Customising the Expenditure Enquiry Screen

To scroll to the bottom of the list quickly, click on the *View* menu and select *Record, Last*. Scroll back to the top using *View, Record, First*.
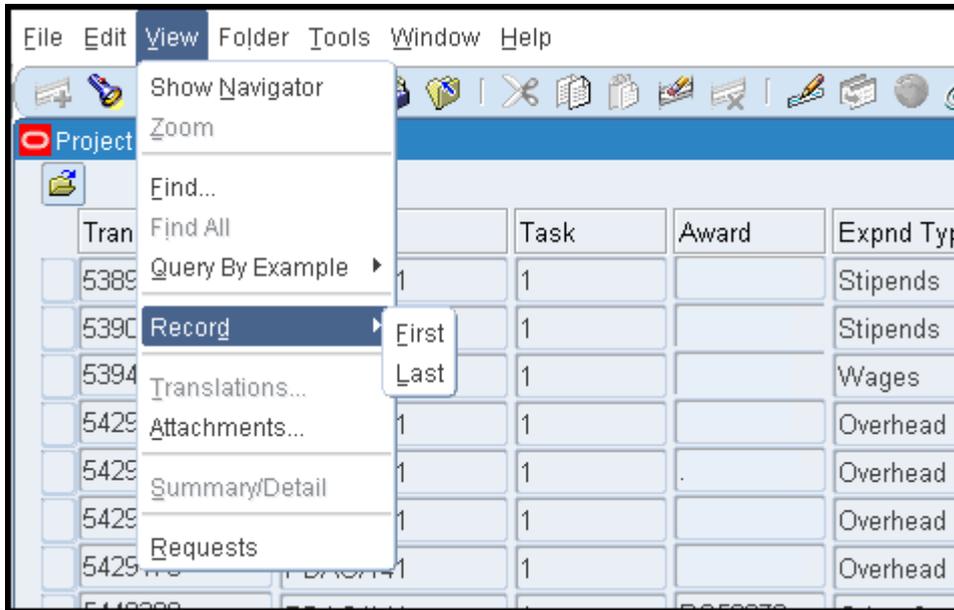
Data in the screen is automatically ordered by the Transaction ID which is assigned when the transaction is imported into the Grants module, rather than by the Item Date. If you would prefer the data to be ordered by item date, use folder tools to create your own folder view.

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

Ensure cursor (blue highlight) is in *Item Date* column and click on the move left button
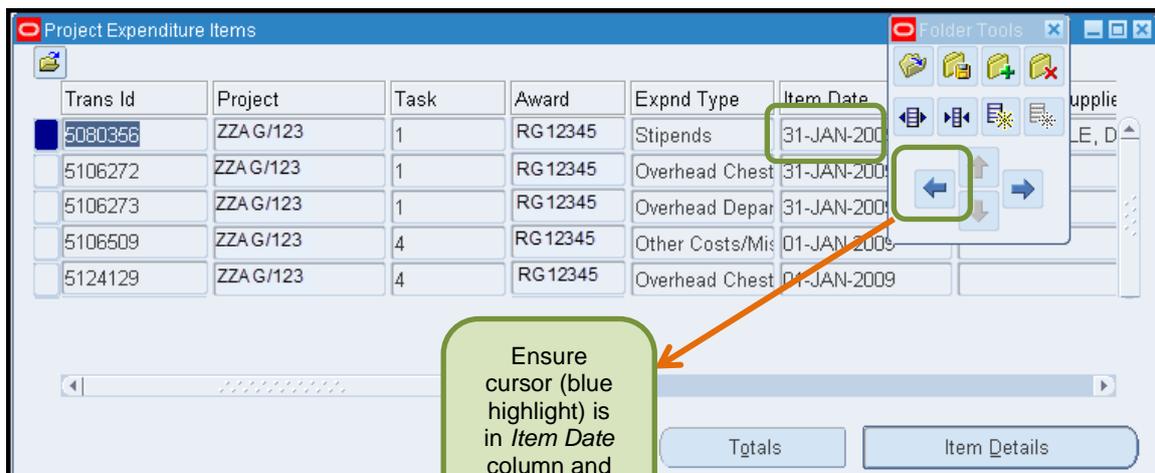
2. Click on the *Folder* menu and select *Sort Data* from the list. Data can be ordered Ascending or Descending, leave Trans ID and Project as No Ordering and click *OK.*
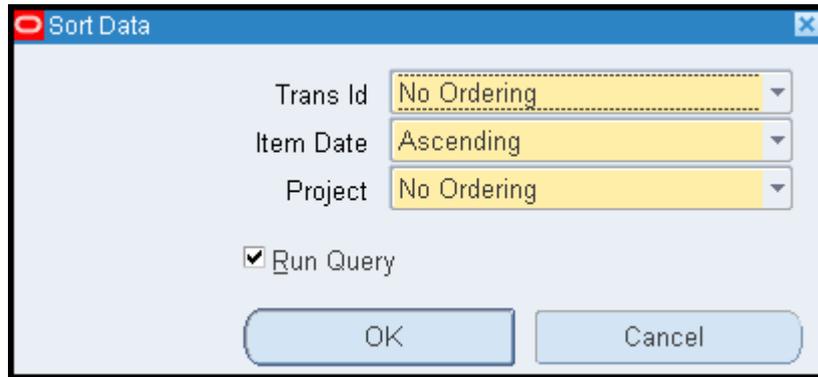
3. If you wish to save your folder, click on the *Folder* menu in the *Tool Bar* and select *Save as* from the list. You **MUST** always have *Autoquery* checked as *Never*, and **UNCHECK** both the *Include Query* and *Public* boxes.

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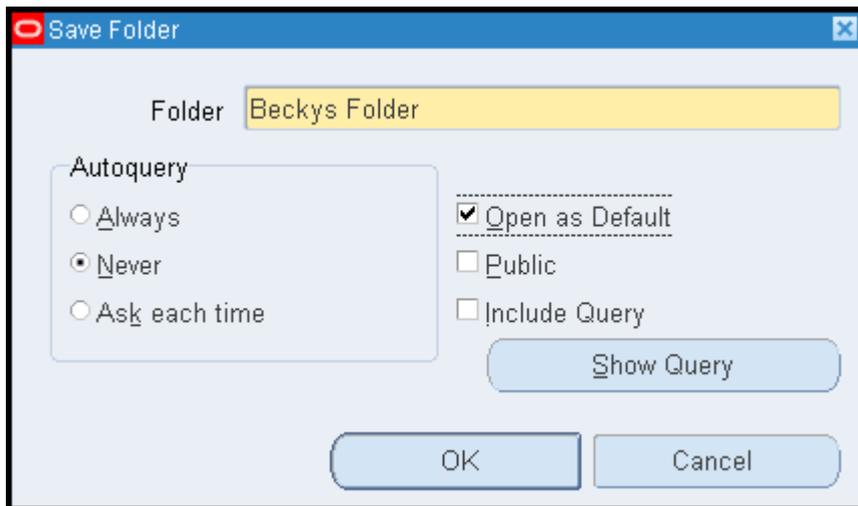
4. To print the screen or export the data to Excel, click on the *File* menu and select *Print* or *Export*. (Please note that in order to export you may need to do some preliminary set up on your PC. Please refer to the UFS web page for advice. The Export function is not available to Mac users).

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