Asset IO for Dealer Condition Monitoring Portal & EquipmentLink

USER GUIDE Updated June 13, 2019

Table of Contents

DISCLAIMER	
TRADEMARKS	
CUSTOMIZATION	
INTRODUCTION	4
Condition Monitoring Portal	
Navigating the CM Portal Dashboards	
EquipmentLink	5
Global Navigation	
Navigation Bar	
Condition Monitoring Tab	7
Condition Monitoring Portal	
CMA Dashboard	
Cases Summary	9
Alerts by Data Source	
Alerts by Compartment	
Aging Alerts	
Equipment Group Table	
Alerts Review Summary	
Alerts Received	
Alerts Reviewed	
Red Alerts Review Timing	
Alerts Review Summary	
CMA Activity Scorecard	
Alerts Reviewed	
Cases	
Lead Won Amount	
CMA Activity Scorecard	
My Cases	
Groups	
Fleet Reports	
CMP Admin	

CONDITION MONITORING PORTAL & EQUIPMENTLINK

EquipmentLink	. 21
Condition Monitoring	. 21
SOS	. 23
Electronic Data	. 24
Inspections	. 25
Service Letters	. 26
OLGA	. 26
Other Sections	. 27
Glossary	. 28

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 This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates.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

All products detailed in this document are the property of Uptake and cannot be used or reproduced by any person or company without a purchased license agreement or having the written consent of Uptake. Any unauthorized reproduction of product and relating documents are subject to legal action; and is protected by Federal, Provincial and Local law. Any concerns as to the legality of reproduction should be directed to: Uptake 1 Robert Speck Pkwy, Mississauga, ON L4Z 2G5, Canada Suite 800. (905) 712-3840.

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

	📀 🔊 Equipment 🔻 🏌 Service 🔻 🔠 Admin	(Production) 🔗 🔒
	Condition Monitoring \equiv Inventory \equiv	
Search Cases	- Q Keywords	r. Demo (CMA Admin) 🔍 Search Equipment 🖃

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** licon 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.

Search	Cases ~	🔍 Keywords	Case No.	Description	Equipment	Customer

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

🔍 Search 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	sos	Electronic Data	Service Letters	Inspections
- CMA Dashboard - Alerts Review Summary - CMA Activity Scorecard - My Cases - Groups - Fleet Reports - CMP Admin	^L Summary ^L Search	L Summary L Search	L Summary L Search	L Summary L Search L New Inspection Form L Inspections Alert Summary

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

			Closed (30 Days)	
:MA	Active	Pending	w/ Lead	No Lead	
Aileen Villarreal	2	0	0	0	
demouser1 Demo	<u>43</u>	4	1	0	
demouser2 Demo	<u>20</u>	2	0	0	
greg.chard Demo	1	0	0	0	
novakz Demo	2	0	0	0	
osirop 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.

UPTA	Ке 🛞	o Equipment	▼ 🎸 Service ▼	🔠 Admin						(Produ	ction) 🔗 🤞
		ndition Mon	itoring $ \equiv$ 1	nventory $ \equiv$							
Search Servic	e Letters	▼ Q Keyw	ords						r. Demo (CMA Admin)	🝳 Search Equipment	≡.
Division:	All	~	CMA User:	demouser1 Demo	- State	IS: Active	Pending	Closed with Lead	Closed without Lead		
Family:		Ŧ	Event Type:	SOS PL TA	SL 🗹 OLGA 📃 🖌	lert Related Onl	у				
Date Search:	Open Date	Ŧ	From:		To:		111				
										Filter	Clear
Case List											\$ %
Case #	Status	Open Date	Closed Date	Assigned To	Owned By	Make	Serial No	Customer No	Name	Description	
00405	Pending	Aug 24 2018		Joey Glenn	demouser1 Demo	AA	0ADF45538	1012450	JVS CONTRACTOR LTD	TEST	
00403	Pending	Aug 24 2018		Joey Glenn	demouser1 Demo	AA	0FGC45538	1337300	MMH CONSTRUCTION INC	TEST	
00386	Pending	Jul 12 2018		Chanel Smith	demouser1 Demo	AA	0NMY39385	1848525	LUN MECHANICAL SERVICES IN	IC ttt	
00401	Pending	Jul 27 2018		Christel Baird	demouser1 Demo	AA	0ALC39385	1848525	LUN MECHANICAL SERVICES IN	IC 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**.

UPTA	Case Detail For	100405						ē 8	oduction) 🔗 🔒
	Case								
Search Service	Case	100405	Status:	Pending	Owner:	demouser1 Demo	Assigned To:	Joey Glenn 🗙	=-
Division:	Created By:	demouser1 Demo	Created On:	Aug 24, 2018	Last Chan	ged By: demouser1 Demo	Last Changed On:	Aug 24, 2018	
Family:	Equipment)		Cust	omer		Con	partments	
Date Search:	Manufacture	: CATERPILLAR		Custo		Division: PGG	3 Tran	smission	
Dute Dearen		0F45538 Year: 2016	Model: 980M	Numb		ACTOR LTD			
	No: Family:	WHEEL LOADER		Name		ACTOR LTD			er Clear
Case List	r uniny.	WHELE EONDER		City:	Rhodes				Q 95
Case #									
100405 100403	Description:								
100386	TEST								
100401									
	Recommenda	ition:							
	TEST								
	Risk If Action	Not Taken:							
	TEST								
	Lead No 162	260 Close Case						Edit	
	Alerts				\$ %	File Attachments		\$% G	
	Ref No	Type Compartme			Action	File Descr Crea Created	By Last Changed	Changed By	
	178385001	SOS Transmissio	IN THE ANALYSIS OF	THE OIL SAMPLE TAKEN	I F	No Data Found.			
Total Records:	Related Data	1			\$ %				J

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 Grou	ps							
ABC CONSTRUCTION L	3	0						
Advanced Disposal -Western Berks 💄	3	2	1 7	1 3		1	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
 - o Not Monitored
- **EMT** Equipment monitored under various agreements in Uptake's EMT (Equipment Monitoring Toolkit) application.
 - o CSA Equipment
 - o 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.

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

UPT	AKE	Condition Mor	・ ≪ Service 、	Inventory									ction) 🔗
arch Serv	vice Letters	👻 🔍 Keyv	vords						r. Dem	o (CMA Admin)	Q Search	Equipment	
Events	PL 🗹 TA	Sr 🗆 C	Divisio	n: All	▼ Family:			▼ Alert F Only:	telated	All Equipment	Ŧ	July 2018	Total Ale
lerts													
Alerts													\$
erial No	Make	Model	Make Desc	Customer No	Customer Na Division	Product Code	Service Meter	Compartment	Туре	Ref No D	ate	Description	Status
5U93432	AA	836K	CATERPILLAR	1364650	NMZ WELL D PGGG	E	7047 H	Engine	1		il 30 2018	No Action Re	X
45538	AA	336E	CATERPILLAR	1092726	HSZ CONTRA PGGG	F	7246 H	Electrical	T	Ju	il 30 2018	Monitor Co	~
F93432	AA	938K	CATERPILLAR	1837885	IFW MECHAN PGGG	D	6038 H	Electrical	Ø	Ju	il 30 2018	Monitor Co	X
DP45538	AA	962K	CATERPILLAR	1726750	ZFV CONSTR PGGG	D	12861 H	Engine	Ŷ		il 30 2018	No Action Re	X
DP45538	AA	962K	CATERPILLAR	1726750	ZFV CONSTR PGGG	D	12861 H	Engine	Ŷ	Ju	il 30 2018	No Action Re	X
B58265	AA	D6TLGP	CATERPILLAR	1848525	LUN MECHA PGGG	A	5319 H	Engine	T	Ju	il 30 2018	Monitor Co	X
B58265	AA	D6TLGP	CATERPILLAR	1848525	LUN MECHA PGGG	A	5319 H	Engine	Ŷ	Ju	il 30 2018	No Action Re	X
D45538	AA	950K	CATERPILLAR	1582800	TKU EXCAVA PGGG	D	7127 H	Engine	٩	Ju	il 30 2018	No Action Re	~
N72225	AA	420DII	CATERPILLAR	1746650	YIL MECHANI PGGG	х	10566 H	Other	D	Ju	il 30 2018	Action Requi	~
FN72225	AA	420DII	CATERPILLAR	1746650	YIL MECHANI PGGG	х	10566 H	Other	D	Ju	il 30 2018	Action Requi	~
FN72225	AA	420DII	CATERPILLAR	1746650	YIL MECHANI PGGG	х	10566 H	Other	D	Ju	il 30 2018	Action Requi	~
N72225	AA	420DII	CATERPILLAR	1746650	YIL MECHANI PGGG	х	10566 H	Other	D	Ju	il 30 2018	Action Requi	~
0W72225	AA	938F	CATERPILLAR	1042400	PJV CONSTR PGGG	D	12741 H	Other	D	Ju	il 30 2018	Action Requi	X
DW72225	AA	938F	CATERPILLAR	1042400	PJV CONSTR PGGG	D	12741 H	Other	D	Ju	il 30 2018	Action Requi	X
JL43556	AA	980M	CATERPILLAR	1180400	EAU EXCAVA PGGG	D	6642 H	Hydraulic	Ð	Ju	il 30 2018	No Action Re	X
M58265	AA	D6TLGPT4F	CATERPILLAR	1134155	ETV WELL DR PGGG	A	3046 H	Hydraulic	T	Ju	il 30 2018	Monitor Co	X
3/20718	AA	D6TLGP	CATERPILLAR	1848525	LUN MECHA PGGG	A	7436 H	Engine	Ŷ	Ju	il 30 2018	No Action Re	X
3J20718	AA	D6TLGP	CATERPILLAR	1848525	LUN MECHA PGGG	A	7436 H	Engine	Ð	Ju	il 30 2018	Monitor Co	X
GH26272	AA	AP1055F	CATERPILLAR	1244305	BIS WELL DRI PGGG	Q	2090 H	Unknown	T	Ju	il 30 2018	Monitor Co	X
						0		Unknown	Ø		il 30 2018		X

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

- Δ (flask) Oil Samples
- C (page) Inspections
- 💿 (antenna) Electronic Data
- 🖾 (envelope) Service Letters

The icons in the Status column represent the following:

- 🕺 (speaker with a slash) Silenced
- **I** (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	y Scorecard												\$ %
			Reviewe	d Alerts		Ca	ses			Current Sta	tus of Leads		
Year	Month	Total	AR	MC	NAR	Total	W/Lead	No Lead	Lead	Opp	Lost	Won	Won\$
2018	Apr	<u>88</u>	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	<u>40</u>	<u>10</u>	<u>10</u>	20	Z	1	0	1	1	0	3	33458.00
2018	Jul	1565	402	427	736	<u>15</u>	4	0	3	0	1	<u>6</u>	26959.00
2018	Aug	<u>612</u>	102	135	375	3	0	0	0	0	0	2	2720.00
2018	Sep	446	121	<u>94</u>	231	2	1	0	2	0	0	0	0
2018	Oct	<u>1960</u>	480	538	<u>942</u>	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															
Alerts															
Serial No	· · · · · · · · · · · · · · · · · · ·														
0PRA93432	AA	D6NLGP	CATERPILLAR	HEAVEN	NFB CONSTR PGGG	А	2514 H	Hydraulic	Δ		May 13 2018	No Action Re	×		
0PRA93432	AA	D6NLGP	CATERPILLAR	HEAVEN	NFB CONSTR PGGG	A	2514 H	Cooling	Δ		May 13 2018	No Action Re	×		
0EMY45538	AA	M318	CATERPILLAR	1042400	PJV CONSTR PGGG	R	8239 H	Other			May 13 2018	Action Requi	×		
0EMY45538	AA	M318	CATERPILLAR	1042400	PJV CONSTR PGGG	R	8239 H	Other			May 13 2018	Action Requi	×		
0EMY45538	AA	M318	CATERPILLAR	1042400	PJV CONSTR PGGG	R	8239 H	Other			May 13 2018	Action Requi	×		
0PRA93432	AA	D6NLGP	CATERPILLAR	HEAVEN	NFB CONSTR PGGG	A	2514 H	Other			May 11 2018	Action Requi	 Image: A second s		
0PRA93432	AA	D6NLGP	CATERPILLAR	HEAVEN	NFB CONSTR PGGG	A	2514 H	Other			May 11 2018	Action Requi	×		
0PRA93432	AA	D6NLGP	CATERPILLAR	HEAVEN	NFB CONSTR PGGG	А	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	<u>0WJK45538</u>	1023150	UKT CONTRACTOR LTD	Persistent Steering Issues affecting per
100382	Active	Jun 30 2018			demouser2 Demo	AA	0XMY93432	1042400	PJV CONSTRUCTION INC	dkdkkd
100377	Active	Jun 11 2018			demouser2 Demo	AA	00KN72225	1366350	GZB MECHANICAL SERVICES INC	Repair required
100378	Closed	Jun 15 2018	Jun 18 2018		demouser2 Demo	AA	00KN72225	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,d;kf
<u>100381</u>	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	0VBK93489	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.

Opportur	nities				
CMA Opp	ortunity				\$ %
Орр	Stage	Status	Description	Revenue Customer Serial Number	Manufacturer
162209	Opportunities	Active	ttt	1,100 1093850 <u>0AOV45538</u>	CATERPILLAR
162237	Opportunities	Active	Fix this machine	20,874 1203250 <u>0HEN93489</u>	CATERPILLAR
162201	Opportunities	Active		120 1337300 <u>OMNF39385</u>	CATERPILLAR
162208	Opportunities	Closed		2,000 1012450 <u>0ADF45538</u>	CATERPILLAR
162220	Opportunities	Closed		770 1042400 <u>0GQD58265</u>	CATERPILLAR
162235	Opportunities	Pending	emission problems	2,095 1848525 <u>0ALC39385</u>	CATERPILLAR

My Cases

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

	KE ®	o ^O Equipment	🔹 🌾 Service 🔻	H Admin							(Production) 🔗 🧯
		ondition Moni	itoring $ \equiv$ I	nventory $ \equiv$							
Search Cases		- 🔍 Keywa	ords							r. Demo (CMA Admin)	Search Equipment
Division:	All	Ŧ	CMA User:	demouser1 Demo	~	Status:	🗹 Active	🗹 Pending	🗹 Closed with Lead	Closed without Lead	
Family:		Ŧ	Event Type:	SOS PL TA	SL 🗹 OLGA	🗹 Aler	t Related Only	/			
Date Search:	Open Date	-	From:		1111	То:					
											Filter Clear
Case List											\$ %
Case #	Status	Open Date	Closed Date	Assigned To	Owned By	N	1ake	Serial No	Customer No	Name	Description
100452	Active	Mar 28 2019			demouser1	Demo A	А	00LB8436	7 1002325	FPD CONTRACTOR LTD	Fix it
100385	Closed	Jul 12 2018	Jul 18 2018		demouser1	Demo A	А	0ADF4553	8 1012450	JVS CONTRACTOR LTD	
100405	Pending	Aug 24 2018		Joey Glenn	demouser1	Demo A	A	0ADF4553	8 1012450	JVS CONTRACTOR LTD	TEST
100446	Active	Mar 26 2019			demouser1	Demo A	A	0BEF43556	1023150	UKT CONTRACTOR LTD	Engine seems to be overheating - show.
100447	Active	Mar 27 2019			demouser1	Demo A	A	01KP93489	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.

UPTAKE Image: Service state Image: Service state Image: Admin Condition Monitoring Image: Image: Service state Image: Service state Image: Service state	(Production	on) & 🖶
Search Cases - Q Keywords	r. Demo (CMA Admin) 🛛 🔍 Search Equipment	=.
A My Groups 🔶 🕆 🗮・ 🚯 Global Groups 🕂 🕆 🖶		
Global Groups		
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].

요 My Grou	ıps + ♥ + ≡-	🕄 Global Grou	ups +? +≡									
< Back												
Group Nar	ne:				Dashboard:	Group Type:	Mine Global				ta Reset	Save
											📥 Add Equipment	\$ %
Action	Serial No.	Manufacturer	Model	Division Product Family	Customer N	Customer Name	CM Status	Status Date	Score	Total	Engine	Coo

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].

								C 🗘 🕫
Q 416c								
Customer No.	Cust Address	StoreGrp	Make Code	Man Equi	Serial No.	Stock No.	Model	Year
1423830	GXW 973 West Green Fabi	ien Av	AA	CAT	0AAH69957	M1099172	416C	2000
📫 1115515	YIO 963 South New Stree	et	AA	CAT	0AAM45572	M8301675	416C	1999
HEAVEN	NFB 927 North Rocky Not	bel Bl	AA	CAT	0AAQ45572	M4208532	416C	1997
1066515	IGE 425 South Fabien Str	reet	AA	CAT	0AEW69957		416C	2000
🛖 1115100	WJS 866 South White Fab	oien W	AA	CAT	0AEX72225	M2465656	416C	1998
1221202	LQP 929 White Hague Blv	/d.	AA	CAT	0AGJ45572	M8401926	416C	1997
HEAVEN	NFB 927 North Rocky Not	bel Bl	AA	CAT	0AIR26272	M2930172	416C	1997
1084055	KQK 284 South Clarendor	n St.	AA	CAT	0AJF84367	M3232294	416C	1998

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** \bowtie icon in the **File** column of the desired report, if available.

UPTAKE ^③ ^② ^Q Equipment • • • • • • • • • • • • • • • • • • •	≪Service ▼ ⊞ Admin	I							(Produc	tion) 🔗 🔒
Search Cases - Q Keywords						r. Demo (CMA	Admin)	Q Search	Equipment	
Report List Automated Reports										
									🗘 🌮 📃 Hid	e Inactive
					L	ast run			Schedule	
Report Name	# of Accounts	# of Units	# of Accounts	# of Units	on	Period	File	Interval	Next Run	Actions
ABC CONSTRUCTION FLEET REPORT	1	3	1	3	Apr 01, 2019	From Apr 02, 2019 to Apr 02, 2019		Daily	Apr 02, 2019	
Anderson Construction	1	2	1	2	Apr 01, 2019	From Mar 31, 2019 to Apr 01, 2019		Daily	Apr 02, 2019	
BERG CONSTRUCTION FLEET REPORT	2	11	2	11	Apr 01, 2019	From Apr 02, 2019 to Apr 02, 2019		Daily	Apr 02, 2019	
Fidelity Fleet Report	1	13	1	13	Apr 01, 2019	From Jan 01, 2018 to Dec 31, 2018	×	Daily	Apr 02, 2019	
Mumford & Miller	1	1	1	1	Apr 01, 2019	From Mar 31, 2019 to Apr 01, 2019		Daily	Apr 02, 2019	
National Gypsum	1	2	1	2	Apr 01, 2019	From Mar 31, 2019 to Apr 01, 2019		Daily	Apr 02, 2019	
PAK_Greggo & Ferrara_Monthly Fleet Usage	3	2	3	2	Apr 01, 2019	From Mar 31, 2019 to Apr 01, 2019		Daily	Apr 02, 2019	
Port Contractors	1	8	1	8	Apr 01, 2019	From Mar 31, 2019 to Apr 01, 2019		Daily	Apr 02, 2019	
S J A Construction	1	9	1	9	Apr 01, 2019	From Mar 31, 2019 to Apr 01, 2019		Daily	Apr 02, 2019	
Seravalli	1	14	1	14	Apr 01, 2019	From Mar 31, 2019 to Apr 01, 2019		Daily	Apr 02, 2019	
Test EAU Excavationg	1	10	1	10	Jun 04, 2018	From May 01, 2016 to May 30, 2016	x	Daily	Jun 05, 2018	

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** \mathbb{Z} icon in the **Actions** column. This will display the **Report Configuration** tab.

eport Configuratio	on History 168						
					Save Reset	🗙 Delete 🕒 Close	Generate
Customer Repo	rt Header						
Fleet Report Nam		ort		Review Required 🗹 Enabled			
Customers Q							
(1302070) - XEC	2 WELL DRILLING INC						
-							
Schedule			Customer Email List 🤉 🔶	Internal Email List 🤉	Report Sections		
	Jun 23, 2016		Customer Email List 🍳 🎓	demouser1 Demo	Report Sections Summary		
Schedule			Customer Email List 🤇 🔹			Z Asset Utilization Tab	
Schedule			Customer Email List 🍳 🚸	demouser1 Demo	Summary	Asset Utilization Tab	
Schedule Start Date:* End Date:	Jun 23, 2016 Daily		Customer Email List 🍳 🌑	demouser1 Demo	Summary Fleet Summary Tab	Asset Utilization Tab	
Start Date:* End Date: Type:*	Jun 23, 2016	-	Customer Email List 🍳 🐞	demouser1 Demo	Summary Seet Summary Tab Equipment		

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** k icon to download a specific instance of a report. Click the **Envelope** \bowtie icon to email a specific instance of a report.

Report Configuration History 167											
History List											\$ %
Report Name	Туре	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	x 🖂
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 soring for alerts by compartment, map components to compartments, and complete other administrative tasks.

ι	UF			Service 🔻 🔛 Admin	-								(Production) 🔗 🖶
Sea	arch	Cases								r. Demo (CMA Adm	in) 🔍 Se	arch Equipme	nt 🖃
ľ	Mana	igement											\$%
	h	CMP Compartments											t Reset 💾 Save
ľ	Марр	bing		Compartment				SOS			FC		
	Δ	sos	English	Spanish	Active	Last Last	AR	MC	NAR	AR	MC	NAR	AR
	<u>1</u>	SOS - Import	Unknown	Unknown	2		10	5	0	10	5	0	10
	P	Electronic Data - Module	Engine	Engine	\checkmark	Feb	10	5	0	10	5	0	10
	€£9	Electronic Data - Module	Cooling	Cooling	\checkmark	Feb	10	5	0	10	5	0	10
	P	Electronic Data - Event	Transmission	Transmission	\checkmark	Feb	10	5	0	10	5	0	10
	P	Electronic Data - Diagnostic	Drivetrain	Drivetrain	\checkmark	Feb	10	5	0	10	5	0	10
		-	Hydraulic	Hydraulic	\checkmark	Feb	10	5	0	10	5	0	10
	\checkmark	STW TA Component	Electrical	Electrical	\checkmark	Feb	10	5	0	10	5	0	10
	3	SMCS Component Codes	Other	Other	\checkmark	Feb	10	5	0	10	5	0	10
<		, swics component codes	UC	UC	\checkmark		10	5	0	10	5	0	10
	line in the second s	Opportunity Category											
	\checkmark	CAT Used Component											
	\checkmark	CAT Used Manufacturer											
	v	CAT Inspect Component											
	\checkmark	CAT Inspect Manufacturer											
	0	OLGA											

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.

U	PTAKE 🖻	° Equipment		rvice 🔻 👯 Admi 📃 Inventory									on) & 🔒
										r. Demo (Ad	min) 🔍 Sea	rch Equipment	=.
P	S/N: 0IDR9343 2006 CATERPILLAR (2 - D6RLG AA) TRK-TYPE	iP TRACTOR		NSTRUCTIO	N INC City: Weyauwega		MU: 13,141H ock No.: M153148	l(Unknown) oi 13 Unit #: E1	n Jan	Service Letter): 20 ⊻: 11 s:0 Score: 110	
1	Configuration	Equipmer	nt's Health		CM Recommer	tatus: Immediate and indiate and indiation: Machine is not roiselda Tran on: Sep 17, 20	eporting since 20		• 2			Monitored 🕑 Yes	5 🛞 No
	Media	engin	- •	TRANSMISSION *	DRIVETRAJ	N 🗙 💛 HYDRAUL	IC 🗸 🔶 E	LECTRICAL 🗸		✓ ● OTHER	↓ 0 ∪C	V 😑 UNKNO	wn 🗸
Ĝ	Documents	Equipme	nt Timelin	e			Compartment:	All	•	Lifespan Last ye	ear 6 months 3	months Last Month	Custom
4	Work Orders											+ -	
C	Warranty											G	N
0	° PM / CSA											0	
< "											с О	10 events	
	Opportunity										D	4 events 20 events	
Č		2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
		2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
	sos		481	368		41	23	0		6		e No. 100409 - Openeo	l Oct 09. 🔊
G	Electronic Data	< All Ev	ents 📥	All Alerts	Outstanding	Alerts Silenc	ed Alerts 🐸	OLGA 🤮	Cases & Leads	Work Orde	ers 🗳 🗸		· · · · · · · · · · · · · · · · · · ·
G	Inspections	Event Type	: 🗹 🛆	2 @ 2 D	⊻⊠ ⊻0								
	Service Letters												\$ %
C) OLGA	Type Ref				vent Description heck all fluid levels				St	tatus 🗹	Change	User Ch

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.

2006 CATERPILLAR (AA) TRK-TYPE TRACTOR No: 1042400 (PGGG) City: Weyauwega Stock No.: M1531483 Unit #: E1119	S/N: 0IDR93432 - 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	
---	---	---	---	--

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

This section also displays the location of alerts by compartment.

Equipment's Hea	lth		Immediate action is re Machine is not reporting si n on: Sep 17, 2017 (17 day	nce 2015	C D		Monitored 🕑 Yes 🛞 No
ENGINE		DRIVETRAIN A	HYDRAULIC	ELECTRICAL	COOLING A	OTHER A	UC A UNKNOWN A
0	0	0	0	0	0	D 8 0	

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:

- $\stackrel{\triangle}{\rightarrow}$ (flask) Oil Samples
- 🗘 (page) Inspections
- (antenna) Electronic Data
- 🖾 (envelope) Service Letters
- O (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.

All Alerts ³²⁶ Outstanding Alerts ⁴¹ Silenced Alerts ¹¹ OLGA ⁰ Cases & Leads ⁵ Work Orders ⁴⁴	1 Case No. 100409 - Opened Oct 09, 2018 ဇိ 寠 📡
---	---

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

							\$ 79
/pe	Ref No.	Date	Compartment	Event Description	Status	Change User	Change Date
D	579156	Aug 19, 2018	Other	(GR) Check Antifreeze protection level -ELC: Adjust as recommended	✓ 🛳	demouser1 Demo	Feb 05, 2019
D	<u>579156</u>	Aug 19, 2018	Other	Check all fluid levels	X		
D	579156	Aug 19, 2018	Other	Sample all oil compartments	✓ 🛳	demouser1 Demo	Oct 06, 2019
D	<u>579156</u>	Aug 19, 2018	Other	Change Hydraulic System/Transmission Oil	X		
@	<u>519402</u>	Aug 18, 2018	Transmission	CID:299 FMI:8 Transmission Lever Position Sensor : Abnormal frequency, pulse width, or period	X		
	<u>504066</u>	May 30, 2018	Other	Sample all oil compartments	X		
D	504066	May 30, 2018	Other	(GR) Check Antifreeze protection level -ELC: Adjust as recommended	X		
	504066	May 30, 2018	Other	Check all fluid levels	X		
୭	455896	Mar 10, 2018	Transmission	CID:299 FMI:8 Transmission Lever Position Sensor : Abnormal frequency, pulse width, or period	X		

SOS

The **SOS** section displays all SOS results for the equipment.

U	PTAKE _	。 [●] Equipment ▼ 《 Service ▼ ondition Monitoring = I	H Admin					(Production) 🔗 🖶
			<u>, </u>			r. Demo (Admin) 🤉 Search Equ	ipment =•
(-é	S/N: 0IDR9343 2006 CATERPILLAR (32 - D6RLGP (AA) TRK-TYPE TRACTOR	PJV CONSTRUCTION J No: 1042400 (PGGG) C	NC ty: Weyauwega	SMU: 13,141H(Unknov Stock No.: M1531483 Un	vn) on Jan hit #: E1119	Letters:0 Service Letters:0	⊡: 11 core: 110
\$	Configuration	Compartments 🗘 🌮 🔇	Latest SOS by Compartme	ent				D %
<u>+</u>	Current Owner	Compartment	Compartment	Customer	Lab Control Number	Processed Date 4	Overall Interpretation	Interpretation
		Latest SOS By Compartment	HYDRAULIC SYSTEM	VJR PAVING	B190-47331-0022	Dec 27, 2018	No Action Required	RESULTS OF LATEST SAMPL
V	Map	ENGINE	RADIATOR	VJR PAVING	B190-47331-1010	Dec 27, 2018	No Action Required	ALL LEVEL 1 TESTS ARE WIT
2	Media	FINAL DRIVE REAR LEFT	FINAL DRIVE REAR RIGHT	VJR PAVING	B190-47331-0020	Dec 27, 2018	No Action Required	RESULTS OF LATEST SAMPL
ß	Documents	FINAL DRIVE REAR RIGHT	FINAL DRIVE REAR LEFT	VJR PAVING	B190-47331-0021	Dec 27, 2018	No Action Required	RESULTS OF LATEST SAMPL
6	Documents	FUEL SYSTEM	TRANSMISSION POWER SHIFT	VJR PAVING	B190-47331-0019	Dec 27, 2018	No Action Required	THE PARTICLE COUNT IS HI
Ó	Notes	HYDRAULIC SYSTEM	ENGINE	VJR PAVING	B190-47331-0018	Dec 27, 2018	No Action Required	RESULTS OF LATEST SAMPL
10	Work Orders	INSPECTION	FUEL SYSTEM	VJR PAVING	B190-46153-3002	Jul 01, 2017	No Action Required	ISO Code = 17/13. (CAT Rec
	Work Orders	RADIATOR	INSPECTION	VJR PAVING	B190-44282-5006	Nov 09, 2015	No Action Required	Brake accumalotor bracket
O C	Warranty	TRANSMISSION POWER SHIFT						
1	PM / CSA							
())	Quotes							
1	Opportunity							
Ō	Reservations							
	Transaction Register							
	Condition Monitoring							
4	sos							
Q	Electronic Data							
C	Inspections							
	Service Letters							
С) OLGA							

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

Compartments 🕸 🕫	ENGINE								Latest	Samp	les	Inter	pretat	ions	Met	al Ana	lysis H	istory	o	ther A	nalysis	Histo	ory
Compartment	Wear Metals							-			_			_							Ш	. 0:	el.
Latest SOS By Compartment	wear wetais																				<u></u>	L 43	22
ENGINE	From: 04/02/14		T	o:	04/02/	/19										X١	/alue T	vpe:	Pro	cessec	Date		-
FINAL DRIVE REAR LEFT					, -=,																		
FINAL DRIVE REAR RIGHT	(1.1 -				4 -						70	-					(1.1)	•••					
FUEL SYSTEM	0.8				3 -	4						-			1	-	0.8		••				
HYDRAULIC SYSTEM					-	Λ					40				-M								
INSPECTION	0.5				2 -	0000	0000	0000		***	20	12	~	$\mathbf{\Lambda}$	8 ¥	h. 9	0.5	5	+				
RADIATOR	0.2				14				- •9		20	Ý	- b.	<u> </u>	V.	~	0.2	2					
TRANSMISSION POWER SHIFT	0 +++++++++++++++++++++++++++++++++++++	•• ••••	****	PPP	0 -				тт	•m	0	+++++++				m	0		++ • ••	****	• • • • • •	••••	Pq
	Element:	1.20 ¹⁶ 201 0 ^{ct} 0 ^A ,201 Ag	6 2011 13 Dec2	1,2010		0 ²⁰¹⁴ 22	18, 2015	1.2016 0 ^{ct} 0 ^A	19 ^{13,201}	1, 2018		lement:		17.20% 17.20% B	2016,25 AU913,25	2011,20°		er 20,20,00,		10157,201 13117,002		2011 Dec21	2010
	Lab Control Number	Ag	AI	в	Ba	Ca	Cd	Cr	Cu	Fe	к	Mg	Mn	Mo	Na	Ni	Ρ	Pb	Sb	Si	Sn	Ti	٧
	B190-43087-0102	1	1	18	1	2101	1	1	5	12	1	514	1	22	2	1	1149	1	1	2	1	1	1
	B190-43140-0111	1	3	34	1	2223	1	1	2	9	1	574	1	27	5	1	1121	1	1	3	1	1	1
	B190-43206-0093	1	2	38	1	2031	1	1	1	9	1	626	1	34	4	1	1037	1	1	2	1	1	1

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.

							r. Demo (Admin) 🕴 🔍 Se	arch Equipment	
S/N: 0IDR934 2006 CATERPILLAR			PJV CONS No: 1042400 (IC y: Weyauwega	SMU: 13,141H Stock No.: M153148			
Configuration									Č Ø
L Current Owner		[
0	Message Type	All	Ŧ						
🖗 Мар						Message Info			
🖻 Media	ID	Message Type	Level	Occur. Count	Module	Fault Code	Fault Description	Event Date	Cust
Documents	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.	1042
J Documents	579149	Diagnostic	Level 2	1	Track Type Tract		Mode Select Switch : Voltage below normal	Dec 31, 2018 10:22 P.M.	1042
Notes 🖉	578547	Diagnostic	Level 1	2	Track Type Tract		Monitoring System Display : Abnormal update rate	Dec 29, 2018 07:48 P.M.	1042
Work Orders	578545	Diagnostic	Level 2	1	Caterpillar Moni		CAT Data Link : Data erratic, intermittent or incorrect	Dec 29, 2018 07:47 P.M.	1042
X. Mork Orders	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.	1042
D Warranty	575602	Event	Level 2	1	Engine Control #1		Low Fuel Pressure	Dec 22, 2018 04:22 P.M.	1042
PM / CSA	575589	Event	Level 1	1	Engine Control #1		Low Fuel Pressure	Dec 22, 2018 04:21 P.M.	1042
PM/CSA	559601	Event	Level 1	4	Engine Control #1	EID:172	High Air Filter Restriction	Nov 18, 2018 10:47 A.M.	10424
Quotes	558625	Event	Level 1	2	Engine Control #1		High Air Filter Restriction	Nov 16, 2018 02:18 P.M.	10424
P. Constanting Inte	544118	Event	Level 1	5	Engine Control #1	EID:198	Low Fuel Pressure	Oct 14, 2018 06:43 A.M.	10424
Opportunity	537823	Event	Level 1	1	Engine Control #1	EID:198	Low Fuel Pressure	Sep 30, 2018 06:30 A.M.	10424
D Reservations	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.	10424
Transation Basister	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.	1042
Transaction Register	518932	Event	Level 1	4	Engine Control #1	EID:198	Low Fuel Pressure	Aug 17, 2018 08:40 P.M.	1042
Condition Monitoring	514965	Event	Level 1	1	Engine Control #1	EID:172	High Air Filter Restriction	Aug 10, 2018 07:41 A.M.	1042
	507497	Diagnostic	Level 2	1	Engine Control #1	CID:296 FMI:9	Transmission Control : Abnormal update rate	Jul 21, 2018 09:00 A.M.	1042
sos	507496	Diagnostic	Level 2	1	Engine Control #1	CID:296 FMI:9	Transmission Control : Abnormal update rate	Jul 21, 2018 08:41 A.M.	1042
Electronic Data	507495	Diagnostic	Level 2	1	Engine Control #1	CID:296 FMI:9	Transmission Control : Abnormal update rate	Jul 21, 2018 08:25 A.M.	1042
	507054	Diagnostic	Level 1	2	Track Type Tract	CID:588 FMI:2	Monitoring System Display : Data erratic, intermittent	Jul 20, 2018 01:19 P.M.	1042
J Inspections	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.	1042
Service Letters	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.	1042
	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.	1042
O OLGA	506745	Diagnostic	Level 2		Track Type Tract		Blade Control Handle Lift Position Sensor : Voltage abo		

Inspections

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

U	PTAKE		▼ 🋠 Service ▼ 🔛 Admin hitoring ☰ Inventory ☰					(Production) 🔗 🔒
						r. Demo (Admin) 🔍 Search Equipr	ment 🖃
F	S/N: 0IDR934 2006 CATERPILLAR			RUCTION INC 566) City: Weyauwega		IH(Unknown) on Jan ^{1483 Unit #: E1119}		⊡: 11 re: 110
<	Configuration						New	Inspection Form
	Current Owner	Inspection Date	Customer Name	Customer No	Inspection Type	Evaluation		Source
6	Мар	May 12, 2017	PJV CONSTRUCTION INC	1042400	PM Checklist	3	4 Chuck Snyder	CatInspection
	Media	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
	Documents	Jan 22, 2018	PJV CONSTRUCTION INC	1042400	PM Checklist	4	3 Daniel Roberts	CatInspection
6	Notes	May 30, 2018	PJV CONSTRUCTION INC	1042400	PM Checklist	3	4 Daniel Roberts	CatInspection
5	Work Orders	Aug 19, 2018	PJV CONSTRUCTION INC	1042400	PM Checklist	4	5 Daniel Roberts	CatInspection
6	Warranty	Oct 19, 2018	PJV CONSTRUCTION INC	1042400	PM Checklist		Kyle Rost	CatInspection
		Dec 27, 2018	PJV CONSTRUCTION INC	1042400	PM Checklist		Kyle Rost	CatInspection
1								
< "	Quotes							
8	Opportunity							
đ	Reservations							
E	Transaction Register							
	Condition Monitoring							
- 4	SOS							
G	Electronic Data							
	Inspections							
	Service Letters							
0) OLGA							

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

ew Inspection Form							
Customer:*	ঀ	Serial No.:*	Q	Evaluation Lev	el *		
Inspection No.:*		Model:		Engine:	O NAR	Омс	AR
Year Of Manufacture:		Division:*	*	Cooling:	O NAR	Омс	AR
Manufacture: Manufacturer:	~	Family:		Transmission:	O NAR	Омс	AR
Created Date:*		Engine Serial #:		Drivetrain:	NAR	Омс	AR
_ast Modified:		Transmission		Hydraulic:		Омс	◯ AR
Originated by:	Q	Serial #: SMU:		Electrical:	○ NAR	🔾 мс	
Inspector:	ς α	Last Scheduled		Other:		Омс	
Reviewer:	a a	Oil Sample:		UC:	NAR	ОМС	AR
Sales Rep:	~	Last CTS Inspection:					
Branch:*	*	Last					
Asking Price:		Preventative Maintenance:	III				
		Final Price:					
		Reviewed:					

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.

Shr: DIDR93432 - DGRLGP 2006 CATERPILLAR (AL) TRK-TYPE TRACTOR PLY CONSTRUCTION INC. No: 1042400 (PGGG) No: 1012; Wayauwga) Stock No: M1531433 Unit #: E1119 A: 10 O: 20 A: 11 Configuration 2 Configuration 2 OutstanDine SERVICE LETTERS Stock No: M1531433 Unit #: E1119 D: 20 D: 11 Mala No Data Found. Verter Commer PP No PP Type PIP Hours End Date Description Work Order No. Segment No. Media Verter Commer PIP No PIP Type PIP Hours End Date Description Work Order No. Segment No. Verter PIP No PIP Type PIP Hours End Date Description Work Order No. Segment No. Verter PIP No PIP Type PIP Hours End Date Description W3272426 OI Verter PIP No PIP Type PIP Hours End Date Description W3272426 OI Verter Segment No. Segment No. Segment No. W3272426 OI W3272426 OI Segment						r. Demo (Ad	min) 🔍 Search Equip	oment
Current Owner PIP No PIP Type PIP Hours End Date Description Work Order No. Segment No. Map No bota Found. V <t< th=""><th>S/N: 0IDR934 2006 CATERPILLAR</th><th>32 - D6RLGP (AA) TRK-TYPE TRA</th><th></th><th></th><th></th><th>SMU: 13,141H(Unknown) on Jan</th><th></th><th></th></t<>	S/N: 0IDR934 2006 CATERPILLAR	32 - D6RLGP (AA) TRK-TYPE TRA				SMU: 13,141H(Unknown) on Jan		
Map Nota Found. Nature of the Control o	Configuration	OUTSTANDIN	IG SERVICE LETTERS					\$
Media Security Security <thsecurity< th=""> Security <th< th=""><th>Current Owner</th><th>PIP No</th><th>PIP Type</th><th>PIP Hours</th><th>End Date</th><th>Description</th><th>Work Order No.</th><th>Segment No.</th></th<></thsecurity<>	Current Owner	PIP No	PIP Type	PIP Hours	End Date	Description	Work Order No.	Segment No.
Documents Completed & Expired Service Letters Notes PIP No PIP Type PIP Hours End Date Description Work Order No. Segment No. PIP No PIP No PIP Type O Segment No. More Order No. Segment No. PIP No PIP No O Segment No. More Order No. Segment No. Verore No PISIAS S 0.5 Installing the 252-5219 lanyard on accug group for Varsing More Science Scie) Map	No Data Foun	ıd.					
Notes PIP No PIP Type PIP Hours End Date Description Work Order No. Segment No. Notes PID 558 S 0.5 Installing the 252-5219 lanyard on accug V3272426 01 Varianty PID 10588 S 0.5 Installing the 252-5219 lanyard on accug V3272426 01 Varianty PID 10522 S 1 Replacing the 252-5219 danyard on accug V3539651 01 PM / CSA PS2220 C 2 Jul 30, 2008 Replacing the isstemone front and rear i V3116434 01 PM / CSA PS42251 C S 0 02 01 <td< td=""><td>nedia 🖞</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<>	nedia 🖞							
NetsePIP NoPIP TypePIP HoursEnd DateDescriptionWork Order No.Segment No.PID 10588S0.5Installing the 25-2519 laryard on accugV/237242601Vex OrdersP100522S1Installing the 25-2529 destrounding group foV/237242601Pall 143P0Sep 30, 2008Relating the 252-9635 mounting group foV/93903.002PA / CSAP31143P0Sep 30, 2008Relating the citick-arge supply line on cV/931563101PA / CSAP52225C02Jul 30, 2010Replacing the citick-arge supply line on cV/93163201PA / CSAP52225C4Jul 30, 2011Replacing the implement valve mounting bVVPS4054C1Nov 30, 2015Updating product link software on certaiV/958572104OpportunityP51233A4May 30, 2013Replacing the dispart supply line on cV/958572104PS1235A4Dec 30, 2009Relating the dispart supply line on certaiV/958572104PS1236A4Dec 30, 2009Relating the dispart supply line on certaiV/958572104PS1237ASSp 30, 2009Relating the dispart supply	Documents	Completed &	Expired Service Lett	ers				\$
P1/0588 S 0.5 Installing the 25-2519 binyard on accug V372426 01 V Work Orders P10527 S 1 Installing the 25-2519 binyard on accug V372426 01 P10528 P2002 S 1 Replacing the 252-2519 binyard on accug V372426 01 P31133 P 0 Sep 30,2008 Flashing injector etrim files, on certai V935551 01 P47 (SA P52225 C 4 Jul 30,2010 Replacing the 251charge supply line on c V9358271 02 Opportunity P531233 A 4 May 30,215 Updating product link software on certai V9358571 04 Opportunity P531233 A 4 May 30,213 Replacing the file not ink software on certai V9358577 04 Transaction Register P531233 A 4 May 30,209 Replacing the file not ink software on certai V9358577 04 Transaction Register P531245 A 5 So 5 Softsoft A Softsoft		PIP No	PIP Type	PIP Hours	End Date	Description	Work Order No.	Segment No.
Pill 143 P 0 Sep 30, 2008 Flashing injector etrim files, on certal W3515661 01 PM / CSA PS52220 C 2 Jul 30, 2010 Repolarity files insparse supplications from and rear i W3114343 01 Quotes PS42225 C 4 Jul 30, 2011 Replacing the insplement valve mounting b W5582721 02 Quotes PS44044 C 1 Nov 30, 2013 Replacing the insplement valve mounting b W5582721 04 P reservations PS51233 A 4 May 30, 2013 Replacing the insplement valve mounting b W15585721 04 Transaction Register PS51233 A 4 May 30, 2013 Replacing the insplement valve mounting b W15598572 04 Transaction Register PS51245 C 1 May 30, 2013 Replacing the inter housing on various W15598572 04 So So Sp 30, 2009 Replacing the inter housing on various W15598572 04 So So Sp 30, 2010 Replacing the inter housing on various C2 and W15598572 04 So Sp 31492 A </td <td>Notes</td> <td>PI10588</td> <td>s</td> <td>0.5</td> <td></td> <td>Installing the 252-5219 lanyard on accug</td> <td>W3737426</td> <td>01</td>	Notes	PI10588	s	0.5		Installing the 252-5219 lanyard on accug	W3737426	01
Phila3 P 0 Sep 30, 2008 Flashing injector etrim files, on certai VMS15631 01 PM / CSA PS42220 C 2 U Jul 30, 2008 Reworking the systemone front and rear I VMS15631 01 PM / CSA PS42220 C 2 U Jul 30, 2010 Replacing the discharge supply line on VMS4901 01 PM / CSA PS4225 C 4 Jul 30, 2010 Replacing the implement valee mounting b VMS4901 <	Work Orders	PI10627	S	1		Replacing the 252-6945 mounting group fo	W9490861	02
PAI (CA PS2222 (C 2 (Ju		PI31143	Р	0	Sep 30, 2008	Flashing injector etrim files, on certai	<u>W3515661</u>	01
Part Cash PS42725 C 4 Jul 30, 2011 Replacing the implement value mounting b Quotes PS42725 C 1 Nov 30, 2013 Updating product link software on certai V/S58721 0 Z Opportunity PS31233 A 4 May 30, 2013 Replacing dry track cartridges on certai V/S585721 04 Reservations PS31233 A 4 May 30, 2013 Replacing dry track cartridges on certai V/S598572 04 Transaction Register PS31246 A 4 Dec 30, 2009 Revorking track cartridges that have wal Transaction Register PS31269 A 0.5 Jan 31, 2014 Replacing field center tracid idlers on) Warranty	PS42220	с	2	Jul 30, 2008	Reworking the systemone front and rear i	<u>W3114434</u>	01
Pound QuotesPS2225 PS4054C4Jul 30, 2015Replacing the implement valve mounting be0 opportunity PS1023PS4054C1Nov 30, 2015Updating product link software on certai0 opportunity PS1233PS1233A4May 30, 2013Replacing dry track carridges on certai1 ransaction RegisterPS1263A4Dec 30, 2009Replacing dry track carridges that have wal1 ransaction RegisterPS1529A5Sep 30, 2009Replacing the littler housing on various1 ransaction RegisterPS1529A0.5Jan 31, 2010Replacing the littler housing on various2 condition MonitoringPS1529A0.5Jan 31, 2010Replacing the heui pump on various c2 and3 condition MonitoringPS1529A24Oct 30, 2012Replacing the heui pump on various c2 and4 condition MonitoringPS1529A24Oct 30, 2012Replacing the heui pump on various c2 and5 condition MonitoringPS1529A24Oct 30, 2012Replacing the heui pump on various c2 and6 lister Housing Data SizeFeb 23, 2013Replacing the heui pump on various c2 andImage: Size9 lister Housing Data SizeA24Oct 30, 2012Replacing the heui pump on various c2 and9 lister Housing Data SizeA6Jan 31, 2014Replacing the heui pump on various c2 and9 lister Housing Data SizeA5Feb 28, 2013Replacing the rar track rolle9 lister Housing Data Size <td>PM / CSA</td> <td>PS42361</td> <td>с</td> <td>5</td> <td>Oct 30, 2010</td> <td>Replacing the discharge supply line on c</td> <td>W9490861</td> <td>01</td>	PM / CSA	PS42361	с	5	Oct 30, 2010	Replacing the discharge supply line on c	W9490861	01
PSB/02 C I NOV 30, VDS Opportunity PSSB/22 NOV 30, VDS Opportunity NOV 30, VDS	,	PS42725	с	4	Jul 30, 2011	Replacing the implement valve mounting b		
bit PS1223 A 4 May 30, 2013 Replacing dry track cartridges on certal W3598572 04 PR servations PS1223 A 4 De 30, 2013 Replacing dry track cartridges on certal W3598572 04 Transaction Register PS1223 A 4 De 30, 2009 Revorking track cartridges that have wal 05 Image: Comparison of the comparison of	Quotes	PS44064	с	1	Nov 30, 2015	Updating product link software on certai	W5685721	02
Perservation Register PS31233 A 4 May 30, 2009 Replacing dry track cartridges on certal W3598577 04 Praneaction Register PS31263 A 4 Dec 30, 2009 Reworking track cartridges that have wal	Opportunity	PS44115	с	1	Jan 31, 2016	Updating product link software on certai		
Transaction Register Fails (Size) A F Dec. (Size) Note (Size) Not		PS51233	A	4	May 30, 2013	Replacing dry track cartridges on certai	<u>W3598577</u>	04
Instruction Register Essilation A 0.5 Jan 31, 2011 Replacing the filter housing on various Condition Monitoring Essilation A 0.5 Jan 31, 2011 Replacing the filter housing on various Condition Monitoring Essilation A 1 Sep 30, 2010 Reworking the dust ejector on certain d6 Sos Essilation A 5 Jul 30, 2011 Replacing the heuj pump on various c7 an Electronic Data Essilation A 24 Oct 30, 2012 Repairing cracks in the rear track rolle Inspections Elstration A 6 Jan 31, 2014 Repairing disck nav 10.4 displays (239-9)) Reservations	PS51246	A	4	Dec 30, 2009	Reworking track cartridges that have wal		
P53169 A 0.5 Jan 37, 201 Replacing the filter housing on various Condition Monitoring P55152 A 1 Sep 30, 2010 Revolving the dust ejector on certain d6 SoS P551728 A 5 Jul 30, 2011 Replacing the filter housing on various C7 an Electronic Data P551728 A 24 Oct 30, 2012 Repairing cracks in the rear track rolle Electronic Data P551728 A 6 Jan 31, 2014 Replacing the filter housing disc: Anav 10.4 displays (239-9) Inspections P551729 A 5 Feb 28, 2013 Replacing filter housing disc: dnav 10.4 displays (239-9)	Transaction Register	PS51269	A	5	Sep 30, 2009	Replacing failed center tread idlers on		
SOS PS51516 A 5 Jul 30, 2011 Replacing the heul pump on various c7 an PS61 PS51728 A 24 Oct 30, 2012 Repairing cracks in the rear track rolle Electronic Data PS51728 A 6 Jan 31, 2014 Repairing dts: 4 nov 10.4 displays (23.9-9) Inspections PS51720 A 5 Feb 28, 2013 Replacing dts: 4 nov 10.4 displays (23.9-9)		PS51409	А	0.5	Jan 31, 2011	Replacing the filter housing on various		
SOS PSS1728 A 24 Oct 30, 2012 Repairing cracks in the rear track rolle Electronic Data PSS1728 A 6 Jan 31, 2014 Repairing d3:c4 nav 10.4 displays (239-9 Inspections PSS1728 A 5 Feb 28, 2013 Replacing a failed hydraulic suction tub	Condition Monitoring	PS51452	A	1	Sep 30, 2010	Reworking the dust ejector on certain d6		
P551228 A 24 O C13,0210 Repairing cracks in the rear track rolle D Electronic Data P551284 A 6 Jan 31,2014 Repairing disck nav 10.4 displays (239-9) Inspections P551220 A 5 Feb 28,2013 Replairing a failed hydraulic suction tub	505	PS51516	A	5	Jul 30, 2011	Replacing the heui pump on various c7 an		
Inspections P551720 A 5 Feb 28, 2013 Replacing a failed hydraulic suction tub		PS51728	A	24	Oct 30, 2012	Repairing cracks in the rear track rolle		
2 Inspections	Electronic Data	PS51784	A	6	Jan 31, 2014	Repairing d3:c4 nav 10.4 displays (239-9		
/ mapeciona	Inspections	PS51790	A	5	Feb 28, 2013	Replacing a failed hydraulic suction tub		
PS52015 A 6 May 30, 2014 Replacing the ring gear and final drive	 mapectona 	PS52015	A	6	May 30, 2014	Replacing the ring gear and final drive		
) OLGA	PS52535	A	5	Nov 30, 2016	Replacing the wire fan guards on various		

OLGA

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

UPIAKE _	。● Equipment ▼ 《 Service							(Product	:ion) 🔗 🔒
						r. Demo (Admin	Search	Equipment	=·
S/N: 0IDR934 2006 CATERPILLAR	32 - D6RLGP (AA) TRK-TYPE TRACTOR	PJV CONSTRUCTION INC No: 1042400 (PGGG) City:	C Weyauwega	SMU: 13,141 Stock No.: M153	IH(Unknown) 1483 Unit #	on Jan	△: 10 ⑦: 2 Service Letters:0		
Configuration	OLGA OLGA No Lead Score	Confidence Index Desc Job	Component	Utilization	Target SMU	Interval Target Date	Time	Status	\$ %
Media Cournents Notes N									
Condition Monitoring Sos Electronic Data Inspections Service Letters OlGA									

Other Sections

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

Configuration	Configuration – Provides detail on the specific configuration of the
L Current Owner	equipment.
🖗 Мар	• Current Owner – Provides current owner details, contact information, and
💌 Media	sales reps.
🗘 Documents	• Map – Provides a map view of the location from where the equipment last
🖉 Notes	reported.
🛠 Work Orders	
Warranty	Media – Displays all media files uploaded for the equipment. Also allows
/ PM / CSA	you to upload new files.
PP Quotes	• Documents – Displays all documents uploaded for the equipment. Also
🕄 Opportunity	allows you to upload new files.
	• Notes – Displays all notes submitted for the equipment. Also allows you to
Transaction Register	
	submit new notes.
• Work Orders – Displays all work orders for the equipment, viewable by segment or by	

- 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

Α

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

Μ

MC

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

Ν

NAR

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

Ο

OLGA

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

Ρ

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.

Т

TA

Technical Analysis (Inspection)

U

UC

Undercarriage