SIS2GO Help Document

Caterpillar: Confidential Green

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Getting Started

Introduction

The SIS2GO application provides disconnected access for viewing parts and service information. The application is optimized for a complete mobile experience and includes the following benefits:

- A simple, intuitive, and efficient user experience
- Accessibility for all dealer and customer users of SIS 2.0
- Availability on Windows, IOS, and Android platforms
- Power to maintain, diagnose, and repair your Cat equipment while off-line
- Live updates to provide the latest, up-to-date service, and parts information
- Power to order genuine Cat parts for your Cat equipment

The information within this help document is to assist the user in understanding the features of SIS2GO. For more information, contact us at SIS2GO@cat.com.

Note: SIS2GO is the replacement for the current disconnected SIS USB solution.

The screenshot provided in this help may be slightly different from those displayed in the SIS2GO application.

User Access to SIS2GO

The following are prerequisites to access SIS2GO:

- Active Corporate Web Security (CWS) ID and Password.
- Active SIS use profile.

1. If you do not have an active CWS, please contact your respective SIS Administrator at your local dealership.
    - For Dealer users that do not have access to SIS2GO or need elevated access to service information, please contact your respective SIS Administrator at your dealership.
    - For Custom users that do not have access to SIS2GO, please submit a request for a SIS account from the SIS Administrator at your local dealership or create an account through Parts.cat.com (PCC). Only access to part information will be provided.

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- For Customer Users needing access to service information, please contact your SIS Administrator at your local dealership

Launch SIS2GO Mobile Application

To launch SIS2GO mobile application, follow these steps:

1. Select the SIS2GO icon from your device to launch the application.
   Note: The application operates on the following operating systems: Android 9.0 and above, iOS 13.0 and above and Windows 10.0 and above.
2. At first launch, annually or if the Cookie Notice is updated, the *Cookies Setting* pop-up appears for users to review the SIS2GO cookie notice. Select **Accept** or **No Thanks** after reviewing the cookie notice.
   Note: The Cookie Notice can be referenced anytime from the **Main Menu > Cookie Notice** option.

3. At first launch of SIS2GO or when policies are updated, an acceptance of our terms and conditions is provided for the user to review. The Terms and Conditions link contains our Privacy Policy, End User License Agreement (EULA), Copyrights Notice and Open Source Software Notice. After reviewing the policy and license agreement, select the '**I have read our Terms and Conditions**' check box and **Agree** if you accept our terms and conditions.

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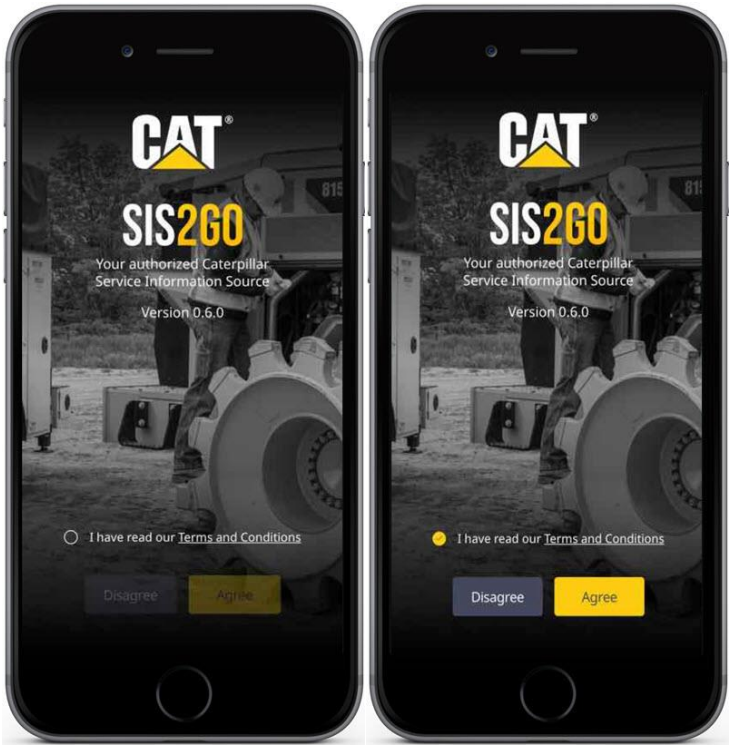
Note: The policy and license agreement can be referenced anytime from the **Main Menu** > **Privacy** & **Legal** option.



4. The *Sign In* screen appears.

   Note: The Sign In with CWS ID provides 30 days of continuous access while off-line. The Sign In with Fingerprint ID provide 90 days of continuous access

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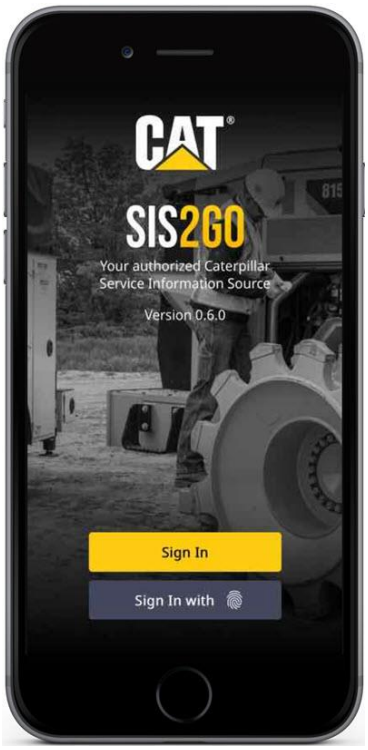
while off-line.



5. Select **Sign In /** Sign In with . The *CWS* log in screen appears.

6. Enter **Username** (CWS ID) and **Password** at the login prompt. Select **Log In** to verify your credentials. The SIS2GO *Home* screen appears, upon

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verification of the credentials.

What's New?

Addition of Notifications Tab

The SIS2GO application users are now notified in application when a prefix is downloaded, cart is saved to My Lists, cart is processed/saved/sent, updates available for downloaded prefix and prefix download fails via Notification tab.

The count on the Notification tab with Red indicates the number of newly available notifications. Notifications can be deleted once viewed. A maximum of 50 notifications can be presented in the Notifications screen .The recent notifications are listed on top of the list.

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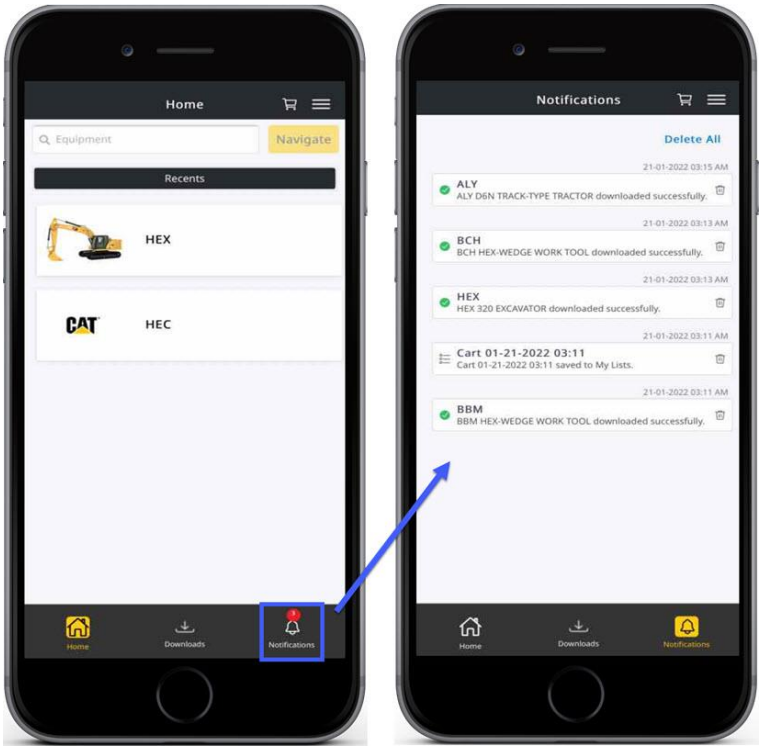

Ability to Download and View Product Configuration Information

When users navigate to parts and service information with a serial number, a Dashboard tab is now present. Within Dashboard tab users will have access to the product configuration information.

The product configuration includes Machine Build Date, Engine Build Date, Part Number and Group Part Number. Users can navigate to the specific parts by selecting the part number or group part number.

You can save the product configuration information while you are online and review the saved production configuration information while offline as well. **Note**: The **Save** option is disabled if you are offline and it's enabled when you are online.

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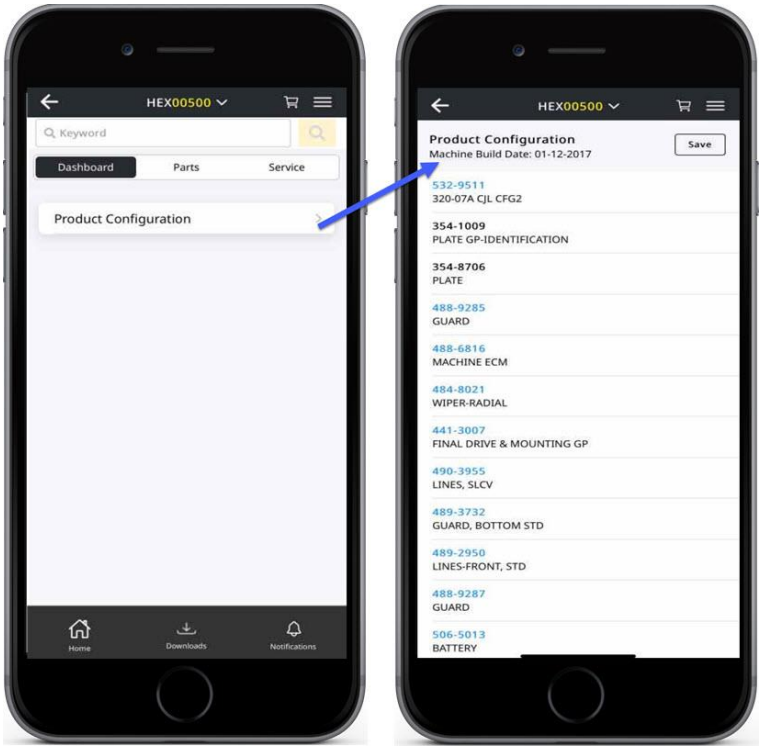

Improvements in Feedback

The existing Feedback feature is now enhanced and available as form in the SIS2GO application. Primary dealers of SIS2GO can report issues with screenshots and submit the feedback to SIS2GO support team. The improvements made for better categorization of issues in taking actions.

All other users will still be redirected to the device's default email application when the Feedback option is selected.

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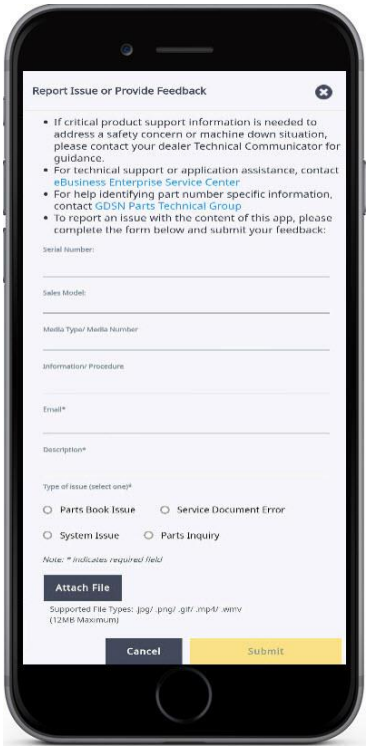

Inclusion of Upload List Option to Download List of Equipment by Prefix

SIS2GO users now have the ability to upload a bulk equipment list by saving a list of prefixes in a .csv file. The Upload List option is available in **Downloads** > **In Progress** tab to help users populate and upload a bulk equipment list very quick.

Valid .csv file with prefixes are eligible for upload. During the .csv file upload, already downloaded/failed prefixes will not be selectable. Other valid prefixes will be selectable for download. Only selected prefixes will be added to the download queue.

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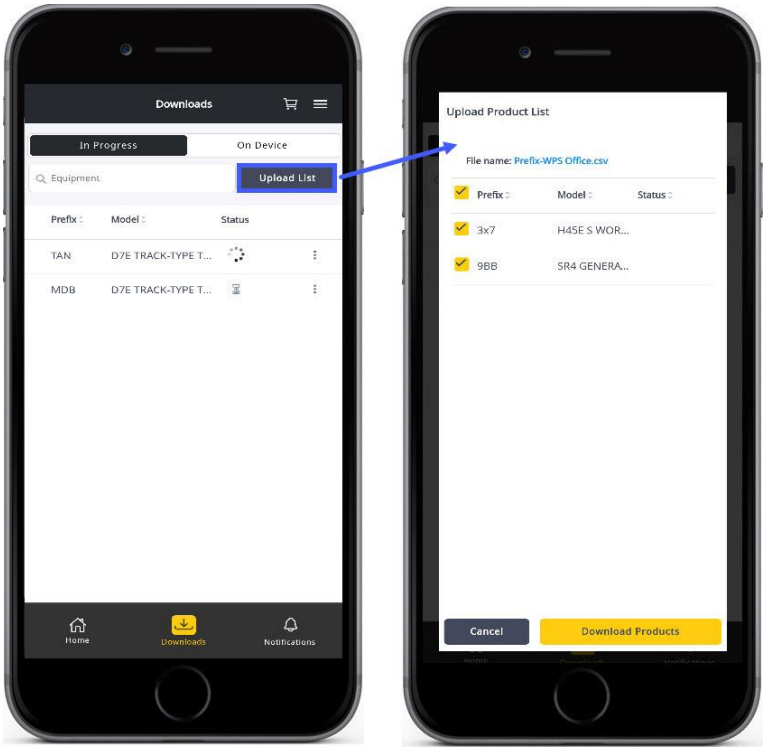
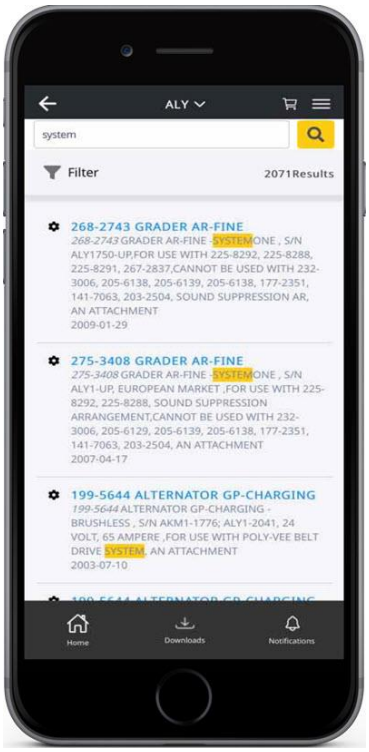


General UI Improvements

UI improvements in SIS2GO:

- In the keyword search results screen the keyword is highlighted in yellow.



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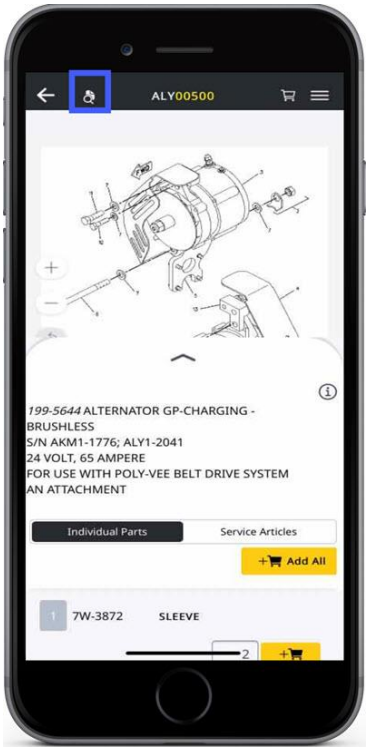
- Users can use the find keyword within the displayed part information or service information to explore specific details.



Enhancements in Cart Screen

UI changes made in Cart and My List tabs are:

- Improved Note, Quantiy and Add to Cart icons.
- A Serial Number field is now available for part(s) which were added to the cart from parts information.

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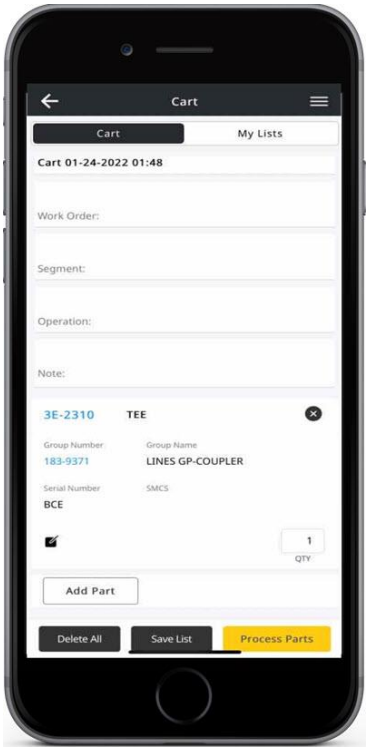
- Part number in blue indicate that the part is hyperlinked and redirects the user to the search screen to view the related parts information when selected.



Home

Within the Home screen, the user can search equipment with serial number or prefix, download equipment, and navigate to parts and service information for downloaded equipment.

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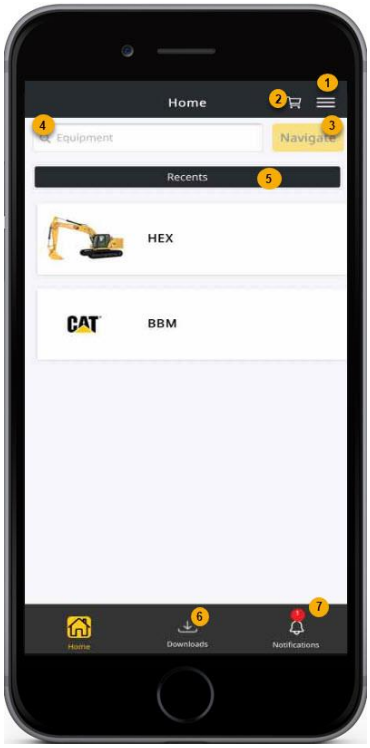

1. **Main Menu**
2. **Manage Cart**
3. **Navigate**: Navigation to parts and service information for downloaded prefixes
4. **Search Equipment Field**: Enter product family, sales model, prefix or serial number to search
5. **Recents**: Navigation to recently viewed equipment
6. **Downloads**: Manage in progress and downloaded equipment
7. **Notifications**: View the list of available notifications

To search and download part/service information for equipment, follow these steps:

1. In the *Equipment* field on the *Home* screen, enter a valid product family, sales model, serial number or prefix to search the available equipment for

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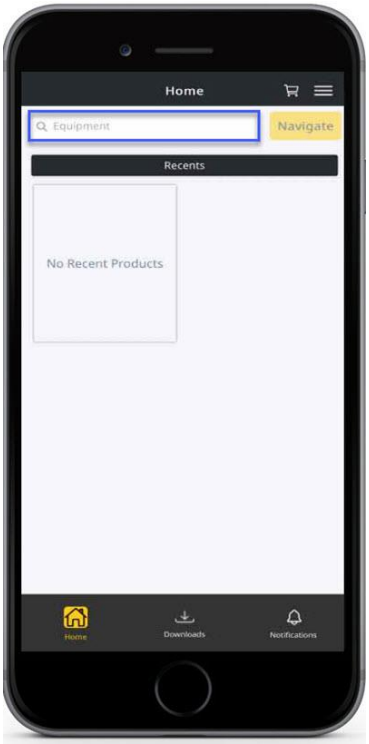
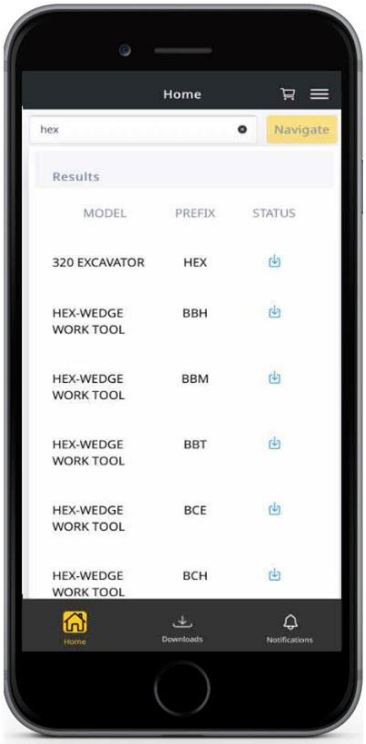
download.



2. The search results are auto-populated.



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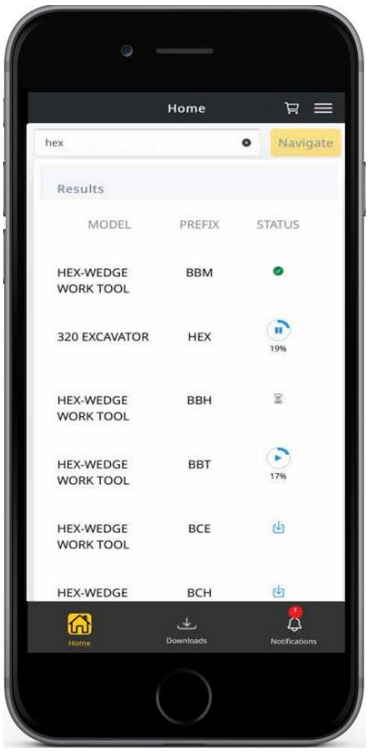
3. Select **Download** icon to start the download for the selected prefix.



The following are the different statuses available for a file:

- **Download** : The prefix is available for download
- **Pause** : Option to pause the download
- **Resume** : Option to resume the download
- **Download In Progress** : Download is in progress
- **Download Completed** : Download has successfully completed
- **Pending Download** : Download is in the queue
- **Updates Available** : Updates are available for downloaded prefix
- **Failed** : Download has failed

4. After a successful download, select the prefix within the search results or select **Navigate** icon to view the parts and service information.
   Note: The Navigate icon is enabled if the provided prefix is valid and the file is

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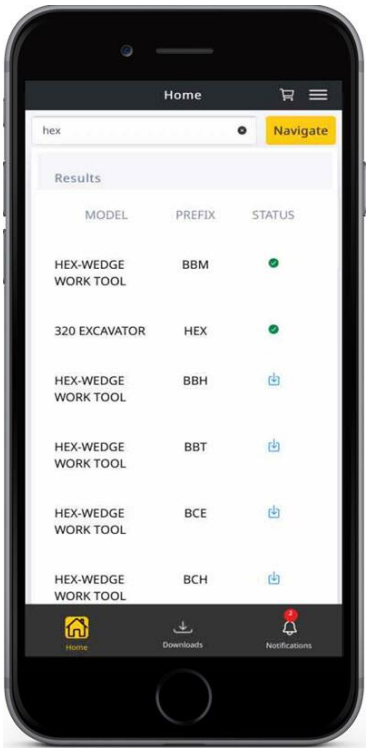
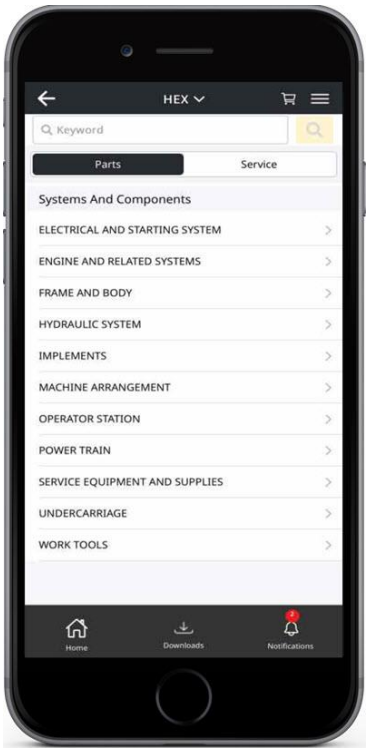
successfully downloaded.



5. The *Parts and Service* screen appears.



Parts Information

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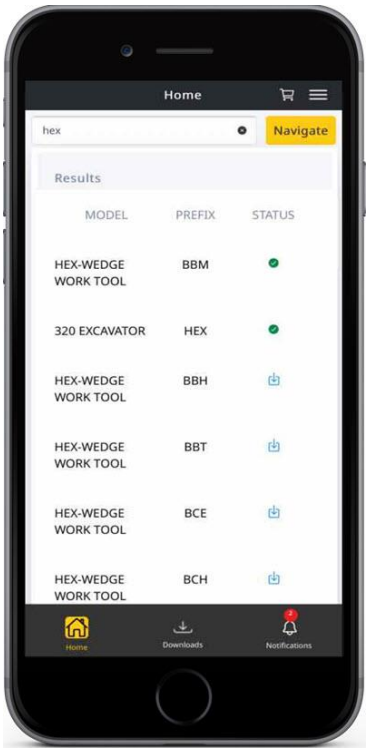
The Parts tab allows the user to view the related parts information for the selected prefix. The user can search parts and service information by a keyword or part number in the Keyword Search field.

To view parts information, follow these steps:

1. In the *Equipment* field on the *Home* screen, enter a valid prefix or serial number. If the prefix is successfully downloaded, select the prefix within the search results or select **Navigate** icon to view the parts and service information.

   Note: The Navigate icon is enabled if the provided prefix is valid and file is successfully downloaded. You can update your prefix or serial number search by selecting the **Down Arrow** icon near prefix.



2. The *Parts* screen appears. Under the *Parts* tab, Select the **System**, **Component** or **Arrow** icon to navigate through the parts information to view

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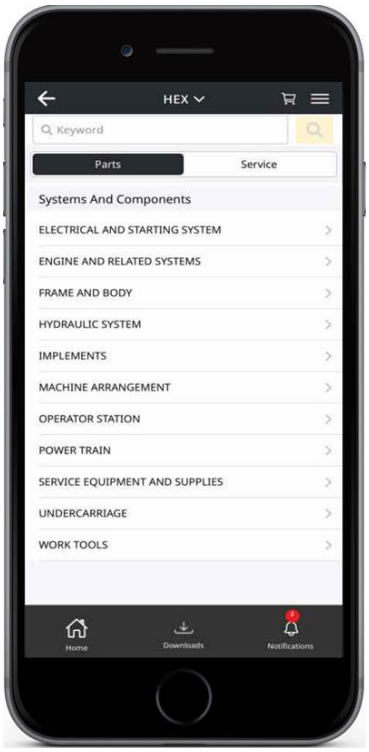
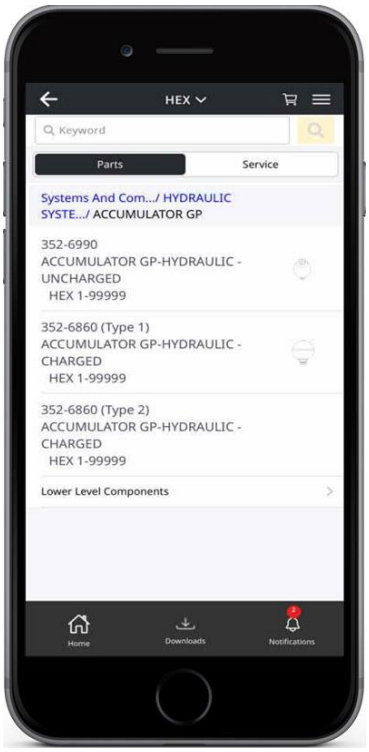
the part details.



3. Select the part name and description to view the part details.



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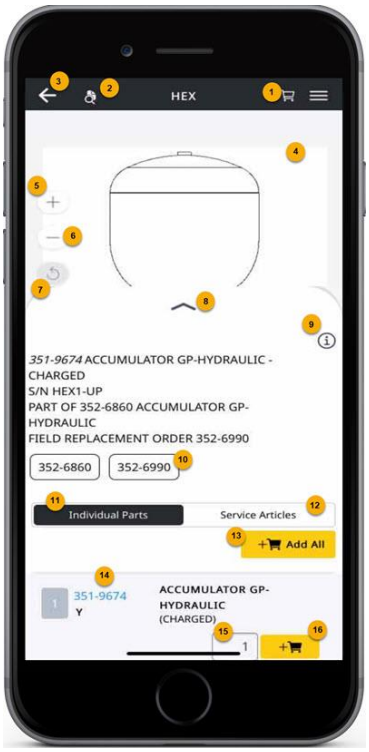
4. The *Parts Detail* screen appears.



1. **Manage Cart**
2. **Search**: Search keyword within *Parts Detail* screen
3. **Back**: Redirects user to the previous screen
4. **Graphic Pan**: Drag image
5. **Graphic Zoom In**: Pinch to zoom/Mouse scroll wheel/Keypad pinch to zoom
6. **Graphic Zoom Out**: Pinch to zoom/Mouse scroll wheel/Keypad pinch to zoom
7. **Graphic Reset**: Reset image view
8. **Draw Slider**: Drag to reposition drawer to view the full image or more part details in mobile/Click to view full image
9. **Information**: View SMCS code and page information
10. **Associated Part Hyperlink**: Redirects user to associated part
11. **Individual Parts**: List of parts
12. **Service Articles**: Links to related service information associated to part

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13. **Add All to Cart**: Adds all serviceable parts and quantities to the cart
14. **Part Hyperlink**: Redirects user to view associated details. **Note**: Part number must be blue to indicate hyperlink
15. **Quantity**: Option to change default quantity
16. **Add to Cart**: Adds individual part and quantities to the cart. **Note**: The Add to Cart option is not available for the parts that are not serviceable

Service Information

The Service tab allows the user to view the related service information for the selected prefix. The user can search parts and service information by a keyword or part number in the Keyword Search field.

Note: Access to the Service Information is based on your SIS Profile.

To view service information, follow these steps:

1. In the *Equipment* field on the *Home* screen, enter a valid prefix or serial number. If the prefix is successfully downloaded, select the prefix within the search results or select **Navigate** icon to view the parts and service information.
   Note: The Navigate icon is enabled if the provided prefix is valid and file is successfully downloaded. You can update your prefix or serial number search

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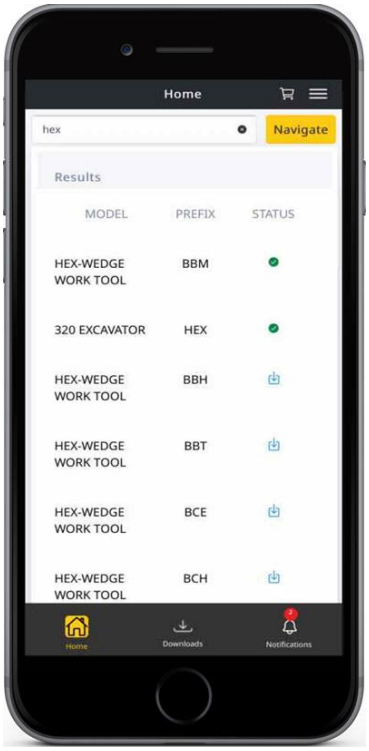
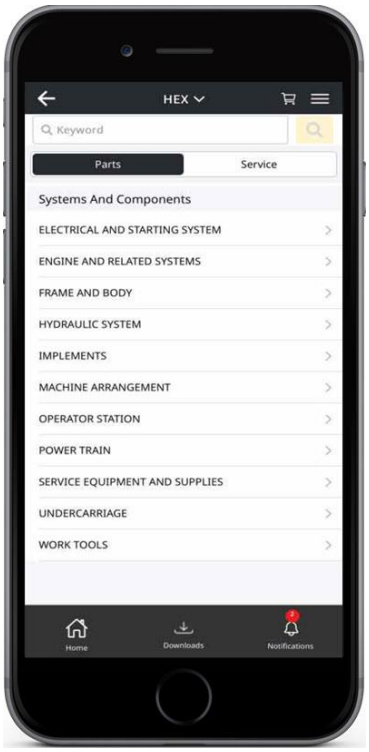
by selecting the **Down Arrow** icon near prefix.



2. The *Parts* screen appears.



3. Select **Service** tab to view the service information. Under the *Service* tab, select the Information Type, Procedure or **Arrow** icon to navigate through the service information to view the detailed procedures or information.

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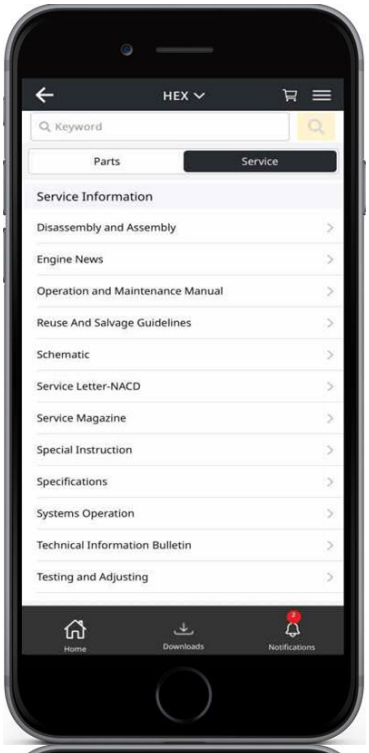

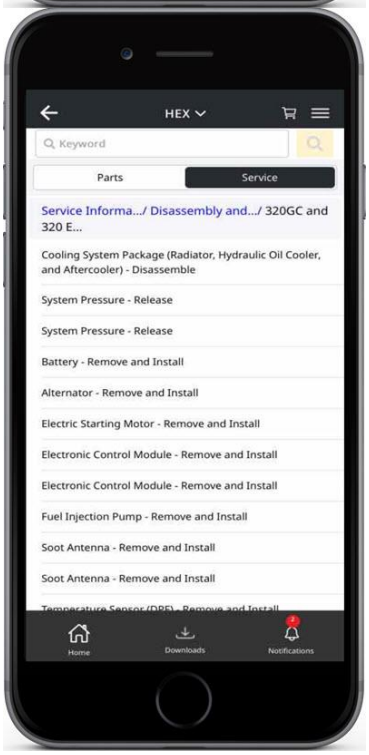

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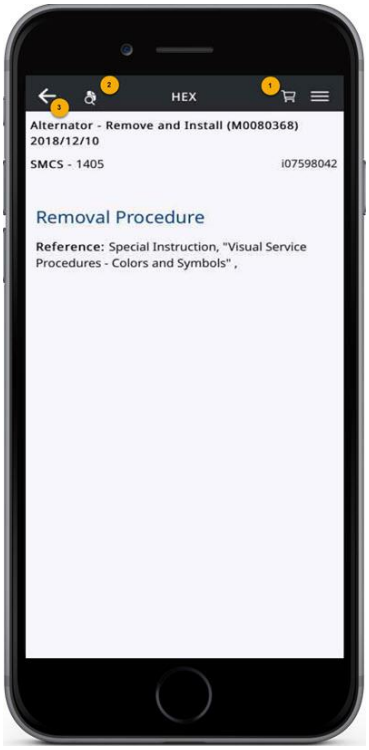

1. **Manage Cart**
2. **Search**: Search keyword within service information.
3. **Back**: Redirects user to the previous screen

Dashboard

Users can view the product configuration details for the downloaded equipment in the Dashboard tab when online. When users search for parts and service information with serial number, the Dashboard tab is available with product configuration details along with Parts and Service tabs.

To view product configuration details, follow these steps:

1. In the *Equipment* field on the *Home* screen, enter a valid prefix or serial number. If the prefix is successfully downloaded, select the serial number prefix within the search results or select **Navigate** icon to view the parts and service information.
   Note: The Navigate icon is enabled if the provided prefix is valid and file is

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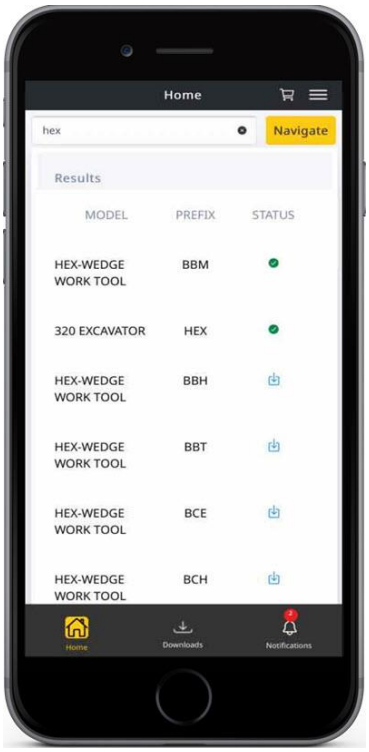
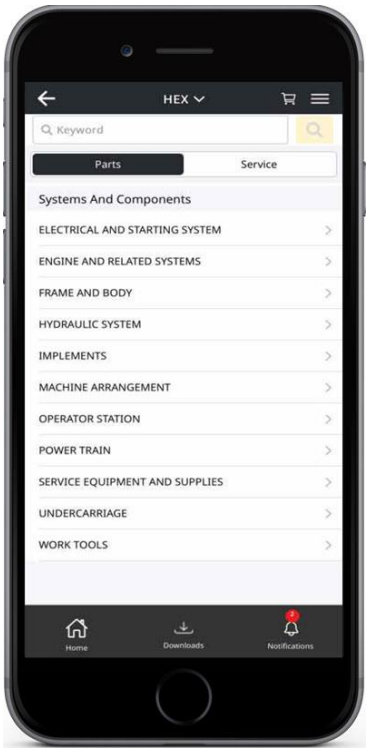
successfully downloaded.



2. The *Parts* screen appears.



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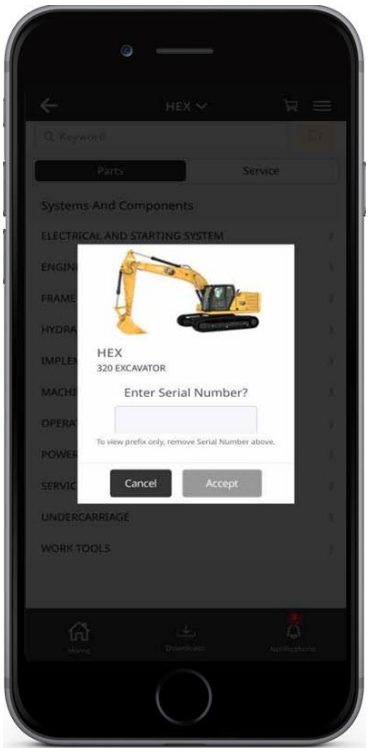
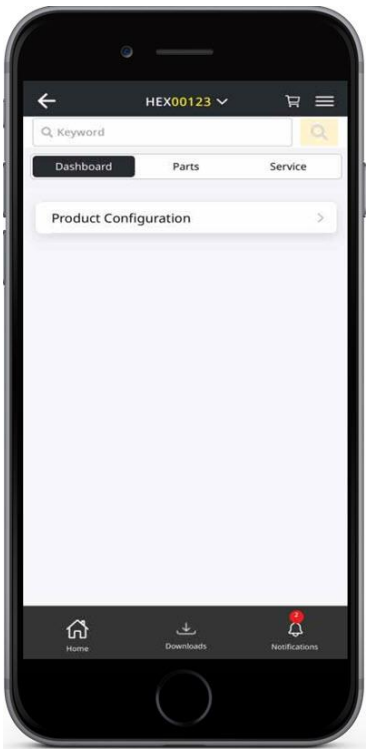
3. In the header, select **Down Arrow** icon near prefix, enter the **Serial Number** and click **Accept**.



4. The *Parts and Service* screen appears along with Dashboard tab.



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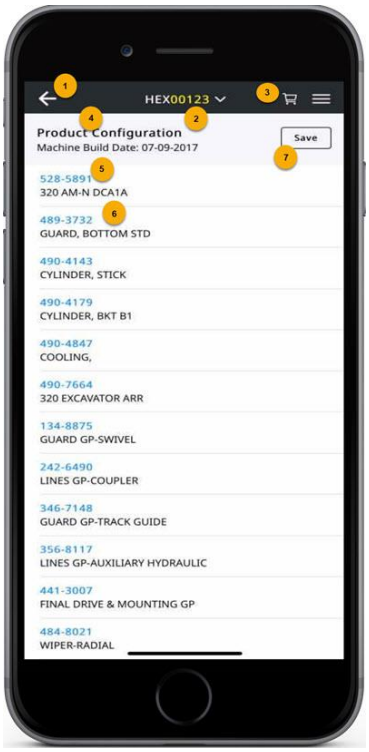
5. Select **Product Configuration** or **Arrow** icon > to view its details.



1. **Back**: Redirects user to the previous screen
2. **Serial Number with Prefix**
3. **Manage Cart**
4. **Product Configuration**: Includes Machine and Engine Build Dates.
5. **Group Part Number**: Redirects user to associated part. **Note**: Part number must be blue to indicate hyperlink.
6. **Part Number**
7. **Save**: Saves the product configuration details to your device to viewed while offline. **Note**: The Save option is disabled when offline and enabled when online.

Keyword Search

Users can search parts and service information by using the Keyword Search. The keyword search is available within the *Parts and Service* tab of downloaded equipment.

The following search criteria is allowed:

- Part Names

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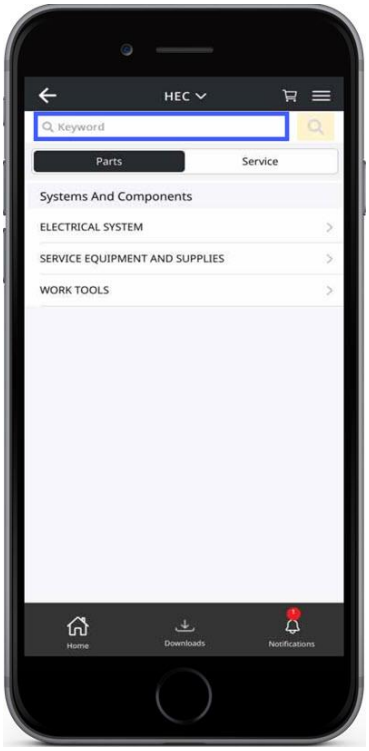
- Part Numbers
- Service Information Titles
- Text or Phrase
- Media Number

To search for information with keywords, follow these steps:

1. In the *Parts or Service* tab, enter a valid keyword or part number to search the downloaded parts and service information for the selected prefix, then select **Search** icon .



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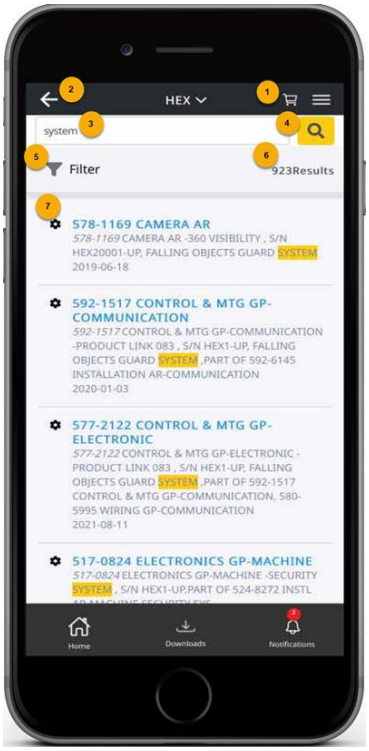
2. The following screen appears. As the search results are auto-populated, the entered keyword is yellow highlighted.



1. **Manage Cart**
2. **Back**: Redirects user to the previous screen
3. **Keyword Search**: Field to enter a keyword or part number to be searched
4. **Search**: Initiates the search of the entered keyword or part number
5. **Filter**: Option to refine the search results by Category, Information Type and/or system
6. **Result Count**: The number of results from your search
7. **Results**: Returned Parts and Service information results from entered search criteria. Select to view the Parts and Service information.

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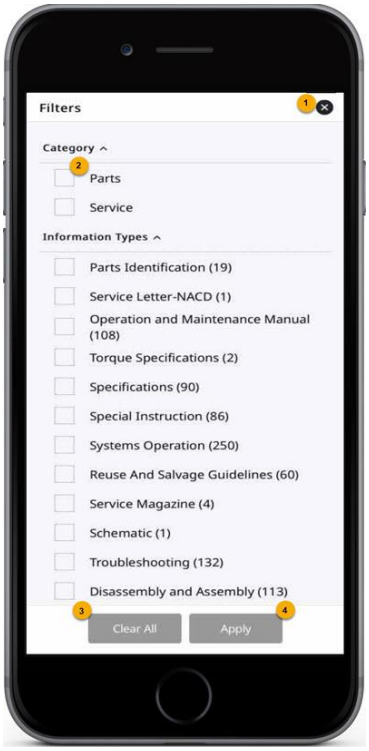
3. Select **Filters**. The *Filters* screen appears. Select any **Filters**, then select **Apply** to refine the search results.



1. **Exit**: Closes the filter option
2. **Check Box**: Select or deselect filter
3. **Clear All**: Clears all selected filters
4. **Apply**: Applies selected filters

4. The following screen appears. Select **Clear All** to remove applied filters.

   Note: The count available on the Filter icon indicates the number of selected

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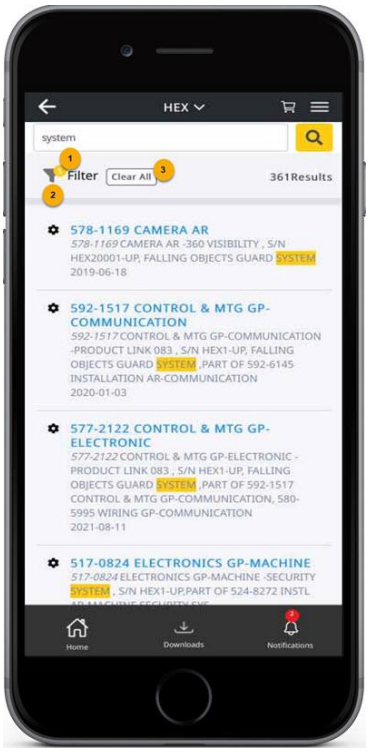
filters.



1. **Filter Count**: Number of applied filters
2. **Filter**: Option to refine the search results by Category, Information Type and/or System
3. **Clear All**: Clears all applied filters

Main Menu

The Main Menu contains the following user options:

- Feedback
- Help
- Privacy and Legal
- Cookie Notice
- Log Out
- Version of App

To access main menu, follow the step:

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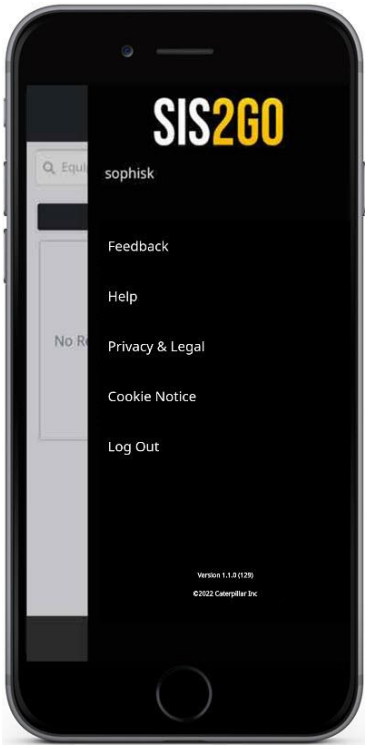
- Select **Main Menu** in the application header. The *Main Menu* screen appears.



Feedback

Primary dealers can report issues to the SIS2GO support team via the Feedback feature. Other users are redirected to the device's default email application to submit their feedback to the SIS2GO support team via the Feedback feature.

The accepted file formats are .jpg, .png, .gif and .wmv. A maximum of 12MB file size is allowed for attachments.

To send feedback via form, follow these steps:

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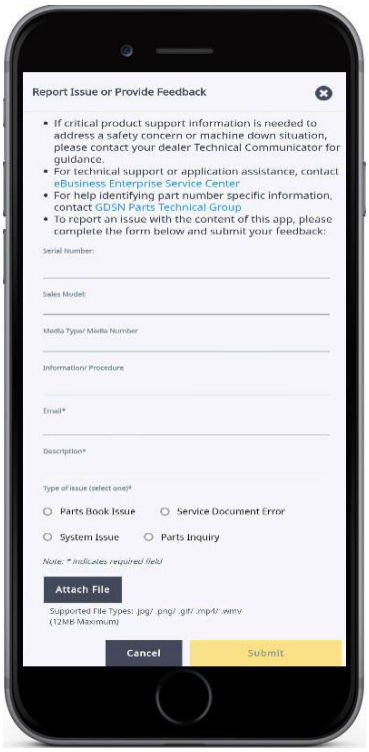
1. In the *Main Menu,* Select **Feedback**. The *Feedback* screen appears.



2. Enter the equipment's **Serial Number**, **Sales Model**, **Media Type**/**Media Number**, **Information/Procedure**, **Email** and **Description** in the respective fields.
3. Select **Type of issue** from the available options.
4. Select **Attach file** to add screenshots for the issue.
5. Select **Submit** to send feedback to the SIS2GO team.

To send feedback via email template, follow these steps:

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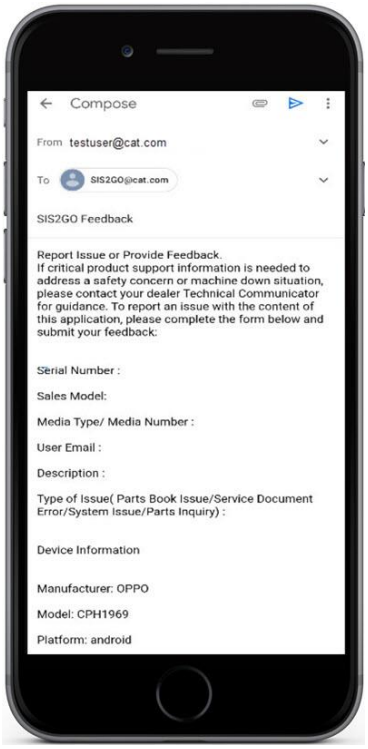
1. In the *Main Menu,* Select **Feedback**. An email template pop ups with mandatory fields to populate.



2. Enter the equipment's **Serial Number**, **Sales Model**, **Media Type**/**Media Number**, **User Email**, **Description**, **Type of Issue** and **Device Information** in the respective fields.
3. Select **Send**. The email is sent to the SIS2GO team.

Help

You can refer to the Help for in-depth SIS2GO documentation. The Help is search enabled and includes a Glossary with term definitions, an Index of important keywords and an option to mark your favorite topic.

To view application help, follow the step:

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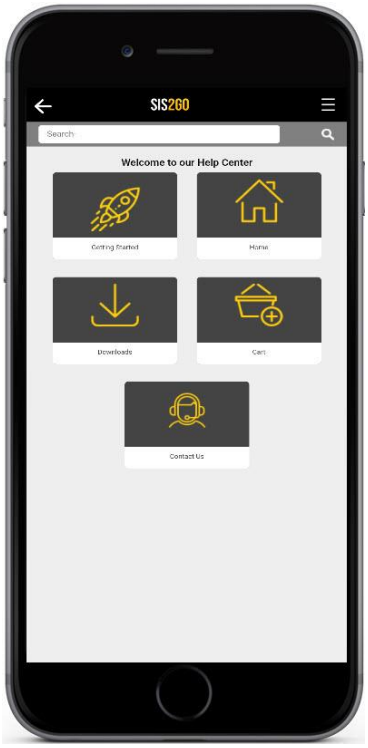
- In the *Main Menu,* select **Help.** The help documentation appears.



Privacy and Legal

The Privacy and Legal contains:

- **Privacy Policy**: A legal document that describes how the personal information collected from a SIS2GO customer is being used, managed and disclosed by Caterpillar.
- **End User License Agreement (EULA)**: A legal contract between Caterpillar and the user of the SIS2GO app.
- **Copyrights Notice**: A notice of statutorily prescribed form that informs users of the underlying claim to copyright ownership in a published work.
- **Open Source Software Notice**: Permission that grants users the rights to use, modify and share software or its components with anyone and for any purpose.

To view privacy and legal, follow the step:

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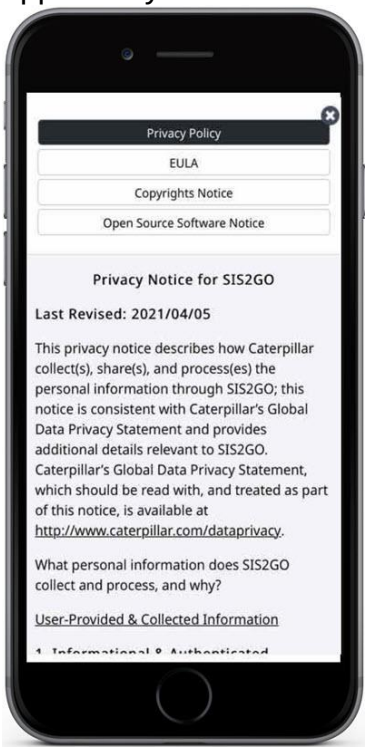
- In the *Main Menu*, Select **Privacy and Legal**. The *Privacy Policy* screen appears by default.



Cookie Notice

Statement declared to the users outlining the types and use of cookies that are active on the application, how the data is tracked and its purpose.

To view cookie notice, follow the step:

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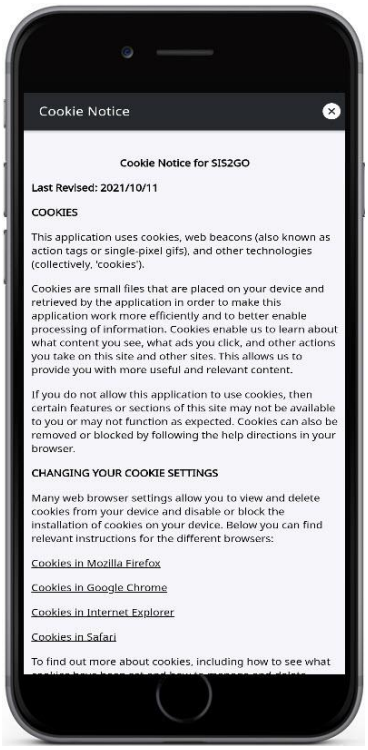
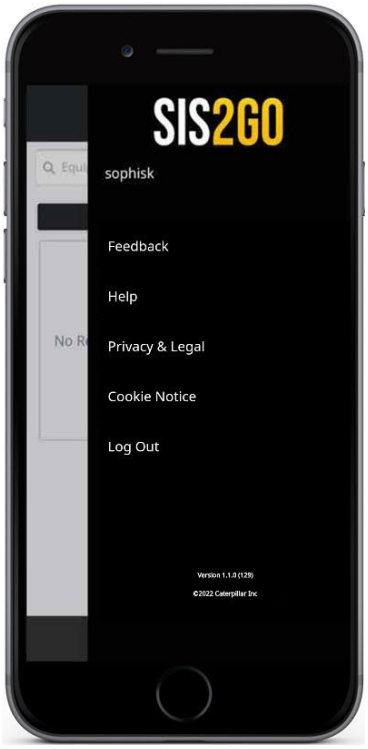
- In the *Main Menu*, select **Cookie Notice**. The *Cookie Notice* screen appears.



Log Out

To log out of SIS2GO application, follow these steps:

1. In the *Main Menu*, select **Log Out**.



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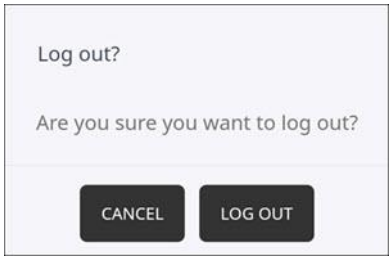
2. The following confirmation pop-up appears. Select **Log Out** to exit the application. The SIS2GO *Sign In* screen appears.
   Note: All active downloads will be paused once the user logs out of the application.



Downloads

In Progress

The In Progress tab allows the user to upload equipment list to download, search for equipment, download equipment, view active downloads and manage active downloads.

To view the list of equipment being downloaded and queued for download, follow these steps:
Note: The steps to download a prefix are the same as Home > Download steps.

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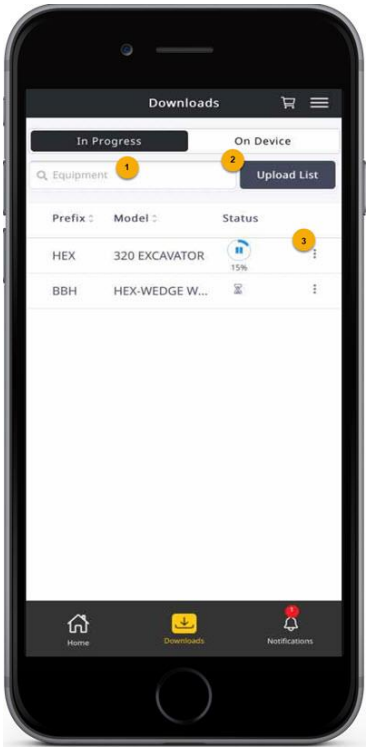
- Select **Downloads**. Select **In Progress** tab on the Downloads screen. The following screen appears.



1. **Search Equipment**: Enter product family, sales model, prefix or serial number to search
2. **Upload List**: Upload equipment list with prefix and sales model as .csv file format to download prefix
3. **More Actions**: To pause, resume or cancel download

The following are the different statuses available for a file:

- **Download** : The prefix is available for download
- **Pause** : Option to pause the download
- **Resume** : Option to resume the download
- **Download In Progress** : Download is in progress
- **Download Completed** : Download has completed successfully
- **Pending Download** : Download is in the queue
- **Failed** : Download has failed

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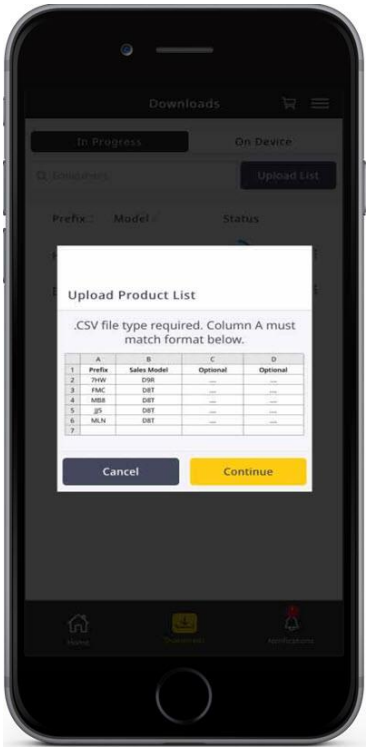
Upload List

Users can upload an equipment list by saving a list of prefixes in a .csv file. The Upload List option is available to help users in downloading bulk equipment lists.

Valid .csv file with prefixes are eligible for upload. During the .csv file upload, already downloaded/failed prefixes will not be selectable for download. Other valid prefixes will be selectable for download. Only selected prefixes will be added to the download queue.

To upload equipment list, follow these steps:

1. Select **Upload List** option in *In Progress* tab.
2. Select **Continue** to upload a valid .csv file with prefixes.



3. The file is uploaded successfully. Select or deselect equipment to be downloaded. Select **Download Products** and the prefixes will be added to

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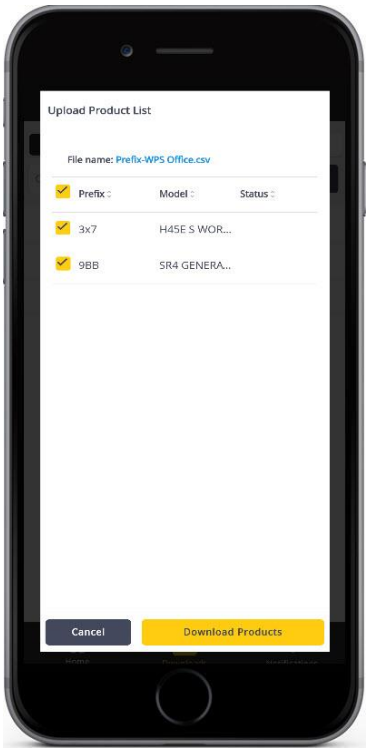
the downloading queue.



On Device

The On Device tab allows the user to view and manage downloaded equipment.

To view and manage the list of equipment downloaded to the device, follow these steps:

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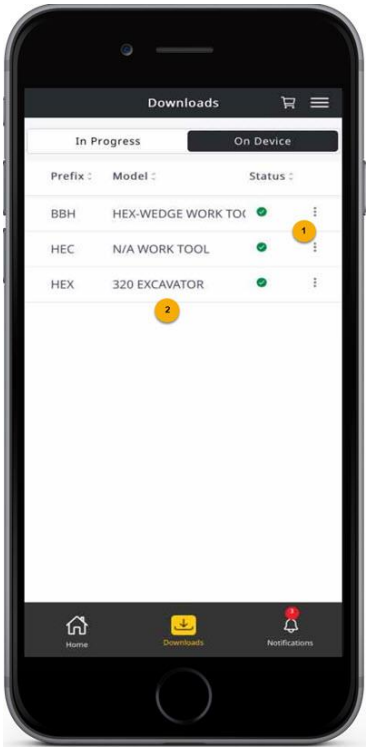
- Select **Downloads**. Select **On Device** tab on the Downloads screen. The following screen appears.



1. **More Actions**: To Check for Updates, Process Updates, View More Details or Delete a Prefix
2. **Downloaded Prefix**: Navigate to the parts and service information

The following are the different statuses available for a file:

- **Download Completed** ✓: Download has completed successfully

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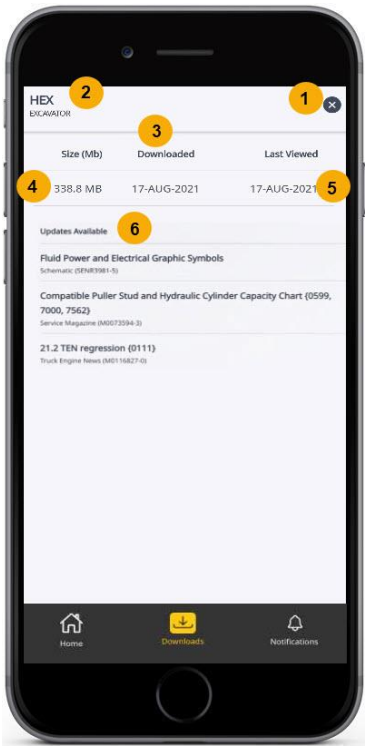
- **Updates Available** : Updates are available for downloaded prefix



1. **Exit**: Closes screen
2. Prefix of the file
3. Date of when the prefix was last downloaded or updated
4. Total size of the file
5. Last Viewed: Date of when the prefix was last viewed
6. List of available updates

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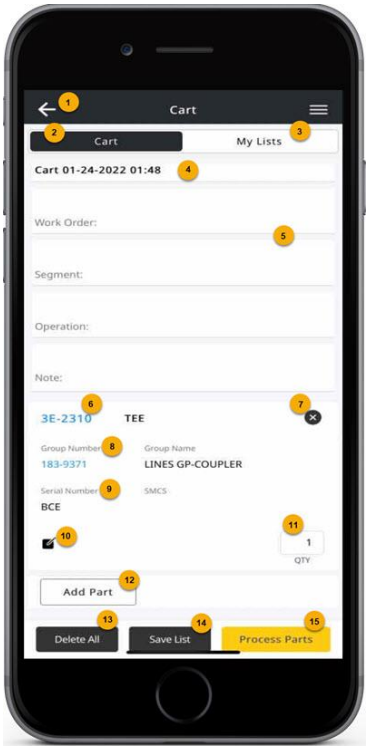
Cart

Cart

Within the Cart screen the user can view, edit, save and process a parts list. Parts are added within the *Cart* or through the *Parts Details* screen by selecting Add to Cart Icon (icon). The parts in the cart can be processed by three options: save parts list to device, email parts list or process parts list in Parts.cat.com (PCC).

To view, edit, save or process parts in the cart, follow these steps:

1. Select **Cart** icon near the *Main Menu* within the header of each screen. The *Cart* screen appears.



1. **Back**: Redirects user to the previous screen.
2. View of the active cart
3. View of saved parts list
4. Default name is Cart with the current date and time (Editable field)
5. Editable fields
6. **Part Number**: Redirects the user to search screen and populates search results for the selected part

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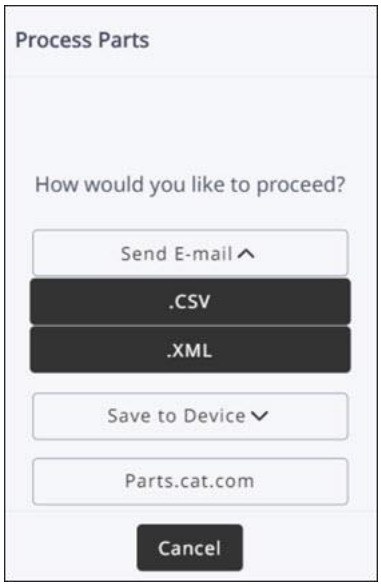
7. **Remove**: Removes individual part from the cart
8. **Group Part Number and Name**: Redirects the user to search screen and populates search results for the selected part
9. Serial Number
10. Add notes for parts (Editable field)
11. Edit quantity
12. Ability to manually add parts to the cart by part number and quantity
13. Removes all parts from the cart
14. Saves the active Cart to My Lists. The name of the Save List will be the entered text in the Order ID field.
15. Process the list of parts in the active cart by email; save a file locally or through Parts.cat.com

2. Select **Process Parts** to process the active cart by saving a local file, send a list via email or to PCC. The *Process Parts* pop-up appears. Select the desired options to send parts details via email or save the list to the device.



1. Select **Send E-Mail** to open the device's default email application and attach a .csv or .xml file to send.
2. Select **Save to Device** to save .csv or .xml file locally on the device.
3. Select **Parts.cat.com** to send the parts list to PCC to order. The user must have a valid PCC account to order parts. The *Select Dealer*

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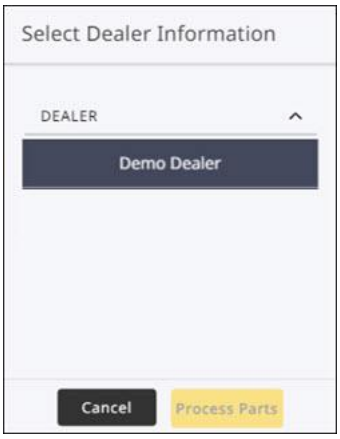
Information pop-up appears.



i. Select a preferred **Dealer** to order the parts.

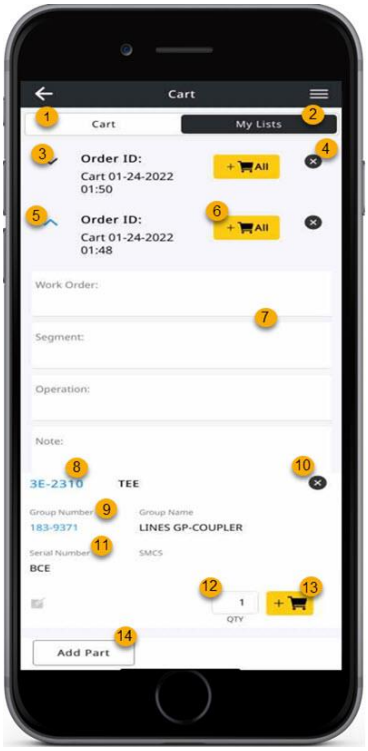
ii. Select **Process Parts** to redirect to the PCC website and complete the ordering of parts.

My Lists

Within My List of the Cart, the user can view and edit the saved parts list.

To view, edit, or add parts from the saved parts list, follow the step:

- Select the **Cart** icon near the *Main Menu* within the header of each screen. Select **My Lists** tab on the *Cart* screen. The following screen appears.



1. View of the active cart
2. View of saved parts list
3. Non editable field
4. **Remove**: Removes the saved parts list from My Lists view
5. **Expand or Collapse**: Expand or Collapse the view of the saved part lists
6. Adds all the parts and quantities from the saved parts list to the cart
7. Non editable field
8. **Part Number**: Redirects the user to search screen and populates search results for the selected part
9. **Group Part Number and Name**: Redirects the user to search screen and populates search results for the selected part
10. Remove: Removes individual parts from the cart
11. Serial Number
12. Edit quantity
13. Adds individual part and quantities to the cart
14. Ability to manually add parts to the cart by part number and quantity

Notifications

Users are now notified in application when a prefix is downloaded, cart list is saved, cart is processed/saved/sent, updates available for downloaded prefix and if a prefix download fails via the Notification tab. The notifications are listed with timestamp.

The count on the Notification tab with Red indicates the number of available notifications. Notifications can be deleted once viewed. A maximum of 50 notifications will be populated in the the Notifications screen. The recent notifications are listed at the top of the list.

The following are the different notifications available in SIS2GO:

- **Cart Saved to My List** : Parts added to cart are saved to My Lists
- **Processed Cart** : Shopping cart is successfully processed/saved/sent

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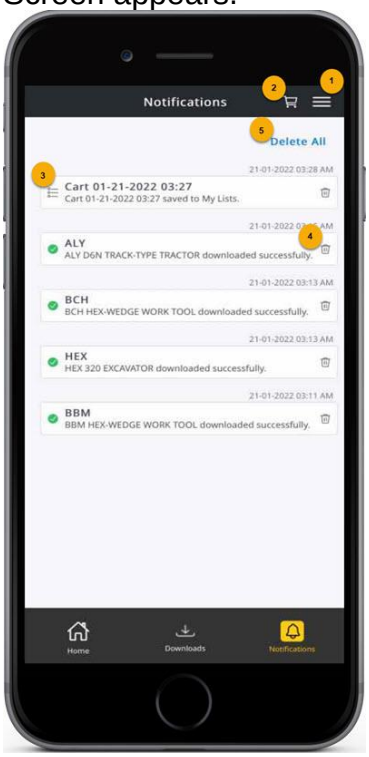
- **Downloaded** : Download has successfully completed for prefix
- **Update Available** : Updates are available for downloaded prefix
- **Download Failed** : Download has failed for prefix

To view notifications, follow these steps:

- Select **Notifications** icon within the footer of each screen. The *Notification* Screen appears.



1. **Main Menu**
2. **Manage Cart**
3. **Notification List**: View the list of available notifications with timestamp
4. **Delete**: Delete the selected notification
5. **Delete All**: Delete all the available notifications

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Contact Us

	SIS2GO@cat.com

Glossary

C

CWS ID: Corporate Web Security (CWS) ID is the user id that Cat employees or dealers use to log in to their email or other Caterpillar enterprise applications.

E

Equipment: The physical piece of machinery in the field identified by unique serial number. Example of equipment includes Bulldozers, Trucks, etc. An object that provides measurable and transmittable data to software platform.

N

Notification: Notification about a specific action that takes place on the application in the form of in-app notification.

O

Order ID: Unique identification number of the part's order

S

Sales Model: Unique model number provided for the asset.

Serial Number: The manufacturer-assigned serial number for the asset

SMCS: Service Management Control System (SMCS). A four-digit code that describes the components of Caterpillar equipment.

U

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UCID: Universal Customer Identification Number (UCID) is a Caterpillar-specific business identification number created by the UCID application on Cat Dealer Storefront.

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