CAT® INSPECT RELEASE NOTES

## February 2022

Cat Inspect

Cat Inspect is an easy-to-use application that allows users to download and complete Caterpillar and user-defined inspections with the option to include additional information like images, videos, comments, and ratings. Completed inspection details are easily retrieved from the streamlined web portal for follow up and opportunity management.

NEW FEATURES & ENHANCEMENTS

Cat Inspect Mobile Release 4.3.15 (February 17, 2022)

1. **New SOS Inspection features**

When submitting a SOS sample through Cat Inspect, users can now use the Fluid History feature to autofill the Fluid Brand, Fluid Weight and Fluid Type based on the Serial Number and Compartment combination entered. This feature is only available while your device is in a connected state. Fluid Type is now a new separate field that in previous versions was combined with Fluid Brand. In addition, the SOS sample workflow has been streamlined for adding additional compartments and submitting the sample.
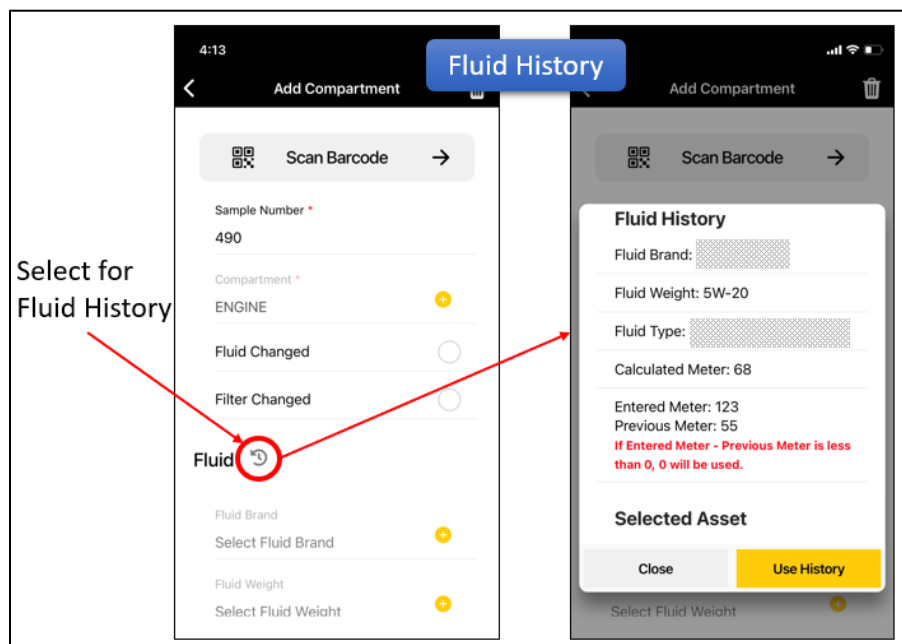
Fluid Type

Fluid Type can be auto-selected based on Fluid History

Fluid Type

Fluid Type can be also searched based on Fluid Brand and Weight Combination

Workflow Changes

Select "Save Compartment Information" to navigate back to the SOS overview page

In overview page, select "Add compartment" or "Submit" once all compartments are added
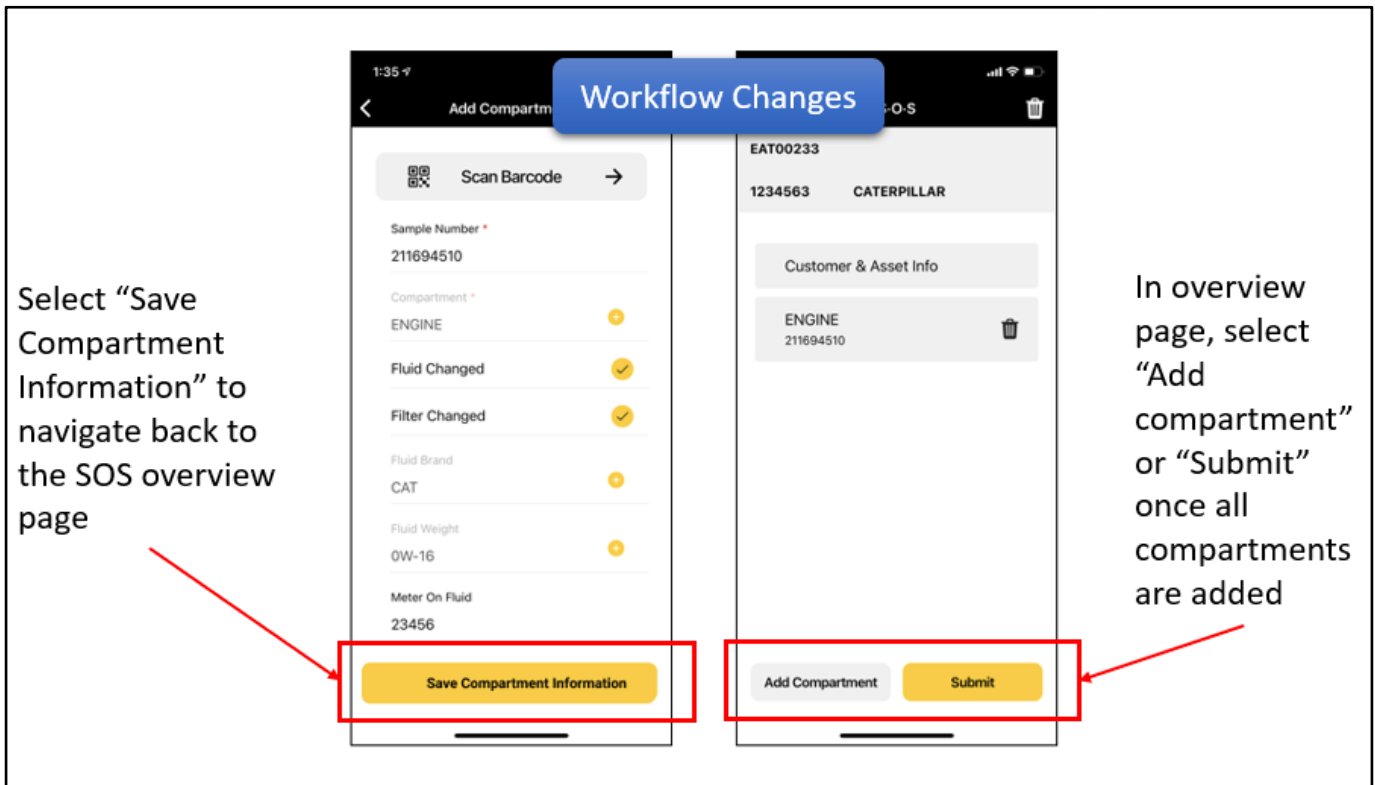
2. **Dealer Website Assessment is now a new Site Category and Form Type.** *(See web release notes below)*
3. **Global Service Agreement has been added as a new form type.** *(See web release notes below)*

NEW FEATURES & ENHANCEMENTS

Cat Inspect Web (February 15, 2022)

1. **Organization Administrators can now deactivate users.**

Admins are now able to deactivate a user from Cat Inspect by navigating to the "User Profile" page under the "Users" menu. Click the dropdown arrow next to account status and select "Deactivate". Once a user has been deactivated, they are no longer able to use the mobile app or website.

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User Profile

Name
TestGroup

Email
test@gmail.com

Organization
Caterpillar

CatRecID
Test

Account Status
Deactivated

☐ Display in Assignee List

Account Type

○ Administrator
Ability to manage access levels for Cat Inspect Web users, re-open cancelled inspections, re-assign in-progress inspections, force complete an in process inspection, create notification groups & assign to forms. Administrator can also perform all author and inspector level activities within Cat Inspect Web and mobile app.

○ Author
Ability to create and manage forms, assign inspections, re-assign in-progress inspections, view completed inspections, use advanced search as well as create QR Codes, create notification groups & assign to forms. Author can also perform all inspector level activities in the mobile app as well as complete online inspections.

● Inspector
Ability to assign inspections, re-assign in-progress inspections, view completed inspections, edit completed inspections, use advanced search as well as create QR Codes. Inspector can also use all features in the mobile app as well as complete online inspections.

Cancel   OK

2. Changed the user archiving process.

Admins can choose to include or exclude a user from the Inspection Assignee list by clicking the box labeled "Display in Assignee List" under the "User Profile" page. This process was previously called "Archiving" and is now more explicit with an updated description. A user with an account type of "Active" can be listed as an assignee or removed as an assignee. Deactivated users will be removed from the Assignee list by default.

User Profile

Name
Cat Test Dealer

Organization
TD99

Account Status
Active

☑ Display in Assignee List

3. Dealer Website Assessment is now a new Site Category and Form Type.

The Retail Transformation team has created a new Dealer Website Assessment form in Cat Inspect that allows dealers to rate their customer facing webpages. To access this form, start a new Site inspection and select the Dealer Website Assessment Category and then click the Dealer Website Assessment form. This form can also be found under an Equipment inspection by first selecting the Product Family, Family-All and then clicking on the Dealer Website Assessment form.

Caterpillar: Confidential Green

4. Global Service Agreement has been added as a new form type.

This is a new form type added primarily for the CAT Marine's Delivery Service Center to create forms for the purpose of identifying contractually required inspections for Marine's Global Value Agreement customers. These forms will be created and released by engine arrangement in English with translations to Spanish, Portuguese, French, Simplified Chinese, and Russian to follow. Please contact Mike Creecy for additional questions.

FIXES

1. **Mobile 4.3.13:** Fixed an issue with images disappearing.
2. **Mobile 4.3.14:** Fixed an issue that caused some user authentication problems.
3. **Mobile 4.3.15:** Various minor updates and bug fixes.
4. **Web:** Various minor update and bug fixes.

COMING SOON

Here is a preview of some new features to expect in our upcoming release schedule:

- A new Cat Inspect API (Application Program Interface) will be made available on the Digital Marketplace

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- Form authors can designate specific questions as mandatory.
- Form authors can add custom header fields to an inspection form