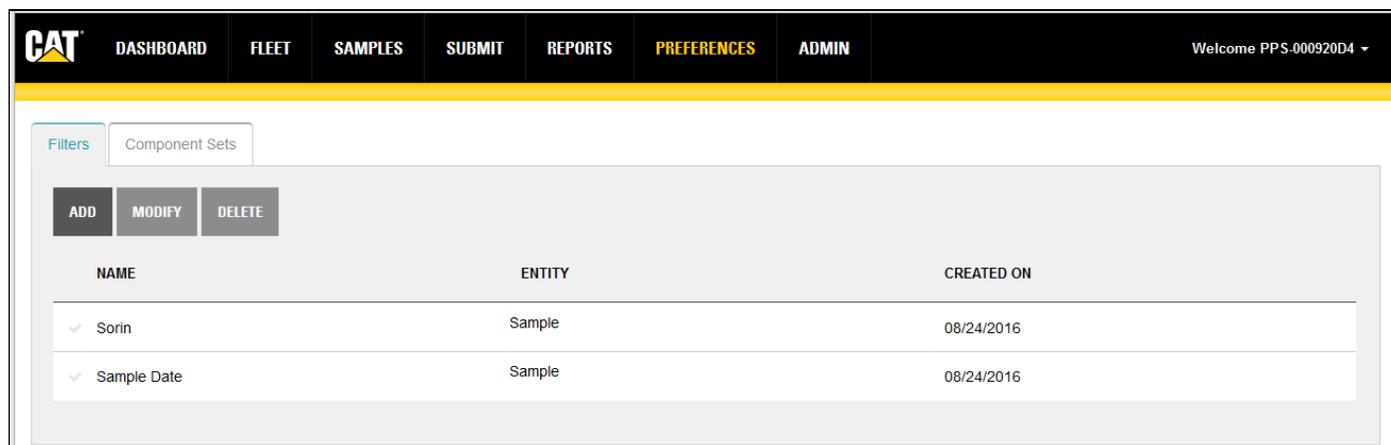


Using the Preferences Page

Use the *Preferences* page to create and manage filters and component sets used within the application. The page includes two tabs—**Filters** and **Component Sets** to facilitate task completion in each area.



Filters Tab Features and Functions

Use the **Filters** tab to create new filters, delete existing filters, and modify conditions and parameters for existing filters.

As the graphic above shows, the tab includes a filters list within a table that also displays the entity and creation date of each filter.

The filters list includes all filters currently used within various pages and processes within the user interface. The specific filters are viewable from pages within the interface related to the entity selected:

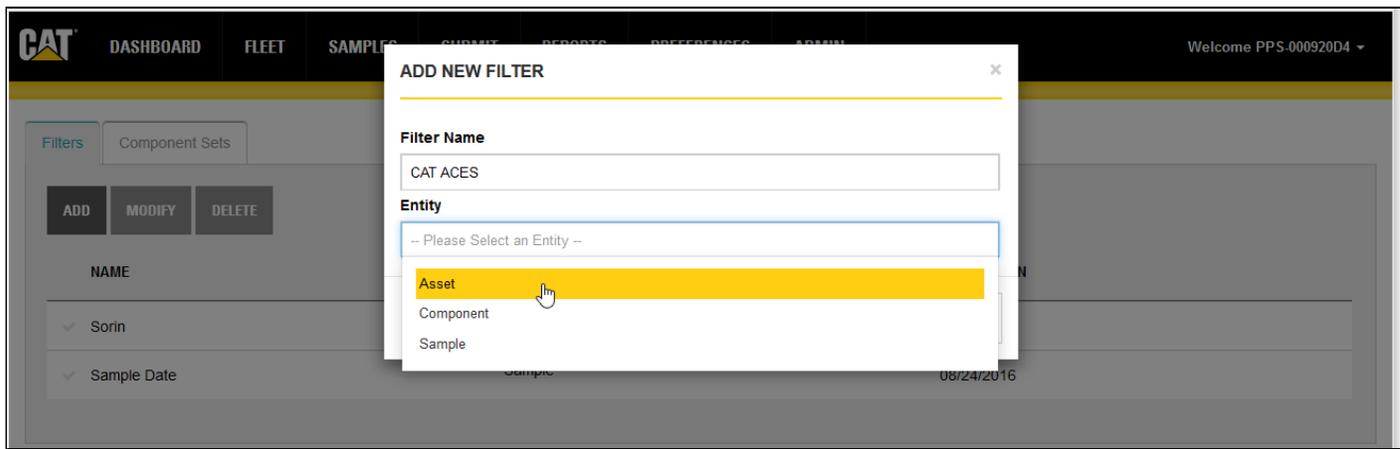
- **Asset**—these filters appear in the *Fleet* page **Assets** tab.
- **Component**—these filters appear in the *Fleet* page **Components** tab.
- **Sample**—these filters appear in the *Samples* page.

Adding a New Filter

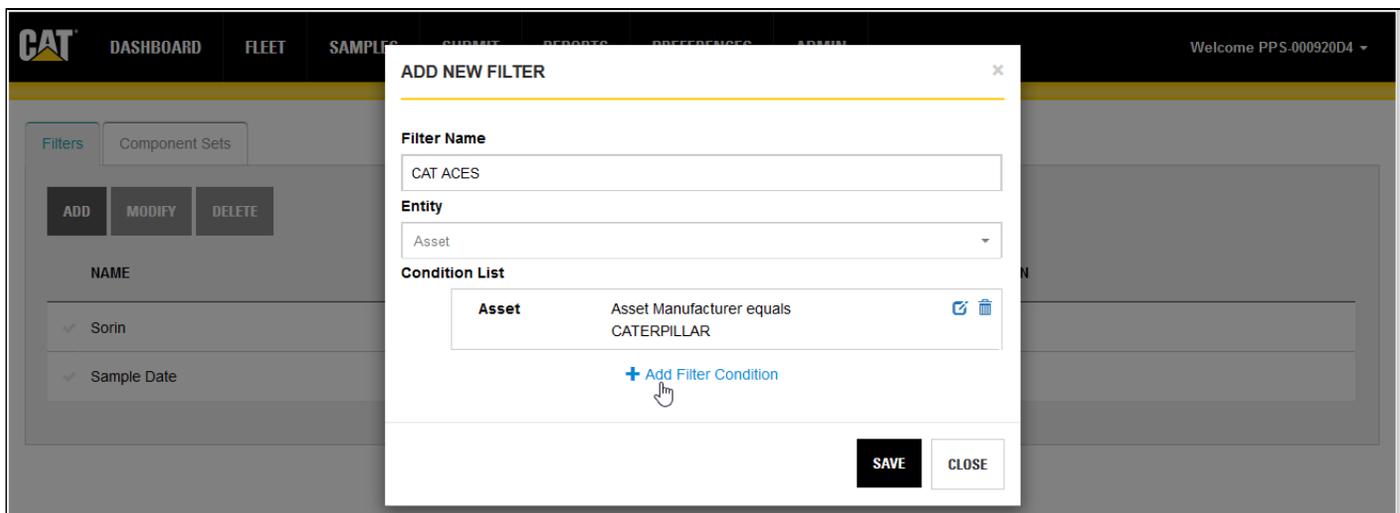
Click on the **ADD** button to open a dialog box used to create a new filter.

In the **Filter Name** field, enter a descriptive name that will help you identify the filter's intended function. In the example, we use CAT ACES to identify the target manufacturer and dealer.

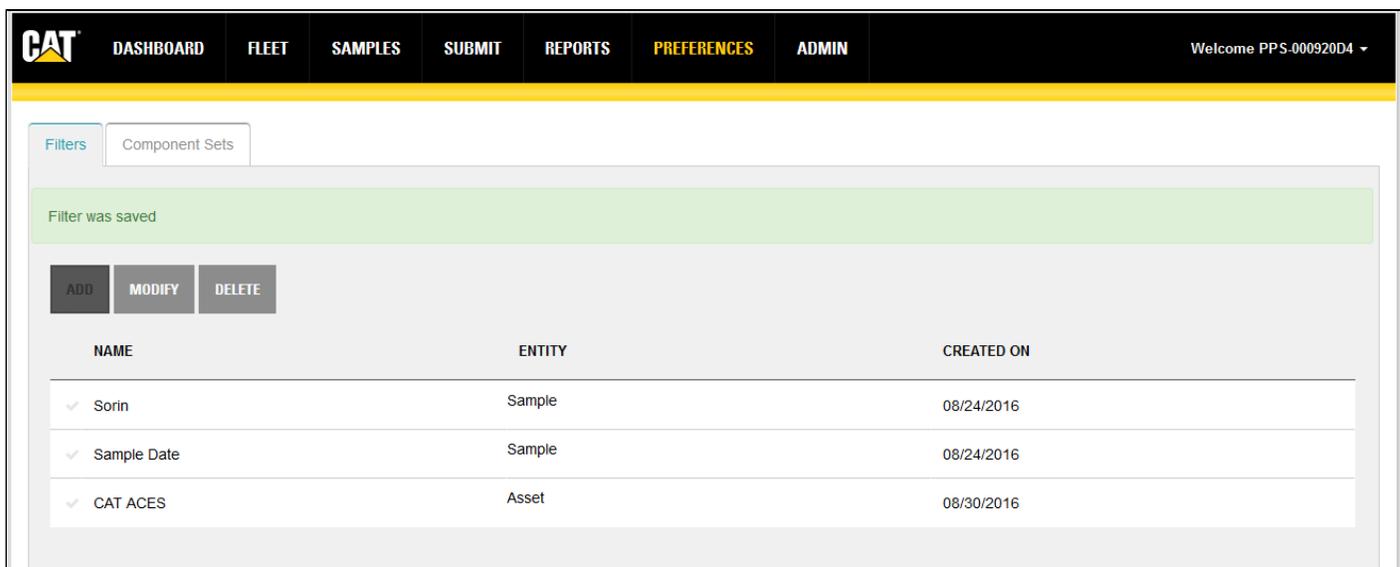
Use the **Entity** drop-down list to select whether the filter will target assets, components, or samples.



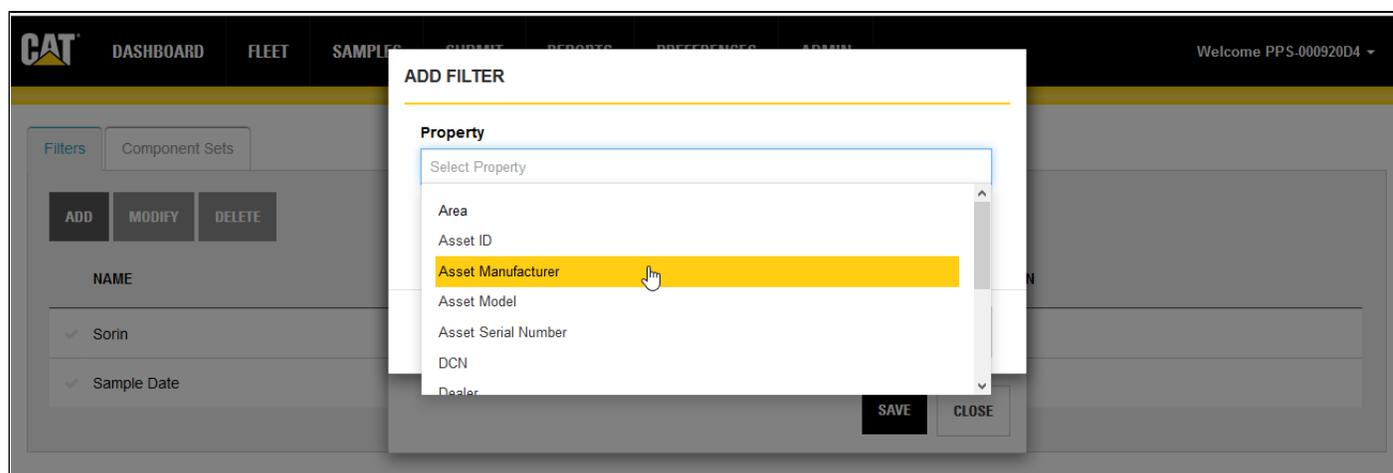
Click on **Add Filter Condition** to add at least one condition. Choose the filter **Property**, **Operator**, and **Value** using the appropriate fields.



Click on **Add Filter Condition** to add other conditions if needed. Otherwise, click on the **SAVE** button to complete the process and to add the new filter to your list.

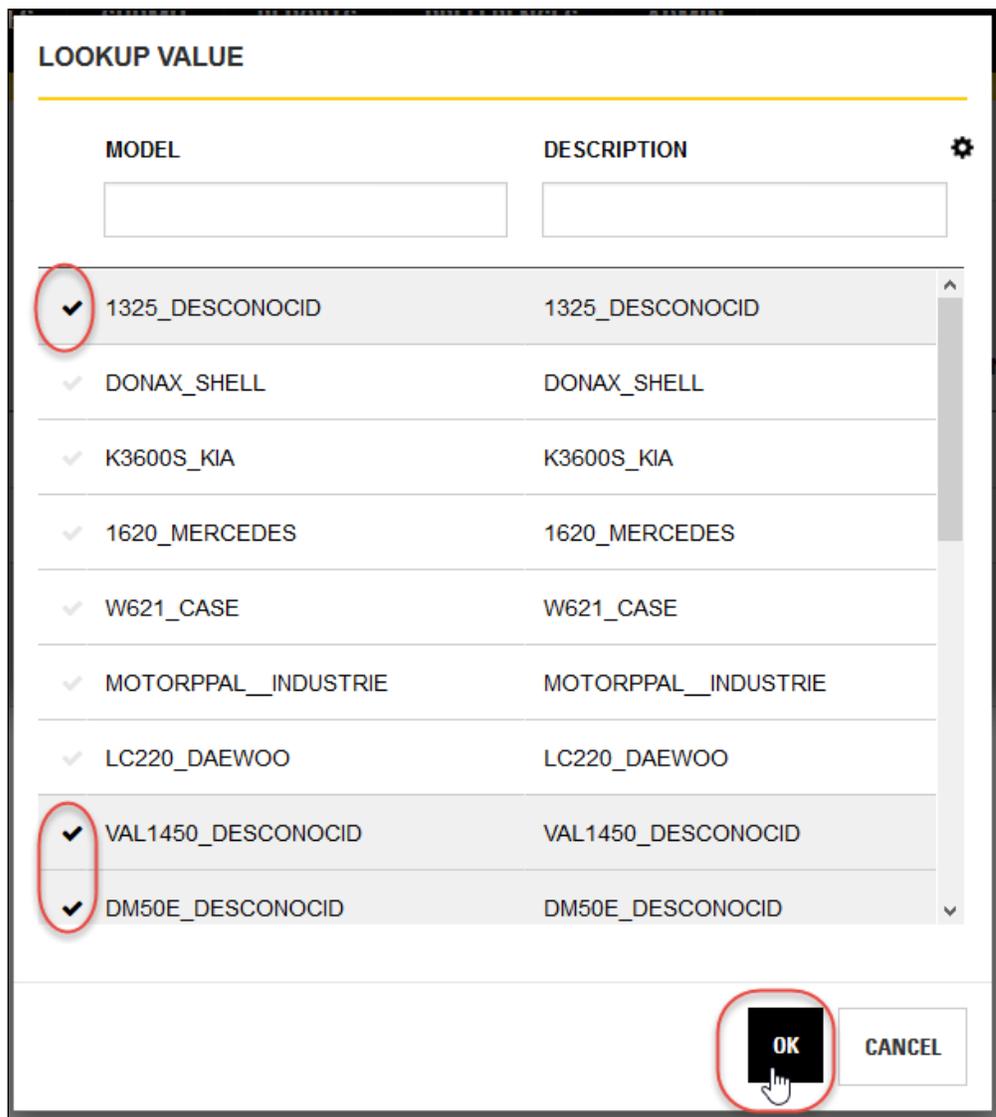


Note that the **Value** fields feature suggest capability that automatically provides a list of potential matches as you type part of a value in the field.



Alternatively, you can click on the magnifying glass icon to open a *LOOKUP VALUE* dialog that you can use to locate and select your values.

As the example shows, depending on the **Operator** selected, you can select multiple values for some conditions by holding down the CTRL key on your keyboard and clicking on each needed value's **Check Mark**.



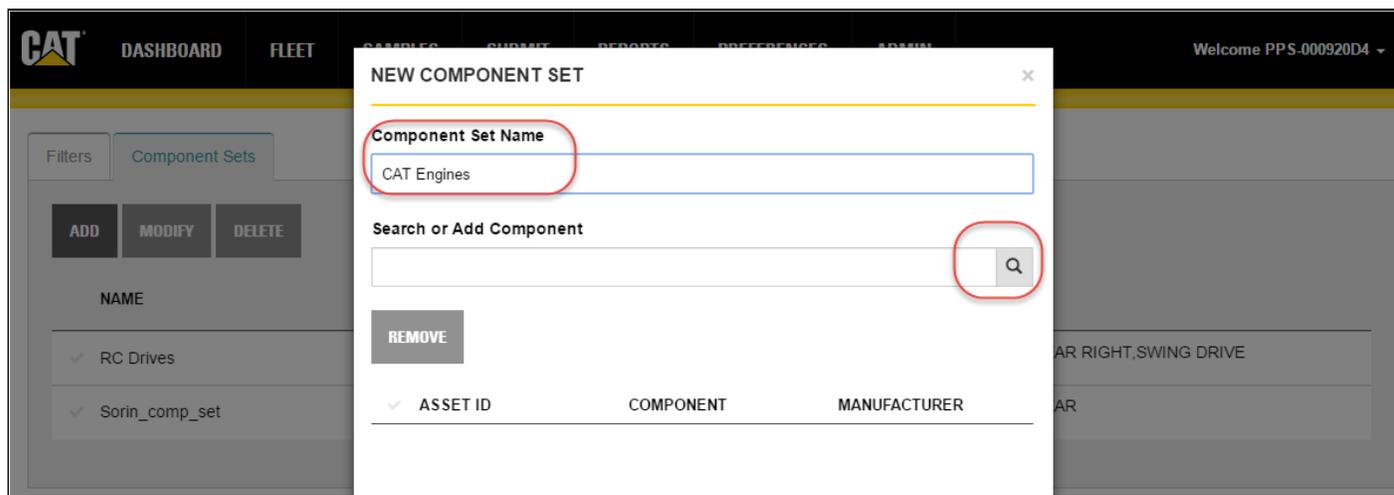
Component Sets Tab Features and Functions

Components sets are very useful in situations such as the routine submission of samples for a set of components found in assets within your fleet.

Use the **Component Sets** tab to create new component sets that will be used to expedite sample submission, or to manage existing component sets.

Click on the **Add** button to open the *NEW COMPONENT SET* dialog.

Enter a descriptive name in the **Component Set Name** field then click on the magnifying glass icon to add components to the list.

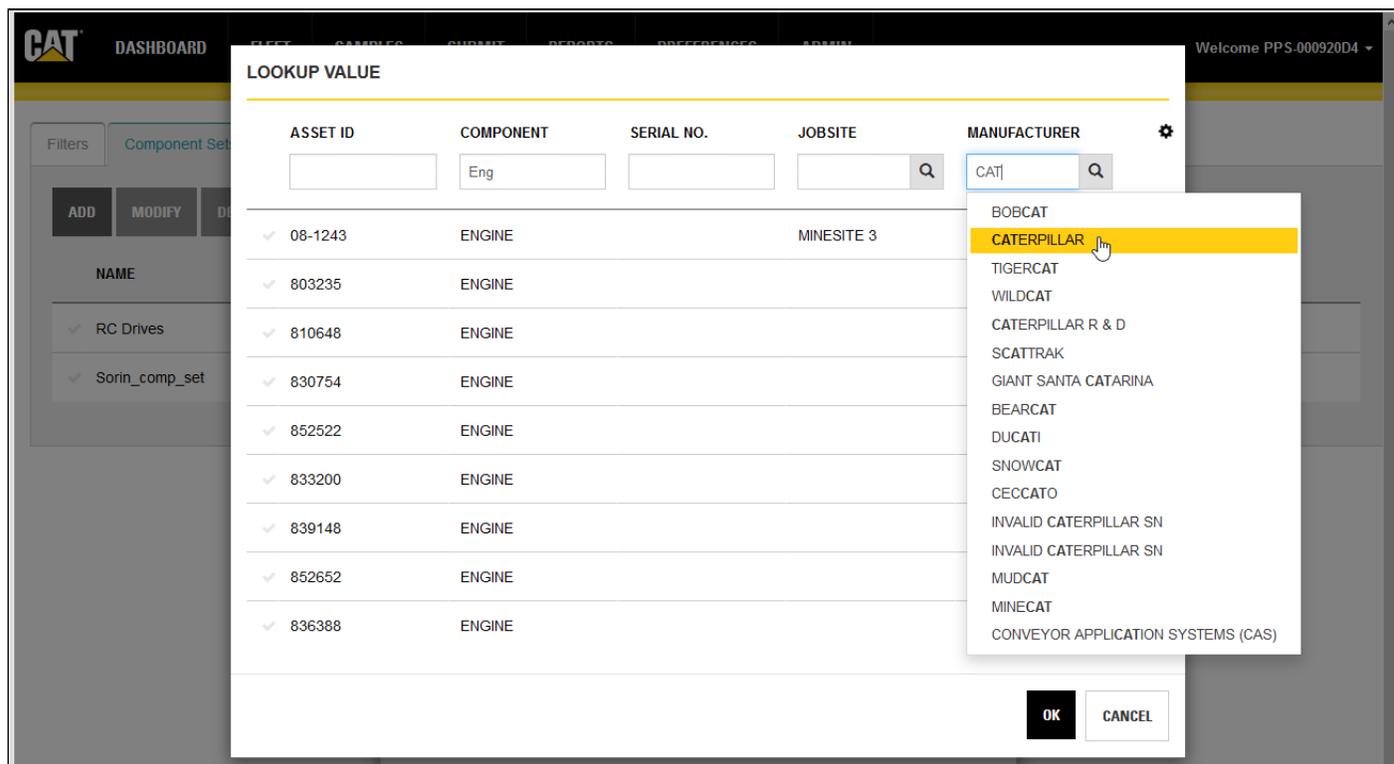


The *LOOKUP VALUE* dialog box opens to help you locate and select components to add to the set.

You can type partial values in the filter fields below a column header then press Enter on the keyboard to have the table display only components matching the parameters entered.

Some fields have suggest capability—such as the **MANUFACTURER** field—in which a list is automatically displayed as you enter partial values.

Other fields have a magnifying glass icon attached that will open a *LOOKUP VALUE* dialog when clicked.



Fields within the *LOOKUP VALUE* dialog have similar filtering and suggest capability.

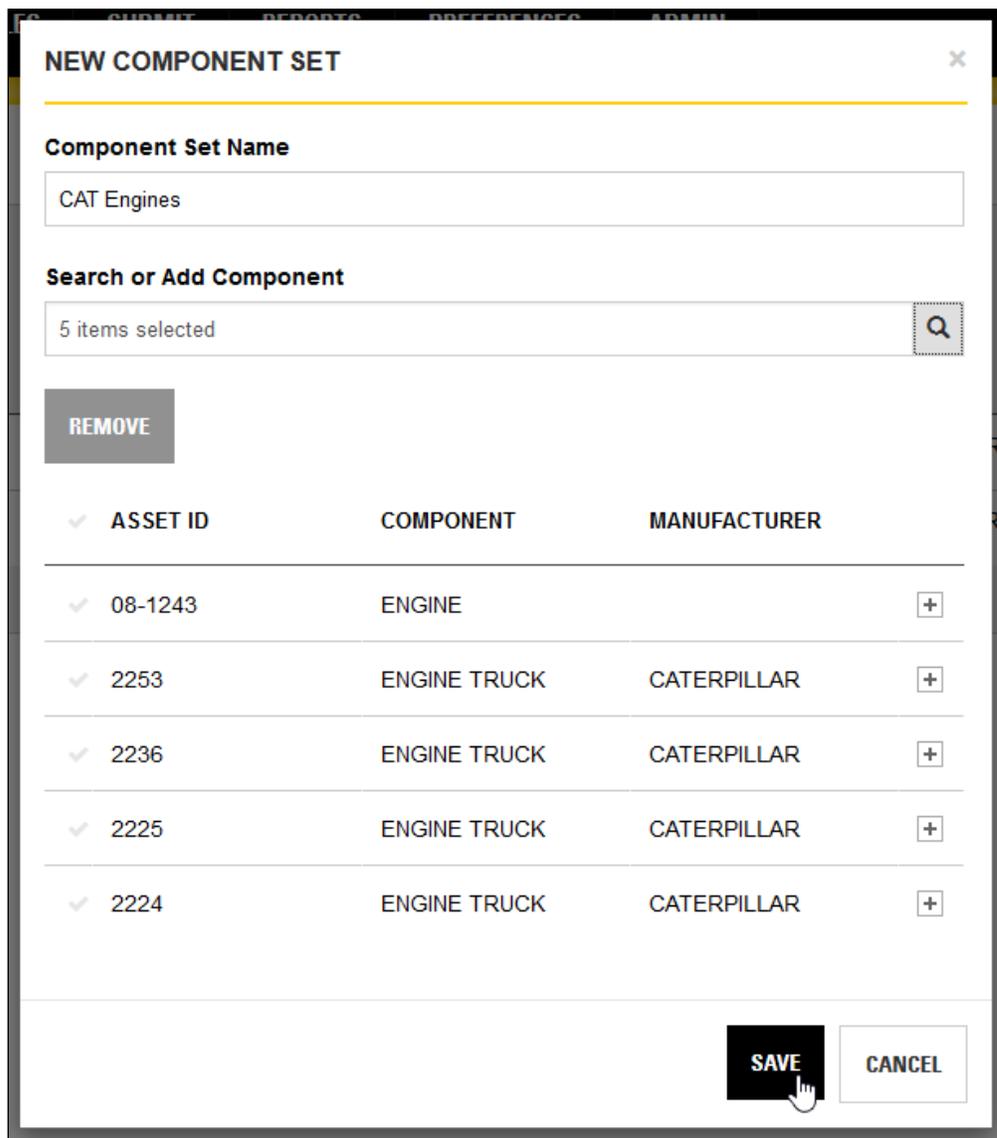
Click on the **Check Marks** for each component that you want to add to your set then click on the **OK** button.

LOOKUP VALUE

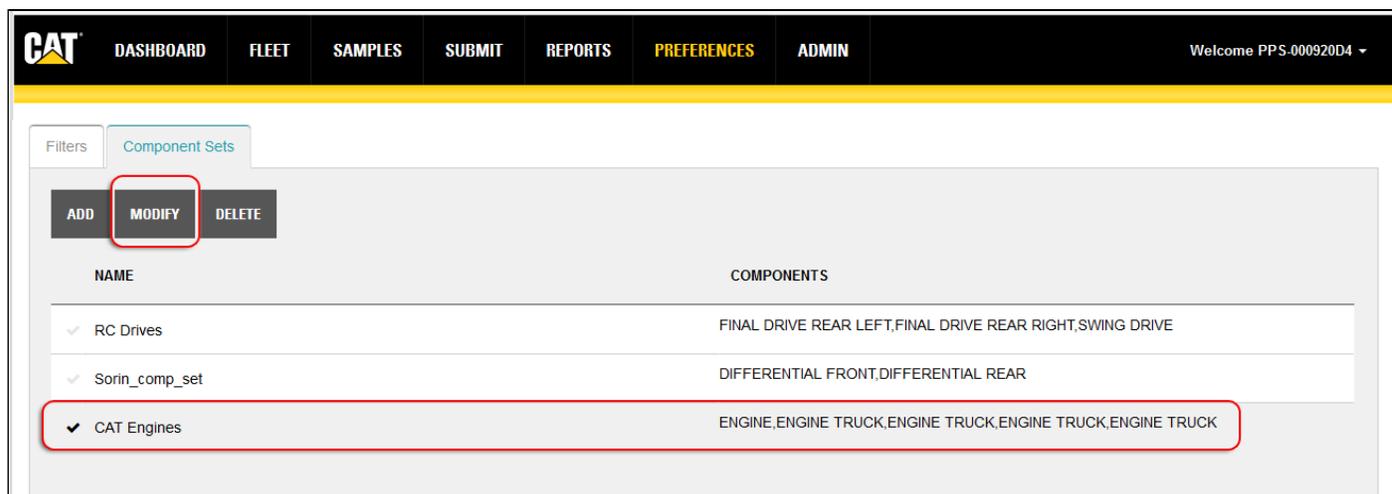
ASSET ID	COMPONENT	SERIAL NO.	JOBSITE	MANUFACTURER
✓ 2253	ENGINE TRUCK			CATERPILLAR
✓ 2236	ENGINE TRUCK			CATERPILLAR
✓ 2225	ENGINE TRUCK			CATERPILLAR
✓ 2224	ENGINE TRUCK			CATERPILLAR
✓ 23204	ENGINE	5ED02531	MINESITE 2	CATERPILLAR
✓ 982M	ENGINE			CATERPILLAR
✓ MWP00468	ENGINE			CATERPILLAR
✓ W3K00902	ENGINE	THX24698		CATERPILLAR

Buttons: OK, CANCEL

You will return to the *NEW COMPONENT SET* dialog where you can remove components if needed or repeat the process for adding components.



When you are satisfied with your selections, click on **SAVE**. The new set will be added to the components list. From here, you can modify a selected list by clicking on the list's **Check Mark** then the **MODIFY** button.



From the *EDIT COMPONENT SET* dialog box you can change the component set name, and add or remove components

as needed.

EDIT COMPONENT SET [X]

Component Set Name
CAT Truck Engines

Search or Add Component [Q]

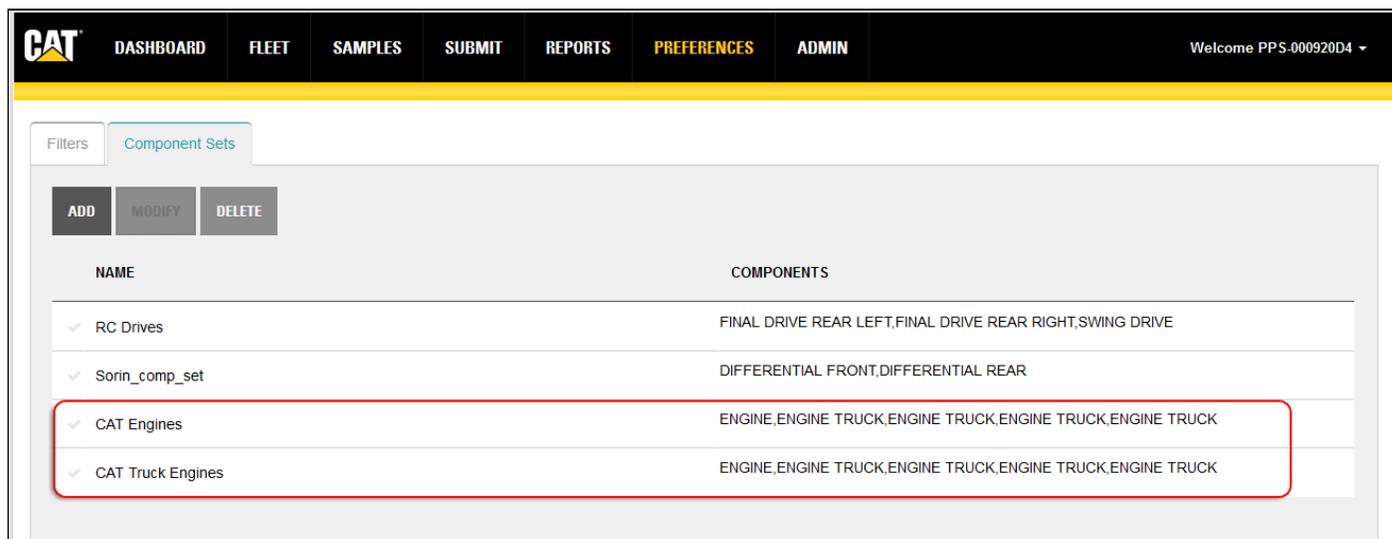
REMOVE

ASSET ID	COMPONENT	MANUFACTURER
✓ 08-1243	ENGINE	
✓ 2253	ENGINE TRUCK	CATERPILLAR
✓ 2236	ENGINE TRUCK	CATERPILLAR
✓ 2225	ENGINE TRUCK	CATERPILLAR
✓ 2224	ENGINE TRUCK	CATERPILLAR

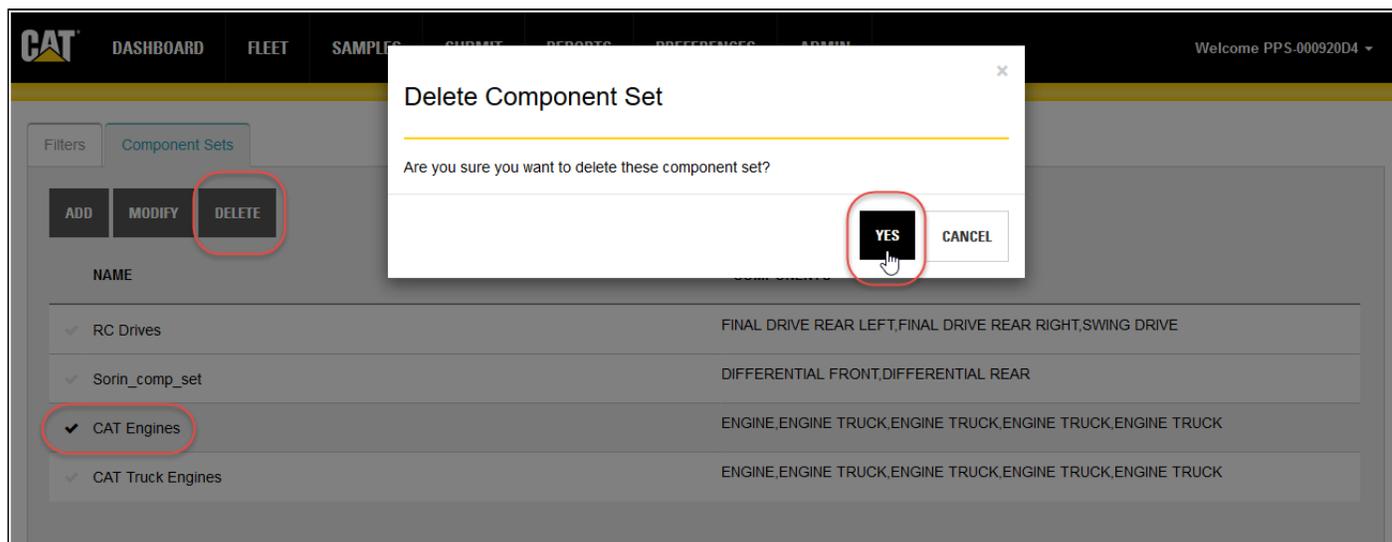
SAVE **CANCEL**

If you change the name of the component list, the identical list will be saved with the new name, but the original list will still appear in the component set list.

In addition to simply modifying the name, this can be an easy way to create a new component list that begins with some or all of the components in an existing list.



Deleting a component list from the table is simply a matter of clicking on the list's **Check Mark** then clicking on the **DELETE** button.



A confirmation dialog box will appear to ensure that you want to delete the selected list.