

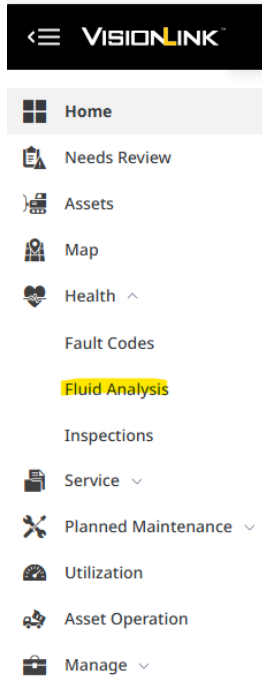
## Quick Guide to View Fluid Sample Results in VisionLink

- Notifications, Reports, Groups

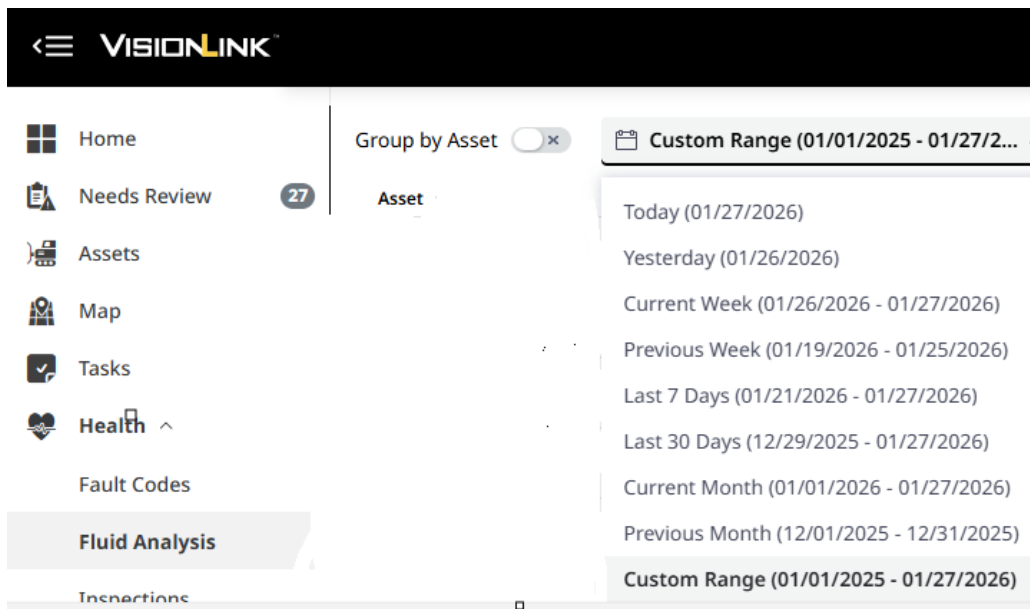
Login to VisionLink

<https://vl.cat.com>

Scroll down to “Fluid Analysis” under “Health”

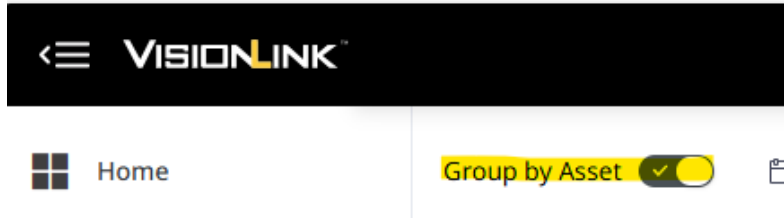


Set Date Range




### Toggle “Group by Asset”

- This will allow individual sample(s) to be viewed by compartment or for samples to be summarized by serial number

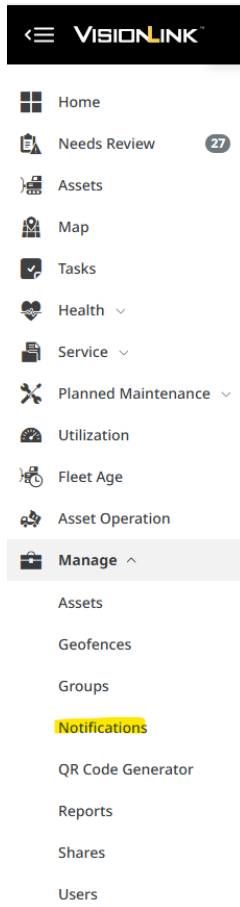


To view sample details, click on asset and then click on “blue” sample number to view sample details

	<b>ZB24852</b> 262D3 - CAT - ZB204852	● 0 ACTION REQUIRED	● 0 MONITOR	● 1 NO ACTION
● 0 ACTION REQUIRED	● 0 MONITOR	● 1 NO ACTION	📅 Custom Range (01/01/2025 - 01/27/2... ▾	🔍 Find samples
Sample ▾	↓ Sample Date ⓘ ▾	Analysis Date ⓘ ▾	Severity ▾	
ENGINE E490-55325-0015 ↗	11/20/2025	11/21/2025	⋮ ● NO ACTION	

## Notifications –

- Notifications are set so that the user can be notified there is either a “Monitor” – Yellow or an “Action Required” - Red sample
- To set a notification, select “Notifications” under the “Manage” tab



Select “Add Notification”

VISIONLINK Filters Search assets Help Center WYOMING KJ

Show Only Mine Show All Add Notification

Find notification

Title	Type	Email	Needs Review	Text
^ HEALTH (3) + Add Notification				
Default - Fluid Sample	Fluid Sample You will be notified when the fluid samples result is...	5761	Cat	615
			<input type="checkbox"/>	<input checked="" type="checkbox"/>

Select "Fluid Sample"

Add Notification

Search

Fluid Sample

Check desired notification(s) - "Action Required" and/or "Monitor"

Add email address for Recipient; Select "Add"

## Add Fluid Sample Notification



### Setup

Notification Name

0 / 100

Fluid Sample is:







- Action Required**     **Monitor**

Summary:

### Asset Inclusion

- All Assets**    On Jobsite    In Geofence    In Group    Selected Assets

You will receive notifications on all eligible assets in your fleet.

	<b>130</b> 824C - CAT - 85X00474
	<b>14012</b> JOHNDEERE_UNKNOW...
	<b>141</b> D9L - CAT - 14Y02667
	<b>147</b> D9L - CAT - 14Y03294
	<b>157</b> D9L - CAT - 14Y02102
	<b>1610</b> 631D - CAT - 24W01934

### Recipients

Select who will receive these notifications.

-

## Reports -

- Provides a summary email of samples that have been processed.
- Summary email can be daily, weekly, monthly etc.
- This is probably the closest method to view sample results like today's present emails



- Home
- Needs Review
- Assets
- Map
- Health ▾
- Service ▾
- Planned Maintenance ▾
- Utilization
- Asset Operation
- Manage ^
  - Assets
  - Customer Users
  - Dealer Settings
  - Dealer Users
  - Geofences
  - Groups**
  - Notifications
  - QR Code Generator
  - Registrations
  - Reports**

Select "Add Report"

The screenshot shows the VISIONLINK 'Manage Reports' interface. At the top, there is a navigation bar with 'VISIONLINK', 'Filters', 'Search assets', and 'Help Center'. On the right, it shows 'WYOMING' and a user profile 'KJ'. Below the navigation bar, there are tabs for 'Manage Reports' and 'Templates'. A sidebar on the left contains 'Home' and 'Needs Re...'. The main content area features a 'Show Only Mine' button, a 'Show All' button, a search bar for 'Find Reports', and a count of '0'. There are navigation arrows and a download icon. A prominent yellow 'Add Report' button is on the right. Below this is a table header with columns: 'Report Name', 'Report Type', 'Owner', 'Frequency', 'Format', and 'Recipients'.

Scroll down to "Fluid Analysis"

The screenshot shows the 'Add Report' dialog box. It has a title bar with 'Add Report' and a close button 'x'. Below the title bar, there are two steps: '1 Asset Selection' and '2 Schedule Report'. The 'Asset Selection' step is active. A dropdown menu is open, showing 'Scheduled Report Type' and 'Select Report Type'. The dropdown list contains the following options: 'Fleet Fuel', 'Fleet Status', 'Fleet Usage', 'Fleet Utilization', 'Fluid Analysis' (highlighted in yellow), and 'Site Runtime'.

## Select assets for report (typically “All Assets”)








**Add Report**
×

**1 Asset Selection**
————
2 Schedule Report

Scheduled Report Type  
 Fluid Analysis ▼

All Assets
On Jobsite
In Geofence
In Group
Selected Assets

This report will contain data for all eligible assets in your fleet.

	323-07 - CAT - RAZ11351
	<b>0021</b> 375H - SULLAIR - 2010...
	<b>004-0031</b> 777G - CAT - RDR00352
	<b>004-0032</b> 777G - CAT - RDR00243
	<b>005-0018</b> D10R - CAT - 3KR01414
	<b>005-0026</b> D11T - CAT - JEL00153
	<b>007-0006</b> 16M - CAT - R9H00690

## Select Report “Format” and Report “Frequency”

**Add Report**
×

**✓ Asset Selection**
————
**2 Schedule Report**

Report Name  


21 / 100

Format  

CSV ^

CSV  
 XLSX  
 PDF  
 JSON  
 XML

Frequency

Start Date

Report will be delivered immediately.

Language

**Add Report**
×

**✓ Asset Selection**
————
**2 Schedule Report**

Report Name  


21 / 100

Format

Frequency

Start Date

End Date

Report will be delivered immediately. Date range is limited to 31 days

Language

Download

Once

Daily

Weekly

Monthly

Next, add “Email Subject Line” and “Email Recipient”  
Select “Add” at bottom of menu

## Add Report



### Email Information

Email Subject

Fluid Analysis Once Report

26 / 200

Email Content (Optional)

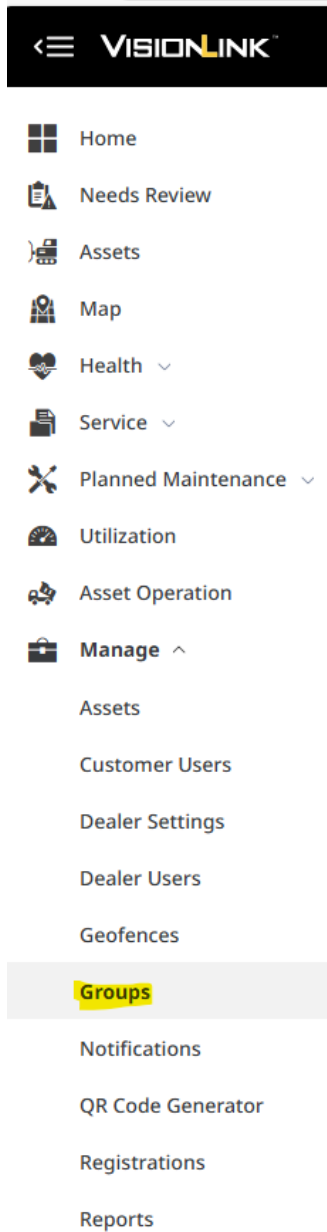
0 / 2500

Add Recipient (Consent ⓘ)

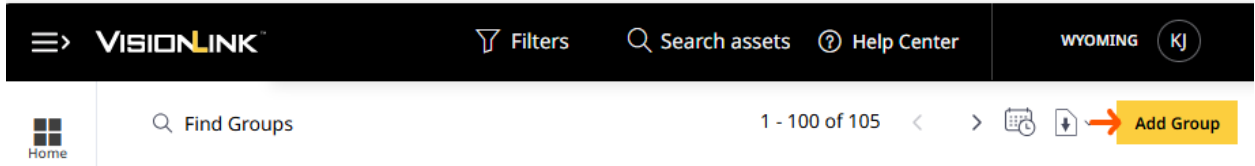
🔍 Add recipient

## Groups -

- Groups assets into subsets like SOS Jobsites (Casper Machines, Cheyenne Machines, etc.)



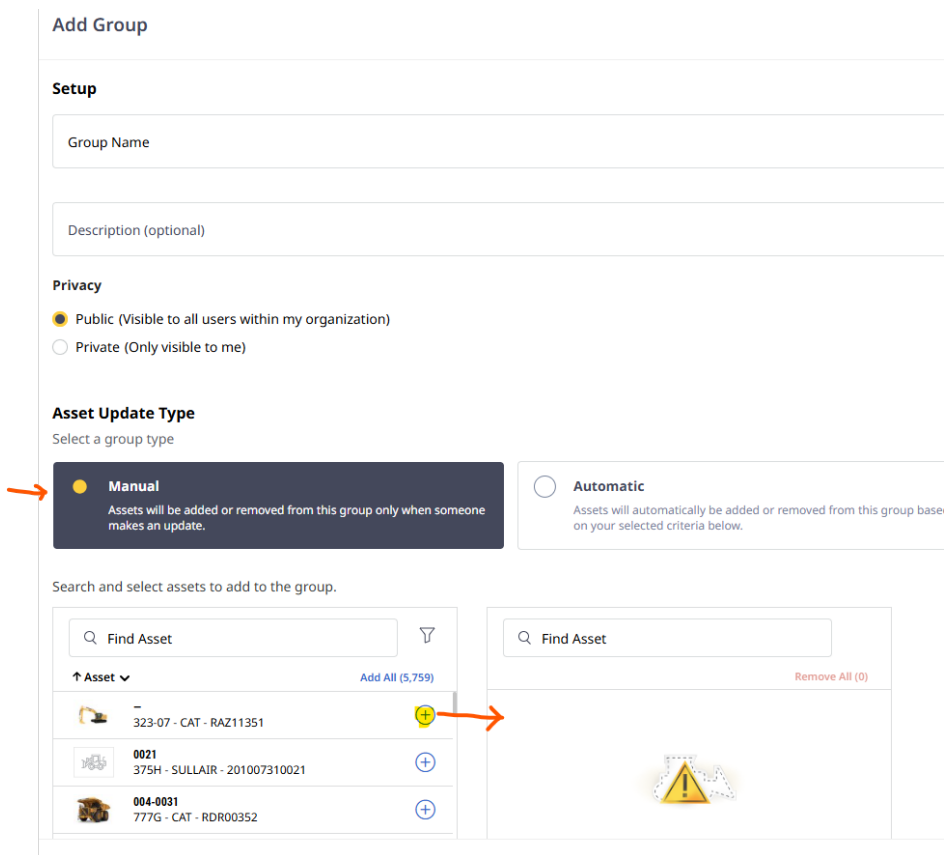
Select "Add Group"



Enter "Group Name" and Description

Assets can be added to group either "manual" or "automatic"

Under the manual option, find the asset and then select (+) to add to the Group



# Using Groups to Filter Asset SOS sample results

- Once a group has been set up (“DOZERS” in this example)

### Add Group

**DOZERS** 6 / 500

**Privacy**

Public (Visible to all users within my organization)

Private (Only visible to me)

**Asset Update Type**

Select a group type

**Manual**  
Assets will be added or removed from this group only when someone makes an update.

Automatic  
Assets will automatically be added or removed from this group based on your selected criteria below.

Search and select assets to add to the group.

Find Asset

↑ Asset ↓ Add All (313)

1100 D9L - CAT - 14Y01372	⊖
116 D9L - CAT - 14Y02004	⊖
120 D9L - CAT - 14Y02139	⊖
127 D9L - CAT - 14Y02377	⊖

Find Asset

Remove All (4)

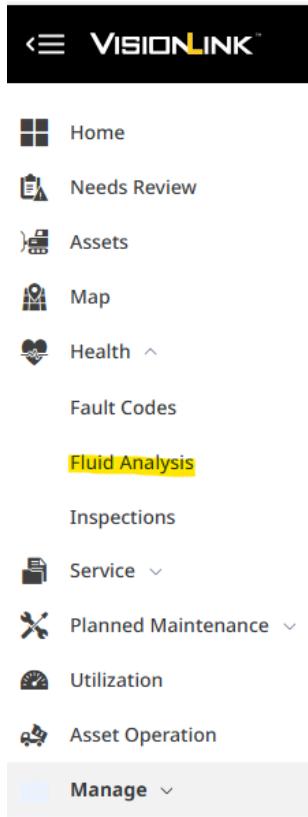
1100 D9L - CAT - 14Y01372	⊗
116 D9L - CAT - 14Y02004	⊗
120 D9L - CAT - 14Y02139	⊗
127 D9L - CAT - 14Y02377	⊗

Cancel → Add

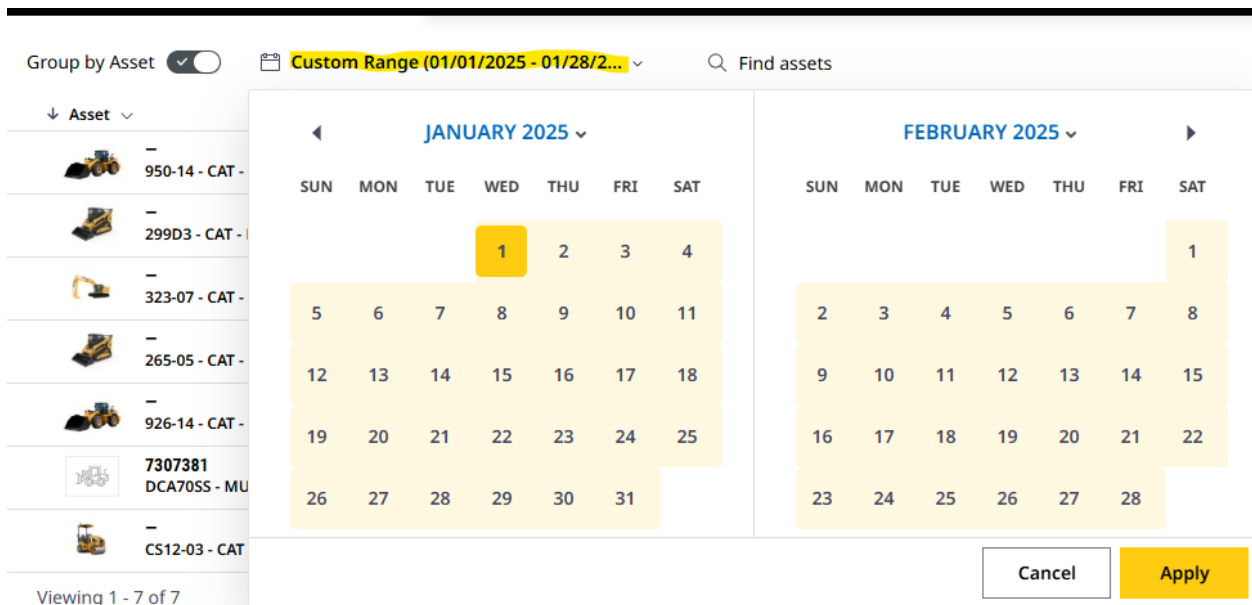
## “DOZERS” Group (example)

Home	Find Groups	1 - 1 of 1	<	>	Calendar	Download
Needs Re...	↑ Group Name ↓	Assets ↓	Asset Update Type ↓	Privacy ↓	Creation Date ↓	
	★ DOZERS	4	Manual	Public	01/28/2026	

To view sample results, go to “Fluid Analysis” from the main VisionLink drop-down menu



### Set Date Range



Select "Filters" at the top of the menu

Select the "Group Name" (i.e. Dozers) under Asset Filters

Select "View Assets" ( four assets in this example)

- Fyi - "View Assets" tab will not highlight if there are no samples to view or there are no samples within the selected date range)

The screenshot shows the VISIONLINK interface. The top navigation bar includes a menu icon, the VISIONLINK logo, a Filters icon (highlighted with an orange arrow), and a search icon. The left sidebar contains navigation options: Home, Needs Re... (with a '4' notification), Assets, Map, Tasks, Health (highlighted), and Service. The main content area shows a 'Group by Asset' toggle and a 'Custom Range (01/28/2024 ...)' dropdown. Below this is a table of assets with columns for Asset, Severity, and a 'View 4 Assets' button (highlighted with an orange arrow).

Asset	Severity
ZB24852 262D3 - CAT - ZB2048...	1
WRN516 D6TVP - CAT - WRN00...	5
2175 980K - CAT - W7K00518	0
- A45G_VOLVO - VOLV...	0

In this "Dozer" group example, there are samples for the dozers within the selected date range

The screenshot shows the VISIONLINK interface with the 'Health' tab selected in the sidebar. The main content area displays a table of dozer assets with their respective severity and sample counts. The 'View 4 Assets' button is highlighted in yellow.

Asset	Severity	Sample 1	Sample 2
127 D9L - CAT - 14Y02377	0	3	4
120 D9L - CAT - 14Y02139	0	5	7
116 D9L - CAT - 14Y02004	7	3	6
1100 D9L - CAT - 14Y01372	2	4	6