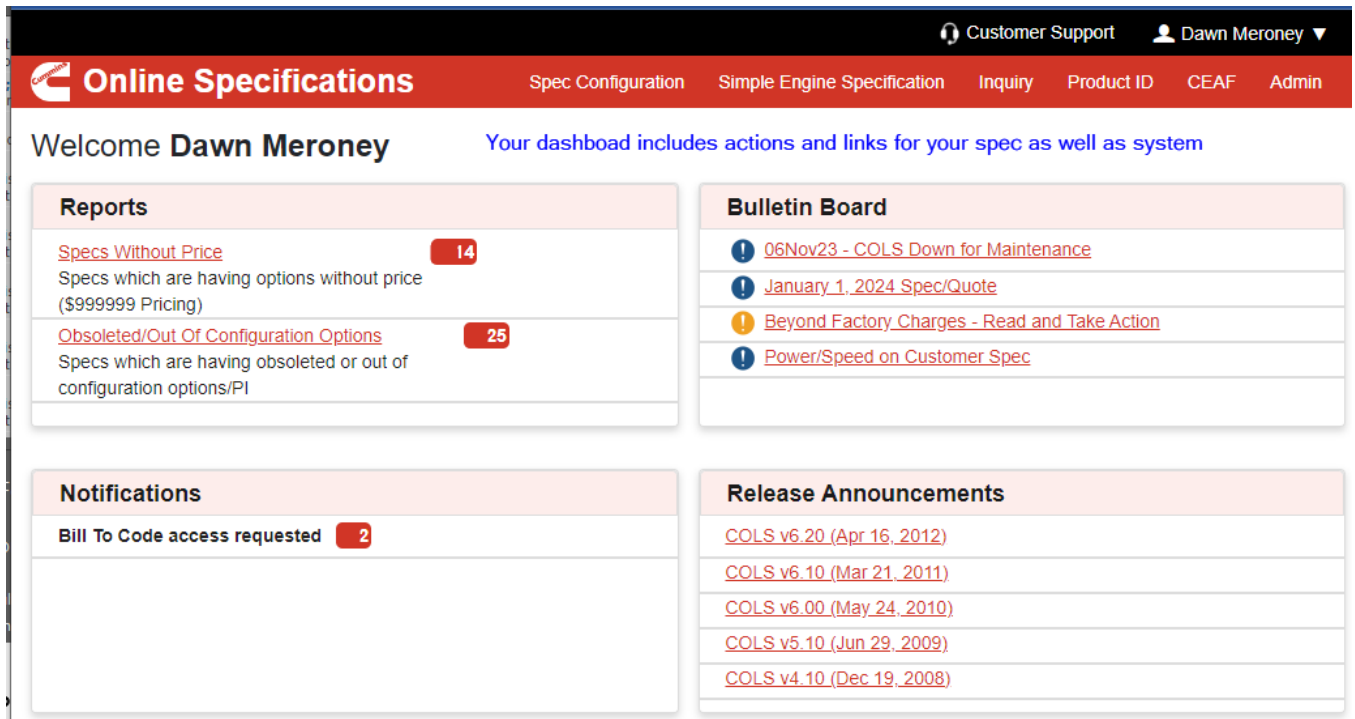The business processes are the same as COLS 1.0 but there are new screens and buttons and a few status definition updates!
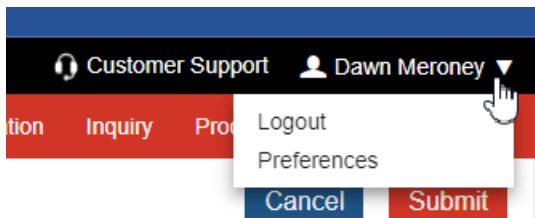
Contents

Getting Started

A dashboard will appear when you first login. It will show you reports with specs that need actions to be taken. You can click on these links to go directly to those specs.

Preferences and Bill-To-Codes can be set and requested using the drop-down menu in the top right corner where your name appears.
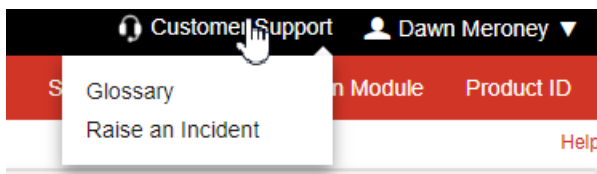

Here, you can set up your preferred email address, your manager's name ad their email address.

This is also where you would remove and request any Bill To Codes, choose to have specs auto archived, and set up Global permissions.

Glossary

The glossary can be found at the top right under customer support.

Spec Creation

New spec status

Spec Status	Quote Status	Comments
Draft	Draft	While Spec & Quote are In Progress
Finished	Finished	Completed / Finalized (sent to IMS)
Released	Released	Acknowledged by IMS and sent to 1-OM (system will pull the spec into 1-OM every 15 minutes)

There are multiple ways to create specs

Simple Engine Specification	CEAF	Inquiry	Spec Configuration

Copy	Search	Create New
COLS Spec	Manage COLS Specs	Multi Spec Change
Price Spec	Manage Price Specs	Compare Specs

Search

Most of the screens now have a search toggle search bar:

Toggle open:

Toggle closed:

Most of the search boxes use smart suggest and require at least 3 characters to be pre-filled in (but you can also type in the entire word!):

If you don't get the results you expected, make sure to clear the spec owner name field!
You can start over by using RESET to clear the fields – but you will need to clear your name again manually.

Things to note:

Showing records – choose how many per page

Pay attention to the Selected view – you can set up a Customized View to see only the columns you like to see

Horizontal sliding scroll bar at the bottom of the list

Customized View

Create your own view and make it your default:

Example search for Jennifer Meier specs by last name:

Search results using my customized view and filtered for 20 records per page:

If your screen is small or you are zoomed in then remember to use the horizontal scroll bar to see the other columns:

If you are unable to open your spec (for now) please change your view back to all and you will get the action toolbar:

Action bar

The action bar can be found at the bottom of the spec window as a "+" sign.
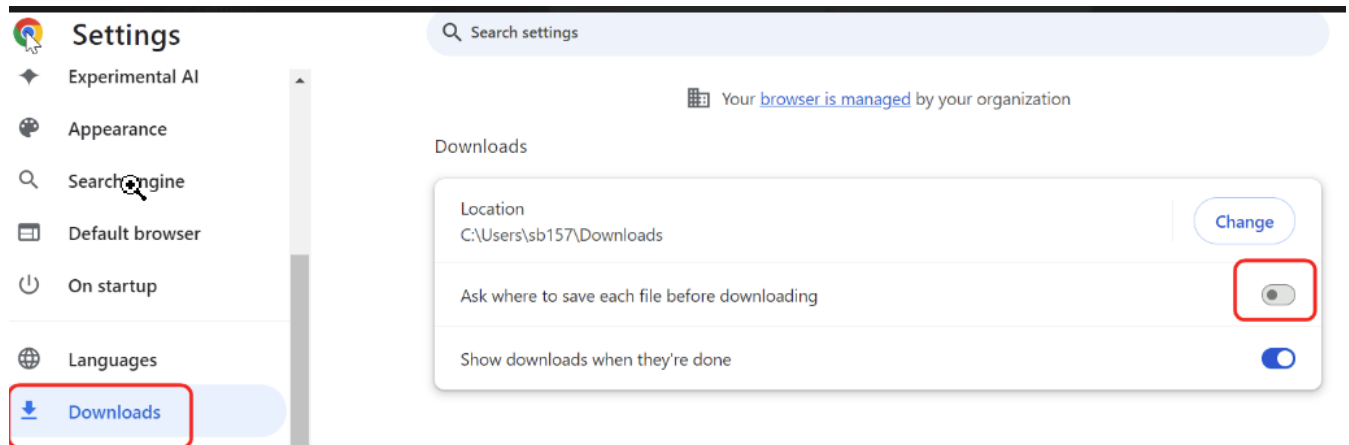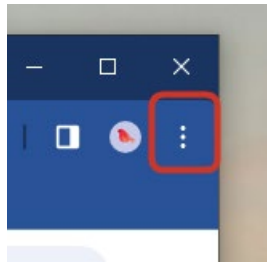
Excel downloads

You can change where your system downloads excel files to.

From your browser choose the 3 dots to the far right on the banner.
Choose 'Settings' down towards the bottom of the list.
Next Choose 'Downloads'.
From here you can choose the folder and a couple other things.

Troubleshooting

Some issues can be resolved by clearing your cached images and files. This is outlined in chronological order below for Google Chrome. Google Chrome is the preferred browser.