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Folders

Introduction

- Oracle's Folder functionality is a means for customizing the presentation of data in multi-record blocks. Not all multi-record blocks use this functionality.

- You can identify when the Folder function is available by the Open Folder icon in the upper left hand corner of the block. In addition, the Folder menu and Folder Tool icon on the Toolbar will be enabled.

- You can use the Folder functions to organize multi-record blocks to display only the fields you need, in the order that you prefer and to sort data. A Folder Block lets you:
  - Modify the width, sequence and prompts of the fields to be displayed.
  - Display records in a specific order.
  - Save customizations for later use.
  - Keep Folder customizations private or make them public for others to access.
  - Make your customizations your default layout.

- Folder Tools functionality is applicable to all folders within AIS applications.

Folder Basics

- Most Summary windows using Folder functionality are accessed using a Find window, but not always.
  - To access a Summary window, you will enter the appropriate search criteria and execute the search by clicking the Find button.
  - Sometimes the Folder Block is displayed without a query.

- You can tell if Folder functionality is available by looking for the **Open Folder** icon located in the upper left corner of the block of records. Other ways to tell if the block uses folder functionality are:
  - An enabled **Folder Menu**.
  - An enabled **Folder Tools icon** on the Toolbar.

Folder Menu

- The Folder menu allows you to perform the following functions.
  - Create, save and delete folder views
  - Show and Hide fields on the window
  - Move fields to different locations
  - Adjust the size of fields
  - Change the name of the field in your folder
  - Sort Data based on the first three columns
  - View and reset the query used to create the folder

Folder Tools Palette

- The Folder Tool Palette is displayed by clicking the Folder Tools icon on the Toolbar or selecting Folder menu/ Folder Tools.
  - This palette provides a simple way to repeatedly perform folder functions that are available on the Folder menu.
  Important: You can position the Folder Tool Palette by clicking and dragging it.This will keep the Palette from becoming hidden behind the window while you are customizing the folder.

Customize Folders - Mouse

- The fields in the folder can be arranged using the Folder Menu and/ or the Folder Tools Palette; however you can also perform some of the field movements with your mouse. This is similar to what you would do using a spreadsheet software, such as MS Excel.

Shrink Field

- By placing your cursor at the edge of the field title, you can click and drag the field edge to *widen* or *shrink* the field size.
    - The cursor shape will change when it is correctly placed to indicate arrows pointing left and right.
    - Hold down the left button on the mouse and drag the cursor to the left or right.
    - The field width is easily adjusted using this technique.

Move Field

- To *move* a field, place your cursor over the field title. The shape will change to two crossed arrows. Then click and drag the field to its new location.

- You can use these two techniques to quickly arrange fields on the window without opening the Folder Tools menu or without using the Folder Tools Palette.

- Another technique to use is to simply place your cursor in the desired field and right-click your mouse; then, select **Folder…** from the list that appears. A sub-menu appears. There are several options from which to choose.

- You can use these two techniques to quickly arrange fields on the window without opening the Folder Tools menu or without using the Folder Tools Palette.

Customize Folders - Folder Tools

- The icons on the Palette duplicate functions from the Folder menu. The Palette provides a simple way to repeatedly perform folder functions that are available on the Folder menu.

Folder Tools Toolbar Icons
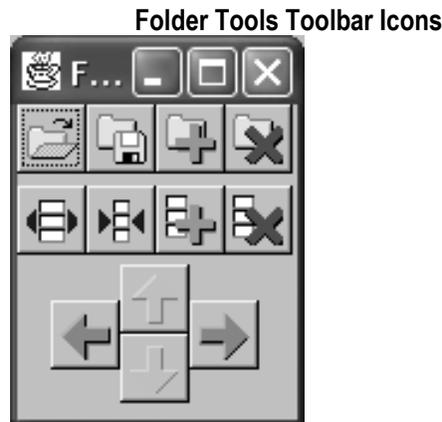
Create **New** Folder

Open Folder

Save Folder

Delete Folder

Show Field

Hide Field

Move Right

Move Left

Widen Field

Shrink Field

Folder Menu Actions

Folder   Special   Help

New...
Open...
Save
Save As...
Delete...

Show Field...
Hide Field

Move Right
Move Left
Move Up
Move Down

Widen Field
Shrink Field
Change Prompt...
Autosize All

Show Order By
View Query...
Reset Query
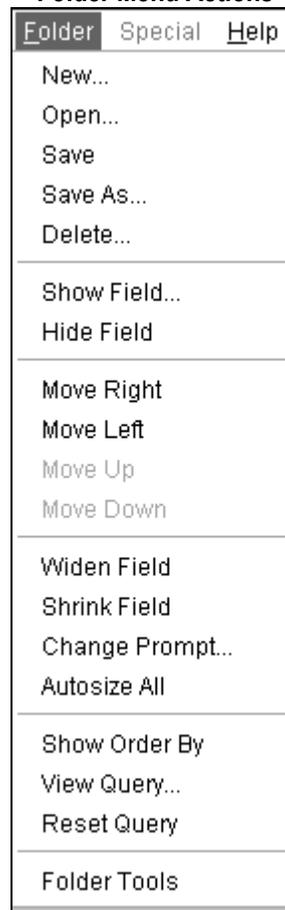
Folder Tools

Using the Folder Tools Palette

- Simple functions performed with the Folder Tools Palette are listed below.

- **Shrink Field** icon is used to adjust the size. Place your cursor in the field to be shrunk and click the Shrink icon.
  – Each time the icon is clicked, the field will shrink a small fraction.
  – Continue clicking the icon until the field is shrunk to the desired width.

- Use the **Move Left** and **Move Right** Arrow icons to relocate a field.
  – Click your cursor in the field to be moved.
  – Click the corresponding button that will move the field in the desired direction.

- Use the **Hide Field** icon to remove a field from the folder.
  – Click your cursor in the field to be hidden and then click the Hide icon on the Folder Tools Palette.
  – Note: Hiding a field only removes it from your window. You are not deleting any data from the database.

- Use the **Show Field** icon to add fields to the folder layout.
  – When you Show a field, it is placed to the right of the field where your cursor is located.
  – Click the Show Field icon to open a list of fields that are available for the layout.
  – To add a field to the folder layout, highlight it and click OK.

Saving and Using Open Folders

Saving a Folder

- Once you've customized the folder, you can choose to save the folder so that it will become your default format.
  – This action will cause the window to open in the default folder format each time you access it.

- Click the **Folder menu** and then select **Save As** to display the **Save Folder** window. This window allows you to name the folder and indicate how it will be used.
  – Enter a unique **Name** for the folder.
  – In the **Autoquery** region, select the Never option.
    - This is recommended, if you are going to use the folder as a default format.
  – Check the **Open as Default** checkbox.
    - **Note:** Selecting Public will allow others to use this folder format also. Only the "Owner" of the Public folder can make changes to it. Public folders are typically created by the Central Business Offices. *It is not recommended that department end-users make their folders Public.*
  – The **Include Query** checkbox is selected by default. Be very careful with the "Include Query" option.
    - Most of the time when you open a folder (block), you will use a Find window to query records first. If you do not uncheck "Include Query" then the search criteria used on the Find window is SAVED with the folder layout that you create. Future queries will be impacted by the query saved with the folder. To avoid this, we recommend that you DELECT the checkbox.
  – Click **OK** to save the folder as your default layout.
  – When the Save As dialogue window closes, you will notice, next to the Open Folder icon in the upper left corner of the folder block, is the name of the folder you just saved.

- To verify or see the queries attached to a folder, click the **Folder** menu and select View Query. Click OK to close the View Query dialogue box.

Open Folders

- There may be a time when you'll want to use another layout. To see the other available layouts, click the Open Folder icon located in the upper left corner of the window.
  – The Open Folder window displays a list of all the folder formats available for you to use.
  – Only folders that you have created or are designated as Public are available.
  – To select a different folder, highlight it and click OK.
    - Opening and using another customized folder does not automatically override your default folder settings. To change the default layout or make a public layout your default, follow the instructions provided above using the Folder menu/ Save As feature.

- You own the folders you create.
  - Take some time to explore these functions by designing folders to help you work more effectively.
  - As you review the AIS eLearning tutorials, you will see how you can use Folders in all Oracle applications.

Sorting Records

Introduction

- Records in a saved Folder layout can be sorted in Ascending or Descending order, using one of the first three columns in the multi-record block.

- The steps outlined below can be used in any of the Oracle applications, where summary information is retrieved and displayed in a multi-record block with Folder Tool capabilities.

Search and Find

- Navigate to the Find window for the respective application.

- Enter the appropriate search criteria and click **Find** to execute the search.

- The records will display in a multi-record block in the Summary window.

Sort Data

Select a Folder

- If you are using a customized folder as the default, then you can use that folder to sort data.
  - Or, you can choose a Public layout for the Folder Block by completing the following steps.
    Click the Open Folder icon.
    Select one of the Folders and click OK.
    The Assets window reappears with the folder name visible in upper-left corner of the block.

- Click on the Folder menu and select **Sort Data**.

- The Sort Data window opens. Use it to set sort options for the **first three** columns in the multi-record block.

- To the right of each field on the Sort Data window is a **Down Arrow**. Click it to display a list of sort options.
  - The default for each is *No Ordering*.
  - Other options are **Ascending** and **Descending.**
  - These options are the same for all three fields.

- Set the options for one or all three fields. *Note:* Sorting occurs from left to right in the multi-record block.

- IMPORTANT: You must **UNCHECK** the **Run Query** checkbox, as you will enter a new query to sort data.

- Click **OK** to close the Sort Data window.

Execute Query

- Now, enter a query.

- Click the **Find** icon on the Toolbar.

- The Find window opens. You will choose to:
  - Query using the previous search criteria. To continue, just click the Find button.
  - Or, click Clear to erase the previous search criteria and enter new search criteria, then click Find.

- The results of the search are displayed in the multi-record block in the order chosen (Ascending or Descending).

- The order can be changed quickly from Ascending to Descending by clicking with the left mouse button on the respective column title.

- You can also sort using the second and third fields. Just click on the field. It will sort first in Ascending order; the second click sorts in Descending order.