

## 2C. WEB – CREATE FORM

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

### Form Structure

When creating forms, ensure that all forms follow a consistent naming and setup approach. If a paper version exists, follow the same or as close to the same, structure as the paper form.

It is important that there is development around:

- Form Name
- Determine the [FORM TYPE](#)
- Questions (i.e. Tasks)
- Determining the response set (Option sets) to use
- Guidance notes (i.e. help section per task)

#### **NOTES on Forms:**

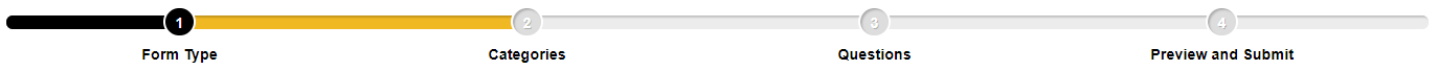
- *Forms cannot be deleted, only archived.*
- *Forms may be modified; if a form name needs to change, the form needs to be cloned in order to be renamed, and previous form archived.*

**Knowing the FAMILY, S/N PREFIX and FORM TYPE will be important to users as these will facilitate their search.**

## Creating a New Inspection Form

Form Name must be minimum of 6 characters and any spaces or special characters are not allowed

Leading or trailing spaces are not allowed



Form Name\*
Search available forms to copy as new form. Requires Type with Family/Serial Prefix to continue.
>

Taken off paper form OR User Identified

Form Type\*  

Form Type is required

Family  

or\*

Serial Number Prefix  

Family or Serial Number Prefix is required

Show Cat Corp. Forms

Selecting Family and/or Serial Number Prefix are the determinants for what returns in the search, in-app and via Web.

- Click to determine if a similar form exists
    - **Created by: Cat Corp** - Cat global forms
    - **Created by:** - Dealer created forms or uploaded form files  
*NOTE: Customer and Dealer databases are segregated, so customers do not have access to Dealer forms or other Customer forms.*
    - **Created by: Customer Name** (customer created forms)
      - Only seen in Customer databases
- NOTE:** Recommended that users search for existing forms to clone from to reduce the amount of work required
- If this is the case, see [Cloning and Editing document](#).

If forms exist, the search will return results from both inputs for Family and/or Serial Number Prefix categories.

- Clicking on the form name will open a preview of that form
- If no forms exist or creating from new, click

## Categories

Add in Categories required for form – typically, these would be any of the headers in the paper form.


Categories have a 100-character limit

Type in category and click  to add in categories

- Click 

## Questions

Questions have a 500-character limit

Click  in a Category to add Questions (i.e. Tasks)

- **Question:** Type in task (no trailing spaces allowed)

- **Option Set:** Clicking into the field opens up the Options Library
  - See [Typical Option Sets](#)
- **Sub-Question:** typically for additional questions requiring measurements; see [Sub-Questions](#)
- **SMCS Code (optional):** for segmenting questions by component type
- **Help:** adding in guidance notes via text, images or PDFs (or combination of)

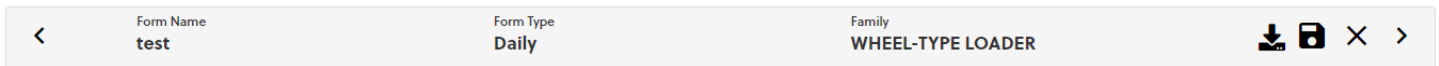
**TIP:** Questions may be ‘drag and drop questions from one category to another.

Click within the question screen to save and continue adding questions until complete.

- Once all Questions have been completed within their respective Categories, click

**Periodically save forms to prevent lost work – Cat Inspect Web does auto-saves and the saved form serves as a draft.**

Click in the navigation bar to save.



- This saves it into the ‘Draft Forms’ section of Cat Inspect Web.
- Users may download the draft if the preferred.
  - Click on Manage Forms
  - Locate Draft form via the name > Click to download into Downloads folder

**CAUTION:** Clearing your browser clears out ALL draft forms saved. To work around this, see Managing Forms document.

## Sub-Questions

To add a sub-question:

**Sub Question (Optional)**

- Type in question in field, click
- Enter Unit of Measurement (open text field)
  - Can enter multiple options – this displays as drop down options in-app

Unit of Measurement for Type Sub-Question \*

To clone sub-questions from one question to another:

- Select the sub-question(s) to clone by clicking on the arrow next to the sub-question
- Select the question to clone them into by clicking on the box next to question
- Click Save

## Categories:

test

test 2

- SQ you have to make a subquestion to test it
- SQ a second one
- SQ you have to make a subquestion to test it
- SQ a second one

question 2

Save

Questions to be cloned

Question to clone to

## Preview and Submit

Expand to review > Click to Publish

Form Name: test

Form Type: Daily

Family: WHEEL-TYPE LOADER

Daily Checks (1)

1. Type your task In

Option Set: Normal Monitor Action N/A

Component Code:

Primary Location:

Secondary Location:

Sub Questions:

1. Type Sub-Question

Fluids (1)

1. Check engine oil

Option Set: Normal Monitor Action N/A

Component Code:

Primary Location:

Secondary Location:

Click OK when window prompt displays:

Form Publisher

Are you sure you want to publish the form? Publishing this form will make it available to all users.

Cancel OK

## Cloning from Existing Inspection Form

All aspects of a form may be changes when cloning a form.

From the list of available forms to copy, select the form to clone. Selected form will display bottom of search.

Form Name\*

Form Type\*

Family

Serial Number Prefix

Search available forms to copy as new form. Requires Type with Family/Serial Prefix to continue.

Show Cat Corp. Forms

Form Type : Daily Family : WHEEL-TYPE LOADER

<input type="radio"/>	CAT OFFICIAL - SWL Product Problem Reporting	Created By: Cat Corp.
<input type="radio"/>	Clayton HOP V001	Created By: Cat Corp.
<input type="radio"/>	Clayton HOP v01	Created By: Cat Corp.
<input type="radio"/>	Wheel Loader Pre-Shift Safety Inspection	Created By: Cat Corp.
<input checked="" type="radio"/>	Wheel Loader: Safety & Maintenance	Created By: Cat Corp.

**Selected Clone Form :** Wheel Loader: Safety & Maintenance

- Click OK at the Form Cloning Confirmation window
- Edit/Add Categories as required, click
- Edit/Add Questions as required, click
- Preview and Submit

**NOTE:** If cloning to update a form name and contents, remember to archive the old form.

## Form Types

\* Highlighted form types **DO NOT FLOW** back to VisionLink

- **CCR** - Cat Certified Rebuild: steps to perform a Cat Certified Rebuild
- **Component D&A** - Disassembly and Reassembly: steps to perform a D&A inspection
- **Contamination Control** - steps to perform an assessment on a facility to see if they are in compliance with standards
- **Daily** - steps to perform a daily walk around an asset prior to operation
- **Dealer Retail Experience** –
- **Dealer Process** - inspection that outlines a dealer created process (dealer created forms)
- **Field Follow** - Used for tracking field follow programs
- **GET** - Ground Engaging Tools: Inspection used for determining which GET to use
- **Hydraulics** - Category for dealers and customers to create forms specific to hydraulic inspections
- **Legal** - Still in development on what this will be. More to come in next month or two
- **Monthly** - steps to perform a monthly occurring inspection. Cat does not create these, but instead is a category available for dealers and customers to use
- **PDI** - Pre-Delivery Inspection: steps to perform before delivering an asset
- **PM** - Planned Maintenance: inspections created by dealers to do planned maintenance
- **PM Checklist** - Planned Maintenance Checklist: inspections to do planned maintenance, information is fed from SMI
- **PSSR** - Parts and Service or Product Support Sales Rep: inspection for a PSSR to do a quick walk around the asset
- **Safety** – safety related inspections
- **TA1**- Technical Analysis 1: Steps to perform a TA1
- **TA2**- Technical Analysis 2: Steps to perform a TA2
- **Validation** - inspection created to do test validation
- **Weekly** - steps to perform a weekly occurring inspection. Cat does not create these, but instead is a category available for dealers and customers to use
- **Yearly** -steps to perform a yearly occurring inspection. Cat does not create these, but instead is a category available for dealers and customers to use

## Recommended Option Sets

Option sets are response sets for tasks, available in a wide range of languages.

Recommended that Option Sets be set to 'Favorites' to ease search

Option sets that are only set as Favorites for that day (i.e. will need to be reset with each day users login)

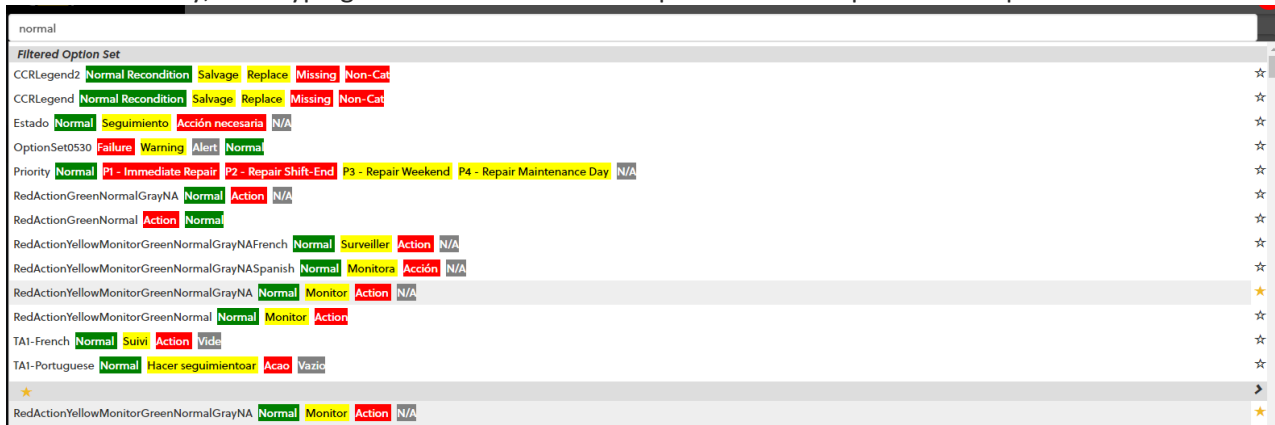
To select an Option Set:

Option Set \*



Clicking into the Option Set field will open up the **entire** list of available choices.

- To search library, start typing in a word and available options will auto-pull to the top



- To eliminate having to open this list every time, look up the Option Sets to be used, and click the to set it as Favorite.
- Once the set has been set as a Favorite, the star will change to and be listed under the Favorites drop down

Option Set \*

Selected :RedActionYellowMonitorGreenNormalGrayNA ✖

Option Set 📄

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▼


RedActionYellowMonitorGreenNormalGrayNA ★

*All Option Sets* +

1 ~ 5段階の満足度 ☆

1-5 Memnuniyet Düzeyi ☆

In the Option Set field, click the Export icon to export library into Excel (as required):





## Typical Recommended Option Sets

RedActionYellowMonitorGreenNormalGrayNA **Normal** **Monitor** **Action** N/A

ActionPerformedRating **Performed** **Not Performed** **Performed with Issue** N/A

OkNotOk **OK** **NOT OK** N/A

RedFailGreenPassGrayNA **Pass** **Fail** N/A

GreenYesRedNoGrayNA **Yes** **No** N/A

RedYesGreenNoGrayNA **Yes** **No** N/A

Condition **New** **VG** **Good** **Fair** **Poor** N/A

OilLevels **Low** **Within Operating Range** **Overfull** **Not Checked** N/A

Coolant Level **Above Glass** **Below Glass** **In Glass**