Keyboard Shortcuts

Keyboard shortcuts, also sometimes called hotkeys, allow power users to work much more quickly in Agiloft. The standard shortcuts are initially defined in a Default shortcut scheme available to all users. Admins can change the default keystroke combinations, and create multiple shortcut schemes that can be applied to different teams.

Individual power users can also edit the shortcuts to suit their own preferences.

By default, the full list of shortcuts is accessed by pressing Alt + /

Shortcuts are grouped into three categories:

- General
- Table Views
- Record Forms

Each category controls elements in its respective area of the system, though many work regardless of the context. For example, Logout ends the user session regardless of where you are in the system.

You can disable keyboard shortcuts in a KB by setting the Enable Hotkeys global variable to No.

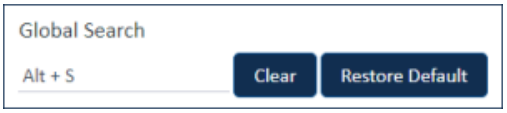
Defining Shortcuts

You can customize your own shortcuts from the Preferences option of the User Menu. Administrators can customize shortcuts and apply the changes to other users.

To customize shortcuts:

1. Go to the shortcut setup wizard:
    - To customize your own shortcuts, open the user menu by clicking on your username and go to **Preferences > Customize Shortcuts**.
    - To define system-wide keyboard shortcuts and apply them to all users or specific teams, click the Setup gear in the top-right corner and go to **Look and Feel > Customize Shortcuts**. Edit the default shortcut scheme, create a new scheme, or edit another existing scheme.
2. For admins working with a scheme, enter a name and description on the first tab, then proceed to the General tab.
3. For each shortcut, review, adjust, or disable it:
    - To change a setting, place your cursor in the input box and press the desired shortcut key combination. If you press a combination that isn't allowed, the system shows a notification warning you to choose another combination.

- To reset a shortcut to the default key combination, click Restore Default.



- To disable a shortcut, click Clear, which removes the key combination from the field.

4. For admins working with a scheme, use the Apply tab to apply the current scheme to specified teams.
5. Click Finish.

Using Shortcuts

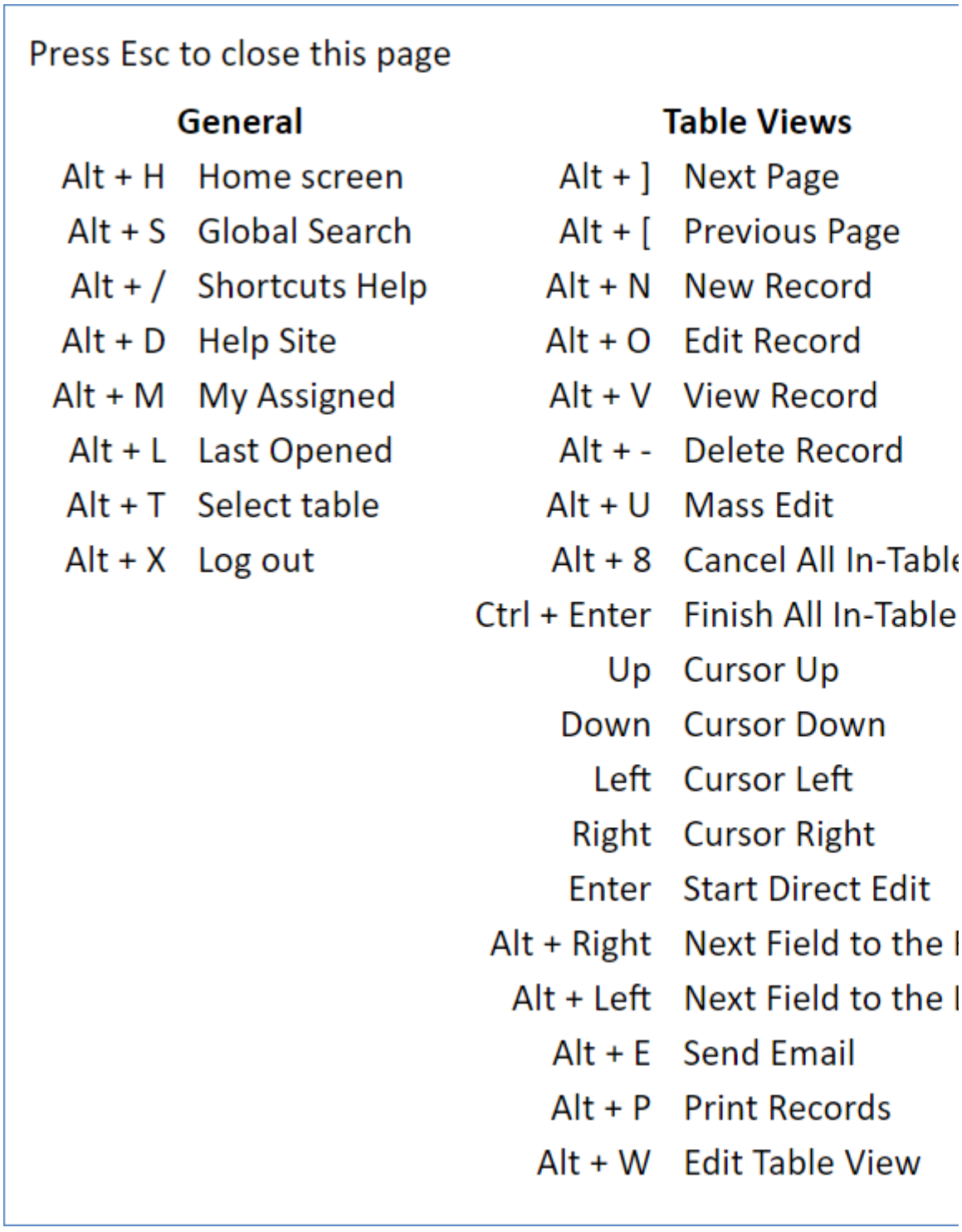
Learning how to use shortcuts and shortcut combinations can greatly improve your productivity and make it easier to access the areas of the system you frequently visit. For instance, the direct edit shortcuts can speed up your field editing and minimize the need to use a mouse.

This section describes how to use many of the system-wide shortcuts, and lists the default keystroke combinations.

General Shortcuts

The general system shortcuts can be used anywhere in the system, including within record forms. If you are in a record form and use a shortcut to navigate out of the form, it will cancel your current progress and move to a new area of the knowledgebase, so be careful when for instance using the Select Table shortcut inside a record form or in direct edit.

Shortcut	Description
Home Screen (Alt+H)	Navigates to your default dashboard, just like clicking Home or clicking the logo in the top-left corr ⚠ Since the home page is an embedded HTML form from outside of the knowledgebase, shor cursor on another area of the system, such as a table or the search box, to reset the focus i
Global Search (Alt+S)	Places the cursor inside the global search box at the top of the screen so you can immediately en
Shortcuts Help (Alt+/)	The Shortcuts help screen displays the current list of keyboard shortcuts for that KB. By default, th Shortcut Help. This screen shows the user's current system shortcuts, including any admin custon



Help Site (Alt+D)	Opens the Agiloft help Wiki at https://wiki.agiloft.com.
My Assigned (Alt+M) and Last Opened (Alt+L)	Opens a popup dialog showing a list of your Assigned and Last Opened records. Use cursor up a or Escape to close the dialog.

Select Table (Alt+T)	Opens a table search dialog box. Enter the table name then select it from the options that appear,
Log Out (Alt+X)	Logs out of the current Knowledgebase.

Table View Shortcuts

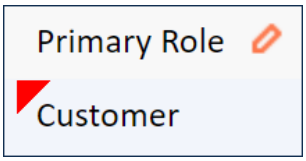
The table view shortcuts allow you to navigate between records in the list, open or delete records, and perform direct editing on them.

Shortcut	Description
Next Page (Alt]) and Previous Page (Alt+[)	In the table view, navigates between pages of records. This is equivalent to clicking Back or Next. 
New Record (Alt+N)	Opens a new record in the table.
View/Edit/Delete Record	View and Edit opens the selected record in view or edit mode. Delete removes the record after a warning dialog appears. To select records, either use your mouse to check the box next to the record, or use the cursor up/down to highlight it and press Space to select.
Cancel (Alt+8) / Finish (Control+Enter) All In-Table Edits	If several Quick Edit fields have been updated but not saved, they are highlighted in the table view. Cancel reverts them back to their previous value, and Finish saves and applies all changes to the records. This is equivalent to Save Changes and Cancel Changes in the action bar.
Cursor Up/Down /Left/Right	Navigates the selection between Quick Edit fields and rows in the table view. These keys are not customizable.
Start Direct Edit (Enter)	Opens the highlighted field for Quick Edit. If it is a choice field, clicking Enter again opens up the list of choices.
Next Field to the Right/Left (Alt+right and Alt+left)	In Quick Edit mode, navigates to the next or previous field and opens it for editing.

Quick Edit with Shortcuts

Keyboard shortcuts make Quick Edit more efficient and powerful. To see how, follow along with this example workflow:

1. In a table view, press the up and down arrows to move between the rows, and use the right and left arrow keys to select the field to edit. A cursor highlights the first direct editable field in the row.

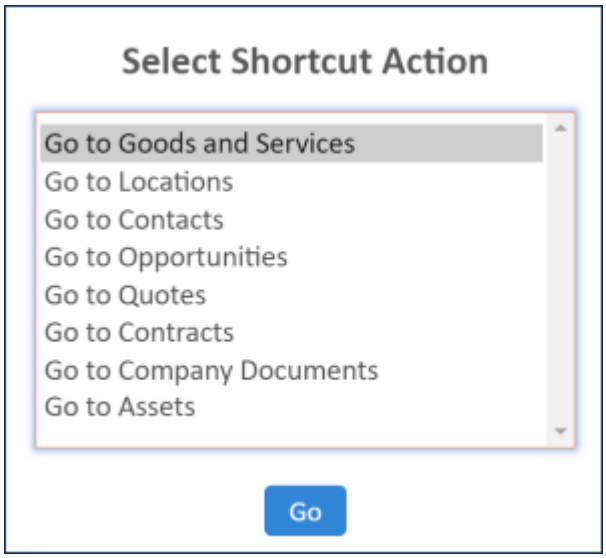
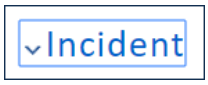


2. Press Enter to open the field for Quick Edit. The field type determines what shortcuts you should use to complete it. For choice fields, press Enter or Space to open the drop-down list, use the up and down arrows to select an item, and press Enter to commit the selection. For multi-select lists, press Ctrl and use the arrows to select multiple values, then press Tab to cycle through Next, Save, or Cancel. For linked fields, press Alt+K to open the lookup. See Field Lookup Shortcuts for more information.
3. Press Escape to leave the direct edit field, or Tab or Shift+Tab to move the cursor between the Next, Save, and Cancel links. To select one of the options, press Enter. The Next Field to the Right/Left shortcuts can also be used to move quickly between direct edit fields.
4. Once you have completed the edits you want to make, press Ctrl+Enter to apply them all, or Alt+8 to cancel all the edits. If a confirmation or warning dialog appears, you use Enter to click OK.

Record Form Shortcuts

In a record form, shortcuts can make field entry and tab navigation much faster.

Shortcut	Description
Highlight Embedded Table (Alt+R)	Opens a popup dialog with a list of all embedded tables in the form. Use the up and down arrows to select a table, and Enter to navigate to it. The embedded table will be highlighted to indicate that it is in focus, similarly to the table view.

	
Previous (Alt+[) / Next (Alt+]) Tab	Navigates between the tabs in the form layout.
Field Selection (Alt+K)	If a field has an action icon, this shortcut performs the action to open the relevant screen. For instance, in a date/time field with a calendar, this shortcut will open the calendar to select a date. In a linked field with a lookup, this shortcut opens the lookup screen.
Save/Finish (Control+Enter)	Saves and closes the record.
Cancel (Alt + 8)	Cancels the record progress and closes it.
Select Linked Field Record (Alt+i)	In a linked field lookup, use the up/down arrows to select a record then use this shortcut to import it into the field. See Field Lookup Shortcuts for more information.
Tab, Enter and Space	Apart from the customizable shortcuts, several keys are commonly used to make it faster to navigate and perform actions. For instance, you can do the following: ■ **Tab** and **Shift+Tab** will move to the next or previous field or other element in the record. ■ **Enter** will apply selected items such as menu drop-downs, open non-editable linked fields for viewing, and also hide or expand the record section if the section heading is in focus.  ■ **Space** will open drop-down menus, select records in an embedded table view, or select items in a multi-select field. ■ **Left/right arrows** will cycle between radio buttons.

Field Lookup Shortcuts

The basic field lookup shortcut workflow happens in this way:

1. In the linked field lookup, press the Field Selection shortcut to open the lookup screen.
2. In the Search field, enter a value, then press Tab, then Space to filter the records.
3. Optionally, navigate between the additional search options and press Space to select them for filtering.
4. Use the Up/Down arrows to navigate between the records, and Select Linked Field Record to import it into the field.