

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 shows the CAT application interface. The top navigation bar includes 'CAT', 'DASHBOARD', 'FLEET', 'SAMPLES', 'SUBMIT', 'REPORTS', and 'PREFERENCES'. The user is logged in as 'Welcome PPS-000920D4' and has a 'Need Help' link. The 'Submit' page is active, showing the 'Wizard' tab selected. The wizard consists of three steps: 1. Select Components, 2. Sample Details, and 3. Summary. A 'SAMPLE DETAILS' button is visible. Below the wizard steps, there is a 'Component Set' dropdown menu and a 'Search or Add Component' search field. A light blue instructional box is displayed, containing 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'. Red circles with numbers 1, 2, and 3 are overlaid on the 'Component Set' dropdown, the search field, and the search icon respectively.

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.

ASSET ID	COMPONENT	ASSET SERIAL NUMBER	COMPONENT MANUFACTURER	JOBSITE	MODEL
2225	ENGINE TRUCK	6C317826	INTERNATIONAL		C13
2253	ENGINE TRUCK	2HSCE5BR37C414194	INTERNATIONAL		C15
2236	ENGINE TRUCK	2HSCE5BR57C414195	INTERNATIONAL		C13
2224	ENGINE TRUCK	2HSCE5BR06C317825	INTERNATIONAL		C13
982M	ENGINE	K1Y00302	CATERPILLAR		C13

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.

The headers in this dialog also employ suggest and lookup features. For example, entering a partial value in the **ASSET ID** then pressing enter will provide the list of asset IDs including the partial value along with the components for those assets. You can then complete the asset ID or simply select the components needed from an asset for sample submission.

COMPONENT LOOKUP

ASSET ID	COMPONENT	ASSET SERIAL NUMB...	COMPONENT MANUF...	JOBSITE
<input type="text" value="W3K"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Q"/>	<input type="text" value="Q"/>
<input checked="" type="checkbox"/> W3K00902	SWING DRIVE	W3K00902	CATERPILLAR	
<input checked="" type="checkbox"/> W3K00902	HYDRAULIC SYSTEM	W3K00902	CATERPILLAR	
<input checked="" type="checkbox"/> W3K00902	FUEL SYSTEM	W3K00902	CATERPILLAR	
<input checked="" type="checkbox"/> W3K00902	FINAL DRIVE REAR ...	W3K00902	CATERPILLAR	
<input checked="" type="checkbox"/> W3K00902	RADIATOR	W3K00902	CATERPILLAR	
<input checked="" type="checkbox"/> W3K00902	FINAL DRIVE REAR ...	W3K00902	CATERPILLAR	
<input checked="" type="checkbox"/> W3K00902	ENGINE	W3K00902	CATERPILLAR	

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 Select Components 2 Sample Details 3 Summary

SAMPLE DETAILS →

Component Set: CAT Engines

Search or Add Component: 7 items selected

REMOVE SAVE COMPONENT SET

ASSET ID	COMPONENT	ASSET SERIAL NUMBER	COMPONENT MANUFACTURER	JOBSITE	MODEL
✓ W3K00902	SWING DRIVE	W3K00902	CATERPILLAR		
✓ W3K00902	HYDRAULIC SYSTEM	W3K00902	CATERPILLAR		
✓ W3K00902	FUEL SYSTEM	W3K00902	CATERPILLAR		
✓ W3K00902	FINAL DRIVE REAR L...	W3K00902	CATERPILLAR		
✓ W3K00902	RADIATOR	W3K00902	CATERPILLAR		
✓ W3K00902	FINAL DRIVE REAR RI...	W3K00902	CATERPILLAR		
✓ W3K00902	ENGINE	W3K00902	CATERPILLAR		C9

After clicking on the **Check Marks** to select one or more components 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.

Wizard Pending

← ADD SAMPLES

1 Select Components

2 Sample Details

3 Summary

SUBMIT SAMPLES → CANCEL

W3K00902/W3K00902//

* Sampled Date 10/28/2016

Asset Meter 3000

Dealer Branch

Jobsite MINESITE 2

Location

PM Interval

Shop Job 123

Required Fields *

SWING DRIVE/// Delete

Previous Meter 2490

Sample Label No 12345

Meter On Fluid 300

Fluid Brand CAT

Fluid Weight 50

Fluid Change Yes

Filter Change Yes

Makeup Fluid Units qt

Makeup Fluid 1

Notes

Priority NORMAL

Fluid Type OIL

Kidney Loop Unknown

Component Meter 900

SAVE TO DRAFT SUBMIT SAMPLES →

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 **Delete** (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	10/28/2016	Asset Meter 3000
		Dealer Branch
		Jobsite MINESITE 2
Location	PM Interval	Shop Job 123
SWING DRIVE///		
Previous Meter	2490	Sample Label No 12345
Fluid Brand	CAT	Meter On Fluid 300
Fluid Weight	50	Fluid Change Y
Filter Change	Y	Makeup Fluid Units qt
Notes		Makeup Fluid 1
Kidney Loop	U	Priority NORMAL
		Fluid Type OIL
		Component Meter 900

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.

CAT DASHBOARD FLEET SAMPLES **SUBMIT** REPORTS PREFERENCES Welcome PPS-000920D4 Need Help ?

Wizard Pending

MODIFY DELETE PRINT LABELS

ASSET ID ASSET SERIAL NO. COMPONENT LABEL NO. METER LAB DATE

W3K Last 60 Days

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	+

Showing 1 - 10 of 19 items Show: 10

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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.

CAT DASHBOARD FLEET SAMPLES **SUBMIT** REPORTS PREFERENCES Welcome PPS-000920D4 Need Help ?

Wizard Pending

MODIFY DELETE PRINT LABELS

ASSET ID ASSET SERIAL NO. COMPONENT LABEL NO. METER LAB DATE

W3K Last 60 Days

ASSET ID	ASSET SERIAL NO.	COMPONENT	LABEL NO.	METER	LAB DATE	
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 tabs: DASHBOARD, FLEET, SAMPLES, SUBMIT, REPORTS, and PREFERENCES. The 'SUBMIT' tab is active. On the right of the navigation bar, it says 'Welcome PPS-00920D4' and 'Need Help'. Below the navigation bar, there are tabs for 'Wizard' and 'Pending'. The main area contains a table with columns: ASSET ID, ASSET SERIAL NO., COMPONENT, LABEL NO., METER, and LAB DATE. Each column header has a checkmark and a dropdown arrow. A settings gear icon is located to the right of the 'LAB DATE' header. A dropdown menu is open, showing 'Clear all filters' and a list of columns with checkmarks: Asset ID, Asset Serial No., Component, Label No., Meter, Lab Date, Make, Model, Jobsite, Submitted By, Submitted On, and Sample No. At the bottom left, it says 'Showing 1 - 6 of 6 items' and 'Show: 10'. At the bottom right, there are pagination controls.

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.

The screenshot shows the CAT system interface. At the top, there is a navigation bar with tabs for DASHBOARD, FLEET, SAMPLES, SUBMIT, REPORTS, and PREFERENCES. The user is logged in as PPS-000920D4. Below the navigation bar, there are tabs for Wizard and Pending. The main content area features a table of assets with columns for ASSET ID, ASSET SERIAL NO., COMPONENT, LABEL NO., METER, and LAB DATE. A detailed view of one asset is highlighted in red, showing fields for Make, Model, Jobsite, Submitted By (DOUG CHANDLER), and Submitted On (06/30/2016). The table also includes a PRINT LABELS button and a search filter for LAB DATE set to Last 60 Days. The bottom of the interface shows pagination information: Showing 1 - 6 of 6 items, Show: 10, and navigation arrows.

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
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

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

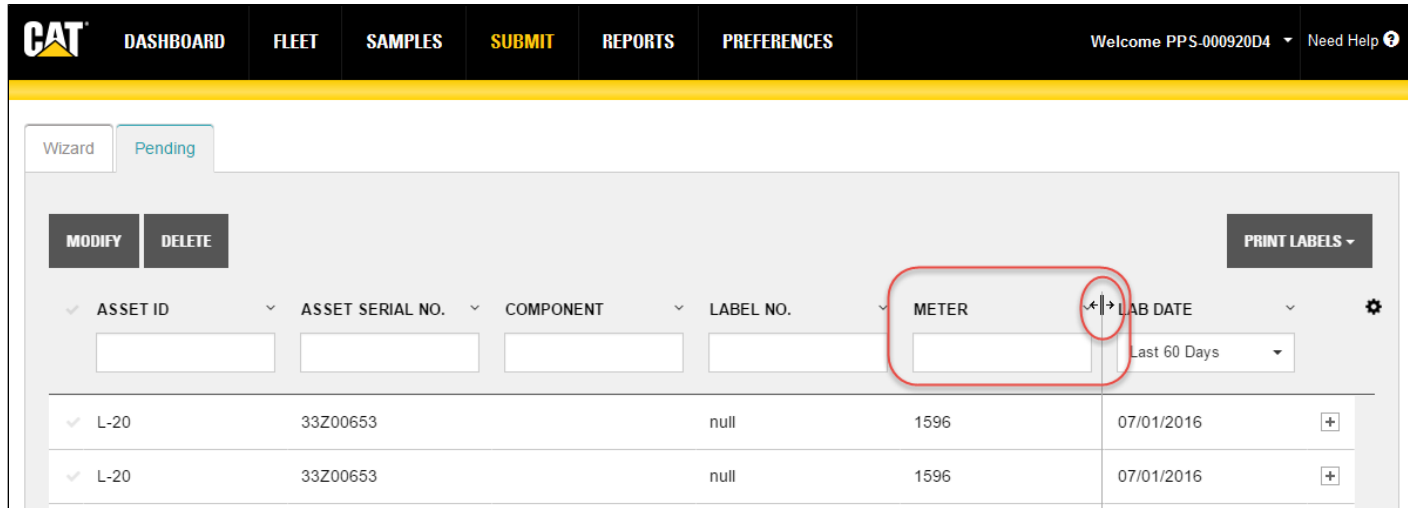
ASSET ID	ASSET SERIAL NO.	COMPONENT	LABEL NO.	METER	LAB DATE
L-20	33Z00653		null	1596	07/01/2016

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 table of data. The table has columns for 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 resizing 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.