

2. WEB – THE PORTAL

NOTE: Preferred web browser for optimal performance is **Google Chrome** <https://catinspectweb.cat.com>

Understanding the Dashboard Portal

Used for:

- Report Management – managing inspections
- Online Inspections
- Form assignment
- Form Creation and Management
- Raw inspection data – 30 and 90 day view
- Manage custom forms
- Editing Inspection Details for completed Inspections
- User Management and Force Completion of Inspections (*Administrator level only*)
- Generating QR Codes

The following navigation panel in Cat Inspect App may not be available to all users, as it is dependent on the user profile type assigned.

The screenshot shows the CAT INSPECT web portal interface. On the left is a dark navigation sidebar with the following menu items: INSPECTIONS, PERFORM INSPECTION, ASSIGN INSPECTION, CREATE FORM, DOWNLOAD DATA, MANAGE FORMS, USERS, and QR CODE. The main content area is titled 'Inspections' and features a table with the following columns: Status, S/N, Asset ID, Type, Form Name, Complete Date, Summary, and Attachments. The table contains 10 rows of inspection data. At the bottom right of the table, it indicates 'Items per page: 10' and '1 - 10 of 1597'.

Status	S/N	Asset ID	Type	Form Name	Complete Date	Summary	Attachments
	MRP00587		PM Checklist	GENERATOR - Load Test Checklist/Datasheet	10/01/2019	2 0 23 6	7
	1FF470XCXGGE4713 98	SA6-407	TA1	Hydraulic Excavator (HEX) TA1	10/01/2019	15 2 42 12	13
	SLK01174		Dealer Process	Outgoing Inspection v5	10/01/2019	0 1 6 0	9
	GG800138		Dealer Process	Outgoing Inspection v5	10/01/2019	0 0 7 0	13
	CR503129		Dealer Process	Outgoing Inspection v5	10/01/2019	1 0 6 0	22
	R9J01173		Dealer Process	Outgoing Inspection v5	10/01/2019	0 0 7 0	7
	FJX10241	1053	PM Checklist	CSA FJX PM3 (1000 HOUR)	10/01/2019	4 0 26 0	6
	DX204682		Dealer Process	Outgoing Inspection v5	10/01/2019	0 0 7 0	20
	KSB01928		Dealer Process	Outgoing Inspection v5	10/01/2019	0 0 7 0	10
	MRP00595		PM Checklist	Rental Incoming Inspection - Generator_v2	10/01/2019	2 0 17 6	2

Inspections Page

The following is the default window that displays for all users upon logging in:

The screenshot shows the CAT INSPECT web application interface. The top navigation bar includes the CAT logo and a search icon. Below the navigation bar, there is a sidebar with various menu items: INSPECTIONS, PERFORM INSPECTION, ASSIGN INSPECTION, CREATE FORM, DOWNLOAD DATA, MANAGE FORMS, USERS, and QR CODE. The main content area displays a table of inspections with columns for Status, S/N, Asset ID, Type, Form Name, Complete Date, Summary, and Attachments. The table is filtered for the date range 09/17/2019 - 10/01/2019 and shows 10 items per page. The summary column contains a grid of colored boxes representing different inspection statuses.

Status	S/N	Asset ID	Type	Form Name	Complete Date	Summary	Attachments
	MRP00587		PM Checklist	GENERATOR - Load Test Checklist/Datasheet	10/01/2019	2 0 23 6	7
	1FF470GXCGE4713 98	SA6-407	TA1	Hydraulic Excavator (HEX) TA1	10/01/2019	15 2 42 12	13
	SLK01174		Dealer Process	Outgoing Inspection v5	10/01/2019	0 1 6 0	9
	GG800138		Dealer Process	Outgoing Inspection v5	10/01/2019	0 0 7 0	13
	CR503129		Dealer Process	Outgoing Inspection v5	10/01/2019	1 0 6 0	22
	R9J01173		Dealer Process	Outgoing Inspection v5	10/01/2019	0 0 7 0	7
	FJX10241	1053	PM Checklist	CSA FJX PM3 (1000 HOUR)	10/01/2019	4 0 26 0	6
	DX204682		Dealer Process	Outgoing Inspection v5	10/01/2019	0 0 7 0	20
	KSB01928		Dealer Process	Outgoing Inspection v5	10/01/2019	0 0 7 0	10
	MRP00595		PM Checklist	Rental Incoming Inspection - Generator_v2	10/01/2019	2 0 17 6	2

Inspection Statuses

Status



Completed



Assigned



In Process



Cancelled

Filters

Date Range + Advanced Search Options

- Click on the Date Range filter to display additional parameters to search Inspection Reports by

Date Range ▾ 09/17/2019 - 10/01/2019

Date Range	Type	Form Name
Serial Number		
Inspection Number		
Model Number		
Work Order Number		
Asset ID		
Customer Name		
Inspector Name		
Form Name		

- **Date Range** only provides a 2-week view
 - Change this view by clicking on the calendar icon to obtain a view of up to 90-days at one time

09/17/2019 - 10/01/2019

NOTE: Cat Inspect only houses reports back to January 2016. If users are having trouble obtaining an inspection report prior to this date, please contact catinspectsupport@cat.com

- Filter for All, Assigned, Cancelled, In Process and Completed Inspections
 - Type in Free text Filter Box to pull up specific inspections

All Inspections ▾

All Inspections
Assigned
Cancelled
In Process
Completed

Additional Options

Pull in additional column data into the Inspections Dashboard – the selected options are the default view; any options selected defaults back to these with every log in.

The screenshot shows a user profile for Miranda Wensel (mwensel@finning.com) with a menu containing the following options:

- Column Options
- Customer Search
- Language
- Legal Notices
- Release Notes
- Contact Support

Below the menu is a list of filter parameters with checkboxes:

- Inspection Number
- Serial Number
- Asset ID
- Work Order Number
- Product Family
- Model
- Type
- Form Name
- SMR
- Location
- Inspector Name
- Assigned By
- Assign Date
- Complete Date
- Sync Time
- Customer Name
- Summary
- Attachments

At the bottom of the filter list, there are three small boxes containing the numbers 17, 6, and 2.

Whichever column option and filter parameters selected for the view, an Excel report can be exported from that dashboard view.

See [7. WEB_Reporting Job Aid](#) for more details.

User may also see latest updates (bug fixes and enhancements) via the **Release Notes**.

Release Notes

Sep 30 2019	<p>Features</p> <ul style="list-style-type: none"> Added Polish language translations to the website and email notifications. Mobile app translations coming with next release. Added columns to the CSV export files to show the count of images, videos, and attachments (for recently completed inspections). Modified Details/Edit webpage so that users stay on the inspection if they save a change instead of being returned to Home page. Added "UTC" to date fields in CSV export files to clarify the meaning of the time/date stamps. <p>Bug Fixes</p> <ul style="list-style-type: none"> Corrected a popup warning message for the Make field on the Perform Inspection page. Fixed an issue where the Last Modified Date was not populating in the CSV export from the Form Management page.
Sep 9 2019	<p>Features</p> <ul style="list-style-type: none"> Added a new column on the website called "Attachments" that displays a count of the number of images, videos, and files for each newly completed inspection. Introduced the ability for organization admins to deactivate user accounts on the Users page of the website. Added "Inspector" to the list of titles users can select when signing off on an inspection. Added TAI forms for Diesel Rotary Drills, Electric Rotary Drills, Forwarders, and Knuckleboom Loaders. <p>Bug Fixes</p> <ul style="list-style-type: none"> Fixed an issue on the website that was preventing users from editing Site inspections including Contamination Control forms.
Aug 19 2019	<p>Features</p> <ul style="list-style-type: none"> Introduced the ability to attach up to 3 files to the General Comments section for completed inspections. Attaching spreadsheets, Product Status Reports (PDF), and text files are supported. Added the Location text field to the available headers for Site inspection forms. Added "Actionable" to the subject line of email notifications for inspections that have an Actionable Items report. Changed the "Compressed Air" family name to "Compressor". <p>Bug Fixes</p> <ul style="list-style-type: none"> Fixed an issue on the website to allow proper sorting on the Work Order field.

Close