

# VISIONLINK® RELEASE NOTES October 2023

# VISIONLINK®

VisionLink provides an easier experience for customers to manage threeir assets – connected and non-connected, Cat® and equipment from other manufacturers – and enables

- increased uptime
- reduced unplanned downtime
- maximized utilization

# **ENHANCEMENTS**

### Needs Review - Ability to Search

- Allows the user to search for an asset by the following:
  - Asset Serial Number
  - Asset ID
  - o Make
  - o Model

<b>∏</b> Filters	Q Search assets	0	CAT PRODUCT LI	KL
		<b>晋 10/18</b>	/2023 - 10/24/2023	<b>v</b> (i)
			Q Find asset	

### Needs Review – Grouping and Filtering Toggle

- Group by Asset allows you to see all instances that apply to the asset from newest to oldest when the asset row
  is expanded
- Allows you to filter on specific event category instances to help you quickly and easily get to the information you need
  - o These filters apply whether Group by Asset is toggled on or off

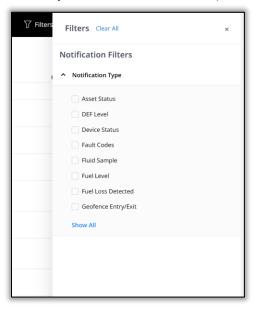
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Health Issues     3 New       Assets     -1 HIGH     -2 MEDIUM       Map     Maintenance     -3 Mem       Tasks     -0 COMPLETED     -7 OVERDUE       -0 COMPLETED     -7 OVERDUE       -3 UPCOMING     -7 OVERDUE       Health     -7 OVERDUE       Utilization     Device Status       -4 NOT REPORTING     -4 NOT REPORTING	H	Home	C Last Updated: 10/1	7/2023; 13:46 CDT	0	~ 1	lctive	Resolved Dismissed
Map     Maintenance     10 New       Tasks     0 COMPLETED     7 OVERDUE       Maintenance     0 COMPLETED     7 OVERDUE       Maintenance     0 COMPLETED     7 OVERDUE       Health     Device Status     4 New       Utilization     Device Status     4 New       Asset Operation     4 Not REPORTING	1	Needs Review	Health Issues		3 New	Gro	oup by As	set C Filter by: Status (2)
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Asset Operation 745 1 New 745-04 - CAT - 3T601556	8	Utilization			4 New	×		
Manage ~	4	Asset Operation	4 NOT REPORTING			~	-34	
	Ô.	Manage ~						

### Needs Review - Notifications Filter Update

• On the Notifications page > Show Only Mine tab, the "Owner" filter option has been removed.

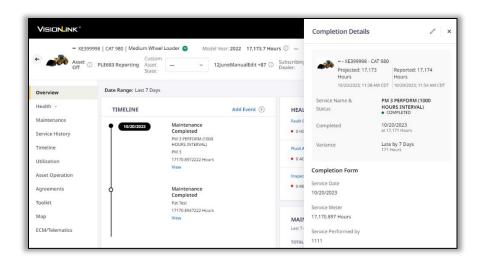


### Assets – Asset Details > Timeline: For Maintenance Completed Entries, Open Completion Details

 When you are in Timeline view, the View link will open the Completion Details drawer instead of being redirected to Asset Details > Maintenance

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### Fluid Analysis – Recommendation Column Renamed Interpretation

- For fluid sample instances in Needs Review > Health Events
- For fluid sample results in Health > Fluid Analysis and Fluid Analysis Asset Details

### Utilization Chart on Home Page

- A Utilization chart is now available on the Home page
- It shows the **Total Runtime, Idle Time, and Working Time** data for the last seven days. To see more details, select the data in the chart



### Set Home Page Preferences

- Use the arrow button on the category widgets to move up/down to personalize your Home page
- Changes will save immediately
- Ability to configure Home page based on user needs

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My Tasks (Next 7 days	) ↑ ↓			
	You have	no tasks due or coming due	in the next 7 days.	
Maintenance ↑ ↓	×			
Overdue	Due this week Oct 9 to 15, 2023	• Due next week Oct 16 to 22, 2023	Due next 30 days     Oct 12 to Nov 11, 2023	• Due next 60 days Oct 12 to Dec 11, 2023
12 services	0 services	1 services	5 services	11 services
Utilization (Last 7 da	ys) 🛧 🗸	<b>36.6</b> Hours (19%)		<b>153.4</b> Hours
		Table There a		
Total Run Time •		Idle Time 🗕	v	Vorking Time •
60		Idie Time •	v	Vorking Time •

### User Management – Account Selection for User Invites

• When there are multiple usernames associated with the same email address, the admin will be prompted to select the username they would like to send the invite to

← Multiple Accounts Identified ①	×
The following email addresses are associated to multiple accounts. Select the account to invite.	
1. john.doe@acmecontruction.com	
🔿 jdoe18	
🔘 john.doe	
◯ johntest2023	
Cancel	2

### Planned Maintenance – Select Days as a Tracking Parameter

• Available under Independent Interval and Major Component

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- When you need to edit an asset under Planned Maintenance, you can use Days as a tracking parameter and input a date for First Occurrence
  - Planned Maintenance > Select Asset > Edit Settings > Edit > Click Independent Interval or Major Component > Add Service > Enter First Occurrence and Select Days as Parameter
- Allows user to enter an accurate date a service first occurs

* Title							J
						0/150	2
Description (Opti	onal)						
						0 / 50	5
<ul> <li>First Occurrence</li> <li>10/31/2023</li> </ul>	^			neter			
- 10/5//2025		11	Day	2		-	4
Occurs only one	e						
Occurs only onc	e (	_	осто	BER, 2	023 -	_	
- 1	_	MON	OCTO TUE	BER, 2 WED	1023 - тни	FRI	
- 1	×	MON 2				FRI 6	3
- 1	4 SUN		TUE	WED	THU		3
- 1	۲ SUN 1	2	TUE 3	WED	THU 5	6	
- 1	4 SUN 1 8	2 9	тие 3 10	4 11	тни 5 12	6 13	3

### Utilization – Multi-Select Assets

- On the Table View, a checkbox displays for each asset next to the Asset column
- When more than one asset is selected, the bulk menu opens for the user to choose:
  - o Target Settings
  - o Estimates
  - Add to Group
  - o Show on Map
- Allows users to select multiple assets to see specific data, easily add assets to a specific group, and view where
  each asset is located (save money and time shipping assets that are closer to jobsites)

3) Se	elected :	Target Settings Estimat	es Ad	ld to Group Show on	Мар	×		
-	Assets	Ý		Last Known Hour Meter	v	Latest Utilization Report	~	Runtime ↓ (Hours)
-		- (1)	:	696		10/19/2023;		40.0
	<b>A</b> 00	901 - CAT - YHD00152		10/19/2023; 03:39 CDT		17:39 JST		40.0
	55	34 444F2 DEMO	:	3,450		10/19/2023;		▼ 34.6
	-	444F2 - CAT - HWS00694	•	10/19/2023; 09:18 CDT		16:18 CEST		• 54.0
	-84	US00351	:	829		10/18/2023;		<b>7</b> 29.7
	<b>A</b> 000	938M - CAT - J3R07643	•	10/18/2023; 13:14 CDT		19:07 CDT		23.7
	1001	XQ60 !		3,162		10/19/2023;		<b>v</b> 28.1
	- allower	XQ60 - CAT - CF900367	•	10/19/2023; 09:26 CDT		09:26 CDT		¥ 20.1
		34-444F2-DEMO		6,679		10/19/2023;		- 24.6
^		444F2 - CAT - HWS00451	:	10/19/2023; 08:33 CDT		15:33 CEST		₹ 24.6

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### Utilization - KPI - Total CO<sub>2</sub> Emissions

- A new Total CO<sub>2</sub> Emissions KPI has been added to Utilization and Utilization Asset Details
  - In Utilization, the displayed value is the sum of CO<sub>2</sub> emissions for assets that meet applied filters (if any) for the selected date range
  - In Utilization Asset Details, the displayed value is the sum of each day's CO<sub>2</sub> emissions for the selected date range
- Quick way for users to know the total CO<sub>2</sub> Emissions for the selected assets in a given date range and applied filters

Table 🗸	🛗 Last 7 Days (10/12	/2023 - 10/18/2023) 🗸	Q Find assets		
	<b>5.2</b> Hours	38 Hours Total Idle Time	<b>17</b> % Percent Idle Time	234 gal Total Fuel Burned	5,012.5 lb Total CO <sub>2</sub> Emissions

### User Management – Access Sorting under the Invitation and Access Requests Tab

- On the Invitations tab, the Access column is sortable from "A to Z" or "Z-A"
  - Sort options are translated based on selected language preference
- Quickly and easily allow users to sort the data they need

Users	Invitations Acc	ess Req	uests		
Q Find	User				
Name 🗸			Username 🗸	Status 🗸	Access ∨ L
bigbend	dnate+20211207-2@	:	-	• PENDING	Sort A to Z
cat.fm.s	tyve+2969594792-24	:	-	• PENDING	Sort Z to A

### Reports - Filter Columns in Reports Based on Preferred Language

- Filter column information on the Manage > Reports page is shown in users' preferred language
- Quickly and easily allow users to sort columns in their preferred language

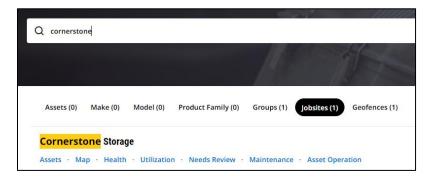
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establece	Resta		lista a las columnas es	Filtrar visible
ático 🛈	Estático	✓ Visible 🛈	bre de la columna	Nom
$\supset$		~		
	$\bigcirc$	<u>~</u>	Tipo de informe	
	$\bigcirc$	<u>~</u>	Propietario	
	$\bigcirc$	<mark>∽</mark>	Frecuencia	
	$\bigcirc$	<mark>∽</mark>	Formato	
	$\bigcirc$	<mark>∽</mark>	Destinatarios	
	$\bigcirc$	<mark>∽</mark>	Filtros	
	$\bigcirc$	<mark>∽</mark>	Tema	
	$\bigcirc$	<u>~</u>	Contenido	
		✓ ✓		

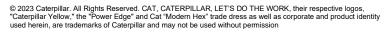
Geofence & Jobsite Global Search Functionality

• Allow users to search for specific geofences & jobsites



### Archived Geofence Excluded from Global Search Functionality

- If the geofence is archived, the search results will not include the archived geofences
- Allow users to only search for active geofences





### 3<sup>rd</sup> Party API Integration – Tadano API Change

• Endpoint URL has changed

### VisionLink Mobile App Features

- Existing CWS account Request VL Access bug (Fixed in V 1.2.6 Oct 09)
- Planned: (V 1.2.7 Oct 31)
- Mobile Browser VL.cat.com Splash page language support
- Bug fixes
- Support customers who also use their mobile devices to access VisionLink

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# **FIXES**

We've addressed the following bug fixes to enhance the overall user experience:

- Issue in the Manage > Shares page, where certain users are unable to share an asset, the shared asset is
  missing the asset ID, and shared asset data is not visible
- Multiple issues in Utilization that certain users are experiencing such as unable to save changes, unable to download a report, Idle Hours and Fuel data is not updating, some data discrepancy, and missing data in Utilization Asset Details
- Issues for certain users in Manage > Notifications, when a user is unable to create a Maintenance Due
  notification with 100+ assets. Additionally, email / text notifications are not received or are coming late
- For some users, the Asset Operation segments and location data are missing
- Certain Dealer users are seeing duplicated assets and are unable to access asset details when searching for an asset, and are missing subscribed and non-connected assets

\*Other various issues have also been addressed.

\*Both the enhancements and fixes section are completed with content that has been implemented between 10.1.23-10.31.23.

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