

OA Quick Reference Guide



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

Screen Elements

Menu Search

Browse Menu (see #2 below)

Click
v / >
arrow to expand or collapse module folder

Menu Icons

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

The screenshot displays the COINS software interface. On the left is a 'Menu Search' panel with a tree view of modules like 'Fixed Assets', 'Forecasting', 'General Ledger', 'Journals', 'Allocations', 'Budgets', 'Period Processing', 'Inquiries', 'Reports', 'Security', 'Setup Maintenance', 'Audit Record Processing and Deletion', 'Administration', 'Configuration', 'Report Status', 'Old General Ledger', 'Health & Safety', 'House Sales', 'Human Resources', 'Inspections', 'Land Appraisal', 'Lettings Management', and 'CRM'. The 'General Ledger' module is expanded, showing sub-items like 'Home Page', 'Chart of Accounts', 'GL Elements', 'Account Maintenance', 'Sector Details Maintenance', 'Inter-Company Control Accounts', 'Chart of Accounts Reports', 'Chart of Accounts Setup Maintenance', 'Chart of Accounts Administration', 'Standing Journals', 'Standing Journal Setup', 'Enter Standing Journal', 'Post Standing Journals', and 'Standing Journal Status Report'. The 'Account Maintenance' item is highlighted. The main area shows a table of records with columns: 'Account Number', 'Description', 'Type', 'Compressible', 'Manual Post', 'Quantity', and 'Closed'. The table contains 20 rows of data. At the bottom, there is a navigation bar with buttons for navigating, maintaining records, etc., and a filter section with a dropdown menu set to 'All' and a search box with the text 'Number'.

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

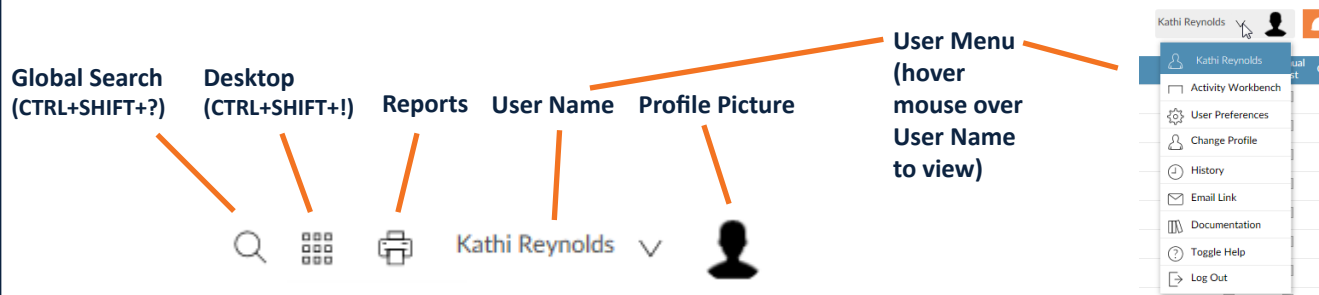
Maximise - open an inline browse on a tabbed page in a frame to see more records. The inline browse is refreshed when closed.

Column Sets (if enabled for the browse) - select and maintain column sets

Page Header Icons

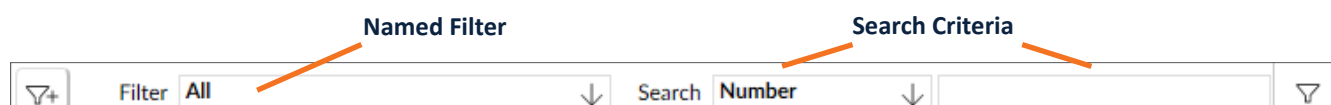


The icons shown below are found at the top right side of the screen.



Button/Icon	Title	Button Action	Icon Popup Menu
	Global Search	Search COINS for specific information.	
	Show/Hide Desktop	Show or hide your COINS Desktop. Only available if you are set up to use the desktop.	Show a list of minimised frames.
	Reports	Show the Report Status screen in a new window. Coloured indicators show how many unread print requests (theme colour, 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]	Your User Name	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
	Activity Workbench	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.
	User Preferences	Change your user preferences.	Open User Preferences screen in a frame.
	Change Profile	Change the display name and profile picture shown in the header.	
	History	Show a separate menu of recently used functions.	Run one of the functions or add them to your COINS Desktop as tiles.
	Email Link	Email someone a link to the current page.	
	Documentation	Open the COINS documentation library in a new tab or window.	
	Toggle Help	Show/hide the side-frame help.	
	Logout	Log out of COINS.	
	Minimise Frames	Minimise all open frames to the function bar.	Only available if you have at least one frame open.
	Restore Frames	Restore all minimised frames to their previous size.	Only available if you have at least one frame open.

Simple Filter



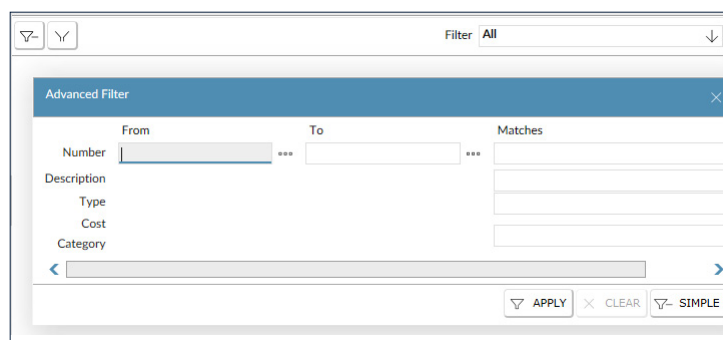
Named Filter

Search Criteria

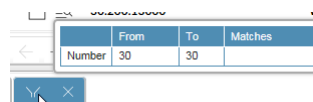
- Can use wildcards (see [Wildcards](#) section below)
- Use for simple searches
- Only need to type first few letters
- Usually has focus at first
- If you do not see the results you expect, look at the Search dropdown to check that the filter is applied to the correct column

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
	CTRL+SHIFT+A	Apply Filter - Apply the filter to a browse
		Toggle Filter - Toggle between the simple and advanced filters
	Esc	Hide Advanced Filter Frame

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
















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
	First Page - On a browse, go to the first screen of records. On a detail screen, go to the first record.
	Previous Page - On a browse, go to the previous screen of records. On a detail screen, go to the previous record.
	Next Page - On a browse, go to the next screen of records. On a detail screen, go to the next record.
	Last Page - On a browse, go to the last screen of records. On a detail screen, go to the last record.
	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 - Produce a report from the records you have filtered on.
	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 a new record, for example contract, customer account, or transaction.
	Copy - Copy a record (select the record you want to copy first).
	Open - Open a record to allow you to update the information (select the record first).
	Concurrent Update - Update several records and save them together.
	Multi Update - Change the values of one or more fields on several records together; for each field, the same changes apply to every record.
	Toggle Bulk - Applies to Add, Copy, and Update buttons. Add, copy, or update numerous records using a spreadsheet.
	Detail - Show detailed information on a record or records (select them first).
	Delete - Delete a record or records (select them first).
	Refresh - Refresh the contents of a browse screen.
	Audit - See what changes were made (for a field), by who, and when.
	Insert - Insert a new record above the one you selected.
	Mail Merge - Create a mail merge.
	Move Down - Move the record(s) you have selected one row down.
	Move Up - Move the record(s) you have selected one row up.
	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.
	Clear - Clear the lookup item in the text box.
	Date Lookup - Display a calendar and choose a date to insert in a date field.
	Dropdown Arrow - Click to show dropdown menu.
	Lookup - Look up existing values in the database. Used for filling in fields.
	Next - Proceed to the next stage of the process.
	Regenerate - Regenerate data on the screen.
	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, click anywhere on the row.

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