

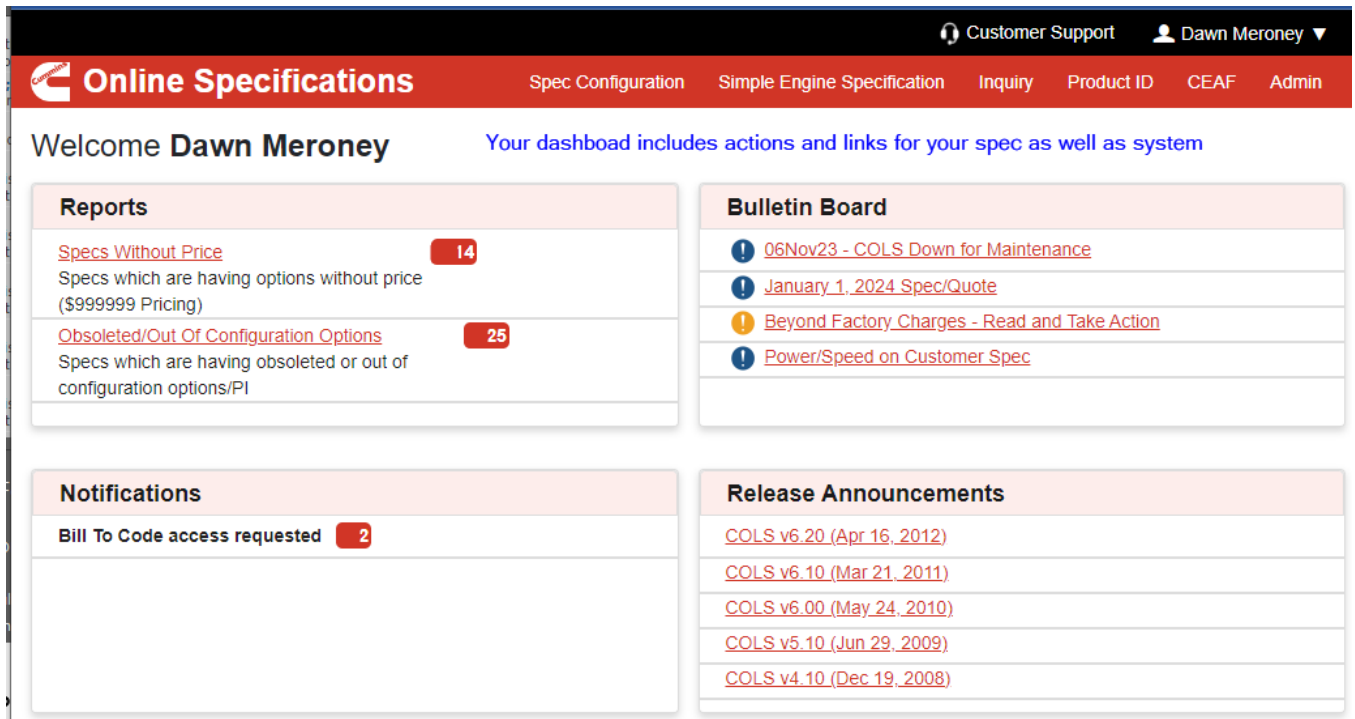
The business processes are the same as COLS 1.0 but there are new screens and buttons and a few status definition updates!

## Contents

- Getting Started ..... 2
  - Preferences ..... 2
- Glossary ..... 2
- Spec Creation ..... 3
- Search ..... 3
- Customized View ..... 5
  - Action bar ..... 7
- Excel downloads ..... 8
- Troubleshooting ..... 8

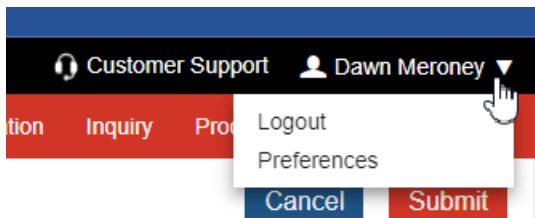
## Getting Started

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.



The screenshot shows the 'Online Specifications' dashboard. At the top, there is a navigation bar with 'Customer Support' and 'Dawn Meroney' (with a dropdown arrow). Below this is a red header with the 'Online Specifications' logo and navigation links: 'Spec Configuration', 'Simple Engine Specification', 'Inquiry', 'Product ID', 'CEAF', and 'Admin'. The main content area is titled 'Welcome Dawn Meroney' and includes a sub-header: 'Your dashboard includes actions and links for your spec as well as system'. There are four main sections: 1. 'Reports' with two items: 'Specs Without Price' (14 items) and 'Obsolete/Out Of Configuration Options' (25 items). 2. 'Bulletin Board' with four items: '06Nov23 - COLS Down for Maintenance', 'January 1, 2024 Spec/Quote', 'Beyond Factory Charges - Read and Take Action', and 'Power/Speed on Customer Spec'. 3. 'Notifications' with one item: 'Bill To Code access requested' (2 items). 4. 'Release Announcements' with five items: 'COLS v6.20 (Apr 16, 2012)', 'COLS v6.10 (Mar 21, 2011)', 'COLS v6.00 (May 24, 2010)', 'COLS v5.10 (Jun 29, 2009)', and 'COLS v4.10 (Dec 19, 2008)'.

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

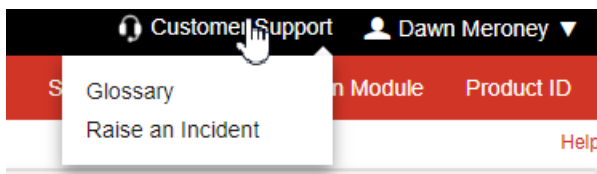


Here, you can set up your preferred email address, your manager's name and their email address.

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

# Search

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

Toggle open:

Customer Support   Dawn Meroney

**Online Specifications**   Simple Engine Specification   CEAF   Inquiry   Spec Configuration   Admin Module   Product ID

Home > Spec Configuration > Copy > Cols Spec

**Search**   [Click in here to toggle the search box open and closed](#)

Adding Search Criteria Will Fetch Faster Results.

<b>Application Type</b> Select Application Type	<b>Customer Code</b> Eg 00152	<b>Certification Level</b> Select Certification Level	<b>Bill To Code</b> Eg 00003
<b>Product ID</b> Eg ACRB00001	<b>Configuration Number</b> Eg D071002BX01	<b>Option Number</b> Eg AB0100100	<b>Spec Name</b> Eg 499EABCF
<b>Spec Status</b> Active	<b>Shop Order</b> Eg SO76200	<b>ESN</b>	<b>IQA/RER</b> Eg IQA-17-100
<b>Spec Owner</b> CA970 - Dawn Meroney			

⊕ Advance Search

Search   Reset

Toggle closed:

Customer Support   Dawn Meroney

**Online Specifications**   Simple Engine Specification   CEAF   Inquiry   Spec Configuration   Admin Module   Product ID

Home > Spec Configuration > Copy > Cols Spec

**Search**

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!):

The screenshot shows the 'Online Specifications' search interface. The search bar contains the text '025'. A dropdown menu is open, displaying a list of suggestions: 00025, 00250, 00251, 00252, 00253, 00254, and 00255. The 'Reset' button is circled in blue. The interface includes various search filters such as Application Type, Product ID, Spec Status, Spec Owner, Certification Level, Option Number, ESN, Bill To Code, Spec Name, and IQA/RER.

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

The screenshot shows the search results page for 'Online Specifications'. The table displays 10 records out of 4132. A yellow box highlights the '10 Items/Page' dropdown. A yellow box highlights the 'Sliding bar' at the bottom of the table. The table columns include Select, Customer Spec Name, COLS ID, Structure Status, Quote Status, Bill To Code, Customer Code, Customer Name, Marketing Model Name, Configuration Number, and Action.

Select	Customer Spec Name	COLS ID	Structure Status	Quote Status	Bill To Code	Customer Code	Customer Name	Marketing Model Name	Configuration Number	Action
<input type="checkbox"/>	Test260	202402060007	Draft	-	02500	02500	COLS & CSL CUSTOMER CODE	L9 380	D563027BX03	More...
<input type="checkbox"/>	TabTest	202402060006	Draft	-	02500	02500	COLS & CSL CUSTOMER CODE	DUMM_ORANGE	D2C3003BX03	More...
<input type="checkbox"/>	Invalid Price Test	202402060002	Draft	-	02500	02500	COLS & CSL CUSTOMER CODE	DEMO PID	D313011MX03	More...
<input type="checkbox"/>	Test_D103015CX03	202311090018	Finished	Draft	02500	02500	COLS & CSL CUSTOMER CODE	QXS15 500	D103015CX03	More...
<input type="checkbox"/>	Test Product Obsolut	202401300034	Draft	-	02500	02500	COLS & CSL CUSTOMER CODE	QSM11	D353020CX03	More...
<input type="checkbox"/>	Spec1_RM_Dependent	202402050018	Finished	Finished	02500	02500	COLS & CSL CUSTOMER CODE	ISL8.9E5320	D563020BX03	More...
<input type="checkbox"/>	Quote_Test_YP_0131	202401310074	Draft	Finished	02500	02500	COLS & CSL CUSTOMER CODE	QSB6.7480HOI	D313011MX03	More...
<input type="checkbox"/>	TestInng export exce	202401190002	Draft	-	02500	02500	COLS & CSL CUSTOMER CODE	6CTA8.3-C	D413037CX02	More...
<input type="checkbox"/>	TESTPopup	202402050009	Finished	Finished	02500	02500	COLS & CSL CUSTOMER CODE	X15	D103015CX03	More...
<input type="checkbox"/>	test 2454	202401300022	Draft	Draft	02500	02500	COLS & CSL CUSTOMER CODE	X15	D103015CX03	More...

# Customized View

Create your own view and make it your default:

**Customize View**
✕

Select View Name: DMHome Default View  Create View Edit View

Limited to 5 customized views with a minimum of 5 or more columns selected.

Select All

<input checked="" type="checkbox"/> Customer Spec Name	<input checked="" type="checkbox"/> COLS ID	<input checked="" type="checkbox"/> Structure Status
<input checked="" type="checkbox"/> Quote Status	<input type="checkbox"/> Bill To Code	<input checked="" type="checkbox"/> Customer Code
<input type="checkbox"/> Customer Name	<input type="checkbox"/> Engine Model Name	<input checked="" type="checkbox"/> Configuration Number
<input checked="" type="checkbox"/> Certification Level	<input type="checkbox"/> Plant	<input type="checkbox"/> Structure Owner
<input type="checkbox"/> Structure Last Modified By	<input checked="" type="checkbox"/> Structure Modified Date	<input type="checkbox"/> Quote Owner
<input checked="" type="checkbox"/> Quote Modified Date	<input checked="" type="checkbox"/> Quote Last Modified By	<input type="checkbox"/> Upload Date
<input type="checkbox"/> IQA/RER	<input type="checkbox"/> IQA Consumed Quantity	<input type="checkbox"/> SSA
<input type="checkbox"/> Marketing Program	<input checked="" type="checkbox"/> Total Price	<input type="checkbox"/> Validation Status

Exit

Example search for Jennifer Meier specs by last name:

**Online Specifications**
Simple Engine Specification   CEF   Inquiry   Spec Configuration   Admin Module   Product ID

Home > Spec Configuration > Search > Manage Cols Specs

**Search** Adding Search Criteria Will Fetch Faster Results.

<b>Application Type</b> <input type="text" value="Select Application Type"/>	<b>Customer Code</b> <input type="text" value="02500-COLS &amp; CSL CUSTOMER CO"/>	<b>Bill To Code</b> <input type="text" value="Eg 00003"/>	<b>Certification Level</b> <input type="text" value="Select Certification Level"/>
<b>Product ID</b> <input type="text" value="Eg ACRB00001"/>	<b>Configuration Number</b> <input type="text" value="Eg D071002BX01"/>	<b>Option Number</b> <input type="text" value="Eg AB0100100"/>	<b>Spec Name</b> <input type="text" value="Eg 499EABCF"/>
<b>Spec Status</b> <input type="text" value="Active"/>	<b>Shop Order</b> <input type="text" value="Eg SO76200"/>	<b>ESN</b> <input type="text"/>	<b>IQA/RER</b> <input type="text" value="Eg IQA-17-100"/>
<b>Special Sales Allowance</b> <input type="text" value="Eg 0AC2861"/>	<b>Marketing Program</b> <input type="text" value="Eg M01102"/>	<b>Spec Owner</b> <input type="text" value="Meier"/>	

Search Reset

Showing records 1-10 of 4132

Select	Customer Spec Name	COLS ID	Structure Status	Quote Status	Customer Code	Configuration Number	Certification Level	Structure Last Modified Date	Quote Last Modified Date	Quote La
<input type="checkbox"/>	Test260	202402060007	Draft	-	02500	D563027BX03	-	FEB 06, 2024	-	-
<input type="checkbox"/>	TabTest	202402060006	Draft	-	02500	D2C3003BX03	Non Certified	FEB 06, 2024	-	-
<input type="checkbox"/>	Invalid Price Test	202402060002	Draft	-	02500	D313011MX03	-	FEB 06, 2024	-	-
<input type="checkbox"/>	Test_D103015CX03	202311090018	Finished	Draft	02500	D103015CX03	Non Certified	FEB 05, 2024	DEC 27, 2023	SB157-Sa

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

**Online Specifications** Simple Engine Specification CEAF Inquiry Spec Configuration Admin Module Product ID

Home > Spec Configuration > Search > Manage Cols Specs

Search

Showing records 1-20 of 58 **20 Items/Page** Select View **DMHome** **Customize View**  Enable Filter

Select	Customer Spec Name ↑	COLS ID ↑	Structure Status ↑	Quote Status ↑	Customer Code ↑	Configuration Number ↑	Certification Level ↑	Structure Last Modified Date ↑	Quote Last Modified Date ↑	Quote Last Modified By ↑	Total Price ↑
<input type="checkbox"/>	09oct23-jlm-a	202310090021	Draft	Draft	02500	D313030BX03	Euro 6	FEB 01, 2024	OCT 09, 2023	AS026-Jennifer Meier	3,006,599.00
<input type="checkbox"/>	testjlm030123b	202303010074	Draft	-	02500	D313038BX03	-	FEB 01, 2024	-	-	-
<input type="checkbox"/>	test-jlm-31oct23j	202310310045	Draft	-	02500	D0F3006CX03	Exemption	JAN 12, 2024	-	-	-
<input type="checkbox"/>	test-jlm-31oct23d	202310310041	Draft	-	02500	D0F3006CX03	Exemption	JAN 12, 2024	-	-	-
<input type="checkbox"/>	testjlm030123f	202303010081	Draft	-	02500	D313038BX03	-	JAN 11, 2024	-	-	-
<input type="checkbox"/>	test-jlm-09jan24a	202401090040	Draft	-	02500	D313011MX03	Tier 3, RCDII	JAN 09, 2024	-	-	-
<input type="checkbox"/>	test500922a	202205090107	Draft	Draft	02500	D313011MX03	Tier 3, RCDII	JAN 05, 2024	JUL 26, 2022	AS026-Jennifer Meier	27,848.00
<input type="checkbox"/>	testjlm03012023	202303010073	Draft	-	02500	D313038BX03	-	JAN 04, 2024	-	-	-
<input type="checkbox"/>	test-01mar23c	202303010076	Draft	-	02500	D313038BX03	2021MH PACCAR	JAN 04, 2024	-	-	-
<input type="checkbox"/>	testjlmC01-00332-003	202303010112	Draft	-	02500	D313038BX03	2021MH	JAN 04, 2024	-	-	-
<input type="checkbox"/>	test030123d	202303010077	Draft	-	02500	D313038BX03	-	JAN 04, 2024	-	-	-
<input type="checkbox"/>	test-jlm-30sep22	202209300095	Finished	-	02500	D563012CX03	Tier 4i Stage IIIA	JAN 03, 2024	-	-	-
<input type="checkbox"/>	test-jlm-20sep-2	202309200020	Finished	Draft	02500	D563012CX03	Tier 4i Stage IIIA	JAN 03, 2024	SEP 20, 2023	-	19,446.00
<input type="checkbox"/>	test-jlm-11dec23a	202312110005	Draft	-	02500	D313027CX03	Replacement	DEC 11, 2023	-	-	-
<input type="checkbox"/>	test-jlm-31may23a	202305310098	Draft	Finished	02500	D193104CX03	Non Certified	NOV 15, 2023	MAY 31, 2023	AS026-Jennifer Meier	65,307.00
<input type="checkbox"/>	test-jlm-03oct23b	202310030017	Draft	-	02500	D103019BX03	-	NOV 15, 2023	-	-	-
<input type="checkbox"/>	test-jlm-06nov23b	202311060032	Draft	-	02500	D383063BX03	-	NOV 06, 2023	-	-	-
<input type="checkbox"/>	test-jlm-06nov23a	202311060031	Draft	-	02500	D383063BX03	-	NOV 06, 2023	-	-	-
<input type="checkbox"/>	test-jlm-31oct23b	202310310037	Draft	-	02500	D2C3003BX03	-	OCT 31, 2023	-	-	-
<input type="checkbox"/>	test-jlm-31oct23a	202310310032	Draft	-	02500	D2C3003BX03	-	OCT 31, 2023	-	-	-

« 1 2 3 » 1 Jump

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

**Online Specifications** Simple Engine Specification CEAF Inquiry Spec Configuration Admin Module Product ID

Home > Spec Configuration > Search > Manage Cols Specs

Search

Showing records 1-10 of 58 **10 Items/Page** Select View **DMHome** **Customize View**  Enable Filter

Select	Customer Spec Name ↑	COLS ID ↑	Structure Status ↑	Quote Status ↑	Customer Code ↑	Configuration Number ↑	Certification Level ↑	Structure Last Modified Date
<input type="checkbox"/>	09oct23-jlm-a	202310090021	Draft	Draft	02500	D313030BX03	Euro 6	FEB 01, 2024
<input type="checkbox"/>	testjlm030123b	202303010074	Draft	-	02500	D313038BX03	-	FEB 01, 2024
<input type="checkbox"/>	test-jlm-31oct23j	202310310045	Draft	-	02500	D0F3006CX03	Exemption	JAN 12, 2024
<input type="checkbox"/>	test-jlm-31oct23d	202310310041	Draft	-	02500	D0F3006CX03	Exemption	JAN 12, 2024
<input type="checkbox"/>	testjlm030123f	202303010081	Draft	-	02500	D313038BX03	-	JAN 11, 2024
<input type="checkbox"/>	test-jlm-09jan24a	202401090040	Draft	-	02500	D313011MX03	Tier 3, RCDII	JAN 09, 2024
<input type="checkbox"/>	test500922a	202205090107	Draft	Draft	02500	D313011MX03	Tier 3, RCDII	JAN 05, 2024
<input type="checkbox"/>	testjlm03012023	202303010073	Draft	-	02500	D313038BX03	-	JAN 04, 2024
<input type="checkbox"/>	test-01mar23c	202303010076	Draft	-	02500	D313038BX03	2021MH PACCAR	JAN 04, 2024
<input type="checkbox"/>	testjlmC01-00332-003	202303010112	Draft	-	02500	D313038BX03	2021MH	JAN 04, 2024

« 1 2 3 4 5 6 » 1 Jump

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

Online Specifications

Home > Spec Configuration > Search > Manage Cols Specs

Search

Showing records 1-10 of 58 10 Items/Page

Select View **DMHome** Customize View Enable Filter

Export

Select	Customer Spec Name ↑	COLS ID ↑	Structure Status ↑	Quote Status ↑	Customer Code ↑	Configuration Number ↑	Certification Level ↑
<input type="checkbox"/>	09oct23-jlm-a	202310090021	Draft	Draft	02500	D313030BX03	Euro 6
<input type="checkbox"/>	testjlm030123b	202303010074	Draft	-	02500	D313038BX03	-

Online Specifications

Home > Spec Configuration > Search > Manage Cols Specs

Search

Showing records 1-10 of 58 10 Items/Page

Select View **ALL** Customize View Enable Filter

Export

Select	Customer Spec Name ↑	COLS ID ↑	Structure Status ↑	Quote Status ↑	Bill To Code ↑	Customer Code ↑	Customer Name ↑	Action
<input type="checkbox"/>	09oct23-jlm-a	202310090021	Draft	Draft	02500	02500	COLS & CSL CUSTC	
<input type="checkbox"/>	testjlm030123b	202303010074	Draft	-	02500	02500	COLS & CSL CUSTC	

### Action bar

The action bar can be found at the bottom of the spec window as a “+” sign.

Price UD ↑

28,259.00

0.00

Price UD ↑

28,259.00

0.00

Policy | Terms & Conditions

Change Plant

## Excel downloads

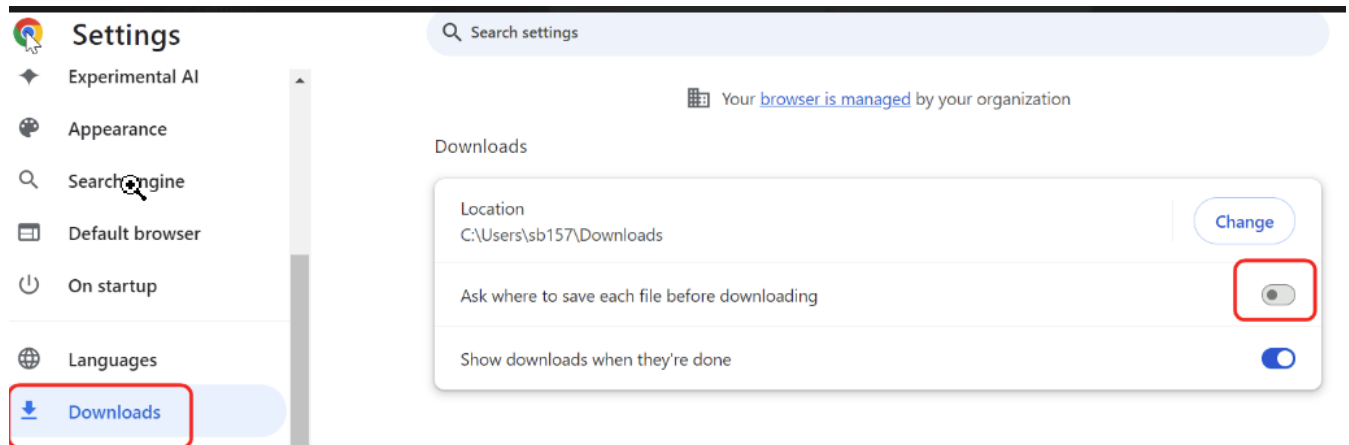
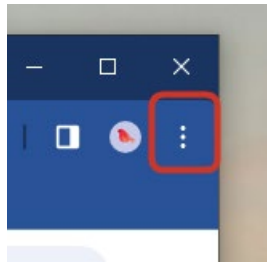
You can change where your system downloads excel files to.

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.

