

CHECKLIST

User's Name:

Job Number:

Network Login:

Password:

Installed by:

Role:

Serial Number:

Old Serial
Number:

Item

- ☐ Redirect Documents folder to U drive *migrate to one drive?*
- ☐ Check Fetch opens in Chrome *They have to type in email (goughat group terra)*
- ☐ Setup Outlook & Signature *Can we get it there on first load (people call up)*
- ☐ Copy Desktop files from old computer *Desktop linked to one Drive?*
- ☐ Install Printers *Setup ad groups or clean up (thoughts?)*
- ☐ Check Network Drive mapping (Check audited logins) *Prob fine Accountants?*
- ☐ Copy over bookmarks from old PC – paste in same location on new PC
(c:\users\username\appdata\local\google\chrome\userdata\default\bookmarks.file) *? Can we save to U Drive*
- ☐ Stop any applications from loading on startup (eg. Teams) *Do we delay Teams starting hide in background?*
- ☐ Always on VPN -check connection *Been pretty solid lately.*
- ☐ Windows updates *Build should do it.*
- ☐ Disable offline files *One drive?*

For new dell PC's and Laptops – to stop them from blue screening after going to sleep – until we figure out a permanent fix – delete the below highlighted folder in registry

DATA
HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\Power\PowerSettings\238C9FA8-0AAD-41ED-83F4-97BE242C8F20\7bc4a2f9-d8fc-4469-b07b-33eb785aaca0

And block sleep in BIOS

might be fixed with patch

CHECKLIST

Pin to Taskbar:

- ☐ Quick Assist
- ☐ Settings
- ☐ Teams

- ☐ Software Centre
- ☐ Control Panel
- ☐

Do this?

- ☐ Install .NET Framework 3.5 (Needed for VIMS PC)
- ☐

Other:

- ☐
- ☐

Optional:

- ☐ Download Dell Support Assistant
- ☐ Scan for driver updates and install in Dell support
- ☐

- ☐ Download HP Support Assistant
- ☐ Scan for driver updates and install in HP Support
- ☐

*Should we update
driver packs
more regularly?*

CHECKLIST

Please review the installation/recommendation lists from Andrew Stockdill

PART I - SOFTWARE:

SCM

Electronic Technician (download from <https://dealer.cat.com/en/ps/service/software/cat-et.html> or Resources Drive)

SIS USB - Typically only Field Service (Software contained on SIS USB Drive or Resources Drive)
5/11/2020 - Soon to be SIS2GO app within the next 6 months

SIS Web Icon / shortcut on Desktop - label the icon correctly (SIS Web)
SIS Web is now <https://sis2.cat.com> - was <https://sis.cat.com>

VIMSpC (download from Resources Drive)

PLUS+1 Service Tool (download from <https://dealer.cat.com/en/ps/service-tools.html> or Resources drive)

USB to Serial Adapter Drivers (old and new part number as both adapters are still being used in the field)

Comm Adapter 3 (download from resources drive)

Few and far between still should be in SCM

Not all Technicians need the following. Check with them or their manager to see if they do need

IQAN (only needed on selected laptops who have existing subscriptions). License key obtained from Tech Services

CDVR PC Software (Used by Technicians who do generator work). Download from SIS Web 'Downloads' page

Olympian Compass - Standalone (Used by Technicians who do generator work)

Challenger Technician (download from Resources Drive)

M300 Technician (download from Resources Drive)

Engine Reprogramming Tool - ERT (download from <https://dealer.cat.com/en/ps/service/software/downloads.html>)

CHECKLIST

PART II - INSTALLATION REQUIREMENTS:

Electronic Technician

Create a doc for tech to follow?

License the software before dispatching laptop or license when received by technician. Software license (Activation ID) to be requested from Tech Services (Andrew Stockdill). When requesting New Activation ID please provide laptop serial number, Technicians Name and Branch Location. If transferring ET from existing laptop please provide details of old laptop (S/N, User Detail) and details of replacement laptop (laptop serial number, Technicians Name and Branch Location).

Make sure ET is started after installed and licensing completed (there is an occasional loss of mfc140u.dll file from the 'C:\Windows\SysWOW64' folder and the 'C:\Windows\System32' folder).

In ET Preferences disable the 'Automatically Connect Upon Startup' setting, select the PDF option in Product Status Report tab and 'Check All' in the Product Status Report tab.

Ensure Technician or the laptop is in the group for automatic ET updates

SIS USB (Typically only Field Service)

create a doc?

License the software before dispatching laptop or license when received by technician. Software license (Activation ID) to be requested from Tech Services (Andrew Stockdill). When requesting New Activation ID please provide laptop serial number, Technicians Name and Branch Location. If transferring ET from existing laptop please provide details of old laptop (S/N, User Detail) and details of replacement laptop (laptop serial number, Technicians Name and Branch Location).

Install relevant 'Data Month' from USB

Load Dealer SIS USB User Profile. This is the file which sets SIS USB User Name (GGHSIS) and Password (TRACK)

Under IE Tools, select Manage Add-Ons, Change 'Adobe PDF Reader' from 'Enabled' to 'Disabled'. Making this change allows PDF schematics to open outside the IE Browser page

Under IE Tools, select Internet Options. Select 'Security Tab', select 'Trusted Sites', click on 'Sites' and check 'https://127.0.0.1' is listed. If not there, please add it. Making this change prevents error message about not being able to view graphics in 'protected mode' when outside data coverage area.

Install plugins x3 (DJVU, IsoView, Creoview)

Validate all three graphics drivers (DjVu, IsoView and CreoView) are functioning correctly, this exercise is best done using F7G prefix. For DjVu check the parts image for the camshaft, for IsoView check the Disassembly/Assembly detail for the camshaft and for CreoView check the 241-3750 Travel Motor Lines Group.

Open an Electrical Schematic to ensure the document opens outside of SIS (this should happen for SIS Web and SIS USB if using IE).

CHECKLIST

VIMSpC

SCCM

Software needs to be installed, there is no license. A copy of the latest software can be found in then 'Resources' Drive.

Download and install latest Master Database (<https://dealer.cat.com/en/products/technology/minestar-solutions-surface/health/applications.html>)

PART III - EXTRA'S / RECOMMENDATIONS

User based settings or computer?

Consider the amount of time a laptop will remain 'Unlocked' for. We use to have a 'service group' that allowed users in this group to keep their laptop unlocked for an hour. The purpose behind this group was to avoid a laptop 'locking' while flashing software into a machine/engine ECM. We've had a couple of instances (not recently) where screen lock activated during a software upload resulting in ECM failure. There are also other side effects that don't always result in ECM failure, but take a lot of time to recover / resolve.

Laptops should have SIM card for Network Access (subject to branch manager / IT approval)

Set up DameWare to allow Tech Services ability to control laptop remotely. All new laptops have been going out where we have ability to view remotely, but not control mouse or keyboard. The 'View Only for these account types' setting needs to be disabled (unchecked). This can be seen under the access tab of the 'DameWare Mini Remote Control Properties' window.

Check with Employee on any other extra apps they need possibly from Dealer.cat.com