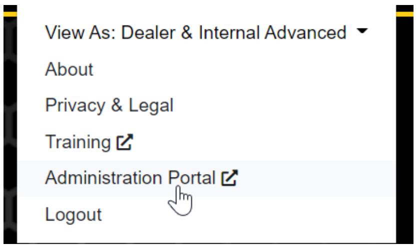
Caterpillar® SIS 2.0 ADMINISTRATION GUIDE

This guide documents the steps to access the Administration Portal, as well as how to add, modify, or remove primary dealer and customer user accounts in SIS 2.

Accessing the Administration Portal

On the SIS 2.0 main page https://sis2.cat.com, select the drop down arrow next to your user id in the upper right corner of the page. Select Administration Portal.



Note: Only current SIS Administrators will see this option. If a user needs to request SIS Administrator access, please send the request to ebiz_apps_support@cat.com.

SIS Administrators can also access the Administration Portal at https://sis2.cat.com/admin.

Instructions for User Management

This section is for adding, modifying, and removing Primary Dealer and Customer User Access Types in SIS 2.0.

See the Appendix at the end of this guide for details of Dealer and Customer access types.

Adding New Users

Dealer users:

New dealer users are auto-registered in SIS 2.0. When a new dealer employee is hired, their credential is created in LDAP. When the user tries to access SIS 2.0, the system will recognize that they are a dealer employee and create an account for the user with **Dealer and Internal Standard (current title)** / **Dealer Parts & Service - Green (future title)** access. A Dealer SIS Administrator can then change the user's access if necessary, by following the **Modify Existing Users** steps below. The dealer SIS Administrator also has the option of creating an account for the user with the desired access type before the user accesses SIS 2.0, as shown in the **Instructions** below.

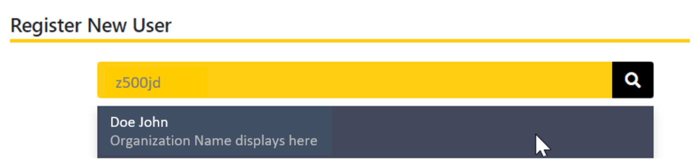
Customer users:

All customers that initially register through Parts.Cat.Com (PCC) are identified throughout this document as Instant Access E-Customers. Customers registering through PCC will continue to be automatically granted SIS Web access but will not automatically be granted SIS 2.0 access until the PCC integrations are live (date TBD). In the interim, this means Dealer SIS Administrators will need to manually add newly registered Instant Access E-Customers to SIS 2.0 if they do not want to wait for an automated load process that will occur at the end of each month. These users can be identified by manually referencing SIS Web. Manually adding users may be especially necessary if the dealer enables the DMT functionality to direct all customer users to SIS 2.0 **(DMT functionality will be covered in the Customer Migration Ask the Expert Session on PCC Integrations with SIS 2.0. See Events on the SIS 2.0 Community. Click here for session details).**

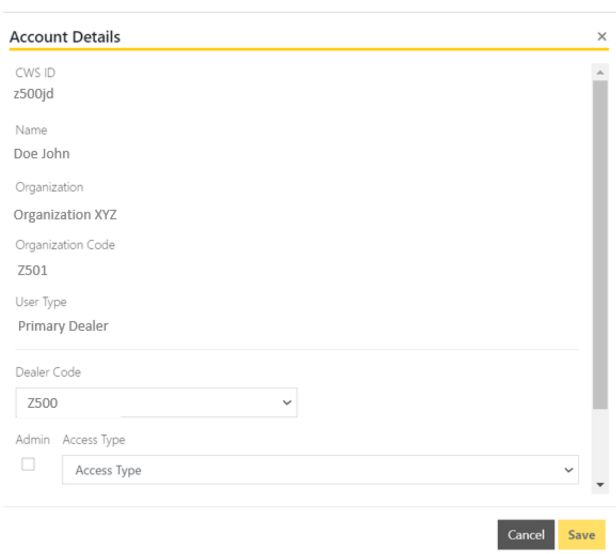
Future feature: Instant access E-Customer users will be auto-registered with SIS 2.0 access as **Customer Basic** **(current title) / Customer Parts Only** **(future title)**. A dealer SIS Administrator can then change the user's access to a different customer access type if necessary, by taking the **Modify Existing Users** steps below.

Instructions:

1. Click the **register new user** icon and enter the CWS id of the user. Click the **search** icon , then select the user in the results.
   Note: Users require a CWS account before a Dealer SIS Administrator can manually add them to SIS 2.0 and grant access. Identity Managers can create new customer IDs using the Customer .pdf Job Aid in IdentityIQ. Alternatively, customers can self-register in PCC to create new IDs.

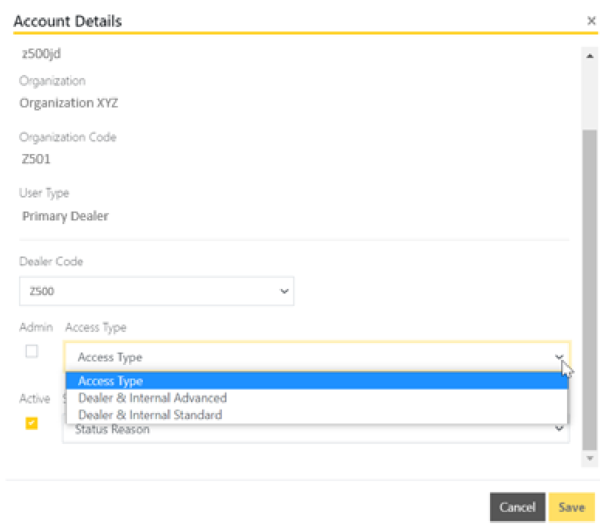


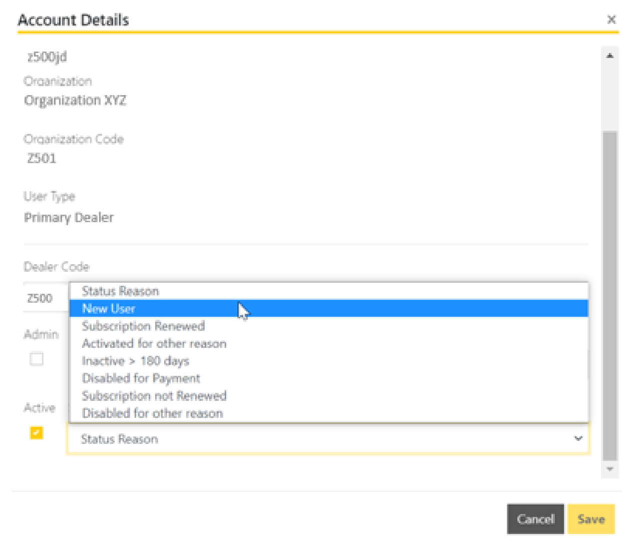
2. Account Details pop-up box will display with pre-populated information from Global Directory for the user id.



3. Select the appropriate **dealer code** (if required). *Note: This is the Top-Level Dealer Code. For example, if your Top-Level Dealer Code is Z500 and there are lower level Organization Codes under that code (ex: Z501, Z502, Z503), the option you will see is Z500. See the Code & Organization section under SIS 2.0 Administration Changes below for more details.*

4. Select the appropriate access from the **access type** drop-down menu. *Note: Dealer users can be modified to Dealer or Customer access types and Customer users can be modified to any of the Customer access types.*
5. Select a **status reason** and verify the **active** box is checked
6. Click **save**.



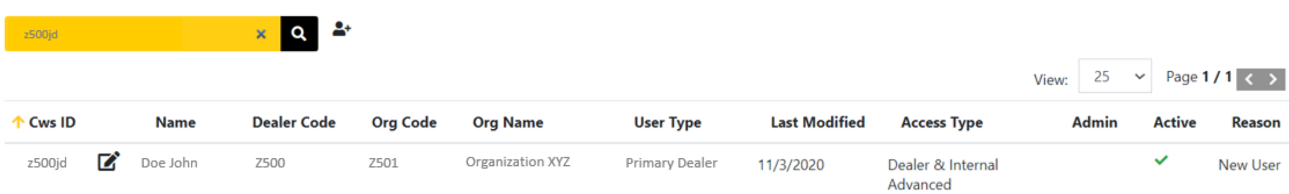


Modify Existing Users

Instructions:

1. Click the **search** icon and enter the CWS id of the user 

. Click the **search** icon again or press enter.
2. Click the **edit user** icon next to the user to be modified. In the Account Details pop-up box, select appropriate **dealer code** (if required). *Note: This is the Top-Level Dealer Code. For example, if your Top-Level Dealer Code is Z500 and there are lower level Organization Codes under that code (ex: Z501, Z502, Z503), the option you will see is Z500. See the Code & Organization section under SIS 2.0 Administration Changes below for more details.*



3. Select the appropriate access from the **access type** drop-down menu. *Note: Dealer users can be modified to any of the dealer or customer access types. Customer users can be modified to any of the customer access types.*
4. Select the **status reason** and verify the **active** box is checked.
5. Click **save**.

Removing Users

Instructions:

To deactivate a user at any time, a Dealer SIS Administrator can take the following steps:

1. Click the **search** icon and enter the CWS id of the user. Click the **search** icon again or press enter.
2. Click the **edit user** icon next to the user to be modified.
3. In the Account Details pop-up box, Select the appropriate **dealer code**. *Note: This is the Top-Level Dealer Code. For example, if your Top-Level Dealer Code is Z500 and there are lower level Organization Codes under that code (ex: Z501, Z502, Z503), the option you will see is Z500.*
4. Select the appropriate access from the **access type** drop-down menu. *Note: User's current access type is shown in the search results screen, if needed.*
5. Select a **status reason** and verify the **active** box is un-checked *Note:* Deactivated users will still display in your administration screen after unchecking the active box. Unchecking the active box disables SIS 2.0 access but does not disable or remove the CWS ID.
6. Click **save**.

Future feature: Caterpillar will perform a clean-up to remove non-active user accounts. Details on which non-active accounts will be removed will be communicated in the future (date TBD).

SIS 2.0 Administration Changes

Below are key differences in how SIS 2.0 users are administered, as compared to SIS Web:

- **New Dealer and E-customer users are auto-registered in SIS 2.0**
  - **What this Means:**
    - Dealer SIS Administrators will no longer need to add new dealer users for access. New dealer users are auto registered in SIS 2.0. When a new dealer employee is hired, their credential is created in LDAP. When the user tries to access SIS 2.0, the system will recognize that they are a dealer employee and create an account for the user with a **Dealer and Internal Standard (current title)** / **Dealer Parts & Service - Green (future title)** access type.
    - **Future feature:** Customer that initially register through PCC will be auto registered with SIS 2.0 access as **Customer Basic (current title) / Customer Parts Only (future title)**.
- **New User Identity Fields in SIS 2.0 Administration Portal**
  - **User Type Field:** User types C, P, and R are not used in SIS 2.0. Instead, CWS ID affiliations from Global Directory (the safe source for user identities that populates CLUES) are used to populate User Type in SIS 2.0 (Primary Dealer, Dealer Customer, E-Customer, etc.). User Type also determines the Access Type each user is permitted.
    - **What this Means:** C, P, and R users will no longer be used or available in SIS 2.0. CWS IDs should be set up with the appropriate affiliation instead.
    - *Notice when assigning customer user IDs and affiliations:* Every customer user should typically have only one identity—i.e., one CWS ID and one affiliation. For example, Joseph Smith at Smith's Landscaping should have only one CWS ID with an affiliation of Dealer Customer.
  - **Access Types:** Dealer customized profiles are not used in SIS 2.0. Instead, dealer and customer users are assigned a standard SIS 2.0 Access Type. This change further protects technical information by limiting access to confidential information to authorized personnel.
    - **What this Means:** When a Dealer SIS Administrator manually adds a new user or modifies an existing user in SIS 2.0, they will be able to modify the Access Type for the user by choosing from the set of allowable access levels in the Access Type drop-down. For a summary of allowable Access Types, refer to Dealer and Customer Access Types in the Appendix.
  - **Code & Organization:** Org Code is the organizational code in Global Directory. Dealer Code is the top-level dealer code for that org code. Org Name is typically thought of as the user's employment and can reflect who the user works for (i.e., who the user receives their paycheck from).

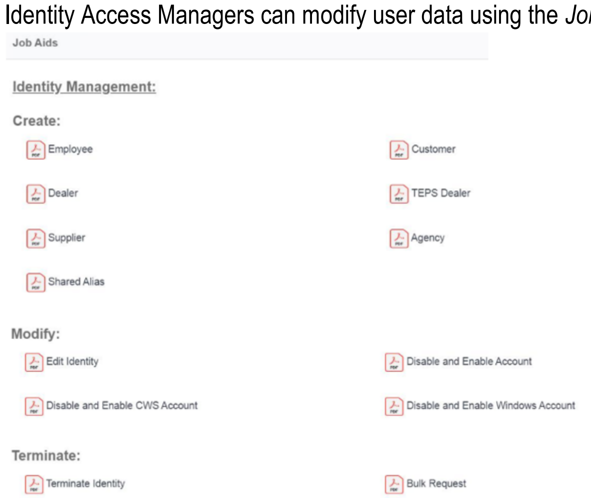
    All user affiliations come from Global Directory and are established and managed by your dealership's Identity Manager.

    Most Specialty Customer affiliations (OEM Customer, Fleet Customer, etc.) and all NON-customer affiliations, including Second Level Dealer, are managed outside of dealer SIS Administrator role and not covered in this document.

Note: If your dealership does not have an Identity Manager, the appointed person will need to call Caterpillar's help desk to request an Identity Manager be set up within IdentityIQ.

A. Verify the following user information is accurate:
   a. Dealer Code
   b. Affiliation Code / Affiliation Description (Affiliation Description is automatically populated by Affiliation Code)
      Note:
      1. Primary Dealers are assigned to **005** affiliation. Customers are typically assigned one of the following general customer affiliations: **004** E-Customer, **020** Dealer Customer, or **003** Customer (Caterpillar Customer).
      2. If a customer is assigned a customer affiliation other than these three (e.g., 028 (Solar Customer)), the administrator will only be able to grant Parts Only access for that user. *If you feel a customer affiliation other than these three (004, 020, 003) is appropriate for any of your customers AND that affiliation should be granted more than Parts Only access, submit a request with your business case to ebiz_apps_support@cat.com*
   c. Organization Code / Organization (Organization is automatically populated by Organization Code)

B. Identify data inaccuracies and notify your Identity Manager so s/he can make necessary corrections.
   i. Identity Access Managers can modify user data using the *Job Aids* in IdentityIQ:



Appendix

Dealer and Customer Access

Note: All two Dealer Access and four Customer Access Types grant access to the entire Cat® product line. Limiting access by serial number prefix is not available in SIS 2.0.

	Dealer SIS Access Types		**Customer SIS Access Types**			
	Dealer & Internal Advanced	Dealer & Internal Standard	Customer Advanced	Customer Vocational School	Customer Standard	Customer Basic
Information Types	**Dealer Parts & Service (Yellow)**	**Dealer Parts & Service (Green)**	**Customer Parts & Service**	**Vocational School Parts & Service**	**Customer Parts & OMM**	**Customer Parts Only**
Applied Failure Analysis	Yes	Yes	Yes	Yes	No	No
As Shipped (Engine)	Yes	Yes	Yes	Yes	No	No
Bench Test Procedures	Yes	Yes	No	No	No	No
Caterpillar Certified Rebuild	Yes	Yes	No	No	No	No
Contamination Control Guidelines	Yes	Yes	No	No	No	No
Custom Service Information	Yes	Yes	Yes	No	No	No
Cylinder Files	Yes	Yes	Yes	No	No	No
Dealer Similar Parts	Yes	Yes	No	No	No	No
Disassembly & Assembly	Yes	Yes	Yes	Yes	No	No
ECM Replacement Files	Yes	Yes	Yes	Yes	No	No
Engine News	Yes	Yes	Yes	Yes	No	No
Engine Performance Specifications	Yes	Yes	Yes	Yes	No	No
Engine Tool Guide	Yes	Yes	Yes	Yes	No	No
Flash Files	Yes	Yes	No	No	No	No
General Service Information	Yes	Yes	Yes	Yes	No	No
Information Relese Memo	Yes	Yes	No	No	No	No
Injector Trim Files	Yes	Yes	Yes	Yes	No	No
Kits Information	Yes	Yes	Yes	Yes	Yes	Yes
Lift Truck Technical Bulletin	Yes	Yes	Yes	Yes	No	No
Microfiche	Yes	Yes	Yes	Yes	Yes	Yes
NPR	Yes	Yes	Yes	Yes	Yes	Yes
Operation and Maintenance Manual	Yes	Yes	Yes	Yes	Yes	No
Parts Identification	Yes	Yes	Yes	Yes	Yes	Yes
Parts Identification Expanded Mining	Yes	Yes	Yes	Yes	Yes	Yes
Remanufactured Injector Trim Files	Yes	Yes	Yes	No	No	No
Repair Option Builder/CSA Information	Yes	Yes	No	No	No	No
Reuse and Salvage Guidelines	Yes	No	No	No	No	No
Safety	Yes	Yes	Yes	Yes	Yes	Yes
Safety Expanded Mining	Yes	Yes	Yes	Yes	Yes	Yes
Schematic	Yes	Yes	Yes	Yes	No	No
Service Letter - Americas	Yes	No	No	No	No	No
Service Letter - APD	Yes	No	No	No	No	No
Service Letter - CSARL	Yes	No	No	No	No	No
Service Letter - NACD	Yes	No	No	No	No	No
Service Letter - Truck/Ag/Marine	Yes	No	No	No	No	No
Service Magazine	Yes	Yes	Yes	Yes	No	No
Shop Review	Yes	Yes	No	No	No	No
Special Instruction	Yes	Yes	Yes	Yes	No	No
Specifications	Yes	Yes	Yes	Yes	No	No
Systems Operation	Yes	Yes	Yes	Yes	No	No
Systems Operation - Fundamentals	Yes	Yes	Yes	Yes	No	No
Technical Analysis	Yes	Yes	No	No	No	No
Technical Information Bulletin	Yes	No	No	No	No	No
Testing and Adjusting	Yes	Yes	Yes	Yes	No	No
Tool Guide	Yes	Yes	Yes	Yes	No	No
Tool Operating Manual	Yes	Yes	Yes	Yes	No	No
Torque Specifications	Yes	Yes	Yes	Yes	No	No
Troubleshooting	Yes	Yes	Yes	Yes	No	No
Truck Engine News	Yes	Yes	Yes	Yes	No	No
Undercarriage Reconditioning Bulletin	Yes	Yes	No	No	No	No
View As Mode (Demo Mode)	Yes	Yes	No	No	No	No

Note: Users are only given access to Service Letters applicable to their marketing organization.