



S.O.S Web User Guide

March 2020

Chrome is the preferred browser for this application.

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LOG ON TO SOS IN MY.CAT.COM

SOS is an element of my.cat.com and can be accessed in several ways:




Login to my.cat.com or use the link from the Oil Lab website oillab.co.nz Login using your CWS credentials.

If you do not have a CWS go to my.cat.com site. Beneath the log in icon, there is a sign-up button. Select this to register

 Username

This field is required.

 Password

This field is required.

SIGN IN

Don't have an account? [Sign Up](#)

[Forgot Username](#) [Forgot Password](#)

This will redirect you to the registration page where you can create your CWS. Make sure you read the requirements of the username and password or you may have complications with future applications.

Please ensure you complete the 4 steps of registration. Someone will be in touch once your account has been registered with your dealer.

when accessing via my.cat.com, in the OVERVIEW menu, scroll down to the QUICK LINKS widget and select S•O•S application

A screenshot of the my.cat.com website interface. At the top, there is a black navigation bar with the CAT logo on the left and four menu items: "OVERVIEW", "ASSETS", "OPERATIONS", and "MORE". The "OVERVIEW" item is highlighted with a red box. Below the navigation bar is a grey header area with the word "OVERVIEW" in large, white, sans-serif font. Underneath this is a white section titled "QUICK LINKS" in bold, black, sans-serif font, which is also highlighted with a red box. Below the "QUICK LINKS" header are four links, each preceded by a blue chain-link icon: "Buy Parts", "Cat MineStar™ Health Equipment Insights", "Cat Asset Intelligence", and "S•O•S application". The "S•O•S application" link is highlighted with a red box.

NAVIGATION, MEANING OF ICONS, BUTTONS AND TERMS USED

You can find your way around the application by clicking on the menus listed at the top of the page.

DASHBOARD – Contains a welcome future providing notes and updates from your dealer. The dashboard is interactive and allows you to customize widgets that summarize sample information.

FLEET – Allows you to view, find and manage assets and components. You can also access sample history, create graphs and export data from the FLEET menu.

SAMPLES – Allows you to view all sample history and then select a sample to view its details, export historical data, create a graph or generate the SOS report.

SUBMIT – Allows you to create barcoded labels for samples to be sent to the lab. You can also reprint, modify or delete labels that you have already created.








REPORTS – There are a few select reports that you can generate. These reports will be emailed to you, they do not open or download from the application





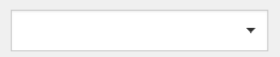
PREFERENCES – Allows you to create and manage custom filters/searches. You can also create component sets where components and assets can be grouped to generate barcode labels for the group.

Any text in blue represents a link that will take you to further detail relating to that text and functionalities. These links include:

Column / Text	Example	Description
ASSET ID	TR55	Breakdown of components and sample history.
LAB NUMBER	T210-47108-0875	Opens the sample details, test results and previous sample history. Can perform functions such as graph, action items, attachments, export data and create sample report.
COMPONENT	HYDRAULIC SYSTEM	Show sample history for component.

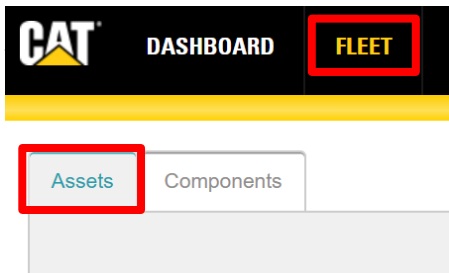
Health Icons represent the Evaluation of the sample.

HEALTH ICON	DESCRIPTION
 Urgent Action Required	Highest level of alert on a completed sample. Stop, Diagnose and Repair
 Action Required	Action is required based on the sample results. Diagnose and Repair.
 Monitor Component	Monitor, Proceed with Caution or Investigate
 No Action Required	Sample results are normal, and no action is required.
 No Comment	Special circumstance or record only.
 Not Interpreted In Process Pending	The lab has received the sample and it is being processed through the lab. A new lab number T210-xxxxx-xxxx is assigned. The sample will be 'in progress' in the status column If the sample in has the Not interpreted Icon but no T210-XXXXX-XXXX number then the sample has a barcoded label and has not yet been received by the lab; the sample will be 'Pending' in the status column
 Maintenance	A Maintenance Event was logged in SOS. This is typically an indication of oil change or component change/rebuild.

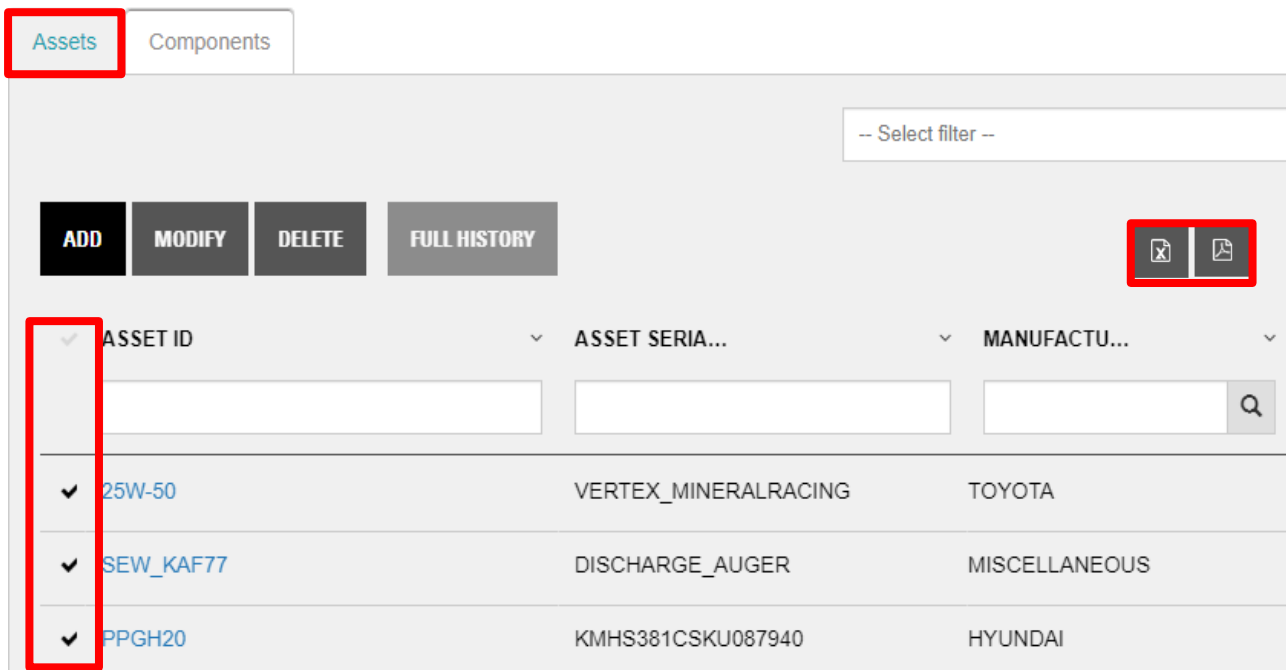
NAME	BUTTON	DESCRIPTION
Excel Button		Downloads selected information into an .xls spreadsheet
PDF Button		Downloads pdf document(s) of selected information
Graphing tool		Create a graph showing trending of an analytes or components against each other for one test type.
Search function		The magnifying glass on any data field brings up the lookup table. Use the description field to search. If you start typing in the fields with the magnifying glass at end of text field, a list of matches will appear. Select the appropriate choice.
Drop down boxes		Click on the down arrow and choose an option from the list.
Sorting	SAMPLED DATE ▾	Sorting can be applied to columns that have a small arrow.

VIEW A LIST OF ALL ASSETS IN THE SOS PROGRAM

Go to the FLEET menu and choose the Assets tab at the top a listing of all Assets will be shown.



To export the Asset list, select all or some of the assets using the check mark on the left and choose either .xls or pdf. The document will open in the browser.

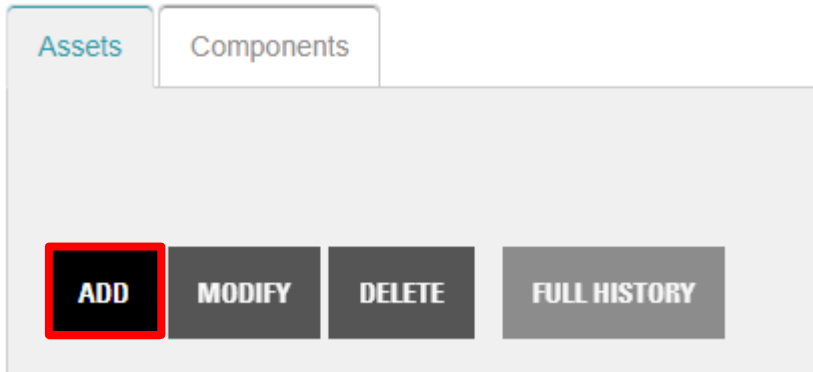
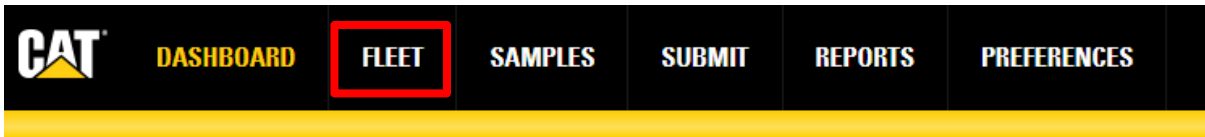


The image shows the main interface for viewing the asset list. At the top, there are two tabs: 'Assets' and 'Components'. The 'Assets' tab is highlighted with a red box. Below the tabs, there is a search filter dropdown menu with the text '-- Select filter --'. Below the search bar, there are four buttons: 'ADD', 'MODIFY', 'DELETE', and 'FULL HISTORY'. To the right of these buttons, there are two icons for exporting the data: a document with an 'X' (representing .xls) and a document with a printer icon (representing PDF). Below the buttons and icons, there is a table with three columns: 'ASSET ID', 'ASSET SERIA...', and 'MANUFACTU...'. Each column has a dropdown arrow. The table contains three rows of data. The first row has a checkmark in the 'ASSET ID' column, followed by '25W-50', 'VERTEX_MINERALRACING', and 'TOYOTA'. The second row has a checkmark in the 'ASSET ID' column, followed by 'SEW_KAF77', 'DISCHARGE_AUGER', and 'MISCELLANEOUS'. The third row has a checkmark in the 'ASSET ID' column, followed by 'PPGH20', 'KMHS381CSKU087940', and 'HYUNDAI'. The 'ASSET ID' column is highlighted with a red box.

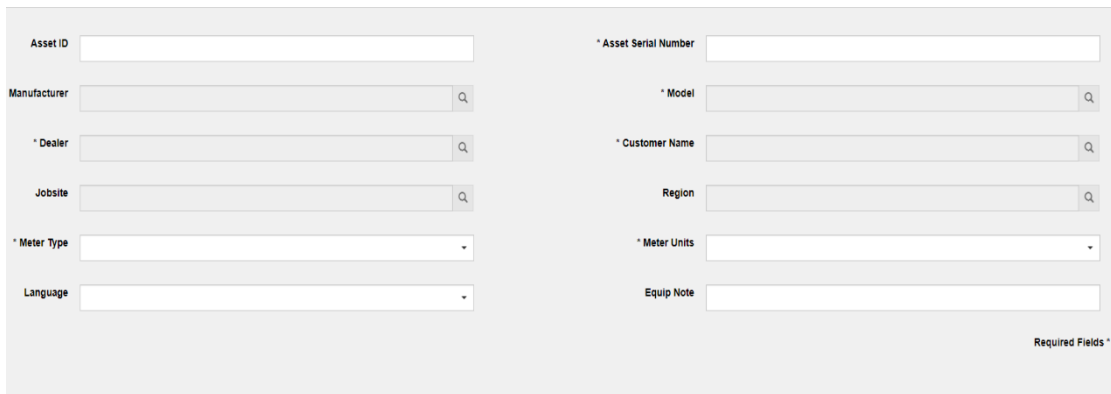
ASSET ID	ASSET SERIA...	MANUFACTU...
✓ 25W-50	VERTEX_MINERALRACING	TOYOTA
✓ SEW_KAF77	DISCHARGE_AUGER	MISCELLANEOUS
✓ PPGH20	KMHS381CSKU087940	HYUNDAI

ADD A NEW ASSET TO THE SOS PROGRAM

Go to the FLEET menu – Click ADD



Add Asset ID, Asset Serial Number, Manufacturer, Model, Dealer (T210 Gough Analytical Lab), Customer Name, Meter Type, Meter Units

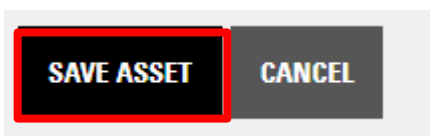


The image shows the asset creation form. It contains the following fields:

- Asset ID (text input)
- Asset Serial Number (text input)
- Manufacturer (text input with search icon)
- Model (text input with search icon)
- Dealer (text input with search icon)
- Customer Name (text input with search icon)
- Jobsite (text input with search icon)
- Region (text input with search icon)
- Meter Type (dropdown menu)
- Meter Units (dropdown menu)
- Language (dropdown menu)
- Equip Note (text input)

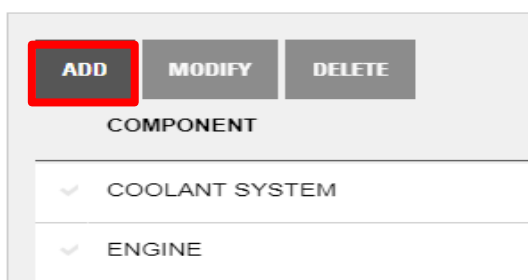
A 'Required Fields *' label is located at the bottom right of the form.

Click Save Asset



Scroll down to the bottom and click ADD under components (Caterpillar makes, and models will auto populate components)

COMPONENTS



Search in the description field (hit enter to populate your search) select your component and

COMPONENT LOOKUP

NAME	DESCRIPTION	
<input type="text"/>	<input type="text" value="eng"/>	
<input checked="" type="checkbox"/> ENG	ENGINE	
<input type="checkbox"/> ENG_AUX	ENGINE AUX	
<input type="checkbox"/> ENG_LOW	ENGINE LOWER	
<input type="checkbox"/> ENG_MA	ENGINE MARINE	
<input type="checkbox"/> ENG_MA_MID	ENGINE MARINE MIDSHIP	
<input type="checkbox"/> ENG_MAIN	ENGINE MAIN	
<input type="checkbox"/> ENG_NAT_GA	ENGINE NATURAL GAS	
<input type="checkbox"/> ENG_RR	ENGINE REAR	
<input type="checkbox"/> ENG_IND	ENGINE INDUSTRIAL	

click OK and SAVE on the next page

ADD COMPONENT

* Description	<input type="text" value="ENGINE AUX"/>	Serial Number	<input type="text"/>
Manufacturer	<input type="text"/>	Model	<input type="text"/>
Install Date	<input type="text"/>	Sampling Interval	<input type="text" value="250"/>
Change Interval	<input type="text" value="250"/>	Install Interval	<input type="text"/>
Install Meter	<input type="text"/>	Install Meter	<input type="text"/>

Required Fields *

VIEW THE MOST RECENT SAMPLES

Using the SAMPLES menu to view the most recent samples

Always clear all filters before starting a new search.

Filter by 'LAB DATE' click blue text 'LAB NO.' to view history online or from here the sample SOS PDF report can be printed or the results can be exported into .xls for samples selected by a check mark to the left.

The screenshot displays the CAT software interface. At the top, a navigation bar includes 'DASHBOARD', 'FLEET', 'SAMPLES' (highlighted with a red box), 'SUBMIT', 'REPORTS', and 'PREFERENCES'. Below this, a filter dropdown is set to '-- Select filter --' with a 'Filter Details' link. A row of action buttons includes 'CLOSE SAMPLES', 'EDIT SAMPLE', 'DOWNLOAD RESULTS', and a document icon (highlighted with a red box). The main table has columns: 'HEALTH' (with a checkmark icon highlighted in a red box), 'LAB DATE' (with a dropdown menu highlighted in a red box), 'HEALTH HIST...', 'LAB NO.' (with a text input field containing 't210'), 'ASSET ID' (with a dropdown menu), and 'COMPONENT'. The table contains three rows of data, all for 'ENGINE' components.

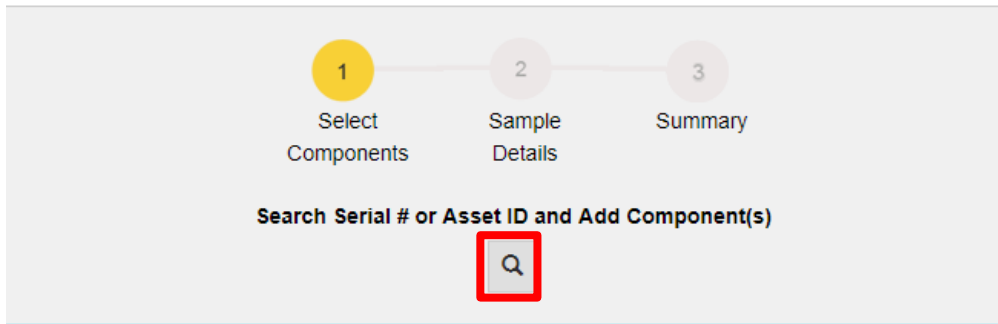
HEALTH	LAB DATE	HEALTH HIST...	LAB NO.	ASSET ID	COMPONENT
✓	29-Jan-2020	✓ ✓ ✓	T210-50029-2236	# 7	ENGINE
✓	12-Sep-2017	✓ ✓ ✓	T210-47255-0064	# 7	ENGINE
✓	10-Apr-2017	✓	T210-47100-0061	# 7	ENGINE

CREATE A BARCODED LABEL FOR A SAMPLE

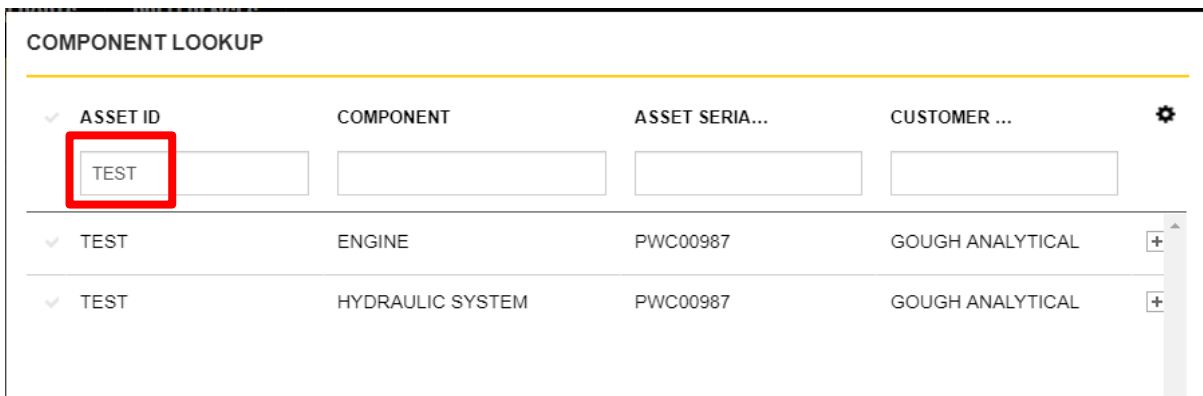
Go to the 'Submit' menu



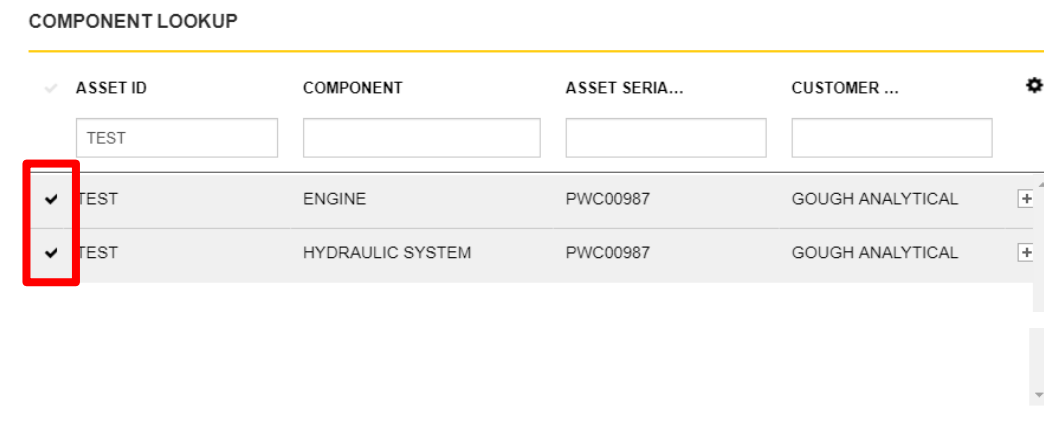
Click on 'Component Look-up'



Search for your component's – Enter Asset ID or Serial number and hit the 'enter' key

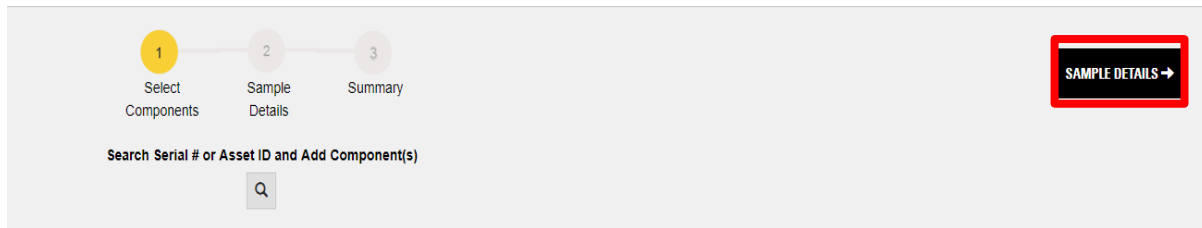


Select all components you want to sample and click 'OK'



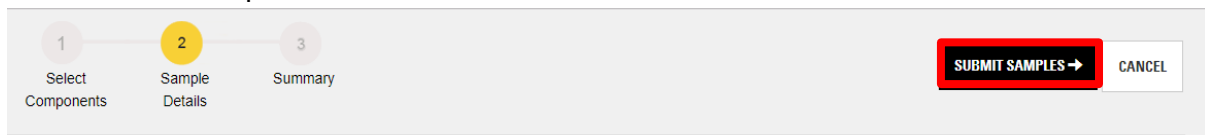
OPTIONAL – Repeat steps 3&4 to add another more component (this can be from a different Asset)

Click 'Sample details'

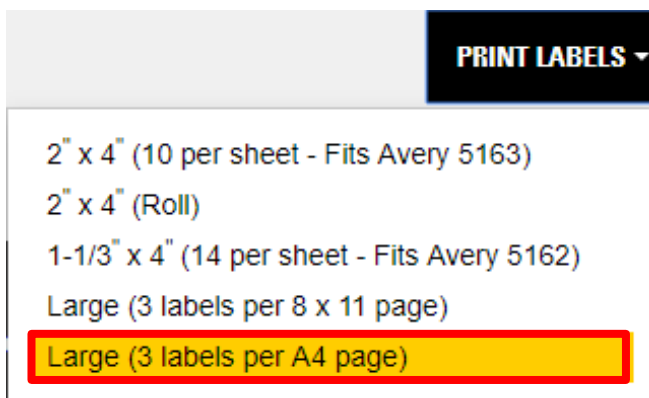
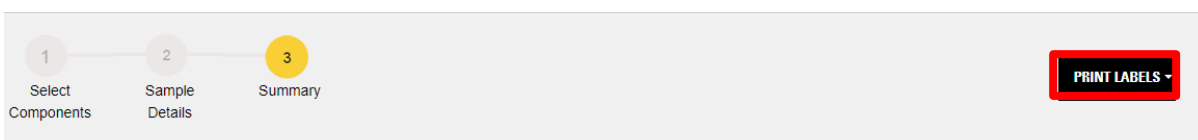


Fill out the following information where applicable

Click 'Submit Samples'



Click 'Print Labels' and select 'LARGE (3 Labels per A4 page)'



ADD A MAINTENANCE EVENT

Maintenance events include changing out the oil, changing the brand/grade of oil, rebuilding or replacing the component.

Go to the FLEET menu, find the asset you are looking for. Click the blue text

The screenshot shows the CAT software interface. At the top, there is a navigation bar with the following menu items: DASHBOARD, FLEET (highlighted with a red box), SAMPLES, SUBMIT, REPORTS, and PREFERENCES. Below the navigation bar, there are two tabs: Assets and Components. Under the Assets tab, there are four buttons: ADD, MODIFY, DELETE, and FULL HISTORY. Below these buttons are three dropdown menus: ASSET ID, ASSET SERIA..., and MANUFACTU... Each dropdown menu has a search input field. The ASSET ID field contains the value '12345' (highlighted with a red box). The ASSET SERIA... field contains the value 'annie'. The MANUFACTU... field contains the value 'F G WILSON'. Below the search fields, there is a table with the following data:

ASSET ID	ASSET SERIA...	MANUFACTU...
12345	ANNIETEST	F G WILSON

Select the component and click on ADD MAINTENANCE button

The screenshot shows two buttons: SUBMIT SAMPLES and ADD MAINTENANCE (highlighted with a red box).

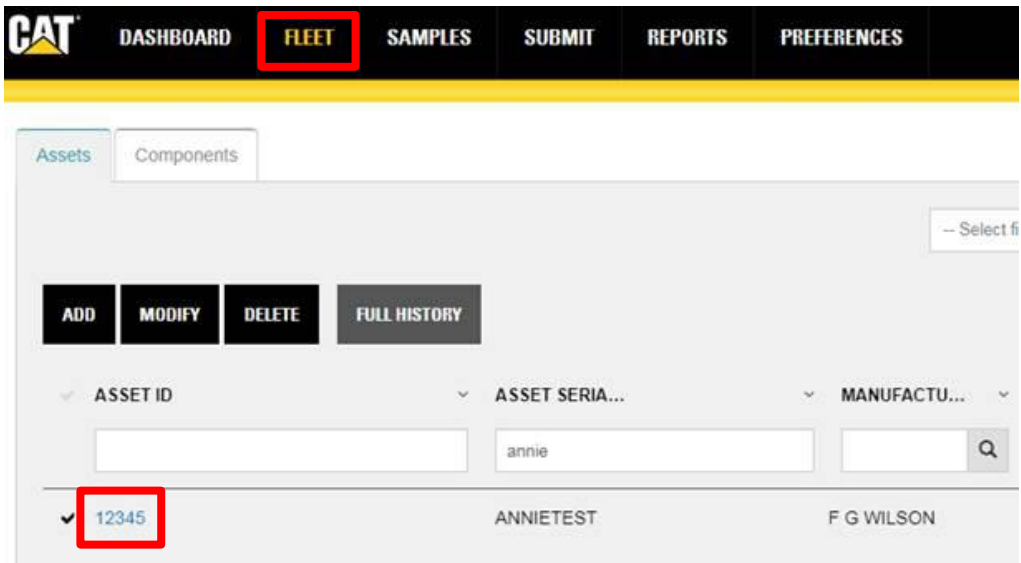
The screenshot shows a list of components with checkboxes. The first two items are 'Check All' and 'Uncheck All'. The third item is 'ENGINE' with a checked checkbox (highlighted with a red box).

Select the type of event from the drop-down list in the pop-up window.
(The data entry fields will change depending on what type of event is selected from the list.)

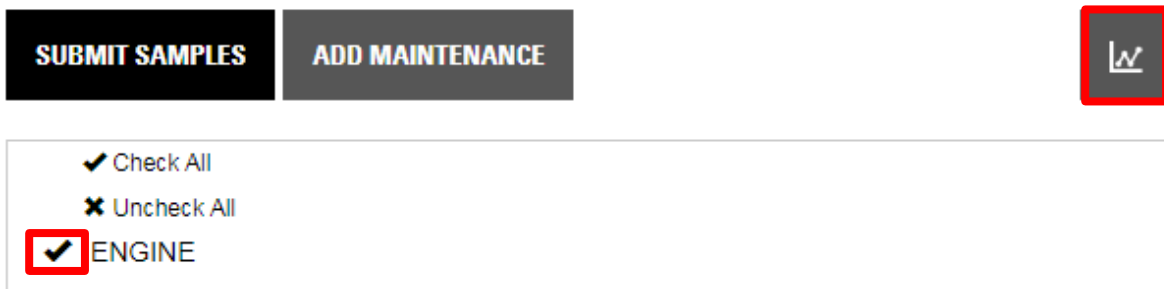
The screenshot shows a pop-up window titled 'ADD FLUID MAINTENANCE : ENGINE///'. The window has a 'Select Event' dropdown menu (highlighted with a red box) with the following options: Fluid Change (highlighted in yellow), Filter Change, Fluid Addition, Rebuild, and Component Change. Below the dropdown menu, there are several input fields: Maintenance Date, Prev Meter Reading, Fluid Brand, Fluid Weight, Fluid Type, and Notes. The Fluid Brand and Fluid Weight fields have search icons. The Filter Change field is a dropdown menu. At the bottom right of the window, there are two buttons: ADD (highlighted with a red box) and CLOSE. A 'Required Fields *' label is also visible at the bottom right.

CREATE A GRAPH THAT TRENDS ELEMENTS FOR A COMPONENT

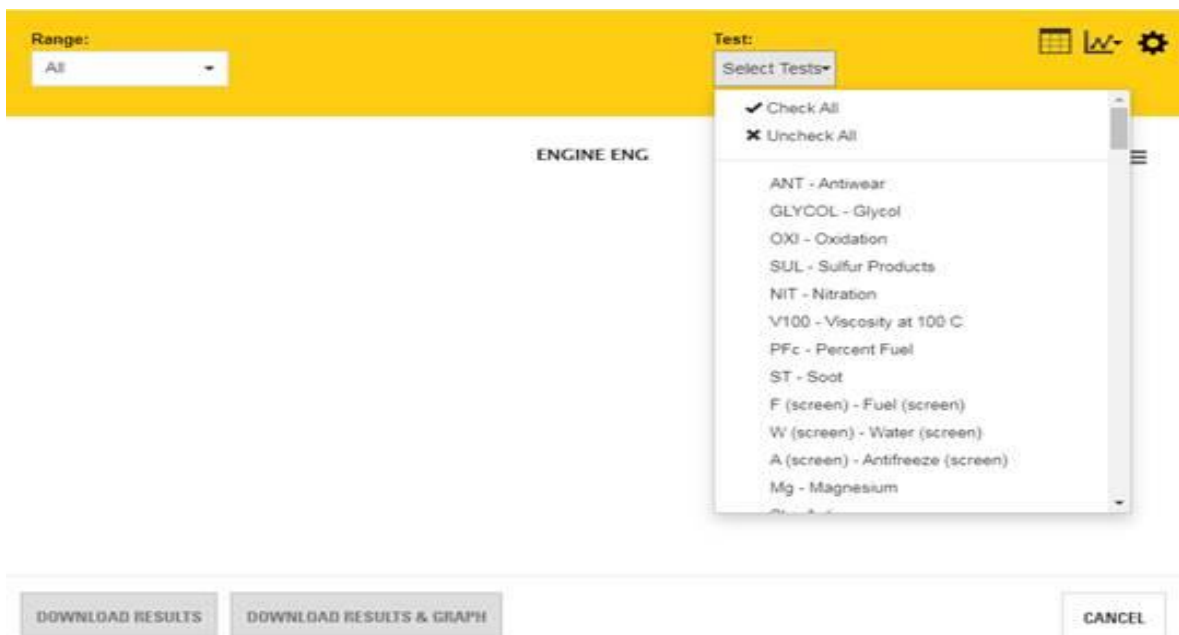
Go to the FLEET menu and click the Components tab. Apply filters using the column headers to find the C. Click on the asset that you want to graph.



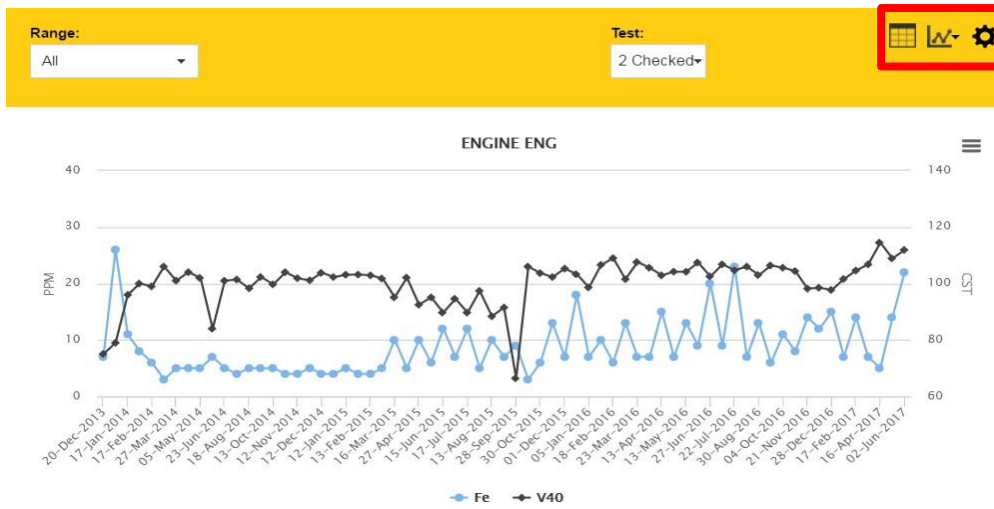
Select the component. **Only one component can be selected.**



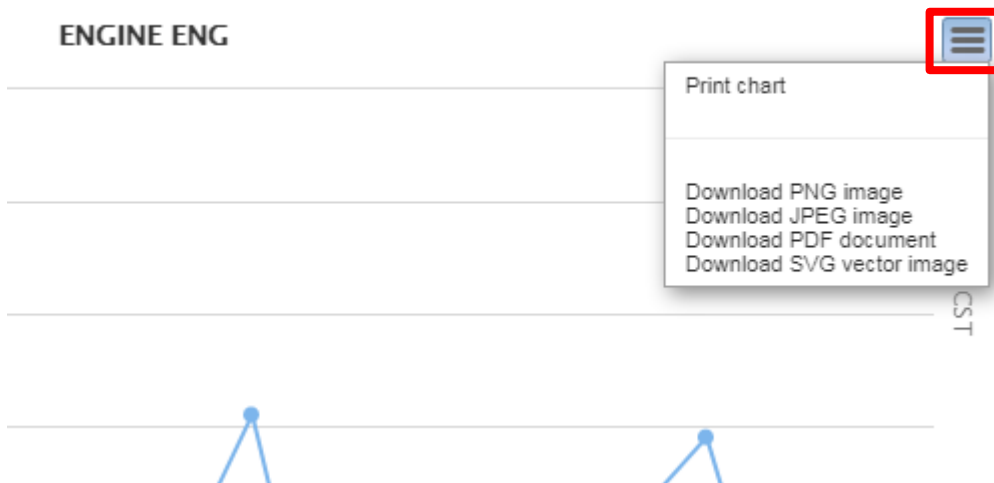
The pop-up graph panel will be blank and ready to create the trend graphs. Build the graphs:



Once the graph has been created, any of these parameters can be changed.



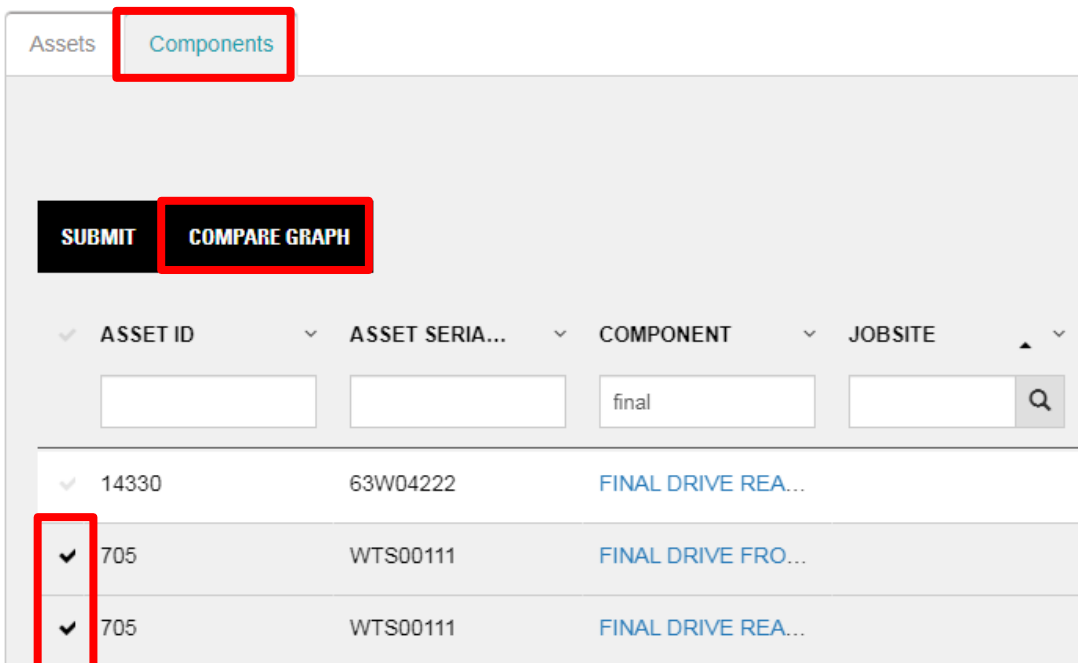
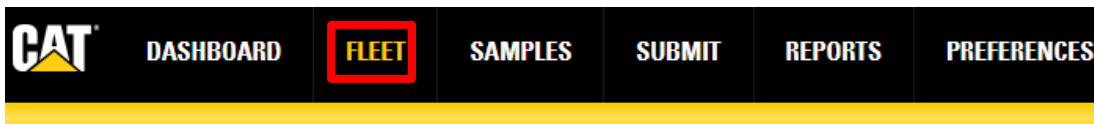
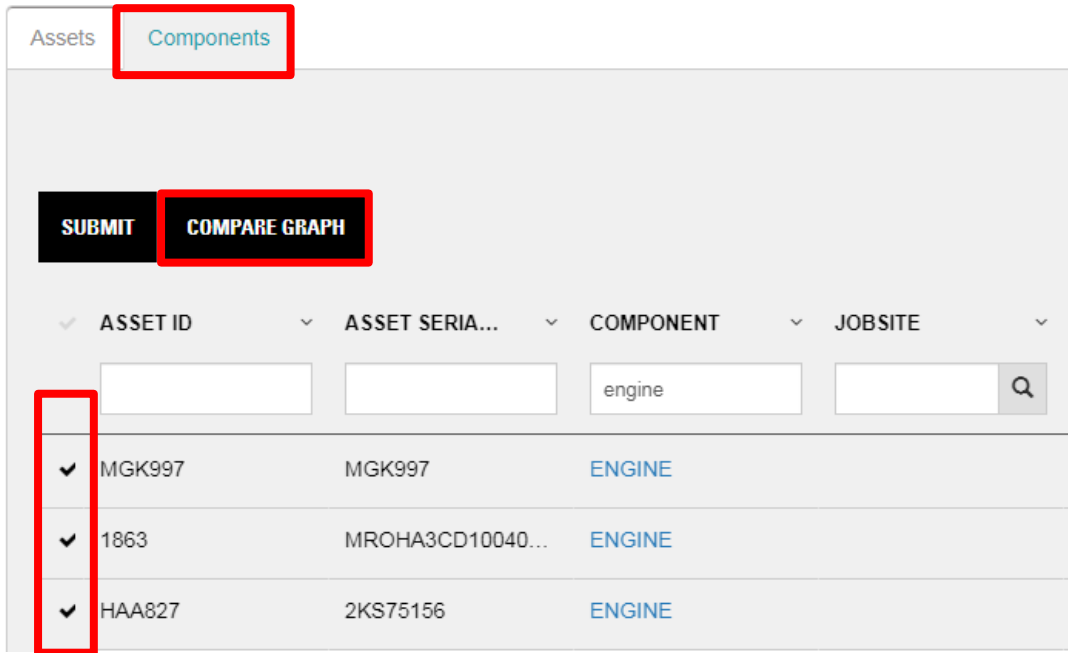
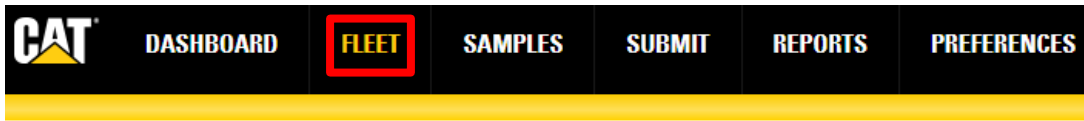
The graph can be saved in different formats. This will download through the browser in the application.



CREATE A GRAPH THAT TRENDS ELEMENTS BETWEEN COMPONENTS

Go to the FLEET menu and select the Components tab.

Apply the required filters. You can compare components on the same different assets.

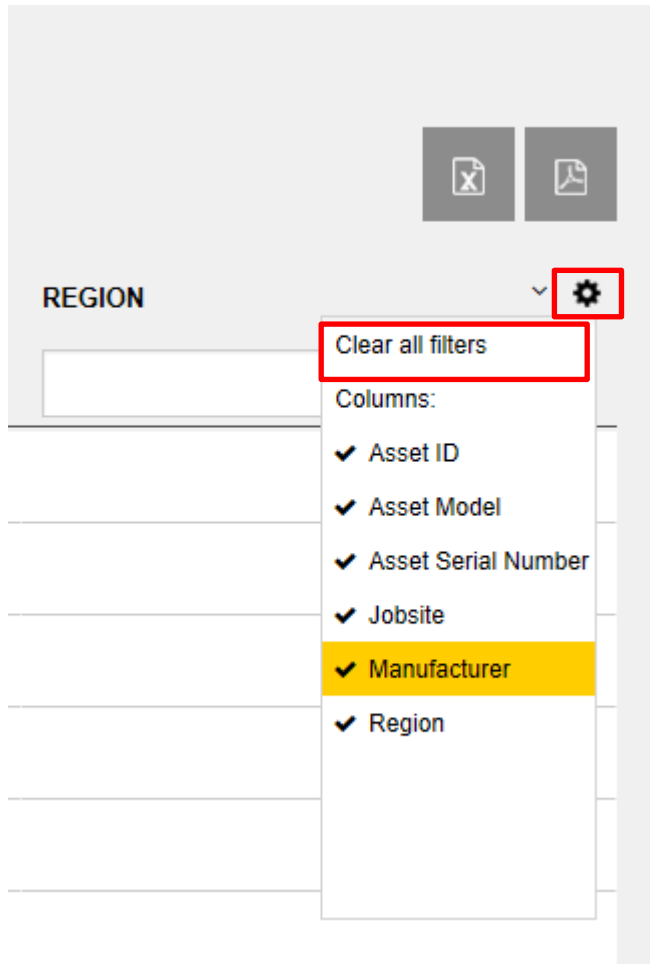


This graph works the same as the previous

FREQUENTLY ASKED QUESTIONS

WHY CAN'T I SEE MY EQUIPMENT?

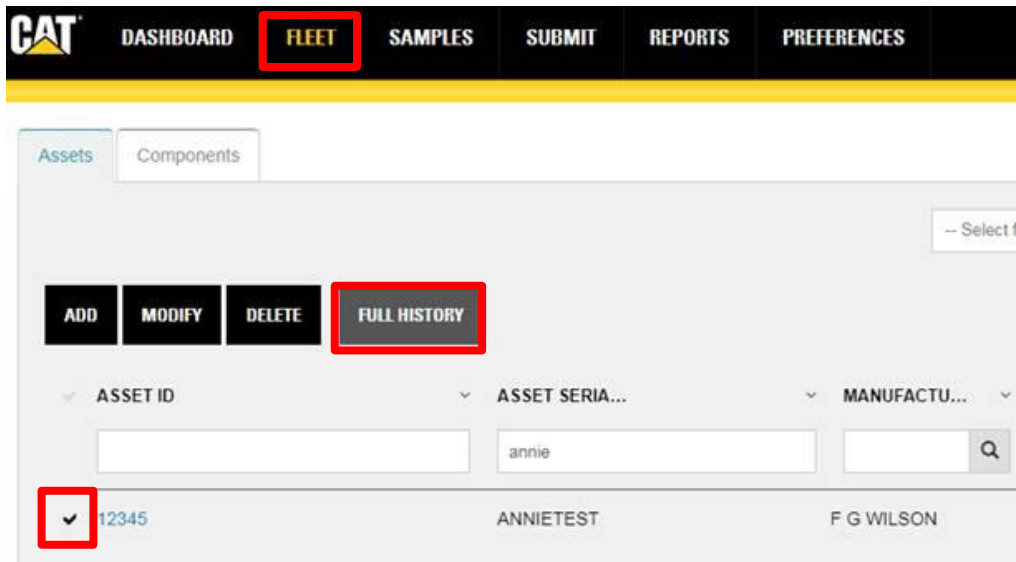
You can search for samples and equipment using filters at the top of each column. When you leave a page, these filters will remain the next time you open SOS Web. To remove these filters, click on the cog at the right-hand side of the page and click “clear all filters”



Other issues with seeing your fleet, please contact the SOS lab.

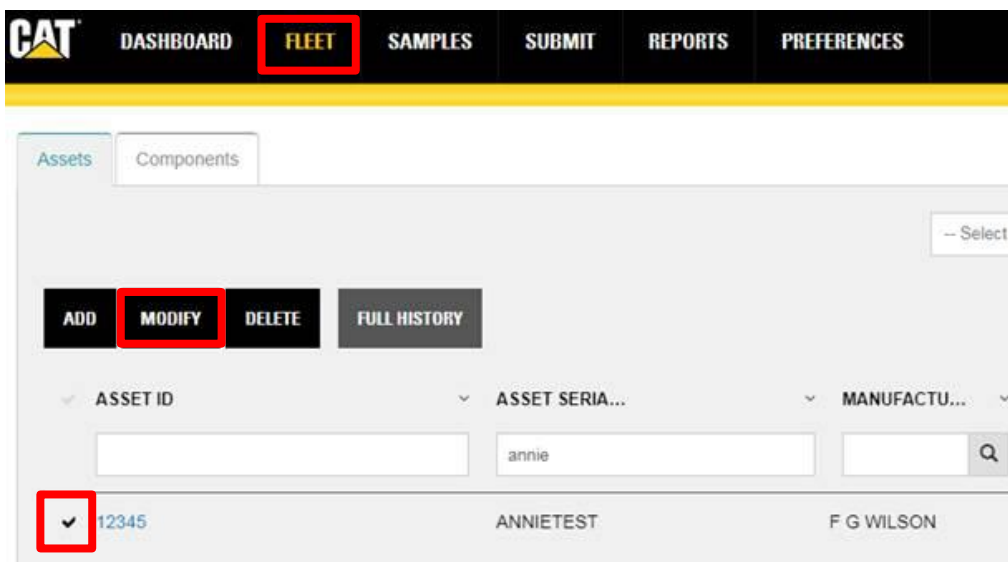
HOW CAN I VIEW THE HISTORY OF A COMPONENT?

Go to the FLEET menu. Find the asset, select the asset using the tick box on the left of the asset ID. Click on FULL HISTORY button



CAN I MAKE ANY CHANGES TO MY EQUIPMENT?

Go to the FLEET menu. Find the asset, select the asset using the tick box on the left of the asset ID. Select MODIFY



All fields with a * are mandatory. Serial numbers may not contain more than 20 or any special characters. You can also add your components for the piece of equipment. Once all changes have been made, click the 'Save asset' button at the bottom.

MODIFY ASSET

Asset ID	<input type="text" value="goughtest3"/>	* Asset Serial Number	<input type="text" value="GOUGHTEST3"/>
* Manufacturer	<input type="text" value="CATERPILLAR"/>	* Model	<input type="text" value="619B"/>
* Dealer	<input type="text" value="WILLIAM ADAMS PTY. LTD"/>	* Customer Name	<input type="text" value="WAPL TEST CUSTOMER"/>
Jobsite	<input type="text" value="WAPL TEST SITE"/>	Region	<input type="text"/>
* Meter Type	<input type="text" value="Distance"/>	* Meter Units	<input type="text" value="KILOMETER"/>
Language	<input type="text" value="English"/>	Equip Note	<input type="text"/>

Required Fields *

COMPONENTS

<input type="button" value="ADD"/>	<input type="button" value="MODIFY"/>	<input type="button" value="DELETE"/>			
COMPONENT	COMPONENT...	COMPONENT...	COMPONENT...		
<input type="checkbox"/>	ENGINE				
<input type="checkbox"/>	TRANSMISSION ...				
<input type="checkbox"/>				

If you want to modify or delete components, select the component using the left-hand tick box and modify or delete accordingly.

COMPONENTS

<input type="button" value="ADD"/>	<input type="button" value="MODIFY"/>	<input type="button" value="DELETE"/>			
COMPONENT	COMPONENT...	COMPONENT...	COMPONENT...		
<input type="checkbox"/>	ENGINE				
<input type="checkbox"/>	TRANSMISSION ...				

TROUBLE SHOOTING

CREATING BARCODE LABELS

- All the components that are listed in the SUBMIT Wizard will be transferred into labels when you click on the SAMPLE DETAILS button to create the labels.
- Click on the magnifying glass and choose from the LOOK-UP table searching in the description field. Otherwise, start typing in the field and wait for a match to appear in yellow underneath and select from the list. Do not just type information and tab to the next field since the field will accept whatever you type, if there is no match then what you typed will not transfer to the label or the lab.
- Fields with drop down list arrow - always click on the arrow and select from the list using the mouse. Otherwise the information will not transfer to the label or the lab

CREATING A NEW ASSET

- When you create a new Non-Caterpillar asset, the system may automatically add additional components. You'll manually delete these unwanted components.
- Adding a NON-Cat model/asset that is not listed in the Manufacturer or Model LOOK-UP TABLES, choose OTHER for both and enter the details in the Equipment Note. The SOS lab will update this.
- If an Asset Serial Number is already allocated to an existing account you will not be able to create it. Contact the SOS lab to have this Serial Number allocated to your account.

COLUMN HEADERS AND FILTERS

- There is a LAB DATE against Pending Samples and Maintenance Events. This is the date on which you created the label or event.
- When filtering using the HEALTH and STATUS column headers, always Uncheck All first and then select the items you want to filter. Not doing an Uncheck All will not clear the previous filter you had.

LOOK-UP TABLES

- When using LOOK-UP tables, the first column is typically a coded format and we suggest you do not use this column to search.
- The results returned in a LOOK-UP table may not contain all the matching results. The table has a limited number of rows, so try searching again or differently if you cannot find what you are looking for.
- Hit enter on your keypad to populate searches.

CONTACT US

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