Training Guide

Navigation within prof.ITplus

Navigation around the prof.ITplus software can be achieved using either the Mouse or Keyboard. Below we have detailed the functionality and options for using both.

Starting OGL prof.ITplus Software

- **Using the Mouse** – Double Click the OGL icon on the desktop
- **Using the Keyboard** – Press the Windows key to display the Start Menu. Use the cursor keys to navigate to the prof.ITplus client program and then press the Enter key.

To Exit the OGL prof.ITplus Software

- **Using the Mouse** – Select the Exit button
- **Using the Keyboard** – Press the 'Alt' and 'X' key at the same time

Selecting a program – Menu Screen

Using the Standard Menu Option

- **Using the Mouse** – Double click the required menu option
- **Using the Keyboard** – Enter the number of the required option and press the Enter key. Alternatively, use the up and down arrow keys to highlight an option before pressing the Enter key. If there is a sub option, by pressing the Enter key the Sub Option Menu will be displayed.

Using the Mouse Over Menu Option

- **Using the Mouse** – Double click on the required menu option
- **Using the Keyboard** – Use the up and down arrow keys to highlight an option before pressing the Enter key. Left and Right arrow keys can be used to move to Sub Option menus.

Using the Button Menu Option

- **Using the Mouse** – Click once on the required menu option
- **Using the Keyboard** – Use the up and down arrow keys to highlight an option before pressing the Enter key. Left and Right arrow keys can be used to move to Sub Option menus.

Close/Exit a Screen

- **Using the Mouse** – Single click on the Quit or Exit button
- **Using the Keyboard** – Press the 'Alt' key and the 'Q' (Quit) or 'X' (Exit) key at the same time.

Selecting an icon on the Utility Bar

- **Using the Mouse** – Single click on the required icon
- **Using the Keyboard** – Press F11 Function Key and, using the left and right arrow keys, select the required icon. Press Enter key to activate the icon.

Select the Online Help

- **Using the Mouse** – Single click on the Online Help icon
- **Using the Keyboard** – Press F1 Function Key

Close the Online Help Screen

- **Using the Mouse** – Single click on the Close button (cross) in the top right-hand corner
- **Using the Keyboard** – Press the 'Alt' and 'F4' key at the same time

Selecting an option from the Options Bar

- **Using the Mouse** – Single click on the required option
- **Using the Keyboard** – If the focus is already on the Options Bar (indicated by a border around one of the options), any option can be selected by pressing the appropriate underlined letter. Alternatively, use the arrow key to move to the option and press the Enter key.

  If the focus is not on the Options bar, press the 'Alt' key and the underlined letter at the same time.

Using the prof.ITplus Lookup Facilities

- **Using the Mouse** – Single click on the Lookup icon (usually displayed to the right of the input box)
- **Using the Keyboard** – Press F2 Function key from within the input box where the Lookup icon is displayed

Select the Sub Option Menu (only available on selected screens)

- **Using the Mouse** – Single click on the Sub Options icon on the Utility Bar
- **Using the Keyboard** – Press F10 Function key

Select Hotkey (must be setup via User Preferences)

- **Using the Mouse** – Single click on the Hotkeys icon on the Utility Bar
- **Using the Keyboard** – Press the required Function Key at the same time as the Shift Key e.g. 'Shift' and 'F1'

Moving around a screen

- **Using the Mouse** – Single click within the required input box (NB: if entering data within an 'Add' or 'Change' option, system will not allow user to click on another field if the current field is blank and set as a mandatory field)
- **Using the Keyboard** – Use the Tab key to move forward to the next field

  To move backwards press the 'Shift' key at the same time as the 'Tab' key

To highlight the entire contents of an input box, use the up or down arrow keys

NB: within User Preferences it is possible to define the 'Enter' key as operating in the same way as the Tab key

Activating the Calculator from within an Input Box

- **Using the Mouse** – Single click on the Calculator icon to the side of the box
- **Using the Keyboard** – Press F2 Function Key within a relevant input box (NB: can use the calculator to calculate a value and then select OK to populate the input box with the calculated result)

Activating the Calendar from within an Input Box

- **Using the Mouse** – Single click on the Calculator icon to the side of the box
- **Using the Keyboard** – Press F2 Function Key within a relevant input box (NB: can use the calendar functions to determine the required date and then select OK to populate the input box with the chosen date

NB: When entering a date manually it is not always necessary to enter the date in full. If the date required is within the current month only the day is required, if within the current year only the day and month is required.

Selecting an Option from within Drop Down List Boxes

- **Using the Mouse** – Single click on the Drop Down arrow to display the options and then single click on the required option
- **Using the Keyboard** – Use the Up and Down Arrow keys to scroll through the options or press the Alt key at the same time as the Up or Down Arrow key to display the whole list of options. Highlight the required option and press the Enter key to select

Selecting an Option from Radio Buttons

- **Using the Mouse** – Single click on the required option
- **Using the Keyboard** – Use the Right and Left Arrow keys to select the required option or enter the first letter of the option to select it

Enabling an Option from a Tick Box

- **Using the Mouse** – Single click on the option to enter a tick and therefore enable the option
- **Using the Keyboard** – Whilst the option is highlighted, use the Space Bar to add or remove the tick. Alternatively, enter Y or N as appropriate

Displaying additional information from icons e.g. Customer, Supplier or Stock Memos

- **Using the Mouse** – Single Click on the displayed icon

to activate the display of additional information
- **Using the Keyboard** – Press 'Alt' key at the same time as the underlined letter or number e.g. Alt and 1 to display Memo 1

Opening a New Prof.ITplus Window

- **Using the Mouse** – Single click on the Open New Session icon on the Utility Bar to open a new prof.ITplus window
- **Using the Keyboard** – Press F11 Function key to move focus to the Utility Bar. Open New Session icon should be highlighted, press Enter key to select

Opening the Print Controller

- **Using the Mouse** – Single click on the Print Controller icon on the Utility Bar to open the Print Controller
- **Using the Keyboard** – Press F11 Function key to move focus to the Utility Bar and then use the Left and Right Arrow keys to move to the Print Controller icon, then press the Enter key to select

Sending a Fax Message

- **Using the Mouse** – Single click on the icon on the Utility Bar to open a new Fax Message screen. NB: if this is done when in a Customer or Supplier focused screen, their contact details will be automatically populated in the Fax message
- **Using the Keyboard** – Press F11 Function key to move focus to the Utility Bar and then use the Left and Right Arrow keys to move to the Fax Message icon, then press the Enter key to select

Sending an Email

- **Using the Mouse** – Single click on the Email icon on the Utility Bar to open up a new Email window within your default email package (NB: contact details will not be populated from prof.ITplus). If you click on the same icon displayed next to a contact name, their details will be populated into the contact field within the email
- **Using the Keyboard** - Press F11 Function key to move focus to the Utility Bar and then use the Left and Right Arrow keys to move to the Email icon, pressing Enter to select

Data Drill Down

- **Using the Mouse** – Single click on the Drill Down icon on the Utility Bar to open up a new window and will allow you to drill into information related to the screen in which you clicked the icon
- **Using the Keyboard** - Press F11 Function key to move focus to the Utility Bar and then use the Left and Right Arrow keys to move to the Drill Down icon, pressing Enter to select