

# OA Quick Reference Guide



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

## Screen Elements

**Menu Search**

**Click to show/hide menu panel (see #1 below)**

**Click anywhere on row to select it**

**Click to select a company**

**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.

**Page Header - see Page Header Icons section**

**Browse Menu (see #2 below)**

**Click arrow to expand or collapse module folder**

**Menu Icons**

Account Number	Description	Type	Compressible	Manual Post	Quantity	Closed
30.000.40100	West Unbilled Rev Adjustments	I	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.40100	West Service Unbilled Rev Adjustments	I	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.40000	West Service Revenue	I	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.12100	West Service Prepaid Expenses	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.61100	West Service Indirect Labor Taxes	E	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.60999	West Service Indirect Labor Redirected	E	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.61200	West Service Indirect Labor Insurance	E	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.61000	West Service Indirect Labor Fringes	E	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.60800	West Service Indirect Labor - Pto	E	<input type="checkbox"/>	<input type="checkbox"/>		
30.200.60000	West Service Indirect Labor - Salaries	E	<input type="checkbox"/>	<input type="checkbox"/>		
30.200.60100	West Service Indirect Lab - Unapplied	E	<input type="checkbox"/>	<input type="checkbox"/>		
30.200.13000	West Service Costs In Excess	A	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.54000	West Service Cos - Subcontract	E	<input type="checkbox"/>	<input type="checkbox"/>		
30.200.55000	West Service Cos - Other Cost	E	<input type="checkbox"/>	<input type="checkbox"/>		
30.200.52000	West Service Cos - Material	E	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.51100	West Service Cos - Labor Taxes	E	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.51200	West Service Cos - Labor Insurance	E	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.51000	West Service Cos - Labor Fringes	E	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.51999	West Service Cos - Labor Allocations	E	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.50000	West Service Cos - Labor	E	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.50999	West Service Cos - Lab Redirected (Contra)	E	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
30.200.53000	West Service Cos - Equipment	E	<input type="checkbox"/>	<input type="checkbox"/>		

**Buttons for navigating, maintaining records, etc. - see Browse Screen Icons/Buttons section**

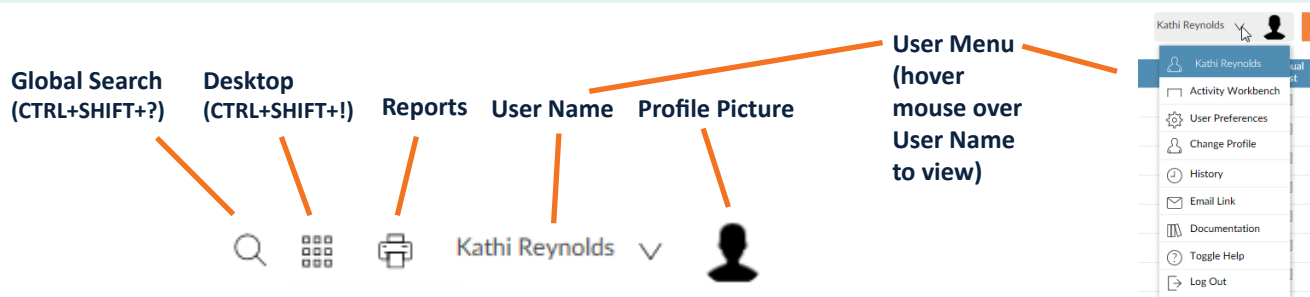
**Filter - see Filters section**

- 1. Menu Panel** - CTRL+SHIFT+> to open and CTRL+SHIFT+< to open/close the menu panel.
- 2. Browse Menu** - Move mouse pointer over the menu icon in the top-left corner of a browse to show the following (where permitted):
  - Show Selected/Show All* - click to show the selected records, or SHIFT+CLICK to select all records
  - Query Editor* - if you have access to Query Editor, open the query for the current page in the Query Editor
  - Maximize* - open an inline browse on a tabbed page in a frame to see more records. The inline browse is refreshed when closed.
  - Column Sets* (if enabled for the browse) - select and maintain column sets

# Page Header Icons



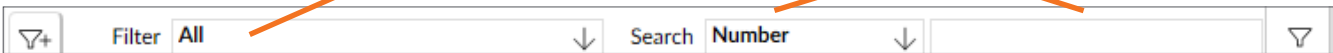
The icons shown below are found at the top right side of the screen.



Button/Icon	Title	Button Action	Icon Popup Menu
	<b>Global Search</b>	Search COINS for specific information.	
	<b>Show/Hide Desktop</b>	Show or hide your COINS Desktop. Only available if you are set up to use the desktop.	Show a list of minimized frames.
	<b>Reports</b>	Show the Report Status screen in a new window.  Colored indicators show how many unread print requests (theme color, such as blue) and requests currently generating (red) you have.	Generating and unread print requests.  Click a report title to view the report.
[User Name]	<b>Your User Name</b>	The name of the user.	The Icon Popup Menu is the User Menu, which includes the options explained in the table below.

Action Icon	Title	Menu Action	Comments
	<b>Activity Workbench</b>	Open your Activity Workbench by clicking the menu option.  If you have new (unread) actions, the button shows how many:	The menu item popup menu shows the outstanding actions, and you can view that action/appointment by clicking the item in that popup menu.  Click an action to open it.
	<b>User Preferences</b>	Change your user preferences.	Open User Preferences screen in a frame.
	<b>Change Profile</b>	Change the display name and profile picture shown in the header.	
	<b>History</b>	Show a separate menu of recently used functions.	Run one of the functions or add them to your COINS Desktop as tiles.
	<b>Email Link</b>	Email someone a link to the current page.	
	<b>Documentation</b>	Open the COINS documentation library in a new tab or window.	
	<b>Toggle Help</b>	Show/hide the side-frame help.	
	<b>Logout</b>	Log out of COINS.	
	<b>Minimize Frames</b>	Minimize all open frames to the function bar.	Only available if you have at least one frame open.
	<b>Restore Frames</b>	Restore all minimized frames to their previous size.	Only available if you have at least one frame open.

## Simple Filter



Named Filter

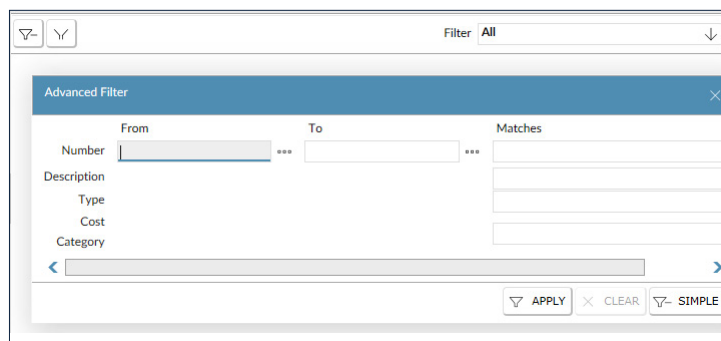
Search Criteria

- Can use wildcards (see **Wildcards** section below)
- Use for simple searches
- Only need to type first few letters
- Usually has focus at first

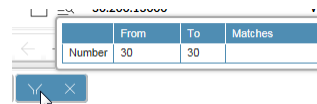
- If you do not see the results you expect, look at the Search dropdown to check that the filter is applied to the correct column

## Advanced Filter

When you select the Advanced Filter, it appears in a popup frame, as shown below.



- Can use full value or wildcards for Matches field
- Use for filtering on more than one field
- Provides more filtering options, such as Ranges (From / To)
- After filter applied, two buttons appear in bottom left corner of browse screen, as shown here:



## Filter Buttons

Button	Keyboard Shortcut	Name/Description
	<b>CTRL+SHIFT+A</b>	<b>Apply Filter</b> - Apply the filter to a browse
		<b>Toggle Filter</b> - Toggle between the simple and advanced filters
	<b>Esc</b>	<b>Hide Advanced Filter Frame</b>

## Wildcards (used with Filters)

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

# Browse Screen Icons/Buttons



Icons/buttons found on the Browse screen are detailed below. Not all icons/buttons are available on all screens. **Note:** Some icons/buttons are not shown in the image above but are still detailed below.

Button	Name/Description
	<b>First Page</b> - On a browse, go to the first screen of records. On a detail screen, go to the first record.
	<b>Previous Page</b> - On a browse, go to the previous screen of records. On a detail screen, go to the previous record.
	<b>Next Page</b> - On a browse, go to the next screen of records. On a detail screen, go to the next record.
	<b>Last Page</b> - On a browse, go to the last screen of records. On a detail screen, go to the last record.
	<b>Export</b> - 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.
	<b>Print</b> - Produce a report from the records you have filtered on.
	<b>Show All</b> - Show all the records as a single list, with a scrollbar, rather than page by page. <b>Note:</b> You can use Ctrl+F to find a word on this list.
	<b>Add</b> - Add a new record, for example contract, customer account, or transaction.
	<b>Copy</b> - Copy a record (select the record you want to copy first).
	<b>Open</b> - Open a record to allow you to update the information (select the record first).
	<b>Concurrent Update</b> - Update several records and save them together.
	<b>Multi Update</b> - Change the values of one or more fields on several records together; for each field, the same changes apply to every record.
	<b>Toggle Bulk</b> - Applies to Add, Copy, and Update buttons. Add, copy, or update numerous records using a spreadsheet.
	<b>Detail</b> - Show detailed information on a record or records (select them first).
	<b>Delete</b> - Delete a record or records (select them first).
	<b>Refresh</b> - Refresh the contents of a browse screen.
	<b>Audit</b> - See what changes were made (for a field), by who, and when.
	<b>Insert</b> - Insert a new record above the one you selected.
	<b>Mail Merge</b> - Create a mail merge.
	<b>Move Down</b> - Move the record(s) you have selected one row down.
	<b>Move Up</b> - Move the record(s) you have selected one row up.
	<b>Total</b> - Sum or count the records you have filtered on.
	<b>Browse Menu</b> - Move mouse pointer over the menu icon in the top left corner of a browse to show the following (where permitted): Show Selected/Show All, Query Editor, Maximize, Column Sets (if enabled for the browse).

## Additional Screen Buttons

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

Button	Name/Description
	<b>Add Documents</b> - View any documents attached to a record, and attach new ones.
	<b>Add Notes</b> - View any notes attached to a record, and attach new ones.
	<b>Apply Action</b> - Apply the action chosen from the Choose Action drop down menu.
	<b>Clear</b> - Clear the lookup item in the text box.
	<b>Date Lookup</b> - Display a calendar and choose a date to insert in a date field.
	<b>Dropdown Arrow</b> - Click to show dropdown menu.
	<b>Lookup</b> - Look up existing values in the database. Used for filling in fields.
	<b>Next</b> - Proceed to the next stage of the process.
	<b>Regenerate</b> - Regenerate data on the screen.
	<b>Save</b> - Save your changes.
	<b>Select</b> - In a lookup, select the record to be added to the lookup field.
	<b>Selected Filter</b> - 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).
	<b>Undo</b> - Undo to exit (or close) a record without saving changes.

## Record Selection Shortcuts

To use these shortcuts, click anywhere on the row.

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

## Additional Shortcuts

<b>CTRL+CLICK ON MENU ITEM</b>	Open in new tab
<b>SHIFT+CLICK ON MENU ITEM</b>	Open in new window

## Standard Browser Keys

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