

WestTrac



S°O°S Web Help Guide

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HELP GUIDE INDEX

DASHBOARD

- [Selecting Widgets to Display](#)
- [Arranging and Sizing Widgets](#)
- [Dashboard Widget Descriptions](#)
 - [Alert Levels Widgets](#)
 - [Due/Overdue Assets Widget](#)
 - [Quick Search Widget](#)
 - [Recently Sampled Assets Widget](#)
 - [Recently Submitted Samples Widget](#)
 - [Sample in Progress Widget](#)
 - [Sample Status Widget](#)
 - [Welcome Widget](#)

FLEET

- [Using the Fleet Page](#)
- [Fleet Page Common Features and Functions](#)
 - [Sorting and Filtering via Column Headers](#)
 - [Arranging Columns](#)
 - [Sizing Columns](#)
- [Navigating and Managing Sample Lists](#)
- [Using Advanced Filters](#)
- [Asset Tab Features and Functions](#)
 - [Adding an Asset](#)
 - [Modifying an Asset](#)
- [Components Tab Features and Functions](#)
 - [Submitting Component Samples](#)
 - [Using the Compare Graph Feature](#)
- [Asset Details View Features and Functions](#)
 - [Adding a Fluid Maintenance Event](#)

SAMPLES

- [Using the Samples Page](#)
- [Using the Samples Table Features and Functions](#)
 - [Persistent Columns](#)
 - [Optional Columns / Choosing Columns to Display](#)
 - [Sorting and Filtering via Column Headers](#)
 - [Arranging Columns](#)
 - [Sizing Columns](#)
 - [Navigating and Managing Sample Lists](#)
- [Using Advance Filters](#)
- [Closing Samples](#)
- [Downloading Data](#)
- [Sample Details View Features and Functions](#)
 - [General Information Area](#)
 - [Recommendation Area](#)
 - [History Tab](#)
 - [Activity Log Tab](#)
 - [Attachments Tab](#)
- [Using the Trend Graph](#)

SUBMIT

- [Using the Submit Page](#)
- [Wizard Tab Features and Functions](#)
- [Using the Pending Tab](#)

HELP - DASHBOARD

USING THE DASHBOARD PAGE

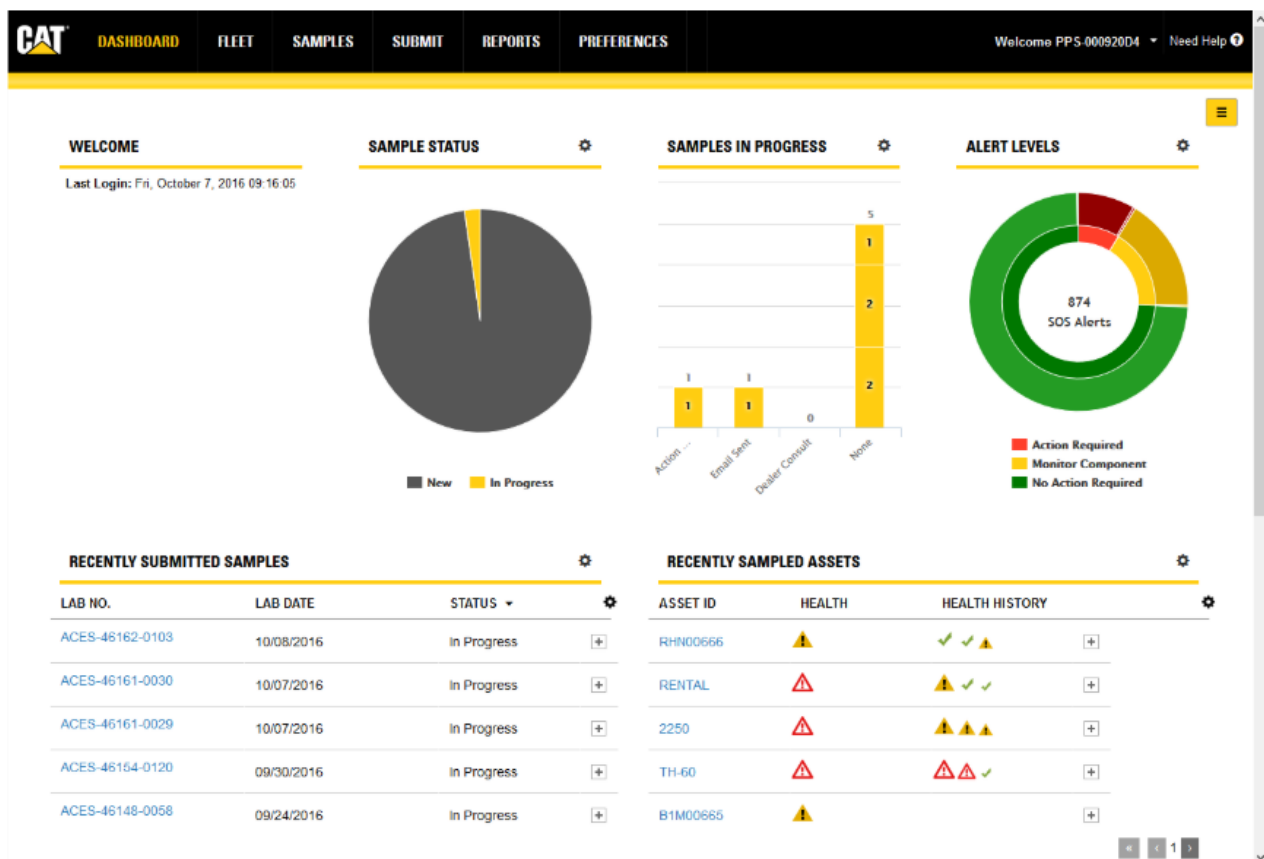
The *Dashboard* page provides you with an overview of various sample elements using widgets that summarize sample information based on default system parameters and parameters you specify.

Many of the widgets in the Dashboard have links that automatically take you to other pages within the application to view sample or asset information. You can use the browser's Back button to return to the *Dashboard* page, or you can click on the **Dashboard** tab in the main toolbar.

The Dashboard can include any combination of the following widgets:

- Alert Levels
- Due Overdue Assets
- Quick Search
- Recently Sampled Assets
- Recently Submitted Samples
- Sample Status
- Samples In Progress
- Welcome

Widgets are presented in a four-column layout as shown in the example below. Most widgets occupy only one column by default, but the **Recently Submitted Samples**, **Recently Sampled Assets**, and the **Due Overdue Assets** widgets occupy two columns due to their widths.



Use the scroll bar on the right to view widgets that might not fit within your browser.

RECENTLY SUBMITTED SAMPLES

LAB NO.	LAB DATE	STATUS	
ACES-46162-0103	10/08/2016	In Progress	+
ACES-46161-0030	10/07/2016	In Progress	+
ACES-46161-0029	10/07/2016	In Progress	+
ACES-46154-0120	09/30/2016	In Progress	+
ACES-46148-0058	09/24/2016	In Progress	+

RECENTLY SAMPLED ASSETS

ASSET ID	HEALTH	HEALTH HISTORY	
RHN00666	⚠	✓ ✓ ⚠	+
RENTAL	⚠	⚠ ✓ ✓	+
2250	⚠	⚠ ⚠ ⚠	+
TH-60	⚠	⚠ ⚠ ✓	+
B1M00665	⚠		+

DUE OVERDUE ASSETS

COMPONENT	ASSET ID	DUE/OVERDUE DATE	
SWING DRIVE	WBK00614	11/06/2016	+
BEVEL GEAR	803235	11/05/2016	+
RADIATOR	KYY00177	11/04/2016	+
HYDRAULIC SYST...	KYY00177	11/04/2016	+
TRANSMISSION	PED00596	11/02/2016	+

QUICK SEARCH

Quick Search

Samples
 Assets

Scrollbar

You can resize the overall layout by stretching or shrinking the width of your browser and adjusting the layout as needed. The widgets will remain in their assigned locations and will resize with the browser adjustment; however, smaller sizing will make it more difficult to view some widget content. The layout width also remains at four columns.

Selecting Widgets to Display

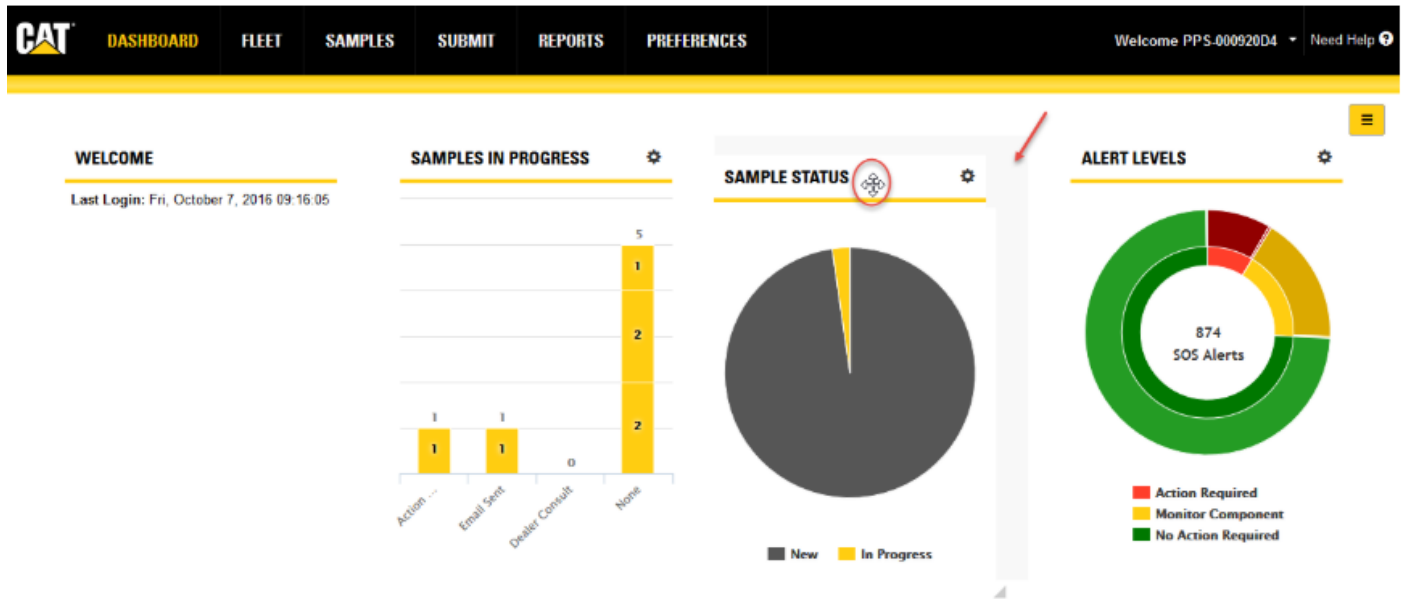
Click on the **Page Settings** icon found in the top right corner of the page to open a dialog box used to select the widgets that you want to appear in your Dashboard. Simply check the boxes next to the widget titles you want to use then click on **OK**.

The screenshot shows the CAT dashboard interface. At the top, there are navigation tabs: DASHBOARD, FLEET, SAMPLES, REPORTS, and PREFERENCES. The user is logged in as PPS-000920D4. A 'DASHBOARD SETTINGS' dialog box is open in the center, listing the following widgets with checked boxes: Quick Search, Welcome, Sample Status, Recently Submitted Samples, Alert Levels, Samples In Progress, Recently Sampled Assets, and Due/Overdue Assets. At the bottom of the dialog are 'OK' and 'CANCEL' buttons. A red arrow points from the 'Page Settings' icon (a gear icon) in the top right corner of the dashboard to the dialog box.

Arranging and Sizing Widgets

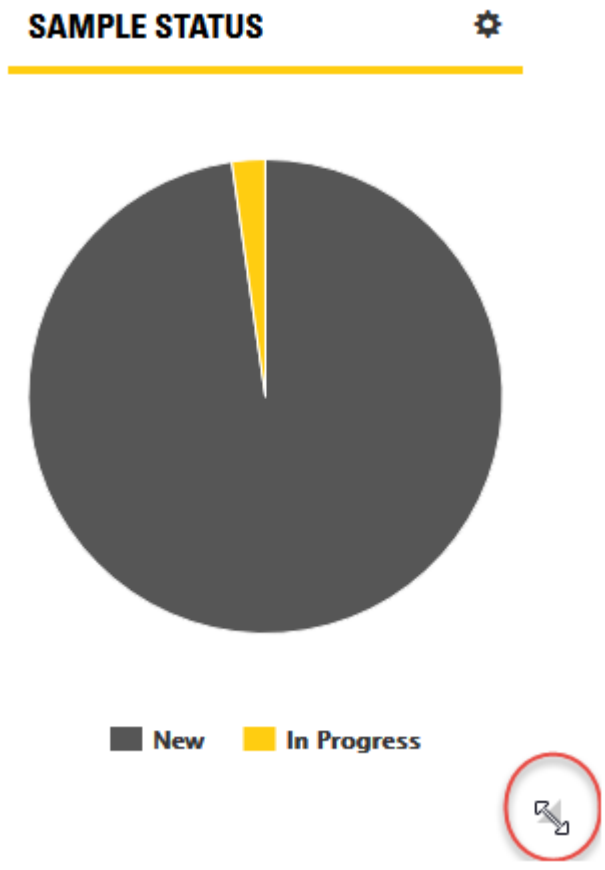
Drag and drop widgets to arrange your Dashboard as you prefer. Click and hold down the left mouse button over the widget's title bar and drag it to the desired location.

You will notice a grey box left behind in the old/current location and another appear when you reach a valid new location.



Placing one widget over another moves the lower widget to an adjacent location when you release the mouse button.

You can resize individual widgets by hovering the mouse cursor over the lower right corner, or any edge of the widget, until you see a two-headed arrow as shown in the example below. Click and hold down the left mouse button to drag the widget to the desired size.



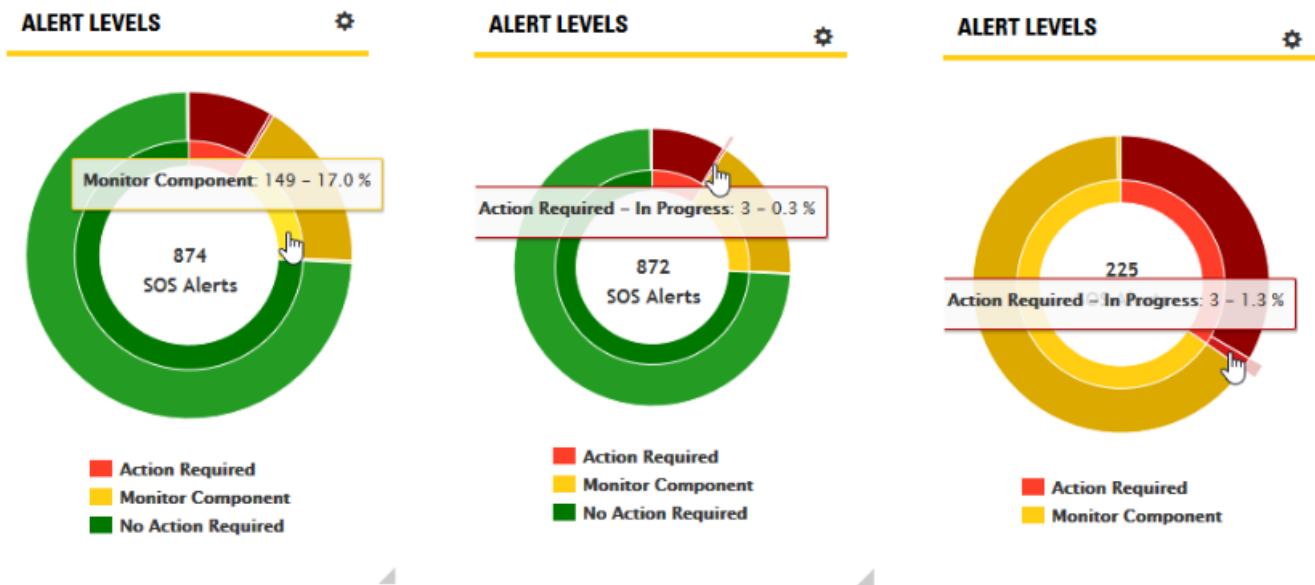
DASHBOARD WIDGET DESCRIPTIONS

Alert Levels Widget

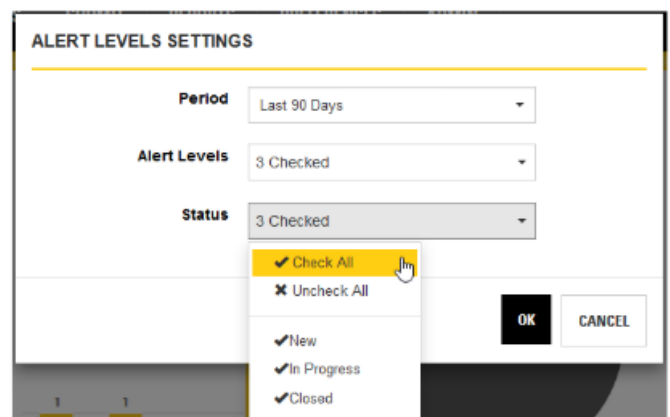
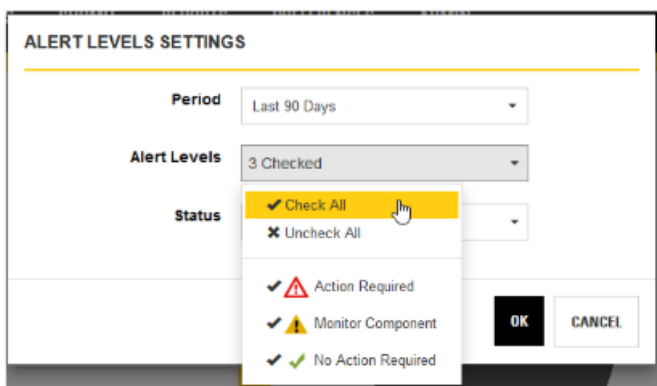
This widget features a two-level doughnut chart. The inner ring shows the number of samples for the selected period currently assigned to selected alert levels. The outer ring provides additional information by dividing samples for a selected alert level by the statuses selected.

Hovering the mouse cursor over a segment within the inner or outer ring opens a tooltip showing the details for that segment.

Clicking on a segment automatically takes you to the *Samples* page so you can view detailed information about the samples within the selected set.



By default, the system displays the last 30 days of available information. Clicking on the **Settings** (gear) icon at the top right of the widget opens a *Settings* dialog box so you can define the Period, Alert Levels, and Status parameters needed. After setting parameters, click on the **OK** button to update the sample information displayed within the widget.



Due Overdue Assets Widget

The **Due Overdue Assets** widget provides an overview of assets that are approaching or have missed their scheduled sampling dates. As the example below illustrates, the value in the **Due/Overdue Date** column is displayed in red when a sample is overdue.

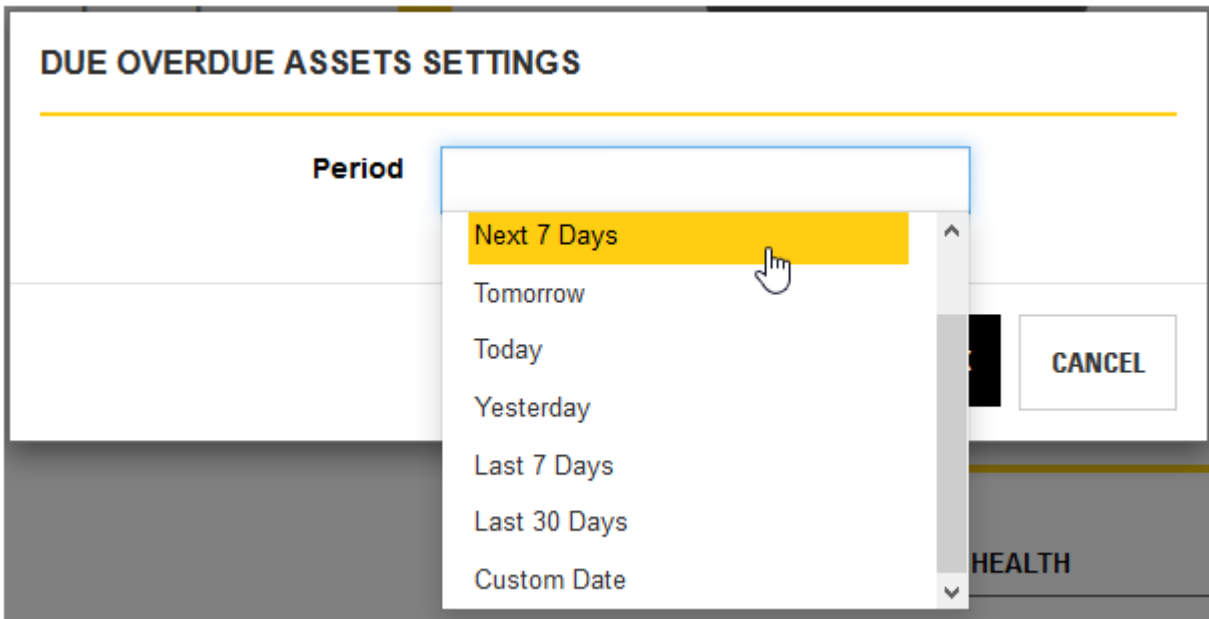
DUE OVERDUE ASSETS



COMPONENT	ASSET ID	DUE/OVERDUE DATE	
CHAIN CASE RIGHT	83010	10/11/2016	+
CHAIN CASE LEFT	83010	10/11/2016	+
DIFFERENTIAL R...	7919	10/10/2016	+
TRANSMISSION P...	7919	10/10/2016	+
HYDRAULIC SYST...	7919	10/10/2016	+

When you click on a link in the **Asset ID** column, the software automatically takes you to the *Fleet* page and opens the *Asset Details* view for the selected asset.

Clicking on the **Settings** (gear) icon at the top right of the widget opens a *Settings* dialog box so you can define the Period. The available options allow you to look ahead for assets coming due for sampling or back in time to look for overdue samples. You can also specify a Custom Date to retrieve information for a specific time period.



Clicking on the **Column Settings** (second gear) icon at the top right of the widget's table opens a drop-down list so you can select the columns you want to appear within the table. If more than three columns are selected, you will see a plus sign (+) appear to the right of the columns indicating that more information is available. Clicking on the plus sign expands the row so you can view the additional information.

DUE OVERDUE ASSETS

COMPONENT	ASSET ID	DUE/OVERDUE DATE	
SWING DRIVE	WBK00614	11/06/2016	+
BEVEL GEAR	803235	11/05/2016	-
Last Sample Date: Jobsite:			
RADIATOR	KYY00177	11/04/2016	+
HYDRAULIC SYST	KYY00177	11/04/2016	+

Columns:

- ✓ Component
- ✓ Asset ID
- ✓ Due/Overdue Date
- ✓ Last Sample Date
- ✓ Jobsite

You can resize the column width by hovering the mouse cursor near the edge of a column header until you see a two-sided arrow as shown in the example below. Click and hold the left mouse button then drag the edge to the new size.

You can also change the order of the top three columns by hovering the mouse cursor over a column heading until you see the finger cursor as shown below. Click and hold the left mouse button then drag the heading to the new location.

DUE OVERDUE ASSETS

COMPONENT	ASSET ID	DUE/OVERDUE DATE	
CHAIN CASE RIGHT	83010	10/11/2016	+
CHAIN CASE LEFT	83010	10/11/2016	+
DIFFERENTIAL REAR	7919	10/10/2016	+
TRANSMISSION POWER S...	7919	10/10/2016	+
HYDRAULIC SYSTEM	7919	10/10/2016	+

Quick Search Widget

The **Quick Search** widget provides you with a tool to quickly locate samples or assets within the system.

In most cases, type ahead (suggest) values will be displayed as a list below the input field to facilitate the selection of a specific sample or asset.

When you click on the **Samples** radio button, the software uses the value entered in the input field to search across a subset of sample fields.

When multiple samples results are found, the software automatically loads the results in the *Samples* page.

When single sample matches are found, the software automatically loads the results in the *Sample Details* view.

QUICK SEARCH

Quick Search

 Assets
ACES-39275-1039
ACES-39275-3013
ACES-39275-4048
ACES-39275-4049
ACES-39275-5019

When you click on the **Assets** radio button, the software will use the value entered in the input field to search across a subset of assets (equipment) and component fields.

When multiple asset results are found, the software automatically loads the results in the *Fleet* page.

When single asset matches are found, the software automatically loads the results in the *Fleet* page *Asset Details* view.

QUICK SEARCH

Quick Search

 Assets
KYY00177
KYY00250
KYY00422
KYY00440
KYY00446

Recently Sampled Assets Widget

This widget displays information in a table view about assets that have been recently sampled.

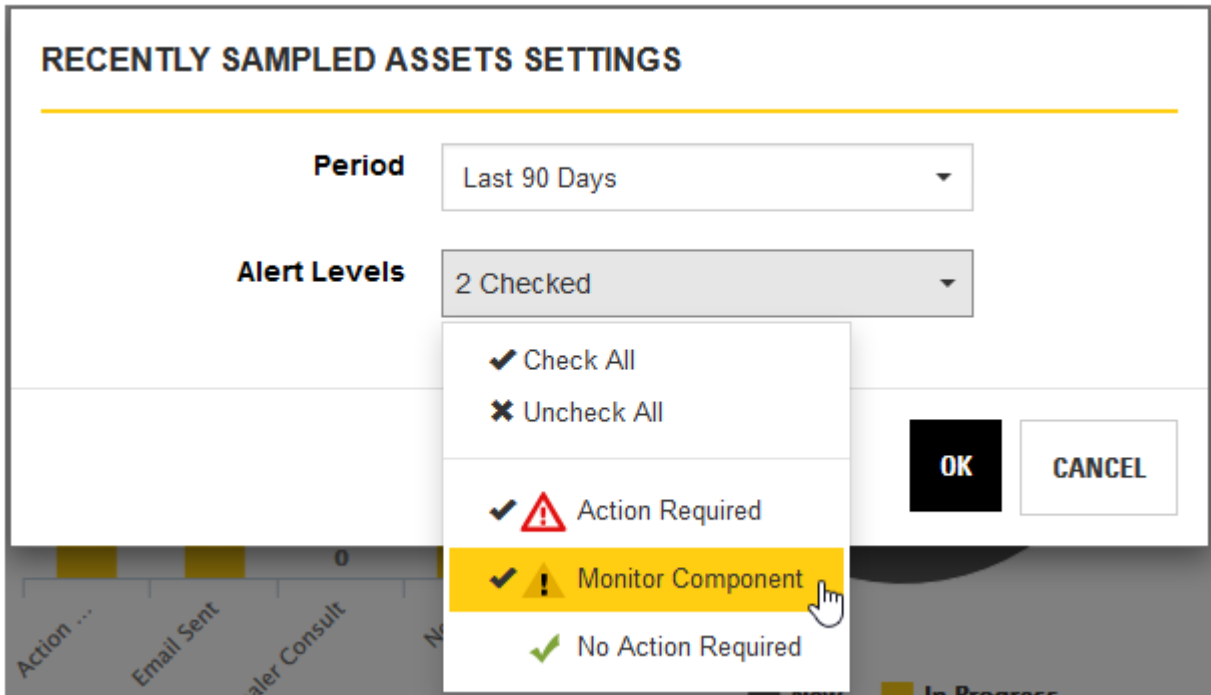
When you click on a link in the **Asset ID** column, the software automatically loads the results in the *Fleet* page *Asset Details* view.

RECENTLY SAMPLED ASSETS



ASSET ID	HEALTH	HEALTH HISTORY	
RHN00666			
RENTAL			
2250			
TH-60			
B1M00665			

Clicking on the **Settings** (gear) icon at the top right of the widget opens a *Settings* dialog box so you can define the Period and Alert Levels to filter the samples listed in the table.



Clicking on the **Column Settings** (second gear) icon at the top right of the widget's table opens a drop-down list so you can select the columns you want to appear within the table. If more than three columns are selected, you will see a plus sign (+) appear to the right of the columns indicating that more information is available. Clicking on the plus sign expands the row so you can view the additional information.

RECENTLY SAMPLED ASSETS

ASSET ID	HEALTH	HEALTH HISTORY	
RHN00666			
RENTAL			
Component: Lab Date: 09/30/2016 Lab No.: ACES-46154-0120 Status: In Progress Asset Serial: 2250			
2250			
TH-60			

Columns:

- Asset ID
- Health History
- Component
- Lab Date
- Status
- Asset Serial Number
- Jobsite

You can resize the column width by hovering the mouse cursor near the edge of a column header until you see a two-sided arrow as shown in the example below. Click and hold the left mouse button then drag the edge to the new size.

You can also change the order of the top three columns by hovering the mouse cursor over a column heading until you see the finger cursor as shown below. Click and hold the left mouse button then drag the heading to the new location.

RECENTLY SAMPLED ASSETS



ASSET ID	HEALTH	HEALTH HISTORY	
RHN00666			
RENTAL			
2250			
TH-60			

Recently Submitted Samples Widget

This widget displays samples that were recently submitted in the system using a table view.

When you click on a link in the **Lab No** column, the software automatically loads the results in the *Samples* page *Sample Details* view.

RECENTLY SUBMITTED SAMPLES



LAB NO.	LAB DATE	STATUS	
ACES-46162-0103	10/08/2016	In Progress	
ACES-46161-0030	10/07/2016	In Progress	
ACES-46161-0029	10/07/2016	In Progress	
ACES-46154-0120	09/30/2016	In Progress	
ACES-46148-0058	09/24/2016	In Progress	

Hovering the mouse cursor over a link in the **Lab No** column opens a tooltip like the one shown in the example so you can quickly view related sample and fluid information, and recommendations (if available).

RECENTLY SUBMITTED SAMPLES



LAB NO.	SAMPLE INFORMATION
ACES-46162-0103	Status: In Progress Activity: Email Sent
ACES-46161-0030	FLUID INFORMATION
ACES-46161-0029	Meter: 1463 Fluid Brand: CATDEOULS Meter On Fluid: 158 Fluid Type: OIL Fluid Change: No Fluid Weight: 10W-30 Filter Change: No Makeup Fluid:
ACES-46154-0120	RECOMMENDATION ALUMINUM AND IRON ARE HIGH. POSSIBLE CRANKSHAFT/CAMSHAFT OR BEARING WEAR. STOP UNIT IMMEDIATELY TO CORRECT PROBLEMS. AFTER INSPECTION, CHANGE OIL AND FILTERS. RESAMPLE IN 100 HOURS TO MONITOR. E-MAILED RESULTS TO CUSTOMER.
ACES-46148-0058	

Clicking on the **Settings** (gear) icon at the top right of the widget opens a *Settings* dialog box so you can define the Period for the samples submitted to filter the samples listed in the table.

RECENTLY SUBMITTED SAMPLES SETTINGS

Period

OK **CANCEL**

Clicking on the **Column Settings** (second gear) icon at the top right of the widget's table opens a drop-down list so you can select the columns you want to appear within the table. If more than three columns are selected, you will see a plus sign (+) appear to the right of the columns indicating that more information is available. Clicking on the plus sign expands the row so you can view the additional information.

RECENTLY SUBMITTED SAMPLES



LAB NO.	LAB DATE	STATUS ▾	
ACES-46162-0103	10/08/2016	In Progress	+
ACES-46161-0030	10/07/2016	In Progress	-
Asset ID: 2313 Jobsite: Component Serial No.: 4308442			
ACES-46161-0029	10/07/2016	In Progress	+
ACES-46154-0120	09/30/2016	In Progress	+
ACES-46148-0058	09/24/2016	In Progress	+

Columns:

- ✓ Lab Date
- ✓ Status
- ✓ Asset ID
- ✓ Jobsite
- ✓ Component Serial No.

You can resize the column width by hovering the mouse cursor near the edge of a column header until you see a two-sided arrow as shown in the example below. Click and hold the left mouse button then drag the edge to the new size.

You can also change the order of the top three columns by hovering the mouse cursor over a column heading until you see the finger cursor as shown below. Click and hold the left mouse button then drag the heading to the new location.

RECENTLY SUBMITTED SAMPLES



LAB NO.	← → LAB DATE	STATUS ▾	
ACES-46162-0103	10/08/2016	In Progress	+
ACES-46161-0030	10/07/2016	In Progress	+
ACES-46161-0029	10/07/2016	In Progress	+
ACES-46154-0120	09/30/2016	In Progress	+
ACES-46148-0058	09/24/2016	In Progress	+

Samples in Progress Widget

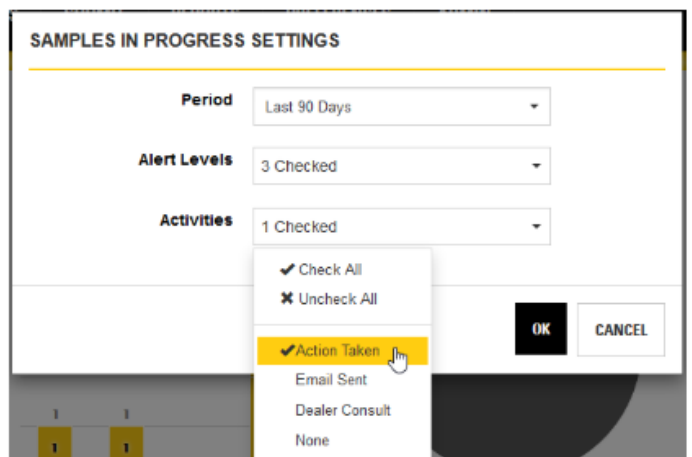
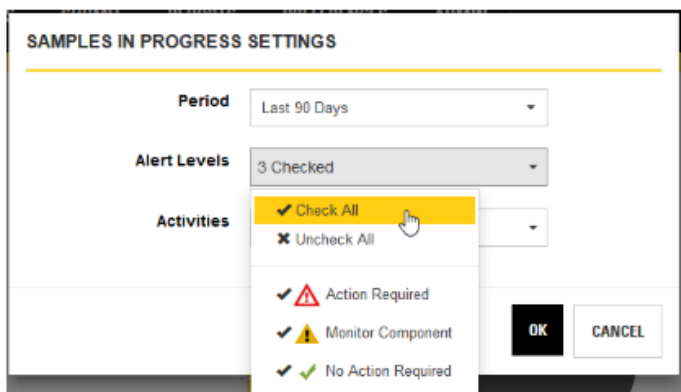
The **Samples in Progress** widget provides you with an overview of samples that are in progress within the sampling process.

Columns are organized by activities, which are shown on the X-axis. Hovering the mouse cursor over an entry in a column opens a tooltip to reveal the number of samples assigned to a specific alert level within the activity.

When you click on an entry within a column, the software automatically switches to the *Samples* page, so you can view more detailed information about the samples assigned to the activity.



By default, the system displays the last 30 days of available information. Clicking on the **Settings** (gear) icon at the top right of the widget opens a *Settings* dialog box so you can define the Period, Alert Levels, and Activities parameters needed. After setting parameters, click on the **OK** button to update the sample information displayed within the widget.



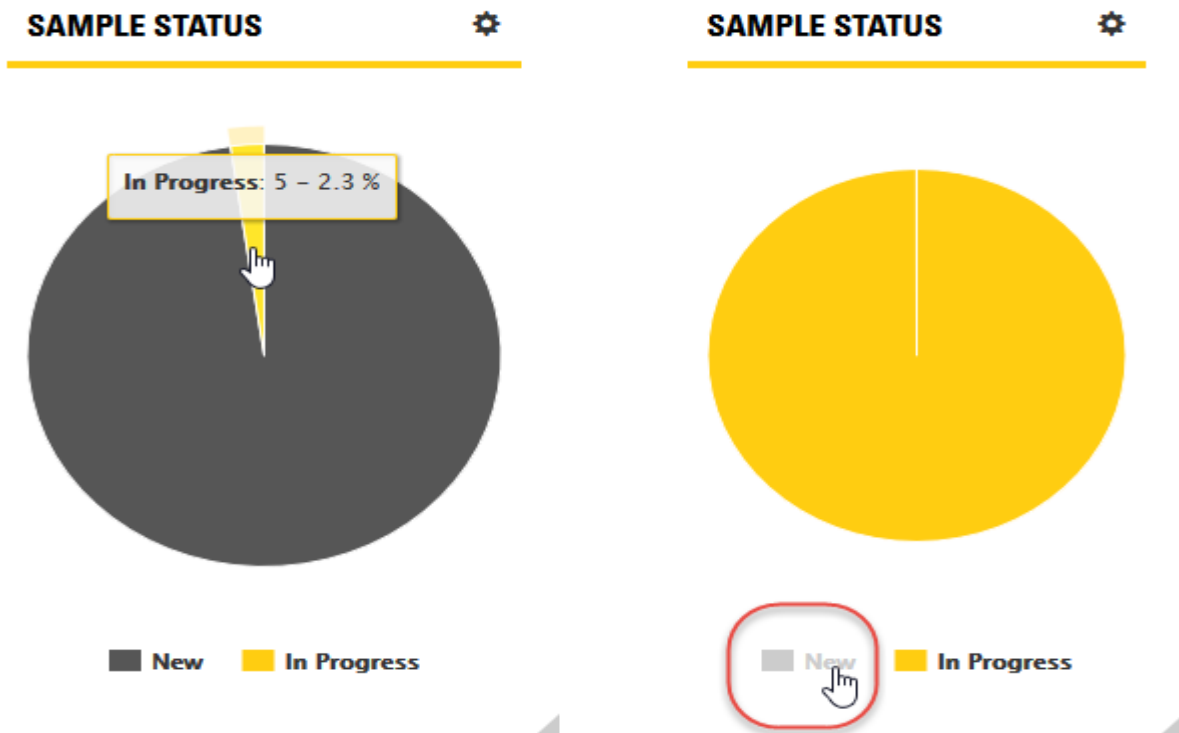
Sample Status Widget

Use the **Sample Status** widget to quickly check the number (or percentage) of samples in the system that have been assigned to specific statuses over a specified time range.

Hovering the mouse cursor over a slice in the pie chart opens a tooltip showing the number and percentage of samples assigned to the specific status.

When you click on a slice in the pie chart, the software automatically switches to the *Samples* page so you can view more detailed information about the samples assigned to the related status.

Clicking on an item in the legend below the pie chart toggles the display of that status within the chart.



Clicking on the **Settings** (gear) icon in the top right corner opens a dialog box used to define the period for the samples.

The screenshot shows a dialog box titled 'SAMPLE STATUS SETTINGS'. It has a 'Period' dropdown menu set to 'Last 60 Days'. At the bottom right, there are 'OK' and 'CANCEL' buttons. A hand cursor is pointing at the 'OK' button.

Welcome Widget

The **Welcome** widget provides you with general information about the application along with information about the last time you logged into the system. The widget can also include message from the system administrator.

WELCOME

Last Login: Fri, October 7, 2016 09:16:05

HELP - FLEET

USING THE FLEET PAGE

The *Fleet* page provides you with the tools needed to display, find, and manage your equipment. The page views and elements include:

- Assets tab
- Components tab
- Asset Details view
- Add/Modify Asset view
- Add/Modify Component dialog

In the **Assets** and **Components** tabs, the top of the *Fleet* page includes a filters section used to refine search capabilities. The Advanced Filter tools allow you to apply ad hoc or previously saved filters when searching for asset data.

The *Asset Details* view provides you with the tools needed to manage asset data.

The screenshot displays the CAT Fleet management interface. At the top, a navigation bar includes 'CAT', 'DASHBOARD', 'FLEET' (highlighted), 'SAMPLES', 'SUBMIT', 'REPORTS', and 'PREFERENCES'. A user greeting 'Welcome PPS-000920D4' and a 'Need Help' link are on the right. Below the navigation bar, there are two tabs: 'Assets' (selected) and 'Components'. A red box highlights these tabs. Below the tabs, there are three buttons: 'ADD', 'MODIFY', and 'DELETE'. To the right of these buttons is a filter dropdown menu with the text '-- Select filter --' and a 'Filter Details' link. A red box highlights the filter dropdown. Below the filter, there is a table with columns: 'ASSET ID', 'ASSET SERIAL NUMBER', 'MANUFACTURER', 'MODEL', 'JOBSITE', and 'REGION'. Each column has a search icon. The table contains 10 rows of equipment data. At the bottom of the table, there is a pagination bar showing 'Showing 1 - 10 of 973 items', a 'Show: 10' dropdown, and navigation arrows. The footer of the page reads 'Caterpillar © 2016. All Rights Reserved.'

ASSET ID	ASSET SERIAL NUMBER	MANUFACTURER	MODEL	JOBSITE	REGION
08-1243	ATS00334	CATERPILLAR	16H	MINESITE 3	
D-40	53Y01584	CATERPILLAR	D8L		
TH-10	9RL00726	CATERPILLAR	322L		
D-4	8PB03330	CATERPILLAR	D4H		
T-5	101030_DALMOLIN	PETERBILT	359_PETERBILT		
L-30	22Z02027	CATERPILLAR	950B		
TH-70	9KR00263	CATERPILLAR			
S-20	2DB00489	CATERPILLAR	621		
S-10	2DB00330	CATERPILLAR	621		
SL-10	16446	GEHL	SL4625_GEHL		

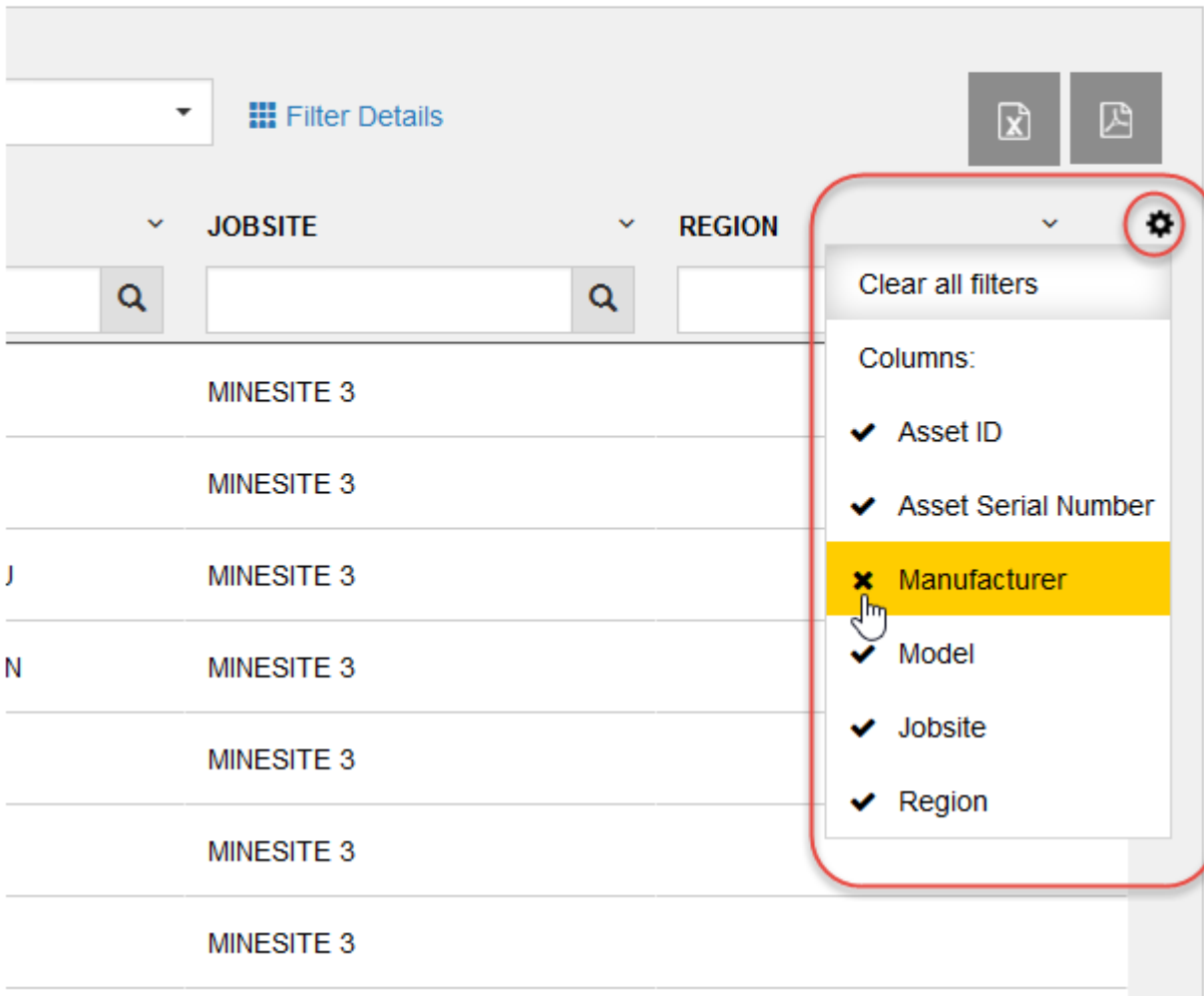
FLEET PAGE COMMON FEATURES AND FUNCTIONS

The **Assets** and **Components** tabs share common functions such as column selecting, arrangement, and sorting. Descriptions of common functions are described in this section.

Choosing Columns to Display

Click on the **Settings** (gear) icon found to the right of the column headers to open a drop-down list as shown below. A check mark appearing to the left of a column title signifies that the column will appear within the table; an X mark hides the related column.

Click anywhere outside the drop-down list to close it.



NOTE: The columns that are available for viewing will depend on the user type logged into the system.

The columns that actually appear within the table view depend on the screen real estate available. If more columns are selected than space allows, a plus sign (+) icon appears to the right of the rows signifying that additional information is available.

Clicking on the plus sign (+) icon within a specific row expands the row as shown in the example so you can view the additional information as needed. Scroll bars are used to help you view content that is longer or wider than what can be shown within the display area.

The changes made to column settings will persist as your preference, so when you log out then return to the system, you will see the columns and the order appear based on the last defined settings.

Assets Components

SUBMIT COMPARE GRAPH -- Select filter -- Filter Details

ASSET ID	COMPONENT	COMPONENT SERIAL NUMBER	COMPONENT MANUFACTURER	MODEL	LAST SAMPLE DATE
L-60	TRANSMISSION PO...				04/29/2016
L-60	HYDRAULIC SYSTEM				04/29/2016
Due / Overdue: 11/26/2016 Asset Serial Number: ANZ01125 Jobsite: Region:					
L-60	DIFFERENTIAL REAR				04/29/2016

Sorting and Filtering via Column Headers

Headers identify the information displayed in columns, but you can also use them to sort and filter the table's data.

To sort data in ascending or descending order, click on the small arrow to the right of a column header then select the desired order. Columns can also be hidden by clicking on the **x Hide Column** item in the header's menu.

Some column headers provide drop-down lists used to select information options; others use direct entry fields in which you can enter specific search elements to more quickly locate a particular sample.

Assets Components

SUBMIT COMPARE GRAPH -- Select filter -- Filter Details

ASSET ID	COMPONENT	COMPONENT SERIAL NUMBER	COMPONENT MANUFACTURER	LAST SAMPLE DATE	MODEL
L-60				--Select Option--	
5010				--Select Date--	
PED00596				Today	
5010	TRANSFER GEARS			Yesterday	
TH-80	SWING DRIVE			Last 7 Days	
TH-25	SWING DRIVE			Last 30 Days	

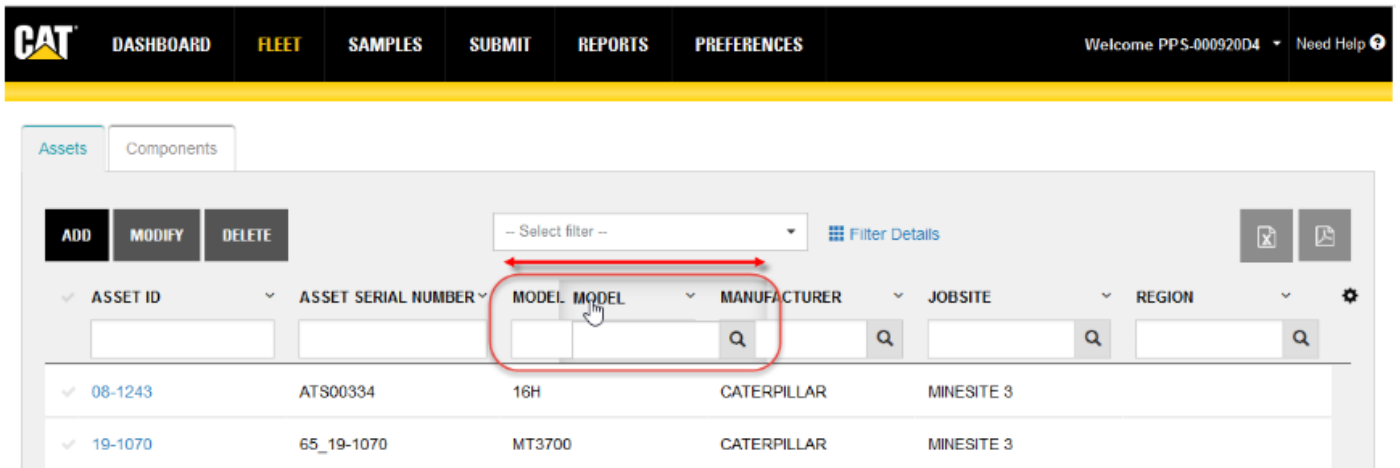
To clear header filters, click on the **Settings** gear icon located top right of the table then click on **Clear all filters**.

NOTE: Clicking on **Clear all filters** from **Settings** does not clear filters applied via the Advanced Filters feature. An active advanced filter must be cleared by clicking on **Reset** found in that section.

Arranging Columns

You can rearrange the order of the columns simply by dragging them to the location you want.

Move your mouse cursor over the column title, then click and hold the left mouse button down. As the image below shows, the selected column "detaches" from its original location to confirm which column you are moving.



The screenshot shows the CAT interface with a table of assets. The columns are: ASSET ID, ASSET SERIAL NUMBER, MODEL, MANUFACTURER, JOBSITE, and REGION. The 'MODEL' column is highlighted with a red circle, and a red double-headed arrow indicates it is being moved to the position between 'ASSET SERIAL NUMBER' and 'MANUFACTURER'.

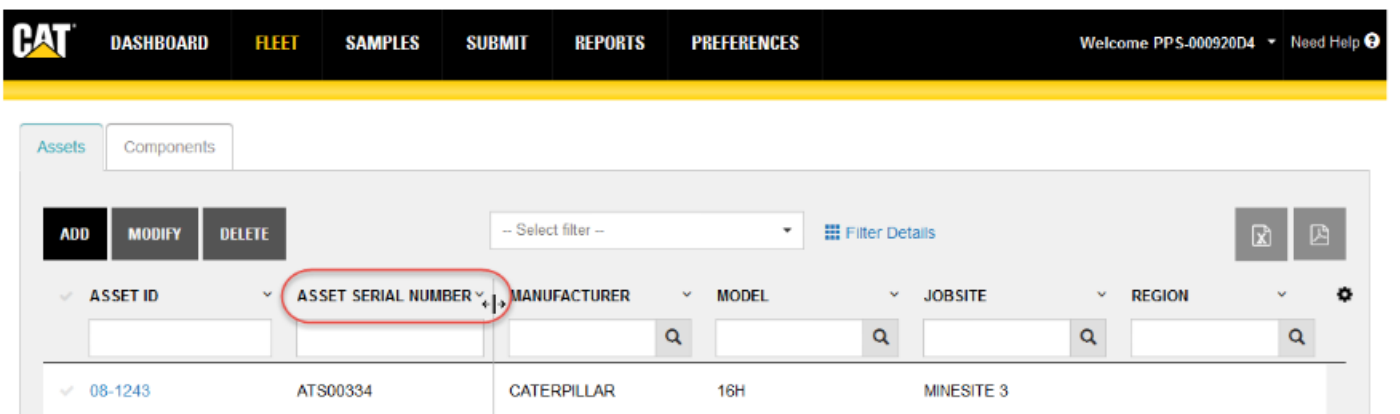
ASSET ID	ASSET SERIAL NUMBER	MODEL	MANUFACTURER	JOBSITE	REGION
08-1243	ATS00334	16H	CATERPILLAR	MINESITE 3	
19-1070	65_19-1070	MT3700	CATERPILLAR	MINESITE 3	

Drag the column to the desired location then release the mouse button. In a moment, the application will reorganize the table with the column in the new location. When you log out, the system saves the latest configuration so that the table will appear the same in your future sessions.

NOTE: The check mark column is always displayed in the far left column of the table and cannot be moved or removed.

Sizing Columns

You can adjust the width of columns by hovering the mouse cursor between column edges until you see a double-line arrow as shown in the example. Then hold down the left mouse button, drag the column to the desired width then release the mouse button.



The screenshot shows the CAT interface with a table of assets. The columns are: ASSET ID, ASSET SERIAL NUMBER, MANUFACTURER, MODEL, JOBSITE, and REGION. The 'ASSET SERIAL NUMBER' column is highlighted with a red circle, and a red double-headed arrow indicates it is being resized.

ASSET ID	ASSET SERIAL NUMBER	MANUFACTURER	MODEL	JOBSITE	REGION
08-1243	ATS00334	CATERPILLAR	16H	MINESITE 3	

Navigating and Managing Samples Lists

Paging controls appear at the bottom of the table (left and right) to facilitate navigation through longer lists of data.

A **Showing** segment label identifies the range of results displayed.

A **Show** section filter identifies the number of results shown within the table. As the options suggest, you can show 10, 25, 50, or 100 samples per page.

Controls to the right allow you to select from multiple pages for longer sample sets.

✓ 852522	1FV6HFAA5TL860318	FL70_FREIGHTLIN	FREIGHTLINER	DEALER NAME
✓ 19-1071	66_ACES	MT3700	CATERPILLAR	MINESITE 3 DEALER NAME

Showing 1 - 10 of 973 items

Show: 10

- 10
- 25
- 50
- 75

1 / 98

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USING ADVANCED FILTERS

Many column headers in the main **Assets** and **Components** tab tables provide direct filtering capabilities to help you locate specific equipment within the database. In addition, the Advanced Filters feature helps you further narrow down data by giving you the tools to specify multiple conditions (properties) for a given filter, so you can customize the information displayed based on the filter selected.

If you end your session with a filter selected, when you log back in, the system will retain the last filter used and the data presented will be filtered accordingly. In addition, filters set via the column headers will also persist between sessions.

Assets Components

-- Select filter -- Filter Details

Asset UCID equals THOMPSON CORPORATION

+ Add Filter Condition Save Filter Apply Reset

ASSET ID	ASSET SERIAL NUMBER	MANUFACTURER	MODEL	JOBSITE	REGION
✓ 08-1243	ATS00334	CATERPILLAR	16H	MINESITE 3	
✓ D-40	53Y01584	CATERPILLAR	D8L		
✓ TH-10	9RL00726	CATERPILLAR	322L		




You can use existing filters by clicking on the arrow to the right of the **Select filter** drop-down list then clicking on the desired filter shown in the list.

Create new filters by clicking on **Filter Details** then **Add Filter Condition**.

Specify filter criteria by using lists to choose the property, operator, and in many cases predefined values based on the filter types.

In other cases, you will need to know the value to enter directly, or you may be presented with a *Lookup Value* dialog box to help you quickly retrieve condition values from information stored in the database.

UCID LOOKUP

NAME	DESCRIPTION	
<input type="text"/>	<input type="text"/>	
✓ 4264121271	THOMPSON CORPORATION	
✓ 4264121272	RENO LIMITED, LLC	
✓ 4264121273	CHRISTOPHER MANUFACTURING	

OK **CANCEL**

To further refine search parameters, click again on **Add Filter Condition** and specify the additional parameters needed.

After creating a new filter, you can click on **Apply** to have the system refine the samples list presented. Note that applying the filter does not save the filter for future use.

Be sure to click on **Save Filter** to add the new filter to your list.

Clicking on **Reset** clears all advanced filter fields, deselects the active advanced filter, and updates the samples display accordingly.

NOTE: Clicking on **Reset** does not affect filters selected via the column headers. To clear those filters, click on the **Settings** gear icon located top right of the table then click on **Clear all filters**.

ASSETS TAB FEATURES AND FUNCTIONS

The **Assets** tab provides you with the tools to browse and manage all of the assets in your fleet including adding, modifying, and deleting assets.

ASSET ID	ASSET SERIAL NUMBER	MANUFACTURER	MODEL	JOBSITE	REGION
08-1243	ATS00334	CATERPILLAR	16H	MINESITE 3	
D-40	53Y01584	CATERPILLAR	D8L		
TH-10	9RL00726	CATERPILLAR	322L		
D-4	8PB03330	CATERPILLAR	D4H		
T-5	101030_DALMOLIN	PETERBILT	359_PETERBILT		

Adding an Asset

Adding an asset is simply a matter of clicking on the **Add** button and filling out the form provided in the *Add Asset* view.

The **Add Asset** form collects asset and ownership information. Providing information for the required fields will create the new asset as needed, but including information in other fields can prove useful when completing other tasks within the application.

Some fields are direct entry; you must know the value that needs to be entered. Other fields have suggest capability; entering partial information will cause the software to provide filtered lists that contain the partial value entered.

Additionally, many fields include lookup features to help you locate the needed values that are currently stored in the database.

When you first enter the **Add Asset** form, the **Manufacturer** and **Dealer** fields will be grayed out. To activate the **Manufacturer** field, enter a valid serial number in the **Asset Serial Number** field then press Enter on your keyboard.

The software will not only enable the **Manufacturer** field, it will automatically update the lookup list for the **Model** field.

Selecting a model from the **Model** lookup will in turn activate the **Dealer** field. The software will then have the information it needs to automatically populate the **COMPONENTS** table when the new asset is saved.

When you have satisfactorily completed at least the required fields, click on **SAVE ASSET** to save the new asset to the database.

CAT DASHBOARD **FLEET** SAMPLES SUBMIT REPORTS PREFERENCES Welcome PPS.000920D4

ADD ASSET

Asset ID	<input type="text" value="BH-12"/>	* Asset Serial Number	<input type="text" value="W3K00902"/>
* Manufacturer	<input type="text" value="CATERPILLAR"/> Q	* Model	<input type="text" value="426B4_CAT"/> Q
* Dealer	<input type="text" value="DEALER NAME"/> Q	* DCN Customer	<input type="text" value="RENO EXCAVATION"/> Q
Jobsite	<input type="text" value="MINESITE 2"/> Q	Region	<input type="text" value="Region 1"/> Q
Meter Type	<input type="text" value="Time"/> Q	Meter Units	<input type="text" value="HOUR"/> Q
Language	<input type="text" value="English"/> Q	Asset Note	<input type="text" value="New Equipment Purchase"/>

Required Fields *

After saving the new asset, the **COMPONENTS** table appears in the bottom section of the view.

You can use this table to add, edit, or delete components assigned to the asset.

CAT DASHBOARD **FLEET** SAMPLES SUBMIT REPORTS PREFERENCES Welcome PPS.000920D4 Need Help

ADD ASSET

Asset ID	<input type="text" value="BH-12"/>	* Asset Serial Number	<input type="text" value="W3K00902"/>
* Manufacturer	<input type="text" value="CATERPILLAR"/> Q	* Model	<input type="text" value="426B4_CAT"/> Q
* Dealer	<input type="text" value="DEALER NAME"/> Q	* DCN Customer	<input type="text" value="RENO EXCAVATION"/> Q
Jobsite	<input type="text" value="MINESITE 2"/> Q	Region	<input type="text" value="Region 1"/> Q
Meter Type	<input type="text" value="Time"/> Q	Meter Units	<input type="text" value="HOUR"/> Q
Language	<input type="text" value="English"/> Q	Asset Note	<input type="text" value="New Equipment Purchase"/>

COMPONENTS

ADD	MODIFY	DELETE	COMPONENT	COMPONENT MANUFACTURER	MODEL	COMPONENT SERIAL NUMBER
<input checked="" type="checkbox"/>			ENGINE			
<input checked="" type="checkbox"/>			TRANSMISSION POWER SHIFT			
<input checked="" type="checkbox"/>			HYDRAULIC SYSTEM			

To add a component, click on the **Add** button then enter information as needed in the *ADD COMPONENT* dialog box.

To edit information for a component, click on the **Check Mark** to left of the component you want to edit then click on the **MODIFY** button.

Modify the information in the *EDIT COMPONENT* dialog box as needed then save your changes.

EDIT COMPONENT

* Description: ENGINE Serial Number: W3K00902

* Manufacturer: CATERPILLAR Model: 428E_CAT

Install Date: 08/17/2016 Sampling Interval: 250

Change Interval: 500 Install Interval: []

SAVE CANCEL

COMPNENTS

ADD **MODIFY** DELETE

COMPONENT	COMPONENT MANUFACTURER	MODEL	COMPONENT SERIAL NUMBER
<input checked="" type="checkbox"/> ENGINE			
<input type="checkbox"/> HYDRAULIC SYSTEM			
<input type="checkbox"/> RADIATOR			
<input type="checkbox"/> FUEL SYSTEM			

Modifying an Asset

Modifying information for an existing asset is similar to adding a new asset; click on the **Check Mark** to select the asset you want to modify then click the **MODIFY** button to open the *Modify Asset* view.

Make your changes to the necessary fields within the form, and manage component information as needed then click on **SAVE ASSET** to commit your changes to the database.

MODIFY ASSET

Asset ID: TH-10 * Asset Serial Number: SRL00726

* Manufacturer: CATERPILLAR * Model: 322L

* Dealer: DEALER NAME * DCN Customer: RENO EXCAVATION

Jobsite: [] Region: []

Meter Type: Time Meter Units: HOUR

Language: English Asset Note: []

SAVE ASSET CANCEL

COMPNENTS

ADD MODIFY DELETE

COMPONENT	COMPONENT MANUFACTURER	MODEL	COMPONENT SERIAL NUMBER
<input type="checkbox"/> ENGINE			
<input type="checkbox"/> HYDRAULIC SYSTEM			
<input type="checkbox"/> RADIATOR			
<input type="checkbox"/> FUEL SYSTEM			
<input type="checkbox"/> FINAL DRIVE REAR LEFT			
<input type="checkbox"/> FINAL DRIVE REAR RIGHT			

COMPONENTS TAB FEATURES AND FUNCTIONS

The **Components** tab provides you with the tools to view data for all of the components in your fleet. You can also use this tab to submit new samples and compare sample results data for two or more components.

Clicking on an item in the **Component** column automatically takes you to the *Asset Details* view for the selected component. Refer to the *Asset Details Features and Functions* section for more information.

The screenshot shows the CAT Components tab interface. At the top, there is a navigation bar with 'CAT' logo, 'DASHBOARD', 'FLEET', 'SAMPLES', 'SUBMIT', 'REPORTS', and 'PREFERENCES'. The user is logged in as 'Welcome PPS-000920D4' and has a 'Need Help' link. Below the navigation bar, there are tabs for 'Assets' and 'Components'. The 'Components' tab is active. In the top left of the component view, there are two buttons: 'SUBMIT' and 'COMPARE GRAPH', both highlighted with a red box. Below these buttons is a search filter dropdown set to '-- Select filter --' and a 'Filter Details' link. The main area contains a table with the following columns: 'ASSET ID', 'COMPONENT', 'COMPONENT SERIAL NUMBER', 'COMPONENT MANUFACTURER', 'MODEL', and 'LAST SAMPLE DATE'. The table lists several components for assets L-60, TH-70, TH-25, and TH-80. The 'COMPONENT' column is highlighted with a red box. At the bottom, it shows 'Showing 1 - 10 of 34 items' and a 'Show: 10' dropdown.

ASSET ID	COMPONENT	COMPONENT SERIAL NUMBER	COMPONENT MANUFACTURER	MODEL	LAST SAMPLE DATE
L-60	TRANSMISSION PO...	3HSDJSR5CW115929	CATERPILLAR		04/29/2016
L-60	HYDRAULIC SYSTEM	125HM2Y4137975	CATERPILLAR		04/29/2016
L-60	DIFFERENTIAL REAR	4137973	CATERPILLAR		04/29/2016
L-60	DIFFERENTIAL FR...				04/29/2016
TH-70	ENGINE				01/18/2016
TH-25	FINAL DRIVE REAR ...				03/10/2015
TH-25	FINAL DRIVE REAR ...				03/10/2015
TH-80	SWING DRIVE				03/10/2015
TH-25	SWING DRIVE				03/10/2015
TH-25	HYDRAULIC SYSTEM				03/10/2015

Submitting Component Samples

Click on the **Check Mark** for one or more components for which you will be submitting samples then click on the **SUBMIT** button.

The screenshot shows the CAT Components tab interface, similar to the previous one. The 'SUBMIT' button is highlighted with a red box. A red box also highlights the first four rows of the table, which correspond to the components selected for submission in the previous step. The 'SUBMIT' button is located in the top left of the component view, next to the 'COMPARE GRAPH' button. The table shows the same data as the previous screenshot, but with the first four rows highlighted.

ASSET ID	COMPONENT	COMPONENT SERIAL NUMBER	COMPONENT MANUFACTURER	MODEL	LAST SAMPLE DATE
L-60	TRANSMISSION PO...				04/29/2016
L-60	HYDRAULIC SYSTEM				04/29/2016
L-60	DIFFERENTIAL REAR				04/29/2016
L-60	DIFFERENTIAL FR...				04/29/2016
TH-70	ENGINE				01/18/2016

The application automatically changes to the *Submit* page, which you will use to complete the sample submission process. Refer to the *Submit* page help for details on using the page's features and functions.

Wizard Pending

1 Select Components 2 Sample Details 3 Summary **SAMPLE DETAILS →**

Component Set
 - Choose Set -

Search or Add Component
 Q

REMOVE **SAVE COMPONENT SET**

ASSET ID	COMPONENT	ASSET SERIAL NUMBER	COMPONENT MANUFAC...	JOBSITE	MODEL
✓ L-60	TRANSMISSION POWE...	ANZ01125	CATERPILLAR		
✓ L-60	HYDRAULIC SYSTEM	ANZ01125	CATERPILLAR		
✓ L-60	DIFFERENTIAL REAR	ANZ01125	CATERPILLAR		
✓ L-60	DIFFERENTIAL FRONT	ANZ01125	CATERPILLAR		

Using the Compare Graph Feature

The **Compare Graph** is used to compare existing test results data between two or more selected components. Click on the check marks for the components you want to compare then click on the **COMPARE GRAPH** button.

Assets **Components**

Within a 50 records limit

SUBMIT **COMPARE GRAPH** - Select filter - Filter Details

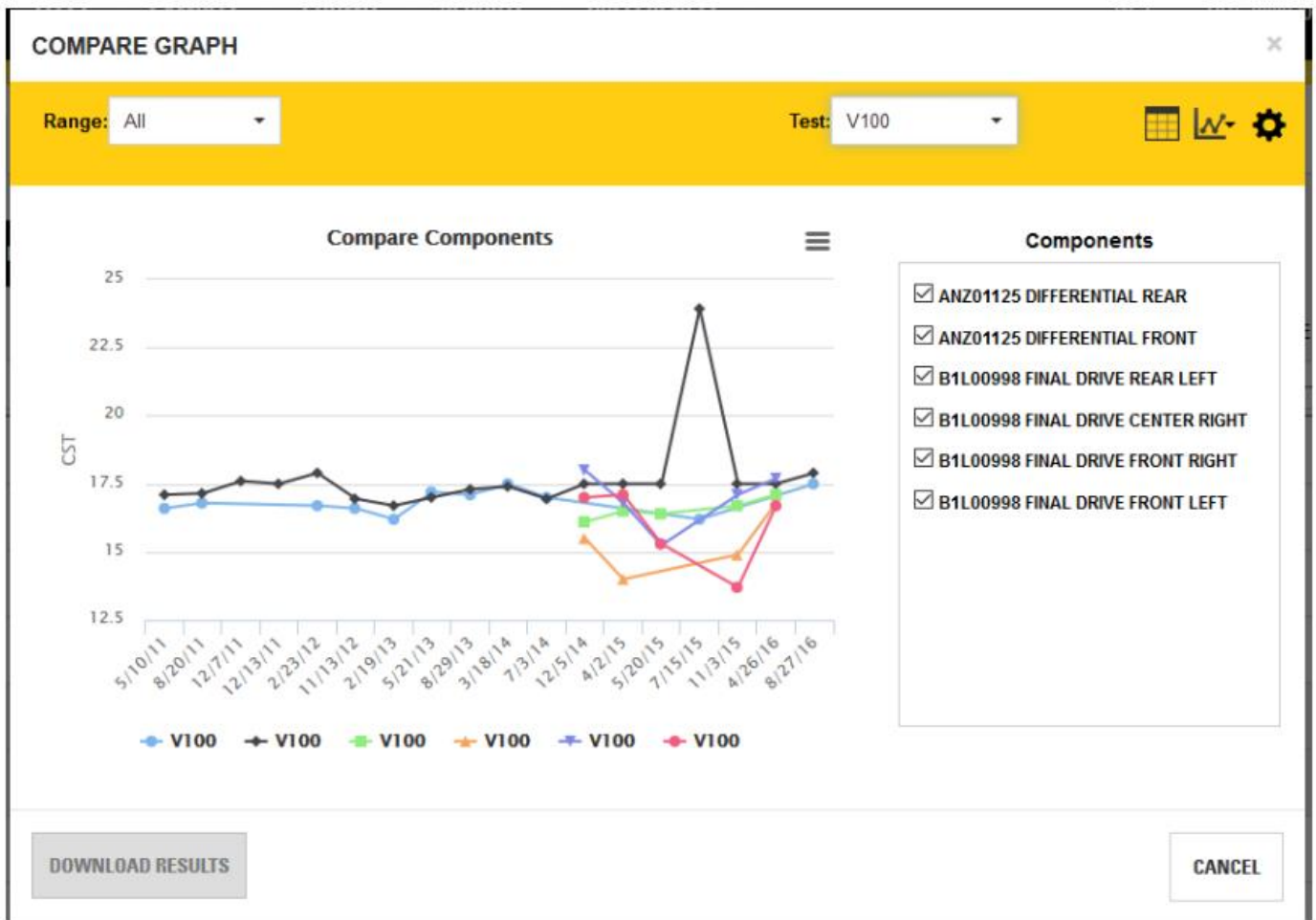
ASSET ID	COMPONENT	COMPONENT SERIAL NUMBER	COMPONENT MANUFACTURER	MODEL	LAST SAMPLE DATE
✓ 5010	TRANSMISSION PO...				12/22/2015
✓ 5010	RADIATOR				12/22/2015
✓ 5010	HYDRAULIC SYSTEM				12/22/2015
✓ 5010	FINAL DRIVE REAR ...				12/22/2015
✓ 5010	FINAL DRIVE REAR ...				12/22/2015
✓ 5010	FINAL DRIVE CENT...				12/22/2015
✓ 5010	DIFFERENTIAL CEN...				12/22/2015
✓ 5010	TRANSFER GEARS				12/22/2015
✓ 5010	FINAL DRIVE FRON...				12/22/2015
✓ 5010	FINAL DRIVE FRON...				12/22/2015

Showing 21 of 34 items Show: 10

The **Compare Graph** appears with the selected components listed and selected in the **Components** list. Use the check boxes to add and remove component data from the graph.

You can select from a wide range of analysis results to compare by using the **Test** drop-down list. Note that only one analysis at a time may be selected.

The default X-axis for this graph is a meter reading and the line chart is the default style displayed.



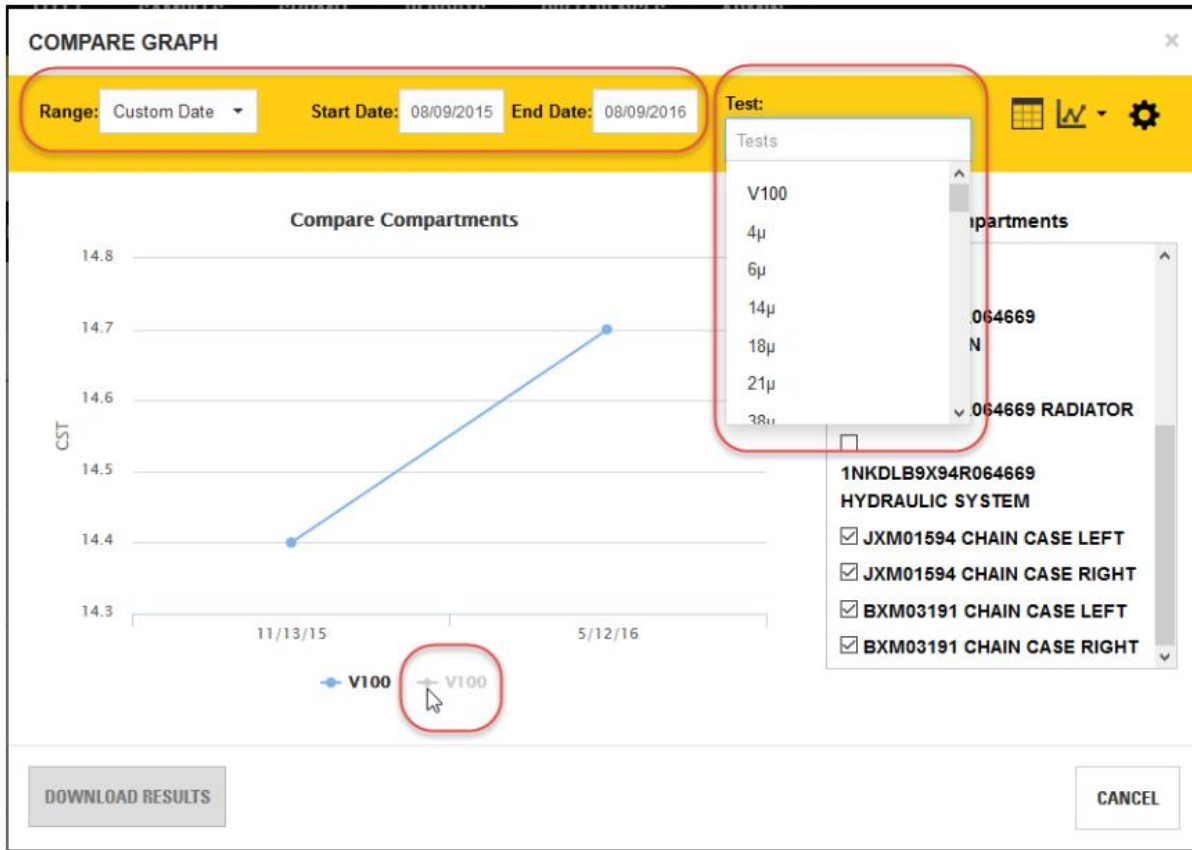
Range drop-down list

This drop-down list helps you select the date range desired for the related sample. You can choose from:

- All samples
- Specific date ranges (Last Month, Last Quarter, Last Semester, or Last Year)
- Custom date range (enables **Start Date** and **End Date** fields)
- Custom sample range (enables **Last Samples** field to select last 5 samples, last 10 samples and so on)

Test Selection drop-down list

Allows for easy selection of test results to be displayed in the graph.

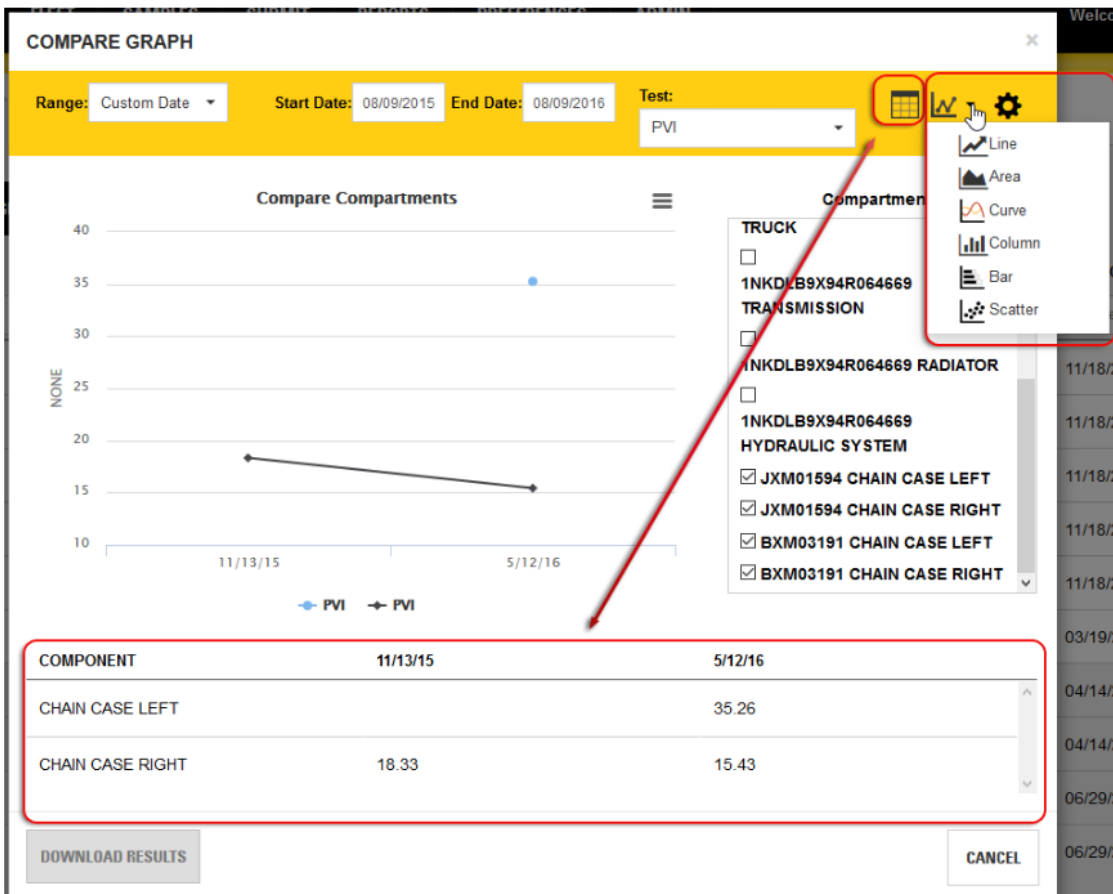


Show/Hide Data Table icon

Can be toggled on and off to display a data table below the graph.

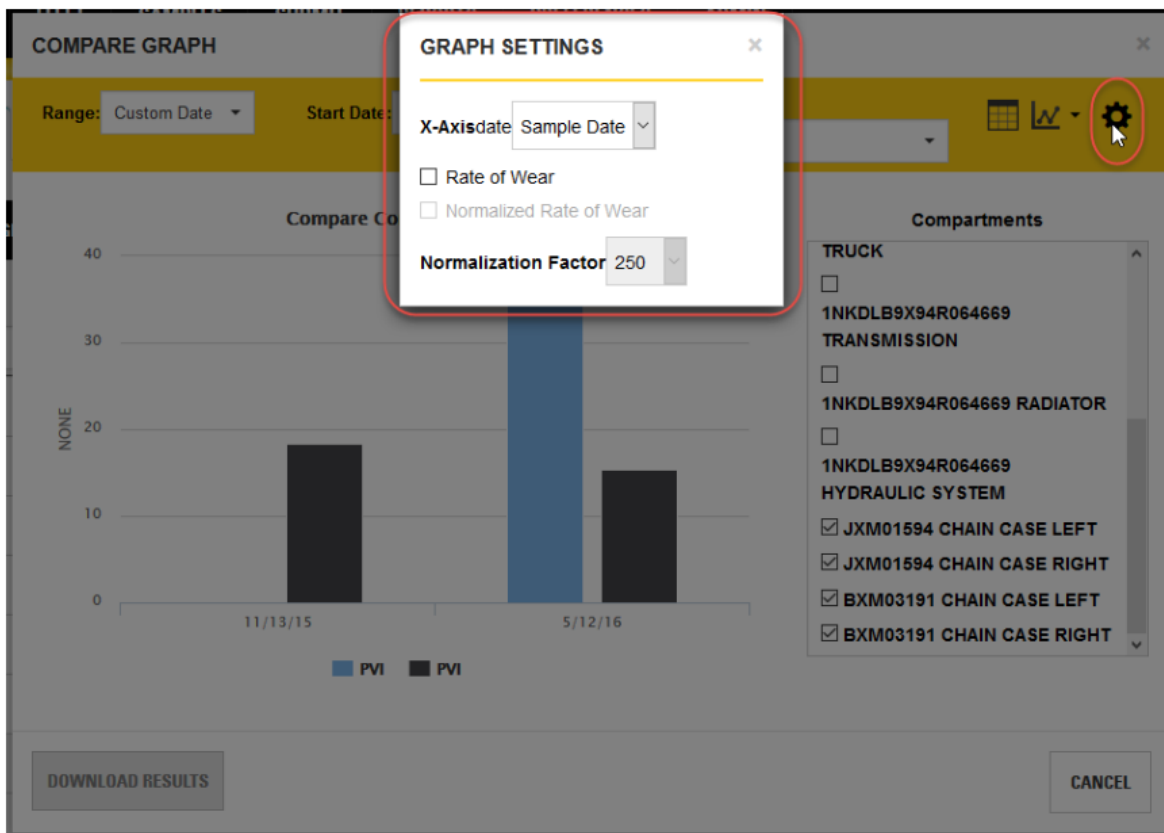
Chart Types drop-down list

Allows you to switch the graph between chart types including line, area, curve, column, bar, and scatter. The default chart type is "line."



Settings (gear icon) popup box

- Toggle X-Axis between meter and sample date.
- Check box to include analysis / test selection by Rate of Wear.
- Check box to include analysis / test selection by Normalized Rate of Wear.
- Normalization Factor input (this will apply to all Normalized Rates on the Graph at one time).



Download Results button

Clicking on this button downloads the selected data in a .CSV formatted file.

Graph Area Features

- Hold left mouse button down and drag to zoom and show more details of any area of the graph.
- Mouse-over a data point will show more details of that sample point.
- Legend below graph shows test abbreviations (data points).
- Clicking on a data point label in the legend toggles the display of the test in the graph.

ASSET DETAILS VIEW FEATURES AND FUNCTIONS

The *Asset Details* view is accessed by clicking on an entry in the **Asset ID** column within the **Assets** tab or by clicking on an entry within the **Component** column in the **Components** tab.

The *Asset Details* view provides you with an overall picture of an asset and allows you to see the sample and maintenance event history for each component.

Other features available in this view include:

- Accessing the *Modify Asset* view to make changes to the asset or its components.
- Starting the sample submission process for the asset's components.
- Adding a fluid maintenance event to the asset's history.

Icons in the top right of the view provide you with access to the Trend Chart for the selected asset, or you can download the asset history.

Hovering the mouse cursor over an item in the **Interp. Text** column opens a tooltip with the complete text for that entry.

The screenshot shows the CAT Fleet Management System interface. At the top, there is a navigation bar with 'DASHBOARD', 'FLEET', 'SAMPLES', 'SUBMIT', 'REPORTS', and 'PREFERENCES'. The user is logged in as 'Welcome PPS-00092004'. Below the navigation bar, there is a header section for asset details: Asset ID: TH-10, Serial No.: 9RL00726, Manufacturer: CATERPILLAR, Model: 322L, and Dealer: DEALER NAME. A 'MODIFY' button is visible in the top right corner. On the left side, there is a 'SUBMIT SAMPLES' button and an 'ADD FLUID MAINTENANCE' button. Below these buttons is a list of components with checkboxes: ENGINE (checked), HYDRAULIC SYSTEM, RADIATOR, FUEL SYSTEM, FINAL DRIVE REAR LEFT (checked), FINAL DRIVE REAR RIGHT (checked), and SWING DRIVE. A 'Component Details' section is also visible. The main area displays a table of results with columns for RESULTS, STATUS, LAB DATE, INTERP. TEXT, and INTERP. DATE. The table contains four rows of data, with the second row highlighted by a red box. The highlighted row shows a 'New' status, a lab date of 08/19/2015, and an interpretation text that reads: 'NORMAL WEAR INDICATED. VALUES HAVE INCREASED. COPPER HAS INCREASED. COPPER IS POSSIBLY THE OIL COOLER LEACHING. IRON HAS INCREASED. ALUMINUM IS ELEVATED. LEAD IS ELEVATED. VALUES INDICATE POSSIBLE HIGH HOURS ON OIL. RECOMMEND RESAMPLE ASAP TO CONFIRM ANALYSIS. MONITOR COMPARTMENT.' The third row shows a warning icon and the text 'VALUES HAVE INCRE...'.

Adding a Fluid Maintenance Event

You can add maintenance events to a selected component for the current asset by checking the component in the components list then clicking on the **ADD FLUID MAINTENANCE** button.

In the *Add Fluid Maintenance* dialog box, use the drop-down list to select the event type(s) to add then enter values in the other fields to describe the details for the event. Values can be entered directly into most fields, or you can use the incrementing or lookup controls provided. You can select multiple event types, such as a Fluid Change and a Filter Change, and the dialog box will add fields as needed to collect the proper information.

NOTE: The fields that appear within the *Add Fluid Maintenance* dialog box will vary depending on the event type and number of event types selected.

The screenshot shows the 'ADD FLUID MAINTENANCE : CIRCLE DRIVE BOX//' dialog box. The dialog box has a title bar with a close button. It contains several fields: 'Select Event' (Fluid Change), '* Sampled Date' (10/27/2016), '* Equipment Meter Reading' (6024), 'Previous Meter Reading' (3000), 'Fluid Brand' (Mobil Spartan EP 150), 'Fluid Weight' (20W-30), 'Fluid Type' (Oil), and 'Notes'. There is an 'ADD' button and a 'CLOSE' button at the bottom right. A red arrow points from the 'CIRCLE' component in the background to the 'Select Event' field. The background shows the asset details for Asset ID: 08-1243 and a list of components with checkboxes. The 'CIRCLE' component is checked.

HELP - SAMPLES

USING THE SAMPLES PAGE

The *Samples* page is the primary interface in the application for:

- Viewing lists of samples
- Creating advanced searching and filtering of samples
- Managing saved searches
- Drilling down to see or modify sample details
- Displaying a sample graph
- Downloading sample data
- Displaying sample reports

When you first enter the *Samples* page, you will see a listing of samples presented in a table view along with column headers and other controls to help you filter, locate, and view information for specific samples.

An **Advanced Filters** section at the top center of the page can be expanded to select existing filters or to create new ones that you can use to refine the samples displayed.

Clicking on the **Lab Number** column entry for a specific sample changes the view to *Sample Details*, where you can examine all information collected on the selected sample.

HEALTH	STATUS	HEALTH HISTORY	LAB NUMBER	COMPONENT	ASSET SERIAL NU.:	LAB DATE	INTERPRETATION ..	
✓	✓	New	✓	ACES-46187-1072	HYDRAULIC SYSTEM	21223_SAMPLES	07/05/2016	NO PROBLEMS PR... +
✓	✓	New	✓	ACES-46188-1005	ENGINE	24520	07/06/2016	NO PROBLEMS PR... +
✓	⚠	New	⚠⚠⚠	ACES-46188-1074	FINAL DRIVE LEFT	26118_SAMPLES	07/06/2016	INSPECT FOR SOU... +
✓	✓	New	⚠✓✓	ACES-46187-1040	ENGINE	AKT00253	07/05/2016	NO PROBLEMS PR... +
✓	✓	New	⚠✓✓	ACES-46188-1080	FINAL DRIVE LEFT	RJG00750	07/06/2016	NO PROBLEMS PR... +
✓	✓	New	⚠	ACES-46188-1076	FINAL DRIVE FRONT L...	2088_SAMPLES	07/06/2016	NO PROBLEMS PR... +
✓	✓	New	✓✓✓	ACES-46187-1044	ENGINE	21312_SAMPLES	07/05/2016	NO PROBLEMS PR... +
✓	✓	New	⚠	ACES-46188-1077	DIFFERENTIAL REAR	2088_SAMPLES	07/06/2016	NO PROBLEMS PR... +
✓	✓	New	✓	ACES-46187-1073	TRANSMISSION POWE...	21223_SAMPLES	07/05/2016	NO PROBLEMS PR... +
✓	⚠	New	⚠⚠	ACES-46187-1043	ENGINE	21223_SAMPLES	07/05/2016	ANTIFREEZE CON... +

USING THE SAMPLES TABLE FEATURES

By default, the **Samples** table will be populated with the last 30 days' worth of samples. The **Lab Date** column will show "Last 30 days" by default. This value can easily be changed as can other filtering elements available via many of the column headers. Any changes made to the filters will adjust the sample records display, and will persist as a preference within the current session.

Columns that appear within the table are presented in a default set and order when you first start the interface. Three of these columns-**Check Mark**, **Health**, and **Lab Number**-are displayed at all times. A number of other columns appear by default, but you can select which columns to display and you can adjust column order as you prefer.

Persistent Columns

- **Check Mark**-this column always appears to the left of the first data column in a table row regardless of other table elements; it cannot be moved. After a row is selected using the check mark, the sample can be included in a download or closed using the **Close Samples** button.
- **Lab Number**-the number assigned to the sample. The column is displayed at all times, but it can be moved to a new position in the table if desired. Clicking on an entry in the **Lab Number** column changes the view to the *Sample Details* page for that particular sample number.
- **Health**-the result status of the sample is represented by icons displayed in the **Health** column. The column is displayed at all times, but it can be moved to a new position in the table if desired. The icons' alert levels are visible in the drop-down list provided just below the column header.

The screenshot shows the CAT software interface with a table of samples. The table has columns for Health, Lab Date, Status, Lab Number, Component, Asset Serial Number, and Dealer Name. A dropdown menu is open for the Health column, showing options like 'Check All', 'Uncheck All', 'Urgent Action Required', 'Action Required', 'Monitor Compartment', 'No Action Required', and 'No Comment'. The 'Action Required' option is highlighted. The table rows show various samples with their respective Lab Numbers and Component names.

HEALTH	LAB DATE	STATUS	LAB NUMBER	COMPONENT	ASSET SERIAL NU.:	DEALER NAME
	07/06/2016	New	ACES-46188-1005	ENGINE	24520	DEALER NAME
	07/06/2016	New	ACES-46188-1074	FINAL DRIVE LEFT	26118_SAMPLES	DEALER NAME
	07/06/2016	New	ACES-46188-1080	FINAL DRIVE LEFT	RJG00750	DEALER NAME
	07/06/2016	New	ACES-46188-1076	FINAL DRIVE FRONT L...	2088_SAMPLES	DEALER NAME
	07/06/2016	New	ACES-46188-1077	DIFFERENTIAL REAR	2088_SAMPLES	DEALER NAME
	07/06/2016	New	ACES-46188-1078	FINAL DRIVE REAR LE...	2088_SAMPLES	DEALER NAME

Clicking on the icons in the **Health** column opens a summary tooltip similar to that shown below to give you a quick view of the current sample without having to leave the page.

The screenshot shows the CAT software interface with a summary tooltip open for a sample. The tooltip is titled 'SAMPLE INFORMATION' and contains details about the sample's status, activity, fluid information, and recommendations. The 'Action Required' icon in the Health column is circled in red, and the tooltip is also circled in red. The tooltip content is as follows:

SAMPLE INFORMATION
 Status: New
 Activity: None

FLUID INFORMATION
 Meter: 54350 Fluid Brand: SHELL
 Meter On: 227 Fluid Type:
 Fluid:
 Fluid Change: - Fluid Weight: 15W-40
 Filter Change: - Makeup Fluid: 0

RECOMMENDATION
 Copper (Cu) is slightly above normal. The high Copper (Cu) could indicate thrust washer/bushing wear, turbo bearing wear, or oil cooler core leaching. Other readings are acceptable. Oil and filter changes were noted. Resample at the recommended interval. Check filter(s) for visible metal and debris. Please report on the next sample if any debris is found in the filter(s), or on the magnetic plug.

PREVIOUS SAMPLES

HEALTH	LAB NUMBER	SAMPLE DATE
	ACES-43046-0036	02/14/2013

Showing 1 of 10 of 11 items Show: 10

Clicking on the **Lab Number** entry within the summary tooltip changes the view to *Sample Details* for the selected sample.

Likewise, clicking on the icons in the **Health History** column opens a summary tooltip with basic information about the historic sample assigned to the icon.

HEALTH
 HEALTH HISTORY
 STATUS
 LAB NUMBER
 ASSET SERIAL NU...

✓	!				
✓	!			New	ACES-40319-0102
✓	✓				00334
✓	✓				00334
✓	✓	✓			00334
✓	!	!			00334
✓	!	!	!		00334
✓	✓	!			00334
✓	!	!			00334
✓	!	!			00334
✓	!	!			00334

SAMPLE INFORMATION

Status: New
Activity: None

FLUID INFORMATION

Meter: 54004 Fluid Brand: SHELL
 Meter On Fluid: 172 Fluid Type:
 Fluid Change: - Fluid Weight: 15W-40
 Filter Change: - Makeup Fluid: 0

RECOMMENDATION

Copper (Cu) is above normal. The high Copper (Cu) could indicate thrust washer/bushing wear; turbo bearing wear; or oil cooler core leaching. Iron (Fe) is slightly above normal for amount of hours on oil. Slight gear, shaft, or liner wear indicated. Other readings are acceptable. Oil and filter changes were noted. Resample in 150 hours. Check filter(s) for visible metal and/or debris. Please report on the next sample if any debris is found in the filter(s); or on the magnetic plug.

Optional Columns / Choosing Columns to Display

Click on the **Settings** (gear) icon found to the right of the column headers to open a drop-down list as shown below. A check mark appearing to the left of a column title signifies that the column will appear within the table; an X mark hides the related column.

Click anywhere outside the drop-down list to close it.

PREFERENCES Welcome PPS-000920D4 | Need Help ?

Filter Details

SERIAL NO.	COMPONENT	LAB DATE	DEALER NAME	
AMPLES	DIFFERENTIAL REAR	10/28/2016	DEALE	<div style="border: 1px solid red; padding: 5px;"> Clear all filters Columns: <input checked="" type="checkbox"/> Health History <input checked="" type="checkbox"/> Status <input checked="" type="checkbox"/> Asset Serial No. <input checked="" type="checkbox"/> Component <input checked="" type="checkbox"/> Lab Date <input checked="" type="checkbox"/> Interp. Text <input checked="" type="checkbox"/> Sampled Date <input checked="" type="checkbox"/> Dealer Name <input checked="" type="checkbox"/> Asset ID <input checked="" type="checkbox"/> Component Serial No. <input checked="" type="checkbox"/> Jobsite <input checked="" type="checkbox"/> Label No. <input checked="" type="checkbox"/> Work Order No. <input checked="" type="checkbox"/> Activity </div>
AMPLES	FINAL DRIVE RIGHT	10/28/2016	DEALE	
AMPLES	FINAL DRIVE LEFT	10/28/2016	DEALE	
97	FINAL DRIVE RIGHT	10/28/2016	DEALE	
97	FINAL DRIVE LEFT	10/28/2016	DEALE	
50	FINAL DRIVE RIGHT	10/28/2016	DEALE	
50	FINAL DRIVE LEFT	10/28/2016	DEALE	
3AFE43_AD	WHEEL BEARINGS FR...	10/26/2016	DEALE	
430087	ENGINE	10/26/2016	DEALE	
	ENGINE	10/26/2016	DEALE	

The columns that appear within the table view depend on the screen real estate available. If more columns are selected than space allows, a plus sign (+) icon appears to the right of the rows signifying that additional information is available.

Clicking on the plus sign (+) icon within a specific row expands the row as shown in the example so you can view the additional information as needed. Scroll bars are used to help you view content that is longer or wider than what can be shown within the display area.

The changes made to column settings will persist as your preference, so when you log out then return to the system, you will see the columns and the order appear based on the last defined settings.

CAT DASHBOARD | FLEET | **SAMPLES** | SUBMIT | REPORTS | PREFERENCES | Welcome PPS-000920D4 | Need Help ?

CLOSE SAMPLES | DOWNLOAD RESULTS | Filter Details

HEALTH	STATUS	HEALTH HISTORY	LAB NUMBER	COMPONENT	ASSET SERIAL NU.:	LAB DATE	
✓	✓	New	ACES-41103-0052	ENGINE	WELLGENSET	04/13/2011	+
✓	⚠	New	ACES-40118-0283	FINAL DRIVE FRONT L...	A92026	04/28/2010	+
✓	✓	New	ACES-41133-0177	BRAKES	B1N00483	05/13/2011	+
✓	⚠	New	ACES-42079-0094	TRANSMISSION POWE...	17Z01104	03/19/2012	+
✓	✓	New	ACES-41160-0425	TRANSMISSION POWE...	8CL01875	06/09/2011	+
<div style="border: 1px solid red; padding: 5px;"> <p>Interpretation Text : COPPER IS HIGH. COPPER ALONE USUALLY INDICATES COOLER CORE LEACHING AND IS NOT NORMALLY WEAR OF BRONZE / BRASS PARTS.</p> <p>Dealer Name : DEALER NAME</p> <p>Asset ID : 8CL01875</p> <p>Component Serial Number :</p> <p>Jobsite :</p> </div>							
✓	⚠	New	ACES-42201-0040	ENGINE	7M659808	07/19/2012	+

Health History

One icon appears in this column for each of the preceding three samples for a component. Different sized icons distinguish the most recent historical sample (largest icon) from the second and oldest samples (oldest sample uses smallest icon). Clicking on an icon opens a summary dialog for that specific sample.

Status-identifies the current status of the sample. There are five possible statuses for a sample:

- **New**
- **In Progress**
- **Closed**
- **In Process**-indicates that the sample is currently being analyzed by the lab.
- **Pending**-indicates that the sample has not been received by the lab.

Sorting and Filtering via Column Headers

Column headers are displayed at the top of each column. The headers identify the information displayed in the columns, and they allow you to sort and filter the table data.

To sort data in ascending or descending order, click on the small arrow to the right of a column header then select the desired order. Some columns can also be hidden by clicking on the **x Hide Column** item in the header's menu.

Some column headers provide drop-down lists used to select information options; others use direct entry fields in which you can enter specific search elements to more quickly locate a particular sample.

The screenshot shows the CAT software interface with the 'HEALTH HISTORY' table. The table has columns for STATUS, LAB NUMBER, ASSET SERIAL NU., COMPONENT, LAB DATE, INTERPRETATION, and DEALER NAME. The STATUS column has a dropdown menu open with options: Check All, Uncheck All, New, In Progress (highlighted), Closed, In Process, Pending, and New. The COMPONENT column has a dropdown menu open with options: Sort Ascending, Sort Descending (highlighted), and Hide Column. The table contains several rows of data, including one for 'TRANSMISSION POWER...' and another for 'HYDRAULIC SYSTEM'.

To clear header filters, click on the **Settings** gear icon located top right of the table then click on **Clear all filters**.

NOTE: Clicking on **Clear all filters** from **Settings** does not clear filters applied via the Advanced Filters feature. An active advanced filter must be cleared by clicking on **Reset** found in that section.

Arranging Columns

You can rearrange the order of the columns simply by dragging them to the location you want.

Move your mouse cursor over the column title, then click and hold the left mouse button down. As the image below shows, the selected column "detaches" from its original location to confirm which column you are moving.

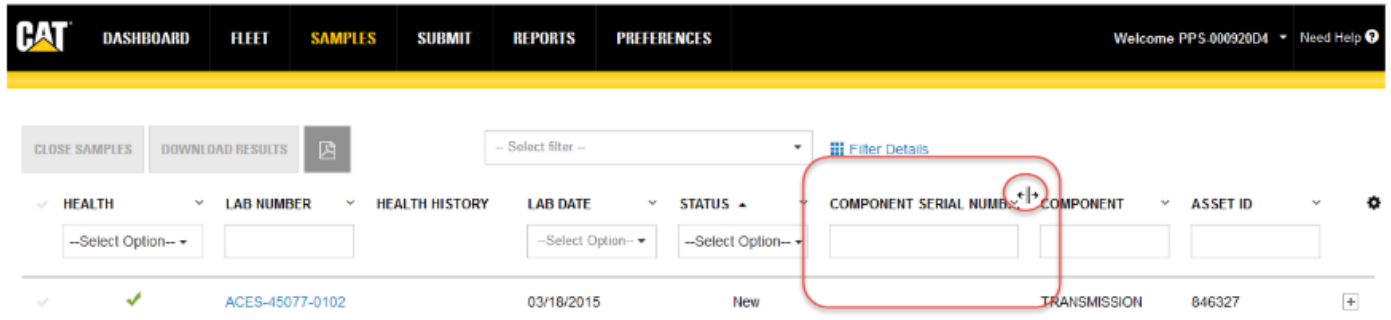
The screenshot shows the CAT software interface with the 'HEALTH HISTORY' table. The 'HEALTH HISTORY' column header is highlighted with a red circle, and a red arrow points to the right, indicating it is being moved. The table contains several rows of data, including one for 'TRANSMISSION POWER...'.

Drag the column to the desired location then release the mouse button. In a moment, the application will reorganize the table with the column in the new location. When you log out, the system saves the latest configuration so that the table will appear the same in your future sessions.

NOTE: The check mark column is always displayed in the far-left column of the table and cannot be moved or removed.

Sizing Columns

You can adjust the width of columns by hovering the mouse cursor between column edges until you see a double-line arrow as shown in the example. Then hold down the left mouse button, drag the column to the desired width then release the mouse button.



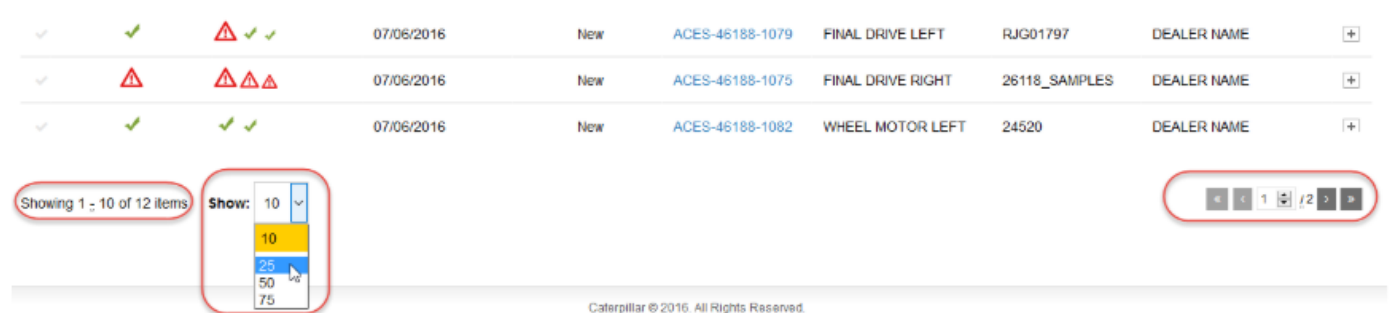
Navigating and Managing Samples Lists

Paging controls appear at the bottom of the table (left and right) to facilitate navigation through longer lists of data.

A **Showing** label identifies the range of results displayed.

A **Show** filter identifies the number of results shown within the table. As the options suggest, you can show 10, 25, 50, or 100 samples per page.

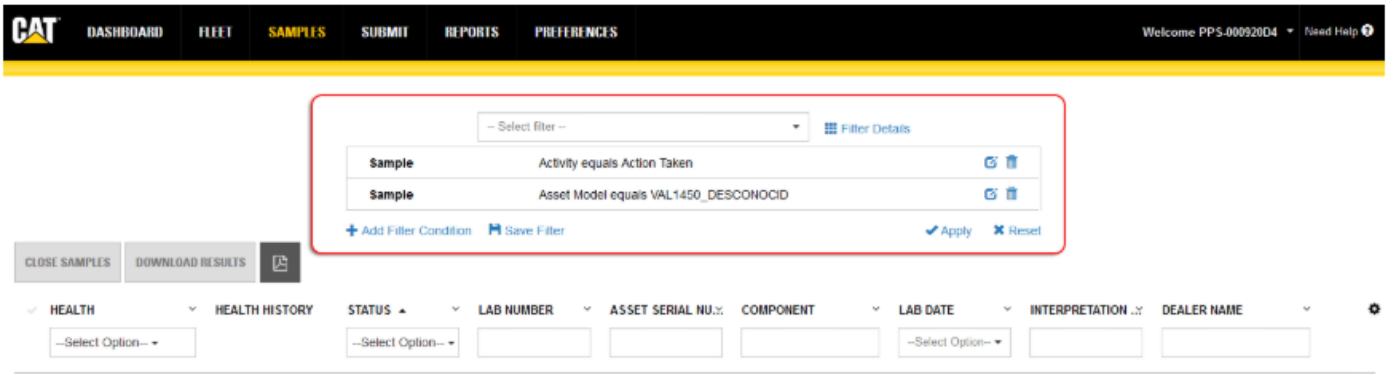
Controls to the right allow you to select from multiple pages for longer sample sets.



USING ADVANCED FILTERS

Many column headers in the main *Samples* table provide direct filtering capabilities to help you locate specific samples within your list of samples. In addition, the Advanced Filters feature helps you further narrow down data by giving you the tools to specify multiple conditions (properties) for a given filter, so you can customize the information displayed based on the filter selected.

If you end your session with a filter selected, when you log back in, the system will retain the last filter used and the data presented will be filtered accordingly. In addition, filters set via the column headers will also persist between sessions.

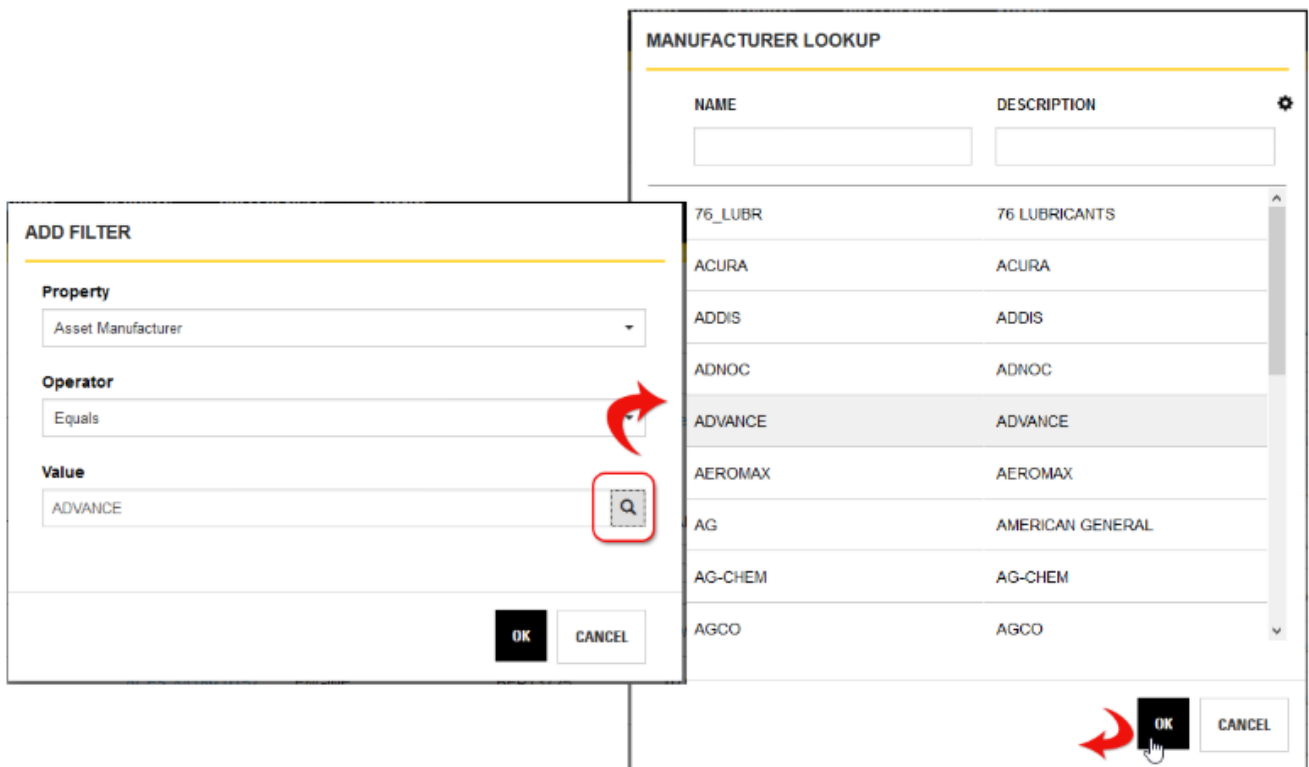


You can use existing filters by clicking on the arrow to the right of the **Select filter** drop-down list then clicking on the desired filter shown in the list.

Create new filters by clicking on **Filter Details** then **Add Filter Condition**.

Specify filter criteria by using lists to choose the property, operator, and in many cases predefined values based on the filter types.

In other cases, you will need to know the value to enter directly, or you may be presented with a *Lookup Value* dialog box to help you quickly retrieve condition values from information stored in the database.



To further refine search parameters, click again on **Add Filter Condition** and specify the additional parameters needed.

After creating a new filter, you can click on **Apply** to have the system refine the samples list presented. Note that applying the filter does not save the filter for future use.

Be sure to click on **Save Filter** to add the new filter to your list.

Clicking on **Reset** clears all advanced filter fields, deselects the active advanced filter, and updates the samples display accordingly.

NOTE: Clicking on **Reset** does not affect filters selected via the column headers. To clear those filters, click on the **Settings** gear icon located top right of the table then click on **Clear all filters**.

CLOSING SAMPLES

"New" and "In Progress" samples can be closed under the following conditions. They must have overall interpretations of:

- NC (No Comment)
- NAR (No Action Required)
- MC (Monitor Compartment)
- AR (Action Required, but only if an action has been associated with the sample)
- AR+ (Urgent Action Required, but only if an action has been associated with the sample)

If the preceding conditions have been met for one or more samples you want to close, check the samples then click on the **CLOSE SAMPLES** button (above left of the **Samples** table).

If the system confirms that the criteria for closing the sample(s) have been met, a confirmation dialog box will appear to ensure that you want to complete the action.

If you attempt to close selected samples that do not match the criteria, the system will display a message alerting you that one or more of the selected samples does not match the criteria for closing.

DOWNLOADING DATA

The data set represented in the **Samples** table can be downloaded as a spreadsheet file in Microsoft XLS format.

The columns in the download will comprise all of the available columns for the **Samples** table. Results will be downloaded with a column for each result.

You can download results or summary for selected samples by highlighting the check mark for the sample(s) desired then clicking on the **DOWNLOAD RESULTS** or **DOWNLOAD HISTORY** buttons.

Downloading results is limited to a maximum of 10,000 records, while downloading sample summary is limited to 15 records. The limits can also be refined by the system administrator.



If your selected download exceeds the specified limit, the system will notify you of the issue so you can narrow your selection or accept a truncated download set.

SAMPLE DETAILS VIEW FEATURES AND FUNCTIONS


The *Sample Details* view appears when you click on the **Lab Number** column for a specific sample. This view displays all the data currently stored in the database for the selected sample. As the example illustrates, this view includes a variety of fields and tables showing you information about the customer, user logged in, sample information, asset information, date the sample was received, and more.

The **Sample Details** view comprises three main areas: the General Information area, the Recommendation area, and the History/Log/Attachments area.

SAMPLE ACTIVITIES New In Progress Close

-Choose activity- **APPLY**  

ACES-43046-0037 **Sampled Date:** 02/14/2013 **Label Number:** 1302150135 **Activity:** None **Missing Info:** - **Attachments:**

Barcode: - **Created By:** **Created On:**  **On** 02/14/2013

ASSET INFORMATION **FLUID INFORMATION**


Asset Serial Number: AT500334	Component: HS	Calculated Meter on Fluid: 0 HR	Fluid Change: -
Asset ID: 08-1243	Meter Reading: 54004 HR	Meter on Fluid: 0 HR	Component Meter: HR
Manufacturer & Model: CATERPILLAR 16H	Work Order No: KIEWIT MINING GROUP	Filter Change: -	Fluid Brand / Fluid Type: SHELL/
Ownership & Location: THOMPSON MINES MINE SITE 3		Makeup Fluid: 0	Fluid Weight: 10
			Kidney Loop: -


RECOMMENDATION

OIL Sample  **Condition satisfactory, continue to sample at recommended interval.**

Reported on: 02/14/2013
 Reported by: MIGR_USER
 Report distributed on:

History **Activity Log** Attachments

LAB INFORMATION 

SAMPLED DATE	LAB NUMBER	HEALTH	METER	METER ON FLUID	FILTER CHANGE	FLUID CHANGE	FLUID BRAND	FLUID TYPE
02/14/2013	ACES-43046-0037		54004	0	-	-	SHELL	

WEAR METALS

Sampled Date	Cu	Fe	Cr	Pb	Sn	Si	Al	Ni	P	Mo	Ag	Ti	V	Cd	Mn

General Information Area

The top area of the page includes six sections:

1. **Sample Activities**-the status of a sample is controlled by the **Sample Activities** drop-down list located in the top left corner of the page
2. **Sample Status**-a graphical representation of the current status of the sample. This section is read-only; it cannot be used to change the sample status.
3. **Report Tools**-used to generate a Trend Graph or download a LIMS customer report (without contact information).
4. **Sample Summary**-includes fields that describe the sample.
5. **Asset Information**-includes fields that describe the asset from which the sample was acquired.
6. **Fluid Information**-includes fields that describe details about the fluid taken as the sample.

SAMPLE ACTIVITIES
 -Choose activity- APPLY

New In Progress Close



ACES-46188-1074 Sampled Date: 07/06/2016 Label Number: Activity: None Missing Info: - Attachments:
 Barcode: - Created By: Created On: ⚠ On 07/07/2016

ASSET INFORMATION

Asset Serial Number:	26118_SAMPLES	Component:	FD_LT
Asset ID:	26118	Meter Reading:	16068 HR
Manufacturer & Model:	ATLAS COPCO DM50E	Work Order No:	
Ownership & Location:	THOMPSON MINES MINESITE 2		

FLUID INFORMATION

Calculated Meter on Fluid:	HR	Fluid Change:	Yes
Meter on Fluid:	HR	Component Meter:	HR
Filter Change:	-	Fluid Brand / Fluid Type:	/
Makeup Fluid:		Fluid Weight:	
		Kidney Loop:	-

RECOMMENDATION

OIL Sample

Reported on: 07/07/2016
 Reported by: HEEKEBW
 Report distributed on: 07/07/2016



INSPECT FOR SOURCE OF DIRT ENTRY INTO THE SYSTEM. INSPECT DRAIN PLUG FOR DEBRIS. RESAMPLE IN 100 HOURS.

Recommendation Area

The **Recommendation Area** provides you with further action (if any) recommended for the sample. It includes the recommendation text and an icon indicating the alert level for the sample.

RECOMMENDATION

OIL Sample

Reported on: 07/07/2016
 Reported by: HEEKEBW
 Report distributed on: 07/07/2016



INSPECT FOR SOURCE OF DIRT ENTRY INTO THE SYSTEM. INSPECT DRAIN PLUG FOR DEBRIS. RESAMPLE IN 100 HOURS.

History / Activity Log / Attachments Area

The bottom of the page includes three tabs-**History**, **Activity Log**, and **Attachments** that provided specific information related to the sample.

History Tab

The **History** tab shows the analyses results for the current sample along with up to four of the immediately preceding samples for the same component.

Depending on the size of the screen, the application will automatically organize the view and will display the history tables so that the information is visible with minimum interaction from the user. For example, in the example below, a larger resolution screen allows the tables to be displayed in full view. On screens with lower resolutions, some tables may be displayed side by side, with collapsible columns.

Clicking on the **Show more results** link at the bottom of the page (when applicable) will show the entire history for the sampled component.

When no results are available for a particular test, the test column will not be shown. If none of the tests within a table has results, the table will not be displayed.

All history data can be downloaded as a Microsoft XLS file by clicking on the download (MS Excel "X") icon in the top right of the tab.

LAB INFORMATION							
SAMPLED DATE	LAB NUMBER	HEALTH	METER	METER ON FLUID	FILTER CHANGE	FLUID CHANGE	FLUID BRAND
07/06/2016	ACES-46188-1003	✓	67301	453	-	-	
05/27/2016	ACES-46148-1107	✓	66848	680	-	Yes	
03/01/2016	ACES-46061-1149	⚠	66014		-	Yes	

WEAR METALS										
Sampled Date	Cu	Fe	Cr	Pb	Sn	Si	Al	Ni	P	Mo
07/06/2016	0	260	6	0	0	21	1	47	231	0
05/27/2016	4	178	3	1	1	17	2	4	208	0
03/01/2016	7	338	7	0	0	45	5	7	192	0

ADDITIVES / FORMULATION									
Sampled Date	V100	Ca	Si	Mo	P	Zn	Mg	Cu	Na
07/06/2016	48.3	6	21	0	231	12	0	0	0
05/27/2016	49.6	22	17	0	208	25	1	4	1
03/01/2016	40.2	48	45	0	192	38	1	7	0

CONTAMINANTS															
Sampled Date	W	Na	K	Si	Al	Fe	Pb	Ca	Zn	ISO	4µ	6µ	14µ	21µ	38µ
07/06/2016	N	0	0	21	1	260	0	6	12	DARK					
05/27/2016	N	1	1	17	2	178	1	22	25	23/23/19	62688	43616	3761	323	20
03/01/2016	N	0	0	45	5	338	0	48	38	DEBRIS					

OIL CONDITION				
Sampled Date	ST	OXI	NIT	SUL
07/06/2016	3	81	4	83
05/27/2016	0	74	4	68
03/01/2016	0	58	4	54

Activity Log Tab

Using the **Activity Log** tab, you can view all of the key events for the selected sample. These events include:

- Basic sample life cycle events such as when the sample was created, received, authorized, and so on.
- Any activity generated from the **Sample Activities** drop-down.

The application will display the sample events in chronological order, with the newest displayed at the top of the list.

Several main events (created, updated, emailed, and closed) and secondary events for update (changed status, changed health level, created interpretation, repaired, and so on) can appear in the log. When needed, additional details will be shown. For interpretation, the actual interpretation text will be shown; for a repair, the component, date, and result of the repair will be displayed.

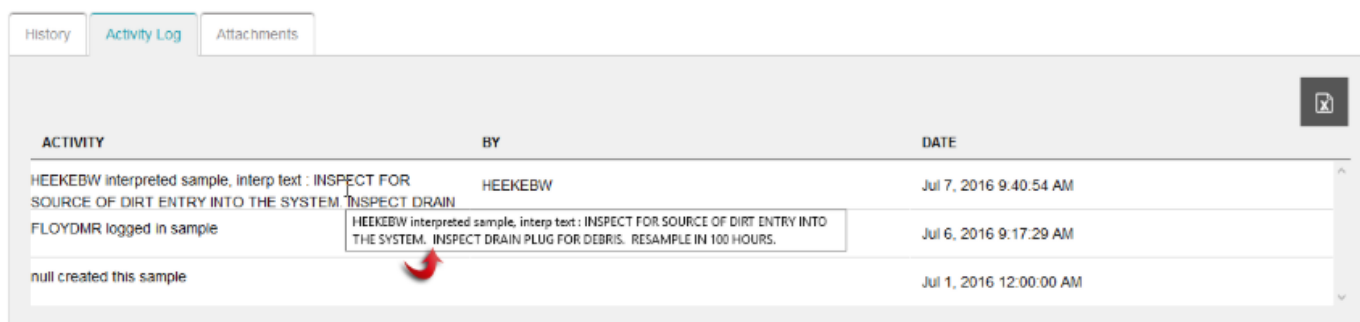
An email event can also trigger one or more secondary actions (created attachment) based on the number of attachments included in an email.

When the contents of an event (commonly interpretation) are too long to display in the space provided, hovering the mouse cursor over the event text will display the complete text in a small dialog box.

You can edit and/or delete sample activities only if you performed them. If transitioned to a different status, edit/delete will not be available for previous events.

Email events cannot be edited or deleted. Any action before the transition of the sample to NEW cannot be edited or deleted.

The *results* element within an entry can be up to 650 characters long. In cases where the entry is too long to display properly, it will be truncated within the **Activity Log** tab.



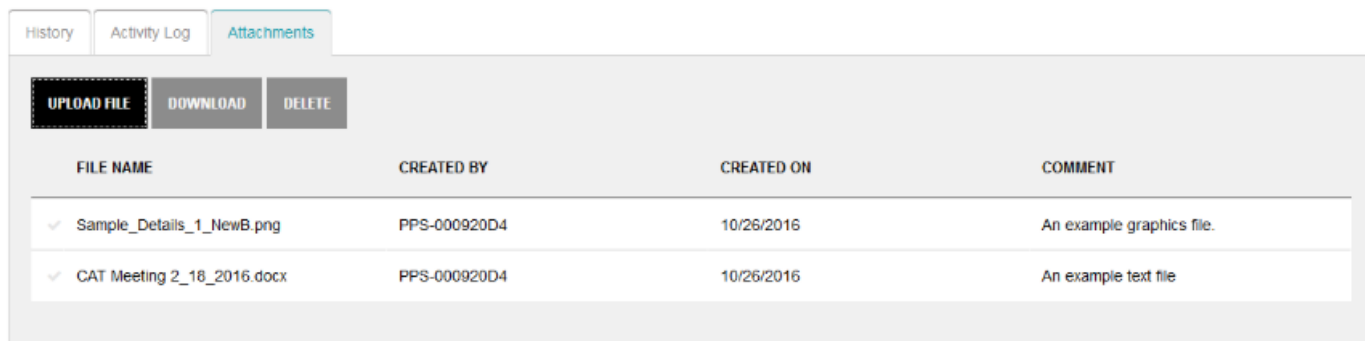
ACTIVITY	BY	DATE
HEEKEBW interpreted sample, interp text : INSPECT FOR SOURCE OF DIRT ENTRY INTO THE SYSTEM	HEEKEBW	Jul 7, 2016 9:40:54 AM
FLOYDMR logged in sample	HEEKEBW interpreted sample, interp text : INSPECT FOR SOURCE OF DIRT ENTRY INTO THE SYSTEM. INSPECT DRAIN PLUG FOR DEBRIS. RESAMPLE IN 100 HOURS.	Jul 6, 2016 9:17:29 AM
null created this sample		Jul 1, 2016 12:00:00 AM

Attachments Tab

The **Attachments** tab shows the attachments uploaded for the sample being viewed. A number appears next to the **Attachments** field in the general information area at the top of the *Sample Details* view so users will be aware that attachments have been added for the selected sample.

Files can be uploaded, downloaded, or deleted from the tab using the controls found at the top of the tab.

NOTE: *Attachments can be deleted only if the currently logged in user created the file.*



FILE NAME	CREATED BY	CREATED ON	COMMENT
✓ Sample_Details_1_NewB.png	PPS-000920D4	10/26/2016	An example graphics file.
✓ CAT Meeting_2_18_2016.docx	PPS-000920D4	10/26/2016	An example text file

To download or delete a file, ensure that the check mark appears to the left of the target file before selecting the desired function.

When you click on **Upload File**, a dialog like the one shown below appears so you can locate the file you want to upload. A field appears to the right of the upload file field so you can add a description or other note, which will also appear in the **Attachments** tab.

UPLOAD FILES

CAT Meeting
2_18_2016.docx

An example text file

REMOVE FILE

CHOOSE FILE

OK CANCEL

USING THE TREND GRAPH

The **Trend Graph** opens for the selected sample by clicking on the "graph" icon in the top right of the page. The Trend graph provides controls and options to help you view specific details about the sample.

The graph opens with the sample date as the default X-axis and the component pane hidden.

A wide range of the available analysis/result types can be selected from the header bar at the top of the graph.



Range drop-down list

This drop-down list helps you select the date range desired for the related sample. You can choose from:

- All samples
- Specific date ranges (Last Month, Last Quarter, Last Semester, or Last Year)
- Custom date range (enables **Start Date** and **End Date** fields)
- Custom sample range (enables **Last Samples** field to select last 5 samples, last 10 samples and so on)

Test Selection drop-down list

Allows for easy selection of test results to be displayed in the graph.

Show/Hide Data Table icon

Can be toggled on and off to display a data table below the graph.

Chart Types drop-down list

Allows you to switch the graph between chart types including line, area, curve, column, bar, and scatter. The default chart type is "line."

Settings (gear icon) popup box

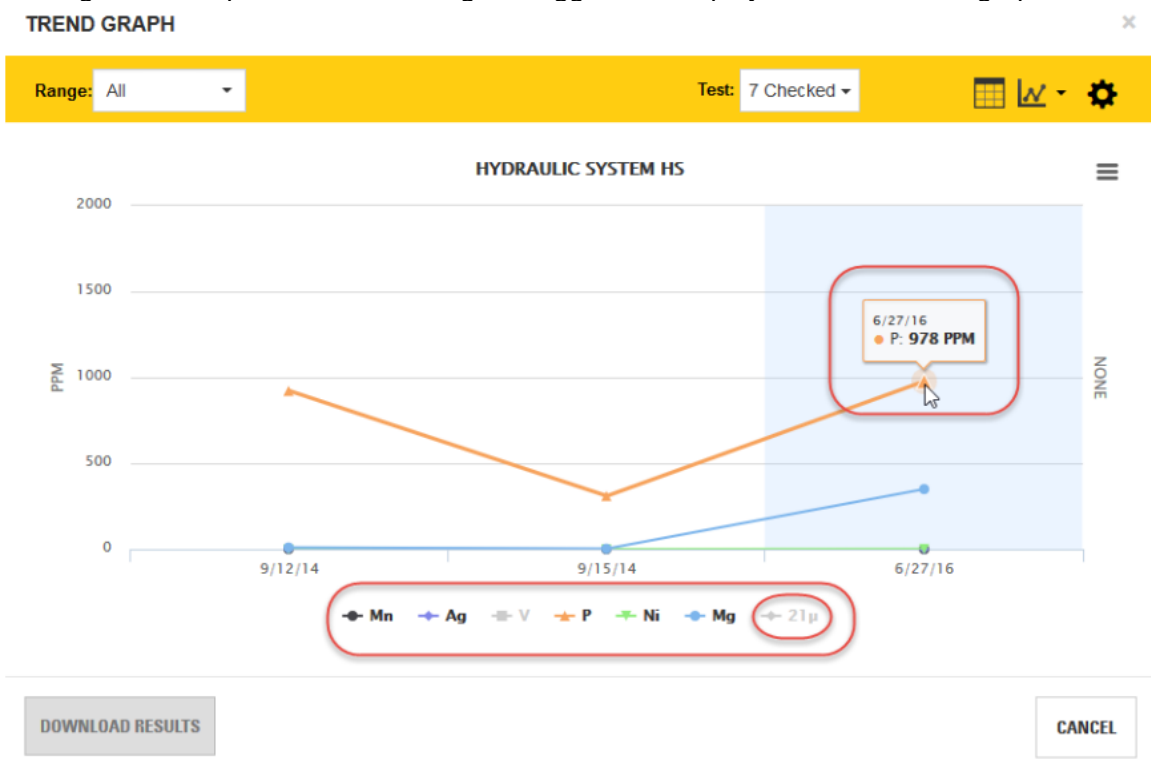
- Toggle X-Axis between meter and sample date.
- Check box to include analysis / test selection by Rate of Wear.
- Check box to include analysis / test selection by Normalized Rate of Wear.
- Normalization Factor input (this will apply to all Normalized Rates on the Graph at one time).

Download Results button

Clicking on this button downloads the selected data in a .CSV formatted file.

Graph Area Features

- Hold left mouse button down and drag to zoom and show more details of any area of the graph.
- Mouse-over a data point will show more details of that sample point.
- Legend below graph shows test abbreviations (data points).
- Clicking on a data point label in the legend toggles the display of the test in the graph.



HELP - SUBMIT

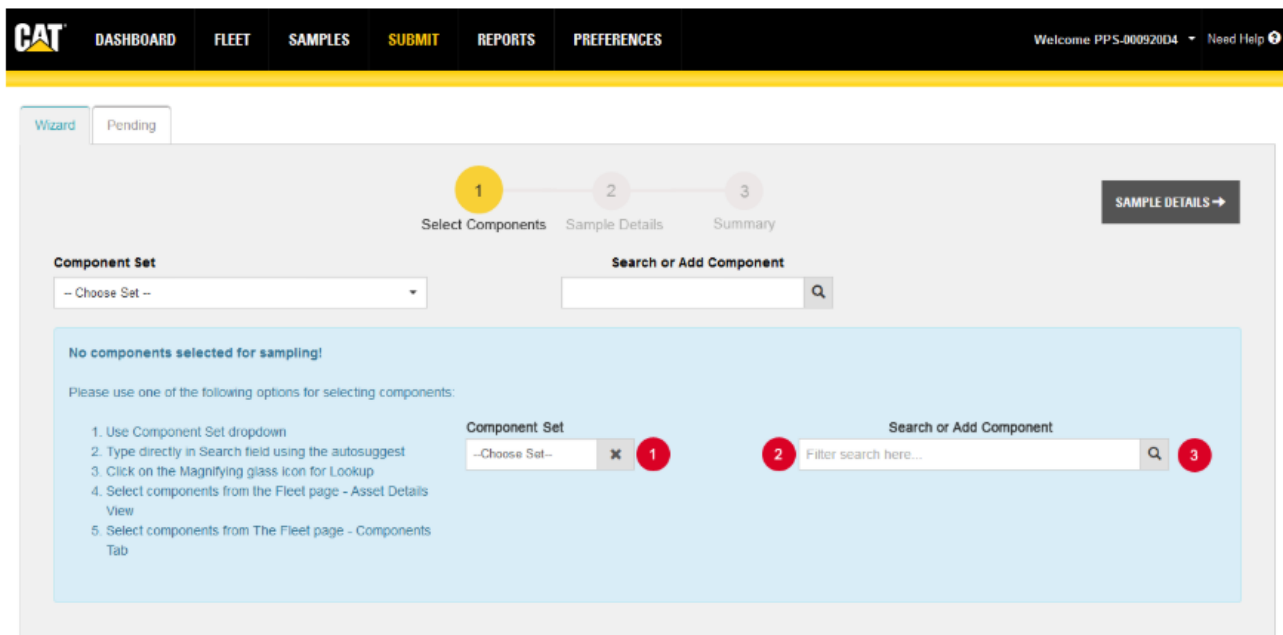
USING THE SUBMIT PAGE

The *Submit* page is used to submit information related to samples being sent for testing, and to monitor and manage information on pending samples.

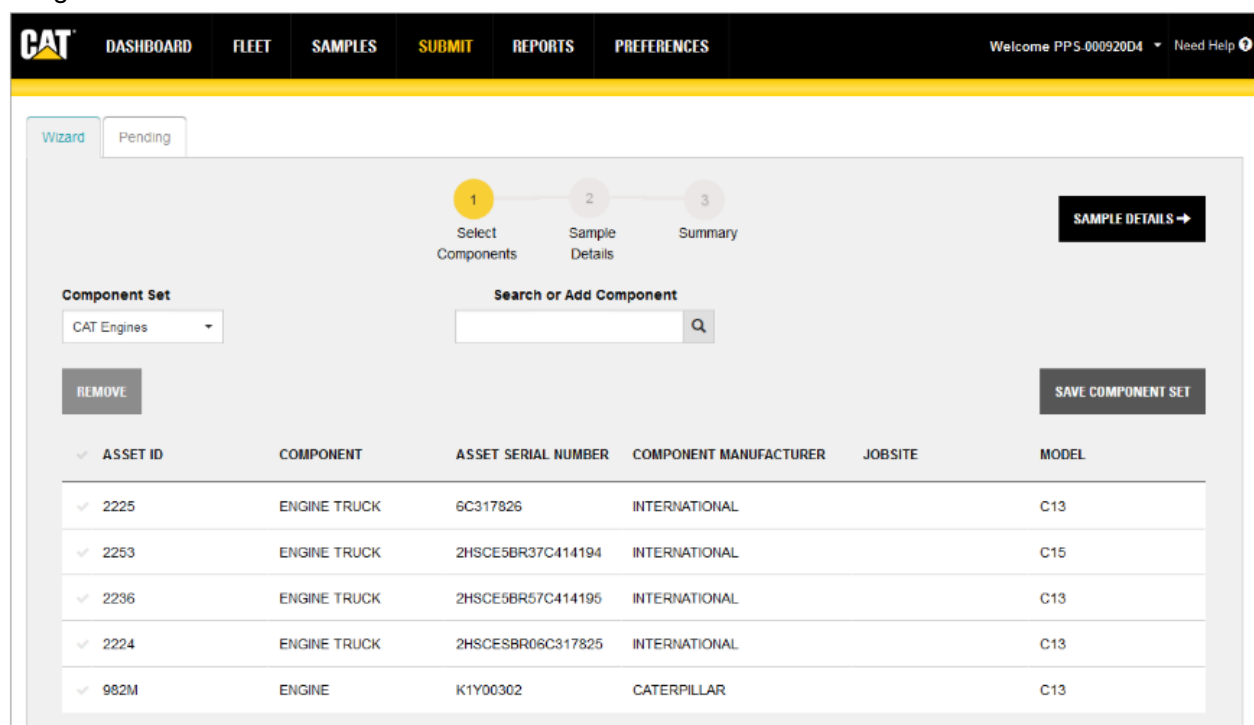
The *Submit* page has two tabs: **Wizard** and **Pending**. The **Wizard** tab contains a 3-step wizard used to select components for which samples will be submitted and to enter sample-specific information. The **Pending** tab is used to find and manage samples that have already been submitted.

The sample information submission process can be entered by going directly to the *Submit* page, or the process can be initiated from other pages in the application that automatically transfer you to the *Submit* page.

If you open the page for the first time, or enter the page with no components selected, an instructional graphic appears as shown below to guide you through the sample submission process.



When you land on the *Submit* page after starting the submission process from another part of the interface, the application will automatically populate the table with the asset and component information for the new sample being submitted.



The *Submit* page allows the submission of duplicate samples. For example, if you take an initial sample, make a repair (such as addressing a leak issue), run the engine for a bit then re-sample.

WIZARD TAB FEATURES AND FUNCTIONS

The **Wizard** tab opens at the first step in a three-step process for submitting new sample information. During the first step, you must select the components that will be sampled.

Components can be added to the table using one of five methods:

1. Direct entry in the **Search or Add Component** field located above and center of the table.
2. Using the lookup feature (magnifying glass icon) of the **Search or Add Component** field.
3. Selecting an existing set from the **Component Set** drop-down list located above and left of the table.
4. Via the submit samples feature in the *Asset Details* view of the *Fleet* page.
5. Via the submit samples feature in the **Components** tab of the *Fleet* page.

When using the **Search or Add Component** field, start typing an asset ID or serial number and a suggest list appears to help you choose from available components.

Click on the magnifying glass icon to open a lookup dialog listing the available components. The lookup contains a selectable multi-column table with filter inputs as column headers along with check boxes for selecting multiple components.

The headers in this dialog also employ suggest and lookup features. For example, entering a partial value in the **ASSET ID** then pressing enter will provide the list of asset IDs including the partial value along with the components for those assets. You can then complete the asset ID or simply select the components needed from an asset for sample submission.

ASSET ID	COMPONENT	ASSET SERIAL NUMB...	COMPONENT MANUF...	JOBSITE
W3K00902	SWING DRIVE	W3K00902	CATERPILLAR	
W3K00902	HYDRAULIC SYSTEM	W3K00902	CATERPILLAR	
W3K00902	FUEL SYSTEM	W3K00902	CATERPILLAR	
W3K00902	FINAL DRIVE REAR ...	W3K00902	CATERPILLAR	
W3K00902	RADIATOR	W3K00902	CATERPILLAR	
W3K00902	FINAL DRIVE REAR ...	W3K00902	CATERPILLAR	
W3K00902	ENGINE	W3K00902	CATERPILLAR	

After the component table is populated, you can remove components that might not be needed by clicking on the **Check Mark** to the left of the component then click on the **REMOVE** button.

If the table contains a new set of components that you will create samples for again, you can create a new set and add it to the **Component Set** list by clicking on the **SAVE COMPONENT SET** button.

Component sets can be managed in the **Filters** tab within the *Preferences* page.

ASSET ID	COMPONENT	ASSET SERIAL NUMBER	COMPONENT MANUFACTURER	JOBSITE	MODEL
✓ W3K00902	SWING DRIVE	W3K00902	CATERPILLAR		
✓ W3K00902	HYDRAULIC SYSTEM	W3K00902	CATERPILLAR		
✓ W3K00902	FUEL SYSTEM	W3K00902	CATERPILLAR		
✓ W3K00902	FINAL DRIVE REAR L...	W3K00902	CATERPILLAR		
✓ W3K00902	RADIATOR	W3K00902	CATERPILLAR		
✓ W3K00902	FINAL DRIVE REAR RI...	W3K00902	CATERPILLAR		
✓ W3K00902	ENGINE	W3K00902	CATERPILLAR		C9

After clicking on the **Check Marks** to select one or more components for sample submission, the **SAMPLE DETAILS** button will be enabled. Click on the button to go to step 2.

As with most wizard-style user interfaces, navigation buttons are provided to go back to the previous step or forward to the next step (provided all required fields have been completed). For this view, the **ADD SAMPLES** button returns you to step 1 and the **SUBMIT SAMPLES** button continues to step 3.

ASSET ID	COMPONENT	ASSET SERIAL NUMBER	COMPONENT MANUFACTURER	JOBSITE	MODEL
✓ W3K00902	SWING DRIVE	W3K00902	CATERPILLAR		
✓ W3K00902	HYDRAULIC SYSTEM	W3K00902	CATERPILLAR		
✓ W3K00902	FUEL SYSTEM	W3K00902	CATERPILLAR		
✓ W3K00902	FINAL DRIVE REAR L...	W3K00902	CATERPILLAR		
✓ W3K00902	RADIATOR	W3K00902	CATERPILLAR		
✓ W3K00902	FINAL DRIVE REAR RI...	W3K00902	CATERPILLAR		
✓ W3K00902	ENGINE	W3K00902	CATERPILLAR		C9

The input fields in the *Sample Details* view are arranged in sections:

- Asset information—appears at the top of the view with a dark gray background.
- Component identification—presented in a mid-gray separator.
- Component sample details—appear below each separator with a light gray background.

Use the **Delete** (trash can) icon appearing at the right end of each separator to delete the related component from the list. A confirmation dialog appears to ensure that you want to delete the selected component.

Sample Date is the only required field in this view, but providing as much information as possible is recommended to assist in the processing, tracking, and historical analysis of the submitted samples.

Saving Drafts

You have the option of entering information for components and not submitting the samples immediately. When you click on the **SAVE TO DRAFT** button, you can leave the page then return at a later time and resume the process.

When you return to the *Submit* page, you will start at step 1 with the saved component(s) selected. You can go directly to step 2, or add components to create additional samples before proceeding.

When you get to step 2, the application will automatically populate the fields with the information previously entered for the saved component(s).

NOTE: Leaving the page without clicking **SAVE TO DRAFT** results in a reset of all fields and loss of data entered.

After you have completed entering information in the *Sample Details* view, click on the **SUBMIT SAMPLES** button to commit the information to the database. Sample information will then be viewable in the **Pending** tab until the physical samples are received by the lab.

Step 3 of the wizard is simply a confirmation step. The information is organized in the same sections as step 2, except the fields are read only. However, you can modify or delete a submitted sample by going to the **Pending** tab.

You can print labels for the samples currently shown within the page by clicking on the **PRINT LABELS** button, or you can review the information via the **Pending** tab, make changes if needed, then print the labels from that page.

The screenshot displays the CAT software interface in the 'Pending' tab. At the top, a navigation bar includes 'CAT', 'DASHBOARD', 'FLEET', 'SAMPLES', 'SUBMIT', 'REPORTS', and 'PREFERENCES'. The user is logged in as 'Welcome PPS-000920D4' and has access to 'Need Help'. The main content area features a progress indicator with three steps: '1 Select Components', '2 Sample Details', and '3 Summary'. A 'SELECT COMPONENTS' button is located on the left. Below the progress indicator, a dark gray section contains the following fields: 'Sampled Date' (10/28/2016), 'Asset Meter' (3000), 'Dealer Branch' (MINESITE 2), 'Location' (SWING DRIVE//), 'PM Interval', and 'Shop Job' (123). A 'PRINT LABELS' button is positioned on the right. The bottom section contains various fields: 'Previous Meter' (2490), 'Fluid Brand' (CAT), 'Filter Change' (Y), 'Notes', 'Kidney Loop' (U), 'Sample Label No' (12345), 'Fluid Weight' (50), 'Makeup Fluid Units' (qt), 'Priority' (NORMAL), 'Component Meter' (900), 'Meter On Fluid' (300), 'Fluid Change' (Y), 'Makeup Fluid' (1), and 'Fluid Type' (OIL).

USING THE PENDING TAB

The **Pending** samples tab allows you to find and view previously submitted samples. Start your sample search by using the **Lab Date** drop-down list.

You can then refine the entries listed in the table by using the fields below the column headers to filter the list.

The screenshot shows the CAT Pending Samples interface. At the top, there is a navigation bar with tabs for DASHBOARD, FLEET, SAMPLES, SUBMIT, REPORTS, and PREFERENCES. The user is logged in as 'Welcome PPS-000920D4'. Below the navigation bar, there are tabs for 'Wizard' and 'Pending'. The 'Pending' tab is active. On the left, there are buttons for 'MODIFY' and 'DELETE'. On the right, there is a 'PRINT LABELS' button. Below these buttons, there are search filters for ASSET ID (containing 'W3K'), ASSET SERIAL NO., COMPONENT, LABEL NO., METER, and LAB DATE (set to 'Last 60 Days'). Below the filters is a table of sample entries. The table has columns for ASSET ID, ASSET SERIAL NO., COMPONENT, LABEL NO., METER, and LAB DATE. The entries are as follows:

ASSET ID	ASSET SERIAL NO.	COMPONENT	LABEL NO.	METER	LAB DATE
3-097	1NKDLB9X94R064669	DIFFERENTIAL REAR			08/23/2016
3-097	1NKDLB9X94R064669	DIFFERENTIAL REAR			08/24/2016
3-097	1NKDLB9X94R064669	DIFFERENTIAL FRONT			08/24/2016
3-097	1NKDLB9X94R064669	DIFFERENTIAL FRONT			08/23/2016
W3K00902	W3K00902	SWING DRIVE		0	08/25/2016
W3K00902	W3K00902	FINAL DRIVE REAR RI...		0	08/25/2016
W3K00902	W3K00902	FINAL DRIVE REAR L...		0	08/25/2016
L-20	33Z00653		null	1596	07/01/2016
L-20	33Z00653		null	1596	07/01/2016
L-20	33Z00653		null	1596	07/01/2016

At the bottom of the table, it says 'Showing 1 - 10 of 19 items' and 'Show: 10'. There are also navigation arrows and a page number '1 / 2'.

Samples that have not yet been received by the lab can be deleted or modified by clicking on the sample's **Check Mark** then clicking on the **Modify** or **Delete** button.

The screenshot shows the same CAT Pending Samples interface as above. In this view, the 'MODIFY' and 'DELETE' buttons are highlighted with a red circle. The 'LAB DATE' filter is set to 'Last 60 Days'. The table of sample entries is as follows:

ASSET ID	ASSET SERIAL NO.	COMPONENT	LABEL NO.	METER	LAB DATE
W3K00902	W3K00902	SWING DRIVE		0	08/25/2016
W3K00902	W3K00902	FINAL DRIVE REAR RI...		0	08/25/2016
W3K00902	W3K00902	FINAL DRIVE REAR L...		0	08/25/2016
W3K00902	W3K00902	FINAL DRIVE REAR L...	12345	2490	08/25/2016
W3K00902	W3K00902	SWING DRIVE	12346	2490	08/25/2016
W3K00902	W3K00902	FINAL DRIVE REAR RI...	12347	2490	08/25/2016

The checkmark in the first column of the second row (W3K00902, FINAL DRIVE REAR RI...) is highlighted with a red circle.

If you choose to delete a sample a message dialog appears to confirm the action.

NOTE: Only the user who originally creates a sample submission can delete the submission.

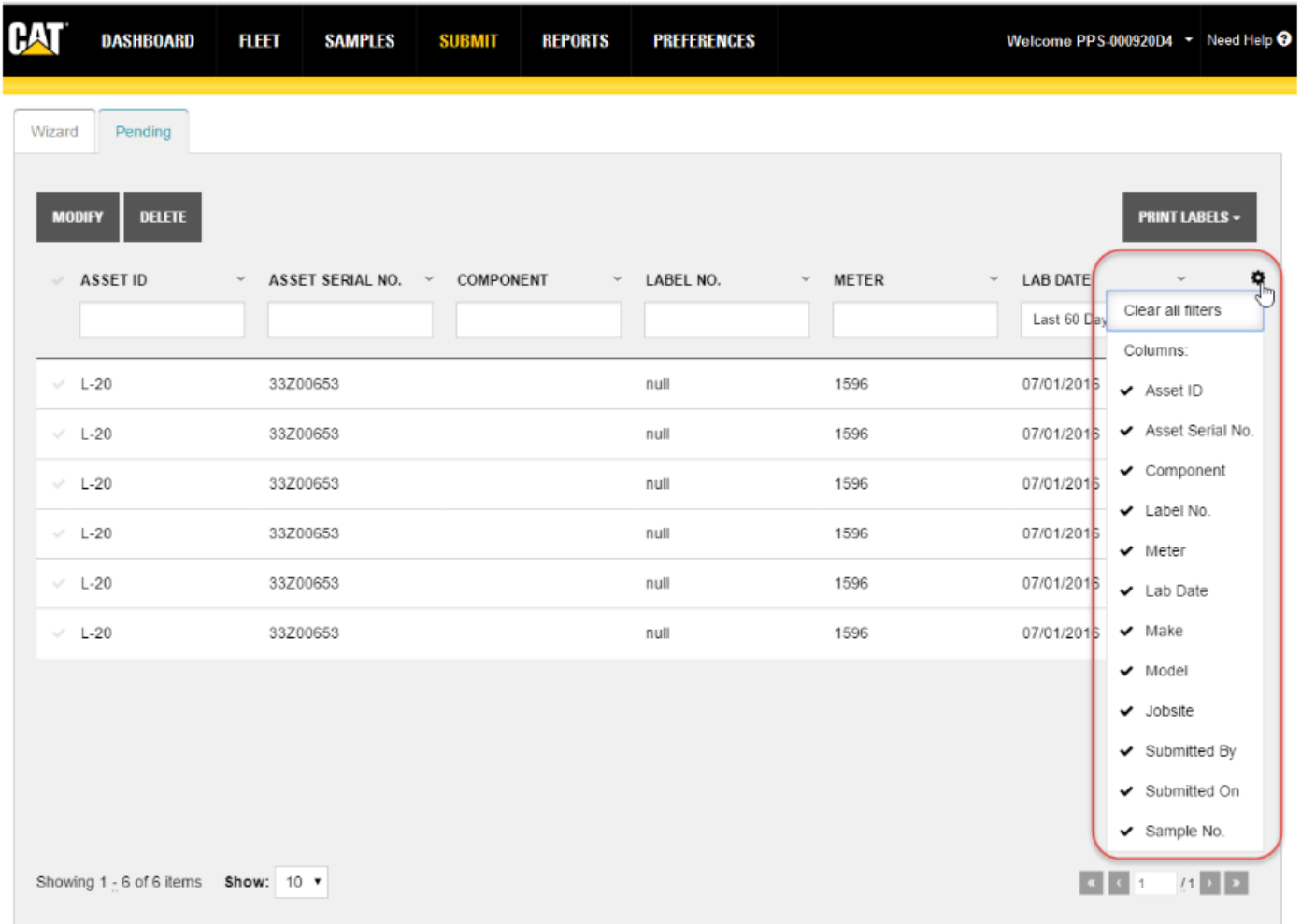
If you choose to modify information for a sample, the software will take you back to the Sample Details step where you can revise the information that needs changing before you re-submit the sample(s).

Table Columns

Choosing Columns to Display

Click on the **Settings** (gear) icon found to the right of the column headers to open a drop-down list as shown below. A check mark appearing to the left of a column title signifies that the column will appear within the table; an X mark hides the related column.

Click anywhere outside the drop-down list to close it.



The columns that actually appear within the table view depend on the screen real estate available. If more columns are selected than space allows, a plus sign (+) icon appears to the right of the rows signifying that additional information is available.

Clicking on the plus sign (+) icon within a specific row expands the row as shown in the example so you can view the additional information as needed. Scroll bars are used to help you view content that is longer or wider than what can be shown within the display area.

The changes made to column settings will persist as your preference, so when you log out then return to the system, you will see the columns and the order appear based on the last defined settings.

Wizard Pending

MODIFY DELETE PRINT LABELS -

ASSET ID	ASSET SERIAL NO.	COMPONENT	LABEL NO.	METER	LAB DATE
L-20	33Z00653		null	1596	07/01/2016
L-20	33Z00653		null	1596	07/01/2016
<p>Make:</p> <p>Model:</p> <p>Jobsite:</p> <p>Submitted By: DOUG CHANDLER</p> <p>Submitted On: 06/30/2016</p>					
L-20	33Z00653		null	1596	07/01/2016
L-20	33Z00653		null	1596	07/01/2016
L-20	33Z00653		null	1596	07/01/2016
L-20	33Z00653		null	1596	07/01/2016

Showing 1 - 6 of 6 items Show: 10

Sorting and Filtering via Column Headers

Column headers are displayed at the top of each column. The headers identify the information displayed in the columns, and they allow you to sort and filter the table data.

To sort data in ascending or descending order, click on the small arrow to the right of a column header then select the desired order. Columns can also be hidden by clicking on the **x Hide Column** item in the header's menu.

Some column headers provide drop-down lists used to select information options; others use direct entry fields in which you can enter specific search elements to more quickly locate a particular sample.

Wizard Pending

MODIFY DELETE PRINT LABELS -

ASSET ID	ASSET SERIAL NO.	COMPONENT	LABEL NO.	METER	LAB DATE
L-20	33Z00653		null	1596	
L-20	33Z00653		null	1596	
L-20	33Z00653		null	1596	
L-20	33Z00653		null	1596	07/01/2016
L-20	33Z00653		null	1596	07/01/2016
L-20	33Z00653		null	1596	07/01/2016
L-20	33Z00653		null	1596	07/01/2016
L-20	33Z00653		null	1596	07/01/2016
L-20	33Z00653		null	1596	07/01/2016

Showing 1 - 9 of 9 items Show: 10

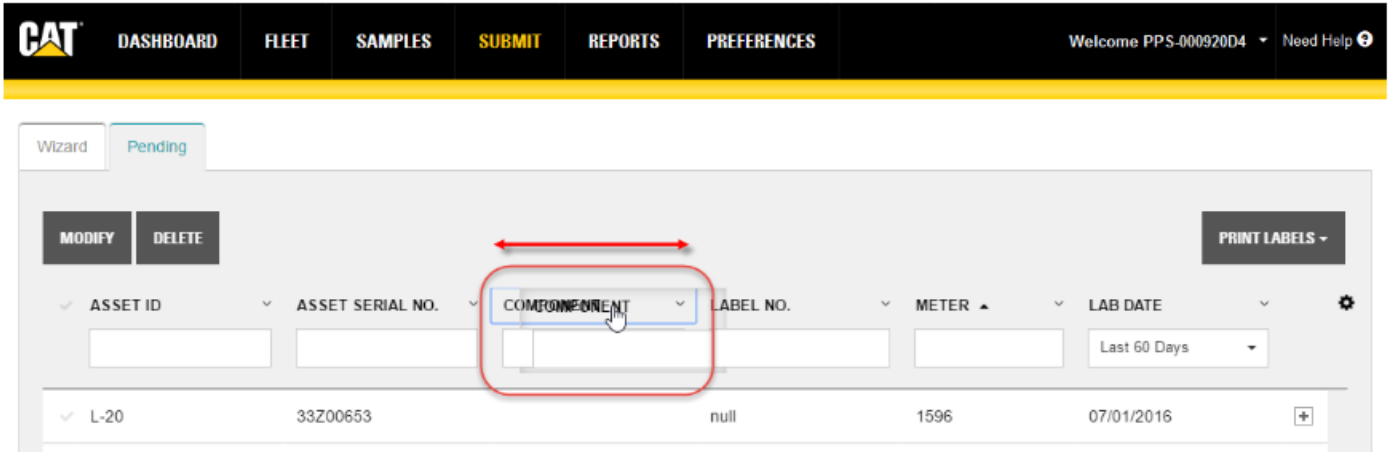
To clear header filters, click on the **Settings** gear icon located top right of the table then click on **Clear all filters**.

NOTE: Clicking on **Clear all filters** from **Settings** does not clear filters applied via the **Advanced Filters** feature. An active advanced filter must be cleared by clicking on **Reset** found in that section.

Arranging Columns

You can rearrange the order of the columns simply by dragging them to the location you want.

Move your mouse cursor over the column title, then click and hold the left mouse button down. As the image below shows, the selected column "detaches" from its original location to confirm which column you are moving.

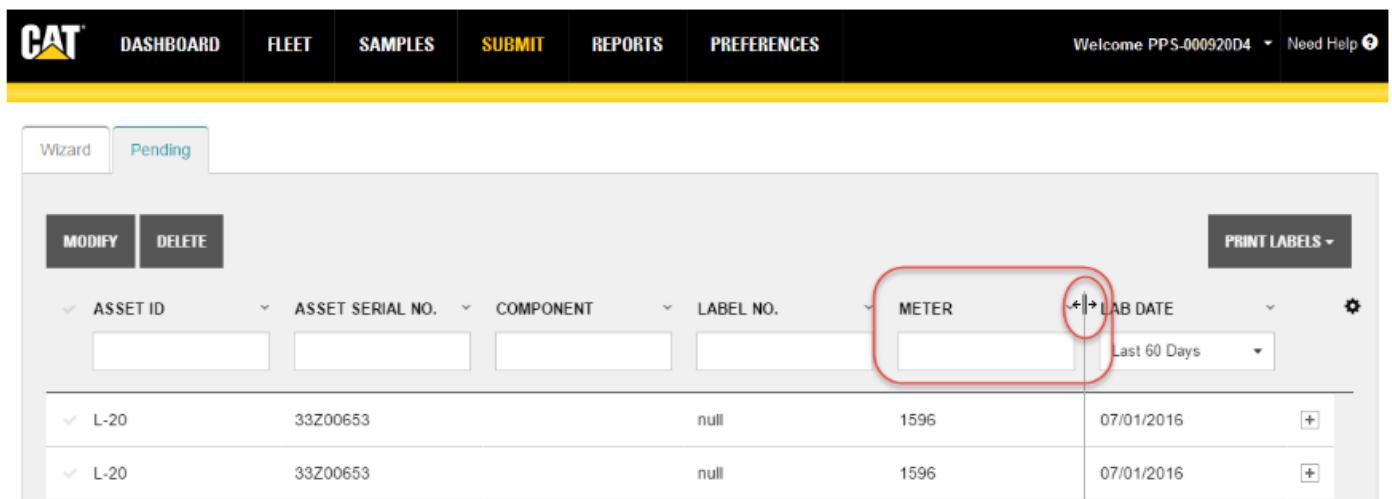


Drag the column to the desired location then release the mouse button. In a moment, the application will reorganize the table with the column in the new location. When you log out, the system saves the latest configuration so that the table will appear the same in your future sessions.

NOTE: The check mark column is always displayed in the far left column of the table and cannot be moved or removed.

Sizing Columns

You can adjust the width of columns by hovering the mouse cursor between column edges until you see a double-line arrow as shown in the example. Then hold down the left mouse button, drag the column to the desired width then release the mouse button.



Samples labels can be printed by checking the box to the left of one or more samples then clicking on the **PRINT LABELS** button. You will then select the label size needed and the system will automatically create the labels and display them in a new browser tab. You can then download the labels as a PDF file, or print them using your browser's controls.