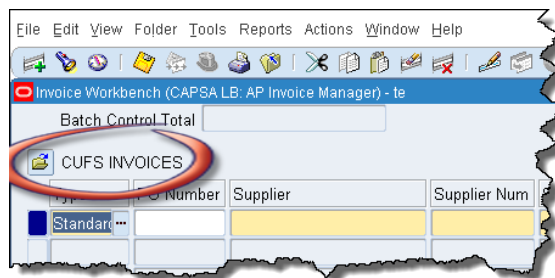


# Folder Tools

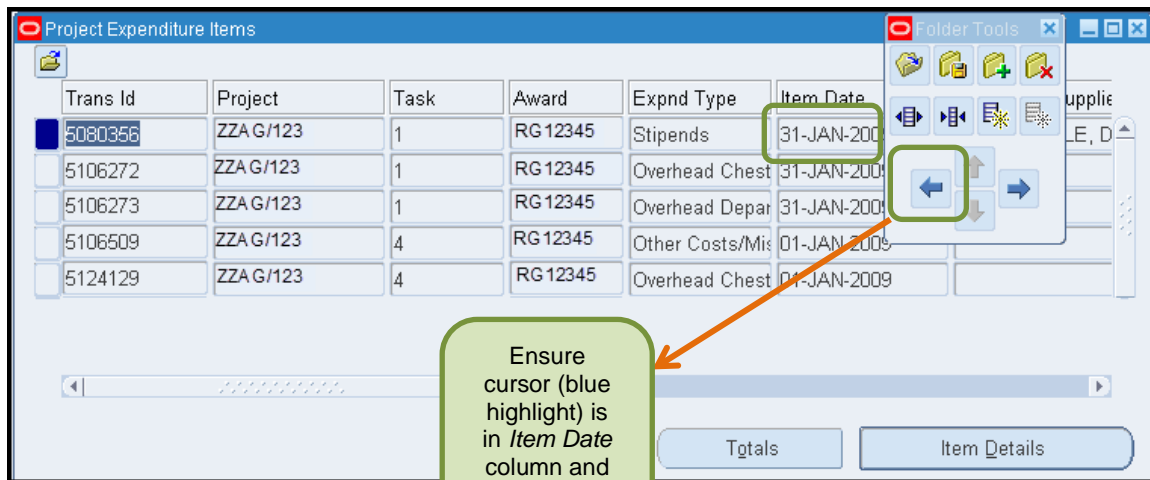
Folder Tools enable you to customise/personalise the way the forms look on the screen, and are available when the folder icon or folder menu appears on any of the CUFS module screens. The folder is specific and unique to the user who designed it and the form it relates to.

The University has set up some default folders that will automatically display when a user is on that screen. Below is an example of a folder tool that has been set as standard when processing an AP invoice (CUFS INVOICES).

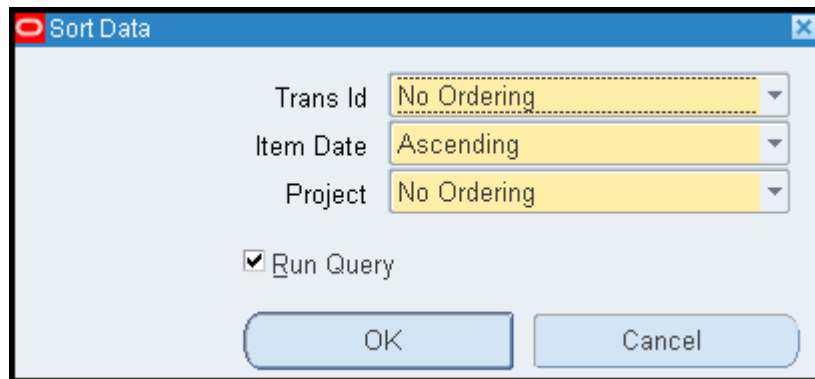


## Creating a custom folder

1. Click on the *folder tools* icon in the tool bar and move the item date column to the far left.



2. Click on the *Folder* menu and select *Sort Data* from the list. Data can be ordered Ascending or Descending, leave Trans ID and Project as No Ordering and click **OK**.

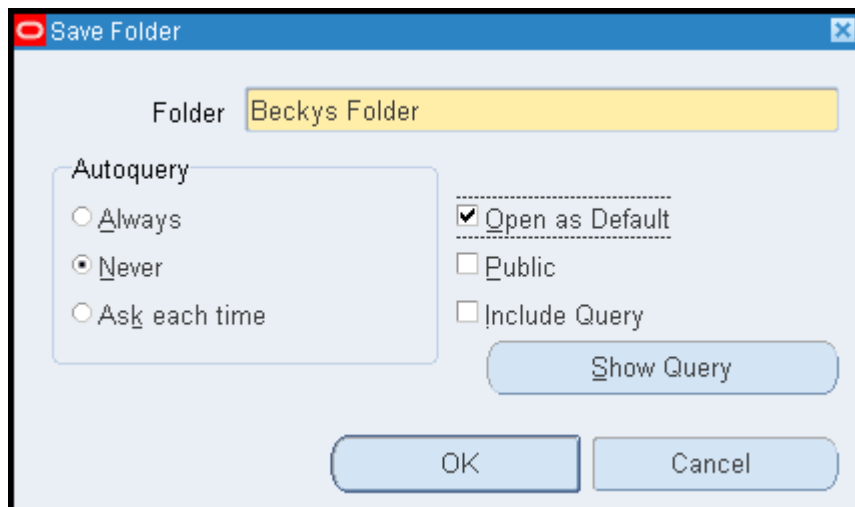


### Saving a custom folder

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3. If you wish to save your folder, click on the *Folder* menu in the *Tool Bar* and select *Save as* from the list. You **MUST** always have *Autoquery* checked as **Never**, and **UNCHECK** both the ***Include Query*** and ***Public*** boxes.

**NB:** If the ***Public*** box is checked, the folder will be visible to all CUPS users, and if ***Open as Default*** is checked as well, your folder will be the default for **ALL** users!



4. To print the screen or export the data to Excel, click on the ***File*** menu and select ***Print*** or ***Export***. (Please note that in order to export you may need to do some preliminary set up on your PC. Please refer to the UFS web page for advice. The Export function is not available to Mac users).

*Please Note: Expenditure Items for closed projects can be viewed in the screen.*