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This document contains no export controlled technical data

## Key Items to Note

Customers who access the Case Management Customer Portal may filter their Cases by creating list views.

Below are some key items to understand before you start to create List Views.

### List Views - Key Items

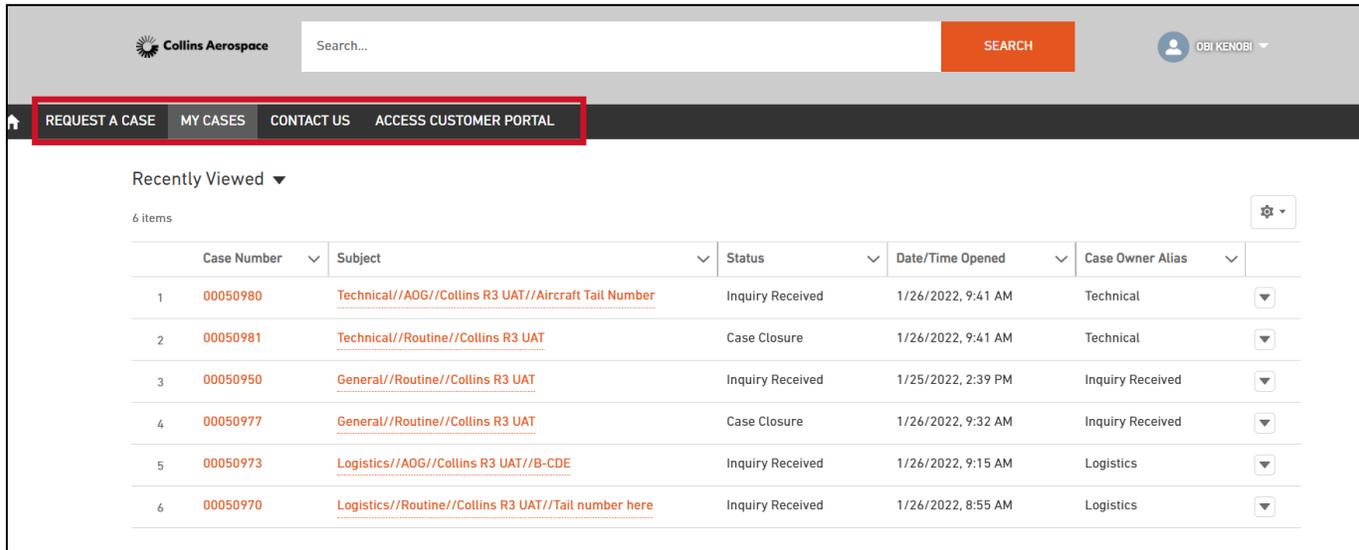
**Customers** do **not** “own” **Cases** they create in the portal. Cases created by customers are owned by one of the following **Case Owner Aliases**:

- **Technical:** Tech Assistance.
- **Logistics:** Parts Request
- **Inquiry Received:** Other

When you create a list view, you **must** change **Filter By Owner** to **All Cases**, as you do not technically own Cases you create.

## Create a List View

- From the Portal, click on **My Cases**.

Collins Aerospace Search... SEARCH OBI KENDEI

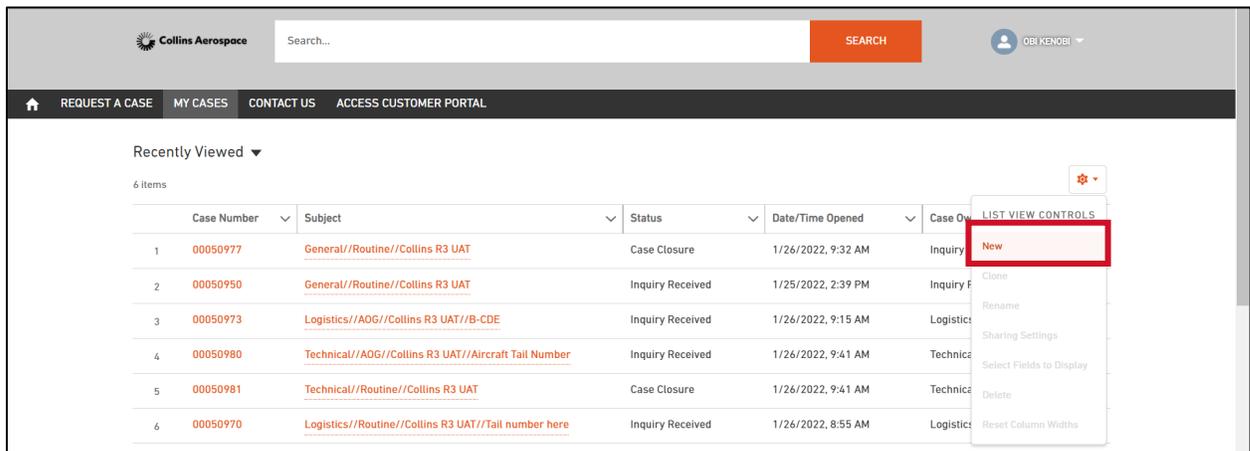
REQUEST A CASE **MY CASES** CONTACT US ACCESS CUSTOMER PORTAL

Recently Viewed ▾  
6 items

|   | Case Number | Subject  | Status           | Date/Time Opened   | Case Owner Alias |
|---|-------------|--|------------------|--------------------|------------------|
| 1 | 00050980    | Technical//AOG//Collins R3 UAT//Aircraft Tail Number | Inquiry Received | 1/26/2022, 9:41 AM | Technical        |
| 2 | 00050981    | Technical//Routine//Collins R3 UAT                   | Case Closure     | 1/26/2022, 9:41 AM | Technical        |
| 3 | 00050950    | General//Routine//Collins R3 UAT                     | Inquiry Received | 1/25/2022, 2:39 PM | Inquiry Received |
| 4 | 00050977    | General//Routine//Collins R3 UAT                     | Case Closure     | 1/26/2022, 9:32 AM | Inquiry Received |
| 5 | 00050973    | Logistics//AOG//Collins R3 UAT//B-CDE                | Inquiry Received | 1/26/2022, 9:15 AM | Logistics        |
| 6 | 00050970    | Logistics//Routine//Collins R3 UAT//Tail number here | Inquiry Received | 1/26/2022, 8:55 AM | Logistics        |

- The Cases you created display.

- Click the **gear**  in the top right hand-side of the screen, click **New**.



Collins Aerospace Search... SEARCH OBI KENDEI

REQUEST A CASE MY CASES CONTACT US ACCESS CUSTOMER PORTAL

Recently Viewed ▾  
6 items

|   | Case Number | Subject  | Status           | Date/Time Opened   | Case Owner Alias |
|---|-------------|--|------------------|--------------------|------------------|
| 1 | 00050977    | General//Routine//Collins R3 UAT                     | Case Closure     | 1/26/2022, 9:32 AM | Inquiry Received |
| 2 | 00050950    | General//Routine//Collins R3 UAT                     | Inquiry Received | 1/25/2022, 2:39 PM | Inquiry Received |
| 3 | 00050973    | Logistics//AOG//Collins R3 UAT//B-CDE                | Inquiry Received | 1/26/2022, 9:15 AM | Logistics        |
| 4 | 00050980    | Technical//AOG//Collins R3 UAT//Aircraft Tail Number | Inquiry Received | 1/26/2022, 9:41 AM | Technical        |
| 5 | 00050981    | Technical//Routine//Collins R3 UAT                   | Case Closure     | 1/26/2022, 9:41 AM | Technical        |
| 6 | 00050970    | Logistics//Routine//Collins R3 UAT//Tail number here | Inquiry Received | 1/26/2022, 8:55 AM | Logistics        |

LIST VIEW CONTROLS

- New**
- Clone
- Rename
- Sharing Settings
- Select Fields to Display
- Delete
- Reset Column Widths

- In the **New List View** box, type a **List Name**. Make sure the name describes your list view's filter criteria.

## New List View

---

**\* List Name**

Inquiry Received

Who sees this list view?

Only I can see this list view  
 All users can see this list view ⓘ  
 Share list view with groups of users ⓘ

Cancel
Save

5. Click **Save**.
6. The following appears.

Inquiry Received ▾

0 items • Sorted by Case Number • Filtered by My cases ⚙️ ▾

| Case Num... ↑ ▾ | Contact Name ▾ | Subject ▾ | Status ▾ | Priority ▾ | Case Owner... ▾ |  |
|-----------------|----------------|-----------|----------|------------|-----------------|--|
|                 |                |           |          |            |                 | <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">                     Filter by Owner<br/>                     My cases                 </div> <p style="font-size: x-small; margin: 0;"> <span style="color: #e67e22;">Add Filter</span> <span style="float: right; color: #e67e22;">Remove All</span> </p> |

7. Click on **Filter by Owner** and change it to **All Cases**, click **Done**. If you do not make this change, then no records display after you save the list view.

Filter by Owner

All cases  
 My cases  
 My case teams  
 Queue owned cases

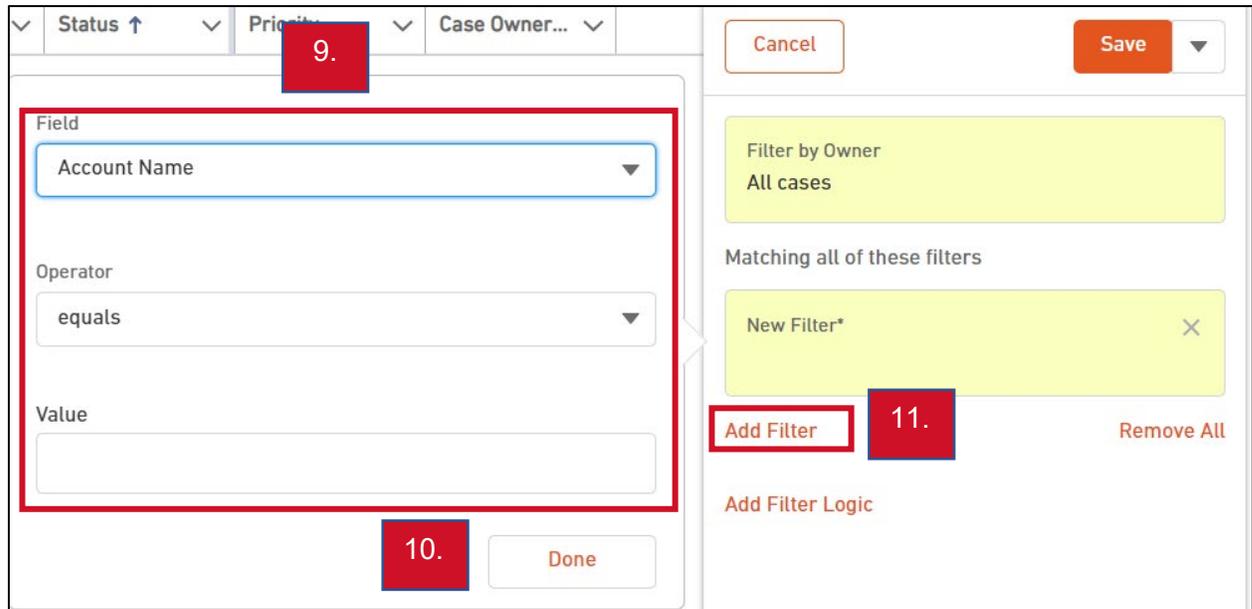
Done

Filters ✕

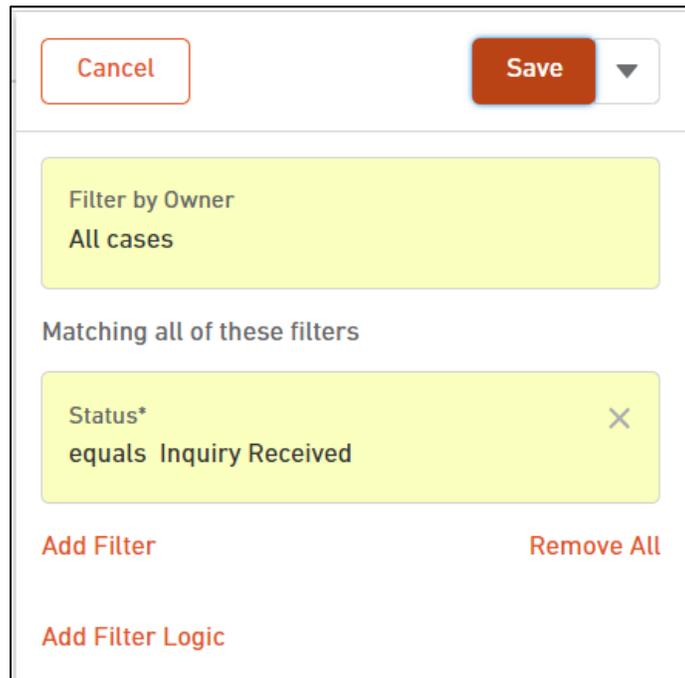
Filter by Owner  
 My cases

Add Filter
Remove All

- Click **Add Filter** to add more criteria to your list.



- Select the **Field** to filter on by clicking the dropdown and scrolling through the list of fields, **Operator** and **Value**. (See table below for descriptions of these options.)
- Click **Done**.
- Continue to add more filters using **Add Filter**.
- The following displays based on the example used.



- Click **Cancel** to dismiss the creation of the list view or click **Save** to save the list.

14. Click **X** to close the filters pane.

**Filters** X

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Filter by Owner  
All cases

Matching all of these filters

Status equals Inquiry Received X

**Add Filter** **Remove All**

**Add Filter Logic**

15. The following displays.

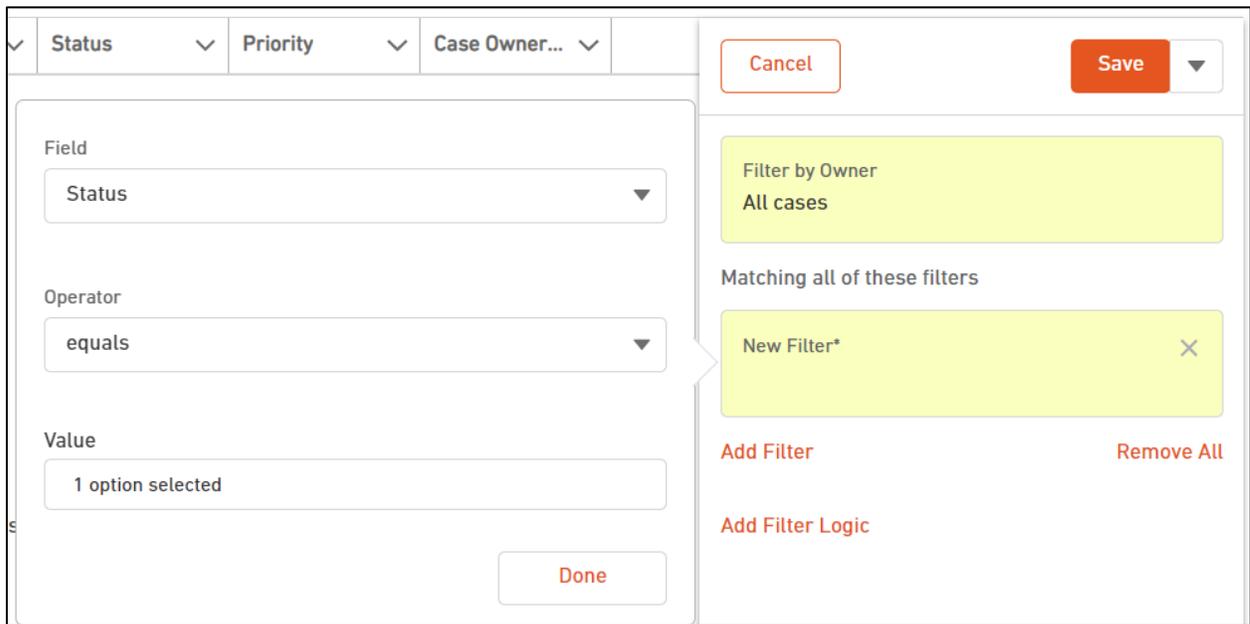
| Inquiry Received ▼   |              |                |   |                  |                  |                  |   |
|--|--------------|----------------|---|------------------|------------------|------------------|---|
| 4 items • Sorted by Case Number • Filtered by All cases - Status |              |                |   |                  |                  |                  |   |
| Case Nu...   | Contact Name | Subject        | Status  | Priority         | Case Owner Alias |                  |   |
| 1  | 00050950     | Obi Wan Kenobi | General//Routine//Collins R3 UAT                    | Inquiry Received | Routine          | Inquiry Received | ▼ |
| 2  | 00050970     | Obi Wan Kenobi | Logistics//Routine//Collins R3 UAT//Tail number ... | Inquiry Received | Routine          | Logistics        | ▼ |
| 3  | 00050973     | Obi Wan Kenobi | Logistics//AOG//Collins R3 UAT//B-CDE               | Inquiry Received | AOG              | Logistics        | ▼ |
| 4  | 00050980     | Obi Wan Kenobi | Technical//AOG//Collins R3 UAT//Aircraft Tail Nu... | Inquiry Received | AOG              | Technical        | ▼ |

## Filter Items with Descriptions

| Filter Item        | Description   |
|--------------------|---|
| 1. <b>Field</b>    | Select a field to filter by from the dropdown. When you click on this field, more fields display than you have access to. The table below displays the fields you are able to filter on and display in a list view. |
| 2. <b>Operator</b> | Select the proper operator; <b><i>equals, not equal to, greater than, less than, greater or equal, less or equal, contains, does not contain, starts with</i></b>   |
| 3. <b>Value</b>    | Type your filter criteria or select from a list.  |

Example below:

***Filter: Status equals Inquiry Received***



- In the screenshot above, the Value displays as 1 option selected. The Status field is a picklist or dropdown field from which the customer selects a value. In this example, Inquiry Received was selected, though you do not see that value in the screenshot.
- If the Field is a text field, then type the value you would like to filter on.

## Fields Available to Filter By or Display in Your List Views

| Fields Available to Filter By or Display |  |
|--|--|
| Status                                   | MEL Start Date (web)                   |
| Priority                                 | Delayed Prevention (web)               |
| Date/Time Opened                         | Detailed Description                   |
| Due Date                                 | Contact Name                           |
| RTS Date                                 | Account Name                           |
| Short Description                        | Contact Email                          |
| Aircraft Location (web)                  | Record Type Name                       |
| Engine Type (web)                        | Maintenance Message Involved (web)     |
| Aircraft Tail / Reg OR Serial (web)      | Flight Hour Agreement Contract (web)   |
| MEL Number, Description, Duration (web)  | Freight Forwarder Name (web)           |
| Case Owner Alias                         | Freight Forwarder Account Number (web) |

## Using Filter Logic

- When you add filter logic, you have the ability to filter on more than one field.
- When you filter on more than one field, there is an implied AND between the filters.
- If you need to change the logic to include OR or NOT, use Filter Logic.

### Example below:

***You want to see a list of your Cases that are either Technical or Logistics.***

When building the filters, click Filter Logic to modify the logic to use OR, NOT and AND.

Add Filter Logic

Cancel
Save ▼

Filter by Owner  
 All cases

Matching these filters

1. Case Owner Alias\* equals Technical ✕

2. Case Owner Alias\* equals Logistics ✕

Add Filter
Remove All

Filter Logic i Remove

1 OR 2

After saving the filters, the following displays.

Both Technical and Logistics Cases display in the list.

Technical and Logistic Cases ⚙️

4 items • Sorted by Case Number • Filtered by All cases - Case Owner Alias

| Ca... | Contact N... | Subject  | Status           | Pri...  | Cas...    |
|-------|--------------|--|------------------|---------|-----------|
| 1     | 000509...    | Obi Wan Kenobi <a href="#">Logistics//Routine//Collins R3 UAT//...</a> | Inquiry Received | Routine | Logistics |
| 2     | 000509...    | Obi Wan Kenobi <a href="#">Logistics//AOG//Collins R3 UAT//B-C...</a>  | Inquiry Received | AOG     | Logistics |
| 3     | 000509...    | Obi Wan Kenobi <a href="#">Technical//AOG//Collins R3 UAT//Air...</a>  | Inquiry Received | AOG     | Technical |
| 4     | 000509...    | Obi Wan Kenobi <a href="#">Technical//Routine//Collins R3 UAT</a>      | Case Closure     | Routine | Technical |

Filters ✕

Filter by Owner  
 All cases

Matching these filters

1. Case Owner Alias equals Technical ✕

2. Case Owner Alias equals Logistics ✕

Add Filter
Remove All

Filter Logic i Remove

1 OR 2

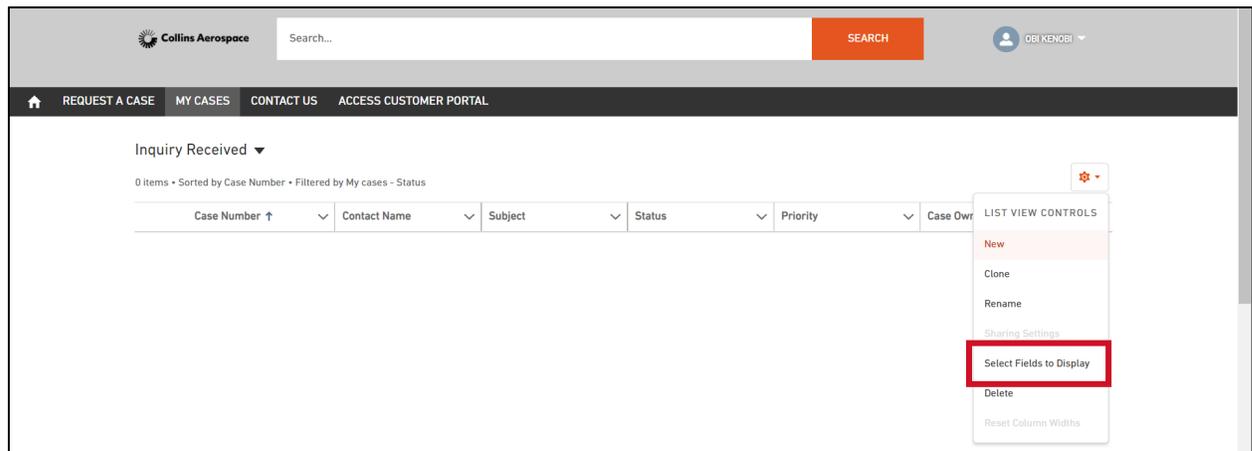
9

If at any time you need immediate assistance or response, do not hesitate to reach out to our 24/7 Customer Response Center, 1-877-808-7575 or [crc@collins.com](mailto:crc@collins.com)

## Add Other Columns to Display

After you save a new list view, you may want to add other columns to display information when you use the list view. Review the “**Fields Available to Filter By or Display**” table in this document for the list of columns available to display.

1. Make sure you are viewing the list view to which you want to add columns.
2. Click the **gear** and select **Fields to Display**.



3. The following displays.
4. Currently displayed columns are listed in the **Visible Fields** section.

### Select Fields to Display

| Available Fields                    |   | Visible Fields   |
|-------------------------------------|---|------------------|
| Account Name                        | ▶ | Case Number      |
| Aircraft Location (web)             | ◀ | Contact Name     |
| Aircraft Serial                     |   | Subject          |
| Aircraft Tail                       |   | Status           |
| Aircraft Tail / Reg OR Serial (web) |   | Priority         |
| Airport IATA                        |   | Case Owner Alias |
| Cancellation Reason (web)           |   |                  |

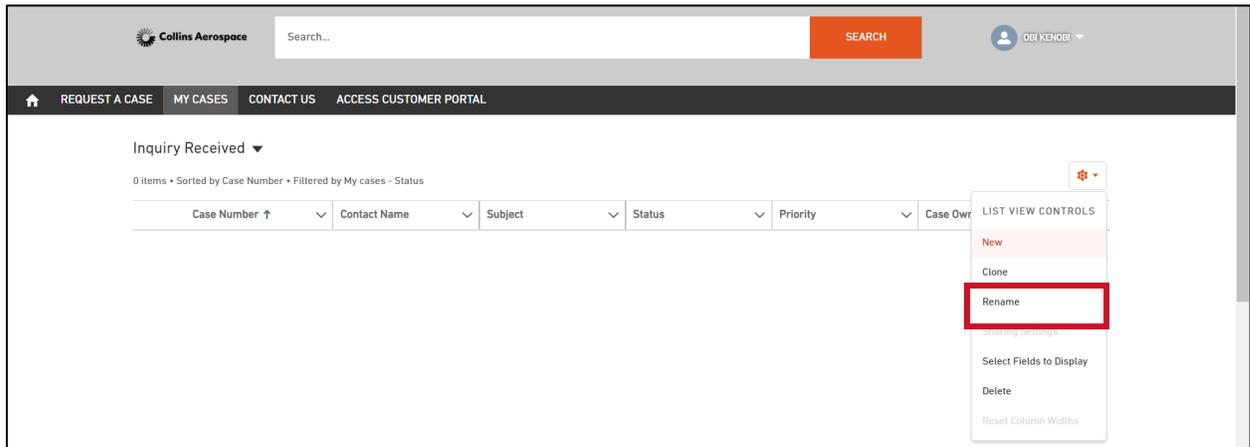
Cancel Save

5. Select a field from the **Available Fields** section and click the **right facing triangle** to make it visible in the list view.
6. Select a field from the **Visible Fields** section and click the **left facing triangle** to remove it from visibility.
7. To change the order of the columns displayed, select the field to move from the **Visible Fields** section, click the **up** and **down triangle**.
8. Click **Save**.

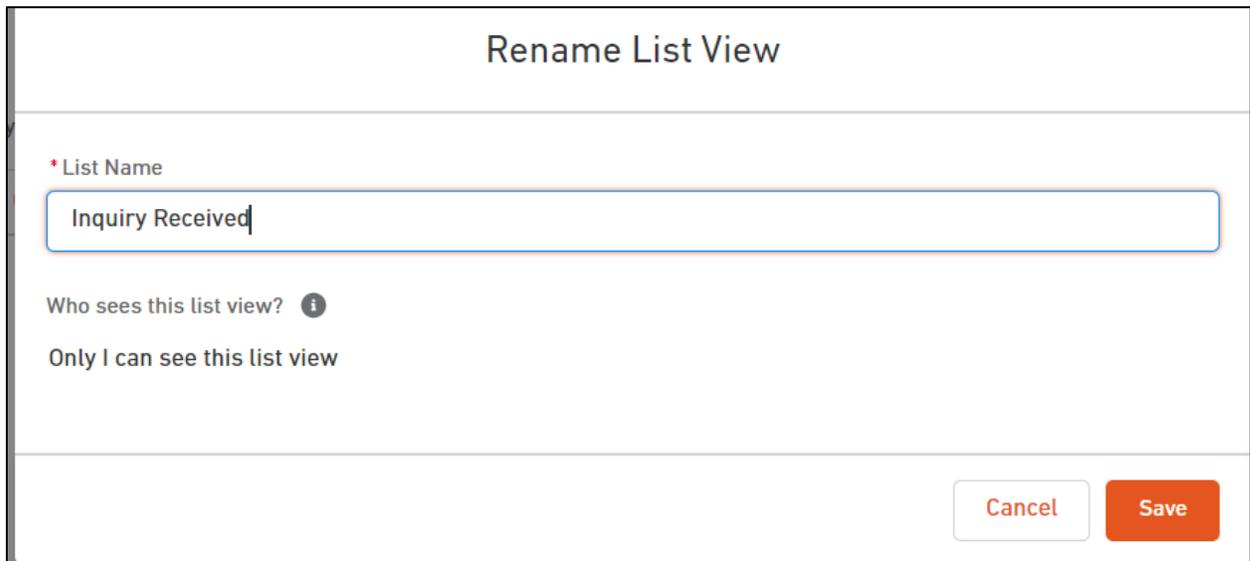
## Rename a List View

You have the ability to rename a list view at any time.

1. Make sure you are viewing the list view you want to rename.
2. Click the **gear** and select **Rename**.



3. Update with a new **List Name** and click **Save**.

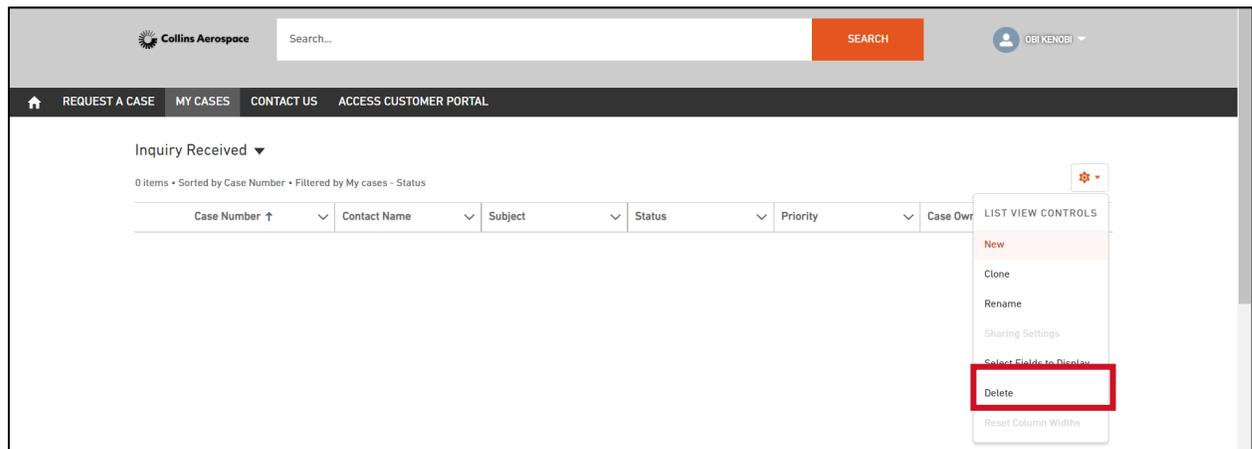


The screenshot shows the 'Rename List View' dialog box. The title is 'Rename List View'. Below the title, there is a field for '\* List Name' containing the text 'Inquiry Received'. Below this field, there is a section for 'Who sees this list view?' with an information icon. The selected option is 'Only I can see this list view'. At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red border.

## Delete a List View

You have the ability to delete a list view that **you created** at any time.

1. Make sure you are viewing the list view you want to rename.
2. Click the **gear** and select **Delete**.



3. The following box displays. Click **Delete**.
4. If you click **Cancel**, the list view remains.

