displayed automatically when you have selected a query condition in the Define Query window.

Using the Query Value window you can:

- Select a value from a predefined list.

- Enter a date value.

- Enter a text string.

- Enter a numeric value.

The format of the window depends on the query condition.

You can select a comparison operator to complete the definition for a condition, by clicking on the arrows in the spin box adjacent to the value field. The operators you can select for a text condition, depend on the type of query condition you are defining (text string, date, numeric value, predefined list).

The default operator for all query conditions selects items equal to the value.

▶ **To specify a query value:**

1. If you are selecting a value from a **predefined list**, choose the Find button to display the list. You can enter a text string with wildcards to refine the list of items displayed.

2. If you are specifying a **date value**, enter the date in the value field. To specify a date range using a start date or end date, select a comparison operator. For example, you could specify <= 21/01/1996 to query on Hire Date and retrieve details of employees hired after this date.

3. If you are specifying a **text string**:

    • Enter the string in the value field. You can include wildcards in the string.

    • Select a comparison operator to retrieve data for a range of values.

        Note: If you use wildcards to specify a text condition, a 'like' operation is performed.

4. If you are entering a **numeric value**:

    • Enter the number in the value field.

    • Select a comparison operator to retrieve data for a numeric range.

5. Choose OK to confirm the query value.

Comparison Operators

The table below lists the comparison operators you can use to specify a value or range of values for a query condition:

Operator	Meaning
=	equal to
<>	not equal to
>	greater than
<	less than
>=	greater than or equal to
<=	less than or equal to

Table 3 – 1 List of Comparison Operators

The default operator for all query conditions selects items equal to the value.

Working with Saved Queries

Saving a Query

Once you have performed a query on your database using ADE in **standalone mode**, you can save the query to rerun it later. A saved query includes all the search criteria specified for the original query, as well as the data formatting information and other configurable options for standalone queries.

> **Note:** The save query option is only available in standalone mode.

▶ **To save a query:**

1. Query your database using ADE in **standalone mode**.

   The data is transferred to the built–in ADE spreadsheet and is displayed in the Data Preview window.

2. In the Data Preview window, choose the Save button.

3. In the Save Query Definition window, enter a description for the query.
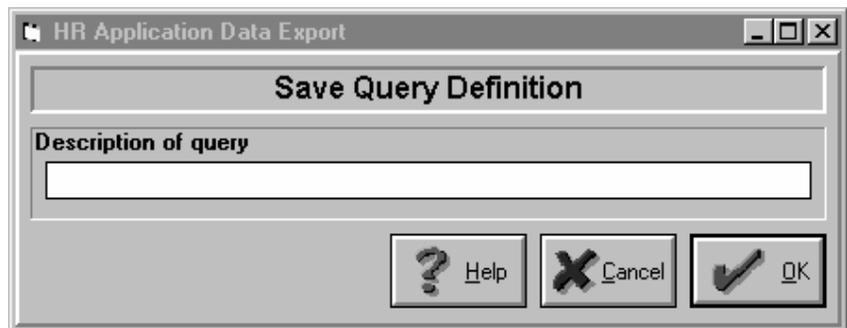
4. Choose OK to save the query definition.

Rerunning or Deleting a Saved Query

You use the Load or Delete Query window to load or delete a saved query. Once you have loaded a saved query, you can rerun it using the same query criteria and other details specified for the original query.

▶ **To load and rerun a saved query:**

1. Using ADE in **standalone mode**, navigate to the Load or Delete Query window.
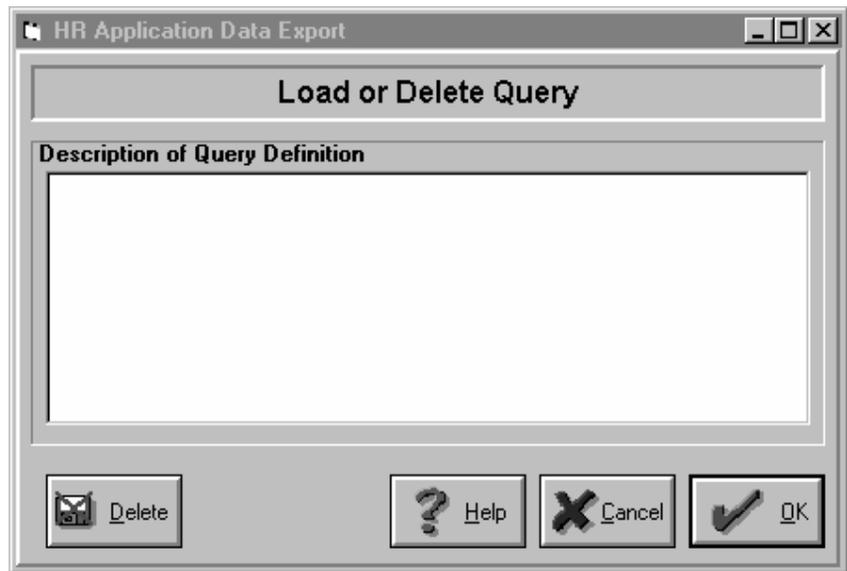
2. Select a query from the list of saved queries.

3. Choose OK to load the query. The query is displayed in the Define Query window.

4. Choose OK to rerun the query.

▶ **To delete a saved query:**

1. Using ADE in **standalone mode**, navigate to the Load or Delete Query window.

2. Select the query from the list of saved queries.

3. Choose the Delete button.

Previewing Exported Data

You use the Data Preview window to view data exported from your database using ADE. The Data Preview window displays data transferred to the built–in ADE spreadsheet.

The format of the Data Preview window and the tasks you can perform, depend on how you are using ADE (in **application mode** or **standalone mode**), and whether the style used to export the data has been enabled so you can upload modified query data to your database.

You can also use the Data Preview window to:

- Print the query data.

- Launch a word processor to perform a mail merge or a spreadsheet application to analyze the data.

- Save a query so you can rerun it. This option is only available using ADE in standalone mode.

- Import query data transferred to a spreadsheet and upload the modified data to your database.

Printing a Query

You can print query data transferred to the built–in ADE spreadsheet, that is displayed in the Data Preview window.

▶ **To print a query:**

1. Choose the Print button from the Data Preview window.

2. Using the Print dialog displayed, select the print options.

3. Choose OK to print the query data.

Modifying Applications Data in ADE

Some ADE queries will allow you to modify applications data in ADE and then upload the modified data to your applications database. The sequence is as follows:

1. Perform a query on your applications data

2. Save the spreadsheet

3. Edit the data in Excel

4. Upload the modified data

You can only upload data from a query that has been defined for this purpose. This is a System Administration responsibility. The definition of an upload query will specify which data items may be:

- Uploaded when modified

- Not uploaded even if modified

For example, the Phones query style will allow you to upload changes to Email address and phone number but it will not allow you to upload changes to First Name and Last Name.

In addition to the Phones query style, ADE is also supplied with the Salary Administration query style.. This allows you to download salary proposal details, change the details, and then upload the changed details.

See Also

Using the Salary Administration Window *Oracle Human Resources UK User's Guide.*

Uploading Applications Data

▶ **Performing the query**

- If you are working in ADE **standalone mode** perform a query, using the Define Query window, to transfer the required data to the Data Preview window.

- If you are working in ADE **application mode** perform a query, using any of the techniques for entering or querying data in Oracle HRMS or Oracle Training Administration to select the records you want to export from your database.

Before you invoke the query you must check the session date. The session date sets the effective date for datetracked information.

See Exporting Data Using ADE in Application Mode: page 3–4

▶ **Saving the spreadsheet**

When you have performed the query, save the data to your spreadsheet:

1. Press the ADE button on the applications toolbar to activate ADE

2. Select the Phones style from the ADE Fetch window

3. Choose the Spreadsheet option

4. Press Start

These steps will:

- Transfer the required records to your PC

- Create a spreadsheet HRIO.XLS to contain the data

- Launch Excel to display the data

▶ **Editing in Excel**

For the Phones query style the spreadsheet will display four columns:

- Last Name

- First Name

- Email

- Phone

Note that the columns for Last Name and First Name have a grey background. This means that these fields should not be changed. If you do change them the changes will be ignored when you perform an upload.

The columns for Email address and Phone details do not have a grey background. This means that the details in these fields can be changed in readiness for upload.

When you have completed all the changes, save the spreadsheet.

▶ **Uploading query data:**

The upload facility must be enabled by the System Administrator. You begin an upload in one of the following ways depending on whether you are working in standalone mode or application mode:

- In **standalone mode** choose the upload icon on the desktop. Then, log on by supplying your username and password and selecting a responsibility. This will display the Data Upload window.

- In **application mode** choose the Data Upload button. This will display the Data Upload window.

If neither the upload icon nor the data upload button are available then this means that Data Upload is not enabled.

Once the Data Upload is displayed, then the steps for completing the upload are:

1. Choose the Load button

2. Select the spreadsheet from the PC filing system. If you have not renamed the spreadsheet or overwritten it with a further copy, then it will be stored as HRIO..XLS, and you will find it in the default directory defined at installation (C:\TEMP).

3. Load the spreadsheet and, optionally, review the fields for which entries have been modified. Changes are marked as follows:

   - The Status column is marked *Updated*

   - The changed cells are highlighted in green

4. Select a date to determine the date from which the upload of data will be applied.

5. Select a datetrack mode from one of the following:

   - **DateTrack Correction**. This means that datetracked information is corrected for the last update from the effective date set by the session date. Use the correction mode if you do not need to keep a record of the previous information. After uploading the changes, the original values will be lost.

   - **DateTrack Update**. This means that datetracked information is updated so that a new record is created using the session date as the effective date. Use the update mode if you want to keep a record of the previous information.

   - **DateTrack Insert/Update.** This means that the person must have a future dated change to permit changes in this row to be inserted on a future date specified by the user.

6. Choose the Upload button. ADE uploads each row in turn. If no errors occur, successful completion will be reported and you will be informed of the number of rows updated.

7. If you want to modify the data offline, choose the Spreadsheet button to transfer the data to your spreadsheet application.

8. Choose the Upload button to upload the modified data back to your database. The status of each row is changed to 'Upload' as it is successfully uploaded.

9. If an error occurs during an upload, an error message is displayed.

Errors When Uploading Data

If an error occurs during upload, then the following error window will be displayed:

You can either:

- abandon the upload by choosing the Back button or

- continue the upload. If you continue the upload, you can ask to be prompted for further errors or request that all errors are ignored.

To view the errors for a row that has failed to be uploaded, double–click the row.

⚠ **Warning:** If you attempt to upload a record that you have changed and another user has changed the database record while you were making your changes, then this will cause the upload to fail.

Likely Causes of Errors

Errors will occur in each of the following circumstances:

- If you have selected the wrong choice of DateTrack mode

- If you are performing an update or insert/update and some people have future–dated changes and others do not.

▶ **To correct upload errors**

You can change the DateTrack mode and then upload selected records again. To do this:

1. Double–click on the row that you want to upload

2. Enable the upload checkbox

Using ADE in Application Mode

This chapter explains how to launch ADE in application mode, and how to query and then export data directly from Oracle HRMS or Oracle Training Administration. You can launch other applications such as word processors, spreadsheets and data enquiry tools in order to manipulate the data that you have exported. The chapter also explains how to print a query and how to modify information offline and then upload it to your current session on Oracle HRMS or Oracle Training Administration.

Launching ADE in Application Mode

You can use ADE in application mode from within Oracle HRMS or Oracle Training Administration.

Using ADE in application mode, you can:

- launch another application directly (without transferring data to the application) and run it alongside your application.

- transfer data from your database to the built–in ADE spreadsheet. ADE transfers all the records for the last query performed in your application or a single record from the current window. You can then launch a word processor or spreadsheet application to perform a mail merge or analyze the data.

▶ **To launch ADE in application mode:**

■ Click the spreadsheet icon on the toolbar in your application.

See Also

Using Extracted Query Data: page 2–6

Launching Another Application from ADE Application Mode

You can use ADE in **application mode** to *directly* launch an application, which you can run alongside Oracle HRMS or Oracle Training Administration. Launching an application directly does not transfer data to the application, but you can also use ADE to export data from your database, and then launch your spreadsheet program or word processor to process the data.

The applications you can launch directly from ADE are defined by your System Administrator for your responsibility during setup. If you cannot access an option, it may be because the paths have not been defined or the option is not available for your responsibility.   You can check the paths defined for programs on your PC using the Paths page in the ADE Options.

See: Defining Paths: page D – 2

If access to applications is restricted for your responsibility, your System Administrator must change the functions defined for your responsibility to change your access to them. For example, access to the Hierarchy Diagrammers is controlled by responsibility (see below).

The applications you can launch from ADE may include any or all of the following:

- a spreadsheet program.

- a word processor..

- Discoverer

- the HR Organization or Position Hierarchy Diagrammer. If you can launch the diagrammers, you may only be able to view hierarchies (without making changes to them), depending on the access for your responsibility.

- any other program you or your System Administrator has defined using the ADE Options. The program may be an Oracle application, for example, SQL*Plus, or a third party program.

▶ **To launch an application directly from ADE:**

1. Using ADE in **application mode**, choose an option from the ADE Fetch Data window, to select the program you want to run.

2. Choose the Start button to launch the program. ADE is iconized while the program is running.

> **Note:** When you run an Oracle program, you are connected using the same secure user Oracle ID you used to access Oracle HRMS or Oracle Training Administration.

Exporting Data Using ADE in Application Mode

You can use ADE in **application mode** in Oracle HRMS or Oracle Training Administration, to export data from your database using an application window.

ADE exports data from an application window by:

- re–executing the last query performed in your application to transfer all the records returned by the query, or

- transferring the current record displayed in your application.

Your System Administrator defines a style to specify whether the current record or set of records is transferred when ADE invokes the query.

Data is transferred to the built–in ADE spreadsheet, displayed in the Data Preview window, where you can launch your word processor or spreadsheet application to perform a mail merge or analyze the data.

▶ **To query and export data from an application window:**

1. Using ADE in application mode in Oracle HRMS or Oracle Training Administration, query an application window to retrieve a group of records or a single record.

   You can use any of the techniques for entering or querying data in Oracle HRMS or Oracle Training Administration to select the records you want to export from your database.

   See: Exporting and Querying Data

2. Click the Spreadsheet icon on the application toolbar to launch ADE.

3. In the ADE Fetch Data window, select a style from list box displayed next to the window name. The styles are predefined by your System Administrator.

4. Select one of the following actions:

   - **None** – to transfer data to the built–in ADE spreadsheet, displayed in the Data Preview window. You can then launch your spreadsheet application or word processor to process the data.

   - **Word Processor** – to launch your word processor to perform a mail merge.

   - **Spreadsheet** – to launch your spreadsheet application to analyze or report on the data.

5. If you are transferring data to the Data Preview window, choose the Fetch button to start the transfer. You can use the Back button in the Data Preview window to abandon the transfer.

6. If you want to launch your word processor or spreadsheet application directly from the ADE Fetch Data window, choose the Start button to transfer the data and launch the application.

   Note: When you launch your spreadsheet application or a word processor, either from the ADE Fetch Data window or the Data Preview window, the data is transferred to a temporary spreadsheet file (HRIO.XLS). Save the file with a new name to prevent it being overwritten the next time the application is launched.

   If you are performing a mail merge, then the data from HRIO.XLS will be merged with the standard Word document as defined by your System Administrator for the style selected for the query.

See Also

Using Spreadsheets With ADE: page 1 –4

Modifying Applications Data in ADE: page 2–16

4

Using ADE in Letter Request Mode

This chapter explains how to use letter request mode to generate standard letters for recruitment and enrollment. It also explains how you can use standalone mode and application mode to generate standard letters other than those for recruitment and enrollment. There is a description of how to setup standard letters for each type of mail merge available from ADE, and then the process for performing a mail merge is explained.

Standard Letters and Reports

You can use ADE to generate standard letters and reports. ADE retrieves data and exports it to a data file that is merged with a standard WP document. The WP document includes all the merge fields required to merge the data and the standard text for the letter..

Oracle HRMS and Oracle Training Administration currently provide other methods for generating standard letters and reports using a mail merge, which do not require you to have ADE installed on your PC.

To decide which method you want to use to generate standard letters:

> **See**
>
> Setting Up Standard Letters *Oracle Human Resources UK User's Guide*
>
> Using Letters to Manage Recruitment and Enrollment *Oracle Human Resources UK User's Guide*

Standard Letters for Recruitment and Enrollment

You can use ADE to generate standard letters for recruitment or enrollment from Oracle HRMS or Oracle Training Administration, by performing a mail merge from the Request Letter window in your application. You must define one or more letter types for each letter you want to generate. Each letter type associates one or more specified statuses in your application. The status is used to automatically trigger generation of the letters:

- in Oracle HRMS, the statuses are applicant **assignment statuses** that are associated with standard recruitment letters or reports. A request for a letter is automatically created when an applicant is given an associated assignment status.

- in Oracle Training Administration, the statuses are **enrollment statuses** that are associated with standard enrollment letters or reports. A request for the letter is automatically created when an enrollment is given an associated status.

You can also create new letter requests manually, by manually adding names to the list of people to receive the letter.

Other Standard Letters and Reports

You can also use ADE to create other standard letters and simple mail merge reports.

You can use ADE to export data for the merge:

- in **application mode** to export data from an application window within Oracle HRMS or Oracle Training Administration. ADE uses the last query performed in the window to retrieve data for the merge.

- in **standalone mode** to directly access your Oracle HRMS or Oracle Training Administration database. You select a style created by your System Administrator, to query your database to retrieve data for the merge.

Once the data has been retrieved from your database, you use ADE to launch Word to perform the mail merge.

Letter Request Setup for Recruitment and Enrollment

These steps describe how to set up Oracle HRMS or Oracle Training Administration to generate standard letters for recruitment or enrollment using ADE. The letters are generated by performing a mail merge from the Request Letter window.

These tasks may be performed by your System Administrator and certain tasks may require assistance from your Database Administrator.

Oracle HRMS and Oracle Training Administration currently provide other methods for generating standard letters and reports using a mail merge, which do not require you to have ADE installed on your PC.

To decide which method you want to use to generate standard letters:

> **See**

> Setting Up Standard Letters *Oracle Human Resources UK User's Guide*

> Using Letters to Manage Recruitment and Enrollment *Oracle Human Resources UK User's Guide*

▶ **To use ADE to generate standard letters for recruitment or enrollment:**

1. Define a letter type for each standard letter you want to generate. Each letter type associates a standard letter with one or more assignment or enrollment statuses.

   See: Defining Letter Types: page D – 20

2. Define views to retrieve data for each standard letter. A number of HRV views are supplied on the database. Others are not delivered

on the server but can be found in a script which is delivered as part of the client–side install. Your Database Administrator can customize this script to create additional views that are required.

See: Creating Views for Letter Requests: page D – 8

3. Create a LETTER style for each standard letter, to define the data columns used to hold the data for the mail merge, and the other parameters required to retrieve the data and perform the merge.

   Note: Remember to include the name of the Microsoft Word 7.0 document you plan to set up for the merge, for each style you create.

   See: Creating a Style: page D – 12

4. Create Word documents to merge the data to generate the letters.

   See: Creating a Mail Merge Document: page D – 22

See Also

Submitting Letter Requests: page D – 23

Standard Letter Setup

These steps describe how to set up Oracle HRMS or Oracle Training Administration to generate standard letters or simple reports using ADE, either in **standalone mode** or **application mode**.

These tasks may be performed by your System Administrator and certain tasks may require assistance from your Database Administrator.

You can also use ADE to generate requests for standard letters for recruitment or enrollment. The letter requests and reports are submitted using the Request Letter window.

Oracle HRMS and Oracle Training Administration currently provide other methods for generating standard letters and reports using a mail merge, which do not require you to have ADE installed on your PC.

To decide which method you want to use to generate standard letters:

See: Setting Up Standard Letters *Oracle Human Resources UK User's Guide*

▶ **To use ADE to generate standard letters:**

1. If ADE is used in standalone mode to export data for the merge, define a view to retrieve data for each standard letter. A number of

HRV Business Views are supplied on the database. Others are not delivered on the server but can be found in a script which is delivered as part of the ADE PC Installation. Your Database Administrator can customize this script to create additional views that are required.

See: Creating Views for Standalone Queries: page D – 5

If the data for the merge is exported from an application window, using ADE in application mode, you don't need to create a view. The query uses the view for the current window.

2. Create a style for the standard letter, to define the data columns used to hold the data for the mail merge, and the other parameters required to retrieve the data and perform the merge:

- If you are exporting data for the merge using ADE in **standalone mode**, you should create a GENERAL style.

- If you exporting data for the merge from an application window, using ADE in **application mode**, you should create a FORM style (where FORM is the name of the window).

   See: Style Types: page D – 16

   Note: Remember to include the name of the Word document you plan to set up for the merge, for each style you create.

   See: Creating a Style: page D – 12

3. Create a Word document to merge the exported data to generate the letters.

See: Creating a Mail Merge Document: page D – 22

Choosing a Mail Merge Document

When you submit a request using the Request Letter window, ADE retrieves the data required to perform the mail merge to generate the letter(s) for the letter type selected in the window. If more than one WP document has been defined for the letter type, you must select the document you want to use for the mail merge, using the Letter Choice window.

▶ **To choose a mail merge document:**

■ Select the document from the list of mail merge documents:

- Choose OK to transfer the data and perform the merge.

- Choose Cancel if you want to cancel the data transfer.

A

Introduction to ADE Installation and Setup

This appendix introduces the installation and setup process. It explains the difference between system administration setup and user setup. It then distiguishes between the different methods of installing ADE for indvidual PC users. Additionally, the appendix identifies the platforms and applications which are compatible with ADE.

Setup Overview

ADE is supplied with Oracle HRMS and Oracle Training Administration. Once ADE is installed, it must be set up for each PC you want to use to run ADE, and configured so that all users can use it to retrieve and export the information they require.

Typically, the responsibility for setting up ADE is the joint responsibility of your System Administrator and Database Administrator..

Types of ADE Installation

ADE can be installed for use

- On the System Administrator's PC

- As a non–networked installation for individual PC users

- As a networked installation for individual PC users

When you install ADE for an individual PC user, do each of the following:

- Repeat the steps by which ADE is installed on the System Administrator's PC

See Setup Checklist: page B – 3

- Add any further steps that are required to install for each category of individual PC user.

See:

Installing ADE on a Non–Networked PC: page C – 2

Installing ADE on a Shared Network Drive: page C – 2

Supported Platforms

ADE can only run on:

- Windows 95

- Windows NT 3.5 and 4.0.

Compatible Applications:

A spreadsheet application must be installed on each PC you want to use to run ADE, which is currently compatible with Microsoft Excel 95 and 97 and Lotus 1–2–3 Version 5.0.

If you want to use data exported using ADE to perform mail merges, you must also have a suitable word processor installed. ADE is currently compatible with Microsoft Word 95 and 97

You must define the queries that ADE uses to export data by creating suitable styles.

See: Using Styles and Queries: page 1 –5

You can define each style for a specific responsibility, so that only users who log on with that responsibility can use it.

Security and Control

ADE uses the same security model as Oracle HRMS and Oracle Training Administration. It uses **responsibilities** to restrict access to the data exported from the applications database, as well as providing other features to enable you to control access to the view of data retrieved by queries on the database.

ADE uses **styles** to specify each query you can perform using ADE. You can define each style for a specific responsibility, so that only users who log on with that responsibility can use it.

In the same way, you can define how data retrieved by a query is used, for example, whether it can be used in a mail merge to generate a set of standard letters.

For styles defined for use with ADE in standalone mode, you can specify whether exported data can be edited and uploaded back to the database to modify your applications data.

See Also

ADE Style Definitions : page 1 –5

Parameters Passed to ADE: page E – 5

Use of Functions and AOL Function Security: page E – 14

B

System Administration: Installation and Setup

This appendix explains each of the steps necessary to set up ADE on a System Administrator's PC. There is also a checklist which summarizes the sequence of installation and setup activities.

Setup Steps

The following topics provide an explanation of the steps for implementing ADE. Each topic includes a number of steps which are listed in the sequence you should follow.

The steps for setting up ADE are usually performed by your System Administrator. Some of the procedures for setting up ADE may require the technical expertise to write SQL*Plus scripts. Where assistance is required from a Database Administrator, it is indicated in the step.

You must perform some of the setup steps individually for each PC you want to use to run ADE, but you can copy some of the settings and styles to make them available to all PCs and ADE users. Typically, you might start by setting up ADE on a master PC, selecting the options you want to use as the defaults for each subsequent PC you configure for ADE, and creating styles for all responsibilities. You can save the settings and use them as the master settings that you modify for individual ADE users.

You should read through all the steps for setting up ADE and the associated topics for each step, before you begin.

You must complete the basic setup for ADE before you begin any other part of the setup.

Setup Checklist

The checklist below, provides a summary of the steps for setting up ADE, which are usually performed by your System Administrator. Some of the steps are optional and you should refer to the detailed setup steps for an explanation of each step. Use the checklist to record the steps you will use to set up ADE.

❑ **Basic Setup**

    ❑ 1   Run InstallShield

    ❑ 2   Define Paths

    ❑ 3   Set Miscellaneous Options

    ❑ 4   Define Menus

    ❑ 5   Enable Default Queries (optional)

❑ **Standalone Mode Setup**

    ❑ 6   Create Views

    ❑ 7   Prepare Scripts for APIs

    ❑ 8   Create Styles

❑ **Application Mode Setup**

    ❑ 9   Create Styles

❑ **Letter Generation Setup**

    ❑ 10   Define Letter Types

    ❑ 11   Create Views

    ❑ 12   Create Styles

    ❑ 13   Set Up Mail Merge Documents

Setup Steps: Basic Setup

The basic setup steps for ADE enable a user to:

- Use ADE in standalone mode from the PC desktop, using the queries and styles supplied with ADE.

   Note: You must have SQL*Net installed to run ADE in standalone mode.

- Use ADE in application mode within Oracle HRMS or Oracle Training Administration to:

  - query folder windows using the the current folder definition

  - query non folder windows using a default query.

  - Export extracted data to a spreadsheet application.

  - Launch other applications from within Oracle HRMS or Oracle Training Administration, such as, Word, Excel, Oracle Data Browser, etc.

- Use ADE in letter request mode within Oracle HRMS or Oracle Training Administration to:

  - Perform mail merges to generate standard letters and simple mail merge reports, including standard letters for recruitment or enrollment using ADE in letter request mode.

You must complete the basic setup for ADE before you begin any other part of the ADE setup.

Step 1: Run InstallShield

InstallShield provides a sequence of instructions that allow you to register ADE and create a directory structure with all necessary files present for ADE installation.

Before you attempt to run InstallShield, close all application programs on your desktop. Locate the directory that contains your delivered ADE files, and double–click on the Setup.exe file. This will start the InstallShield program which will provide a series of screens prompting you for information and then instruct you to move onto the next screen when you have completed each set of details.

The installation creates these directories:

- Backup – in which the previous version of ADE.INI will be stored if you decide to install a newer version of this file

- Letters – to contain letter templates

- Queries – to contain query templates

Unless you specify otherwise, these directories will be created beneath the default directoryC:\Program Files\ade created by InstallShield.

For example, the letters directory will be created in C:\Program Files\ade\Letters

Step 2: Define Paths

You must define paths to specify the location of the spreadsheet application, Microsoft Word and other programs used by ADE, as well as paths for the ADE executables, for *each* PC you want to use to run ADE.

On initial setup you must log on to ADE using the SYSADMIN username and password to define the paths and complete the setup for ADE

After initial setup all ADE users can define or modify the paths for ADE by choosing the Options button on the ADE Signon window. This option does not allow users to define other settings for ADE.

See Defining Paths: page D – 2

Step 3: Set Miscellaneous Options

The miscellaneous ADE options provide a number of settings for configuring ADE. These are usually defined during setup.

You should set these options for *each* PC you want to use to run ADE.

You set miscellaneous options for ADE using the Misc page in the Options window. You must log on using a System Administrator responsibility to access the Misc page; ADE prevents other users from accessing this page.

> **Note:** If you are installing ADE on a PC running Oracle HRMS Release 10.7, then the AOL Gateway/Foundation details are taken from the names defined for the applications in OACONFIG.ORA, and you do not need to define them separately.

However, you will need to define the AOL Gateway/Foundation details if:

– You do not have Oracle HRMS installed on your PC.

– You are using Release 11.0 of Oracle HRMS.
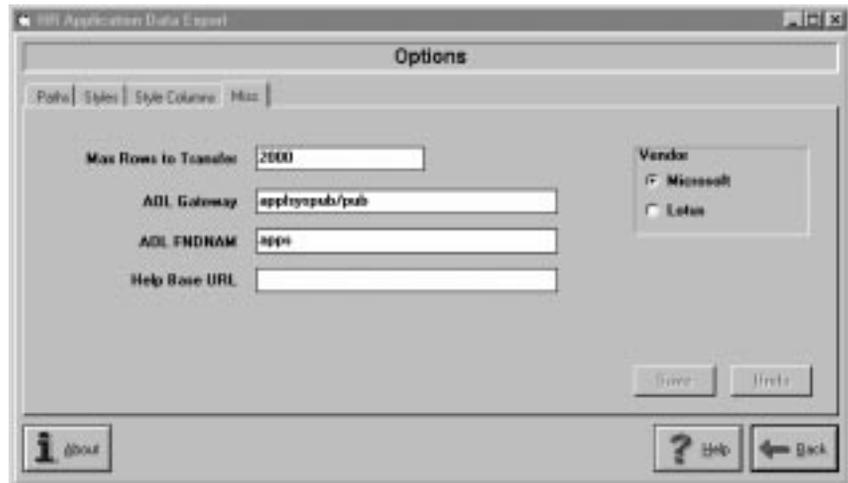
▶ **To Set Miscellaneous Options**

1. Using ADE in standalone mode, navigate to the Options window and choose the Misc page.

2. You can modify the option settings to specify:

- the maximum number of records that can be downloaded to a spreadsheet. The default is 2000 rows.

- the AOL Gateway name details.

- the AOL Foundation name details.

- the Help Base URL

3. Specify the vendor for the word processor and spreadsheet applications used with ADE (Microsoft, Lotus).

4. Use the Save and Undo buttons to save or undo your changes.

5. Choose the Back button to save your changes to the ADE settings file.

6. Use the Test button to run the program and check the ADE settings.

See Testing ADE Settings: page E – 4

All saved changes are used as the default settings for ADE.

Step 4: Define Menus

Access to ADE and the queries performed using ADE, are subject to the security profile used by Oracle HRMS and Training Administration, for the specified responsibility. You can define styles for queries so that only users with a specified responsibility can use them.

Access to certain other functions in ADE is also controlled by responsibility and you must include functions on the menu for the specified responsibility to allow users to access these functions.

See: Security and Control: page A – 3

The functions that are seeded for ADE are as follows:

- a function HRIO Enable Options to allow a user access to all the ADE options, without having to log in using the SYSADMIN responsibility. By default, users can only access the Paths page on the Options screen.

- functions for controlling access to the Organization Hierarchy Diagrammer and the Position Hierarchy Diagrammer. By default, users cannot launch the diagrammers from ADE. There are four functions for controlling access to the diagrammers:

    - HRIO View Organization allows a user to launch the Organization Hierarchy Diagrammer to display organization hierarchies; they are prevented from creating or modifying hierarchies.

    - HRIO Update Organization allows a user to launch the Organization Hierarchy Diagrammer and edit organization hierarchies.

    - HRIO View Position allows a user to launch the Position Hierarchy Diagrammer to display position hierarchies; they are prevented from creating or modifying hierarchies.

    - HRIO Update Position allows a user to launch the Position Hierarchy Diagrammer and edit position hierarchies.

- a function for enabling default queries (see **Enable Default Queries**, below.

- a function HRIO Enable Upload that enables a user to select the Upload button on the Fetch Data window (using ADE in application mode), to upload modified applications data exported from ADE in the same session.

- a function HRIO Enable Styles that enables a user to pull down data from the Data Preview window (running ADE in application mode) that can be used to create a new style. A button appears in the window for creating the style.

- a function HRIO Enable Views that enables a user to pull down data from the Data Preview window (running ADE in application mode) that can be used to create a new view. A button appears in the window that when pressed, requests ADE to create a SQL file which contains SQL for creating a view using the SQL issued by the form. This may be used with an existing style to create a view that can be used by ADE in standalone mode or by a data query tool.

Step 5: Enable Default Queries

ADE enables you to transfer data based on the last query performed on an application window in Oracle HRMS or Oracle Training Administration.

You can perform a query on:

- a non–folder window, using the **default query view** supplied with ADE or a style you have defined for that window, or

- a folder window, using the **current folder definition**.

To perform a default query on a non–folder window, you include the function HRIO Default Query on the menu for the specified user responsibility.

Setup Steps: Standalone Mode Setup

You can create styles and server views to define a set of standalone queries to retrieve data from the database.

You must complete the basic setup for ADE before you begin these steps.

Step 6: Create Views for Standalone Queries

Views installed on the server are used to retrieve data for standalone queries. A number of HRV views are supplied on the database. Others are not delivered on the server, but can be found in a script that is delivered as part of the ADE PC Installation. Your Database Administrator can customize this script to create additional views, which must then be installed on the server.

See: Creating Views for Standalone Queries: page D – 5

Step 7: Prepare Scripts for APIs

If the style created for a standalone query enables exported data to be modified and uploaded back to the database, your Database Administrator must write SQL*Plus scripts to allow APIs to be used.

You also need to define the specific fields that can be updated when you define the data columns for the style.

See: Using APIs: page D – 25

Step 8: Create Styles for Standalone Queries

A style for a standalone query must:

- be defined as a GENERAL style
- include the name of the view created on the server to retrieve the data.

The other parameters you must define, are standard for creating any type of style, such as the data columns used to hold data returned by the query. Other definitions are optional, depending on how the data returned is to be processed, etc.

See: Defining Styles: page D – 10

Setup Steps: Application Mode Setup

You can create styles to define a set of queries that can be performed using ADE in application mode, to retrieve and format data using application windows in Oracle HRMS and Oracle Training Administration.

You must complete the basic setup for ADE before you begin these steps.

Step 9: Create Styles for Application Mode Queries

Styles defined for queries using ADE in application mode must include the name of the window used to return data for the query.

The other parameters you must define, are standard for creating any type of style, such as the definition of the columns used to hold data returned by the query. Other definitions are optional, depending on how the returned data is to be processed, etc.

> **Note:** You don't need to define a view to retrieve data for the query; the last query performed on the window is used to retrieve the data.

See: Defining Styles: page D – 10

Setup Steps: Letter Generation Setup

ADE can be used to perform mail merges for generating letters and reports.

- in **letter request mode** from the Request Letter window in Oracle HRMS or Training Administration, to generate standard letters for recruitment or enrollment. The letter requests can be generated automatically using assignment and enrollment statuses in the application.

- in **standalone mode** by performing a query to export data directly from the application database.

- in **application mode** using a query from an application window to export data for the merge.

The steps below describe how to set up ADE to use it to generate standard letters. The specific steps and procedures you should follow, depend on how ADE will be used to generate the letters.

Standalone Mode

If ADE is to be used in standalone mode to generate letters, you must define views and create suitable styles to retrieve data for the merge. The styles must be defined as a GENERAL styles.

See: Style Types: page D – 10

For the exact sequence of steps you should follow:

See: Standard Letter Setup: page 4 –4

Application Mode

If you want to use ADE in application mode to generate letters, you must create suitable styles to export data for the merge. The styles must be defined as FORM styles, where you give the name of the application window that the style uses to retrieve data.

See: Style Types: page D – 10

You don't need to create views as the style uses the query for the application window to retrieve data.

For the exact sequence of steps you should follow:

See: Standard Letter Setup: page 4 –4

Letter Request Mode

The steps below outline the specific steps for setting up ADE to automatically create requests for letters and generate standard letters for recruitment and enrollment.

For further information see: Letter Request Setup: page 4 –3

Step 10: Define Letter Types

If requests for recruitment or enrollment letters are to be generated automatically, you must define a letter type for each standard letter you want to generate. Each letter type associates a standard letter with one or more assignment or enrollment statuses in Oracle HRMS or Training Administration.

See: Defining Letter Types: page D – 20

Step 11: Creating Views for Letter Requests

You must include views to retrieve data for each standard recruitment or enrollment letter. A number of HRV views are supplied on the database. Others are not delivered on the server, but can be found in a script that is delivered as part of the client–side install. Your Database Administrator can customize this script to create additional views, which must then be installed on the server.

See: Creating Views for Letter Requests: page D – 8

Step 12: Creating Styles for Letter Requests

A style used to generate letters from the Request Letter window:

- must be defined as a LETTER style.

  See: Style Types: page D – 10

- include the name of the view created to retrieve the data.

- include the name of the letter defined as the Letter Type.

- include the name of the document ADE will use to perform the mail merge.

The other parameters you must define, are standard for creating any type of style, such as the definition of the data columns that hold data returned by the query, etc.

See: Defining Styles: page D – 10

Step 13: Creating a Mail Merge Document (All Standard Letters)

You must set up a standard Word document for each standard letter or report you want to generate using ADE, containing the text for the letter and the fields used to merge the data.

See: Creating a Mail Merge Document: page D – 22

C

Installation and Setup on User PCs

This appendix explains each of the steps necessary to set up ADE on an individual user's PC. There are instructions for installing ADE on a networked PC, and a non–networked PC.

Overview of Installation on User PCs

When you are installing ADE on a user's PC you need to follow the checklist steps provided for installation on a System Administrator's PC.

See Setup Checklist: page B – 3

Additionally, you should complete the following steps depending on the type of installation that you are implementing.

Installing ADE on a Non–Networked PC

If there are no shared network drives, the procedure for installing ADE on user's PC is the same as that for installing and configuring the System Administrator PC.

Additionally, after installation, the following files should be copied from the System Administrator's PC to the user's PC:

- ADE.INI. You may also need to change ADE.INI using the ADE options window if the user has the spreadsheet or word processor in a different location than that specified on the Systems Administration PC
- Any Word documents required for mail merges

There may also be a need to create icons for invoking ADE in standalone mode when working with special databases such as a test database or a live database.

Installing ADE on a Shared Network Drive

With a shared network drive it is assumed that:

- Users will wish to share common files
- Each PC will have its own copy of Windows

1. Place ADE.INI on the network so that each PC can access it . Do this by setting an environment variable in the AUTOEXEC.BAT of each PC. For example, SET HRIO_ADEDIR=D:\ADE
2. Define each of the following in ADE.INI:
   - the network locations of the spreadsheet, word processor and other commonly shared tools

- a temporary directory for each PC. Usually, this is C:\TEMP

- the network location of the shared Word documents

3.   If each PC has a local ORAWIN tree rather than an ORAWIN tree on the network, then you must copy the following files from ORAWIN\BIN on the System Administrator's PC to ORAWIN\BIN on the user's PC:

- HRIO.EXE

- HRIOMAIN.EXE

4.   Consult the file ADE.MAP which is found in the *windll* section of the Release Kit. This file will give a list of files that must be copied to the WINDOWS\SYSTEM directory on each PC.

5.   If your installation program did not provide automatic registration of ADE, then you will need to run a separate registration procedure as follows:

   – Run the program REGEDIT which is found in the Windows directory

   – Choose *Merge Registration File* from the Registration Editor menu

   – Select the file ORAIPSRV.REG from the WINDOWS\SYSTEM directory

   – When you receive the message *Registration Successful* you can now use ADE on your PC.

6.   Set up any icons required for desktop use.

D

Options, Views and Styles for ADE Setup

This appendix explains how to define options, views and styles when you are setting up ADE. Use this material in conjunction with the checklist of setup steps when you are setting up ADE.

Defining ADE Options

You must define a number of options to setup and configure ADE. ADE is configured when it is set up by your System Administrator. You can modify the paths defined for ADE as your word processor or spreadsheet application may be in a different location to those defined by the options. To define options for ADE, you must have ADE installed so that it can be run in **standalone mode** from the PC desktop.

You use the ADE Options window to:

- specify the location of the programs (spreadsheet, wordprocessor, etc.) used by or launched from ADE, and the working directories for ADE.

- define the styles used to format the data retrieved by ADE from the Oracle HRMS or Oracle Training Administration database.

- set other miscellaneous settings required to configure ADE.

Defining Paths

You define paths to specify the location of the word processor and spreadsheet application used with ADE, the working directories for ADE and any programs or applications you want to be able to launch from ADE.

ADE is usually configured during setup, but once installed, you can modify the paths defined for ADE by starting it from your PC desktop and choosing the Options button from the ADE Signon window.

If you are a System Administrator setting up ADE, you can log on using the SYSADMIN username and password to access the ADE Options window. It also enables you to set other options for ADE so you can configure it for other users.

▶ **To define paths for ADE:**

1. Using ADE in **standalone mode**, navigate to the Paths page in the Options window.
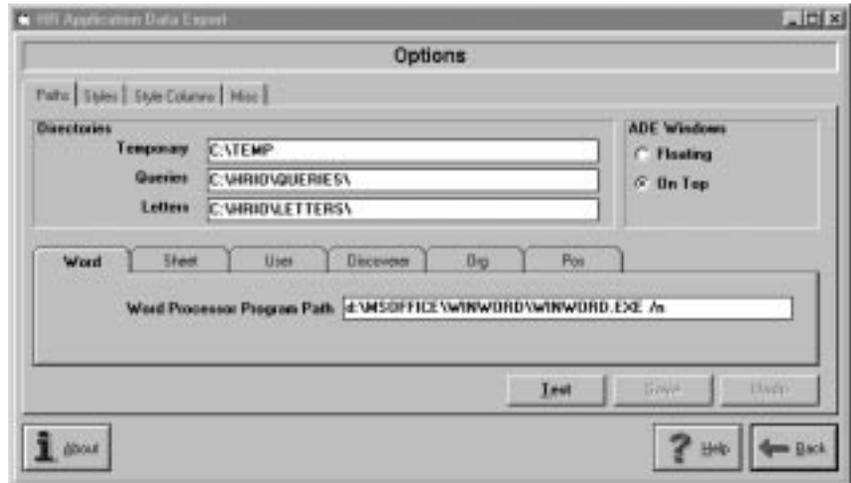
2. Define paths for the files created using ADE and any applications
    or programs used with or launched from ADE. Specify the drive in
    every field, but you do not need to enter a trailing \ character.
    Executable files are assumed to have the .EXE extension. You do
    not need to enter this explicitly.

    You can accept the defaults or define paths for the following ADE
    working directories:

    • a Temporary directory for storing temporary files such as
      spreadsheet files. The default is C:\TEMP.

    • a Query directory for storing saved query definitions. The
      default is C:\Progam Files\ADE\QUERIES.

    • a Letters directory for storing WP documents set up for mail
      merges. The default is C:\Progam Files\ADE\LETTERS.

      Note: The default location for queries and letters assumes that
      ADE has been installed using the C:\Progam Files\ADE
      destination. If ADE is installed in any other directory, then the
      letter and query directories will be subdirectories of that
      location.

    For example, if ADE was installed in D:\HRPROGRAMS\ADE
    then the letters directory will be found in
    D:\HRPROGRAMS\ADE\LETTERS

    You must define paths for the applications or programs you will
    use with or launch from ADE. You can define paths for any of the
    following applications or programs:

    • the directory for the Discoverer executable, and its working
      directory. Leave these fields blank if you are not using the
      Discoverer utility.

- the directory for your word processor executable.

- the directory for your spreadsheet program executable.

- the directory for a user defined program, for example, an SQL*Plupages script, and the working directory for the program. You can also enter a name for the program that is displayed as the name of the option selected to launch the progam. You can leave these fields blank if they are not required.

- the directory for the HR Organization Diagrammer

- the directory for the HR Position Diagrammer

Suggestion: To identify the paths for a program on the Windows desktop, switch to the Program Manager, select the icon and choose the Properties option from the File menu.

3. Use the Save and Undo buttons to save or undo your changes.

4. Choose the Back button to save your changes to the ADE settings file.

5. Use the Test button to run the program and check the ADE settings.

See Testing ADE Settings: page E – 4

All saved changes are used as the default settings for ADE.

Creating Views

Creating Views for Standalone Queries

Views installed on the server are used to retrieve data for standalone queries. A number of HRV views are supplied on the database. Others are not delivered on the server, but can be found in a script that is delivered as part of the ADE PC installation. Your Database Administrator can customize this script to create additional views, which must then be installed on the server. The script is called VIEWS.SQL and is delivered in the C:\Progam Files\ADE\SQL directory.

> **Note:** This is the default directory for ADE installation. If you have modified this directory to something other than C:\Progam Files\ADE then there will be a different pathname to the SQL directory.

ADE uses three types of views:

- Query views that are used to export data from the database to a spreadsheet application.

- Shadow views that are created to be used with a style invoked in application mode

- List of value (LOV) views that are used in standalone queries to display a list of values. LOV views enable selection of a value from the list, that is restricted to a limited set of values, to refine the criteria for a query.

The view(s) created for a standalone query are included in the style defined for the query.

Example: Query View

The view below returns a list of employees last names, their employee numbers and their gender:

```
create or replace view hrv_person as
select
  pp.business_group_id,
  pp.object_version_number,
  employee_number,
  last_name,
  sex,
```

```
      work_telephone
from
   per_assignments_v pa,
   per_people_secv pp
where
   pa.person_id = pp.person_id
/
```

The Business Group identifier is included in the view (with the name BUSINESS_GROUP_ID), to automatically include a WHERE clause to restrict the data returned by Business Group. The Business Group is determined by the user login.

Query views must comply with the following rules:

- The view name should begin HRV_. This prevents a user from modifying their ADE options to attempt to read data from other tables or views.

- The view should include the object version number, if it is used to return data that can be modified and uploaded back to the database using ADE.

The example view shown above, is based on secure view that gives the object version number from the base table, as well as using FND_SESSIONS for date effective queries.

Example: Shadow Views

The view below enables a user to obtain email and phone information for people for use when ADE is launched from the Person form

```
create or replace view HRV_PER_PEOPLE_V as
select
   PER.ROWID ROW_ID,
   PER.PERSON_ID,
   PER.LAST_NAME,
   PER.EMAIL_ADDRESS,
   PER.EMPLOYEE_NUMBER,
   PER.FIRST_NAME,
HR_GENERAL. GET_WORK_PHONE (PER_PERSON_ID)
WORK_TELEPHONE,
```

```
      PER.OBJECT_VERSION_NUMBER,

      PER.BUSINESS_GROUP_ID,

      PER.PERSON_TYPE_ID

    from

      PER_PEOPLE_SECV PER

    /
```

Example: List Of Values View

The view below enables a user performing the query to select gender
from a list of values. It creates a list of values by building a WHERE
clause:

```
    create or replace view hrv_lov_gender as

    select

      lookup_code internal_value,

      meaning display_value

    from

      fnd_common_lookups

    where

      lookup_type = 'SEX'

    /
```

List of value views must comply with the following rules:

- The view name must begin HRV_LOV_. (You don't need to
  enter the HRV_LOV prefix when you enter the name of the view
  in the style).

- The view must include a column defined as INTERNAL_VALUE
  that returns the internal value for an item.

- The view must include a column defined as DISPLAY_VALUE
  that returns the value seen by the user. In the example above,
  "Male" is the display value where the internal value is "M".

- If a list of values must be restricted by Business Group, it must
  include a column defined as BG_ID

For example:

```
    create or replace view hrv_lov_grade as

    select
```

```
      grade_id internal_value,

      name display_value,

      business_group_id bg_id

    from

      per_grades

    /
```

See Also

Defining Styles: page D – 10

Creating Views for Letter Requests

Views installed on the server are used to retrieve data for each
standard letter generated using the Request Letter window. A number
of HRV views are supplied on the database. Others are not delivered
on the server, but can be found in a script that is delivered as part of
the client–side install. Your Database Administrator can customize this
script to create additional views, which must then be installed on the
server. The script is called VIEWS.SQL and is available in the
C:\Progam Files\ADE\SQL directory. (Provided that C:\Progam
Files\ADE was accepted as the default directory for ADE installation).

The view for each standard letter type is included in the style defined
for the letter request. The letters are generated using the mail merge
features of Word. Requests for letters can be created automatically
using the applicant/enrollment statuses in Oracle HRMS or Oracle
Training Administration.

Views created for generating letters must comply with the following
rules:

- The view name must begin with HRV_.

- The view must include a column defined as
  LETTER_REQUEST_ID from the PER_REQUEST_LINES table.

- The view must join one or more columns in the
  PER_REQUEST_LINES table with other tables and views in the
  database. For example, you might use PERSON_ID.

- The view must retrieve data for each merge field defined for the
  standard letter.

Example: Letter Request View

The view below returns a person's first and last name following a letter request:

```
create or replace view hrv_people_letters as
select
  letter_request_id,
  last_name,
  first_name
from
  per_letter_request_lines plrl,
  per_people_f pp
where
  pp.person_id = plrl.person_id
/
```

See Also

Defining Styles: page D – 10

Letter Request Setup : page 4 –3

Defining Styles

A style defines the data retrieved for a query performed on the applications database using ADE, and the format of data exported by ADE. It also specifies the parameters required to process the extracted data.

Some styles are supplied with ADE and you can define any others styles you require. You use the Styles page in the Options window, using ADE in **standalone mode**, to define new styles. To access the Styles page, you must log on using the SYSADMIN username and responsibility or have this function included for your responsibility by your System Administrator; ADE prevents other users from accessing this page.
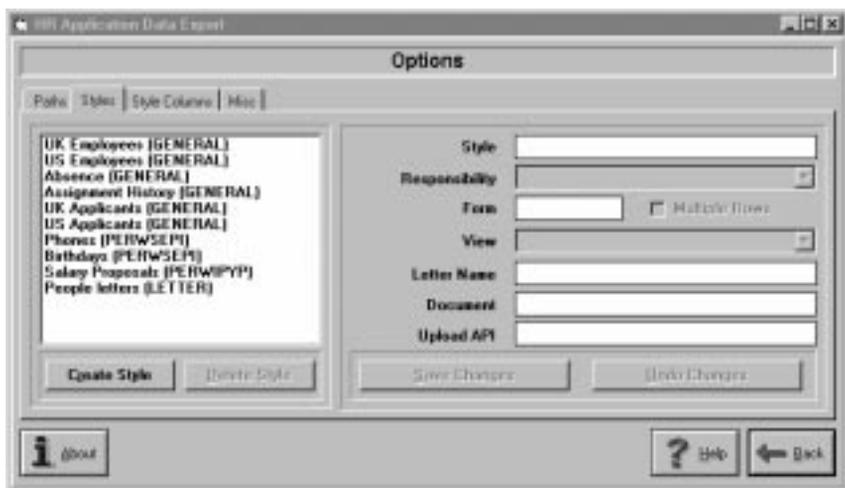
You use the Styles page to:

- create a new style
- delete a style
- modify a style.

Once you have created a style, you must specify each data column for the spreadsheet that holds the data returned by the query, defined by the style.

Style Types

Your System Administrator can define four types of styles that you can use to perform queries to export data using ADE:

- GENERAL styles – export data directly from the applications database using ADE in **standalone mode**. The data is retrieved by a view on the server, using an SQL*Plus script, included in the style.

- FORM styles – export a set of records or a single record from an application window (where the name of the window is specified), using ADE in **application mode**. The data is retrieved by the view used by the application window.

- LETTER styles – export data to perform a mail merge for generating standard letters for recruitment or enrollment, using ADE in **letter request mode**. The data is retrieved by view on the server, using an SQL*Plus script, included in the style.

- UPLOAD styles – allow updates to information that has already been downloaded from ADE. The initial information can be downloaded in either **standalone mode** or **application mode**.

  Note: You can only modify and upload information that was initially exported from ADE. You cannot insert new information.

Style Definitions

To create a style, you must specify:

- the style type.

  - If you are creating a LETTER or GENERAL style, enter GENERAL or LETTER as the style type.

  - If you are creating a FORM style, enter the name of the application window.

- the specific data fields (or columns) for the spreadsheet holding the data retrieved by the style, and the format for each data column.

Depending on the type of style you are creating, and how the retrieved data will be used, you can also define:

- the view(s) used to retrieve the data

- an API for uploading modified data

- a WP document for performing a mail merge

- a letter type to associate recruitment/enrollment statuses with a specific standard recruitment/enrollment letter.

• an API for uploading modified data back to your database.

Creating a Style

Your System Administrator creates styles for the queries you can perform. Writing SQL*Plus scripts for views, which are included in a style, and APIs for uploading data, may be a joint responsibility with your Database Administrator.

Prerequisites

❑ If you are creating a LETTER or GENERAL style, you must create a view to retrieve data for the query. This may be a task for your Database Administrator.

See:

Creating Views for Standalone Queries: page D – 5

Creating Views for Letter Requests: page D – 8

❑ If you are are creating a LETTER style to generate requests for standard recruitment or enrollment letters, you must define a letter type to associate a standard letter with specific assignment/enrollment statuses in Oracle HRMS or Training Administration.

See: Defining Letter Types: page D – 20

❑ If the style exports data for a mail merge, you must create a standard Word document to merge the data. Typically, ADE is used to perform a merge from the Request Letter window in Oracle HRMS or Training Administration. It can also be used to perform mail merges in application mode or standalone mode, using styles created for use by ADE in these modes.

See: Creating a Mail Merge Document: page D – 22

❑ If data exported using ADE in standalone mode can be edited and uploaded back to your database to modify applications data, you must :

• Define a shadow view of the view used by the applications form. This will be necessary for both standalone mode and applications mode. However, it is possible that a suitable HRV_ view may already exist to support uploads in standalone mode.

• Use an API.

See: Using APIs: page D – 25

▶ **To create a new style:**

1. Using ADE in standalone mode, navigate to the Options window and select the Styles page.
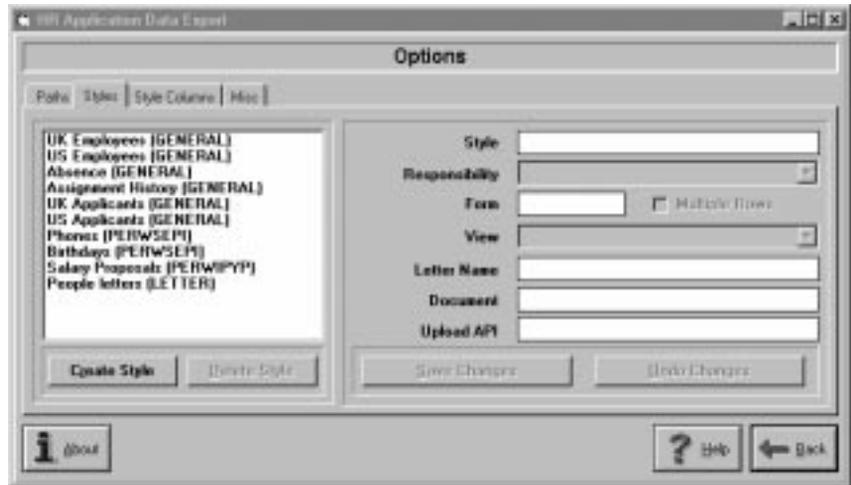
2. Select the Create Style button to display the Enter Style and Form window. Enter a name for the style and the type of style you want to create in the Form name field.

   See: Style Types: page D – 16

   Note: If you are creating a FORM style, you must enter the form name for the application window (as an 8 character code). You can display the window in the application and select the About Oracle Applications option from the Help menu to obtain the name of the form.

3. In the Responsibility field, select a responsibility for the style. Only ADE users who log on with that style can use it. If you don't select a responsibility, the style can be used by *all* ADE users.

4. In the View field do one of the following:

   • If you are defining a GENERAL or LETTER style, enter the name of a view created on your server that ADE uses to retrieve records from the database.

   • If you are defining a FORM style, you can leave this field blank. When ADE is launched in application mode from an application window, it uses the view defined for the form to retrieve data.

     Note: All views defined for use with ADE must begin with HRV_. A number of views are supplied with ADE.

5. If you are creating a style for a letter request, enter the name of the letter in the Letter field. This is the Letter Type you have defined in Oracle HRMS or Oracle Training Administration.

6. If the style retrieves data for a mail merge to generate letters, enter the name of the document that ADE uses for the merge.

   ADE assumes the document is located in the Letters directory defined using the ADE Options .

7. If the data exported for a query query can be edited and uploaded back to the database, enter the name of the API that will be used to upload the modified data in the Upload API field.

   Note: You must use a supplied API to upload data to your database.

   For the current list of supplied APIs in Release 11.0 see the *New Features* Help file

8. You can check the Multiple Rows box so that multiple records are returned by a FORM style.

   The style uses the last query invoked from an application window and retrieves all records returned by the query. If you don't check this option for a FORM style, data for just the current record is returned when ADE is invoked from the window defined for the style.

9. Choose the Save Changes button to save the style. You can use the Undo Changes button to cancel or undo changes.

10. You can choose the Back button to save your changes to the ADE settings file. If you don't want to define the data columns to complete the style definition you can save the settings and complete it later.

11. To define the data columns for the spreadsheet that holds the data returned by the query, choose the Style Columns page in the Options window.

▶ **Creating styles for upload**

To create a style for uploading purposes, the same facilities as described earlier are used, except further information is required by ADE, and it is necessary to define a view and identify an API to be used for the upload.

Before information can be uploaded, it must first be downloaded to a spreadsheet; ADE only supports updates to existing information, not inserts. The information can be obtained in either Applications Mode or Standalone mode.

In Applications mode, it is necessary to define a view which can be used to shadow the view used by the applications form. In Standalone mode, there may already be a suitable HRV view in the system, although it is likely you will need to define one.

The columns that the view must return are determined by the API to be used for the Upload. (Information about the HR APIs can be obtained from the Technical reference manual or New Features Help files). There must be:

- A column corresponding to each mandatory parameter to the API. The view column must have the same name as the API parameter, excluding the 'p_' in the API parameter name.

- A column OBJECT_VERSION_NUMBER which is taken from the column of the same name of the base table on which the view is based.

- Any number of columns corresponding to optional parameters of the API, again excluding the 'p_'. These additional columns may be provided for information purposes, or so the user can change the values

When defining the style in ADE for use with this view, the following column types can be defined:

0   The column is a 'Display Only' column, which means that it is provided to the user in the spreadsheet for information purposes only. It is displayed with a grey background in the spreadsheet. These columns can include mandatory parameters for the API (excluding the 'p_') where it is acceptable for the user to see the information

1   The column is an Updateable column, which means it corresponds to an API parameter, is displayed with a white background in the spreadsheet, and the user may change it.

2   API output parameters. These columns must correspond to API parameters of type OUT. They are not displayed in the spreadsheet, and they MUST be stated last in the list of all columns for the style. As they do not need to be seen by the user, their display width should be set to 0.

3   The column corresponds to a mandatory parameter in the API where the user should not see the information. As they do not need to be seen by the user, their display width should be set to 0. There will always be an OBJECT_VERSION_NUMBER column in this category.

4   This type is used for special DateTrack columns, and two such columns must be provided in the API supports datetrack

operations. They are EFFECTIVE_DATE and DATETRACK_UPDATE_MODE. Values are substituted automatically in these columns when uploading occurs.

The Phones style is provided as an example, and this style is used in the Person form, in conjunction with the HRV_PER_PEOPLE_V view delivered in VIEWS.SQL.

The ability to perform uploads is controlled by AOL function security.

See Use of Functions and AOL Function Security: page E – 14

Whenever ADE attempts to upload a record in to the database, and trace mode is on, a file called HRIO.API is created in the ADE temporary directory which shows the call to the API that was generated and run.

Defining a Style Type

You use the Enter Style and Form window when you are creating a new style. You must enter a name for the style and define the style type.

ADE uses four types of styles, see: Style Types: page D – 10

► **To define a style type:**

1. Enter a name for the style.

2. In the Form name field do one of the following:

   • If you are defining a style for a form, enter the name of the form.

      Note: You must enter the form name for the application window (as an 8 character code). You can display the window in the application and select the About Oracle Applications option from the Help menu to obtain the name of the form.

   • If you are defining a style for standalone use, enter GENERAL as the style type.

   • If you are defining a style for a letter, enter LETTER as the style type.

3. Choose OK to return to the Styles page in the Options window to complete the style definition.

Defining Style Columns

The columns defined for a style, specify each column in the spreadsheet that holds the data returned for the query that uses the style. Each column represents a field for the view that retrieves data for the query.

You can display all the columns for the data fields returned by the view and then modify them to define the columns for a style. You must also specify the format for each column to define the type of data it holds and the width, and whether the data can be updated.

You must log on using the SYSADMIN username and password to access the ADE Options window.

Prerequisite

❑ Create the style using the Styles page in the Options window.

▶ **To define columns for a style:**

1. Using ADE in **standalone mode**, navigate to the Options window and select the Style Columns page.
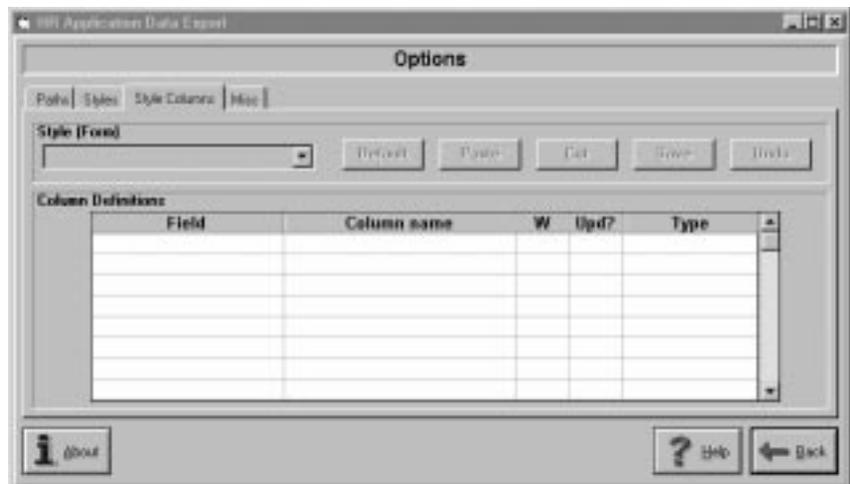
2. In the Style field, select the style.

3. You can choose the Default button to display all the columns returned by the view for the style. The format for each field is defaulted from the field type. You can edit or delete the columns to create new column definitions for the style.

4. To define a new column:

   • Enter the name of the field that is displayed as the title of the column in the spreadsheet.

      If the data is used to perform a mail merge, it is also used as the name of the merge field. The field name can include alphanumeric characters and spaces.

- Enter the name of the column.

  The column must either be:

  – one of the columns for the view created for the style (for a GENERAL or LETTER style).

  – one of the columns for the view used by a the application window (for a FORM style).

  Suggestion: If you don't know the the column names for a specific application window, you can launch ADE in application mode and perform a default query to obtain the column names.

- Enter the width of the column (expressed as a decimal number in inches) for the spreadsheet that is used to hold the data returned by the query.

- If the column is for a GENERAL style, you can enter a number to specify if a field can be updated:

  0   the field is not displayed

  1   the field is displayed but cannot be updated

  2   the field is displayed and can be updated

  Note: You can only modify applications data and upload it back to the database using ADE in standalone mode.

- Enter the field type for the column:

  You can define a field type as:

  – V Varchar

  – N Numeric

  – D Date

  – the name of the view that returns a list of values. For example, you could create a view, HRV_LOV_GENDER, to enable selection from a defined list of values for gender (Male, Female, Unknown).

  Note: You must define a style column for each column that is returned to a spreadsheet when the style is used.

5. To modify a column, edit the entries for the column. You can double click in a cell to display the full cell contents in the Edit Cell window.

6. To insert a new style column, highlight the row that defines the style column and choose the Paste button.

7. To delete a style column, highlight the row that defines the style column and choose the Cut button.

8. Choose the Save button to save the style. You can use the Undo button to cancel the changes.

9. Choose the Back button to save the style definition.

See Also

Defining Styles: page D – 10

Modifying a Style

You can change an existing style or create a new style from an existing style, by modifying.   You can also edit the data columns defined for a style.

▶ **To modify a style:**

1. Using ADE in **standalone mode**, navigate to the Options window and select the Styles page.
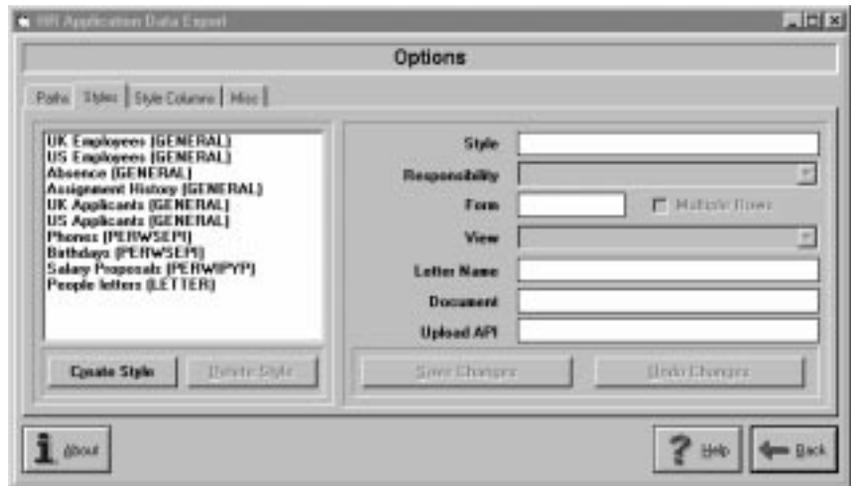
2. Select the style from the list of styles.

3. You can change any of the definitions for the style. For example, you can change the view, document or letter name used by the style, and the responsibility assigned to a style.

4. Choose the Save button to save the new definition.

▶ **To modify a style column:**

1. Using ADE in **standalone mode**, navigate to the Options window and select the Style Columns page.
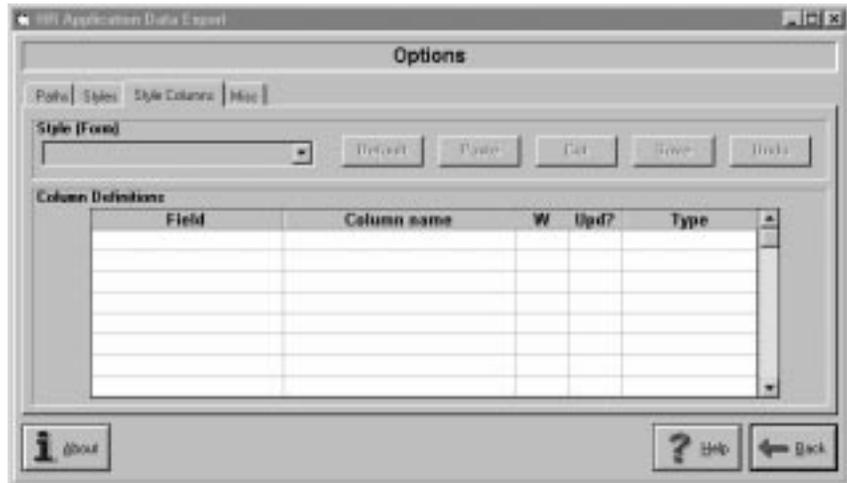
2. In the Style field, retrieve the style.

3. To modify a column, edit the entries for the column.

4. You can double click in a cell to display the full cell contents in the Edit Cell window.

5. Choose the Save button to save the new definition.

Deleting a Style

Your System Administrator can delete an existing style using the Styles page in the Options window.

You must log on using the SYSADMIN username and password to access the Styles page.

▶ **To delete a style:**

■ Using ADE in standalone mode, navigate to the Styles page in the Options window, select the style from the list of styles and choose the Delete Style button.

You are prompted to use the Save button to confirm the action, or the Undo button to cancel.

Defining Letter Types

To use ADE to generate requests for recruitment or enrollment letters in Oracle HRMS and Oracle Training Administration, you must define

a letter type for each standard letter you want to generate. Each letter type associates a standard letter with one or more specified statuses. The letters are generated by performing a mail merge from the Request Letter window.

You define standard letter types in the Letter Type window in Oracle HRMS or Oracle Training Administration. This may be a task for your System Administrator.

Oracle HRMS and Oracle Training Administration currently provide other methods for generating standard letters and reports using a mail merge, which do not require you to have ADE installed on your PC.

To decide which method you want to use to generate standard letters:

> **See**
>
> Setting Up Standard Letters *Oracle Human Resources UK User's Guide*
>
> Using Letters to Manage Recruitment and Enrollment *Oracle Human Resources UK User's Guide*

▶ **To define a standard letter type:**

1. Enter a name for the letter and select a concurrent program.

   Note: ADE does not use the concurrent program to retrieve data for the mail merge; it uses the view created to specifically retrieve data for the merge. However, it is a required field and you must select a concurrent program (you can can select any one).

   See: Creating Views for Letter Requests: page D – 8

2. In Oracle HRMS, if you want letter requests to be created automatically for applicants, select one or more **assignment statuses** and enable them.

   When an applicant is given one of these statuses, a pending request for this letter type is created automatically. If a pending letter request already exists, the applicant is added to the list of people to receive the letter when you submit the request.

3. In Oracle Training Administration, if you want letter requests to be created automatically for enrollments, select one or more **enrollment statuses** and enable them.

   When an enrollment is given one of these statuses, a pending request for this letter type is created automatically. If a pending letter request already exists, the enrollment is added to the list of people to receive the letter when you submit the request.

4. Save your letter type.

See Also

Standard Letters and Reports: page 4 – 2

Letter Request Setup: page 4 – 3

Creating a Mail Merge Document

You use the mail merge facilities of Word to merge data exported from your database using ADE, to generate standard letters. You set up a WP document for each standard letter you want to generate, to include all the merge fields required to merge the data with the standard text for the letter.

The steps below describe how you can set up a mail merge document in Word for the different types of standard letters you can generate using ADE.

This may be a task for your System Administrator.

Oracle HRMS and Oracle Training Administration currently provide other methods for generating standard letters and reports using a mail merge, which do not require you to have ADE installed on your PC.

To decide which method you want to use to generate standard letters:

See Setting Up Standard Letters *Oracle Human Resources UK User's Guide*

Prerequisites

❑ If your are preparing a mail merge document to generate letters using ADE in **letter request mode**, you must do the following:

• define a letter type for the letter request

• define a view to retrieve data for the merge

• create a LETTER style for the letter. You must include the name of the Word document you plan to set up for the merge.

See: Letter Request Setup: page 4 – 3

❑ If your are preparing a mail merge document to generate standard letters using ADE in **standalone mode**, you must do the following:

• define a view to retrieve data for the merge.

- create a GENERAL style for the letter. You must include the name of the Word document you intend to set up for the merge.

  See: Standard Letter Setup: page 4 –2

❑ If your are preparing a mail merge document to generate standard letters using ADE in **application mode**, you must do the following:

- create a FORM style for the letter, where you name the application window used to retrieve data for the query. You must include the name of the Word document you plan to set up for the merge.

  See: Standard Letter Setup: page 4 –2

▶ **To create a standard Word mail merge document:**

1. Start ADE in standalone mode and log in as the System Administrator.

2. Choose the Test button on the Paths page to display the Select Style window.

3. Select the style to be used to export data for the mail merge.

4. Choose OK to confirm and start Word. Word opens a document called HRIO.RTF which contains all the mail merge fields that match the style.

5. Enter the text for the letter and rearrange the merge fields in the document.

6. Save the finished mail merge document as a Word document (with a .DOC extension) to the Letters directory. This is the directory defined for holding mail merge documents in the ADE Options.

   Suggestion: If you cannot locate the letters directory, launch ADE in **standalone mode** from your PC desktop and choose the Options button to check the path.

See Also

Standard Letters and Reports: page 4 –2

Letter Request Setup : page 4 –3

Standard Letter Setup: page 4 –4

Submitting Letter Requests

You can use ADE to generate standard letters for recruitment or enrollment from Oracle HRMS or Oracle Training Administration. You

use the Request Letter window to view, create and submit letter requests. ADE generates the letters by performing a mail merge.

In Oracle HRMS, pending letter requests may have been created automatically for applicants who are given certain assignment statuses.

In Oracle Training Administration, pending letter requests may have been created automatically for enrollments that are given certain enrollment statuses.

You can also create new letter requests manually. For automatic or manual letter requests, you can manually add names to the list of people to receive the letter.

The requests are pending until you submit them for processing. When you submit a request using the Letter Request window, ADE is invoked to retrieve the required data. It starts MS to perform a mail merge using the data file containing the data exported from your database, to generate the standard letters. If more than one WP document has been set up, you are prompted to select the document for the mail merge.

Prerequisite

❑ Your system must be set up to allow you to generate standard letters using ADE from the Request Letter window.

See: Letter Request Setup: page 4 –3

▶ **To create a manual letter request:**

1. Select the Letter Name for the type of letter you want to request.

2. In Oracle HRMS, select the employees or applicants to receive the letter in the Requested For region.

   The Assignment field displays the organization to which the person is assigned. You can view the other components of the assignment by choosing List of Values from the Edit menu.

3. In Oracle Training Administration, select events or students or both in the Requested For region.

   This depends on how the letter has been set up on your system. For example, an enrollment confirmation letter might be defined so that it is sent to all students with the status Confirmed who are enrolled on the event selected in the Requested For region.

4. Save the request.

▶ **To submit a letter request:**

1. Choose the Merge button:

If there is only one document defined for the letter type, the data transfer commences. You can cancel the transfer by closing the window showing the status of data transferred.

If there is more than one WP document defined for the letter type, select the document you want to use for the mail merge using the Letter Choice window.

See: Choosing a Mail Merge Document: page 4 –5

2.	Once the data is transferred, the merged Word document is displayed.

Using the standard features of Word, you can:

• Check and review the letters in the Word document.

• Save the Word document to save the letters to disk.

• Print the set of letters generated from the merge.

See Also

Letter Request Setup : page 4 –3

Using APIs

Use the APIs provided by Oracle in order to enable modified applications data to be uploaded back to your database. The name of the API must be included in the style used to retrieve the data from your database.

APIs included in the definition of a style must comply with the following rules:

• The procedure must have a minimum of three standard parameters:

– **Object version number.** ADE passes back the version number for each column which must match the version number created for each row transferred by the original. query. If the version numbers don't match, the row cannot be updated.

– **Effective date.** This is used by DateTrack to correct or update information date effective information.

– **DateTrack mode.** This set by ADE to CORRECTION or UPDATE.

You can specify any additional parameters required for the application. The first additional parameter is usually the key to the row, for example, the PERSON_ID.

E

Technical Summary

This appendix provides technical reference information including a summary of parameters passed to ADE, and a description of ADE file formats.

Technical Overview & Troubleshooting

This section includes more detailed technical information that may be required by your System Administrator to maintain ADE and resolve any difficulties that may arise.

Displaying the Version Number

▶ **To obtain the version number for ADE:**

■ Using ADE in **standalone mode**, choose the About button in the ADE Options window, or double click the title banner on any ADE window.

If your System Administrator has enabled debug mode, displaying the version number window writes information to a file that you can use to debug ADE.

Specifying Environment Variables

The System Administrator can define a number of environment variables with this command:

SET HRIO_[value] = drive letter

If you are working with Windows 95 add the command to AUTOEXEC.BAT

If you are working with Windows NT add the command to the Registry

After you have modified either of these files you will need to reboot the PC to make the new variable available to ADE.

The values for environment variables are:

▶ **To specify the location of the Windows directory:**

■ SET HRIO_WINDIR=X:\ (where X is the drive letter).

ADE automatically locates the directory containing WINDOWS. However, it is possible to override this using an environment variable, for example if an installation has the windows directory at a drive root level, for example on the network.

▶ **To define the location of the Windows system directory:**

■ SET HRIO_WINSYS=X:\ (where X is the drive letter).

This will only be required if the system directory is in a non–standard location. The systems directory is only used for checking version numbers of the system files used by ADE.

► **To define a new location for the ADE.INI file:**

■ SET HRIO_ADEDIR=X:\ (where X is the drive letter).

This defines a new location for the ADE.INI file, which is useful when sharing ADE.INI.

► **To define a new location for the ADE and Diagrammer Help files:**

■ SET HRIO_HELP=X:\ (where X is the drive letter).

► **To generate the HRIO.DBG file:**

■ SET HRIO_TRACE=X:\ (where X is the drive letter).

This switches on the generation of a file called HRIO.DBG in the ADE temporary directory. The HRIO.DBG file contains valuable information about the actions performed by ADE. Additionally, this environment variable enables the creation of :

– HRIO.SQL which contains any query performed,

– HRIO.API which contains any calls to an API during upload.

Testing ADE Settings

▶ **To test ADE settings**

1. Choose the Test button on the Options window

2. Select a Style to be tested

3. Choose the OK button

Parameters Passed to ADE

The parameters passed to ADE depend on the method by which it has been launched.

Parameters for Application Mode

When ADE is invoked from the HRMS Applications by means of the icon on the toolbar, a file is written by the Application. This is called HRIO.TXT and is created in C:\ of the machine on which Forms 4.5 is running. It contains:

- The name of the form from which ADE was invoked
- The current date
- The session date
- A flag indicating whether default queries are allowed for the user
- The SQL statement for the last query
- If the current form is a folder, a list of the column definitions for the folde

ADE is passed the username, password and connect string for the Oracle Account to which the Application is connected for the user's responsibility.

Parameters for Letter Request Mode

When ADE is invoked by pressing the Merge button on a Letter Request form, it is run and passed the following parameters on the command line:

- The username, password and connect string for the Oracle Account to which the Application is connected for the user's responsibility.
- The session date
- The letter type name. This represents a single record in the table PER_LETTER_REQUESTS which is due to the user having requested the printing of a set of letters of one type, as defined by a row in PER_LETTER_TYPES.

- The letter request id. This identifies a number of records in PER_LETTER_REQUEST_LINES, each record corresponding to a single letter.

Parameters for Standalone Mode

ADE can be invoked from the desktop in a number of different ways:

- With no parameters. This means that ADE runs in standalone mode; the details of the database to use are taken from ORACLE.INI and OACONFIG.ORA.

- With a specification of the database to connect to in the command line:

  USERID=<user>/<password>@tnsname FNDNAM=<name>

  This is useful for defining a number of different icons for different databases. Note that the user and password are for the AOL gateway account, so there are no security issues with the user seeing these details.

- The keyword OVERRIDE may be placed at the end of the command line. This is used by the System Administrator to correct the checksum in ADE.INI as described earlier.

- The keyword UPLOAD may be placed at the end of the command line. This means that when ADE is run, it can be used to perform uploads in standalone mode.

Note that when ADE is invoked from within the Application in Applications mode, its parameters are:

<user>/<password>@tnsname

User and *password* are for the Oracle account to which ADE is to connect.

If this method is used to invoke ADE from the desktop, then it runs as though it is in Applications mode and reads the last known HRIO.TXT file on the PC.

Finally, when ADE is invoked from the Letter Request form, the parameters passed are in this format:

<user>/<password>@tnsname sd=<date> ln=<letter> lri=<id>

The session date, letter name and letter request id are also passed.

Parameters for the Diagrammers

The organisation and position hierachy diagrammers are separate programs from ADE which simply provides the means of launching

these tools, and connecting them to the correct Oracle account in accordance with the HRMS security model.

However, either diagrammer can be run directly from the desktop by the command:

ORGHIER <user>/<password>@<tnsname> <bgid> <mode>.

The username and password is for the secure user account used by the user, or the Apps account if HRMS secure users are not set up. BGID is the ID of the business group, and MODE is 0 for read only, or 1 for read/write.

The organisation hierachy diagrammer is called ORGHIER and the position hierachy diagrammer is called POSHIER

Styles, Views and Options Supplied with ADE

Supplied Styles

ADE is supplied with several styles to enable your System Administrator to quickly set up a number of general standalone queries, as well as queries for a number of specific windows within Oracle HRMS and Oracle Training Administration. You can modify the styles to create your own styles, or delete styles you do not require.

See Also

Defining Styles: page D – 10

Supplied Views

These are listed in the directory C:\Program Files\ade\sql\views.sql

If ADE was installed in a directory other than C:\Program Files\ade then the location of the sql directory will be different.

Supplied APIs

For a list of supplied APIs:

See *What's New in Oracle HRMS Release 11.0 (Help file)*

Debugging ADE

ADE can be enabled so it can be run in debug mode. This is for internal use by Oracle, which can be used to help resolve difficulties you may encounter using ADE.

ADE can also be enabled so a file called HRIO.DBG is created in the ADE temporary directory with a log of all the actions performed using ADE. This may be used for debugging purposes by Oracle Worldwide Support, Oracle Consultants, or users creating views and styles for use with ADE.

Trace mode is activated by an environment variable in AUTOEXEC.BAT:

Setting the Display Mode for ADE Windows

ADE includes options to enable you to choose how ADE windows are displayed along with other application windows on your desktop. By default, ADE windows are displayed on top of all other application windows.

▶ **To set the display mode for ADE windows:**

1. Using ADE in **standalone mode**, navigate to the Paths page in the Options window.

2. Choose an option for displaying ADE Windows:

   - **Floating** – ADE windows are displayed in the usual mode for Microsoft Windows applications. An ADE window only appears on top of other application windows when it is the active window.

   - **On Top** – ADE windows are always displayed on top of all other application windows displayed on your desktop. This is the default option.

3. Choose the Save button to save your changes.

4. Choose the Back button to save your changes to the ADE settings file.

Application Mode

When ADE is launched from toolbar within Oracle HRMS or Oracle Training Administration, a file is created by the application containing details of the parameters passed to ADE. The file is called HRIO.TXT and it is created in the C:\ directory . The information written to the file includes:

- the name of the form used to launch ADE

- the current date

- the session date

- the username

- the responsibility

- a flag indicating whether default queries are enabled

- the SQL statement for the last query performed

- if the current form is a folder window, a list of the column definitions for the folder.

ADE is passed the username, password and connect string for the Oracle Account used by the application, for the specified responsibility.

Letter Request Mode

When ADE is launched from the Request Letter window in Oracle Human Resources or Oracle Training Administration, the following parameters are passed to ADE from the command line:

- the username, password and connect string for the Oracle Account used by the application, for the specified responsibility.

- the session date.

- the letter type name. This represents a single record in the table PER_LETTER_REQUESTS created when you print a set of letters of one type, defined by a row in PER_LETTER_TYPES.

- the letter request id. This identifies a number of records in PER_LETTER_REQUEST_LINES, where each record corresponds to a single letter.

Standalone Mode

When ADE is launched from a PC desktop in standalone mode, it is not passed any parameters. It obtains the Oracle username, password and connect strings from the ORACLE.INI and OACONFIG.ORA files.

See Also

Security and Control: page A – 3

ADE File Formats

ADE.INI File

The ADE.INI file stores the settings for ADE. It can be viewed using a
text editor such as Windows Notepad. The format of a typical
ADE.INI file is shown below.

☞ **Attention:** You should not make any changes to your
ADE.INI file without consulting your System Administrator.

Entry	Description
[HRIO]	Defines the start of the section containing environment settings.
TEMP=C:\TEMP\	Location of the temporary directory.
WP=C:\MSOFFICE\WINWORD\WIN-WORD	Location of the MS Word executable.
SS=C:\MSOFFICE\EXCEL\EXCEL	Location of the spreadsheet executable.
LETTERS=C:\HRIO\LETTERS\	Location of MS Word documents used for mail merges.
USER=H:\ORAWIN\BIN\PLUS31	Location of a user defined executable.
USER_WORKING=H:\ORAWIN\BIN	Working directory for the user defined program.
DISCOVERER=	Location of Discoverer executable.
DISCOVERER_WORKING=H:\ORA-WIN\BIN	Working directory for Discoverer.
QUERIES=C:\HRIO\QUERIES	Directory used to save queries and results.
ORG=	Location for the Organization Hierarchy Diagrammer.
POS=	Location for the Position Hierarchy Diagrammer.
MAX_RECORDS=	Maximum number of records that can be downloaded to the Data Preview window.
UPDATE_MODE=	Defines whether the data upload facility is enabled (ON/OFF).
VENDOR=	This is either Lotus or Microsoft.

Entry	Description
FNDNAM=	AOL FNDNAM (for running without applications).
GWYUID=	AOL GWYUID (for running without applications).
HELP_URL=	Defines the location of the ADE help files
[PERWSEPI]	Defines the start of a section specifying styles for the Person window – PERWSEPI.
STYLE=Summary of people,,,S	Defines a style that returns a single record when ADE is used in application mode from the Person window.
FIELD=LAST_NAME,Surname,2,1	Defines the first field for the spreadsheet. The column in the view is LAST_NAME, shown on the spreadsheet with 'Surname' as the column header and a width of 2 inches. The trailing 1 is not currently used.
[GENERAL]	Defines the start of a section that contains styles for use by ADE in standalone mode.
STYLE=People,,HRIO_PERSON,M,,MAN-AGER	Defines a style for queries using the HRIO_PERSON view, which returns multiple records for the MANAGER responsibility .
FIELD=EMPLOYEE_NUMBER, Employee number,2,1,V,HRIO_TEST	The first field in the style. The column in the view is EMPLOYEE_NUMBER, shown in the spreadsheet with 'Employee number' as the column header that is 2 inches wide. It is a VARCHAR meaning there is no list of values available. The last parameter is the name of an API for uploading data.
FIELD=SEX,Gender,1,1, HRIO_LOV_GENDER	Indicates there is a list of values for the field that is returned by the view HRIO_LOV_GEN-DER.
FIELD=START_DATE, Hire date,1,1,D	Indicates the column is in date format.
[LETTER]	Indicates the start of a section that define styles used for mail merges within the Request Letter window.
STYLE=Simple Letter, PEOPLE, HRIO_PEOPLE_LETTERS,M,,APPLET-TER	Defines a style called 'Simple Letter', which reads records from the view HRIO_PEOPLE_LETTERS and performs a mail merge with the Word document PEOPLE. The letter type for the style is APPLETTER.

Entry	Description
FIELD=FIRST_NAME, First Name,2,1,V	Defines a field in the style.
[CHECKSUM]	Defines the checksum for the file, used to prevent unauthorized changes.

Saved Query Files

When the Data Preview window is displayed showing the data transferred for a query, the query definition is saved to a file called HRIO.QRY in the Temporary directory. If the query is saved, HRIO.QRY is copied to a file in the Queries directory and saved with a filename NNNNNNNN.QRY, where N represents a number taken from the date and time stamp for the file.

The format of a sample saved query file is shown below.

Entry	Description
[User defined query]	Identifies the file as a user defined query.
Description=Recent joiners to departments 071/072	The description given to the saved query.
Style=People	The style used for the query.
Session date=06/01/96	The effective session date for the query.
[Select details]	Defines the start of a section that defines the selection details (or conditions) for the query.
Gendera=aFemale	Specifies a query condition in the selection details section. The a character is a special separator that appears as a space in the built–in ADE spreadsheet.
[Query]	Defines the start of a section specifying the exact SQL statement for the query.
[Column details]	Defines the start of a section specifying the details of each spreadsheet column used to hold the retrieved data.
FIELD=EMPLOYEE_NUMBER, Employee number,2	Specifies that the data returned from the view column EMPLOYEE_NUMBER is returned in a spreadsheet column with the title 'Employee number' that is 2 inches wide.

Forms 4.5/ADE Communication File

When ADE is launched in application mode from the toolbar within an application, it writes information to a file called HRIO.TXT in the C:\directory of the machine on which Forms 4.5 is running.

The format of a sample HRIO.TXT file is shown below.

Entry	Description
Form	Specifies the name of the application window used to launch ADE .
System date	The system date for the PC used to launch ADE.
Session date	The effective session date when ADE was launched.
User	The name of the AOL user when the user logged in to the application.
Responsibility	The line after this is the name of the AOL re-sonsibility used by the user to log in to the ap-plication.
Query	The full SQL statement for the last query issued by the window before launching ADE.
Default query	Displayed as 'Disabled' or 'Enabled' depend-ing on whether the user can perform default queries in ADE.
ROW_ID	The line after this contains the row id of the current record displayed when ADE was launched.
Folder	Specifies whether the window used to launch ADE is a folder window. If the window is a non–folder window this entry is excluded. The information after this entry defines the col-umns displayed in the folder window.
Column=FULL_NAME, Full Name,1.918	Defines one folder column that includes the column name taken from the view, the prompt for the column and the column width in inches.

Use of Functions and AOL Function Security

Overview

AOL provides the ability to define :

- Users

- Responsibilities

- Menus

- Functions

As delivered, the HRMS system is provided with menus and responsibilities. The System Adminstrator then:

- Sets up users

- Defines which responsibilities a user can have access to.

In addition, AOL provides the ability to define functions, and place these functions on menus, in addition to any forms defined on those menus. If a user invokes a responsibility which uses a menu that has these functions on them, then the user is said to have been granted these functions.

A number of functions are used by ADE; when ADE is launched, either standalone or within the Application, it checks the responsibility in use by the user to locate the menu in use, and thus establish what functions are granted. In Prod–16 and after, these functions are seeded, but the System Administrator must still place them on menus if required. Prior to Prod–16, the functions were not seeded, but the AOL Define Function form can be used to create them.

Defining Functions

Each function has a user name and an internal name. ADE looks for the internal name when checking if a function is granted to a user, and a full list is given later.
The choice of display name is determined by the name allocated by the System Administrator when the function is created, although where Oracle have seeded the functions at Prod–16, the user names name the format of 'ADE: <description>'.

List of Functions

Function	Purpose
HR_HRIO_ORG_READ	Provide read access to Organization Diagrammers
HR_HRIO_ORG_UPDATE	Provide update access to Organization Diagrammers

Function	Purpose
HR_HRIO_POS_READ	Provide read access to Position Diagrammers
HR_HRIO_POS_UPDATE	Provide update access to Position Diagrammers
HR_HRIO_ENABLE_OPTIONS	Allow a user System Administration access to the ADE options, without having such access to the AOL GUI forms. When the user chooses a responsibility to which this function is granted, the ADE Options window is invoked.
HR_HRIO_DEFAULT_QUERY	Allows the user to perform a default query operation in Application mode, ie fetch all columns obtained in the query performed by the form.
HR_HRIO_ENABLE_UPLOAD	Allows the user to perform upload operations.
HR_HRIO_ENABLE_STYLES	Allows the user to automatically create a style from the query
HR_HRIO_ENABLE_VIEWS	Enables the user to generate a view file from the query performed in Applications mode. Typically only granted to System Adminstrators.

F

Error Messages

This appendix lists the most common error messages that you might encounter when running ADE. For each error message, there is a description of the cause of the error and the action you can take to remedy it.

Common Error Messages

Number	Message	Action
1	Cannot do mail merge – path to Word Processor not set up	Ensure that the Word Processor path is defined correctly in the Options screen.
2	Failed to run Word Processor to perform mail merge	Ensure that the Word Processor path is defined correctly in the Options screen
3	Invalid username, password or connect string	Ensure that the command string calling ADE is of the correct format.
4	HRIO called incorrectly from Letter Generation form	Ensure that the command string calling ADE is of the correct format.
5	Failed to open WIN.INI	Ensure that WIN.INI exists, and is in the appropriate directory
6	Failed to find ORACLE.INI	Ensure that ORA_CONFIG is defined in WIN.INI
7	APPLSYS Public account details not defined	Ensure that both FNDNAM and GWYUID are defined, either in the command string or in OACONFIG.ORA
8	Failed to find Oracle Home	Ensure that ORACLE.INI defines ORACLE_HOME, and that this is a valid path.
9	Failed to find LOCAL definition	Ensure that ORACLE.INI defines LOCAL (ie. TWO_TASK)
10	Failed to find PER_TOP	Ensure that OACONFIG.ORA defines PER_TOP
11	Failed to find APPL-TOP	Ensure that OACONFIG.ORA defines APPLTOP
12	Failed to find GWYUID	Ensure that OACONFIG.ORA defines GWYUID
13	Failed to find FNDNAM	Ensure that OACONFIG.ORA defines FNDNAM
16	No responsibility found for user	Assign the user a responsibility on the Application, or log in with a user who has a responsibility already defined
17	Failed to place session date <date> in to database	

Number	Message	Action
18	Failed to read <filename>	Ensure that the filename exists and that it is readable
19	Failed to read <filename>	Ensure that the filename exists and that it is readable
20	TEMP directory not defined in <ADE.INI>	Ensure that TEMP is defined by setting it correctly in the Options screen
21	Directory for Word Processor letters not defined in <ADE.INI>	Ensure that the Letters Path is correctly defined in the Options screen
22	Checksum not found in <ADE.INI>	Ensure that a valid ADE.INI file is being used
23	Failed to open <filename>	Ensure that the file exists
24	Failed to open <filename>	Ensure that the file exists
26	User account details invalid	Ensure that ADE is activated with correct login information
27	Failed to run the Program – either the program is already running, or it is not defined correctly in the Options screen	Ensure that the executable path for that program is correctly defined in the Options screen, and also that it is not already running
28	Failed to open <HRIO.TXT> written by the HR application	Ensure that this file exists on the C: drive of the computer
29	Some information is missing from <HRIO.TXT>	Ensure that the Application properly writes out HRIO.TXT
30	You must specify a username to log in	Supply ADE with a username
31	You must specify a password to log in	Supply ADE with a password
32	Failed to connect to GWYUID	Ensure that the username and password are correctly defined for the Gateway account (in OA-CONFIG.ORA)
33	User has not been registered on database	Enter a known username

Number	Message	Action
34	Failed to connect to Foundation	Connect with a valid username and password
35	You can only log in as <SYSADMIN> in override mode	Log in as System Administrator while in this mode, or run ADE in normal mode
36	You cannot do this when in override mode	Log in as System Administrator while in this mode, or run ADE in normal mode
37	Failed to get information for View	Ensure that the view specified is a valid view which returns rows
38	No entries found for LOV	Ensure that the view returns valid lookups
39	This function cannot be performed until your cell editing is complete	Finish editing the spreadsheet cell before retrying the function
42	Failed to execute SQL statement	
45	Letter not defined for this query	Ensure that an appropriate document exists for this query. If not, then define one
46	Program not defined – use the Options facility of ADE to define this program	Ensure that an executable for this program is defined in the Options window
47	Failed to identify API for Upload	Ensure that a valid API is defined for this query within the Options
48	Failed to open file to store API calls	Ensure that the API file is not already open in some other application
49	Failed to write API call to API file	Ensure that the API file exists, and is not in use by some other application
50	Invalid date	Enter a date in the correct date format (DD–MON–YYYY)
51	Failed to restore saved query in <filename>	Ensure that the file exists, and is not in use by some other application
52	You have not chosen a query style	Chose a query style from the appropriate list.

Number	Message	Action
53	Cannot perform query on View that does not commence with <HRV_>	Change the view to one supported by ADE – one that begins HRV_
54	Failed to read temporary query file	Ensure that the .QRY file exists
55	Query file is in the wrong format	Ensure that a valid .QRY file is passed to ADE
56	Failed to get check view for business group column	Ensure that the view is valid, and has an associated business group.
58	Failed to open <> for writing query	Ensure that a file of the same name is not already in use
59	Failed to find match for fieldname	
61	Failed to get internal value for <look_up>	Ensure that the lookup view is properly defined on the database
62	Failed to write to <file-name>	Ensure that the file is not already in use by another application
63	To modify the select criteria, drag this button on to the table below	Drag the arrow onto the Spreadsheet below
64	Failed to get a list of responsibilities	Ensure that the user has a valid responsibility defined on the application.
65	Failed to get information of this responsibility	Ensure that the responsibility is defined properly on the database
66	User account details invalid	Ensure that the Username and password are valid for the database
67	No business group defined for chosen responsibility	Ensure that a business group has been associated with the responsibility, on the Application
68	Failed to get business group for chosen responsibility	Ensure that a business group has been associated with the responsibility, on the Application
69	You have changed some settings. Please press Save or Undo before returning to the Login Window	Save the settings or undo them, before attempting any other action on the Options screen

Number	Message	Action
70	Warning – you have not included the string '<>' on the command line for <>	Add the appropriate string to the command line for the program
71	Failed to create <ADE.BKP>	Ensure that the drive is not full, or that the file is not already in use by some other application
72	Failed to make temporary copy of <ADE.INI>	Ensure that the drive is not full, or that the file is not already in use by some other application
73	Failed to update <>	Ensure that the file is not already in use by another application
74	Failed to create <filename>	Ensure that the drive is not full, or that the file is not already in use by some other application
75	Failed to open <filename>	Ensure that the file is not already in use by another application
76	Failed to update new version of <ADE.TMP>	Ensure that the drive is not full, or that the file is not already in use by some other application
77	Failed to create <Filename>	Ensure that the drive is not full, or that the file is not already in use by some other application
78	Failed to open <>	Ensure that the drive is not full, or that the file is not already in use by some other application
79	Failed to update new version of <>	Ensure that the drive is not full, or that the file is not already in use by some other application
82	Failed to get list of responsibilities	Ensure that the user has responsibilities defined in the application
83	Failed to create <>	Ensure that the drive is not full, or that the file is not already in use by some other application
84	No column definitions found	Ensure that the style has appropriate columns defined, based on the appropriate view
85	You cannot change to a new page until you have saved your outstanding changes or pressed Undo	User should save or undo changes before attempting to navigate through the Options

Number	Message	Action
86	To fetch data, a style must be selected first	Select a style from the list before attempting to fetch the data
87	Fetch can only be done if no action selected	Select 'None' as the action before attempting to fetch data
88	The last query performed by the Application cannot be identified	Ensure that the Application has actually performed a query
89	Failed to open <> written by the HR Application	Ensure that the file exists, and is not in use by some other application
90	You cannot start a program until you select an action	User should select an action before attempting to press Start
91	Program not defined – check the definition in the Options screen	Ensure that the program has been defined properly in the Options screen, and that its executable path is correct.
92	Cannot use Word because no document is defined for this style	Define a document for the given style, in the Options screen
93	Failed to open temporary query file	Ensure that the drive is not full, or that the file is not already in use by some other application
94	Failed to open query file <filename> for writing	Ensure that the drive is not full, or that the file is not already in use by some other application
95	Failed to build query file <destination>	Ensure that the drive is not full, or that the file is not already in use by some other application
96	Failed to open <>	Ensure that the file exists, and is not in use by some other application
97	File <FILE> is not a valid query file	Ensure that the query file being used is one supported by ADE
98	Failed to find any styles for '<>'	Ensure that a style has been defined appropriately in the Options screen
100	You must enter a style and a form name	Enter a valid style name, and form name.
101	Failed to get list of responsibilities	Ensure that a responsibility has been defined correctly in the Application

Number	Message	Action
102	This style has been defined without columns – data fetch is not possible	Ensure that a valid view is being used, and will select columns
103	Failed to write to <filename>	Ensure that the drive is not full, or that the file is not already in use by some other application
104	Use of Lotus WordPro is not supported	This is not supported
105	Cannot do mail merge – view not defined in style	Ensure that a view has been correctly defined in the Options screen
106	Cannot do mail merge – style must be defined for multiple rows	Ensure that the style supports the return of multiple rows, in the Options screen
107	Failed to switch to Temporary Directory – check Options	Ensure that the temporary directory, defined in the Options screen, is a valid path
108	Failed to get System Administrator Responsibility details	Ensure that the System Administrator has been defined correctly, with responsibilities, in the Application.
109	System Administrator account details invalid	Ensure that the username and password entered are valid for logging in as System Administrator
110	Failed to get list of functions for responsibility	Ensure that the Responsibility chosen has functions defined for it on the Application
111	No style name found in spreadsheet	Ensure that the Spreadsheet being used is one supported by ADE
112	Failed to locate <ADE.INI>	Ensure that an INI file exists in the normal Windows directory, or in the directory specified by the environment variable HRIO_ADEDIR
113	Failed to get information for View	Ensure that the view chosen is properly defined on the database, and that it returns meaningful columns
114	Failed to fetch data from view HRV_LOV_<view>	Ensure that the view chosen is properly defined to return data
115	Invalid style name found in spreadsheet	Ensure that a corresponding style has been defined correctly in the Options screen

Number	Message	Action
116	Failed to find the spreadsheet style in <>	Ensure that the style exists in the current version of ADE.INI.
117	You are not authorised to perform an upload	Log in as a user with the Upload function granted, or grant the current user Upload permission on the Application
118	You cannot upload because the date is invalid	Enter a valid date range
119	Warning – override mode has been chosen	Continue in this mode if appropriate, or run ADE without the OVERRIDE option on the command line
120	Checksum failure – call System Administrator	This may mean that unauthorised changes have been made to the ADE.INI file. Contact your System Administrator
121	Invalid connect string on command line	Ensure that ADE is run with valid command line arguments
122	Failed to write file – check that spreadsheet is not running	Ensure that a spreadsheet is not already running
123	You must enter a style	Enter a style and proceed
125	The style <STYLE> already exists	Enter a style name which does not already exist
126	Failed to open <FILE> for output	Ensure that the drive is not full, or that the file is not already in use by some other application
127	Failed to write to <filename>	Ensure that the drive is not full, or that the file is not already in use by some other application
129	ADE.INI contains an invalid type for this style	Change the given type in the ADE.INI to be a recognised type (V,N,D,B or a lookup view HRV_LOV_<>)
130	Invalid type entered. Please enter an appropriate type	Change the given type in the ADE.INI to be a recognised type (V,N,D,B or a lookup view HRV_LOV_<>)
131	The type associated with this column does not exist as a lookup view. Please check with your System Administrator	Consult with the System Administrator to ensure that either a lookup view exists, or the type is altered to one which is valid.

Glossary

A

Application Mode An ADE session which you launch from within Oracle applications

Assignment Status For employees, used to track their permanent or temporary departures from your enterprise, and to control the remuneration they receive. For applicants, used to track the progress of their applications.

B

Block The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next. See also: *Region, Field*

Business Group The highest level organization in the Oracle HRMS system. A Business Group may correspond to the whole of your enterprise or to a major grouping such as a subsidiary or operating division. Each Business Group must correspond to a separate implementation of Oracle HRMS.

C

Comparison Operator A symbol that allows you to specify a range of values for a query condition. For example, the comparison operator > will select all values greater than the value that you specify.

D

DateTrack When you change your effective date (either to past or future), DateTrack enables you to enter information that takes effect on your new effective date, and to review information as of the new date. See also: *Effective Date*

Default Queries Queries based on the last forms query made within Oracle Applications.

E

Effective Date The date for which you are entering and viewing information. You set your effective date in the Alter Effective Date window. See also: *DateTrack*

F

Field A view or entry area in a window where you enter, view, update, or delete information. See also: *Block*, *Region*

Folder Window A special block or window whose field and record layout you can customize. You can identify a folder block by the Open Folder icon in the upper left corner. You can save your customized field and record layout as a new folder.

Form A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components. See also: *Block*, *Region*, *Field*

FORM Style Allows the export of a record or set of records from a specified window when using ADE in application mode

G

GENERAL Style Allows the export of data directly from the Oracle Applications database when using ADE in standalone mode. The General Style includes an SQL* plus script and the data is retrieved by a view on the server..

L

LETTER Style Allows the export of data for mail merge when using ADE in letter request mode.

Letter Request Mode An ADE session which allows you to export recruitment and enrollment data for mail merge.

Q

Queries The enquiries by which you retrieve information from Oracle Applications.

Query Condition A qualifying statement or set of statements which refine the information retrieved by a query.

Query Value The specific detail attached to a query condition. For example, the query condition of *City* could have the query value of *Boston*

R

Region A collection of logically related fields in a window, set apart from other fields by a rectangular box or a horizontal line across the window. See also: *Block*, *Field*

Responsibility A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities. See also: *Security Profile*,

S

Security Profile Security profiles control access to organizations, positions and employee and applicant records within the Business Group. System administrators use them in defining users' responsibilities. See also: *Responsibility*

Standalone Mode A session in which you log into ADE independently rather than launching ADE from Oracle applications .

Style A specification of the data that you can export for a query.

Style Definition Determines the data retrieved by the query, the format of the exported data, the responsibility that can use the style, and whether the style is enabled for upload.

V

View A definition of the data that will be retrieved for a standalone query. Query views export data from the application to a spreadsheet. List of Value views are used in standalone queries to display a list of values.

Index

A

ADE
  business purpose, 1 –2
  compatible products, 1 –4
  environment, 1 –4
  functionality, 1 –2
  initialization file (ADE.INI), E – 11
  overview, 1 –2
  platforms, 1 –4
  supplied files, E – 11
  version number, displaying, E – 2
AOL security, E – 14
Application mode, when to use, 1 –3
Applications data, editing and uploading, 2–16

B

Business purpose of ADE, 1 –2

C

Comparison operators, 2–12
Compatible applications, A – 3
Creating views for standalone queries, D – 5

D

Debugging ADE, E – 8

E

Effective Date, setting, 2–4
Environment variables, specifying, E – 2
Error messages, F – 2
Exported query data, different ways of using, 2–6
Exporting data, in application mode, 3 –4
Exporting data in standalone mode
  overview, 2–6
  specifying search conditions, 2–8
  without specifying conditions, 2–6

F

Floating display mode, E – 9
Forms 4.5/ADE Communication file, E – 14
Functionality of ADE, 1 –2
Functions, defining, E – 15
Functions and AOL security, E – 14

I

Installation
  on PC with shared network drive, C – 2
  on PC without shared network drive, C – 2
Installation on User PCs, overview, C – 2
InstallShield, B – 4

L

M

O

P

Q

S

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