# OA Quick Reference Guide
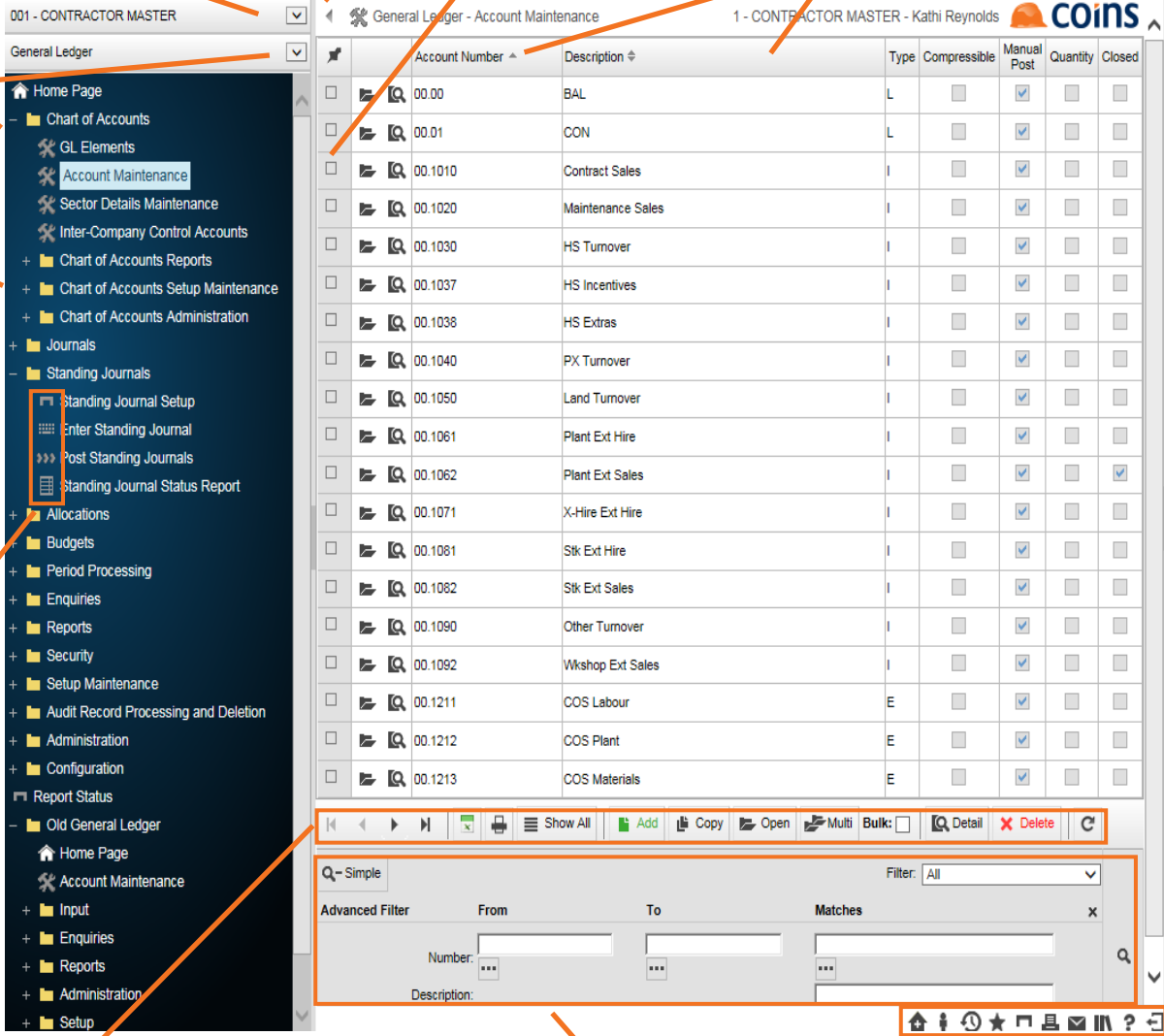
For more detailed information on the contents of this Guide, refer to the COINS Documentation Library.

## Screen Elements

**Click to select a company**

**Click to hide menu**

**Click box to select a row**

**Record Sorting:** Click either the column label or the icon to sort records by that column. The icons show the sort order: not sorted by this column; ▲ ascending - click to reverse; ▼ descending - click to reverse.

**Click to select a module**

**Click + / - sign to expand or collapse menu folder**

**Menu Icons**



**Click a button to navigate, maintain records, etc. - see Browse Bar Buttons section**

**Filter - see Filters section**

**Global Shortcuts - see Global Shortcuts section**

# Global Shortcuts

These shortcuts are found at the bottom of the main OA screen.

| Button/Icon | Title | Button Action | Icon Popup Menu |
|---|---|---|---|
| ▬ | **Minimise Frames** | Minimise all frames to the function bar. Only available if you are set up to use the desktop and have frames open. | |
| ⬓ | **Restore Frames** | Restore all frames. Only available if you are set up to use the desktop and have frames open. | |
| ⠿ | **Show/Hide Desktop** | Show or hide your COINS Desktop. Only available if you are set up to use the desktop. | |
| 🏠 | **Set Home Page** | Make the current page your user home page. Only available if you are NOT set up to use the desktop. | |
| 🕘 | **History** | | Run one of the functions you used recently. |
| 👤 | **User Preferences** | Change your user preferences. | |
| ★ | **Add to Favourites** | Add the current page to your favourites list. | Run one of your favourites. |
| ⊓ | **Activity Workbench** | Open your Activity Workbench in a new window. <br><br> If you have new (unread) actions, the ⊓¹ button shows how many: | Show your new actions. <br><br> Open an activity. |
| 🖶 | **Report Status** | Show the Report Status screen in a new window. <br><br> If you have print jobs that are still generating, the button shows how many: 🖶¹ | Show unread print requests. <br><br> Read an unread print request. |
| ✉ | **Email Link** | Email a link to the current page. | |
| 📚 | **Documentation** | Open the COINS documentation library. | |
| ? | **Help** | Open the side-frame help. | |
| ⤓ | **Logout** | Log out of COINS. | |

# Filters

## Simple Filter

- If you do not see the results you expect, look at the Search dropdown to check that the filter is applied to the correct column
- Can use wildcards (see Wildcards section below)

- Use for simple searches
- Usually has focus at first
- Only need to type first few letters

## Advanced Filter



- From / To fields: don't use wildcards
- Matches field: use full value or wildcards (see Wildcards section below)
- Provides more filtering options

Use for:
- Ranges (From / To)
- Filtering on more than one field

## Filter Buttons
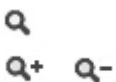
| Button | Keyboard Shortcut | Name/Description |
|---|---|---|
| 🔍 | CTRL+SHIFT+A | **Apply Filter** - Apply the filter on a search |
| 🔍+  🔍− | CTRL+SHIFT+T | **Toggle Filter** - Toggle between the simple and advanced filters |

## Wildcards (used with Filters)

| Character | Definition | Example | Result |
|---|---|---|---|
| * | Any string of characters | b* | Show any item beginning with **b** that has any number of characters after it |
| | | *builder* | Show any item with **builder** and any number of characters before or after it |
| | | *b | Show any item ending with **b**, but with any number of characters before it |
| . | Single character | b.b | Show any item beginning with **b** and ending with **b**, and with a single character in the middle |
| ! | Exclude | !brick,* | Show everything except the item **brick** (excludes must come first - **\*,!brick** would include everything, including **brick**) |
| ,, | List | brick,tile | Show only the items **brick** and **tile** |

# Browse Bar Buttons

Buttons found on the Browse screen button bar are detailed below. Not all buttons are available on all screens. **Note:** Some buttons are not shown in the image but are still detailed below.

| Button | Name/Description |
|---|---|
| First Page | **First Page -** On a browse, go to the first screen of records. On a detail screen, go to the first record. |
| Previous Page | **Previous Page -** On a browse, go to the previous screen of records. On a detail screen, go to the previous record. |
| Next Page | **Next Page -** On a browse, go to the next screen of records. On a detail screen, go to the next record. |
| Last Page | **Last Page -** On a browse, go to the last screen of records. On a detail screen, go to the last record. |
| Export | **Export -** Export the records you have filtered on to a spreadsheet. Either select the records you want to export, click the Selected Filter, and click the Export button; or filter the records you want by using the standard filter and clicking the Export button; this exports only the records matching the filter you applied. |
| Print | **Print -** Produce a report from the records you have filtered on. |
| Show All | **Show All -** Show all the records as a single list, with a scrollbar, rather than page by page. **Note:** You can use Ctrl+F to find a word on this list. |
| Add | **Add -** Add a new record, for example contract, customer account, or transaction. |
| Copy | **Copy -** Copy a record (select the record you want to copy first). |
| Open | **Open -** Open a record to allow you to update the information (select the record first). |
| Concurrent Update | **Concurrent Update -** Update several records and save them together. |
| Multi Update | **Multi Update -** Change the values of one or more fields on several records together; for each field, the same changes apply to every record. |
| Bulk: ☐ | **Bulk -** Applies to Add, Copy, and Update buttons. Add, copy, or update numerous records using a spreadsheet. |
| Detail | **Detail -** Show detailed information on a record or records (select them first). |
| Delete | **Delete -** Delete a record or records (select them first). |
| Refresh | **Refresh -** Refresh the contents of a browse screen. |
| Audit | **Audit -** See what changes were made (for a field), by who, and when. |
| Insert | **Insert -** Insert a new record above the one you selected. |
| Mail Merge | **Mail Merge -** Create a mail merge. |
| Move Down | **Move Down -** Move the record(s) you have selected one row down. |
| Move Up | **Move Up -** Move the record(s) you have selected one row up. |
| Total | **Total -** Sum or count the records you have filtered on. |

# Additional Screen Buttons

**Note:** Not all buttons are available on every screen.

| Button | Name/Description |
|---|---|
| | **Add Documents -** View any documents attached to a record, and attach new ones. |
| | **Add Notes -** View any notes attached to a record, and attach new ones. |
| | **Apply Action -** Apply the action chosen from the Choose Action drop down menu. |
| | **Calendar -** Display a calendar and choose a date to insert in a date field. |
| | **Clear -** Clear the lookup item in the text box. |
| | **Column Sets -** Choose which columns to use on the screen. |
| | **Lookup -** Look up existing values in the database. Used for filling in fields. |
| | **Next -** Proceed to the next stage of the process. |
| | **Save -** Save your changes. |
| | **Select -** In a lookup, select the record to be added to the lookup field. |
| | **Selected Filter -** Select records (you must select them first and then click on the Selected Filter button). This is also used for selecting records that you want to export to Excel and if you want to sum up records (select the records first, click this, and then click either Total or Export). |
| | **Undo -** Undo to exit (or close) a record without saving changes. |

# Record Selection Shortcuts

**To use these shortcuts, you must click the selection tickbox.**

| | |
|---|---|
| **CTRL+CLICK** | Select more than one record |
| **DOUBLE-CLICK ON ROW** | Display records starting with the selected row |
| **CTRL+DOUBLE-CLICK ON ROW** | Display records ending with the selected row |
| **SHIFT+CLICK** | Select a range of records that begins with the one that's already selected |

# Additional Shortcuts

| | |
|---|---|
| **CTRL+CLICK ON MENU ITEM** | Open in new tab |
| **SHIFT+CLICK ON MENU ITEM** | Open in new window |

# Standard Browser Keys

| | | | | |
|---|---|---|---|---|
| **ALT+LEFT** | Back | | **CTRL+V** | Paste |
| **ALT+RIGHT** | Forward | | **CTRL+X** | Cut |
| **CTRL+C** | Copy | | **F11** | Full screen |
| **CTRL+F** | Find text on a web page | | **SHIFT+TAB** | Previous field |
| **CTRL+P** | Print | | **TAB** | Next field |