WEBTRIEVE™ User Guide

ALS Tribology

Table of Contents

1 Overview 3

1.1 Purpose 3

1.2 System Requirements 3

1.3 Logging In 3

1.4 Password Reset 4

1.5 Welcome Screen 4

1.5.1 News and Tech Info 4

1.5.2 Contact Us 4

2 Dashboard 5

2.1 Customizing Widgets 6

2.2 Adding a New Widget 8

3 Administration 9

3.1 Configuration Settings 9

3.2 Samples 9

3.3 Special Options 10

3.3.1 System 10

3.3.2 Knowledge Base 10

4 Search 10

4.1 Saving a Search 11

4.2 Viewing Results 11

4.3 Tagging 11

4.4 Filtering & Sorting Result Lists 12

4.5 Further Actions 13

4.6 Sample Details 13

4.7 Test Information 14

4.8 Further Actions 14

4.9 Feedback 14

5 Samples 15

5.1 New Samples 15

5.2 Diagnosed within 7 Days 15

5.3 Unreleased Samples 15
5.4 Sample Submission 15
5.5 Performing Submissions 16
5.6 Sample Submission List 17
5.6.1 Sample Status 17
6 Equipment 17
6.1 Companies 17
6.2 Units 18
6.3 Compartments 19
7 Maintenance 20
7.1 Log Fluid Top Up 20
7.2 Fluid Top-Up History 21
7.3 Bulk Fluid Update 22
8 My Account 22
8.1 Change My Password 22
8.2 Update My Details 22

1 Overview

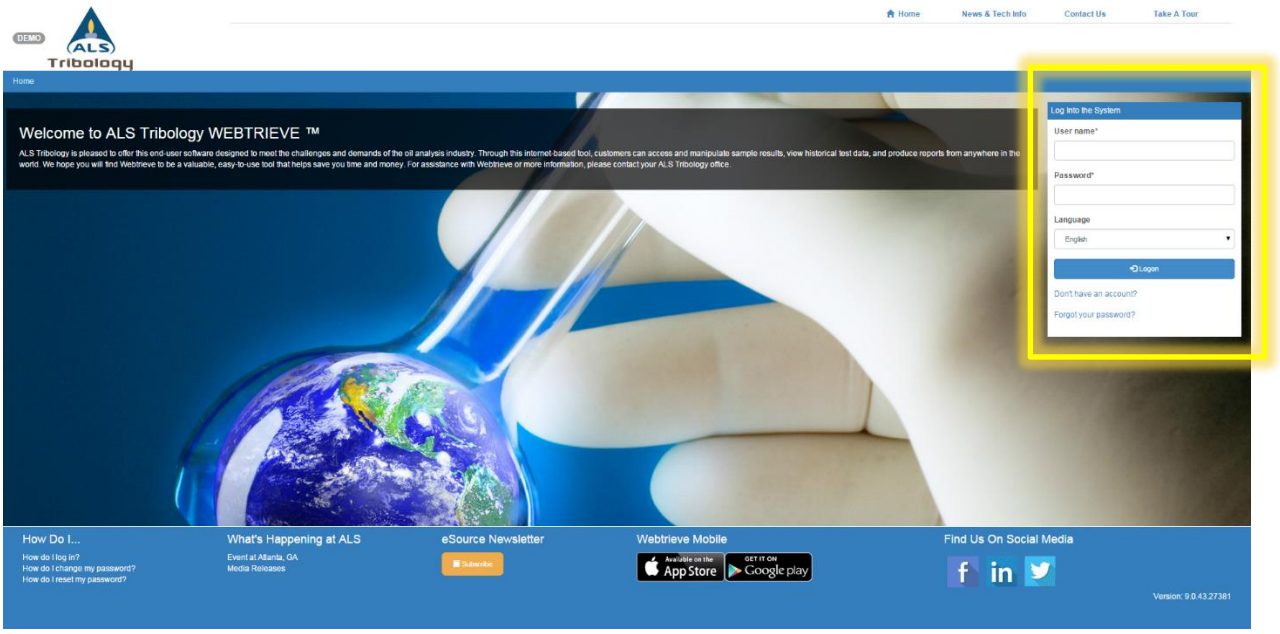
1.1 Purpose

This document covers general information about the ALS Tribology Webtrieve™ system.

1.2 System Requirements

Category	Description	Minimum	Recommended
Hardware	CPU	1 Gigahertz (GHz) 32-bit (x86) or 64-bit (x64) processor	Dual Core 1.6GHz or faster
	RAM	512 MB	1 GB or higher
Operating Systems	Windows	Windows Vista 32-bit with Service Pack 2 (SP2) or higher	Microsoft Windows 7 or higher
Screen Resolution	Screen Resolution	1024 x 768	1680 x 1050 or higher
Compatible Browsers	Microsoft Internet Explorer	Version 9	Version 11 or higher
	Google Chrome*	HTML5-compliant versions	HTML5-compliant versions
Browser Settings	Cookies	Enabled	Enabled
	JavaScript	Enabled	Enabled

1.3 Logging In



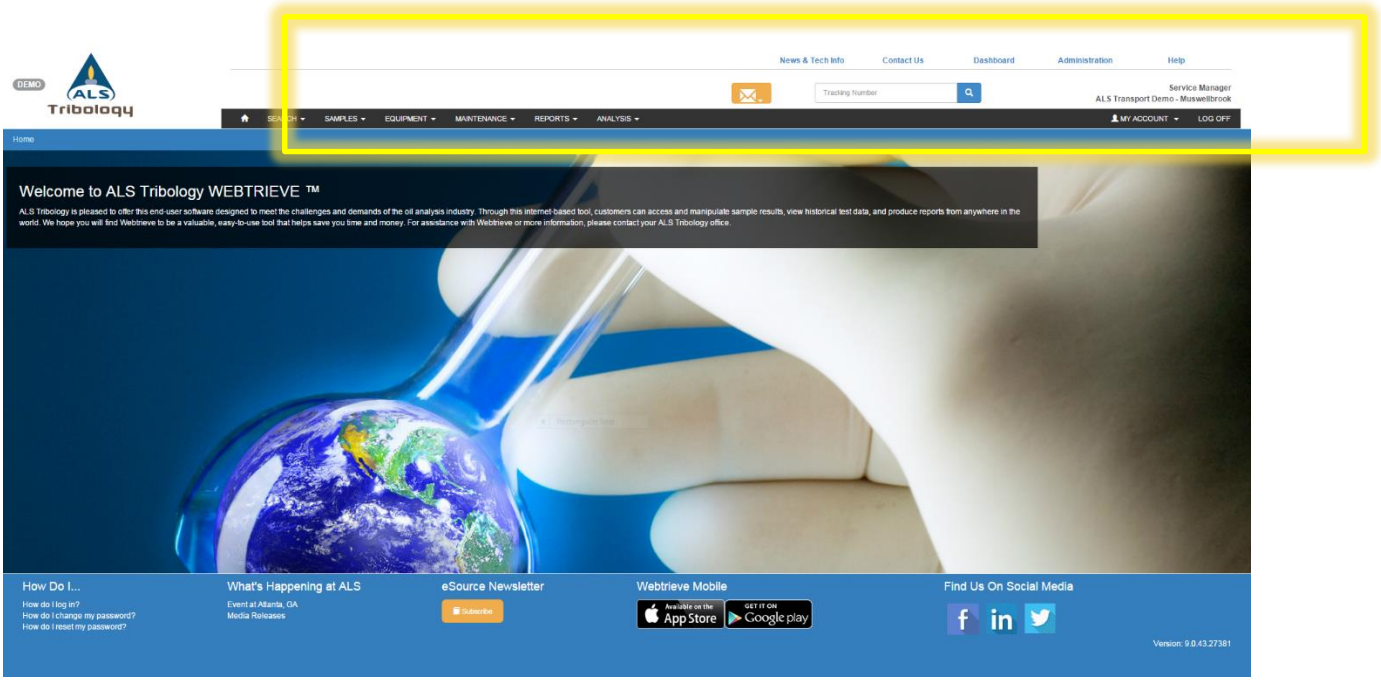
To first access the website, existing users may log in with their user ID and Password. New users may create an account by clicking 'Don't have an account?'

1.4 Password Reset

To reset your password click on the 'Forgot your password' option. You will be prompted to provide additional information. You will then receive an email with instructions to reset your password.

1.5 Welcome Screen

Once you have logged in, your welcome screen will appear. You will see a menu bar across the top of the page with a number of user options available.



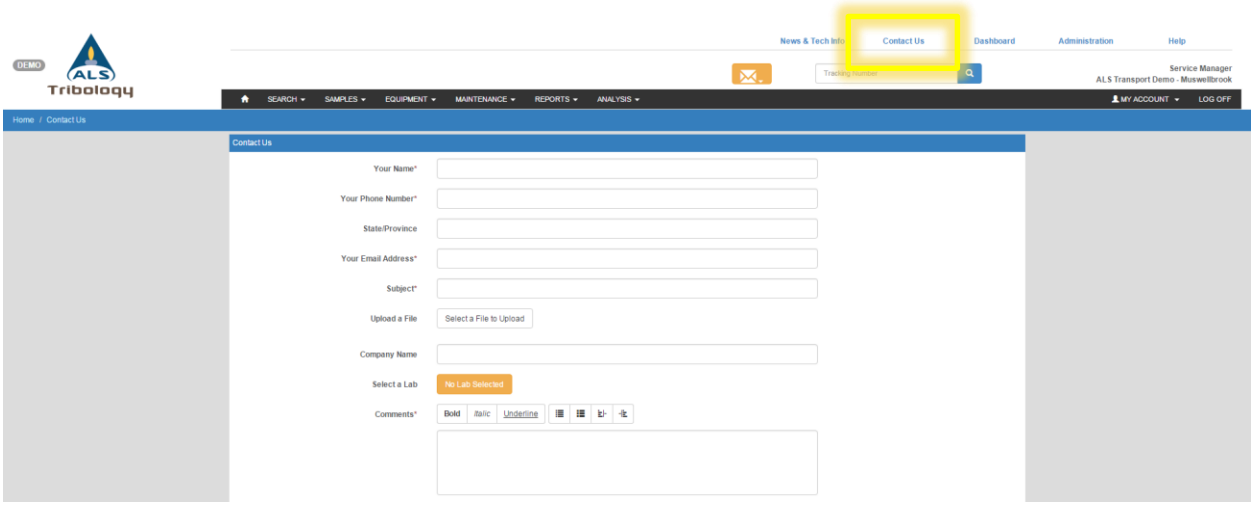
1.5.1 News and Tech Info

Webtrieve™ offers a 'News and Tech Info' section for technical articles relating to oil analysis specifically and reliability in general as well as information concerning Webtrieve™ functionality and upgrades.

In addition to news and technical information, notifications regarding website updates or system outages will appear in the bright orange colored envelopes under the top menu bar.

1.5.2 Contact Us

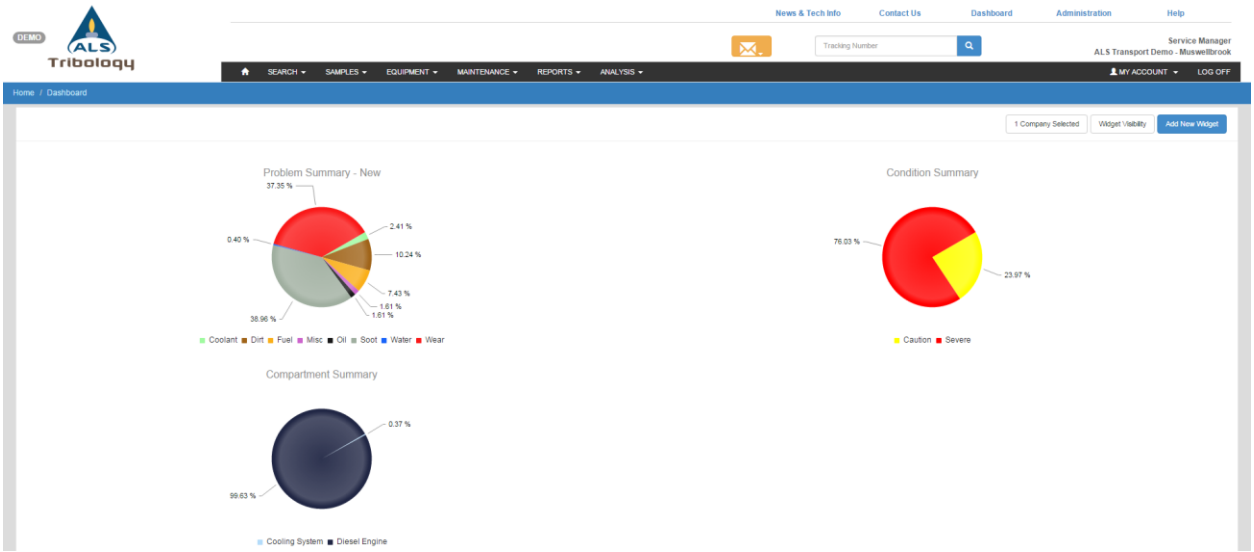
The 'Contact Us' option is available on the top menu bar for users wishing to contact ALS Tribology with questions, ideas or concerns. After selecting this option, the following screen appears.



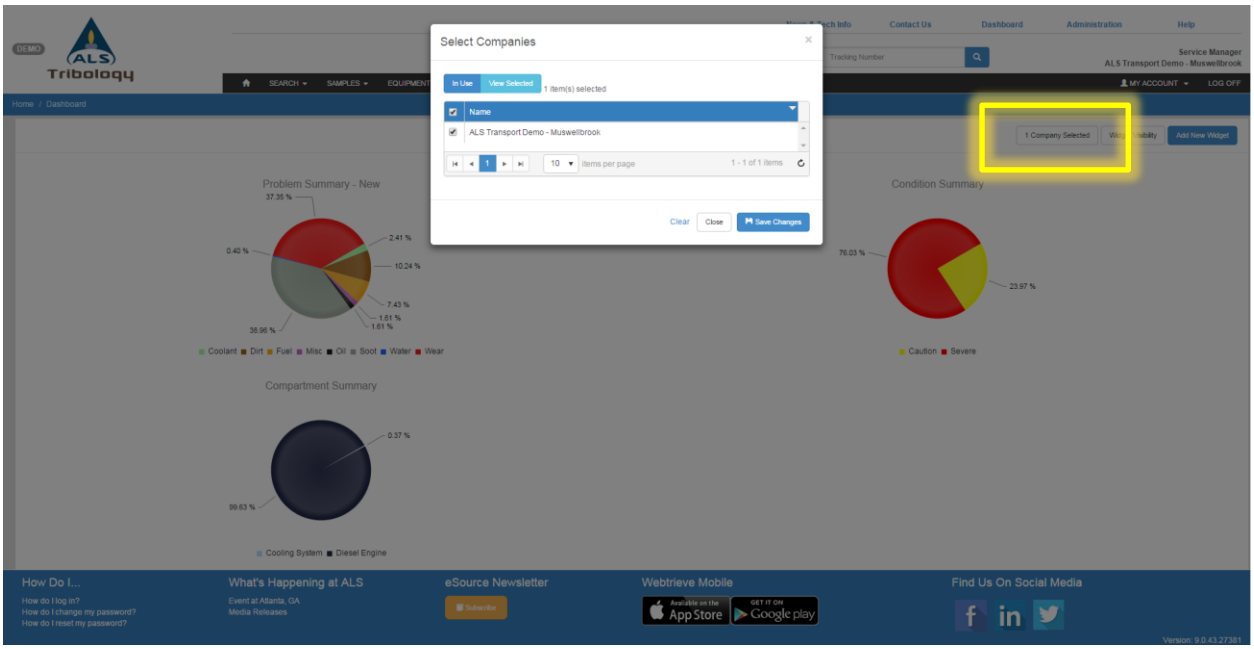
2 Dashboard

The dashboard can be configured as your home page. The dashboard displays a set of customizable widgets that can be used to view or compare data. Widgets can be customized by three different types:

1. **Problem Summary** summarizes the source of concern. Examples include wear metals, coolant, fuel dilution, oil condition, etc...
2. **Condition Summary** identifies the overall health and wellbeing of the equipment. This is provided in a percentage of normal results for situations that are considered cautionary, abnormal or severe.
3. **Compartment Summary** compares various components within your equipment such as bearings, gearboxes, engines, hydraulics, etc.

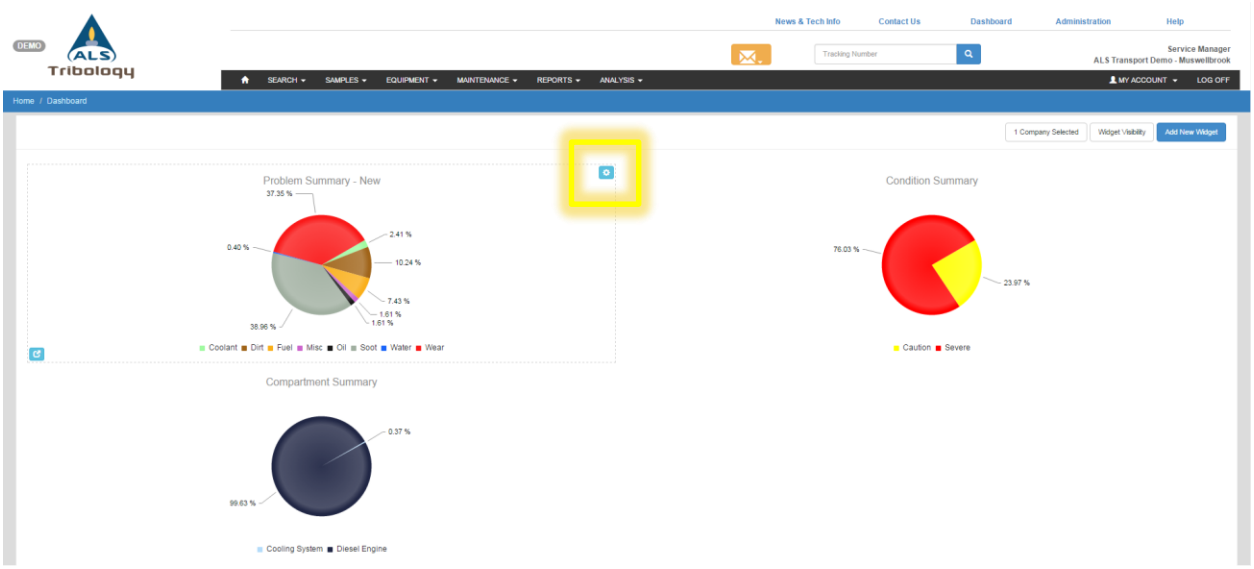


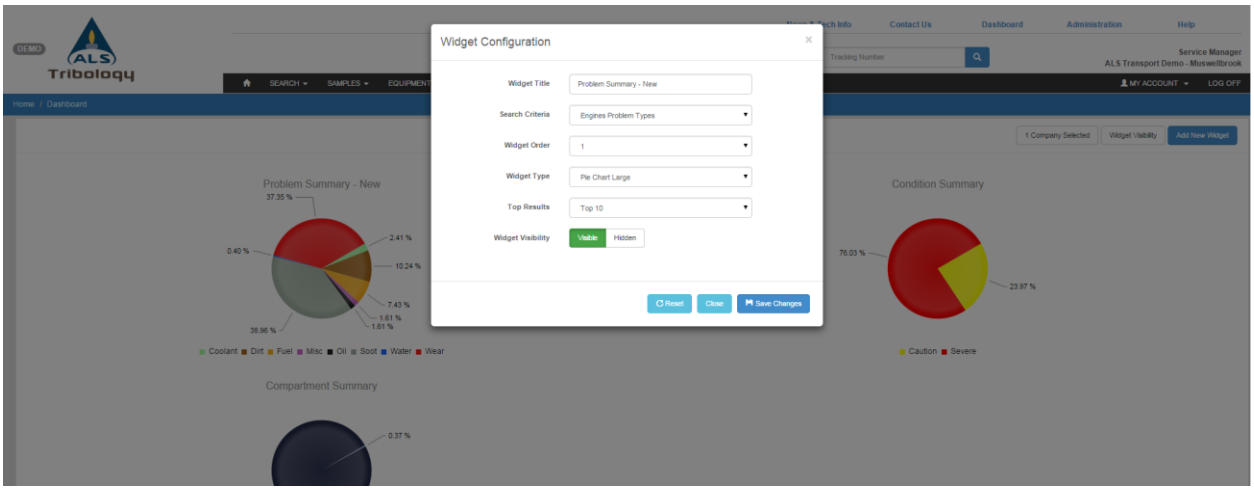
Users with more than one company or location may select the company or location of interest to display on their Dashboard.



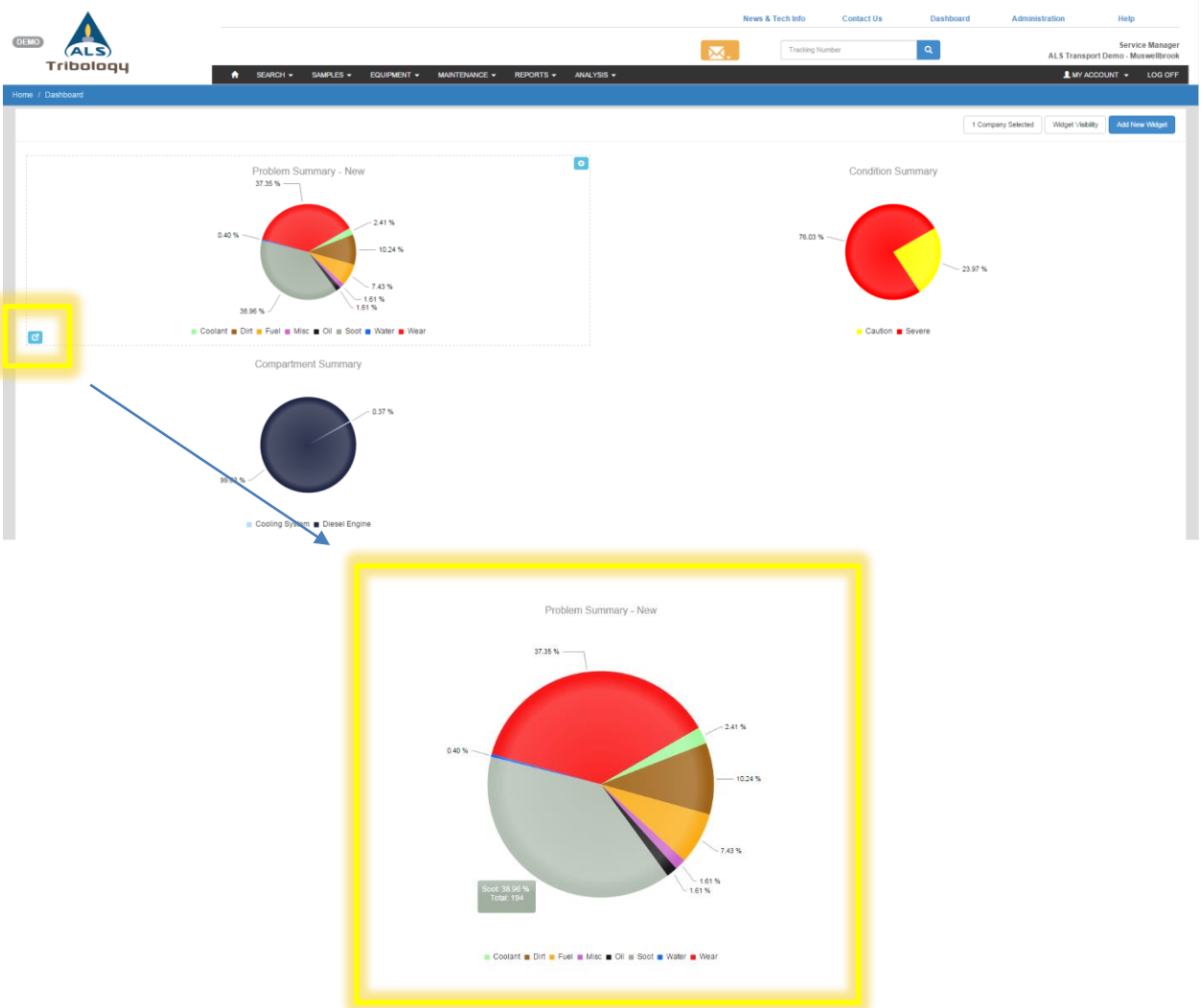
2.1 Customizing Widgets

You may hide or display widgets according to your viewing interests. To customize the results displayed select the 'Widget Visibility' option. Each widget comes with its own set of tools and configuration options, as shown in the figure below:





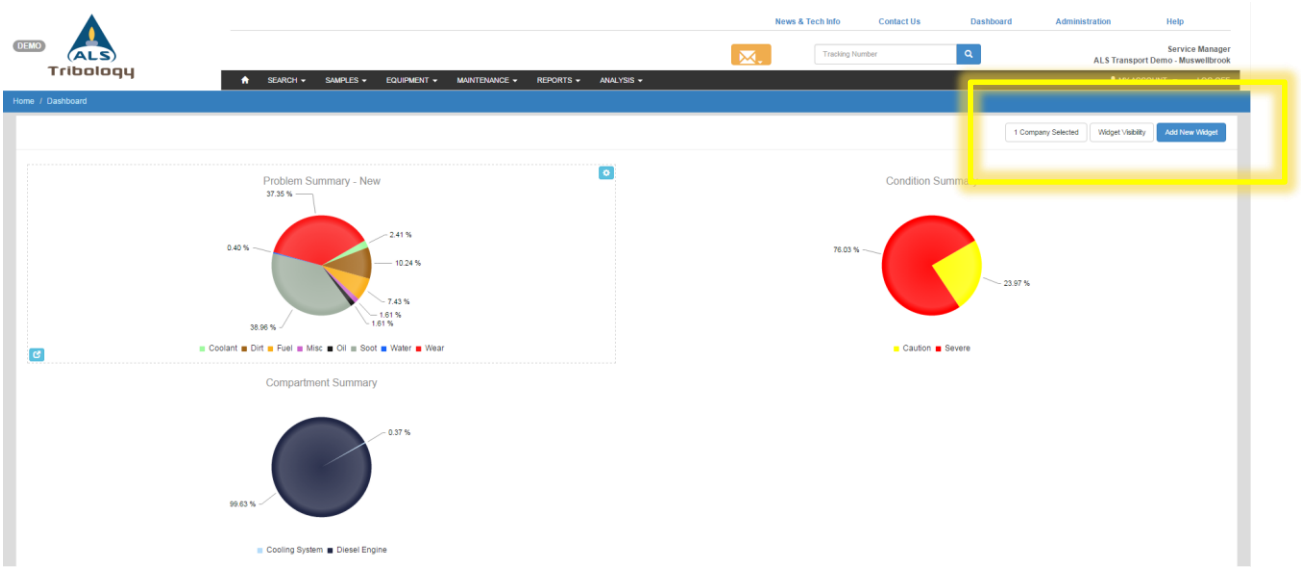
You may also view the widget in full screen as shown in the figure below:

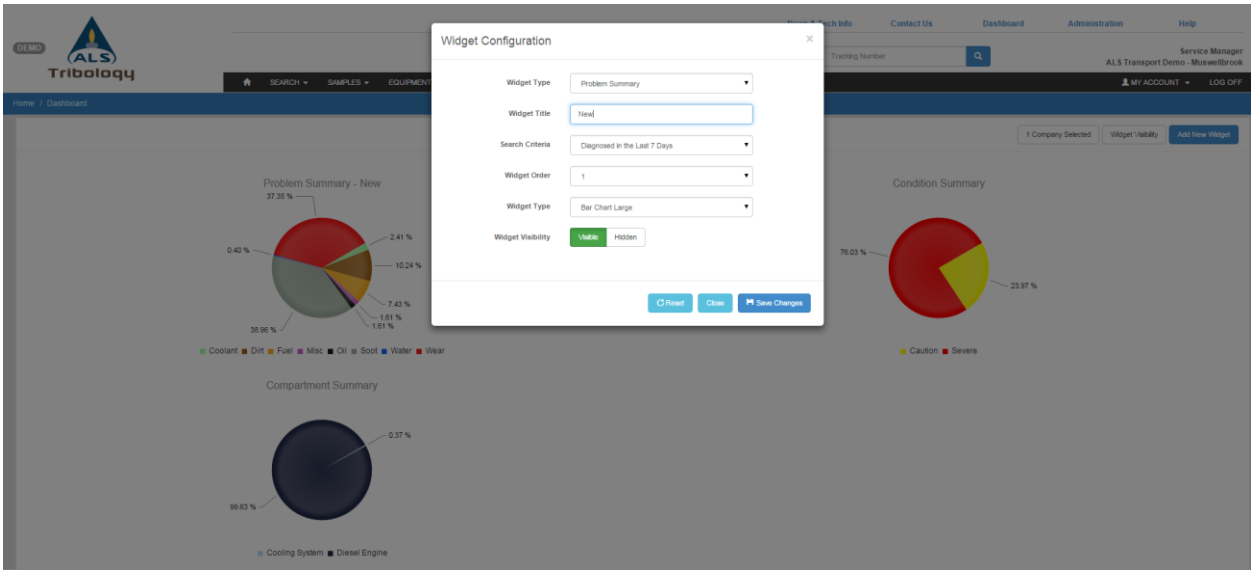


2.2 Adding a New Widget

To add a new widget select the "Add New Widget' option. The widget configuration tool for adding a new Widget will appear prompting users to:

- Add a widget title
- Select existing search criteria
  - Users can select from existing searches or create a new search on the Search page prior to adding a new widget
- Select the order for the widget to appear on dashboard
- Select widget type (bar or pie chart)
- Select top results (Top 5, Top 10 or All)
- Select the widget visibility





Click 'Save Changes' to add the widget on dashboard. Please note: if no data is available, the widget will appear blank on the dashboard.

3 Administration

The administration tab will maintain your configuration settings used throughout the site. Some settings are hidden/visible to users depending upon their role.

3.1 Configuration Settings

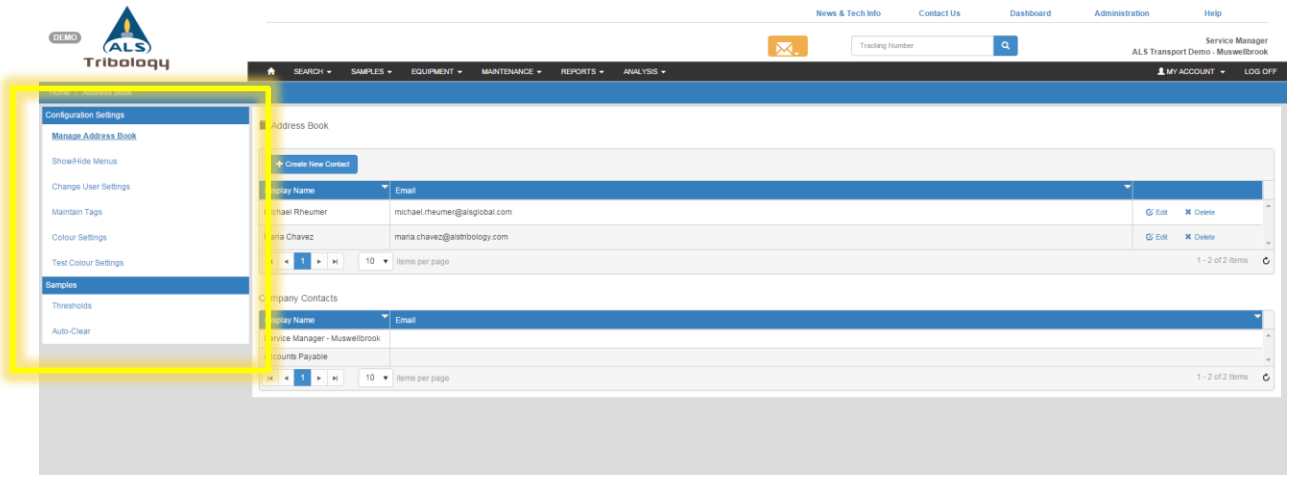
The Configuration Settings enables you to manage settings for the following options:

- Manage address book
  - Add, edit or delete a contact from the Address Book and Company Contacts list.
- Show/Hide menus
  - Hide/display menu items such as Search, Samples, Equipment, etc. by updating settings on this page.
- Change user settings
  - Change the default start page and/or change the default date range (e.g. Last 7 Days) criteria that appears on Search page.
- Maintain tags
  - View, edit or delete search tags created.
- Colour settings
  - Customize colour settings for Data Types (e.g. Company, Unit, and Compartment etc.), Severity Ratings (e.g. Normal, Severe, and Abnormal etc.) and Problem Codes (e.g. Chlorides, Fuel, Debris etc.)
- Test colour settings
  - Customize colour settings for different test packages (e.g. FTIR, ICP etc.)

3.2 Samples

The 'Samples' settings enables you to manage following:

- Thresholds
  - Threshold values are entered by users to set the threshold on usage of their equipment, they are used to display warnings of any inconsistencies (equipment is used for more than threshold value) that occur at sample submission. If the threshold value is empty, the user will not receive any message/warning during sample submission.
- Auto-Clear
  - Auto-Clear settings are available for each severity and allow users to configure when Samples appear in the New Samples List.
    - If the user selects the 'Yes' option under auto-clear, the samples will be cleared from the new sample list after the specific 'No. of Days' entered by the user. Please note: if the number of days entered is '0', the samples of that particular type will not appear in the user's new sample list.
    - If the user selects the 'No' option under auto-clear, the samples will be cleared from the new sample list only after the user views them.



3.3 Special Options

3.3.1 System

This page will be visible only to the system administrator. The system option allows the system administrator to add a new user, edit an existing user, reset a user's password and activate/deactivate a user's account.

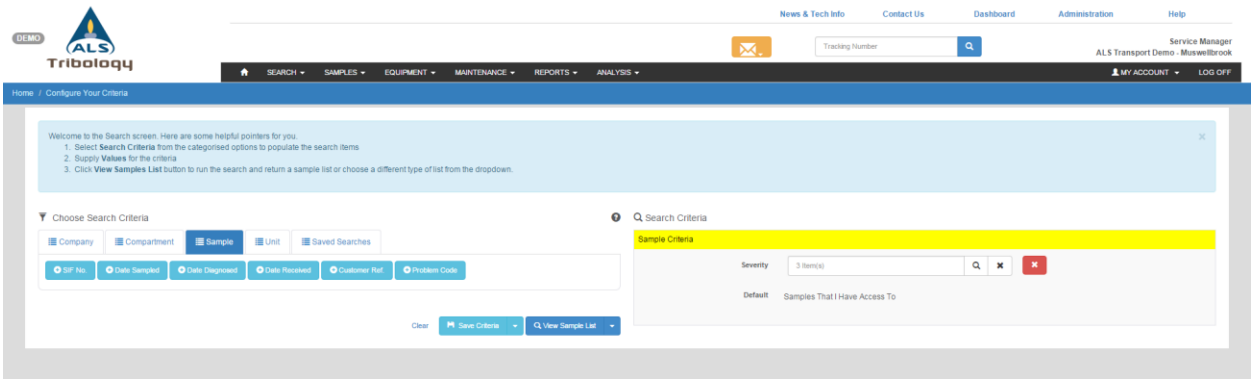
3.3.2 Knowledge Base

This page will be visible only to the knowledge base administrator. The knowledge base option allows the knowledge base administrator to add news articles/categories, update/delete articles, activate/deactivate articles and send system messages to all users.

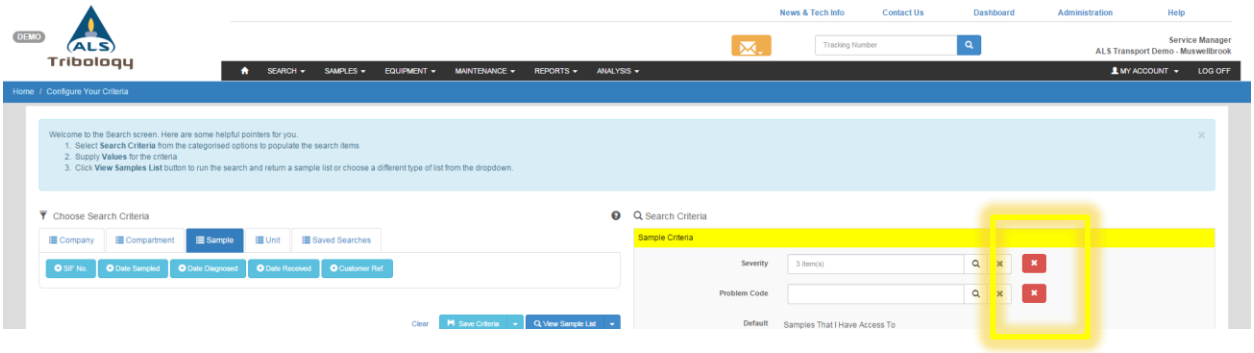
4 Search

The Search page is divided into two sections, Choose Search Criteria and Search Criteria.

Select items from the 'Choose Search Criteria' to be added to the 'Search Criteria' section of the page as shown in the figure below:



Items can be removed from the search criteria by clicking on the red (x) icons.

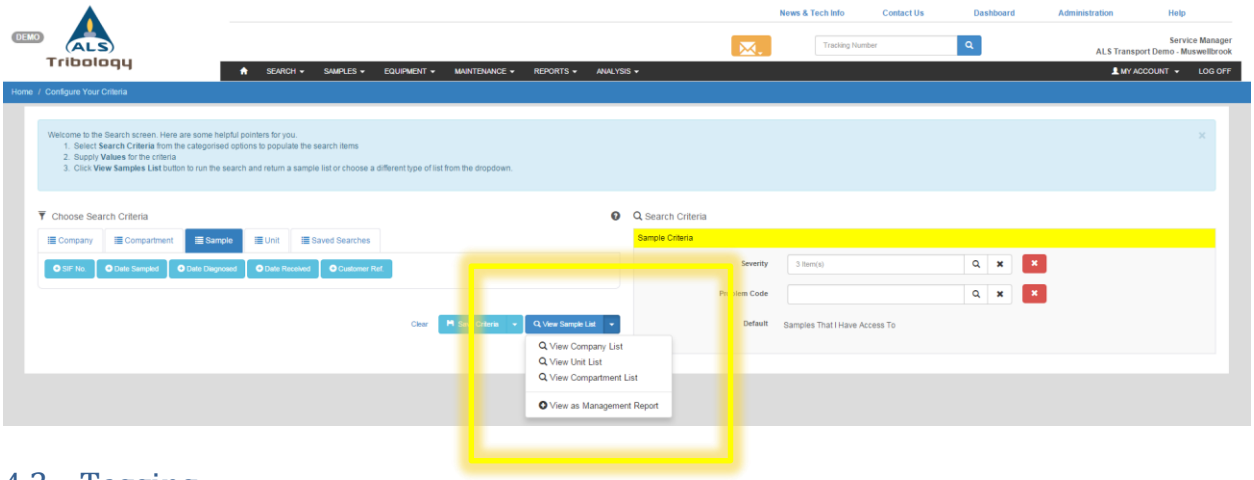


4.1 Saving a Search

Click on the 'Save Criteria' button to save your search. Saved searches can be renamed, deleted and accessed under the 'My Saved Searches' option in the search dropdown menu.

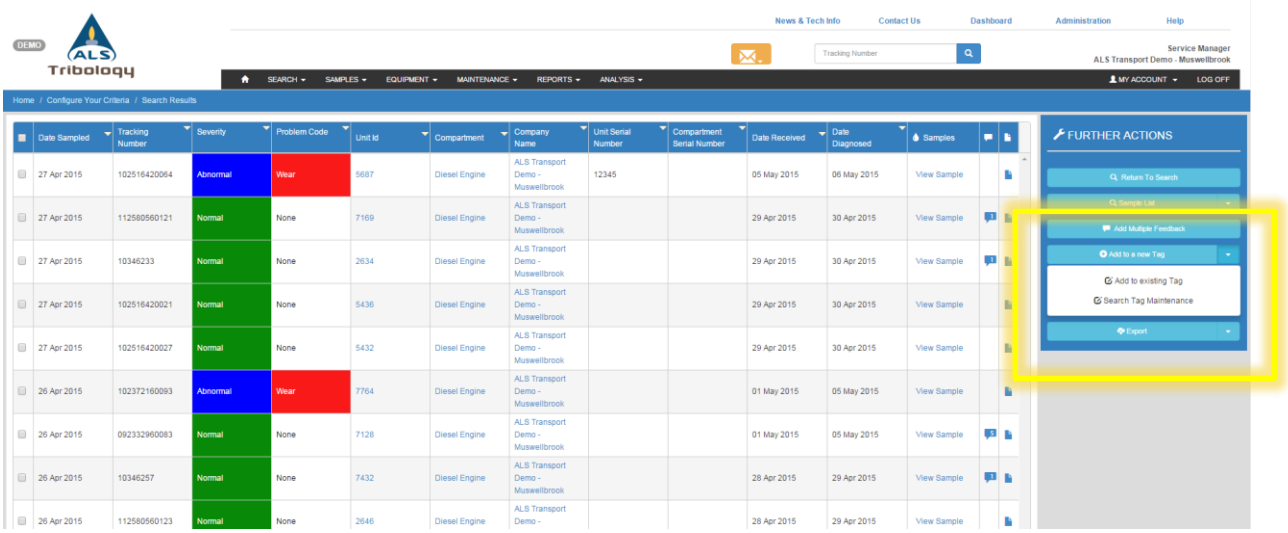
4.2 Viewing Results

Sample search results can be viewed as a sample list or (if selected from the dropdown menu) as a company list, unit list, compartment list or management report. A typical result list appears as shown in the figure below.



4.3 Tagging

For more flexibility, users can group results into customizable tags. Tags allow you to mark any samples, equipment or companies with an identifying name of your choice. The tagged items can be viewed as a list in 'My Tagged Items' under the search dropdown menu. Click on the 'Add to a new Tag' button to add an item to a tag. Alternatively, by clicking on the dropdown arrow, you can add that item to an existing tag. This is illustrated in the figure below.

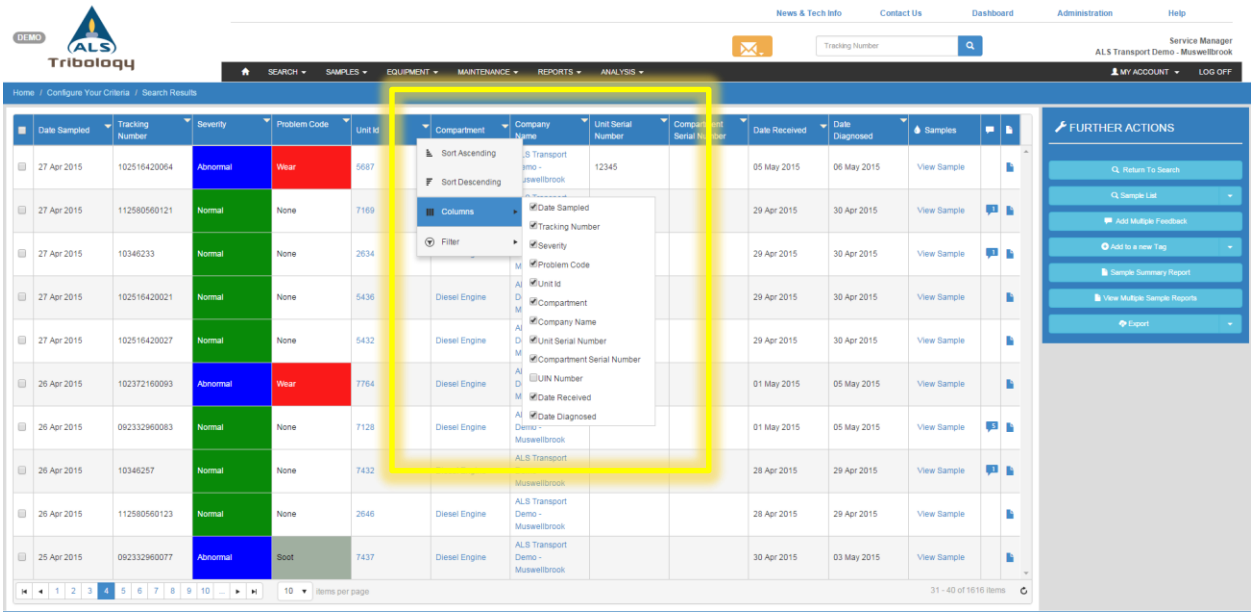


When selecting the 'Search Tag Maintenance' option, you will be directed to the 'Maintain Tags' page under configuration settings in administration where actions can be performed on an existing tag.

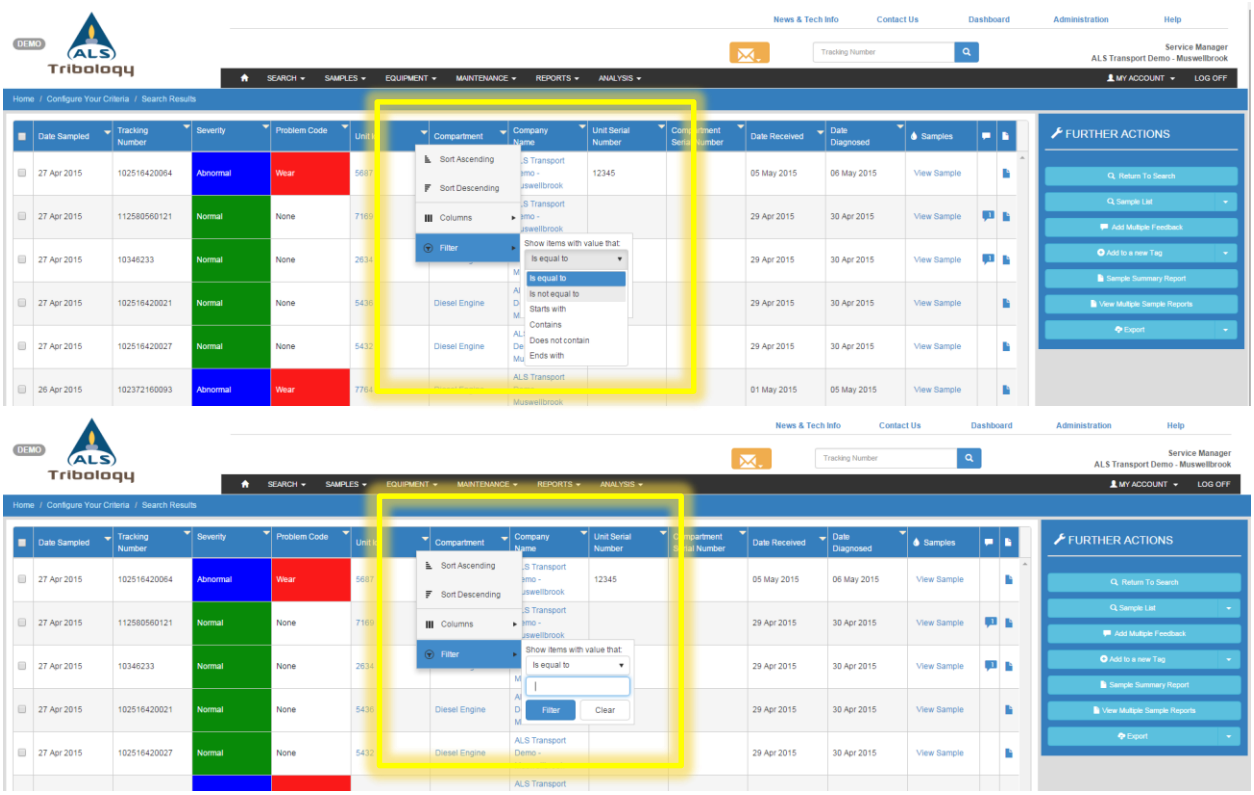
4.4 Filtering & Sorting Result Lists

All fields that can be sorted or filtered in a result list will bear a sort (small triangle) icon. After clicking the sort icon, a menu will appear on screen with the following options:

- Sort ascending & sort descending allows users to change the order of column items.
- Columns can be added or removed by selecting or de-selecting the column title in the columns submenu.



- Narrow down your results by using the Filter submenu. To filter results, select a parameter, type in your criteria and click on the 'Filter' button. To remove a filter, simply click on the 'Clear' button.

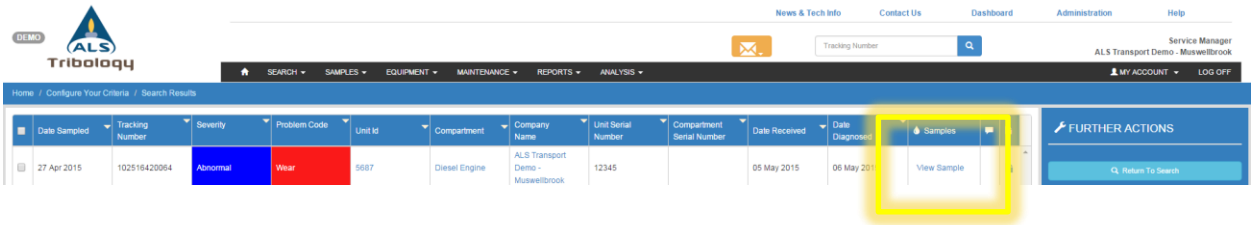


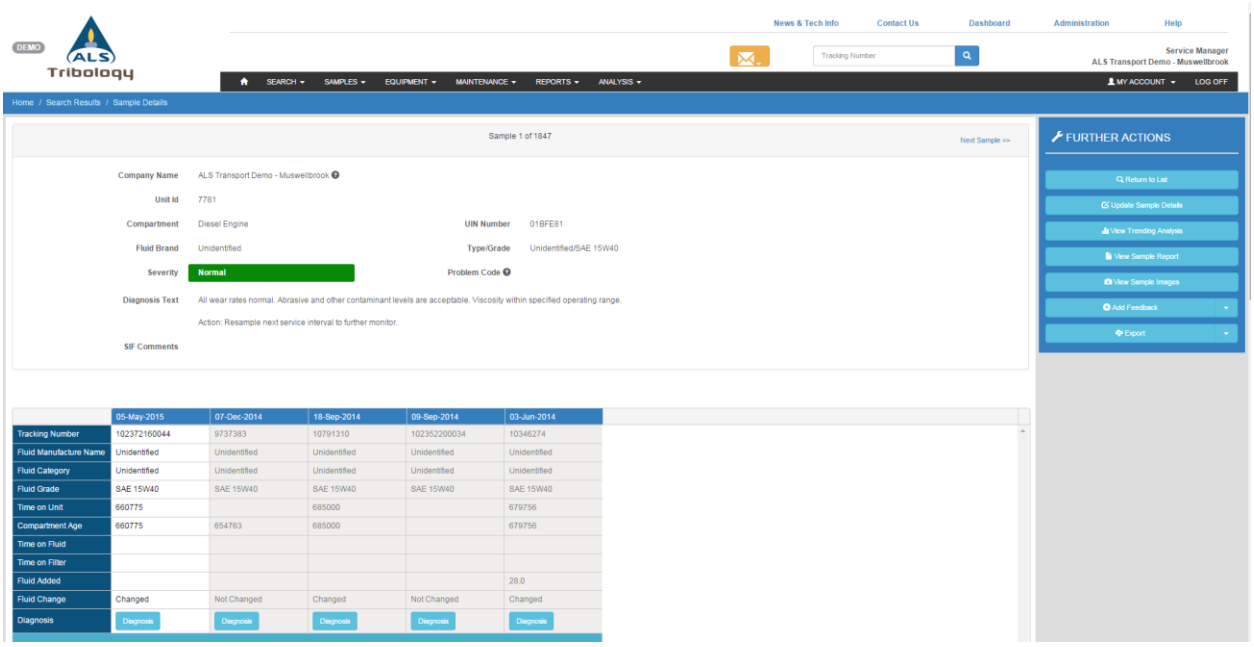
4.5 Further Actions

Each page has a further actions tab with a different set of controls.

4.6 Sample Details

The sample details page provides a detailed description of sample results/analysis and can be accessed by clicking the 'View Sample' hyperlink in a result list.





4.7 Test Information

Test information displays the test results by color per their severity ratings. To customize the colors of your severity ratings see administration.

4.8 Further Actions

The following options can be found under the further actions menu on the right hand side of the page.

- Return to list
- View latest sample
- Modify diagnosis text
- Update sample details
- Release sample (only in few cases)
- View trending analysis
- View sample report
- View sample images
- Add feedback
- Add return on investment
    - Available only to the fleet administrator, this feature allows users to keep track of the ROI achieved for preventative maintenance of equipment.
- Export

4.9 Feedback

Feedback can be viewed by clicking the 'View Feedback' icon (speech bubble) in a result list. Alternatively, feedback can also be accessed via the 'Feedback History' option in the search menu.

Please note: the view feedback icon will appear only when feedback is present in the system.

To add feedback to a result list item(s), make your selection by checking the checkbox to the left of the item and click the 'Add Multiple Feedback' button under the further actions menu.

5 Samples

The Samples menu allows users to focus on sample related information and maintenance.

5.1 New Samples

The new samples list displays all unviewed diagnosed samples. Once samples have been viewed, the system will flag the sample as delivered and will no longer appear in the new samples list. Please note: this also applies to the mobile application.

To configure the new samples list go to sample settings administration.

5.2 Diagnosed within 7 Days

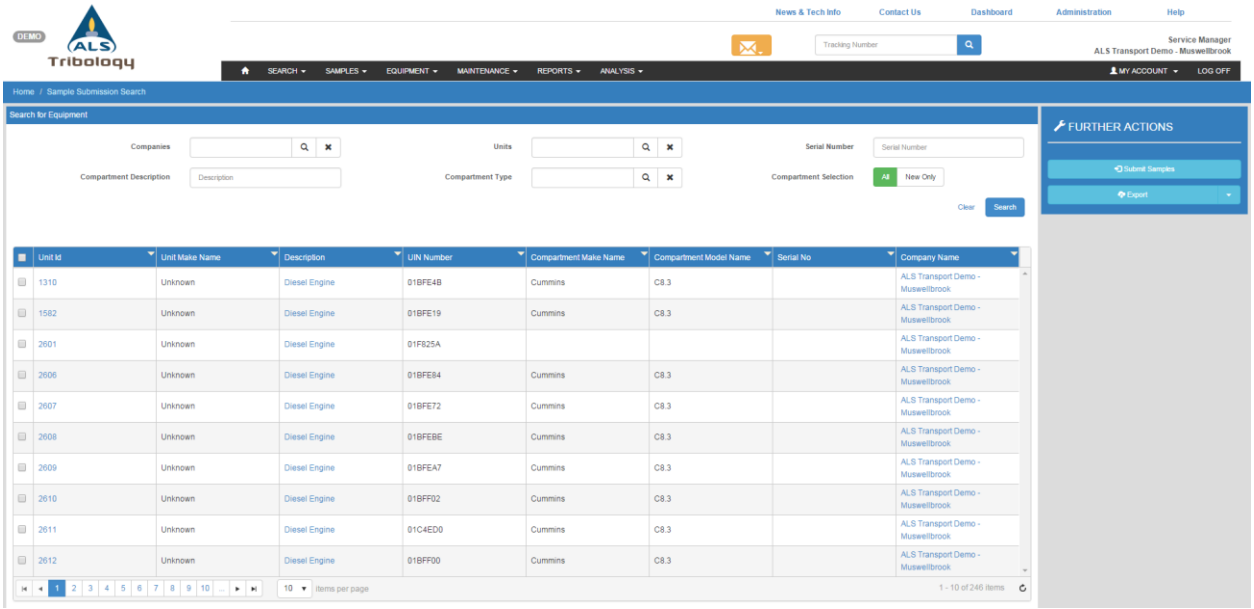
These are all the samples (both viewed and unviewed) that have been diagnosed within the last 7 days.

5.3 Unreleased Samples

This is available only if you release a sample online or perform online diagnosis.

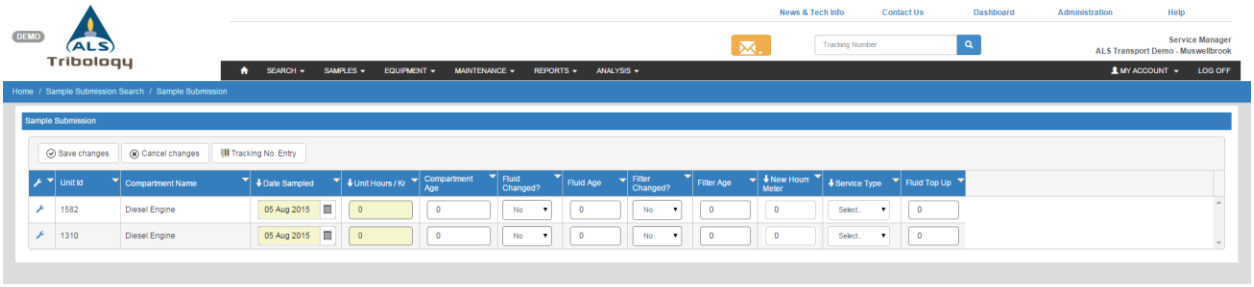
5.4 Sample Submission

This allows you to create an online sample submission that captures equipment and sampling information essential for proper identification. After clicking sample submission on the samples dropdown menu a sample submission search screen will appear. The user can then search/identify the equipment to be submitted by company, units, serial no., compartment description and compartment type as well as compartment selection.

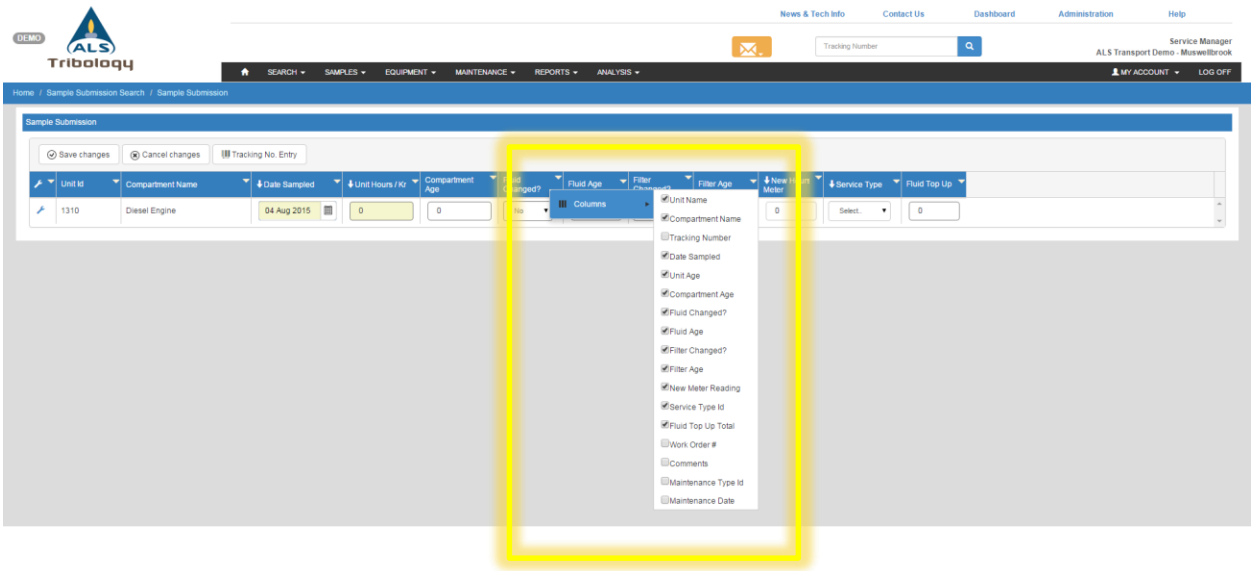


5.5 Performing Submissions

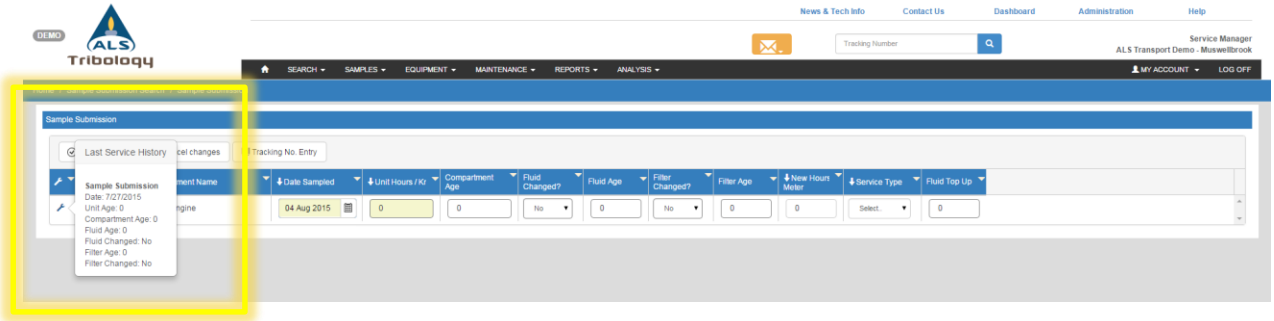
After selecting the equipment to be submitted, the following screen appears.



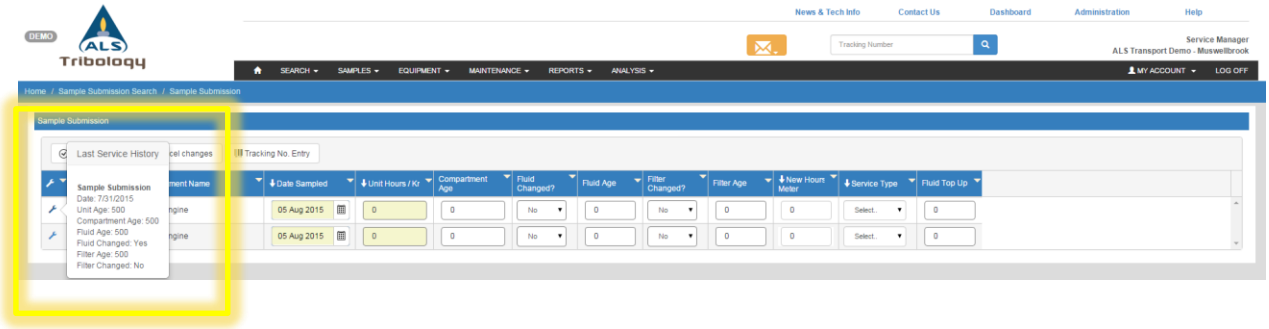
Columns can be added or removed from the page as per user's requirement.



Values entered in column can be propagated to other columns by using white arrow icon.



The service history of the equipment can also be viewed by clicking the spanner icon.



5.6 Sample Submission List

The sample submission list allows you to manage/review all online submissions from creation to when samples reach the laboratory. Submission types available are as follows:

- Unprinted Submissions
  - All online submissions that have not been printed will appear in this list. Unprinted Submissions can only be edited or deleted by the user who created them.
- Deleted Submissions
  - Deleted submissions will appear in this list. To undelete a submission click on the 'Undo Delete' button under the further actions menu. This action can only be performed by the user who initially created and deleted the submissions.
- Outstanding Submissions – Not Received
  - Sample submissions that have been printed but have yet to be received by the lab will display in this list. This usually represents samples that are in transit.
- Outstanding Submissions – Received By Lab
  - Submissions that have been received by the lab that are currently being processed will display in this list. Once submissions have been processed and diagnosed they will be removed from this list; as a result this list view is often empty.

5.6.1 Sample Status

Sample status is a pre-defined system search that displays undiagnosed samples and their current status.

6 Equipment

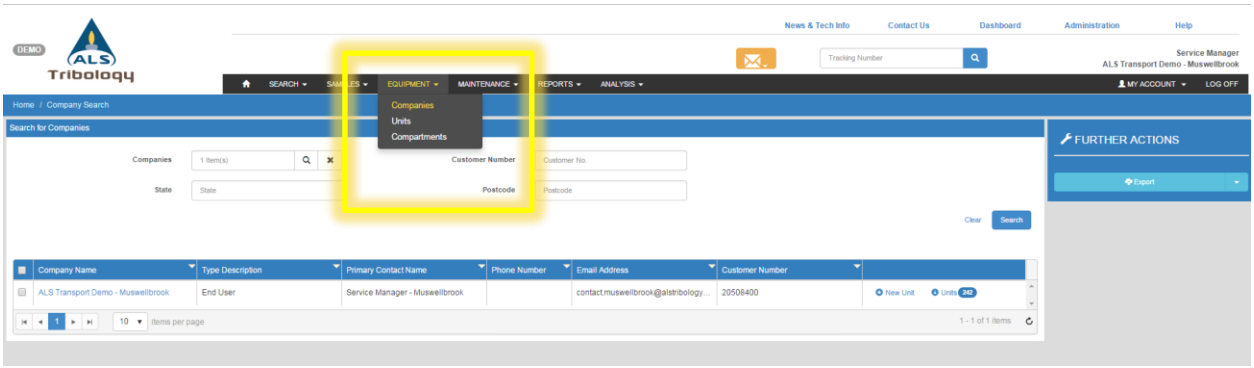
The equipment menu contains the following options related to the performance and maintenance of your equipment.

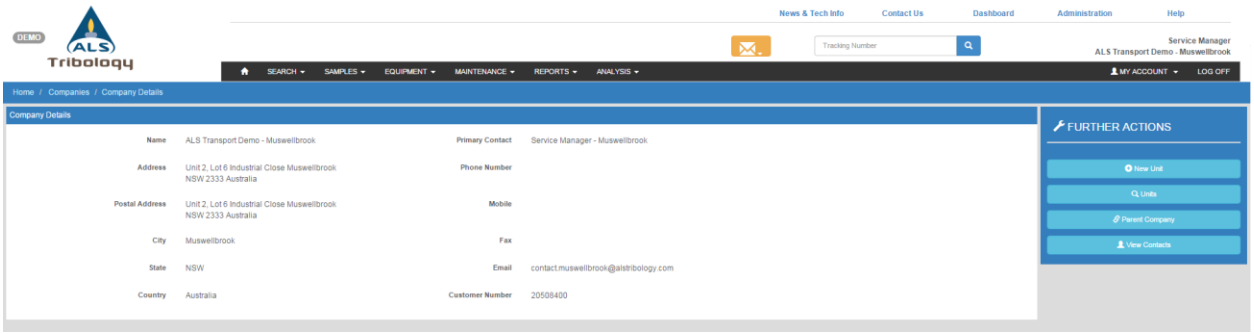
6.1 Companies

Some basic operations that can be performed under companies are:

- Search for companies
- View company details

- Add a new unit
  - To add a new unit click on the “New Unit” hyperlink. This option is available only to the Equipment Administrator.
- View existing units
  - To view details of available units click on the ‘Units’ hyperlink.

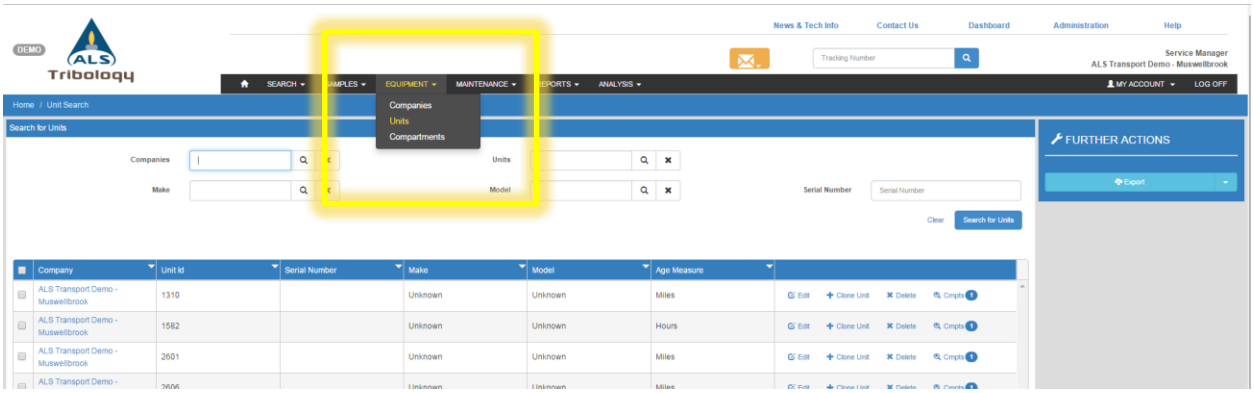


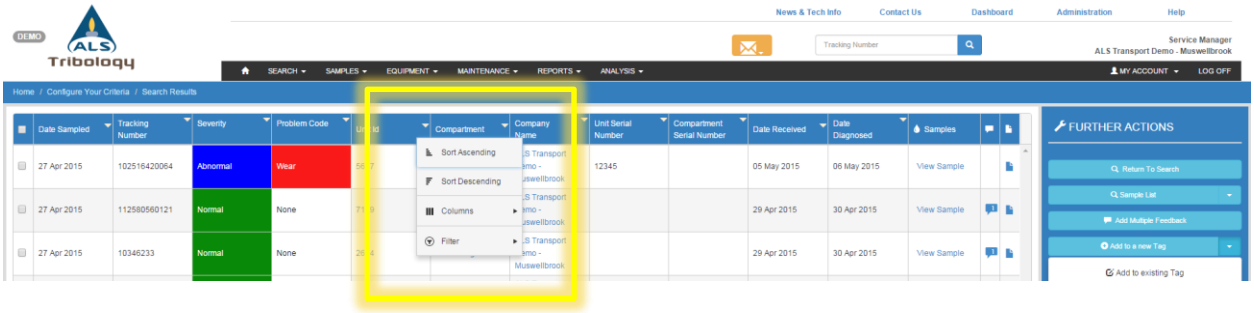


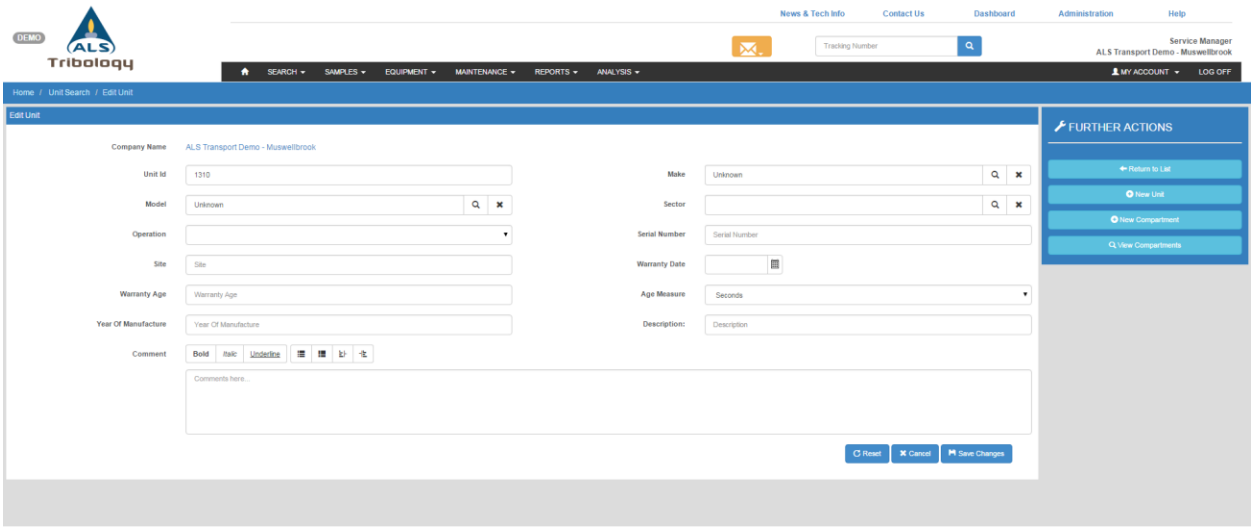
6.2 Units

Some basic operations that can be performed under Units are:

- Search for units
- View unit details
- View compartments associated with those units
- Clone an existing unit and edit/delete a unit. Please note: this option can only be performed by the Equipment Administrator.



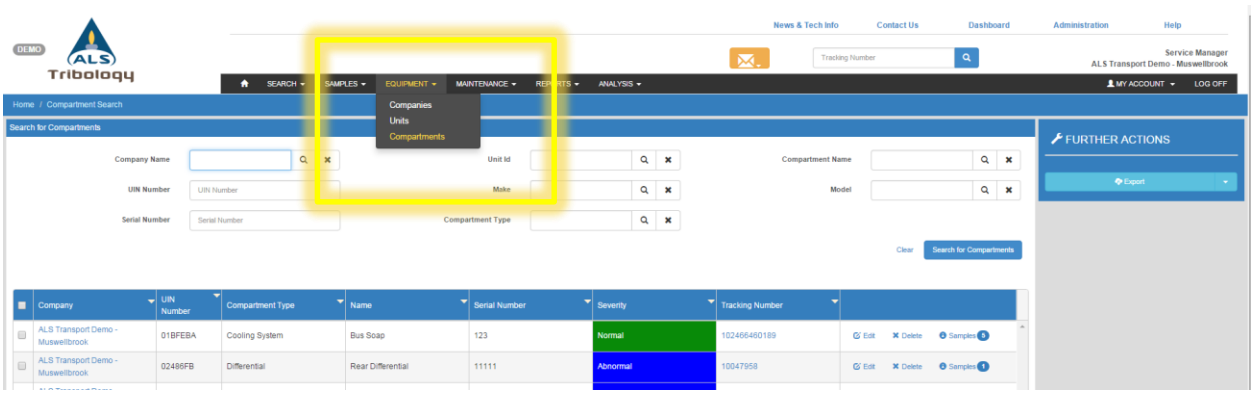


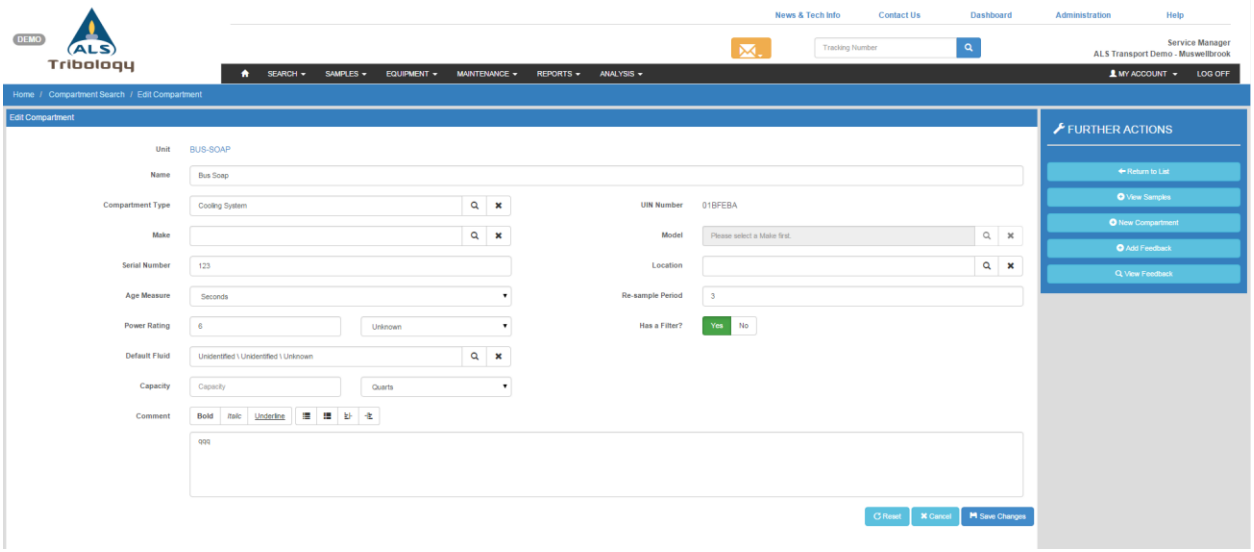


6.3 Compartments

Some basic operations that can be performed under compartments are:

- Search for a compartment by
  - Company name
  - Unit Id
  - Compartment Name
  - UIN Number
  - Make
  - Model
- View sample details such as severity, last sampled date, and tracking number etc.
  - Click on the 'Samples' hyperlink to view all samples associated with a particular compartment.
- View Compartment details
  - To view compartment details click on the 'New Unit' hyperlink.
- Edit compartment details. Please note: this option can only be performed by the equipment administrator.



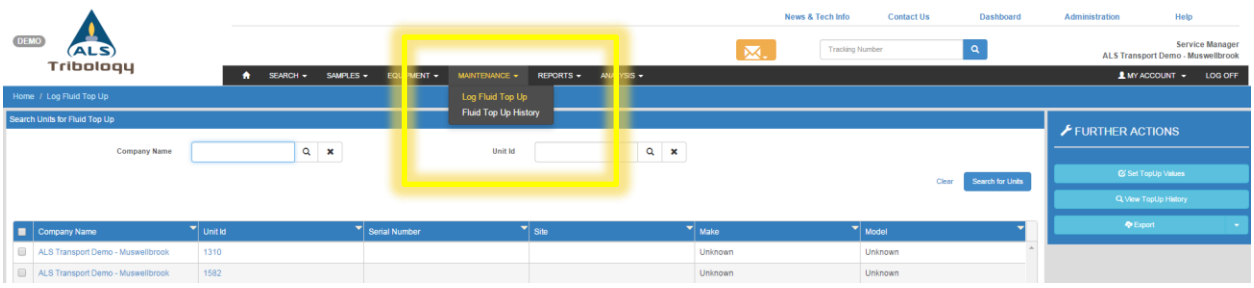


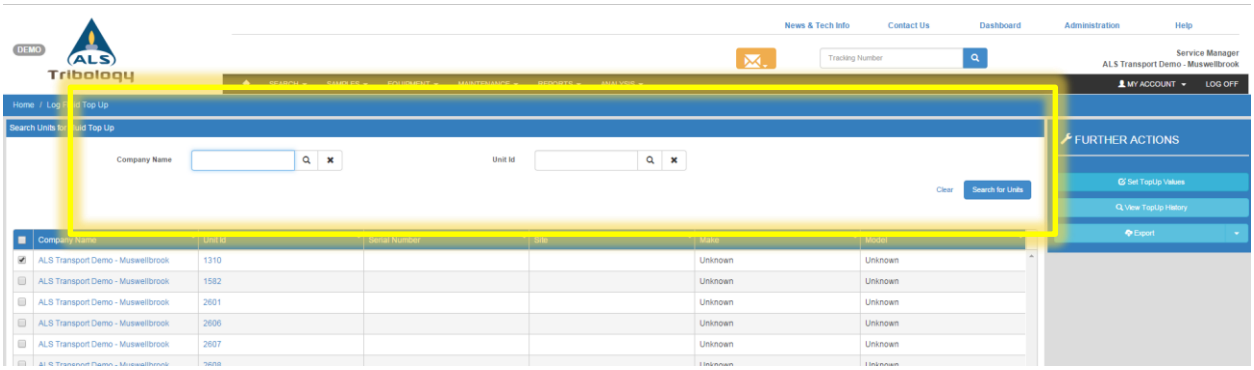
7 Maintenance

The Maintenance menu allows users to maintain equipment and perform the following actions.

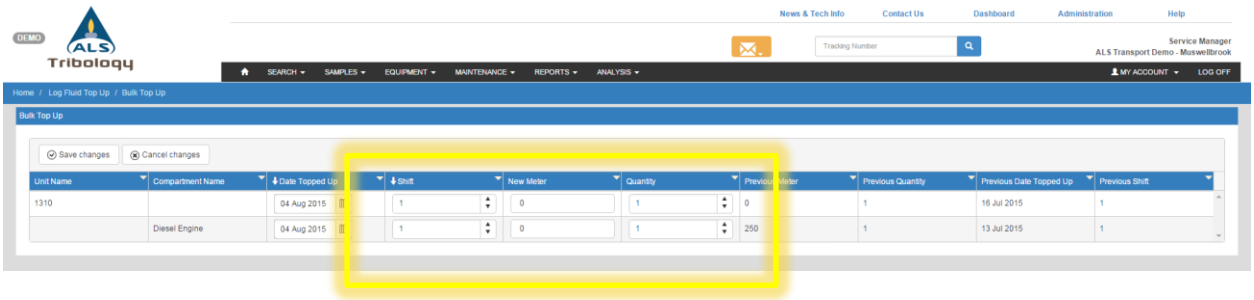
7.1 Log Fluid Top Up

This allows the user to search for units by company and/or unit id.



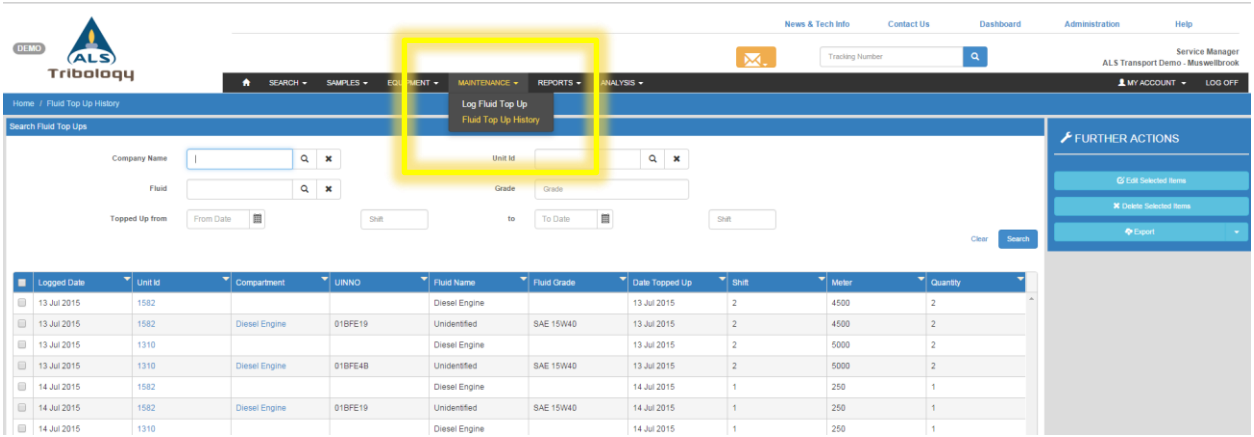


To enter data for current shift, new meter reading and quantity select the 'Set TopUp Values' button under the further actions menu.



7.2 Fluid Top-Up History

This allows the user to view the history of all the top-ups performed on your equipment as well as edit/delete top-ups if required.



7.3 Bulk Fluid Update

This allows the fluid administrator to update the current fluid of multiple compartments. The fluid administrator can select the compartment type, company name, current fluid, unit id and location of their equipment to view the result list.

To update a fluid for the selected compartment, click 'Update Selected Compartments' under the further actions menu. Select the respective fluid for the compartment and click the 'Update Fluid' button.

8 My Account

The My Account features give users quick access to change a password or update details.

8.1 Change My Password

To change your password enter and confirm your new password and click the 'Change Password' button. Once your password has been successfully changed you will be navigated to the home page.

8.2 Update My Details

This options allows users to update details such as name, address and contact information.

ALS Tribology

www.alsglobal.com

Global Tribology Locations

Australia

Brisbane—Laboratory
41 Yarraman Place
Virginia, Queensland 4014
+61 7 3326 6300

Perth—Laboratory
109 Bannister Road
Canning Vale
Western Australia 6155
+61 8 9232 0400

Sydney—Laboratory
2/171-175 Newton Road
Wetherill Park
NSW 2164
+61 2 8786 3150

Muswellbrook—Laboratory
Unit 2, Lot 6 Industrial Close
Muswellbrook
NSW 2333
+61 2 6541 3865

Canada

Burlington, Ontario—Laboratory
1240 Burloak Drive, Unit 6
Burlington, ON L7L 6B3
+1 905 332 9559

Edmonton, Alberta—Laboratory
10717-176 Street
Edmonton, AB T5S 1K1
+1 780 483 1036

Chile

Santiago—Laboratory
Av. Américo Vespucio 2760-H Conchalí
Centro Empresas El Cortijo
Santiago, Chile
+ 56 2 24069770

Czech Republic

Prague—Laboratory
Na Harfe 336/9
190 00 Prague 9,
Prague, Czech Republic
+420 284 081 575

Malaysia

Kuala Lumpur—Laboratory
9 Jalan Astaka, U8/84, Section U8,
Bukit Jelutong
Shah Alam
Kuala Lumpur 40150
+603 7845 8257

New Zealand

Wellington—Laboratory
74 Seaview Road
Lower Hutt
Wellington, New Zealand
+64 04 586 6202

Singapore

Singapore—Laboratory
14 Little Road, #07-01 & #08-01
Tropical Industrial Building
Singapore 536987
+65 6283 9268

United States

Atlanta, Georgia—Laboratory
3121 Presidential Drive
Atlanta, GA 30340
+1 770 454 8000

Cleveland Technical Center—Laboratory
6180 Halle Drive, Suite D
Valley View, OH 44125
+1 216 674 4600

Houston, Texas—Sales & Marketing
10450 Stancliff Road, Suite 210
Houston, TX 77099
+1 281 599 1242

Kansas City, Kansas—Laboratory
935 Sunshine Road
Kansas City, KS 66115
+1 913 281 9881

Phoenix, Arizona—Laboratory
3319 West Earll Drive
Phoenix, AZ 85017
+1 602 253 6515

Portland, Oregon—Laboratory
4943 NW Front Avenue
Portland, OR 97210
+1 503 286 9845

Reno, Nevada—Laboratory
1375 Greg Street, Suite 104
Sparks, NV 89431
+1 775 358 3869