## 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).

Eile Edit )	√iew Folder <u>T</u> oo	Is Reports Action	is <u>W</u> indow	Help 5	
(📫 🏷 🤅	D   🤌 🎄 🚳	) 崎 🖗 🖗	0 🛍 🚧	🙀 i 🦽 🕼 🗲	
O Invoice V	Vorkbench (CAPSA	LB: AP Invoice Mar	nager) - te		
Batch Control Total					
	Numbe	r Supplier		Supplier Num 🏉	
Stand	art •••				

## 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.

<sup>o</sup> roject Expendit	ture Items				🖸 Folder Tools 🛛 🗖 🗖
3					🔗 💪 🕰 🔍
Trans Id	Project	Task	Award	Expnd Type	
5080356	ZZA G/123	1	RG12345	Stipends 31-JAN-20	
5106272	ZZA G/123	1	RG 12345	Overhead Chest 31-JAN-20	
5106273	ZZA G/123	1	RG12345	Overhead Depar 31-JAN-20	
5106509	ZZA G/123	4	RG12345	Other Costs/Mis 01-JAN 20	
5124129	ZZA G/123	4	RG12345	Overhead Chest D1-JAN-20	09
Ensure cursor (blue highlight) is in <i>Item Date</i> column and click on the		Tgtals	► Item <u>D</u> etails		
			move left button		

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*.

으 Sort Data 💦			×
	Trans Id	No Ordering	•
	ltem Date	Ascending	•
	Project	No Ordering	•
Run Query			
	OK Cancel		

## Saving a custom folder

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 visible to all CUFS users, and if **Open as Default** is checked as well, your folder will be the default for **ALL** users!

O Save Folder	×
Folder Beckys Folder	
Autoquery	
⊖Always	☑ Open as Default
⊙ Never	<u>Public</u>
⊖ As <u>k</u> each time	Include Query
	Show Query
	OK Cancel

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.