Service Delivery

Equipment Monitoring Toolkit

USER GUIDE

Updated June 12, 2019

UPTAKE

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DISCLAIMER

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 This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates.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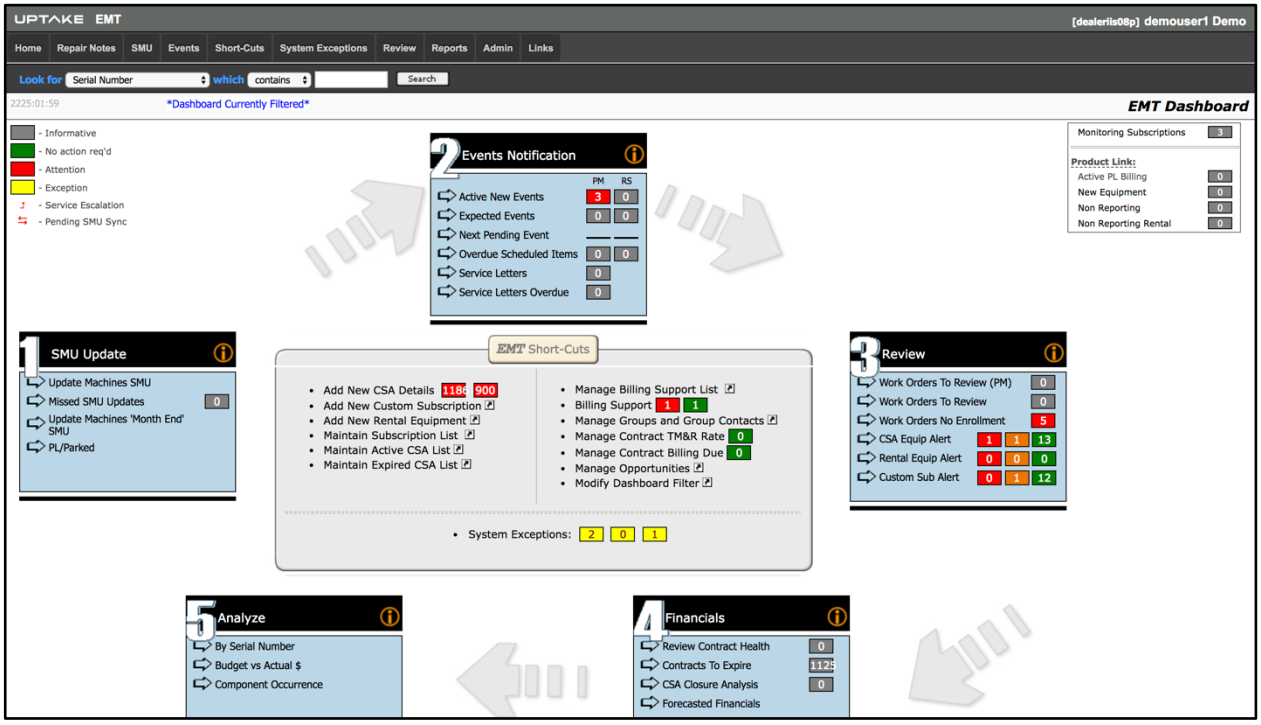
CUSTOMIZATION

This user guide will show you how to use the EMT application with the assumption that your dealership has made the migration to CloudLink and your EMT 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.

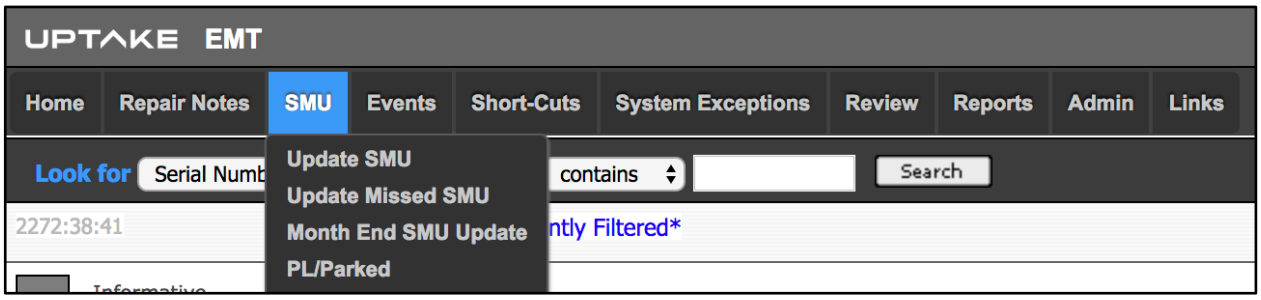
NOTE: EMT currently only supports the Google Chrome™ browser.

INTRODUCTION

Log in to CloudLink with your Username and Password, then click the **[ENTER]** button under **EMT**. You will be taken to the Equipment Monitoring Toolkit Home page.



Navigation Bar



Hover your cursor over the drop-down menus in the top navigation bar to access the different areas within EMT.

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Search

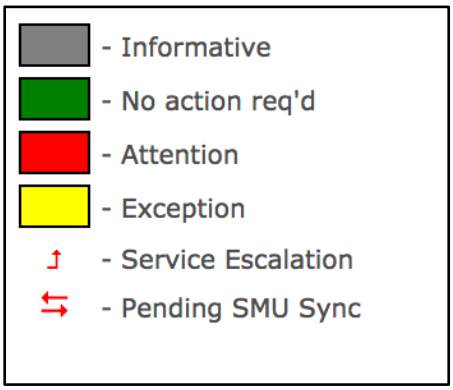
Search for specific information within EMT using the search bar at the top of the screen. Refine your search using the drop-down menus and text field, then click **[Search]**.

DASHBOARD

The EMT Dashboard is a collection of useful links and information and is arranged based on a recommended workflow.

Legend

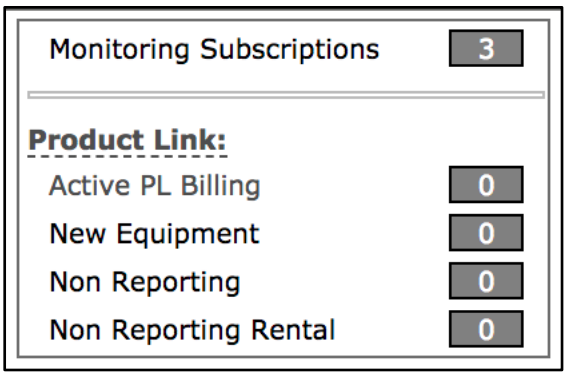
The smaller information boxes in the Dashboard are color-coded based on the following legend:



- **Informative**
- **No action req'd**
- **Attention**
- **Exception**
- **Service Escalation**: Displays in the Event or priority of Active new event.
- **Pending SMU Sync**: Displays in machine service tab in PM Code column, waiting to sync with Service Scheduler and Work orders (when closed).

Monitoring Subscriptions

The Monitoring Subscriptions box reports the number of machines that have Product Link installed.



- **Monitoring Subscriptions**: Equipment being monitored in EMT.
- **Active PL Billing**: Active Product Link devices.
- **New Equipment**: Product Link reporting readings but no rental contract.
- **Non-Reporting**: Product Link units that have not reported in a period of time, normally 7 days.
- **Non-Reporting Rental**: Product Link rental units that have not reported in a period of time, normally 7 days.

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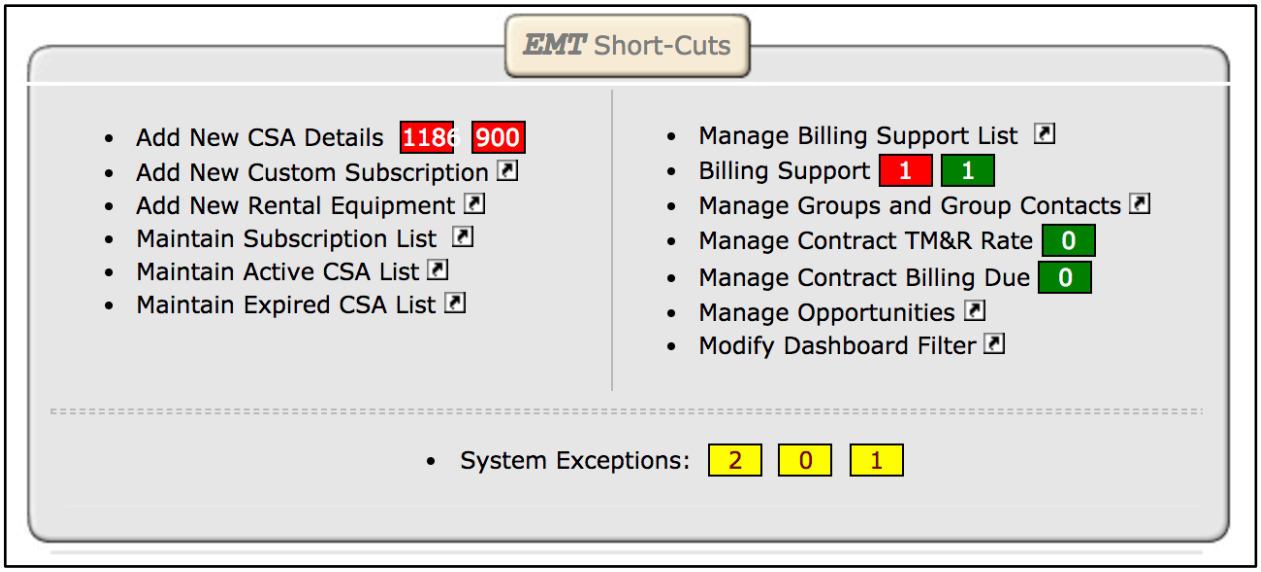
EMT Short-Cuts



Add New CSA Details

A list of serial numbers that have a CSA contract but are not set up in EMT. You have the option of setting up the serial number in EMT or deleting the equipment. As new contracts are added in DBS they are loaded into EMT overnight.

Add New Custom Subscription

This section allows you to add a machine to EMT without a CSA contract. You can also set up a serial number before the contract has been created, allowing EMT to begin monitoring.

NOTE: The equipment must already be in the dealer's equipment population.

Add New Rental Equipment

This list is the same as **Custom Subscription**, but the Machine type will default to Rental Fleet.

Maintain Subscription List

If you need to edit the CSC contract subscription, this will display a list with edit or delete options for all machines. A map link is also provided for equipment that is enabled with Product Link. The pop-up window will display the machine on a map along with any other equipment that is close by.

Clicking **[Edit]** will display the Machine Information page where you can edit the information.

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Clicking **[Delete]** will change the equipment status to Deleted. The system will ask for confirmation before deleting. You can undelete a serial number by hovering over the Admin menu and clicking on **Manage Deleted Equipment**.

Maintain Active CSA List

This list displays all equipment with an active CSA contract even if they are not being monitored by EMT. Click **[Edit]** to edit the equipment information, or click **[Delete]** to remove it from this list and into the Deleted Equipment list.

Maintain Expired CSA List

This list displays all equipment with an expired CSA contract even if they are not being monitored by EMT. Click **[Edit]** to edit the equipment information, or click **[Delete]** to remove it from this list and into the Deleted Equipment list.

Manage Billing Support List / Billing Support

The Invoice Supporting Data functionality of EMT allows a dealer to provide invoice supporting data to their customers. This does not create an invoice, but instead creates a customizable Excel sheet that can be attached to the invoice to show the customer the details that support the invoiced amount.

The invoice supporting data has two main processes:

1. Create and configure an invoice supporting template.
    a. Create the template and attach it to a customer.
    b. Determine the values that should be included in the supporting data.
    c. Attach one or more machines to the template.
2. Once a billing period is completed, EMT will generate the invoice supporting data.
    a. Based on the billing template parameters, EMT will automatically create a billing report.
    b. EMT uses the month end SMU readings that are set in Box 1 to determine the SMU reading at the beginning and end of the period.
    c. EMT uses the TM&R rate that is set on the Contract Information page to calculate the invoice amounts.
        i. If there are different TM&R billing amounts during the period, EMT will use the appropriate billing amount for each of the corresponding billing periods.
        ii. If the billing amount is a flat rate, EMT will calculate a daily rate.

Create and Configure Invoice Supporting Data:
Click on the **Manage CSA Billing List** link under Admin in the top navigation bar, or click **Manage Billing Support List** on the Dashboard.

The Manage CSA Billing List page displays a list of existing templates that have already been set up. Templates are linked to a customer and each customer can have 1 or more templates attached.

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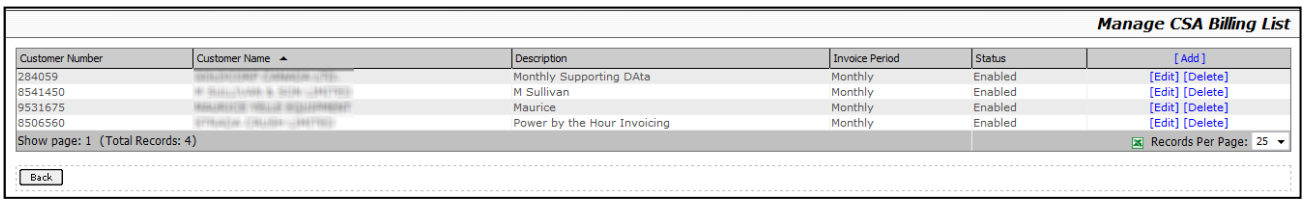
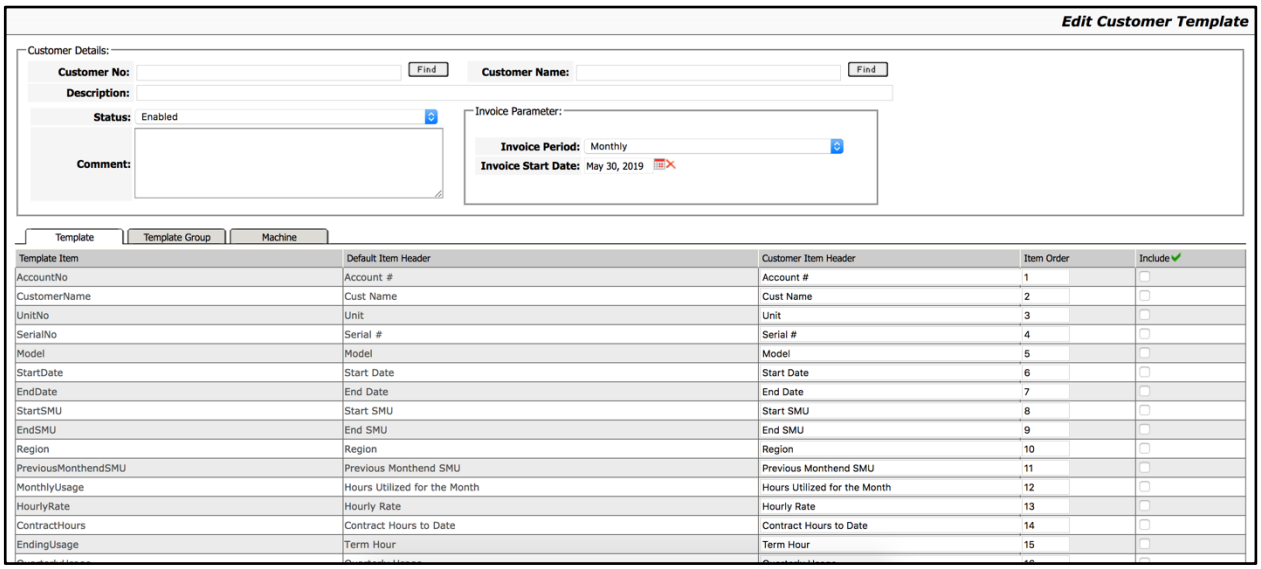


From this page you can do one of the following:

- Add a new template by clicking **[Add]**.
- Edit an existing template by clicking **[Edit]**.
- Delete a template by clicking **[Delete]**.

Clicking **[Add]** or **[Edit]** displays the Edit Customer Template page.



To attach the template to a customer, enter the customer number and name manually or use the **[Find]** buttons to search for the customer.

Enter a Description, Status, Invoice Parameter, and any Comments.

Template Tab:

The Template tab provides a list of the available attributes that can be displayed on the final invoice supporting document. From here you can:

- Choose the attributes to include.
    - Click in individual Include checkboxes, or click the green check mark to select or deselect all.
- Modify the column headers. Uptake provides a generic header, but you have the ability to modify them as needed.
- Modify the sort order. This determines the order in which the attributes will be displayed on the final invoice supporting Excel document.

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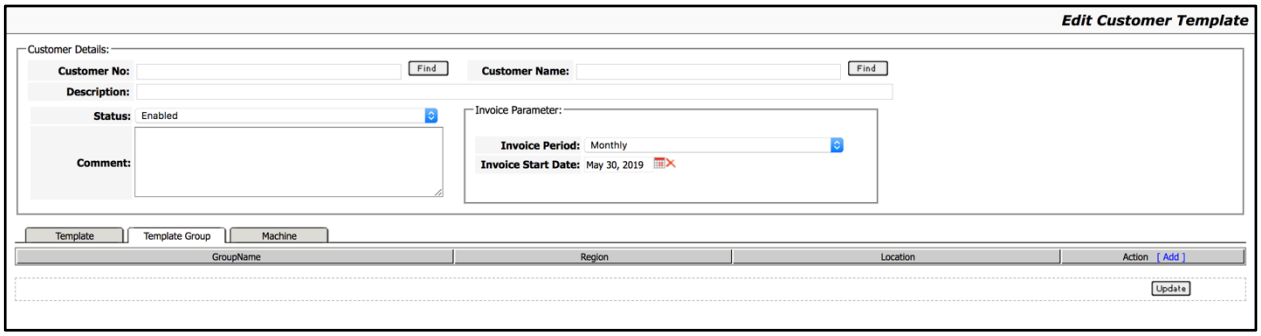
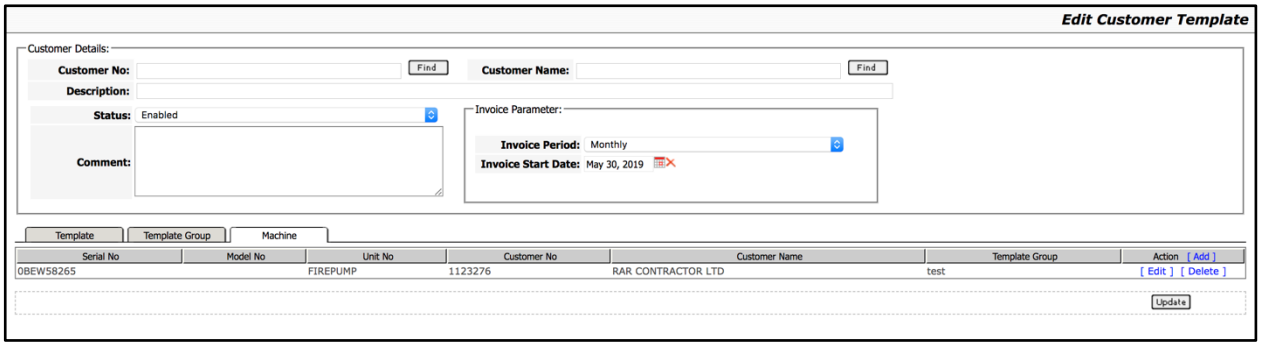
Template Group Tab:
The Template Group tab allows you to include one or more groups within a single invoice supporting Excel document.

NOTE: Each template must contain at least one group.



Click the **[Add]** button, enter a Group Name, Region, and Location, then click **[Add]** again.

Machine Tab:
The Machine tab allows you to associate one or more serial numbers to a template group.



To add a new serial number to the list:

1. Click **[Add]**.
2. Search for the serial number by Serial Number or Customer Number.
3. Click the checkbox next to the serial number, then click **[Select]**.

To set the Template Group:

1. Click **[Edit]**.
2. Select the Template Group from the drop-down menu.
3. Click **[Update]**.

To delete a serial number from the Template Group:

1. Click **[Delete]**.

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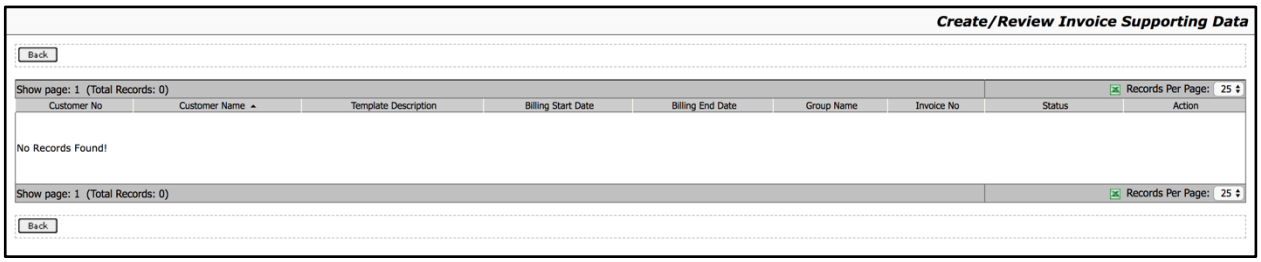
Generated Report:
Once the template is completed, the next step is to create an actual report. A separate report is created for each billing period based on the parameters entered in the Template Definition page.

The reports are generated automatically once one or more of the associated serial numbers have the Month End SMU set (using the Update Machines Month End SMU link on the dashboard).

Clicking the **Billing Support** link to display the list of generated reports.



Click **[Edit]** to display the details of the generated report. Here you can enter the customer purchase order, work order, and invoice. Within each group you can click on the **[Machine Link]** button to view the machines that are linked to the group, or click **[Machine Loaner]** to enter loaner machines.

Manage Groups and Group Contacts

Groups can be associated with a particular piece of equipment for different reasons, such as issue notifications. See the **Groups and Contacts** section for more information.

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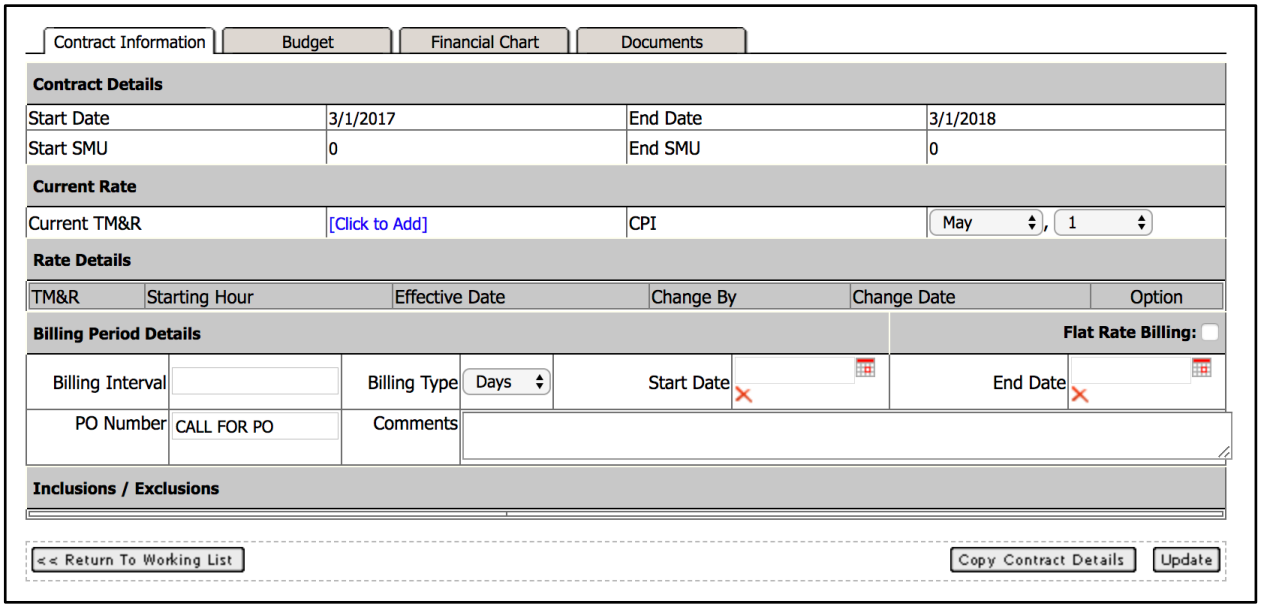
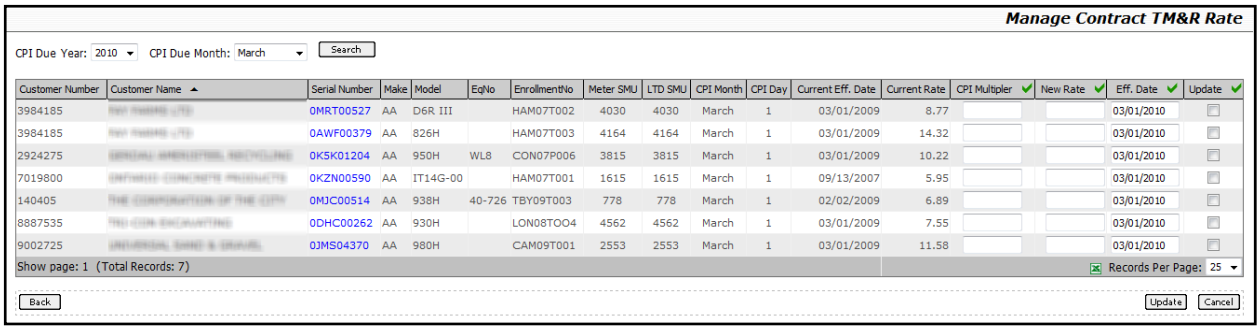
Manage Contract TM&R Rate

EMT has the ability to alert you when a contract is due for a yearly rate review. When and if the contract is due for yearly rate reviews are set up in the Contract Information Page.



Once the month and day are set, EMT will alert the user on the dashboard when a contract is due for a rate review.

The Manage Contract TM&R Rate page allows you to either enter a percent increase or manually type in the exact new rate. You can also manage the new rate's valid date range.



If the rate increase is the same for all the equipment shown:

1. Click the green arrow in the CPI Multiplier header.
2. Enter the percent increase. The same rate will be applied to all listed equipment.

If the effective date of the rate change is the same for all the equipment shown:

1. Click the green arrow in the Eff. Date header.
2. Enter the effective date. The effective date will then be set for all listed equipment.

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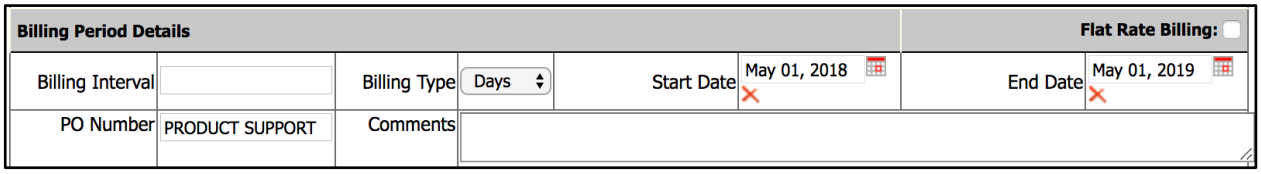
You can select which specific rates to update by clicking the Update checkbox. To include all items:

1. Click the green arrow in the Update header.
2. The first time the green arrow is selected it will select all items. The second time the green arrow is selected it will deselect all items.
3. Click **[Update]**.

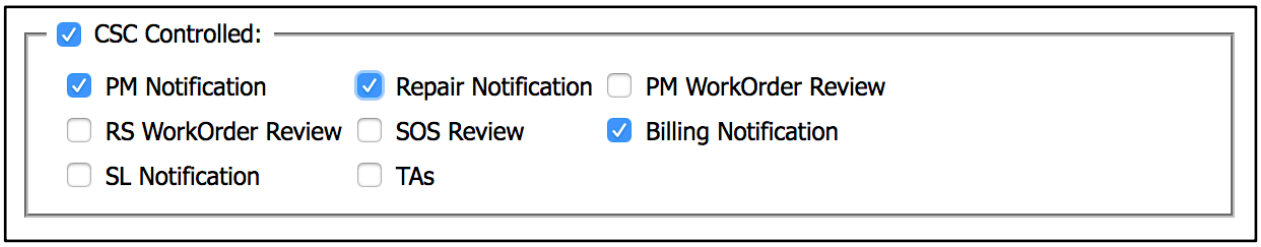
Manage Contract Billing Due

EMT has the ability to notify you when billing is due. There are two parts to this process:

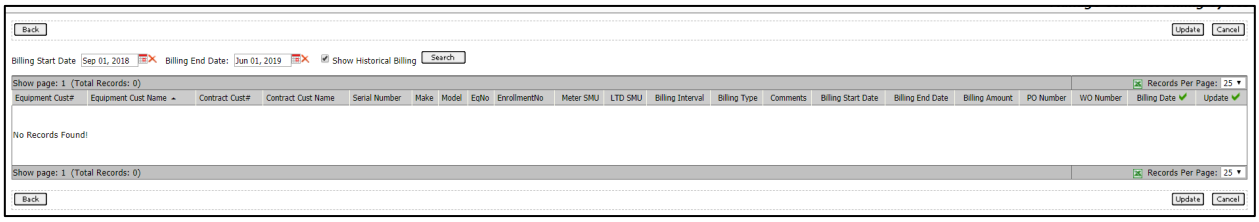
- Billing Notification Setup
  - Billing notification setup is done on the Contract Information page. Refer to the **Contract Information** section for more information.
  - Enabling billing notification for the machine is set in the Machine Information page.



  - Based on the billing parameters, EMT will notify you when billing is due for the equipment. You can set where on the dashboard you will be notified.



- Click on **Manage Contract Billing Due** to display the Manage Contract Billing Cycles page.



The Manage Contract Billing Cycles page:

- Displays all pending billings for the current month.
  - The start and end date can be changed to display a broader range.
- Click the Show Historical Billing checkbox to display any billing notifications that have already been updated as well as any outstanding items.
- The attributes of the billing period are displayed within the grid.

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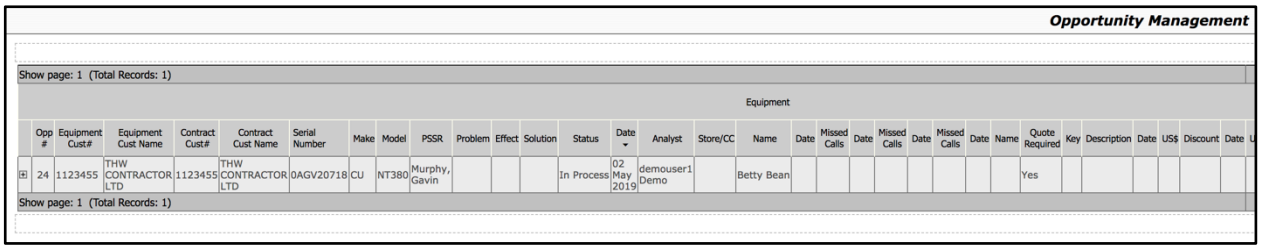
  - This information is managed in the Contract Information page.
- You have the option to enter a Work Order Number.
- Enter the date the billing was sent.
  - This can be done manually or for all items by clicking on the green arrow in the header and entering in the billing date for all items.
- Update the billing item by clicking the Update checkbox, this can be done manually for each item or by clicking on the green arrow in the header.
- Click **[Update]** to save the data.
- Once the billing notification is saved, EMT will alert you when the next billing period occurs.

Manage Opportunities

Click **Manage Opportunities** to display the Opportunity Management page. Here you can view details of all opportunities.



Click **[Edit]** to edit the details of an opportunity, or click **[Delete]** to delete an opportunity.

Add Opportunity:

1. Click **[Add]**. The Opportunity Detail Form will display.
2. Click **[Find Serial Number]**. A popup window allows you to search for a customer or piece of equipment.
3. Click the Select checkbox next to the customer or equipment you want to add an opportunity for, then click **[Select]**. The information for this customer or equipment will automatically be added to the form.
4. Enter all other required information into the form. You can also attach Quote Document and PO Document files.
5. Click **[Submit]** to create the opportunity, or **[Submit and Close]** to create the opportunity and close the Opportunity Detail Form window.

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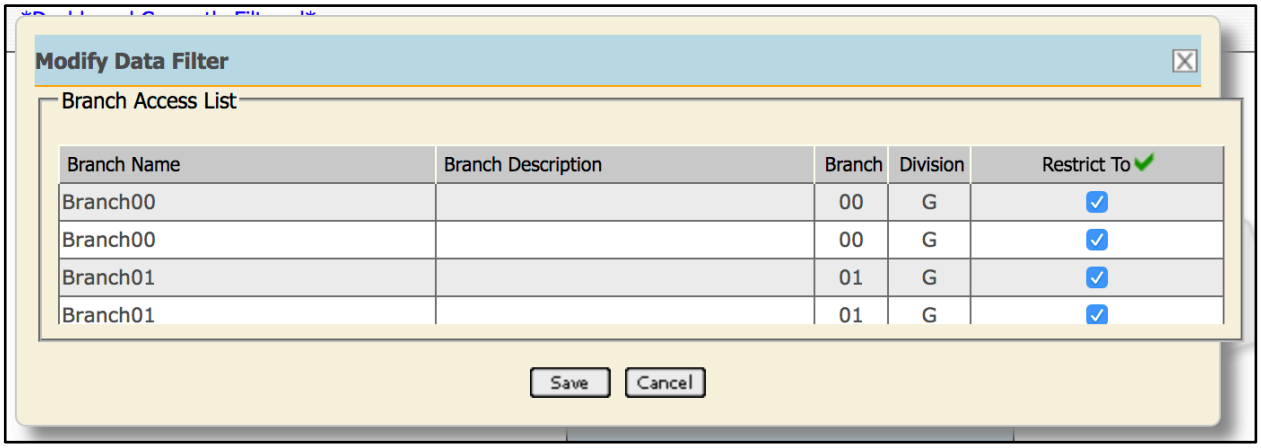
Modify Dashboard Filter

Modifying the dashboard filters relates to the branch that you would like to review. Select the box beside the branch filters that are to be applied to the numeric indicators on the Home page.



Click **[Save]**. The numbers on the dashboard will now only reflect the branches that are selected.

System Exceptions

Hover over the System Exceptions boxes to view what the number is indicating.

Machine Exceptions: Prevents system from successfully monitoring equipment. Machine Exceptions include:

- Equipment without Service Plan
  - Serial Number is being monitored by EMT but the Service Plan has not been set up.
- Custom registration isn't CSC controlled
  - A Custom subscription has been set up but the CSC Controlled flag has not been set.
- Last SMU Reading is less than Last PM Service SMU
  - The current SMU reading of the equipment is less than the SMU reading of the latest service.
- Less than or equal to 5 services remaining
- Billing Cycle not configured correctly (not all the billing details entered)
  - The serial number has been set to monitor billing due, but not all the billing parameters have been set on the Contract Information page.
- Service Events not set to the end of the contract (CEDTUG=2 By Hour)
  - There are not enough events to go to the end of the contract. This is based on contracts that end by hours.
- Service Events not set to the end of the contract (CEDTUG=1 By Date)
  - There are not enough events to go to the end of the contract. This is based on contracts that end by date.
- Service Events are created past the end of the contract (CEDTUG=2 By Hour)
- Service Events are created past the end of the contract (CEDTUG=1 By Date)

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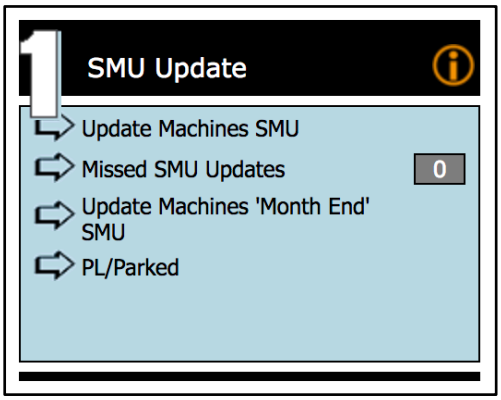
- Service Events not set to the end of the contract (CEDTUG=3 By Date or Hour)
- Service Events are created past the end of the contract (CEDTUG=3 By Date or Hour)
- Service SMU is Not Consistent with the Work Order SMU
- More than One Open CSA Contract

SMU Exceptions/Warnings: This number indicates equipment that has raised a flag during SMU retrieval from the Work Order System at the time of the work order closing.

Ownership Change/Ownership: If the contract owner or machine owner has changed in DBS it will appear in this list indicating that the information needs to be changed in EMT.

- On the Machine Information page, you have the ability to:
  - Sync the owning customer in EMT with the owning customer from DBS.
  - Sync the contract owning customer in EMT with the contract owning customer from DBS.
  - If the serial number is a custom subscription the contract owning customer can be manually entered.
    - A custom subscription is a serial number that does not have a CSA contract but EMT is still monitoring the equipment.

SMU Update



Valid SMU readings are important because EMT bases scheduling on the SMU readings. If the readings are not up to date then EMT will not be inaccurate when managing events.

This section and the SMU dropdown menu in the top navigation bar provide four links to the following functions.

Update Machines SMU

SMU from this page can be updated individually. To update an individual machine, use the search bar to locate the machine and enter the updated SMU reading in the New SMU Update box.

You can also update SMU readings by uploading an Excel file. Click **[Choose File]**, select your file, then click **[Upload]**.

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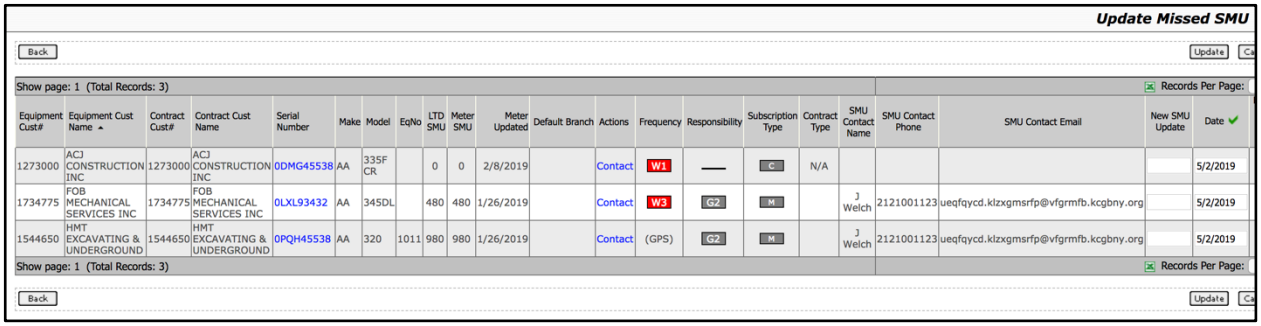
Missed SMU Updates



Update Missed SMU

Back Update

Show page: 1 (Total Records: 3) Records Per Page:

Equipment Cust#	Equipment Cust Name	Contract Cust#	Contract Cust Name	Serial Number	Make	Model	EqNo	LTD SMU	Meter SMU	Meter Updated	Default Branch	Actions	Frequency	Responsibility	Subscription Type	Contract Type	SMU Contact Name	SMU Contact Phone	SMU Contact Email	New SMU Update	Date
1273000	ACJ CONSTRUCTION INC	1273000	ACJ CONSTRUCTION INC	0DMG45538	AA	335F CR		0	0	2/8/2019		Contact	W1	—	C	N/A					5/2/2019
1734775	FOB MECHANICAL SERVICES INC	1734775	FOB MECHANICAL SERVICES INC	0LXL93432	AA	345DL		480	480	1/26/2019		Contact	W3	G2	M		J Welch	2121001123	ueqfqycd.klzxgmsrfp@vfgrmfb.kcgbny.org		5/2/2019
1544650	HMT EXCAVATING & UNDERGROUND	1544650	HMT EXCAVATING & UNDERGROUND	0PQH45538	AA	320	1011	980	980	1/26/2019		Contact	(GPS)	G2	M		J Welch	2121001123	ueqfqycd.klzxgmsrfp@vfgrmfb.kcgbny.org		5/2/2019

Show page: 1 (Total Records: 3) Records Per Page:

Back Update

This list is populated two ways: when a reading has not been received through Product Link in 7 days, or based on the SMU Update Frequency on the Machine Information page an SMU reading has not been received.

If the equipment has a Product Link unit the SMU Update Frequency is disabled and the last date the unit has reported is displayed.

If the Product Link unit has not reported within 7 days you will have the ability to change the SMU Update Frequency. This is required if the unit is removed from the equipment and SMU will be done manually.

Update Machines “Month End” SMU

This displays a list of machines and their Life to Date (LTD) and Meter SMU readings that require a SMU reading for month end. To set the reading as the SMU for the month end, click the check box at the end of the row and then click **[Update]**. This will remove the machine from the list.

Month end SMU readings are used to calculate the monthly usage of the machine. This is useful if the dealer is using the Invoice Supporting reports.

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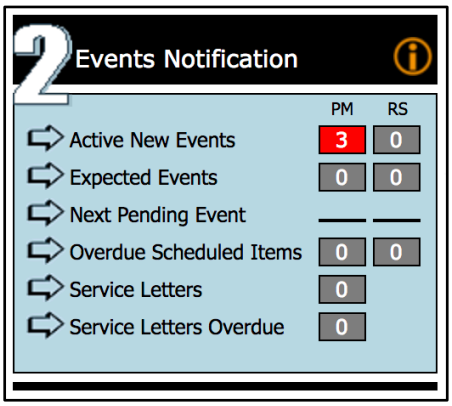
Events Notification



The Events Notification section displays events that have triggered a notification based on three types of services:

- PM (Preventative Maintenance)
- RS (Repair Service)
- SL (Service Letters)

The lists are populated based on the services indicated in the Machine Service tab of the Machine's page. The triggers are based on the Event Trigger set in the Additional Information section of the Machine Information tab.

Active New Events

Active events are services that are indicated in the Machine Service tab with a target SMU or target date that is on or within the Event Trigger.

For example, if the event trigger is set to 31 days and the next service date for the machine is within the 31 days, then the machine will appear in this list.

Expected Events

Expected events are services that are scheduled in the near future and are based on the target SMU or target date and the event trigger. The list is based on a date range that is calculated by the Event Trigger and the Service Date. A machine will appear on the list if the service date is double the trigger date to the trigger plus one.

For example, if the trigger is set to 30 days, the machine will show up on the list from 60 (double the trigger) days to 31 (trigger plus one) days before the service is due. Once the service is marked as Complete, it will be removed from the list. If not completed, it will appear in the Active New Events list because it is less than the trigger.

Next Pending Event

This list is the next event for all machines and is not based on any triggers. No numbers will appear in the boxes because they do not apply to these reports.

Overdue Scheduled Items

This list provides you with four links:

- **Serial Number**: Opens the machine Information page.
- **Follow-up**: View any follow-up communication made by email.
- **Action**: Sends an email to service department; when completed, the Follow-Up value will change to View.
- **Appt Status**: Opens a new window to the schedule from Service Scheduler.

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If the service date or SMU target is passed in the Service Scheduler appointment over 7 days, it alerts in EMT.

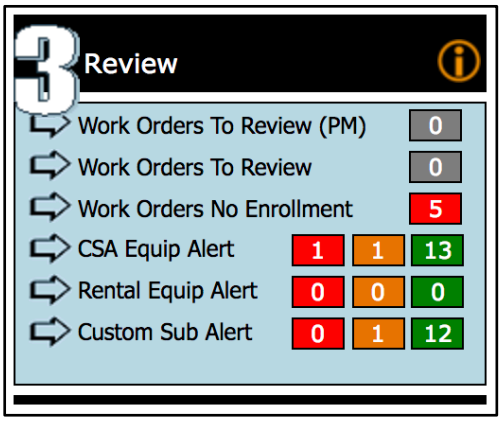
Service Letters

This list displays all open service letters in EMT. To schedule an open service letter, click the Schedule checkbox next to a service letter and then click **[Schedule]**. To cancel an open service letter, click the Cancel checkbox next to a service letter and then click **[Cancel]**.

Service Letters Overdue

This list displays all service letters that have been open for more than 7 days without any action taken on them.

Review

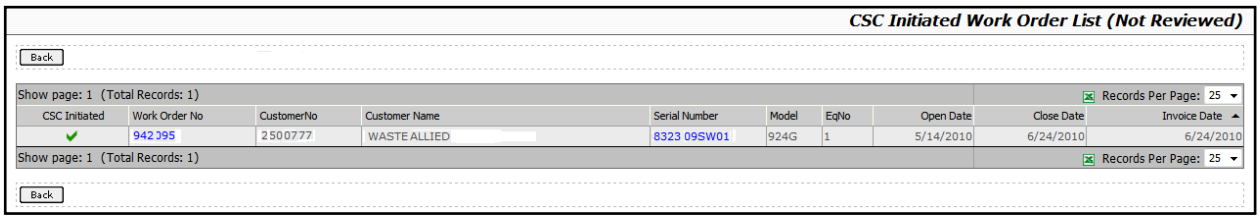


The Review section displays Work Orders, Product Link, and SOS™ notifications that require review. The boxes in grey indicate the number of work orders that require review.

The colored boxes indicate the number of machines that have sent a fault code or SOS™ exception based on three levels: Green (Level 1, notification), Yellow (Level 2, monitor situation) and Red (Level 3, immediate attention required).

Work Orders To Review (PM)

This list displays work orders that are CSC initiated. You can also access the Work Order details and the Machine Details from this page.



Select the Work Order number to review and approve all parts of the work order or just specific segments.

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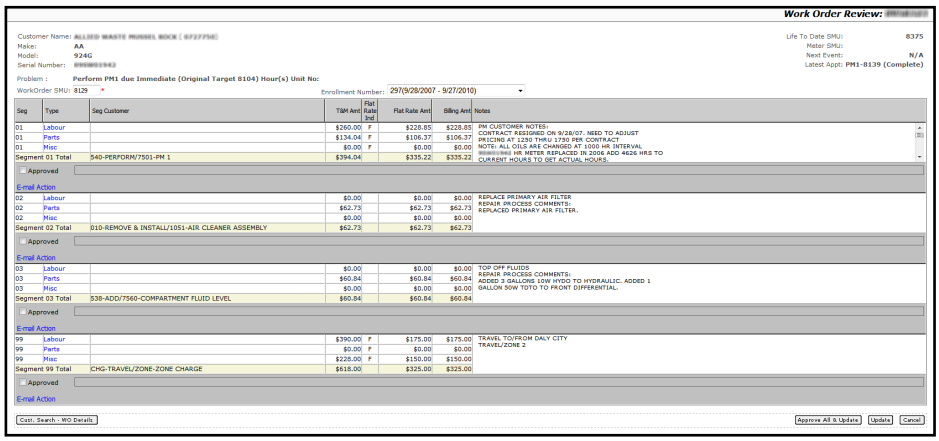

Each segment contains the following:

- Work Order SMU: The machine's SMU on the day of the work order.
- Enrollment Number: CSA contract number based on date ranges, hours; set to expire but will still be listed.
- Seg: segment number
- Type:
    - Labor: select to view more detailed information
    - Parts: select to view more detailed information
    - Misc.: select to view more detailed information
- Seg Customer: Customer that the segment belongs to; if blank then it belongs to the customer but may be assigned to dealership for warranty work.
- T&M Amt
- Flat Rate Ind: Flat rate indicator which will be F (flat rate) or blank (not flat rate).
- Flat Rate Amt
- Billing Amt
- Notes: Any notes entered by the tech.
- Segment Totals: Total amounts of the three types of billing.
- Approved box: Select this box to approve this segment.
- Email Action: Emails service people to say that the segment is not correct for a specified reason.

The following buttons that appear at the bottom of the page perform the following functions:
[Cust. Search – WO Details] – Different view of the WO.
[Approve All & Update] – Approve all of the segments and/or update SMU and enrollment number.
[Update] – Update SMU and enrollment number.
[Cancel] – Cancel any changes to SMU, enrollment number, or individual approved checkboxes; any segment(s) that has been approved previously will remain approved.

After the WO is approved it is removed from the Work Orders to Review list.

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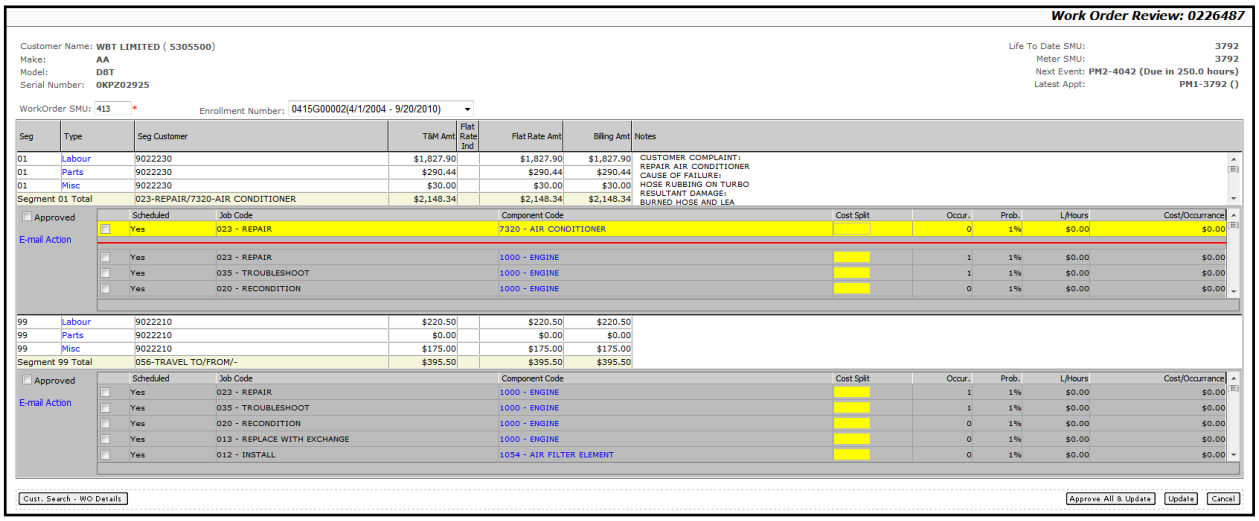
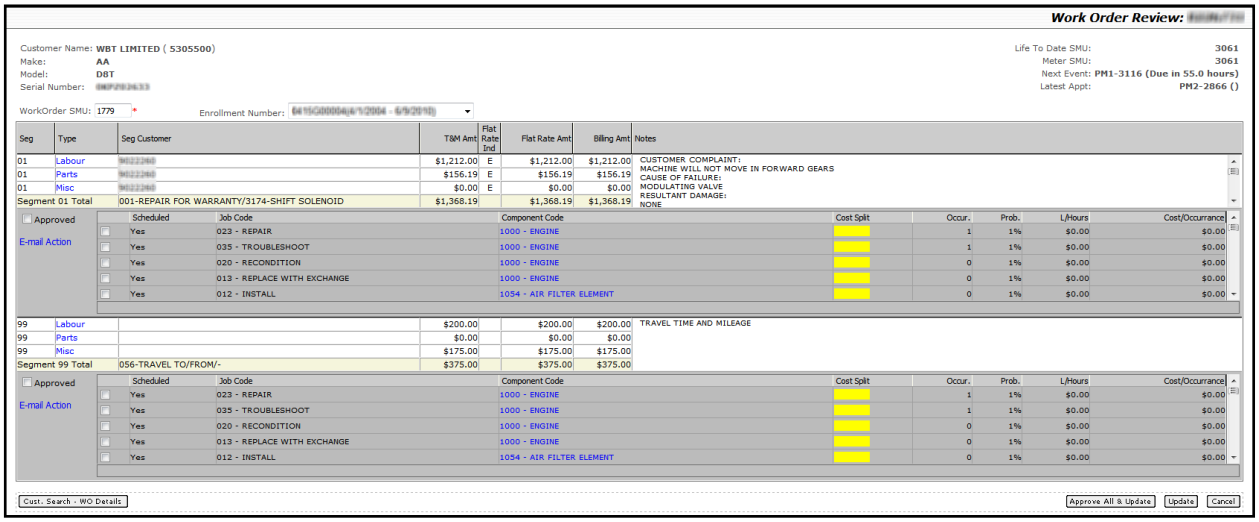
Work Orders to Review

After the calculator file has been imported it matches the work order job and component codes to the work order segments. If there is a direct match (job and component code) the whole row is highlighted yellow and is separated from the other by a red line. If only the job or component code match, it is not highlighted but still appears above the red line.

NOTE: EMT does not use the data but the cost split is still a workable option for dealers to use.



Cost split is taking a segment and matching it between multiple job component codes. To split a cost of a segment, check the box of the job and component code and enter the percentage in the cost split box.



Clicking the Approved box and then clicking the **[Update]** button will approve the segments that have been selected. The approved segments will be removed and the outstanding segments will remain. If all segments are approved, click the **[Approve All and Update]** button.

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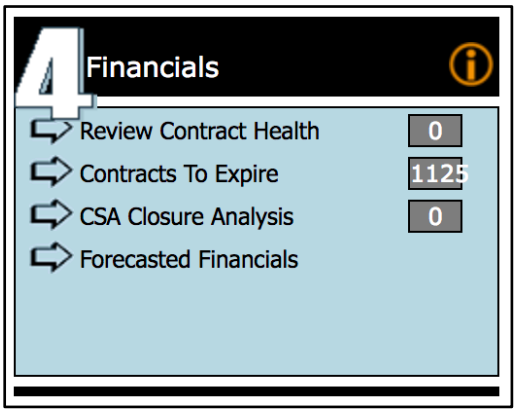
Work Orders No Enrollment

This list displays the same work order information as the other work order lists, however the equipment here is not currently enrolled in a CSA contract.

CSA Equip Alert / Rental Equip Alert / Custom Sub Alert

If your dealership also uses Uptake's Condition Monitoring application, clicking on any of these links will automatically open the application in a new tab. See the Condition Monitoring user guide for more information.

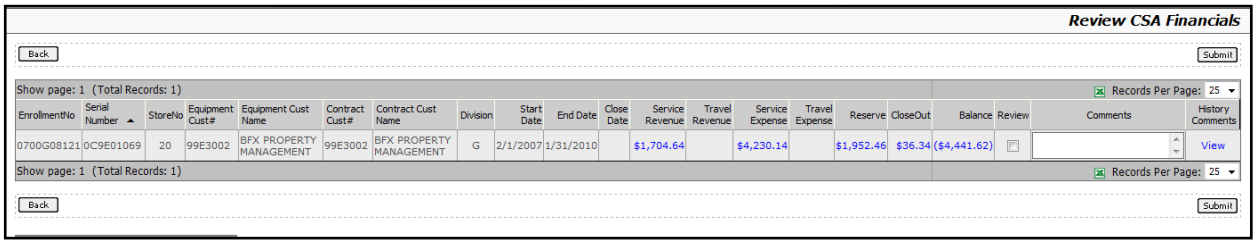
Financials



The Financials section displays alerts for current contracts, contracts that are about to close, and closed contracts. For active contracts, EMT also provides a report to forecast the end of contract variation.

Review Contract Health

This is a list of contracts that require review due to having a negative balance. This page can also display financial information at the individual serial number level.



Check the Review box and add comments, then click **[Submit]**. This removes the contract from this list and into the Equipment in Process list, where the contracts can be reviewed and marked as resolved.

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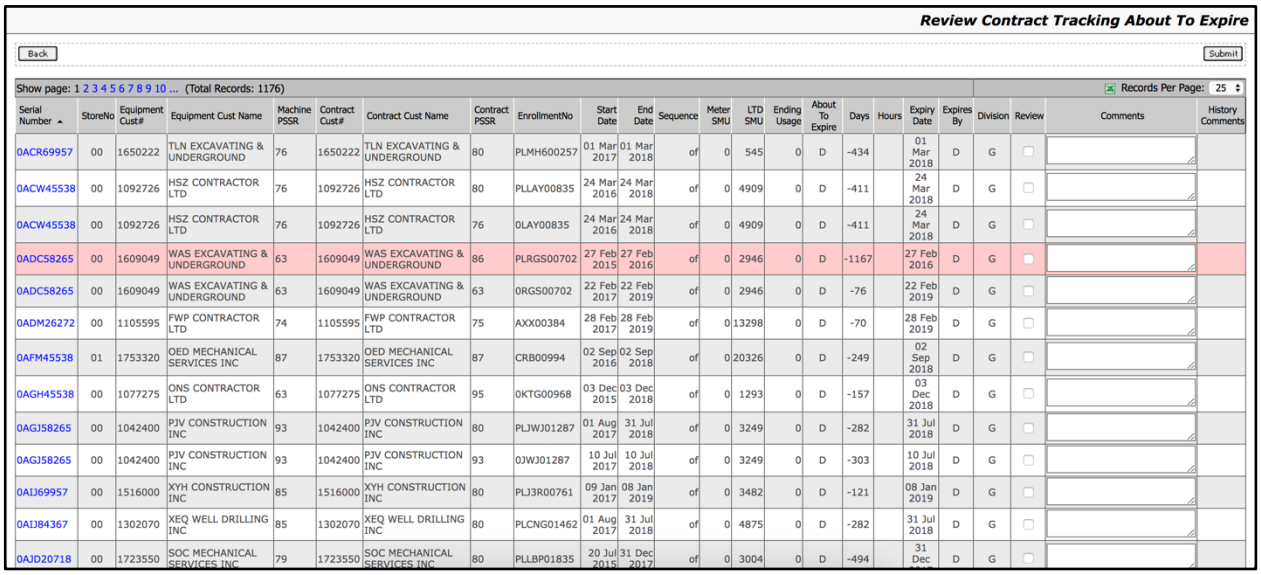
Contracts to Expire

This is a color-coded list of contracts that are about to expire based on their Expires By column. Red means the contract has already expired, grey means it is close to expiring, and white means there is still time until the contract expires.



Review Contract Tracking About To Expire

Back Submit

Show page: 1 2 3 4 5 6 7 8 9 10 ... (Total Records: 1176) Records Per Page: 25

Serial Number	StoreNo	Equipment Cust#	Equipment Cust Name	Machine PSSR	Contract Cust#	Contract Cust Name	Contract PSSR	EnrollmentNo	Start Date	End Date	Sequence	Meter SMU	LTD SMU	Ending Usage	About To Expire	Days	Hours	Expiry Date	Expires By	Division	Review	Comments	History Comments
0ACR69957	00	1650222	TLN EXCAVATING & UNDERGROUND	76	1650222	TLN EXCAVATING & UNDERGROUND	80	PLMH600257	01 Mar 2017	01 Mar 2018	of	0	545	0	D	-434		01 Mar 2018	D	G			
0ACW45538	00	1092726	HSZ CONTRACTOR LTD	76	1092726	HSZ CONTRACTOR LTD	80	PLLAY00835	24 Mar 2016	24 Mar 2018	of	0	4909	0	D	-411		24 Mar 2018	D	G			
0ACW45538	00	1092726	HSZ CONTRACTOR LTD	76	1092726	HSZ CONTRACTOR LTD	76	0LAY00835	24 Mar 2016	24 Mar 2018	of	0	4909	0	D	-411		24 Mar 2018	D	G			
0ADC58265	00	1609049	WAS EXCAVATING & UNDERGROUND	63	1609049	WAS EXCAVATING & UNDERGROUND	86	PLRGS00702	27 Feb 2015	27 Feb 2016	of	0	2946	0	D	-1167		27 Feb 2016	D	G			
0ADC58265	00	1609049	WAS EXCAVATING & UNDERGROUND	63	1609049	WAS EXCAVATING & UNDERGROUND	63	0RGS00702	22 Feb 2017	22 Feb 2019	of	0	2946	0	D	-76		22 Feb 2019	D	G			
0ADM26272	00	1105595	FWP CONTRACTOR LTD	74	1105595	FWP CONTRACTOR LTD	75	AXX00384	28 Feb 2017	28 Feb 2019	of	0	13298	0	D	-70		28 Feb 2019	D	G			
0AFM45538	01	1753320	OED MECHANICAL SERVICES INC	87	1753320	OED MECHANICAL SERVICES INC	87	CRB00994	02 Sep 2016	02 Sep 2018	of	0	20326	0	D	-249		02 Sep 2018	D	G			
0AGH45538	00	1077275	ONS CONTRACTOR LTD	63	1077275	ONS CONTRACTOR LTD	95	0KTG00968	03 Dec 2015	03 Dec 2018	of	0	1293	0	D	-157		03 Dec 2018	D	G			
0AGJ58265	00	1042400	PJV CONSTRUCTION INC	93	1042400	PJV CONSTRUCTION INC	80	PLJWJ01287	01 Aug 2017	31 Jul 2018	of	0	3249	0	D	-282		31 Jul 2018	D	G			
0AGJ58265	00	1042400	PJV CONSTRUCTION INC	93	1042400	PJV CONSTRUCTION INC	93	0JWJ01287	10 Jul 2017	10 Jul 2018	of	0	3249	0	D	-303		10 Jul 2018	D	G			
0AIJ69957	00	1516000	XYH CONSTRUCTION INC	85	1516000	XYH CONSTRUCTION INC	80	PLJ3R00761	09 Jan 2017	08 Jan 2019	of	0	3482	0	D	-121		08 Jan 2019	D	G			
0AIJ84367	00	1302070	XEQ WELL DRILLING INC	85	1302070	XEQ WELL DRILLING INC	80	PLCNG01462	01 Aug 2017	31 Jul 2018	of	0	4875	0	D	-282		31 Jul 2018	D	G			
0AJD20718	00	1723550	SOC MECHANICAL SERVICES INC	79	1723550	SOC MECHANICAL SERVICES INC	80	PLLBP01835	20 Jul 2015	31 Dec 2017	of	0	3004	0	D	-494		31 Dec	D	G			

To remove the contract from the list, review the information (including the History Comments) and click the box in the Resolve column. After selecting all contracts that have been resolved, click **[Submit]**.

CSA Closure Analysis

The purpose of this report is to show contracts that have closed but still have a balance. Based on this information the user can review the contract and request a closeout amount be applied to the contract.

Forecasted Financials

The forecasted financial report displays both the current financial health of the contract and the predicted health at the end of the contract.

The future revenue is calculated based on the remaining hours of the contract and the hourly usage rate. The future expense is calculated based on the remaining hours and contract budget data that was manually added to the Contract Information page or automatically created when the Calculator file was imported.

You also have the option to add comments and show that a reserve or closeout amount has been requested.

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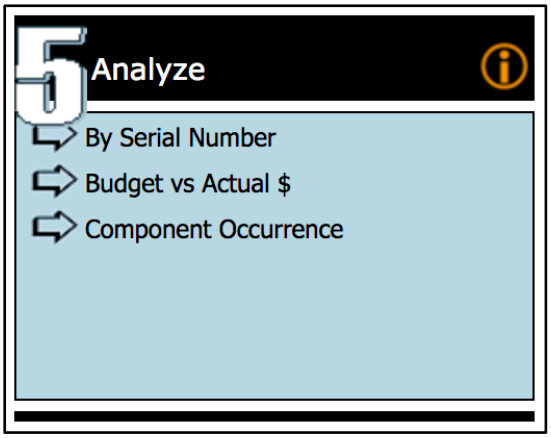
Analyze



The Analyze section provides the dealer with visibility into the component financial and service occurrence budget vs actual values.

The financial related reports display the budgeted and actual values at both a summary and detailed level. The summary level of the reports looks at component ranges (1000 Engine, 2000 Hydraulics etc.). The Detail level of the reports looks at the individual component codes for the selected range (Turbo Cartridge Housing, Exhaust Manifold etc.).

The budget amounts are taken from the CAT Calculator files that are imported into EMT and the actual amounts are taken from work order segments.

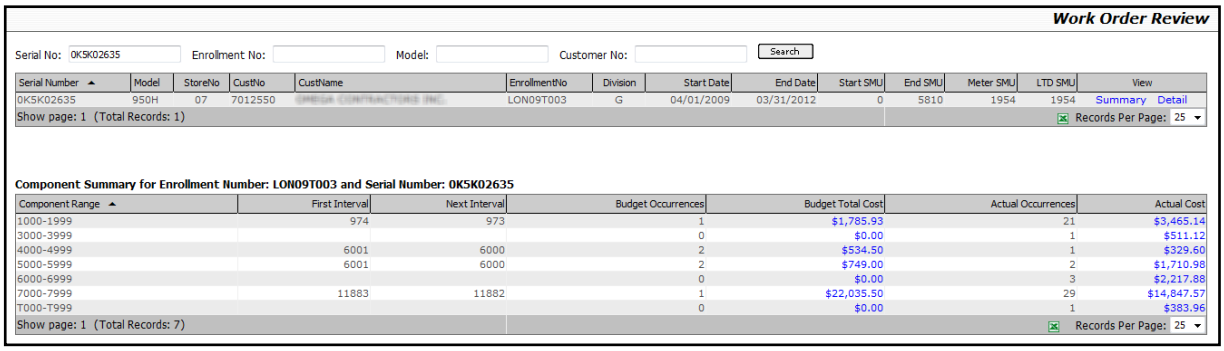
By Serial Number

This report shows the budget and actual amounts associated with component ranges (Summary) or individual components (Detail).

The report allows you to search using a combination of:

- Serial Number
- Enrollment Number
- Model
- Customer Number

Click on the summary link to display the Work Order Review Page.



Work Order Review

Serial No: 0K5K02635 Enrollment No: Model: Customer No: Search

Serial Number	Model	StoreNo	CustNo	CustName	EnrollmentNo	Division	Start Date	End Date	Start SMU	End SMU	Meter SMU	LTD SMU	View
0K5K02635	950H	07	7012550	[redacted]	LON09T003	G	04/01/2009	03/31/2012	0	5810	1954	1954	Summary Detail

Show page: 1 (Total Records: 1) Records Per Page: 25

Component Summary for Enrollment Number: LON09T003 and Serial Number: 0K5K02635

Component Range	First Interval	Next Interval	Budget Occurrences	Budget Total Cost	Actual Occurrences	Actual Cost
1000-1999	974	973	1	$1,785.93	21	$3,465.14
3000-3999			0	$0.00	1	$511.12
4000-4999	6001	6000	2	$534.50	1	$329.60
5000-5999	6001	6000	2	$749.00	2	$1,710.98
6000-6999			0	$0.00	3	$2,217.88
7000-7999	11883	11882	1	$22,035.50	29	$14,847.57
T000-T999			0	$0.00	1	$383.96

Show page: 1 (Total Records: 7) Records Per Page: 25

Field Definitions:

- **Component Range**: Grouping of Component codes.
- **First Interval**: The SMU when the first event occurred in this component range.
- **Next Interval**: The SMU when the next event occurred in this component range.

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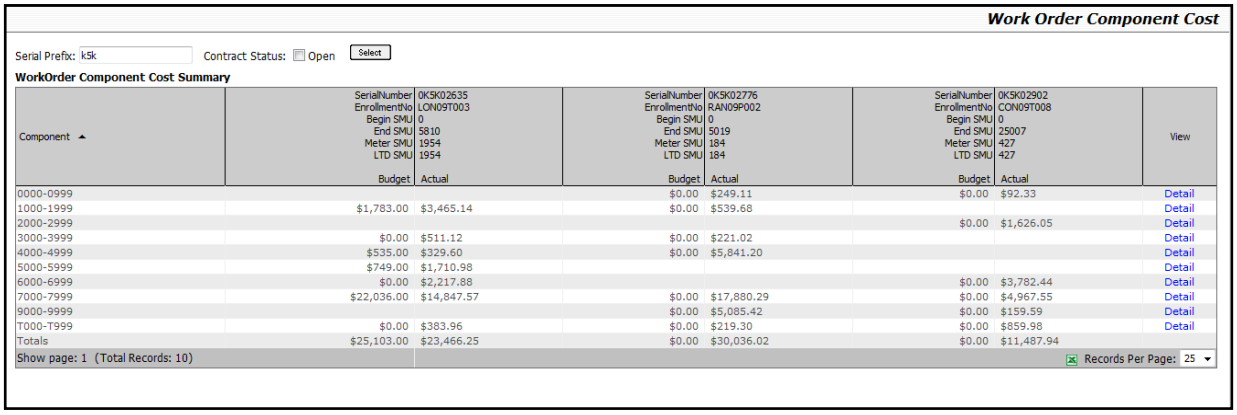
- **Budget Occurrences**: Based on the CAT Calculator file that was imported to EMT; how many events in this component range that were budgeted to occur.
- **Budget Total Cost**: Based on the contract amounts that were imported into EMT from CAT Calculator.
- **Actual Occurrences**: Based on work order segments; how many occurrences of this range of events occurred.
- **Actual Cost**: Based on work order segments; the total amount for this component range.

Click the **[Detail]** button to display the budget and actual values for individual components. From here you can click on **[Budget Cost]** or **[Actual Cost]** to view more detailed information.

Budget vs Actual $

The Budget vs Actual $ report is an extension of the By Serial Number report, displaying the same data but allowing the user to compare up to 5 serial numbers at the same time. This report has the same summary and detail view, displaying budget and actual amounts.

Use the Search fields at the top of the page to search by serial number, contract number, and contract status, then select up to 5 different serial number/enrollment number combinations. Click **[OK]**.



This portion of the report shows the comparison between budget and actual amounts for component ranges. Details relating to the serial number are displayed in the header of each serial number.

The budget information relates to the CAT Calculator data that is imported into EMT, and the actual information is related to the work order segments.

Click **[Detail]** to display the budget and actual amounts for individual components within the selected component range.

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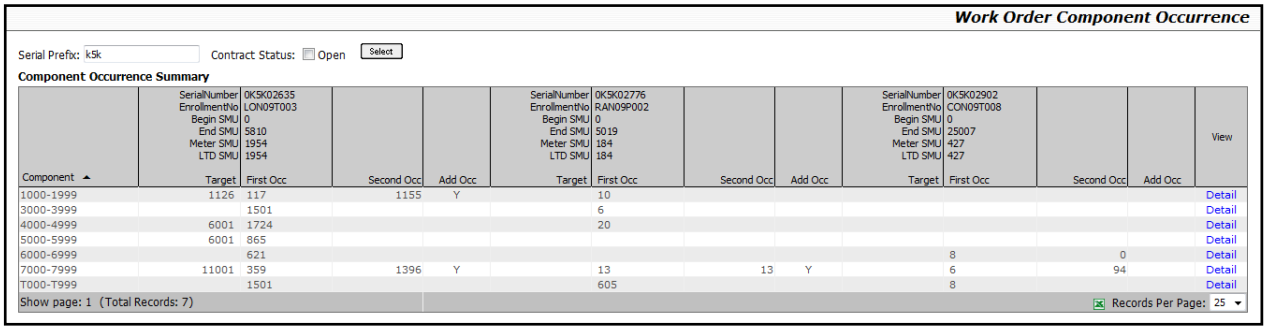
Component Occurrence

The Component Occurrence report is similar to the Budget vs Actual $ report, except instead of showing budget and actual amounts it displays the budget and actual occurrences of events related to component ranges or specific components.

Use the Search fields at the top of the page to search by serial number, contract number, and contract status, then select up to 5 different serial number/enrollment number combinations. Click **[OK]**.



The Target column displays the first occurrence of an event in the component range for each serial number. This information is imported from CAT's Calculator into EMT.

The First Occ. and Second Occ. columns display when the first and second occurrence occurred in this component range. This information is based on work order segments.

The Add Occ column displays when at least a third occurrence has occurred based on the work order segments.

Click **[Detail]** to display a list of the occurrences based on each individual component code.

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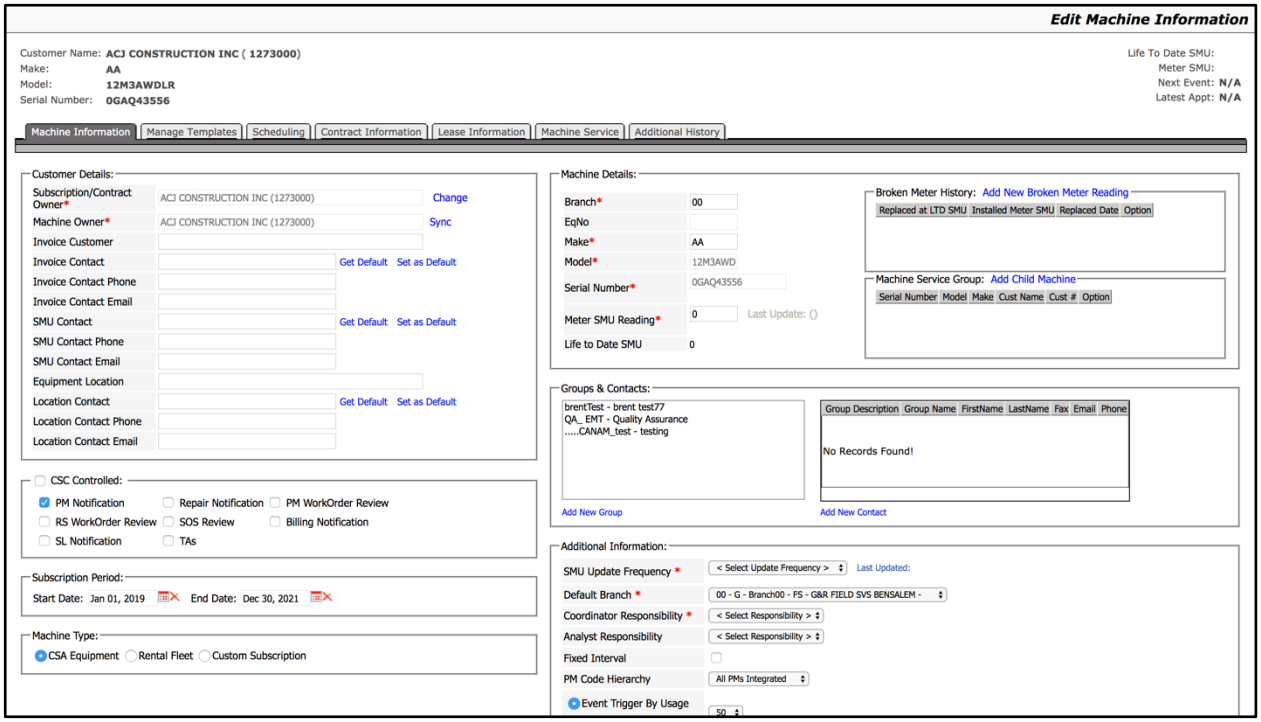
EQUIPMENT TABS

Machine Information



The Machine Information tab gives you the ability to configure attributes that are needed by EMT:

- Define contact information for
  - Invoice contacts
  - SMU contacts
  - Location contacts
- Machine Details
- The processes that EMT will monitor
  - PM notification
  - Repair Notification
  - PM work order review
  - RS work order review
  - SOS™ review
  - Billing Notification
- Subscription Period
- Type of machine
- Group contacts
- Broken hour meter entries
- Parent/child relationships
- How often EMT is expecting SMU updates
- Default branch that is responsible for the service
- Fixed or sliding interval

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- Event triggers

Customer Details

The Customer Details section stores various types of contact information that will be used throughout the life of the contract:

- Contacts for Invoice questions
- Contacts for SMU questions
- Contacts for the equipment location
    - This information is used when creating appointments to populate the contact information.

The owner of the equipment and the owner of the contract are also displayed. If these are different, EMT will allow the user to sync the data from DBS.

CSC Controlled

This section controls which processes EMT will monitor for the equipment. In order for EMT to monitor the processes, the CSC Controlled checkbox has to be checked as well. The processes are:

- PM Notification
    - Display upcoming PM events in Box 2.
    - PM events are defined in the Manage Template page and applied to the machine in the Scheduling page.
- Repair Notification
    - Display upcoming repair services in Box 2.
    - These events are normally tied to a TM&R or Marc contract and imported from a Calculator file.
- PM Work Order Review
    - Allows you to review work orders that have been closed and are linked to PM events that originated from EMT. This is done in Box 3.
- RS Work Order Review
    - Allows you to review work orders that are linked to the serial number but are not linked to PM Events that originated from EMT. This is done in Box 3.
- SOS™ Review
    - Allows you to review SOS™ results in Box 3.
- Billing Notification
    - Allows you to track when billing is due for the serial number.
    - The billing periods and amounts are set up in the Contract Information page.
    - The billing notifications are displayed in the Shortcuts on the EMT dashboard.

Subscription Period

The subscription period is used to define the start and end date that EMT will monitor the equipment.

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Machine Type

EMT has the ability to also manage other types of machines that don't have a CSA Contract.

- CSA Equipment
  - Equipment has an CSA contract.
- Rental Fleet
  - The equipment is rental.
- Custom Subscription
  - Equipment that does not have a CSA contract.
    - This can be used when you want to use EMT to notify Billing, Work Order to review, and SOS™ results to review.

Machine Details

Most of this information is brought in from DBS, except for the Meter SMU Reading. The SMU reading is automatically set if the equipment is configured with a Product Link unit. You can also enter the SMU reading manually.

Broken Meter History

EMT has the ability to track when SMU meters are replaced. This allows a meter to be replaced on the equipment while EMT continues to schedule appointments according to the life to date SMU reading on the equipment.

Machine Service Group

The Machine Service Group allows you to link equipment together for scheduling events. This feature is meant to be used for power systems; if a site has several generators that are on the same event schedule, event templates can be assigned to the parent machine. Then as events are scheduled the child machines are scheduled at the same time.

Groups & Contacts

Select the appropriate group from the list and then click the **[Update]** button at the bottom right of the screen.

Add New Group

To add a new group of contacts:

1. Click **[Add New Group]**. You will be taken to the Manage Group page.
2. Click **[Add New Group]**, then enter all necessary information.
3. Click **[Update]**. If the new group is a child of another group of contacts, choose the parent group from the drop-down menu.

Add New Contact

To add a contact:

1. Click **[Add New Contact]**. You will be taken to the Manage Contacts page.
2. Enter the new contact information into the form at the right of the page.
3. Click **[Update]**.

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NOTE: Contacts can only be associated with one parent group.

Additional Information

The Additional Information section allows you to define attributes that are used in EMT to manage the various events.

- **SMU Update Frequency**: Indicates how often the SMU should be updated for the machine. It will be indicated by Day (D plus *num)*, Week (W plus *num)* or Month (M plus *num)*.
- **Default Branch**: The default cost center that will manage the service for this machine. When it is scheduled for service in the Service Schedule, it will use this as the cost center.
- **Responsibility Indicator**: Used as an indicator to show which person in the CSC group is responsible for the equipment.
- **PM Code Hierarchy**: EMT has the ability to define multiple PM Code hierarchies.
- **Fixed/Sliding Interval**: When configuring a machine you can choose between fixed or sliding interval scheduling services.
    - Fixed Interval: Services are scheduled based on the original template targets. If a new machine is set up to do services at the following SMU 250, 500, 750, 1000 etc., but the 250-hour service was actually done at 300 hours, EMT will trigger the next event at 500 hours.
    - Sliding Interval: Services are scheduled based on the original template intervals. If a new machine is set up to do services at the following SMU 250, 500, 750, 100 etc., but the 250-hour service was actually done at 300 hours, EMT will trigger the next event at 550 hours, 250 hours after the prior service.
- **Event Trigger by Usage**: Setting the event trigger by usage controls how many hours before a service is due it's displayed in the Box 2 Active New Events. If a service is due at 1250 hours and the event trigger is set to 50, the event will not be displayed until the equipment has 1200 hours or more.
- **Event Trigger by Days**: Setting the event trigger by days controls how many days before an event EMT will display it in Box 2 Active New Events. Event trigger by days can be used on equipment that schedules events either by hours or days.

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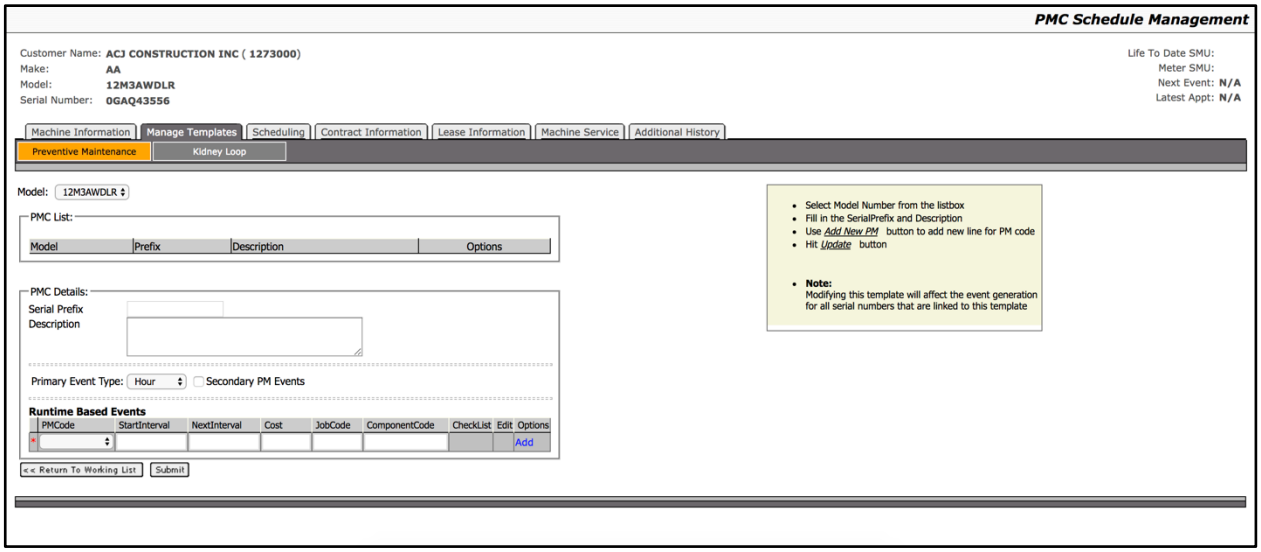
Manage Templates



Preventive Maintenance

PM templates are associated to an equipment model. Each model can have one or more templates defined.

- Primary Event Type: Event types can be Hours, Days, Weeks, Months, or Years.
- Secondary Events: Option to add additional events to the template. Secondary events are free text events that can be scheduled by Hours, Days, Weeks, Months, or Years. It does not matter what the Primary Event Type is set to.
    - Secondary events can be associated to a primary event. This means the secondary event will only be scheduled when the primary event is due.
- Runtime Based Events: The PM Code is associated with a start and next interval. You can also define the cost, job code, component code, and attach a checklist.

Kidney Loop

Kidney looping is the process of recycling fluids to be reused in machines. Kidney loop templates are associated with an equipment model. Each model can have one or more kidney loop templates.

Kidney loop templates allow you to choose which compartments to include in the kidney loop events, the intervals to perform them, and when to do the oil change event. Kidney loop events can also be associated to a PM event.

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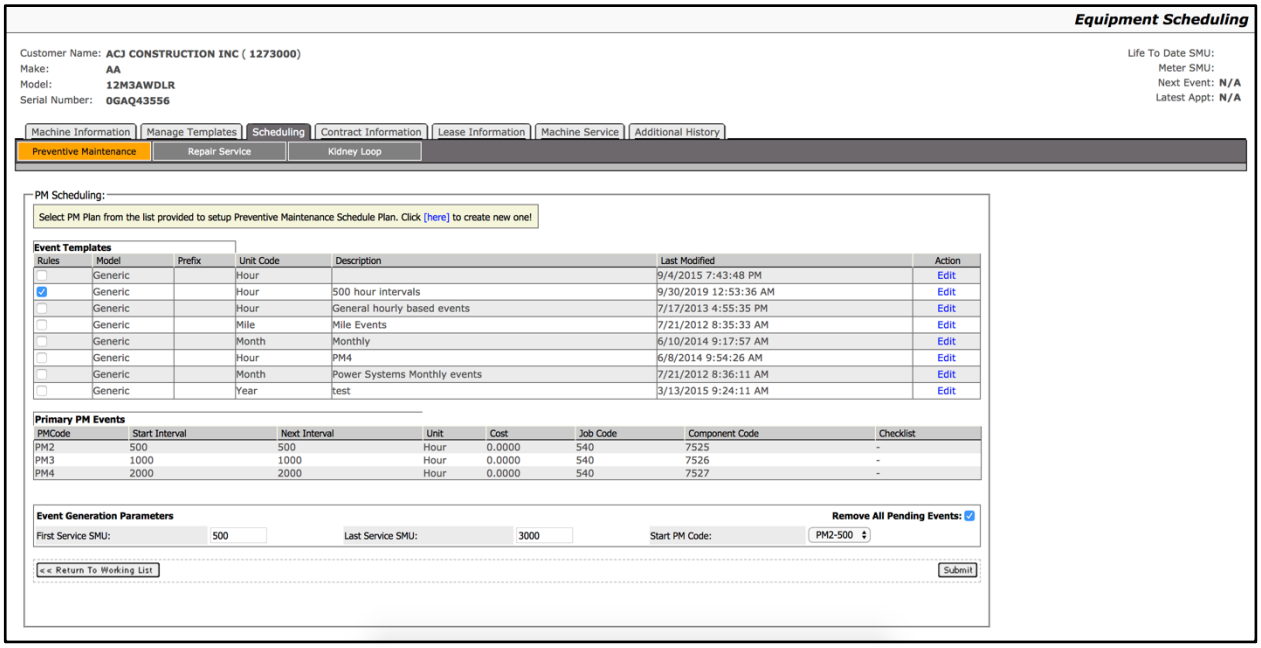
Scheduling



Preventive Maintenance

Once a PM plan is selected from the Manage Templates tab event generation parameters will automatically be added, and are based on days and primary and secondary PM events intervals.

Latest events are ones that are already completed and can include work orders. They are used as a guideline when creating a new contract. If there were completed events, you may want to start the contract on a different date based on what was already completed.

Click **[Edit]** to edit the template. This will apply to all models associated with that template.

Repair Service

Repair Services can be imported into EMT in several ways:

- Import data from CAT's Calculator.
- Import data from an Excel file.
- Import from generic templates.
- Copy events from a different serial number.

NOTE: The import methods shown on this page are configurable.

Kidney Loop

This page gives you the ability to schedule kidney looping services for the machine.

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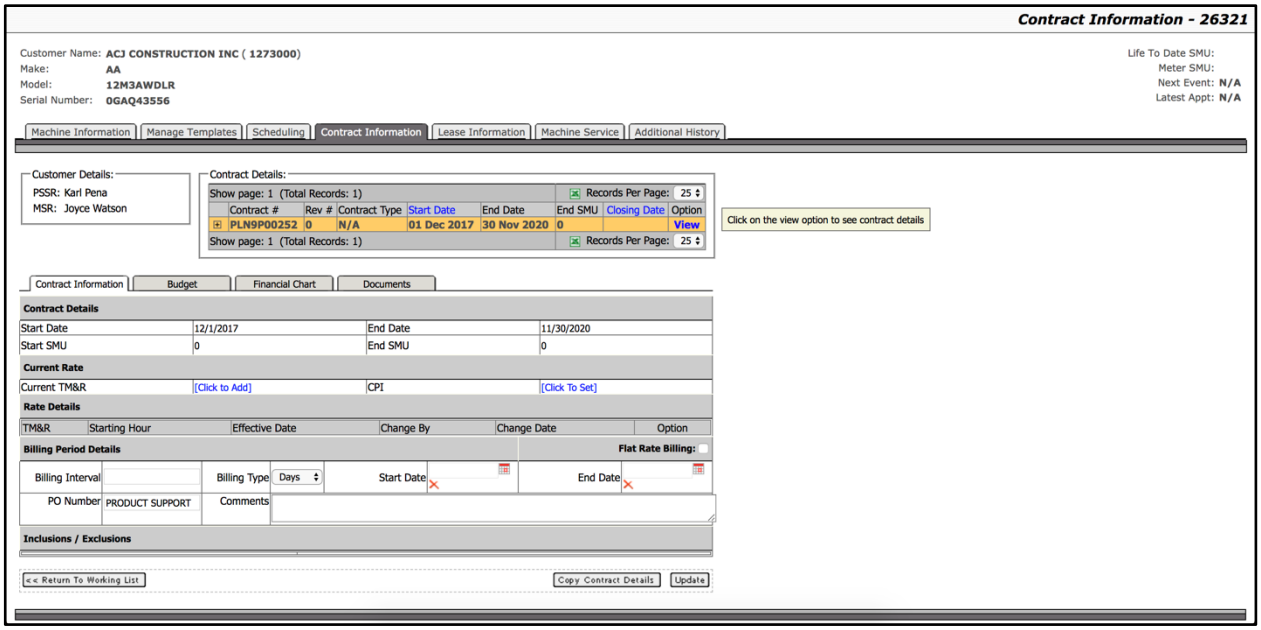
Contract Information



The Contract Information page shows a list of all current and past contracts that have been assigned to the current serial number.

For each contract the following details can be viewed:

- Contract Terms

For each contract the following details can be managed:

- Contract rates for the entire contract
- Billing period details
- Contract Inclusions
- Contract Exclusions
- Scanned images of the registration, contract and builder file

Contract Details
This section displays the contract start and end terms.

Current Rate
This section displays the current rate of the contract. EMT has the ability to track the rate over the life of the contract.

You can also set the month and date when rate of the contract can be adjusted. When the contract rate is due for an increase, the user will be alerted on the EMT dashboard. EMT will trigger an alert for a rate increase when the CPI month and day have passed and no new rate has been entered.

Rate Details
This section displays all the rates that are associated with this contract.

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Billing Period Details
The billing period tracks when billing is due for this contract. This functionality is meant to notify the dealer when billing is due to prevent invoices that are either missed or sent out late. Edit the information in the Billing Period Details fields as needed.

When a contract is due for billing you will be notified on the EMT dashboard.

Once the billing period details have been entered the Billing Notification has to be enabled on the Machine Information page.

NOTE: This functionality does not issue the actual invoice.

Inclusions / Exclusions
This section defines what is and is not included in the contract.

Budget

The budget page allows you to enter the budgeted revenue and expenses. The data can be entered manually or populated based on the import of Calculator files.

Budgets can be broken into different periods:

- Divide the contract length into a set number of periods.
- Divide the budget into periods based on a number of hours.
- Divide the budget into periods based on a number of months.

The data entered into the budget is displayed in various places throughout EMT, including the contract health charts that appear in the Contract Information page and the Create Appointment page.

Financial Chart

The financial chart page displays the current budget and actual revenue and expenses for the serial number. This provides you with a quick summary of the performance of the contract.

Documents

The documents page allows you to upload documents to the contract. This keeps the details of the contract stored in one location.

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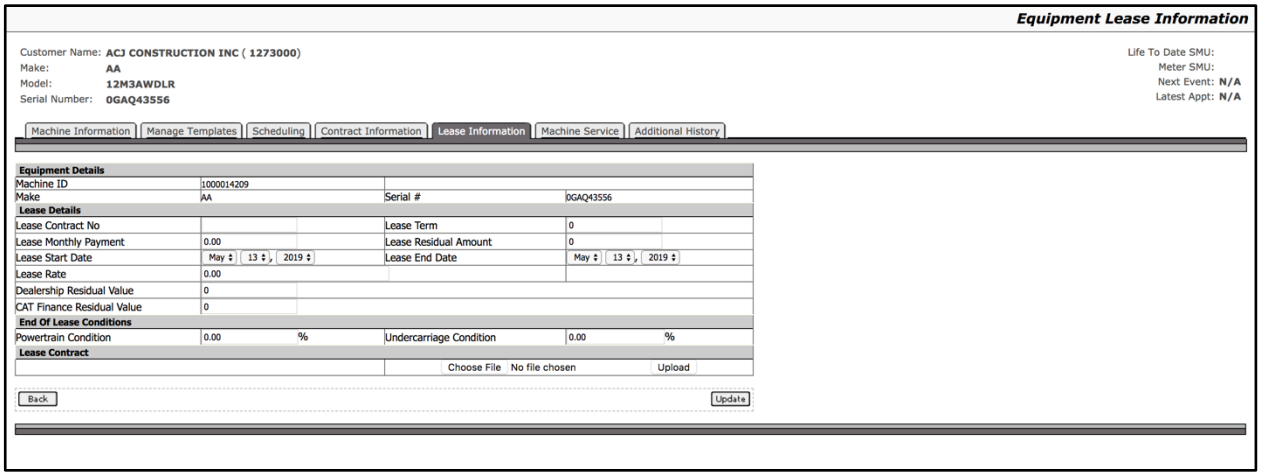
Lease Information



If the equipment is leased, the lease information is manually entered into this tab.

Equipment Details
Make – two-digit DBS code.
Serial # – serial number of unit.

Lease Details
Lease Contract No
Lease Term
Lease Monthly Payment
Lease Residual Amount
Lease Start Date
Lease End Date
Lease Rate
Dealership Residual Value
CAT Finance Residual Value

End of Lease Conditions
Powertrain Condition – Percent of usage remaining when equipment is returned.
Undercarriage Condition – Percent of usage remaining when equipment is returned.

Lease Contract
You can upload files to support the contract, such as a scanned copy of the signed lease agreement.

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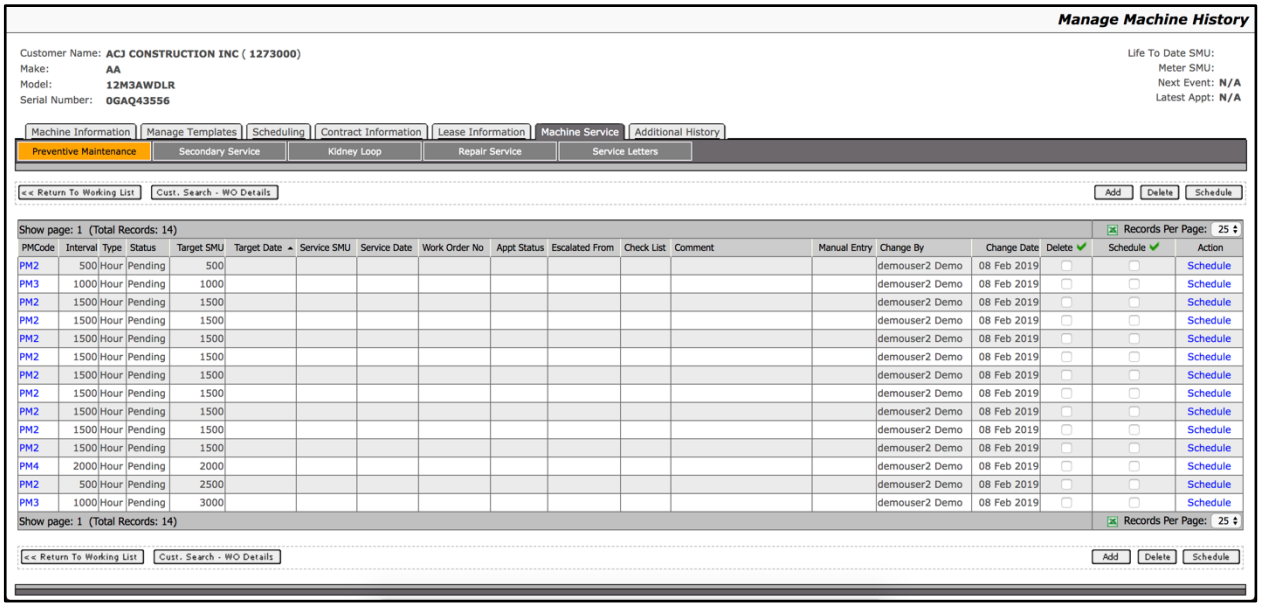
Machine Service



Preventive Maintenance

This section details a list of services that are part of the recommended Preventive Maintenance routine. An icon will indicate if a service was escalated ( ) or is pending a SMU sync ( ) with Service Scheduler and/or related Work Orders.

Selecting the PM code in the first column allows you to edit the service record:

Event Details

- Event: Using the drop-down menu, choose the code that the event represents.
- Event Type: Hours, days, weeks, or months and is based on the template created for the event.
- Status: Select the status of this particular event.
- Checklist: Populated with checklists created for the specific model.
- Comment: Any additional comments about the event.

Target Details

- Target Meter: Enter the life-to-date SMU which this service should be done by.
- Target Date: Enter the date SMU which this service should be done by.

Appointment Details (completed in service scheduler and syncs with EMT)

- Service Meter: The SMU reading when the service is completed.
- Service Date: Date of the service.
- Work Order No: Work order that was created from the service.
- Segment No: Enter segment number if a particular segment of the work order applies.

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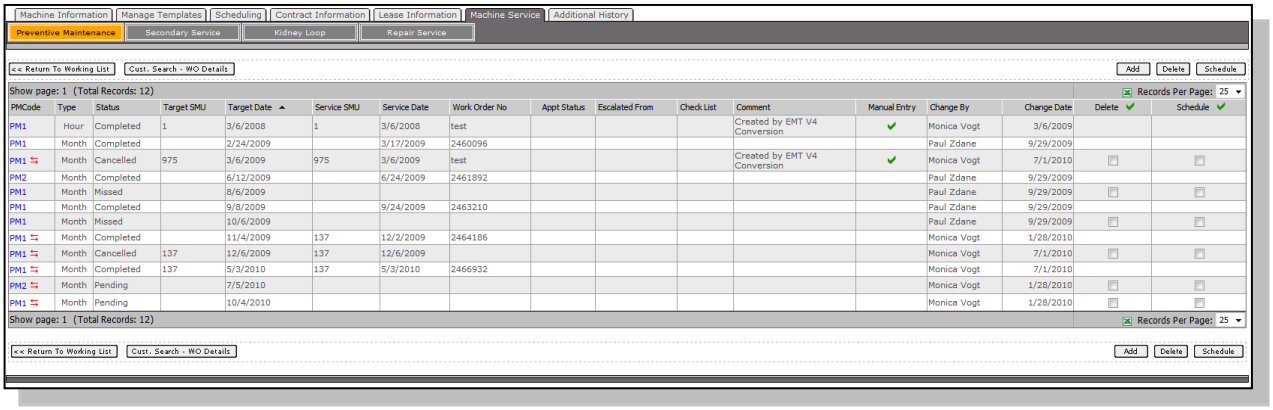
Current Meter Reading: Pulled in through Product Link or manually entered when SMU is updated.



Add – The **[Add]** button provides the same fields as when you edit an existing service type.

Delete – The **[Delete]** button gives you the option to delete any or all of the scheduled services.

Schedule – To bulk schedule one or more items, click the Schedule checkbox and then click **[Schedule]**. This will send all the selected items to the Service Scheduler.

Secondary Service

The Secondary Service page displays a list of secondary events that have been generated for the serial number. This list will display both events that have been completed and events that are still pending.

Secondary events can be deleted by clicking the Delete checkbox and then clicking the **[Delete]** button.

Secondary events can be modified by clicking on the Description link.

Kidney Loop

The Kidney Loop page displays a list of kidney loops associated with the asset serial number.

Kidney loops can be deleted by clicking the Delete checkbox and then clicking the **[Delete]** button.

Kidney loops can be modified by clicking on the Compartment link.

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Repair Service

The Repair Service page displays a list of repair service events that have been generated for the serial number. This list will display both events that have been completed and events that are still pending.

Repair service events can be deleted by clicking the Delete checkbox and then clicking the **[Delete]** button.

Repair Service events can be modified by clicking on the Job Code Description link.

To schedule an event, click the Schedule checkbox and then click **[Schedule]**.

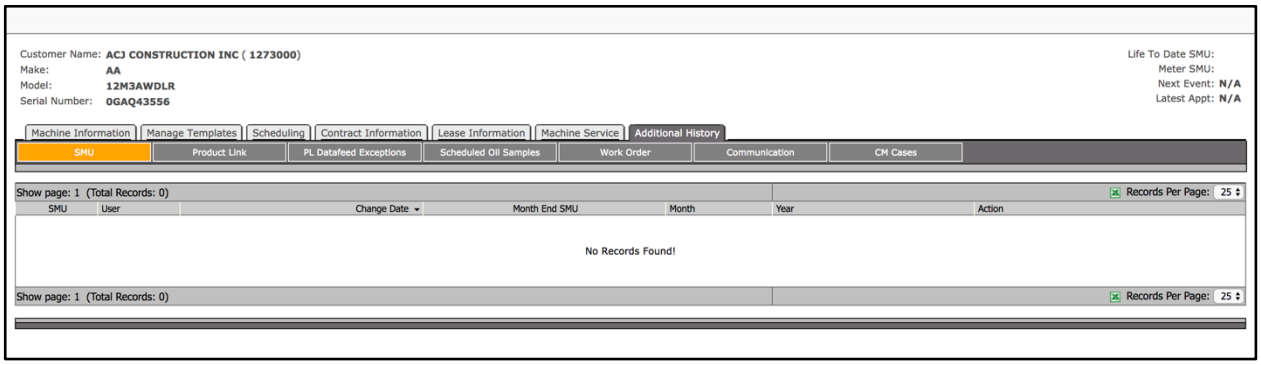
Service Letters

The Service Letters page displays a list of service letters associated with the serial number.

Click on the PIPNo link to edit the service record.

To schedule a service event, click the Schedule checkbox and then click **[Schedule]**.

Additional History



This section displays important information regarding the machine's history. History can play an important part in determining when and if a machine requires a particular service, product parts, etc.

SMU

SMU is entered manually or through Product Link. The histories of the entries are listed here.

To set the SMU reading, click the box below Month End SMU and then click **[Set]**.

To delete the reading, click **[Delete]**.

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Product Link

The Product Link section provides a history of the fault codes sent by the equipment and displays the following information:

- Module: Module the fault was detected on.
- Level: Severity level.
- Occurrence: How many times this fault code has occurred.
- Event: The PL event that is recorded.
- Component: The component on the equipment that the event occurred.
- Event Date: The date the event happened.
- 30/60/90: How many times the event has happened in the last 30, 60, or 90 days.
- Resolved: Through the review process in Box 3 of the dashboard.

Scheduled Oil Samples

A list of submitted oil samples and their results are displayed here.

Evaluation levels are related to the severity of the SOS™ review. 1 is Red, requires attention. 2 is Yellow, monitor compartment. 3 is Green, no action required.

The list indicates if the SOS™ sample has been reviewed in the SOS™ Review list on the dashboard.

NOTE: SOS™ samples are displayed on this page whether or not Review SOS™ Samples has been selected on the Machine Information page.

Work Order

This page displayed a history of work orders associated with the equipment. You can view the work order history in Segment View or Invoice View. Click on a work order to view its details.

Communication

The communication page displays a list of communications that are linked to the serial number. Communication items are created in the following events:

- Create Appointment
- Closure Analysis
- Contract Review
- Contract Expiry
- Down Time Report
- Overdue PM Event
- Overdue RS Event
- Product Link Fault Codes
- SOS™ Sample Review

The information that is sent in an email or written in a comment is stored with the communication item.

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ADMIN MENU

Manage Branch Managers

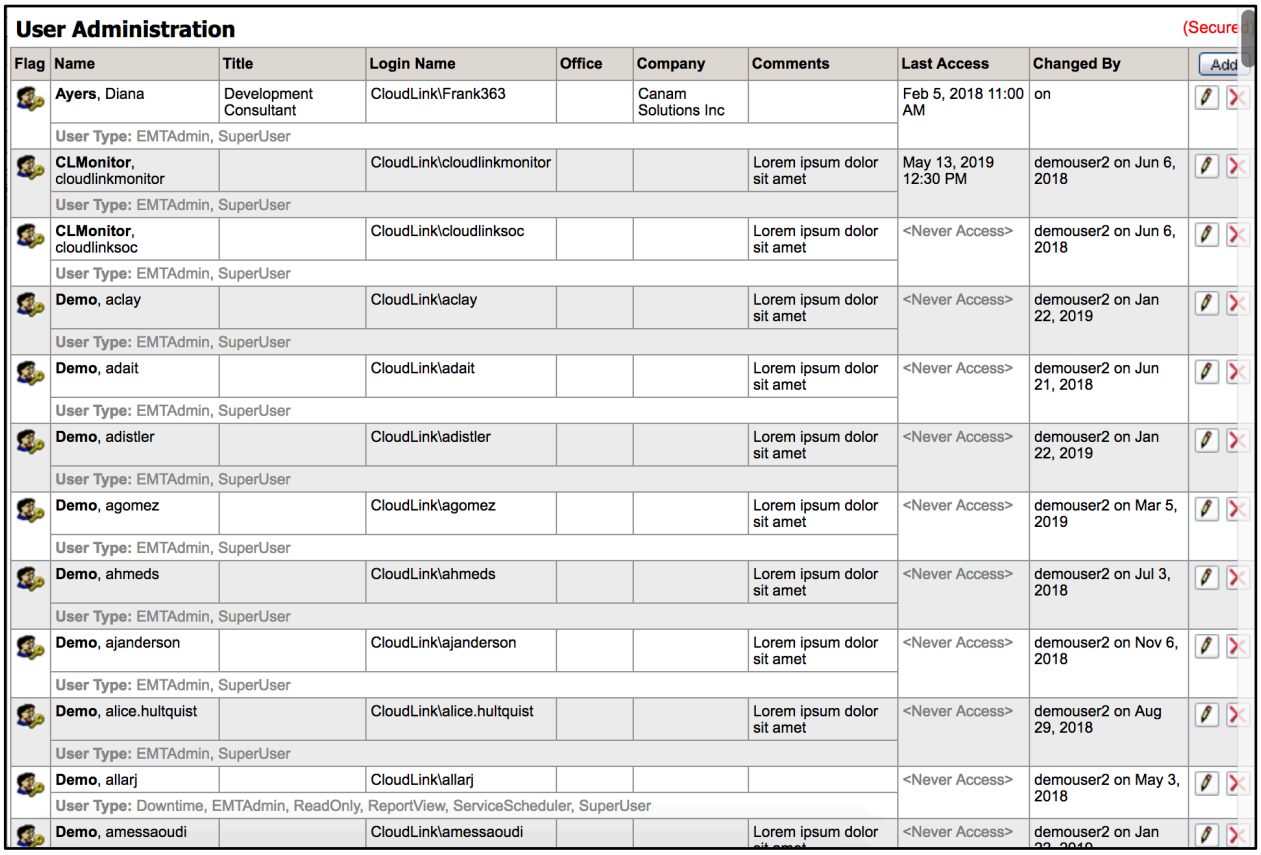
In sections of EMT where there is an email function, the email will default to the branch manager that is assigned unless it is overwritten.

Click **[Assign]** to assign a default branch manager.

Manage Users

Users are granted access based on what they need to do within EMT:

- EMT admin: Access to everything except Manage Deleted Equipment.
- Read Only: Access to view everything only.
- Report View: Access to forecasted financial (box 4) only.
- Service Scheduler: Access to machine service tab and contract tab in Machine Information, which allows Service Scheduler users to view contract related details in EMT.
- Superuser: Access to everything.
- User Admin: Has the ability to add other users.



User Administration (Secure)

Flag	Name	Title	Login Name	Office	Company	Comments	Last Access	Changed By	Add
	Ayers, Diana	Development Consultant	CloudLink\Frank363		Canam Solutions Inc		Feb 5, 2018 11:00 AM	on	
	User Type: EMTAdmin, SuperUser								
	CLMonitor, cloudlinkmonitor		CloudLink\cloudlinkmonitor			Lorem ipsum dolor sit amet	May 13, 2019 12:30 PM	demouser2 on Jun 6, 2018	
	User Type: EMTAdmin, SuperUser								
	CLMonitor, cloudlinksoc		CloudLink\cloudlinksoc			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Jun 6, 2018	
	User Type: EMTAdmin, SuperUser								
	Demo, aclay		CloudLink\aclay			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Jan 22, 2019	
	User Type: EMTAdmin, SuperUser								
	Demo, adait		CloudLink\adait			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Jun 21, 2018	
	User Type: EMTAdmin, SuperUser								
	Demo, adistler		CloudLink\adistler			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Jan 22, 2019	
	User Type: EMTAdmin, SuperUser								
	Demo, agomez		CloudLink\agomez			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Mar 5, 2019	
	User Type: EMTAdmin, SuperUser								
	Demo, ahmeds		CloudLink\ahmeds			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Jul 3, 2018	
	User Type: EMTAdmin, SuperUser								
	Demo, ajanderson		CloudLink\ajanderson			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Nov 6, 2018	
	User Type: EMTAdmin, SuperUser								
	Demo, alice.hultquist		CloudLink\alice.hultquist			Lorem ipsum dolor sit amet	<Never Access>	demouser2 on Aug 29, 2018	
	User Type: EMTAdmin, SuperUser								
	Demo, allarj		CloudLink\allarj				<Never Access>	demouser2 on May 3, 2018	
	User Type: Downtime, EMTAdmin, ReadOnly, ReportView, ServiceScheduler, SuperUser								
	Demo, amessaoudi		CloudLink\amessaoudi			Lorem ipsum dolor	<Never Access>	demouser2 on Jan	

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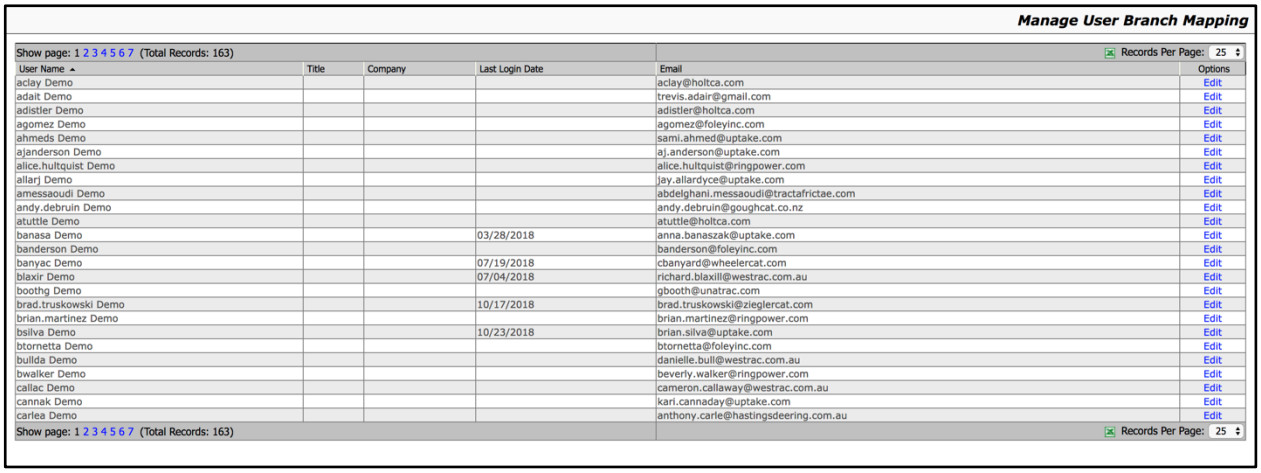
To add a new user to the system:

1. Click the **[Add]** button.
2. Search for the user by their last name, (note that at least three characters are required).
3. Select the user type. Enter any comments if needed.
4. Click **[Add]**.

To edit any user's access or comments, select the Pencil icon located in the user's row.

To remove a user's access, select the red X icon located in the user's row.

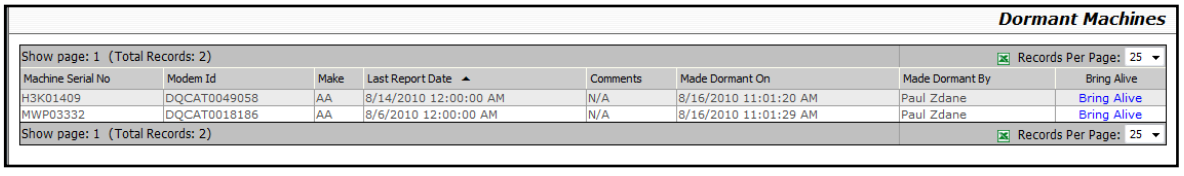
Manage User Division / Branch Access



This page allows you to assign access to particular divisions and branches for each user.

1. Click the **[Edit]** button.
2. Choose the appropriate division(s) and branch(s) for the user.
3. Click **[Save]**. If the security is created by division then the user will have access to all branches that belong to that division.

Manage Dormant Equipment



When the Product Link installed on the equipment is no longer reporting, it places the equipment on this list. Click **[Bring Alive]** to remove the machine from the Dormant Machines list.

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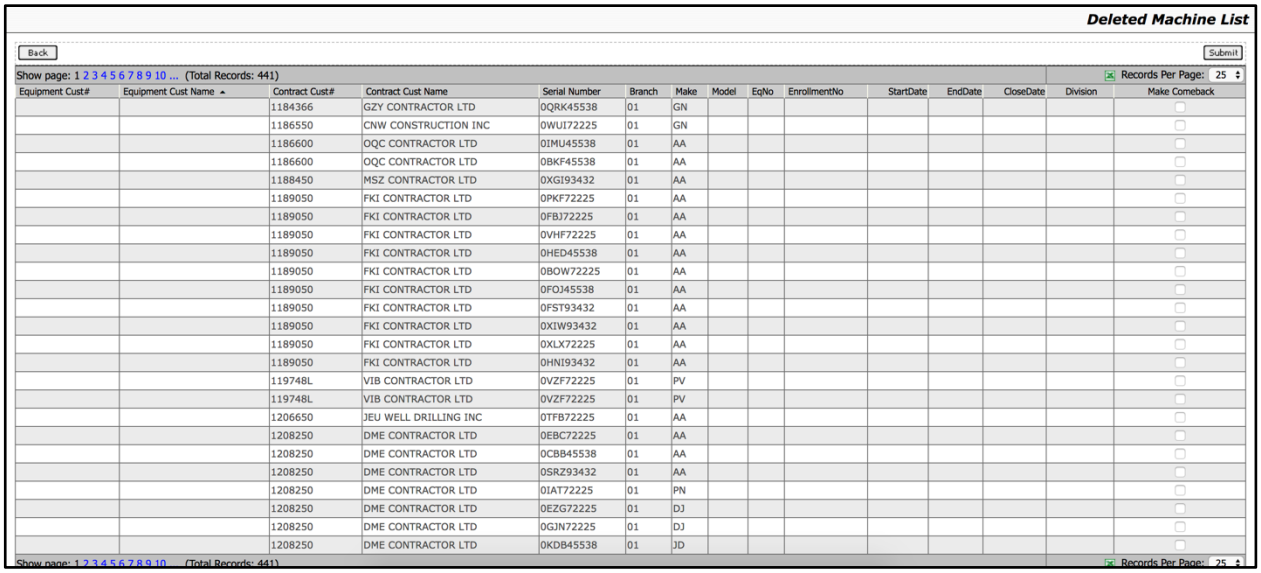
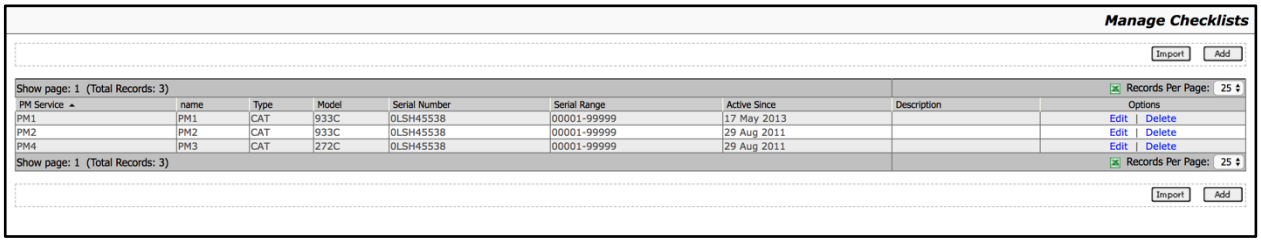
Manage Deleted Equipment



This page displays a list of equipment that was manually deleted by users. To reinstate the equipment(s), click the Make Comeback checkbox and then click **[Submit]**.

Manage Checklists



There are two methods to add checklists to the system:

Import

1. Click **[Import]**.
2. Click **[Choose File]** and select your .mbd file. These types of files are usually provided by CAT.
3. Click **[Load]**.

Add

1. Click **[Add]**.
2. Enter the checklist details into the form fields.
3. Click **[Add]** to search for particular checklist items to add.
4. Click **[Copy]** to add all items from a chosen checklist.
5. Once all items are added, click **[Submit]**.

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To edit an existing checklist:

1. Click **[Edit]**.
2. Edit any information in the form fields.
3. Click **[View Parts]** to add, edit, or delete any parts.
4. Click **[Submit]**.

View Communication History

The communication page displays a list of communications details. Communication items can be filtered by a date range at the top of the page.

Communication items are created in the following events:

- Create Appointment
- Closure Analysis
- Contract Review
- Contract Expiry
- Down Time Report
- Overdue PM Event
- Overdue RS Event
- Product Link Fault Codes
- SOS™ Sample Review

The information that is sent in an email or written in a comment is stored with the communication item. Any files that were attached to the communication are also saved and can be viewed here.

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