**Ask the Experts – SIS 2.0 Administration Portal**

**SIS 2.0 Administration Guide:**

[SIS 2.0 Administration Guide \_Sharepoint](https://urldefense.com/v3/__https:/caterpillar.sharepoint.com/:b:/r/teams/SIS2/Customer*20Migration*20Resources/SIS*202.0*20Administration/SIS*202.0*20SIS*20Administration*20Guide*20.pdf?csf=1&web=1&e=XtLbif__;JSUlJSUlJSUl!!FRLE-BHliQ!m7hvA4iHXQzqsX9ljOCAQN62cJqmaoZypmzOvg51mkPPf61x_IzC_lAMbScvAbaxNg$)

[SIS 2.0 Administration Guide\_Dealer.cat.com](https://dealer.cat.com/en/ps/service/software/administration.html) - at the bottom, under SIS Administration tab

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**Question/Answers from Ask the Experts SIS 2.0 Administration Portal Sessions Jan 20-22**

1. **How can I get total number of users at a time? Can I export this list?**

*Export functionality is not currently available in SIS 2.0, planned for 4Q 2021. Until then, please use the following workaround: from the SIS 2.0 Administration Portal, copy and paste into excel. You will need to do this for each page. To minimize the number of pages, change your view at the top of the admin page to the highest # allowed. This also will assist in total number of users, as well the using the LH filter to see total numbers of user types.*

1. **Is this the e-mail address that I contact if I see the wrong dealer code under my admin access?**

[*Ebiz\_apps\_support@cat.com*](mailto:Ebiz_apps_support@cat.com)*. Please note that SIS 2.0 uses top level dealer codes, rather than org codes that were used in SIS Web. Org codes in SIS 2.0 are displayed for informational purposes only. You can also reach out to your SIS 2.0 Service Innovation Consultant, listed at the top of this page for further assistance.*

1. **How would we add/register users without a CWS ID?**

*Users must have a CWS ID to access SIS 2.0.*

1. **When adding or changing a user in SIS 2.0, is it live/accessible immediately for the user?**

*Yes*

1. **Can we modify several users at the same time?**

*Bulk editing is currently not an option. We have heard that from others and added as an enhancement request.*

1. **What about SIS 2 customers access validity?**

*The account access allowable to be granted is based on the user affiliation provided by Caterpillar Global Directory.*

1. **Access to Technical Information Bulletins (TIB)?**

*Dealer users can access TIBs if they have the Dealer and Internal Advanced (Dealer Parts and Service- Yellow) access type. To see details of what information types each access type includes, please refer to the Appendix within the SIS 2.0 Administration Guide, located in either of these links:* [*SIS 2.0 Administration Guide\_Dealer.cat.com*](https://dealer.cat.com/en/ps/service/software/administration.html) *and* [*SIS 2.0 Administration Guide \_Sharepoint*](https://urldefense.com/v3/__https:/caterpillar.sharepoint.com/:b:/r/teams/SIS2/Customer*20Migration*20Resources/SIS*202.0*20Administration/SIS*202.0*20SIS*20Administration*20Guide*20.pdf?csf=1&web=1&e=XtLbif__;JSUlJSUlJSUl!!FRLE-BHliQ!m7hvA4iHXQzqsX9ljOCAQN62cJqmaoZypmzOvg51mkPPf61x_IzC_lAMbScvAbaxNg$)

1. **When does the auto access to SIS2 start for new customer CWS IDs? I had a new CWS ID yesterday that couldn't log in, so I had to manually add him.**

*Auto registration for new instant access users is currently being developed and planned to be available by early April. Until then, Admin can manually add newly registered E-customers OR wait until our monthly manual load of new e-customers end of each month. Users in Feb 2 load (users that had SIS Web accounts as of Jan 18) are slotted in SIS 2.0 access type based on the information types they have access to in SIS Web. Users added to monthly load after that will be added to SIS 2.0 with customer basic (parts only) access, if the dealer admin has not already created an account in SIS 2.0 for the user.*

1. **Is there any training material to deliver to customers, in order to train customers on SIS 2.0?**

*Yes. Each dealership has employees working directly with SIS 2.0 Caterpillar team for customer migration. They can direct you to the materials available and where located. If you do not know who those contacts are at your dealership, please email your SIS 2.0 Service Innovation Consultant shared at the top of this document and they can provide you a contact. To see the materials available, you can also go to:* [*https://caterpillar.sharepoint.com/teams/SIS2/Customer%20Migration%20Resources/Forms/AllItems.aspx*](https://caterpillar.sharepoint.com/teams/SIS2/Customer%20Migration%20Resources/Forms/AllItems.aspx) *. Note: If you do not have access to our Sharepoint site, you will be given the option to request access, which is typically granted within one business day.*

1. **How can view the details for each profile for the customer profiles?**

*To see details of what information types each access type includes, please refer to the Appendix within the SIS 2.0 Administration Guide, located in either of these links:* [*SIS 2.0 Administration Guide\_Dealer.cat.com*](https://dealer.cat.com/en/ps/service/software/administration.html) *and* [*SIS 2.0 Administration Guide \_Sharepoint*](https://urldefense.com/v3/__https:/caterpillar.sharepoint.com/:b:/r/teams/SIS2/Customer*20Migration*20Resources/SIS*202.0*20Administration/SIS*202.0*20SIS*20Administration*20Guide*20.pdf?csf=1&web=1&e=XtLbif__;JSUlJSUlJSUl!!FRLE-BHliQ!m7hvA4iHXQzqsX9ljOCAQN62cJqmaoZypmzOvg51mkPPf61x_IzC_lAMbScvAbaxNg$)

1. **As an admin for a dealer code, can you change the access level to all users within every org code?**

*As a dealer SIS Admin, you can add or modify user access to any org code under your top-level dealer code.*

1. **What are the conditions to become a SIS 2.0 administrator for dealers and Caterpillar employees?**

The steps to alter your admin rights/access can be directed in a ticket to [ebiz\_apps\_support@cat.com](mailto:ebiz_apps_support@cat.com), sharing your CWS id and dealer code(s) you would want to be added to. Per our security audit process, we would need to obtain approval from a current SIS admin of the dealer code(s) you want SIS Admin access to.

1. **Can you see when a user was last logged in? This was possible to see in SIS Web admin tool.**

This feature is currently not available and is on our enhancement list.

1. **How often does that export of e-customers happen into SIS 2.0?**

*Monthly, until Auto-registration is available (by early April). Until then, an Admin can manually add newly registered E-customers OR wait until our monthly manual load of new e-customers end of each month. Users in Feb 2 load (users that had SIS Web accounts as of Jan 18) are slotted in SIS 2.0 access type based on the information types they have access to in SIS Web. Users added to monthly load after that will be added to SIS 2.0 with customer basic (parts only) access, if the dealer admin has not already created an account in SIS 2.0 for the user.*

1. **Is the customer's list of machines loaded into SIS 2.0?**

*The equipment list feature is currently not available in SIS 2.0. More details will be communicated to your dealership’s Customer Migration Team when available.*

1. **Is there a list of know issues and targeted resolution dates available?**

*Please contact your SIS 2.0 Service Innovation Consultant listed at the top of this document to assist with more details on issues and resolutions.*

1. **Is the Equipment List connected to Equipment Data?**

SIS 2.0 will call Equipment Data *the same way* as PCC does today. When Equipment Lists are (eventually) shown in SIS 2.0, it will look the same as PCC *except* any non-Cat serial numbers will be omitted from the list.

1. **Customer Advanced (Parts & Service) profile should have access to Injector Trim file per the Access Types list in the Appendix of the SIS 2.0 Administration Guide, but presently they don't. Will this be resolved soon?**

This is a known issue that is planned to be fixed in our next release**.**

1. **Can someone who has a PCC account be converted to have a CWS? Currently if a customer started with PCC then they can't be converted to a CWS, but if I as an Identity IQ admin create a CWS, then they can get PCC and it is much easier from CWS to PCC. Is there a way that we can make it available for PCC accounts to be moved to a CWS?**

*A PCC account is already a CWS account marked as an E-Customer. At this time, there is a conversion process to change the affiliation from E-Customer to Customer, making the account like an account created in IdentityIQ. An Identity IQ Admin can request this to the IAM team. If you do not have a contact, please send a request to* [*ebiz\_apps\_support@cat.com*](mailto:ebiz_apps_support@cat.com)*.*

1. **Is Chrome the recommended browser for SIS 2.0?**

*Yes, Google Chrome or Microsoft Edge Chromium are recommended for SIS 2.0.*

1. **Will SIS 2 work for users that have an e-commerce login that they created in PCC?**

Yes.

1. **Will PCC instant access users be granted the free version of SIS 2.0 automatically?**

*Users that create their account via PCC/PartStore, instant access users, will be granted Customer Basic – Parts Only access once auto registration is live with PCC*

1. **What happens if the customer login created thru DMT, are these granted SIS 2.0 access automatically and what access type?**

*Customer Users in Feb 2 load (users that had SIS Web accounts as of Jan 18) are slotted in SIS 2.0 access type based on the information types they have access to in SIS Web. Users added to monthly load after that will be added to SIS 2.0 with customer basic (parts only) access, if the dealer admin has not already created an account in SIS 2.0 for the user. Once auto-registration is available, instant access users will be added to SIS 2.0 with Customer Basic – parts only access by default. This can then be changed by a SIS Admin to any of the 4 customer access types available.*

1. **What if I only have a choice of "Customer Basic" when trying to change the access type from the drop down? I tried changing a user from Basic to Advanced and it didn't let me. Will this be fixed?**

*If there is a "." in the username, there is a known bug that will be fixed on Feb 2nd. That could be why you cannot change a user from basic to advanced. Additionally, If the User Type is E-customer is displayed before you select the Edit User icon, these users are also currently not able to be changed by a SIS Admin to anything other than Customer Basic. There is a planned fix for this by Feb 22. If you need one of these users added or modified to a higher access level prior to this date, reach out to your SIS 2.0 Service Innovation Consultant and they can further assist.*

1. **Will the dealer be able to create custom access like we can in the SIS Web admin?**

*No. There are standard access types in SIS 2.0. These replace customizable profiles that you had in SIS Web. There is not a way to modify these access types.*

1. **Where and how can we modify the Org Name/Company name?**

*This information is being pulled from Global Directory and is not editable in SIS 2.0.*

1. **Will there be a TEPS Profile?**

*Yes, there will be a TEPS access type. The TEPS contacts at your dealership should be receiving communications from the team handling TEPS migration and can work directly with them.*

1. **Will "As Shipped Product" on the configuration page of a machine in SIS 2.0 be functional for Standard Customer Parts & OMM? It is currently available for SIS Web standard users.**

*As Shipped is not part of the Customer Standard Parts and OMM access type. The breakdown of information types is shown in the SIS 2.0 Administration Guide linked above.*

1. **How can we see activity by users? Log-in metrics. How will the expected migration be measured by dealer?**

*Power BI can show you migration rates. Also, your SIS 2.0 Service Innovation consultant can provide additional dealer migration information with you if needed.*

1. **Will customers be able to see their equipment list after they go live and access their SIS2 through the link in PartStore?**

*They will not have equipment list at go live. We have development working on this and will be deployed in SIS 2.0 later this year*

1. **I see folks with admin rights who should not have admin rights, how do I change that?**

*Please email* [*ebiz\_apps\_support@cat.com*](mailto:ebiz_apps_support@cat.com) *for our team to further investigate and assist. For reference we are currently auditing all admin users if those users responded that they still need admin. We will need to work with you and them directly to manage access.*

1. **When I select the edit button my changes do not save?**

*Please send an email along with screen shot of this issue to* [*ebiz\_apps\_support@cat.com*](mailto:ebiz_apps_support@cat.com) *for further assistance.*

1. **So, in February the users can access SIS 2, or do we need to manually switch that on for them?**

*Customer users that had SIS Web accounts as of Dec 2 are loaded into SIS 2.0 and can access SIS 2.0 if they have the link. See #14 above for further details of when access is being added for newer customer users. To access via PCC or PartStore, dealers will need to make the switch into SIS 2.0 in DMT (available Feb 13).*

1. **We need a way to determine when the customer's subscription has expired. No way to note in SIS 2.0 admin portal currently - we use fields in SIS now to note expiration date.**

*This is not currently available. We have added it to our enhancement requests for SIS 2.0 Admin portal.*

1. **Is the Customer Advanced access type the customer "paid" SIS version and the standard is the free one?**

*It is up to each dealership on what level access/charge they provide customers. What each access type includes can be found in the appendix section of* [*SIS 2.0 Administration Guide \_Sharepoint*](https://urldefense.com/v3/__https:/caterpillar.sharepoint.com/:b:/r/teams/SIS2/Customer*20Migration*20Resources/SIS*202.0*20Administration/SIS*202.0*20SIS*20Administration*20Guide*20.pdf?csf=1&web=1&e=XtLbif__;JSUlJSUlJSUl!!FRLE-BHliQ!m7hvA4iHXQzqsX9ljOCAQN62cJqmaoZypmzOvg51mkPPf61x_IzC_lAMbScvAbaxNg$)

1. **Can you explain the difference between Customer access Standard and customer advanced? what access should it be granted to customer as a default?**

*By default, new instant access customer users will be placed in the Customer Basic – Parts Only access type. To see the difference in access types, reference the appendix section of* [*SIS 2.0 Administration Guide \_Sharepoint*](https://urldefense.com/v3/__https:/caterpillar.sharepoint.com/:b:/r/teams/SIS2/Customer*20Migration*20Resources/SIS*202.0*20Administration/SIS*202.0*20SIS*20Administration*20Guide*20.pdf?csf=1&web=1&e=XtLbif__;JSUlJSUlJSUl!!FRLE-BHliQ!m7hvA4iHXQzqsX9ljOCAQN62cJqmaoZypmzOvg51mkPPf61x_IzC_lAMbScvAbaxNg$)

1. **Will there be a link in the DMT to SIS2?**
2. **What impact does the User type have on the user’s access or is it just for information?**

*User type is based on affiliation in Global Directory. This presets the allowable access types that can be selected for that user.*

1. **Do the users in SIS 2 admin site that I see now, all have access to SIS 2? I thought the dealerships were deciding when to grant access to the customers to access SIS 2.**

*All users with active box checked in SIS 2.0 admin portal can access the site. Caterpillar has not shared the link with customers. It is up to dealers to communicate, train, share link with their customers.*

1. **According to the chart in the back of the SIS admin guide all customer levels will have access to NPR. Is this TRUE?**

*Yes, all users have NPR access in SIS 2.0.*

1. **Regarding NPR for customers - do we still need a signed confidentiality agreement now for all these customers?**

*We are still working to answer this question. This will be shared with the Customer Migration Team at your dealership once resolved.*

1. ***Can we restrict access type profile like Service Magazine and Engines News?***

*In SIS 2.0 there are standard profiles and the information types cannot be customized. Details on which information types are included in each profile are in the SIS 2.0 Administration Guide. There are 4 profiles permitted for customer users. You can grant Customer Standard (Parts & OMM) or Customer Basic (Parts Only) if you do not wish to grant full Customer Parts & Service.*

1. **Would there be a set time and days the monthly update happens?**

We are still working with development on the set schedule for the monthly update. The next data load to cover the remaining of the existing SIS Web customer users (anyone added between Dec. 2 and Jan. 18) will be live the first week of Feb.

1. **What kind of control does the organization code have? Does it affect the use of the system?**

*Org. code does not impact the system and is for informational and sorting purposes only. Only the User Type (Primary Dealer, E-Customer, etc.) impacts the access types that may be assigned.*

1. **Is there a list what information type is included in the individual access types?**

*Yes, information types for each access type (profile) are listed in the appendix section of the SIS 2.0 Administration Guide.*

1. **I can only select Customer Basic in E-Customer. Will it be added later?**

*Yes, that is a change that will be released by Feb. 22. If you need to change access for a user prior, please contact your Customer Migration contact or Service Innovation Consultant.*

1. **I take it the Last Modified is when we update the account. Will we have a last logged in or used date to help identify accounts that are no longer used and can be deleted?**

*We have added this to our enhancement requests.*

1. **What will be the first date we can grant customers for SIS 2.0?**

*If a customer user is visible in your SIS 2.0 Admin portal, then s/he already has access per the Access Type listed for the user id. Dealers may choose to notify their customers at any time.*

1. **What's meaning of a status code 403 error when trying to access SIS 2com/admin?**

*Please email* [*ebiz\_apps\_support@cat.com*](mailto:ebiz_apps_support@cat.com) *for errors or to request admin access.*