Achieving Customisation with Folder Forms and RXi Reports

By James Hoskins
Aspire Corporation Ltd

Introduction

There comes a point with most software packages where you have learnt the basics of the application and are starting to look at what additional features are available to optimise efficiency. There are many features in Oracle that the end-user can use to achieve the customisation they desire, this report will focus on the two features that will be covered in the presentation – Folder forms and RXI Reports.

Folder Form Customisation

Folder Form Customisation is one of those useful gems that although not hidden as an option, is often left un-used. Particularly where people have not had training on the feature or have not had enough time to divert from their work tasks to discover that these features save time.

Not every form is a folder form, the ones that are, will be distinguishable by its excel like column and row structure and a yellow folder icon visible at the top left of the form. These forms are summary screens which will display many records at a time.

Figure 1 Example of a Folder Form – The Enter Journals screen. Note the yellow folder icon up the top left

Once you have established it is a folder form, there are a number of options available for you to customise the form to suit your needs. Whether you require columns moved around, removed, added, resized or multiple folders created with different purposes, this is easily achieved through either the options under the folder menu or through the folder toolbar icons.
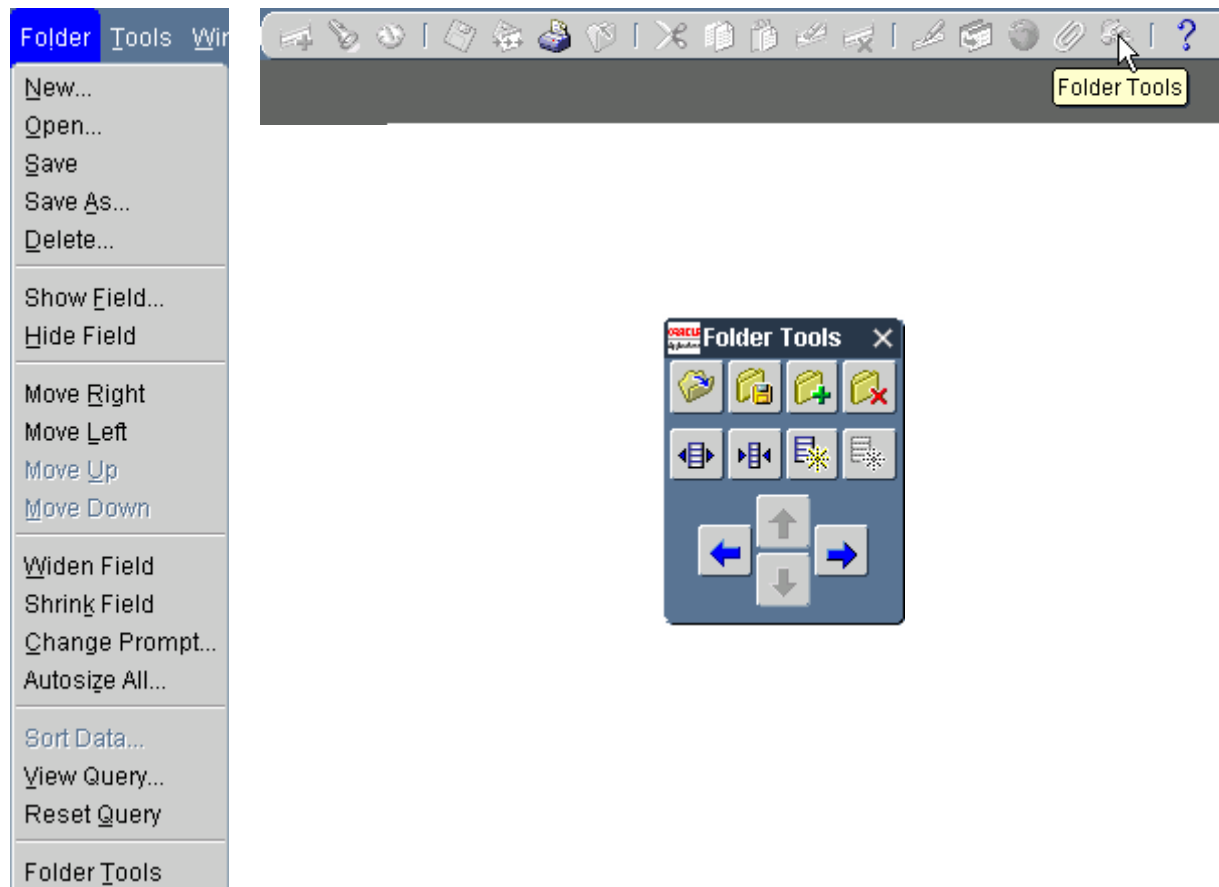
Figure 2-4 (left to right) Folder Menu, Folder Toolbar icon that opens up the Folder tools, Folder tools

Some of the less instinctive options from the menu and toolbar are listed below:

Show Field *There are often other available fields available to view and are accessible through this option*
Hide Field*Just as you may wish to add in additional fields, you may wish to remove less important fields*
Widen Field*This is a resizing option to aid in viewing the field/column more clearly by increasing its width*
Shrink Field*Just as for the widen column, you may wish to resize the field, in this case making it smaller*
Change Prompt *This allows you to change the title of the column/field*
Autosize All *Rather than choosing widen field multiple times on multiple columns, this will do them all at once*
Sort Data *This can ease viewing by sorting the columns alphabetically either ascending or descending*
View Query*If you have saved your folder with a query this will show you the query you created*
Reset Query *You may decide you no longer want just the query results showing, in which case this will reset the folder to show all records.*
Folder Tools *This will bring up the folder tools toolbar as shown in figure four above*

In some folder forms e.g. within the payables responsibility it is particularly useful to know how to customise forms, as there are a large number of fields that appear. With your excel instincts you may naturally discover how to resize and move the columns around to make them easier to manage but many people are unaware that

you can hide less relevant fields and that on some folder forms there will be additional columns that are available for you to show.

Another useful feature is the ability to create multiple folder views. One view for example may be simply the default view saved as original, another saved with a different name with different columns of information showing that are relevant at certain times. You may also have other folders, each with different names and saved with different queries set.

The setting of Queries on a folder form can be particularly useful. Let's say perhaps there is a certain supplier you look up regularly. You may decide to create a folder form with the fields you are interested in and with only 'ABC Suppliers' details showing. Each time you are in this view it will update the search and bring through the latest list of records for that supplier. Unless of course you want the information to stay historical to the time you first set the query, in which case that too can be achieved.

The customisation of folder forms is all about making the views work for you, by saving multiple folders you can switch to the one that is most useful at the time and save yourself from having to search for that same query everyday.

It is also worth noting that there is a useful profile option called 'Folders:Allow Customization' which can be turned on and off if you find that you do not want people to be able to change your saved folders. This will block them from making any adjustments to your folder and will leave it intact for the next time you want to use it.
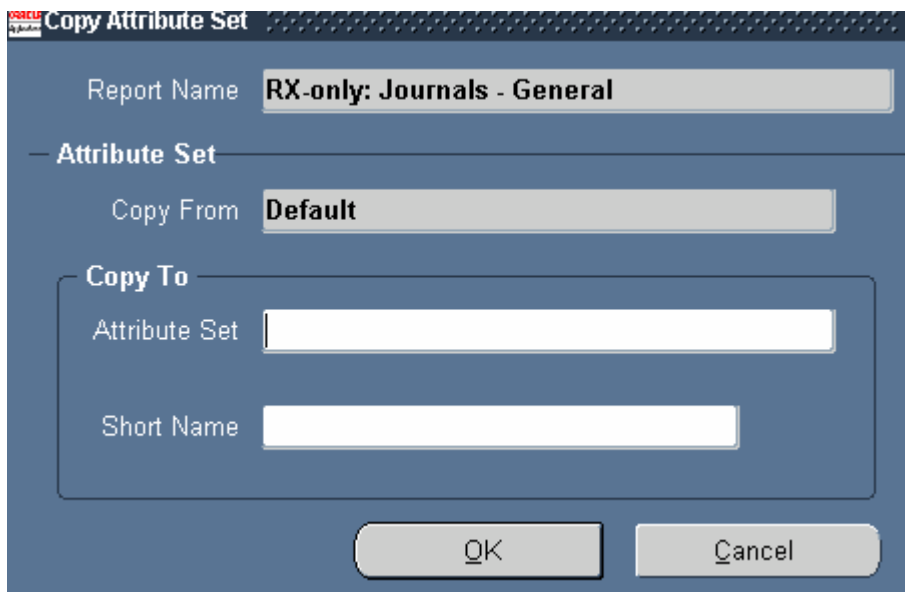
RXi Reports

RXi Reports are a predefined list of reports that are available with certain modules to give you the ability to change the layout of standard reports. They offer you the flexibility to create different layouts and control data items so that you can tailor reports for your own internal use.

You are given the ability to change things such as what columns to include, format options, ordering and grouping, editing report and column headings, page size and other printing options as well as what format you want the report generated in e.g. html, text etc.

Each RXi Report has one or more attribute set connected to it; an attribute set is where the formatting and column information is defined. The attribute set you associate with the RXi report determines the layout and data content of the report.

When you first view your RXi report you will see there is a default attribute set attached to it. These default attribute sets cannot be directly modified so that the standard report will remain intact. In order to make changes, you need to copy an existing attribute set and rename it. You can define as many attribute sets as you want for a report.

Figure 5 Copy attribute screen

One of the useful features you can create on your reports is a summary total. When adding these to your report you have the choice of summing or counting your records. Counting is available on text and number fields whereas summing is only available on number fields. Options are available to add these for each page, as a running total, for the previous page and for the report total. If you have added grouping levels you may also see options available to total for example at the end of each batch if you had grouped by batch. From the Column details screen you will see the display option check boxes but further breakdowns for the grouping are available by selecting either the sum details button or the count details button when clicked on the row you wish to adjust.
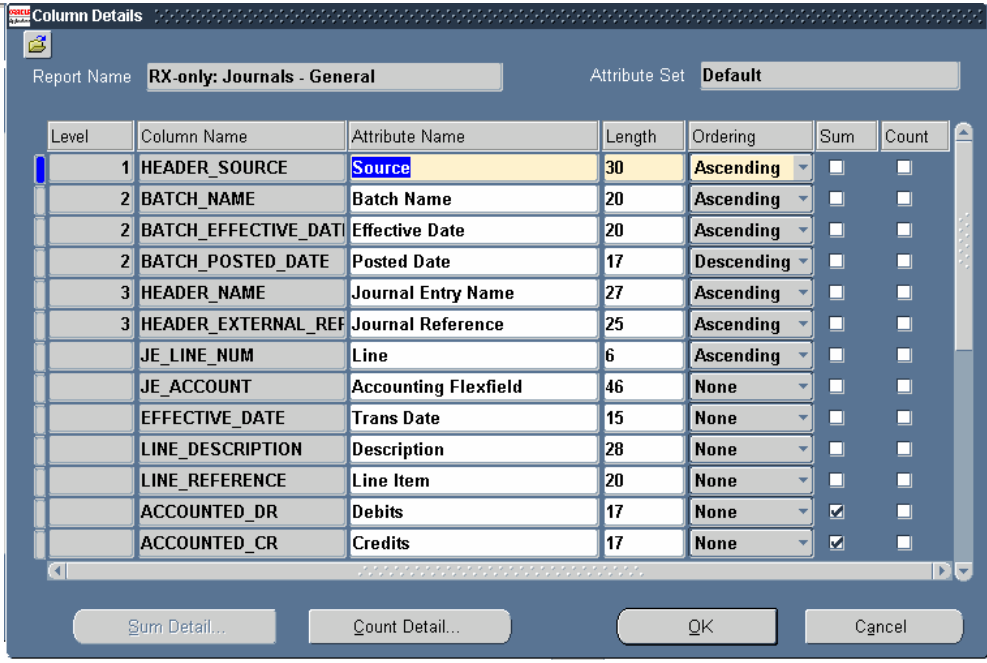
Figure 6 Column Details Screen – note the sum and count check boxes

RXi reports are not difficult to use, just as with the folder forms, it is mainly a case of knowing what is available and where to find them. There are also a few traps to be aware of when working with RXi Reports. For example within the printing options you have a setting for page width and page height. These options have no default value and if no value is put into page width, it will print as one line, set with no wrapping and page height will print one page only unless adjusted.

Figure 7 Page Setup Tab – note the Page width and height sections

Report Title *The name that appears at the top of the first page*
Group Display Type *This will list your headings you selected in the displayed columns tab as the higher levels either below or beside each other*
Page Width and Height *Adjusts the page width and height by characters*
Title *Displays the Report title you set in the upper part of this screen tab*
Organization Name *Displays the Multi-org Organisation at the top of each page*
Page Number *lists the page number, this works in conjunction with the Total Pages option to create page x of x*
Parameters *When you ran your report you filled in some parameters eg start date and end date whichever details you filled in will appear if this option is selected*
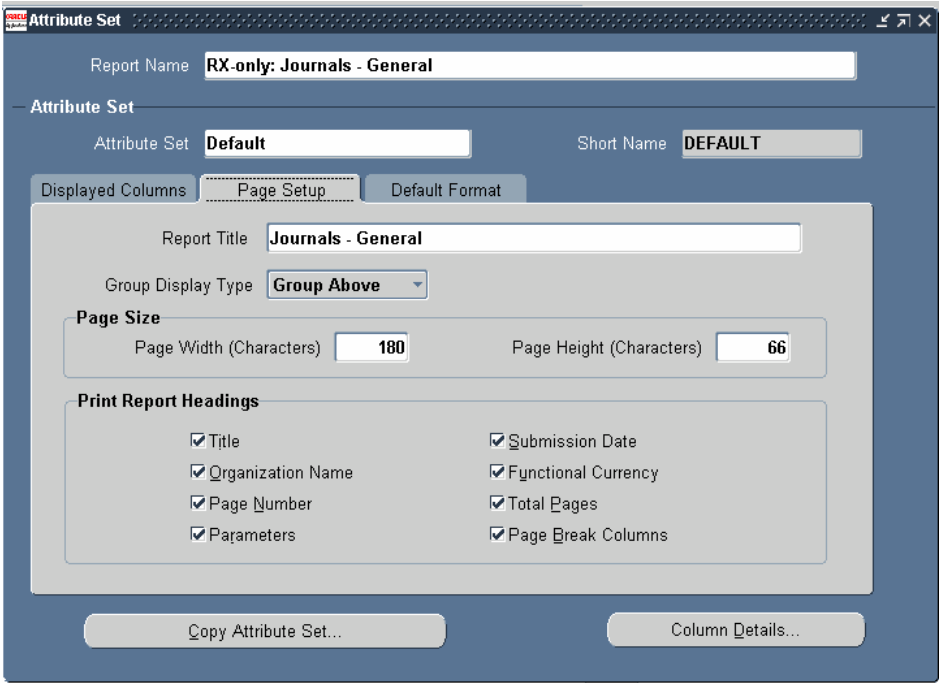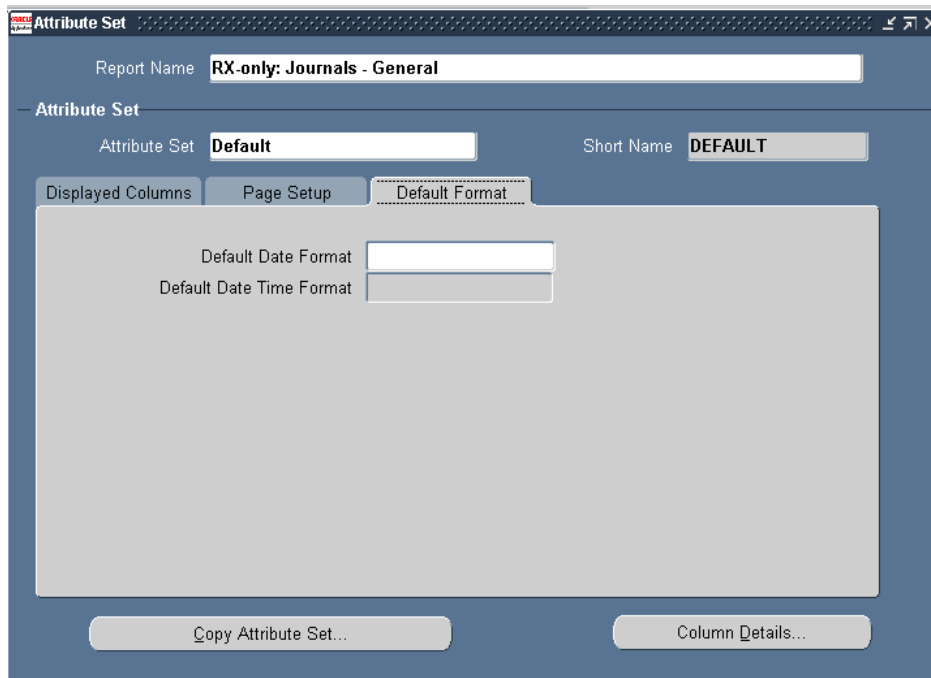**Submission Date** *The date the report was run/submitted*
Functional Currency *The currency the report is run on*
Total Pages *See Page Number description above*
Page Break Columns *Showing the headings you selected in your displayed columns groupings*

Also in selecting items such as columns, be aware that you are not only choosing columns, you are also selecting the columns in the order they will appear in your report. By fully comprehending all of these settings, you will be able to manage your reports more effectively and retrieve the information you need more efficiently.

Figure 8 Display columns tab

The groupings that are selected in the Displayed Columns tab impact on the layout at the top of your report. For example in the screen picture above the report would be grouped by Source then by the level 2's and then the level 3's eg

Source
       Batch Name Effective Date Posted Date
               Journal Entry Name Journal Reference
                      Line Accounting Flexfield TransDate Desc Line Item

       Batch Name Effective Date Posted Date
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It is important to note that the display of these records will be impacted by other factors such as the group above or group left options. The previous example is closer to a group left format. During the session the handouts will give further examples of the different layouts.

Figure 9 Default Format tab

The Default format tab allows you to adjust the formatting of any date or time fields that appear on your report. When adjusting these settings you need to use the standard DD/MM/YY structures to create the desired format.

Conclusion

This report should hopefully provide you with a general overview of the possibilities that Folder Forms and RXi's can offer your organisation. From the presentation I hope you will then come out with some practical ideas of how to implement these features after I have demonstrated how to put these concepts into practice. I intend to show you step by step how to use both these features efficiently.

My aim for showing you these features is to get you exploring parts of Oracle that you may not have ventured into. Being able to access the information we need in the way we need it can only increase the worth of Oracle to our Organisation.

About the Author

James Hoskins BCom CA has specialised in Oracle Financials Training and Documentation for the last six years. He is an OCP for the Financials procurement track.