

Customizing the Presentation of Data:

Using Folders

Overview

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Customizing the Presentation of Data

Overview

You can customize the presentation of data or fields by creating "folders". One advantage of a folder is that you can customize it to display only the records you want to see.

You can easily define and alter the query criteria for any folder and save that criteria in a folder definition.

You can also control the sorting order of the records you display in a multiple-record folder.

A folder is a special block in which the field and record layout can be customized. A folder is distinguished from a regular block by the following:

- An Open Folder button appears in the upper-left corner of a folder block.
- An enabled Folder Tools button appears on the toolbar when your cursor is in a folder block.

Folder Overview

Although you have access to all the records of a specific entity in a folder, you can create a customized folder to retrieve only a subset of records and display those records in a specific layout.

You can save your customizations to a folder definition, which defines the layout of your fields and the query criteria used to retrieve your subset of records.

Section Objectives

At the end of this section, you should be able to:

Customize the layout of data in a folder form.

Use the folder tool palette.

Manage folder definitions.

Query records in a folder.

Export a folder definition into Excel.

Creating Folders

Creating folders will

- Enable you to customize the presentation of data.
- Display only those fields that are of interest to you.
- Instantly modify the width, sequence, and prompts of the fields you want to display.
- Display a subset of records based on your specific criteria.
- Display a subset of records in a specific order.
- Save your folder customizations for later use.
- Automatically query for a subset of records each time you open a specific folder.
- Keep your folder customizations private or make them public for others to access.
- Make your customizations the default layout for a folder.

Folder Tool Locations - SDSU

Bold type indicates commonly-used inquiries
(B) = button

Application	Window Title	Data Elements	Navigation Path	Existing Folders?
Assets	Assets	asset #, tag #, description, asset key, serial #, make, model, location	Assets, Financial Information, (B) Find	No
Assets	Transaction Detail	cost, depreciation method, date placed in service	Assets, Financial Information, (B) Find, (B) Books, (B) Transactions, (B) Details	No
Assets	View Source Lines	invoice, po number, project, supplier, etc.	Assets, Financial Information, (B) Find, (B) Source Lines	No
General Ledger	Detail Balances	period, currency, year-to-date	General Ledger, Account, (B) Detail Balances	Yes
General Ledger	Journal Entry Inquiry	batch status, batch name, journal name, debits, credits	General Ledger, Journals, (B) Find	Yes
General Ledger	Journals	batch, journal entry, source, debits, credits	General Ledger, Account, (B) Journal Details	Yes
General Ledger	Summary Balances	period, account, Currency, PTD	General Ledger, Account, (B) Show Balances, (B) Summary Balances	No
General Ledger	Detail Average Daily Balances	date, currency, EOD, PATD, QATD, YATD	General Ledger, Average, (B) Show Average Balances	No
General Ledger	Summary Average Daily Balances	account, currency, EOD, PATD, QATD, YATD	General Ledger, Average, (B) Show Average Balances, (B) Summary Balances	No
Payables	Distributions	amount, account, gl date, description, match quantity, project, etc.	Payables, Invoices, Invoices, (B) Find, (B) Distributions	Yes
Payables	Invoice Distributions Summary	invoice #, supplier, distribution line number, expense account, etc.	Payables, Invoices, Invoice Distributions, (B) Find	No
Payables	Invoices	supplier, invoice, invoice amount, date goods received, pmt amt, etc.	Payables, Invoices, Invoices, (B) Find	Yes
Payables	Payments	bank, batch name, currency, payment method, status, etc.	Payables, Payments, Payments	No
Payables	Invoice Batches	batch name, date, control count, control amount, etc.	Payables, Invoices, Invoice Batches	No
Payables	Payment Batches	batch name, payment date, pay group, document, next step, etc.	Payables, Payments, Payment Batches	No

Customizing the Presentation of Data

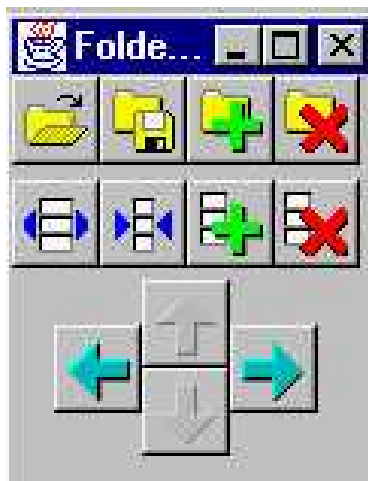
Application	Window Title	Data Elements	Navigation Path	Existing Folders?
Payables & Purchasing	Suppliers Summary	supplier, supplier #, terms, supplier type	Payables, Suppliers, (B) Find OR Purchasing, Supplier Inquiry, (B) Find	No
Purchasing	Notifications Summary	priority, due date, to, subject, etc	Purchasing, Notifications	No
Purchasing	Purchase Order Distributions	PO #, description, charge account, amount, approved status	Purchasing, Purchase Order Summary, (B) Find, (B) Lines, (B) Shipments, (B) Distributions	Yes
Purchasing	Purchase Order Headers	PO #, description, status, supplier, amount, buyer	Purchasing, Purchase Order Summary, (B) Find	Yes
Purchasing	Purchase Order Lines	PO #, category, description, quantity, amount, buyer, etc.	Purchasing, Purchase Order Summary, (B) Find, (B) Lines	Yes
Purchasing	Purchase Order Shipments	PO #, ship to, quantity due, quantity received, buyer, status, etc.	Purchasing, Purchase Order Summary, (B) Find, (B) Lines, (B) Shipments	Yes
Purchasing	Receipt Headers Summary	receipt #, supplier, ship date	Purchasing, Receiving Transaction Summary, (B) Find	No
Purchasing	Receipt Transaction Summary	transaction type, quantity, PO #, supplier, destination	Purchasing, Receiving Transaction Summary, (B) Find, (B) Transactions	No
Purchasing	Requisition Distributions Summary	req #, line, description, amount, charge account, status	Purchasing, Requisition Summary, (B) Find, (B) Lines, (B) Distributions	Yes
Purchasing	Requisition Headers Summary	req #, description, status, total preparer, type	Purchasing, Requisition Summary, (B) Find	Yes
Purchasing	Requisition Lines summary	req #, category, description, amount, requestor, supplier, buyer	Purchasing, Requisition Summary, (B) Find, (B) Lines	Yes
Receivables	Account Details	balance due, status, dispute amount	Receivables, Collections, Account Details, (B) Find	No
Receivables	Transactions Summary	source, number, bill to customer, class reference, ship to customer, etc.	Receivables, Transactions, Transaction Summary	No
Receivables	Transaction Batches Summary	source, name date, currency, status, gl date, comments	Receivables, Transactions, Batches Summary	No
Receivables	Installments	number, seq. Class, days late, due date, etc.	Receivables, Transactions, Transaction Summary, (B) Installments	No

The Folder Tools

When you navigate to a folder block, the Folder Tools button becomes enabled on the toolbar. Choose this button to display the folder tools on your screen.

Using Folder Tools

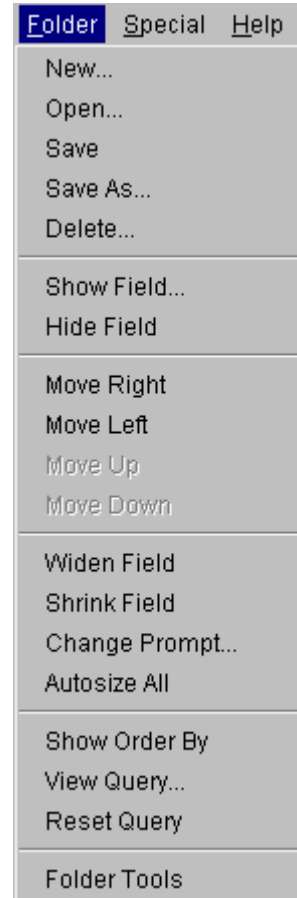
Button	Action
Open Folder	Opens another folder definition.
Save Folder	Saves the current folder definition.
Create New Folder	Creates a new folder definition.
Delete Folder	Deletes an existing folder definition.
Widen Field	Increases the width of a field.
Shrink Field	Decreases the width of a field.
Show Field	Shows a currently undisplayed field.
Hide Field	Hides a currently displayed field.
Move Left	Swaps the current field with the field to its left in a multiple-record block. In a single-record block, moves the current field one character width to the left.
Move Right	Swaps the current field with the field to its right in a multiple-record block. In a single-record block, moves the current field one character width to the right.
Move Up	Moves the current field up by one character height for a single-record display.
Move Down	Moves the current field down by one character height for a single-record display.



The Folder Menu

You can customize the presentation of data in a folder using the Folder menu. Many of these items are also available from the Folder Tools icon on the toolbar.

Menu Item	Action
New	Creates a new folder definition
Open	Opens a saved folder definition.
Save	Saves changes to the current folder definition.
Save As	Saves current folder definition to a new name.
Delete	Deletes an existing folder definition.
Show Field	Displays a field that is currently hidden.
Hide Field	Hides the current field.
Move Right	Moves the current field to the right.
Move Left	Moves the current field to the left.
Move Up	Moves the current field up (not available in all folders).
Move Down	Moves the current field down (not available in all folders).
Widen Field	Increases the width of the current field.
Shrink Field	Decreases the width of the current field.
Change Prompt	Changes the prompt for the current field.
Autosize All	Adjusts all field widths proportionally to fill the window. This cannot be undone without resizing each window.
Show Order By	Toggles the display of the Order By Buttons so you can specify the sort order for the first three field columns.
View Query	Displays the query criteria for the current folder definition.
Reset Query	Erases the current query criteria.
Folder Tools	Displays the folder tool palette.



Folder Definitions

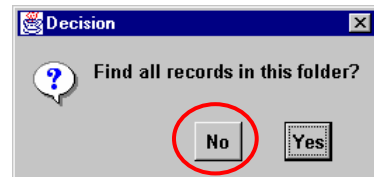
Once you customize a folder's layout and query criteria, you should save your customizations to a folder definition. You can create and save new folder definitions or open and delete existing folder definitions. When you open a new folder definition, the layout for the new folder definition replaces the layout for the current folder definition.

Opening Existing Folders

To open an existing folder definition:

1. Choose Folder Open to load a predefined folder definition. (Or select the Open Folder button located in the upper-left corner of the folder block.)
2. Select a private or public folder definition from the list window that is displayed, and choose OK to replace the current folder definition with the new folder definition.

IMPORTANT: If you see this Decision box, JUST SAY NO! If you choose yes, you may retrieve ALL records in the database, instead of just those specified in your query.

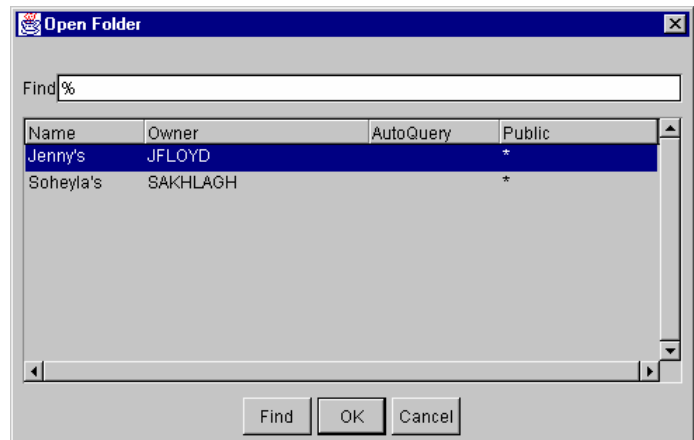


To save changes to a folder definition:

1. Choose Folder Save to save any layout or query changes made to the current folder definition or choose Folder Save As to save the current folder definition under a new name.
2. Choose OK.

Note: If you save a folder definition to “open as default” and then open another folder definition and save that second definition also as “open as default,” the second definition is reset as the new default.

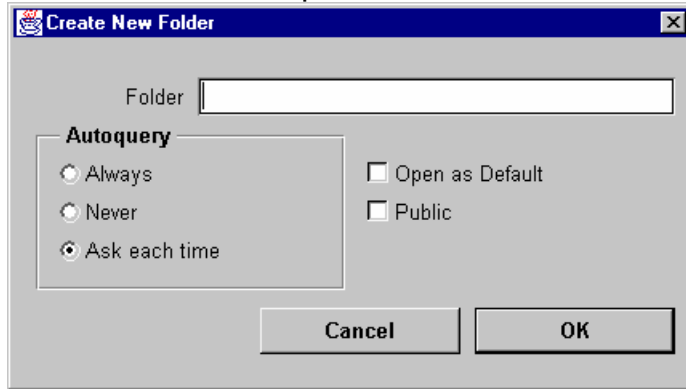
If you modify a public folder definition in any way, saving it makes it a private folder definition. However, if you open and save a public folder definition to “open as default” with no other changes, you merely save a reference of that folder definition as a private default.



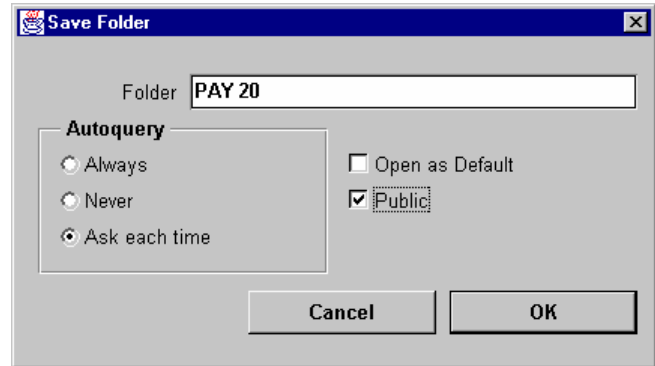
Creating New Folders

To create a new folder definition:

1. Choose Folder **New**.
2. Enter a new and unique folder name in the *Folder* field.



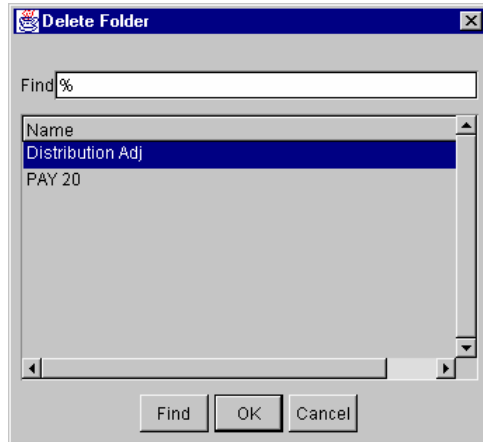
1. Select the Autoquery frequency. Choosing *Always* will automatically run the query each time you open the folder definition.
2. Select *Open as Default* if you want this specific folder definition to open as your default each time you navigate to this folder for the first time after invoking the form.
3. Select *Public* if you want other Oracle Applications users to have access to this folder definition. They can use it as their default folder, but only you can modify it.
4. Choose *OK* when you are finished.



Deleting a Folder Definition

To delete an existing folder definition:

1. Choose Folder → Delete.
2. Select a folder definition from the list that is displayed and choose OK to delete the definition. You can only delete folders you have created. If there are any pending changes to the information in the folder, you will be prompted to commit the changes or cancel.



If other users are referencing that folder definition as their “open as default” folder, that reference is deleted as well.

Recovering the Original Default Folder Definition for a Folder

To recover the original default folder definition for a folder:

1. Choose Folder → Save As when you are in a custom default folder definition. Once you create a custom folder definition and make it the default, you can recover the original default folder definition shipped with the product by performing these steps.
2. Clear Open as Default in the Save As window.
3. Choose OK when you are finished.
4. Navigate to this folder again to display the original default folder definition.

Note: If you like this original default folder definition, give it a name and save it (without making any changes) before you create any new folder definitions. This way, you can open the original folder definition by choosing it from a list of predefined folder definitions.

Querying Records in a Folder

One advantage of a folder is that you can customize it to display only the records you want to see. You can easily define and alter the query criteria for any folder and save that criteria in a folder definition. You can also control the sorting order of the records you display in a multiple-record folder.

To define query criteria for a folder:

1. Run the query you want, either by using Query Find or Query-by-Example. At least one record must be retrieved for the folder to memorize the query.
2. Choose Folder Save As if you want to save this query criteria in a folder definition.
3. Enter a name for the folder definition.
4. Choose *Always* for the Autoquery frequency if you want this query to perform every time you open this folder definition.
5. Choose OK when you are finished.

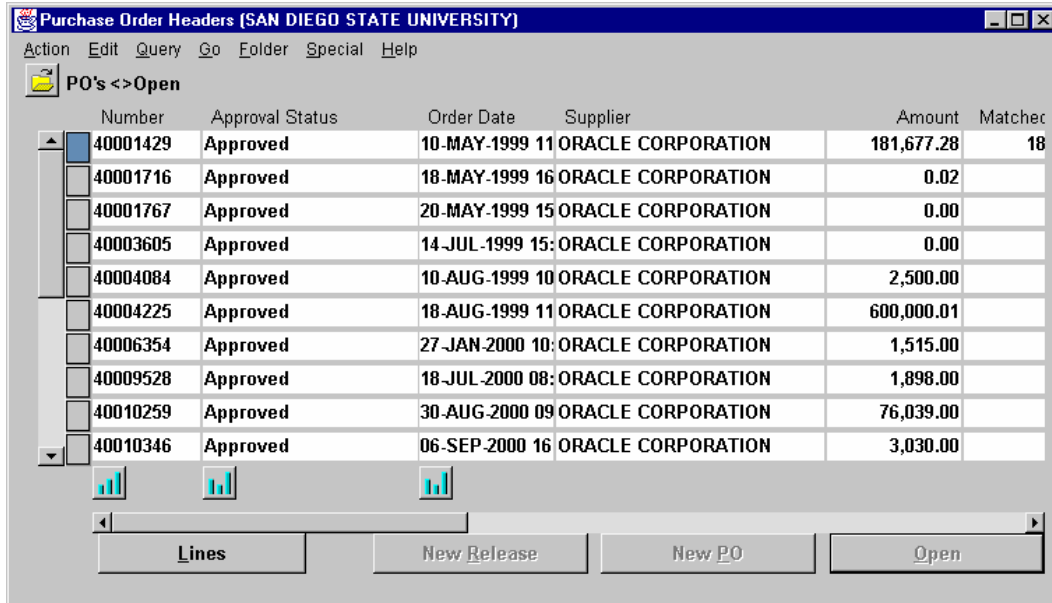
Note: When you save a folder definition, the query criteria gets “locked in” to the folder definition. When you perform another query on that same folder definition, you actually query on the subset of records that could possibly be shown in that block. If you want to perform a new Query-by-Example on the complete set of records, first reset the query for the folder definition before performing another query.

Changing the Query Criteria for a Folder Definition

1. Choose Folder Reset Query, to clear the WHERE clause from the current folder definition. The folder retains the current name and field layout.
2. Perform another query and choose Folder Save to save the new query to your current folder definition.

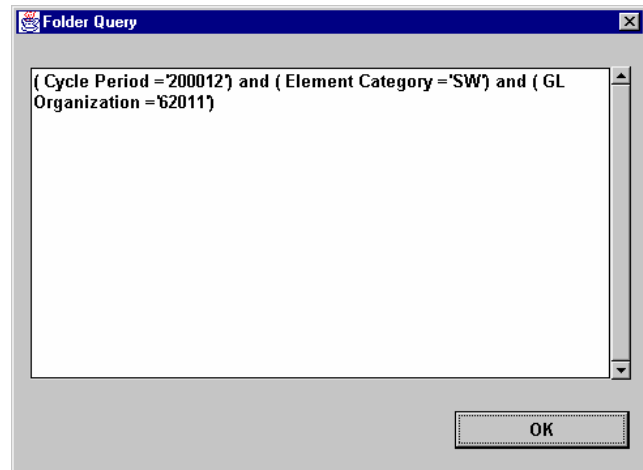
Show Order By

1. To alter the sorting order of data in a multiple-record folder definition, choose **Folder Show Order By**. This menu item acts as a toggle switch to display the **Order By** buttons for the first three fields of a multiple-record folder block. The **Order By** buttons appear beneath those fields that can be changed.



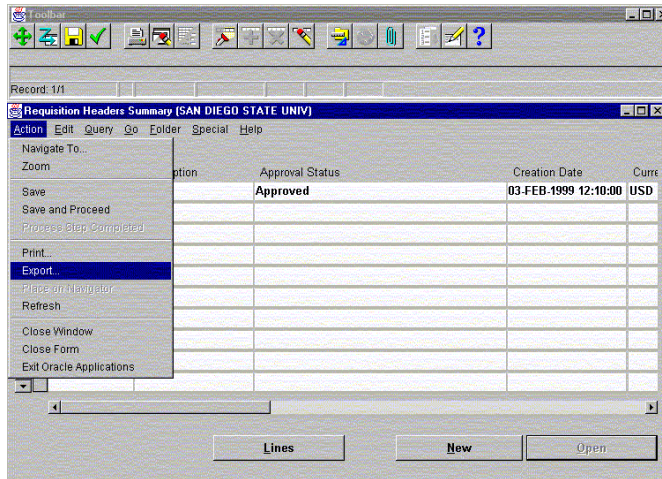
2. Select an **Order By** button to switch it to any one of three settings:
 - Ascending
 - Descending
 - Unsorted
3. Choose **Query Run** to rerun the query in your folder definition to apply any ordering changes to the records.
4. Choose **Folder Save** or **Folder Save As** to save this query criteria to a folder definition. Enter a unique name to identify the folder. Select *Always* for the Autoquery frequency if you want this query to automatically perform whenever you open this folder definition.

You can also choose **Folder View Query** at any time to display the **WHERE** clause for a query in the **Folder Contents** window.

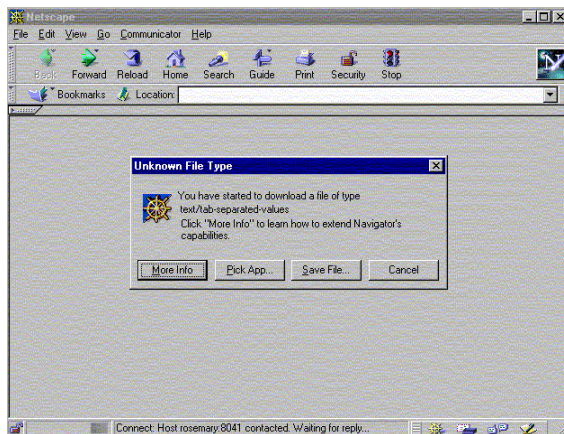


Exporting Folders to Excel

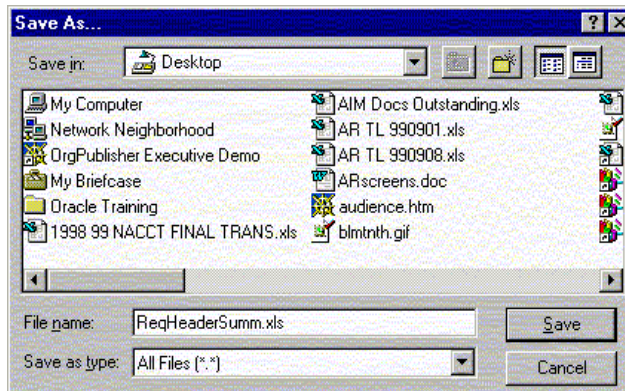
Choose Action Export to save your folder as an Excel spreadsheet.



This will automatically launch your web browser, and a message box will appear. Choose "Save file".



The file must be saved with an ".xls" extension to specify that it is an Excel file.



The file can then be manipulated further within Excel, using commands such as "column hide", "data sort" and "auto filter". The file can also be easily printed from Excel. See the [Excel Helpful Hints](#) document for further information.