



**Work Instruction**

**Foldering**

**(Modify Columns, Query in Enter Journal Screen, and Save as a Folder)**

**Purpose**

Use this procedure to create a custom folder and have the folder run a query to return certain journals.

**Trigger**

You frequently perform the same query and want to display custom screens for that query.

**Navigator Path**

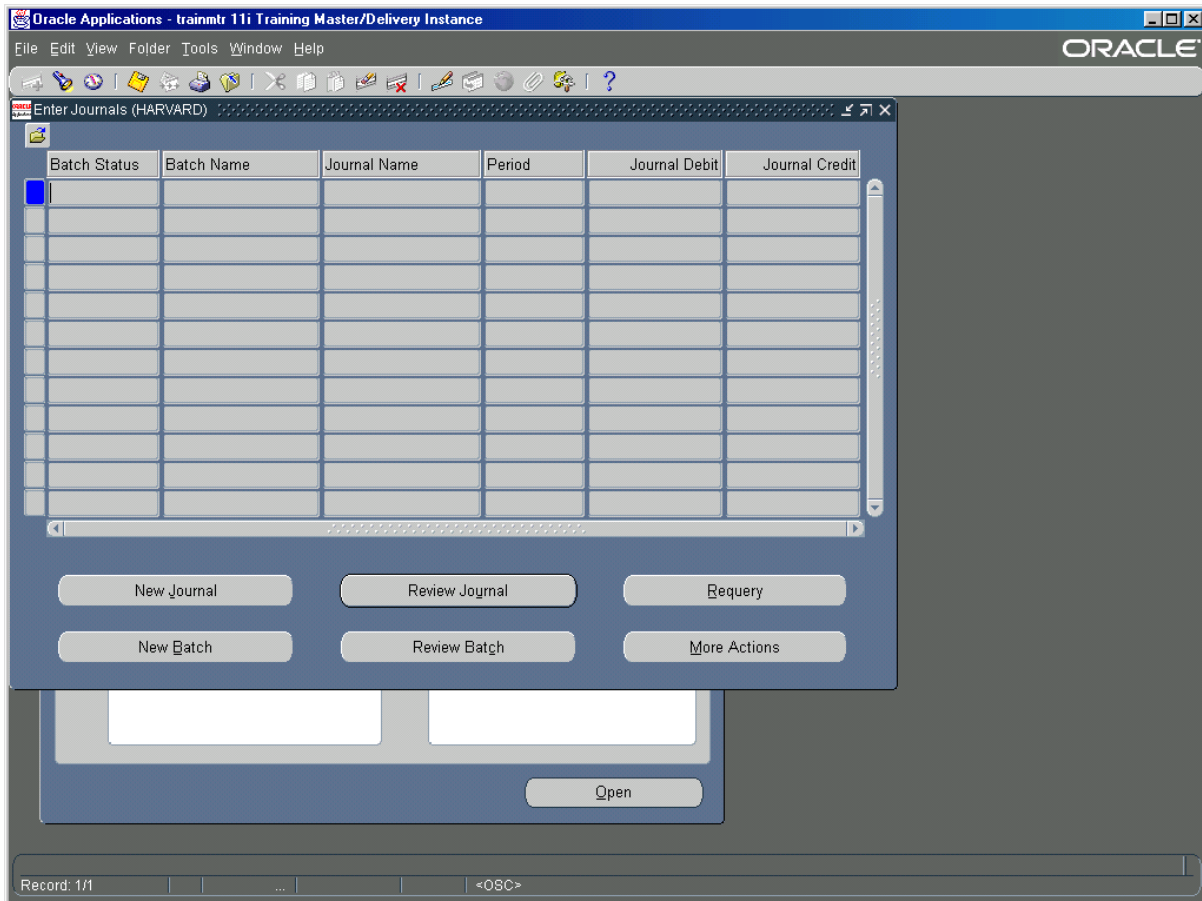
- **Journals → Enter**



## Procedure



1. After opening a previously created folder, close the *Find Journals* screen, leaving the *Enter Journals* screen open.




## Enter Journals



2. Select **Folder** → **Folder Tools**.

3. Perform one of the following:

If You Need To	Then
Widen a column	1. Select the column to widen on the <i>Enter Journals</i> screen 2. Click 
Narrow a column	1. Select the column to narrow on the <i>Enter Journals</i> screen 2. Click 

If You Need To	Then
Show a column	<ol style="list-style-type: none"> <li>1. Select a field in the column to the left of where the column should be added</li> <li>2. Click </li> <li>3. Select the column you want inserted from the list</li> <li>4. Click OK</li> </ol> <p><b>Example:</b> Add Batch Description and Posted Date</p>
Hide a column	<ol style="list-style-type: none"> <li>1. Select the column to remove from the <i>Enter Journals</i> screen.</li> <li>2. Click </li> </ol>
Move a column	<ol style="list-style-type: none"> <li>2. Select the column to move on the <i>Enter Journals</i> screen</li> <li>3. Click </li> </ol>

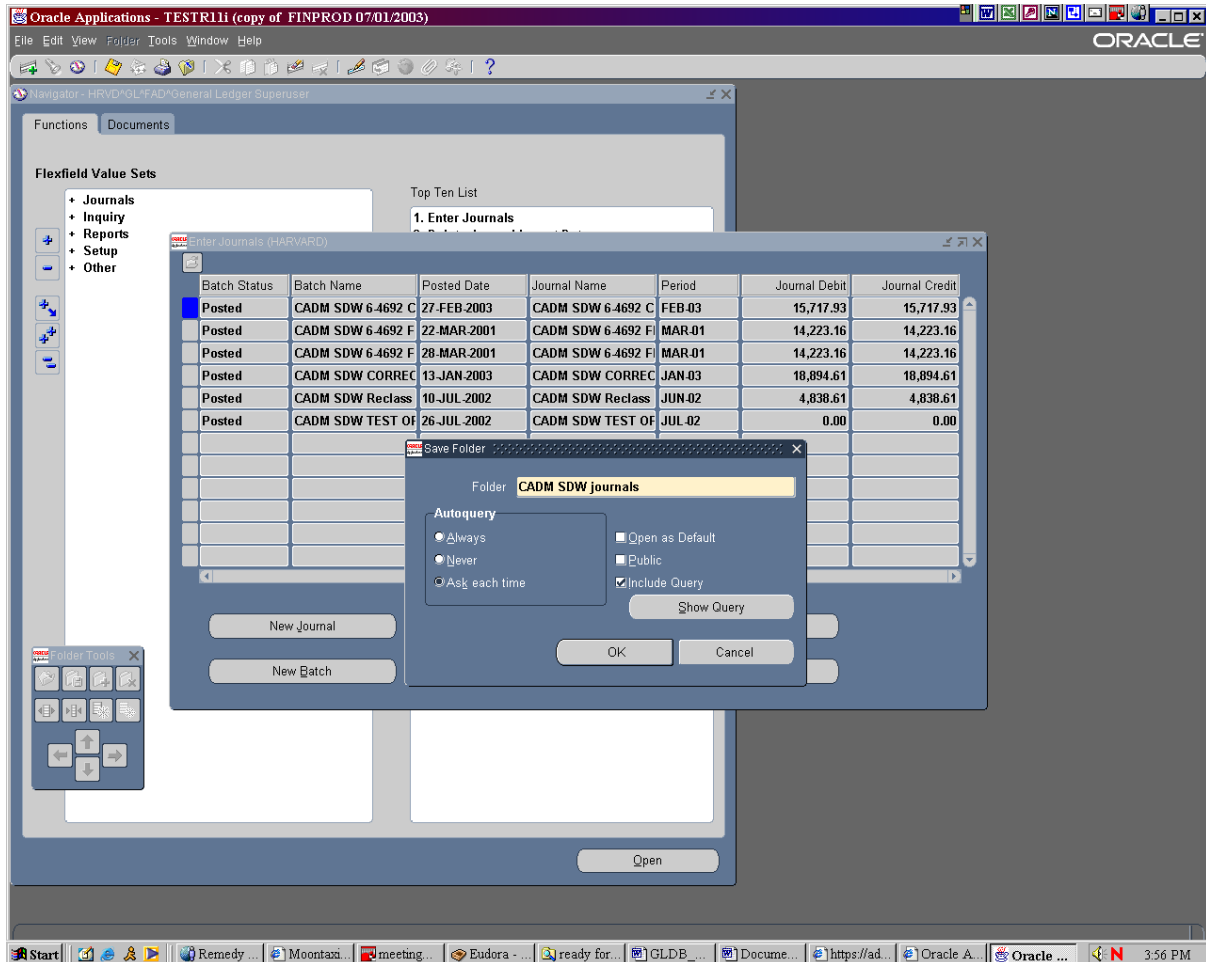
4. If you'd like to enter a query to be saved with the folder press **F7** to go into *enter query* mode.



The status bar at the bottom of the window will display the message "Enter a query; press F8 to execute, Ctrl+Q to cancel."



### Save Folder



8. As required, complete/review the following fields:

Field Name	R/O/C	Description
Folder	R	Custom Folder Name

9. In the pop up window, select the appropriate Autoquery option

- **Always** runs the query each time you open the form and limit the journals returned
- **Never** does not run the specific query when opening the form and returns all journals
- **Ask each time** displays a window asking if the query should be run.



Do not select **Open as Default** as all work instructions are based on the Oracle default folder, and opening as a default can make it more difficult for the help desk to assess any problems. Also, do not select **Public** as this would allow everyone to see your custom folder.

10. Click



### Result

You have successfully modified columns, queried in the *Enter Journals* screen, and saved the results as a custom folder. Select **File** → **Close Form** to exit the Journal form.

### Comments

You have completed this work instruction.