

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.

The screenshot displays the CAT application interface. The top navigation bar includes the CAT logo and menu items: DASHBOARD, FLEET, SAMPLES, SUBMIT (highlighted), REPORTS, PREFERENCES, and ADMIN. The user is logged in as PPS-000920D4. The main content area shows the 'Wizard' tab selected, with a progress indicator for three steps: 1. Select Components (highlighted), 2. Sample Details, and 3. Summary. A 'SAMPLE DETAILS' button is visible. Below the progress indicator, there is a 'Component Set' dropdown menu and a 'Search or Add Component' search field. A light blue instructional box contains the following text:

No components selected for sampling!

Please use one of the following options for selecting components:

1. Use Component Set dropdown
2. Type directly in Search field using the autosuggest
3. Click on the Magnifying glass icon for Lookup
4. Select components from the Fleet page - Asset Details View
5. Select components from The Fleet page - Components Tab

The instructional graphic also shows a zoomed-in view of the search field with red circles and numbers 1, 2, and 3 pointing to the dropdown menu, the search input, and the magnifying glass icon, respectively. The footer of the page reads 'Caterpillar © 2016. All Rights Reserved.'

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.

Wizard Pending

1 2 3
Select Components Sample Details Summary

SAMPLE DETAILS →

Component Set -- Choose Set --

Search or Add Component

REMOVE SAVE COMPONENT SET

ASSET ID	COMPONENT	MANUFACTURER	MODEL	SERIAL NO.
W3K00902	HYDRAULIC SYSTEM			
W3K00902	SWING DRIVE			
W3K00902	RADIATOR			
W3K00902	FUEL SYSTEM			
W3K00902	FINAL DRIVE REAR LEFT			
W3K00902	FINAL DRIVE REAR RIGHT			
W3K00902	ENGINE	CATERPILLAR	ENGINE	THX24698

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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	
<input type="text" value="W3K"/>	<input type="text"/>				

<input checked="" type="checkbox"/>	W3K00902	SWING DRIVE			<input type="text"/>	+
<input type="checkbox"/>	W3K00902	FUEL SYSTEM			<input type="text"/>	+
<input checked="" type="checkbox"/>	W3K00902	FINAL DRIVE REAR...			<input type="text"/>	+
<input checked="" type="checkbox"/>	W3K00902	FINAL DRIVE REAR...			<input type="text"/>	+
<input type="checkbox"/>	W3K00902	RADIATOR			<input type="text"/>	+
<input type="checkbox"/>	W3K00902	HYDRAULIC SYSTEM			<input type="text"/>	+
<input type="checkbox"/>	W3K00902	ENGINE	THX24698	CATERPILLAR	<input type="text"/>	+

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.

Wizard Pending

1 2 3
Select Components Sample Details Summary

SAMPLE DETAILS →

Component Set
W3K00902 Drives

Search or Add Component
2 items selected

REMOVE

SAVE COMPONENT SET

✓ ASSET ID	COMPONENT	MANUFACTURER	MODEL	SERIAL NO.
✓ W3K00902	SWING DRIVE			
✓ W3K00902	FINAL DRIVE REAR RIGHT			
✓ W3K00902	FINAL DRIVE REAR LEFT			
✓ W3K00902	FUEL SYSTEM			
✓ W3K00902	RADIATOR			

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.

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.

The screenshot displays the CAT Pending Samples interface. At the top, there is a navigation bar with the CAT logo and menu items: DASHBOARD, FLEET, SAMPLES, SUBMIT, REPORTS, PREFERENCES, and ADMIN. The user is logged in as 'Welcome PPS-000920D4'. Below the navigation bar, there are tabs for 'Wizard' and 'Pending'. The 'Pending' tab is active. On the left, there are 'MODIFY' and 'DELETE' buttons. On the right, there is a 'PRINT LABELS' button. The main area contains a search filter table with columns: ASSET ID, ASSET SERIAL NO., COMPONENT, LABEL NO., METER, and LAB DATE. The 'ASSET ID' field contains 'W3K' and the 'LAB DATE' dropdown is set to 'Last 60 Days'. Below the search filters is a table of sample entries. Each entry has a checkmark, an asset ID, an asset serial number, a component name, a label number, a meter value, a lab date, and a plus sign icon. The table shows 19 items, with the first 10 displayed. At the bottom, there is a pagination control showing 'Showing 1 - 10 of 19 items' and a 'Show: 10' dropdown. The footer contains the text 'Caterpillar © 2016. All Rights Reserved.'

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

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.

Wizard Pending

MODIFY DELETE PRINT LABELS ▾

ASSET ID	ASSET SERIAL NO.	COMPONENT	LABEL NO.	METER	LAB DATE	
W3K					Last 60 Days	
✓ W3K00902	W3K00902	SWING DRIVE		0	08/25/2016	+
✓ W3K00902	W3K00902	FINAL DRIVE REAR RI...		0	08/25/2016	+
✓ W3K00902	W3K00902	FINAL DRIVE REAR L...		0	08/25/2016	+
✓ W3K00902	W3K00902	FINAL DRIVE REAR L...	12345	2490	08/25/2016	+
✓ W3K00902	W3K00902	SWING DRIVE	12346	2490	08/25/2016	+
✓ W3K00902	W3K00902	FINAL DRIVE REAR RI...	12347	2490	08/25/2016	+

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 screenshot shows the CAT software interface. At the top, there is a navigation bar with the following tabs: DASHBOARD, FLEET, SAMPLES, SUBMIT, REPORTS, PREFERENCES, and ADMIN. The user is logged in as 'Welcome PPS-000920D4'. Below the navigation bar, there are two tabs: 'Wizard' and 'Pending'. The main content area features a table with columns: ASSET ID, ASSET SERIAL NO., COMPONENT, LABEL NO., METER, and LAB DATE. The table contains six rows of data, all with 'L-20' as the Asset ID and '33Z00653' as the Asset Serial No. A settings menu is open on the right side of the table, showing a list of columns that can be selected or deselected. The columns listed are: Asset ID, Asset Serial No., Component, Label No., Meter, Lab Date, Make, Model, Jobsite, Submitted By, Submitted On, and Sample No. The 'Clear all filters' option is also visible in the menu. The bottom of the interface shows 'Showing 1 - 6 of 6 items' and a 'Show: 10' dropdown menu.

ASSET ID	ASSET SERIAL NO.	COMPONENT	LABEL NO.	METER	LAB DATE
L-20	33Z00653		null	1596	07/01/2015
L-20	33Z00653		null	1596	07/01/2015
L-20	33Z00653		null	1596	07/01/2015
L-20	33Z00653		null	1596	07/01/2015
L-20	33Z00653		null	1596	07/01/2015
L-20	33Z00653		null	1596	07/01/2015

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.

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

Wizard Pending

MODIFY DELETE PRINT LABELS

ASSET ID ASSET SERIAL NO. COMPONENT LABEL NO. METER LAB DATE Last 60 Days

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

Showing 1 - 6 of 6 items Show: 10

« < 1 / 1 > »

Sorting and Filtering via Column Headers

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

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

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

Wizard Pending

MODIFY DELETE PRINT LABELS

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

Showing 1 - 9 of 9 items Show: 10

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

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

Arranging Columns

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

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

Wizard Pending

MODIFY DELETE PRINT LABELS

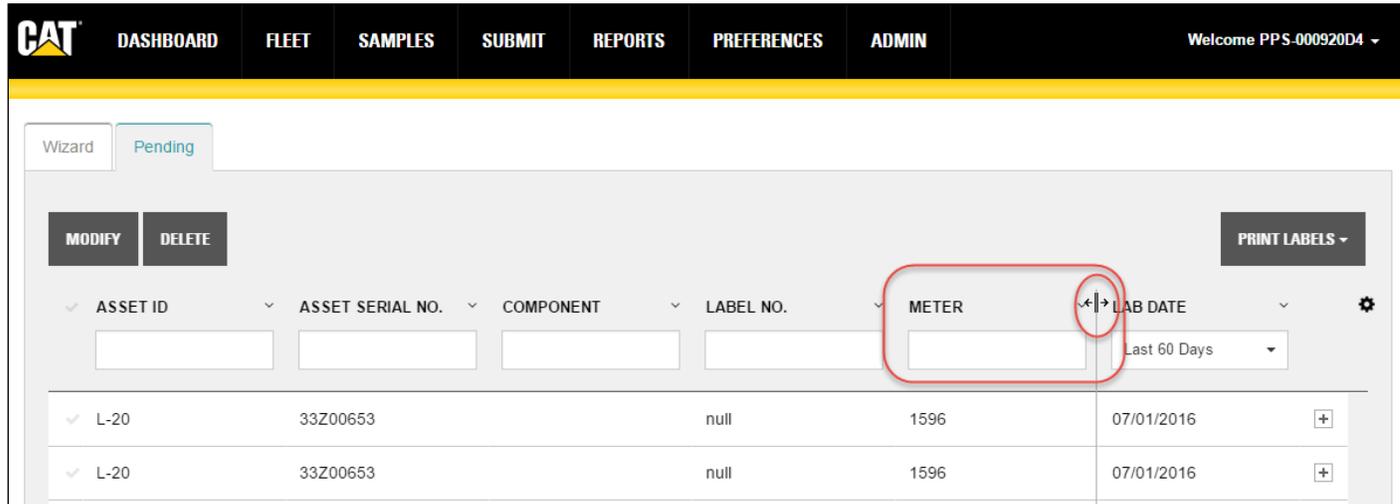
ASSET ID	ASSET SERIAL NO.	COMPONENT	LABEL NO.	METER	LAB DATE
L-20	33Z00653		null	1596	07/01/2016

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

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

Sizing Columns

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



The screenshot shows the CAT software interface with a navigation bar at the top containing 'CAT', 'DASHBOARD', 'FLEET', 'SAMPLES', 'SUBMIT', 'REPORTS', 'PREFERENCES', and 'ADMIN'. A 'Welcome PPS-000920D4' message is visible on the right. Below the navigation bar, there are tabs for 'Wizard' and 'Pending'. The main content area features a table with columns: ASSET ID, ASSET SERIAL NO., COMPONENT, LABEL NO., METER, and LAB DATE. A red circle highlights the double-line arrow between the METER and LAB DATE columns, indicating the column sizing handle. The table contains two rows of data:

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

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.