Using the Submit Page

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

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

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

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

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

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

Wizard Tab Features and Functions

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

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

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

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

Click on the magnifying glass icon to open a lookup dialog listing the available components. The lookup contains a selectable multi-column table with filter inputs as column headers along with check boxes for selecting multiple components. For example, entering the asset ID will provide the complete list of components for that asset.

LOOKUP VALUE

ASSET ID	COMPONENT	SERIAL NO.	JOBSITE	MANUFACTURER	⚙
W3K					

✔ W3K00902	SWING DRIVE				+
✔ W3K00902	FUEL SYSTEM				+
✔ W3K00902	FINAL DRIVE REAR...				+
✔ W3K00902	FINAL DRIVE REAR...				+
✔ W3K00902	RADIATOR				+
✔ W3K00902	HYDRAULIC SYSTEM				+
✔ W3K00902	ENGINE	THX24698		CATERPILLAR	+

OK **CANCEL**

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

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

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

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

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

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

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

Use the **Trash Can** icon appearing at the right end of each separator to delete the related component from the list. A confirmation dialog appears to ensure that you want to delete the selected component.

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

Saving Drafts

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

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

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

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

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

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

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

CAT DASHBOARD FLEET SAMPLES SUBMIT REPORTS PREFERENCES ADMIN		Welcome PPS-000920D4 ▾

Wizard | Pending

SELECT COMPONENTS

1 — 2 — 3
Select Components | Sample Details | Summary

PRINT LABELS ▾

W3K00902/W3K00902//

* Sampled Date	08/25/2016	**Asset Meter**	2490	**Dealer Branch**	
				Jobsite	MINESITE 2
Location	Durant				

FINAL DRIVE REAR LEFT///

Sample Label No	12345	**Meter On Fluid**	480	**Fluid Brand**	CAT
Fluid Weight	90	**Fluid Change**	Y	**Filter Change**	N
Makeup Fluid Units	qt	**Makeup Fluid**	1	**Shop Job**	14A
Notes		**Priority**	NORMAL	**Fluid Type**	OIL
Kidney Loop	U	**PM Interval**		**Component Meter**	2490

FINAL DRIVE REAR RIGHT///

Sample Label No	12347	**Meter On Fluid**	480	**Fluid Brand**	CAT
Fluid Weight	90	**Fluid Change**	Y	**Filter Change**	N
Makeup Fluid Units		**Makeup Fluid**		**Shop Job**	14C
Notes		**Priority**	NORMAL	**Fluid Type**	OIL
Kidney Loop	U	**PM Interval**		**Component Meter**	2490

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Using the Pending Tab

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

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

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

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

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

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

Table Columns

Choosing Columns to Display

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

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

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

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

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

Sorting and Filtering via Column Headers

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

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

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

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

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

Arranging Columns

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

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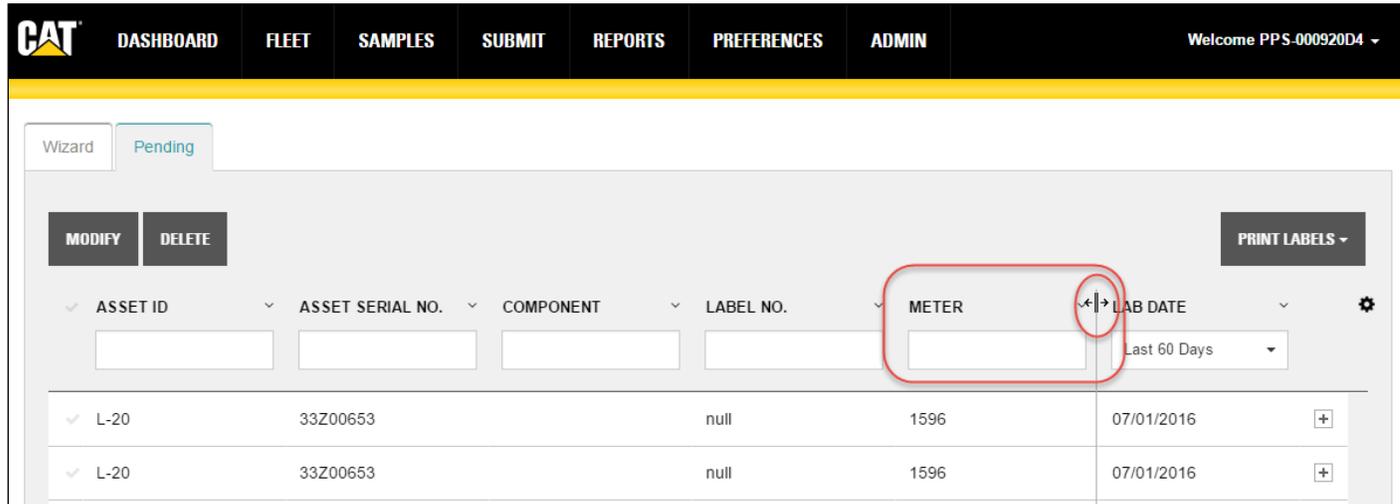

Drag the column to the desired location then release the mouse button. In a moment, the application will reorganize the table with the column in the new location. When you log out, the system saves the latest configuration so that the table will appear the same in your future sessions.

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

Sizing Columns

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

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