



Customising the Expenditure Enquiry Screen

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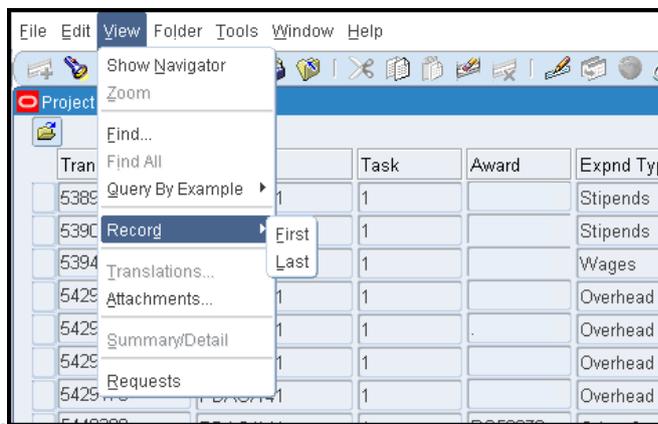
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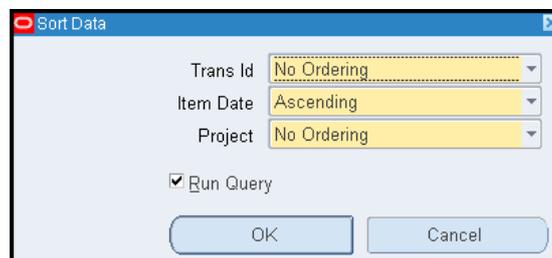
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To scroll to the bottom of the list quickly, click on the **View** menu and select **Record, Last**. Scroll back to the top using **View, Record, First**.



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, put your cursor on the first/top date in the **Item date** column, and double click. The dates are then sorted in **Descending** order. Double click to sort **Ascending** again. Alternatively, open the **Folder** menu, and use **Sort Data**.

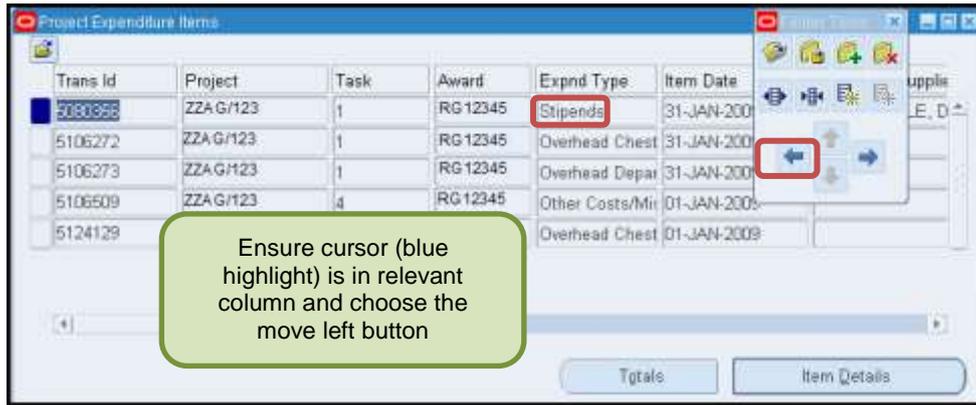
Click on the **Folder** menu and select **Sort Data** from the list. Data can be ordered **Ascending** or **Descending**, leave other columns as **No Ordering** and click **OK**.



Only the first 3 columns of the **Expenditure Inquiry** can be sorted. If you want to sort on another column, you will need to use **Tools** to move the column to the left, until it is one of the first 3.

Select the **folder tools** icon in the tool bar and move the relevant column to the left, until it is one of the first three columns.



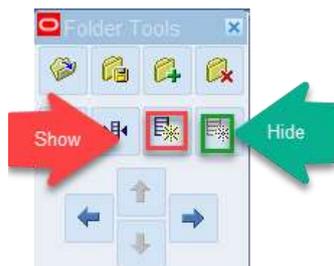


To save time in future, create your own **Folder view**: Select the **Folder** menu in the Tool Bar and select **Save As...** from the list. You **MUST** always have **Autoquery** checked as **Never**, and **UNCHECK** both the **Include Query** and **Public** boxes.

NB: If the **Public** box is checked, the folder will visible to all CUFS users. NEVER tick **Open as Default**, your folder becomes the default for **ALL** users!

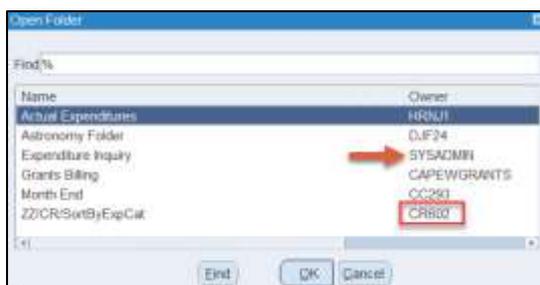


Apart from moving them, columns can also be hidden or shown using the **Folder Tools** icon in the Tool bar.



There are many fields that are hidden in the default folder/template option. If you need any of them, select from list.

To revert to the default template, from the **Folder** menu on the tool bar, select the folder that has **SYSADMIN** as the **Owner**. You will see that any folders you have saved are displayed with your CRSID (CUFS username).



To export the data to Excel, click on the **File** menu and select **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). You can also use **Print**.