HOW TO:

# Navigate COINS OA

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# Contents

# 1 Logging into COINS

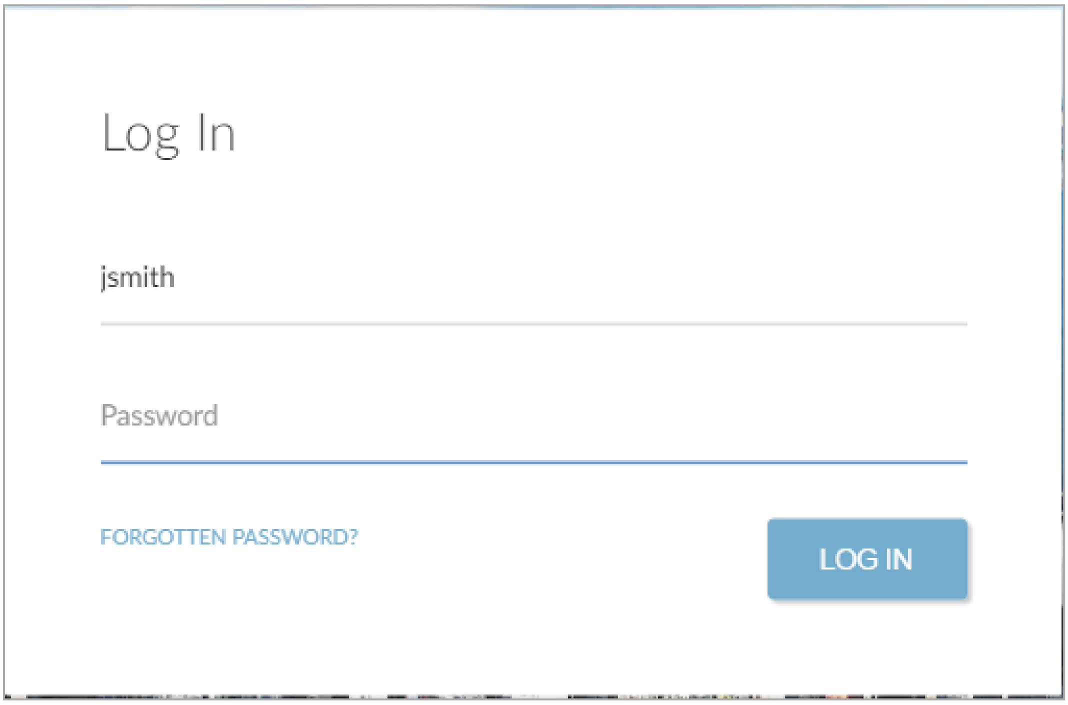
COINS OA is accessed via a web browser. You will have a URL (Uniform Resource Link or Website Address) link to COINS either from the desktop icon or by adding a link to COINS in your favourites list. Alternatively there could be a link via your intranet. The system administrator will be able to advise how you access COINS.

COINS is the system that will enable you to access details of your suppliers, subcontractors and other information about the building process, ordering and payment.

In most cases you will be required to log in to the COINS using your User ID and Password. However depending on your compliance and regulations you may have an automatic login that will enable you to select the icon and go straight to your home page.

Once you have accessed COINS, via the URL link you will be required to enter your unique User Name/Id and a Password allocated to your user name.

1. Select the link to access COINS. The sign in page will be displayed.



2. Enter your details in the User ID field and tab down to the next field. The system will remember the last person who used COINS on the computer, so you may already have your details in the field.

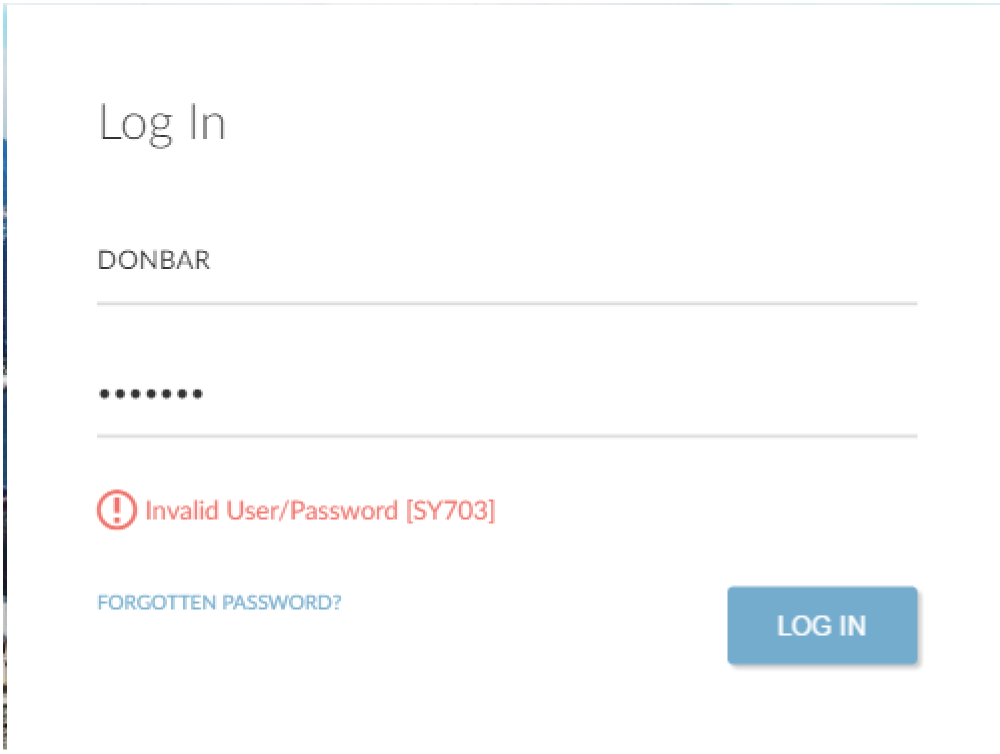
3. Enter your password into the **Password** field. The system will not show your input and will only display dots. This is for security reasons.

4. Select the Log In button to access COINS.

Your Desktop or home page will be displayed and you are ready to navigate around the system.

## 1.1 Invalid Login Details

If you enter the wrong details for either your User Id or your Password, the system will display a message stating "Invalid User / Password".




For security reasons, the system does not advise which field is incorrect.

1. Retype your User ID and password to log in correctly.

## 1.2 Log Off Correctly

There are different ways of exiting COINS and in this section we will go through the main ones, such as Inactive Session, or using the Logout icon.

### 1.2.1 Incorrectly Logging Out

If you use the Close button in the top right hand corner on the browser main screen, you will just close the internet window and will not be logged out of COINS.

**Figure 1: The Close Button Should Not Be Used**

COINS will still allocate a licence to you, until you are logged out correctly, either by the inactive session or by forcing you out of the system. Either of these methods is not recommended.

### 1.2.2 Inactive Session

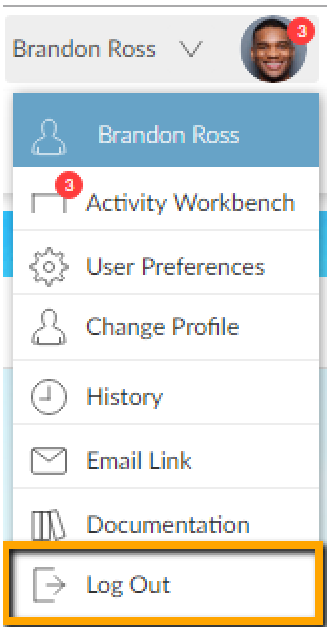
The system will be set to automatically log off any users who have not activated a screen, run a report or navigated in the system within a specific time, for example 60 minutes. This time is set in accordance with your company compliance and regulations.

A licence is allocated to each user currently logged into COINS. This means even if there is no user activity you will still is using a licence.

The system will not log you off visibly, as the screen will remain the same until you start to navigate again. It will then return you to the Log in Screen for you to enter your details.

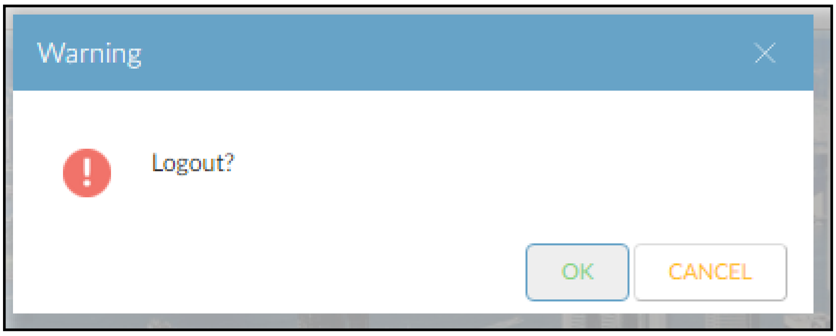
### 1.2.3 Logout Using the Logout Icon

Using the Logout icon for logging off is the recommended way of exiting COINS. This Logout icon is found on your user menu:



The Logout icon enables you to exit the system correctly. It is recommended you close all records, enquiries and reports before you exit the system.

1. Select the Logout icon. A message will be displayed asking “Logout?”




2. Select the OK button and you will return to the Login screen.

3. Alternatively select the Cancel button to stay logged in. You will stay on your current screen.

## 1.3 Passwords

Passwords are part of using any system and COINS is no exception. In this section we will explain how to change your password when it has expired and also forcing a password change.

The key feature of your password is set by each company in accordance with their security and compliance regulations. However we have listed below some recommendations to follow when creating passwords

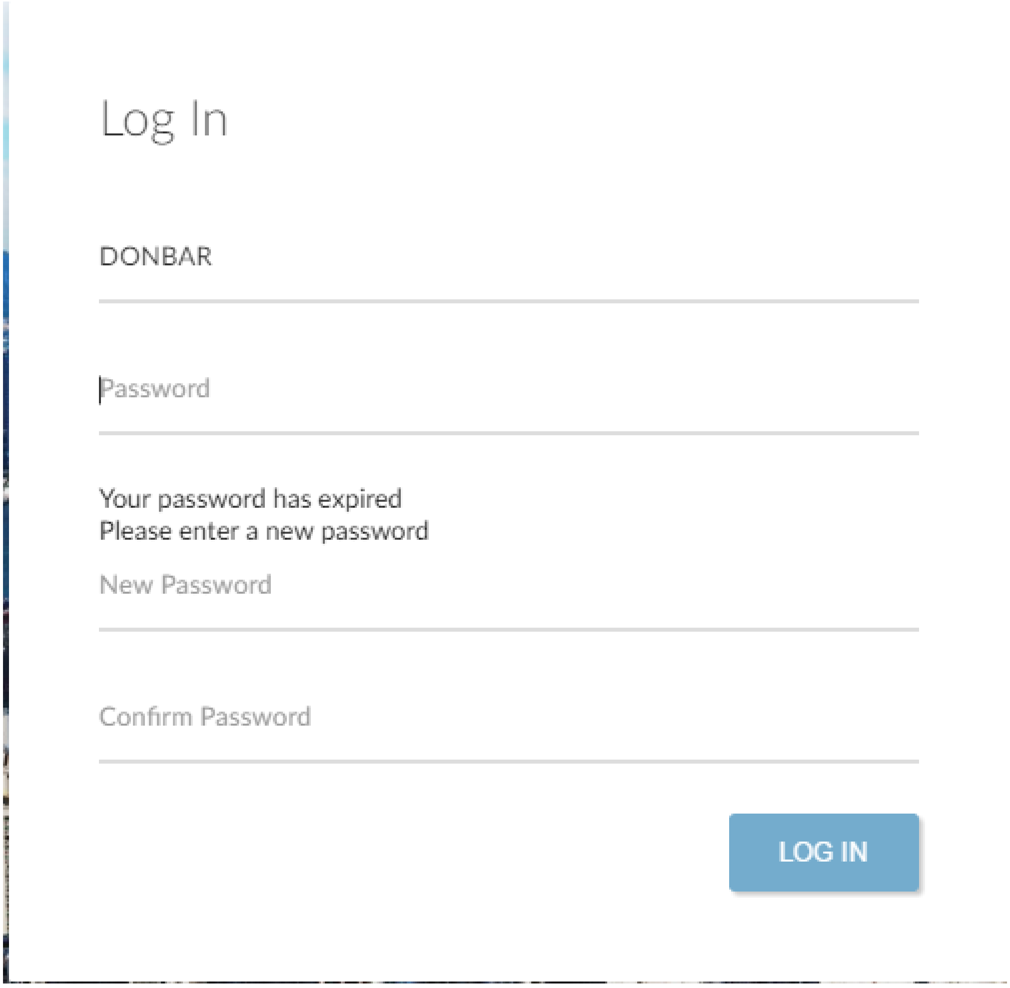
- A minimum of 6 characters
- A maximum of 28 characters
- Should have a capital letter and a number

### 1.3.1 Changing your Expired Password

Your password is set to expire in accordance with your company compliance regulations. This could be after a specific number of days, i.e. every 30 days or on the last/first day of the month. This will be calculated from the date of the last password change.

It may also be set to change on your initial login by your System Administrator when they set up your User Id and Password. It is recommended you change your password as soon as possible after receiving your log in details.

1. Enter your login details in the normal way. COINS checks all your setup and access based on your User Id and confirms your password.




2. The Change Password screen will be displayed.

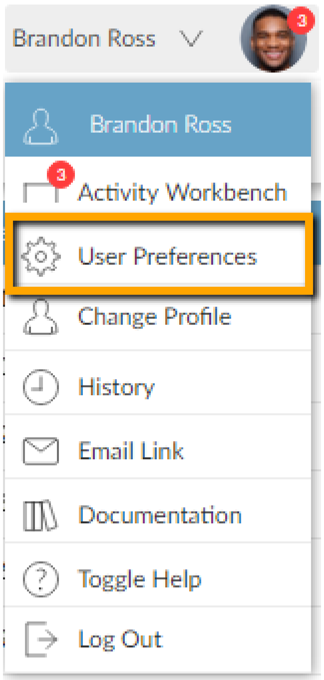
The screen will prompt you to enter your current details to confirm you are the right person, both your User ID and your current password.

### 1.3.2 Changing your Password

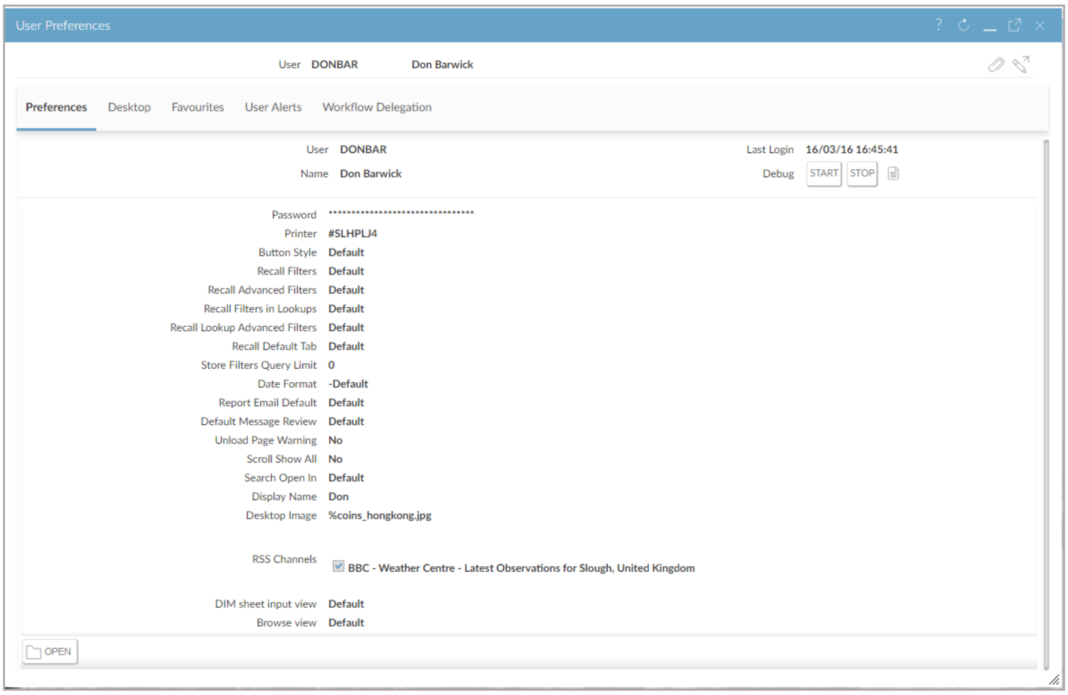
You may wish to change your password without waiting for your password to expire automatically. Forcing the change will override the expired password date and COINS will start to calculate the next expiry date from today.

To change your current password you would use the User Preferences icon.

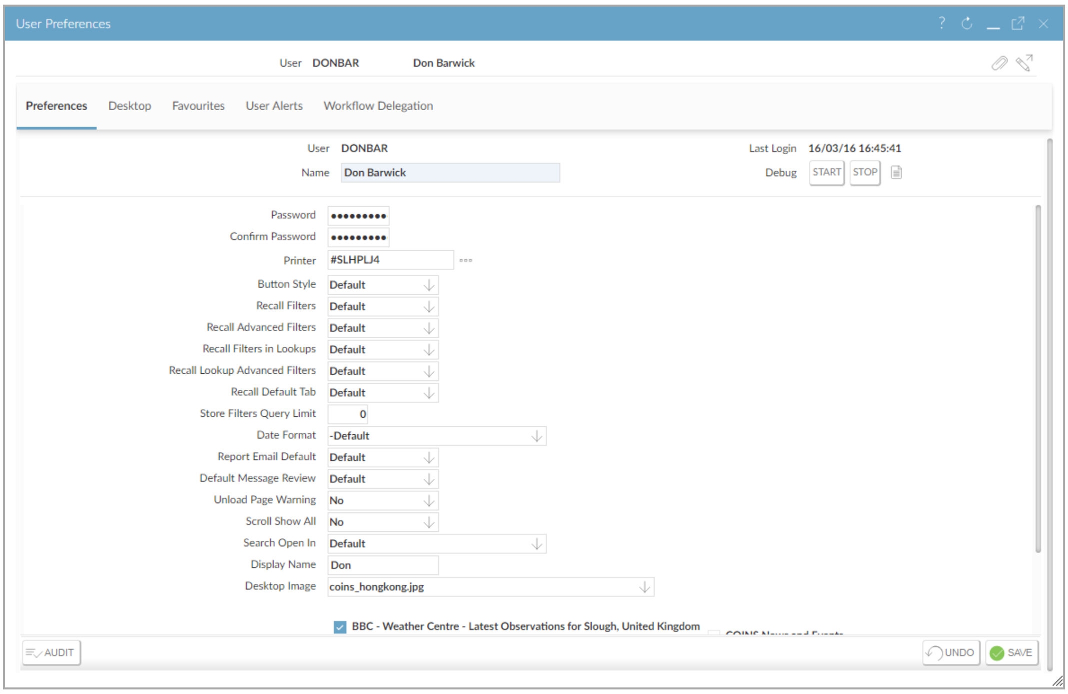
1. Select the User Preference icon from the User Menu.




2. This will display the User Preferences screen. Select the Preferences tab to show the details.




3. Select the Open button to enable you to amend the Password fields.



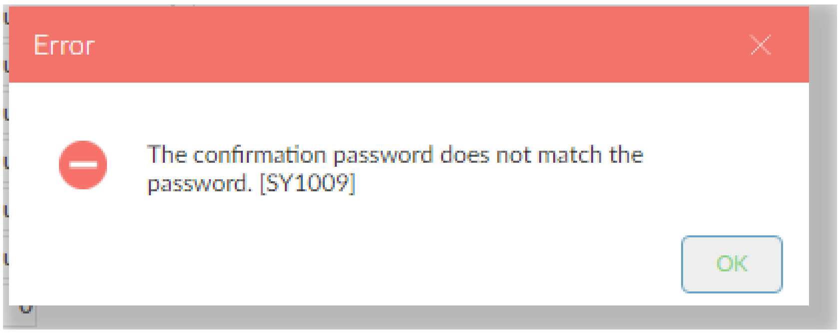
4. Only certain fields will be available for you to amend according to your User Id and system access.

5. Select or highlight the input in the Password field and press the delete key. Enter the details for your new password in the Password field. The system will display dots for the input and not the actual digits you are typing.

6. Select the Tab key to move to the next field. Re-enter the new password in the Confirm Password field. These two fields must match to enable you to save the password change.

7. Select the Save button to confirm the change to your password.

8. If the Confirm Password field does not match the Password field, a message will be displayed stating "New password is different from confirmation". Select the OK button.

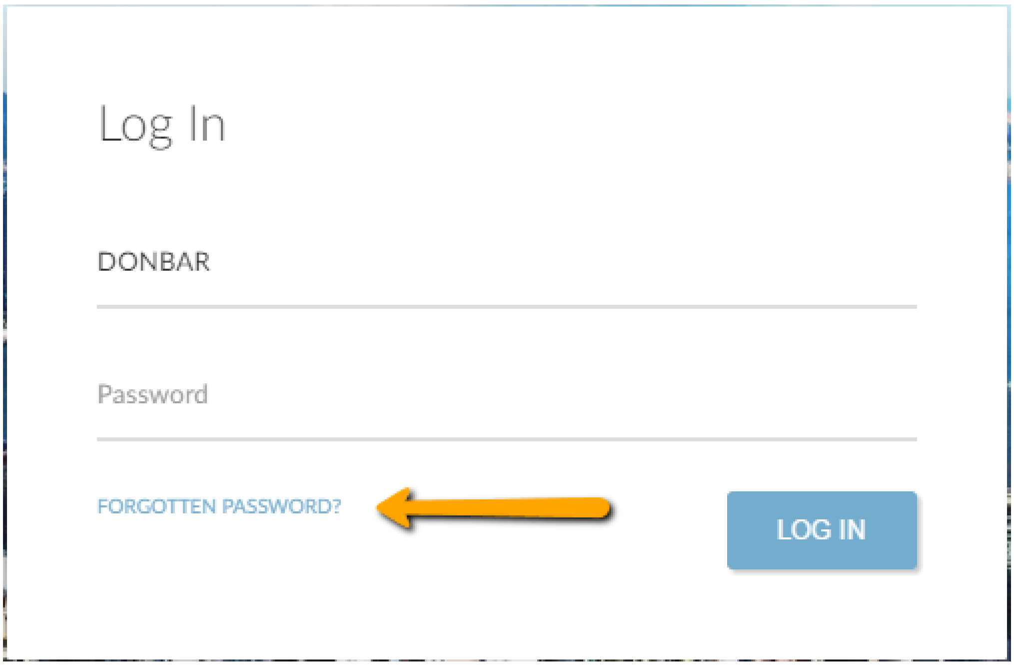



9. You will return to the User Preferences screen to enable you to enter both fields again.

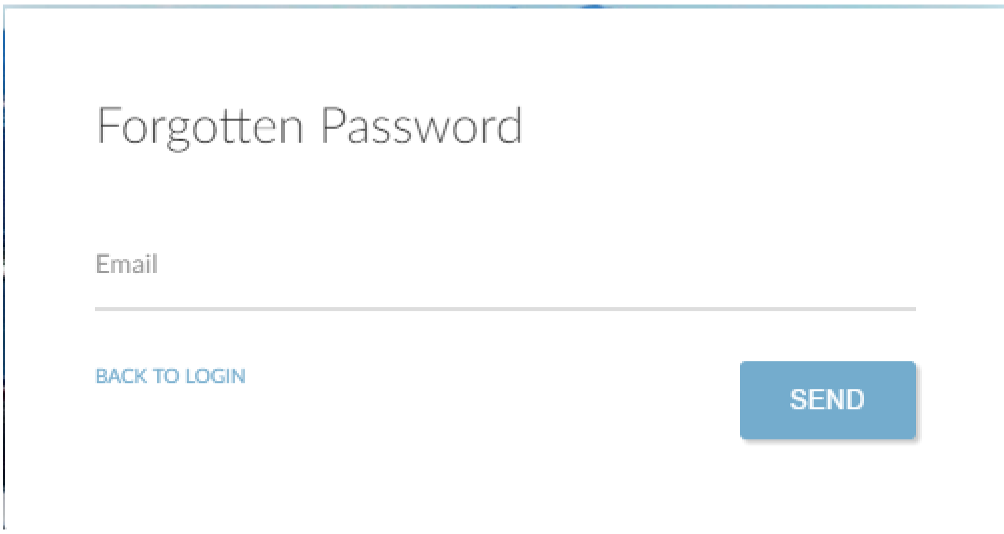
### 1.3.3 Forgotten Passwords

There is the facility available for you to reset your own password. This will enable you to reset your password, without having to ask the system administrators or the help desk. When logging into COINS the screen will display the User ID and the Password fields, only if you do not log in automatically from the icon.

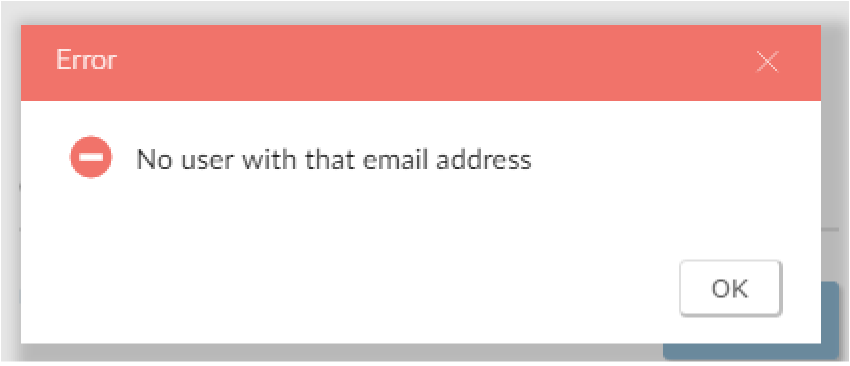
1. A Reset Password hyperlink option is available for you to select. Select the hyperlink if you need to reset your password.




2. You are required to enter your email into the field. This must be the same email as set up in your user profile.

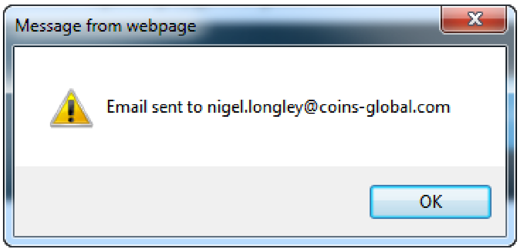



3. If the email is incorrect you will see the following message. Select the OK button to re-enter your email address.

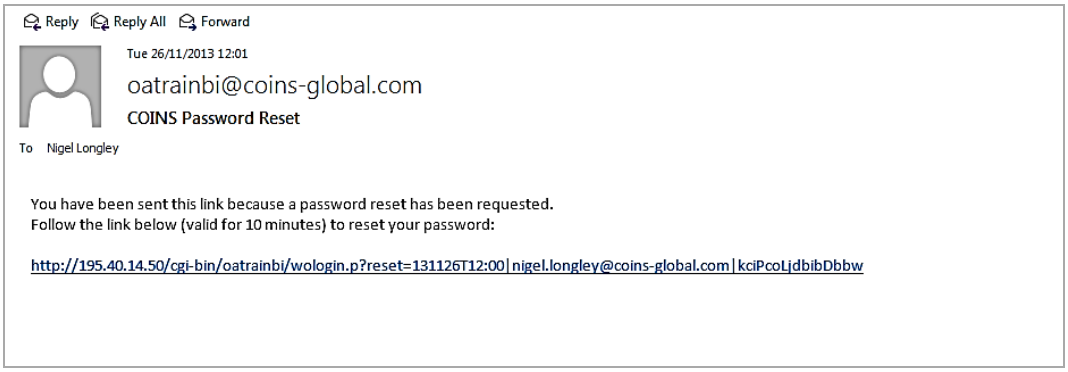



4. Enter the email address and select the Log in button.

5. The message is displayed stating "Email sent to ..........."

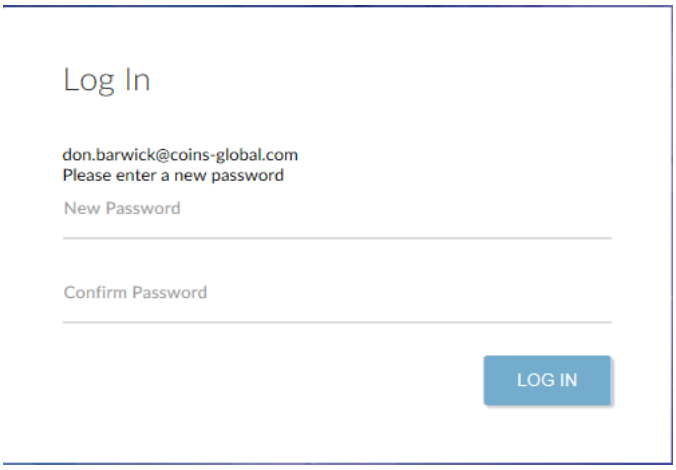



6. Select the OK button and go to your emails.




7. The email will have informed you that a password reset has been requested. The hyperlink will be effective for 10 minutes from the time of the email.

8. Select the hyperlink to confirm the link.

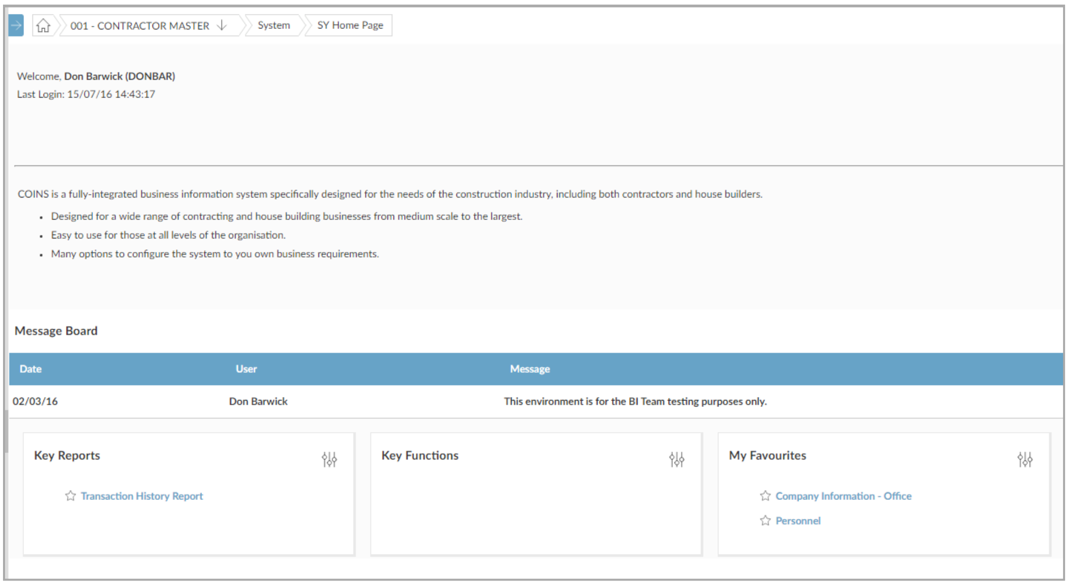



9. A new login screen will be displayed for you to enter the new password in the New Password field. Enter the same password in the Confirm Password field.

10. Select the Log in button. Your password has now been reset.

# 2 Home Page

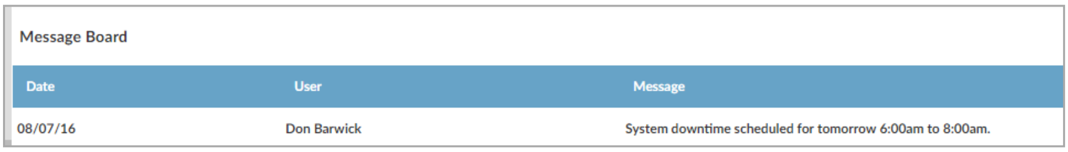
If you are not using the COINS Desktop functionality (see 3, COINS Desktop), the Home Page is displayed initially after logging in. This is set up to your user profile. This can be set to be specific to your group, to you, or a standard home page for all users. The home page has various features.




The Home Page has various panels enabling you to access information easily and efficiently.

## 2.1 Message Board

Messages can be added to the home page for all users within COINS. You can also set messages to be displayed only on specific modules.



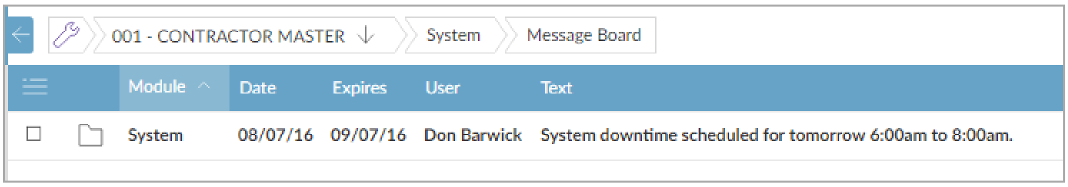

For example you may wish to process and finalise some financial figures relating to purchase orders and therefore will only need to display the message to all users who have access to the Purchase Ledger module.

It is recommended that you always have an expiry date when adding a message. This will prevent messages being shown when they should have been removed.

## 2.1.1 Adding a Message

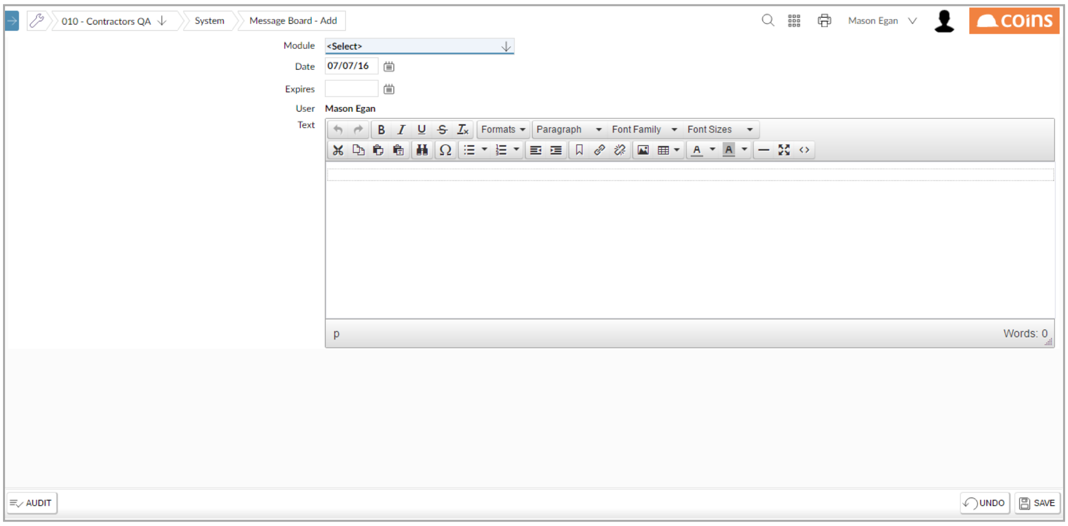
To add a message you must have the right access.

1. Click  in the Message Board area of the home page




2. Select the Add 

button. The Message Board - Add screen will be displayed. This will enable you to select the appropriate information to create the message.




3. Choose the module on whose homepage you want the text to appear.

4. Enter the date after which the message will first show on the home page. The default is today, in which case the message will be visible immediately.

5. If you want, set an expiry date for the message; it will no longer be displayed after this date.

6. Enter the text of you message. This is a free format field to enable you to create the appropriate message, using fonts, colours and other options.

7. Select the Save SAVE button.

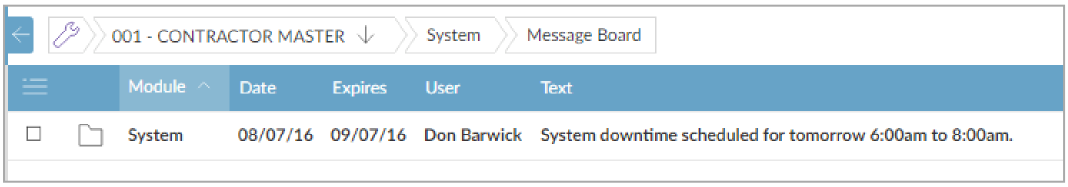
8. The message will appear on the Home Page with your user name against it.

### 2.1.2 Deleting a Message

Whilst it is recommended that any messages added should have an expiry date, there will be some circumstances where you have to manually delete the message.

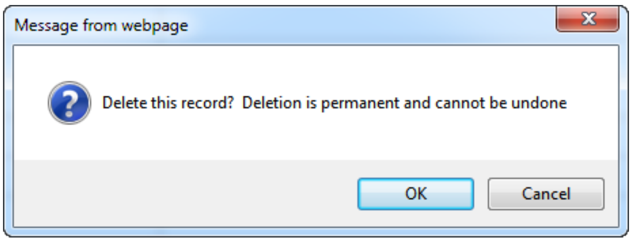
1. Click in the Message Board area of the home page

2. The Message Board screen is displayed, listing all the messages created, regardless of the user.




3. Locate the message required. Select the Tick Box adjacent to the message. Select the Delete DELETE button.

4. The system will display the warning message




5. Select the OK button. The screen will automatically refresh and the message will be removed.

You will need to refresh the Home Page for the message to be removed from there too.

# 3 COINS Desktop

COINS OA features a customisable desktop that presents key business data and from which you can run COINS functions.

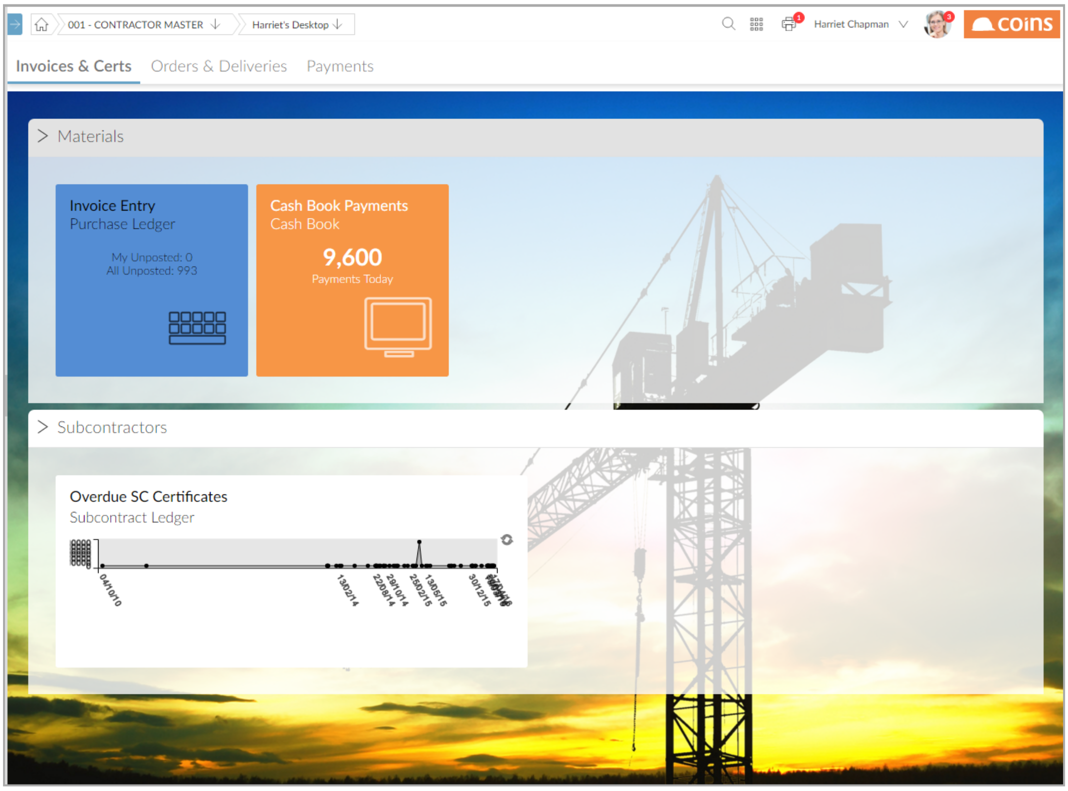
COINS functions can be run in frames which can be minimised to and restored from a new Function Bar, allowing you to have several COINS functions open in one COINS window.

New popup menus (Favourites, History, Open Actions and Unread Reports) and a search feature give quick access to COINS functions, actions and reports.

## 3.1 Desktop Features

If a Desktop has been set up on your user record, it will appear when you log in to COINS.

Figure 2: COINS Desktop




The main area of the desktop contains customisable tiles, each of which runs a COINS function. Functions run in one of three different ways, depending on how the tile has been configured:

- The desktop is hidden and the function screen is displayed in the main area.
- The function opens in a new tab.
- The function opens in a frame (see Frames).

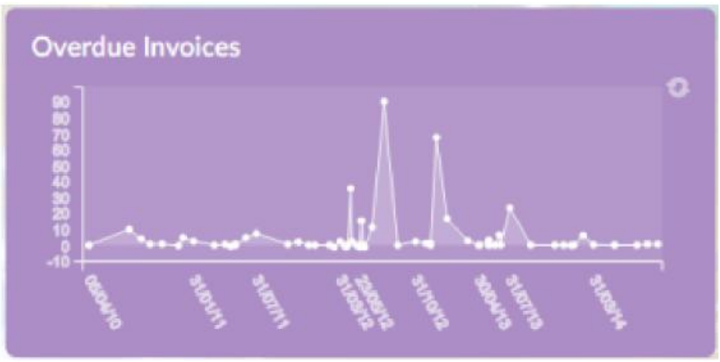
Smart tiles show summary information about the function (such as financial values or the number of items requiring attention). The values on these tiles are kept up to date and refreshed automatically (every refresh cycle, which is controlled by the SY parameter USERINFO).

**Figure 3: Desktop Tiles**


On small smart tiles, a tooltip explains what each number represents.

Tiles can also be configured to show information as a chart.

**Figure 4: Desktop Tile with Chart**




Charts are not refreshed automatically, as they may be processing a lot of historical data; they can be refreshed on demand using the refresh button. The underlying function can be run by clicking the chart title.

The tiles are arranged in sections which can be hidden or revealed by clicking the section title, and the sections can be grouped into tabs, which you can select using a link in the header area of the desktop.

When you run a function in the main area, the desktop is hidden and the function screen is displayed. You can show the desktop again using the Show/Hide Desktop button or by pressing Ctrl+Shift+! .

Clicking the logo at the right of the page header refreshes the Desktop and applies any changes that have been made in the configuration.

### 3.1.1 Company Selector

A company selector in the header bar allows you to change to a different COINS company (if you have access to more than one company).

Figure 5: Figure 5: Company Selector


### 3.1.2 Account Name and Image

The header bar shows your user name or user ID (depending on the setting of the SY parameter SHOWUSER), and an image to represent your account.

Figure 6: Account Name and Image


You can change your account image and display name by selecting Change Proifle from the user menu.

This brings up a dialogue box where you can browse for a new image and enter a different display name.

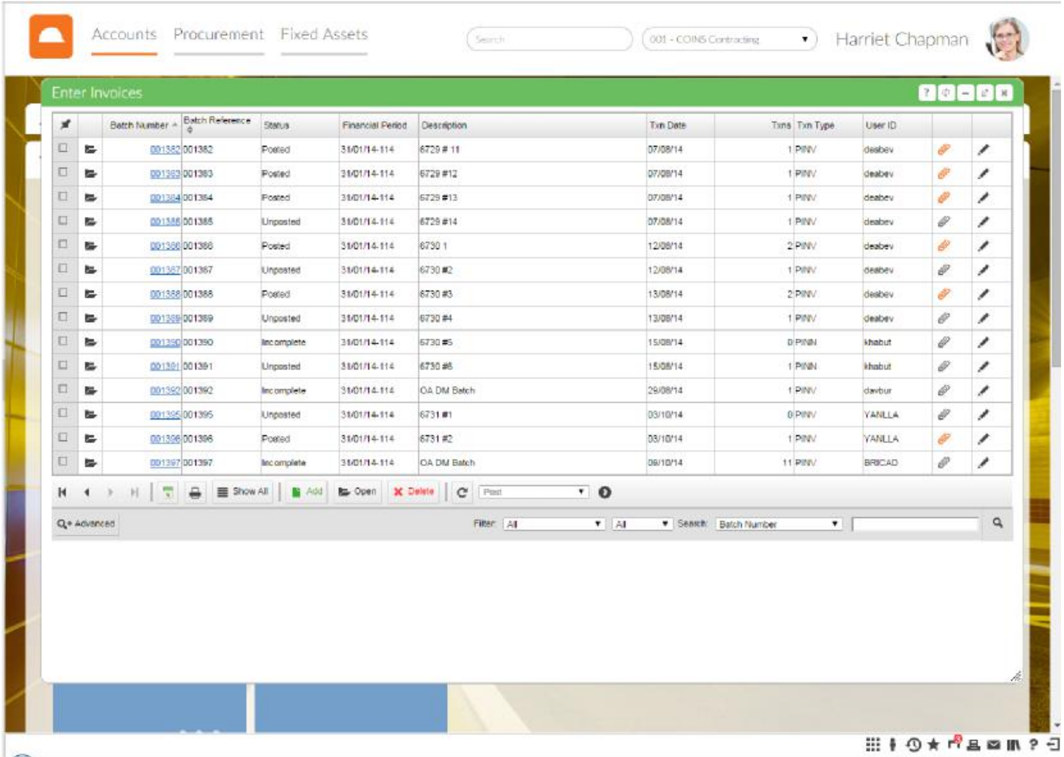
The image must be a JPG file, and ideally should be approximately 60px by 60px. You can use larger images but the browser will resize them, which does not always produce good results.

The account image can also be configured by the system administrator; see 3.2.3, Images.

### 3.1.3 Frames

Some COINS functions, when run from the Desktop, open in a frame, which you can resize, maximise or minimise.

**Figure 7: COINS Function in a Frame**




The colour of the frame's title bar matches the colour of the tile from which it was run.

Buttons are available in the title bar to close, maximise, minimise or refresh the frame, and to show the side-frame help for the function.

**Figure 8: Frame Buttons**

You can resize a frame by dragging the handle in the bottom-right corner: . COINS remembers the size of the frame; the next time you run the frame, it opens with the new size.

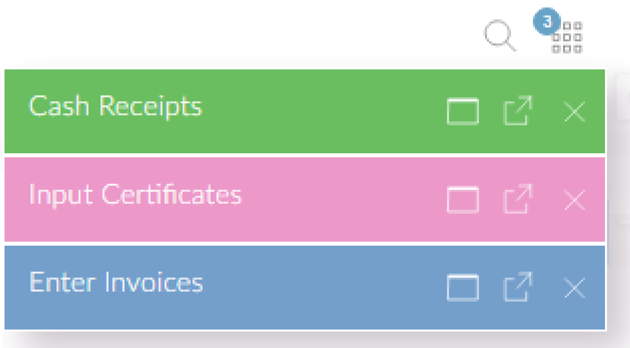
### 3.1.4 Frame Menu

If you minimise a frame, it moves to the "Frame Menu"in the page header. When frames are minimised, an indicator on the Desktop button shows how many there are.


The Frame Menu hides automatically, but you can move the mouse pointer over the Desktop button in the page header to show the Frame Menu with the minimised functions on.

Click the restore  or maximise  button on a frame to expand it again.

**Figure 9: Frame Menu**



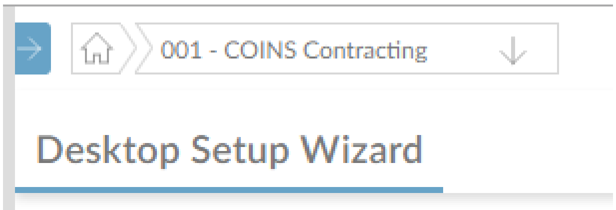

Although the only way to run functions in frames is from a Desktop tile, if tiles have been minimised, the Frame Menu is available from the page header of standard COINS screens, and functions in frames can be restored on top of standard COINS screens.

## 3.2 Desktop Configuration - User

### 3.2.1 Desktop Setup Wizard

If a blank Desktop has been set up for you, there is a link to the Desktop Setup Wizard at the top of the screen.

**Figure 10: Link to Desktop Setup Wizard**




NOTE

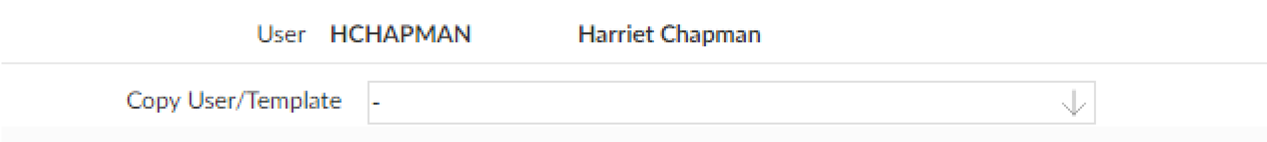
You can also run the Desktop Setup Wizard from a link on the User Preferences screen.

The Desktop Setup Wizard allows you to set up the layout of your Desktop (which tabs and sections it contains) and which functions to add to it.

The wizard consists of a sequence of screens:

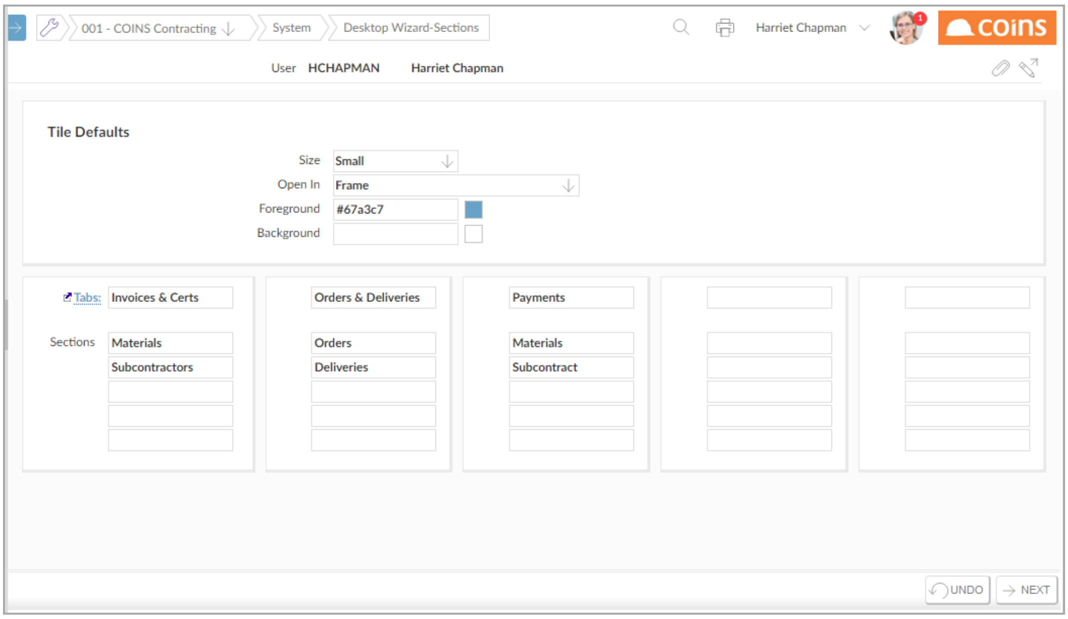
- The first screen allows you to choose an existing Desktop to copy. This is used as the 'starting point' for your Desktop.

**Figure 11: Desktop Wizard – Desktop Selection**



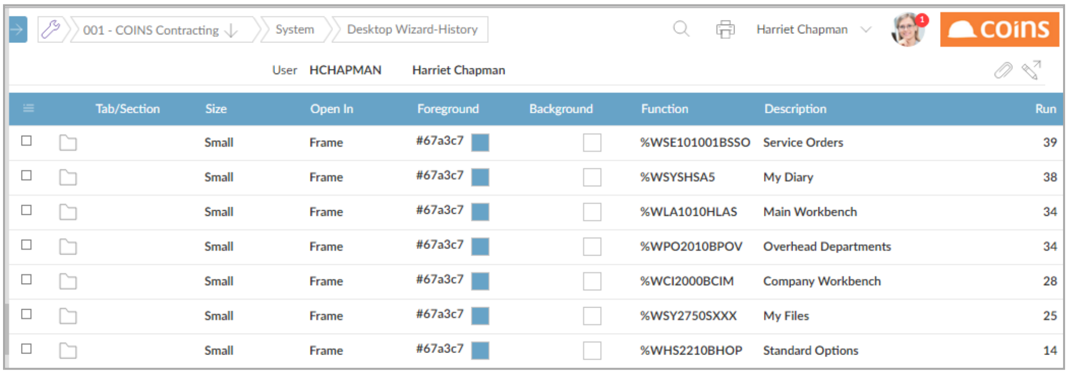

- If you select an existing Desktop, COINS creates a copy of that Desktop, which you can then modify (without affecting the original).
- If you select the Desktop that has your own user ID, COINS deletes that Desktop, and creates a new, empty desktop for you.
- If you leave this blank, COINS creates an empty desktop for you.
- The Sections screen allows you to name the tabs you want on the desktop, and the sections you want on each tab.

### Figure 12: Desktop Wizard - Sections




- The History screen allows you to select the functions to add to the Desktop. This shows a list of functions.

### Figure 13: Desktop Wizard - History




At the top of the list are the functions that are already on your Desktop (if any). Below that are other functions you have run, arranged according to how often you have run them. You can add any of these to your Desktop, and choose which section to add them to.

COINS creates tiles for the functions you choose, on the sections you specify. You can then modify the appearance of the tiles, and how the functions open, using the Desktop tab in ***User Preferences***.

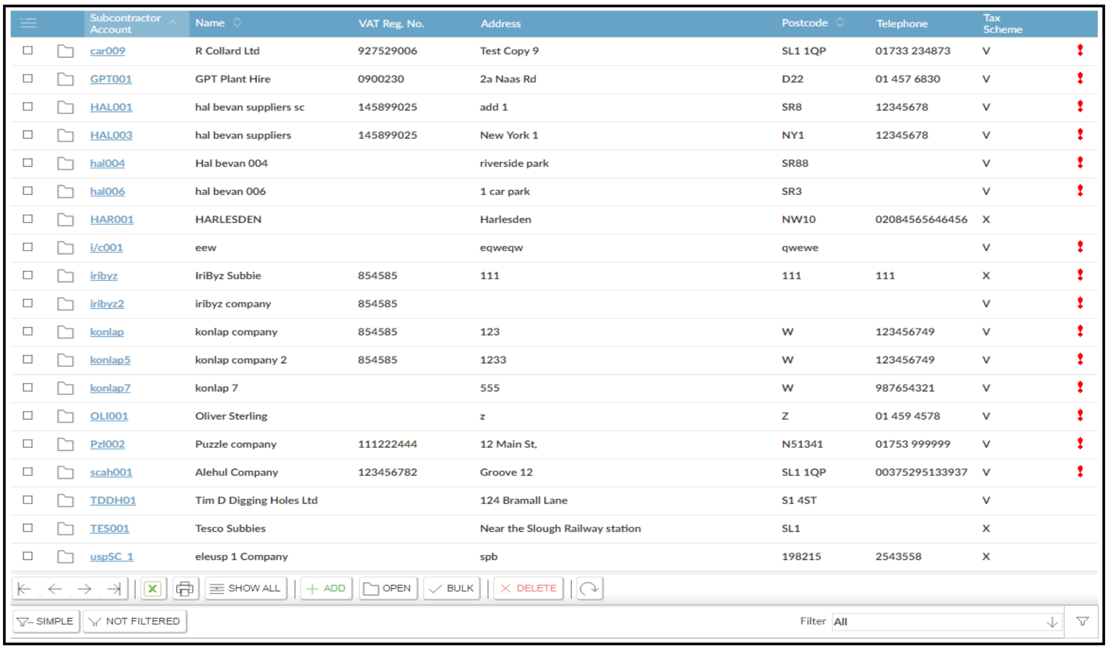
When you click the Next button on the History screen, COINS refreshes the Desktop and applies the changes.

# 4 Basic Navigation

Most of the COINS screens will follow the same page layout with the menu on the left and the main work or information displayed on the right.

In this chapter we will go through some other basic navigation information to assist you in navigating effectively whilst using COINS.

Figure 14: A Standard Layout



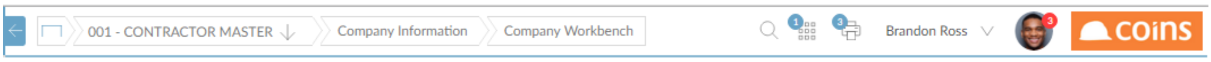
| Subcontractor Account | Name | VAT Reg. No. | Address | Postcode | Telephone | Tax Scheme |
|---|---|---|---|---|---|---|
| car009 | R Collard Ltd | 927529006 | Test Copy 9 | SL1 1QP | 01733 234873 | V |
| GPT001 | GPT Plant Hire | 0900230 | 2a Naas Rd | D22 | 01 457 6830 | V |
| HAL001 | hal bevan suppliers sc | 145899025 | add 1 | SR8 | 12345678 | V |
| HAL003 | hal bevan suppliers | 145899025 | New York 1 | NY1 | 12345678 | V |
| hal004 | Hal bevan 004 | | riverside park | SR88 | | V |
| hal006 | hal bevan 006 | | 1 car park | SR3 | | V |
| HAR001 | HARLESDEN | | Harlesden | NW10 | 02084565646456 | X |
| i/c001 | eew | | eqweqw | qwewe | | V |
| iribyz | IriByz Subbie | 854585 | 111 | 111 | 111 | X |
| iribyz2 | iribyz company | 854585 | | | | V |
| konlap | konlap company | 854585 | 123 | W | 123456749 | V |
| konlap5 | konlap company 2 | 854585 | 1233 | W | 123456749 | V |
| konlap7 | konlap 7 | | 555 | W | 987654321 | V |
| OLI001 | Oliver Sterling | | z | Z | 01 459 4578 | V |
| Pzl002 | Puzzle company | 111222444 | 12 Main St, | N51341 | 01753 999999 | V |
| scah001 | Alehul Company | 123456782 | Groove 12 | SL1 1QP | 00375295133937 | V |
| TDDH01 | Tim D Digging Holes Ltd | | 124 Bramall Lane | S1 4ST | | V |
| TES001 | Tesco Subbies | | Near the Slough Railway station | SL1 | | X |
| uspSC_1 | eleusp 1 Company | | spb | 198215 | 2543558 | X |



As we go through the various navigational tips we will refer to this screen so you can see where all the individual components, icons and buttons are located.

## 4.1 Page Header

COINS function screens and the COINS Desktop now share the same page header.

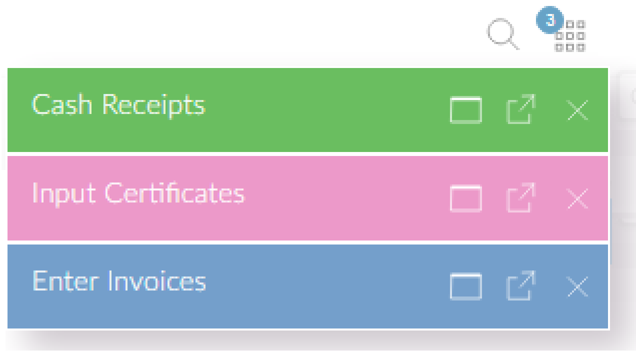



The title now includes a drop-down company selector, and shows the module that the function belongs to.

A button allows you to open the global search.

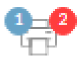
The Desktop button has been moved into the page header. When frames are minimised, an indicator on the Desktop button shows how many there are.


When you move the mouse pointer over the Desktop button, a list of minimised frames is shown.



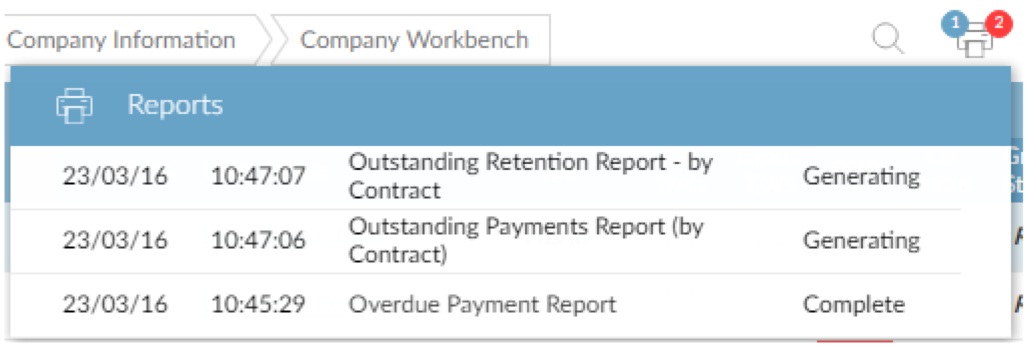


Your profile picture is now shown in the header. A red indicator shows how many outstanding actions you have.

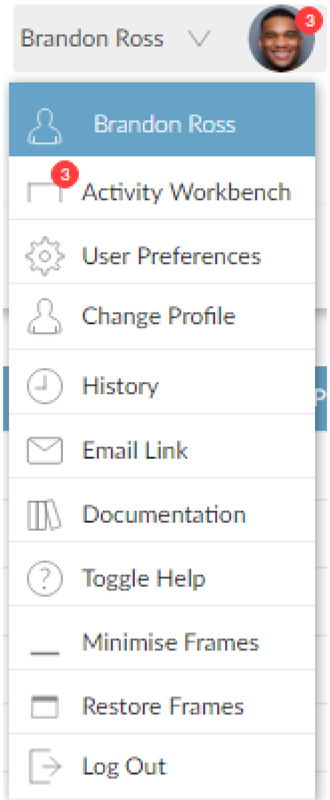



The report status icon has been moved to the header. Coloured indicators show how many of your reports are generating (red) and unread (theme colour).

When you move the mouse pointer over the report status icon, the list of unread reports is shown in a popup.

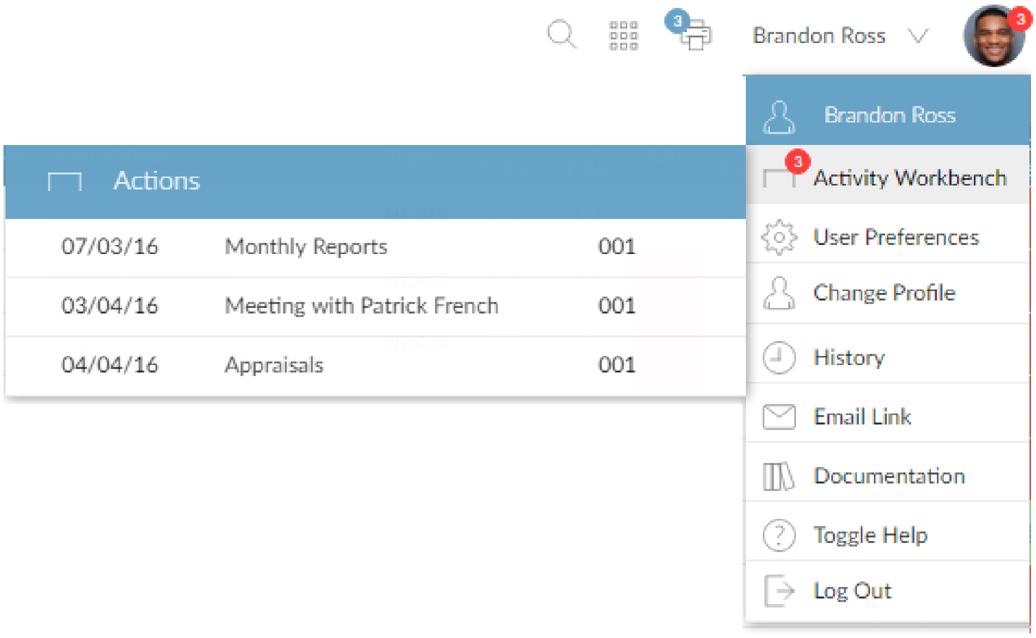



A drop-down menu is available when you move the mouse pointer over your display name.




This gives access to the following functions:

- Activity Workbench – this shows the number of your outstanding actions. When you move the mouse pointer over the menu item, a list of the outstanding actions appears; you can click an action to open it in the Activity Workbench.




- User Preferences – This opens the User Preferences screen in a frame.
- Change Profile – This allows you to change the display name and profile picture shown in the header.
- History – This shows a separate menu of the functions you used most recently, from which you can run those functions, or add them to your COINS Desktop as tiles.
- Email link – This allows you to send someone a link to the current page.
- Set Home Page – If you do not have a COINS Desktop configured, this sets the current page as your user home page (the page that opens when you log in to COINS). If you have a Desktop configured, this option is not available.
- Documentation – This opens the COINS documentation library in a new tab or window.
- Toggle Help – This shows or hides the side-frame help.
- Minimise All – This minimises all open frames.
- Restore All – This restores all minimised frames. The Minimise and Restore options are only available if you have at least one frame open.
- Log Out – This logs you out of COINS.

Clicking the COINS logo in the page header refreshes the page.

## 4.2 Global Search

The Global Search feature allows you to search for records in the COINS database (for example, you might search for a contract by typing a word or words from the contract name, or for a supplier by typing the postcode). It also allows you to find and run COINS functions. The search is configurable: your system administrator can choose which tables, and which fields on those tables, to include in the search.

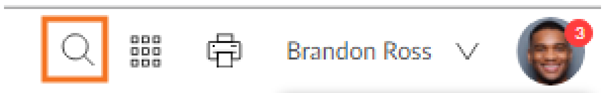
| NOTE |
| --- |
| The Search frame is only available if global search is enabled by the configuration of both your system and your user record. The results returned by the search are also subject to your system's configuration. |

To use Global Search:

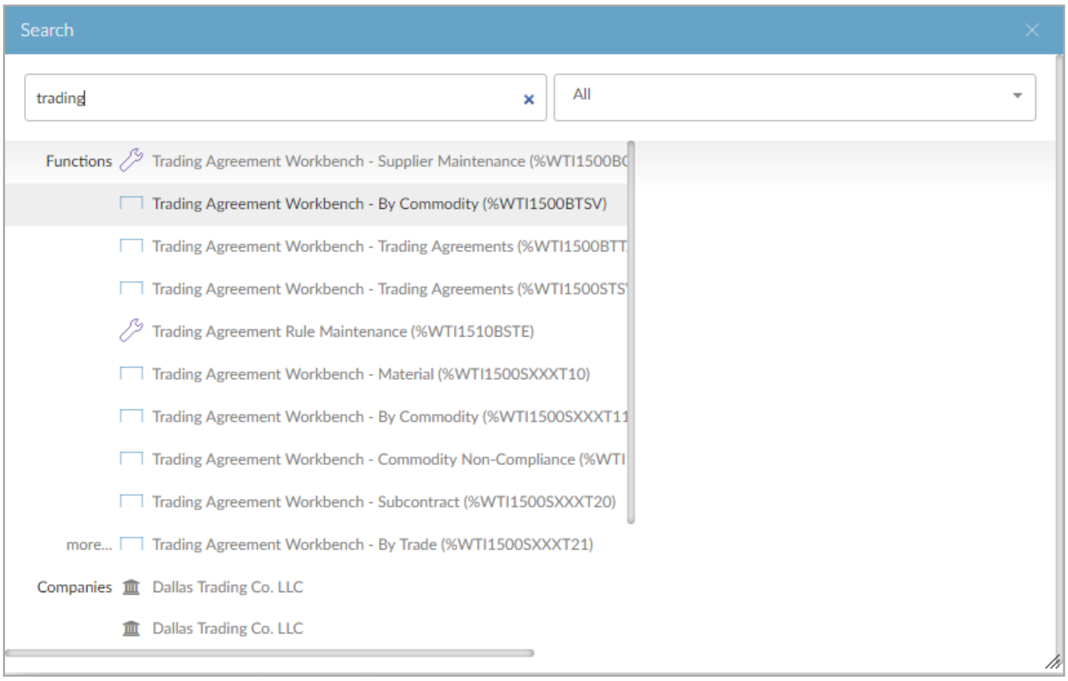
1. Launch the Search frame by:

   - Pressing Ctrl+Shift+?.

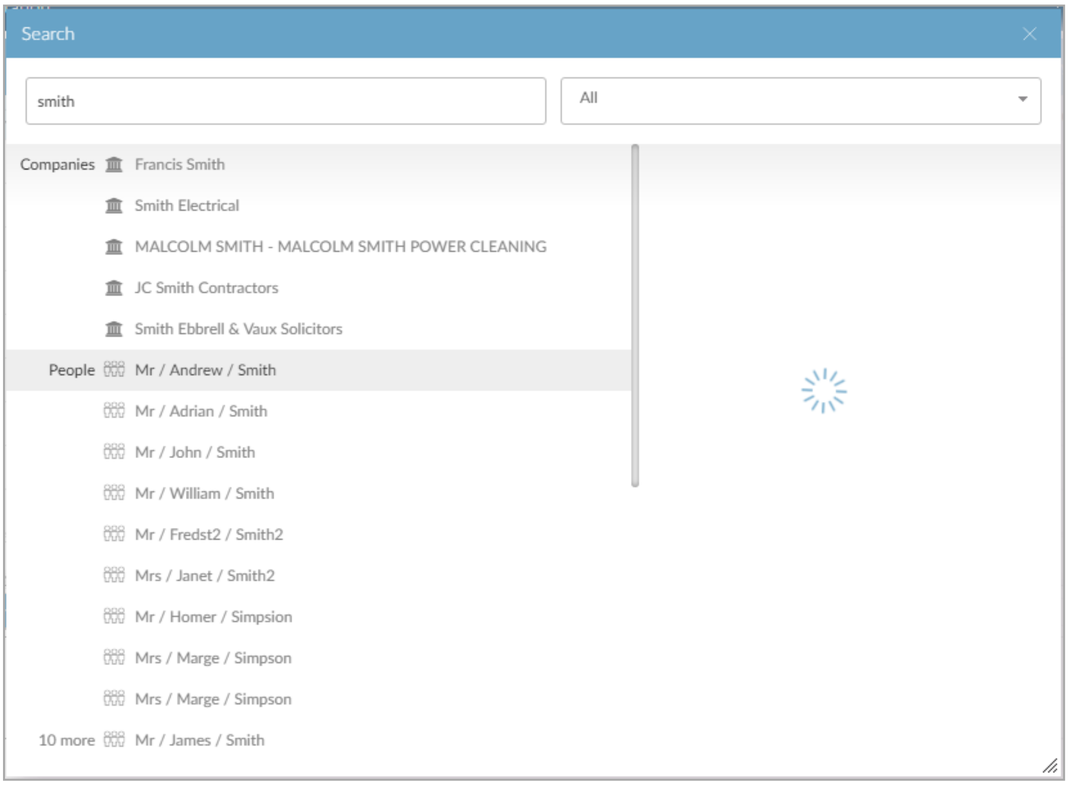
   - Clicking the button in the page header.




The search frame opens


Search
trading
All
Functions
Trading Agreement Workbench - Supplier Maintenance (%WTI1500B
Trading Agreement Workbench - By Commodity (%WTI1500BTSV)
Trading Agreement Workbench - Trading Agreements (%WTI1500BTT
Trading Agreement Workbench - Trading Agreements (%WTI1500STS
Trading Agreement Rule Maintenance (%WTI1510BSTE)
Trading Agreement Workbench - Material (%WTI1500SXXXT10)
Trading Agreement Workbench - By Commodity (%WTI1500SXXXT11
Trading Agreement Workbench - Commodity Non-Compliance (%WTI
Trading Agreement Workbench - Subcontract (%WTI1500SXXXT20)
more...
Trading Agreement Workbench - By Trade (%WTI1500SXXXT21)
Companies
Dallas Trading Co. LLC
Dallas Trading Co. LLC

2. Type a word or words to search for. As you type, COINS displays matching records, grouped by category.




- The results will match words that begin with the words you type.
- If you type two or more words, search will return results that include both (or all) the words you typed. You can type the words you want to search for in any order. For example:

  **report balance** or **balance report** or **bal rep**
  **manchester const** or **manch construction**

- To search for an exact match, enclose it in quotation marks. For example, to search for names that contain the whole word "sub", but not "subcontract", type **"sub"**.
- You can also use | (pipe) to represent "or", and & to represent "and". For example:

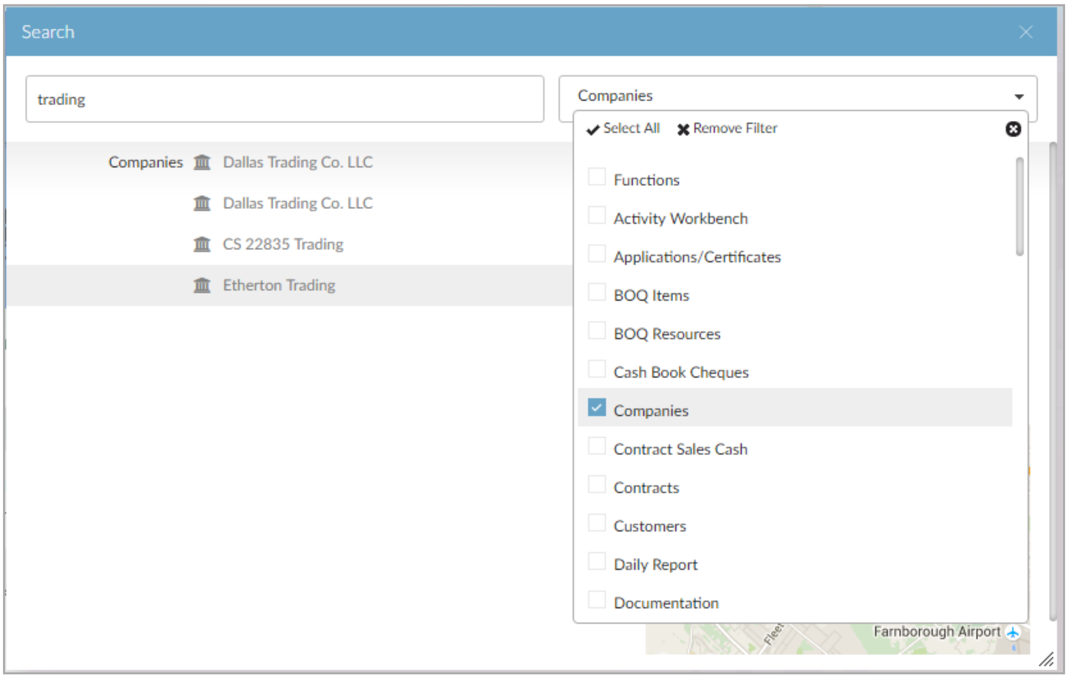
**pty&ltd** will search for records containing both **pty** and **ltd**; **ltd|limited** will search for records containing either **ltd** or **limited**.

Using parentheses makes the relationship clearer and makes it easier to get the expected result. For example:

**(John|Sally) Smith** will find John Smith or Sally Smith.

- You can enter the module code to help identify functions with similar names (for example, **posting report CS** will show only Contract Sales posting reports).
- If the extended search capability is enabled, the search supports stemming. This means that (even if you use quotation marks around a search term) the results will include words that have the same word stem. For example, a search on "build" might return results that include "builds", "builder", and "building".

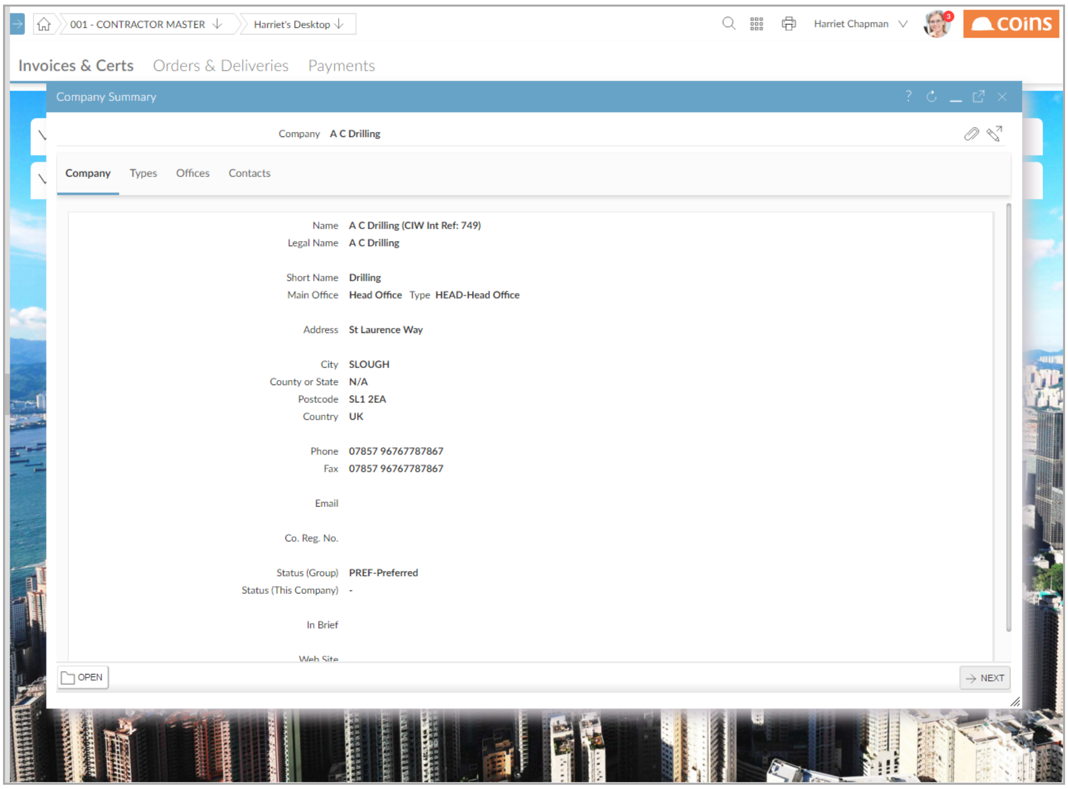
3. You can filter the search to show only records that belong to the categories you select.




COINS remembers your filter settings and the text you searched for, and uses them the next time you open Global Search (until you log out).

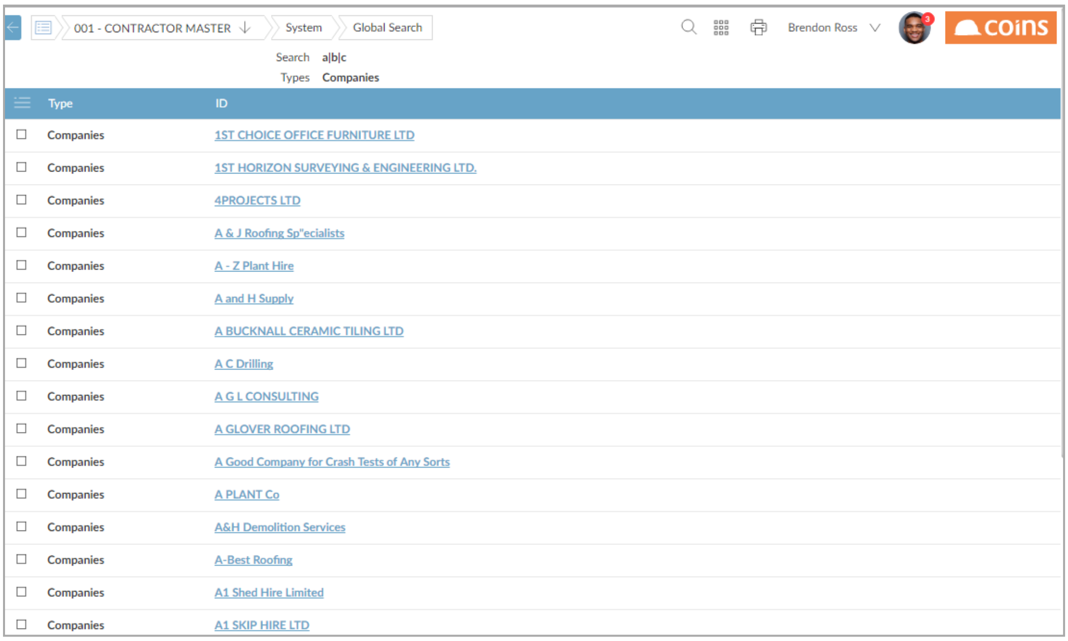
4. Click the link on an item or press Return on a highlighted item to launch the corresponding link page. Depending on how the link has been configured, this may open in a new frame, in a new tab, or in the current main area.

| NOTE |
| --- |
| You can change how the links open: ***User Preferences*** > Preferences tab > **Search Open In** field. |



Alternatively you can right click to choose to open it in a new tab or new window.

If the total number of matches is less than 500, the results show all matches.  If the total number of matches is 500 or more, only the first 10 results from each category are shown, and if there are more than 10 results in a category, a more... link takes you to a full-screen browse of those records.




***Global Search*** and ***Function Search*** are also available as "traditional" OA functions, on the System > System Setup menu regardless of the value of SY/GLOSRCH or the settings on the user record.

## 4.3 Menus

Menus are always on the left hand side of the screen.Menus are User specific and therefore can be created for individual users, groups of users or generic within the company.

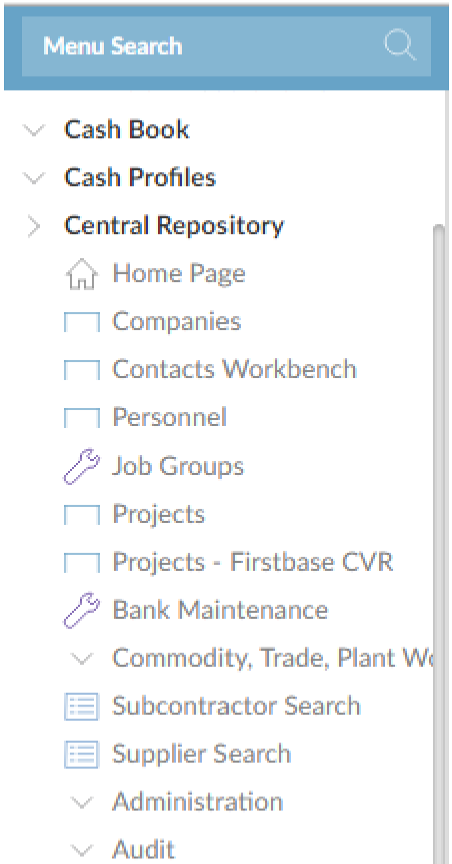
### 4.3.1 Menu structure

Menus are constructed using Menu options and also Submenus. Similar options or tasks are grouped together under a Submenu, which are easily identified.

The Menu options are actions, tasks, enquiries and reports available to enable you to use COINS.

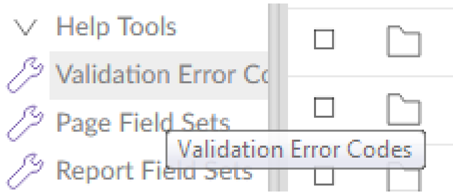
1. To open a Submenu, select the arrowhead icon and the Menu options will be displayed.

There are a number of different icons used to easily identify the types of options available, i.e. Enquiries, Reports, and Input etc. These are defined in the following table.




| Icon | Name | Description |
|---|---|---|
| | Enquiry | Enquiry to enable the data to be filtered. A snapshot of specific information. |
| | Reports & Forms | Reports or other printable output (such as cheques, remittances etc. ) |
| | Workbench | Displays a list of records with facility to dig deeper into each record. |
| | Input | To input a record. |
| | Configuration | To configure a specific area, i.e. a list of codes |
| >>> | Administration | Only accessed by specific people. System administration areas. |
| >>> | Process | To start a system process automatically within the system, i.e. to calculate a VAT return. |

Menus can be configured to Users, groups of Users, Roles or Company specific. Therefore there may be Menu icons defined above you may not have when you view your menu.

1. 

To use a Menu Option, select the Name of the Menu option, as these are hyperlinks to the actual screen. A text box will display the full name of the Menu Option if you move the mouse pointer over the option.

2. The selected screen will be displayed on the right.

### 4.3.2 Expanding the Menu

The Menu Text box will enable you to view the Menu Option description even if the menu itself truncates the description in the menu panel.

You can extend the Menu panel to the width you require.

1. Move the mouse pointer over the panel line dividing the menu and the screen. The cursor will change to reflect a line with double arrows.

2. Hold the left mouse click down. This picks up the line.

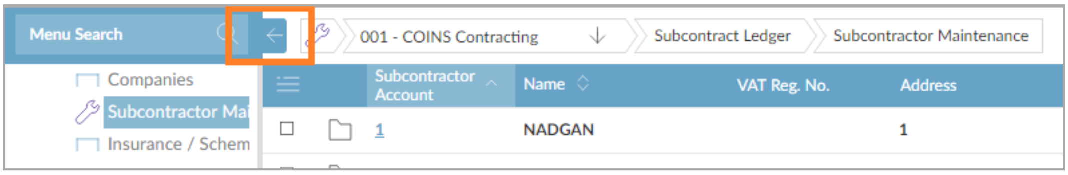
3. Drag the cursor across to where you wish the menu panel to be and release the hold. The panel will move with you as you drag the cursor. COINS remembers the width of the menu panel, so next time you open the menu, it will open to the width you selected.

### 4.3.3 Display / Hide the Menu

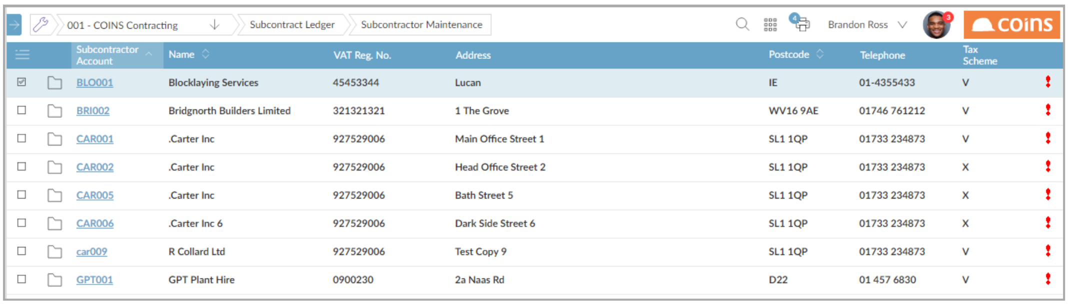
When you are looking at certain browse screens or enquiries, you may not be able to view all the columns on the screen. You will need to scroll across the bottom.

If you wish to see the entire screen, you can hide the menu to enable the screen to stretch out.

1. Select the arrow icon to the left of the screen title to hide the menu. The arrow will point in the direction it will move, for example, push the menu closed.

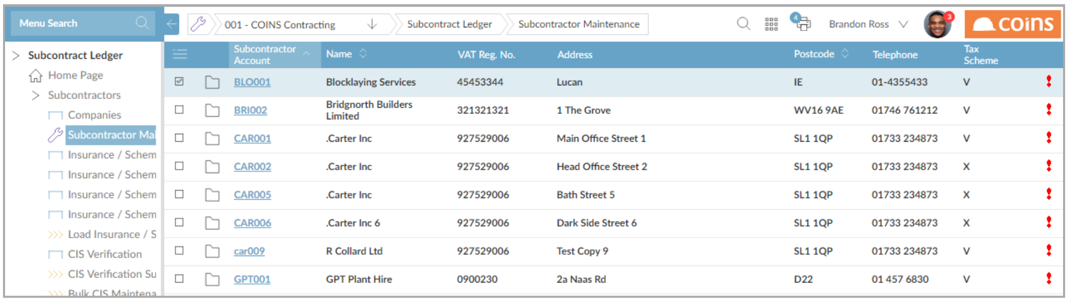



2. The menu will have closed and the screen can now been seen in full.




3. To open the menu and return to the standard screen layout select the arrow. The arrow will point in the direction it will move.

4. The menu will be visible.




## 4.4 Moving through Screens

When moving through the various screens, there are some useful shortcuts keys that will help you navigate.

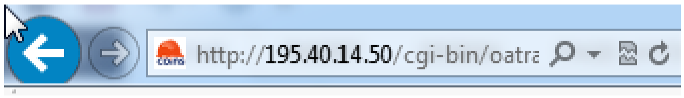
### 4.4.1 Using the Back/Forward Buttons

You may wish to go back the previous screen when using COINS, especially when you have added filters to a browse screen or workbench.

If you select the option again from the menu, you will lose all the filters you have input.

Using the back and forward buttons is the best way to keep your filters. This is available as each page is separate and therefore can be recalled.

1. Select the Back button to go the previous screen. This will go back the previous screen with all the filters and search criteria.




An alternative option to go back to the previous screen would be to select and hold the ALT key and select the Left Arrow key.

As you go back through the previous pages, you may wish to return or go forward and have all the filters originally selected saved and in place.

2. Select the Forward button to go to the next page. You must have seen this page to be able to move forward to it.


An alternative option to go back to the previous screen would be to select and hold the ALT key and select the Right Arrow key.

## 4.5 Browse Screens

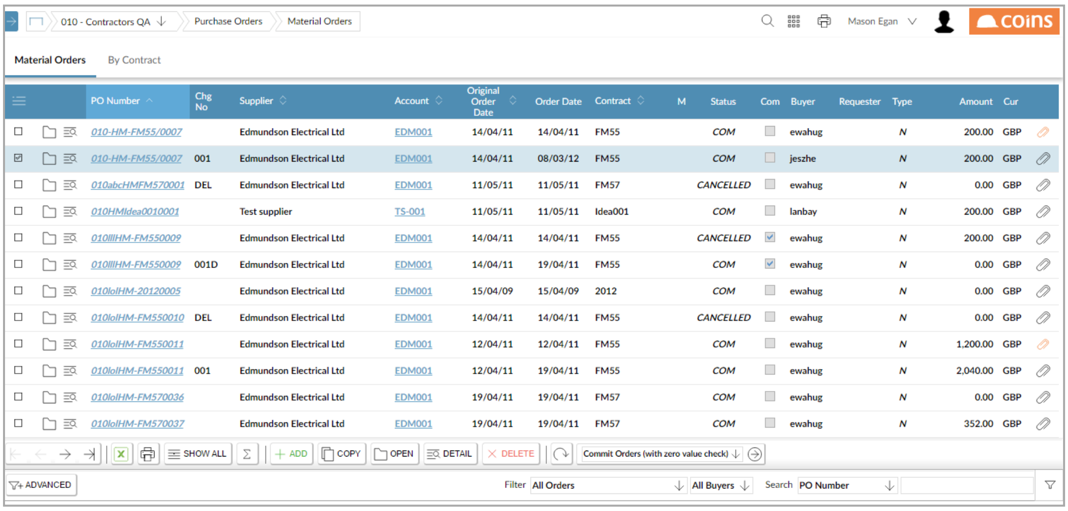
COINS has many Browse screens which enable you to view a set of records matching predefined search criteria. Tabs are available on Browse screens that are used to filter the same data in different ways or the sort order, i.e. All Material Orders and By Contract.

They enable you to page up and down, move to the first record, or the last record, select records specific records or a block of records.

You can change the sort order, drill down on certain information using hyperlinks, export data into Excel, and print certain information to suit your specific requirements.

### 4.5.1 Browse Screen features

There are many features available when using the Browse screens. These are standard and the main principles can be used when viewing the screens.




These are some of the main features available to you.

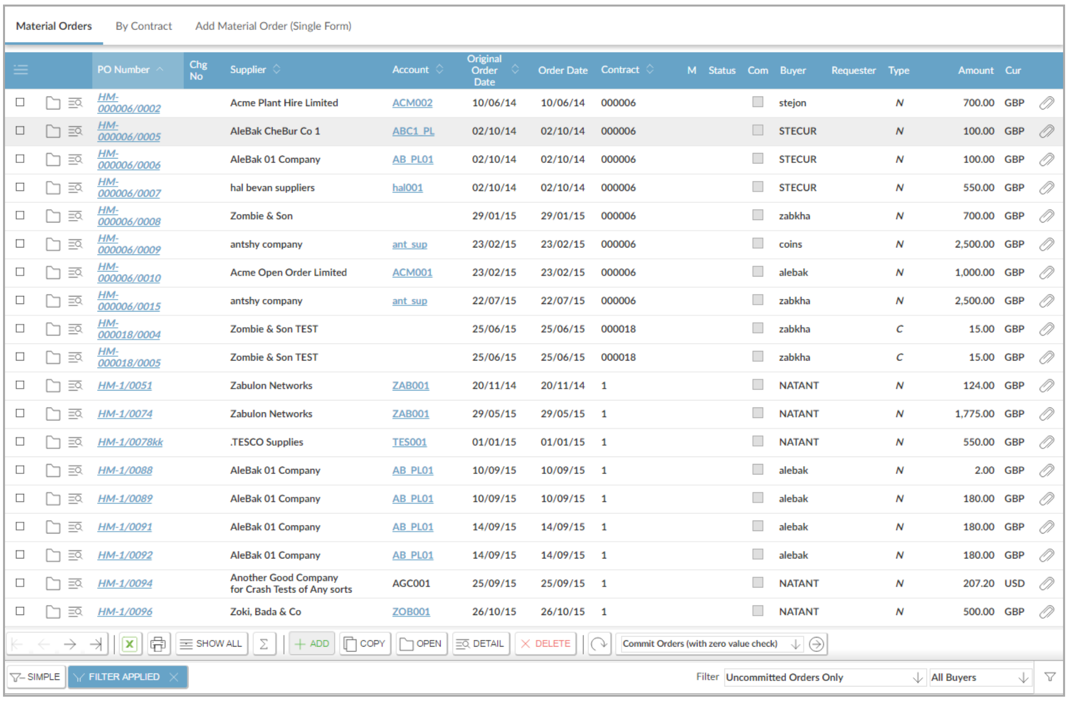
### 4.5.1.1 The Title Bar

The title bar on the browse screen will show exactly where you are within the system, like a breadcrumb trail. It shows the current company, the function you are running, and the module it belongs to.


In our example the module is Purchase Ledger, and the function is Add Invoice Batch.

### 4.5.1.2 Changing the Sort Order

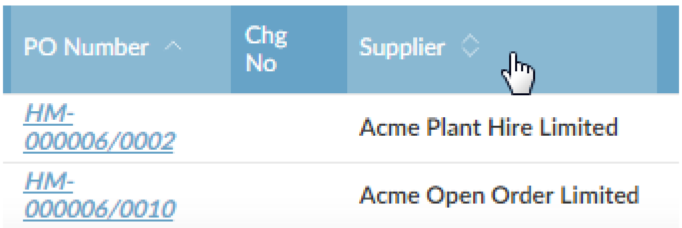
The information is listed in columns of data and therefore has a predefined sort order allocated when the screen is initially opened.



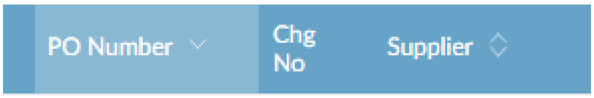

| PO Number | Chg No | Supplier | Account | Original Order Date | Order Date | Contract | M | Status | Com | Buyer | Requester | Type | Amount | Cur |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| HM-000006/0002 | | Acme Plant Hire Limited | ACM002 | 10/06/14 | 10/06/14 | 000006 | | | | stejon | | N | 700.00 | GBP |
| HM-000006/0005 | | AleBak CheBur Co 1 | ABC1_PL | 02/10/14 | 02/10/14 | 000006 | | | | STECUR | | N | 100.00 | GBP |
| HM-000006/0006 | | AleBak 01 Company | AB_PL01 | 02/10/14 | 02/10/14 | 000006 | | | | STECUR | | N | 100.00 | GBP |
| HM-000006/0007 | | hal bevan suppliers | hal001 | 02/10/14 | 02/10/14 | 000006 | | | | STECUR | | N | 550.00 | GBP |
| HM-000006/0008 | | Zombie & Son | | 29/01/15 | 29/01/15 | 000006 | | | | zabkha | | N | 700.00 | GBP |
| HM-000006/0009 | | antshy company | ant_sup | 23/02/15 | 23/02/15 | 000006 | | | | coins | | N | 2,500.00 | GBP |
| HM-000006/0010 | | Acme Open Order Limited | ACM001 | 23/02/15 | 23/02/15 | 000006 | | | | alebak | | N | 1,000.00 | GBP |
| HM-000006/0015 | | antshy company | ant_sup | 22/07/15 | 22/07/15 | 000006 | | | | zabkha | | N | 2,500.00 | GBP |
| HM-000018/0004 | | Zombie & Son TEST | | 25/06/15 | 25/06/15 | 000018 | | | | zabkha | | C | 15.00 | GBP |
| HM-000018/0005 | | Zombie & Son TEST | | 25/06/15 | 25/06/15 | 000018 | | | | zabkha | | C | 15.00 | GBP |
| HM-1/0051 | | Zabulon Networks | ZAB001 | 20/11/14 | 20/11/14 | 1 | | | | NATANT | | N | 124.00 | GBP |
| HM-1/0074 | | Zabulon Networks | ZAB001 | 29/05/15 | 29/05/15 | 1 | | | | NATANT | | N | 1,775.00 | GBP |
| HM-1/0078kk | | .TESCO Supplies | TES001 | 01/01/15 | 01/01/15 | 1 | | | | NATANT | | N | 550.00 | GBP |
| HM-1/0088 | | AleBak 01 Company | AB_PL01 | 10/09/15 | 10/09/15 | 1 | | | | alebak | | N | 2.00 | GBP |
| HM-1/0089 | | AleBak 01 Company | AB_PL01 | 10/09/15 | 10/09/15 | 1 | | | | alebak | | N | 180.00 | GBP |
| HM-1/0091 | | AleBak 01 Company | AB_PL01 | 14/09/15 | 14/09/15 | 1 | | | | alebak | | N | 180.00 | GBP |
| HM-1/0092 | | AleBak 01 Company | AB_PL01 | 14/09/15 | 14/09/15 | 1 | | | | alebak | | N | 180.00 | GBP |
| HM-1/0094 | | Another Good Company for Crash Tests of Any sorts | AGC001 | 25/09/15 | 25/09/15 | 1 | | | | NATANT | | N | 207.20 | USD |
| HM-1/0096 | | Zoki, Bada & Co | ZOB001 | 26/10/15 | 26/10/15 | 1 | | | | NATANT | | N | 500.00 | GBP |

Each column has a triangle next to the name where a sort is available. You can only have one sort on each page.

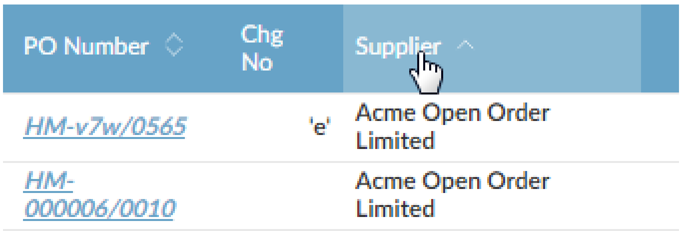

The heading of the column that is currently sorted is highlighted in a different colour, and the arrow shows whether the records are sorted in ascending or descending order. Other columns that can be sorted have a double arrow, and are highlighted when you move the mouse pointer over them.




1. To change the current sort from ascending to descending, click the column heading. In our example click the PO Number heading.




2. In our example screen, to change the sort from the PO Number column to the Supplier column, to select the Supplier heading.

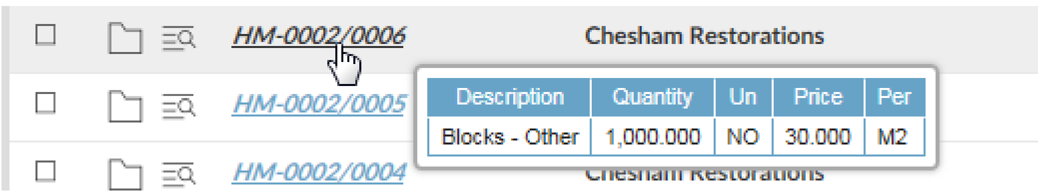



3. The sort order has changed so the records are sorted by supplier name, and the single arrow indicates the sort order.

### 4.5.1.3 Using Hyperlinks

Hyperlinks are available in Browse screen to be able to drill down to other modules, transactions and records. This is also known as dig deeper. The data used to drill down will be a key data field in the record or transaction.

When the data is underlined, there is a hyperlink attached to drill down to further information.



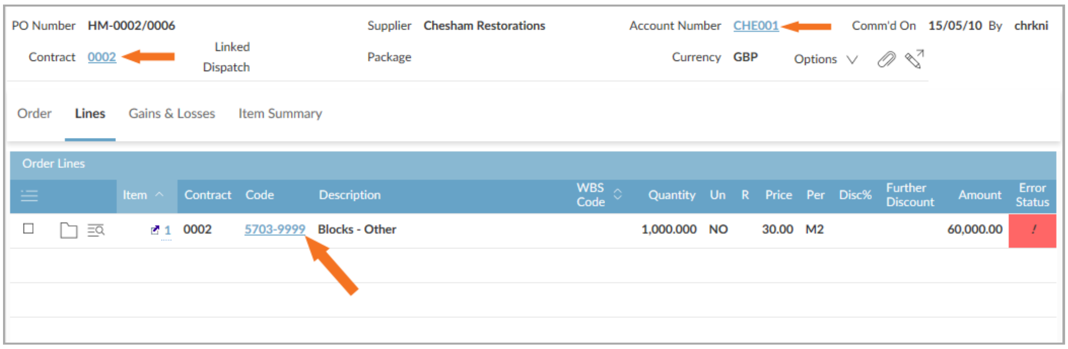

The tooltips will give you details of where you will drill down to.

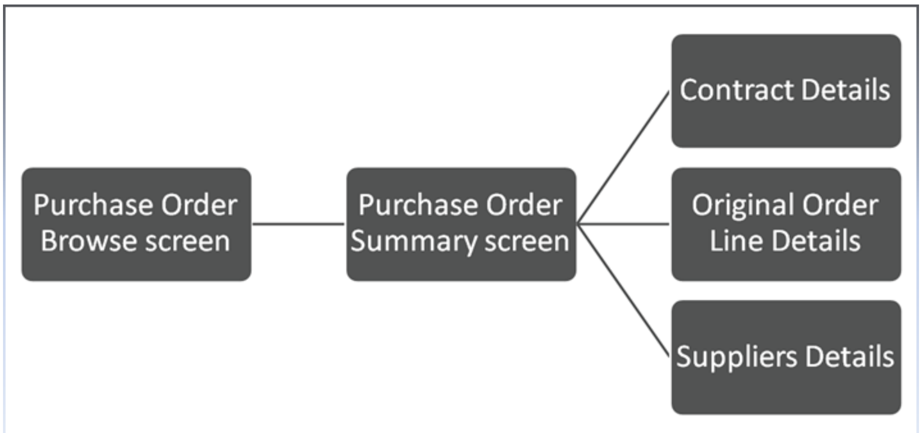
For example the Purchase Order Number hyperlink in the PO Number column will drill down to the Purchase Order Summary screen for that specific order.

1. Select the Purchase Order Number hyperlink in the PO Number column.

2. You will drill down to the Purchase Order Summary screen. The Purchase Order Number is the key data to open the record.

3. The hyperlinks are also available when using records and viewing details. From the Purchase Order Summary screen you can now drill down to three different records.



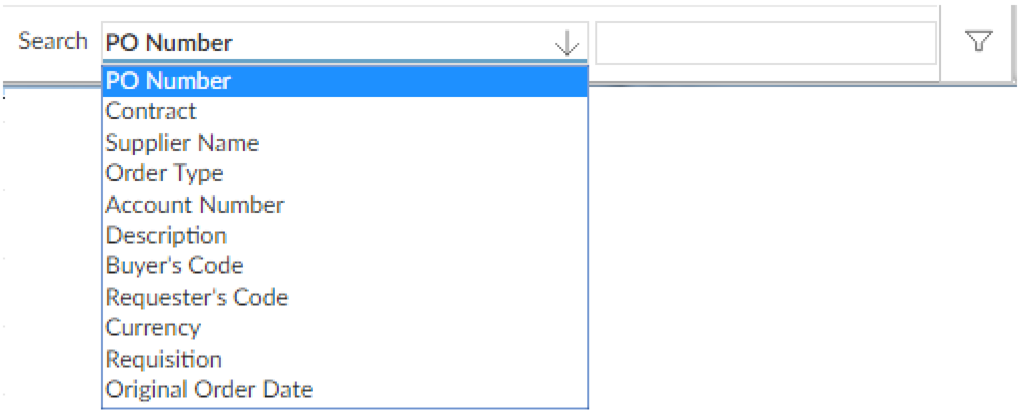




This means you can have a stepping stones effect by digging deeper on the initial Browse screen you can drill down to additional information.

You can use the Back and Forward buttons to move through the screens as you drill down through the various hyperlinks.

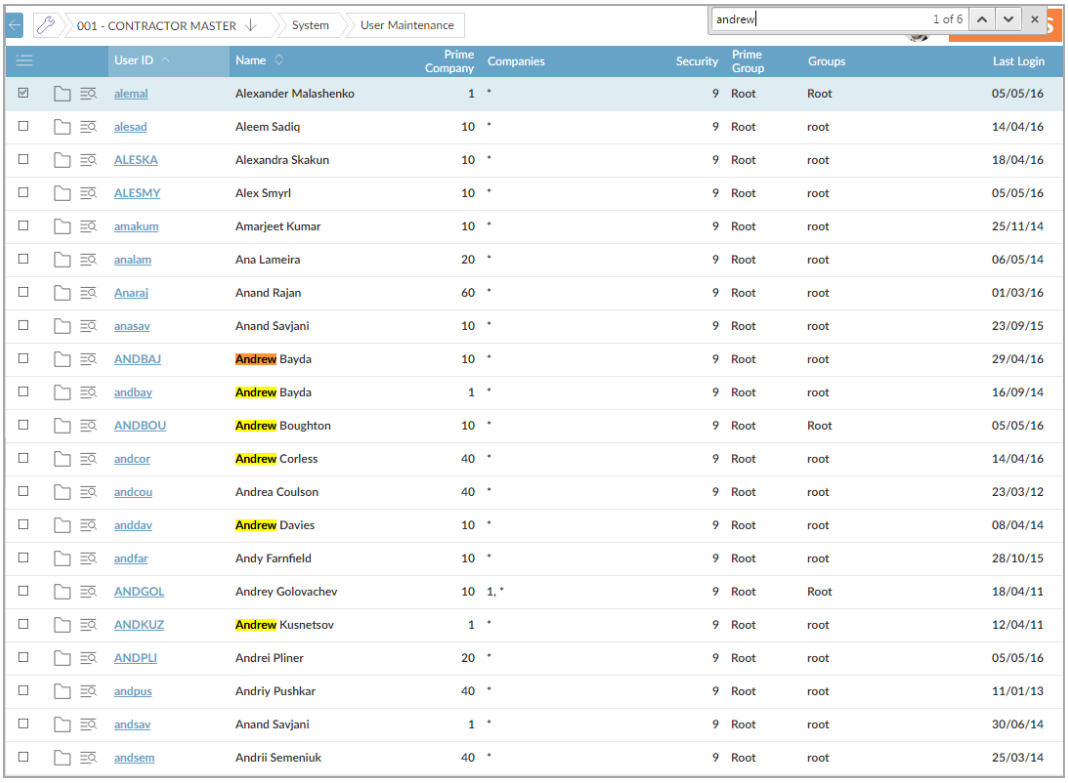
### 4.5.1.4 Search within the Browse Screen

The Search Field with the Browse screen relates to the Headings of the columns and will enable you to search the data based on the column headings.




This is the recommended way of searching for specific records. The list will be reduced to display only those records matching the search criteria.

If you are looking for specific information on the screen, for example, a User in the User Browse screen, you can hold the Ctrl key and press the F key, then type the word or words your are searching for.




| User ID | Name | Prime Company | Companies | Security | Prime Group | Groups | Last Login |
|---|---|---|---|---|---|---|---|
| alemal | Alexander Malashenko | 1 | * | 9 | Root | Root | 05/05/16 |
| alesad | Aleem Sadiq | 10 | * | 9 | Root | root | 14/04/16 |
| ALESKA | Alexandra Skakun | 10 | * | 9 | Root | root | 18/04/16 |
| ALESMY | Alex Smyrl | 10 | * | 9 | Root | root | 05/05/16 |
| amakum | Amarjeet Kumar | 10 | * | 9 | Root | root | 25/11/14 |
| analam | Ana Lameira | 20 | * | 9 | Root | root | 06/05/14 |
| Anaraj | Anand Rajan | 60 | * | 9 | Root | root | 01/03/16 |
| anasav | Anand Savjani | 10 | * | 9 | Root | root | 23/09/15 |
| ANDBAJ | Andrew Bayda | 10 | * | 9 | Root | root | 29/04/16 |
| andbay | Andrew Bayda | 1 | * | 9 | Root | root | 16/09/14 |
| ANDBOU | Andrew Boughton | 10 | * | 9 | Root | Root | 05/05/16 |
| andcor | Andrew Corless | 40 | * | 9 | Root | root | 14/04/16 |
| andcou | Andrea Coulson | 40 | * | 9 | Root | root | 23/03/12 |
| anddav | Andrew Davies | 10 | * | 9 | Root | root | 08/04/14 |
| andfar | Andy Farnfield | 10 | * | 9 | Root | root | 28/10/15 |
| ANDGOL | Andrey Golovachev | 10 | 1, * | 9 | Root | Root | 18/04/11 |
| ANDKUZ | Andrew Kusnetsov | 1 | * | 9 | Root | root | 12/04/11 |
| ANDPLI | Andrei Pliner | 20 | * | 9 | Root | root | 05/05/16 |
| andpus | Andriy Pushkar | 40 | * | 9 | Root | root | 11/01/13 |
| andsav | Anand Savjani | 1 | * | 9 | Root | root | 30/06/14 |
| andsem | Andrii Semeniuk | 40 | * | 9 | Root | root | 25/03/14 |

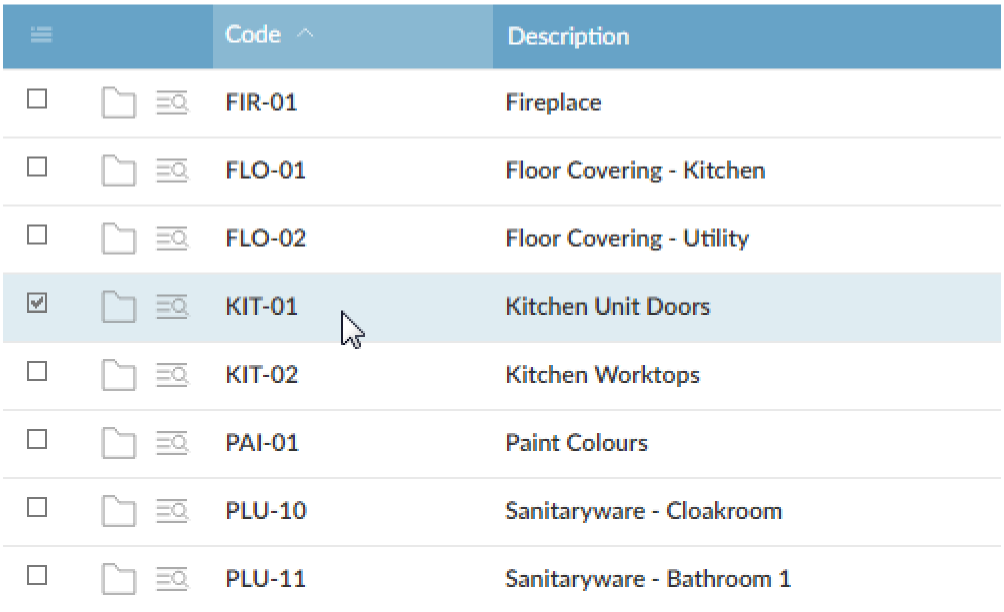
Every match will be highlighted with the Browse screen list.

## 4.5.2 Select Records

You can select several records from a browse screen, then carry out the same action on all of them (for example: delete them, or apply an action from the Action menu).

NOTE Some actions only work on a single record, and will display an error if you try to run the action for more than one record.

To select a single record, click anywhere on the record.

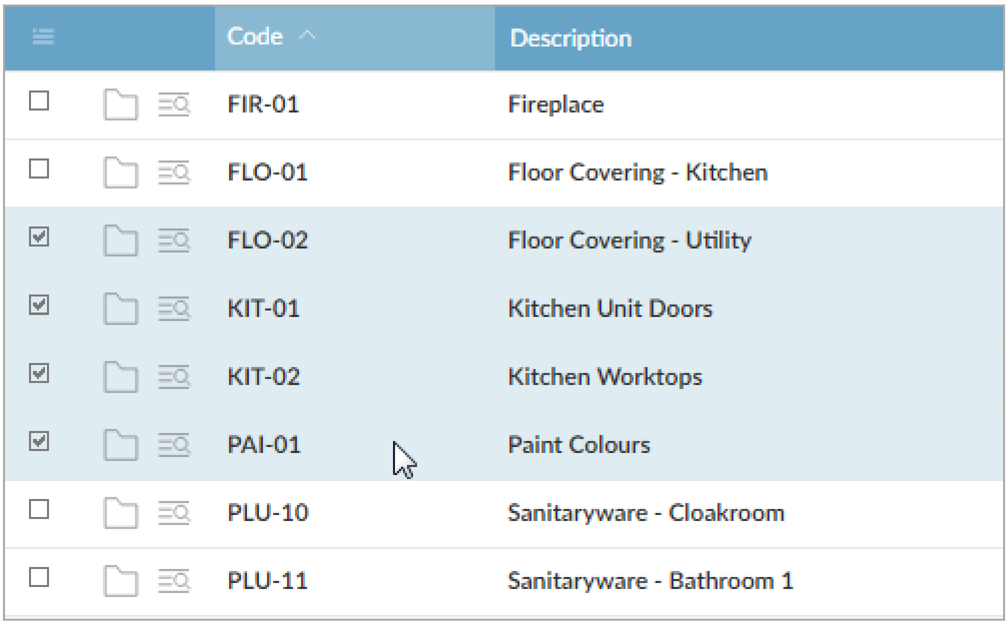


| Code | Description |
|---|---|
| FIR-01 | Fireplace |
| FLO-01 | Floor Covering - Kitchen |
| FLO-02 | Floor Covering - Utility |
| KIT-01 | Kitchen Unit Doors |
| KIT-02 | Kitchen Worktops |
| PAI-01 | Paint Colours |
| PLU-10 | Sanitaryware - Cloakroom |
| PLU-11 | Sanitaryware - Bathroom 1 |

### 4.5.2.1 Consecutive Records

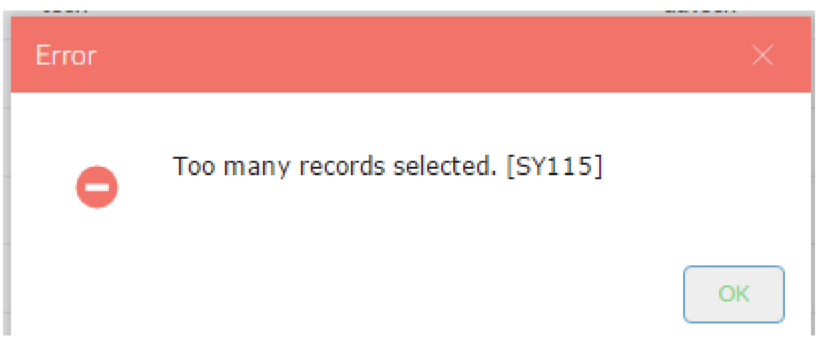
Selecting consecutive records will enable you to select a block of records or data lines in a table.

1. To select a block of consecutive records select the First record required and whilst holding the Shift key select the Last record. The block of records selected will be highlighted.




2. If you select the wrong block of records, select the First record again, as this will remove the Tick box selection from the others.

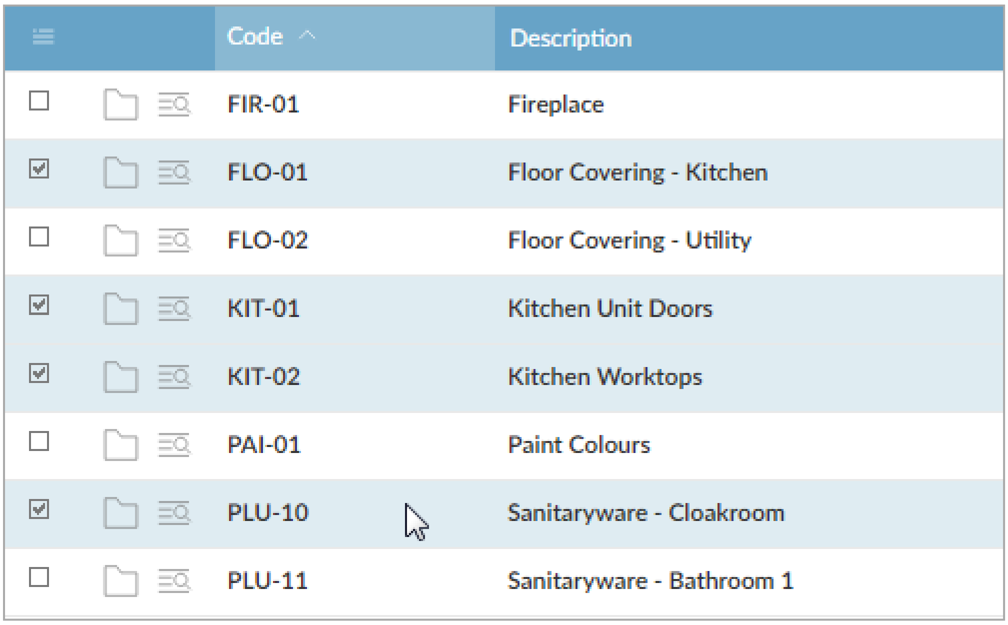
3. If you select too many records, a message will be displayed stating "Too many records selected". Select the OK button and you may need to look at applying filters or reduce your selection.




### 4.5.2.2 Non-Consecutive Records

Selecting non-consecutive records will enable you to select specific records across pages rather than a block of records.

1. To select specific records hold the Ctrl key and select the Individual records required. The records selected will be highlighted.

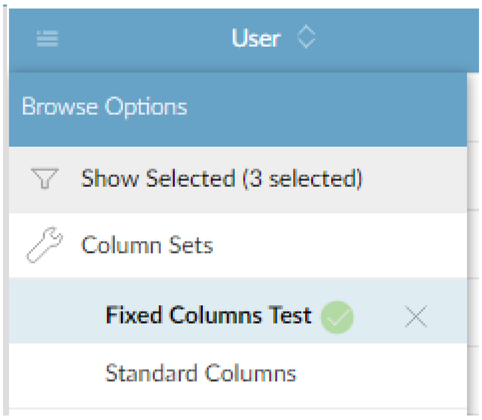



2. If you select the wrong record, select the record again, as this will remove the Tick box selection.

3. You can continue to select across the pages, remembering to hold the Ctrl key.

### 4.5.2.3 Selected Filter

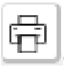
1. To see how many records you have selected, move the mouse pointer over the browse menu button. The menu shows the number in brackets.

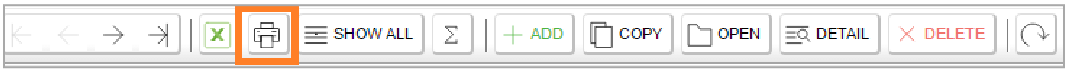



2. Select the Show All option and only the selected records will be displayed.

3. To show all records, click select the Show All option.

## 4.5.3 Print the Records

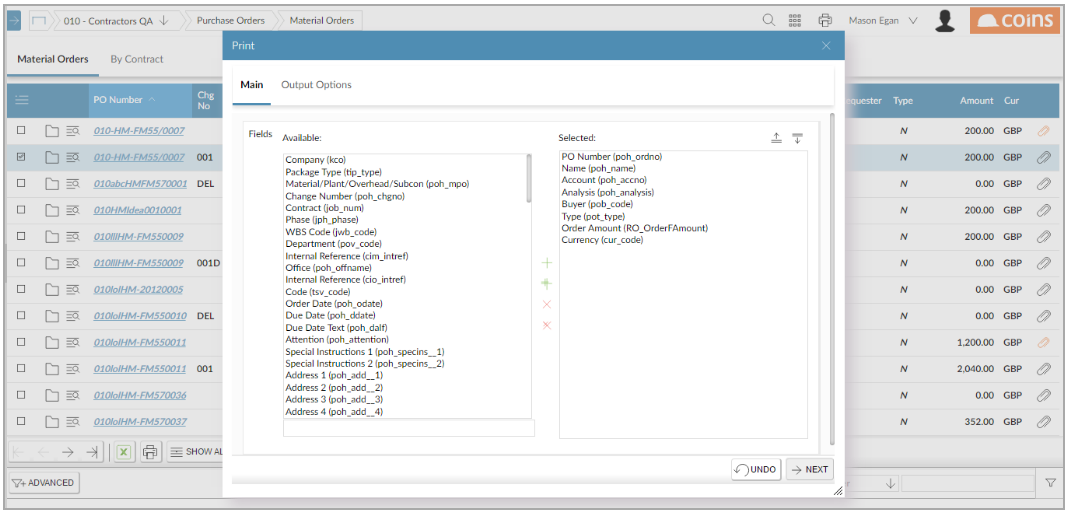
Most Browse screens will have the facility to print the records. These screens are easily identified by the Print button  on the toolbar.




The Print button will print all the records displayed in the Browse screen. However it will also have more information available to print. Any additional drill down and dig deeper hyperlink data or information can also be included to the print.

1. Locate the records you wish to include in the print. Once they are all selected, select the Print button.

2. A new window will be displayed which has two main fields available to create the print, Available and Selected.




3. There are more fields listed under the Available field, as this will be looking at the main table of information. The predefined selected field has the main information you may require for the print.

## 4.5.4 Exporting Data to Excel

Most browse screens allow the option to export the records to an Excel spreadsheet.

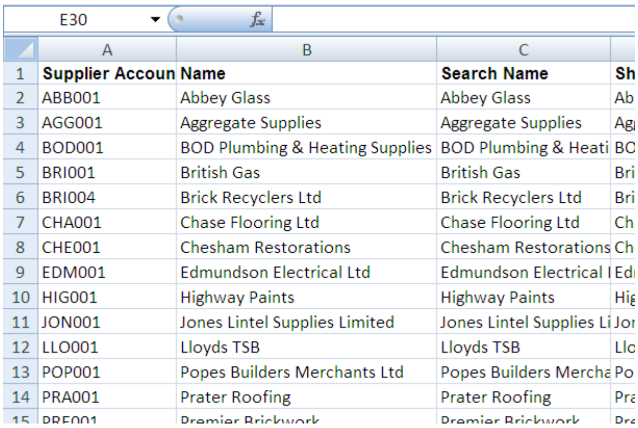
#### 4.5.4.1 To export all Records

1. Locate the Browse screen you require.  Make sure no filters are applied

2. Select the Export button at the bottom of the screen. A message will be displayed asking “Do you want to open or save this file?”.


3. Select the button you require. The Open button will display the information on the screen, alternatively the Save button will enable you to save the data file on your network drive.

4. In this example we will select the Open button.



| | A | B | C | |
|---|---|---|---|---|
| 1 | Supplier Accoun | Name | Search Name | Sh |
| 2 | ABB001 | Abbey Glass | Abbey Glass | Ab |
| 3 | AGG001 | Aggregate Supplies | Aggregate Supplies | Ag |
| 4 | BOD001 | BOD Plumbing & Heating Supplies | BOD Plumbing & Heati | BO |
| 5 | BRI001 | British Gas | British Gas | Bri |
| 6 | BRI004 | Brick Recyclers Ltd | Brick Recyclers Ltd | Bri |
| 7 | CHA001 | Chase Flooring Ltd | Chase Flooring Ltd | Ch |
| 8 | CHE001 | Chesham Restorations | Chesham Restorations | Ch |
| 9 | EDM001 | Edmundson Electrical Ltd | Edmundson Electrical I | Ed |
| 10 | HIG001 | Highway Paints | Highway Paints | Hig |
| 11 | JON001 | Jones Lintel Supplies Limited | Jones Lintel Supplies Li | Jor |
| 12 | LLO001 | Lloyds TSB | Lloyds TSB | Llo |
| 13 | POP001 | Popes Builders Merchants Ltd | Popes Builders Mercha | Po |
| 14 | PRA001 | Prater Roofing | Prater Roofing | Pra |
| 15 | PRE001 | Premier Brickwork | Premier Brickwork | Pre |

5. The data can be filtered, amended or changed as required.

| Note |
|---|
| The data is not linked to the COINS Database as the records have been exported outside COINS. |

#### 4.5.4.2 To export selected records

1. Locate the Browse screen you require.

2. Select the records you want to export, select the Selected Filter and then select the Export button.

3. Alternatively, use the filters so that only the records you want to export are included, then select the Export button.

# 4.6 Field Types

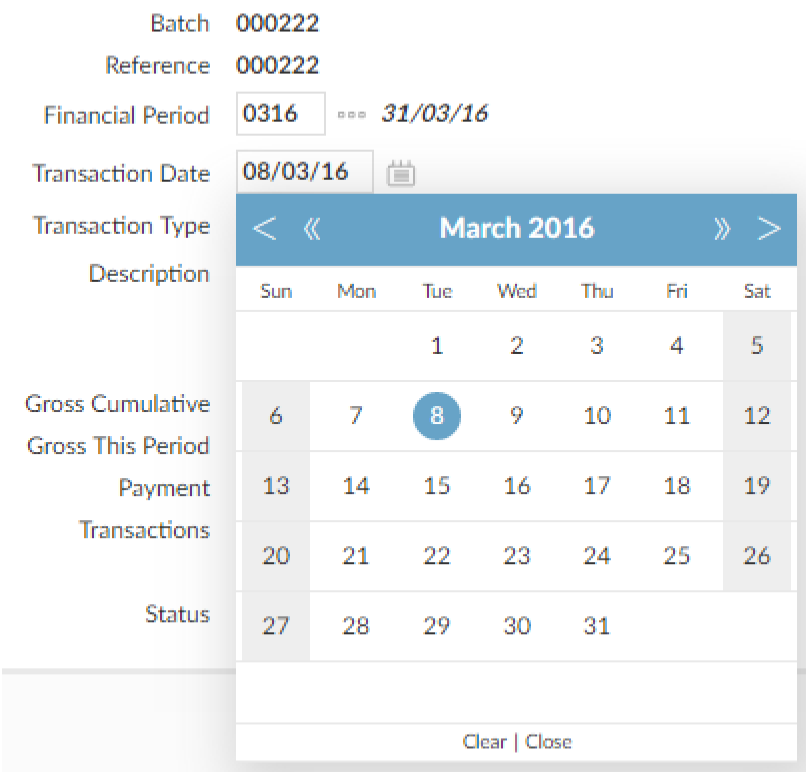
There are several field types available within COINS. Each field type has its own character and in this section we will explain how to use the different field types.

## 4.6.1 Date Fields

Date fields enable you to input dates in the correct format. Each date field will have a Calendar icon to enable you to look up the date and select direct from the calendar.

When the calendar is displayed it will highlight today's date.

1. Select the date you required by moving the cursor over the date. You will notice the date box will be highlighted as you move the cursor across the dates.




2. Select the date you require and this will automatically populate the field and close the calendar window.

3. Use the double arrows on the left to change to the same month in the previous year, or the double arrows on the right to change to the same month in the next year.


4. Select the single arrow on the left will change to the same month in the previous month while the single arrow on the right will change to the next month.

Dates are formatted to be dd/mm/yyyy or mm/dd/yyyy. This is defined in your user preferences.

| Quick Tips |
| --- |
| Enter DD and select the Return key. This is a day in the current month of the current year.<br><br>Enter DDMM and select the Return key. This is a specific date in the current year. |

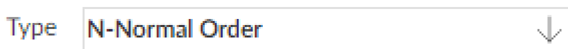
### 4.6.2 Lookup and Dropdown Selection Fields

Lookup fields are available to assist you in selecting the right data when inputting. There are dropdown buttons, lookup buttons and predictive filters available when using these fields.

#### 4.6.2.1 Dropdown List Fields

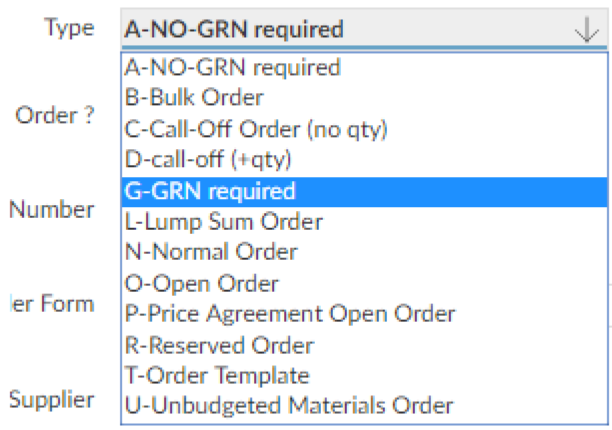
You must use the dropdown lists for selecting the right data to be entered into the field. You are unable to input the data manually into the field. It has to be populated from the dropdown list.

1. Select the Dropdown Arrow on the right of the field.



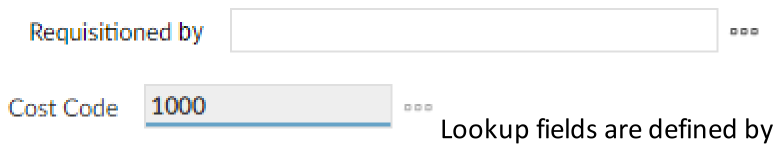

2. This will display a list of valid data to select to populate the field. Move the cursor over the line required and select. This will close the list and automatically populate the field with the selected data.

Only one selection can be made. You cannot type into the field therefore the data you require must be on the list. However if the information you require is not shown on the list, contact your system administrator.




3. If the field shows <Select> as input this Dropdown field is mandatory and you must select from the list. You will not be able to save the record if you have not made a selection.

### 4.6.2.2 Lookup Fields



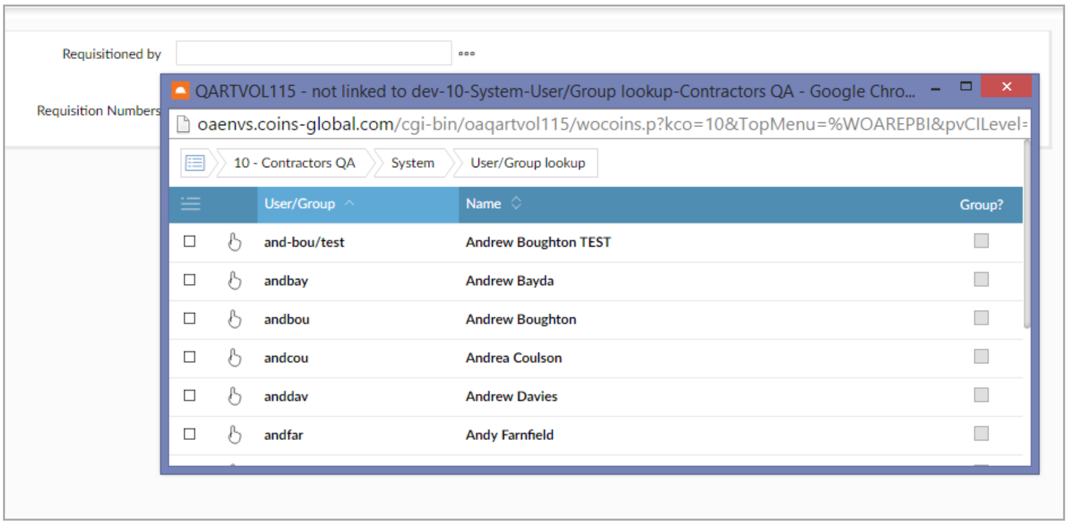

Lookup fields are defined by the Three Dots (Lookup) button at the end of the field. If you move the mouse pointer over the Lookup button the Text Box tooltip will show it is a Lookup Field.

These fields are linked to relevant tables with COINS, for example the Supplier field is linked to the Company Table to view the Supplier's list. (This is where the filters are useful to restrict the list to Suppliers only)

The tables linked to Lookup fields are a list of records matching the input required and therefore can be added to if the specific record is not in the list. For example a supplier, a subcontractor, a specific plant item etc.

1. Select the Lookup button on the right of the field.

2. This will display the table listing valid data to populate the field.



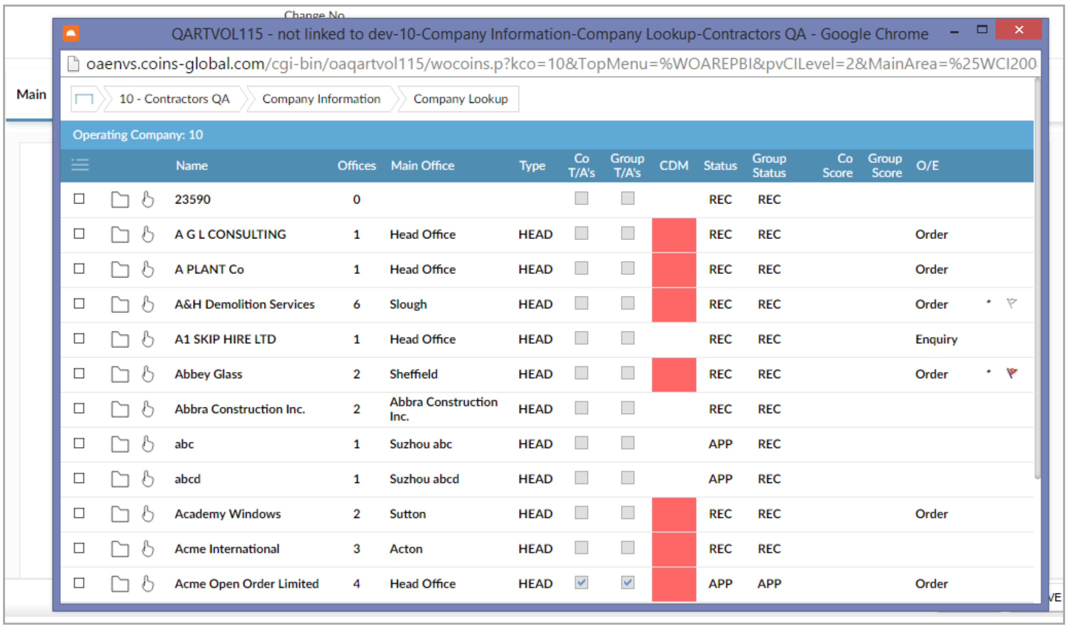

3. Locate the data you require and select the Select  button adjacent to the line. This will close the list and automatically populate the field with the selected data.

### 4.6.2.3 Lookup Fields That are Linked

Lookup fields can be linked together, which will automatically provide filters to the data for the second field.


These are usually together on the screen and in the example will have a description adjacent to the field (Supplier Account not Present). This means you must select the Supplier first for the filter to be applied.

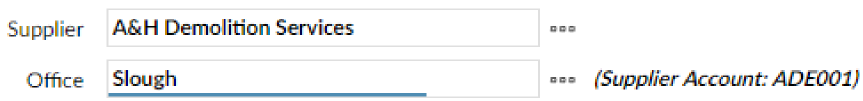
1. Select the Lookup button on the right of the field.




| Name | Offices | Main Office | Type | Co T/A's | Group T/A's | CDM | Status | Group Status | Co Score | Group Score | O/E |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 23590 | 0 | | | | | | REC | REC | | | |
| A G L CONSULTING | 1 | Head Office | HEAD | | | | REC | REC | | | Order |
| A PLANT Co | 1 | Head Office | HEAD | | | | REC | REC | | | Order |
| A&H Demolition Services | 6 | Slough | HEAD | | | | REC | REC | | | Order |
| A1 SKIP HIRE LTD | 1 | Head Office | HEAD | | | | REC | REC | | | Enquiry |
| Abbey Glass | 2 | Sheffield | HEAD | | | | REC | REC | | | Order |
| Abbra Construction Inc. | 2 | Abbra Construction Inc. | HEAD | | | | REC | REC | | | |
| abc | 1 | Suzhou abc | HEAD | | | | APP | REC | | | |
| abcd | 1 | Suzhou abcd | HEAD | | | | APP | REC | | | |
| Academy Windows | 2 | Sutton | HEAD | | | | REC | REC | | | Order |
| Acme International | 3 | Acton | HEAD | | | | REC | REC | | | |
| Acme Open Order Limited | 4 | Head Office | HEAD | ☑ | ☑ | | APP | APP | | | Order |

2. This will display the table listing valid data to populate the field.

3. Locate the data you require and select the Select button adjacent to the line. This will close the list and automatically populate both fields with the selected data. You will notice from our select (Acme Plant Hire) they only have one office. In this example COINS will automatically populate the Office field as well.




4. However in some cases you may have to select the second field details as there could be more than one option. For example, if a supplier has more than one office; selecting the Supplier, the Office field will not auto-populate and will still require the user to select the Lookup button.

5. However you will have a filter already in place relating to the Supplier you selected. Only the related offices for the specific supplier will be listed.

Company A&H Demolition Services

| | Office | Type | Telephone | Trading As | VT | VC | Co Score | Group Score | PL Account |
|---|---|---|---|---|---|---|---|---|---|
| ☐ | Slough | HEAD | | | ☑ | ☐ | | | ADE001 |
| ☐ | North Watford | REG | | | ☐ | ☐ | | | ADE005 |
| ☐ | BEDFORD | BRANCH | | | ☐ | ☐ | | | ADE002 |

6. Select the Select button to populate the field and close the table.

### 4.6.2.4 Multiple Lookup Field

When using Lookup fields you may have a requirement to select more than one line of data. For example, you may want to search for contracts for a number of locations.

| | From | To | Matches |
|---|---|---|---|
| Contract | | | * |

1. Select the Lookup button on the field. This will display the table of values and data.

| | Contract Number | Name | Contract Group |
|---|---|---|---|
| ☐ | 000622 | Jewel of The Creek | WEST-West contracts |
| ☐ | 10000 | Penny Hill Estates | 00-Sector 00 |
| ☐ | 1001 | Bovis Test | 00-Sector 00 |
| ☐ | 100125 | example | 00-Sector 00 |
| ☐ | 100126 | example | 00-Sector 00 |
| ☐ | 100127 | example | 00-Sector 00 |
| ☐ | 100128 | example | 00-Sector 00 |
| ☐ | 100129 | example | 00-Sector 00 |
| ☐ | 100130 | example | 00-Sector 00 |
| ☐ | 100131 | example | 00-Sector 00 |
| ☐ | 1002 | Bovis Test2 | 00-Sector 00 |
| ☐ | 1004 | Little Aston Park | 00-Sector 00 |

2. Select the multiple records you require using the Tick Box adjacent to each record, using the block selection or specific selection.

| | Contract Number | Name | Contract Group |
|---|---|---|---|
| ☑ | 000622 | Jewel of The Creek | WEST-West contracts |
| ☐ | 10000 | Penny Hill Estates | 00-Sector 00 |
| ☑ | 1001 | Bovis Test | 00-Sector 00 |
| ☐ | 100125 | example | 00-Sector 00 |
| ☑ | 100126 | example | 00-Sector 00 |
| ☐ | 100127 | example | 00-Sector 00 |
| ☑ | 100128 | example | 00-Sector 00 |
| ☑ | 100129 | example | 00-Sector 00 |
| ☐ | 100130 | example | 00-Sector 00 |

3. Select the Return Selected button at the bottom of the table. This will return all the records ticked.


You cannot use the Select button adjacent to the line, as this will only select the one line.

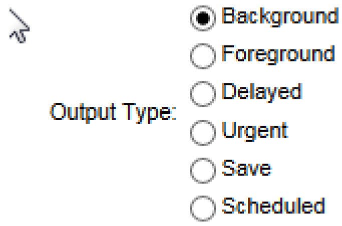

4. The table will close and all the selected information will be populated in the field, separated by commas.

## 4.6.3 Tick Boxes and Radio Buttons

Tick boxes and radio buttons are type of fields where no actual input is required. They just require to be selected.

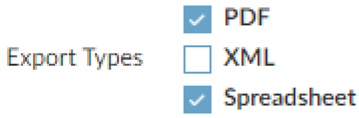
If selected it means = Yes, Include or Required.

Figure 15: Radio Buttons




Only one radio button can be selected per field.

Figure 16: Tick Boxes




You can select multiple lines or data when using tick boxes.

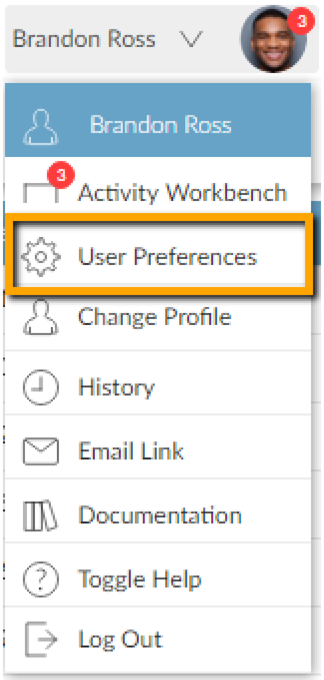
# 5 User Menu

The User Menu is a drop-down menu which is available when you move the mouse pointer over your display name. It gives you quick access to a number of functions:

## 5.1 User Preferences

User Preferences will enable you, as a User, to specify your preferences, for example your password, your filter types and your favourites. By changing your favourites, it will override the company settings. Some of the options we mention here may have been omitted from your User Profile, the settings associated with your User Id, so you may not access to them.

1. Select the User Preferences icon from the User Menu.

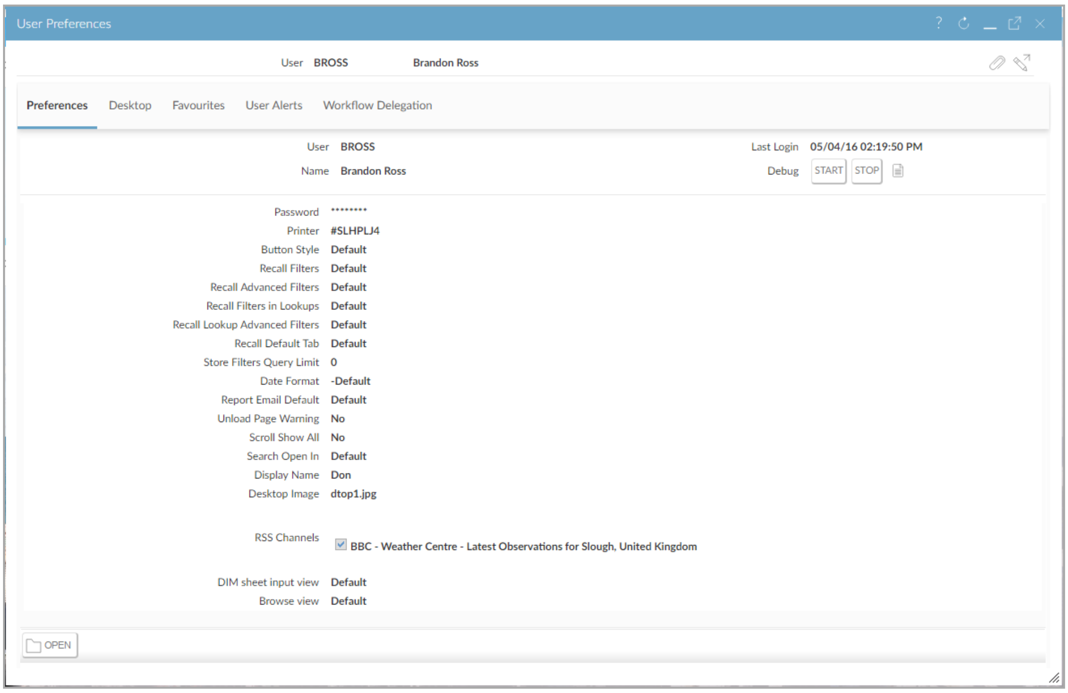



2. This will display the User Preferences screen.

### 5.1.1 Preferences Tab

The Preference tab enables you to amend your name within the system, in reports and enquiries that display your full name. This field may be restricted and would only require changing if you have changed your name, i.e. got married.

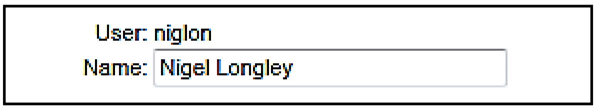
1. Select the Preferences tab to show the details.




2. Select the Open button to enable you to amend certain fields. The User Preference screen will display the fields available to be changed

### 5.1.1.1 Changing/Amending your Name

The Name field is available to change, for example: if someone got married. This can be changed at any time and will be reflected in reports, enquiries and description fields.



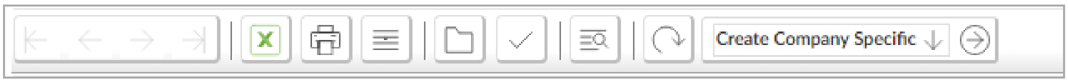

1. Enter the details of the new name and select the Save  button.

### 5.1.1.2 Change Button Style

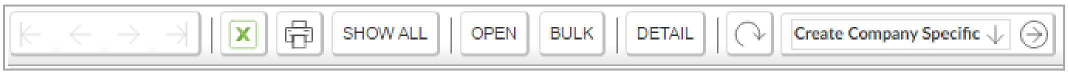
The style of the Buttons on pages will default to a preselected standard option set by your Administrator, however you may override these as follows:


Default - The Button will be displayed as set by the System Administrator

Icon - Buttons will display as Icons only. For example:




Text - Buttons will display as Text Only. For example:




Both - Buttons will display with Icons and Text. For example:


### 5.1.1.3 Change Filter Settings

Filters are available to be selected when using Browse screens, Reports and Enquiries. There are also different views of specific screens relating to these filter options.

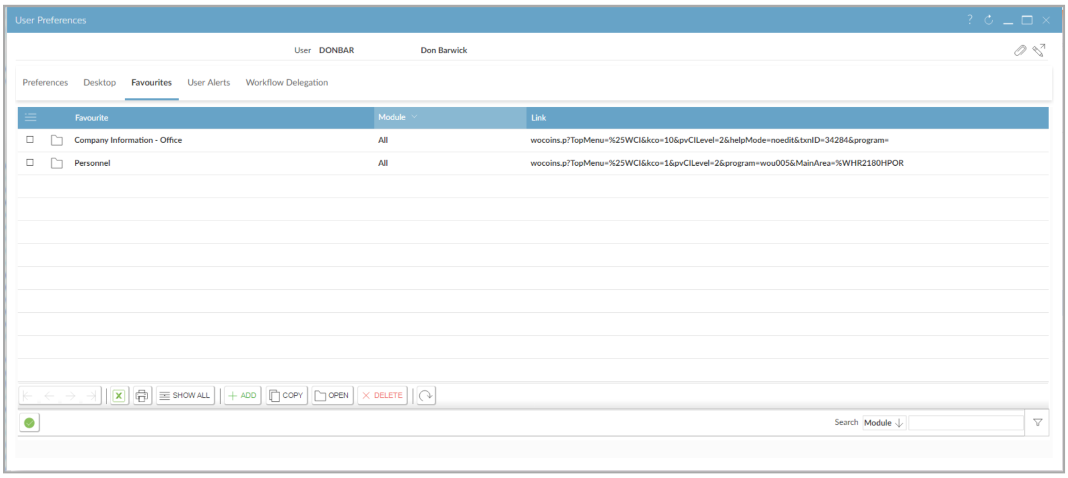
The filter settings are available to be changed. The company will have already preselected the standard options, however if the field is available you can override the option.

You can also set the reports to be sent to you via email as a default. This is only from the reports and not when the Print button is used.

## 5.1.2 Favourites Tab

The Favourites tab shows favourites you have set up in earlier versions of COINS. They are not really used any more; because you can add functions to your COINS Desktop. However, your existing favourites are still available on module home pages.

When selecting the favourite it will be opened in a new window.

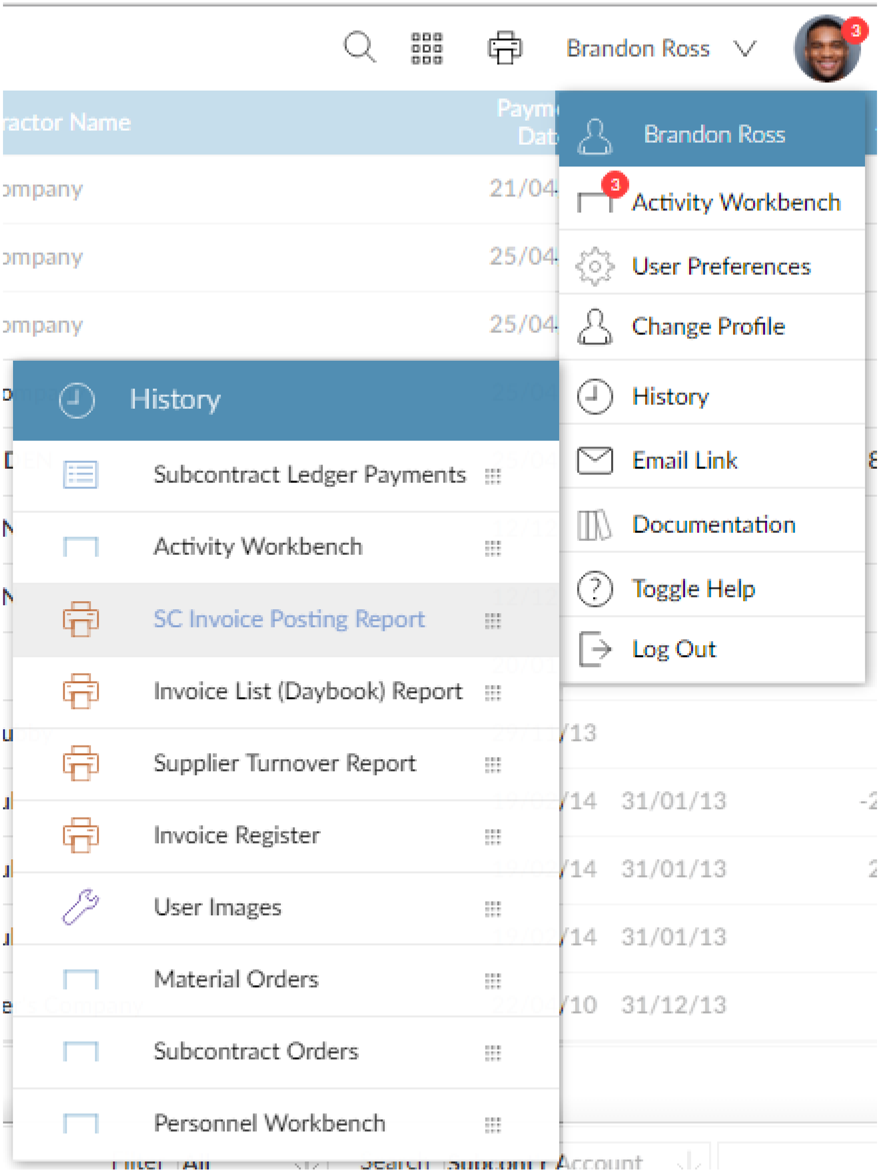


You can maintain the list of favourites from here if required.

## 5.2 History Menu

The History Menu is displayed when you move the mouse pointer over the History option on the user menu.

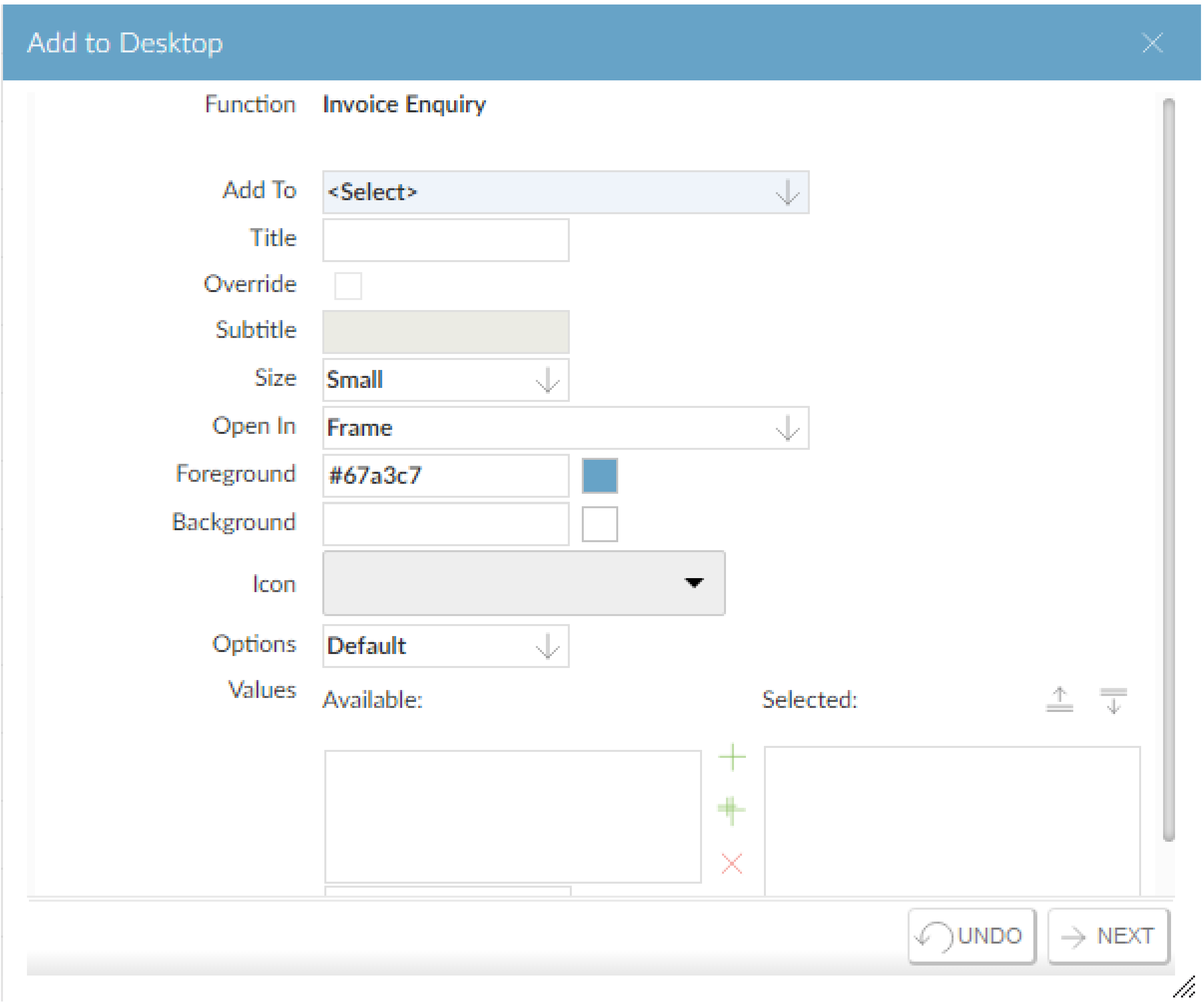
Figure 17: History Menu




It shows the ten COINS functions you have used most recently. You can click any of the links to go straight to that function.

If you have a Desktop configured, functions on the History menu have an "Add to Desktop" button next to them, which displays a dialogue that allows you to add the function to a selected section of their desktop, and to configure the behaviour and appearance of the tile.

**Figure 18: Add to Desktop Dialogue**

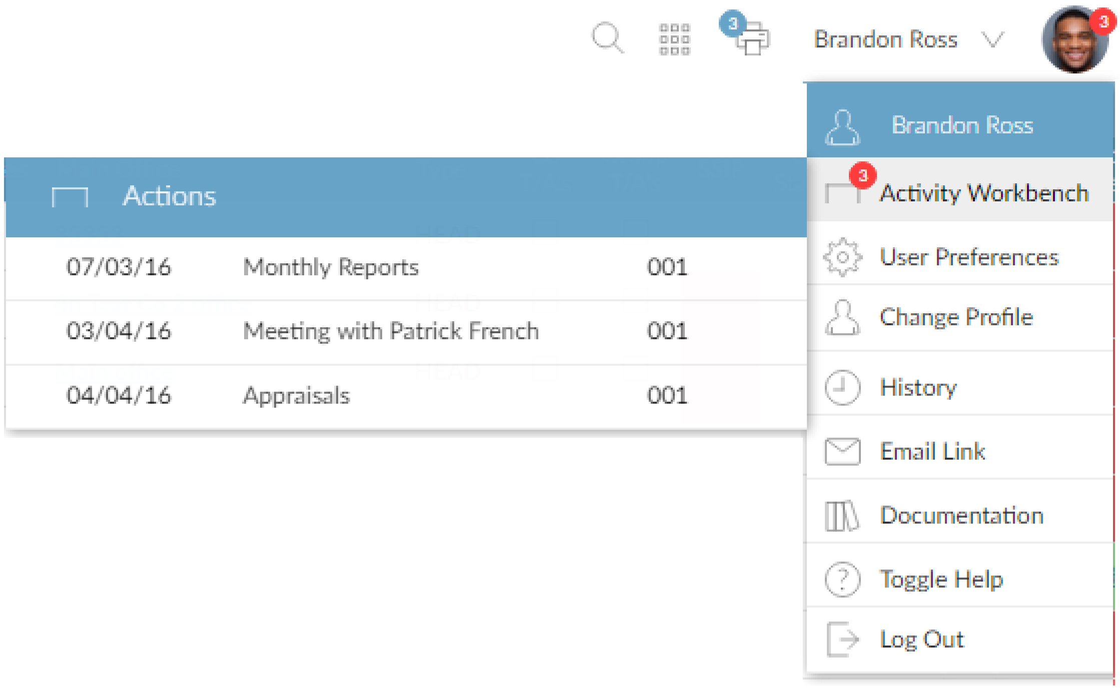



## 5.3 Activity Workbench

The Activity Workbench acts as a combined appointments diary and "to do" list. You can record activities (appointments or tasks) for yourself, or assign them to other users. Several programs throughout COINS can generate entries in the workbench automatically as a result of other processes. Activities are also called actions.

If new activities are assigned to you, the indicator on your profile picture (in the page header at the top of the screen) shows the number of activities:

If you have 10 or more new activities, the button shows !. If you move the mouse pointer over the image, the Activity Workbench popup menu shows the activities:




You can either:

- Click Activity Workbench on the user menu. This opens the ***Activity Workbench*** in a new frame.
- Click a link on the Actions menu. This opens that action in the ***Activity Workbench***.

The workbench has different views and various filters, allowing you to see, for example, all tasks and appointments for today, all new (unread) tasks and appointments, all outstanding tasks, multiple day view and other users' activities.

COINS highlights overdue activities in red.

COINS can update Microsoft Outlook® regularly with tasks and appointments from the Activity Workbench, so you can keep track of COINS activities and entries from outside COINS in the same place.

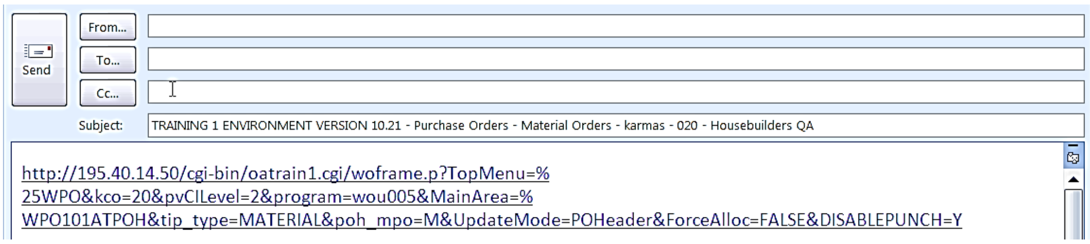
## 5.4 Email Link to This Page

When talking a specific Report or Browse screen through with another colleague in a different office, you may find it difficult to find the right screen. The facility to be able to email the URL or Page Address to them would be very helpful. You must be viewing the screen/page you want to send.

1. Locate the page you wish to email.

2. Select the Email Link option from the User Menu.

3. A new email will be displayed in a new window to enable you to add to the message. Add the email recipients you require. You can also amend the subject field for the email. Select the Send button.




4. The recipients can select the hyperlink to view the same screen/page.

| NOTE |
|---|
| The email recipient must have the User Profile access to view the page.<br><br>Any filters set by the sender to restrict the information, data and records in a browse screen or enquiry view will not be saved when emailing across the link. |

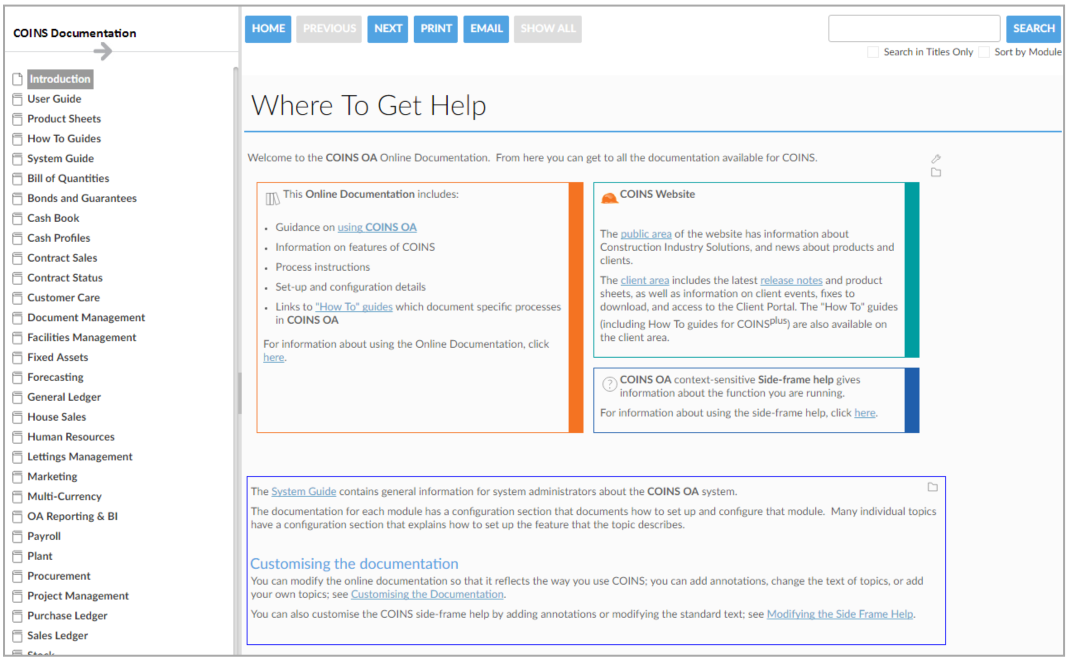
## 5.5 Online Documentation

The Online Documentation icon will enable you to view simple guides relating to the COINS system and modules.

The information available can be amended and changed to meet the business processes of each company and therefore will use company terminology rather than COINS-specific terminology.

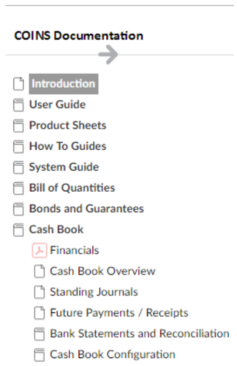
1. Select the Documentation option from the User Menu.

2. The Documentation screen will be displayed.



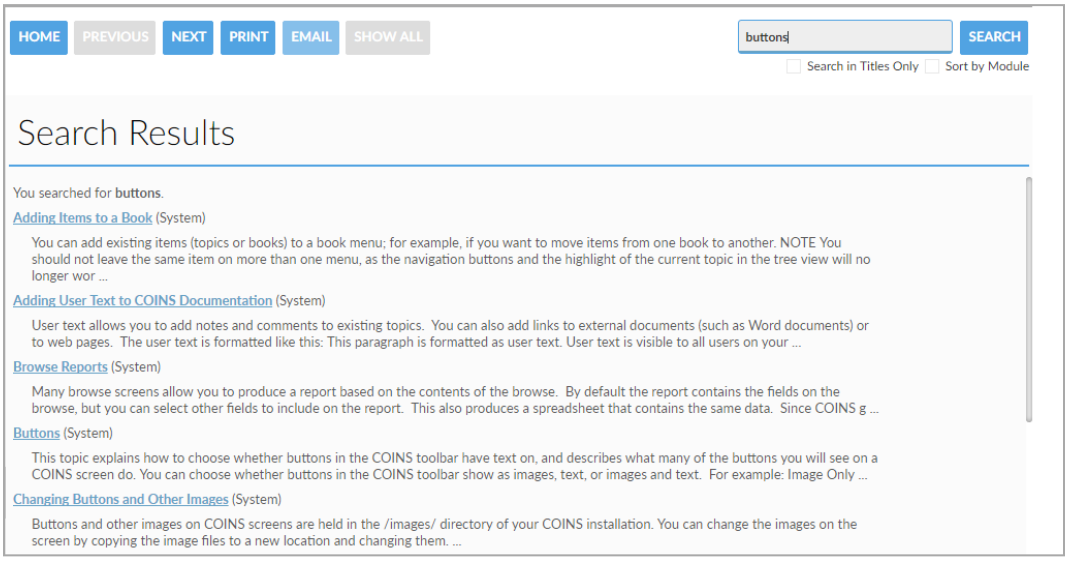

3. The menu on the left shows you the chapters of the guide and enables you to look for specific chapters. Select the Book icon to open the topics available under that chapter.

4. Select the topic that will enable you to read and review the guide.




There is a Search field available for you to search for specific words or phrases.

1. Enter your required search in the Search field and select the Search button, for example; for the search phrase "buttons".



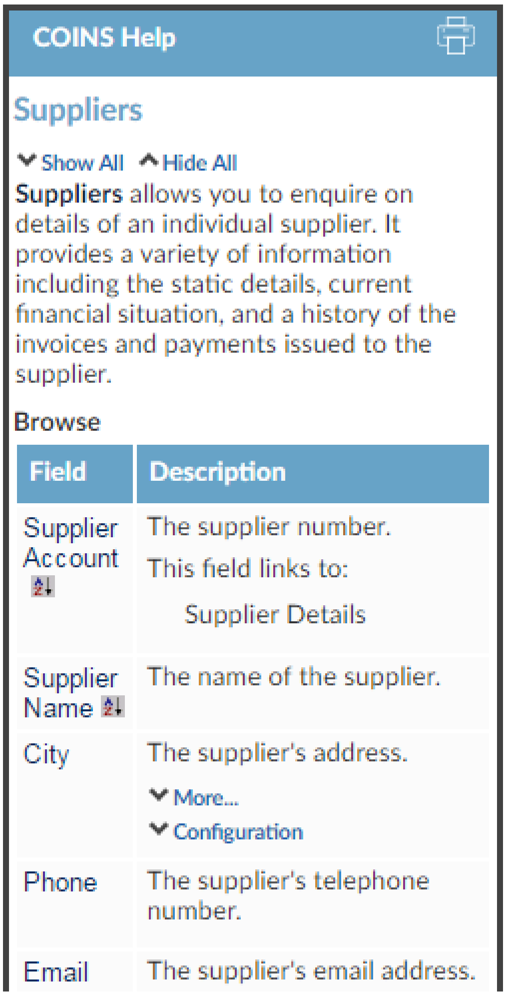

2. Your search results will be listed for each topic using the word or phrase you have entered.

3. Each Heading is a topic, explaining which module the information is held in and also the first few lines of the description. The heading will be underlined, showing there is a hyperlink attached to drill down into the article, if you select it.

## 5.6 Show Help

COINS OA features a help frame that shows information that relates to the function you are in. For example, the fields displayed in the main area are described in the Help, and if you navigate to other screens, the Help displayed relates to those.

To "turn on" the help, select Toggle Help from the user menu.




A typical layout of the Help would include the title of the function you are in, followed by a description of what the function does and what it can offer. Any extra information related to the function follows in the form of a link.

The next section of the Help describes fields in the function or workbench. If there are selectors, help for these is also displayed (selectors are usually drop down menus that require you to choose an option to tell COINS what sort of information you want to see or what you want to do).

If there is extra information related to a selector, field or function, you will see a link labelled More... Click this to view the information, and click it again to hide it.

You may also get extra information relating to configuration or parameters that affect the use or contents of a field or function; click the Configuration link to view these. To hide the configuration information, click the link again.

If there are any More... or Configuration links in the help you are looking at, there are also two links at the top: Show All and Hide All. Clicking Show All displays all additional information related to the screen you are in. Clicking Hide All hides the additional information.

### 5.6.1 Printing the help

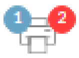
You can print out the side-frame help using the button at the top of the help frame.

# 6 Report Status Workbench

The ***Report Status*** workbench lists all reports requested. These will include any print requests and other background processes.

To go to the Report Status workbench, select the Report Status button  in the Page Header.

The Report Status icon shows two indicators:

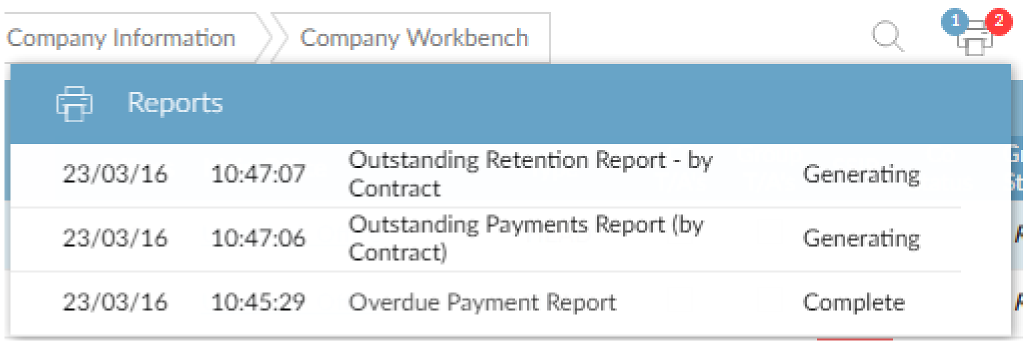



- The number of your reports that are currently generating is shown in a red circle.
- The number of your unread reports is shown in a circle of the theme colour.

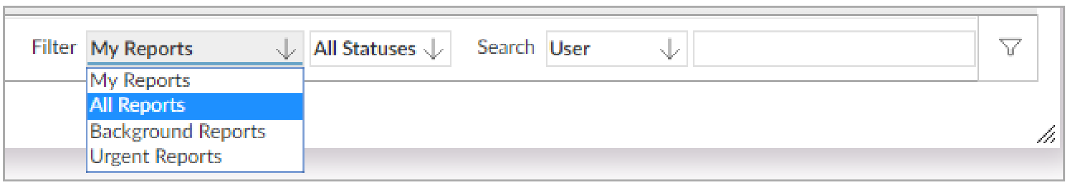
If 10 or more items are outstanding then ! is shown instead of the number.

The Unread Print Requests menu is displayed when you move the mouse pointer over the Report Status button. It shows any print requests you have not yet read or displayed. You can click any of the links to display the corresponding report output.

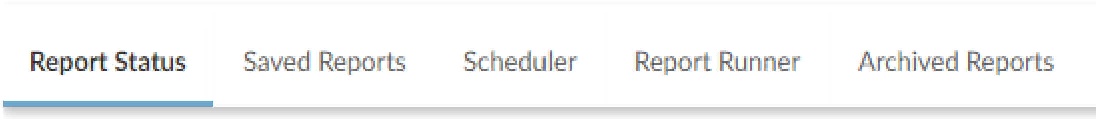
**Figure 19: Print Requests Menu**




You can filter the Browse screen to display just your reports, all reports and other filters.



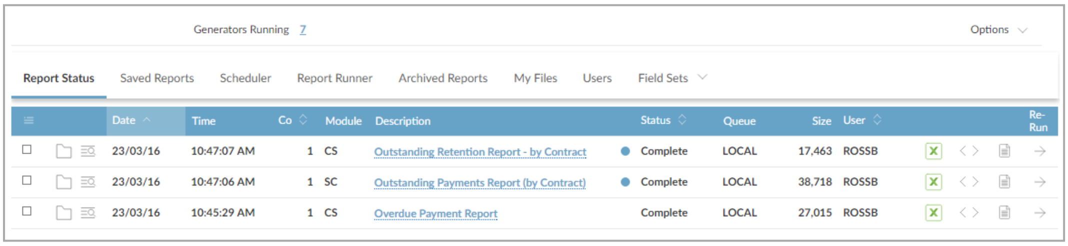
***Report Status Workbench*** has various tabs grouping similar output types together, i.e. saved reports and scheduled reports.




To view any reports select the Report Hyperlink in the Description column. The report will be displayed with the original data in a PDF format. You can also view the report in an Excel format by selecting the Excel button.

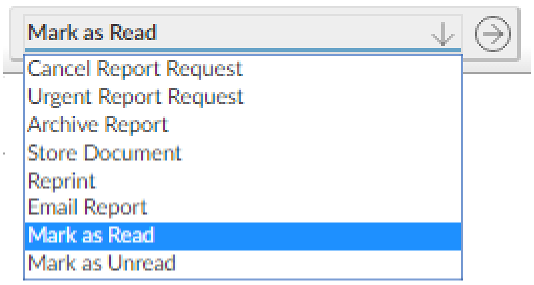
## 6.1 Report Status Tab

Report Status tab will display all reports and print outputs produced with any unread print requests marked with a coloured circle.




From here you may view the PDF (select the hyperlink), Excel , and XML outputs of the data. A log-file is also available which may indicate any issues encountered in running the report (for diagnostic and support purposes).

Two actions, Mark as Read and Mark as Unread, allow you to mark selected reports as read (without having to open the report) or unread.




If you have run a report you no longer require, you can delete it from the list:

- Select the lines for the reports you no longer require, then click the Delete button at the bottom of the page.

Alternatively if a report is showing as Generating or Waiting and you have no longer require it, you can stop the request.

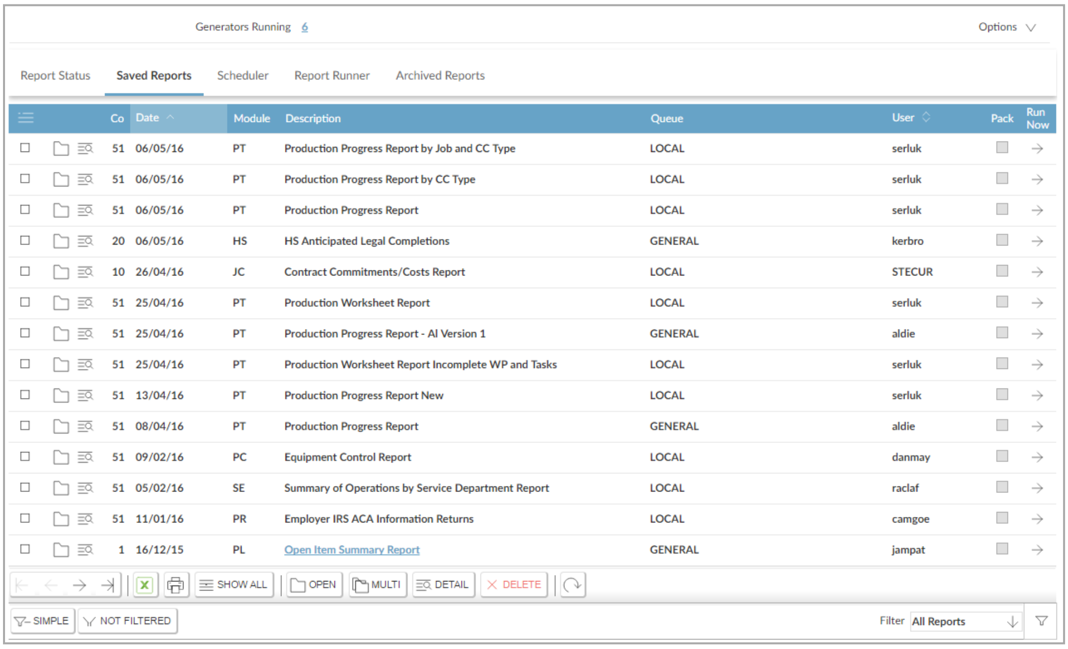
- Select the Cancel Report Request option from the Dropdown list. Select the Apply Action button.

You may wish to print more than one report from the list.

- Select the Print Report option from the Dropdown list. Select the Apply Action button. This will print all the reports on one PDF form.

## 6.2 Saved Reports

The Saved Reports tab all the reports you have saved with regards to the filters. It has not saved the data, only the filters.

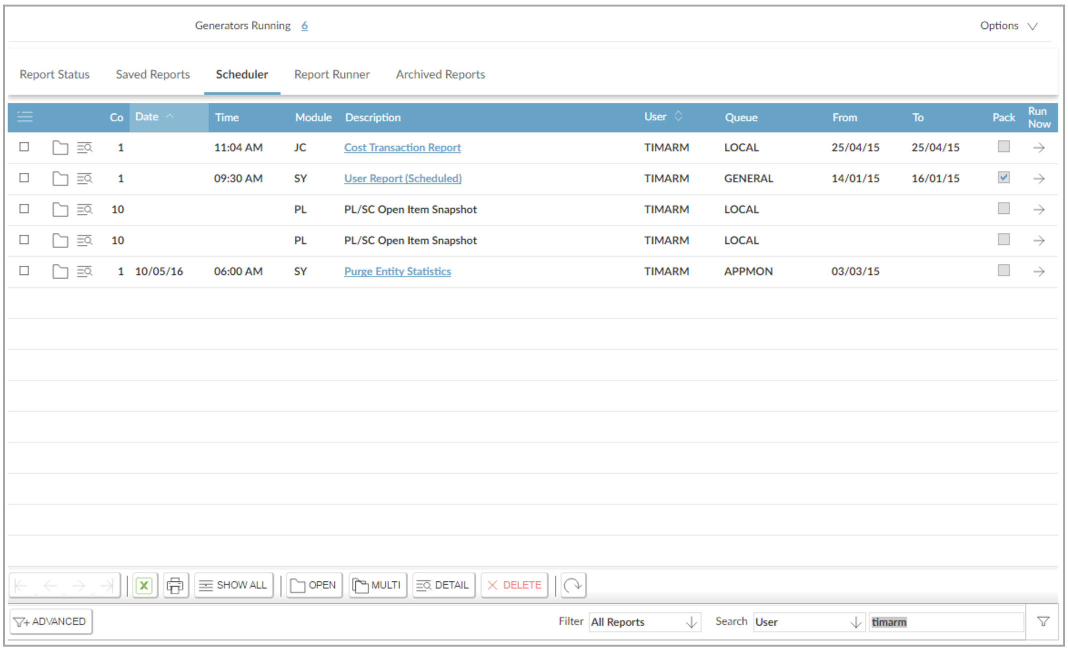



The report has not run and will be available in the Report Status workbench, under the Saved Reports tab for you to run. Select the Forward button under the Run Now column.

This tab will also be available to select on the specific reports.

## 6.3 Scheduler Tab

The Scheduler tab enables you to view all reports that have been scheduled to run, for example, every month end. These frequencies will have been predefined and only available for selection.

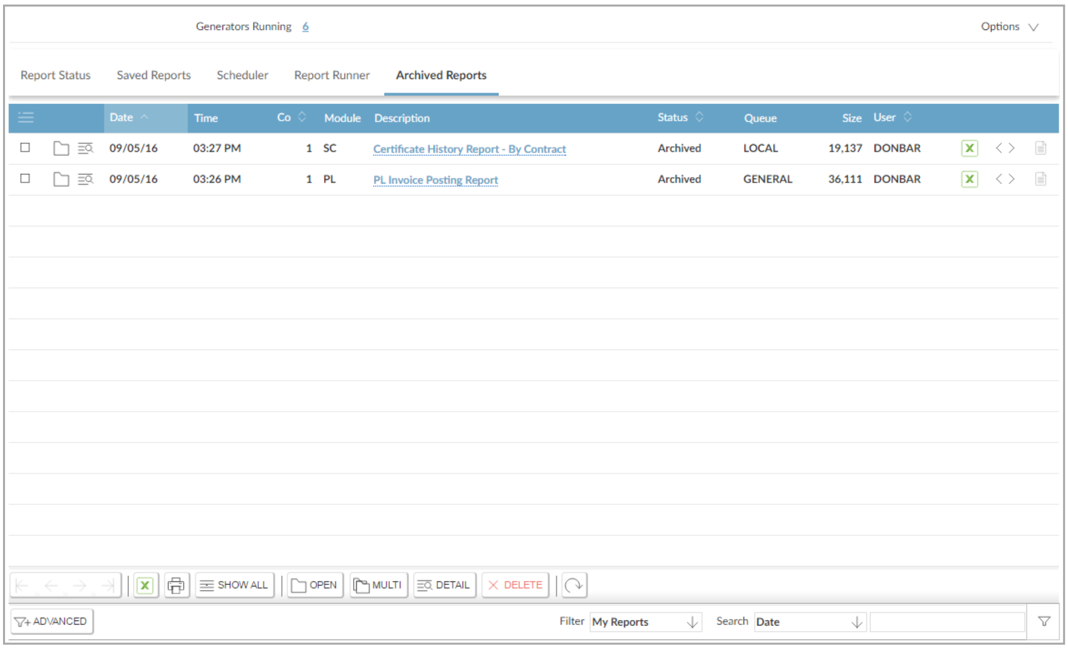



The list will show the date range when the report is required. This is not the frequency but the live date range; for example: every month from 1 January to 1 July.

You can also run these reports on an ad-hoc basis by selecting the Run Now button. All the filters will apply.

## 6.4 Archived Reports Tab

The Archived Reports is a list of all reports archived. These reports are filed in your Archive List and will not remain in the Report Status list. This will eliminate the potential of deleting the report.

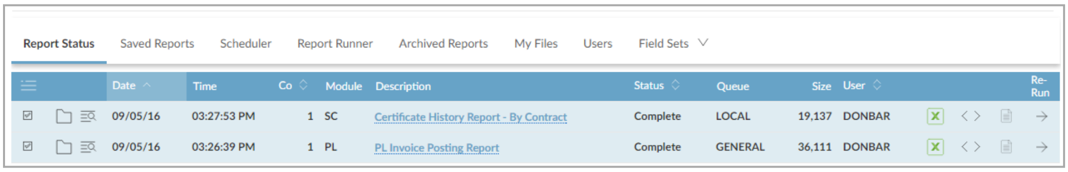



You can still use the report to view the data however you will not be able to re-run the report from here.

## 6.4.1 Adding a report to the Archived Report Tab

1. Locate the report you require to be archived on the Report Status Tab.

2. Select the report required. This will highlight the report. You can select more than one report to archive if required.




3. Use the Archive Report action from the dropdown list.

# 7 Filters

Filters enable you to reduce the list of records so view exactly the information you require. This applies to either reports or browse screens. You can also set the filters to look for a match of characters, including match case.

There are two types of filters available in the Browse screen, standard and advanced. Standard filters are related to the Search field, so you can specify which field to filter on. The Advanced filters will override any standard filters applied to a screen.

Your User Preference will define how you require your filters to be remembered. Go to Setting Filters in the User Preference section for more information.

A combination of filters can be used to display the results you require. However care when using multiple filters as you may have a contradiction so nothing is returned.

## 7.1 Standard Filters

When using filters it is recommended you only type part of words, or digits. If you are typing spaces, (for example, Merchant Limited), you must get the spaces correct. It is easier to filter on Merchant and use the wildcards.


This will return all the records where the name starts with Merchant. If you need to search Building Merchants, you would require a wildcard.

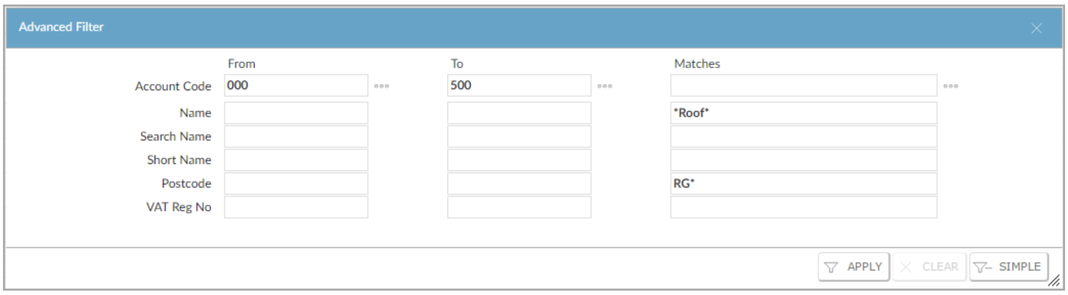
When you have entered your search criteria you must always select the Apply Filter  button. If you do not apply the filters the data will be returned in full with no filters applied.

## 7.2 Advanced Filters

Advanced filters are used if you want to show a specific list of records or results that match more than one search criteria. Advanced Filters override the Standard Filters.

Open the Advanced Filter using the Advanced Filter button 

at the bottom of a Browse screen. This displays a panel of fields appropriate to the browse screen you are displaying.




These are in three columns, From, To and Matches. When using more than one field to search, the system looks for a match on all fields, i.e. Contract Number range AND Order Date range AND Buyer's code.

Many of the fields have lookups available for you to select the specific search criteria you require for the information to be displayed. When you have entered your search criteria you must always select the Apply Filter button.

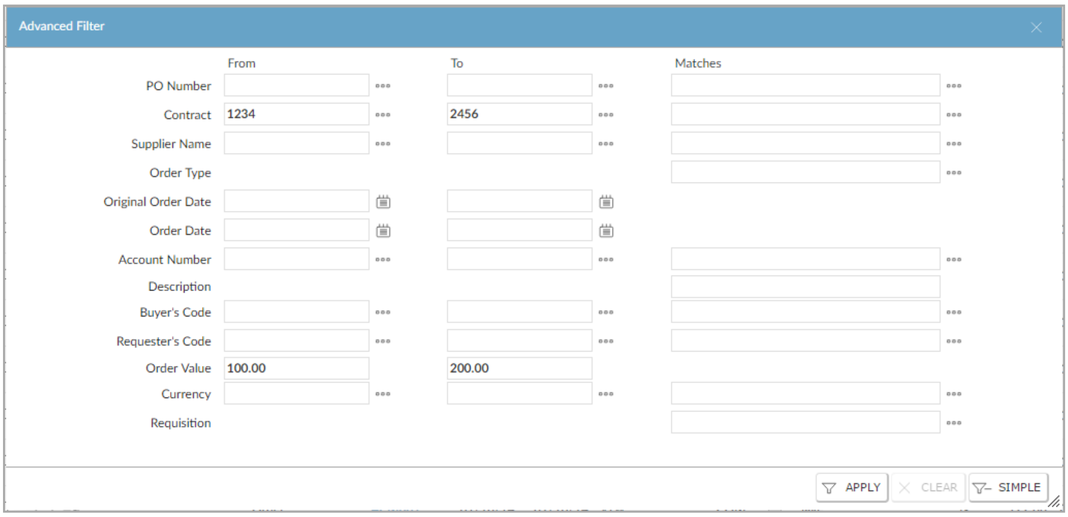
## 7.2.1 From and To

The From and To fields will enable you to search on a range of data, i.e. date range or a range of values. This would be looking for exact matches (as this would be entered in the Matches field). The From field will be the first value or starting point. The To field will be the last value or finishing point.

1. Enter the search criteria required in the relevant fields.

2. Select the Apply Filter button to display the required information and records.

**Figure 20: Applied Advanced Filters**




3. The screen will display all records meeting the search criteria and the screen will show the data has filters applied by the message Advanced Filter Applied.


4. If you wish to remove the filters, select the Clear Advanced Filter button  to the right of the Advanced Filter Applied message to clear all the filters entered. Select the Apply Filter button to refresh the data before you close the Advanced Filter panel.

### 7.2.2 Matches

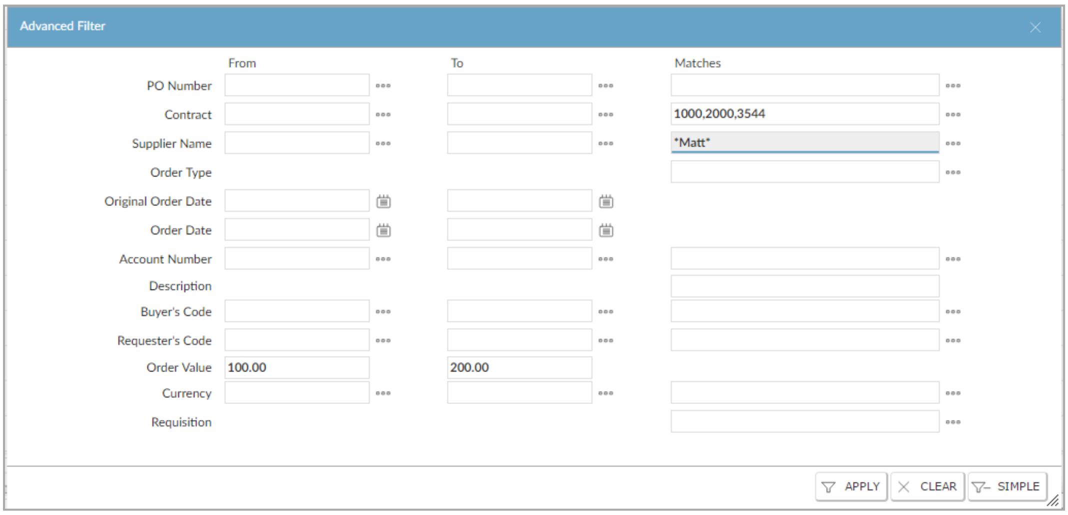
When using the Matches field you are looking for records with an exact match of data. This would not be a range (as this would be entered in the From and To fields).

When using the Matches field you can use any combinations of wildcard filters, such as asterisk, Comma, etc.

The Matches field will enable you to select non-consecutive data, except dates and values, as these are always ranges rather than specific values.

1. Enter the search criteria required in the specific fields.

**Figure 21: Applying Matches filters**




2. Select the Apply Filter button and the list of records will be refreshed with the new data matching your search.

3. Remove your filters from the fields when finished and apply, to refresh the data without having restrictions and filters.

## 7.3 Wildcards

There are various wildcards to use with standard or advanced filters in the match fields. Wildcards can also be used when restricting data in reports and some enquiries.

These can assist in reducing and filtering the data in the correct way to display the correct data, records and information you require.

You may wish to filter on a code that already has a symbol it the code, although setting up codes in this way is not recommended. For example you may wish to search on a range of category codes and your codes are configured using A-001 and A-002. Any symbols such as - , " ' all have a meaning and function within COINS, so these are not recommended to be used in addresses, codes and text. You will need to put these in quotes for the search to work, or prefix it with the \.

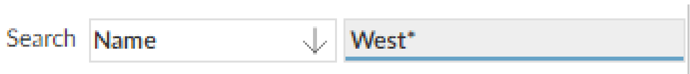
Practicing the filters is recommended so you can understand each feature and use the right wildcard for the right result. Also you may have used filters where a contradiction has occurred.

### 7.3.1 Using an * Asterisk to filter

Using an asterisk when filtering on a search will enable you to search on words, codes and values. Depending on where you place the Asterisk will return different results. This represents any string of characters.

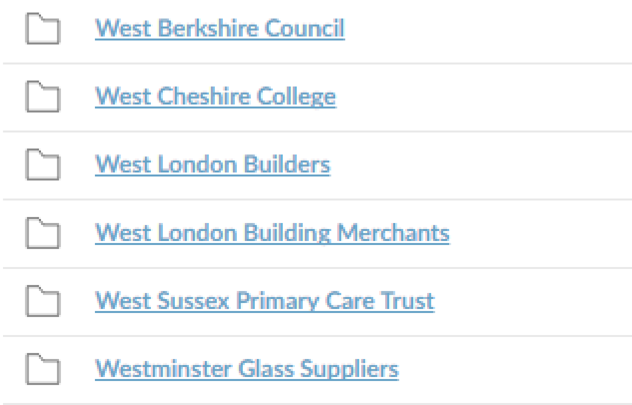
1. Enter West* in the Filter field.

Figure 22: The Filter West*




2. The filter is being used with the Search field on the Name column to return any records starting with West and have any other characters afterwards.

Figure 23: The Results of the Filter West*




### 7.3.2 Using a , Comma to filter

Using a Comma when filtering on a search will enable you to string codes, words and values together. The Comma is like saying “Either” or “Or” and can also be used in conjunction with the Asterisk.

An example of when to use this is to search on a number of contracts in the system to display the results in one list, rather than having to do a number of searches.

1. Enter 1001,1111,1119 in the Filter field.

Figure 24: The Filter 1001,1111,1119

2. The filter is being used with the Search field on the Contract Number column to return only these three contracts. This could be used when you want to all see the orders for these three specific contracts.

**Figure 25: The Results of the Filter 1001,1111,1119**

| | | Contract Number | Name |
|---|---|---|---|
| ☐ | | 1001 | Bovis Test |
| ☐ | | 1111 | Milton Keynes Building |
| ☐ | | 1119 | Material |

3. Commas and Asterisks can be used together. For example, this could be used when you want to view records where the contract number is incorporated in transaction numbers, for example Purchase Order numbers.

**Figure 26: Filters using both Commas and Asterisk**

Search PO Number *0026*,*0028*

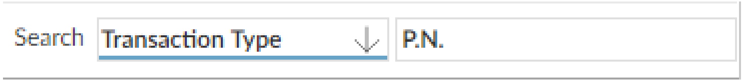
| | | | PO Number | Chg No | Supplier |
|---|---|---|---|---|---|
| ☐ | | | *HM-000026/0001* | | Amersham Glass |
| ☐ | | | *HM-000028/0001* | | Amersham Glass |
| ☐ | | | *HM-000028/0002* | | Advanced Micro Devices |

## 7.3.3 Using a . Dot to Filter

Dots are used when filtering on a search will enable you to search on words, codes and values. Depending on where you place the Dot will return different results. This represents any individual or single character.

For example, using the Dot represents a character. If you wanted to search on all the PINV and PINN transactions in the Purchase Ledger, you could use the comma and string the codes, or use the Dot wildcard.

Figure 27: The Filter P.N.




The Dot filters are not widely used and would only be utilised if the Comma or the Asterisk is not required.

| Note |
|---|
| If you need to use the Dot filter and the code you are entering has a full stop, then use \ before the full stop.<br><br>COINS will recognise the full stop and not use it as part of the filter. |

### 7.3.4 Using an ! Exclamation Mark to Filter

Exclamation Marks are used to exclude records, words, codes or values from a list. These are looking for a match in the Search field when excluding data.

Figure 28: The ! Filter


Using this wildcard would normally be used in conjunction with others, as if you are excluding something, you would require everything else, for example:: exclude all orders on the 14th April 2010 however show me everything else.

When using the exclude Filter this has to go before any other search filters as shown above.

### 7.3.5 Using a \\ Double Backslash to Filter

Double Backslash is used to filter on a range between either two dates or codes. By having these available you can search on a range of information, data and records.

The Double Backslash can also be used in conjunction with other filters to create an exact search and filter for the information you require. Use a Dash will define the From and To.

1. Enter Double Backslash The Date From(ddmmyy) - The Date To(ddmmyy) in the Filter field.

Figure 29: Using the Double Backslash to Filter a Date Range

2. You must enter the date in full otherwise COINS will look for a code range.

**Figure 30: The Results using \\140410-160410**

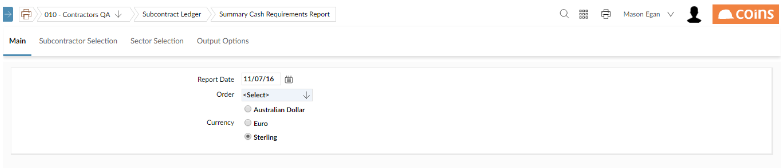
| Account | Original Order Date | Order Date |
|---|---|---|
| LIZ001 | 16/05/16 | 16/05/16 |

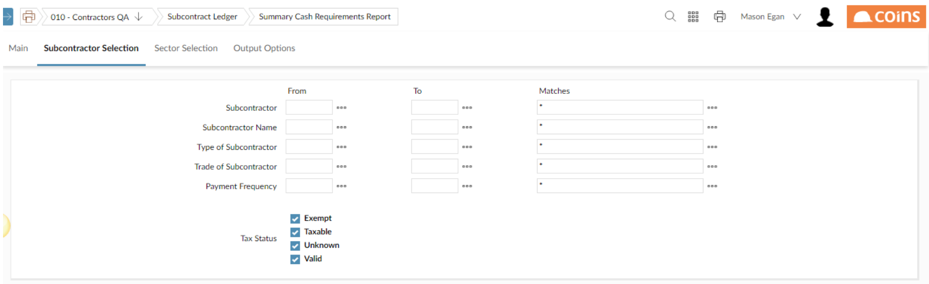
# 8 Reports

COINS has standard reports available to collate records and information as required. Reports are available with predefined filters.

## 8.1 Report Filter Tabs

The Report screens are designed to collate the fields in the same way as the Advanced Filters screens. Radio Button fields are used to filter reports and these are Either/Or type fields as usually only one can be selected.  Tick Box fields are available and these are Yes/No type fields. All the fields and types are collated and grouped under tabs.




Using the fields to filter the data will enable you to run the report collating all the records, information and data required.

1. Enter the information you require in the relevant fields.

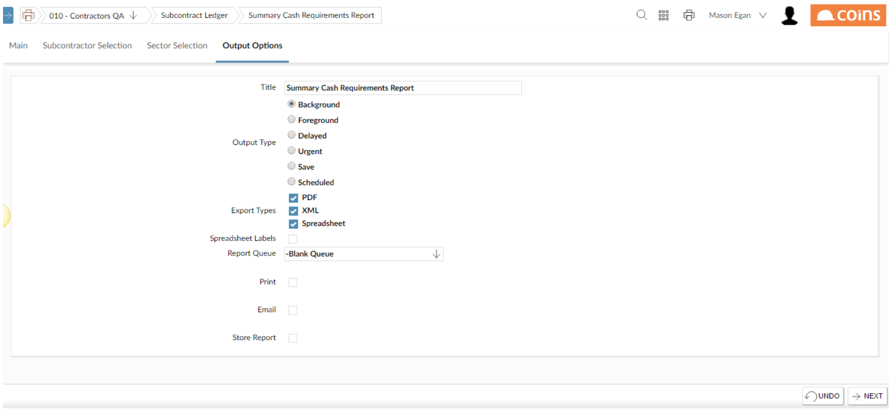
2. Select the Output Option Tab

The Output Options available are the key factors to consider when running reports as this will determine whether the report is available now, in the future, etc and how the data is collated and stored.

## 8.2 Output Options

You will have the Filter tabs and the Output Options tab on every report screen.

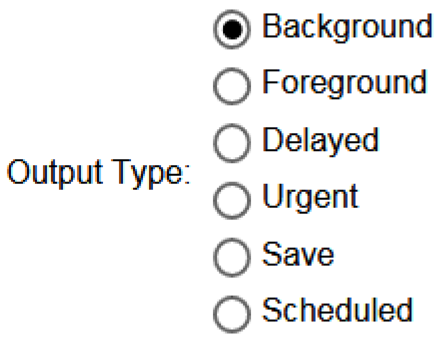
The Output Options tab will enable you to specify how you wish the report to be produced and stored within COINS. It is important you use these correctly so you can maintain your reports going forward.




The Title field is for you to name your report to enable you to identify it when you are locating your report in the Report Status workbench. We would always recommend you change your Title field to be more meaningful, especially if you have filtered to exclude data.

### 8.2.1 Output Types

We have listed below the types of output is available for you to use when running reports. By using these it will enable you to have the report produced correctly in the required format.

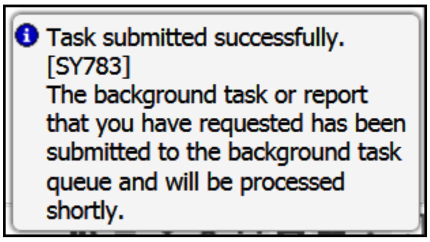



These are Radio buttons, so you can only select one option.

#### 8.2.1.1 Background

The Background output type enables you to run the report in the background of the system, behind the scenes, whilst you can continue with your work.

When you select the Next button a notification message will confirm you have selected the Background option. Notifications will appear in the lower right of your screen.



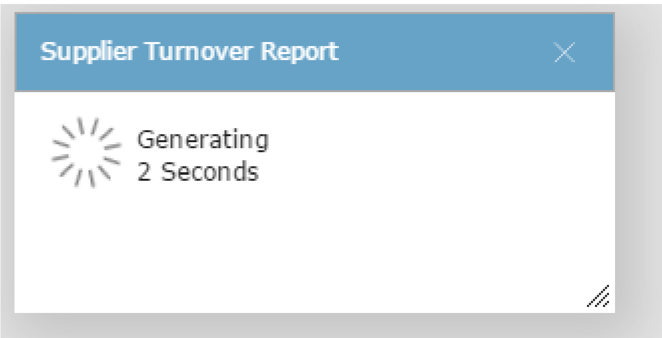

The report will be placed into a queue and will be run when there is a free generator to compile the report.

The report will be located on the Report Status workbench for you to review when you are ready. Once the report has generated another notification message will be displayed, such as:


The title in the message can be clicked and the task summary or report PDF will be shown in a new window/tab.

### 8.2.1.2 Foreground Print

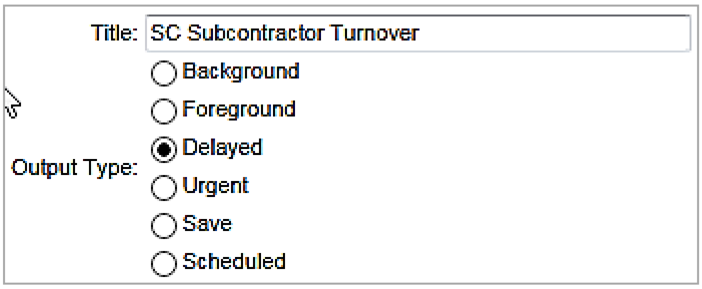
Foreground printing has now been reinstated in a slightly different way. If you choose the Foreground output type, COINS generates the document or report (and displays a message):




When it is complete, COINS displays the document or report in a new window.

### 8.2.1.3 Delayed

The Delayed output type enables you to run the report at a specified time, usually quiet times, such as lunchtimes or evenings. It will run the report in the Background and store the report in the Report Status workbench.

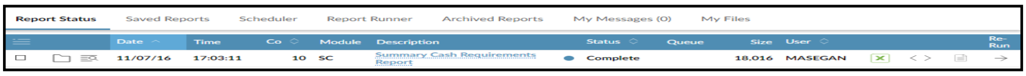



1. Selecting the Delayed radio button will display a new set of fields.


2. Enter the date and time you wish the report to be collated. The data in the report will be accurate at the time the report is run, not the time you submit the request.

3. When you select the Next button a notification message will confirm you selected a Delayed Report and the time the report will run.

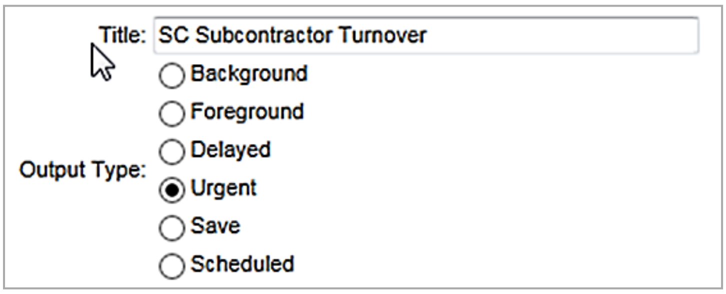
4. A copy of the report will be available in the Report Status workbench for you to review.




The status will be Waiting until the allocated time and will change to Complete.

### 8.2.1.4 Urgent

The Urgent output type enables you to run the report quickly.

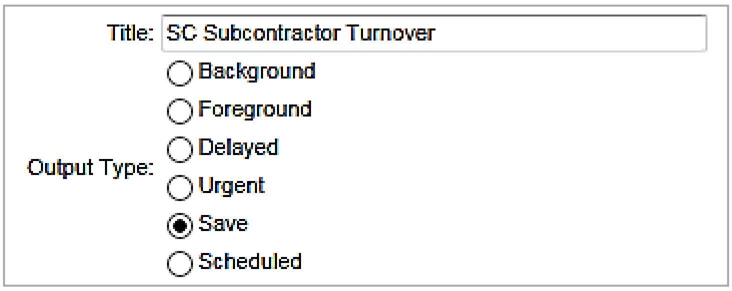


There are two types of queues, Urgent and Normal. By selecting the Urgent button, the report will jump straight to the Urgent queue be processed in the background and store the report in the Report Status workbench.

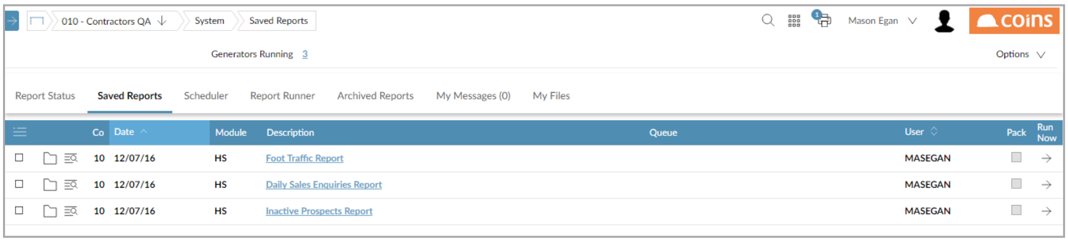
You should be selective and use the Urgent button sparingly, as the majority of reports can be run using the other options. This option is usually restricted to certain users.

### 8.2.1.5 Save

The Save output type enables you to save all the filters you have placed on the report.




Select the Save output type and select the Forward button. The report has not run and will be available in the Report Status workbench, under the Saved Reports tab for you to run. Select the Forward button under the Run Now column.

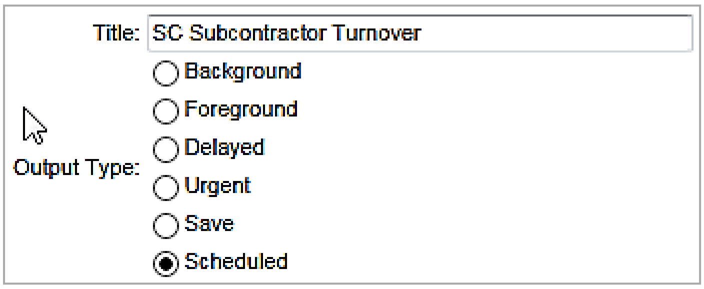



This will run the report for you and also be available for you to run the report whenever required, using the same filters, or amending them if required, i.e. the date range.

You will not be able to select a different Output Type, as Save is the default. There is another tab available for you, Saved Reports tab. This will have a list of all the reports you have run with this saved data for you to maintain.

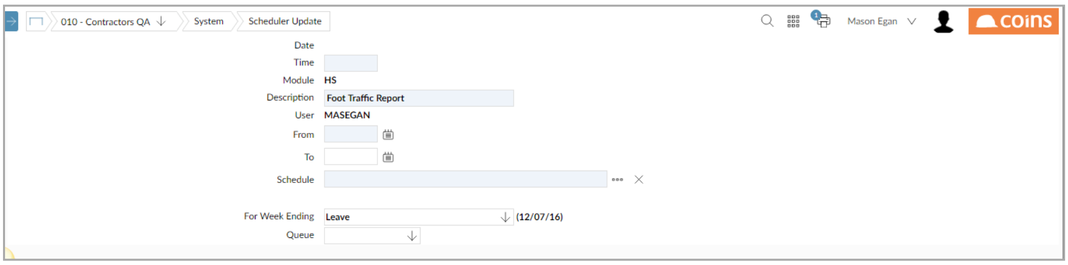
### 8.2.1.6 Scheduled

The Scheduled output type enables you to specify when you wish to run this report and on what frequency bases; for example, every month end. These frequencies will have been predefined.




1. Select the Scheduled output option, then select the Forward button.

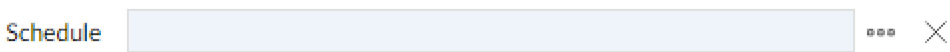
2. The Scheduler Update screen will be displayed to add the schedule which best suits your requirements.

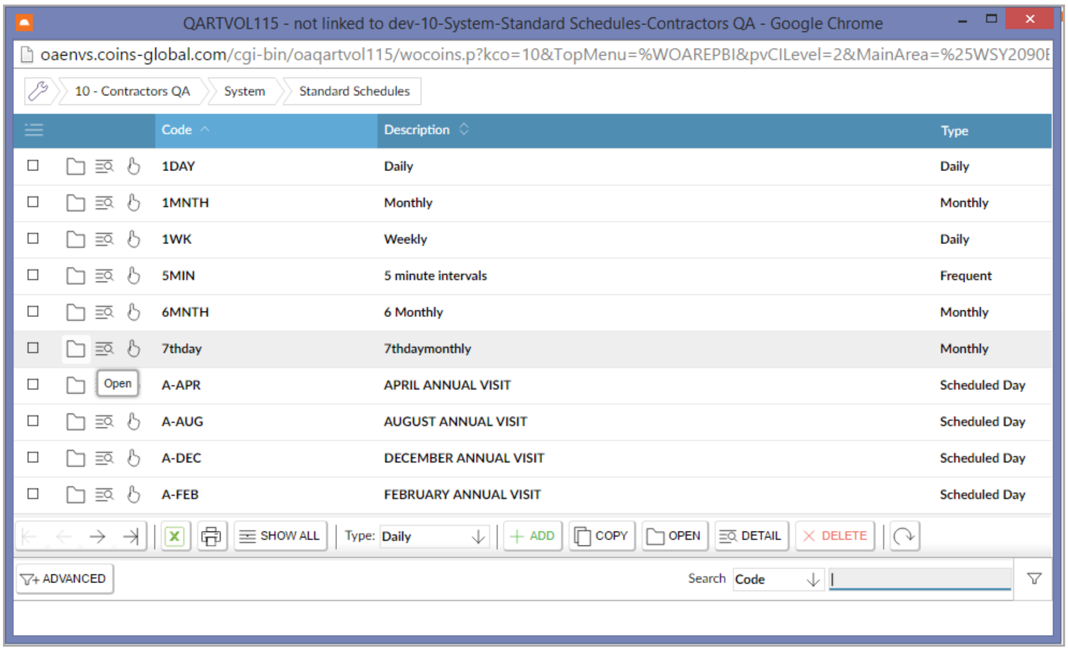



3. Specify the time of day for the report to run.

4. Enter the date range you want this report to be run. This could be over the next year, at the scheduled Monthly frequency. You cannot run the report if you do not enter a date range.

5. Select the Lookup field to select the schedule required





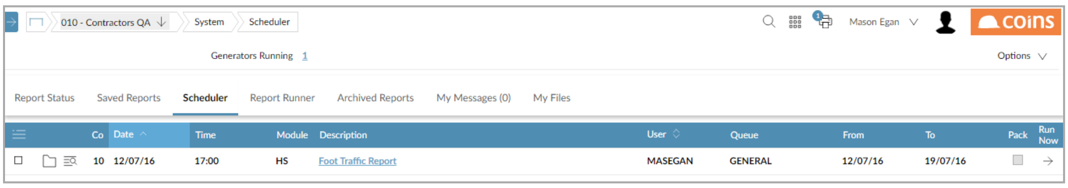

6. This table lists all the current schedule frequencies available. Schedules can be added if there is not one that suits your requirements (this may be restricted by your security access). Select the appropriate schedule using the Select button.

7. Where dates exist in the report selection criteria, for each date do one of the following:

   - Leave as is to use the date you entered (this is shown in brackets after the date field).

   - Choose one of the other options from the Date drop-down field to use the appropriate date offset. The date offsets are set up separately by your system administrator.

8. Select the Saved button and the report will be placed in the Scheduler tab on the Report Status workbench.

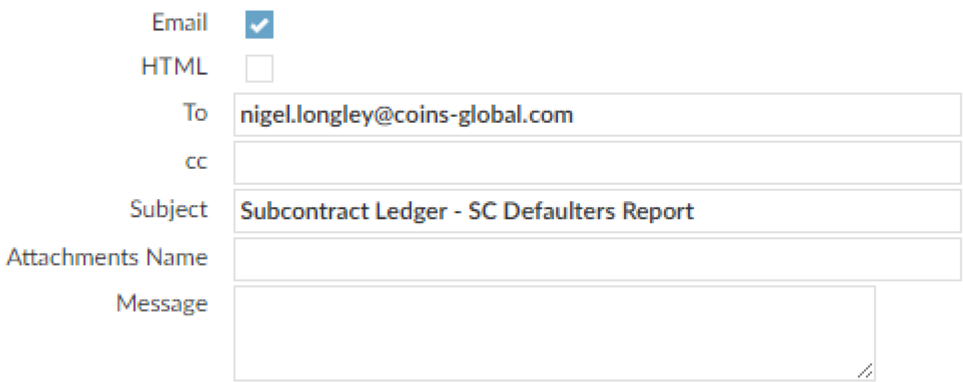



You can also run the report on an ad-hoc basis, by selecting the Run Now button. This will not affect the schedule you have set.

### 8.2.2 Email

To send the report by email once it has completed, tick the email field. Additional selection fields will be displayed.

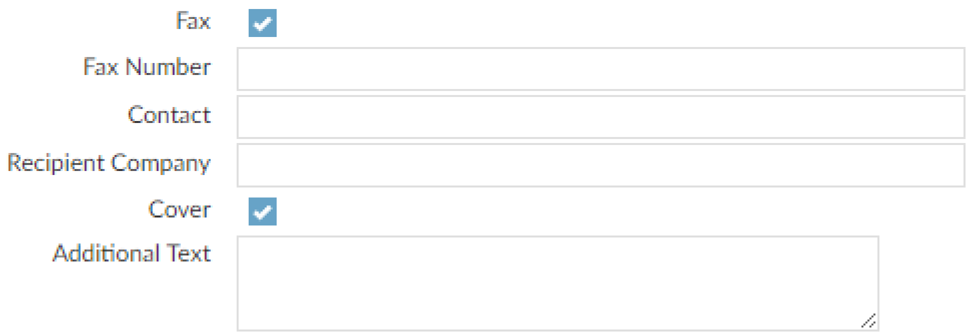
If your user preference are set to the email default, these fields will displayed automatically – in which case, deselecting the field will hide the options.




1. Selecting the Email tick box will enable you to select the email type as well, i.e. HTML.
2. The recipient does not have to be a COINS user or have access to the specific data, as this will be sent in a PDF format to them.
3. COINS will automatically create attachments with a standard naming format consisting of the Module and a sequential number (for example SC000360.pdf). If this is acceptable you need take no further action. If however, you need to specify a file name (for situations where an external system expects an import file with a specific name for example), the Attachments Name field allows you to specify a name for the PDF and Excel attachments in the email.
4. Add additional comments or message if you wish.
5. The report will run in the background and when complete will send the email and also place the report on the Report Status.

### 8.2.3 Fax

1. Selecting the Fax tick box will enable you to select the Cover to send with the fax.




2. The recipient does not have to be a COINS user or have access to the specific data, as this will be sent in a PDF format to them. Add additional comments or message if you wish.

3. The report will run in the background and when complete will send the fax and also place the report on the Report Status.

# 9 Report Packs

Saving a report allows you to store all the parameters to run the report (for example: supplier selection, sector selection, etc); these are defaulted in to the report selection when you run the report. In addition it is possible to map date report parameters such as financial dates or start and end period dates to offset calculations that are evaluated at run time with the current date.

Report Packs builds on this capability and allows you to construct report packs from the saved or scheduled reports. These packs can then be run as a single report run, specifying the date to be used for the mapped date calculations. For example, you might build a month end report pack that requires a month end date for a balance report and a first and last date for a transaction report. Date offset calculations are defined for these dates and assigned to the data parameters of the saved reports. At run time you enter a date, perhaps the month end date, and the other dates required are calculated and the appropriate reports are run.

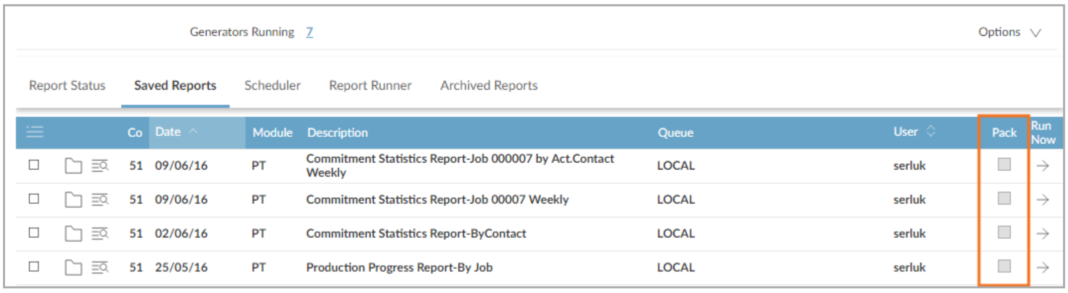
## 9.1 Saving Reports

There is a tickbox on the Saved Reports browse.

### Field Definitions

**Pack**

If selected this allows this saved report to be included in a report pack.



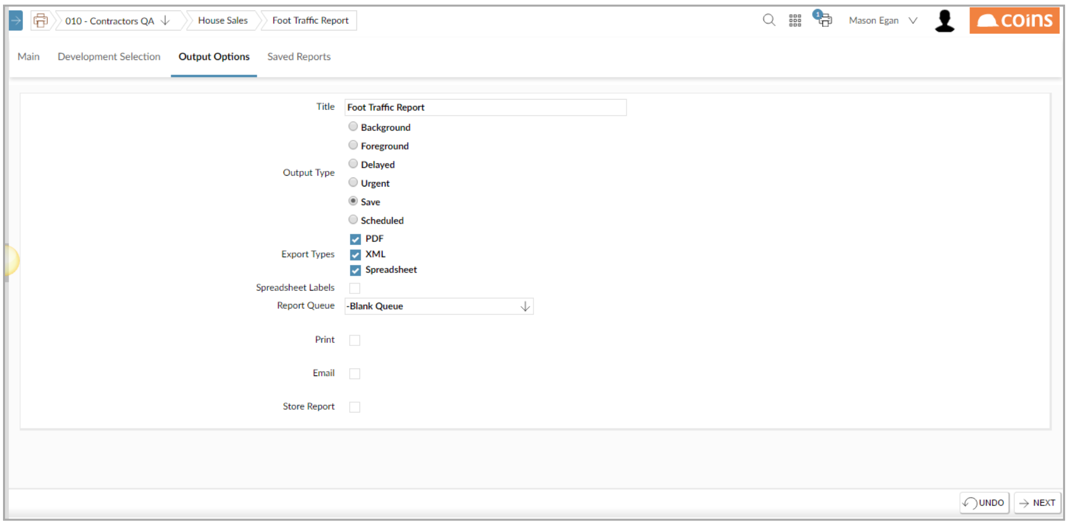

Once a report has been included in a pack (see 9.2.1, Report Pack Reports) then the pack selection cannot be deselected nor the saved report deleted until it is removed from all report packs that use it.

There is similar functionality on scheduled reports to indicate that the report can be included in a report pack.

The existing process for saving a report has not changed:

1. Set the selection criteria for the report.

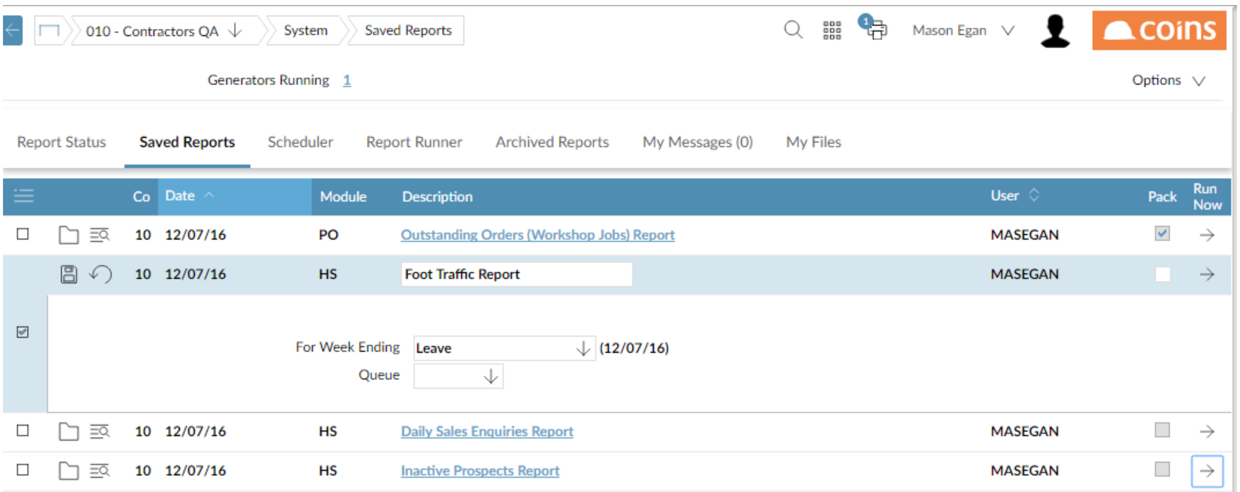

2. On the Output Options tab of the report, select **Save**.




3. Run the report.

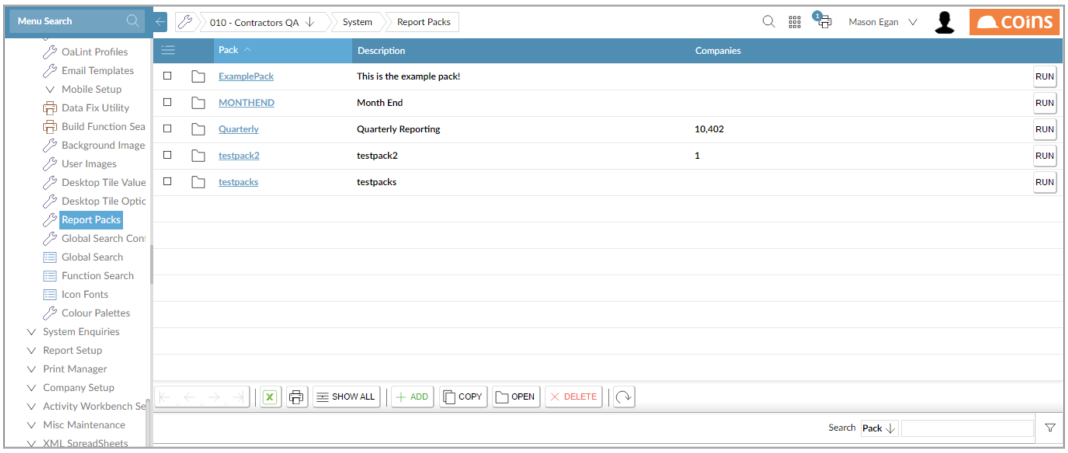
The report is added to the Saved Reports tab in the ***Report Status Workbench***.

4. Open the report record to select the date offsets.



## 9.2 Report Packs

A new function on the System > System Setup menu allows you to define Report Packs.




### Field Definitions

**Pack**

The code to identify the report pack.

**Description**

A description of the report pack.

**Companies**

A can-do list of the companies that are allowed to run this pack. If left blank then all companies can run it.

Following the link on the pack code allows you to define the reports included in the report pack.

### 9.2.1 Report Pack Reports

The ***Report Pack Reports*** screen shows the reports that have been included in the current report pack.

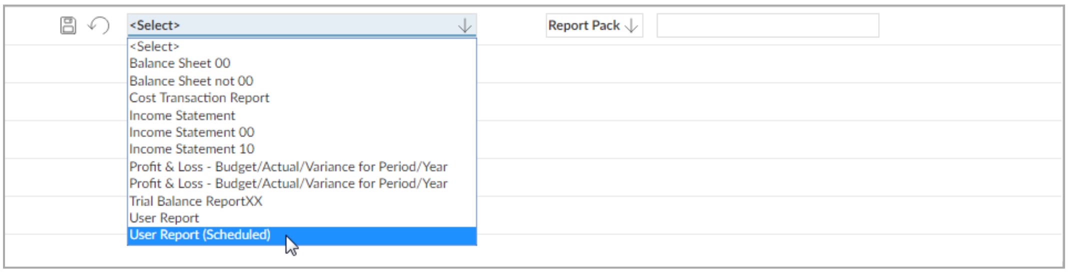
Report Pack CONTRACT Contract Reports RUN

| Report | Output | Companies | Owner |
|---|---|---|---|
| Cost Transaction Report | Report Pack | | TIMARM |
| Batch Status Report | Separate | | DONBAR |
| Monthly Surveyors Report of Costs | Report Pack | | DONBAR |
| Contract Balance Report | Separate | | DONBAR |

## Field Definitions

### Report

The report to be included in the pack. The list shows those saved reports (for all users) that have been selected to be available for report packs.




### Output

Whether the report will be included in the consolidated report (Report Pack) or produced as a separate report (Separate). If you select Separate, the report will be produced as an individual report, using the run date and date offset calculations from the report pack.

### Companies

A can-do list of companies for which this report will be produced.

This allows you to run a report pack for different companies and exclude individual reports that are not appropriate for certain companies. Blank means all companies.

### Owner

The ID of the COINS user who saved the report.