

# CAT® INSPECT RELEASE NOTES

Dec 14, 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.

## SUMMARY

### What's included in this update?

#### **Cat Inspect Mobile** (Released December 6, 2022)

1. Enhanced user experience around syncing and reconciliation between web/mobile
2. Integration with the new web based Custom Header form building enhancement
3. Users can now manually change the language of the mobile app
4. Users can now manually change the language of generated inspection report prior to submission
5. 'Asset ID' field added to the Inspections summary view

#### **Cat Inspect Web** (Released November 29, 2022)

1. Form Authors can now add custom header fields to new and existing inspection forms
2. 'Create Form' process now starts with selecting either Equipment or Site inspection type
3. 'Create Form' preview page now displays header fields by header type (Equipment, Customer, System)
4. Inspection forms with custom header fields added to the Assignment workflow
5. 'Create Form' workflow now includes a 'Header Field' breadcrumb when creating or modifying a form
6. DOWNLOAD DATA output to utilize local date format of user
7. Users can now change the language of generated inspection report when performing web inspection

**CORRECTION:** See updated description below on previously communicated Cat Inspect and SOS sample submission enhancements.

## MOBILE - NEW FEATURES & ENHANCEMENTS

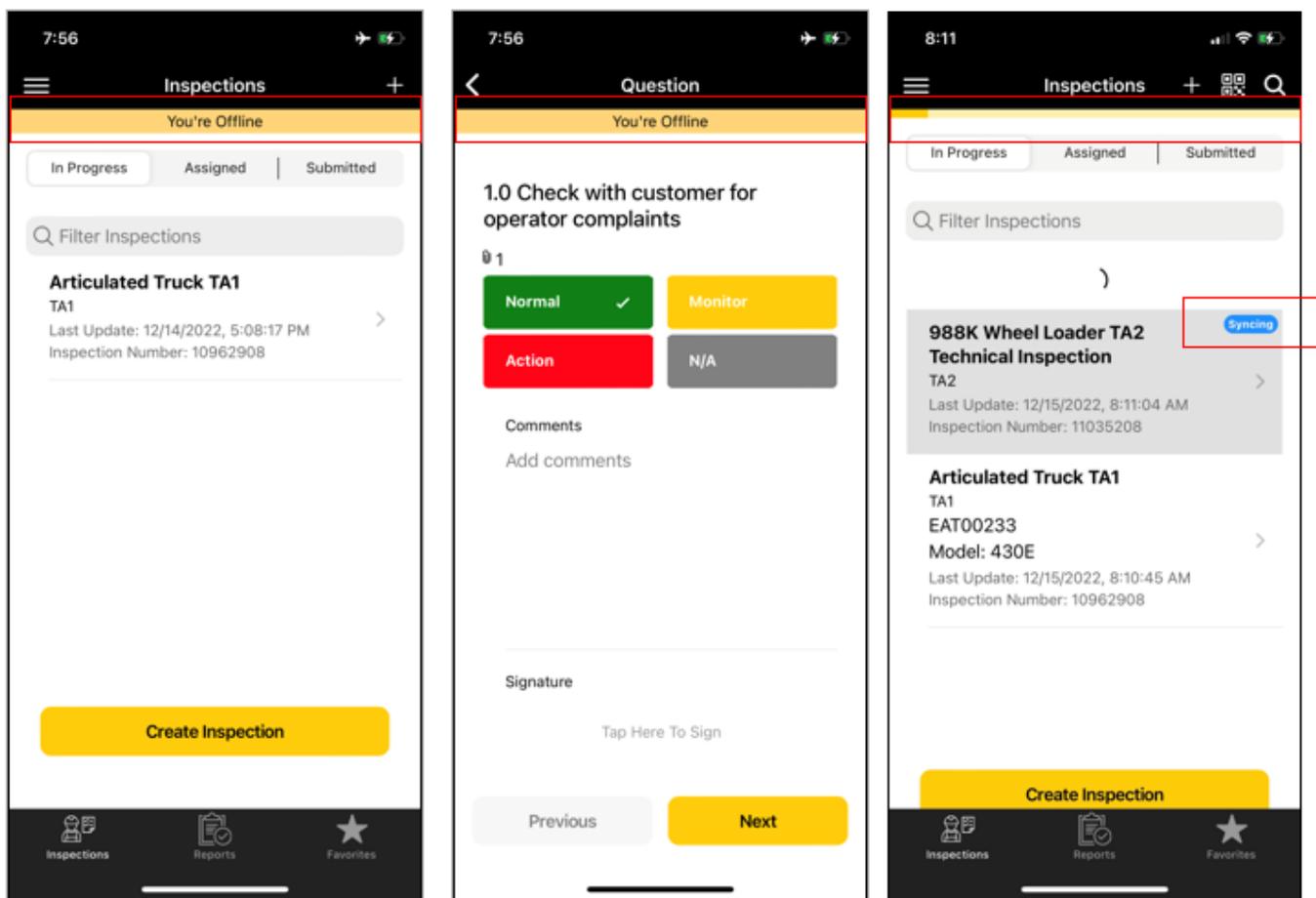
### Cat Inspect Mobile

1. Enhanced user experience around syncing and reconciliation between web/mobile.

If the mobile is in disconnected state, the user will see "You're Offline" sticky banner just below the app header. This banner will not be visible when the mobile is in connected state.

When the user pulls to refresh the inspections manually or when the application auto syncs every 90 secs, the user will see a progress bar just below the application header. It will remain visible while the sync is in progress and will be hidden once the sync is complete. In this release, we have brought only Customer & Asset Info (headers) into this sync process. Questions & attachments will be added to the sync updates in later releases.

For any inspection that requires Customer & Asset Info (headers) sync, the user will see a Syncing pill on the inspection card. The Inspection card will be disabled, and user will not be able to tap and open inspection until the inspection is synced.

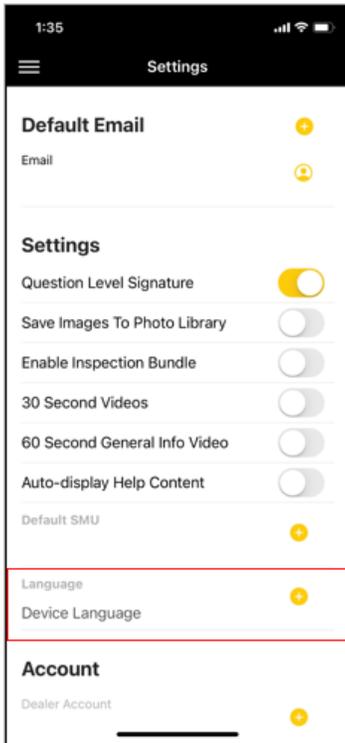


## 2. Integration with the new web based Custom Header form building enhancement allows mobile users to view and input data for custom header labels when performing an inspection.

The mobile app has been updated to account for the new Cat Inspect web feature that allows Form Authors to add custom header fields to an inspection form. If the custom header fields are required, they will be shown with a red asterisk like Serial Number and Service Meter Value.

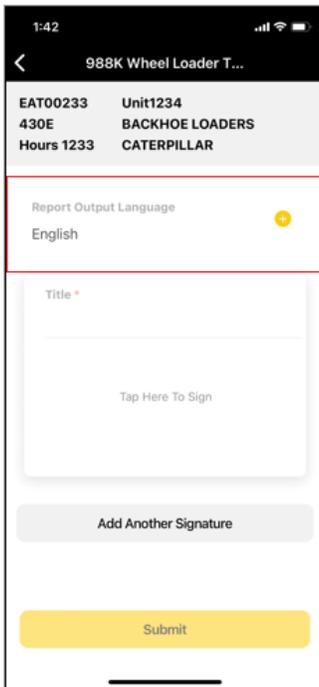
## 3. Users can now manually change the language of the mobile app.

If the desired language within Cat Inspect differs from the language setting of the device, users can now manually change the language within the app. This feature can be found using the main menu in the top left corner of the screen under "Settings".

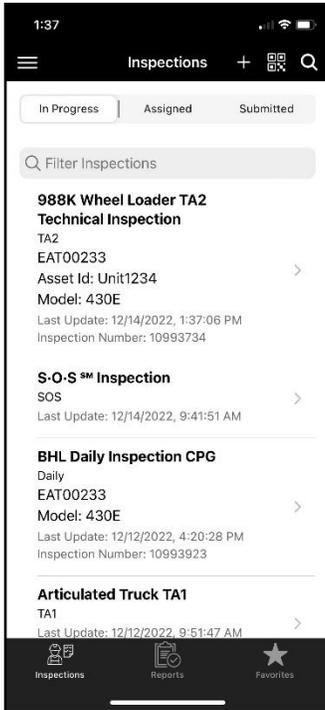


#### 4. Users can now manually change the language of generated inspection report prior to submission

When performing an inspection in the mobile app, the inspector can now select the desired language in which the inspection .pdf report is generated if the desired output is different than the device settings or the language selected under the “Settings” page. The Report Output Language can be found on the final inspection submission screen.



## 5. 'Asset ID' field added to the Inspections summary view.

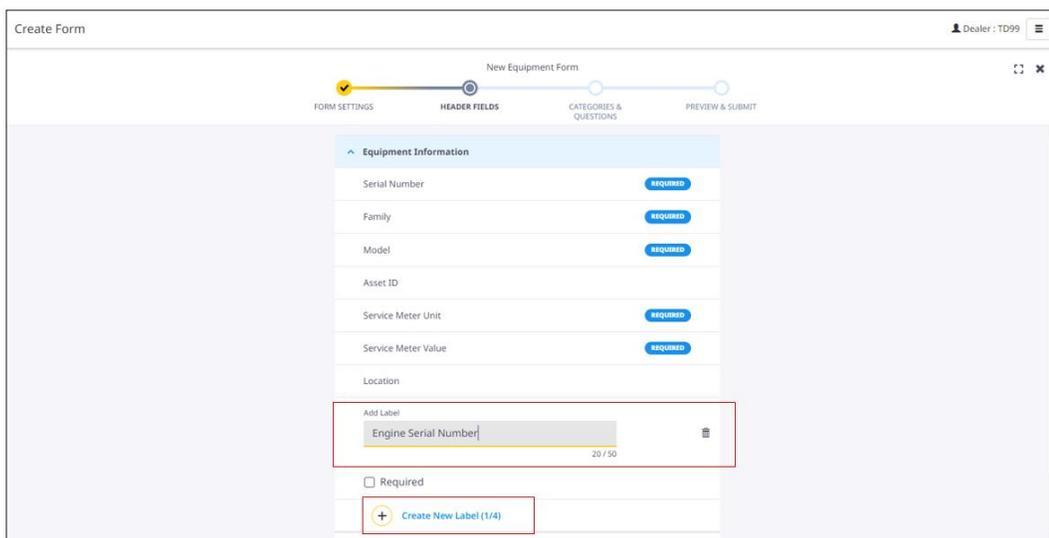


# WEB - NEW FEATURES & ENHANCEMENTS

## Cat Inspect Web

### 1. Form Authors can now add custom header fields to new and existing inspection forms.

Form Authors can now add customization to the Inspection header fields when creating or modifying a form. This allows for greater flexibility in how a form is structured and ensures that all relevant inspection data is captured up front and displayed at the top of the inspection .pdf report. For example, if you want your inspectors to always document the Engine Serial Number when performing a machine inspection, you can add “Engine Serial Number” as a custom header field. Form Authors can add up to 4 custom header fields to the Equipment Information section and up to 4 custom header fields of the Customer Information section of an inspection.



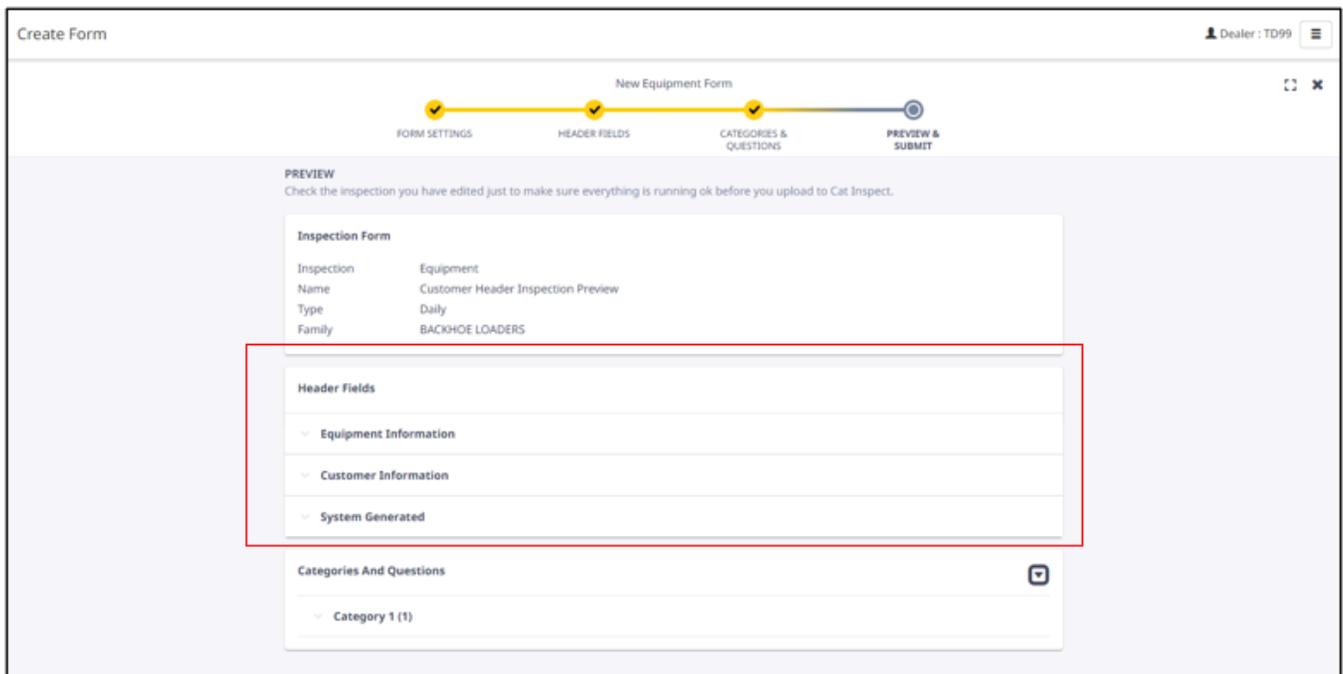
**2. 'Create Form' process now starts with selecting either Equipment or Site inspection type.**

When creating a form, the Author is now required to choose either Equipment or Site as the primary inspection type. This triggers the proper workflow for the remaining steps in the form building process that now includes custom header fields.



**3. 'Create Form' preview page now displays the header fields by header type (Equipment, Customer, System).**

The final step in the form building process, PREVIEW AND SUBMIT, has been updated to include the 'HEADER FIELD' section. This gives the form author visibly to all header fields displayed to the user within the inspection plus the system generated fields that are added to the inspection .pdf report. This preview also includes custom header fields added by the form author.



#### 4. Inspection forms with custom header fields added to the Assignment workflow.

Now that custom header fields can be added to inspection forms, the website has been updated to allow those forms to be selected and assigned to Cat Inspect users.

#### 5. 'Create Form' workflow now includes a 'Header Fields' breadcrumb when creating or modifying a form.

Create Form Dealer: TD99

New Equipment Form

FORM SETTINGS **HEADER FIELDS** CATEGORIES & QUESTIONS PREVIEW & SUBMIT

Equipment Information

Serial Number REQUIRED

Family REQUIRED

Model REQUIRED

Asset ID

Service Meter Unit REQUIRED

Service Meter Value REQUIRED

Location

+ Create New Label (0/4)

Customer Information

System Generated

#### 6. DOWNLOAD DATA output to utilize local date format of user

When a file is exported from the DOWNLOAD DATA menu of Cat Inspect web, the output report will show the local date format of the user.

#### 7. Users can now change the language of generated inspection report when performing web inspection

When performing an inspection on Cat Inspect web, the inspector can now select the desired language in which the inspection .pdf report is generated if the desired output is different than the browser language setting.

Perform Inspection Dealer: TD99

CUSTOMER/ASSET DETAILS QUESTIONS **LANGUAGE** SUBMIT

Preview

Sign your inspection and upload it.

Title

Signature

Signature Upload

Signature Canvas

Canvas

Language

Select the Inspection report language

English (United States)

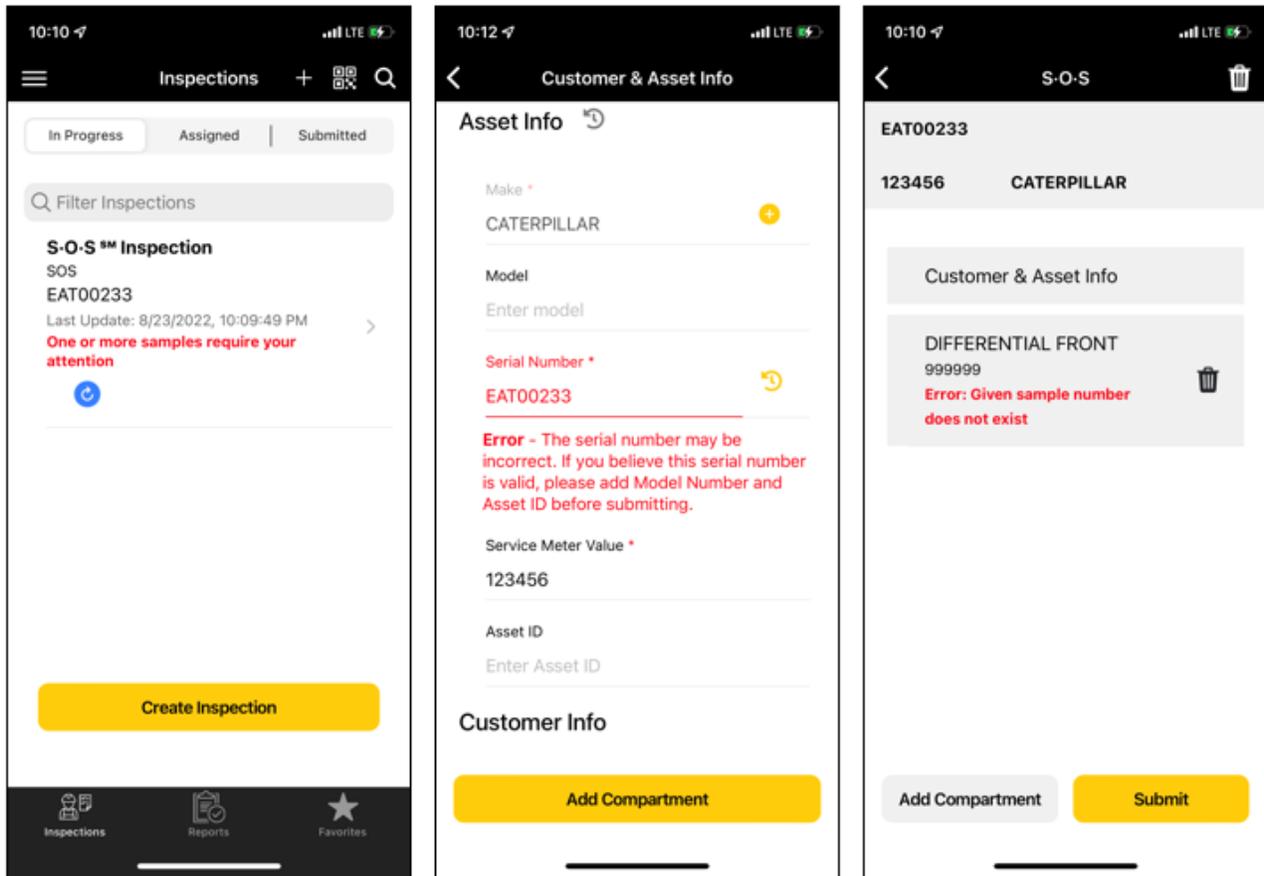
# CORRECTION: CAT INSPECT RELEASE NOTES: AUGUST 29, 2023

*The SOS sample submission workflow has been updated to account for unregistered Serial Numbers and Invalid Sample Numbers, however, users cannot submit a sample with an invalid serial number like previously stated. This change is planned for future iterations of Cat Inspect mobile and will be announced later. The August release introduced a new feature to highlight errors before the sample was submitted rather than after they were submitted.*

Sample Number and Serial number validation has been added to the SOS sample submission workflow to help reduce sample submission errors. When the device is in a connected state, the app will validate Serial Numbers and Sample Number prior to the sample being submitted.

If a Serial Number is not registered to the selected dealer, the user will receive an error message prompting them to verify the serial number is correct and to add Model Number and Asset ID before submitting. ~~This will allow the sample to be submitted from the app and the Serial Number can then be registered by an SOS Administrator.~~

Error messaging has also been added when the given sample number does not exist. When this occurs the user will be prompted to contact their Dealer SOS Administrator who will need to contact Caterpillar's SOS support to resolve the issue.



## FIXES

1. **Mobile:** Fix to 'content failed to sync' error
2. **Mobile:** Fix to when images are added from gallery

## 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
- Organizational managed questions responses (options sets).
- Auto-fill Inspection customer and asset information
- New mobile app inspection form search feature.