

CAT® VISIONLINK RELEASE NOTES

August 2021

VISIONLINK

NEXT GENERATION ASSET MONITORING & FLEET MANAGEMENT

VisionLink Offers:

- Customizable dashboards
- Dynamic reporting capabilities
- Actionable information to make key decisions to help you improve your bottom line
- Navigate easily through the intuitive and mobile-ready interface
- Available in multiple languages

WHAT'S NEW

- Administrator
 - The process of adding users to VisionLink is changing. As of 20 August 2021, users are added to VisionLink accounts as SSO users with a Caterpillar username.

NEW FEATURES AND ENHANCEMENTS

Administrator

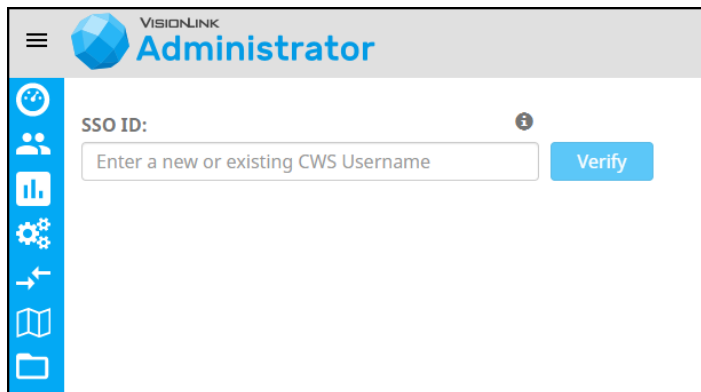
The process of adding users to VisionLink is changing. As of 20 August 2021, users are added to VisionLink accounts as SSO users with a Caterpillar username. We are changing this process because we are transitioning VisionLink users to CWS (Cat Corporate Web Security) SSO authentication. As a result:

- VisionLink Administrators must add VisionLink users to their organization's accounts as SSO users with Caterpillar usernames.
- E-customers can now obtain a Caterpillar username and VisionLink access in a single step.

This process can take one of two paths:


Scenario 1: VisionLink user has a Caterpillar username (CWS ID)

1. As a VisionLink Administrator, sign in to VisionLink Administrator, select the account you want to add a user to, and in **User Management** select **Add SSO User** from the **Actions** bar. (**Add New User** is no longer an option.)
2. Enter an SSO ID and click **Verify**.



The screenshot shows the VisionLink Administrator web interface. At the top, there is a navigation bar with the VisionLink logo and the word "Administrator". Below this is a sidebar with several icons representing different functions. The main content area features a form with the label "SSO ID:" and a text input field containing the placeholder text "Enter a new or existing CWS Username". To the right of the input field is a blue button labeled "Verify".

3. If the SSO ID is in use, the system returns the matched user's information:
 - Email
 - First Name
 - Last Name
 - Phone Number
 - Company
 - Country



SSO ID:
vldmincws3

If this is the user you want to set up, please complete the form. Otherwise, cancel and start over.

Email:
vldmin2@yopmail.com

First Name:
Adam

Last Name:
Villa

Phone Number:
201-555-1787

Asset Security:
 Allow access to asset security

Job Type: (Optional)
Select

Job Title: (Optional)
Select

Company:
Villa Construction

Address:
United States

Address Line 2 (Optional)

Save

Important! You must verify this is the user you want to set up as a VisionLink SSO user and add to this account.



4. Update the VisionLink-specific fields. Some of the fields are required, and some are optional:

- Application permissions
- Asset Security
- Job Type
- Job Title
- Address
- Language
- Preferences

Application Permissions: (definitions)

UF US UP A 3D L

Select

UF Administrator	✕
UP Administrator	✕
A Administrator	✕
US Administrator	✕

Asset Security:

Allow access to asset security

Job Type: (Optional)

Select

Job Title: (Optional)

Select

5. Click **Save** when you are finished. When you see the success message, you'll know:

- The SSO user is added to the account in VisionLink.
- The SSO user will receive an email with VisionLink sign-in instructions.

Important! You must verify the user receives the email and follows the instructions, because the user must sign in to VisionLink to complete the setup process.

Scenario 2: VisionLink user does not have a Caterpillar username (CWS ID)

1. As a VisionLink Administrator, sign in to VisionLink Administrator, select the account you want to add a user to, and in **User Management** select **Add SSO User** from the **Actions bar**.
2. Enter an SSO ID and click **Verify**. Because the user does not have a CWS ID, you will see a new screen asking if you want to create a new e-customer:

Create CWS ID

We could not find the CWS username. Create a new e-customer CWS 'mona1018'?

Dealers, contact your administrator to request a CWS ID. This process creates only e-customer accounts.

Important! This process is only for setting up new VisionLink users as e-customers. All other user accounts must obtain their CWS credentials via their internal process. If you are not creating an e-customer, do not continue this process. Instead, click Cancel.

3. If this user is to be set up as an e-customer, click **Create**.
4. If the username is available, complete the form fields. **At this point, you cannot change the SSO ID.**

VISIONLINK
Administrator

SSO ID:
mona1018

This username is available. Please continue the e-customer account setup by completing the fields below.

Email:

First Name:

Last Name:

Phone Number:
United States +1

Application Permissions: (definitions)

UF US UP A 3D L

Select

Asset Security:

Allow access to asset security

Job Type: (Optional)

Select

Job Title: (Optional)

Select

Company:

Address:

United States

Address Line 1 (Optional)

Address Line 2 (Optional)

City (Optional)

State (Optional) Zip Code (Optional)

Language:

Select

Preferences:

Click here to set this user's default preferences.

Save

- Click **Save** when you are finished. When you see the success message, you'll know:
 - The e-customer is added to the account in VisionLink with a default password.
 - The e-customer will receive an email to reset their password to access VisionLink.

Important! You must verify the user receives the email and follows the instructions, because the e-customer must sign in to VisionLink to complete the setup process.