

## **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.

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	) Tran	<u>F</u> ind Find All			Task	Award	Expnd Typ
	5389	Query By Exampl	le 🕨	1	][1		Stipends
	5390	Recor <u>d</u>	•	Eirst	][1	][	Stipends
	5394	Translations		Last	1	]	Wages
	5429	Attachments	1	][1		Overhead (	
	5429	Summary/Detail		1	1	].	Overhead [
	5429		1	1		Overhead (	
	5429	Requests		-h	1		Overhead [
	F 1 10	200					

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.

)				❷
Trans Id	Project	Task	Award	Expnd Type
5080356	ZZA G/123	1	RG12345	Stipends 31-JAN-200
5106272	ZZA G/123	1	RG12345	Overhead Chest 31-JAN-200
5106273	ZZA G/123	1	RG12345	Overhead Depar 31-JAN-200
5106509	ZZA G/123	4	RG12345	Other Costs/Mis 01-JAN 2009-
5124129	ZZA G/123	4	RG12345	Overhead Chest D4-JAN-2009
(4)	2000000000		Ensure cursor (blue highlight) is in <i>Item Date</i> column and	T <u>o</u> tals Item <u>D</u> etails

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*.

🗢 Sort Data				×		
	Trans Id	No Ordering	-			
	ltem Date	Ascending				
	Project	No Ordering	-			
	<b>⊠</b> <u>R</u> un Query	<b>⊠</b> <u>R</u> un Query				
	01	OK Cancel				

 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
⊙ <u>N</u> ever	□ <u>P</u> ublic
⊖ As <u>k</u> each time	Include Query
	Show Query
	OK Cancel

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.