Setting up Shortcuts in CUFS

Setting up Favorites from the E-Business Suite Homepage

Favourites enables you to create a list of most commonly used tasks, without the need to drill down on a particular responsibility. The following steps guide you through how to set up Favourites.

1. From the E-Business Suite home page, click on **Personalize** in the **Favourites** section of the screen.

2. Click on the **Responsibility** drop down list to select the relevant responsibility and click on the **Go** button.

3. The tasks for the selected responsibility will display. **Tick** the boxes adjacent to the tasks that you want to add to your Favourites list and click on the **Add** button.

4. The selected tasks will display at the bottom of the screen in the ***Selected to Display*** section.

TIP: If you have responsibilities for different departments you can change the name of the favourite at this point to make it easier to identify
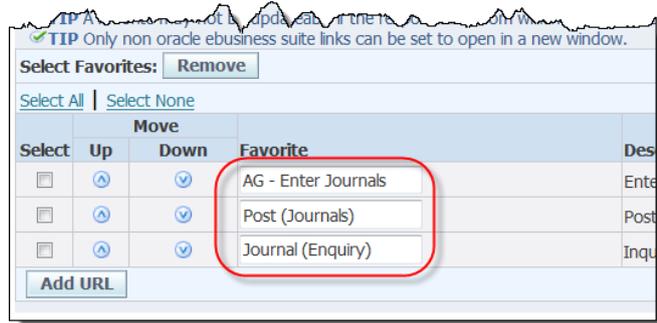
5. Click on **Apply** to save the changes.
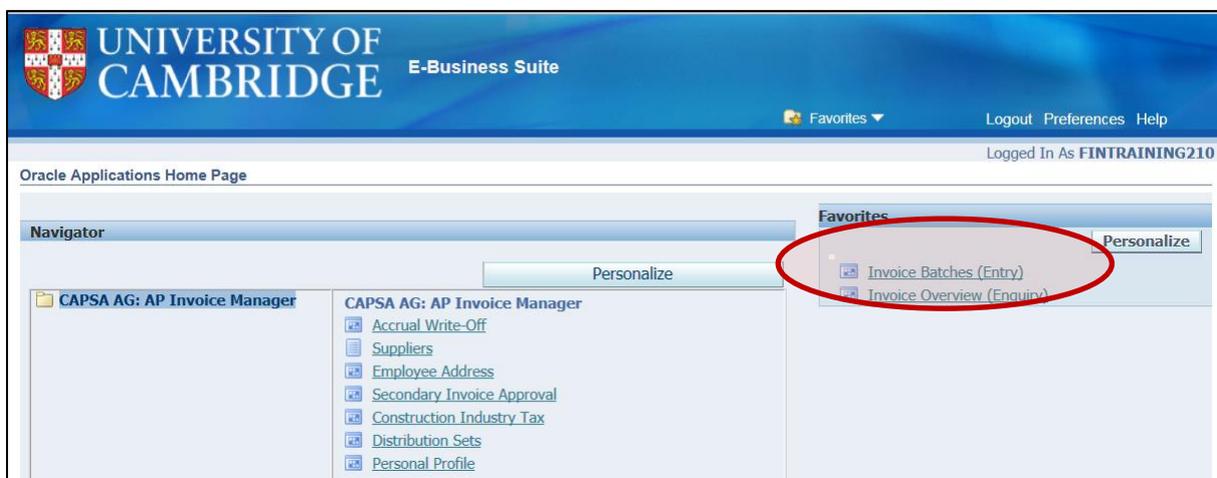
6. Your E-Business Suite home page will display with links to your Favourite tasks at the right hand side.

Setting up a Top Ten List from the Navigator

To save searching for frequently used tasks, you can set up a Top Ten list for each responsibility you have.

To add a task to the *Top Ten List*, highlight the task and click on the forward arrow button.

To remove a task, highlight the relevant line and click on the back arrow button

NB: The name of some of the tasks that you select to display in your *Top Ten List* may change but it's the same task.

Double click on the task to open it. The tasks open in what is known as a form in UFS.

The *Top Ten List* is similar to *Favorites* as it contains shortcuts through to tasks that you carry out on a regular basis. The main difference is that with the *Top Ten List* you must select the responsibility in the navigator for the list to appear.
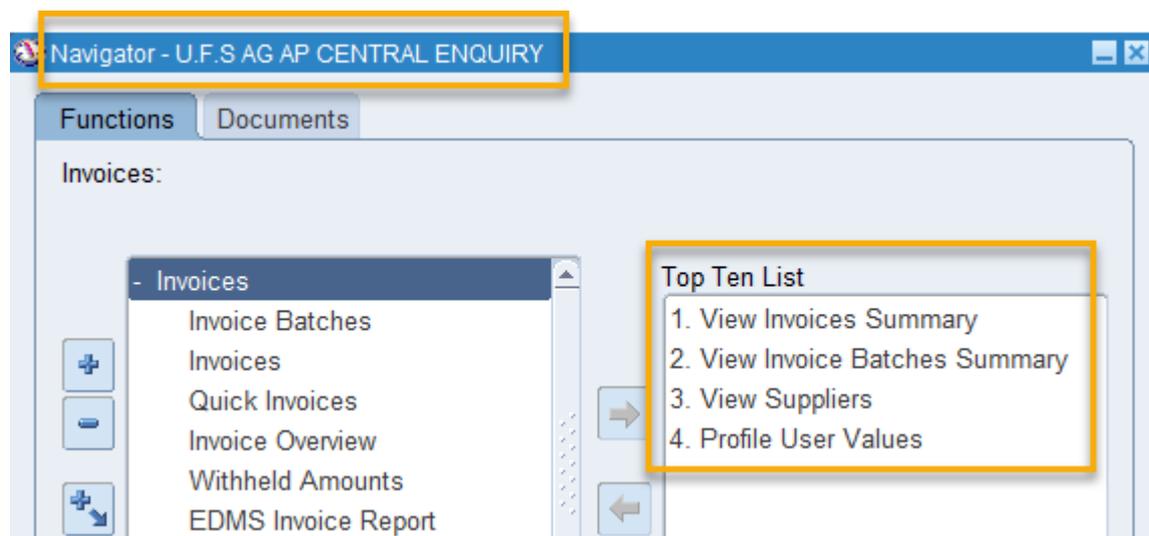
On the E-Business Suite Homepage, *Favorites* can be from a mix of responsibilities and allow you to bypass the navigator and take you straight into the task.

Personal Profiles

Personal profiles allow you to change defaults within the system. They are user specific and contain information entered by the user who has signed onto the system. You may find them useful to set up a default printer or an account code for iProcurement ordering.

.
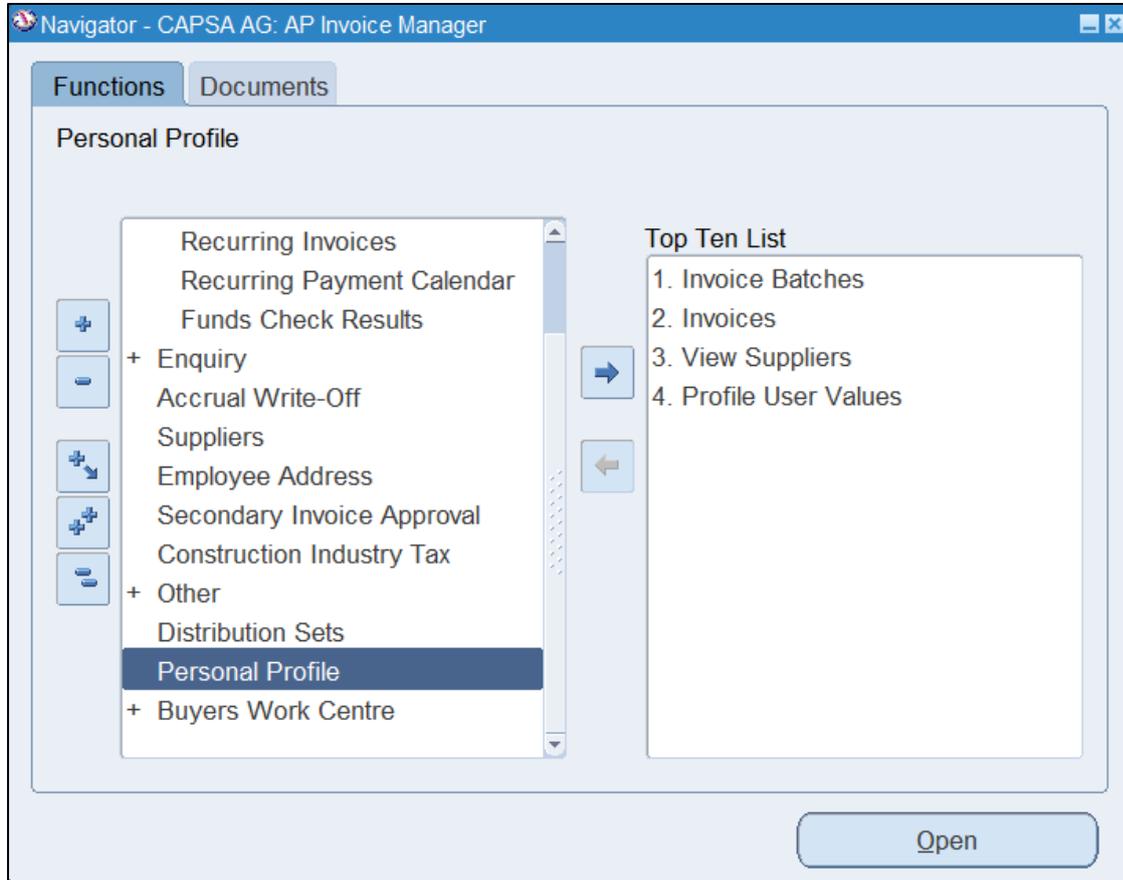
1. Navigate to **Personal Profile** either from your task list on E Business Suite Home page or from Navigator once you have selected a task. A blank screen will appear.

2. Press **F11** on your keyboard or using the view menu select *Query by Example then Enter* to put the screen into query mode, the first line should go blue.
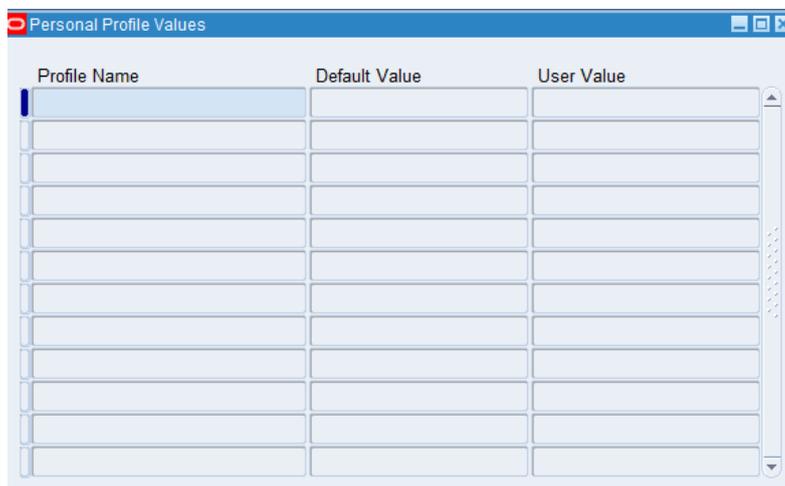
Setting default GL account codes and contact details to print out on orders

Enter CAPSA% in the Profile Name field and then press **ctrl + F11** or using View from the menu, select *Query by Example then Run*.
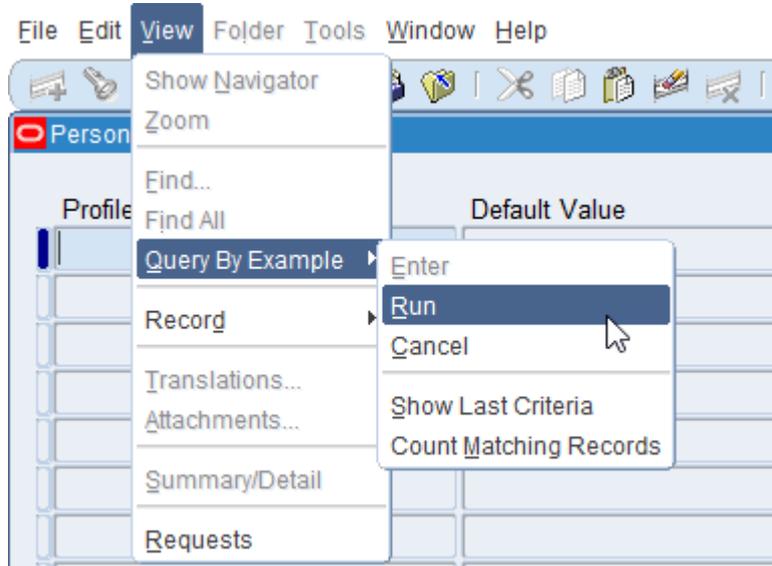
This displays the options where you can default in the following fields:

a. **CAPSA GL…** profile names (five in all) can be changed by clicking in the User Value field for the relevant profile name. Enter your own relevant account code segments. Useful within iProcurement.

b. **CAPSA PO…** profile names relate specifically to Purchase Orders. You can enter your fax and telephone number by clicking in the user value and these will print at the top of your purchase order.

Profile Name	Default Value	User Value
CAPSA GL Cost Centre Default		
CAPSA GL Department Default		
CAPSA GL Entity Default	U	
CAPSA GL Source of Funds Defa		
CAPSA PO Email Address		john.smith@cam.ac.uk
CAPSA PO Fax No.		01223456789
CAPSA PO Queries		
CAPSA PO Telephone No.		01223765432
CAPSA WPM Delivery Finance C	U.AG.AGBA.GAAA.LAAA.(	
CAPSA: Allow WF Creation of PO	Yes	

Default printer and number of copies

Press **F11** on your keyboard to put the screen back into query mode and this time type in CONCURRENT% and press **ctrl F11** and you can default in the following.

Profile Name	Default Value	User Value
Concurrent: Allow Debugging	Yes	
Concurrent: Business Intelligence	No	
Concurrent: Client Filename Char		
Concurrent: Enable Request Subn	Yes	
Concurrent: Force Local Output F	Yes	
Concurrent: Show Requests Summ	Yes	
Concurrent: UTL_FILE flush delay		
Concurrent:Attach URL	Yes	
Concurrent:Collect Request Statis		
Concurrent:Conflicts Domain		
Concurrent:Date Parameter Incre	Start Date	
Concurrent:Hold Requests	No	

Concurrent Report Copies profile name allows you to change the number of copies set to come off the printer, without having to keep changing it in the request screens.

   a. Click into the *User Value* field

   b. Enter 1 in the field if you mostly raise purchase orders or sales invoices. If you are running a lot of reports then enter 0 in field so that it prints to screen first for you to view and then you can reprint if required.

   c. Save

If you use the system mostly for running reports / checking account balances then it is advisable to leave the Concurrent:Report Copies profile as zero. This is because some reports consist of many pages and you may want to check their suitability before you print.

Press **F11** on your keyboard to put the screen back into query mode and this time type in PRINTER % and press **ctrl F11**.

Printer profile name allows you to set your own printer name in the User Value column by clicking in the user value field and use the list of values to select required printer. Not all printers are compatible with UFS so you may need to check with your computer office

Profile Name	Default Value	User Value
Printer	noprint	

Save your changes to update your personal profile.