Using Application Data Exchange and Hierarchy Diagrammers

RELEASE 11*i*

December 1999

ORACLE®

Using Application Data Exchange and Hierarchy Diagrammers, Release 11*i*

The part number for this book is A73298–01.

Copyright © Oracle Corporation 2000. All rights reserved.

Major Contributors: John Woodward and Andrew Moran

Contributors: Steve McMillan, Alvin Roussel

Contents

Preface

Audience for This Guide

Welcome to Release 11*i* of the Application Data Exchange and Hierarchy Diagrammers user guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.

- Application Data Exchange and Hierarchy Diagrammers

  If you have never used Application Data Exchange and Hierarchy Diagrammers, we suggest you attend one or more of the Application Data Exchange and Hierarchy Diagrammers training classes available through Oracle University.

- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User Guide.*

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This guide contains the information you need to understand and use Application Data Exchange and Hierarchy Diagrammers.

This preface explains how this user guide is organized and introduces other sources of information that can help you. This guide contains the following chapters:

- Chapter 1 provides an overview of Application Data Exchange, and explains how you can use it to link Oracle HRMS and Oracle Training Administration (OTA) to desktop tools such as word processors, spreadsheets and data query tools. It also describes the three modes of working with ADE: standalone, application and Letter request.

- Chapter 2 explains how to use Application Data Exchange to perform data queries, and how to export data in standalone mode.

- Chapter 3 explains how to use Application Data Exchange to extract data from Oracle HRMS or OTA then modify the data with desktop spreadsheets, word processors or other applications. You can then upload the data you have modified back to Oracle HRMS or OTA. It also describes how to perform

what–if calculations on your organizational data without affecting the information that is held on your database.

- Chapter 4 explains how to generate standard letters and requests you need in Oracle HRMS and OTA. It describes the three ways of generating letters: standalone, application and Letter request.

- Chapter 5 describes how to setup ADE for each PC you want to use. This is typically a task for a System Administrator and Database Administrator.

- Chapter 6 describes how to graphically view and create hierarchy diagrams for organizations and positions using Oracle HRMS Hierarchy Diagrammers.

Finding Out What's New

From the HTML help window for Application Data Exchange and Hierarchy Diagrammers, choose the section that describes new features or what's new from the expandable menu. This section describes:

- New features in 11*i*. This information is updated for each new release of Application Data Exchange and Hierarchy Diagrammers.

- Information about any features that were not yet available when this user guide was printed. For example, if your system administrator has installed software from a mini pack as an upgrade, this document describes the new features.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Application Data Exchange and Hierarchy Diagrammers.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides unless we specify otherwise.

Online Documentation

All Oracle Applications documentation is available online (HTML and PDF). The technical reference guides are available in paper format only. Note that the HTML documentation is translated into over twenty languages.

The HTML version of this guide is optimized for onscreen reading, and you can use it to follow hypertext links for easy access to other HTML guides in the library. When you have an HTML window open, you can use the features on the left side of the window to navigate freely throughout all Oracle Applications documentation.

- You can use the Search feature to search by words or phrases.

- You can use the expandable menu to search for topics in the menu structure we provide. The Library option on the menu expands to show all Oracle Applications HTML documentation.

You can view HTML help in the following ways:

- From an application window, use the help icon or the help menu to open a new Web browser and display help about that window.

- Use the documentation CD.

- Use a URL provided by your system administrator.

Your HTML help may contain information that was not available when this guide was printed.

Related User Guides

Application Data Exchange and Hierarchy Diagrammers shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user guides when you set up and use Application Data Exchange and Hierarchy Diagrammers.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at http://oraclestore.oracle.com.

User Guides Related to All Products

Oracle Applications User Guide

This guide explains how to navigate the system, enter data, and query information, and introduces other basic features of the GUI available with this release of Application Data Exchange and Hierarchy Diagrammers (and any other Oracle Applications product).

You can also access this user guide online by choosing "Getting Started and Using Oracle Applications" from the Oracle Applications help system.

Oracle Alert User Guide

Use this guide to define periodic and event alerts that monitor the status of your Oracle Applications data.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards*. It also provides information to help you build your custom Oracle Developer forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

User Guides Related to This Product

Using Oracle HRMS – The Fundamentals

This user guide explains how to setup and use enterprise modeling, organization management, and cost analysis. It also includes information about defining payrolls.

Managing People Using Oracle HRMS

Use this guide to find out about using employee management, recruitment activities, career management, and budgeting.

Running Your Payroll Using Oracle HRMS

This user guide provides information about wage attachments, taxes and social insurance, the payroll run, and other processes.

Managing Compensation and Benefits Using Oracle HRMS

Use this guide to learn about compensation setup, entry and analysis, setting up basic, standard and advanced benefits, salary administration, and absence management and PTO accruals.

Customizing, Reporting and System Administration in Oracle HRMS

This guide provides information about extending and customizing Oracle HRMS, managing security, auditing, information access, and letter generation.

Implementing Oracle HRMS

This user guide explains the setup procedures you need to do in order to successfully implement Oracle HRMS in your enterprise.

Implementing Oracle Self–Service Human Resources (SSHR)

This guide provides information about setting up the self–service human resources management functions for managers and employees. Managers and employees can then use an intranet and Web browser to have easy and intuitive access to personal and career management functionality

Using Oracle FastFormula

This guide provides information about writing, editing, and using formulas to customize your system. Oracle FastFormula provides a simple way to write formulas using English words and basic mathematical functions. For example, Oracle FastFormula enables you to specify elements in payroll runs or create rules for PTO and accrual plans.

Using Oracle Training Administration (OTA)

This guide provides information about how to set up and use Oracle Training Administration to facilitate your training and certification business.

Using Oracle SSP/SMP

This guide provdes information about setting up and using Oracle SSP/SMP to meet your statutory sick pay and statutory maternity pay obligations.

Using Application Data Exchange and Hierarchy Diagrammers

This guide provides information about using Application Data Exchange to view HRMS data with desktop tools, and upload revised data to your application. This guide also provides information about using Hierarchy Diagrammers to view hierarchy diagrams for organizations and positions.

Oracle Business Intelligence System Implementation Guide

This guide provides information about implementing Oracle Business Intelligence (BIS) in your environment.

BIS 11*i* User Guide Online Help

This guide is provided as online help only from the BIS application and includes information about intelligence reports, Discoverer workbooks, and the Performance Management Framework.

Using Oracle Time Management

This guide provides information about capturing work patterns such as shift hours so that this information can be used by other applications such as General Ledger.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Application Data Exchange and Hierarchy Diagrammers implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Installation and System Administration Guides

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind, and major issues, for Applications–wide features such as Business Intelligence (BIS), languages and character sets, and self–service applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle One–Hour Install, which minimizes the time it takes to install Oracle Applications and the Oracle 8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle One–Hour Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process in general and lists database upgrade and product–specific upgrade tasks. You must be at either Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0 to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Using the AD Utilities

Use this guide to help you run the various AD utilities, such as AutoInstall, AutoPatch, AD Administration, AD Controller, Relink, and others. It contains how–to steps, screenshots, and other information that you need to run the AD utilities.

Oracle Applications Product Update Notes

Use this guide as a reference if you are responsible for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features and enhancements and changes made to database objects, profile options, and seed data for this interval.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing.

Oracle HRMS Applications Technical Reference Guide

This reference guide contains database diagrams and a detailed description of database tables, forms, reports, and programs for Oracle HRMS, including Application Data Exchange and Hierarchy Diagrammers and related applications. This information helps you convert data from your existing applications, integrate Application Data Exchange and Hierarchy Diagrammers with non–Oracle applications, and write custom reports for Application Data Exchange and Hierarchy Diagrammers.

You can order a technical reference guide for any product you have licensed. Technical reference guides are available in paper format only.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications–embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow–enabled processes.

Training and Support

Training

We offer a complete set of training courses to help you and your staff master Oracle Applications. We can help you develop a training plan that provides thorough training for both your project team and your end users. We will work with you to organize courses appropriate to your job or area of responsibility.

Training professionals can show you how to plan your training throughout the implementation process so that the right amount of information is delivered to key people when they need it the most. You can attend courses at any one of our many Educational Centers, or you can arrange for our trainers to teach at your facility. We also offer Net classes, where training is delivered over the Internet, and many multimedia–based courses on CD. In addition, we can tailor standard courses or develop custom courses to meet your needs.

Support

From on–site support to central support, our team of experienced professionals provides the help and information you need to keep Application Data Exchange and Hierarchy Diagrammers working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

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 guides.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus 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 might 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.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support and office automation, as well as Oracle Applications. Oracle Applications provides the E–Business Suite, a fully integrated suite of more than 70 software modules for financial management, internet procurement, business intelligence, supply chain management, manufacturing, project systems, human resources and sales and service management.

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

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and application products, along with related consulting, education and support services, in over 145 countries around the world.

Your Feedback

Thank you for using Application Data Exchange and Hierarchy Diagrammers and this user guide.

We value your comments and feedback. This guide contains a Reader's Comment Form you can use to explain what you like or dislike about Application Data Exchange and Hierarchy Diagrammers or this user guide. Mail your comments to the following address or call us directly at (650) 506–7000.

> Oracle Applications Documentation Manager
> Oracle Corporation
> 500 Oracle Parkway
> Redwood Shores, CA 94065
> U.S.A.

Or, send electronic mail to **appsdoc@us.oracle.com**.

1

Introduction to Application Data Exchange

Introduction to Application Data Exchange

How Does ADE Support My Business?

Application Data Exchange (ADE) links Oracle HRMS and Oracle Training Administration (OTA) to desktop tools such as word processors, spreadsheets and data query tools. This enables HR professionals to manipulate HR information, with familiar desktop tools, then upload the data back to HRMS and OTA.

What Range of Functionality Does ADE Provide?

ADE provides an extensive range of functionality. You can:

- 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

Application Data Exchange Overview

Application Data Exchange enables you to view HRMS data with desktop tools, and upload revised data to your application.

ADE Environment

Three Modes of Working with ADE

You can use ADE in one of three modes:

- Standalone mode
- Application mode
- Letter request mode

Standalone mode is where you run ADE from your PC desktop without accessing either HRMS or OTA. Use standalone mode to:

- Access query–only data.
- Select a predefined query and export to ADE all fields retrieved by the query.
- Attach search conditions to a predefined query.
- Manipulate the data at the same time as querying.
- Save a query definition so you can run the query without having to redefine it.

Application mode is where you run ADE from a button on your HRMS or OTA application toolbar. Use application mode to:

- Export data that uses folder definitions
- Make use of all 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 it can be exported

Letter request mode is where you run ADE from the Request Letter window in Oracle HRMS or OTA. Use letter request mode to produce mail–merged standard letters for recruitment or enrollment. For example, a letter to trainees to announce the cancellation of a training course. You can also generate automatic Requests for letters 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.

Supported Platforms

ADE can run on Windows 95, Windows 98 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

Starting ADE

To start ADE in standalone mode, select the ADE icon on your PC desktop.

> **Note:** Access to your database is controlled by the same security as Oracle HRMS and OTA, which is set up by your System Administrator.

To start ADE in letter request mode, select the ADE spreadsheet icon after you queried and opened the Request Letter window in Oracle HRMS or OTA.

Starting ADE in Standalone Mode

▶ **To start ADE in standalone mode:**

1. Select the ADE icon.

2. Enter your username and password and choose OK to confirm.

   > **Note:** The Oracle Applications Signon window includes an Options button. The Options button enables you to select the executable files for your desktop and Oracle applications. You can modify paths without having to log on to ADE.

3. Select a responsibility, if prompted.

   The responsibility you select restricts access to your database and is controlled by the same security as Oracle HRMS and OTA. 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.

4. Optionally, set an effective date in the Session Date field.

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

Starting ADE in Application Mode

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

1. Query some data.

2. Select the ADE spreadsheet icon found on the Oracle HRMS or OTA application toolbar. You can also select, Tools/Export Data from the Oracle HRMS or OTA pull down menus.

> **Note:** The ADE spreadsheet icon is shaded until you have queried some data.

Starting ADE in Letter Request Mode

▶ **To start ADE in Letter Request Mode:**

1. Query some data in the Request Letter window.

2. Select the ADE spreadsheet icon found on the Oracle HRMS or OTA application toolbar.

Start Another Application from ADE in Application Mode

You can launch the following applications from ADE:

- A spreadsheet

- A word processor

- Oracle 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 button in ADE standalone mode. The program may be an Oracle application, for example, SQL*Plus, or a third party program.

Applications can be opened directly without transferring any data to the application. Or indirectly and transferring data from your database to the application.

You open an application directly by selecting the program you want to run from the Fetch Data window. You open an application indirectly by first querying some data, ADE transfers all the records for the last query performed in your application or a single record from the current window, and then viewing the data using the built–in ADE spreadsheet. You can then launch, for example, a word processor or spreadsheet application and analyze, process or mail merge the data. You may also upload the data back to the database, depending on setup.

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 window.

See: Defining Paths: page 5 – 29

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.

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

1. 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.

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

1. Choose a style from the ADE Fetch Data window.

2. Select None to transfer data to the built–in ADE spreadsheet.

3. Launch an application to process the data.

2

Data Queries

Data Queries

Can You Use Predefined Styles?

Yes – ADE provides access to predefined styles, in effect predefined queries, of commonly used categories of data. This is useful when you need to refer to a broad range of data.

Can You Specify Conditions before Querying Data?

You can use relational operators to narrow the scope of a search. This enables you to retrieve data that answers a particular search need.

How Can You Use Exported Data?

You can use exported data in several ways. You can use the built in ADE spreadsheet to preview exported data. Or, you can connect to a desktop spreadsheet application and perform the full range of information analysis available with spreadsheet tools.

Data Queries Overview

Using Spreadsheets With ADE

ADE includes a simple built–in spreadsheet, in the Data Preview window, to preview any data retrieved by a query. You can also export data to a spreadsheet application. Doing this enables you to use the special features of your spreadsheet to manipulate information for analysis and graphical representation.

In addition to enabling the export of data, some ADE styles, predefined queries, enable you to make changes to data in the spreadsheet, over time, and upload the modified data back to your database.

You can transfer data from your database to a spreadsheet in both standalone or application mode.

Using ADE in standalone mode, you access your database directly, without opening the Oracle HRMS or OTA application, to export data. You select a style to retrieve information from your database and then 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 – 3

Using ADE in application mode, you retrieve and export information from your database, within the Oracle HRMS or OTA application. You select a style to retrieve a set of records or a single record from the current application window.

Exporting Data Using ADE in Standalone Mode

All the queries you perform in standalone mode use predefined styles. Styles are predefined queries. 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.

You perform a query by selecting a query from the Query Details field in the Define Query window.

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

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

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 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.

Selecting a Query

You must select a query, or style, from those defined on your system. For example, a style 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.

▶ **To select a query:**

1. Select a query from the Query Details pull–down list, using ADE in standalone mode, from the Define Query window.

2. Change the date for the query, if required. The session date determines effective date.

3. Export data, if required, by selecting the Fetch button.

Specifying Search Conditions

The Define Query window enables you to select a predefined query and define conditions for the query. You can specify a single search condition or multiple search conditions to refine the selection of data retrieved by the query.

▶ **To specify search conditions:**

1. Select a query from the Query Details field in the Define Query window.

2. Select a search condition from the Criteria list. For example, select 'City' to query a specific city name from the US Employees predefined query.

3. Drag the button next to the selected query condition, onto the white bar in the Selection Details panel.

    Note: You must ensure the hand pointer is over the white bar before dropping the selected query condition.

4. Use the Query Value window to enter a value for the query condition. Or select a value using the find button if an LoV has been defined.

5. Use the spin box to select a comparison operator.

6. You can specify further conditions for a query to define multiple search conditions.

    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

    To specify multiple search conditions:

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

    - Drop the search condition over one of the white bars.

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

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

Specifying the Data Order

The Define Query window enables you to select a predefined query and define conditions for the query. You can specify the data order returned by the query.

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

1. Select a query condition from the Criteria list in the Define Query window. Drag the query condition onto one of the three order fields in the Fetch Order panel.

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

2. Click the arrow adjacent to the order field to change the sort order. By default, the sort order is ascending.

Exporting the Data for a Query

▶ **To export the data for a query:**

■ Select the Fetch button to export data from the Define Query window. The data is then transferred to the built–in ADE spreadsheet in the Data Preview window.

Specifying a Query Value

Use the Query Value window to specify the detail for a query condition. The Query Value window is displayed automatically when you select a query condition in the Define Query window.

The Query Value window enables you to:

- 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. For example, in date query you can only enter data in a date format, DD/MM/YYYY.

You can select a comparison operator to complete the definition for a condition with 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). See the list of: Comparison Operators: page 2 – 4

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

▶ **To specify a query value:**

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

2. Enter the date in the value field if you are specifying a date value. 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. Enter text in the value field if you are specifying a text string. You can include wildcards in the string and 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. Enter the number in the value field if you are entering a numeric value. Select a comparison operator to retrieve data for a numeric range.

5. Choose OK to confirm the query value.

Saving a Query

You can save a query you have performed and 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. See: Exporting Data Using ADE in Standalone Mode: page 2 – 3

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

2. Click the Save button in the Data Preview window.

3. Enter a description for the query in the Save Query Definition window.

4. Click OK to save the query definition.

Rerunning or Deleting a Saved Query

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.

You can only run or or delete a saved query in standalone mode.

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

1. Open the Load or Delete Query window.

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

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

4. Click Fetch to rerun the query.

▶ **To delete a saved query:**

1. Open the Load or Delete Query window.

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

3. Click the Delete button.

Printing a Query

You can print a query by selecting the print button in the built–in ADE spreadsheet window.

▶ **To print a query:**

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

2. Select the print options using the Print dialog displayed.

3. Click OK to print the query data.

Saving an Application Spreadsheet

To save a spreadsheet you need to transfer your data to your PC, and launch the application spreadsheet from ADE.

> **Note:** The spreadsheet is saved to a file called HRIO. (Spreadsheet file extension).

▶ **Saving the spreadsheet in application mode:**

1. Double–click the ADE button on the applications toolbar.

2. Select a style from the ADE Fetch window.

3. Choose the Spreadsheet option from the ADE spreadsheet window.

4. Select Save in the spreadsheet application.

▶ **Saving the spreadsheet in standalone mode:**

1. Start and logon to ADE from the desktop.

2. Query some data.

3. Select the Spreadsheet option from the Data Preview window.

4. Select Save in the spreadsheet application.

Exporting Data Using ADE in Application Mode

ADE exports data contained in an application window by:

- Re–executing the last query performed in your application then transferring the records ADE

- Transferring the current record displayed in your application

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

Your System Administrator defines a style to specify what records are transferred to ADE.

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

1. 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 OTA to select records you want to export from your database.

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

3. Select a style from list box displayed next to the window name in the ADE Fetch Data window.

   Note: 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. Click the Fetch button to transfer data to the Data Preview window. Use the Back button in the Data Preview window to abandon the transfer.

6. Select an Action radio button and click the Start button to transfer data and launch the application.

   Note: When you launch your spreadsheet application or a word processor, from the ADE Fetch Data window or the Data

Preview window, the data is transferred to a temporary file (HRIO.XLS). Save the file with a new name to prevent it being overwritten the next time the application is launched.

In a mail merge, data from HRIO.XLS will be merged with the standard Word document. The document is defined by your System Administrator.

Data Uploads

Data Uploads

What Are Data Uploads?

You can extract data from Oracle HRMS or OTA then modify the data with desktop spreadsheets, word processors or other applications. You can then upload the data you have modified back to Oracle HRMS or OTA.

What Can I Use Data Uploads For?

You can perform what–if calculations on your organizational data without affecting the information that is held on your database. When you are satisfied the modified information is correct, you can transfer it to your database.

Does ADE Check That Valued Information is Not Being Overwritten on Upload?

Yes. Your System Administrator can define queries that will allow a complete or partial upload of modified information. ADE also provides error checking that enables you to correct and resubmit upload requests.

Data Uploads Overview

The Upload Process

You can only upload data from a query that has been defined for this purpose by your System Administrator. The definition of an upload query specifies which data items are uploaded when modified or not uploaded if modified.

> **Note:** Before information can be uploaded, it must first be downloaded to a spreadsheet. ADE only supports updates to existing information, not inserts.

For example, the Phone's query style enables you to upload changes to Email address and phone number but will not enable you to upload changes to First Name or Last Name.

In addition to the Phone's query style, ADE is also supplied with the Salary Administration query style. This style enables you to download salary proposal details, change the details, and then upload the changed details back to Oracle HRMS or OTA.

Uploading Applications Data

To upload data you must first query some data in either standalone or application mode.

> **Note:** The upload facility must be enabled for your responsibility by the System Administrator.

▶ **To begin an upload in standalone mode:**

1. Click the upload icon on the desktop.

2. Log on by supplying your username and password and selecting a responsibility. The Data Upload window will display.

Once the Data Upload window is displayed you can upload data. See: Parameters for Standalone Mode: page 5 – 14

▶ **To begin an upload in application mode:**

■ Click the Data Upload button. This will display the Data Upload window.

> **Note:** If the data upload button is not available, Data Upload is not enabled.

▶ **To upload data:**

1. Click 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. The spreadsheet is saved in the default directory defined at installation (C:\TEMP).

3. Load the spreadsheet and, optionally, review any changes. Changes are marked by the Status column displaying *Updated* or the cells are highlighted green.

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

5. Select one of the following DateTrack modes:

• DateTrack Correction

Use DateTrack Correction if you do not need to keep a record of previous information. After uploading the changes, the original values are overwritten and lost.

• DateTrack Update

Use DateTrack Update if you want to keep a record of information.

- DateTrack Insert/Update

  Use DateTrack Insert/Update to update future dated information.

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

   Note: An error message is displayed if an error occurs during upload.

Correcting Errors When Uploading Data

If an error occurs during upload an error message is displayed. You can either abandon the upload by choosing the Back button or continue the upload. If you continue the upload, you can either select a prompt on every error or ignore all further errors.

To view row errors double–click the row.

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

Note: You can only modify data within the ADE internal spreadsheet prior to performing an upload: that is, when you have read your spreadsheet changes back into ADE and you need to make minor modifications before starting to upload.

Likely Causes of Errors

Errors will occur if you:

- Select the wrong DateTrack mode

- Update or insert/update where people have future–dated changes and others do not

- Don't set the Type to B (Boolean) in the rows that specify the APIs for the style in the Style Columns page

▶ **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 you want to upload.

2. Enable the upload checkbox.

Letter Generation

Letter Generation

Can I Create Standard Letters with ADE?

You can easily generate all the standard letters and requests you need in Oracle HRMS and OTA. ADE enables you to generate letters in three ways:

- Letter request mode where you can generate standard letters for recruitment and enrollment.

- Standalone mode where you can generate standard letters for other areas of organizational activity. In standalone mode, your letter will be based on a predefined style.

- Application mode where you can generate standard letters for other areas of organizational activity. In application mode the basis for the mail merge will be the last query you performed in your application, or a pre–defined style.

Letter Generation Overview

Standard Letters and Reports

ADE retrieves data, exports the data file and merges it with a standard WP (word processor) document. The WP document includes merge fields and the standard text for the letter.

Standard Letters for Recruitment and Enrollment

You use ADE to generate standard letters for recruitment or enrollment in Oracle HRMS or OTA. You do this with a mail merge from the Request Letter window.

You must define one or more letter types for each letter you want to generate. Each letter type is associated with a status, for example an assignment status or an enrollment status. The status is used to automatically trigger generation of the letters.

In Oracle HRMS, the statuses are applicant assignment statuses and 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 OTA, the statuses are enrollment statuses and are associated with standard enrollment letters or reports. A request for the letter is automatically created when an enrollment is given an associated status.

> **Note:** You can also create new letter requests manually, by adding names to the list of people you want to receive a letter.

Other Standard Letters and Reports

You can also use ADE to create other standard letters and simple mail merge reports. In application mode ADE uses the last query performed in the window or a pre–defined style, to retrieve data for the merge. In standalone mode you select a query style created by your System Administrator to retrieve data for the merge.

Once the data is retrieved from your database, you perform a mail merge by opening Word from ADE.

Creating Standard Letters

These steps describe how to create standard letters or simple reports users can select in ADE in standalone or application mode. You can also use ADE in letter request mode to create standard letters for recruitment or enrollment. These tasks are performed by a System Administrator and certain tasks may require assistance from a Database Administrator.

> **Note:** ADE is not the only way to create standard letters and reports using mail merge.

▶ **To generate standard letters:**

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.

2. Define views to retrieve data for each standard letter in standalone and letter request mode. A number of HRV views can be found in a script delivered as part of a client–side install. Your Database Administrator can customize this script to create any additional views required.

    > **Note:** You do not need to create a view in application mode. The query uses the view of the current window or that of the pre–defined style.

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

    You should create the following styles:

    - A GENERAL style if you are exporting data for the merge in standalone mode

    - A FORM style (where FORM is the name of the window) if you exporting data for the merge from an application window, in application mode

    - A LETTER style if you are exporting data for the merge in letter request mode

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

4. Create a WP merge document.

Choosing a Mail Merge Document

When you submit a request using the Request Letter window, ADE retrieves the data required for the mail merge. If more than one letter style is 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:**

1. Select the document from the list of mail merge documents:

2. Do one of the following:

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

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

C H A P T E R

5

Setup of ADE

Setup of ADE

Do You Need a Separate Licence for ADE?

No. ADE is supplied with Oracle HRMS and OTA.

Are There Installation Options for ADE?

Yes. You will need to install ADE on your System Administrator's PC but can then choose to install ADE as a Non–networked installation for individual PC users.

Does ADE Protect the Security of Data?

Yes, in the same way as Oracle HRMS and OTA, ADE uses a security model that restricts access by responsibility and Business Group.

You can also use ADE styles to restrict access to data. An ADE style specifies what data is retrieved in a query and can be associated with a responsibility.

Setup of ADE Overview

Once installed ADE must be set up for each PC you want to use. This is typically a task for your System Administrator and Database Administrator.

Types of Installation

ADE can be installed on a:

- System Administrator's PC
- Non–networked installation for individual PC users

When you install ADE for an individual PC user, you must:

- Repeat the steps you completed for installation on the System Administrator's PC.
- Configure the installation for an individual PC user.

Security and Control

ADE uses the same security model as Oracle HRMS and OTA. Responsibilities restrict access to data exported from the applications database, and provide other features that enable you to control the view of data retrieved by queries. Styles specify queries and can define responsibilitys to restrict user access to a query. You can also use styles to define how data retrieved by a query is used, for example, a mail merge to generate a set of standard letters.

For standalone mode styles you can specify whether exported data can be edited and uploaded back to the database and so modify your applications data.

Customizing iHelp

Oracle Applications Help has an improved help interface for Release 11*i* which makes it easier to patch, customize and search online help. You can now display a customized set of help files configured by your system administrator to reflect global, local and vertical variants of HRMS. It is possible for your system administrator to specify that your set of help files can include material stored in a document repository, for example, policy documents, market survey information and so on. This means that the help files that you see are directly related to the work that you do.

See: Customizing Oracle Applications Help, *Oracle Applications User's Guide.*

Styles for ADE Setup

ADE Style Definitions

A style defines the data retrieved by a query, the format of the data exported and security. It also specifies any parameters required to process the extracted data. 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.

  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.

  Note: 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.

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

- If 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 used to trigger requests for the letter.

You can also 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.

Style Types

Your can define the following style types:

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

- FORM – exports 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– exports data to a mail merge document and generate standard letters for recruitment or enrollment, using ADE in letter request mode. The data is retrieved by a view on the server, using a SQL*Plus script, included in the style.

- UPLOAD – enables updates to information already downloaded to ADE. The initial information can be downloaded in either standalone 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 and the specific data fields (or columns) for the spreadsheet holding the data retrieved by the style, and the format for each data column.

> **Note:** If you are creating a FORM style, enter the name of the application window.

Depending on the type of style and how the data is retrieved you can 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.

Views for ADE Setup

Views

ADE has the following views:

- Query views

  Used to export data from the database to a spreadsheet application.

- Shadow views

  Used with a style in application mode.

- List of value (LoV) views

  Used in standalone queries to display a list of values. LoV views enable selection of a value from a list, that is restricted to a limited set of values.

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

- HRV views

  Used to retrieve data for each standard letter generated from the Request Letter window.

Outline of Setup Steps

Setup Steps

You must setup ADE individually for each PC you want to use. However, to save time you can copy some of the settings and styles and make them available to all PCs and ADE users. Typically, you might start by setting up ADE on a master PC and selecting the options you want to use as the defaults for other PCs. You can then save the settings and use them as the master settings you can modify for individual ADE users.

ADE is usually setup by your System Administrator. Setup Steps include:

❑   Basic Setup

These steps include configuring the PC before installation, installation, defining paths and miscellaneous options. You also define menus in this step.

These steps include creating views, preparing API scripts and creating styles.

❑   Application Mode Setup

These steps include creating styles.

❑   Letter Request Mode Setup

These steps include defining letter types, creating views and styles and creating mail merge documents.

❑   Additional Setup

You will need to complete additional procedures to install ADE on a network. And complete any procedures, listed below, relevant to your installation.

– Install ADE on a Non–Networked PC

– Create a New Style

– Create Styles for Upload

– Define a Style Type

– Define a Style

– Define Style Columns

– Modify a Style

– Delete a Style

– Set View Prefixes

– Specify Environment Variables

– Test ADE Settings

– Set the Display Mode for ADE Windows

– Display the Version Number

– Debug ADE

Example: Query View

This view 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.

Include in the view any fields you are using to restrict the scope of the search. These will be regarded as mandatory columns when the data is viewed in your spreadsheet.

Additionally, Query views must comply with the following rules:

- The view name should begin HRV_. This prevents a user from modifying their ADE options 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, is based on a secure view that gives the object version number from the base table, as well as using FND_SESSIONS for date effective queries.

Example: Shadow View

This view enables a user to find email and phone information for people.

```
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

This view below enables a user to select gender from a list of values. The LoV view 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

/
```

Example: Letter Request View

This view 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
/
```

Reference Material for ADE Setup

Parameters Passed to ADE

The parameters passed to ADE control how ADE is launched.

Parameters for Application Mode

When ADE is started from the HRMS Applications the toolbar, a file is created by the Application. The file is called HRIO.TXT and is saved to the C:\Temp directory of the computer running Forms 6.0. The file records:

- The form name from where ADE was started

- The current date

- The session date

- A flag recording whether default queries are allowed for the user

- The SQL statement from the last query

- A list column definitions for the folder if the current form is a folder

ADE is also passed the username, password and connect string of the user's responsibility.

The parameters are:

- gwyuid@tnsname fndnam username/password

  Username and *password* are for the Oracle account ADE is connected to and are the same as the application logon.

If this method is used to start 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.

Parameters for Letter Request Mode

When ADE is started by selecting the ADE spreadsheet icon in the 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 is a single record in the table PER_LETTER_REQUESTS. This is because the user has requested a set of one type of letter to be printed, 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 corresponds to a single letter.

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

- gwyuid@tnsname fndnam username/password sd=<date> ln=<letter> lri=<id>

Where:

- sd = (Session Date)

- ln = (Letter name)

- lri =(Letter Request ID)

Parameters for Standalone Mode

ADE can be started in standalone mode in a number of ways, with or without parameters. If no parameters are set ADE runs in standalone mode and details of the database are taken from ORACLE.INI and OACONFIG.ORA.

If parameters are set they are set in the command line. The format is:

- USERID=gwyuid@tnsname FNDNAM=<name>

This is useful for defining a number of different icons for different databases.

> **Note:** The user and password are for the AOL gateway account, so there are no security issues with the user seeing these details.

You can also set keywords at the end of the command line. The keywords you can set in standalone mode are:

- OVERRIDE

  This keyword enables a System Administrator to correct the checksum in the ADE.INI file.

- UPLOAD

  This keyword enables ADE to run uploads in standalone mode. UPLOAD should only be enabled for users who have an Upload responsibility. You should set up an Upload icon for these user's.

Parameters for the Diagrammers

The organization and position hierarchy diagrammers are separate programs that can be started from ADE. Starting the diagrammers in this way makes connection to the correct database easy and meets the Oracle HRMS security model.

However, you can also run diagrammer's from the desktop by using this 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/write, or 1 for read only.

The organization hierarchy diagrammer is called ORGHIER and the position hierarchy diagrammer is called POSHIER

Parameters for Discoverer

ADE can connect to Discoverer in one of two ways, depending on the version of Discoverer you have. You can connect to Discoverer with a username and password, which means limited security. Or, in the latest version of Discoverer, you can connect with a username, responsibility and password. Connecting in this way ensures strict security and limits a user's access to data, by responsibility.

To use the enhanced security model you launch Discoverer in Application mode. You do this by appending the text fragment APPSMODE to the Discoverer path you set in the ADE Options Tab.

> **Note:** APPSMODE is only available in the latest version of Discoverer.

You can still open old and new versions of Discoverer from ADE without setting APPSMODE. You can do this by not appending the mode to the Discoverer path.

> **Note:** Discoverer's Reporting User's are not supported in ADE.

Supplied Styles

ADE is supplied with several styles that 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 OTA. You can modify these styles, create your own, or delete styles you do not require.

> **Note:** To use the supplied styles you must run the hradevws.sql script.

Supplied Views

You supplied views are located in the product directory:

- $PER_TOP/admin/sql

Supplied APIs

For a list of supplied APIs:

See: Publicly Callable Business Process APIs, *Customizing, Reporting, and System Administration in Oracle HRMS.*

ADE File Formats

You may need to view the settings displayed in the ADE.INI file, the Saved Query Files, and the Forms 6.0/ADE Communication File.

ADE.INI File

The ADE.INI file stores the settings for ADE. You can view the file 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.

Entry	Description
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.
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.

Entry	Description
STYLE=People,,HRIO_PERSON,M,,MANAGER	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_GENDER.
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,APPLETTER	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.
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 in 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.
Gender=Female	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,	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 6.0/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:\Temp directory of the machine on which Forms 6.0 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.

Entry	Description
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 responsibility used by the user to log in to the application.
Query	The full SQL statement for the last query issued by the window before launching ADE.
Default query	Displayed as 'Disabled' or 'Enabled' depending 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 columns 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

AOL enables you to define:

- Users
- Responsibilities
- Menus
- Functions

Oracle HRMS system is supplied with sample menus and responsibilities. The System Administrator must setup user's and define their responsibilities.

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 selects 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
HR_HRIO_POS_READ	Provide read access to Position Diagrammers
HR_HRIO_POS_UPDATE	Provide update access to Position Diagrammers
HR_HRIO_ENABLE_OPTIONS	Enables 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	Enables the user to perform a default query operation in Application mode, i.e. fetch all columns obtained in the query performed by the form.
HR_HRIO_ENABLE_UPLOAD	Enables the user to perform upload operations.

Function	Purpose
HR_HRIO_ENABLE_STYLES	Enables 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 Administrators.

Reference Material for ADE Installation

What Happens During the Installation of ADE

Once you have chosen the desired component InstallShield will carry out a number of steps. The steps are:

- Pre–installation
- Installation
- Post–installation

Pre–Install

During pre–install InstallShield will find the applications associated with the files extensions .doc (documents), .xls (spreadsheets), and .dis (Discoverer). These will be used to set the appropriate Paths in your ADE initialization file.

The following directories will be created beneath your Destination folder:

- \Letters – for letters used with ADE
- \Oracle – for Oracle files required for ADE
- \SQL – for SQL files used by ADE. This folder contains the script that should be run if you want to use seeded ADE styles
- \Queries – for query files generated by ADE
- \Backups – for any backed up ADE.ini file
- \Help – for help files used by ADE

Install

The install process will move copy all the required files to the appropriate directories on your PC.

Post–Install

The post install process will:

- Update the ADE.ini paths copied onto your PC
- Backup any existing ADE.ini file to the Backups directory
- Copy the modified ADE.ini onto your PC
- Add an ADE shortcut to your Start>Program Menu
- Register Oracle Objects file (oraipsrv.reg)

- Register ADE's spreadsheet tool (vcf15.ocx)

- Register ADE's language library (aderes.dll)

- Add a destination folder to the Path environment setting for NT

- Modify the autoexec.bat to include the ADE directory in the Path setting for Windows 95 or 98

Once the post–install process is complete you should reboot you PC to enable the changes.

See: Publicly Callable Business Process APIs, *Customizing, Reporting, and System Administration in Oracle HRMS.*

ADE Setup

Once ADE is installed, it must be configured for each PC so that users can retrieve and export the information they require. The System Administrator must define the paths to your word processor or spreadsheet application, define the required styles, and define any letter types and mail merge documents.

Setup Steps: Basic Setup

Setup Steps: Application Mode Setup

Setup Steps: Letter Request Mode Setup

Setup Steps: Additional Setup

> **Note:** You will need to complete additional procedures to install ADE on a network drive. And complete any procedures, listed below, relevant to your installation.

- Modify a Style: page 5 – 52
- Delete a Style: page 5 – 53
- Set View Prefixes: page 5 – 54
- Specify Environment Variables : page 5 – 55
- Test ADE Settings: page 5 – 57
- Set the Display Mode for ADE Windows: page 5 – 58
- Debug ADE: page 5 – 59
- Display the Version Number: page 5 – 60

Step 1: Performing Pre–requisites Prior to ADE Install

You must install 32–bit SQL*Net, included in your setup files, before you install ADE.

Once 32–bit SQL*Net is installed, configure the 32–bit TNSNAMES file to connect to your database. Check you can connect with 32–bit SQL*Plus.

> **Note:** In some versions of 32–bit SQL*Net only allow editing of the TNSNAMES through the SQL*Net Easy Configuration tool.

If you intend to use Organization and Position diagrammers, you must also install 16–bit SQL*Net. However, this means you must maintain two TNSNAMES.ora files. A 16– bit .ora file, in your ORAWIN code tree, and a 32–bit .ora file, in your ORANT or ORAWIN95 code tree.

> **Note:** As part of an 11i upgrade all existing HRV views are removed. This includes any Views you have created. We recommend you save any Views you have found useful.

Step 2: Running InstallShield

InstallShield enables you to install and register ADE.

▶ **To run InstallShield:**

1. Close all programs.

2. Locate the directory that contains the ADE Setup program.

3. Double–click the Setup.exe file.

   This will start the InstallShield program and display a number of screens. The screens include a:

   • Welcome screen

   • Choose Destination Location screen

      Note: By default ADE is installed in C:\Program Files\ADE.

   • Select Components screen

      This screen enables you to select the correct environment. For example:

      – ADE for Release 10sc

      – ADE for Release 10.7NCA

      – ADE for Release 11

      – ADE for Release 11*i*

4. Following the Select Components screen, InstallShield will copy files to your PC.

See: Reference Material for ADE Installation: page 5 – 23 for further information about the Install program.

Step 3: Defining Paths

On initial setup a System Administrator must log on to ADE, using the SYSADMIN username and password, and define application paths. This is done with the Options button on the ADE Signon window.

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

You can define paths for the following applications:

- A word processor
- A spreadsheet
- An HR Organization Diagrammer
- An HR Position Diagrammer
- Discoverer
- A user defined program, for example, a SQL*Plus pages script, and the working directory for the program.

Suggestion: To identify the paths for a program on the Windows desktop, select the icon and choose the Properties option then select the shortcut tab.

▶ **To define paths:**

1. Start ADE in standalone mode.

2. Click the Options button to open the Paths Tab in the Option Window.

3. Define paths for any applications or programs used with or launched from ADE. Specify the drive in every field.

   Note: Executable files are assumed to have the .exe extension. You do not need to enter this explicitly.

   Note: To launch Discoverer in Application mode you need to append this text fragment, APPSMODE, to the path. Application mode is only available in the latest version of Discoverer and is used to enable stricter security.

4. Accept the defaults or define paths, found in the Directories region, for the following ADE working directories, a:

   - Temporary directory for storing temporary files such as spreadsheet files. The default is C:\TEMP.
   - Query directory for storing saved query definitions. The default is C:\Program Files\ADE\QUERIES.
   - Letters directory for storing WP documents set up for mail merges. The default is C:\Program Files\ADE\LETTERS.

> **Note:** The default location for queries and letters assumes that ADE is installed in the C:\Program Files\ADE directory. If ADE is installed in any other directory, then the letter and query directories will be subdirectories of that location. For example, if ADE were installed in D:\HRPROGRAMS\ADE then the letters directory will be found in D:\HRPROGRAMS\ADE\LETTERS.

5. Select the Save or Undo buttons to save or undo your changes.

6. Select the Back button to save your changes to the ADE settings file.

7. Select the Test button to run the program and check the ADE settings.

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

Step 4: Set Miscellaneous Options

Miscellaneous options enable you select, the number of rows that can be downloaded, AOL parameters, the Help URL and the name of your database.

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

> **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 or you are using Release 11*i* of Oracle HRMS.

See: Reference Material for ADE Setup: page 5 – 13

▶ **To Set Miscellaneous Options:**

1. Start ADE in standalone mode with a System Administrator Responsibility.

2. Select the Misc. Tab from the Options Window.

3. Modify the option settings and specify the:

   • Maximum number of records that can be downloaded to a spreadsheet. The default is 2000 rows.

   • AOL Gateway name details.

   • AOL Foundation name details.

   • Help Base URL

   • Name of the database

4. Select the vendor for the word processor and spreadsheet used with ADE (Microsoft or Lotus).

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

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

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

   See: Testing ADE Settings: page 5 – 57

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

Step 5: Defining Menus

Access to ADE in standalone and letter request mode are subject to the security profile used by Oracle HRMS and OTA. They are also subject to any responsibility attached to a query style.

You must add ADE functions to a menu for a specified responsibility. This will enable users to access to ADE. Use the Menus window to do this.

See: Menus Windows, *Oracle Applications User's Guide*

See: Defining Menus, *Customizing, Reporting, and System Administration in Oracle HRMS.*

See: Reference Material for ADE Setup : page 5 – 13

The ADE seeded functions follow.

Seeded Function	Description
HRIO Enable Options	Enables users to access 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.
HRIO View Organization	Enables users to launch the Organization Hierarchy Diagrammer but prevent them from creating or modifying hierarchies.
HRIO Update Organization	Enables a user to launch the Organization Hierarchy Diagrammer and edit organization hierarchies.
HRIO View Position	Enables a user to launch the Position Hierarchy Diagrammer to display position hierarchies but prevent them from creating or modifying hierarchies.
HRIO Update Position	Enables a user to launch the Position Hierarchy Diagrammer and edit position hierarchies.
HRIO Enable Upload	Enables a user to select the Upload button on the Fetch Data window (using ADE in application mode) and upload modified applications data exported from ADE in the same session.
HRIO Enable Styles	Enables a user to use the data in the Data Preview window (running ADE in application mode) to create a new style. A button appears in the window for creating the style.

Seeded Function	Description
HRIO Enable Views	Enables a user to use data in the Data Preview window (running ADE in application mode) to create a new view. A button appears in the window that requests ADE create a SQL file that contains a view using the SQL issued by the form. This can 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.
HRIO Default Queries	Enables a user to transfer data based on the last query performed on an application window. You can also transfer data from a folder window using the current folder definition view.

Step 6: Creating Views for Standalone Queries

Views installed on the server are used to retrieve data for standalone queries. A number of HRV views can be found in a script. The script is called hradevws.sql and is saved in the product directory $PER_TOP/admin/sql. Your Database Administrator can customize this script to create additional views, which must be installed on the server.

See: Views for ADE setup: page 5 – 6

See: Reference Material for ADE Setup : page 5 – 13

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.

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

APIs included in the definition of a style must have a minimum of three standard parameters:

- Object version number

  ADE passes back the version number for each column. This 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 date effective information.

- DateTrack mode

  This is set by ADE to CORRECTION, UPDATE.

You can specify additional parameters as well, for example, the PERSON_ID.

See: Reference Material for ADE Setup : page 5 – 13

Step 8: Create Styles for Standalone Queries

A style for a standalone query must be defined as GENERAL and include the name of the view created on the server to retrieve the data.

You can now complete the standard style procedures. See: Defining a Style Type: page 5 – 49

Step 9: Creating Styles for Application Queries

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

> **Note:** You do not need to define a view to retrieve data for the query; the last query performed on the window is used to retrieve the data. If a view is defined however the data will be queried from this view.

See: Defining and Sharing Styles: page 5 – 46

See: Reference Material for ADE Setup : page 5 – 13

Step 10: Defining Letter Types

If you want to generate automatic requests for recruitment or enrollment letters you must define a letter type. Each letter type associates a standard letter with one or more assignment or enrollment statuses in Oracle HRMS or OTA.

The letters are generated with a mail merge from the Request Letter window.

> **Note:** There are other methods for generating standard letters and reports using a mail merge. To decide which method you want to use to generate standard letters.

See: Letter Generation, *Customizing, Reporting and System Administration in Oracle HRMS*

▶ **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 5 – 39

2. Select one or more assignment statuses and enable them.

   When an applicant is given an assignment status, a pending request for this letter type is created. If a pending letter request already exists, the applicant is added to the list of people and is sent a letter when you submit the request.

3. Select one or more enrollment statuses and enable them.

   When a student is given an enrollment status, 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 and is sent a letter when you submit the request.

4. Save your letter type.

Step 11: 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. Sample HRV views can be found in the hradevws.sql script. 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 OTA.

To generate letters you must create a view that includes a column defined as LETTER_REQUEST_ID from the PER_LETTER_REQUEST_LINES table. The per_letter_request_lines view must have one or more columns in the table with other tables and views in the database. For example, you might use PERSON_ID. The view must also retrieve data for each merge field defined for the standard letter.

See: Reference Material for ADE Setup : page 5 – 13

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 5 – 5:

A letter request style must also include the name of the:

- View created to retrieve the data

- Letter defined as the Letter Type

- Document ADE will use to perform the mail merge.

The other parameters you must define are standard for creating any type of style See: Defining and Sharing Styles: page 5 – 46.

See: Reference Material for ADE Setup : page 5 – 13

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

You use the mail merge facilities of Word, to merge data exported from by ADE from your database, to generate standard letters.

> **Note:** Oracle HRMS and OTA provide other methods to generate standard letters and reports. To decide which method to use

See: Letter Generation: *Customizing, Reporting, and System Administration in Oracle HRMS.*

▶ **Prerequisites for generating letters:**

To generate letters using ADE in letter request mode, you must:

- 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: Creating Standard Letters: page 4 – 4

To generate standard letters using ADE in standalone mode, you must:

- 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 Letters and Reports: page 4 – 3

To generate standard letters using ADE in application mode, you must:

- 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 Letters and Reports: page 4 – 3

▶ **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 that 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.

Installing ADE on a Non–Networked PC

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

After installation, copy the following files from the System Administrator's PC to the user's PC:

- ADE.INI

    Note: You may 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

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

Users who have a responsibility that enables them to upload data should set up an Upload icon on their desktop.

Creating a New Style

To create a new style you must use ADE in standalone mode and use the SYSADMIN responsibility and password.

▶ **To create a new style:**

1. Select the Styles page from the Options window in ADE standalone mode.

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: Defining a Style Type: page 5 – 49

> **Note:** If you are creating a FORM style, you must enter the form name for the application window (as an 8 character code). To find the form name select the About Oracle Applications option from the Help menu in the appropriate form.

3. Select a responsibility for the style in the Responsibility field. 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 define:

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

   • 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:** A number of views are supplied in the VIEWS115.SQL script. To use these views, run the script.

5. Enter the name of the letter in the Letter field if you are creating a style for a letter request. This is the Letter Type you have defined in Oracle HRMS or OTA.

6. Enter the name of the document ADE uses for the merge if the style retrieves data for a mail merge to generate letters.

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

7. If the data exported for a 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 APIs in Release 11*i* see: Publicly Callable Business Process APIs, *Customizing, Reporting and System Administration in Oracle HRMS*

8. Check the Multiple Rows box if you want multiple records to be returned by a FORM style.

   The style uses the last query 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 the current record only is returned.

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

10. 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.

Sharing Styles

▶ **To share styles:**

■ Place the ADE.INI on the network so that each PC can access the style and then set environment variables in the AUTOEXEC.BAT of each PC. For example, SET HRIO_ADEDIR=D:\ADE.

Creating Styles for Upload

Uploads can be enabled in application or standalone mode. In Applications mode, you define a view to shadow the view used by the applications form. In Standalone mode, there may already be a suitable HRV view in the system, however it is likely you will need to define one.

The columns the view returns are determined by the API used for upload.

For the current list of APIs in Release 11*i* see: Publicly Callable Business Process APIs, *Customizing, Reporting and System Administration in Oracle HRMS*

You must return the following columns:

- 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.

Use the Style Columns page to enter the following numbers in the Upd? column. By entering a number you can control whether a field can be updated.

Number	Description
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.

Number	Description
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.

In the Style Columns page specify the B Boolean API to use with the style. See: Defining Style Columns: page 5 – 50

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 the hradevws.sql script.

The ability to upload data is controlled by AOL function security.

See Use of Functions and AOL Function Security: page 5 – 20

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

Defining a Style Type

Use the Enter Style and Form window to create a new style. You must enter a name for the style and define the style type.

ADE uses different types of styles, see: Style Types: page 5 – 5

▶ **To define a style type:**

1. Click the Create Style button in the Styles page. The Enter Style and Form window is displayed.

2. Enter a name for the style.

3. In the Form name field define a:

    • Form style by entering the name of the form

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

    • Standalone style by entering GENERAL

    • Letter style by entering LETTER

4. Click OK to return to the Styles page in the Options window. This will complete the style definition.

Defining Style Columns

The columns defined for a style, specify which column in the spreadsheet holds the data returned by the query. 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 in standalone mode.

Prerequisite

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

See: Creating a New Style: page 5 – 44

▶ **To define columns for a style:**

1. Select the Style Columns page, using ADE in standalone mode, from the Options window.

2. Select the style in the Style field.

3. Select 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. Enter the name of the field title for the column in the spreadsheet.

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

5. 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).

   • Columns for the view used by the application window (for a FORM style).

   Suggestion: If you don't know 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.

6. Enter the width of the column (expressed as a decimal number in inches) 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. The numbers are:

- 0

  The field is displayed but cannot be updated in the spreadsheet

- 1

  The field is displayed and can be updated in the spreadsheet

- 2

  The field is not displayed

  Note: You can only modify applications data and upload it back to the database using a style defined for upload. ADE must also be running in standalone mode. See: Creating Styles for Upload: page 5 – 47

7. Enter the field type for the column. You can define a field type as:

- V (Varchar)

- N (Numeric)

- D (Date)

  You can also define 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.

8. Double click in a cell to display the full cell contents in the Edit Cell window to modify a column or edit the entries for the column.

9. Highlight the row that defines the style column and choose the Paste button to insert a new style column.

10. Highlight the row that defines the style column and choose the Cut button to delete a style column.

11. Click the Save button to save the style. Use the Undo button to cancel any changes.

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

Modifying a Style

You can modify an existing style and create a new style. You can also edit the data columns defined for a style.

▶ **To modify a style:**

1. Select the Styles page,using ADE in standalone mode, from the Options window.

2. Select the style from the list of styles.

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

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

▶ **To modify a style column:**

1. Select the Styles Columns page,using ADE in standalone mode, from the Options window.

2. Edit the entries for the column.

3. Double click a cell to display the full cell contents in the Edit Cell window.

4. Click 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.

Setting View Prefixes

To enable you to control which views are displayed in the Styles page you can set the prefixes of the views you need in ADE.

You must log on as a System Administrator to access the ADE Options window.

▶ **To add new view prefixes:**

1. Select the Views page, using ADE in standalone mode, from the Options window.

2. Enter the view prefix.

3. Click the Add Prefix button. The prefix is now displayed in the list of view prefixes.

4. Click the Save button to save the changes. Use the Undo button to cancel any changes.

▶ **To remove view prefixes:**

1. Select the Views page, using ADE in standalone mode, from the Options window.

2. Select the view prefix to be deleted from the list.

3. Click the Remove Prefix button.

4. Click the Save button to save the changes. Use the Undo button to cancel any changes.

Specifying Environment Variables

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

- SET HRIO_[value] = drive letter

  Note: If you are working with Windows 95 or 98 add the command to AUTOEXEC.BAT.

  Note: If you are working with Windows NT add the setting to your System Environment.

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

▶ **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 specify 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 specify 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 specify 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. Click the Test button on the Options window in standalone mode.

2. Select a Style.

3. Click the OK button.

Setting the Display Mode for ADE Windows

ADE has several display options you can choose. By default, ADE windows are displayed on top of all other application windows but you can also choose to have ADE appear only when it is the active window.

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

1. Select the Paths page, using ADE in standalone mode, from the Options window.

2. Choose a display option by selecting the appropriate radio button:

   - On Top

     Windows are always displayed on top of all other application windows displayed on your desktop. This is the default option.

   - Floating

     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.

3. Click the Save button to save your changes.

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

Debugging ADE

ADE can record a log of all actions. The log is saved in a file called HRIO.DBG. The log is used by Oracle Worldwide Support, Oracle Consultants, or users creating views and styles to help resolve difficulties you may encounter with ADE.

▶ **To Enable Trace Mode:**

■ Set this variable in AUTOEXEC.BAT:

SET HRIO_TRACE=ON

Displaying the Version Number

▶ **To find the ADE version number:**

- Click the About button in the ADE Options window, or double click the title banner on any ADE window, using ADE in standalone mode.

- Right click the HRIOMAIN.exe in Windows Explorer and select the Version Tab.

Introduction to Hierarchy Diagrammers

Introduction to Hierarchy Diagrams

You view hierarchy diagrams for organizations and positions by using the Oracle HRMS Hierarchy Diagrammers.

What Types of Hierarchy Can You Create?

You create organization and position hierarchies to reflect reporting lines and control access to information in your enterprise:

- Organization hierarchies show reporting lines and other hierarchical relationships between organizations in an enterprise.

- Position hierarchies show line management reporting in each organization or throughout the enterprise, where you use positions to define roles.

You can set up a primary hierarchy and as many secondary hierarchies as required to show all the reporting lines and other hierarchical relationships in your enterprise.

Can You See a Graphical View of the Hierarchies in Oracle HRMS?

Yes. There are two Hierarchy Diagrammers that allow graphical display and manipulation of hierarchies. They are:

- The Organization Hierarchy Diagrammer

- The Position Hierarchy Diagrammer.

Is it Easy to Create and Maintain Hierarchies with the Diagrammers?

Yes. You launch the Hierarchy Diagrammers within Oracle HRMS, so you can create hierarchies and then make intuitive drag–and–drop changes. Although you can also make these changes by using the forms in Oracle HRMS, the Hierarchy Diagrammers provide you with an easier alternative. Any changes made using the Hierarchy Diagrammers are also reflected in HRMS forms, and are stored in your database.

You can additionally:

- Create new versions of existing hierarchies

- Copy existing hierarchies to create new ones

- Create future–dated hierarchies to prepare for reorganizations in advance

- Print pictorial representations of organization and position hierarchies

Overview

Setting Up the Hierarchy Diagrammers

The security features for the Hierarchy Diagrammers restrict your access to them. Depending on the access rights you are granted by your system administrator:

- You may not have access to launch or use either of the Hierarchy Diagrammers.

- You may be able to launch one or both of the Hierarchy Diagrammers to view existing organization or position hierarchies. If you only have access to view hierarchies, you are prevented from creating or modifying hierarchies.

- You may be able to launch one or both of the diagrammers to view, create or modify organization or position hierarchies.

The Hierarchy Diagrammers use the same security model as Oracle HRMS and access to them is restricted by your responsibility. Your system administrator must include functions on the menu for your responsibility to enable you to access these options.

The Hierarchy Diagrammers are launched within Oracle HRMS from Application Data Exchange (ADE). You must have ADE installed and set up so that you can use the diagrammers. By default, you cannot launch the Hierarchy Diagrammers from ADE. The options for the diagrammers appear greyed out on the ADE Fetch Data window, if your system administrator has not set up the diagrammers so you can use them.

The functions that are predefined for controlling access to the Organization or Position Hierarchy Diagrammers are as follows:

- HRIO View Organization – allows you to launch the Organization Hierarchy Diagrammer to display existing organization hierarchies; you are prevented from creating or modifying organization hierarchies.

- HR Update Organization – allows you to launch the Organization Hierarchy Diagrammer to create and modify organization hierarchies.

- HRIO View Position – allows you to launch the Position Hierarchy Diagrammer to display existing position hierarchies; you are prevented from creating or modifying position hierarchies.

- HRIO Update Position – allows you to launch the Position Hierarchy Diagrammer to create and modify position hierarchies.

You must also define the paths for the diagrammers within ADE. Your system administrator may define these as part of the set up for ADE.

Menu and Toolbar Commands

The following commands can be accessed from the Hierarchy Diagrammer menus. They enable you to create, edit, save and print hierarchy diagrams and control the display of hierarchy diagrams on your desktop.

Some of these commands can also be accessed from the toolbar, which provides quick access to commands you use often.

New   (File menu/Toolbar)

Opens an empty diagram window for the current hierarchy diagram to enable you to display multiple views of the diagram. to create a new view of the hierarchy, drag an organization or position from the Hierarchy Values window to the new window. All changes made in the new window are also displayed in the main window. You can also select this command from the toolbar.

Open   (File menu/Toolbar)

Opens a new diagram window displaying the current hierarchy diagram to enable you to display multiple views of a diagram. The position or organization highlighted in the main window when you select the command, is displayed at the top level in the new window. All changes made in the new window are also displayed in the main window. You can also select this command from the toolbar.

Close   (File menu)

Closes the current hierarchy diagram, without prompting you to save.

Save   (File menu/Toolbar)

Saves changes made to the hierarchy to your database.

Print   (File menu/Toolbar)

Prints the hierarchy diagram displayed in the active diagram window.

Print Preview   (File menu)

Shows how the hierarchy diagram will look before you print it. Use the command buttons to change the view of the diagram. You can also print the diagram directly from the Print Preview window.

Print Setup (File menu)

Enables you to change the printer settings. You can select a printer and printing options, and change the default printer.

New Structure (File menu)

Enables you to create a new organization or position hierarchy. You can create a new version of an existing hierarchy and copy an existing hierarchy to create a new one.

Exit   (File menu)

Exits the Hierarchy Diagrammer and prompts you to save any changes.

Remove   (Edit menu/Toolbar)

Removes the highlighted organization or position from the current hierarchy and any subordinate organizations or positions. Only removes organizations and positions from the hierarchy and does not delete them from your database. You cannot remove the top level organization or position.

Undo All   (Edit menu/Toolbar)

Undoes all changes since your last save.

Background Color (Edit menu)

Enables you to change the background color for diagram windows.

Line Color (Edit menu)

Enables you to change the color of the connecting lines in hierarchy diagrams.

Font   (Edit menu)

Enables you to change the font, font style and size for the name labels displayed on the hierarchy diagram. The default font is the System font.

Node Properties   (Edit menu/Toolbar)

Enables you to change the color, text color, and shape of all the nodes displayed on a hierarchy diagram.

Erase Window (View menu)

Erases the contents of the current hierarchy diagram window. Only removes the display; it does not make changes to your database.

Horizontal (View menu/Toolbar)

Changes the view of the current hierarchy diagram to an organization chart style layout.

Vertical (View menu/Toolbar)

Changes the view of the current hierarchy diagram to a stacked hierarchical layout.

Column   (View menu/Toolbar)

Changes the view of the current hierarchy diagram to an expanded, stacked hierarchical layout.

Zoom In   (View menu/Toolbar)

Enlarges the current hierarchy diagram.

Zoom Out   (View menu/Toolbar)

Shrinks the current hierarchy diagram.

Toolbar   (View menu)

Toggles the toolbar on and off.

Status Bar   (View menu)

Toggles the status bar at the bottom of the main Hierarchy Diagrammer window on and off.

Help   (Help menu/Toolbar)

Displays help for using the Hierarchy Diagrammer.

Displaying Hierarchy Diagrams

You display a hierarchy diagram in the Hierarchy Diagrammer by selecting an Organization or Position Structure and the Version of the structure from the lists displayed at the top. The Hierarchy Diagrammer includes a built–in editor to enable you to graphically view, create and modify hierarchy structures.

The Hierarchy Diagrammer displays two types of windows:

- The Hierarchy Values window that displays all the organizations or positions defined for a hierarchy.
- The Hierarchy Diagrammer window for viewing, creating and modifying hierarchy diagrams.

Hierarchy Values Window

The Hierarchy Diagrammer uses the following symbols to show the relationships between positions or organizations displayed in the Hierarchy Values window.

Figure 6 – 1 **Symbols in the Hierarchy Values Window**

You can only display one Hierarchy Values window in a Hierarchy Diagrammer.

Hierarchy Diagram Window

The Hierarchy Diagram window displays a diagrammatic representation of an organization or position hierarchy. You use the Hierarchy Diagram window to graphically view, create or modify an organization or position hierarchy. You can view several Hierarchy Diagrams windows at a time, displaying different views of a hierarchy, so that you can drill down from the top level to the lowest levels in a hierarchy.

▶ **To display a hierarchy diagram:**

- Click and drag an organization or position from the Hierarchy Values window and drop it into the adjacent Hierarchy Diagram window.

The organization or position is displayed with all its subordinates. It is taken as the top level in the hierarchy and higher level organizations or positions are not displayed.

▶ **To display multiple views of a hierarchy diagram:**

■ Click on an organization or position that will represent the top level in the hierarchy view, than choose Open from the File menu.

Each view of the hierarchy is displayed in its own Hierarchy Diagram window.

Expanding and Collapsing Diagrams

Each organization or position in a hierarchy diagram includes a small button for expanding or collapsing diagrams. The functions are:

Collapsible parent organization or position with subordinates displayed. Double–click the button to collapse subordinate organizations or positions.

Expandable parent organization or position with hidden subordinates. Double–click the button to expand the parent and display subordinate organizations or positions.

Organization or position with no subordinates.

Using the Menus

Use the Hierarchy Diagrammer menus to create, edit, save and print hierarchy diagrams and control the display of hierarchy diagrams on your desktop.

Menu Summary

- The File menu: page 6 – 12 provides commands for opening and closing hierarchy diagram windows, saving and printing a hierarchy diagram. It also includes a command for creating a new hierarchy diagram.

- The Edit menu: page 6 – 14 provides commands for undoing changes, removing an organization or position and its subordinates, and selecting the display preferences for hierarchy diagrams.

- The View menu: page 6 – 15 provides commands for changing the display within a Hierarchy Diagrammer.

- The Window menu provides commands for changing the display of windows in a Hierarchy Diagrammer.

- The Help menu provides help for using a Hierarchy Diagrammer.

Using the File Menu

The File menu provides commands for opening and closing hierarchy diagram windows, and for saving and printing hierarchy diagrams. It also includes a command to enable you to create a new hierarchy diagram from an existing diagram.

Some of these commands can also be accessed from the toolbar, which provides quick access to commands you use often.

Summary of Commands

New (Toolbar)

Opens an empty diagram window for the current hierarchy diagram to enable you to display multiple views of the diagram. to create a new view of the hierarchy, drag an organization or position from the Hierarchy Values window to the new window. All changes made in the new window are also displayed in the main window.

Open (Toolbar)

Opens a new diagram window displaying the current hierarchy diagram to enable you to display multiple views of a diagram. The position or organization highlighted in the main window when you select the command, is displayed at the top level in the new window. All changes made in the new window are also displayed in the main window.

Close

Closes the current hierarchy diagram, without prompting you to save.

Save (Toolbar)

Saves changes made to the hierarchy to your database.

Print (Toolbar)

Prints the hierarchy diagram displayed in the active diagram window.

Print Preview

Shows how the hierarchy diagram will look before you print it. Use the command buttons to change the view of the diagram. You can also print the diagram directly from the Print Preview window.

Print Setup

Used to change the printer settings. You can select a printer and printing options, and change the default printer.

New Structure

Enables you to create a new organization or position hierarchy. You can create a new version of an existing hierarchy and copy an existing hierarchy to create a new one.

Exit

Exits the Hierarchy Diagrammer and prompts you to save any changes.

Using the Edit Menu

The Edit menu provides commands for undoing changes, removing an organization or position and its subordinates, and selecting the display preferences for hierarchy diagrams.

Some of these commands can also be accessed from the toolbar, which provides quick access to commands you use often.

Remove   (Toolbar)

Removes the highlighted organization or position from the current hierarchy and any subordinate organizations or positions. Only removes organizations and positions from the hierarchy and does not delete them from your database. You cannot remove the top level organization or position.

Undo All   (Toolbar)

Undoes all changes since your last save.

Background Color

Enables you to change the background color for diagram windows.

Line Color

Enables you to change the color of the connecting lines in hierarchy diagrams.

Font

Enables you to change the font, font style and size for the name labels displayed on the hierarchy diagram. The default font is the System font.

Node Properties   (Toolbar)

Enables you to change the color, text color, and shape of all the nodes displayed on a hierarchy diagram.

Using the View Menu

The View menu provides commands for changing the display within a Hierarchy Diagrammer.

Some of these commands can also be accessed from the toolbar, which provides quick access to commands you use often.

Erase Window

Erases the contents of the current hierarchy diagram window. Only removes the display; it does not make changes to your database.

Horizontal (Toolbar)

Changes the view of the current hierarchy diagram to an organization chart style layout.

Vertical   (Toolbar)

Changes the view of the current hierarchy diagram to a stacked hierarchical layout.

Column   (Toolbar)

Changes the view of the current hierarchy diagram to an expanded, stacked hierarchical layout.

Zoom In   (Toolbar)

Enlarges the current hierarchy diagram.

Zoom Out (Toolbar)

Shrinks the current hierarchy diagram.

Toolbar

Toggles the toolbar on and off.

Status Bar

Toggles the status bar at the bottom of the main Hierarchy Diagrammer window on and off.

Using the Toolbar

Use the toolbar for quick access to commands you use often. The toolbar provides an alternative way of using commands included on the Hierarchy Diagrammer menus.
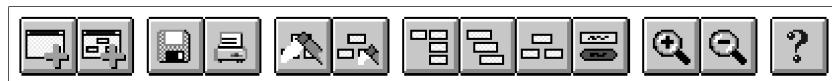
The following commands (from left to right) are included on the toolbar:

New   (File menu)

Opens an empty diagram window for the current hierarchy diagram to enable you to display multiple views of the diagram. to create a new view of the hierarchy, drag an organization or position from the Hierarchy Values window to the new window. All changes made in the new window are also displayed in the main window.

Open   (File menu)

Opens a new diagram window displaying the current hierarchy diagram to enable you to display multiple views of a diagram. The position or organization highlighted in the main window when you select the command, is displayed at the top level in the new window. All changes made in the new window are also displayed in the main window.

Save   (File menu)

Saves changes made to the hierarchy to your database.

Print   (File menu)

Prints the hierarchy diagram displayed in the active diagram window.

Remove   (Edit menu)

Removes the highlighted organization or position from the current hierarchy and any subordinate organizations or positions. Only removes organizations and positions from the hierarchy and does not delete them from your database. You cannot remove the top level organization or position.

Undo All   (Edit menu)

Undoes all changes since your last save.

Node Properties   (Edit menu)

Enables you to change the color, text color, and shape of all the nodes displayed on a hierarchy diagram.

Horizontal (View menu)

Changes the view of the current hierarchy diagram to an organization chart style layout.

Vertical (View menu)

Changes the view of the current hierarchy diagram to a stacked hierarchical layout.

Column (View menu)

Changes the view of the current hierarchy diagram to an expanded, stacked hierarchical layout.

Zoom In (View menu)

Enlarges the current hierarchy diagram.

Zoom Out (View menu)

Shrinks the current hierarchy diagram.

Help (Help menu)

Displays help for using the Hierarchy Diagrammer.

Launching a Hierarchy Diagrammer

You launch the Hierarchy Diagrammers from within Oracle HRMS using ADE (Application Data Exchange). ADE enables you launch other applications including the Organization Hierarchy Diagrammer and the Position Hierarchy Diagrammer. Once launched, the Hierarchy Diagrammers run in their own window on your PC desktop.

▶ **To launch a Hierarchy Diagrammer:**

1. In Oracle HRMS, click the ADE icon on your application toolbar to launch ADE.

2. Using the ADE Fetch Data window, select the option for the Hierarchy Diagrammer you want to use.

3. Choose the Start button to launch the Hierarchy Diagrammer. ADE is iconized while the diagrammer is running.

Creating an Organization or Position Hierarchy

Use the Hierarchy Diagrammers to graphically create an organization or position hierarchy.

You can create a new hierarchy by:

Setting Up a New Hierarchy

Use the Hierarchy Diagrammers to graphically set up a new organization or position hierarchy. You must firstly define all the organizations or positions for the hierarchy and create the hierarchy within Oracle HRMS to specify:

- A unique name for the hierarchy

- The version number and start date for the hierarchy

- The top organization or position in the hierarchy

- The subordinate organizations or positions for the hierarchy.

You do not need to define the position of subordinates relative to each other in the hierarchy; the Hierarchy Diagrammers provide a graphical tool to place subordinates in an organization or position hierarchy.

See: Creating an Organization, and Creating Organization Hierarchies in *Using Oracle HRMS – The Fundamentals*, or

See: Defining a Position, and Creating a Position Hierarchy in *Using Oracle HRMS – The Fundamentals*

▶ **To set up a new organization or position hierarchy:**

1. In Oracle HRMS, launch a Hierarchy Diagrammer..

2. Select an Organization or Position Structure from the list and the version number for the hierarchy.

3. In the Hierarchy Values window, select the organization or position that represents the top level in the hierarchy and drag it to the Hierarchy Diagram window.

4. Build the hierarchy by adding organizations or positions, working from the top level down.

   - To add an organization or position, drag it from the Hierarchy Values window to the organization or position that will be its parent and drop it on top to add it to the hierarchy. The cursor displays a small rectangle when you are on top of the parent value.

   - You can move and remove organizations or positions to modify the hierarchy until you have the correct structure.

5. Save your hierarchy. The Hierarchy Diagrammer commits the changes to your database to create the new hierarchy.

Creating a New Version of an Existing Hierarchy

Use the Hierarchy Diagrammers to create a new version of an existing organization or position hierarchy.

▶ **To create a new version of an existing hierarchy:**

1. In Oracle HRMS, launch a Hierarchy Diagrammer.

2. Select New Structure from the File menu to display the Structure Version window.

3. Select the name of an existing hierarchy.

   The version number for the new hierarchy is automatically defaulted to create a new version following on from the previous one. The start date for the new version is taken as today's date, but you can modify the date, for example, to create future–dated versions.

   Note: Overlapping versions of a hierarchy cannot exist. When you create a new version of an existing hierarchy, the system automatically gives an end date to the existing version. Oracle HRMS retains all previous versions of hierarchies for historical information.

   You can also create a new hierarchy by copying an existing hierarchy and modifying it.

4. Modify the hierarchy to add, move or remove organizations or positions to create the new hierarchy.

5. Save your hierarchy. The Hierarchy Diagrammer commits the changes to your database to create the new hierarchy.

Copying an Existing Hierarchy

Use the Hierarchy Diagrammers to create a new organization or position hierarchy by copying an existing one.

▶ **To copy an existing hierarchy:**

1. In Oracle HRMS, launch a Hierarchy Diagrammer.

2. Select New Structure from the File menu to display the Structure Version window.

3. Enter or select a name for your new hierarchy.

    If you enter a new, unique name for your hierarchy, the version number automatically defaults to 1. If you select the name of an existing hierarchy, the version number is defaulted to create a new version following on from the previous one. The start date for the new version is taken as today's date. You can modify the date, for example, to create future–dated versions.

4. Modify the hierarchy to add, move or remove organizations or positions to create the new hierarchy.

5. Save your hierarchy. The Hierarchy Diagrammer commits the changes to your database to create the new hierarchy.

Modifying an Organization or Position Hierarchy

Use the Hierarchy Diagrammers to graphically change your hierarchies to reflect changes in reporting lines or access to information.

You can modify an organization or position hierarchy by:

Adding Organizations or Positions to a Hierarchy: page 6 – 24

Moving Organizations or Positions in a Hierarchy: page 6 – 26

Removing Organizations or Positions From a Hierarchy: page 6 – 25

Adding Organizations or Positions to a Hierarchy

Use the Hierarchy Diagrammers to add organizations or positions to an organization or position hierarchy.

▶ **To add organizations or positions to a hierarchy:**

1. In Oracle HRMS, launch a Hierarchy Diagrammer.

2. Select an Organization or Position Structure from the list and the version number for the hierarchy you want to modify.

3. Select the top level organization or position for the hierarchy from the Hierarchy Values window and drag it to the Hierarchy Diagram window.

   The top level organization or position is displayed with all its descendants.

4. In the Hierarchy Values window, select the organization or position you want to add to your hierarchy, drag it to the organization or position that will be its parent and drop it on top to add it to the hierarchy.

   The cursor displays a small rectangle when you are on top of the parent value.

5. Save your changes to the hierarchy. The Hierarchy Diagrammer commits the changes to your database.

Removing Organizations or Positions From a Hierarchy

Use the Hierarchy Diagrammers to remove organizations or positions from an organization or position hierarchy.

▶ **To remove organizations or positions from a hierarchy:**

1. In Oracle HRMS, launch a Hierarchy Diagrammer.

2. Select an Organization or Position Structure from the list and the version number for the hierarchy you want to modify.

3. Select the top level organization or position for the hierarchy from the Hierarchy Values window and drag it to the Hierarchy Diagram window.

   The top level organization or position is displayed with all its descendants.

4. Select the organization or position you want to delete from your hierarchy, and drag and drop it into the Hierarchy Values window, or press the Delete key to remove it and all its descendants.

   You are not deleting the organization or position from your database; you are just removing it from the hierarchy.

5. Save your changes to the hierarchy. The Hierarchy Diagrammer commits the changes to your database.

Moving Organizations or Positions in a Hierarchy

Use the Hierarchy Diagrammers to move organizations or positions in an organization or position hierarchy.

▶ **To move organizations or positions in a hierarchy:**

1. In Oracle HRMS, launch a Hierarchy Diagrammer.

2. Select an Organization or Position Structure from the list and the version number for the hierarchy you want to modify.

3. Select the top level organization or position for the hierarchy from the Hierarchy Values window and drag it to the Hierarchy Diagram window.

   The top level organization or position is displayed with all its descendants.

4. Select the organization or position you want to move in your hierarchy, drag it to the organization or position that will be its parent and drop it on top to add it to the hierarchy.

   The cursor displays a small rectangle when you are on top of the parent value.

5. Save your changes to the hierarchy. The Hierarchy Diagrammer commits the changes to your database.

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

Access
  for updating hierarchies, 6 – 3
  for viewing hierarchies, 6 – 3
Adding
  organizations to hierarchy, 6 – 24
  positions to hierarchy, 6 – 24
ADE
  business purpose, 1 – 2
  compatible products, 1 – 4
  functionality, 1 – 2
  initialization file (ADE.INI), 5 – 16
  Installation, 5 – 23
  platforms, 1 – 4
  version number, displaying, 5 – 60
AOL security, 5 – 20
APIs, Supplied with ADE, 5 – 16
Application mode, when to use, 1 – 3
Applications data, editing and uploading, 3 – 4

B

Business purpose of ADE, 1 – 2

C

Commands, for menus and toolbar, 6 – 5
Comparison operators, 2 – 4

Controlling access, 6 – 3
Copying, existing hierarchy, 6 – 22
Creating
  a position hierarchy, 6 – 19
  an organization hierarchy, 6 – 19
  new version of existing hierarchy, 6 – 21
Creating views for standalone queries, 5 – 6

D

Data Upload, 3 – 4
Debugging ADE, 5 – 59
Displaying hierarchy diagrams, 6 – 8
  collapsing diagrams, 6 – 10
  expanding diagrams, 6 – 10
  multiple views, 6 – 9

E

Environment variables, specifying, 5 – 55
Existing hierarchy
  copying, 6 – 22
  creating a new version from, 6 – 21
  modifying, 6 – 23
Exporting data, in application mode, 2 – 14
Exporting data in standalone mode
  overview, 2 – 3
  specifying search conditions, 2 – 6

Reader's Comment Form

Using Application Data Exchange and Hierarchy Diagrammers
A73298–01

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information we use for revision.

- Did you find any errors?

- Is the information clearly presented?

- Do you need more information? If so, where?

- Are the examples correct? Do you need more examples?

- What features did you like most about this manual? What did you like least about it?

If you find any errors or have any other suggestions for improvement, please indicate the topic, chapter, and page number below:

_____

_____

_____

_____

_____

_____

_____

Please send your comments to:

       Oracle Applications Documentation Manager
       Oracle Corporation
       500 Oracle Parkway
       Redwood Shores, CA 94065
       Phone: (650) 506–7000   Fax: (650) 506–7200

If you would like a reply, please give your name, address, and telephone number below:

_____

_____

_____

Thank you for helping us improve our documentation.