

A large, light blue geometric graphic consisting of two overlapping triangles that form a larger, irregular shape. The top triangle points downwards, and the bottom triangle points upwards, creating a central white space where the text is located.

Asset IO for Dealer
***Condition Monitoring Portal
& EquipmentLink***

USER GUIDE

Updated June 13, 2019

UPTAKE

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DISCLAIMER

We update Condition Monitoring Portal & EquipmentLink frequently. This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates. Please review the most current version of this guide regularly and with care.

TRADEMARKS

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CUSTOMIZATION

This user guide will show you how to use the Condition Monitoring Portal & EquipmentLink application with the assumption that your dealership has made the migration to CloudLink and your Inventory application has been set up in a standard configuration. However, it should be noted that depending on your dealership's level of customization, or if your dealership hasn't migrated to CloudLink yet, your screens may look slightly different than those shown here.

NOTE: This user guide is currently being updated. Please check back frequently for the most recent version.

INTRODUCTION

Condition Monitoring Portal

The Condition Monitoring (CM) Portal is a workflow tool for Condition Monitoring Analysts (CMAs) to use when aggregating and reviewing machine data. Capturing incoming data from EquipmentLink, including SOS results, fault codes, work order history, service letters, inspections, and other supporting documents, CM Portal creates a comprehensive picture of ongoing machine health in an easy-to-use dashboard where the user can create fleets of equipment to monitor.

Alerts on problem areas can be aggregated, reviewed, and analyzed in a case format on the machine. Once the case has been analyzed, a dealer can create a recommendation in the form of a lead to send to the PSSR or shop.

CM Portal provides visibility to data and a workplace to analyze it, and then tracks the opportunity through to actionable service work order creation, giving CMAs the information they need to measure effectiveness and drive incremental revenue.

Navigating the CM Portal Dashboards



The dashboards in the CM Portal are composed of charts and tables that present different views of alerts, cases, and equipment.

There are two interactive features on the charts that will help you view values more easily:

- Click on a legend item to toggle its visibility on or off. The chart may automatically adjust to best display the visible information.
- Hover over points in a chart to view the exact value of that item at that spot.

The **Filters** section in the middle of the page empowers you to filter the information on the page by = fields, such as **Events**, **Divisions**, and **Families**. The filter options that display depend on the section of CM Portal you are viewing. The page automatically refreshes as you make your filter selections.

In summary tables:

- Click a column header to sort the table by that column.
- Click the **Gear**  icon to reload a grid, export grid contents to Excel, save your grid configuration, or reset your grid configuration.
- Click the **Eye**  icon (next to the Gear icon) to toggle column visibility on and off.

- Click on equipment serial numbers to view detailed information on that piece of equipment. See the EquipmentLink section for more information.
- Click non-zero numbers in grids to view details of all the items that comprise that number.

Alerts in CM Portal fall into one of three statuses, with associated color-coded identifiers:

- **NAR** – No Action Required (**Green**)
- **MC** – Monitor Compartment (**Yellow**)
- **AR** – Action Required (**Red**)

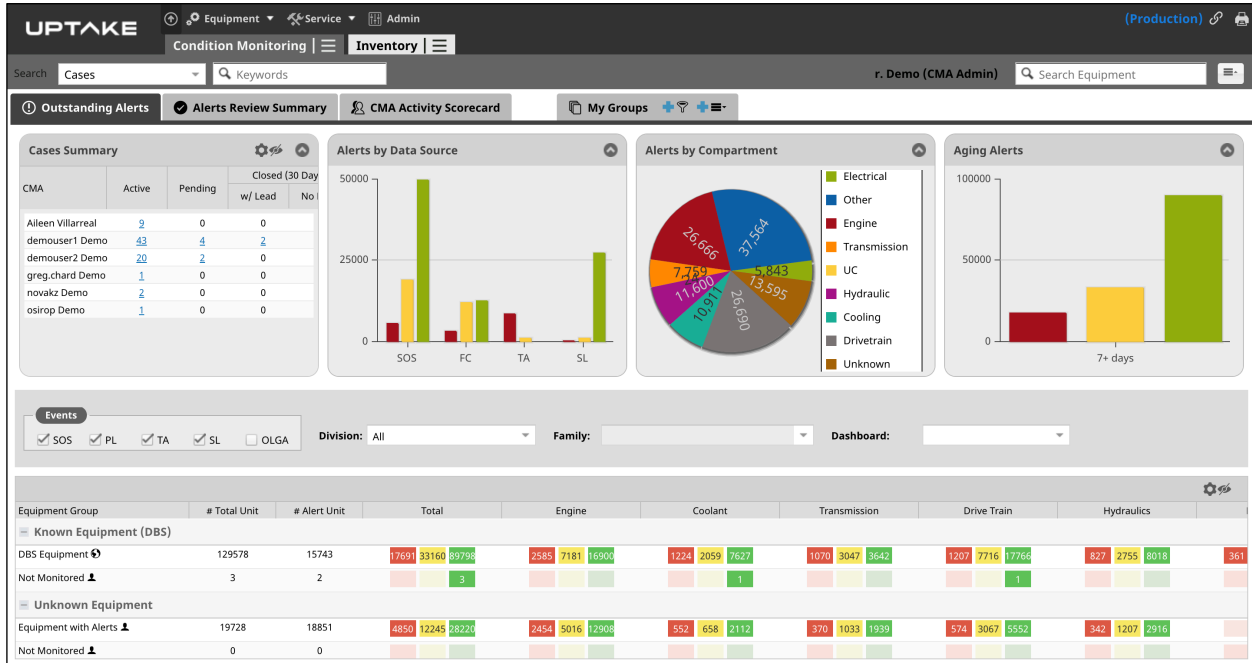
EquipmentLink

EquipmentLink is a serial number-centric view of equipment data, providing the user visibility and access to all logged information pertinent to any piece of equipment for CMAs.

NOTE: CloudLink currently only supports the Google Chrome browser.


Global Navigation

Log in to CloudLink with your Username and Password, then click the **[ENTER]** button under **Condition Monitoring**. You will be taken to the **CMA Dashboard** page.





Navigation Bar




At the top of the screen is a navigation bar that can be accessed from anywhere in the application. To hide this navigation bar, click the **Arrow**  icon. Click it again to show the navigation bar.

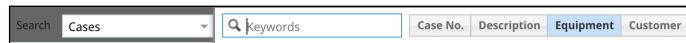
You can connect to other Uptake software products that the dealership utilizes by clicking on the **Equipment** and **Service** links found at the upper left portion of the page.

If you have CMP Admin Access, click the **Admin**  link to access and modify users, security settings, and equipment family settings.

Click the **Link**  icon to access admin settings, the main CloudLink landing page, your saved preferences, and an *About* page for the application.

Click the **Printer**  icon to generate a PDF version of the current display.

Use the **Search** menu and text field to search by keyword within **Cases**, **SOS Results**, **Electronic Data**, **Service Letters**, or **Inspections**. Choose an area to search within after typing your search term(s). The areas that display depend on the selection made in the menu.

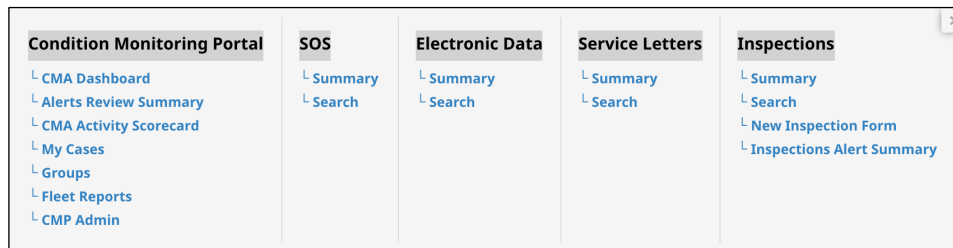


Use the **Equipment Search** field to search for specific assets. Click the **Recently Viewed** button to see the most recently viewed equipment.



Condition Monitoring Tab

Click the **Condition Monitoring** tab to access areas within the **Condition Monitoring** application: **Condition Monitoring Portal**, **SOS**, **Electronic Data**, **Service Letters**, and **Inspections**.



CONDITION MONITORING PORTAL

The **Condition Monitoring Portal** consists of the following sections:

- CMA Dashboard
- Alerts Review Summary
- CMA Activity Scorecard
- My Cases
- Groups
- Fleet Reports
- CMP Admin

CMA Dashboard

The **CMA Dashboard** displays various views of data about alerts:

- Cases Summary
- Alerts by Data Source
- Alerts by Compartment
- Aging Alerts

Additionally, you see alerts displayed by equipment groups.



Cases Summary

CMA	Active	Pending	Closed (30 Days)	
			w/ Lead	No Lead
Aileen Villarreal	2	0	0	0
demouser1 Demo	43	4	1	0
demouser2 Demo	20	2	0	0
greg.chard Demo	1	0	0	0
novakz Demo	2	0	0	0
osiroop Demo	1	0	0	0

The **Cases Summary** displays a list of CMAs and their corresponding *Active*, *Pending*, and *Closed (30 days)* cases. The *Closed (30 days)* cases has one column for “w/ Leads” and one for “No Leads.”

NOTE: SalesLink access is required to view leads.

The numbers in each column indicate the number of cases being worked on by the CMA. Click the number to navigate to a **Case List** page and view details about those cases.

The screenshot shows the Uptake Condition Monitoring interface. At the top, there are navigation tabs for 'Equipment', 'Service', and 'Admin'. Below this, there are search bars for 'Service Letters' and 'Keywords', and a user profile for 'r. Demo (CMA Admin)'. A filter section includes dropdowns for 'Division' (set to 'All') and 'CMA User' (set to 'demouser1 Demo'). There are checkboxes for 'Status' (Active, Pending, Closed with Lead, Closed without Lead) and 'Event Type' (SOS, PL, TA, SL, OLGA, Alert Related Only). A 'Date Search' section has 'Open Date' selected. 'Filter' and 'Clear' buttons are at the bottom right of the filter section.

Case #	Status	Open Date	Closed Date	Assigned To	Owned By	Make	Serial No	Customer No	Name	Description
100405	Pending	Aug 24 2018		Joey Glenn	demouser1 Demo	AA	0ADF45538	1012450	JVS CONTRACTOR LTD	TEST
100403	Pending	Aug 24 2018		Joey Glenn	demouser1 Demo	AA	0EGC45538	1337300	MMH CONSTRUCTION INC	TEST
100386	Pending	Jul 12 2018		Chanel Smith	demouser1 Demo	AA	0NMY39385	1848525	LUN MECHANICAL SERVICES INC	ttt
100401	Pending	Jul 27 2018		Christel Baird	demouser1 Demo	AA	0ALC39385	1848525	LUN MECHANICAL SERVICES INC	emission problems

Use the filters at the top of the page to filter the cases that display. Once you make your selections, click the **Filter** button.

The **Case List** displays information including the **Case Number**, **Status**, **Open Date**, **Closed Date**, equipment details, and customer information.

Click the **Case #** link to see all of the case details. From the Case Detail window, you can attach **Alerts, Files, Related Data**, and other **Notes**.

Case Detail For 100405

Case 100405 Status: Pending Owner: demouser1 Demo Assigned To: Joey Glenn
 Created By: demouser1 Demo Created On: Aug 24, 2018 Last Changed By: demouser1 Demo Last Changed On: Aug 24, 2018

Equipment
 Manufacturer: CATERPILLAR
 Serial No: 0ADF45538 Year: 2016 Model: 980M
 Family: WHEEL LOADER

Customer
 Customer Number: 1012450 Division: PGGG
 Customer Name: JVS CONTRACTOR LTD
 City: Rhodes

Compartments
 Transmission

Description:
TEST

Recommendation:
TEST

Risk If Action Not Taken:
TEST

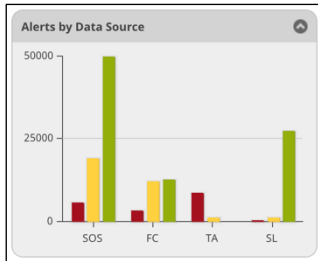
Lead No 162260 Close Case Edit

Ref No	Type	Compartment	Description	Action
178385001	SOS	Transmission	THE ANALYSIS OF THE OIL SAMPLE TAKEN F...	[Icon]

File Attachments
No Data Found.

Click on a serial number to view detailed information on that equipment. See the EquipmentLink section for more details.

Alerts by Data Source

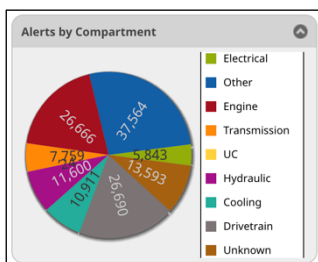


There are four sources of alerts in **CM Portal**:

- Scheduled Oil Sampling (SOS)
- Fault Codes (FC)
- Technical Analysis from inspections (TA)
- Service Letters (SL)

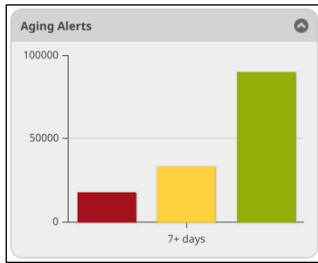
The **Alerts by Data Source** chart lets you see where the alerts in your equipment originated.

Alerts by Compartment



Alerts by Compartment displays the location of alerts in your equipment. Alerts that do not fall into a single compartment, or that may not have been mapped appropriately, have been assigned to *Other*.

Aging Alerts



Aging Alerts displays all alerts that have not been reviewed in at least seven days since they occurred.

Equipment Group Table

The table at the bottom of the dashboard displays alerts by equipment group.

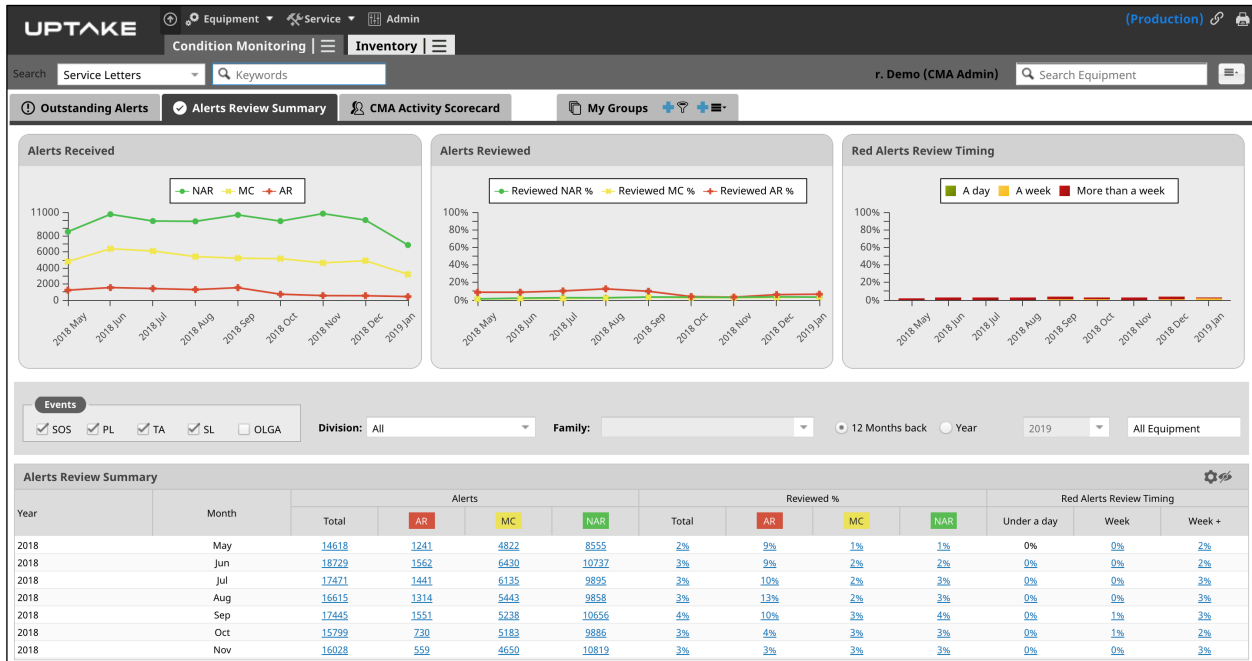
Equipment Group	# Total Unit	# Alert Unit	Total	Engine	Coolant	Transmission	Drive Train	Hydraulics
= Monitored Equipment Groups								
ABC CONSTRUCTION ↓	3	0						
Advanced Disposal -Western Berks ↓	3	2	1	7	1	3	2	1
ANDERSON CONSTRUCTION ↓	2	0						
BERG CONSTRUCTION ↓	13	2	6	1		1	2	1
Burlington County ↓	2	1	1					

Equipment is grouped according to the following:

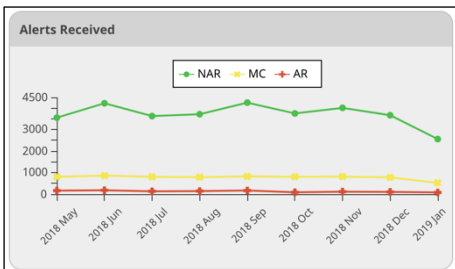
- **Known Equipment** – Equipment with information in DBS
 - *Equipment in Machine Population*
 - *Not Monitored*
- **Unknown Equipment** – Equipment without information in DBS
 - *Equipment in Machine Population*
 - *Not Monitored*
- **EMT** – Equipment monitored under various agreements in Uptake’s EMT (Equipment Monitoring Toolkit) application.
 - *CSA Equipment*
 - *Rental Fleet*
 - *Custom Subscription*

Alerts Review Summary

The **Alerts Review Summary** (also accessible by clicking the tab at the top of the page) displays the trends of alerts over a selected time range. Alerts are plotted separately by status (AR, MC, and NAR).

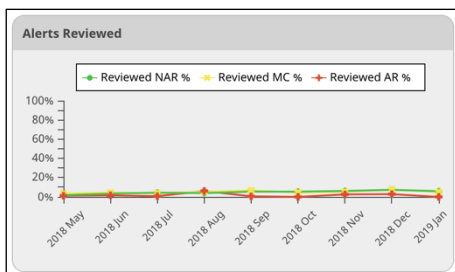


Alerts Received



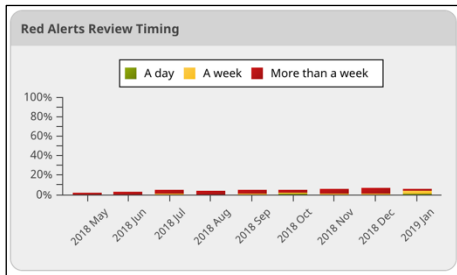
The **Alerts Received** chart displays the number of alerts of each status received over the selected time range.

Alerts Reviewed



The **Alerts Reviewed** chart displays the percentage of alerts of each status reviewed over the selected time range.

Red Alerts Review Timing



The **Red Alerts Review Timing** chart displays the percentage of red alerts taking more than a specified amount of time to review.

- **Green** – Reviewed within one day
- **Yellow** – Reviewed within one week
- **Red** – Reviewed after one week

Alerts Review Summary

The **Alerts Review Summary** table combines the three charts (**Alerts Received**, **Alerts Reviewed**, and **Red Alerts Review Timing**) into one table.





Year	Month	Alerts				Reviewed %				Red Alerts Review Timing		
		Total	AR	MC	NAR	Total	AR	MC	NAR	Under a day	Week	Week +
2018	Jul	4572	136	807	3629	4%	1%	4%	4%	0%	1%	4%
2018	Aug	4655	147	792	3716	4%	4%	5%	4%	0%	0%	4%
2018	Sep	5256	170	831	4255	5%	1%	7%	5%	0%	1%	4%
2018	Oct	4651	90	809	3752	5%	0%	5%	5%	1%	1%	3%
2018	Nov	4949	117	820	4012	6%	3%	5%	6%	0%	1%	5%
2018	Dec	4556	106	781	3669	7%	3%	8%	7%	0%	1%	6%
2019	Jan	3169	81	526	2562	6%	0%	5%	6%	1%	3%	2%

Click on an alert number in the **Alerts Review Summary** to navigate to the **Alerts** table and view details about those alerts.




Serial No	Make	Model	Make Desc	Customer No	Customer Na.	Division	Product Code	Service Meter	Compartment	Type	Ref No	Date	Description	Status
0YU93432	AA	836K	CATERPILLAR	1364650	NMZ WELL D...	PGGG	E	7047 H	Engine			Jul 30 2018	No Action Re...	
0YY145538	AA	336E	CATERPILLAR	1092726	HSZ CONTRA...	PGGG	F	7246 H	Electrical			Jul 30 2018	Monitor Co...	
0QKF93432	AA	938K	CATERPILLAR	1837885	IFW MECHAN...	PGGG	D	6038 H	Electrical			Jul 30 2018	Monitor Co...	
0UDP45538	AA	962K	CATERPILLAR	1726750	ZFV CONSTR...	PGGG	D	12861 H	Engine			Jul 30 2018	No Action Re...	
0UDP45538	AA	962K	CATERPILLAR	1726750	ZFV CONSTR...	PGGG	D	12861 H	Engine			Jul 30 2018	No Action Re...	
0XUB58265	AA	D6TLGP	CATERPILLAR	1848525	LUN MECHA...	PGGG	A	5319 H	Engine			Jul 30 2018	Monitor Co...	
0XUB58265	AA	D6TLGP	CATERPILLAR	1848525	LUN MECHA...	PGGG	A	5319 H	Engine			Jul 30 2018	No Action Re...	
0QLD45538	AA	950K	CATERPILLAR	1582800	TKU EXCAVA...	PGGG	D	7127 H	Engine			Jul 30 2018	No Action Re...	
0UJFN72225	AA	420DII	CATERPILLAR	1746650	YIL MECHAN...	PGGG	X	10566 H	Other			Jul 30 2018	Action Requi...	
0UJFN72225	AA	420DII	CATERPILLAR	1746650	YIL MECHAN...	PGGG	X	10566 H	Other			Jul 30 2018	Action Requi...	
0UJFN72225	AA	420DII	CATERPILLAR	1746650	YIL MECHAN...	PGGG	X	10566 H	Other			Jul 30 2018	Action Requi...	
0UJFN72225	AA	420DII	CATERPILLAR	1746650	YIL MECHAN...	PGGG	X	10566 H	Other			Jul 30 2018	Action Requi...	
0BDW72225	AA	938F	CATERPILLAR	1042400	PJV CONSTR...	PGGG	D	12741 H	Other			Jul 30 2018	Action Requi...	
0BDW72225	AA	938F	CATERPILLAR	1042400	PJV CONSTR...	PGGG	D	12741 H	Other			Jul 30 2018	Action Requi...	
0DIL43556	AA	980M	CATERPILLAR	1189400	EAU EXCAVA...	PGGG	D	6642 H	Hydraulic			Jul 30 2018	No Action Re...	
0KEM58265	AA	D6TLGPT4F	CATERPILLAR	1134155	ETV WELL DR...	PGGG	A	3046 H	Hydraulic			Jul 30 2018	Monitor Co...	
0VB920218	AA	D6TLGP	CATERPILLAR	1848525	LUN MECHA...	PGGG	A	7436 H	Engine			Jul 30 2018	No Action Re...	
0VB920218	AA	D6TLGP	CATERPILLAR	1848525	LUN MECHA...	PGGG	A	7436 H	Engine			Jul 30 2018	Monitor Co...	
0UGH26272	AA	AP1055F	CATERPILLAR	1244305	BIS WELL DR...	PGGG	Q	2090 H	Unknown			Jul 30 2018	Monitor Co...	
0UGH26272	AA	AP1055F	CATERPILLAR	1244305	BIS WELL DR...	PGGG	Q	2090 H	Unknown			Jul 30 2018	Monitor Co...	

The **Alerts** table displays information about the equipment in which the alert occurred including serial number, make, model, customer information, type, description, and status.

The icons in the **Type** column represent the following

-  (flask) – Oil Samples
-  (page) – Inspections
-  (antenna) – Electronic Data
-  (envelope) – Service Letters

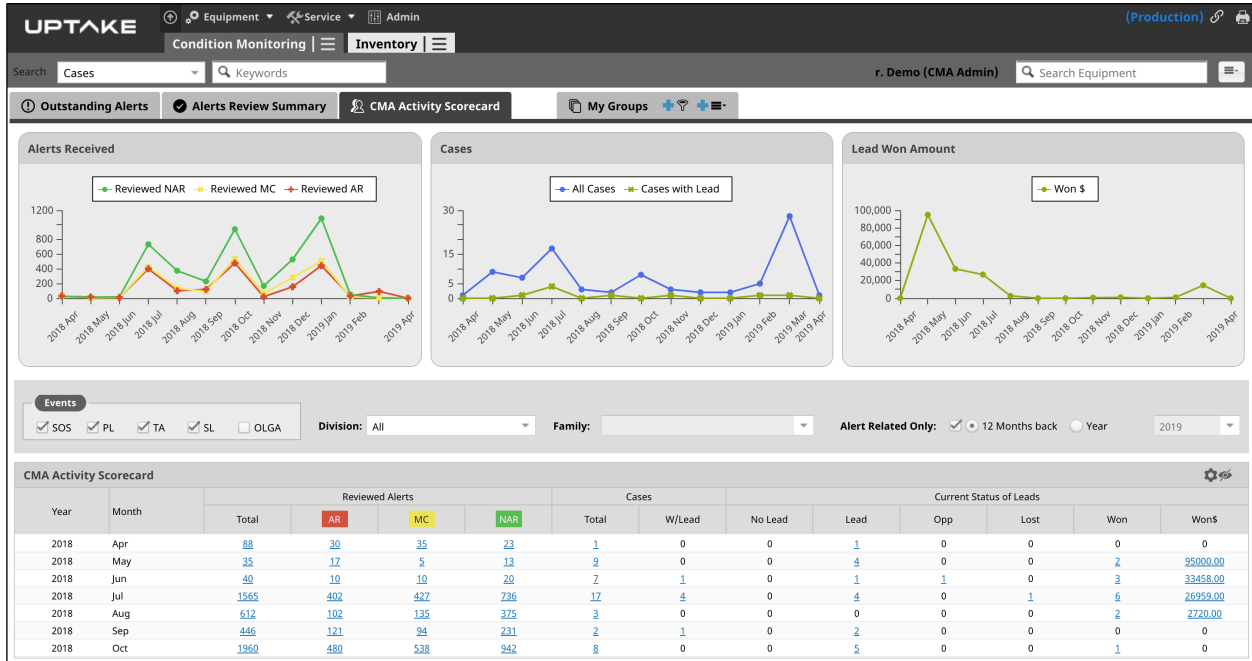
The icons in the **Status** column represent the following:

-  (speaker with a slash) – Silenced
-  (hourglass) – Outstanding
-  (checkmark) – Reviewed

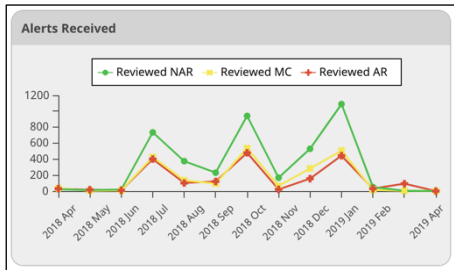
Click on a serial number to view detailed information on that equipment. See the EquipmentLink section for more details.

CMA Activity Scorecard

The **CMA Activity Scorecard** (also accessible by clicking the tab at the top of the page) helps you analyze overall monthly CMA performance.

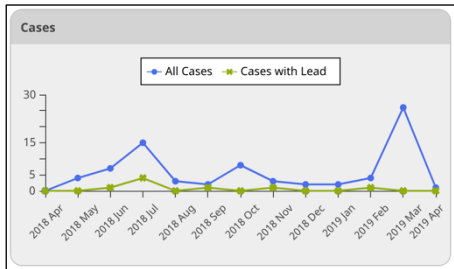


Alerts Reviewed



The **Alerts Reviewed** chart displays the number of alerts of each type that were reviewed each month, for the selected time range.

Cases



The **Cases** chart displays the number of total **Cases**, as well as just the **Cases with Leads**, handled each month, for the selected time range.

Lead Won Amount



The **Lead Won Amount** chart displays the dollar amount of the lead won each month, for the selected time range.

CMA Activity Scorecard

The **CMA Activity Scorecard** table combines the first two charts (**Alerts Reviewed** and **Cases**) into one table, along with more detailed information on the status of the leads in the cases.

CMA Activity Scorecard													
Year	Month	Reviewed Alerts				Cases			Current Status of Leads				
		Total	AR	MC	NAR	Total	W/Lead	No Lead	Lead	Opp	Lost	Won	Won\$
2018	Apr	88	30	35	23	0	0	0	0	0	0	0	0
2018	May	35	17	5	13	4	0	0	2	0	0	2	95000.00
2018	Jun	40	10	10	20	2	1	0	1	1	0	3	33458.00
2018	Jul	1565	402	427	736	15	4	0	3	0	1	6	26959.00
2018	Aug	612	102	135	375	3	0	0	0	0	0	2	2720.00
2018	Sep	446	121	94	231	2	1	0	2	0	0	0	0
2018	Oct	1950	480	538	942	8	0	0	5	0	0	1	0

Click on an alert number in the **CMA Activity Scorecard** table to navigate to the **Alerts** table and view details about those alerts.

Alerts														
Serial No	Make	Model	Make Desc	Customer No	Customer Na...	Division	Product Code	Service Meter	Compartment	Type	Ref No	Date	Description	Status
OPRA93432	AA	D6N1GP	CATERPILLAR	HEAVEN	NFB CONSTR...	PGGG	A	2514 H	Hydraulic	▲		May 13 2018	No Action Re...	✓
OPRA93432	AA	D6N1GP	CATERPILLAR	HEAVEN	NFB CONSTR...	PGGG	A	2514 H	Cooling	▲		May 13 2018	No Action Re...	✓
OEM45538	AA	M318	CATERPILLAR	1042400	PJV CONSTR...	PGGG	R	8239 H	Other	▶		May 13 2018	Action Requi...	✓
OEM45538	AA	M318	CATERPILLAR	1042400	PJV CONSTR...	PGGG	R	8239 H	Other	▶		May 13 2018	Action Requi...	✓
OEM45538	AA	M318	CATERPILLAR	1042400	PJV CONSTR...	PGGG	R	8239 H	Other	▶		May 13 2018	Action Requi...	✓
OPRA93432	AA	D6N1GP	CATERPILLAR	HEAVEN	NFB CONSTR...	PGGG	A	2514 H	Other	▶		May 11 2018	Action Requi...	✓
OPRA93432	AA	D6N1GP	CATERPILLAR	HEAVEN	NFB CONSTR...	PGGG	A	2514 H	Other	▶		May 11 2018	Action Requi...	✓
OPRA93432	AA	D6N1GP	CATERPILLAR	HEAVEN	NFB CONSTR...	PGGG	A	2514 H	Other	▶		May 11 2018	Action Requi...	✓

Click on a case number in the **CMA Activity Scorecard** table to navigate to the **Case List** table and view details about those cases.

Case List										
Case #	Status	Open Date	Closed Date	Assigned To	Owned By	Make	Serial No	Customer No	Name	Description
100376	Active	Jun 03 2018			demouser2 Demo	AA	0WIK45538	1023150	UKT CONTRACTOR LTD	Persistent Steering Issues affecting per...
100382	Active	Jun 30 2018			demouser2 Demo	AA	0XMY93432	1042400	PJV CONSTRUCTION INC	dkdkd
100377	Active	Jun 11 2018			demouser2 Demo	AA	0OKN72225	1366350	GZB MECHANICAL SERVICES INC	Repair required
100378	Closed	Jun 15 2018	Jun 18 2018		demouser2 Demo	AA	0OKN72225	1366350	GZB MECHANICAL SERVICES INC	high temperature of engine
100380	Closed	Jun 18 2018	Jun 21 2018		demouser2 Demo	AA	0WGO20648	1573458	OOA EXCAVATING & UNDERGROUND	Check Gear indicator,dkf
100381	Active	Jun 21 2018			demouser2 Demo	AA	0WGO20648	1573458	OOA EXCAVATING & UNDERGROUND	A significant amount of alerts for overh...
100379	Active	Jun 16 2018			demouser2 Demo	AA	0VBRK93489	1848525	LUN MECHANICAL SERVICES INC	Multiple alerts affecting machine

Click on a number in the **Current Status of Leads** section of the **CMA Activity Scorecard** to navigate to the **Opportunities** table and view details about those opportunities.

CMA Opportunity							
Opp	Stage	Status	Description	Revenue	Customer	Serial Number	Manufacturer
162209	Opportunities - ...	Active	ttt	1,100	1093850	0A0V45538	CATERPILLAR
162237	Opportunities - ...	Active	Fix this machine	20,874	1203250	0MNF33889	CATERPILLAR
162201	Opportunities - ...	Active		120	1337300	0MNF33885	CATERPILLAR
162208	Opportunities - ...	Closed		2,000	1012450	0ADF45538	CATERPILLAR
162220	Opportunities - ...	Closed		770	1042400	0G0P58265	CATERPILLAR
162235	Opportunities - ...	Pending	emission problems	2,095	1848525	0ALC33385	CATERPILLAR

My Cases

The **My Cases** page displays your **Case List** in the same format as the **Cases Summary** in the **CMA Dashboard** section.

The screenshot shows the UPTAKE interface for the 'My Cases' page. At the top, there are navigation tabs for 'Condition Monitoring' and 'Inventory'. Below these are search and filter options. The filter section includes dropdowns for 'Division' (All), 'Family', and 'Date Search' (Open Date). There are also checkboxes for 'Status' (Active, Pending, Closed with Lead, Closed without Lead) and 'Event Type' (SOS, PL, TA, SL, OLGA, Alert Related Only). A 'Filter' button is located at the bottom right of the filter section. Below the filters is the 'Case List' table.

Case #	Status	Open Date	Closed Date	Assigned To	Owned By	Make	Serial No	Customer No	Name	Description
100452	Active	Mar 28 2019			demouser1 Demo	AA	0QLB84367	1002325	FPD CONTRACTOR LTD	Fix it
100385	Closed	Jul 12 2018	Jul 18 2018		demouser1 Demo	AA	0ADF45538	1012450	JVS CONTRACTOR LTD	
100405	Pending	Aug 24 2018		Joey Glenn	demouser1 Demo	AA	0ADF45538	1012450	JVS CONTRACTOR LTD	TEST
100446	Active	Mar 26 2019			demouser1 Demo	AA	0BEF43556	1023150	UKT CONTRACTOR LTD	Engine seems to be overheating - show...
100447	Active	Mar 27 2019			demouser1 Demo	AA	0IKP33489	1023150	UKT CONTRACTOR LTD	this is a test

Use the filters at the top of the page to filter the cases that display. Once you make your selections, click the **Filter** button.

The **Case List** displays information including the **Case Number**, **Status**, **Open Date**, **Closed Date**, equipment details, and customer information.


Groups

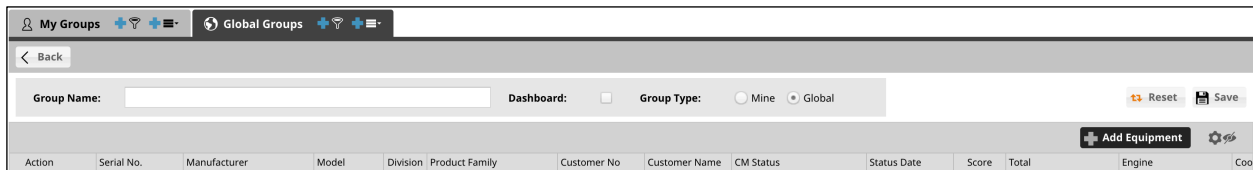
The **Groups** page lets you create equipment groups to monitor. **Global Groups** are seen and editable by everyone. **My Groups** are only editable by you.

The screenshot shows the UPTAKE interface for the 'Global Groups' page. It features a navigation bar with 'My Groups' and 'Global Groups' tabs. Below the tabs is a table listing various groups. The table has columns for 'Name', 'Changed By', and 'Changed On'. Each row represents a different group, such as 'ABC CONSTRUCTION' or 'Advanced Disposal -Western Berks', with the user who last modified it and the date of modification.

Name	Changed By	Changed On
ABC CONSTRUCTION	demouser1 Demo	May 17, 2019
Advanced Disposal -Western Berks	Aileen Villarreal	Jul 16, 2018
ANDERSON CONSTRUCTION	Aileen Villarreal	Sep 22, 2018
BERG CONSTRUCTION	Aileen Villarreal	Jan 20, 2019
Burlington County	Charmaine Mc ...	Jan 20, 2019
Dyer Quarry	Aileen Villarreal	Sep 22, 2018
Earl Township	Charmaine Mc ...	Jan 20, 2019
FIDELITY CONTRACTING	Aileen Villarreal	Jan 20, 2019
G00F330 Heavy Rental Equipment	Griselda Tran	Aug 15, 2017
Gourmet's Delight Mushroom	Aileen Villarreal	Oct 15, 2018
H.E.R./Corrado	Charmaine Mc ...	Jan 19, 2019

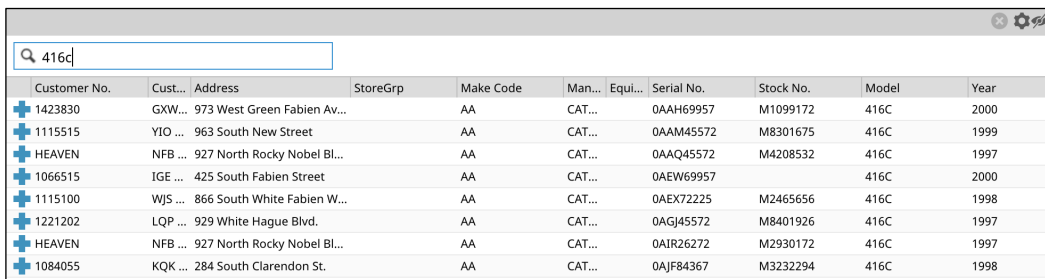
To create a new group in either **My Groups** or **Global Groups**:

1. Click the **+ Menu**  icon.
2. Enter a **Group Name**.
3. Select if the group should be included in the **CMA Dashboard** summary.
4. Select the **Group Type**.
5. Click **[Save]**.




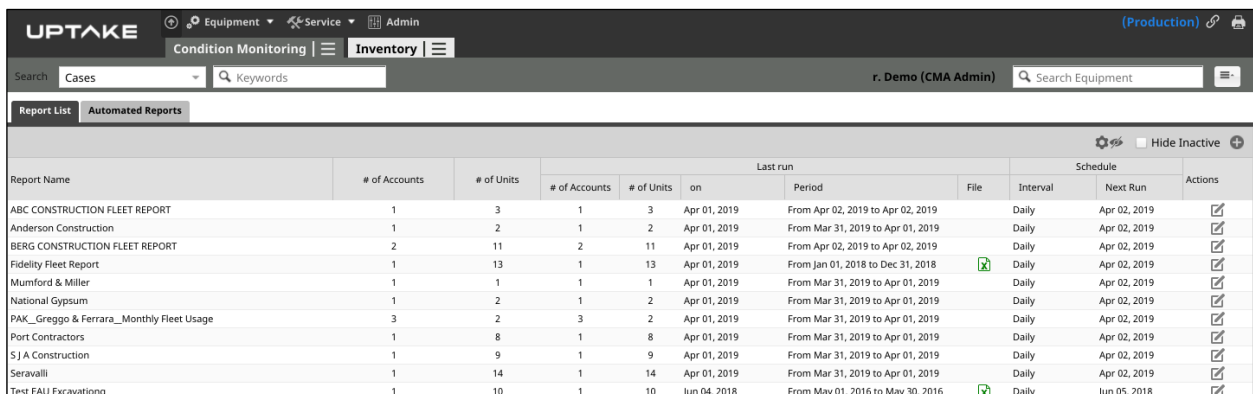
To add equipment to a group:


1. Click the **+ Add Equipment** button when viewing the group.
2. Enter your search criteria for the equipment you want to add.
3. Click the **Add +** icon for each piece of equipment you want to add.
4. Click the **X** icon to close the window.
5. Click **[Save]**.



Fleet Reports


The **Fleet Reports** page houses reports that have been created to be sent to customers. To download an Excel version of a report, click the **File**  icon in the **File** column of the desired report, if available.





To create a new report, click the **Add**  icon. Enter all desired information for your report.

Reports can be emailed to your customers, and you can choose which sections and which equipment you want to include.

Once you complete the **Customers**, **Schedule**, **Customer Email List**, **Internal Email List**, **Report Sections**, and **Equipment** sections, click **[Save]** at the top of the screen.

You can view an existing report by clicking on the **Edit**  icon in the **Actions** column. This will display the **Report Configuration** tab.

Once all desired changes have been made, click **[Save]**. To generate or email the report manually, click the **Generate** button.

The **History** tab displays a running history for the current report. Click the **File**  icon to download a specific instance of a report. Click the **Envelope**  icon to email a specific instance of a report.

Report Name	Type	Gen. By	Report Gen. Date	Review Required	Reviewed By	Date	Emailed	Last Emailed By	Last Email date	Emailed #	File
Anderson Construction	Manual	Samantha687	Aug 10, 2016	1						0	 
Anderson Construction	Manual	Samantha687	Aug 10, 2016	1						0	 
Anderson Construction	Manual	Chester361	May 11, 2017	1						0	 
Anderson Construction	Automatic		Oct 18, 2018	1						0	
Anderson Construction	Automatic		Oct 19, 2018	1						0	
Anderson Construction	Automatic		Oct 20, 2018	1						0	

CMP Admin

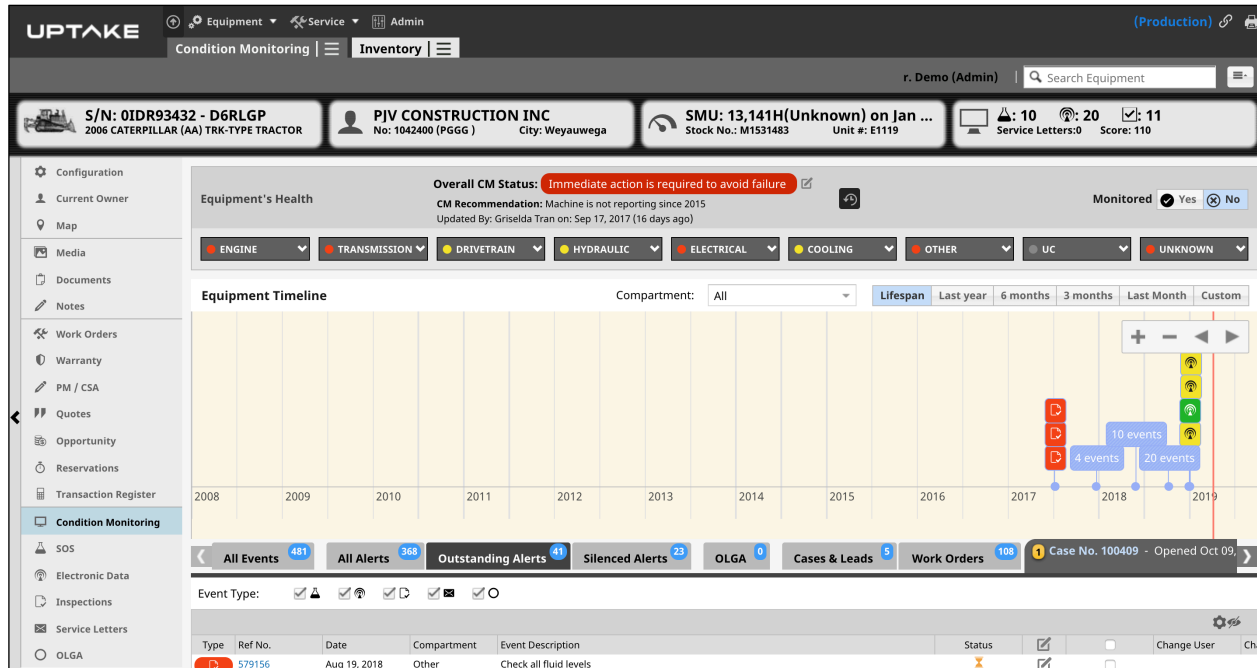
The **CMP Admin** page allows a CMP Administrator to apply specific sorting for alerts by compartment, map components to compartments, and complete other administrative tasks.

The screenshot displays the UPTAKE CMP Admin interface. The top navigation bar includes 'UPTAKE', 'Equipment', 'Service', and 'Admin' menus, along with a '(Production)' status indicator. Below the navigation, there are search fields for 'Cases' and 'Keywords', and a 'Search Equipment' field. The main content area is titled 'CMP Compartments' and features a 'Mapping' section on the left with a list of component categories and their corresponding SOS and FC values.

Compartment		Active	Last ...	Last ...	SOS			FC			
English	Spanish				AR	MC	NAR	AR	MC	NAR	AR
Unknown	Unknown	<input checked="" type="checkbox"/>			10	5	0	10	5	0	10
Engine	Engine	<input checked="" type="checkbox"/>	Feb ...		10	5	0	10	5	0	10
Cooling	Cooling	<input checked="" type="checkbox"/>	Feb ...		10	5	0	10	5	0	10
Transmission	Transmission	<input checked="" type="checkbox"/>	Feb ...		10	5	0	10	5	0	10
Drivetrain	Drivetrain	<input checked="" type="checkbox"/>	Feb ...		10	5	0	10	5	0	10
Hydraulic	Hydraulic	<input checked="" type="checkbox"/>	Feb ...		10	5	0	10	5	0	10
Electrical	Electrical	<input checked="" type="checkbox"/>	Feb ...		10	5	0	10	5	0	10
Other	Other	<input checked="" type="checkbox"/>	Feb ...		10	5	0	10	5	0	10
UC	UC	<input checked="" type="checkbox"/>			10	5	0	10	5	0	10

EQUIPMENTLINK

While EquipmentLink is not a stand-alone feature of CM Portal, it is at the heart of the application. Each time you click on a serial number, you are taken to EquipmentLink. This section gives you access to all of the data that informs the health and history of a piece of equipment.



Condition Monitoring

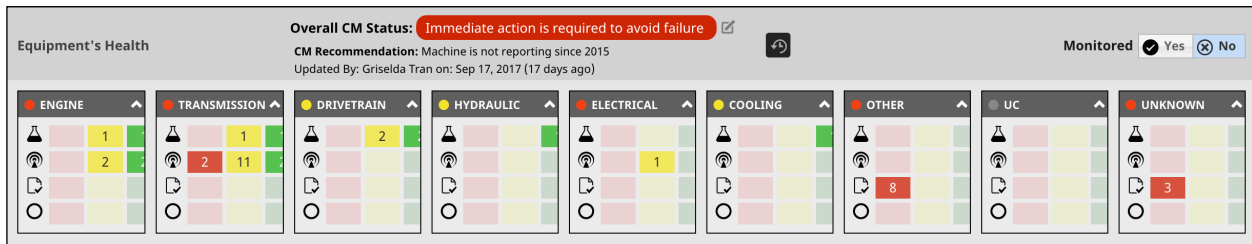
The EquipmentLink **Condition Monitoring** page displays equipment health by compartment, outstanding alerts, and event and alert history.

The top of the page displays basic equipment information including serial number, division, family, customer name, alerts, and score. The score is calculated based on the assignments made in the **CMP Admin** pages, where points are allotted for every event type, compartment, and alert.

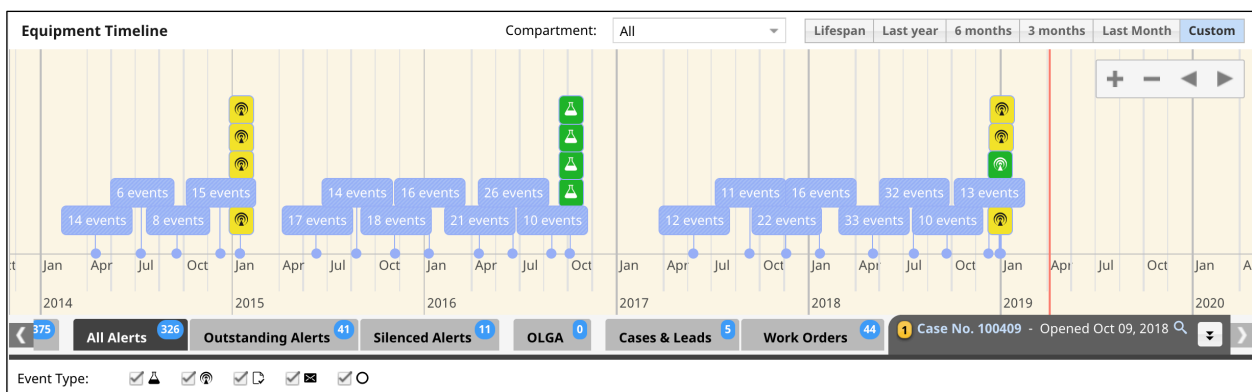


Click the **Edit**  icon in the **Equipment Health** section to update the **CM Status** or **CM Recommendation**.

This section also displays the location of alerts by compartment.



The **Equipment Timeline** displays events and alerts along a graph. You can zoom in or out, move forward or backward, plot only certain events, alerts, or reports, and change the viewable timespan. Click an item in the timeline and it will be highlighted in table below the timeline.



On the **Equipment Timeline**, icons display representing the associated event types:

- 🧪 (flask) – Oil Samples
- 📄 (page) – Inspections
- 📡 (antenna) – Electronic Data
- ✉️ (envelope) – Service Letters
- ○ (empty circle) – OLGA
- 🛠️ (tools) – Work Orders
- 📁 (briefcase) – Cases
- 💰 (dollar sign) – Leads

Click the tabs below the timeline to filter for desired events. Click the **Case** tab to display cases in a menu.



The table below the timeline displays the same items shown in the timeline, but in a sortable grid and with more details.

Event Type:

Type	Ref No.	Date	Compartment	Event Description	Status	Change User	Change Date
	579156	Aug 19, 2018	Other	(GR) Check Antifreeze protection level -ELC: Adjust as recommended		demouser1 Demo	Feb 05, 2019
	579156	Aug 19, 2018	Other	Check all fluid levels			
	579156	Aug 19, 2018	Other	Sample all oil compartments		demouser1 Demo	Oct 06, 2019
	579156	Aug 19, 2018	Other	Change Hydraulic System/Transmission Oil			
	519402	Aug 18, 2018	Transmission	CID:299 FMI:8 Transmission Lever Position Sensor : Abnormal frequency, pulse width, or period			
	504066	May 30, 2018	Other	Sample all oil compartments			
	504066	May 30, 2018	Other	(GR) Check Antifreeze protection level -ELC: Adjust as recommended			
	504066	May 30, 2018	Other	Check all fluid levels			
	455896	Mar 10, 2018	Transmission	CID:299 FMI:8 Transmission Lever Position Sensor : Abnormal frequency, pulse width, or period			

Showing 368 of 368 events

SOS

The SOS section displays all SOS results for the equipment.

UPTAKE Equipment Service Admin (Production)

Condition Monitoring | **Inventory** | r. Demo (Admin) |

S/N: 01DR93432 - D6RLGP
2006 CATERPILLAR (AA) TRK-TYPE TRACTOR

PJV CONSTRUCTION INC
No: 1042400 (PGGG) City: Weyauwega

SMU: 13,141H(Unknown) on Jan ...
Stock No.: M1531483 Unit #: E1119

10 **20** **11**
Service Letters:0 Score: 110

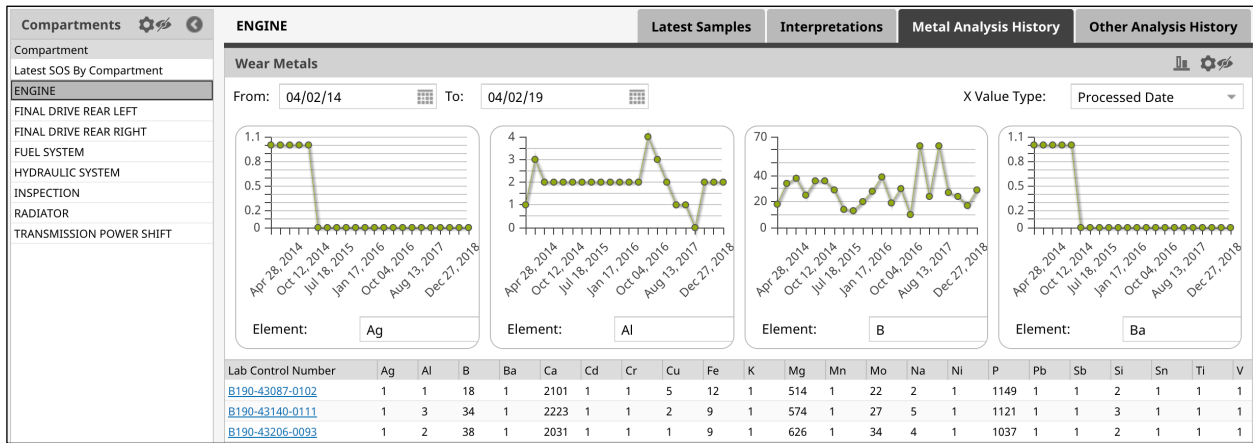
- Configuration
- Current Owner
- Map
- Media
- Documents
- Notes
- Work Orders
- Warranty
- PM / CSA
- Quotes
- Opportunity
- Reservations
- Transaction Register
- Condition Monitoring
- SOS**
- Electronic Data
- Inspections
- Service Letters
- OLGA

Compartments

Latest SOS by Compartment

Compartment	Customer	Lab Control Number	Processed Date	Overall Interpretation	Interpretation
HYDRAULIC SYSTEM	VJR PAVING	B190-47331-0022	Dec 27, 2018	No Action Required	RESULTS OF LATEST SAMPL...
RADIATOR	VJR PAVING	B190-47331-1010	Dec 27, 2018	No Action Required	ALL LEVEL 1 TESTS ARE WIT...
FINAL DRIVE REAR RIGHT	VJR PAVING	B190-47331-0020	Dec 27, 2018	No Action Required	RESULTS OF LATEST SAMPL...
FINAL DRIVE REAR LEFT	VJR PAVING	B190-47331-0021	Dec 27, 2018	No Action Required	RESULTS OF LATEST SAMPL...
TRANSMISSION POWER SHIFT	VJR PAVING	B190-47331-0019	Dec 27, 2018	No Action Required	THE PARTICLE COUNT IS HL...
HYDRAULIC SYSTEM	ENGINE	B190-47331-0018	Dec 27, 2018	No Action Required	RESULTS OF LATEST SAMPL...
INSPECTION	FUEL SYSTEM	B190-46153-3002	Jul 01, 2017	No Action Required	ISO Code = 17/13. (CAT Rec...
RADIATOR	INSPECTION	B190-44282-5006	Nov 09, 2015	No Action Required	Brake accumulator bracket ...
TRANSMISSION POWER SHIFT					

Click into specific compartments to view the latest sample results, with interpretations and analysis histories.



Electronic Data

The **Electronic Data** section displays all electronic data for the equipment. Use the **Message Type** menu to filter for either messages by type.

The screenshot shows the 'Electronic Data' section of the UPTAKE Condition Monitoring portal. It displays a list of messages with columns for ID, Message Type, Level, Occur. Count, Module, Fault Code, Fault Description, Event Date, and Customer. The messages are filtered by 'All' message types.

ID	Message Type	Level	Occur. Count	Module	Fault Code	Fault Description	Event Date	Customer
579148	Diagnostic	Level 2	3	Caterpillar Moni...	CID:248 FMI:2	CAT Data Link : Data erratic, intermittent or incorrect	Jan 01, 2019 07:22 P.M.	1042400
579149	Diagnostic	Level 2	1	Track Type Tract...	CID:874 FMI:4	Mode Select Switch : Voltage below normal	Dec 31, 2018 10:22 P.M.	1042400
578547	Diagnostic	Level 1	2	Track Type Tract...	CID:588 FMI:9	Monitoring System Display : Abnormal update rate	Dec 29, 2018 07:48 P.M.	1042400
578545	Diagnostic	Level 2	1	Caterpillar Moni...	CID:248 FMI:2	CAT Data Link : Data erratic, intermittent or incorrect	Dec 29, 2018 07:47 P.M.	1042400
578546	Diagnostic	Level 2	1	Track Type Tract...	CID:247 FMI:9	SAE J1939 Data Link : Abnormal update rate	Dec 29, 2018 07:31 P.M.	1042400
575602	Event	Level 2	1	Engine Control #1	EID:198	Low Fuel Pressure	Dec 22, 2018 04:22 P.M.	1042400
575589	Event	Level 1	1	Engine Control #1	EID:198	Low Fuel Pressure	Dec 22, 2018 04:21 P.M.	1042400
559601	Event	Level 1	4	Engine Control #1	EID:172	High Air Filter Restriction	Nov 18, 2018 10:47 A.M.	1042400
558625	Event	Level 1	2	Engine Control #1	EID:172	High Air Filter Restriction	Nov 16, 2018 02:18 P.M.	1042400
544118	Event	Level 1	5	Engine Control #1	EID:198	Low Fuel Pressure	Oct 14, 2018 06:43 A.M.	1042400
537823	Event	Level 1	1	Engine Control #1	EID:198	Low Fuel Pressure	Sep 30, 2018 06:30 A.M.	1042400
519402	Diagnostic	Level 3	1	Track Type Tract...	CID:299 FMI:8	Transmission Lever Position Sensor : Abnormal freque...	Aug 18, 2018 02:19 P.M.	1042400
519196	Diagnostic	Level 2	1	Track Type Tract...	CID:875 FMI:3	Manual Select Switch : Voltage above normal	Aug 18, 2018 10:08 A.M.	1042400
518932	Event	Level 1	4	Engine Control #1	EID:198	Low Fuel Pressure	Aug 17, 2018 08:40 P.M.	1042400
514965	Event	Level 1	1	Engine Control #1	EID:172	High Air Filter Restriction	Aug 10, 2018 07:41 A.M.	1042400
507497	Diagnostic	Level 2	1	Engine Control #1	CID:296 FMI:9	Transmission Control : Abnormal update rate	Jul 21, 2018 09:00 A.M.	1042400
507496	Diagnostic	Level 2	1	Engine Control #1	CID:296 FMI:9	Transmission Control : Abnormal update rate	Jul 21, 2018 08:41 A.M.	1042400
507495	Diagnostic	Level 2	1	Engine Control #1	CID:296 FMI:9	Transmission Control : Abnormal update rate	Jul 21, 2018 08:25 A.M.	1042400
507054	Diagnostic	Level 1	2	Track Type Tract...	CID:588 FMI:9	Monitoring System Display : Data erratic, intermittent ...	Jul 20, 2018 01:19 P.M.	1042400
506953	Diagnostic	Level 2	14	Track Type Tract...	CID:1078 FMI:3	Blade Control Handle Lift Position Sensor : Voltage abo...	Jul 20, 2018 11:25 A.M.	1042400
506954	Diagnostic	Level 2	15	Track Type Tract...	CID:1079 FMI:3	Blade Control Handle Tilt Position Sensor : Voltage abo...	Jul 20, 2018 11:25 A.M.	1042400
506922	Diagnostic	Level 2	1	Track Type Tract...	CID:1078 FMI:4	Blade Control Handle Lift Position Sensor : Voltage bel...	Jul 20, 2018 10:16 A.M.	1042400
506745	Diagnostic	Level 2	1	Track Type Tract...	CID:1078 FMI:3	Blade Control Handle Lift Position Sensor : Voltage abo...	Jul 20, 2018 06:52 A.M.	1042400

Inspections

The **Inspections** section lists the history of inspections for the equipment. Click an inspection to view the inspection details.

Inspection Date	Customer Name	Customer No	Inspection Type	Evaluation	Inspector	Source
May 12, 2017	PJV CONSTRUCTION INC	1042400	PM Checklist	3 4	Chuck Snyder	CatInspection
Jul 06, 2017	PJV CONSTRUCTION INC	1042400	PM Checklist	3 4	Chuck Snyder	CatInspection
Oct 12, 2017	PJV CONSTRUCTION INC	1042400	PM Checklist	3 5	Troy Cronce	CatInspection
Jan 22, 2018	PJV CONSTRUCTION INC	1042400	PM Checklist	4 3	Daniel Roberts	CatInspection
May 30, 2018	PJV CONSTRUCTION INC	1042400	PM Checklist	3 4	Daniel Roberts	CatInspection
Aug 19, 2018	PJV CONSTRUCTION INC	1042400	PM Checklist	4 5	Daniel Roberts	CatInspection
Oct 19, 2018	PJV CONSTRUCTION INC	1042400	PM Checklist		Kyle Rost	CatInspection
Dec 27, 2018	PJV CONSTRUCTION INC	1042400	PM Checklist		Kyle Rost	CatInspection

To submit a new inspection, click the **New Inspection Form** button, and complete all the necessary fields.

New Inspection Form

Customer: * [Field] Search
 Inspection No.: * [Field]
 Year Of Manufacture: [Field]
 Manufacturer: [Dropdown]
 Created Date: * [Calendar]
 Last Modified: [Calendar]
 Originated by: [Field]
 Inspector: [Field]
 Reviewer: [Field]
 Sales Rep: [Field]
 Branch: * [Dropdown]
 Asking Price: [Field]

Serial No.: * [Field] Search
 Model: [Field]
 Division: * [Dropdown]
 Family: [Dropdown]
 Engine Serial #: [Field]
 Transmission Serial #: [Field]
 SMU: [Field]
 Last Scheduled Oil Sample: [Calendar]
 Last CTS Inspection: [Calendar]
 Last Preventative Maintenance: [Calendar]
 Final Price: [Field]
 Reviewed:

Evaluation Level

Engine: NAR MC AR
 Cooling: NAR MC AR
 Transmission: NAR MC AR
 Drivetrain: NAR MC AR
 Hydraulic: NAR MC AR
 Electrical: NAR MC AR
 Other: NAR MC AR
 UC: NAR MC AR

Recommendation: [Text Area]

Service Letters

The **Service Letters** section houses all *Outstanding*, *Completed*, and *Expired* service letter for the equipment. Click on a **PIP Number** to view the service letter details.

The screenshot shows the Uptake interface for the 'Service Letters' section. The top navigation bar includes 'UPTAKE', 'Equipment', 'Service', and 'Admin'. The main header displays 'Condition Monitoring | Inventory |' and 'r. Demo (Admin) | Search Equipment'. Below this, a summary bar shows equipment details: S/N: 01DR93432 - D6RLGP (2006 CATERPILLAR (AA) TRK-TYPE TRACTOR), PJV CONSTRUCTION INC (No: 1042400 (PGGG), City: Weyauwega), and SMU: 13,141H(Unknown) on Jan ... (Stock No.: M1531483, Unit #: E1119). Summary statistics show 10 Alerts, 20 SOS, and 11 Service Letters with a score of 110.

The main content area is divided into two sections:

- OUTSTANDING SERVICE LETTERS:** A table with columns for PIP No, PIP Type, PIP Hours, End Date, Description, Work Order No., and Segment No. It currently shows 'No Data Found.'
- Completed & Expired Service Letters:** A table with the same columns as above. It contains 15 rows of data, including PIP numbers like P110588, P110627, P131143, etc., with descriptions such as 'Installing the 252-5219 lanyard on accug' and 'Replacing the 252-6945 mounting group fo'.

A left-hand sidebar contains navigation options: Configuration, Current Owner, Map, Media, Documents, Notes, Work Orders, Warranty, PM / CSA, Quotes, Opportunity, Reservations, Transaction Register, Condition Monitoring, SOS, Electronic Data, Inspections, Service Letters, and OLGA.

OLGA

The **OLGA** section details any predictions generated by OLGA for the equipment.

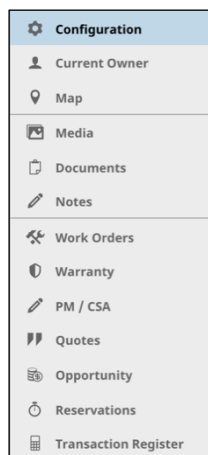
The screenshot shows the Uptake interface for the 'OLGA' section. The top navigation and header information are identical to the previous screenshot.

The main content area displays the 'OLGA' section with a table containing columns: OLGA No, Lead Score, Confidence Index, Desc, Job, Component, Utilization, Target SMU, Interval, Target Date, Time, and Status. The table currently shows 'No Data Found.'

The left-hand sidebar is identical to the previous screenshot, with 'OLGA' highlighted in the bottom navigation menu.

Other Sections

The remaining sections of EquipmentLink, shown in the left navigation panel, round out the history and details of the equipment:



- **Configuration** – Provides detail on the specific configuration of the equipment.
- **Current Owner** – Provides current owner details, contact information, and sales reps.
- **Map** – Provides a map view of the location from where the equipment last reported.
- **Media** – Displays all media files uploaded for the equipment. Also allows you to upload new files.
- **Documents** – Displays all documents uploaded for the equipment. Also allows you to upload new files.
- **Notes** – Displays all notes submitted for the equipment. Also allows you to submit new notes.
- **Work Orders** – Displays all work orders for the equipment, viewable by segment or by invoice.
- **Warranty** – Displays all warranties and work orders under warranty.
- **PM/CSA** – Displays all active and complete PM agreements, as well as all work orders under agreements.
- **Quotes** – Displays the latest sales and rental quotes, as well as the latest parts and services quotes.
- **Opportunity** – Displays the latest sales and rental opportunities, as well as the latest parts and services opportunities.
- **Reservations** – Displays the current reservations, as well as waiting list reservations.
- **Transaction Register** – Displays all transaction registers, separated by machine and attachments.

GLOSSARY

A

Alert

Notification that provides users with information about what needs to be addressed. In the CM Portal, alerts can come from different sources: oil sample testing, Product Link, and Inspections. They are also coded according to their urgency: AR (Action Required, red), MC (Monitor Compartment, yellow), and NAR (No Action Required, green).

AR

Action Required (often displayed in red) – Alert indicating that immediate action is needed.

F

FC

Fault Code

M

MC

Monitor Compartment (often displayed in yellow) – Alert that calls for more observation but not immediate action.

N

NAR

No Action Required (often displayed in green) – Alert that can be ignored.

O

OLGA

Online Lead Generation Analyzer – Application that uses telematics and dealer data to predict when equipment will need maintenance or repairs.

P

PL

Product Link – A remote monitoring and telematics system for Caterpillar equipment that wirelessly transmits small data sets such as events/faults, operating hours, location, etc.

S

SL

Service Letter

SOS or S.O.S.

Scheduled Oil Sampling – Caterpillar's Scheduled Oil Sampling (S.O.S.) service (of oil and coolant) is a network of laboratories operated by Caterpillar and its dealers, located throughout the world. These laboratories are intended to provide a consistent analysis methodology and store analysis results in a common database. All SOS lab results are also reviewed manually by an SOS analyst, who will provide an overall evaluation of the sample (no action required, monitor condition, or action required), optional textual comments, and a service recommendation, if applicable.

T

TA

Technical Analysis (Inspection)

U

UC

Undercarriage