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System Setup



### Creating the L5 Connect<sup>™</sup> Database

After you have installed the L5 Connect<sup>™</sup> service, you need to create the default database that the system will use. This document will cover the process of creating and configuring this database.

### Database Server

The L5 Connect<sup>™</sup> Service requires an instance of a SQL Server or SQL Server Express available to host the system database. This can be located on the same computer hosting the L5 Connect<sup>™</sup> Service or it can be located on another computer such as a dedicated SQL server. For most installations, SQL Server Express works well for systems that don't have pre-existing database servers available. This document assumes that you have a database server available to host your L5 Connect<sup>™</sup> database. The L5 Connect<sup>™</sup> Bundle installer does provide SQL Server Express.

### Creating the Database

To begin, go to the Windows start menu, open the Snap-on folder, and launch the **Service\_Config** application.



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Snap-on LS Connect Service Configuration	-	×
STADE TIM		
Diagnostics		
Info		
Database		
Licensing		
Data Retention		
Time Synchronization		
Database Migration		

Select the **Database** list item on the left-hand side of the screen.

Snap-on L5 Connect Service Configu	ration	-		×
Diagnostics Info Database	Database Server         localhost\Toolcontrolsys           Database         ToolControlSystem           Windows Authentication			
Licensing Data Retention Time Synchronization Database Migration	SQL Server Login User Name ToolControlSystem_User Change Password 2 Test			
	Copy blank dat Si	Create blank abase creation script to o ave blank database creati Import legacy	databas :lipboar on scrip databas	e + d + ot + e +

The database info screen will display the default database values.

- Database Server This is the URL of the database server that will be hosting the L5 Connect database
- Database This is the name of the L5 Connect database that will be created



- Windows Authentication Check this to use Windows authentication instead of SQL Server login credentials. The Windows user the service is running as must have the proper permissions for the SQL database.
- User Name This is the name of the database user that will be created for use by the L5 Connect service when performing database tasks
   NOTE: The User Name is only used when you are using SQL Server Authentication instead of Windows Authentication.

First verify the Data	base Server and Database are correct.
Snap-on L5 Connect Service Configuration	on – 🗆 🗙
जितनुष्ट	
Diagnostics	Database Server localhost\Toolcontrolsys
Info	Database ToolControlSystem
Database	Windows Authentication
Licensing	SQL Server Login
Data Retention	User Name ToolControlSystem_User
Time Synchronization	Change Password
butabase migration	
	Test
	Create blank database +
	Copy blank database creation script to clipboard +
	Save blank database creation script +
	Import legacy database +

Then you will need to decide whether to use Windows or SQL database authentication. For this example, you will use SQL authentication so leave the **Windows Authentication** checkbox unchecked. You will then need to provide the database **User Name** and **Password** for SQL Server Authentication.



NOTE: The following SQL naming rules apply to the Database name and the User Name values. (1 - 128 chars, 1st must be letter or underscore, subsequent can be letter, number, @\$#\_)

FILE	
Diagnostics Info Database	Database Server localhost\Toolcontrolsys Database ToolControlSystem Okinows Authentication
Licensing Data Retention Time Synchronization Database Migration	SQL Server Login User Name ToolControlSystem_User Change Password Test Create blank database Copy blank database creation script to clipboard Save blank database creation script 4 Import legacy database

Then click the **Change** button, that looks like a pencil, next to **Change Password** to set the password the SQL user account will use to access the L5 Connect<sup>™</sup> database (example: F0urth@ndlnch3\$). **NOTE: This is only used when you are using SQL Authentication.** 

Diagnostics Info Database Licensing Data Retention Time Synchronization Database Migration	Database Server localhost\Toolcontrolsys Database ToolControlSystem Windows Authentication SQL Server Login User Name ToolControlSystem_User Change Password Test Create blank database + Copy blank database creation script to clipboard + Save blank database creation script + Import legacy database +





Click the **OK** button. Then click the Blue **Save** button at the top right of the screen.

Next you will click on the + button next to Create blank database.

Diagnostics       Database Server localhost\Toolcontrolsys         Info       Database ToolControlSystem         Database       Windows Authentication         SQL Server Login       User Name ToolControlSystem_User         Database Migration       Change Password 🖉
Diagnostics         Database Server         localhost\Toolcontrolsys           Info         Database         ToolControlSystem           Database         Windows Authentication           Licensing         SQL Server Login           Data Retention         User Name ToolControlSystem_User           Time Synchronization         Change Password 🖉
Info         Database         DolControlSystem           Database         Windows Authentication         SQL Server Login           Data Retention         User Name ToolControlSystem_User         User Name ToolControlSystem_User           Database Migration         Change Password 🖉
Database     Windows Authentication       Licensing     SQL Server Login       Data Retention     User Name ToolControlSystem_User       Time Synchronization     Change Password 2
Licensing SQL Server Login User Name ToolControlSystem_User Database Migration Database Migration Database Migration
Data Retention     User Name     ToolControlSystem_User       Time Synchronization     Change Password
Time Synchronization Database Migration Change Password
Database Migration
Test >
Create blank database +
Copy blank database creation script to clipboard +
Save blank database creation script +
Import legacy database +

Click Yes to continue.

You are about to create a blank database with the currently selected settings. Are you					
sure?					
	Yes	No			

Click the **SQL Server Login** button. You could instead click the **Windows Authentication** button if you prefer to use Windows based authentication.



Select the login method to use for the db admin account for this operation.					
	SQL Server Login		Windows Authentication		

Input the SQL **sa** account information for SQL Server to authenticate your request. For example: **User Name** – sa

Password - F0urth@ndInch3\$

User Name	ase admin cro	edentials for this o	peration
Password			
C			
	ОК	Cancel	
l			

Then click the **OK** button. The system will then create the database, tables, and SQL user for the L5 Connect<sup>™</sup> Service to use to communicate and store data. When completed click the ✓ button in the top left of the screen.

Inf	Finished
De	Creating database tables
Lic	Granting privileges to database user
De	Creating database user
	Creating database login
	Checking for login
	Creating blank database
	Checking for database
	Creating blank database: SQL Server Login sa

You can test the database connections by clicking on the ► button by Test.

(0-41) Success means everything is good to go.





#### Windows Authentication Mode

The L5 Connect system supports using Windows Authentication, however, it will require some manual configuration. The system will create the ToolControlSystem database automatically with the **Create blank database** button, but you will need to manually make sure that the desired Windows user the service is running under has been properly assigned to the database and given the proper permissions.

To determine what Windows user the service is running under, open the **Services** application in Windows. You can find this by typing services into the Windows search. You will need administrator privileges to run this application.  $\bigcirc$  Services -  $\bigcirc$   $\times$ 

🔿 🖬 🖬	🖗 📝 📷 🕨 🕨 🔳 💵					
Services (Local)	Services (Local)					
	Select an item to view its description	n. Name	Description	Status	Startup Type	Ŀ
		🥋 ActiveX Installer (AxInstSV)	Provides Use		Manual	Ĺ
		🎑 Adobe Acrobat Update Servi	Adobe Acro	Running	Automatic	ι
		🌼 Agent Activation Runtime_2	Runtime for		Manual	ι
		🏟 AllJoyn Router Service	Routes AllJo		Manual (Trigg	ι
		🎑 App Readiness	Gets apps re		Manual	l
		🎑 Application Identity	Determines		Manual (Trigg	l
		🎑 Application Information	Facilitates th	Running	Manual (Trigg	I
		🌼 Application Layer Gateway S	Provides sup		Manual	I
		🌼 Application Management	Processes in		Manual	l
		🌼 AppX Deployment Service (A	Provides infr	Running	Manual (Trigg	I
		🎑 ASP.NET State Service	Provides sup		Manual	1
		🌼 AssignedAccessManager Ser	AssignedAcc		Manual (Trigg	
		🎑 Auto Time Zone Updater	Automaticall		Disabled	
		AVCTP service	This is Audio	Running	Manual (Trigg	I
		AzureAttestService		Running	Automatic	l
		🔍 Background Intelligent Tran	Transfers file	Running	Automatic (De	l
		🖳 Background Tasks Infrastruc	Windows inf	Running	Automatic	l
		🔍 Base Filtering Engine	The Base Filt	Running	Automatic	l
		🍓 BitLocker Drive Encryption S	BDESVC hos	Running	Manual (Trigg	l
		🍓 Block Level Backup Engine S	The WBENGI		Manual	l
		🌼 Bluetooth Audio Gateway Se	Service supp	Running	Manual (Trigg	L
		Rhuetooth Support Service	The Rivetoo	Running	Manual (Trigo	1



#### Scroll down to the Tool Control System Service, then right-click it and select Properties.

Tool Cont	trol Syste	m Service F	Properties (Loc	al Computer)	)	$\times$		
General	Log On	Recovery	Dependencies					
Service	name:	ToolContro	lSystem					
Display	name:	Tool Contro	ol System Servic	æ				
Descript	tion:	Enable Too	ol Control Syster	m Functions				
Path to "C:\Prog	Path to executable: "C:\Program Files (x86)\Tool Control System\Service\Service.exe"							
Startup	type:	Automatic	(Delayed Start)			·		
Service	<b>status:</b> Start	Running	P	ause	Resume			
You car from he	n specify tł re.	ne start para	meters that app	ly when you sta	art the service			
Start pa	rameters:							
			OK	Cancel	Apply	/		

#### Then select the Log On sub-tab to show the Windows user the service is running as.

Tool Control System Service Properties (Local Computer) $\times$						
General Log On Recovery	Dependencies					
Log on as:						
<ul> <li>Local System account</li> <li>Allow service to interact</li> </ul>	with desktop					
⊖ This account:			Browse			
Password:						
Confirm password:						
	ОК	Cancel	Apply			



The permissions the L5 Connect service requires are shown here.

& General	Scr	ipt 🔹 🕜 Help			
<ul> <li>General</li> <li>Server Roles</li> <li>User Mapping</li> </ul>	Users	mapped to this login:			
<ul> <li>Securacies</li> <li>Status</li> </ul>		Database master model msdb TCS_updateTest tempdb ToolControlSystem	User NT AUTHORITY\SYSTEM	Default Schema	
Connection	Gu	est account enabled for: To	olControlSystem		
Connection Server: CONWW11PHILLIPS\TOOLCONT Connection: SNAPONGLOBAL\ss5952	F Detable	est account enabled for: To ase role membership for: To accessadmin backupoperator datareader datawriter ddladmin denydatareader denydatareader	olControlSystem		
Connection Server: CONWW11PHILLIPS\TOOLCONT Connection: SNAPONGLOBAL\ss5952 View connection properties View connection properties Progress Ready Ready	F Databi db db db db db db db db db db	est account enabled for: To accessadmin backupoperator datareader datawriter ddladmin denvdatareader denvdatavriter owner securityadmin blic	olControlSystem		



### Inspecting the Database Creation Script

In some uncommon cases, you might wish to view the default database creation script that the L5 Connect system uses to create the database and database user or execute it manually. This is very uncommon and should only be done by experienced database administrators. The system provides a way to get this database script so that it can be viewed or manually executed. With the **Database** list item selected on the left hand of the screen you will see a **Copy blank database creation script to clipboard** button. This button will copy the SQL code of the database creation script to the clipboard so that it can be pasted into SSMS. Alternatively, there is also a **Save blank database creation script** button, which will prompt the user to provide a filename and location where the database script will be saved.

Snap-on L5 Connect Service Configu	ration – D X
जितन्तृ	ETT.
Diagnostics	Database Server localhost\Toolcontrolsys
Info	Database ToolControlSystem
Database	Windows Authentication
Licensing Data Retention	SQL Server Login
Time Synchronization	User Name looiControlSystem_User
Database Migration	Change Password 2
	Test
	Create blank database +
	Copy blank database creation script to clipboard +
	Save blank database creation script +
	Import legacy database +



System Date and Time Settings



### L5 Connect System Time Server Configuration

This section will explain the process of setting up the L5 Connect system service as a time server. This will allow all the devices in the L5 system to keep their time synchronized with the L5 service machine. It is critical for the devices in the L5 system to maintain close time synchronization with the L5 service so that they can properly communicate with each other. For L5 systems where the devices are configured to be on a domain, the domain controller will typically provide time synchronization, and this process would not be used. In situations where the devices are not on a local domain and there is not an option for Windows based time server configuration, the L5 system can be configured as a time server using this document.

This document will walk the user through the steps of configuring the L5 system as a time server. The first step is configuring the L5 service to be a time server. The second step is configuring the devices in the system so that they can properly respond to requests from the L5 service to adjust their system time.



### Configuration of the L5 Service

1. Go to the computer on which the L5 Connect service is installed. Open the start menu and scroll down to the Snap-on folder and click it. Then click the Service\_Config shortcut to open the L5 Service configuration application.





2. This will open the L5 Service\_Config application.

E Snap-on LS Connect Service Configuration	-	$\times$
STR.		
Diagnostics       Info       Database       Licensing       Data Retention		
Time Synchronization		

3. Click the "Time Synchronization" item in the list on the left-hand side to open the time sync configuration screen as shown below.

Sereen as shown below.			
Snap-on L5 Connect Service Configuration		-	
<u>जित्तनुष्ट्र</u> ा			
Diagnostics	The service is not currently configured as an NTP time server		
Info			9
Database	Enable Disable		
Licensing			
Data Retention			
Time Synchronization			



4. If the app shows that the service is not currently configured as a time server, click the Enable button. This will configure the server running the L5 Service to be a time server.

Snep-on LS Connect Service Configuration		-	×
নিন্চুন্ত			
Diagnostics	The service is currently configured as an NTP time server		
Database			_
Licensing	Enable		
Data Retention			
Time Synchronization			

5. Once this has been done, devices in the L5 system that are connected to this L5 Service and configured for time synchronization will use this machine as a time server.



### Configuration of an Existing L5 Device

1. There are two scenarios for configuring an L5 device for using a time server. The first is for a device that is already part of the L5 system, i.e., the device has already been connected to the L5 Service. If your device does not show a satellite dish on the main screen then it is in an offline state and has an alert flag as shown below, you might have a time sync problem.

E C	
	SuperUser
BIGIE	Prototype 0001 / Cabin
	Close door to logout
All Users	<u>2 Me</u>
<b>P</b>	
Part Number Details	



2. Clicking the alert flag will show the offline state as shown below.



3. Clicking the diagnostic suitcase button will show details about this error. As shown below it is clear that there is a time mismatch problem.





4. To configure this device to use the L5 Service as a time server you would navigate to the main menu from the home screen. On an L5 Toolbox, click the gear on the main window.



5. On the L5 RFID Cabinet, click the gear on the main screen as well.

		N □ 44 1921 V <	
जित	Ţ <b>J</b> ĒĒ	Phillips, Preston C. Work Loc2	Close door to logout
⊠Me		All Users	<b>*</b> 3
Part Number	Details		



6. Once on the main menu screen click the <u>"I/T Settings" button</u>.

<u>с</u>	Ma	in Menu	
Inventory	Device Status	Audit	I/T Settings
System Changes	Troubleshooting	Volume	A t

7. On the I/T Setting screen click the "Network Setup" button.

Windows Explorer	Task Manager	Network Setup	Hard drive cache settings
Date/Time	System Properties	Viev g File	Card Reader Config
Calibrate Touch Screen	Network Info	Wireless Info	



8. On the Network Setup screen click the "Synchronize Time to Service (Elevated)" button.



 You will then see a window prompting you to enter administrator credentials to continue. The default credentials are: User Name: user1 Password: F0urth@ndInch3\$

After entering the credentials, the device will then configure itself to be able to properly adjust its operating system time when the L5 Service requests it.



### Configuration of a new L5 Device

1. When adding a new device to an existing L5 system that has been configured to operate as a time server, you will be initially put in a Network Setup screen. Once you have properly configured any network parameters and are ready to continue with the process to connect to the L5 Service, click the red close button in the top right corner of the screen.

	Networ	k Setup	
♥Internal Network (Elevated)	Wireless Network Profiles	Network/Sharing	Device Manager     (Elevated)
Date/Time			

2. You can then follow the process to connect to an L5 Service as described in the L5 Connect ATC Operation Guide. Look for the table of contents header "Connecting to a L5 Connect Service". Once you have provided all the required information, the system will detect if the L5 Service has been configured as a time server. If so, it will ask if you wish to configure the device to synchronize its time to the L5 Service.





Select Yes to configure your device to synchronize its time to the L5 Service. You will then see a window
prompting you to enter administrator credentials to continue. The default credentials are:
User Name: user1

**Password**: F0urth@ndInch3\$

After entering the credentials, the device will then configure itself to be able to properly adjust its operating system time when the L5 Service requests it. The device will then continue with the process to join itself to the L5 Service.



4. Now your new device should be added to the L5 System and set up to keep its local time synchronized with the L5 Service machine, ensuring their ability to properly communicate.



### Device Time Zone Configuration

Some features in the L5 Connect system use the local time on the device. Currently, all devices are shipped with the default time zone of Central Standard Time (CST). To modify the time zone on your device, use the following procedure.

**NOTE:** The employee performing this procedure will need the **Date Time** and **IT Function Access** permissions in their profile.

1. Log into your device and click the **Menu** button that looks like a gear.

Site	)EII 🖁	SuperUser	Click to logout
© Me		All Users	
Part Number	Details		



2. Click the I/T Settings button.

<u>С</u>	N	lain Menu	
Inventory	Device Status	Audit	I/T Settings
System Changes	Troubleshooting	Volume	About

3. Click the **Date/Time** button.

	I/T S	Settings	
Windows Explorer	Task Manager	Network Setup	Hard drive cache settings
Date/Time	System Properties	View Log File	Card Reader Config
Calibrate Touch Screen	Network Info	Wireless Info	



4. Click the **Change time zone...** button.



5. Use the **Time zone:** combo box to select the proper time zone.

		I/T Se	ettings	$\overline{\mathbf{cs}}$
	🗃 Date and Time	×		
	💣 Time Zone Settings	×		
Wine	Set the time zone: Time zone: [UTC-06:00] Central Time (US & Canada) (UTC-06:00] Central Time (US & Canada)	· ·	Network Setup	Hard drive cache settings
	(UTC-0600) Exster Island           (UTC-0600) Sastar Island           (UTC-0600) Sastar Island           (UTC-0500) Boopta, Lima, Quito, Rio Branco           (UTC-0500) Boopta, Lima, Quito, Rio Branco           (UTC-0500) Extern Time (US & Canada)           (UTC-0500) Haitian           (UTC-0500) Havana           (UTC-0500) Indiana (Ext)           (UTC-0500) Jurks and Catos	es	View Log File	Card Reader Config
Calibra	(UTC-04-00) Asuncion (UTC-04-00) Asuncion (UTC-04-00) Ciabas (UTC-04-00) Ciabas (UTC-04-00) Georgetown, La Paz, Manaus, San Juan (UTC-04-00) Santaga (UTC-03-00) Santaga (UTC-03-00) Asaguina (UTC-03-00) Realia (UTC-03-00) Realia		Wireless Info	
	(UTC-0300) Levo of outerns AIRES (UTC-0300) Punta Arenas (UTC-0300) Sain Agirer and Miquelon (UTC-0300) Sain Agirer and Miquelon (UTC-0300) Coordinated Universal Time-02 (UTC-0200) Gorenland (UTC-0100) Across (UTC-0100) Cabo Verde Is.	~		

6. Click the **OK** button and then click the **OK** button to close the windows and save the change.



### Connecting to a L5 Connect<sup>™</sup> Service

You must connect your new Device to a licensed L5 Connect<sup>™</sup> service. This requires the Device to be connected to a network in which it can communicate with the service. ATC devices need to be connected to the Service to function. However, it can run if the Service or network goes down for a short time. The system is designed to be connected 24/7 to the Service to receive changes and new users and push backups and updates.

### Configuring the Service

The first step is to make sure that you have your L5 Connect<sup>™</sup> Service configured properly for the type of communication you wish to use.

#### Sevice\_Config Application Setup

- 1. On the computer where your L5 Connect<sup>™</sup> service is installed, open the **Windows Start Menu**, expand the **Snap-on** item, and then open the **Service\_Config** application.
- 2. Select the **Info** tab on the left-hand side.

Snap-on L5 Connect Service Configuration	tion – 🗆	×
जितन्तृ		
Diagnostics	Disable Attachments	^
Info	Service Model	1
Database		
Licensing		
Data Retention	✓ Enable	
Time Synchronization	Port 59008	
	Streaming Port 59009	
	TTPS	
	Enable	
	Ontions	
	options	
	Service Throttling Override	
		J
	HTTPS	
	Enable	
	Port 59010	
	☑ Enable	
	Port 59011	v

3. By default, the service will be configured for TCP communication on ports 59008 and 59009 for streaming.

### Configuring HTTPS

1. L5 Connect Supports both TCP and HTTPS connections. You may want to use HTTPS if you are connecting to the service over a WAN connection or the internet to further secure the connection. To use HTTPS, check the **enable** checkbox under the **HTTPS** service model. **NOTE: When you save, you will see a warning that OS** 



t Service Configuratic	
2	
	Status 🕨 🗶 Running 💿
	Software Version 9.9.11.0329
	File Server Path
	Disable Attachments
ization	Service Model
abling th	e HTTPS option requires OS operations to be performed outside of this
5	software. Do you understand and wish to proceed?
	Continue Cancel
	options
	Service Throttling Override
	HTTPS
	☑ Enable
	Port 59010
t Service Configuratio	Port 59010 - D
t Service Configuratio	Port 59010 - 0
t Service Configuratio	Port 59010 - 0
t Service Configuratio	Port 59010  Disable Attachments
	Port 59010  Disable Attachments  Service Model
	Port 59010
	Port 59010  Port 59010  Disable Attachments  Service Model  TCP  TCP  V Enable
	Port 59010
it Service Configuratic	Port 59010  Disable Attachments  Service Model  TCP  Enable  Port 59008  Streaming Port 59009
t service Configuratic	Port 59010  Port 5900  Comparison of the second sec
	Port 59010
ice Configuratic	Port 59010 →
ice Configuratic	Port 59010
vice Configuratic	Port 59010
ation	Port 59010
arvice Configuratic	Port 59010
Service Configuratic	Port 59010
ation	Port 59010 → → → → → → → → →
it service Configuratic	Port 59010
it service Configuratic	Port 59010
it service Configuratic	Port 59010  Disable Attachments  Service Model  TCP  TCP  Tcp  Tcp  Tcp  Tcp  Tcp  Tcp  Tcp  Tc
it service Configuratic	Port 59010  Disable Attachments  Service Model  TCP  Enable  Port 59008  Streaming Port 59009  HTTPS  Enable Host Name Port 0  Service Path Override  Streaming Path Override  Service Throttling Override
it service Configuratic	Port 59010

2. Set the **Host Name** to name of your service's server. This will be the host name that must be used by devices and admin clients to connect.



3. Set the **Port** to the HTTPS port over which you want to communicate. Snap-on recommends using 443 for the port value.

Snap-on L5 Connect Service Configuration	nc	-	$\times$
जित्त्नार			
Diagnostics Info Database Licensing Data Retention Time Synchronization Database Migration	Status ▶ X Stopped ○         Software Version 9.13.6.0212         File Server Path         Disable Attachments □         Service Model         TCP         ✓ Enable         Port 59008         Streaming Port 59009         HTTPS         ✓ Enable         Port 443         ○ Service Path Override         ○ Streaming Path Override         ○ Client Certificate Override         ○ Dptions         ○ Service Throttling Override		

- If you need to add a path to the server name, you can select the Service Path Override checkbox and/or the Streaming Path Override. The default service path is IDeviceService and the default streaming path is IFileStreamService.
- Then input the desired path to replace the default value, making sure that the combination of that path and the rest of the pieces still make a valid URL. The proper format for the host name URL is https://{HOST\_NAME}:{PORT}/{PATH}.
- 6. NOTE: The service path and the streaming path must be different!

gnostics	Status 🕨 🗙 Stopped 📀	
D	Software Version 9.13.6.0212	
abase	File Server Path	
nsing	Disable Attachments	
Retention	Samia Madal	
Synchronization	Service Model	
base Migration	TCP	
	I I I I I I I I I I I I I I I I I I I	
	Port 59008	
	Streaming Port 59009	
	Enable	
	Host Name localhost	
	Port 443	
	Service Path Override	
	snapon/L5/	
	Streaming Path Override	
	Client Certificate Override	

- **-** V



7. Whenever a device communicates with the L5 Connect service, that communication normally includes a certificate that is used to verify the device is a valid L5 Connect device. If the L5 Connect system is deployed in certain environments, IT security software may strip the certificate from these communications. This will cause communication errors with the system. Selecting the **Client Certificate Override** option allows the service to ignore the lack of certificate to prevent these communications errors. The devices also have a unique token that is required for communication with the service, so they will still be properly vetted.

		^
Diagnostics Info Database Licensing Data Retention Time Synchronization	Status X Stopped C Software Version 9.13.6.0212 File Server Path Disable Attachments Service Model	
Database Migration	TCP           ✓ Enable           Port           59008           Streaming Port           59009	]
-	HTTPS ✓ Enable Host Name localhost Port 443 ✓ Service Path Override snapon/L5/ ✓ Streaming Path Override Snapon/L5/streaming ✓ Client Certificate Override	

#### Service Throttling

The L5 Connect<sup>™</sup> Service is a Windows WCF based service and has a default value of maximum concurrent sessions that is 100 times the number of processor cores. Based on this formula, it is recommended that the service machine have one core per 50 devices and admin applications in your L5 Connect<sup>™</sup> system. Otherwise, you will likely experience service instability. Some customers with large L5 Connect<sup>™</sup> installations may wish to manually configure the maximum concurrent sessions to allow a larger number without actually increasing the cores of the server running the L5 Connect<sup>™</sup> service. This can be done using the procedure detailed below. If you do decide to manually configure the maximum concurrent sessions, you should monitor your service process to make sure it has sufficient resources.

- 1. Check the Service Throttling Override checkbox.
- 2. Change the default value of 200 to the desired maximum number of simultaneous connections.
  - o This value needs to be greater than two times the sum of devices and admin clients.

#### Service\_Config Finalization

- 1. Click the save button to save your changes.
- 2. Finally, restart the service by clicking the **X** button to stop it and then the ► button to restart it and make the changes take effect.



#### Setting Up HTTPS Certificate

If you have configured your L5 Connect<sup>™</sup> service to use HTTPS, you will need to follow this procedure:

#### **SSL Certificate**

- 1. Obtain a public SSL certificate and move it to the L5 Connect Service PC. **NOTE: This can be obtained from** several 3rd party providers or your own Certificate Authority server. Check with your IT Department on how to obtain an SSL certificate.
- 2. Also, be sure to set the common name of the certificate to the Host Name specified in the Service\_Config HTTPS setup.
- 3. Required Cert Format: PKCS#12 with private key included in cert.
- 4. Install the cert into the LocalMachine/Personal cert store of the L5 Connect Service PC.
- 5. Make sure to get the thumbprint of cert, it will be used in the following commands. The thumbprint can be found in the cert properties-> Details Tab (Scroll to bottom)
- 6. Highlight and Copy/Paste the thumbprint to a notepad, make sure to remove all the spaces.

#### Map-Server Certificate to Port (on the server)

1. From elevated Command Prompt or PowerShell: Issue this command to bind the cert to all interfaces on the system.

netsh http add sslcert ipport=0.0.0.0:PORT\_TO\_BIND appid={d5bf2edf-23fd-44cf-a984-ccd2095bdd0c} certhash=CERTIFICATE THUMBPRINT

**OR** issue this command to bind the cert to a specific IP address.

```
netsh http add sslcert ipport=IP_OF_INTERFACE:PORT TO BIND
appid={d5bf2edf-23fd-44cfa984-ccd2095bdd0c} certhash=CERTIFICATE
THUMBPRINT
```

### **Configuring Windows Firewall**

Sometimes, for the different pieces of an L5 Connect System to communicate to the Service, changes may need to be made to the Windows firewall on the service machine. Whether this needs to be done, and exactly how it needs to be done, depends on the configuration of the specific L5 Connect system. This section will cover the common scenarios and how to configure the Windows firewall for them.



#### Everything on One PC

2.

For cases where all of the components of the L5 Connect system are on the same PC no firewall configuration needs to be done. For instance, If the system is a single tool crib with the service running on the same PC as the tool crib application, no firewall configuration needs to be done. All the pieces can talk to each other without crossing the firewall boundary. This is probably the least likely but the simplest setup.

#### Distributed System on Corporate Network

When L5 Connect system pieces must communicate across PC boundaries the service PC will need firewall configuration to open ports for that communication. Here is the process used to open ports for the service to communicate. Sometimes you might also need to enable file and printer sharing rules as part of the configuration. But in the case where the system is on a corporate network, there is almost certainly a DNS provider, and this is not necessary and shouldn't be done. It will be discussed more in the next section.

1. Press the **Windows** and **R** keys to open the Run window.

Туре <b>Со</b>	ontrol Panel and click OK.	
💷 Run		$\times$
	Type the name of a program, folder, document, or Internet resource, and Windows will open it for you.	
<u>O</u> pen:	control panel	~
	OK Cancel <u>B</u> rowse.	



3. Select Small Icons and click on Windows Defender Firewall.

All Control Panel Items	- 0	×	
$\leftrightarrow \rightarrow \checkmark \uparrow$ 🛛 Control Pan	el > All Control Panel Items >	✓ C Search Control Panel	Q
Adjust your computer's settings		View by: Small icons *	
AutoPlay	Backup and Restore (Windows 7)	RitLocker Drive Encryption	
Glor Management	Credential Manager	💣 Date and Time	
S Default Programs	Jevice Manager	R Devices and Printers	
Sease of Access Center	File Explorer Options	File History	
A Fonts	lndexing Options	C Internet Options	
👡 Keyboard	Mail (Microsoft Outlook)	<ul> <li>Mouse</li> </ul>	
Network and Sharing Center	Phone and Modern	Power Options	
Programs and Features	SR Recovery	🤧 Region	
🔩 RemoteApp and Desktop Connectio	Y Security and Maintenance	Sound	
Speech Recognition	Storage Spaces	SupportAssist OS Recovery	
Sync Center	System	Taskbar and Navigation	
Iroubleshooting	Ser Accounts	windows Defender Firewall	
Windows Mobility Center	8 Windows Tools	Work Folders	

4. Select Allow an app or feature through Windows Defender Firewall.

Windows Defender Firewall		- 0 <sub>60</sub> ×
← → ∽ ↑ 🅍 « All	Control Panel It > Windows Defender Firewall	✓ C Search Control Panel
Control Panel Home	Help protect your PC with Window	vs Defender Firewall
Allow an app or feature through Windows Defender	ternet or a network.	ackers or malicious software from gaining access to your
Change potification settings	Private networks	Not connected ~
<ul> <li>Turn Windows Defender</li> <li>Firewall on or off</li> </ul>	Guest or public networks	Connected
👎 Restore defaults	Networks in public places such as airports or	coffee shops
Advanced settings Troubleshoot my network	Windows Defender Firewall state:	On
	Incoming connections:	Block all connections to apps that are not on the list of allowed apps
	Active public networks:	METGEAR97-5G
	Notification state:	Notify me when Windows Defender Firewall blocks a new app


#### .... ~ 5. Cli . .

ck the <b>Ch</b>	ange Settings button.				
Allowed app	35			-	
÷ > `	🕐 🛧 🏙 « Windows Defender Firewall > Allowed apps 🛛 🗸 🤇	Searc	h Contro	Panel	
	Allow apps to communicate through Windows Defender Firewa	all			
	To add, change, or remove allowed apps and ports, click Change settings.				
	What are the risks of allowing an app to communicate?	🐤 Cha	nge settir	igs	
	Allowed apps and features:				
	Name	Private	Public	_	
		2	8		
	⊠AllJoyn Router				
	☑App Installer				
	BranchCache - Content Retrieval (Uses HTTP)				
	BranchCache - Hosted Cache Client (Uses HTTPS)				
	BranchCache - Hosted Cache Server (Uses HTTPS)				
	□BranchCache - Peer Discovery (Uses WSD)				
	Captive Portal Flow	2			
	Cast to Device functionality				
	In Clipchamp				
	Cloud Identity				
	Connected Devices Platform	2	8		

Allow another app..

Remove

Cancel

Details...

OK

Allowed app				- (°)
$\leftrightarrow \rightarrow \checkmark$	↑ 🎥 - Windows Defender Firewall → Allowed apps ∨ C	Searc	th Control Pane	م م
	Allow apps to communicate through Windows Defender Firewall			
	To add, change, or remove allowed apps and ports, click Change settings.			
	What are the risks of allowing an app to communicate?		nge settings	
	Allowed apps and features:			
	Name	Private	Public	
	2 (78E1CD88-49E3-476E-B926-580E596AD309)	2	8	
	Ø AllJoyn Router	8	0	
	ØApp Installer		8	
	BranchCache - Content Retrieval (Uses HTTP)			
	BranchCache - Hosted Cache Client (Uses HTTPS)		•	
	BranchCache - Hosted Cache Server (Uses HTTPS)		0	
	BranchCache - Peer Discovery (Uses WSD)		0	
	BCaptive Portal Flow	2	22	
	BCast to Device functionality	8	8	
		8	8	
	Second Identity	2	8	
	Connected Devices Platform	2	R	
	Details	<u></u>	Remove	
		Allow and	other app	



7. Click the **Browse** button.

Add an app	X
Select the app you want to add, or click Browse to find one t and then click OK.	hat is not listed,
Apps:	
	_
	ł
Path:	Browse
Path: 	Browse
Path: <u>/hat are the risks of unblocking an app?</u> ou can choose which network types to add this app to.	Browse

8. Select This PC and double-click on the C: drive.

🏙 Browse				<u>ت</u>
$\leftrightarrow$ $\rightarrow$ $\checkmark$ $\uparrow$	> This PC >	~ C	Search This PC	Q
Organize 👻				8 • 🔳 😗
🛓 Downloads 🖈	~ Devices and drives			
📔 Documents 🖈	OS (C:)			
🔀 Pictures 🛛 🖈	408 GB free o	f 474 GB	-	
🚱 Music 🛛 🖈	USB Drive (D:)	)		
🔰 Videos 🔹 🖈	26.0 GB free o	of 29.3 GB		
🗸 💻 This PC				
> 🖿 OS (C:)				
> 🕳 USB Drive (D:)				
File nar	me:	~	Applications (*. Open	exe;*.com;*.icd)



9. Navigate to c:\Program Files (x86)\Tool Control System\Service, select Service.exe, and click Open. 🏙 Browse e X

	" Tool > Consist >	~ ~ ~	X Courds C	en des		0
	* IOOL > Service >	v (	Search S	ervice		þ
Organize • New folder				≣ •		?
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	<b>x86</b>			7/10/2024 1:0	6 PM	- 1
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> 📥 USB Drive (D:)	Service_Config			/10/2024 7:3	1 AM	Ŧ
> - USB Drive (D:)				ל		
File nan	ne: Service		<ul> <li>Applica</li> </ul>	ns (*.exe;*.co	m;*.icd)	~
			Op	en	Cancel	

 $\sim$ 

10. Make sure **ToolControlServiceHost** is selected and click the **Add** button.

Add an app		×
Select the app you want to add, or click Brow and then click OK.	rse to find one tha	t is not listed,
Apps:		
ToolControlServiceHost		
Path: C:\Program Files (x86)\Tool Co	ntrol S m\S	Browse
What are the risks of unblocking an app? You can choose which network types to add th	nis app	
Network types	Add	Cancel

11. Make sure the appropriate network type(s) for your network environment are checked for ToolControlServiceHost. For simple closed networks (see below) make sure both the Home/Work



Allowed apps		-		5
$\leftarrow \  \   \rightarrow \  \             $	↑ 🎽 « Windows Defender Firewall → Allowed apps ∨ C	Search Control Pan	el	5
	Allow apps to communicate through Windows Defender Firewa			
	To add, change, or remove allowed apps and ports, click Change settings.			
	What are the risks of allowing an app to communicate?	Change settings		
	Allowed apps and features:			
	Name	Private Public		
	Remote Service Management			
	□Remote Shutdown			
	Remote Volume Management			
	Routing and Remote Access			
	Secure Socket Tunneling Protocol			
	SNMP Trap	ê ê .		
	⊠Solitaire & Casual Games			
	⊠ Start			
	Store Experience Host			
	⊠ Take a Test	V V		
	☑ToolControlServiceHost			
	TPM Virtual Smart Card Management			
	Deta	ils Remove		
		Allow another app		
Click OK to	ave the changes.			
Allowed apps		-		50
$\leftarrow \  \   \rightarrow \  \             $	↑ 🅍 « Windows Defender Firewall → Allowed apps ∨ C	Search Control Pane	el	5

To add, change, or remove allowed apps and ports, click Change settings.



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13. Close all open windows.

#### Distributed System Using a Simple Closed Network

Some L5 Connect systems will be installed in a location where there is not already a network to which all the devices can be connected so that they may communicate with each other. In cases like this a simple network may be set up with a router to allow all the devices to connect to the L5 Connect Service application. For this case you will need to configure the firewall to allow the service to accept communication from the devices as described in the previous section. Because the network may not have a DNS service running on, you should also use the following process to enable file and printer sharing. Doing this will allow Net Bios on the service PC to resolve requests across the network that would normally be handled by a DNS server.

1. Perform the process in the previous section until you get to the last step. Instead of closing all open windows proceed to the next step here.



2. Select **Advanced settings**.

See also Security and Maintenance Network and Sharing Center



3. Click **Inbound Rules** and select all **File and Printer Sharing** rules. Right-click on the selection and left-click **Enable Rule**.

File Action View Help							
🕈 🔿 🙍 📷 🗟 🖬							
Accon View Pep     Accon Vi	Inbound Rules Distributed Transaction Coordinator (RCP-L, Distributed Transaction Coordinator (RCP-L, Distributed Transaction Coordinator (RCP-L, File and Printer Sharing (Echo Request - K, File and Printer Sharing (Na-Dutagram-In) Fi	Group Distributed Transaction Coor Distributed Transaction Coor Feedback Hub File and Printer Sharing File Sharing File and Printer Sharing	Profile Domain Privaté, Domain Private, Private, Domain Private, Domain Private, Domain Domain Private, Domain Private, Domain	Enabled No No No No No No No No No No No No No	Action Allow Allow Allow Allow Allow Allow Allow Allow Allow Allow Allow Allow Allow Allow Allow	Actions       Inbound Rules.       Image: State Rule       Image: Rule Rule       Image: Rule Rule Rule       Image: Rule Rule Rule Rule Rule Rule       Image: Rule Rule Rule Rule Rule Rule Rule Rule	
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	Key Management Service (TCP-In)	Key Management Service	Private	No	Allow		

4. Close all open windows.

## How to Connect the L5 Administrator Application to an L5 Connect<sup>™</sup> Service

1. Start the admin application.



2. Click the **New** button to create a new service connection type.



3. Enter the computer name, domain, or static IP address of the server hosting the L5 Connect<sup>™</sup> Service in the **Service Host** field. This must match the **Host Name** field configured in the Service\_Config portion of the document when using HTTPS.

45 ServiceSelector	Window	—		$\times$
Enter the s	service connection info	Ļ		
Service Host		•		
Port	59008			
Optional	HTTPS			_
	Cancel	ОК	_	

4. If you changed the default port value in your service configuration you will need to set the **Port** value to match that value.



5. By default, the L5 Connect<sup>™</sup> Service communicates over TCP. If you have configured the service to communicate via HTTPS select the **HTTPS** checkbox.

<sup>L</sup> 5 ServiceSelector	_		$\times$					
Enter the service connection info								
Service Host	e Host MyServiceComputer							
Port	443							
<ul> <li>✓ HTTPS</li> <li>✓ Optional</li> <li>✓ Advanced Mode</li> </ul>								
	Cancel	ОК						

6. Expanding the **Optional** section will reveal the **Friendly Name** field. This field can be used to give the service connection a different name than the **Service Host** field. This could be useful if you were using an IP address for the service host field and you could provide a service connection field that is easier to remember.

45 ServiceSelectorWin	—		×					
Enter the service connection info								
Service Host 10.59.34.217								
Port 44	<b>Port</b> 443							
HTTPS     Optional								
Friendly Name	MyServiceComputer(https)							
Advanced Mode								
Car	OK							

- Expanding the Advanced Mode section will reveal the Service Path Override and Streaming Path
  Override checkboxes. If you added paths to your service configuration you will need to match those paths
  here.
- 8. Finally, click the **OK** button to save this service connection to the list of service connections that will be available to choose from when you start the admin application.
- 9. Click the **Connect** button to connect to your selected service.



## How to Connect L5 Devices to an L5 Connect<sup>™</sup> Service

Required Permissions:

• Add/Remove from Service

When to Use:

- Initial Device Setup
- Network service connection has changed

#### Procedure Tool Crib

The service join process will automatically begin on the first start after installation. You will be prompted to start a new device or restore one backed up on the Service.

#### New Device

1. In this case, you want to create a new device, so you must click the **New** button.



2. Proceed to step 4 on the section below, **All other devices** to continue.



#### Restore Device

1. To restore a crib that has been previously connected to the service from a backup click the **Restore** button.

Tool Crib: Initializing
New
Restore

2. You will then need to enter the serial number of the crib you wish to restore to the system. You can get this from the **Locations** tab of the Admin application. Select the crib from the list of locations and then make sure the **Info** subtab is selected.

45 Snap-on L5 Connect Admin Client, v:9.11.7.0923							141.0			a ×
STITI	ATA	Top Level			Chang	e Current Location	SuperUs	er	(	Click to logou
		Dashboard	Locatio	ns Tools	Tool States	Employees	Groups Hist	ory Reports Settin	gs	
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Tool Crib East				•		de c	5740	20-		· ·
Tool Crib West	Na	me Tool Crit	o East							
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Work Location 1										
Work Location 10	NG	otes								
Work Location 13	Parent Locat	ion Top Lev	el D							
Work Location 14			9							
Work Location 3	Responsible Emplo	vee 2	0							
Work Location 4										
Work Location 5	Serial Number (Devi	ice) Z99AN0	01							
Work Location 6	Current Vers	ion 9.11.7.09	923							
Work Location 7	Service Connect	ion Offline (	10/10/2024 1	(2:27:46 PM)						
Work Location 8	PC I	nfo Doll Inc	OSIDNAC							
Work Location one	PC I	Den nic.	ODFINE .							
Z91BJ001	OS Vers	ion Microso	ft Windows I	11 10.0.19045.	.0					
Z93AU001	Hardware I	nfo								
Z93GS001										
Z94BJ001	Device Info									
Z97AT001	Curture .	10								
Z98AT001	Customer									
Z98BT001	Serial Number (To	ol)								
Z99LS001	Additional In	nfo								
ZA8BT001	User Labe	12								
Show Deleted Items		ag								
	<u> </u>									



3. Now enter the serial number.



4. Then click the green checkmark button in the top left corner. You will briefly see a window showing that the database is being initialized and then you will see the request for credential type.



5. Proceed to step 4 on the section below, **All other devices** to continue.

#### All other devices

- 1. When you start an ATC device for the first time, it may restart to finalize its initial setup.
- 2. Afterwards you will be presented with a network setup window. Use this screen to set up your network connection and then click on the red X in the top right corner to proceed.



- 3. This will bring you to the Service Connection window, which can also be reached through **Main Menu/System Changes/Change Service Connection**
- 4. Next, you will be asked what authentication you want to use to connect to the Service. A user attempting to add a device to a service requires the correct connection permissions. You can join either by badge scan or username and password. We are going to use the badge method.



5. Select **Badge**, then wave the RFID badge near the reader.



6. Next, you will be prompted to select the connection type for the Service. By default, the connection type is TCP. However, HTTPS is an advanced connection type that provides additional security and requires additional setup on the Service to implement. The HTTPS (Advanced Mode) provides the ability to override the default path to the service URL and service streaming URL. These values must match the values



configured for the L5 Service. Click on the correct service connection type.



7. Next, you will be asked to type in the Host Name of the computer running the L5 Connect Service. In this example, we will use the hostname LOCALHOST but this will need to be the name of **YOUR SERVICE** when you are installing this in your environment. Type in localhost and press Enter.

NOTE: The Server name shown here may not match the one in your environment. Please verify your server's hostname or IP and input it here instead of what is displayed.



8. Following that, you will be asked to define the port the Service is listing to for incoming connections. The default is 59008, but this can be defined in the configuration settings of the Service. Enter the correct service



onn	ection port.		
	(n-ratara)	Enter service port	×
		59008	
	7	8	9
	4	5	6
	1	2	3
	~	0	CLR

 If you previously selected HTTPS (Advanced Mode) you will be prompted to Select: Https Service Path. This will give you the choice of selecting to use the DEFAULT path or creating Custom path. Choose the desired path type.





10. If you chose the **Custom** path you will be asked to input an **Https Service Path**. Enter the desired path.



11. You will then be prompted to **Select: Https Streaming Path**. This will give you the choice of selecting to use the **DEFAULT** path or creating **Custom** path. Choose the desired path type.



STEPET.

12. <u>If you chose the **Custom** path you will be asked to input an **Https Streaming Path**. Enter the desired path.</u>



13. The system will then go through some validation checks. You may be prompted to update the software as the software version must match the software version running on the Service. If that happens, just follow the update prompts. When you are done, the software will restart and ask if you want to continue the process of connecting to the Service.

NOTE: During this process you may be prompted to set the Time Sync to the L5Connect service if it has been configured as a Time Server. This will allow the ATC device to keep within the same time as the service.

Once the connection has been established, and all the validations are complete, click on the  $\checkmark$  button.



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#### **Admin Application Basics**

The L5 Connect<sup>™</sup> Administration Client is the tool you will use to manage L5 Connect<sup>™</sup>. It can generate reports, create, and manage users & groups, and set e-mail and text alerts if there are any issues. In addition, you can create and manage your tools, set maintenance and quantity monitors, and much more. The Admin Client is your control and management dashboard to L5 Connect<sup>™</sup>.

### Local User Install vs. Admin User Install

There are two different installers for the admin application. When installing the admin client on a computer, it's important to run the proper installer for how the application will be used. Here is the link for the latest admin application installers. <u>Software Installers</u>

#### L5 Connect<sup>™</sup> AdminClient Installer

This installer requires Windows administrator privileges to install and update the application. This installation will install the application so that any user of the computer will have access to the application.

#### L5 Connect<sup>™</sup> AdminClient Installer(Local User)

This installer does not require Windows administrator privileges to install or update. It will install the application only for the individual Windows user who runs the installer. Before installing this version of the admin client, however, you need to first install some prerequisites. This prerequisite installer has a name of

PreReqs\_Admin\_LocalUser\_X\_X\_X\_XXXX, where the Xs represent the software version. This installer will install .NET Framework 4.8, Visual C++ Redistributable, and Zebra Core Scanner Driver. This prerequisite installer does require Windows administrator privileges. You can contact the Pro Services team for a copy of this installer or download it from the <u>Software Installers</u> website.



## Logging In Locally

Once you have installed the admin application, you can start it by going to the Windows Menu, scrolling down to the **Snap-on** menu, and then clicking the **L5 Connect Admin Client** item.



You will now see the service select screen for the admin application. For more information on how to configure the service selection screen to set up your service connection see the Connecting to a L5 Connect™ Service document.

For this article we will assume that the service has been configured and ready to go. To connect to the service, click the **Connect** button.



45 ServiceSelectorWine	dow			
T	1 <u>[</u> ]	Þ	Z	
Select the sy	stem service	connection		i
localhost				
				Ļ
Cancel	Delete	New	C	Connect

Once you have successfully connected to the service you will be prompted to log into the admin application. Use the credentials provided by your L5 System administrator. If this is the first time any user has logged into this L5 Connect system use the following default credentials.

#### User Name: superuser Password: superuser

This user has the **Superuser** permission profile, which allows him to do anything in the system. You always need to have at least one user with this permission profile. For security, it is recommended that you change the username and password of the default superuser account as soon as possible. Be sure to store the new account credentials in a secure and known location to be used for emergency access to the system.

Enter the above credentials to log into the admin application. Then click the **Login** button.





Once you have completed the login, you will see the admin application dashboard, which provides a view of what is happening in your L5 Connect system.

45 Snap-on L5 Connect Admin Client, v:9.12.1.1001																	– a ×
STITE	29	$\overline{n}$	Top L	evel				Char	ge Current Lo	catio	on 🍃 Su	perUser					Click to logout
			Das	hboar	Loca	tions	Tools	Tool State	s Employe	es	Groups	Histor	y T	Reports	Settings		
		Device St	ntus ! 1	2 🖌	<sup>2</sup> 4 □ Hide	e OK Items	Alerts			ĺw	ork Location	Status	2	1 🗆 Hide C	W Items		Alerts:
		Name	Alerts	Issued	Issued Users	Mngd Out	Alert		Location	· N	Name	Alerts	Issued	Issued Users	Issued Devices	Mngd Out	Alert Location Tool
		Tool Box 1	5	0	0	0	Offline		Tool Crib East	· v	Work Loc2	0	1	1	1	0	
System Status Filt	<u>tered</u> <u>Tot</u>	al Z91BJ001	5	0	0	0	Maint	enance Overdue	Tool Crib East	1	Work Location 1	0	0	0	0	0	1
Devices Online :	<b>0</b> 0	ZA8BT001	2	0	0	0	Maint	enance Overdue	Tool Crib East	( I V	Work Location or	c 0	0	0	0	0	1
Devices Offline :	12 12	Tool Crib E	ist 15	14	4	0	Maint	enance Overdue	Tool Crib East	11	Work Location 3	0	0	0	0	0	1
Tools Issued :	<b>16</b> 16	Z98AT001	6	0	0	0	Maint	enance Overdue	Tool Crib East	11	Work Location 4	0	0	0	0	0	1
Users with Tools Issued :	5 5	Z99LS001	2	1	1	0	Maint	enance Overdue	Tool Crib East		Work Location 5	0	0	0	0	0	
Devices with Tools Issued :	<b>3</b> 3	Z94BJ001	1	4	1	0	Maint	enance Overdue	Tool Crib East		Work Location 6	0	0	0	0	0	
Tools Issued with Alerts :	<b>0</b> 0	Z98BT001	1	1	1	0	Maint	enance Overdue	Tool Crib East	11	Work Location 7	0	0	0	0	0	1
Managed Tools Out :	0 0	Tool Crib V	lest 1	0	0	0	Maint	enance Overdue	Tool Crib East	1	Nork Location 8	0	0	0	0	0	
Tools Managed : 15	581 15	1 Z93GS001	1	0	0	0	Maint	enance Overdue	Tool Crib East	11	Work Location 10	0	0	0	0	0	1
Tools Managed . 1.	501 150	Z97AT001	1	0	0	0	Maint	enance Overdue	Tool Crib East	11	Nork Location 13	0	0	0	0	0	
		Z93AU001		0	0	0	Maint	enance Overdue	Tool Crib Fast		Nork Location 14	0	0	0	0	0	
					-		Maint	ananco Quardua	Tool Crib East							-	1
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SuperUser 2	2 Work Loc2			1	Z99LS001			1	Tool Box 1			1DA22	1HP NO	WRENCHES	Sioux 1DA221	IP Die Grin	der
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Runner, Rhode 1	1				Z98BT001			1	Tool Box 1			47ACP			Pliers, Combina	ation Slip-J	oint, Industrial Finist
Contract 1									Tool Box 1			47ACP			Pliers, Combina Cutters, Diagon	ation Slip-Jo nal, Vinyl G	pint, Industrial Finist
Smith, John J.	<u> </u>								Tool Box 1			87CF			Cutters, Diago	nal, Vinyl G	rips, 7 3/8"
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1	1				l				<								

NOTE: The admin client supports several modes of user authentication for logging in. It can be configured for the current Windows user, in which case you would be logged into the app without entering a username and password if your employee information matches the currently logged in Windows user. It can also be configured to use a unique username and password specific to the admin client, and lastly it can be configured to use domain based Active Directory authentication. For more information on how to configure the admin client authentication see the L5 Connect<sup>™</sup> Authentication Configuration document.



## Logging In with Multiple Services

If your organization has many L5 Connect devices located over a large area you might decide to split them into multiple systems with a separate service for each. You might then need to connect to multiple services from your admin application. This can be done easily by adding additional service connections to your service selection window.

Once you get to the service selection window, click the pull-down menu that shows the name of the currently selected service. We can see that we have three services from which we can choose to connect.

Now when starting the admin application, you would simply click the pull-down menu to select the desired service and then click the **Connect** button.

45 ServiceSelectorWin	dow		- 🗆	×								
T	<u>ा</u> न्	PE		}								
Select the sy	stem service	connection										
South Service	South Service											
localhost												
North Service				- 1								
South Service												
Cancel	Delete	New	Connect									

#### New User Password Change Process

When a new user is added to the system who needs access to the admin application, a system administrator will add a username and temporary password to his employee data. He will then pass that information on to the new user. When that user logs into the system for the first time with that username and password, he will be required to change the password to something else, for security purposes.



## Location Filtering

Once you have completed logging into the admin application the dashboard tab is displayed. This shows you the state of the system in real time. At the top of the applications, you can see the **Change Current Location** button, which shows the current location for which the data in the system will be filtered. This location will default to the home location of the employee who has logged into the application.

45 Snap-on L5 Connect Admin Client, v:9.12.1.1001														- a ×				
STATE	7		Top Le	vel			_	Chan	nge C	Current Loca	atic	on 🍃 Su	perUser					Click to logout
			Dash	board	Locat	tions	roo	Tool State	s	Employee	es	Groups	Histor	y F	Reports	Settings		
	Device St				4 🗆 Hide	OK Items	Alerts:			I	ĺw	/ork Location	Status	1	1 🗆 Hide C	OK Items		Alerts:
		Name	Alerts	Issued	Issued Users	Mngd Out	Alert		Loca	ation	1	Name	Alerts	Issued	Issued Users	Issued Devices	Mngd Out	Alert Location Tool
		Tool Box 1	5	0	0	0	Offline		Tool	I Crib East		Work Loc2	0	1	1	1	0	
System Status Filte	<u>ered</u> <u>Total</u>	Z91BJ001	5	0	0	0	Mainter	ance Overdue	Too	I Crib East		Work Location 1	0	0	0	0	0	
Devices Online : 0	0 0	ZA8BT001	2	0	0	0	Mainter	ance Overdue	Too	Crib East	L T	Work Location or	0	0	0	0	0	
Devices Offline : 1	<b>2</b> 12	Tool Crib East	15	14	4	0	Mainter	ance Overdue	Tool	Crib East		Work Location 3	0	0	0	0	0	
Tools Issued : 1	<b>6</b> 16	Z98AT001	6	0	0	0	Mainter	ance Overdue	Too	Crib East		Work Location 4	0	0	0	0	0	
Users with Tools Issued : 5	5 5	Z99L5001	2	1	1	0	Mainter	ance Overdue	Too	Crib East		Work Location 5	0	0	0	0	0	
Devices with Tools Issued : 3	<b>3</b> 3	Z94BJ001		4	1	0	Mainter	ance Overdue	Too	Crib East		Work Location 6	0	0	0	0	0	
Tools Issued with Alerts : 0	<b>n</b> 0	Z98BT001		1	1	0	Mainter	ance Overdue	Too	Crib East		Work Location 7	0	0	0	0	0	
Managed Tools Out : 0		Tool Crib West			0	0	Mainter	ance Overdue	Tool	Crib East		Work Location 8		0	0	0	0	
Table Managed 10015 Out . 15	01 1E01	79365001			0	0	Mainter	ance Overdue	Tool	Crib East		Work Location 1		0	0	0	0	
Tools Managed : 15	01 1001	79747001			0	0	Mainter	ance Overdue	Tee	Celle East		Work Location 12		0	0	0	0	
		70341001		-	0	0	Mainter	ance Overdue	Tee	Crib East		Work Location 13		0	0	0	0	
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2 A	Ender One			2	70 10 10 01				Т	Tool Box 1			1410	NO KEY		Sioux 1410 Dri		^
Plane Maintenance Hangar, Preston Z	Faise Org			2	29483001			4	I	fool Box 1			1650			Prybar, 16"		
SuperUser 2	Work Loc2			1	Z99LS001			1	1	Fool Box 1			1AM1	541	WRENCHES	Sioux 45 Degre	e Angle Air	Drill,
					_				- F	Fool Box 1			20800	P	/ WRENCHES	Pliers, Angle N	ose	
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Smith, John J. 1									1	fool Box 1			87CF			Cutters, Diago	nal, Vinyl Gr nal, Vinyl Gr	ips, 7 3/8"
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	1								T	Fool Box 1			91ACF	•		Pliers, Adjustal	ole Joint, In	terlocking Channel,
	1								1 -	Tool Box 1			96CF			Pliers, Long No	edle Nose,	Vinyl Grips, 8"
	1									Tool Box 1			96CF			Pliers, Long Ne	edle Nose,	Vinyl Grips, 8"
	1								1 t	Fool Box 1			97CCP			Pliers, Needle	Nose, Vinyl	Grips, 8"
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	1									<								>

Because the Superuser account is logged in, the current location is the **Top Level** location, so there is no filtering of data. Suppose he was currently interested in seeing the state of things in the **Maintenance** part of the system. He would click the **Change Current Location** button. This will open the **Select Current Location** window allowing him to choose a new current location. He can then select the **Maintenance** location and then the **OK** button to confirm his selection.





Notice the change in the dashboard display after this new current location is selected compared to when he first logged in and it was set to **Top Level**. Also, it should be pointed out that data is not only filtered by the current location but also by the system profile of the currently logged in user. For more information on how to configure user profiles see the Configuring User Profiles document.



#### Authentication Configuration

This document will explain the different types of authentications that can be used in the L5 Connect<sup>™</sup> system and how each is configured. Three authentication methods are available within L5 Connect<sup>™</sup> to access the Administration functions. You can change the type of authentication by going to **Settings** -> **Network Setup** -> **Authentication** in the L5 Connect<sup>™</sup> Admin Client.

45 Snap-on LS Connect Admin Client, v:9.11.2.0802		- 0 ×
Change Current Change Current	rent Location	Click to logout
Dashboard Locations Tools Tool States Em	nployees Groups History History 2.0 Reports S	ettings
Authentication		
About About Alternation Local File Servers Service Configuration Diagnostics Local Settings		

NOTE: These Authentication Methods are primarily used to access the Admin Client but are used in other parts of the system such as for access to admin mode in the True-Crib or for joining a device to the service.



## Self-Contained

This is the default method of authentication. It uses the L5 Connect<sup>™</sup> Database to store employee data. Admins will need to type in an admin username and password to access the administrative functions. When an Admin attempts to log in this way, the database checks for the credentials of that Admin.

1. To configure a user to have admin access with the self-contained configuration start the admin application and log in as someone with the permission to add and edit employees, then go to the **Employees** tab.



2. Either create a new user or select the user to whom you wish to give admin access and click the **Create Login** button.

45 Snap-on L5 Connect Admin Client, v:9.11.3.0903											-	o ×
		Top Level					💆 Si	uperUser				
Harris Int					Chang	e Current Location					Cli	k to logout
		Dashbaard	Locations	Teels	Tool States	Employees	Ground	History	History 2.0	Penerte	Cattings	1
		Dashboard	Locations	TOOIS	Toor states	Employees	Groups	HISTORY	History 2.0	Keports	setungs	
С. <u>×</u>												
Name ~	Asse	mbly Area A, Ad	min									
Assembly Area A Line 0, Anne												
Assembly Area A Line 0, Gene	Info Profiles	Memberships	Subscription	s Att	achments							
Assembly Area A Line 0, James	Last Name Ass	embly Area A					Radge I	nfo —	_			
Assembly Area A Line 1, Becca	Eiset Name Add	min				[	baugen					
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Assembly Area A Line 1, Chris	M. Initial						Temp Bad	lge 🧷 🗙				
Assembly Area A Line 2, Amy	litie					L			-			
Assembly Area A Line 2, Lisa	Customer ID					ſ	Photo -		<b>٦</b>			
Assembly Area A Line 2, Mike	Email								1			
Assembly Area R Line 0 Dean	Cell Phone		Carrier	None ~					1			
Assembly Area B Line 0, Dean	Home Location Top	o Level 🖉							1			
Assembly Area B Line 0, Sara									1			
Assembly Area B Line 1, Jess	Language De	vice Default				Ŭ			1			
Assembly Area B Line 1, Jim	Admin Login -					l			1			
Assembly Area B Line 1, Opal			Create Login						1			
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Helicopter Maintenance Hangar, Ali												
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Show Deleted Items												



3. Enter a **User Name** and **Password** and then confirm the password. The password must be at least 6 characters, and the user will be prompted to change it upon their first login.

New Pass	word
User Name	
Password	
<b>Confirm Password</b>	
ОК	Cancel

4. Click the blue **Save** button to save the change and your user will be set up to log into the admin application.

#### Domain Based

This method utilizes an Active Directory domain to handle user authorization. An L5 Connect employee's username must be set to their domain username. When they log into the L5 Connect system they will put in this username and their domain password. These will be passed on to Active Directory by the L5 Connect system to verify that access should be granted. **NOTE: The L5 Connect system does not store Active Directory passwords. It merely forwards that information to Active Directory for a yes or no response on whether the user is authenticated.** If Active Directory says the credentials are valid, the employee who's **User Name** matches the domain username of the credentials will be granted access to the L5 Connect system.

When you attempt to configure the system to use Domain Based Authentication, you will be prompted to provide a valid username and password on that domain so that the L5 Connect system can make sure you will have at least one account that can access the system. This username and password will be used to verify that you can successfully log into the Active Directory for the domain upon saving, so be sure to set the domain as well before attempting to save your changes. The username will be saved as the L5 Connect **User Name** for the employee who configures the system for domain-based authentication.

Please provide new login cr User Name	edentials to ensure that you can still access the system after changing settings.
Password	
Confirm Password	
	OK Cancel



Then, type in the domain name and click the + button to add it. To remove a domain, select the name in the list and click the  $\times$  button to remove a domain. Click the blue **Save** button once your domain has been set.

5 Snap-on L5 Connect Admin Client, v:9.11.3.0903			i A							- 🛛 ×
Saman	Top Level			Change	Current Locatio	m 🍰 s	uperUser			Click to logout
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	History 2.0	Reports	Settings
Authentication										
About A Network Setup API Tokens Authentication Local File Servers Service Configuration Diagnostics Local Settings	e Domain Bas	ed	er credeni	ials						

Other users requiring admin access will then need their L5 Connect **User Name** set to their domain-based username. At that point they will be able to log into the L5 Connect admin application with their domain credentials or authenticate other tasks.

Assembly Area B Line 0, Liv	
Last Name Assembly Area B Line 0	Badge Info
First Name Liv	Badge 🗸 🗙
M. Initial	Temp Badge
Title	
Customer ID	«Photo ———
Email	
Cell Phone Carrier None *	
Home Location Assembly Area B Line 0	
Language Device Default	·
ſ Admin Login	
User Name LivDomainName	
Clear Login	



#### **Current Windows User**

This method will allow users to authenticate without typing in a username or password (Single-Sign on). It utilizes the current windows session to log the user in.

NOTE: The Current Windows User auto-login feature only applies to the L5 Connect Admin Client. When interfacing with connected devices (ATC Toolbox, True-Crib, etc.) the user must authenticate with their domain username and password to gain access to administration functionality.

When you select this authentication mode, you will be prompted that your username will be changed to the currently logged in Windows username.



After clicking the **OK** button, you will need to add a domain to the domain list. Type in the domain name and click the + button to add it. To remove a domain, select the name in the list and click the  $\times$  button to remove a domain. Click the blue **Save** button once your domain has been set.





At this point if you go to the **Employees** tab and look at the info for the employee who just changed the authentication mode, you will see that their **User Name** has automatically changed to their domain username and that they no longer have a password associated with it.

		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	History 2.0	Reports	Settings
	Sup	erUser									
Info	Profiles	Memberships	Subscription	s Att	achments						
La	<b>st Name</b> Su	perUser					Badge lı	ıfo ——	Г		
Fin	st Name						Bad	ge 🗸 🗙			
N	VI. Initial						Temp Bad		1		
	Title								1		
Cust	omer ID						Photo –		-		
	Email										
Ce	ll Phone		Carrier	None ×							
Home I	Location To	p Level 🖉									
La	anguage De	evice Default				~					
Adm	in Login ·										
User N	Name ss595	2									
			Clear L	ogin			Ø				

Any other users who will need to authenticate will need to have their L5 Connect **User Name** changed to their domain username as well.

Assembly Area B Line 0, Liv	
Last Name Assembly Area B Line 0 First Name Liv M. Initial Title Customer ID Email Cell Phone Carrier None ~ Home Location Assembly Area B Line 0 Language Device Default	Badge Info       Badge < ×       Temp Badge < ×       Photo
User Name LivDomainName Clear Login	



#### **SMTP** Configuration

The purpose of this document is to define the process of setting up the L5 Connect system to send emails through an SMTP server. This will allow the system to be able to send subscriptions such as notifications, scheduled reports, etcetera. The process will require access to an SMTP server and configuration of the L5 Connect system.

### **SMTP Server Access**

For the L5 Connect system to be able to successfully send emails, it must have access to an SMTP server. The L5 Connect system supports using no encryption (only recommended on an internal network), or encryption (checking the **Use SSL** checkbox) with an email server that supports the STARTTLS command. The L5 Connect system supports the SMTP Service Extension for Secure SMTP over Transport Layer Security as defined in RFC 3207. Typically supported ports are 25, 2525, 8025, 587 or 80.

An alternate connection method is where an SSL session is established up front before any protocol commands are sent. This connection method is sometimes called SMTP/SSL, SMTP over SSL, or SMTPS and by default uses port 465. This alternate connection method using SSL is not currently supported.

If your organization has access to an internal SMTP server, you can use that. If not you will need to set that up first. There are several free options for setting up an SMTP server such as <u>SMTP2GO</u> That service has been verified to work with the L5 Connect system using port 587.



### L5 Connect Configuration

- 1. Start the L5 Connect Administrator app and log in. You will need the System Configuration -> System Configuration permission to make the required changes.
- 2. Click the **Employees** tab and select your employee information.
- 3. Make sure you have an email address defined. This is required for testing. If editing the employee email is required you will need the **Employee -> Contact Info Edit** permission.
- 4. Click the **Settings** tab.
- Click the carat to expand the Network Setup item.
   5 Snap-on L5 Connect Admin Client, v:9.9.10.0314

STATION	Top Level		
	Dashboard	Locations	Tools
Q =>			
About			
<ul> <li>System Configuration</li> <li>Diagnostics</li> </ul>			
Local Settings			

- 6. Click the **SMTP** sub-item.
- 7. Check the **Enable** checkbox.

#### SMTP Mail Server Configuration

Enable 🗹	
SMTP Host	
SMTP Port	0
From Address	
From Name	
Use SSL	



- 8. For **SMTP Host** you should put the URL of the SMTP server you are using.
- 9. For **SMTP Port** you should put the port number of the SMTP server you are using.
- 10. For the **From Address**, you should put the email address that will be sending the notification email. This will be the address that will appear in the **From** field of the emails sent to employees.
- 11. For the From Name put a name that makes it clear who is sending the email.
- 12. If your SMTP requires authentication information check the **Use SSL** checkbox to enable authentication and encryption.
- 13. For the **User Name** field you will need to enter the username required by the SMTP server for authentication.
- 14. Click the Change Password button.
- 15. For the **Password** and **Confirm Password** boxes enter the password associated with your SMTP server credentials.

Click the **OK** button.

- 16. Click the blue disk button to save the SMTP changes.
- 17. Click the **Send Test Email** button to have a test email sent the email address associated with the employee currently logged into the admin application. You should shortly receive an email at the email address you set for your employee verifying that everything is set up and working.

Enabl	e	~
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SMTP Host	mail.smtp2go.com			
SMTP Port	587			
From Address	I5connectexample@I5connectexample.com			
From Name	L5 Connect System			
Use SSL	$\checkmark$			
User Name	15connectuser			
	Change Password			
	Send Test Email			



#### Data Retention

The L5 Connect system can permanently delete event history and archive image data. This may be desired to comply with maximum data retention requirements, reduce used file storage space, etc. This document contains the procedures to remove past data either automatically or manually.

#### WARNING - All data deleted during the processes described below are permanently removed from the L5 Connect System. Any desired data archiving must be done before following these procedures.

To begin, go to the Windows start menu on the service PC, open the Snap-on folder, and launch the **Service\_Config** application.





I Snap-on LS Connect Service Configuration	-	×
STITE TIM		
Diagnostics		
Info		
Database		
Licensing		
Data Retention		
Time Synchronization		
Database Migration		

Then select the Data Retention tab.

Snap-on L5 Connect Service Configuration

7	
	- 1 -
1651	

iagnostics	Manual Da	ata Cleanup ———	
Database	Data	Delete Older Than	Delete
Licensing Data Retention	History	7/24/2024	
Time Synchronization		7/04/0004	
Database Migration	Archive Im	nage //24/2024 15	
	Automater	ed Data Cleanup Retain data up to X days o Image: Retain data up to X	əld ( days old



### Manual Cleanup

To perform manual cleanup of event history data, use the date picker for the **History** row in the **Manual Data Cleanup** section to set the date the oldest date of data that should be kept. Then click the **Start: Delete** button to initiate the cleanup.

/Ianual Data (	Cleanup ———		
Data	Delete Older Than	Delete	
History	1/3/2025		
Archive Image	7/24/2024		

Then you will be prompted with the number of events that will be deleted, asking if you are sure. Click the **Yes** button to delete these events.



You have successfully cleaned up your event history.

De	lata: His	story /	1/25/20	25
	Success	s: Delete	d (195)	
		ОК		

To perform a manual cleanup of archive images, you use the same procedure with the date picker for the **Archive Image** row.



### Automated Cleanup

The L5 Connect system can be configured to automatically delete data older than a defined number of days. This automated process occurs every night at midnight (local time on the service PC) and when the service is restarted.

WARNING - The data retention time range is based on the current date/time settings of the L5 Connect service PC. Changing the date of that machine to an incorrect future date will result in the deletion of an incorrect data retention range.

NOTE: Before enabling automated cleanup, follow the manual cleanup procedure above. This will avoid possible long duration deletion of multiple days of data during the first automated cleanup process.

#### Configuration

To enable automated data cleanup for event history, click the History: Retain data up to X days old checkbox.

Automated Data Cleanup History: Retain data up to X days old Archive Image: Retain data up to X days old

You will then see a warning that enabling automated data cleanup could potentially cause loss of data if not done properly. Click the continue button.

# Enabling automated data cleanup could potentially cause permanent loss of data if not configured properly. Are you sure you want to continue?



This will be followed by a message that tells you the service will need to be restarted before changes take effect. Click the **OK** button to continue.

The service will need to be restarted before this change takes effect.




You will now see a field that contains the maximum number of days data will be retained. The default value is 365 days. Set this number to the desired value and then click the save button.

Snap-on L5 Connect Service Configuration	tion	- 🗆 ×				
जितनुम्	TI.					
Diagnostics	Manual Data Cleanup					
Info Database	Data Delete Older Than Delete					
Licensing Data Retention	History 1/25/2025 🗊 🕨	•				
Time Synchronization						
Database migration	Archive Image 1724/2024 IS					
	Automated Data Cleanup          History: Retain data up to X days old         365         Archive Image: Retain data up to X days old					

You can repeat this process to configure the archive image automated data retention as well.



#### Restarting the Service

After you make changes to the automated data cleanup section you will need to restart the service.

### NOTE: The service will begin purging data outside of the configured retention range immediately after restart. Verify your retention settings before restarting the service.

Switch to the Info tab of the service config application.

Snap-on L5 Connect Service Configura	tion – 🗆 🗙
जितन्तृ	
Diagnostics Info Database Licensing Data Retention Time Synchronization Database Migration	Status ► X Running ○         Software Version         File Server Path         Disable Attachments         Service Model         TCP         ☑ Enable         Port         Streaming Port         Streaming Port         Streaming Port         Spoo9         HTTPS         □ Enable
	Options  Service Throttling Override  API  HTTPS  Enable Port 59010

Click the X to stop the service.

Status	
Software Version	9.13.
File Server Path	
Disable Attachments	

Then click the **Start** button to restart the service.

Status 🕨 🗙 Running 🔿	
Software Version 1.0123	
File Server Path	
Disable Attachments 🗆	



### API Configuration

This document will detail the process for configuring the L5 Connect API. This allows customers to programmatically monitor and update their L5 Connect system through the API interface. This will require the customer to develop a custom middleware application to interface between their system and the L5 Connect system.

### Licensing

You will need a license to use the API. Here is how to determine if your service license currently supports using the API. This check will need to be performed on the machine hosting the L5 Connect Service.

- 1. Click the **Windows Start** button, then select the **Snap-on** folder, then select the **Service\_Config** application.
- 2. Select the Licensing tab.
- 3. Make sure the AllowCustomerApi checkbox is checked for your license.
- If your license does not currently support using the API contact Pro-Services for help getting and installing the proper license.
   Email: INDPROSERVICES@snapon.com

### Service Configuration

You will need to configure the PC hosting the L5 Connect Service to turn on the API.

- 1. Click the **Windows Start** button, then select the **Snap-on** folder, then select the **Service\_Config** application.
- 2. Make sure the **Info** tab is selected.
- 3. In the API groupbox click the **Enable** checkbox of either the HTTP or HTTPS communication type to enable the desired communication type.
- 4. Set the port to the desired value. Snap-on recommends using port 443 if using HTTPS communication. This port is typically open and should cause less firewall issues. You will need to ensure whatever port you select has appropriate firewall configurations as well.
- 5. Click the **Save** button to save your changes.
- 6. Click the **X** button to stop the service, then click the **Start** button to restart the service.

### Setting up HTTPS Certificate

To ensure a secure connection between the API and your system you will need to configure the communication port with an HTTPS certificate. See the document in the following link for the process on how to do this. This only needs to be done if the port on which you configured the API was not already bound to the certificate in that process. Connecting to a L5 Connect<sup>™</sup> Service (Binding an HTTPS Certificate to the Port)



#### **Bearer Token Generation**

When attempting to access the API, any requests will need to have a valid bearer token embedded in them. These tokens are attached to employees in the system. You can either add a token to an existing employee or create an employee specifically for API requests. Given that the permissions and logged in employee of all API requests will use the employee info and profile of the employee attached to the token, you may want to create an "API Employee". Here is how to create a valid token for an employee.

- 1. On a PC that has the L5 Connect Admin application installed, click the **Windows Start** button, then select the **Snap-on** folder, then select the **L5 Connect Admin Client** application.
- 2. Select the **Settings** tab.
- 3. Expand the **Network Setup** item.
- 4. Select the **API Tokens** item.
- 5. Click the **Plus Icon** to add a token to a new employee.
- 6. Hover over the input box and then select the API employee
  - The "API Employee" can be either an existing employee or you can create a new employee dedicated for API access.
  - The API calls will use the selected employee for event logging and action permissions. Make sure the selected employee has the proper permission profile for your desired API functionality.
  - Reference the L5 Connect Employees document for Employee creation/editing instructions.
- 7. Set the dates for which the token will be valid, then click the **Green Checkmark** button to save.
- 8. Select the API user you just added and then click the *Eye Icon* to view the token. You can copy this token and paste it into where you need it for use in making requests from the API.

NOTE: You can delete/revoke the token by clicking the **Red X** button next to the employee to which the token is assigned.

### How to Use the API

At this point the L5 Connect system API should be ready for use. For more information about how to use the actual API itself, see the links below.

L5 Connect API Demo Website Introduction to the L5 Connect API



Software Features



#### Locations

The goal of this article is to document the purpose of, configuration, and use of locations in the L5 Connect™ system.

One of the most critical concepts in the L5 Connect<sup>™</sup> system is **Locations**. Everything within L5 Connect<sup>™</sup> (**Employees**, **Devices**, **Work Locations**, etc.) are placed and managed in a **Location**. Without locations, it would be challenging to manage all these elements.

So, what is a **Location** regarding L5 Connect<sup>™</sup>? A **Location** is a logical representation of a physical space or organizational Unit within a building or organization. These locations can be nested within other locations to create a hierarchy known as the **Location Tree**.

To help understand this concept, please look at the figure below. The figure is an example of the **Locations Tree** on the **Locations** tab of the admin application. The top level is the highest **Location** in the tree. This **Location** represents the customer's organization.

#### NOTE: You can only have one top level location in an organization.



You have two sub-levels under the top level: **Maintenance** and **Manufacturing**. These sub-levels are nested within the Top Level. They are called organizational locations and can represent either a department or a physical location.

As you can see, there can be multiple levels of nested sub-levels. All these sub-levels inherit the properties and permissions from their "parent" **Location**. Therefore, with a setting defined at the top level, all sub-levels will automatically have that setting.

You can use the **Location Tree** to organize your employees and devices based on where they perform their duties or reside. For example, if Employee A works on assembling new parts in **Assembly Area A Line 0** you could assign their





home location to that location. If they also sometimes worked on Line 1 or Line 2 you might want to assign their home location to **Assembly Area A** so they would have access to all three lines in that area.

### NOTE: When someone is assigned to a Location, (If given permission), they gain access to any resources within that location or any Child-Locations under it.

Employee B is currently training two new employees on **Assembly Area A Line 1** and **Line 2**. To give them access to resources in both locations, you must assign them to the Parent Location, the **Assembly Area A** location. At this Location, Employee B will gain access to resources in both **Line 1** and **Line 2**. Suppose your organization is large with several employees. In that case, you can delegate management tasks of specific sub-locations to managers of those locations. For more information about setting up an employee as an admin, please see the **Employees** section of this guide.



### Admin Setup

The **Location Tree** for your L5 Connect<sup>™</sup> is managed and configured through the Admin application. This section will cover how to use the admin app to configure your **Location Tree** to suit your organization's needs.

#### **Creating a Location**

To build your organization structure in L5 Connect<sup>™</sup>, you must create location objects. These can be either:

**Organizational Location** – This type of Location represents a logical place to organize your company. It could be a building or a department, or a team.

**Work Location** – This type represents where work occurs and where the tool is. It can be a bay or a specific object. See L5 Connect Work Locations and Work Orders for more information.

Create a new Organizational Location to represent an R&D Lab. Place a Work Location within it to describe a prototype part called Prototype 0001.

 To create either of these objects, click on the Green NEW icon button at the bottom left of the Locations Tab.

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		Dashboard	Location	s Tools To	ol States Em	ployees 0	Groups Hi	istory Report	s Settings	
Name ~ Top Level Maintenance	<b>Top Leve</b> Organiza	<b>el</b> ational Locatio	on							
Manufacturing Tool Crib	• Profiles (Employee)	Profiles (Group)	Options	Subscriptions	Audit Types	Quantity	Monitoring	Attachments	Favorites	
Show Deleted Items	Nam Customer I Note Parent Locatio	ne Top Level D bes								



2. Click the Organizational Location button.



NOTE: When you create a new location object, the parent location of that object will default to your current selection. In this case, Top Level is selected, so any new Location Objects will be created with it as the default Parent Location.

After clicking on the **Organizational Location**, you are presented with the location properties of this new location object:

Name – The name of the Location.

**Customer ID** – A unique identifier that can be any combination of numbers and letters. Locations cannot share the same Customer ID.

Notes – A custom note that describes the Location.

**Parent Location** – Designates which Location Object is the Parent of this Location.

**Responsible Employee** – Designates which Employee account is the primary contact for the Location. This Employee will receive alerts for all devices within this Location.

3. Set the Name to R&D Lab.



4. This Location doesn't go under Maintenance or Manufacturing, so set its **Parent Location** to **Top Level**.

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	Dashboard	Locatio	ns Tools	Tool States	Employees	Groups	History	Reports	Settings	
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5. Once you have set the **Name** and **Parent Location**, click the blue Save icon at the top of the location properties screen to finish creating the Location.





6. Now that you have created the location object set the **Responsible Employee** to **R&D Manager**. If the user doesn't exist, you will need to make it on the **Employees** tab. Click on the **pencil** icon to bring up the Employee Selection dialog.

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		8	Dashboard	Locatio	ns Tools 1	ool States E	mployees	Groups Hi	istory Reports	Settings	
C Enter filter text (Use filter keywords (AND/OR Name	) to search f	or multiple terms.) R&D La Organia	<b>ab</b> zational Loca	tion							
<ul> <li>A Top Level Maintenance Manufacturing R&amp;D Lab Topel Crib</li> </ul>	Info	Profiles (Employee)	Profiles (Group)	Options	Subscriptions	Audit Types	Quanti	ity Monitoring	Attachments	Favorites	
		Na	me R&D Lab								
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	I	Parent Locati	an Tan Lawa								
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	Resp	onsible Employ		J							
Show Deleted Items											

7. Click on **R&D Manager** to select it, and then click on the ✓ check button to set it as the responsible Employee.



Q	
R&D Manager	
SuperUser	

NOTE: You will only see employees who have a profile assigned to the location or its parent. More information on how to assign a profile to an employee can be found in the Default and Custom Profiles and Permissions document.

- 8. Once again, click on the **blue Save** button in the upper right-hand corner of the screen to apply your changes.
- 9. With the new Organizational Location added, it is time to add the prototype Work Location. Use the L5 Connect<sup>™</sup> Work Locations and Work Orders article to create and learn more about Work Locations.



#### Editing a Location

Sometimes you need to make a change to a Location. This can be done simply by selecting that object in the Location Tree on the left side of the Locations tab. Once you select the object, you will see its current attributes. Next, change an attribute, and then save.

#### NOTE: Until a change is made, the Save and Cancel buttons will not be visible.

- 1. Select the Prototype 0001 location and then set the Customer ID to PN12345ABC.
- 2. Click the **blue Save** button.

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STITIO		Top Level			Change	Current Loca	ntion	SuperUser			Click to logout
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Name	Prototy Work Lo	<b>pe 0001</b> ocation									
Maintenance Manufacturing * R&D Lab Prototione 0001	Info Profiles (Employee)	Profiles (Group)	Options	Subscriptic	ns Attachn	nents					
Tool Crib	Nar Customer	ne Prototype	0001 \BC								
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1											
Show Deleted Items											



#### Moving a Location

Sometimes the layout of your company may change. L5 Connect<sup>™</sup> allows you to modify your Location Tree when these changes are needed. For example, a company needs to reclaim some space for another project and decides to move their R&D Lab to Maintenance Bay. For this example, you would move the **R&D Lab** under the **Maintenance** location.

NOTE: When moving a Location Object, all Child objects will be moved along with the Parent. Also, if the inheritance option is enabled, the Location Object will assume all the settings of its new Parent. See inheritance and permissions later in the guide for more information.

1. Click the **Pencil** button to edit home location of the R&D Lab and change its parent location from **Top Level** to **Maintenance**.

<sup>45</sup> Snap-on L5 Connect Admin Client, v:9.11.2.0802													- o ×
STORETOR			Top Level			Chan	ge Current	t Location	SI SI	uperUser			Click to logout
			Dashboard	Location	s Tools	Tool States	Empl	loyees	Groups	History	Reports	Settings	
Name		<b>R&amp;D La</b> Organiz	<b>b</b> ational Locat	ion									
Manufacturing           Manufacturing           R&D Lab           Restature 0001	Info	Profiles (Employee)	Profiles (Group)	Options	Subscriptio	ons Audit	Types	Quantity	Monitori	ing Atta	achments	Favorites	
Tool Crib		Nan	R&D Lab										
		Customer											
		Not											
		100	es		_								
		Parent Locatio	on Top Level	⇙<									
		with the Free days	D0:D M		a.								
	Kespo	nsible Employ	ee ROD Mar	lager 🖉 🗴									
Show Deleted Items													



2. Select the Maintenance location and then click the Green Checkmark button.

Select home location		
<ul> <li>Top Level</li> <li>Maintenance</li> <li>Manufacturing</li> <li>Tool Crib</li> </ul>		

3. Click the **Blue Save** button. Once you save the change you will see the Location Tree update to reflect the change.

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STATE	$\overline{n}$	Top Level			Change Cu	irrent Locatio	on 🍃 Sup	perUser			Click to logout
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Q₀ => Name ✓ ✓ Top Level	<b>R&amp;D L</b> Organiz	<b>ab</b> zational Locat	ion								
<ul> <li>✓ Maintenance</li> <li>✓ R&amp;D Lab</li> <li>Prototype 0001</li> </ul>	Info Profiles (Employee)	Profiles (Group)	Options	Subscriptions	Audit Type	s Quanti	ity Monitorin	g Attachn	nents	Favorites	
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Show Deleted Items											



#### Deleting a Location

If you have a location object that is no longer needed, you can delete that object.

When deleting a Location Object, all child objects will be moved up one level and become child objects of deleted object's parent. For example, in the figure below, when deleting Location 2. Object 1 and Object 2 become child objects of TOP LEVEL.





1. Select the **R&D Lab** location from the location tree. Then click on the Red Delete button on the lower-left corner in the locations tab.

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STATE	TI	Top Level			Change (	urrent Locatio	n Su	iperUser			Clie	ck to logout
		Dashboard	Location	Tools	Tool States	Employees	Groups	History	History 2.0	Reports	s Settings	]
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<ul> <li>R&amp;D Lab</li> <li>Prototype 0001</li> </ul>	Info Profiles (Employee)	Profiles (Group)	Options	Subscription	s Audit Typ	es Quantit	ty Monitori	ng Attac	hments i	Favorites		
Tool Crib	Nar Customer Not Parent Locati Responsible Employ	R&D Lab	nce 🖉	)								
Show Deleted Items												

2. You are presented with a verification dialog box. Click **Yes** to proceed or **No** to cancel. In this case, you want to continue, so you need to click **Yes**.

### Are you sure you want to delete R&D Lab?



3. Once you click **Yes**, the Location **R&D Lab** will be removed, and **Prototype 0001** will be moved up one level in the **Location Tree** and become a child of **Maintenance**.





#### Restoring a Location

You can **Restore** a deleted location if you find it was deleted in error or if the Location is to be reinstated due to process changes or restructuring.

1. Select the **Show Deleted Items** checkbox at the bottom of the **Location Tree** to display all deleted location objects.



2. Now you can see the deleted **R&D LAB** and its position in the **Location Tree** when deleted. All deleted location objects are listed with a line through the name.

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ADEIDAID	Top Level			Change	Current Location	n 🍃 Si	ıperUser			Cli	ck to logout
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Name  Top Level  Top Level Manufacturing Tool Crib	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	History 2.0	Reports	Settings	
Show Deleted Items											



3. Select the **R&D Lab** location and then click <u>on the</u> **green Restore** button to restore the Location.

ATTEN	Th	Top Level			Change	e Current Locatio	on S	SuperUser	User Click to logout									
		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	History 2.0	Reports	Settings							
Name · · Top Level · Maintenance Prototype 0001 From State Manufacturing Tool Crib	R&D Organ	Lab izational Location	lter	n is c	leactivat	ed. Click	c resto	re to e	dit.									
Show Deleted Items																		

- 4. Next, uncheck the **Show Deleted Items** checkbox.
- 5. The Location is restored, but as you can see, Prototype 0001 is still a child of Maintenance and not the R&D Lab because it was moved when R&D Lab was deleted. So, all you need to do is move it back by changing the Parent Location property to R&D Lab and then clicking the Save button.

and and a connect manner and manners	
STATE	Top Level Change Current Location SuperUser Click to logou
	Dashboard Locations Tools Tool States Employees Groups History History 2.0 Reports Settings
Name	Prototype 0001 Work Location
Prototype 0001	Info Profiles (Employee) Options Subscriptions Attachments
Tool Crib	Name Prototype 0001 Customer ID PN12345ABC
	Notes Parent Location Maintenance
	Responsible Employee
	Tag 🖉 🗶
Show Deleted Items	



6. And now the **R&D Lab** and **Prototype 0001** work locations have been restored to where they were before.

ATTET	TR	Top Level			Change	e Current Locat	ion 🍃	SuperUser			Clie	ck to logout
		Dashboard	Location	s Tools	Tool States	Employees	Groups	History	History 2.0	Reports	Settings	]
Name       * Top Level       * Maintenance	Prototy Work Le	pe 0001 ocation										
✓ R&D Lab Prototype 0001	Info Profiles (Employee)	Profiles (Group)	Options	Subscriptio	ns Attachr	ments						
Tool Crib	Nar Customer Not Parent Locati Responsible Employ Templa T	Prototype ID PN12345, ies on R&D Lab ee xte xte x x x x x x x x x x x x	20001 ABC									
Show Deleted Items												

NOTE: When restoring a location, all Profiles and Permissions were cleared when it was deleted and must be reset.



### Options

Every location object has a set of options used to customize the behavior of ATC Devices within that Location. You can find these settings by selecting a **Location** in the **Location Tree** and then selecting the **Options** sub-tab.

DE		16										
	_		Dashboard	Location	s Tools	Tool States	Employees	Groups	History	Reports	Settings	
Name v		Engine	Shop	ion								
<ul> <li>Harry's House of Helicopter Repai</li> <li>Maintenance</li> <li>Brake Shop</li> </ul>	Info	Profiles	Profiles	Ontions	Cubecrintia	Audit Tu	our Our ant	tu Manitar			Fauratitas	
Calibration Lab Engine Shop Flight Operations	Info ☑Inher	(Employee) it options from: ons	(Group) Harry's Ho	use of Helico	pter Repair		Jes Quanti	ty Monitor		ichments	Favorites	
<ul> <li>Helicopter Maintenance H</li> <li>Helicopter Maintenance H</li> <li>Helicopter Maintenance H</li> </ul>	Engl	English Language Enable Work Order Entry										
Helicopter Maintenance H 4 Helicopter Maintenance H Tool Box 1	Bar o Sing	ode scan prom le Play	pt W Au Su	ork Order En dio Alert Le ppress Work	try UI Style vel Locations Pr	ompt						
✓ Plane Maintenance Hangar Plane Maintenance Hanga Plane Maintenance Hanga	Sun	Y 1 : 00	AM · De	vice Weekly min Session	Reboot (Dev Timeout (Mi	ice Local Time) nutes)						
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<ul> <li>Assembly Area A Assembly Area A Line 0 Assembly Area A Line 1</li> </ul>	ØR	FID Cabi	net									
Assembly Area A Line 2 Assembly Area B Assembly Area B Line 0	⊙T	ool Crib										
Assembly Area B Line 1 Assembly Area B Line 2 Sinal Assembly Area	⊙P	ortal										
Show Deleted Items	₽	ocker Hu	b									

By default, all child objects inherit their settings from their parent. So initially, all locations would inherit their options from the top level. But you can change these settings if you need to. To disable inheritance for a sub-set of **Locations**, uncheck the box at the top of the Options List.

# ✓Inherit options from: Harry's House of Helicopter Repair Options

#### **Universal Options**

- **Language** This drop down determines what language, from the list of supported languages, will be used for display of text and playing of sounds for the device.
- **Enable Work Order Entry** This check box determines if a user will be required to provide a work order while logging into the device. See L5 Connect<sup>™</sup> Work Locations and Work Orders for more information.
- Work Order Entry UI Style This drop down determines the type of work order. See L5 Connect<sup>™</sup> Work Locations and Work Orders for more information.



- **Bar code scan prompt** Scan or input by keyboard any text string work order
- **Touch screen 10 key** On screen keyboard to input a numeric work order on a whitelist of approved work orders
- **Touch screen full keyboard** On screen keyboard to input an alpha-numeric work order on a whitelist of approved work orders
- Audio Alert Level This drop-down sets how often devices will verbally alert users of important events such as a door/drawer left open
- Suppress Work Locations Prompt This check box determines whether the device will require a work location to be selected during login. See L5 Connect<sup>™</sup> Work Locations and Work Orders for more information.
- Device Weekly Reboot (Device Local Time) This sets the time and day of the week that the device will be rebooted
- Admin Session Timeout (Minutes) This sets time before an admin session will be ended (0 for off)

#### **Optical Toolbox Options**

- Drawer Open Timeout (Seconds) How long a drawer can be open before a verbal alert is played
- **Require drawers opened completely** Determines if the drawers must be opened completely to be considered a good drawer scan
- Archive Image Quality A percentage between 0 and 100 with 100 being maximum quality but at a cost of larger file size
- Save drawer open archive images Determines whether open drawer images should be recorded and saved
- Save drawer closed archive images Determines whether closed drawer images should be recorded and saved
- Block access when tools issued from another toolbox Normal allow access when offline, High block access when offline, Off don't block access
- Inactivity Timeout (Seconds) The time before a device session will be ended
- **Prompt to check in another user's tools** This determines whether a user will be prompted to make sure they really intend to return another user's tools
- **Logout alert warning** This determines whether a user will be warned that he's logging out with unresolved alerts from his session such as a bad drawer scan

#### **RFID** Cabinet Options

- Drawer Open Timeout (Seconds) This is managed by the same value in the optical toolbox options
- Inactivity Timeout (Seconds) This is managed by the same value in the optical toolbox options

#### **Tool Crib Options**

• **Require Employee Signature** - Determines if the employee will need to use the optional signature pad when completing a session



- Require Kit Location Inspection Determines if kit inspections are required at issue/return
- **Tool Crib Session Timeout (Seconds)** Sets the time before an employee session will be automatically ended (0 for off)
- Logout and start a new tool crib session with badge scan Determines if a different employee's badge scan will automatically log off the current session and start a new one for the badge just scanned
- Tool Crib No Attendant Required Determines if a tool crib attendant is required for a session
- **Auto-prompt to Transfer Tool on Tag Scan** If active and a tool from another device is scanned, the process to transfer the home location of that tool to the crib will be prompted

#### **Portal Options**

- **Portal Session Timeout (Seconds)** Sets the time before an employee will be logged out of the portal due to inactivity (0 for off)
- **Prompt to check in another user's tools** This is managed by the same value in the optical toolbox options
- **Require Kit Location Inspection** This is managed by the same value in the tool crib options

#### Locker Hub Options

- Locker Hub Allow Multi-Select Return Determines whether tools must be returned one at a time or not
- Auto-prompt to Transfer Tool on Tag Scan If active and a tool from another device is scanned, the process to transfer the home location of that tool to the crib will be prompted
- Auto-start Tool Return Process on Tag Scan If active and a tool issued from this device is scanned, the tool return process will be initiated automatically
- Auto-start Tool Issue Process on Tag Scan If active and a tool compartment tag from this device that contains a tool is scanned, the tool issue process will be initiated automatically
- **Require Tag Scan on Tool Return** Determines if the tool tag must be scanned during the tool return process
- Require Tag Scan on Tool Issue Determines if the tool tag must be scanned during the tool issue process

NOTE: More information on the other tabs of the location object can be found in the different articles based on the topics in their sub-item title.



#### Work Locations and Work Orders

The goal of this article is to document the purpose of, configuration, and use of work locations and work orders in the L5 Connect<sup>™</sup> system.

### Work Locations

NOTE: Review the L5 Connect<sup>™</sup> Locations article for pre-requisite knowledge before proceeding.

#### **Device Usage**

When Work locations are turned on for the location which hosts a device, a user will be required to select a work location to successfully log into the device. This work location will be assigned to any tools he issues from the box during this session. This can be helpful, if a tool is lost, to know where to start looking for the tool.

When the user is presented with the work location selection screen all of the organizational nodes will be represented, and he will have to navigate through the organizational tree. Work locations must always be under an organizational node, but an organizational node does not have to have work locations under it.

Here is an example of what it might look like logging into an L5 Connect device with work locations turned on.

		Top Level	
Manufacturing (0)	on Maintenance (4)		

1. The user scans his badge to log into the device.

2. He is prompted with the initial screen from which to select a work location. The screen contains **three types of locations**. The first type listed is all the work locations that have been marked as **favorites**. The star at the



beginning denotes that it is a favorite and the blue color and the check under the text show that it is a work location. The second type of location is the **organizational locations** directly under the top level. Notice that there is a number in parentheses on these buttons. That is the number of work locations that exist under that organizational location. The third type of location listed is any **work locations at the top level of the tree that are not favorites**.



3. Let's say that the goal is to select the Helicopter Maintenance Hanger Bay 3 work location. Because that work location has been marked as a favorite the user could easily click that button and with one click, he would have chosen a work location and logged into the box. For purposes of illustration, we will show the alternate path to select this work location if it has not been marked as a favorite. The next step would be to select the Maintenance button. This screen shows all the organizational locations below the Maintenance location and then any work locations assigned to the Maintenance location.

		Maintenance	
Select Work Locatio	on —		
Helicopter Maintenance Hangar (4)	Plane Maintenance Hangar (0)	Engine Shop (0)	Brake Shop (0)
Calibration Lab (0)	Flight Operations (0)		

4. Now the user would select the **Helicopter Maintenance Hangar** button. This screen once again shows all organizational locations followed by any work locations assigned to the **Helicopter Maintenance Hangar** 



5. Next the user would select the **Helicopter Maintenance Hangar Bay 3** button. Finally, he has worked his way through the Location Tree to the work location he wishes to select. **Notice the two buttons in the top left corner. The back button will take the user back to the previous screen. The home button will take the user back to the first screen.** 





6. He would now press the button for the Helicopter Maintenance Hangar Bay 3 work location.



7. The user has now successfully selected a work location and completed logging into the device. You can see the work location listed under his name.

NOTE: Barcode or RFID tags can be assigned to work locations and scanned at the device to shortcut the button selection process. See the Tags on Locations section of this document for more information.



#### Admin Setup

L5 Connect<sup>™</sup> **Work Locations** are managed and configured through the Admin application. This section will cover how to use the admin app to configure your **Work Locations** to suit your organization's needs.

#### Creating a Work Location

This process will create a new Work Location that is placed within the R&D Organizational Location created in the L5 Connect<sup>™</sup> Locations article.

1. Begin by selecting the **R&D Lab** location and then clicking on the **Green NEW icon** button at the bottom left of the Locations Tab.

45 Snap-on L5 Connect Admin Client, v:9.11.2.0802											– 🗆 ×
STATE	$\overline{\mathbf{n}}$	Top Level			Change (	urrent Locatio	on 🍃 Su	perUser			Click to logout
		Dashboard	Location	s Tools	Fool States	Employees	Groups	History	Reports	Settings	
Name ····································	<b>R&amp;D L</b> Organi	<b>ab</b> zational Locat	ion								
Maintenance Manufacturing R&D Lab	Info Profiles (Employee)	Profiles (Group)	Options	Subscription	Audit Typ	es Quanti	ty Monitorin	ng Atta	chments	Favorites	
1001 CTD	Na Customer No Parent Locat	me R&D Lab ID tes ion Top Level	2								
	Responsible Employ	<b>yee</b> R&D Mar	hager 🖉 🗙								
Show Deleted Items											

2. When asked what type of location object you want to create, click the **Work Location** button.

#### Select type for new item



- 3. Set the Name to Prototype 0001.
- 4. Configure the other desired attributes. A Work Location object has the same properties as an Organizational Location object with two additional properties.



- Template A set of sub-divisions for the Work Location. Templates break up a large work location into sub-locations. You can create a single template and then apply them to as many Work Locations as you want. (see more information below)
- Tag A RFID or Barcode tag used to identify the Work Location. NOTE: You will need a badge or barcode scanner to set the TAG attribute.
- 5. Once all the desired attributes are set, click on the Blue save icon in the upper right. The work location is now created. You will then see the Work Location placed under the R&D Lab Org location.

45 Snap-on L5 Connect Admin Client, v:9.11.2.0802											– a ×
	70	Top Level			Change	e Current Location	, 🏼 🍰 s	uperUser			Click to logout
Die		Deckhered	Laurtine	Taala	Teel States	[ Employees ]		Listanu	Bananta	Cottinue.	)
		Dashboard	Locations	loois	lool States	Employees	Groups	History	Keports	Settings	
Q =>	۲										
Name 🗸	Work Lo	cation									
▲ Top Level	4										
Maintenance	Profiles	Profiles	Y								
R&D Lab	nfo (Employee)	(Group)	Options	Subscriptio	ns						
Tool Crib	Nam	Prototype	0001								
	Customer	D	0001								
	Not	es									
	Parent Locatio	n R&D Lab	0								
			_								
	Responsible Employe	*e 🖉 🗙									
	Templa	te 🖉 🗙									
	Ta										
			,								
Show Deleted Items											

#### Editing/Moving/Restoring Work Locations

A Work Location can be edited, moved, and restored just like any other Location. See the L5 Connect<sup>™</sup> Locations article for more information.

#### Work Location Templates

**Templates** are used to divide large **Work Locations** into sub-locations. For example, you have a large vehicle as a Work Location. Just assigning a tool to the **Work Location** doesn't help if you need to know where the tool was used on that vehicle. By using templates, you can set a sub-location to help you narrow down the exact Location that tool was used.

All **Templates** are global and, once created, can be used with any **Work Location** in the system. You can view all **Work Location Templates** from the Settings tab -> System Configuration Menu.



1. To create a **Work Location Template**, select a **Work Location**. From the properties, click on the **Pencil** icon next to Template.

45 Snap-on L5 Connect Admin Client, v:9.11.2.0802											-	o ×
STATE	TI	Top Level			Change	e Current Locati	on 🏂	SuperUser			Clic	ck to logout
		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	History 2.0	Reports	Settings	)
Name  Top Level Maintenance	Prototy Work La	pe 0001										
Prototype 0001	Info (Employee)	(Group)	Options	Subscriptio	ons Attachr	nents						
Tool Crib	Nai Customer No Parent Locati Responsible Employ Templ	ag	0001 ABC									
Show Deleted Items												

2. This will display the Template selection screen. Click on the button to create a new template.

Select new value: Template										
۹ 🛛 🗙										
Name ~										
<b>•</b>										



3. You will then need to name the Template and assign Sub-Locations to it. Type PLANE in the name field, then click on the button near Assigned Sub Locations.

Select new value: Template											
Q X	Select new value: Template Name PLANE Assigned Sub Locations										

4. When you click on this button, you will see the sub-locations screen. If you do not have any sub-locations, you will need to create them. Like Templates, Sub-Locations are global and can be used in multiple templates. To create a sub-location, Type the name of the Sub-Location and press the **green Plus New** button.

Available Sub Locations	Assigned Sub Locations: PLANE
	•

- 5. For the PLANE Template, you will add the following sub-locations:
  - o Cockpit
  - o RWing
  - $\circ$  LWing
  - o Engine



0

# L5 Connect User Manual

Available Sub Locations	Assigned Sub Locations: PLANE
<b>Q</b>	
Cabin	
Cockpit	
Engine	
LWing	
RWing	+ +
$\odot$	

6. Once you have added all the sub-locations, you will see them in the list of Available Sub Locations. To assign a Sub-Location to the **Template**, select it from the list, then click the -> button. Again, all Sub-Locations are available for assignment throughout the system. You can also assign it to several different Templates simultaneously. Set all the Sub-Locations to the template PLANE. Remember, when assigning sub-locations, you do not need to assign all of them to a Template. Only assign what you need. Click the ✓ button when you have finished assigning all the sub-locations.

Select new value: Template											
Q X	Name PLANE										
Name	Assigned Sub Locations 🖉										
	Name Enable Work Order Entry										
	Cockpit										
	Engine										
	Cabin										

7. Notice that there is a checkbox on each sub location to enable work order entry. If this is checked and that sub-location is selected the user will also be forced to input a work order as well. See the section below on work orders for more information about how they work.



8. You now have created your template with sub-locations. Click the blue Save button to save it.



9. Click the green **Checkmark** button to assign the template to the **Prototype 0001** work location and then click the blue **Save** button to update the **Prototype 0001** work location with the new template.

5 Snap-on L5 Connect Admin Client, v:9.11.2.0802												o ×		
STATE	A	Top Level Change Current Location										Click to logout		
		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	History 2.0	Reports	Settings	1		
Name	Prototy Work L	ype 0001 ocation												
A R&D Lab     Prototype 0001	Info Profiles (Employee)	Profiles (Group)	Options 9	Subscription	Attachn	nents								
Tool Crib	Na Customer No	me Prototype ID PN123454	0001 \BC											
	Parent Locati	ion R&D Lab	2											
	Responsible Employ Templa	vee 🖉 🗙 ate PLANE	/ / ×											
	1	Tag 🧷 🗙	1											
Show Deleted Items														



#### Suppress Work Locations Prompt Options

This checkbox on the Location Options tab can be enabled to "skip" the devices' Work Location prompt. This will allow the user to log into the device without selecting an associated work location for any tool transactions made during that session.

45 Snap-on L5 Connect Admin Client, v:9.11.2.0802									- a ×
ATTEN	50	Top Level Change Current Location							
		Dashboard Loc	ations Tools	Tool States	Employees G	Groups His	story Reports	Settings	
Q =>									
Name *	Engine	Shop							
<ul> <li>✓ Harry's House of Helicopter Repai</li> <li>✓ Maintenance</li> </ul>	Organi	zational Location							
Brake Shop Calibration Lab	Info Profiles	Profiles Optio	ns Subscription	s Audit Type	es Quantity N	Monitoring	Attachments	Favorites	
Engine Shop	✓ Inherit options from	: Harry's House of H	elicopter Repair	_	_				
Flight Operations	Options	-	-						
<ul> <li>Helicopter Maintenance H</li> </ul>	English	Language							
Work Location 1	17-	Enable Wo	ork Order Entry						
Helicopter Maintenance H	Bar code scan prom	work Ord	er Entry UI Style						
<ul> <li>Helicopter Maintenance H</li> </ul>	Single Play	Audio Ale	rt Level						
Tool Box 1		Suppress	Work Locations Pro	ompt					
Plane Maintenance Hangar	Sun 1 : 00	AM Device We	ekly Reboot (Devi	ce Local Time)					
Plane Maintenance Hanga		0 Admin Se	sion Timeout (Min	utes)					
Plane Maintenance Hanga Plane Maintenance Hanga 4 Manufacturing	⊙ Optical To	olbox							
Assembly Area A	OPEID Cabi	not							
Assembly Area A Line 0 Assembly Area A Line 1		net							
Assembly Area A Line 2 Assembly Area B	⊙Tool Crib								
Assembly Area B Line 0 Assembly Area B Line 1 Assembly Area B Line 2	⊙ Portal								
Show Deleted Items	⊙Locker Hu	ıb							

NOTE: As of the current software version, 9.11.2.x, the Suppress Work Locations Prompt option must be disabled to use work orders. In future releases these two features will be able to be separated so that work orders can be turned on independently of work locations.

NOTE: More information on Location options can be found in the L5 Connect<sup>™</sup> Locations article.



#### Favorites

Sometimes in large L5 Connect systems, there can be many layers of organizational locations to navigate or so many work locations that the devices can't display them all on one screen. This can take multiple touches or scrolling to find a work location. Frequently used work locations can be designated as favorites and will always appear at the top of the list. Here is how to configure a work location as a favorite.

1. Log into the admin application and go to the **Locations** tab.

Snap-on L5 Connect Admin Client, v:9.11.2.0802										-	D X
Saman	Top Level			Change C	Current Location	n 🦾 S	SuperUser			Clic	k to logout
	Dashboard	Locations	Tools T	ool States	Employees	Groups	History	History 2.	0 Reports	Settings	
Name	Main Orga Profiles	tenance hizational Loca Profiles	ition	1		-				( <u> </u>	)
Calibration Lab	(Employee	(Group)	Options	Subscripti	ons Audit	Types	Quantity Mo	nitoring	Attachments	Favorites	
Engine Shop											
Helicopter Maintenance Hangar	Custom	ame Mainten	ance								
4 Helicopter Maintenance Hangar Bay 0	Custom	otes									
Helicopter Maintenance Hangar Bay 0		dias Tan Ian									
Helicopter Maintenance Hangar Bay 1	Parent Loca	tion Top Leve									
<ul> <li><sup>4</sup> Helicopter Maintenance Hangar Bay 2 Helicopter Maintenance Hangar Bay 2</li> </ul>	Responsible Empl	oyee 🖉 >	¢ I								
<ul> <li><sup>4</sup> Helicopter Maintenance Hangar Bay 3 Helicopter Maintenance Hangar Bay 3</li> </ul>											
Tool Box 1											
Plane Maintenance Hangar Plane Maintenance Hangar Bay 0											
Plane Maintenance Hangar Bay 1											
Plane Maintenance Hangar Bay 2											
Manufacturing											
R&D FlexHub											
▶ Tool Crib											
Show Deleted Items											

2. Select the organizational location that contains the device for which you would like to make a favorite and then click the **Favorites** sub-tab.

45 Snap-on L5 Connect Admin Client, v:9.11.2.0802		– a ×
Simo	Top Level Change Current Location	Click to logout
	Dashboard Locations Tools Tool States Employees Groups History	History 2.0 Reports Settings
Image: State	Top Level Organizational Location	
Brake Shop Calibration Lab	Info Profiles Profiles (Group) Options Subscriptions Audit Types Quantity Mon	nitoring Attachments Favorites
Engine Shop Engine Shop Flight Operations 4 Helicopter Maintenance Hangar Bay 0 Helicopter Maintenance Hangar Bay 0 4 Helicopter Maintenance Hangar Bay 1 Helicopter Maintenance Hangar Bay 1 4 Helicopter Maintenance Hangar Bay 2 Helicopter Maintenance Hangar Bay 3 Helicopter Maintenance Hangar Bay 3 Tool Box 1 Plane Maintenance Hangar Manufacturing R&D FlexHub Tool Crib Tool Crib Tool Crib Sol Crib Z93ER001	Name Top Level Customer ID Notes Parent Location	
Show Deleted Items		



3. Click the **New** button that looks like a green plus sign.

Snap-on L5 Connect Admin Client, v:9.11.2.0802										-	
Saman	Top Level Change Current Location										
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	History	2.0 Reports	Settings	]
Name Name Name Name Name Name Name Name	Top Orga fo Profiles (Employee ) Location Fa	Level nizational Loca Profiles (Group) vorites will ap	Ition Options	Subscripti	ons Audit	Types (	Quantity Mo	mitoring	Attachments	Favorites	

4. Select the work location that you would like to make a favorite, and then click the **OK** button that looks like a green checkmark.





5. Click the blue **Save** button to save the change.

Snap-on LS Connect Admin Client, V.9.11.2.0802											- U X		
Antonia	ן כ	Top Level SuperUser Click to logout											
	6	Dashboard	Locations	Tools	Tool States	Employees	s Groups	History	History	2.0 Reports	Settings		
Q =>									,				
Name		Top I Orga	L <b>evel</b> nizational Loca	tion						_			
<ul> <li>Iop Level</li> <li>Maintenance Brake Shop Calibration Lab Engine Shop</li> <li>Helicopter Maintenance Hangar</li> <li>Helicopter Maintenance Hangar Bay 0</li> <li>Helicopter Maintenance Hangar Bay 0</li> <li>Helicopter Maintenance Hangar Bay 1</li> <li>Helicopter Maintenance Hangar Bay 1</li> <li>Helicopter Maintenance Hangar Bay 2</li> <li>Helicopter Maintenance Hangar Bay 3</li> <li>Tool Box 1</li> <li>Plane Maintenance Hangar</li> <li>Manufacturing</li> <li>R&amp;D FlexHub</li> <li>Tool Crib</li> <li>Tool Crib West</li> <li>Z91BJ001</li> <li>Z93CR001</li> </ul>	Info	Profiles (Employee Location Fa avorites vel/Maintenance/h	) Profiles (Group) vorites will ap 4elicopter Mainter	Options pear at the	Subscript	tions Auc	dit Types	Quantity Mo lector screens	nitoring ( ngar Bay 3	Attachments <ul> <li>Inherited from</li> </ul>	Favorites		
Show Deleted Items													

6. You have now created a favorite work location that will show up on the first work location screen when a user attempts to log into one of the devices whose home location is the **Top Level**.

#### Tags on Locations

Work locations can have tags assigned to them. The tag is either a 1D or 2D barcode, or it can also be an RFID tag. This can be helpful when logging into an L5 Connect device that has a supported tag scanner attached. Instead of clicking the work location button on the screen, you can simply scan a tag of the work location instead.

45 Snap-on L5 Connect Admin Client, v:9.12.8.1219											- a ×		
Solar	$\overline{\mathbf{n}}$	Top Level Change Current Location											
		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings			
Name · · · · · · · · · · · · · · · · · · ·		ocation 1 ocation											
Brake Shop	Info Profiles	Profiles	Options	Subscriptio	ns Attachn	ients							
Engine Shop	(Employee)	(Group)											
Flight Operations	Na	me Work Loca	ition 1										
4 Helicopter Maintenance Han Helicopter Maintenance H	Customer ID CustomerId1												
Helicopter Maintenance H	No	Notes A location where tools will be used											
Helicopter Maintenance H 4 Helicopter Maintenance H	Parent Locat	ion Top Level	2										
Tool Box 1	Responsible Employ	ree 🖉 🗙	1										
Plane Maintenance Hanga	Tempi	ate 🖉 🗙											
Plane Maintenance Hanga	<b></b>	1000074				-							
Plane Maintenance Hanga		ag 1000071			<u> </u>	22							
Tool Crib East Manufacturing													
R&D Lab													
Tool Crib West													
Work Location 1													
Work Location 10													
Work Location 13													
Work Location 14													
Work Location 3													
<													
Show Deleted Items													


You can manually enter a tag value by typing it into the text box. This value must be unique in the system. You could also click the **Pencil** button and then scan the tag, using a supported tag scanner to import the tag value. Alternatively, you can click the **Auto generate value** button to have the system assign a generated tag value. Then you will need to click the blue **Save** button to save the change.

Tag	Auto generate value
<b>Tag</b> L000071	

Once you have a valid tag created, you can then use the print button to print that tag. This requires that you have previously installed and configured an L5 approved barcode printer for your system. Otherwise, the print button will not be enabled.





## Work Orders

Enabling work orders will require a user to either scan or manually input a text string that corresponds to a work order when logging into an L5 Connect device. This can be in addition to or in place of selecting a work location. There is also an option to create a specific "whitelist" of acceptable work order entries that the system will accept.

#### Device Usage

In this section we will show some examples of work order entry for the different **Work Order Entry UI Style** option values.

#### Bar Code Scan Prompt

This is the original version of work order support in the system. In this instance the user will be prompted to either select a work location or scan a work order. The work order can be of an alphanumeric format. Either selecting the work location or scanning a work order will satisfy the requirement and allow the user to complete the login process.

★ Helicopter Maintenance Hangar Manufacturing Maintenance A Top Level Work Loc	Top Level								
Bay 3 (0) (4) √	★ Helicopter Maintenance Hangar Bay 3 √	Manufacturing (0)	Maintenance (4)	A Top Level Work Loc √					



#### Touch Screen 10 Key

This version of work order entry will provide an on screen 10 key numeric keyboard and require that all work order values are numeric.

1. When prompted to enter a work location or work order, you can open the keyboard by pressing the button that looks like a keyboard.

Select Work Locatio	on / Scan Work Ord	Top Level	
★ Helicopter Maintenance Hangar Bay 3 √	Manufacturing (0)	Maintenance (4)	A Top Level Work Loc √

2. They would then enter work order value with the keyboard and press the **OK** button that looks like a green checkmark.

Enter Work Order							
123							
7	8	9					
4	5	6					
1	2	3					
✓ 0 CLR							



3. Assuming the whitelist feature is enabled and that value was on our list, the user was logged into the device.



4. If the whitelist feature was enabled and a value was entered that was not on the whitelist, the user will be warned of the invalid work order.





#### Touch Screen Full Keyboard

This version of work order entry supports full alphanumeric work orders like the with the addition of an alphanumeric keyboard for input.

Select Work Locatio	on / Scan Work Ord	Top Level	
★ Helicopter Maintenance Hangar Bay 3 √	Manufacturing (0)	Maintenance (4)	A Top Level Work Loc √

-	Enter Work Order									
	abc									
1	2	3	4	5	6 7	7 8	9	0		
q	w	e	r	t	У	u	i	ο	р	
АВС	а	s	d	f	g	h	j	k		
-	- z x c v b n m CLR									







#### Admin Setup

2.

Configuring work orders for your L5 Connect system is done through the admin application.

#### Turning On Work Orders

1. Log into the admin application and go to the **Locations** tab.

Snap-on L5 Connect Admin Client, v:9.11.2.0802									-	
	Top Level			Chapae Cur	rent Location	Sul	perUser		Clic	k to logo
MELEIL				sin ge sa						
	Dashboard	ocations	Tools To	ool States Er	nployees 0	Groups	History Histor	y 2.0 Reports	Settings	
Name v	<b>Top Lev</b> Organiz	<b>/el</b> ational Loca!	tion							
A Top Level Work Loc Maintenance Manufacturing R&D FlexHub	nfo (Employee)	Profiles (Group)	Options	Subscription	s Audit Typ	pes Qu	uantity Monitoring	Attachments	Favorites	
▷ Tool Crib Tool Crib West Z91BJ001 Z93CR001	Nar Customer Not	ne Top Level ID tes								
	Parent Locatio	on 🖉								
Show Deleted Items										
elect the <b>Options</b> sub-tab.	Top Level			Change Cu	rrent Location	Su	uperUser		- Cli	a ck to la
	Dashboard	Locations	Tools T	ool States E	mployees	Groups	History Histor	ry 2.0 Reports	Settings	)
Vame · · · · · · · · · · · · · · · · · · ·	<b>Top Le</b> Organiz	<b>vel</b> zational Loca	tion							
										Th.
Maintenance     Manufacturing     R&D FlexHub     Tool Crib	nfo Profiles (Employee)	Profiles (Group) : Top Level	Options	Subscription	Audit Ty	pes Q	uantity Monitoring	Attachments	Favorites	
Maintenance I Manufacturing R&D FlexHub Tool Crib Tool Crib West Z91BJ001 Z93CR001	nfo Profiles (Employee) Inherit options from Options English Bar code scan prom	Profiles (Group) : Top Level ~ La _ Er pt ~ W	Options anguage hable Work ( fork Order E	Subscription Order Entry entry UI Style	Audit Ty	pes Q	uantity Monitoring	Attachments	Favorites	
Maintenance Manufacturing R&D FlexHub Tool Crib West Z91BJ001 Z93CR001	nfo Profiles (Employee) Inherit options from Options English Bar code scan prom Single Play Sun <u>1</u> 1 00	Profiles (Group) :: Top Level La Er upt W An St AM ~ D	Options anguage hable Work ( fork Order E udio Alert Lu uppress Wor evice Weekly dmin Session	Subscription Order Entry intry UI Style evel rk Locations Pro y Reboot (Devi n Timeout (Mir	ompt ce Local Time;	pes Q	uantity Monitoring	Attachments	Favorites	

3. Check the **Enable Work Order Entry** checkbox and set the **Work Order Entry UI Style** pull down to the desired value.

⊙ Tool Crib

Show Deleted Items

0



- **Bar code scan prompt** Scan or input by keyboard any text string work order
- Touch screen 10 key On screen keyboard to input a numeric work order on a whitelist of approved work orders
- **Touch screen full keyboard** On screen keyboard to input an alpha-numeric work order on a whitelist of approved work orders



NOTE: More information on Location options can be found in the L5 Connect<sup>™</sup> Locations article.

4. Click the blue **Save** button.

5 Snap-on LS Connect Admin Client, v:9.11.2.0802										<u> </u>	o ×	
ATTATAT	Top Level Change Current Location										k to logout	
	Dashboard	Locations	Tools	Tool States	Employees	Group	s History	History 2.	0 Reports	Settings		
۹ 🔹										<b>\</b>		
Name	Top I Orga	Level nizational Loc	ation						_			
Top Level     A Top Level Work Loc												
Maintenance	Info Profiles (Employee	) Profiles (Group)	Optio	15 Subscrip	tions Audi	it Types	Quantity Mo	onitoring	Attachments	Favorites		
R&D FlexHub Tool Crib Tool Crib Vest	Inherit options from: Top Level     Options											
Z91BJ001 Z93CR001	English Language											
	Touch screen 10	cey v	Nork Orde	r Entry UI Styl	•							
	Single Play Audio Alert Level											
	Sun * 1 ;	00 AM + C	Device We	ekly Reboot (D	Prompt Nevice Local Ti	ime)						
		0 /	Admin Ses	sion Timeout (	Minutes)						- 11	
	⊙ Optical Toolbox											
	⊙RFID Cabinet											
	⊙ Tool Crib	,										
	⊙ Portal											
Show Deleted Items											Ŷ	

NOTE: As of the current software version, 9.11.2.x, the Suppress Work Locations Prompt option must be disabled to use work orders. In future releases these two features will be able to be separated so that work orders can be turned on independently of work locations.



#### Creating a Whitelist

You can create a whitelist of a specific set of work orders that you would like any attempted work order entry checked against. If the attempted work order does not appear on the whitelist the user will receive a warning that the value was not valid and have to retry the work order entry or not be granted access to the device.

1. To create a whitelist, log into the admin application and go to the **Settings** tab.

Snap-on LS Connect Admin Client, V.9.11.2.0802										-	U ^
	Top Level					🖉 🔊 s	uperUser				
	.op zere.			Chanae	Current Location	n 🖌 🍎 🕺				Clie	k to logout
	( <b>a</b>										
	Dashboard	Locations	lools	Iool States	Employees	Groups	History	History 2.0	Reports	Settings	L
Q =>											
About											
About Network Setup											
Sustem Configuration											
Diagnostics											
Local Settings											
Lotar settings											

2. Select the **System Configuration** listbox item on the left side of the screen, then click the **Work Order White List** button.

Antenan	Top Level			Change	Current Location	, 🍰 <sup>s</sup>	uperUser			Click	to logout
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	History 2.0	Reports	Settings	
About       Network Setup       System Configuration       Diagnostics       Local Settings				Work	Status Types Location Templa Verifications aintenance Types Units Audit Types k Order White Li	stes					

There are two options to add work orders to the whitelist at this point.



#### Manually Adding Work Orders to Whitelist

3. Click the **New** button that looks like a green plus sign.



4. Enter a work order in the box and then click the green checkmark **OK** button.

Enter Work Or	rder
С	

5. Repeat that process as many times as required to add all the desired work location values, then click the blue disk **Save** button.

Clear	Work Order White List	⇒∛⊘⊗
<b>Q</b>		×
12345		
67890		

**NOTE:** You can remove a work order from the list by selecting it and clicking the red minus sign **Delete** button. You can also delete all the work orders currently shown in the window by clicking the **Clear** button and then clicking the **Clear** button on the window that asks you if you are sure you want to delete all shown work orders from the whitelist.



#### Importing a Whitelist of Work Orders

You can also import a whitelist from an Excel file. NOTE: This will replace the current whitelist.

1. Click the **Import** button that looks like a page with a green arrow on it.

Work Order White List	$\textcircled{\begin{tabular}{ c c c c c } \hline \hline$
	×
4	
	Work Order White List

2. Click the **Continue** button when prompted if you want to overwrite the existing values.

Importing a new white list will overwrite existing values. Are you sure you want to continue?





3. You will see a file dialog window looking for an .xlsx file containing the list of whitelist work orders. Navigate to the proper directory and select your whitelist Excel file and then click the **Open** button.

45 Select: Spreadsheet										×
← → • ↑ 📕	> This F	C > Documents >	Work Orders			v ℃	Search	Work Orders		٩
Organize • New	folder							• •		?
📕 Log	^	Name	^	Date modified	Туре	Size				
📜 ToolCrib		WhiteList.xlsx		8/30/2024 8:49 AM	Microsoft Excel W		8 KB			
🦲 OneDrive										
🧢 This PC										
🧊 3D Objects										
E Desktop										
Documents										
🖊 Downloads										
👌 Music										
Pictures										
📕 Videos										
📢 OS (C:)										
🔫 engineering (\\	с									
🥩 Network	~									
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4. You will see a standard L5 Connect system data import window. Since there is only one column needed for the data, you will need to choose which column in your data represents the work order. Once you have selected the column that represents the work order fields, click the **OK** button that looks like a green checkmark. In this example the dataset only had one column with a header of Name.





6.

# L5 Connect User Manual

5. As you can see, the old manually entered whitelist has been replaced with the data from the imported file.

Clear Work Order White List	<b>8</b>
Q Remove visible items from the list	×
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User/Employee Configuration



#### Employees

This document will cover managing employees in the L5 Connect system. Employees are the user accounts used to control the access and administration of the L5 Connect system. Each Employee should have a separate account within the system that is not shared. This method allows for more precise auditing of the system. An employee account can either be a standard account or an admin account.

**Standard Account** – Is used for regular access to the L5 Connect<sup>™</sup> devices. Has no access to the Administrative Functions on any device and cannot log into the L5 Connect<sup>™</sup> Admin Client.

**Admin Account** – Admin accounts are standard accounts with additional permissions and a username & password. Admin accounts can access administrative functions on devices and log into the Administrative Clients.



## Employee attributes

Employee Attributes are the properties of an Employee Account and define who and what the Employee is and what they have access to. You can set all these attributes in the Info sub-tab of the Employee Tab.

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Show Deleted Items												

The attributes of the Employee are:

Last Name, First Name, and M. Initial – The name of the Employee. NOTE: The Last name field is required. Title – The courtesy title of the Employee (Dr., Mr., Mrs., Ms., etc.)

**Customer ID** – A unique code assigned to the Employee (Bin number, Employee ID, etc.) This ID can differentiate Employees with the same name. **NOTE: No two employees can have the same Customer ID.** 

**E-mail** – E-mail Address of the Employee. Used to send status notifications and reports (Subscriptions) to the Employee.

**Cell Phone** – Cellphone number of the Employee. Used to send status notifications and messages (Subscriptions) to the Employee. **NOTE: Cell Phone Number is currently only supported in the US. Carriers supported: AT&T, Verizon, Sprint, and T-Mobile.** 

**Home Location** – Employee's Location in the system. Please review the Locations section of this guide for more information.

**Language** – Set the text and audio language of the system for the Employee. When an employee logs into the machine, it will change the text and audio to match the currently selected language.

**Admin Login** – Set Employee as Administrator by creating a username and password. This setting is required if the Employee needs to access any administrative functions on any device or administrative clients. The username must be unique, and the password must be at least six characters long.

**Badge** – With an RFID badge scanner, assign a badge to the Employee for ATC Device access.

Temp Badge – With an RFID badge scanner, assign a badge that will expire based on your set time and date.

Photo - Set an image that will display on all devices when an employee logs in. This setting can act as an additional



form of identification to verify that no one is using someone else's account. You should use a square photo (equal dimension for length and width) no bigger than 1MB.

#### Creating an employee

Creating an employee requires that the user account creating the new Employee is an admin and that they have permission to add employees to the location they are adding them.

To begin, launch the Administration Client if it is not already running. Log in with your administration credentials. Once you have logged in, you should be at the main Dashboard. Click on the Employees tab.

On the bottom left of the Employees screen, click on the **New** button that has a green + icon.

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This button will open the New Employee Properties sub-tab.



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You will need to fill out all the attributes for the user from here. The following is some sample information you can use to practice. The Employee's name is John J. Smith. He has no title. His Employee ID is 12345ABC. He has the e-mail address of jjsmith@contoso.com. His cellphone is 555-123-9876, and AT&T is his carrier. He uses the standard system language and does not need administrative access. The Employee's primary work location is R&D Lab.

To set his **Home Location**, click the **Change** button that looks like a pencil.

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Supervisor Assembly Area B, Rachel										
Show Deleted Items										

This button will bring up the Location select screen. Select R&D Lab, then click on the  $\checkmark$  button. **NOTE: The Home** Location will default to the Current Location the Admin is working in. Please see the Locations section of this guide for more information.



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Perform one final check of the attribute data to ensure everything is correct. Once you are sure everything is right, click on the blue **Save** button in the top right of the screen.

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After you click save, the icons in the top right will disappear, and the Employee will show up in the list on the left.



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## Searching for an employee

If you have many employees in the system, L5 Connect<sup>™</sup> provides a quick and easy way to search and filter the list of employees. By utilizing the search function, you can quickly locate and administer employees. **NOTE: You will only be able to search for employees assigned to your current location and any sub-locations under it. If you attempt to search for an employee outside of your current location, you will not get any results for your search.** 

First, log into the Admin Client and go to the **Employees** tab to start a search. To quickly find the user you are looking for, you can use the search bar above the list of employees.

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Name ~										
Assembly Area A Line 0 Anne										
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Assembly Area A Line 1, Chris										
Assembly Area A Line 2, Amy										
Assembly Area A Line 2, Lisa										
Assembly Area A Line 2, Mike										
Assembly Area B Line 0, Dean										
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Assembly Area B Line 0, Sara										
Assembly Area B Line 1, Jess										
Assembly Area B Line 1, Jim										
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Helicopter Maintenance Hangar, Ali										
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Show Deleted Items										

Below the Search Bar is a pull-down. This pull-down will allow you to search for an employee using three different methods. These methods are:

- Name The name of the Employee can use first and last name to filter.
- **Customer ID** The Customer ID value of the Employee.
- Badge Search Scan a badge, and the Employee assigned to it will be the result.



Name	~
Name	
Customer ID	
Badge Search	_

#### Name and customer ID search

Go to the search bar, make sure the Name is selected and start typing the name. As you type the name John, the list will filter. Customer ID search works just like Name search, except you type in the Customer ID value instead of the name. The search bar is an active search, meaning that the list will filter as you type. Therefore, you do not need to type the full name or Customer ID of the Employee to get a result.





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Q 123 X										
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Smith, John J.										

#### Badge search

Badge Search requires that you have a compatible card reader to scan the user's Badge. Selecting **Badge Search** from the pull-down menu will cause a window to appear prompting you to scan the employee's badge. Upon completion of the scan, the user's information is displayed.

Scan user badge	-1



## Editing an Employee

When you need to make a change to an employee, you must edit the user account. To edit the employee, the admin must have permission to the employee's home location. For this example, we will add a photo to the user account with your sample employee. For information about managing badges on an employee see the Managing Employee Badges document.

First, log into the Admin Client and go to the **Employees** tab. Find the Employee by searching for it and click on the name to bring up the employee properties.

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Assembly Area A Line 0, James       Assembly Area B Line 1, Jess	Smith 12345	, <b>John J.</b> ABC								2	
Assembly Area B Line 1, Jim	Into Profiles	memberships	Subscription	s   Att	achments						
Helicopter Maintenance Hangar, Jen	Last Name Smit	h					Badge I	nfo —	7		
Plane Maintenance Hangar, Jerry	First Name John						Bad	ige 🖉 🗙			
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Smith, John J.	Title	ranc.					-				
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Show Deleted Items											

Once you have the Employee displayed, you can make any changes needed. Once done, make sure to SAVE the changes by clicking on the Save icon in the upper right of the screen. **NOTE: Until a change is made, you are not in edit mode and the SAVE and CLEAR buttons are visible.** 

You can add a photo to an Employee to better identify the user when they log into any device. Once added, this photo will show up anywhere in the system when that user logs in. Click on the **Change** button that looks like a pencil in the Photo box on the right side of the screen. **NOTE: It is recommended to use an image with a square aspect ratio (Same Dimensions for both Length and Width). Also, it is recommended to keep the file size of the image below 1MB.** 





When you click on the button, a file selection window will open. This file selection window is automatically filtered to file extensions supported by the system.

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File nam	< ne: pic1.jpg		<ul> <li>All Picture Fil</li> <li>Open</li> </ul>	es(*.jpg, *.png, *.gi ~ Cancel

Select the file you want to use as your picture and click open. You will now see the picture displayed in the **Photo** group box. Click the blue **Save** button to commit the change.



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Smith, John J.	Title Customer ID 1234 Email jjsmit	5ABC :h@contoso.con	1			[	Temp Bad	lge 🖉 🗙	J		
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You will notice the generic picture on the employee ID card changes to the new one you just added when you save.

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Assembly Area B Line 1, Jim	Info Profiles Memberships Subscriptions Attachments	
Helicopter Maintenance Hangar, Jen	Last Name Smith Badge Info	
Plane Maintenance Hangar, Jerry	First Name John Badge 2 ×	
Smith, John J.	Title	
	Customer ID 12345ABC	
	Email jismith@contoso.com	
	Cell Phone 5551239876 Carrier AT&T ~	
	Home Location R&D Lab 🖉	
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	r Admin Login	
	Create Login	
Show Deleted Items		

To remove the picture, click on the red  $\times$  in the Photo box, then SAVE. The employee picture will revert to the generic one.



45 Snap-on L5 Connect Admin Client, v:9.11.7.0923											– a ×		
STATE		Top Level Change Current Location							SuperUser				
		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings			
Assembly Area A Line 0, James	Smith 12345	, <b>John J.</b> ABC								2			
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Plane Maintenance Hangar, Jerry	First Name John						Bad	lge 🖉 🗙	]				
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Remember, the employee picture will display when this user logs into the system on any client or device.

## Setting an Employee as Admin

One person cannot do everything. For example, suppose you need to delegate administrative responsibilities to others. In that case, you can promote a standard account when you need more Admins. For more information on how to configure an employee as an admin, see the Authentication Configuration document.



## Deleting an employee

You can delete an account when an employee no longer needs access to the L5 Connect<sup>™</sup> system. When you delete the Employee, the system deactivates the user by clearing all permissions and badges assigned to that Employee. However, all other employee information remains for historical purposes. Also, if you decide to reactivate this user, it is easy to do so.

#### NOTE: Nothing in L5 Connect<sup>™</sup> is deleted, it is just made inactive. This is to ensure all history is preserved for audit and reporting purposes.

To delete an employee, you must open the Employees tab and find them in the user list on the left. Once you have the Employee selected, click on the red **Delete** button.

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Name       Assembly Area A Line 0, James       Assembly Area B Line 1, Jess	Smith 12345	, <b>John J.</b> ABC <b>Memberships</b>	Subscriptio	ns Att	achments						
Assembly Area B Line 1, Jim Helicopter Maintenance Hangar, Jen Plane Maintenance Hangar, Jerry	Last Name Smit First Name John	h			,	(	Badge II Bad	nfo ——	7		
Plane Maintenance Hangar, Joe Smith, John J.	M. Initial J Title	5400				[	Temp Bad	lge 🦉 🗙	j		
	Email jjsmi Cell Phone 5551			Photo –		]					
	Language Dev	ice Default				~					
	User Name j	jsmith	Cle	ear Login			Ø	, ×			
_											
Show to ded Items											

Click **Yes** to continue with the deletion when you are prompted with the "Are you sure" window.

Are you sure yo	u want t	to delete	Smith, John J. ?
	Yes	No	



The employee now disappears from the list of employees.

45 Snap-on L5 Connect Admin Client, v:9.11.7.0923										– o ×
ADEIDAID	Top Level			Change	e Current Location	, 🖉 Si	uperUser			Click to logout
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
Q, j										
Name										
Assembly Area A Line 0 James										
Assembly Area B Line 1, Jess										
Assembly Area B Line 1, Jim										
Helicopter Maintenance Hangar, Jen										
Plane Maintenance Hangar, Jerry										
Plane Maintenance Hangar, Joe										
Show Deleted Items										



## Restoring an employee

Suppose you have a returning user whose account has been deleted. In that case, you will need to restore the account.

To restore the deleted account, you need to be on the Employees tab and click the **Show Deleted Items** checkbox.



Your employee list changes and shows all deleted accounts at your current location or any sub-locations below.



15 Snap-on L5 Connect Admin Client, v.9.11.7.0923										- a ×
Antenan	Top Level			Change	e Current Location	s Si	uperUser			Click to logout
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
Smith X										
Name ~										
Smith, John J.										
Show Deleted Items										

Select the user you wish to reactivate, then click the **Restore** button.

45 Snap-on L5 Connect Admin Client, v:9.11.7.0923										– ¤ ×
ATTATA	Top Level	op Level Change Current Location								Click to logout
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
Smith X Name Smith, John J.	, John J. ABC	Iter	m is d	leactivat	ed. Click	resto	re to e	dit.		
Show Deleted Items										

The user disappears from the list of deactivated employees. Now you need to uncheck the **Show Deleted Items** checkbox.



45 Snap-on L5 Connect Admin Client, v:9.11.7.0923							- 🗆 ×
	Top Level		Character		SuperUser		Click to be well
Hall File	=///		Chang	e Current Location			Click to logout
	Dashboard	Locations	Tools   Tool States	Employees	Groups History	Reports Settings	
Smith       Name	Smith, John J. 12345ABC						
	Info Profiles Memberships	Subscriptions	Attachments				
	Last Name Smith			(	Badge Info ——	ו	
	First Name John				Badge 🗸 🗙		
	M. Initial				Temp Badge		
	Customer ID 12345ABC					J	
	Email jjsmith@contoso.co	h@contoso.com			Photo ———		
	Cell Phone 5551239876	Carrier A	т&т –				
	Home Location R&D Lab 🖉						
	Language Device Default			v			
	Admin Login						
	User Name jjsmith						
	Change Password	Clear	Login			]	
Show Deleted Items							

The user has been reactivated. **NOTE: The user's permissions and badges are cleared when it is deleted. You will need to reassign permissions and badges to the user after you have completed the restoration.** 



## Importing Employees from a Spreadsheet

If you have many users, adding them one-by-one can be time-consuming. To save time, L5 Connect<sup>™</sup> can import a list of users into the system. By using an excel file (xlsx), you can import all your users at once.

The tool properties that can be imported are: **Badge** - The full hexadecimal value read from the HID badge of the employee **Customer ID** - A unique customer supplied identifier for that employee **E-mail** - E-mail address of the user to be used for system notifications **First Name** - First name of the user **Last Name** - Last name of the user (This field is required) **M. Initial** - Middle initial of the user **Title** - Title of the user **Username** - username of user (if he is an Admin)

Once you have your file of employees ready, click on the **Import** button at the bottom left of the Employees tab.

45 Snap-on L5 Connect Admin Client, v:9.11.7.0923		– o ×
STATE	Top Level Change Current Location	Click to logout
	Dashboard Locations Tools Tool States Employees Groups History Reports Settings	
Name     Assembly Area A Line 0, Anne	Smith, John J.	
Assembly Area A Line 0, Gene Assembly Area A Line 0, James Assembly Area A Line 0, Steve	Info Profiles Memberships Subscriptions Attachments Last Name Smith Badge Info	
Assembly Area A Line 1, Becca Assembly Area A Line 1, Ben Assembly Area A Line 1, Chris	First Name John     Badge 2 ×       M. Initial J     Temp Badge 2 ×	
Assembly Area A Line 2, Amy Assembly Area A Line 2, Lisa	Customer ID 12345ABC Email jjsmith@contoso.com Photo	
Assembly Area A Line 2, Mike Assembly Area B Line 0, Dean Assembly Area B Line 0, Liv	Cell Phone 5551239876 Carrier AT&T ~ Home Location R&D Lab	
Assembly Area B Line 0, Sara Assembly Area B Line 1, Jess Assembly Area B Line 1, Jim	Admin Login	
Assembly Area B Line 1, Opal Assembly Area B Line 2, Art	User Name Jismith Change Password Clear Login	
Assembly Area B Line 2, 60 Assembly Area B Line 2, Kim Helicopter Maintenance Hangar, Ali		
Helicopter Maintenance Hangar, Ed Helicopter Maintenance Hangar, Fre Helicopter Maintenance Hangar, Ge		
Show Deleted Items		



This will open a file dialog window. Browse to the location of the file. Once you have selected it, click Open.

← → × ↑ 🖡 → T	his PC > Local Disk (C:) > New folder	v U 🖉 s	earch New folder
Organize * New fol	der		jii • 🔟 🕐
Ouick access	Name	Date modified	Type Siz
<ul> <li>This PC</li> <li>3D Objects</li> <li>Desktop</li> <li>Documents</li> <li>Downloads</li> <li>Music</li> <li>Pictures</li> <li>Videos</li> <li>Local Disk (C:)</li> </ul>	True-Site Employere Import Template.xlsx	3/16/2022 3:59 PM	Microsoft Excel Work
🕳 GAMES (D:) File n	< arme: True-Site Employere Import Template.xlsx	Excel fil     Or	es (xlsx) (*.xlsx) V pen Cancel

Once open, the import window will display. Use the pull-downs to match the data in the columns with the Employee attribute to which it needs to be assigned.

		2	_		Тор	Level	Change	Current	Super	User		Click to losout
	Select Header Row (Double-Click) Identify Column (Drop-Down Menu)											
0	Badge		Customer ID	Email	First Name	Last Name	M. Initial	Title	Username	Column8	Column9	Column10
Na	×		~	*	~	~	*	*	*	~	Ý	~
			Customer ID	Email	First Name	Last Name	M. Initial	Title	Username			
Badg	ge -	f the user	Uniquie ID (if needed)	Email address of user	First Name of user	Last Name of user	Middle initial of user	Title of user	username of user (If Admin)			
Cust	omer ID											
Emai	il 🛛											
First	Name											
Last	Name											
M. In	nitial											
Title												
User	Name											
	Show	Deleted It	ems									

Once you have matched all the columns with an attribute, click the  $\checkmark$  button in the top left to start the import. Once complete, the users will be in the system. **NOTE: You will still need to assign these employees profiles at appropriate locations in the L5 Connect system as needed.** 



## E-mail and text

For the L5 Connect<sup>™</sup> service to send out any messages, you must configure L5 Connect<sup>™</sup> to use a valid e-mail server and texting service. L5 Connect<sup>™</sup> uses SMTP for e-mail and text. For more information on configuring SMTP in L5 Connect<sup>™</sup> use the How to Setup SMTP Configuration document.

#### **Configuring E-mail**

You need to add at least one e-mail to the Employee so they can receive the notifications. You can set an Employee to have multiple e-mails separated by semi-colons.

#### Configuring text messaging

Text Messaging is configured on a per-employee basis and defined in the employee **Info** Sub-tab. First, input the number, including area code and without dashes (ex.555555555), and select the carrier to which the number belongs. Remember that currently, texting only works for US phone numbers.

45 Snap-on L5 Connect Admin Client, v:9.11.7.0923		- 0 ×
STATE	Top Level Change Current Location	Click to logout
	Dashboard Locations Tools Tool States Employees Groups History Reports Settings	
Name     Image: Second se	Smith, John J. 12345ABC	
Assembly Area A Line 0, Gene	Info Profiles Memberships Subscriptions Attachments	
Assembly Area A Line 0, Steve	Last Name Smith Badge Info	
Assembly Area A Line 1, Becca	First Name John Badge 🖉 🗙	
Assembly Area A Line 1, Ben	M. Initial J	
Assembly Area A Line 1, Chris	Customer ID 12345ABC	
Assembly Area A Line 2, Lisa	Email jismith@contoso.com	
Assembly Area A Line 2, Mike	Cell Phone 5551239876 Carrier AT&T	
Assembly Area B Line 0, Dean		
Assembly Area B Line 0, Liv		
Assembly Area B Line 0, Sara	Language Device Default	
Assembly Area B Line 1, Jess	Admin Login	
Assembly Area B Line 1, Jim	User Name jjsmith	
Assembly Area B Line 1, Opan Assembly Area B Line 2, Art	Change Password Clear Login	
Assembly Area B Line 2, Bo		
Assembly Area B Line 2, Kim		
Helicopter Maintenance Hangar, Ali		
Helicopter Maintenance Hangar, Ed		
Helicopter Maintenance Hangar, Fre		
Helicopter Maintenance Hangar, Ge		
Show Deleted Items		



#### Groups

Groups allow an administrator to easily assign permissions to a set of Employees who are members of a group instead of setting those permissions on each Employee individually. This simplifies access management as you can move Employees out of a group if they no longer need the group's permissions. For example, an employee belongs to the Administrators group but is transferred to the Auditing team. Suppose you move that Employee out of the Administrators group and into the Auditors group. In that case, their permissions will be automatically changed to reflect their new role.

You should set permissions to groups and then assign users to those groups, as setting permissions on Employees can become challenging to manage if you have many users.


## Creating a Group

To create a group, you will need to have the appropriate administrative permissions for the location you wish to make the group. Once you have determined you have the appropriate permissions, you are ready to begin.

For this example, you need to create a group for the Maintenance Team within the Maintenance Location.

Click on the Groups Tab to bring up the Groups screen in the Administration Client. Then, on the bottom left of the Groups screen, click on the green **New** button. This will open the Group settings window.

5 Snap-on LS Connect Admin Client, v:9.11.7.0923									- a ×
ATTENATIO	Top Level			Change	Current Location	Supe	erUser		Click to logout
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History Rep	orts Settings	
G 🛛									
Name ~									
ATC Team Supervisors									
Show Deleted Items									

In the Name textbox, enter the desired name of the group. For this example, you will be creating a group for your Maintenance team, so you set the **Name** to **Maintenance**. **Note: Group names must be unique**.

15 Snap-on L5 Connect Admin Client, v:9.11.7.0923										- 0 ×
Gazara	Top Level			Change	Current Location	su Su	iperUser			Click to logout
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
۹ × ۲		5			n - 197 - 197 - 197					<b>M</b>
Name -										
ATC Team Supervisors	Members Sub	ecriptions								
Name Main	ntenance	scriptions								
Home Location Top	Level 🖉									
Show Deleted Items										

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Next, set the Home Location by clicking on the **Change** button that looks like a pencil to open the location selection screen. Select the location where you want to place the group. In this case, the group represents the Maintenance team, so you want to place it at the Maintenance location. Once you have the Location highlighted, click on the green check at the bottom to confirm the Location. When creating a group, the Home Location will default to your Current Location. For more information, please see the L5 Connect<sup>™</sup> Locations document.

Select home location	
4 Top Level	
Maintenance	
Brake Shop	
Calibration Lab	
Engine Shop	
Flight Operations	
<ul> <li>Helicopter Maintenance Hangar</li> </ul>	
Helicopter Maintenance Hangar Bay 0	
Helicopter Maintenance Hangar Bay 1	
Helicopter Maintenance Hangar Bay 2	
Helicopter Maintenance Hangar Bay 3	
Plane Maintenance Hangar	
Plane Maintenance Hangar Bay 0	
Plane Maintenance Hangar Bay 1	
Plane Maintenance Hangar Bay 2	
Plane Maintenance Hangar Bay 3	
<ul> <li>Manufacturing</li> </ul>	
<ul> <li>Assembly Area A</li> </ul>	
Assembly Area A Line 0	
Assembly Area A Line 1	
Assembly Area A Line 2	
<ul> <li>Assembly Area B</li> </ul>	
Assembly Area B Line 0	
Assembly Area B Line 1	
Assembly Area B Line 2	
Final Assembly Area	
R&D Lab	
Tool Crib East	
Tool Crib West	
Z98AT001	
Z98BT001	
Z99LS001	
748RT001	

Click the blue **Save** button to finish creating the group.

45 Snap-on L5 Connect Admin Client, v:9.11.7.0923			-								- a ×
STORIO	$\overline{a}$	Top Level			Change	Current Locatio	on 🍰 Su	iperUser			Click to logout
		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
Q. X	4.0										
Name -											
ATC Team Supervisors	Info Profiler	Mambar	herminitions								
	Name Main	tenance	uscriptions								
	Home Location Main	ntenance 🖉									
Show Deleted Items											

You will see the newly created group listed on the group List on the left side of the screen.



## Editing a Group

To edit a group, you need to select it, make any required changes, and then click the SAVE button.

NOTE: The save and cancel icons will not appear until you make a change to the group.

# Adding/Removing Employees to a Group

Select the Members sub-tab on the Groups tab to add an Employee to the group. Find the Employee you want to add to the group from the list, then check the Is Member check box. Add John J. Smith to the Maintenance group.





Click on the blue **Save** button to save our changes.

Image Current Location       SuperViser       Click to logo         Name       Image Current Location       Tool States       Employees       Groups       History       Reports       Settings         Name       Image Current Location       Naintenance       Nain	Snap-on L5 Connect Admin Client, v:9.11.7.0923										- 🛛 ×
Change Current Location       Click to logo         Dashboard       Locations       Tools       Tool States       Employees       Groups       History       Reports       Settings         Name       ATC Team       Maintenance       Maintenance       Subscriptions       Attachments       Click to logo       Click to logo         Supervisors       Of Profiles       Members       Subscriptions       Attachments       Click to logo       Click to logo         Helicopter Maintenance Hangar, fal       Infelicopter Maintenance Hangar, fal       Infelic		Top Level					🖉 s	uperUser			
Dashboard       Locations       Tools       Tools <thtools< th="">       Tools       Tools</thtools<>	ATTE THETH				Change	Current Locatio	on 🥭				Click to logout
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Name   Art Team   Maintenance   Supervisors     Info   Pofiles   Supervisors	2	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
Name   ATC Team   Maintenance   Supervisors     Info   Pofiles   Members   Subscriptions   Attachments     Info   Pofiles   Members   Subscriptions     Info   Pofiles   Members   Subscriptions     Info   Pofiles   Members   Subscriptions   Info   Pofiles   Members   Subscriptions   Attachments   Info   Pofiles   Members   Subscriptions   Info   Pofiles   Members   Subscriptions   Info   Pofiles   Members   Subscriptions   Members   Info   Pofiles   Members   Subscriptions   Members   Info   Pofiles   Members   Info   Pofiles   Info   Pofiles   Info   Pofiles   Info   Info <t< th=""><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>-</th><th></th></t<>										-	
Name     Maintenance       ATC Toam     Info       Maintenance     Info       Supervisors     Info       Porfiles     Members       Subscriptions     Attachments       Info     Porfiles       Members     Isbscriptions       Assembly Area B Line 2, Rim     Info       Helicopter Maintenance Hangar, Fel     Info       Helicopter Maintenance Hangar, Kat     Info											
ATC Team  Maintenance Supervisors	Name 🔰 🔟 📈 Ma	aintenance									
Info       Profiles       Members       Subscriptions       Attachments         Supervisors	ATC Team										
Info     Porfiles     Members     Subscriptions     Attachments       Supervisors          © Employee         © Is Member         Assembly area B Line 2, Bin         Assembly area B Line 2, Rin         Helicopter Maintenance Hangar, Ed         Helicopter Maintenance Hangar, Ed         Helicopter Maintenance Hangar, Ed         Helicopter Maintenance Hangar, Kerge         Helicopter Maintenance Hangar, Kerg         Helicopter Maintenance Hangar, Kerge         Helicopter Maintenance Hangar, Kerg         Helicopter Maintenance Hangar, Kerg	Maintenance	~		~							
Supervisors       Supervisors          © Employee <ul> <li>Assembly Area 8 Line 2, 80</li> <li>Assembly Area 8 Line 2, 80</li> <li>Assembly Area 8 Line 2, 80</li> <li>Helicopter Maintenance Hangar, Ali</li> <li>Helicopter Maintenance Hangar, Fed</li> <li>Helicopter Maintenance Hangar, Kerge</li> <li>Helicopter Maintenance Hangar, Kerge</li> <li>Helicopter Maintenance Hangar, Kerge</li> <li>Helicopter Maintenance Hangar, Kerge</li> </ul>	Info Profiles	Members Sub	oscriptions	Attach	nents						
Assembly Area B Line 2, Bo	Supervisors   Employe	e	🕑 İs I	Member							
Assembly Area 8 Line 2, Kim	Assembly Area	B Line 2. Bo	-		~						
Helicopter Maintenance Hangar, Rd         Helicopter Maintenance Hangar, Fed         Helicopter Maintenance Hangar, George         Helicopter Maintenance Hangar, Kan         Helicopter Maintenance Hangar, Kat         Helicopter Maintenance Hangar, Kat	Assembly Area	B Line 2, Kim									
Helicopter Maintenance Hangar, Ed       Helicopter Maintenance Hangar, Fred       Helicopter Maintenance Hangar, Kan       Helicopter Maintenance Hangar, Kan       Helicopter Maintenance Hangar, Kan       Helicopter Maintenance Hangar, Kan	Helicopter Mair	tenance Hangar, Ali									
Helicopter Maintenance Hangar, Fred  Helicopter Maintenance Hangar, George  Helicopter Maintenance Hangar, Jann  Helicopter Maintenance Hangar, Kate  Helicopter Maintenance Hangar, Kate  Helicopter Maintenance Hangar, Kate	Helicopter Main	tenance Hangar, Ed									
Helicopter Maintenance Hangar, George	Helicopter Main	tenance Hangar, Fred									
Helicopter Maintenance Hangar, Kat  Helicopter Maintenance Hangar, Kat  Helicopter Maintenance Hangar, Kat	Helicopter Mair	tenance Hangar, George									
Helicopter Maintenance Hangar, Kate	Helicopter Mair	ntenance Hangar, Jen									
Helicopter Maintenance Hangar, Ted	Helicopter Mair	tenance Hangar, Kate									
	Helicopter Mair	stenance Hangar, Ted									
Helicopter Maintenance Hangar, Tom	Helicopter Main	tenance Hangar, Tom									
Plane Maintenance Hangar, Alice	Plane Maintena	nce Hangar, Alice									
Plane Maintenance Hangar, Gerald	Plane Maintena	nce Hangar, Gerald									
Plane Maintenance Hangar, Gina	Plane Maintena	nce Hangar, Gina									
Plane Maintenance Hangar, Harold	Plane Maintena	nce Hangar, Harold		<u> </u>							
Plane Maintenance Hangar, Harry	Plane Maintena	nce Hangar, Harry									
Plane Waintenance Hangar, Jerry	Plane Maintena Blane Maintena	nce Hangar, Jerry									
Printe Waintcenance Francia, 200	Plane Maintena Plane Maintena	nce Hangar, Joe		-							
Pine Maintenance Hanag Polin	Plane Maintena Plane Maintena	nce Hangar, Presion									
Saith John 1	Smith John J	ice nangai, noom									
SuperUser	SuperUser										
SuperViewer	SuperViewer										
Supervisor Assembly Area A, Polly											
Supervisor Assembly Area 8, Rachel	Supervisor Asse	mbly Area A, Polly									
Supervisor Helicopter Maintenance Hangar, Liz	Supervisor Asse Supervisor Asse	mbly Area A, Polly mbly Area B, Rachel									
Show Deleted Items Supervisor Plane Maintenance Hangar, Ina	Supervisor Assa Supervisor Assa Supervisor Heli	mbly Area A, Polly mbly Area B, Rachel copter Maintenance Hangar	ır, Liz								

If you have many users, you can filter the list by clicking on the Filter button.

Employee  Enter filter text (Use filter keywords (AND)	Is Member (OR) to search for mu	litiple terms )
Asse		
Assembly Area B Line 2, Kim		
Helicopter Maintenance Hangar, Ali		

You can then start typing a name, and the list will automatically filter based on the text in the box. To clear a filter, click the **Clear Column Filters** button on the left side of Employee Name.

₹	Semployee	🕑 Is Member
	Plane Maintenance Hangar, Joe	
	Smith, John J.	



To remove an employee from the group, uncheck the **Is Member** checkbox by their name.

Alternatively, you could add an employee to a group from the **Employees** tab. On the Employees tab you would select the employee you wish to add to the group and then select the **Memberships** sub-tab.

45 Snap-on L5 Connect Admin Client, v.9.11.7.0923	10					- a ×
Saman	Top Level		Chang	e Current Location	SuperUser	Click to logout
	Dashboard	Locations	Tools Tool States	Employees	Groups History Rep	orts Settings
C joh x Name Smith, John J.	th, John J. SABC					2
Info Profiles	Memberships	Subscriptions	Attachments			
Last Name Sm	ith			C.	Badge Info	
First Name Joh	in				Badge 2 X	
M. Initial J					Temp Badge	
Title					temp badge	
Customer ID 12:	45ABC			r	Photo	
Cell Phone 55	1239876	Carrier A	T&T ~			
Home Location R8	D Lab 2					
Language De	vice Default					
Admin Login -						
User Name	Jjsmith			i]]		
Change Password		Clear	Login			
Show Deleted Items						

Then find the group to which you want to add the employee and check the **Is Member** checkbox.

45 Snap-on L5 Connect Admin Client, v:9.11.7.0923										– ¤ ×
Simon	Top Level			Change	e Current Location	s 🖉	iuperUser			Click to logout
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
Q joh	John J									
Name 12345/	ABC								_	
Smith, John J.										
Info Profiles I	Memberships	Subscriptio	ons At	tachments						
⊙ Group ⊙ I	s Member									
ATC Team										
Maintenance Supervisors										
Show Deleted Items										



Finally, click the blue **Save** button.

45 Snap-on L5 Connect Admin Client, v:9.11.7.0923											– a ×
STATE	50	Top Level			Change	Current Location	, 🍰 s	uperUser			Click to logout
Diep		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
💊 joh 🗶											
Name	Smith 12345.	, <b>John J.</b> ABC									$\mathbf{A}$
Smith, John J.				Υ <b>•</b> ••							•
	Info Profiles	Memberships Is Member	Subscription	ns Atta	achments						
	ATC Team Maintenance										
	Supervisors										
Show Deleted Items											



## Deleting a Group

When a group is no longer needed, you can remove that group from the system. To delete the group, make sure you are on the Groups Tab. Then select the group you want to delete from the list on the left side, then click on the red **Delete** button at the bottom of the list.

45 Snap-on L5 Connect Admin Client, v:9.11.7.0923											- o ×
STATE	$\overline{n}$	Top Level			Change	Current Location	Su 🖉	perUser			Click to logout
	B	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
9. X	6.6										
Name ·	Mainte	enance									
Maintenance	Duefiles 1	Manahana ( Cu	hanintiana	Attack							
Supervisors	Name Main	itenance	IDSCRIPTIONS	Attachm	ents						
Но	me Location Main	ntenance 🖉									
Show Deleted Items											

You will then be prompted to confirm that you want to delete this group. Click Yes.

Are you sure y	ou want	to delete	Maintenance?
	Yes	No	

The group has now been deleted.



#### Restoring a Deleted Group

When you delete a Group, it is not removed from the system. Instead, it is deactivated to preserve event history. To restore the group, you must check the **Show Deleted Items** on the main group page found under the group list on the left side.



Once you have checked the box, you will see all groups that have been deleted. **NOTE: If you are not at the top** level of the location tree, you will not see all deleted groups. You will only see groups at your current level and any sub-location levels.

15 Snap-on L5 Connect Admin Client, v:9.11.7.0923										- a ×
Simon	Top Level			Change	Current Location	Su Su	perUser			Click to logout
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
۹										
Name time t	team									
Maintenance	·····									
Info Profiles I	Members Su	bscriptions	Attachm	nents						
Home Location Ton	Level									
Tome Excition Top I										
Show Deleted Items										



Select the group you want to restore, click on the green **Restore** button.

45 Snap-on L5 Connect Admin Client, v:9.11.7.0923										– a ×
ATTATA	Top Level			Change	Current Location	Sup	perUser			Click to logout
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
Name Maint	enance	Ite	m is d	eactivat	ed. Click i	restor	e to e	dit.		
Show Deleted Items										

Uncheck the Show Deleted Items checkbox to see the active groups list.





Your group has been restored.

45 Snap-on L5 Connect Admin Client, v:9.11.7.0923										- o ×
Saman	Top Level			Change	Current Locatio	n St	uperUser			Click to logout
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
Name ATC Team Maintenance Supervisors										
Show Deleted Items										

NOTE: When a Group is deleted, all assigned profiles, permissions, and members are cleared. When it is restored, these will need to be added back manually.



#### **Default and Custom Profiles and Permissions**

With Locations, you can logically organize L5 Connect<sup>™</sup> resources to make managing and delegating tasks and assignments much easier. But how do you determine what a specific Employee can and cannot do within a particular location? That is where Profiles come into play.

A **Profile** is a set of pre-configured permissions that can be assigned to either Employees or Groups and is used to define a job role within the system.

Permissions are organized into categories. Each category will have a list of actions that you can grant to a profile. These categories are:

- **Employees** Permissions for managing employee access
- **Locations** Permissions for managing location objects
- **Groups** Permissions for managing groups
- **Devices** Permissions for L5 Connect<sup>™</sup> Devices
- Status Permissions for the Device States and Status
- System Configuration Permissions for Global L5 Connect<sup>™</sup> Configuration
- Tools Permissions for tools
- **Reports** Permissions for custom and built-in reports

You can see the complete list of permissions in the Complete Permissions List.

#### **Default Profiles**

There are already five built-in profiles in the system. These Profiles are:

- **SUPERUSER** This Profile is granted every permission in the system. It is usually reserved for the IT or Technical Engineer in charge of the system. This is the only default profile that can make system-level changes. To function correctly, an Employee with admin access must be assigned this Profile at the Top Level of the Location Tree.
- **SUPERVIEWER** This Profile is granted all visibility permissions but cannot make any changes. This role is helpful for management that wants to see everything but does not plan on administration of the system.
- **ADMINISTRATOR** This Profile is granted most administrative permissions but cannot make system-level changes. This role is reserved for an area or department supervisor who needs complete control of the users and devices in specific locations.
- **MAINTENANCE** This Profile is granted limited administrative permissions to devices and reports. This role is designed for the maintenance team to keep the L5 Connect<sup>™</sup> devices working online.
- **SYSTEM USER** This Profile is granted the basic permissions to the system, with no access to administrative functions. This role allows a user to access ATC Devices in a location for tool issues and returns.

#### NOTE: These default Profiles cannot be edited or deleted.



### **Custom Profiles**

The five default profiles should cover most roles needed to operate L5 Connect<sup>™</sup> in an organization. Yet sometimes you may have a specific job role in your organization that the default profiles do not cover. In such cases, you need to create your own custom set of permissions by creating a Custom Profile. For

example, your company needs a profile with more permissions than the Standard user but not an Administrator. You want to call this role Power User. This will require you to make a new Profile, as none of the built-in ones will fulfill this need.

#### Creating the Custom Profile

1. Creating a Profile is done within the Profile Permission Editor. To access the editor, you must click on the Settings Tab in the L5 Connect<sup>™</sup> Admin Client. Once there, on the left side of the screen, expand System Configuration, then select Profile Permissions.





2. On this screen, you will see all the current profiles in the system. Right now, you only have the default available. To create the new custom profile, you will need to select one of the defaults that match your needs as closely as possible. In this case, you will be creating our custom profile based on the System User Profile. Click the + icon under System User. This will create a copy of the System User profile that you can modify.

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	re-		Dashi	board	Los	ations	To	ols	Tool 1	itates		
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Profile Permissions	g Status	Sentern Uber	Variance	Administrator	SupelViewn	Suprilie						
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	- System C Dashi	Configuration		oution	Syntown Lines	Maintenator -	Absistator	Superviewer	SuperDire -	System User	-	
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	Disgnor	1103	.8-	den a	Stream mean.	Manufacture	Advergence.	Supervision -	Sugar Quer	lateral.		

3. Rename the Profile to **Power User**, then click on the **Blue save** button.

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		- ,	Dashb	oard	Locat	ions	100	ts .	Tool States
	-		Employe	es	Groups	Hist	ory	Report	ts Settings
=>	Profile Permiss	ions Edito	w					-	→🥙 🥝
About	Name	System User	Maintenance	Administrator	SuperViewer	SuperUser	Power User		
Network Setup	@ Implanes	Contem Lines -	Minteres a	Administrative .	Constituent in	Constitute of	diring		
<ul> <li>System Configuration</li> </ul>	@ Locations	System User	Maintenance V	Administrator	Superviewer -	Superior -	Section User		
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Issued Tool Past Due	@ Devices	Suttern Liver	Maintenance V	Administrator 1	SuperViewer 1	Superliker V	System User		
Profile Granting	· Status	System Liver	Maintenance	Administrator	SuperViewer 1	SuperDuer *	System User		
Profile Permissions	System Configuration	System Liser -	Maintenance	Administrator	SuperViewer 1	SuperDuer -	Nonel		
Tracking Bags	@ look	System User	Maintenance	Administrator :	SuperViewer **	SuperUser ~	System User		
Diagnostics	@ Reports	System User	Maintenance ~	Administrator :	SuperViewer 1	SuperDuer	[None]		



4. You will be presented with a message box informing you that the new Profile must be set in the Profile Granting screen before use. More information about Profile granting will be later in this section. Click **OK**.

Warning: You must configure all new profiles on the Profile Granting screen before use.



5. The Profile is now created. Right now, it's just a copy of System User; you need to customize the permissions to reflect the role you want this Profile to serve.

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About Network Setup	Name	Power User	System User	Maintenance	Administrator	SuperViewer	SuperCoar		
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Device Global Settings	⊗ Locations	System User	System User	Maintenance	<ul> <li>Administrator ~</li> </ul>	SuperViewer	SuperUser	×.	
Issued Tool Past Due	@ Groups	System User	<ul> <li>System User III</li> </ul>	Maintenance	<ul> <li>Administrator</li> </ul>	SuperViewer	SuperUser	× .	
Profile Granting	@ Devices	System User	System User	Maintenance	<ul> <li>Administrator</li> </ul>	SuperViewer	<ul> <li>SuperUser</li> </ul>	×.	
Profile Permissions	🛞 Status	System User	System User	Maintenance	<ul> <li>Administrator ::</li> </ul>	SuperViewer	<ul> <li>SuperLiser</li> </ul>	×.	
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Diagnostics	@ Tools	System User	System User	Maintenance	<ul> <li>Administrator 1</li> </ul>	SuperViewer	<ul> <li>SuperUser</li> </ul>	· ·	
Local Settings	@ Reports	(None)	System User	Maintenance	<ul> <li>Administrator</li> </ul>	SuperViewer	SuperUser	· ·	



6. Click on the **pencil** icon for **Power User** to enter edit mode.

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Device Global Settings	e Groups	System User	* System User	Maintenance	· Administrator ·	SuperViewer	· Superline	· ··	
Issued Tool Past Due	Devices	System User	* System User	Maintenance	· Administrator ·	SuperViewer	· · · SuperUse	· * .	
Profile Granting	🕀 Satur	System User	* System User	Maintenance	<ul> <li>Administrator 1</li> </ul>	SuperViewer	· · · SuperUse	· * .	
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Diagnostics	Reports	(None)	* System User	Maintenance	<ul> <li>Administrator</li> </ul>	SuperViewer	· · SuperUse	· ~ .	
Diagnostics E Local Settings									

7. When in edit mode, you can only change the currently selected Profile. Give this user the ability to add employees and update their badges. You do not want them to grant admin access, nor do you want them to give out Temp Badges. All other permissions should be the same as System User. So, the new permissions should look like this. Click the **Blue save** button to commit the changes.

FILE	nati	Top Lev	el	Change	Current Locat	ion 🍃 Surj	perUser	Click to logout
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۹	Profile Permission	ns Editor						<b>M</b>
About	Name	Power User	System User	Maintenance	Administrator	SuperViewer	SuperUser	
<ul> <li>Network Setup</li> <li>Surtem Configuration</li> </ul>	⊕ Employees	(Custom) +	System User	Maintenance -	Administrator	- SuperViewer -	SuperUser ~	
Dashboard	Add/Remove	2			2		2	
Device Global Settings	Admin Client Access Edit				×.		2	
Issued Tool Part Due	Badge Edit	×.			2		2	
Profile Granting	Contact Info Edit	×.			4		1	
Profile Dermissions	Contact Info View	2			4	2	2	
Traching Page	info Edit	2			2		×	
Tracting Bags	Info View	2			2	2	¥	
User Defined Fields	Photo Edit	2			1		×	
Diagnostics	Temp Badge Edit				1		×	
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	⊕ Groups	System User	System User	Maintenance 1	Administrator	SuperViewer	SuperUser ~	
	Devices	System User	System User	Maintenance 1	Administrator	SuperViewer	SuperUser ~	
	🛞 Satus	System User -	System User	Maintenance 1	Administrator	SuperViewer	SuperUser ~	
	System Configuration	(None) *	System User	Maintenance 1	Administrator	SuperViewer	SuperUser *	
	@ Tools	System User	System User	Maintenance 1	Administrator	SuperViewer	SuperUser ~	
	Reports	(None) *	System User	Maintenance 1	Administrator	SuperViewer	SuperUser ~	



8. If you want to delete a profile, click on the  $\times$  icon under the Profile's name. Then save your changes.



#### **Common Custom Profiles**

Here are a few custom profiles that you might want to create.

#### **Tool Crib Attendant**

To create a **Tool Crib Attendant** profile, you would make a copy of the profile that most closely matches what you would like your attendant to have and then add the **Tool Crib Attendant** permission from the **Locations** group.

#### **Tool Courier**

To create a **Tool Courier** profile, you would make a copy of the system user profile and add the **Tool Courier** permission from the **Devices** group.

#### Cal Lab Tech

To create a **Cal Lab Tech** profile, you would make a copy of the maintenance profile and add the **Info Edit** permission from the **Tools** group.



#### Profile Granting

When you create a new custom profile, you need to determine which other profiles in the system can assign that new Profile to users and groups. This is done in the Profile Granting Editor.

1. To access the editor, you must click on the **Settings** Tab in the L5 Connect<sup>™</sup> Admin Client. Once there, on the left side of the screen, expand **System Configuration**, then select **Profile Granting**.

		Top Level	Change Current L	Sup	erUser	Click to locaut
POIG.	JELL	Dashboard	Locatio	ns ]	Tools	Tool States
		Employees	Groups	History	Reports	Settings
<i>م</i>	Profile Granting Editor					<u> </u>
About I Network Setup System Configuration Dashboard Device Global Settings Issued Tool Past Due Profile Permissions Tracking Bags User Defined Fields Diagnostics Local Settings	This profile IP		SuperViewer     SuperViewer       Image: SuperViewer     Image: SuperViewer <t< th=""><th></th><th></th><th></th></t<>			

2. The checkboxes on the screen represent if a profile has access to grant other profiles. You need to give Super User and Administrator the ability to grant the Power User profile. If you click on the **Pencil** icon, you will enter edit mode for that Profile. All other profiles will be locked until you save your changes. Click the **Pencil** button for Super User and check the box so it can grant the Power User profile, then click the **Save button**.

ATTE	THAT					Change	Current Lo	cation	SuperUser	Click to logout	
and,	<u>~</u>		<b>D</b> (	Dash	board		Location	ns	Tools	Tool States	
2				Employ	yees	Grou	ps	Histor	y Report	s Settings	
Q	Profile Granting Editor										
About	This profile <b>&gt;</b> Can grant <b>V</b>	Power User	System User	Maintenance	Administrato	r SuperViewer	SuperUser Editing				
* System Configuration	Power User						2	_			
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Device Global Settings	Maintenance				Z E		28				
Profile Granting	Administrator						28				
Profile Permissions	SaperViewer						NH				
Tracking Bags	SuperUser					1 - M	回日				
User Defined Fields Diagnostics > Local Settings											



3. As you can see, the Super User profile can now grant the Power User profile. Edit the **Administrator** profile to also grant the **Super User** profile. When you are done, your screen should look similar to this.

ATT-1	DATA	Top Level	Change Current La	cation 🍰 Su	perUser	Click to logout		
		Dashboard	Locatio	na	Tools	Tool States		
-		Employees	Groups	History	Reports	Settings		
About Network Setup System Configuration Dashboard Device Global Settings Issued Tool Past Due Profile Granting Profile Granting Profile Granting Profile Granting Profile Fields Diagnostics Local Settings	Profile Granting Editor	Nervice Advectoriation	Seper-Viewer Seper-Der					

4. Now, the Super User or Administrator Profile should be able to assign the Power User profile to employees and groups.



## **Assigning Profiles**

Now that you have created a Profile, assigned permissions to it, and given grant rights to it for **Super User** and **Administrator**, you need to assign it to an employee or group to apply those permissions to Employees. You can do this in a few different ways. You can use the **Locations Tab**, **Employees Tab**, or **Groups Tab**. Each one has a different way of assigning a profile.

#### Location Tab Method

The first method is the **Location Method**. In this method, you will select a location in the **Location Tree** on the left side of the screen. Once you have chosen that Location, you will see two sub-tabs, **Profiles (Employees)** and **Profiles (Groups)**. Clicking on the Employees sub-tab will display all the Employees in the system. The Groups sub-tab will show you all the Groups in the system.



जितन्त्	DETR	Top Level Employees Dashboard	Change Current Location Groups H Locations	SuperUser	aporta 🗍	Click to logour Settings Tool States						
G International	Tep Level Organization Integritype Officiality Dealerse Dealerse Separitie Separitie Separitie	al Location office: Options Subscr recept Options Subscr digend Profile () Industried 	rufier Jadit Types	Countity Marita	izy D-E		Employees Dashboard	Charge ( Group	Longent Exception His His	Sal Sal	nerijser Reports Tools	Click to legend Settlings Tool States
· Stor Mond Have			G <sub>6</sub> Name - Tap Level - Malore - ABD Pr Marufa Tool Cri	annos Lab estrype 8001 charing b	Infe (En (En Mainteen	Top Level Organizational Loca sployeet Concept ap @Assigned Pro ma	office v v	Subscriptions rind Profiles	Audit Types	Queil	y Monitoring	
			Bar	e buined heres								

Simply use the pull-down to select which profile you want to assign to a particular employee or group, depending on which sub-tab you are on. Once selected, click the **Save** button in the top right of the screen.

<ul> <li>Employee</li> </ul>	⊘ Assigned Profile	⊙ Inherited Profiles
Smith, John J.	*	
SuperUser	SuperUser 💡	
	(Clear)	
	SuperUser	
	SuperViewer Administrator Maintenance System User Power User	



#### Employee Method

The second method to assign profiles is the **Employee Method**. In this method, you will use the **Profiles sub-tab** on the **Employees Tab**.

Locate the Employee you want to assign the Profile to on the left side and select them to bring up their Employee Settings. Then choose the **Profiles sub-tab** and expand the **Location Tree** to drill down to the location you want to assign the Profile.



#### NOTE: An Employee or Group can have different profiles assigned at different locations at the same time.

Use the pull-down to select the Profile you want to assign. Then save the Employee.

		Dashbased	Locati		Tosts	Tani States
4		Employees	Groups	History	Reports	Settings
ntitte, Jahre J. nette, Jahre J. apertilser	Seith, Jain Science Science Science Science Science Maintenance Science Maintenance Science Maintenance Science Maintenance Science Maintenance Scienc	L erships Subscriptions 001 Prover User -	3			

NOTE: When a profile is assigned, the location will turn GREEN, when no profile is assigned, the location will be BLACK.



#### Group Method

This Method works identically to the **Employee Method**, except that it applies to groups. You will assign the Profiles just like in the **Employee Method**.

Locate the group you want to assign the Profile to on the left side and select them to bring up their Group Settings. Select the **Profiles** sub-tab. You will use the **Location Tree** to drill down to the location you want to assign the Profile.



Now use the pull-down to select the Profile you want to assign. Then save the Group. As you can see, when you set a **Profile** to a location with sub-locations, the same **Profile** is applied to the parent's **Child Locations**.





## Clearing a Profile

When you want to remove a Profile from an Employee or Group, you need to select the **(CLEAR)** option from the pull-down and save the Profile.





### Complete Permissions List

Group	Permission	Purpose
Employees		
	Add/Remove	Add and remove employee accounts
	Admin Client Access Edit	Promote a standard Employee account to an Admin account and set a username & password
	Badge Edit	Set, change, and clear the RFID badge of an Employee
	Contact info Edit	Edit the E-mail, Cellphone number, and Cell Carrier of an Employee account
	Contact info View	View the E-mail, Cellphone number, and Cell Carrier of an Employee account
	Info Edit	Edit the properties of an Employee account
	Info View	View the properties of an Employee account
	Photo Edit	Add, remove, and change the photo of an Employee account
	Temp Badge Edit	Set, change, and clear the temp RFID badge of an Employee
Locations		
	Device Edit	Change the properties of a Tool Control Device
	Device Move	Change the Location of a Tool Control Device
	Info View	View Information about a Location
	Issue Tool to Work Location	Assign Tool to Work Location in Selected Location
	Issue Tools From Device	Check out Tool from Device in Location
	Notifications Edit	Change Notification Settings for a Location
	Organizational Location Edit	Change Org Location Object Properties
	Tool Crib Attendant	Enables Employee to sign in as Crib Attendant
	View Employee Signatures	Allows the user to view employee signatures entered at the end of a crib session
	View Events	View Events of Location



Group	Froup Permission Purpose					
	Work Location Edit	Change Properties of a Work Location Object				
	Work Location Move	Move a Work Location Object to a new Location				
Groups						
	Add/Remove	Add/Remove a Group Object				
	Edit Members	Edit member of a Group Object				
	Info Edit	Edit Group Object Properties				
	Info View	View the Group Object Properties				
Devices						
	Access	Access a device to check out/in tools				
	Add/Remove from Service	Add/remove a device from a service				
	Audit	Enables Audit Mode Access				
	Bypass Biometrics Access	Disable this option to require Biometrics for Device Login				
	Bypass Issued Tool Lock Out	Disable to deny users log in at a device if they have tools issued from another device				
	Bypass Second Badge Verify	Disable this option to require 2nd Badge for Verification				
	Date Time	Change Date/Time Settings in System Menu				
	Device Setup	Allows the user to perform device setup tasks on the device				
	IT Function Access	Access IT Functions in System Menu				
	Network Settings	Access Network Settings in System Menu				
	Screen Calibration	Access Screen Calibration Settings in System Menu				
	Service Diagnostics	Access Service Diagnostics in System Menu				
	Tool Courier	Allow user to pick up and drop off tools from FlexHub drop off compartments				
	Tool Return Device Other User Drop Off	Allow user to return someone else's tools to LockerHub				



Group	Permission	Purpose						
	Tool Training - Drawer	Enable Full Drawer Training						
	Tool Training - Single	Enables Single Tool Training						
	Volume	Change Sound Volume of Voice Statements from Device						
Status								
	{Customizable Statuses}	Only the protected statuses that cannot be changed are listed below. The other "customizable" status names are not listed in this document but are visible in the Admin Client. For more information about customizing statuses see the Tool Statuses document.						
	Info Conflict Clear	Allow user to clear an information conflict						
	Needs Confirmed Clear	Clear Status Needs Confirmed status						
	Status Change for Other Issued Tool	Change Status for tool issued to another user						
System Configuration								
	Audit Types Edit	Change audit type						
	Certifications Edit	Change Certifications Requirements for Tool						
	Diagnostics	Access Diagnostics						
	Maintenance Type Edit	Change Maintenance Types						
	Master Tool Edit	Add/Edit/Remove Master Tools						
	Network Settings	Change Network Settings						
	Profiles Edit	Add/Edit/Remove and Assign Profiles (recommended only for Sys Admin Account)						
	System Configuration	Edit System Configuration Settings						
	Tracking Bags Edit	Allow user ability to manage tracking bags						
	Units Edit	Edit Unit values						
<u> </u>	Verifications Edit	Edit Verification Settings						



Group	Permission	Purpose			
	Work Location Template Edit	Edit Work Location Templates			
Tools					
	Bypass Tool Status Issued Lock Out	Allow user to issue tools with statuses			
	Home Location Change	Change Location of Tool Instance			
	Info Edit	Change Tool Properties			
	Info View	View Tool Properties			
	Override Issued Tool State	Allow user to manually edit issued tool state			
	Tolerance Edit	Enabled editing detection tolerances of tools in devices			
Reports					
	Report Schedule	Enables the Ability to Schedule report			
	Report Share	Enables Ability to Share Custom Reports			



#### Employee Badges

This document will cover managing employee badges. The L5 Connect system uses RFID badges assigned to the employees defined in the system to allow access to the devices managed by the system. When creating an employee, if there is no badge assigned to that employee, they will not be able to access any of the devices in the system. This document will explain how to properly assign a badge to an employee.

#### Adding a Badge

1. To add a badge to an employee, log into the Admin application and go to the **Employees** tab.

สีกรกสาก	Top Level			Change	e Current Location	, 🤰 s	uperUser			Clic	k to logout
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	History 2.0	Reports	Settings	
۹											
Name ~											
Assembly Area A Line 0, Anne											
Assembly Area A Line 0, Gene											
Assembly Area A Line 0, James											
Assembly Area A Line 0, Steve											
Assembly Area A Line 1, Becca											
Assembly Area A Line 1, Ben											
Assembly Area A Line 2, Amy											
Assembly Area A Line 2, Lisa											
Assembly Area A Line 2, Mike											
Assembly Area B Line 0, Dean											
Assembly Area B Line 0, Liv											
Assembly Area B Line 0, Sara											
Assembly Area B Line 1, Jess											
Assembly Area B Line 1, Jim											
Assembly Area B Line 1, Opal											
Assembly Area B Line 2, Art											
Assembly Area B Line 2, Bo											
Assembly Area & Line 2, Kim Holicopter Maintenance Hangar Ali											
Helicopter Maintenance Hangar Ed											
Helicopter Maintenance Hangar, Fre											
Helicopter Maintenance Hangar, Ge											
Show Deleted Items											

2. Select the employee for whom you would like to add a badge. In the **Badge Info** group box, click the **Badge** edit button that looks like a pencil. **NOTE: If this button is instead a greyed out green checkmark, that** means the employee already has a badge assigned to them.

رBadge Info
Badge 🧷
Temp Badge 🖉 🗙
PIN Code 🖉 🗙
Photo

3. You will see a pop-up window with a progress bar asking you to scan the RFID badge of that employee. If you don't scan a badge by the time the progress bar completes, the system will time out and no badge will



4. After successfully scanning a badge, you will see the badge edit button change to a greyed out green checkmark. Click the **Save** button that looks like a blue disk to save your change.

Snap-on L5 Connect Admin Client, v:9.13.9.0325		- 0 ×
STATE	Top Level Change Current Location	Click to logout
	Dashboard Locations Tools Tool States Employees Groups History Reports Settings	
R X	Smith, John J. 12345ABC	
Helicopter Maintenance Hangar, Ed		-
Helicopter Maintenance Hangar, Fre	Info Profiles Memberships Subscriptions Attachments	
Helicopter Maintenance Hangar, Ge		
Helicopter Maintenance Hangar, Jer	Last Name Smith Badge Info	
Helicopter Maintenance Hangar, Ka	First Name John Badge 🗸 🗙	
Helicopter Maintenance Hangar, Ma	M. Initial	
Helicopter Maintenance Hangar, Tec	Title Temp badge 2	
Helicopter Maintenance Hangar, Toi	Customer ID 12345ABC PIN Code 2 ×	
Plane Maintenance Hangar, Alice	Email jjsmith@contoso.com	
Plane Maintenance Hangar, Gerald	Cell Phone 5551239876 Carrier AT&T Photo	
Plane Maintenance Hangar, Gina		
Plane Maintenance Hangar, Harold	Home Location Helicopter Maintenance Hangar	
Plane Maintenance Hangar, Harry	Language Device Default	
Plane Maintenance Hangar, Jerry		
Plane Maintenance Hangar, Joe	Admin Login	
Plane Maintenance Hangar, Preston	User Name jjsmith	
Plane Maintenance Hangar, Robin	Change Password Clear Login	
Smith, John J.		
SuperUser		
SuperViewer		
Supervisor Assembly Area A, Polly		
Supervisor Assembly Area B, Rachel		
Supervisor Helicopter Maintenance		
Supervisor Plane Maintenance Hang		
< ×		
Show Deleted Items		

5. You have now successfully added a badge to the employee.

NOTE: Even though you have assigned a badge to the employee, they will still not have access to any devices unless they also have a profile within the system. For more information about profiles see the Default and Custom Profiles and Permissions document.



## Updating a Badge

1. If an employee loses or breaks a badge and needs to have his badge updated, you would simply click the **Clear** button that looks like a red x to remove the old badge.



2. Then, repeat the process to add a badge.



#### Adding a Temporary Badge

Suppose you have an employee forget their badge one day or you have a contractor who needs access for a limited time. You can provide them with a temporary badge to allow access for an amount of time specified at the creation of the temporary badge.

1. To create a temporary badge, log into the Admin application and go to the **Employees** tab.

(Jorio		Top Level			Chang	e Current Location	, 🏂 Si	uperUser			Click to logout
<u>Markens</u>											
2		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
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Helicopter Maintenance Hangar, Ed 🛆	6										
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Plane Maintenance Hangar, Gerald	Cell Phone 55512	239876	Carrier	АТ&Т ~		ſ	Photo -		7		
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Plane Maintenance Hangar, Harold	Home Location Helic	opter Maintenan	ice Hangar								
Plane Maintenance Hangar, Harry	Language Devi	ce Default				~					
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Plane Maintenance Hangar, Joe	User Name ii	smith									
Plane Maintenance Hangar, Preston		smith				II					
Create Labor L	Change Password		Cle	ar Login			0				
Simith, John J.						(					
SuperViewer											
Supervisor Assembly Area A Polly											
Supervisor Assembly Area B. Rachel											
Supervisor Heliconter Maintenance											
Show Deleted Items											

2. Then select the employee for whom you would like to add a temporary badge. In the **Badge Info** group box, click the **Temp Badge** edit button that looks like a pencil. **NOTE: If this button is instead a greyed out green checkmark, that means the employee already has a temporary badge assigned to them.** 

Badge Info						
Badge	✓ ×					
Temp Badge						
PIN Code						



3. You will see a pop-up window with a progress bar asking you to scan the RFID temporary badge. If you don't scan a badge by the time the progress bar completes, the system will time out and no badge will be added.



4. After successfully scanning a badge, you will see the badge edit button change to a greyed out green checkmark. You will also see a date and time, which you should set to when you would like the temporary badge to stop providing access to the system devices. Once that is set, click the **Save** button that looks like a blue disk to save your changes.

Snap-on LS Connect Admin Client, v:9.13.9.0325		- 0 X
STITIC	Top Level Change Current Location	Click to logout
	Dashboard Locations Tools Tool States Employees Groups History Reports Settings	
R X	Smith, John J. 12345ABC	
Helicopter Maintenance Hangar, Ed 🔷		•
Helicopter Maintenance Hangar, Fre	Info Profiles Memberships Subscriptions Attachments	
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Plane Maintenance Hangar, Alice	Email jismith@contoso.com PIAde 2 × 4	
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Plane Maintenance Hangar, Harold	Home Location Helicopter Maintenance Hangar 🖉	
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Plane Maintenance Hangar, Jerry	Language Device Denaut	
Plane Maintenance Hangar, Joe	Admin Login	
Plane Maintenance Hangar, Preston		
Plane Maintenance Hangar, Robin	User Name jjsnith	
Smith, John J.	Change Password Clear Login	
SuperUser		
SuperViewer		
Supervisor Assembly Area A, Polly		
Supervisor Assembly Area B, Rachel		
Supervisor Helicopter Maintenance		
Supervisor Plane Maintenance Hang		
Show Deleted Items		

5. You have successfully added a temporary badge to the employee.



## Assigning Badges at Device

Admin users can assign primary or temporary badge credentials for existing employees from certain ATC devices.

Supported software versions: 9.11.2 or greater Supported devices: ATC Toolbox, RFID Cabinet

Access point: Device menu/System Changes/Edit Employee

Device must be online (satellite icon showing on front screen).

Required permissions: ATC Admin Client login + Badge edit or Temporary Badge Edit over desired employee(s)

#### NOTE: Users cannot use this feature to add a new employee at the device.

1. From the device main screen, confirm the device is online with the satellite icon, then access the Device Menu by pressing the gear icon button.





2. Select System Changes.

3.

U	N	■ Iain Menu			
Inventory	Device Status	Audit	I/T Settings		
System Changes	publeshooting	Volume	About		
Then select Edit: Employee.					
	System Changes				
Change: Foam file		Change			
	Change: Drawer Heights	Conn	Edit: Employee		
	Change: Drawer Heights	Connt	Edit: Employee		
	Change: Drawer Heights	Connt	Edit: Employee		
	Change: Drawer Heights	Conn	Edit: Employee		

4. You will be prompted for your admin username and then your admin password. This is the same username and password that you use to log into the L5 Connect Admin Client software. You can use the touch screen keyboard, or you can plug in an external USB keyboard to enter your credentials. Please note that you will be



logged out of admin access mode after 30 seconds of inactivity regardless of device auto logout settings.



5. After logging in, you will be prompted to select an employee to edit. This list will only contain the names of employees that you have permission to edit. You can use the navigation arrows on the right to move through the list of employees. Touch the button with the desired employee's name to make a selection.





6. You can also select the filter button in the upper left and enter all or a portion of the employee's name to more quickly locate a user.



7. Press the button with the user image and X to clear any active filter.





8. After the user is selected, press the appropriate button to set the user's primary badge or temporary badge.



9. Scan the targeted user's new badge during the progress bar count down.



10. If you are editing a temporary badge, you will be asked to assign an expiration date for the temporary badge. You can press the green check button to accept the default time of 1 day, or you can use the on-screen buttons to change the badge duration. Pressing the 'End of Today' button will cause the badge to






12. The most likely problem you will encounter is scanning a badge that is already assigned to another user.



13. From the employee edit screen, you can press the Left green arrow button to return to the employee select screen to continue the process for another user.



#### Badge Usage on Devices

RFID badges serve multiple purposes on the devices.

1. The only way to log into the devices is by scanning your badge.



2. Badge scans are required for performing device audits.

2 All U	Users		Вw	le	
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	Part Number	Details			
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1	NDDM80 Dwr4	Nut Driver, Metric, Ergonomi Handle, Black, 8 mm, 169.1 m	c 1m	⇒ s	can user badge
I	QD2R1000 Dwr5	Torque Wrench, Adj. Click-typ Fixed-Ratchet, 200-1000 in. I drive SuperUser, SUPERUSER 10/	pe, U.S., b., 3/8"		
I	SGDMRC1A Dwr 2 SGDMRC1A Grip, Stubby, Red Tech, ATC 10/14/2		ng, Soft 🔻		
I	STM12 Dwr 1	Socket, Deep, 3/8", 6-Point SuperUser, SUPERUSER 10/	14/2021		
	TC28C	Cutter, Tubing (1/8" - 1 1/8"	0.D.		



3. Badge scans are required for tool verifications.



4. Badge scans can be used during the process of joining a device to the L5 Connect Service.

	Service Connection
0	
PING	
тср	Select credential type Badge User Name / Password
0	ľ
ŀ	277KT001 9:#8 4.4028 2/7/2024 1617:01 (//C)



5. They can also be required for activities such as device configuration.





### PIN Code

1. Some features in the L5 Connect<sup>™</sup> system may require a PIN code in addition to a badge scan for authentication purposes. To set up a PIN code for an employee you would click the **Change** button that looks like a pencil next to the **PIN Code** label.

Badge Info ——	٦
Badge 🗸 🗙	
Temp Badge 🖉 🗙	
PIN Code	

2. You would then enter a PIN code for the employee and then click the green checkmark button. **NOTE: A PIN** code must be a positive integer of at least 4 digits and no more than 8 digits.

	Enter New PIN Code	×
Show	••••	
7	8	9
4	5	6
1	2	3
	0	CLR



3. Finally click the **Save** button that looks like a floppy disk to save your addition.

ATTETE	<b>T</b>	Level			Change	e Current Location	n 🦾 Si	uperUser			Click to logout
	Da	shboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
۹ 🛛											
Name	Smith, Johr 12345ABC	J.									
Helicopter Maintenance Hangar, Ed	6										
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Helicopter Maintenance Hangar, Tec	Inte						PIN Co	de 🔽 🗙	1		
Plane Maintenance Hangar, Alice	Customer ID 12345ABC					l			<u> </u>		
Plane Maintenance Hangar, Gerald	Email jjsmith@co	ntoso.com					Photo -		-		
Plane Maintenance Hangar, Gina	Cell Phone 55512398	6	Carrier	AT&T ~							
Plane Maintenance Hangar, Harold	Home Location Helicopter	Maintenan	ce Hangar 🖉	2							
Plane Maintenance Hangar, Harry	Language Device De	fault		-		~					
Plane Maintenance Hangar, Jerry	Language Device Di	aun									
Plane Maintenance Hangar, Joe	Admin Login ——										
Plane Maintenance Hangar, Preston	User Name jjsmith										
Plane Maintenance Hangar, Robin	Change Password		Cle	ear Login			_				
Smith, John J.							0	×			
SuperUser											
SuperViewer											
Supervisor Assembly Area A, Polly											
Supervisor Assembly Area B, Rachel											
Supervisor Helicopter Maintenance											
Supervisor Plane Maintenance Hanc											
۲ ۲											
Show Deleted Items											



Tools



#### Adding Tools

In L5 Connect<sup>™</sup>, there are two different types of tools: **Masters** and **Instances**.

A **Master** defines a tool's type, properties, and characteristics. It acts as a template for all instances of that tool. Masters are typically managed within the Admin Client.

An **Instance** is a representation of a physical tool. You can have multiple **Instances** of a Master Tool to represent having multiples of that same tool. This is used to denote the availability of the tool. The **Instance** will get its properties such as calibration settings and validation from its Master. Instances are stored at a True-Crib<sup>™</sup> or in an ATC Device.

### **Tool Properties**

A tool's **Properties** are the attributes that define the tool and how the system handles it when someone checks one out.

- **Part Number** a unique alphanumeric number to identify the tool
- Description the name and description of what the tool is
- **Units** the amount to be issued when checking out the part/tool
- **Tag** the barcode or RFID tag that will be used to ID the tool
- Photo A picture that represents the tool

In L5 Connect<sup>™</sup>, **Issue Behavior** determines the type of tool and how L5 Connect<sup>™</sup> processes it. There are four types of Tools

- **Durable** A Tool that can be returned and used again
- Kit A collection of tools that are issued together
- **Consumable** A Tool that is disposed of after use and not expected to be returned
- **Returnable Consumable** A tool that must be returned to ensure proper disposal

Instances also have a set of properties that can be defined as well.

- **Customer ID** a unique alphanumeric number set by the user to ID the tool instance
- Serial Number the serial number of the physical tool the Instance is being created for
- Tag if the Barcode for the Instance is different from the Master, it will be defined here



### Adding Tools in the L5 Connect<sup>™</sup> Admin Client Durables

 First, you need to create a Master. Go to the Tools tab in the admin client. The list on the left side will list all known Master Tools in the system. Click on the Add Button at the bottom left of the screen. NOTE: ATC Toolbox Devices automatically add their tool inventory to the system when they join the service, so you do not need to create tools for it.

Aderata	Top Level Change Current Location		cation Sup	erUser	Click to logout
	Employees	Groups	History	Reports	Settings
	Dashboard	Locatio	ns	Tools	Tool States
Port Number					
Part Number v					
434HDC					
ATI429A-1					
ATI429A-2					
ATI429A-3					
ATI429A-4					
ATI429A-5					
ATI429A-6					
ATI429A-7					
ATI429B-1					
AT1429B2					
ATI429B-3					
ATI429B-4					
ATI429B-5					
ATI429B-6					
ATI429B-7					
ATI4295XC					
Show Deleted Items					

2. You will be presented with the Master Tool Info sub-screen.

		Top Level		Sup	erUser	
La total	i Halil		Change Current L	ocation 🥬		Click to logout
		Employees	Groups	History	Reports	Settings
		Dashboard	Locatio	ons	Tools	Tool States
Part Number						
434HDC	3					
ATI429A-1	Info Maintenance					
ATI429A-2	mo Maintenance					
ATI429A-3	Part Number			ſ	Photo ———	ו
ATI429A-4	Description					
ATI429A-5	Issue Behavior Durable			~		
ATI429A-6						
ATI429A-7	Units VX					
ATI429B-1		3)				
ATI429B2						
ATI429B-3	✓ Verifications ———					
ATI429B-4						J
ATI429B-5	Issued 🖉 🗙					
ATI429B-6	Return Ret					
ATI429B-7						
ATI429SXC	Ontirel Teelhey					
ATI590L						
CTECH4R600A	Default Tolerance	<				
Show Deleted Items		_				

- 3. Now add a tool with the following properties:
  - Part Number of NT001
  - Description of New Tool 001



- o Issue Behavior Durable
- It will not have a Unit, Tag, or Photo.
- 4. Click the save button to add the Master.

		Top Level		🖉 Sup	erUser	
	1 Halil		Change Current L	ocation 🧈		Click to logout
		Employees	Groups	History	Reports	Settings
		Dashboard	Locatio	ons	Tools	Tool States
	0.					
	Nº					
Part Number						
434HDC	3					
ATI429A-1	Info Maintenance					
ATI429A-2					-	
ATI429A-3	Part Number NT001			[ <sup>1</sup>	Photo ———	ר
ATI429A-4	Description New Tool 001					
ATI429A-5	Issue Behavior Durable			~		
ATI429A-6						
ATI429A-7						
ATI429B-1		3)				
ATI429B2						
ATI429B-3	✓ Verifications ———			l		
ATI429B-4						
ATI429B-5	Issued 🖉 🗙					
ATI429B-6	Poturn R					
ATI429B-7						
ATI429SXC	Outline Trailly an					
ATI590L						
CTECH4R600A	Default Tolerance 🖉 🔉	<				
DB460C						
Show Deleted Items						

5. The tool will now be shown in the list of master tools, as seen below.

STOFT	n An	Top Level	Change Current L	ocation	erUser	Click to logout
		Employees	Groups	History	Reports	Settings
_		Dashboard	Locatio	ons	Tools	Tool States
Part Number	NT001 New Tool 001	tenance Contained In	Quantity Monit	toring		
LDH762 MMM07513 MMM07515 MMM07516	Part Number NT001 Description New Tool 001 Issue Behavior Durable	1		, F	Photo ———	
N1001 NYZ001 NYZ012 NYZ014	Units 🖉 🗙 Tag 🖉 🗙 (	3				
NYZ7000MDKIT NYZ7000S NYZ7004VB NYZ7006MG NYZ700AD	Verifications Issued 🖉 🗙 Return 🖉 🗙					
Show Deleted Items	Optical Toolbox	×				

6. Now that you have the **Master** created, you need to add an instance of the Master tool to our crib so that you can issue them out to Employees.

Click on the Instances sub-tab to bring up the Instances screen. Click on the green plus button to create a



new Instance.						
STOFT	nan	Top Level	Change Current L	ocation	berUser	Click to logout
		Employees	Groups	History	Reports	Settings
_		Dashboard	Locatio	ons	Tools	Tool States
	NT001					
Part Number ~	New Tool 001					
LDH702	3					
LDH722	Info Instances Maint	enence Centeined In	Quantity Manie	toring		
LDH762	into instances Maint	enance Contained in	Quantity Monit	toring		
MMM07513	Show Deleted Items					
MMM07515						
MMM07516	Home Location Se	erial Number 🕑 Custon	ner ID Qty 🕑 Iss	wed 🕑 Work Loc	ation 🕑 Kit	
NT001						
NYZ001						
NYZ012						
NYZ014						
NYZ7000MDKIT						
NYZ7000S						
NYZ7004VB						
NYZ700AD						
NYZ7025H50						
······································						
Show Deleted Items						

7. Select an ATC device as the Location this Instance will be created and stored, then click the √ button to continue. For this example, we will select the Tool Crib as the location.

		Top Level	SuperUser
	Select home location		
	▲ Top Level		
	Maintenance     A R&D Lab		
6	Prototype 0001		
Par	Manufacturing		
	Tool Crib		
LD			
M			
M			
M			
NT			
NY			
NY			
NY			
NY			
PB			
	Show Deleted Items		



8. After selecting a device location, the system will then ask you how many instances you want to create. For this example, we will make 3. Click the ✓ button to continue.

Maintenance	Contained	In Quar	ntity Monitor	ing
	# Instar	nces		
	3			<b>⊘ v</b>
(				
		<u> </u>	-	J

9. The instances will then be displayed in the **Instance** tab of the Master Tool.

		Top Level			🔮 Supe	rUser	
Har I have	i Kalil		Chan	ge Current Locatio	on 🥬		Click to logout
		Employe	es Í Gr	oups	History	Reports	Settings
9		Dashbo	oard	Locations		Tools (	Tool States
Part Number     LDH702     LDH722	NT001 New Tool 001 Info Instances Main	1 ntenance Con	tained In Qua	ntity Monitorin	g		
LDH762 MMM07513 MMM07515	Show Deleted Items	Serial Number	⊙ Customer ID	Oty 🕑 Issued	⊙ Work Loca	tion OKit	
MMM07516 NT001	Tool Crib			1		X	
NYZ012 NYZ014	Tool Crib Tool Crib			1			
NYZ7000MDKIT NYZ7000S							
NYZ7004VB NYZ7006MG							
NYZ700AD NYZ7025H50							
Show Deleted Items							

10. If you need to identify each tool separately due to different maintenance schedules or other reasons, you can distinguish each tool instance using its instance properties. To access the properties of an instance, double click on one of the tool instances in the list. This will bring up the **Instance Information** screen. NOTE: When a tool instance is created, a ToolID will be assigned to it by the system. This is a unique internal tracking number that is used to identify a specific tool instance and allows for tracking and historical forensics within the system. You cannot change the ToolID. It is recommended that when you replace a tool that you create a new instance and scrap the old one. That way you can track when



α το	ool was replaced.
	Top Level Super Leasting Super User
	Editing NT001
Par	NT001 New Tool 001 Top Level/Tool Crib
LD	Info Issued Status
	Customer ID Serial Number (Tool)
NY	Color ID lag
	ToolID 100272 Default Part # / Desc. NT001 / New Tool 001
NY	
NY	
NY	
PB	
	Show Deleted Items

- 11. You can then define the instance with additional identifying information. For this example:
- Customer ID- NT001a
- Serial Number NT001a
- 12. You can click on the **SAVE** button to save the changes to the Instance, then click the **CLOSE** button. The updated instance information will then be displayed in the instance list.

Saman		Top Level Change Current Location				on Suj	SuperUser Click to logout			logout				
			•	Employ	es	Gr	oups		History	$\gamma$	Report	s	Setting	ys
-				Dasht	oard	Υ	L	ocations	Ĩ	Tools		ſ	Tool States	
Q X Part Number LDH702 LDH702 LDH762 MMM07513	lr	NT001 New Too	001 Maint	enance Co	ntained In	Qua	ntity	Monitorin	a					
MMM07515 MMM07516 NT001 NYZ001 NYZ012		Home Location Tool Crib Tool Crib Tool Crib Tool Crib	⊙ S	erial Number	⊙ Custon NT001a	mer ID	<b>Qty</b> 1	⊙ Issued	⊙ Work Lo	cation	⊙ Kit	X		
NVZ014 NVZ7000MDKIT NVZ70005 NVZ7004VB NVZ7004D NVZ700AD NVZ700AD NVZ7025H50		Tool Crib					1							

#### Consumables

Consumables & Returnable Consumables are tools that have a quantity and are disposed of after use. The process of creating these is the same as creating a Durable tool. The only difference is that you create a single instance to



represent the amount of the tool. So, if you have 50 of a consumable tool, you will make one Instance and set its Quantity to 50. **NOTE: Consumables are only supported in the Tool Crib.** 

#### WARNING! When creating instances of Consumables & Returnable Consumables only create 1 instance. The quantity of the consumables is defined in the properties of the instance.

- 1. The first step is to create a master tool for the consumable. For this example, we will input the following information for our consumable:
  - Part Number CON001
  - Description Consumable Tool 001
  - Issue Behavior Consumable
  - The Unit will be 2ft (if this does not exist, you will need to create it)
  - It will not have a Tag or Photo.
- 2. To create a unit, click the **pencil** button next to Units. This will display the Units screen. All units are global and, once created, can be used with any tool master in the system. Click on the **NEW** Unit button on the bottom Left Side. Then type in the name of the Unit and click the **SAVE** button.

4			Top Level	SuperUser
			Select new value: Units	
	Q	< Info		]
0	Name	User Text 🕥 1 Pair		
Par	1 Pair			
LD				
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NY		_		
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	Show Deleted Items			



			Top Level	SuperUser
			Select new value: Units	
_	Q (	× Info		
<b>%</b>	Name	User Text 🕲 2ft		
Par LD LD LD MP MP NT NY NY NY NY	1 Pair			
NY		- L		]
NY				
	Show Deleted Items			

3. Click the  $\checkmark$  button at the bottom of the screen when done.

		Top Level	SuperUser
		Select new value: Ur	nits
		Info	
9	Name	User Text 🕥 2ft	
Par	1 Daia		
	2ft		
LD			
LD			
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MI			
MI			
NY			
	Show Deleted Items		



4. The Unit will now be assigned to the Master Tool.

		Top Level		🖉 Su	perUser	
La Ville			Change Current Lo	ocation 🥬	-	Click to logout
		Employees	Groups	History	Reports	Settings
		Dashboard	Locatio	ns	Tools	Tool States
	0					
	CON001					
Part Number	Consumable Te	ool 001				
LDH682	3					
LDH702	Info Instances Maint	tenance Contained In	Quantity Monit	oring		
LDH722	into instances maint	contained in	Guantity Monte	oning		
LDH762	Part Number CON001			ſ	Photo ———	ן ר
MMM07513	Description Consumable	Tool 001				
MMM07515	Issue Behavior Consumable	9		~		
MMM07516						
NT001	Units 2ft 🖉 🗙	ļ				
NYZ001		al				
NYZ012						
NYZ014	✓ Verifications ———			]		
NYZ7000MDKIT				11		
NYZ7000S	Issued 🖉 🗙					
NYZ7004VB	Patura R					
NYZ7006MG						
NYZ700AD						
NYZ7025H50						
NYZ7026EH						
Chaw Deleted Items						
snow peleted items						

5. Save and create a single instance of the tool in the Tool Crib

Some		Top Level	Change Current	Location	SuperUser Click to logout		
		Employees	Groups	History	Reports	Settings	
		Dashboard	Locat	tions	Tools	Tool States	
Part Number	CON001 Consumable T	Tool 001					
LDH722	Info Instances Main	tenance Contained	In Quantity Mon	nitoring			
LDH762	Show Deleted Items						
MMM07513			0				
MMM07515		Serial Number 🕑 Cu	stomer ID Qty 🕑 I	Issued Solution Work Log	cation 🕑 Kit		
MMM07516	Tool Crib		1		X		
NT001							
NYZ001							
NYZ012							
NYZ014							
NYZ7000MDKIT							
NYZ7004V/P							
NY77006MG							
NYZZODAD							
Show Deleted Items							



6. In the instance properties set the Quantity to 50. Save and Close. The Quantity is now listed in the instance list.

	-	Top Level	SuperUser
	Editing CON001		
Q Par LD	CON001 Consumable Tool 001 Top Level/Tool Crib		
LD	Info Issued Status		
	Quantity 50 2ft + -		
M	Customer ID		
M	Serial Number (Tool)		
M	Tag 🖉 🗙 🖨		
NT	Color ID Tag 🖉 🗙		
NY	Home Location Tool Crib		
NY	ToolID 100275		
NY	Default Part # / Desc. CONOUT / Consumable 1001001		
NY			
NY			
NY			
NY			
[ nn)	Show Deleted Items		

		Top Level			2	SuperUser	
				Change Currer	nt Location		Click to logout
		Emp	oloyees	Groups	History	Reports	Settings
)		D	ashboard	Loca	ations	Tools	Tool States
×	5 00000						
Part Number v	CON001	ble Tool 001					
	Consuma						
LDH682							
LDH702	Info Instances M	Maintenance	Contained In	Quantity Mo	onitoring		
LDH722							
LDH762	Show Deleted Iter	ms					
MMM07513		00.00					1
MMM07515	Home Location	Serial Num	ber Custom	er ID Qty 🕑	Sissued Work	Location Skit	
MMM07516	Tool Crib			50		X	
NT001							9
NYZ001							
NYZ012							
NYZ014							
NYZ7000MDKIT							
NYZ70005							
NYZ7004VB							
NYZ7006MG							
NYZ700AD							
· · · · · · · · · · · · · · · · · · ·							
Show Deleted Items							



#### Tool Kits

Tool Kits allow us to create a bundle of tools that can be issued out as a single instance. This is useful when you have a standard tool loadout issued to Employees frequently.

1. To create a toolkit, you need to create a new Tool Master and set the behavior to Kit. Name this new master tool, **Kit001**. Add the description, **Standard Tool Kit**. Save the Tool Master.

(John		Top Level	Change Current L	ocation	erUser	Click to logout
		Employees	Groups	History	Reports	Settings
4		Dashboard	Locatio	ons	Tools	Tool States
9 ×	e.					
Part Number						
Tur ( Humber						
434HDC ^						
ATI429A-1	Info Maintenance					
ATI429A-2						
ATI429A-3	Part Number Kit001			[ <sup>F</sup>	'hoto ———	ן ר
ATI429A-4	Description Standard Too	l Kit				
AT1429A-5	Issue Behavior Kit			~		
ATI429A-6						
ATI429A-7	Units 🖉 🗙					
ATI429B-1		B				
AT1429B2						
ATI429B-3	Verifications ———					
ATI429B-4						
AT1429B-5	Issued 🖉 🗙					
ATI429B-6						
ATI429B-7	Return X					
ATI429SXC	L					
ATI590L						
CON001						
CTECHARGONA						
Show Deleted Items						

2. Now add the tools that will be included with the kit. Click on the **Template** tab, then click on the **Green +** symbol to add a new tool.

		Top	Level	Channe Camp		SuperUser		Click to locat
Halle !!							. Y	Click to logout
			Employees	Groups	Histo	ory Re	ports	Settings
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ki ×       Part Number ×	Kit0 Stan	<b>01</b> dard Tool Kit						
Consumable Kit								
Kit DuckKit	Quantity M	onitoring	Atta	hments	Certifi	cations	Optical T	oolbox
Kit Master	Info	Insta	nces	Maintenance		Template	Conta	nined In
Kit Master2			/					
Kit Master3		Record child	events 🗹 Allov	Kit Condition St	atuses			
Kit TurDuckKit			71101	rat condition of	atuses			
Kit with drawers								
Kit001		Description	Sissue Benavi	or Minimum Qua	antity Reload	Quantity Oni	Is Cocation	
Metric Socket Kit								
SimulatorToolKiosk								
Turduckit								
Turuuckit								
Show Deleted Items								

You will then be presented with a list of the master tools managed by the system. Find the tool you want to include in your kit. For this kit, select NT001 and click on the ✓ button to add it.
 NOTE: Just like with normal Tools, Kit Tools have a MASTER and instances. If the tool you want to add



#### to the kit is not in the list, you will need to create a new MASTER for that tool.

	Sele	ct type for new	item		
Part Number     NDD116AR	NT001 New Tool 001				
NDDM100	Quantity Monitoring	Attachments	5	Certifications	Optical Toolbox
NDDM110	Info	Instances	N	Aaintenance	Contained In
NDDM120	Part Number NT001				Ph a ta
NDDM60					
NDDM70	Description New 1001 001				
NDDM80	Issue Behavior Durable				
NDDM90					
NT001					
NYZ001	Tag	6	∥×∥⊜	((*)	
NY2012					
NYZ014	Verifications				
NYZ7000MDKII					
NY27000S	Issued 🖉 🗙				
Show Deleted Items	Return 🖉 🗙				v

4. Once you have selected your tool, the system will ask how many of the tools you wish to add to the kit. Also, If the kit has specific locations like drawers or pouches, you can add those. Add one Instance of this tool it doesn't have a location, click on the √ button.

	Change Current Location	
	NT001 New Tool 001	
Select: Quantity ———	Select: Location ———	
Minimum Quantity 1		×
	Available	

You should see the tool listed in the Template.
 NOTE: Adding a tool to a template does not create an instance, like a master tool, a template is just a blueprint of what the kit is supposed to contain. When you create an instance of the Kit, you will be



given the option of moving an existing instance of the child tool to the kit or creating a new one.

		Top L	evel		👩 Super	User		
Let IV-1	i Ka 1			Change Current Loca	ntion 🥬			Click to logout
			Employees	Groups	History	Repo	rts	Settings
2			Dashboard	Locations	T T	ools	Too	l States
🔍 ki 📉 🗙	Kitt	001						
Part Number	Star	ndard Tool Kit						
ConsumableKit	3							
Kit DuckKit	Quantity N	Ionitoring	Attachm	ents	Certifications		Optical To	olbox
Kit Master	Info	Instan	ces	Maintenance	Templat	e Í	Contai	ned In
Kit Master2			h.					
Kit Master3		Becord child e	vents 🗹 Allow Ki	t Condition Statuses				
Kit TurDuckKit				condition statuses				
Kit with drawers						Que		
Kit001	Part Number	Description	Issue Benavior	Minimum Quantity	Reload Quantity	Units	Cocation	
Metric Socket Kit	NT001	New Tool 001	Durable	1.00				
NYZ7000MDKIT								
SimulatorToolKiosk								
Turduckit								
Show Deleted Items								

6. Finish setting up your kit by adding tools to the kit by repeating the steps above. Once you are finished, click the **Blue Save Icon** to save the **Kit Master Tool**.

NOTE: When adding a consumable to a kit, it will prompt you for a Minimum Quantity like a durable tool, but it will also ask you for a reload quantity once the minimum amount has been reached.

TOFT	$\overline{a}$	Тор	Level	Ch	ange Current Locati	on Sup	perUser	Clic	k to logout
			Employees	Ĩ	Groups	History	Reports	Set	ttings
2			Dashboa	rd ľ	Locations		Tools	Tool Sta	ates
ki     X Part Number	Kitt Star	<b>001</b> ndard Tool Kit						<b>(</b>	
ConsumableKit Kit DuckKit	Quantity N	Ionitoring		Attachment	s	Certifications		Optical Toolb	ox
Kit Master	Info	Insta	ances	Ma	intenance	Temp	late	Contained	In
Kit Master3 Kit TurDuckKit Kit with drawers		Record child	events 🗹	Allow Kit Co	ondition Statuses				
Kit001	Part Number	Descriptio	on 🕑 Issu	e Behavior	Minimum Quanti	ty Reload Qua	antity 🕑 Units	<ul> <li>Location</li> </ul>	
Metric Socket Kit	CON001	Consumable Tool (	001 Consuma	ble	1.00	1.00	2ft	_	
NYZ7000MDKIT	CTECH4R600A	600 ft. lb. torque v	wrench Durable		1.00				
SimulatorToolKiosk	NT001	New Tool 001	Durable		1.00				
Turduckit	TP-01	TEST PART	Durable		1.00				
Show Deleted Items									

Once created, you have options at the top of the Template tool list.



- **Record child events** Log events for all children of the kit and the kit itself.
- Allow Kit Condition Statuses If an instance of a kit doesn't have an instance of all the child tools assigned to it, a status of Kit Mismatch will be applied to it. If a tool is missing from the kit at return



it will have a Kit Incomplete status assigned to it. If a consumable tool in the kit has less than the minimum quantity, it will have a Kit Low Quantity status assigned to it.

- 7. Set the options how you would like them and create an instance of the kit in the Tool Crib so that it can be issued out.
- 8. Once the Instance is created, you need to create or move tool instances for the child tools. In this exercise, create new instances for the tools. First, go to the Instance properties and then the kit tab.

Editing I	<b>KitOO1</b> KitOO1 Standard Tool Kit <i>Top Level/Tool Crib</i>						8
Info Issu Kit Mismatch	ued Status Update: Master 1	Kit Template Create: 1	Fools				
	⊘ Part Number	<ul> <li>Details</li> </ul>	⊙ Quantity	⊙ Minimum Quantity		<ul> <li>Location</li> </ul>	
Ø	CON001	Consumable Tool 001		1	1		
Ø	CTECH4R600A	600 ft. lb. torque wrench		1			
Ø	NT001	New Tool 001		1			
Ø	TP-01	TEST PART		1			

- 9. You will see a Kit Mismatch section here. You have two options:
  - **Update: Master Template** Change the Template on the Master tool based on the Instance.
  - o Create: Tools Create tool instances based on the Master Tool Template.
- 10. Click on **Create: Tools** you will see the color change from RED (Missing instance) to Grey (Present) and Yellow (Tool with a Status).

	_	<u> </u>			Top Level	Change C	ment foration	SuperUser	Click to
	Edi	iting	Kit001						<b>E</b>
	3	E	<b>Kit001</b> Standard Tool Kit Top Level/Tool Crib						
1	Info	Iss	ued 🚦 Status	Kit					
	-	)							
			Part Number	⊘ Details	Quantity	Minimum Quantity			
		×	CON001	Consumable Tool 001	0	1	1		
		×	CTECH4R600A	600 ft. lb. torque wrench	1	1			
		×	NT001	New Tool 001	1	1			
		×	TP-01	TEST PART	1	1			
					-		-		
	She	ow Deleted I	Items						

The yellow is a Tool Status for the consumable since there isn't any quantity of the tool in the kit, and it



needs to be reloaded. Double-click CON001 and set its Quantity to 1, click the SAVE button, then CLOSE.

	Editing CON	N001					<b>E</b>
2º	<b>CON001</b> Consumable Tool 00 <i>Top Level/Tool Crib</i>	11					
Info Issi	ued Status						
Qu	antity 1	2ft + -					
Custo	ner ID						
Serial Number	(Tool)	2					
Color							
	Kit Kit001 / Stand	dard Tool Kit 🖉					
Default Part #	ToolID 100277	nsumable Tool 001					
	,						
Show Deleted I		n cloarad					
e status ha	is now beer	n cleared.	Top Level	_	Ĭe	SuperUser	_
status ha	is now beer	n cleared.	Top Level	Charac Ca		SuperUser	
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Editing I	IS NOW beer Stitudon Kitoon Standard Tool Kit Top Level/Tool Crib	n cleared.	Top Level	Channe Ch		SuperUser	Citat to a
Editing I	IS NOW beer Cit001 Kit001 Standard Tool Kit Top Level/Tool Crib red Status	n cleared.	Top Level	C	Ì 2	SuperUser	end as
Editing I	s now beer <b>Cit001</b> <b>Kit001</b> Standard Tool Kit <i>Top Level/Tool Crib</i> <b>red</b> Status	Kit	Top Level			SuperUser	en e e e e e e e e e e e e e e e e e e
Editing I	Alton Al	Kit	Top Level	↔ Minimum Quantita:	Relaad Ausariin	SuperUser	citat se a
Editing I	A strong for the stro	Kit O Details Consumable Tool 001	Op Level       O Quantity	⊙ Minimum Quantity	⊙ Reload Quantity	SuperUser ⓒ Location	
Editing I	Cit001 Standard Tool Kit Top Level/Tool Crib ed Status O Part Number CON001 CTECH4R600A	Kit © Details Consumable Tool 001 500 ft. lb. torgue wrench.	Top Level	⊙ Minimum Quantity	⊙Reload Quantity 1	SuperUser © Location	
Editing I	Cit001 Standard Tool Kit Top Level/Tool Crib ied Status O Part Number CON001 CTECH4R600A NT001	Kit © Details Consumable Tool 001 600 ft. lb. torque wrench New Tool 001	Top Level       O Quantity       1       1	⊙ Minimum Quantity 1 1	⊙ Reload Quantity	SuperUser          Output         Output         Location	
Editing I	CitOO1 KitOO1 Standard Tool Kit Top Level/Tool Crib Ied Status O Part Number CON001 CTECH4R600A NT001 TF-01	Kit © Details Consumable Tool 001 600 ft. lb. torque wrench New Tool 001 TEST PART	Op Level       O Quantity       1       1       1	<ul> <li>⊙ Minimum Quantity</li> <li>1</li> <li>1</li> <li>1</li> </ul>	© Reload Quantity	SuperUser           Output           Output           Location	estate S
Editing I	AS NOW been Kit001 Kit001 Standard Tool Kit Top Level/Tool Crib Ind Status ○ Part Number CON001 CTECH4R600A NT001 TP-01	Kit © Details Consumable Tool 001 600 ft. lb. torque wrench New Tool 001 TEST PART	Op Level       O Quantity       1       1       1       1	<ul> <li>⊙ Minimum Quantity</li> <li>1</li> <li>1</li> <li>1</li> </ul>	© Reload Quantity	SuperUser           Output           Output           Location           Image: SuperUser	estate S
Editing I	S now beer Kit001 Standard Tool Kit Top Level/Tool Crib red Status ○ Part Number CON001 CTECH4R600A NT001 TP-01	Kit © Details Consumable Tool 001 600 ft. lb. torque wrench New Tool 001 TEST PART	Op Level       O Quantity       1       1       1       1	<ul> <li>⊙ Minimum Quantity</li> <li>1</li> <li>1</li> <li>1</li> </ul>	© Reload Quantity	SuperUser           SuperUser	
Editing I	Kit001 Kit001 Standard Tool Kit Top Level/Tool Crib Ied Status ○ Part Number CON001 CTECH4R600A NT001 TP-01	Kit © Details Consumable Tool 001 600 ft. lb. torque wrench New Tool 001 TEST PART	Top Level	⊙ Minimum Quantity 1 1 1 1	⊙ Reload Quantity 1	SuperUser	erat est
Editing I	Kit001 Kit001 Standard Tool Kit Top Level/Tool Crib Ied Status Part Number CON001 CTECH4R600A NT001 TP-01	Kit © Details Consumable Tool 001 600 ft. lb. torque wrench New Tool 001 TEST PART	Top Level	⊙ Minimum Quantity 1 1 1 1	⊙ Reload Quantity 1	SuperUser	en en

#### Importing a Tool Kit Template

If you already have a list of tools you want to add to a kit, you can import them to the Instance by clicking the **IMPORT** button.



You will need to create a new Kit Master. Then create an instance of that Master. Go to the kit tab within the instance properties and use the **IMPORT** button. Once imported, you can then click on Update: Master Template. That will then push the list of tools to the Tool Master Template.



#### Tool Tags

Master tools and tool instances can have tags assigned to them. This is either a 1D or 2D barcode, or it can also be an RFID tag. A tag on a master tool could be used in a crib for a bin of multiple instances of that tool type. Then the attendant could scan a copy of that tag on the bin to issue one of the instances of that tool. A tag could be applied to specific instances of tools that need to be tracked individually for maintenance purposes, such as torque wrenches. RFID tags are also used to uniquely track tool instances inside of RFID devices such as the ATC Portal and ATC Locker.

Lateratie	สก	Top Level		Change	Current Locatio	n 🏅 Si	uperUser			Click to logou
		Dashboard	Locations To	ols Tool States	Employees	Groups	History	Reports	Settings	
Part Number	QD2R Torqu	t <b>100</b> e Wrench, Adj. Cli	ck-type, U.S., Fixed	l-Ratchet, 20-100 ft. ll	b., 3/8" drive					
1410 NO KEY 1650	Info Instances	Maintenance	Contained In	Quantity Monitori	ing Attachn	nents 🕺 O	ptical Toolb	юх		
1AM1541	Part Number Q	D2R100				Photo -		1		
1DA221HP NO WRENCHES	Description To	rque Wrench, Adj	. Click-type, U.S., I	ixed-Ratchet, 20-100	ft. lb., 3/8"					
208CCP	· di	ive								
235605	Issue Behavior	Durable			Ŷ					
3852T43	Units	0 ×								
434HDC	_		r							
5970000374158		4T100014	<u>ا</u>			_	_			
6T-SGHF614BR						0	×			
87CF	Verifications —				'		_	1		
8MA-SGHF615BR	Issued	Issued Verification								
8R-SGHF614BR										
91ACP	Return									
96CF	Outleal Teally a	-								
A2A										
AC5B	Default Tolerance									
AT380	L									
ATI429A-1										
AT1429A-2										
Show Deleted Items										

Image: Contract of the state of the sta			nance Attachmen	ts			
Image: Contract of the state of the sta	Customer I	D					_
Image: Contract of the state of the sta	umber (Too	1)					
Image: Construction of the state of the	User Label	2					
Kit Master / A tool that is a kit         Ø2960         2D2R100 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8° drive		0					
Kit Master / A tool that is a kit (29960 2D2R100 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive	Color ID To						
Kit Master / A tool that is a kit 💋 102960 2D2R100 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8° drive	Color ID Ta	9					
02960 DD2R100 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive	к	it Kit Master / A tool t	hat is a kit				
duzk του / Torque wrench, Aoj, Click-type, U.S., Fixeo-katcher, 20- του τ. Ib, 5/ο. drive	Tooll	D 102960	Nearsh Adi Clisk tura	U.C. Ewed Databat 20 100	6 lls 2/0" daius		
	art # / Des	c. QD2K1007 lorque v	vrench, Adj. Click-type,	0.5., Fixed-Ratchet, 20-100	11. ID., 5/8 drive		



You can manually enter a tag value by typing it into the text box. This value must be unique in the system. You could also click the **Pencil** button and then scan the tag, using a supported tag scanner to import the tag value. Alternatively, you can click the **Auto generate value** button to have the system assign a generated tag value. Then you will need to click the blue **Save** button to save the change.



Once you have a valid tag created, you can then use the print button to print that tag. This requires that you have previously installed and configured an L5 approved barcode printer for your system. Otherwise, the print button will not be enabled.





### Importing Tools from Spreadsheet

When setting up an ATC device for the first time or adding several new tools to the inventory, it can be very timeconsuming to input all that information one tool at a time. Tool importing would cut that time down significantly, allowing you to be more productive.

You can use the Tool Import wizard if you have a list of the tools in an Excel format (.xslx). To start, you must be logged into the Administration Client and have the appropriate permission to import tools.

The tool properties that can be imported are:

- **Compartment (Kiosk only)** Door/drawer number of the tool's desired kiosk
- **Customer ID** Custom ID defined by the customer
- **Description** The Tool Name or short description of the tool
- Issue Behavior The type of tool (See Tool section of Administration Guide)
- Location The sub-location within the Crib that the tool will reside
- Parent For Kits, this is the Parent (Key) in which this tool belongs to
- Parent (Key) For Kits, this is the ID to identify a kit Parent (Must be unique)
- **Part Number** The Part Number of the Tool
- **Quantity** the number of instances that needs to be created
- Serial Number the serial number of the tool
- **Tag** RFID or Barcode for the tool
- Units the amount of something that is given to an Employee on a single issue

Note: When attempting to import a tool in which a MASTER already exists in the system, you will instead add an additional instance of that tool.



#### Via Admin Client

#### ATC Toolbox

To use the Toolbox, you will need to train it to detect the tools within it. We do this by utilizing a Foam File that tells the Toolbox where to look to find the tool in the drawer. You will need to import the foam file to the Toolbox.

NOTE: Tools on the Toolbox cannot be imported through an excel sheet, instead a foam file must be uploaded. You will have one foam file for every drawer that the toolbox has. If you do not have any foam files, please contact your Snap-on representative.

- 1. From the L5 Connect<sup>™</sup> Admin Client, click on the **locations** tab.
- 2. Select the Toolbox that you want to upload the new foam files to and click on the **import file button**.



3. Browse to the file and click **Open. NOTE: You can only import one foam file at a time** 

ganize 👻 New fold	er				BH 🕶 🔟 (
Microsoft Teams ^	Name	Status	Date modified	Туре	Size
Notebooks	Drawer1.txt	0	8/24/2021 12:30 PM	TXT File	387 KB
Pictures	Drawer2.txt	0	8/24/2021 12:30 PM	TXT File	552 KB
This PC	Drawer3.txt	0	8/24/2021 12:30 PM	TXT File	535 KB
20 Ohierte	Drawer4.txt	0	8/24/2021 12:30 PM	TXT File	681 KB
Decision Decision	Drawer5.txt	0	8/24/2021 12:30 PM	TXT File	631 KB
Desktop	Drawer6.txt	0	8/24/2021 12:30 PM	TXT File	472 KB
Documents	Drawer7.txt	Ø	8/24/2021 12:30 PM	TXT File	496 KB
Downloads	Drawer8.txt	Ø	8/24/2021 12:30 PM	TXT File	219 KB
Music					
Pictures					
Videos					
Windows (C:)					
S Citrix Files (S:)					
Groups (\\conw					



4. You will then be asked to confirm that the foam file is correct. **NOTE: The foam file should look exactly like the drawer it is uploaded to, if not click on the red X on the right.** 



5. After you confirm the foam file, it will then get uploaded to the Toolbox.

	and and a	My Company		CI	nange Current L	ocation	SuperUser,	SUPERUSER		Click to	logout
BIE		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
Q Name		In	nporting	: Foa	m file						
Name      A My Company     Brake Shop     Calibration Lab     Engine Shop     Filght Operations     A Maintenance     A Hangar 1     S4 Toolbox     A Hangar 1     S4 Toolbox     A Hangar 2     Hangar 2     Hangar 2     H2 Bay 1     H2 Bay 2     Angar 2     Area A     A Line 1     A Line 2     Area 8     B Line 1     B Line 1     B Line 1     B Line 2     R2D Lab     Tool Crib	Import: Foam file: Start     - Foam file: C\ProgramDat     - Importing -> Foam file     - Foam file -> Service Com     - Foam file -> Device     - Finished	a\Tool Control	. System\Smart	2Device\D	eviceData\Z92	2LP999\Drawer.	Archive\Dr	awer8.txt	Quantity M	onitoring	
Show Deleted Items											



#### Other Devices

NOTE: Only 100 tools can be imported at a time from the admin client. However, larger numbers of tools can be imported directly on certain devices. (See below)

- 1. On the Location Tab, select the device on the left that you want to import tools into, then click the Import Tools Button open the import wizard.
- Then you need to select the file you want to use for the import.
   45 Select: Spreadsheet

5 Select: Spreadsheet			×
← → <b>~</b> ↑ 🖡 → 1	This PC > Desktop > New folder	v ت	
Organize 🔹 New fol	lder		ii • 🔳 😲
📌 Quick access	Name	Date modified	Type Siz
, This PC	DEMOINVENTORY.xlsx	3/8/2022 11:17 AM	Microsoft Excel Work
3D Objects Desktop			
Documents			
Music			
📰 Pictures 🚼 Videos			
🍆 Local Disk (C:)			
➡ GAMES (D:) ➡ GAMES 2 (E:)			
🍨 Network	<		
File	name: DEMOINVENTORY.xlsx		Excel files (.xlsx) (*.xlsx)
			Qpen Cancel

3. Once you have selected the file, the wizard will want you to define some data on the screen so it can read it correctly. Next, you will need to click on the row containing the data headers.

					Identify	/ Colu	umn (I	Drop-Do	wn Menu)	<u> </u>
Part Number	Description	Serial Number	Parent (Key)	Issue Behavior	Tag	Parent	Quantity	Units		
art Number	Description	Serial Number	Parent (Key)	Issue Behavior	Tag	Parent	Quantity	Units		
VND100	Shop Fan		100013	Durable	PWIND10001		1.00			
WND100	Shop Fan		100014	Durable	PWIND10002		1.00			
VND100	Shop Fan		100015	Durable	PWIND10003		1.00			
WND100	Shop Fan		100016	Durable	PWIND10004		1.00			
VND100	Shop Fan		100017	Durable	PWIND10005		1.00			
T1800AL	1" Heavy Duty Impact Wrench	IW-0001	100023	Durable	PPT1800AL01		1.00			
71800AL	1" Heavy Duty Impact Wrench	IW-0002	100024	Durable	PPT1800AL02		1.00			
11800AL	1" Heavy Duty Impact Wrench	IW-0003	100025	Durable	PPT1800AL03		1.00			
TECH4R600A	600 ft. lb. torque wrench	TW-0001	100028	Durable	PCTECH4R600A01		1.00			
TECH4R600A	600 ft. lb. torque wrench	TW-0002	100029	Durable	PCTECH4R600A02		1.00			
TECH4R600A	600 ft. lb. torque wrench	TW-0003	100030	Durable	PCTECH4R600A03		1.00			
B4HDC	%" DR SET w/CASE & FOAM	434HDC-1	100033	KR .	P434HDC1		1.00			
VMH140170	Pallet Jacks - 20x36		100038	Durable	PWMH14017001		1.00			
VMH140170	Pallet Jacks - 20x36		100039	Durable	PWMH14017002		1.00			
VMH140172	Pallet Jacks - 20x48		100640	Durable	PWMH14017201		1.00			
VMH140172	Pallet Jacks - 20x48		100041	Durable	PWMH14017202		1.00			
VMH140174	Pallet Jacks - 27x42		100042	Durable	PWMH14017401		1.00			
VMH140174	Pallet Jacks - 27x42		100043	Durable	PWMH14017402		1.00			
VMH140175	Pallet Jacks- 27x48		100044	Durable	PWMH14017501		1.00			
VMH140175	Pallet Jacks- 27x48		100045	Durable	PWMH14017502		1.00			
TL-300-DTGK	Guage - Aircraft Tire, Digital		100228	Durable	PTTLBOODTGK		1.00			
WZ7000MDKIT	Kit - NYROC Mastic Removal	NYZ7000MDK/T-01	100229	KR:	PNYZ7000MDKIT01		1.00			
11590L	Kit - Rivet shaver	ATI590L-01	100242	KR:	PAT1590L01		1.00			
DH702	3/4DR 12PT 2 3/16" SHL SKT		100207	Durable	PAT1590L02	100033	1.00			
DH722	3/4DR 12PT 2 1/4" SHL SKT		100212	Durable	PATI590L03	100033	1.00			
DH762	3/4DR 12PT 2 3/8" SHL SKT		100217	Durable	PATI590L04	100033	1.00			
8434HD	CASE AND FOAM FOR 434HDC		100222	Durable	PATIS90L05	100033	1.00			
DH522	3/4DR 12PT 1 5/8" SHL SKT		100167	Durable	PATIS90L06	100033	1.00			
DH542	3/4DR 12PT 1 11/16" SHL SKT		100172	Durable	PAT1590L07	100033	1.00			
DH562	3/4DR 12PT 1 3/4" SHL SKT		100177	Durable	PATI590L08	100033	1.00			
DH582	3/4DR 12PT 1 13/16" SHL SKT		100182	Durable	PAT1590L09	100033	1.00			
DH602	3/4DR 12PT 1 7/8" SHL SKT		100187	Durable	PATI590L10	100033	1.00			
DH642	3/4DR 12PT 2" SHL SKT		100192	Durable	PATI590L11	100033	1.00			
DH662	3/4DR 12PT 2 1/16" SHL SKT		100197	Durable	PATI590L12	100033	1.00			
DH682	3/4DR 12PT 2 1/8" SHL SKT		100202	Durable	PATI590L13	100033	1.00			
.122	3/4DR 16IN LCK BTN EXT		100047	Durable	PATI590L14	100033	1.00			
32	3/4DR 3IN LCK BTN EXT		100052	Durable	PATI590L15	100033	1.00			
528	T-BAR HEAD		100057	Durable	PAT1590L16	100033	1.00			
62	3/4DR SIN LCK RTN EXT		100043	D. white		100011	1.00			



Then you will need to use the pull-downs and select what the headers are.

$\checkmark$				Se Ider	lect Head ntify Colu	der Ro umn (D	w (Doul Drop-Do	ole-Cl wn M	ick) 😡
Part Number	Description	Serial Number	Parent (Key)	Issue Behavior	Tag	Parent	Quantity	Units	
Part Number *	Description *	Serial Number *	Parent (Key) ~	Issue Behavior *	Tag ~	Parent ~	Quantity ~	Units *	
Part Number	Description	Serial Number	Parent (Key)	Issue Behavior	Tag	Parent	Quantity	Units	
WIND100	Shop Fan		100013	Durable	PWIND10001		1.00		
WIND100	Shop Fan		100014	Durable	PWIND10002		1.00		
WIND100	Shop Fan		100015	Durable	PWIND10003		1.00		
WIND100	Shop Fan		100016	Durable	PWIND10004		1.00		
WIND100	Shop Fan		100017	Durable	PWIND10005		1.00		
PT1800AL	1" Heavy Duty Impact Wrench	IW-0001	100023	Durable	PPT1800AL01		1.00		
PT1800AL	1" Heavy Duty Impact Wrench	IW-0002	100024	Durable	PPT1800AL02		1.00		
PT1800AL	1" Heavy Duty Impact Wrench	IW-0003	100025	Durable	PPT1800AL03		1.00		
CTECH4R600A	600 ft. lb. torque wrench	TW-0001	100028	Durable	PCTECH4R600A01		1.00		
CTECH4R600A	600 ft. lb. torque wrench	TW-0002	100029	Durable	PCTECH4R600A02		1.00		
CTECH48600A	600 ft. lb. torque wrench	TW-0003	100030	Durable	PCTECH48600A03		1.00		
434HDC	%" DR SET w/CASE & FOAM	434HDC-1	100033	12	P434HDC1		1.00		
WMH140170	Pallet Jacks - 20x36		100038	Durable	PWMH14017001		1.00		
WMH140170	Pallet Jacks - 20v36		100039	Durable	PWMH14017002		1.00		
WMH140172	Pallet Jacks - 20x88		100040	Durable	PWMH14017201		1.00		
WMH140172	Pallet Jacks - 20x48		100041	Durable	PWMH14017202		1.00		
WMH140174	Pallet Jacks - 27x82		100042	Durable	PWMH14017401		1.00		
WMH140174	Pallet Jacks - 27x42		100043	Durable	PWMH14017402		1.00		
WMH140175	Pallet Jacks- 27xdR		100044	Durable	PWMH14017501		1.00		
WMH140175	Pallet Jacks- 27xd8		100045	Durable	PWMH14017502		1.00		
TTL-300-DTGK	Guage - Aircraft Tire Digital		100228	Durable	PTTI BOOTINSK		100		
NYZ7000MDKIT	Kit -NYROC Mastic Removal	NYZ7000MDKIT-01	100229	12	PNYZ7000MDK/T01		1.00		
4T15901	Kit - Rivet chaver	47(590)-01	100242	6	PATI590(01		1.00		
LDH202	3/408 120T 2 3/16" SHI SKT		100207	Durable	00T1500L02	100033	1.00		
LDH722	3/4DR 12PT 2 1/4" SHL SKT		100212	Durable	PATI590L03	100033	1.00		
IDH762	3/408 129T 2 3/8" SHI SKT		100217	Durable	PATI 5901 04	100033	100		
P8434HD	CASE AND FOAM FOR 434HDC		100222	Durable	PATI590L05	100033	1.00		
104522	3/408 12PT 1 5/8" SHI SKT		100167	Durable	PATI 590L06	100033	1.00		
10H542	3/4DB 120T 1 11/16" SHL SKT		100172	Durable	DATI 5901.07	100033	1.00		
LDH562	3/4DR 12PT 1 3/4" SHL SKT		100177	Durable	PATI590L08	100033	1.00		
LDH582	3/4DR 12PT 1 13/16" SHL SKT	-	100182	Durable	PATI590(09	100033	1.00		
10602	3/408 129T 1 7/8* SHI SKT	1	100187	Durable	BATI 590( 10	100033	1.00		
IDH642	3/40R 120T 2" SHI SKT	-	100192	Durable	DUTI 500111	100033	100		
LDH662	3/4DR 12PT 2 1/16" SHL SKT	-	100197	Durable	DATI590L12	100033	1.00		
IDHAR2	3/408 1297 2 1/8* SHI SKT	-	100202	Durable	PATI590(13	100033	100		
122	240P 16N LCK ETN EXT	-	100047	Durable	DATI500114	100022	100	-	
132	3/408 3IN LCK BTN EXT	-	100052	Durable	PATI 590(15	100033	1.00		
1528	T-RAR HEAD	-	100057	Durable	DATI 500116	100033	100		
162	2400 BIN LCK BIN BYT	-	100052	Durable	DATI500117	100022	100		
	A HOR OFFICER OFFICER		10000	Durable	DATIANA IA	1000233	1.00		

4. Once you have selected these, you can click on the Import Button  $\checkmark$ , or you can click on the X to cancel. The tools should now be added to the device.



#### Direct Device Import

#### Tool Crib

#### NOTE: Importing tools directly on the Tool Crib allows for imports of greater than 100 tools at once

1. On the True-Crib<sup>™</sup> Dashboard, click on the Import Tools Button to import your tools. You will then be prompted to log in with your admin username and password.

45 Snap-on True-Crib									-	□ ×
नित्तार्ट	]/	7						<b>Attendant</b> SuperUser	Click	to logout
		SCAN EMPLO	OYEE BADGE TO	O START					3	
System Status Filtered	Total	Device Status	Hide OK Items	Alerts:	ind	Work Loc	ation Status	Hide OK Items	Aler	ts:
Devices Online : 1 Devices Offline : 0 Tools Issued : 0	1 0 0	Tool Crib 0 0	0 0	Alert Device	oor	Name Alen	s issued issued users issue	u Devices Ming	Ju Out Alert	Device 100
Users with Tools Issued : 0	0									
Tools Issued with Alerts : 0	0									
Managed Tools Out: 0	0									
Tools Managed : 0	' I									
						<				>
Top Employees with Issued To Top	p Work	Locations with Issu	Top Devices with	Issued Tools	Recent Ev	vents				
					Time		Action	Part Number	Employee	Source I
					4/11/2022	2 12:51:30 PM	Tool Crib Attendant Login		SuperUser	Tool Crib
					4				_	>



2. Then you need to select the file you want to use for the import.

45 Select: Spreadsheet			×
$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ $\square$ $\Rightarrow$ This	s PC > Desktop > New folder	ء کر <mark>ن ب</mark>	earch New folder
Organize 👻 New folde	r		III - 🔟 🕐
★ Quick access	Name	Date modified	Type Size
This PC		3/8/2022 11:17 AM	Microsoft Excel Work
3D Objects			
💻 Desktop			
Documents			
🖊 Downloads			
🁌 Music			
Pictures			
🛃 Videos			
😓 Local Disk (C:)			
🕳 GAMES (D:)			
🤝 GAMES 2 (E:)			
🔮 Network	<		<b></b> >
<b>File</b>		Fund fi	
File <u>n</u> ar		Excel fil	
		Q	pen Cancel

3. Once you have selected the file, the wizard will want you to define some data on the screen so it can read it correctly. Next, you will need to click on the row containing the data headers.

$\checkmark$			Identif	t Heade v Colur	nn (Drop-I	Dov	vn M	ck) enu)		۷
Part N	lumber	Description	Serial Number	Parent_Key	Issue Behavior	Tag	Parent	Total Quantity	Units	
				0				7.1.10		
Part Num	ber	Description	Senal Number	Parent_Key	Issue Behavior	Tag	Parent	Total Quantity	Units	_
GLOVE7N	10	IPG HD LATY TECH GIVS		100007	Consumable			50.00	1 Pair	
GLOVEZY	18	YI HD LATY TECH GIVS		100002	Consumable	-		50.00	1 Pair	_
GLASS12	RKA	Safety Glasses		100004	Consumable		<u> </u>	25.00	Trail	
GA225	0101	Face Shield		100005	Returnable Consumable			10.00		
GA3200		Ear Protectors		100006	Consumable			250.00	1 Pair	
DB160C		Drill Bits		100007	Returnable Consumable		<u> </u>	100.00		
MMM075	513	Surface Conditioning disc M Grit		100008	Returnable Consumable			25.00		
MMM075	515	Surface Conditioning disc VF Grit		100009	Returnable Consumable			25.00		
MMM075	516	Surface Conditioning disc SF Grit		100010	Returnable Consumable			25.00		
WIND100	)	Shop Fan		100013	Durable			1.00		
WIND100	)	Shop Fan		100014	Durable			1.00		
WIND100	)	Shop Fan		100015	Durable			1.00		
WIND100	)	Shop Fan		100016	Durable			1.00		
WIND100	)	Shop Fan		100017	Durable			1.00		
WIND100	)	Shop Fan		100018	Durable			1.00		_
WIND100	)	Shop Fan		100019	Durable			1.00		
WIND100	)	Shop Fan		100020	Durable			1.00		
WIND100	)	Shop Fan		100021	Durable			1.00		 
WIND100	)	Shop Fan		100022	Durable			1.00		 
PT1800AI		1" Heavy Duty Impact Wrench	IW-0001	100023	Durable			1.00		 
PT1800AI		1" Heavy Duty Impact Wrench	IW-0002	100024	Durable			1.00		 
PT1800AI		1" Heavy Duty Impact Wrench	IW-0003	100025	Durable			1.00		

Then you will need to use the pull-downs and select what the headers are.



		Selec Identif	t Heade y Colur	er Row (Do nn (Drop-I	ub Dov	le-Cli vn M	ck) enu)		C
Part Number	Description	Serial Number	Parent_Key	Issue Behavior	Tag	Parent	Total Quantity	Units	
v	~	~	~	~	~	~	v	~	
	Description	Serial Number	Parent Key	Issue Behavior	Taq	Parent	Total Quantity	Units	
Customer ID	MED HD LATX TECH GLVS		100001	Consumable			50.00	1 Pair	
customer iD	LRG HD LATX TECH GLVS		100002	Consumable			50.00	1 Pair	
Description	XL HD LATX TECH GLVS		100003	Consumable			50.00	1 Pair	
Issue Behavior	Safety Glasses		100004	Consumable			25.00		
location	Face Shield		100005	Returnable Consumable			10.00		
	Ear Protectors		100006	Consumable			250.00	1 Pair	
Parent	Drill Bits		100007	Returnable Consumable			100.00		
Parent (Key)	Surface Conditioning disc M Grit		100008	Returnable Consumable			25.00		
Part Number	Surface Conditioning disc VF Grit		100009	Returnable Consumable			25.00		
Quantitu	Surface Conditioning disc SF Grit		100010	Returnable Consumable			25.00		
Quantity	Shop Fan		100013	Durable			1.00		
Serial Number	Shop Fan		100014	Durable			1.00		
Tag	Shop Fan		100015	Durable			1.00		
Unite	Shop Fan		100016	Durable			1.00		
*****	Shop Fan		100017	Durable			1.00		
WIND100	Shop Fan		100018	Durable			1.00		
WIND100	Shop Fan		100019	Durable			1.00		
WIND100	Shop Fan		100020	Durable			1.00		
WIND100	Shop Fan		100021	Durable			1.00		
WIND100	Shop Fan		100022	Durable			1.00		
PT1800AL	1" Heavy Duty Impact Wrench	IW-0001	100023	Durable			1.00		
PT1800AL	1" Heavy Duty Impact Wrench	IW-0002	100024	Durable			1.00		
DT1000A1	1" Home: Duty Impact Wrench	IW-0003	100025	Durable			1.00		

Once you have this selected, you can click on the Import Button  $\checkmark$ , or you can click on the X to cancel. The tools should now be added to the crib.



#### Portal

As of version 9.13.8.0314, you can import tools directly into the Portal and the number of tools can be greater than 100.

1. On the main screen of the portal, click the **Main Menu** button, which looks like a gear.

S	nej	Portal Portal
	6/6	
Q		
	Part Number	Details
!	AW1015DHK	Set, Wrench, L-Shape, Hex (15 pcs. In BHK15 Metal Index) (.028" to 3/8") Maint Overdue
!	AW1015DHK	Set, Wrench, L-Shape, Hex (15 pcs. In BHK15 Metal Index) (.028" to 3/8") Maint Overdue
!	AW1015DHK	Set, Wrench, L-Shape, Hex (15 pcs. In BHK15 Metal Index) (.028" to 3/8") Maint Overdue
!	AW1015DHK	Set, Wrench, L-Shape, Hex (15 pcs. In BHK15 Metal Index) (.028" to 3/8") Maint Overdue
!	AW1015DHK	Set, Wrench, L-Shape, Hex (15 pcs. In BHK15 Metal Index) (.028" to 3/8") Maint Overdue
!	DAL234 The Pound	Dalmation Tool Conflict
Top Em	ployees with Issu	ed Tools Recent Events
		Time Action Part Number Employee Source Destination



2. Then click the **System Changes** button.

	Nain Menu
Inventory	Device Status
I/T Settings	System Changes
Troubleshooting	Voreme
About	



3. Then click the **Import Tools** button.



4. At this point you should be prompted to enter your admin credentials, and the process will be the same as in the Tool Crib section.


#### FlexHub

As of version 9.13.8.0314, you can import tools directly into the FlexHub and the number of tools can be greater than 100.

1. On the main screen of the FlexHub, click the **Main Menu** button, which looks like a gear.

STREPETTS & Z7ATOO1 Locker Hub		<i>Q</i>
	1	• 2
Part Number Details	3	. 4
	5	6
	7	8
	9	. 10
	11	• 12 TAGS / BAGS •
	Empty	

2. Then click the **System Changes** button.

С U	Main Menu 📀			
Inventory	Device Status	l/T Settings	System Changes	
Troubleshooting	Volume	About	1	



3. Then click the **Import Tools** button.

System Changes				
Change: Service Connection	Frame Configuration	Edit Compartment	Import: Tools	

4. At this point you should be prompted to enter your admin credentials, and the process will be the same as in the Tool Crib section.



## **Tool Statuses**

Statuses in the L5 Connect system exist to tie important information to a tool or device. This information can be about the general state of the ATC device or information that pertains to a specific instance of a tool, like tool needs calibration, tool lost, replacement requested, etc. This article will cover how to set up statuses within the L5 connect software and how to add and clear statuses on a device-by-device basis.



# Setup Tool Statuses within the L5 Connect Admin Client

Statuses within the L5 Connect system allow users to add additional information about the current state of an instance of a tool or device. Information such as, device offline, tool lost, calibration requested, etc. To set up and use these statuses, they must first be set up within the L5 Connect Admin client. Some status types are created with the installation of the admin client, and some of these status types cannot be edited. There are also custom statuses provided for customer use that can be edited.

Required Permission: Admin login to L5 Connect Admin Client & Superuser profile at the root location

When to use

- 1. Initial device setup at customer site
- 2. If the user needs additional statuses not created in the initial installation and setup of the ATC device.

#### Procedure

- 1. Open the L5 Connect Admin Client, and login using an Admin account. Navigate to the **Status types** screen, **Settings/System Configuration/Status Types**
- 2. Within the status types sub screen the user will see a list of status types to the left. The user will then click on the status type in which they desire to modify. After clicking on a status type the user will see information about the status type on the right side of the screen as shown below.



3. On this screen the user can modify many aspects of the status type including the name, background color, behavior, prompting the user, and what the status applies to whether tools in a device or the device itself. **NOTE: The names and Abbreviated name on some statuses cannot be changed, as they are a default status type within the L5 Connect System.** 



## There are also some placeholder statuses that can be changed by the user to fit any status type they may need, shown above as zCustom1-9

Follow along below for a brief description of the settings that can be changed about a specific status type:

- **Behavior**: A Status Type Behavior determines how the system alerts and reports the status when applied.
  - Info Only
    - Causes status indicator to appear on device tool lists (white Background with symbol; the symbol looks different with the device font)
    - Status abbreviation appears under the tool details on device tool lists
    - Status details appear in the tool's details screens
  - Managed Out of Box
    - Includes all "Info Only" behaviors
    - The tool is controlled outside of the device, and its alerts and issued conditions can be "suppressed."
    - Gray Background and @ symbol appear when a condition is being "covered")
  - Warning
    - Includes all "Info Only" behaviors
    - It plays an audio warning when issued
  - Alert
    - Includes all "Warning" behaviors
    - Shown on dashboards, front screens, etc.
    - Red Background with the ! symbol is displayed for tools with an alert status
- **Prompt to clear on return**: If checked, it will prompt the user to clear the status upon returning a tool to the device
- Prevent set when present: If checked it will prevent this status type from being set if the tool is still
  present within the device.
- **Andon Custom Behavior**: Allows the user to select the behavior of the Andon Light; either none, solid, or blink.
- Applies to Tools in: If a device is checked this status type can be applied to any tools within the checked device
- **Applies to Devices**: If a device is checked this status type can be applied to the checked device. **NOTE: a device must be online to set a status**
- Lock out tool issue when set on these devices: NOTE: This feature is currently only offered on the Tool Kiosk. If checked applying this status to a tool/tool(s) will lock out the tool, meaning the tool cannot be issued until the status is cleared.

After making modifications to the status type click the **Save** icon.



## Modifying Tool Statuses within the L5 Connect Admin Client

- 1. To modify tool statuses within the L5 Admin Client, navigate to either the **Tools menu, tool states menu, dashboard recent events, and the history tab.**
- 2. Double click the instance of a tool in which a user wishes to modify the statuses. This will open the Tool details window, proceed to the status sub-menu.
- 3. Another way to get to the tool details window is by right clicking on an instance of a tool.



## **Device Specific Procedures**

Listed below are the device specific procedures for applying and clearing a status to a tool. **NOTE: Any statuses applied by an admin user must be cleared by an admin user.** 

Required Permissions: Device User

### Kiosk

There are two ways a user of the Kiosk can apply or remove a status from a tool:

 For the first, login to the Kiosk and then click the settings button and navigate to inventory screen, Kiosk Menu/Settings/Inventory. The user will then click on the tool in which they wish to apply or remove a status. NOTE: If the user has not logged in at the Kiosk dashboard they will see a pencil icon in the top right corner, shown below. Click on the pencil icon, and scan your badge for to edit statuses.





After the user has logged in at the dashboard or scanned their badge for edit access, the user can then edit tool statuses, seeing a similar screen to that shown below.

NT001 Allen Wrench Set 297BB012			3
Inspection Requested 1/16/2024 1:24:53 PM (Socket, Sue )			
Info	ssued	Status	

If the user wishes to remove a currently applied status click on the delete button which is displayed as a red circle, this will grey out and strikethrough the status type. Finally click save.

Info	🍾 Issued	Status
Content		
NT001 Allen Wrench Set Z97BB012		



If the user wishes to add a status, click the green plus sign on the right side of the screen which will display the status types that can be applied to the tool. Select whichever status type applies, then click on the green checkmark to apply this status.

	NT001 Allen Wrench Set 29788012			
Current Cal. Req. Repair Req	Calibration Requested	Inspection Requested	Repair Requested	
	Replacement Requested			

 For the second method of adding or removing a status we will be returning a tool to the kiosk. Login to the kiosk and select the workflow option **Return**. Select an item to be returned to the kiosk and click the green check mark. The user will be met with the following screen, allowing the user to add a status by clicking the green plus.

	AT1429B2 MICROSHAVER CUTTER-CARB-3/8 Z97BB012	Select	status if needed:	
Current				
Cali 1/10	bration Requested 6/2024 2:03:56 PM (Socket, Sue )			

To remove a status click on the red circle to the left of the current status. Click the green checkmark at the bottom of screen when finished.



### Locker

There are two ways a user of the Locker can apply or remove a status from a tool.

 For the first method of adding or removing a status, log into the Locker and click on the settings button, navigating to the inventory screen. The user will then select the tool in which they wish to apply or remove a status. NOTE: If the user has not logged in at the Locker dashboard, they will see a pencil icon in the top right corner, shown below. Click on the pencil icon and scan your badge to edit the statuses. Shown below.



Click on the green plus to add a status or the red circle next to the status to remove. When completed, click the save icon.

2. The second method involves changing the tool status on the dashboard of the locker. For this method a tool must be issued from the locker. If a tool is on issue from the locker, it will be displayed on the dashboard as shown below.



Login to the locker and double click on the tool to modify the status applied. **NOTE: If the user has not logged in at the Portal dashboard, they will see a pencil icon in the top right corner. Click on the pencil icon and scan your badge to edit statuses.** After entering their credentials, the user can click on the



green plus to add a status or the red circle next to the status to remove. When completed, click the save icon.

### Portal

There are three ways a user of the Portal can apply or remove a status from a tool.

1. For the first, login at the Portal dashboard. Then click the settings button and navigate to inventory screen. The user will then click on the tool in which they wish to apply or remove a status. After selecting the tool, the user will see any status types currently tied to the tool. An example of this screen is shown below.



Image: Current       Calibration Reque         Current       Current         Current       Current         Current       Current         Current       Current         Current       Current         Current       Current         Current       Current <th>1 Wrench Set 2001 sted 57 AM (Socket, Sue )</th> <th></th> <th></th>	1 Wrench Set 2001 sted 57 AM (Socket, Sue )		
Info	Issued	Status	

NOTE: If the user has not logged in at the Portal dashboard they will see a pencil icon in the top right



corner, shown below. Click on the pencil icon and scan your badge to edit the statuses. Shown below.





If the user wants to remove a status click on the delete button to the left of the current status. If adding a status click on the green plus on the right side of the screen. The user will see a similar screen to that shown below.



When completed, click the save icon.



2. The second way a user can add or remove a status on a tool is by issuing or returning a tool to the portal. After logging into the portal, the dashboard will display either a list of tools leaving with the user or a list of tools to be returned to the portal. Either double click the tool or click the box to the left of the part number as shown below.

Soci	ket, Sue	Work Location				
L Me	L Me L All Users i 🔧					
Tools lea	aving with	me		<b>H</b>		
	Part Number	Details				
<b>~</b> ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	NT001	Allen Wrench Set Socket, Sue 1/17/2024 10:51 AM Cal. Req.		L L		
Tools rea	Tools returning to stock					
	Part Number	Details				
		*No Items				
•	- Check out	Rescan	Re	stock →		

3. The third way a status can be added or removed is from the poral dashboard. Without logging in the user can see a list of all tools on issue from the portal. From here the user can tap the wrench icon next to the tool to add a status. From this point the workflow of adding or removing a status is like that of method 2 described above.



## Toolbox

There are three ways a user of the Toolbox can apply or remove a status from a tool:

1. For the first, login to the Toolbox. Then click the settings button and navigate to inventory screen. The user will then click on the tool in which they wish to apply or remove a status. After selecting the tool, the user will see any status types currently tied to the tool. An example of this screen is shown below.

Current	A2A Adaptor, 3/8" Internal driv Z92BN006/Dwr 1	/e x 1/2" External drive, 1 5/	16"
Wrong To 1/16/2024	ol I 2:49:20 PM ()		
Info	🍾 Issued	! Status	<b>\$</b>

NOTE: If the user has not logged in at the Toolbox dashboard they will see a pencil icon in the top right corner, shown below. Click on the pencil icon and scan your badge to edit the statuses. Shown below.

Current	Adaptor, 3/8" Internal driv Z92BN006/Dwr 1	ve x 1/2" External drive, 1 5/	16"
Wrong 1 1/16/20	ool 24 2:49:20 PM ()		
Info	ssued 🍾	! Status	<b>\$</b>

The user can click on the green plus to add a status or the red circle next to the status to remove. When completed, click the save icon.



2. The second method of adding or removing a status to a tool can be found on the main dashboard of the Toolbox. This dashboard shows any tool currently checked out from the box along with any statuses applied to that tool. Click on the yellow wrench icon to the left of the part number as shown below. The user can also click on the red square with the exclamation point below the **Snap-on** logo to see all tools with statuses attached. Then the user can add or remove a status like shown in the methods above.





### Tool-Crib

There are two ways for a user to apply or remove statuses from a tool. The first can be done by any device user, while the second can only be done by a user with an attendant login.

1. Login to the Tool-Crib, and from the dashboard select the tool in which the user wishes to add or remove a status. Double click on an issued or present tool to attach or remove a status. The user will see the following screen.

Editing NT001 NT001 Allen Wrench Set 299LS001 Info Status Attachments			8
Current	Available		
Calibration Requested 1/16/2024 3:51:20 PM (Socket, Sue )	Calibration Requested	Inspection Requested	Lost
	Not Issued	Not Received	Not Returned
	Repair Requested	Replacement Requested	

To remove a status, look under the current column for any statuses currently applied and click on the delete button. To add a status, click on one or more of the statuses listed under the available column.

2. The second method of applying statuses or removing statuses from a tool can be done through the attendant login. First use an attendant login to access the Tool-Crib, and then click on the settings button. Next the user will navigate to the inventory screen, where every item in the Tool-Cribs inventory will be displayed. Select the item in which the user wishes to add or remove a status, the user will be met with a similar screen to what is shown in the first method. To remove a status, look under the current column for any statuses currently applied and click on the delete button. To add a status, click on one or more of the statuses listed under the available column.



## **Tool Status Reports**

The Tool States screen is a real-time view of the system. Unlike the Dashboard, these views are generated using the reporting engine of the system and thereby can be filtered. You can also apply a custom report to some views to find the exact information you want in real-time. There are two ways to access these reports within the admin client.

Access Point: L5 Connect Admin Client

Required Permission: Admin login to L5 Connect Admin Client

1. To access the tool status reports login to the L5 Connect Admin Client, and from the dashboard click on the **Tool States** tab. The user will see a similar screen to that shown below.

5 Snap-on L5 Connect Admin Client, v:9.1	12.1.1001											-	o ×
			Top Level			Chance C	urrent Loca	tion	SuperUser			Cli	ck to logou
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Status Issued Invento	ry   Maintenanc	e   In Process											
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Custom Reports 👻	Status										Auto-	) Refresh	Xlsx
Storage Location Name	Part Number	<ul> <li>Description</li> </ul>					Drawer	Tool ID	Status	<ul> <li>Employee</li> </ul>		Date Ap	plied
Tool Crib East	CTECHL1R240A	1/4" Drive Fixed - He	ad Aluminum Body	ControlTech <sup>™</sup> In	dustrial Torqu	e Wrench(1-20 ft - lb)		102959	Maintenance Overdue			2/23/2023	4:01:29 PM
Tool Crib East	CTECHL1R240A	1/4" Drive Fixed - He	ad Aluminum Body	ControlTech <sup>™</sup> In	dustrial Torqu	ue Wrench(1-20 ft - lb)		102916	Maintenance Overdue			2/23/2023	4:01:29 PM
Tool Crib East	CTECHL1R240A	1/4" Drive Fixed - He	ad Aluminum Body	ControlTech <sup>™</sup> In	dustrial Torqu	e Wrench(1-20 ft - lb)		100123	Maintenance Overdue			2/23/2023	4:01:29 PM
Tool Crib East	CTECHL1R240A	1/4" Drive Fixed - He	ad Aluminum Body	ControlTech <sup>™</sup> In	dustrial Torqu	e Wrench(1-20 ft - lb)		100005	Maintenance Overdue			2/23/2023	4:01:29 PM
Tool Crib East	DBTBM1	1 mm ThunderBit® N	Aetric High Speed S	iteel 135° Split Po	int Drill Bit			100012	Repair Requested	Plane Maintenance Ha	angar, Prestor	4/15/2021	3:33:24 PM
Tool Crib East	DBTBM12	12 mm ThunderBit®	Metric High Speed	Steel 135° Split P	oint Drill Bit			100015	Repair Requested	Plane Maintenance Ha	angar, Prestor	7/14/2022	9:01:51 AM
Tool Crib East	FAM11E	Socket Driver, Metric,	Hex, Standard, 11	mm				226864	Maintenance Overdue			10/10/2024	4 10:35:20 AM
Tool Crib East	QD2R100	Torque Wrench, Adj.	Click-type, U.S., Fix	ed-Ratchet, 20-1	00 ft. lb., 3/8'	' drive		103069	Maintenance Overdue			2/23/2023	4:01:29 PM
Tool Crib East	QD2R100	Torque Wrench, Adj.	Click-type, U.S., Fix	ed-Ratchet, 20-1	00 ft. lb., 3/8'	drive		102972	Maintenance Overdue			10/10/2024	4 3:20:12 PM
Tool Crib East	QD2R100	Torque Wrench, Adj.	Click-type, U.S., Fix	ed-Ratchet, 20-1	00 ft. lb., 3/8"	drive		102960	Maintenance Overdue			10/10/2024	4 3:20:12 PM
Tool Crib East	QD2R100	Torque Wrench, Adj.	Click-type, U.S., Fix	ed-Ratchet, 20-1	00 ft. lb., 3/8	drive		102917	Maintenance Overdue			10/10/2024	4 3:20:12 PM
Tool Crib East	QD2R1000	Torque Wrench, Adj.	Click-type, U.S., Fix	ed-Ratchet, 200-	1000 in. lb., 3	/8 <sup>-</sup> drive		100001	Maintenance Overdue			2/23/2023	4:01:29 PM
Tool Crib East	QD3R250	Torque Wrench, Adj.	Click-type, U.S., Fix	ed-Ratchet, 50-2	50 ft. lb., 1/2	drive		100002	Maintenance Overdue			10/13/2021	1 4:14:51 PM
Tool Crib East/Bottom	BADJC8	Wrench, Adjustable, (	Composite Handle,	Blue-Point®, 8"				102884	Repair Requested	Plane Maintenance Ha	angar, Prestor	12/21/202	1 2:39:30 PM
Tool Crib East/Row 1/Bin 1	QD3RM30	Torque Wrench, Adj.	Click-type, Metric,	Fixed-Ratchet, 6-	30 kgm, 1/2"	drive		100003	Maintenance Overdue			10/13/202	1 4:15:04 PM
Top Level	L5ATCPORTAL	<b>RFID Portal Emulator</b>						226865	Offline			10/15/2024	4 11:23:15 AI
Top Level	L5ATCPORTAL	<b>RFID Portal Emulator</b>						225864	Offline			2/29/2024	2:11:04 PM
Top Level	L5ATCPORTAL	RFID Portal Emulator						225864	Hardware Error			2/29/2024	2:07:34 PM
Top Level	LSATCPORTAL	<b>RFID Portal Emulator</b>						225767	Offline			3/6/2024 2	:18:53 PM
Top Level	SimulatorRFIDCab	RFID Cabinet Simulat	or					225777	Offline			10/14/2024	4 2:18:48 PM
Top Level	SimulatorRFIDCab	RFID Cabinet Simulat	or					225459	Offline			11/6/2023	4:19:54 PM
Top Level	SimulatorToolbox36	Toolbox Simulator 36	1					102458	Offline			10/14/2024	4 3:54:17 PM
Top Level	SimulatorToolbox36	Toolbox Simulator 36						102458	Maintenance Overdue			6/20/2022	3:52:54 PM
Top Level	SimulatorToolKiosk	Tool Kiosk Simulator						225765	Offline			10/23/2024	4 4:20:53 PM
Top Level	SimulatorToolReturn	Tool Return Simulato	r				1	102843	Offline			8/30/2022	7:59:46 AM
Top Level	ToolCrib	Tool Crib					1	225460	Offline			1/11/2024	4:21:45 PM
Top Level	ToolCrib	Tool Crib					1	215070	Offline			10/14/2024	4 1:55:44 PM
Top Level	ToolCrib	Tool Crib					1	100000	Calibration Requested	Plane Maintenance Ha	angar. Prestor	4/25/2022	11:29:49 AM
Top Level/Maintenance/Helicopter M	L5Ax36xxx	36" Optical Toolbox -	AC - Generation 3				1	100125	Offline			2/2/2022 2	:32:34 PM
Top Level/Maintenance/Helicopter M	L5Ax36xxx	36" Optical Toolhox -	AC - Generation 3					100125	Bad Drawer/Door State			12/2/2021	4:10:22 PM
Z91BJ001	AW1015DHK	Set. Wrench, L-Shape	Hex (15 pcs. In Bi	K15 Metal Index	) (.028" to 3/	8")	7	225427	Maintenance Overdue			10/14/2024	4 3:52:37 PM
791BI001	CTECHI 18240A	1/4" Drive Eixed - He	ad Aluminum Body	ControlTech <sup>™</sup> In	dustrial Toron	w Wrench(1-20 ft - lb)	r	102909	Maintenance Rending			10/14/202	4 3-52-37 PM

If the user wishes to export this list, click on the Save icon. This will export the list as an excel spreadsheet.



2. The second way a user can access the tool status reports is by navigating to the **Reports** tab within the L5 Connect Admin Client. On the left-hand side of the screen click on **Tool Status**, which will bring the user to the screen shown below. Click the run button to generate the report. **Note: Generating this report may** 

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	Description	This report lists the tools with statuses and what statuses	they currently hav	ve.		
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P-on L5 Connect Admin Client, v3 12.1.1001 Filtering Sticky Filters: Locati Run Time: 10/24/20 Storage Location Name Toel Crib East Toel Crib	on = Top Level 24 9:14 AM : Centr CTCHLIR240A D07EM1 CO22100 002210 0000 002210 0000 002210 00000 002210 000000 002210 00000000	Top Level Tool Start al Standard Time O Description Tam ThunderBit Attrict, Hes, Standard, 11 mm Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Click Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Lick Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Lick Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Lick Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Lick Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Lick Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Lick Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Lick Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Lick Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Lick Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Lick Styre, US, Fixed-Ratcht, 28-100 ft. lb, 3/8" d Torque Wrend, Ag, Lick Styre, US, Fixed-Ratcht, 59-200 Jb, 3/8" Ag Af	Drawer Tool ID 10005 100015 226854 10369 102772 10276 10284 100005 10284 100003 10284 100003 10284	Status     Maintenance Overdue     Offline	rUser	Lo-Refresh 2/2/2/2021 4:01:29 PM 10/10/2024 1:03:20 PM 10/10/2024 1:00 PM 10/10/204 1:00 PM 10/10/204 1:00 PM 10/10/204 1:00 PM 10/10/204 1:00 PM 10/10/
	on = Top Level 24 9:14 AM : Centr © Part Number CTEOL: R240A DBTBM1 DBTBM12 FAMTIE Q022100 Q02210 Q0220 Q0220 Q0220 Q0220 Q020 Q0	Top Level Tool Stat Standard Time Description Torout State Automatic State State State Torout State St	Drawer Tool ID 10005 10015 20059 10280 10280 10280 10280 10280 10280 10280 10280 10280 10280 10280 10280 10280 10280 10280 10280 10280 10080	Status     Maintenance Overdue     Overdue     Overdue     Overdue     Overdue     Overdue	rUser	Ko-Refresh      Xis      Ko-Refresh      Xis      Xi
P-on L5 Connect Admin Client, v9.12.1.1001 Filtering Sticky Filters: Locati Run Time: 10/24/20 Constant Storage Location Name Tool Crib East Tool Crib	on = Top Level     24 9:14 AM : Centr     24 9:14 AM : Centr     ①     Part Number     ①     CTECH1R240A     DBTEM1     DBTEM1     DDTEM12     FAM11E     ①     QD2100     ①     QD2100     ①     QD2100     ①     QD2100     ③     QD2100     ③     GD28230     ⑤     LSATCPORTAL     LSATCPORTAL     LSATCPORTAL     SATCPORTAL     SATC	Top Level  Tool Stat  Standard Time  Description  Tu' Drive Field - Head Aluminum Body ControlTech" Industrial Torque Tu' Drive Field - Head Aluminum Body ControlTech" Industrial Torque Tu' Drive Field - Head Aluminum Body ControlTech" Industrial Torque Tum TunderBite Metric High Speed Steel 135' Split Point Drill Bit Tam TunderBite Metric High Speed Steel 135' Split Point Drill Bit Concel Drive, Metric, Hegh Speed Steel 135' Split Point Drill Bit Torque Wrench, Ag. (Lick type, U.S., Fixed-Ratcht, 20-100 r. Ib., 37' d Torque Wrench, Ag. (Lick type, U.S. Fixed-Ratcht, 20-100 r. Ib., 37' d Torque Wrench, Ag. (Lick type, U.S. Fixed-Ratcht, 20-100 r. Ib., 37' d Torque Wrench, Ag. (Lick type, U.S. Fixed-Ratcht, 20-100 r. Ib., 37' d Torque Wrench, Ag. (Lick type, U.S. Fixed-Ratcht, 5.0 Jayn, 102' d RFD Portal Torulator Bit D Partal Torulator Bit D Partal Torulator Bit D Partal Torulator Bit D Partal Torulator	Tool ID 10005 100012 100015 102650 102870 102870 102870 102871 100001 100002 102844 100003 102844 100003 102844 100003 102844 100003 102844 100003 100003 100002 102844 100003 100002 100003 100002 100002 100002 100005 100005 100005 10005 10005 10005 10005 10005 10005 10005 10005 10005 10005 10005 10005 10005 10005 10005 100555 100555 100555 100555	Superior Status     Maintenance Overdue     Offline     Offline     Offline     Offline	rUser	
p-on L5 Connect Admin Client, v3 12.1.1001 Filtering Sticky Filters: Locati Run Time: 10/24/20 Storage Location Name Tool Crib East Tool Crib East T	on = Top Level 24 9:14 AM : Centr © Part Number CTECHIR240A DBTBM12 FATN 00221100 0022100 00200 000 00200 0000 000 0000 000 000 000 000 0000 00	Top Level  Tool Start  al Standard Time  O Description  1/2 Drive Fixed - Head Aluminum Body ControlTech <sup>™</sup> Industrial Torque  1 mm Thundreßt <sup>®</sup> Metric High Speed Steri 135 <sup>®</sup> Spilt Point Drill Bit  1 mm Thundreßt <sup>®</sup> Metric High Speed Steri 135 <sup>®</sup> Spilt Point Drill Bit Socket Drive, Metric, Hes, Standard, 11 mm  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Click-type, U.S, Fixed-Ratcht, 20-100 rt. lb, 3/8 <sup>®</sup> d  Torque Wrench, Ag, Mittarian  RD Portal Emulator  RD Portal Emulator  RD D Portal Emulator	Drawer         Tool ID           100035         100012           100012         100215           100215         102317           102317         100201           10284         100003           1225854         225854           225854         225854	Super     Status     Maintenance Overdue     Repair Requested     Maintenance Overdue     Offline     Offline     Offline     Offline	rUser	Local Content of
p-on IS Connect Admin Client, v3:12.1.1001 Filtering Sticky Filters: Locati Run Time: 10/24/20 ○ Storage Location Name Toel Crib East Toel Crib East T	on = Top Level 24 9:14 AM : Centr C = 24 9:14 AM : Centr C = 24 9:14 AM : Centr C = 24 9:14 AM : Centr C = 27 0 07 2100 02100 0200 0200 0	Top Level  Tool Start al Standard Time  Description  Tom TunderBits  Description  Tom TunderBits  Petro Fight Speed Steel 135: Spit Point Drill Bit  Tom TunderBits  Petro Fight Speed Steel 135: Spit Point Drill Bit  Socket Drive, Metric, Hes, Standard, 11 mm  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft, B., 3/2: d  Torgue Wrench, Ag, Click-type, US, Fixed-Ratcht, 20-100 ft	Drawer Tool ID 100015 100015 226854 102872 10287 102884	Super Status Maintenance Overdue Repair Requested Maintenance Overdue Maintenance Over	rUser	Lo- Control Co
p-on IS Connect Admin Client, v9.12.1.1001 Filtering Sticky Filters: Locati Run Time: 10/24/20 Storage Location Name Tool Crib East Tool Eveel Top Level Top Level Top Level Top Level	on = Top Level 24 9:14 AM : Centr CrtCHL1R240A DBTBMT DBTBMT DBTBMT2 FAMT1E 00221100 0022100 0022100 0022100 0022100 0022100 0022100 0022100 0022100 0022100 0022100 0022100 0022100 002220 SATCPORTAL ISATCPORTAL ISATCPORTAL ISATCPORTAL ISATCPORTAL ISATCPORTAL ISATCPORTAL ISATCPORTAL ISATCPORTAL ISATCPORTAL ISATCPORTAL ISATCPORTAL	Top Level  Tool Stat  al Standard Time  Description  1/4 Drive Fixed - Head Aluminum Body ControlTech** Industrial Torque Tim Thundreffits* Metric High Speed Steel 135' Split Point Drill Bit 12 mm Thundreffits* Metric High Speed Steel 135' Split Point Drill Bit 12 mm Thundreffits* Metric High Speed Steel 135' Split Point Drill Bit 12 mm Thundreffits* Metric High Speed Steel 135' Split Point Drill Bit 12 mm Thundreffits* Metric High Speed Steel 135' Split Point Drill Bit 12 mm Thundreffits* Metric High Speed Steel 135' Split Point Drill Bit 12 mm Thundreffits* Metric High Speed Steel 135' Split Point Drill Bit 12 mm Thundreffits* Metric High Speed Steel 135' Split Point Drill Bit 12 mm Thundreffits* Metric High Speed Steel 135' Split Point Drill Bit 12 mm Thundreffits* Metric High Speed Steel 135' Split Point Drill Bit 12 mm Thundreffits* Metric Rest Aducts* 28-100 m. Ib. 3/7' d Torque Wrench, Ag Click vype, U.S., Freed-Ratcht, 28-100 m. Ib. 3/7' d Wrench, Aglutable, Composite Handl, Bite-Point*, 8'' Torque Wrench, Ag Click vype, U.S., Freed-Ratcht, 5-10 Igm, 1/2' d BRD Portal Emulator BRD Portal Emulator BRD Portal Emulator BRD Defits* Simulator 36 Toobles Simulator 36	CUS  Tool ID  Tooos  To	Supe     Status     Maintenance Overdue     Repair Requested     Maintenance Overdue     Offline     Offline     Offline     Offline     Offline     Offline     Offline	rUser	Loc-Refresh      L
Poin LS Connect Admin Client, v3 12.1.1001           Filtering           Filtering           Sticky Filters: Locati Run Time: 10/24/20           Storage Location Name           Teol Crib East           Teol Crib East <td>on = Top Level 24 9:14 AM : Centr 24 9:14 AM : Centr 0 Part Number CTECH1R240A DBTBM1</td> <td>Top Level  Tool Start  al Standard Time  O Description  T/2 Drive Fixed - Head Aluminum Body ControlTech** Industrial Torque Timm Thundrefits* Metric High Speed Steri 135* Split Point Dill Bit Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Ster, Market, Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Ster, Market, Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Ster, Ib., Ster, Ib.</td> <td>Drawer Tool ID 100003 100012 100012 100012 102972 102960 102972 102960 102972 102960 102972 102960 102972 102960 102972 102960 102950 223864 223864 223864 223864 223864 223865 223856 22356 22356 22356 22356 22356 22356 22356 22356 22356 22356 2235</td> <td>Super     Super     Status     Maintenance Overdue     Offline     Offline     Offline     Offline     Offline     Offline</td> <td>rUser</td> <td>Local Content of /td>	on = Top Level 24 9:14 AM : Centr 24 9:14 AM : Centr 0 Part Number CTECH1R240A DBTBM1	Top Level  Tool Start  al Standard Time  O Description  T/2 Drive Fixed - Head Aluminum Body ControlTech** Industrial Torque Timm Thundrefits* Metric High Speed Steri 135* Split Point Dill Bit Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed Ratcht, 28-100 Ft, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Click type, U.S., Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Ster, Market, Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Ster, Market, Fixed-Ratcht, 28-100 Ht, Ib., 3/8* d Torque Wrench, Ag. Ster, Ib., Ster, Ib.	Drawer Tool ID 100003 100012 100012 100012 102972 102960 102972 102960 102972 102960 102972 102960 102972 102960 102972 102960 102950 223864 223864 223864 223864 223864 223865 223856 22356 22356 22356 22356 22356 22356 22356 22356 22356 22356 2235	Super     Super     Status     Maintenance Overdue     Offline     Offline     Offline     Offline     Offline     Offline	rUser	Local Content of
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The user can then export or print the report from this page, using the **Export** button that looks like a blue disk after selecting the file type.



## **Tool Status Notifications**

When a device has issues, you may not be around to see it. Subscriptions allow you to stay informed about what is happening with your L5 Connect<sup>™</sup> service. Subscriptions are automated messages that are generated based on status. It can be sent either via e-mail or an SMS Text Message **(US Carriers ONLY FOR TEXT)**.

## NOTE: You will need to have set up the SMTP settings and email addresses of the intended recipients beforehand if these notifications are e-mailed. See the SMTP Configuration document for more details.

Tool status notifications can be setup from multiple places in the L5 Connect<sup>™</sup> admin application, but the process always consists of first picking the part of the location tree for which you want notifications and then selecting who should receive the notifications. The second part of the process consists of defining how the notification will be delivered and what statuses will actually trigger the notifications.



## Configuration from Locations Tab

If you wanted to set up tool status for a certain part of your organizational tree, you could create a tool status notification from the locations tab. For instance, if you were the manager of the **Helicopter Maintenance Hangar**, you could create a notification to notify you any time a tool under that location was tagged as lost.

Log into the admin application and go to the **Locations** tab. Then select the **Helicopter Maintenance Hangar** location from the locations tree.

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Then select the **Subscriptions** sub-tab for that location.

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Click the **New** button.

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Now you need to select whether you want to notify an **Employee** or a **Group** of employees. In this case we will choose to notify an **Employee**. After selecting the radio button for **Employee** select the specific employee from the pull-down list of employees. Finally click the blue **Save** button.



Now follow the procedure in the Configuration of Notification Delivery and Triggers section.



## Configuration from Employees Tab

If you wish to create a notification for a specific employee, you can do that from the **Employees** tab. Go to the **Employees** tab and then select the employee to whom you wish to assign a notification.

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Then select the **Subscriptions** sub-tab.

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Click the **New** button.

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Select the location in the location tree that corresponds to the part of the system for which you want to receive notifications. Then click the **OK** button that looks like a green checkmark.



Now follow the procedure in the Configuration of Notification Delivery and Triggers section.



# Configuration from Groups Tab

If you wish to create a notification for a group of employees, you can do that from the **Groups** tab. Go to the **Groups** tab and then select the group to which you would like to assign a notification. The employees in the group will need to have their personal information configured properly to receive email or text message notifications.

15 Snap-on L5 Connect Admin Client, v:9.12.1.1001					- a ×
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Maintenance		· ·· · · ·			
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Show Deleted Items					

Then select the **Subscriptions** sub-tab.

45 Snap-on L5 Connect Admin Client, v:9.12.1.1001											- a ×
Son	$\overline{n}$	Top Level	Top Level Change Current Location					Click to logout			
Bucjoe		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
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Click the **New** button. Notice that in this case you aren't required to select a location from the location tree for the notification as with the employee tab scenario. The group notification will be applied to the current location filter of the admin creating the notification automatically.



Now follow the procedure in the Configuration of Notification Delivery and Triggers section.



## Configuration of Notification Delivery and Triggers

Whether you create a notification from the locations tab, the employees tab, or the groups tab, you will eventually have to configure how the notifications will be delivered and what statuses will trigger the notifications. This section will cover that part of the process.

You can configure the notification to send emails, text messages, or both emails and text messages. The first set of configurable options are for email notification and the second set are for text notification. For each of these notification types you can select to receive notifications about all statuses, all statuses that cause an alert, or individually select specific statuses.

For this example, we will choose to receive both email and text notifications about tools that have a **Lost** status applied to them. In the **Email Events** status list, select the checkbox for the **Lost** status. Then in the \**Text Events* status list, select the checkbox for the **Lost** status. Then click the blue **Save** button to save your new notification.



Click the **OK** button.





We have configured this notification to send an email and text notification any time a tool in a device under the selected location gets marked with a **Lost** status.

NOTE: For e-mail notifications to be sent, the L5 Connect system must be configured for an SMTP server as stated above and the employee must have been configured to have an email address. The employee must have been configured to have a cell provider and phone number to receive text notifications.



## Verifications

The goal of the camera verification process is to allow administrators/superusers of the L5 Connect Admin Client to require visual verification of any tool(s) or kit(s) condition when issued and/or returned to its device. For example, these steps could be ensuring that the settings are reset on a tool or cleaned before returning it. It could also verify that a kit being issued or returned is not missing anything. **Currently Image verification is only supported for the ToolCrib SEAT devices.** 

NOTE: All Verifications are global and can be assigned to any Master once created.

## Setup Verifications within L5 Admin Client

## **Creating Verifications**

- 1. Open the L5 Admin Client, and complete User login
- 2. Navigate to Settings=>System Configuration=>Verifications.





3. This will bring up the **Verifications Dialog Screen**. From this screen, you will need to create a new verification that instructs the employees on what you want them to do when they issue or return the item(s). Click on the green plus button.

	Select new value: Verification at Tool Issue
۹ 🛛 💌	
Name	
Verification Required	

- 4. You will now see the Verification Creation Sub-screen. You can define several properties here:
  - o Name The Verification name that will show in the list on the left.
  - Description A description of what the Verification does.
  - User Text The text that will display when the Verification runs.
  - Photo an optional photo that will display during Verification.

	Venications	
R Name	Verification Image Required Verification Image Required	<b>M</b>
Verification Image Required Verification Required Verify Contents	Verification Image Required   Mife Assigned Master Tools   Verification Image Required   Photo  Description  Capture Verification Image Required  Verification Image Required  Verification Image Required  Tool Crib Only - Additional Hardware Required	

If the user wants to have text in multiple languages, press the globe button.



	Verifications 😣
Name Verification Image Required Verification Required Verify Contents	Verification Required         Verification Required         Description         Due Verification Required         Dual User Verif
	Verifications
Name Verification image Required Verify Contants	Verification Required Verification Required Verification Required Verification Required Verification Required Verification Image Required Verification Required
	Verifications
Name Name Verification Image Required Verify Contents	Verification Regulard Verification Regulard Verification Regulard User Tex Verification Regulard User Tex Verification Regulard Verification Image Regulard Verification I



A photo is good to have so that when someone is issued the set, they can see what is supposed to be in it. To add a photo, click on the **pencil** button. You will then be prompted to select your image.



Use the file dialog box to select a verification image and click on the open button.



A preview of the uploaded image will be shown within the photo box as shown below.

	Verifications	
Name Verification Image Required Verification Required	Verification Required Verification Required	
Verify Contents	Name Verification Required Description Verification Required User Text  User Verify Required Tool Crib Only - Additional Hardware Required Verification Image Required Tool Crib Only - Additional Hardware Required	Photo ×



The picture will then be shown on the verification screen. Click the Save button when you are done.

Verifications		
Name Verification Image Required Verification Required	Verification Required Verification Required	
Verify Contents	Name Verification Required Description Verification Required User Text Verification Required Dual User Verify Required Verification Image Required Tool Crib Only - Additional Hardware Required	Photo X

#### **Dual User Verification**

If the user needs to have a second person validate the Verification, check the box by **Dual User Verify Required** (Supported devices: Locker & Toolbox). This will require a second permissioned user to confirm the Verification.

#### Verification Image Required

The verification image feature uses an external camera to store an image of the tool(s) issued or returned by the user during verification. The images captured will be displayed within the **History** tab of the L5 Connect Admin Client. **NOTE: The Verification Image Required feature is currently only available on the Tool Crib and requires additional hardware (camera and mount).** To add image verification to a verification type, click on the **Verification** 



Image Required checkbox.

	Verifications	
Name     Verification Image Required     Verification Required     Verify Contents	Verification Image Required Verification Image Required	
	Name Verification Image Required Description Verification Image Required User Text ©© Capture Verification Image Dual User Verify Required □ Verification Image Required □ Verification Image Required □ Verification Image Required □	Photo

#### Special Installers

The Camera verification feature in a ToolCrib or ToolCrib SEAT device(s) will require the installation of additional libraries for functionality. Please follow along with the steps below for the installation procedure for these libraries.

1. Contact Snap-on Industrial Pro-Services to obtain a download link containing the required installer files. You will see four files shown below.

$\square$	Name $\checkmark$	Modified $\vee$	Modified By $\smallsetminus$	+ Add column
	AdminClient_Camera_Support_Installer.msi	6 days ago	Lipsey, Matthew J	
	AdminClient_LocalUser_Camera_Support_Installer.msi	6 days ago	Lipsey, Matthew J	
	Installer_OpenCVS_Portal.msi	6 days ago	Lipsey, Matthew J	
	Installer_OpenCVS_ToolCrib.msi	6 days ago	Lipsey, Matthew J	

2. Download the file(s) that you need.

Tool Crib: Installer\_OpenCVS\_ToolCrib.msi (requires admin credentials)

Tool Crib seat (all users install): AdminClient\_Camera\_Support\_Installer.msi (requires admin credentials) Tool Crib seat (local user install): AdminClient\_LocalUser\_Camera\_Support\_Installer.msi Note: the admin client support installers are ONLY required if the user is performing verifications on a tool crib seat launched through the admin client.

Double click to start the installation. If the main target program is not already installed on the machine, you



will see an error message like below:

L5 C L5 Connect Admin Client (Local User) Camera Support	×
L5 Connect Admin Client (local user) program was not found. Aborting installation.	cal
ОК	

#### **Camera Diagnostics**

The camera diagnostics sub menu provides a live feed from the cameras on the device. This screen can be used for camera setup and adjustment.

#### Access Point(s)

- L5 Connect Admin Client Admin Client Dashboard/Settings/Diagnostics/Diagnostics:Camera
- L5 Connect TrueCrib After attendant login; TrueCrib Dashboard/Settings/Diagnostics/Diagnostics:Camera

#### **Required Permissions**

- Admin Client Access Edit
- Diagnostics


### Assigning Verifications to Tools

To view which tools have been assigned a given verification type click on the Assigned Master Tools tab within the Verification sub-screen as shown below.

	Verifications		
Name	Ver Contents		
Verification Image Required Verification Required	Info Assigned Master Tools		
Verify Contents	Name     Verify Contents       Description     Verify Contents       User Text     Please Check for Missing Contents       Dual User Verify Required □     Verification Image Required □       Verification Image Required □     Tool Crib Only - Additional Hardware Required	Photo	

This will show a list with four columns of data: Part number, Description, Issued, and Return. Any item that requires that specific verification type will have a checked box in the issued or returned column. **NOTE: Both Issued and return check boxes can be filled.** The user can also add verifications to other tools within this list by clicking the



issued or return checkbox.

#### Verifications

~	Info	Capture Image Assigned Mas	+ No Picture Verification			
			⊘ Description	Issued	Return	
		LockerPN03	Locker Tool 3	$\bigcirc$	V	^
		LockerPN04	Locker Tool 4	5	5	
		LockerPN02	Locker Tool 2	5	5	
		LockerPN01	Locker Tool 1	5	5	
		00TestKit	Quick kit for test demos		L,	
		A2A	Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16"		L I	
		TestPN039	TestDesc039			
		TestPN040	TestDesc040			

You can assign a single verification to multiple master tools from the verifications screen like shown above, or you can assign a verification to issue/return from the master tool screen as shown below.

Dual arrows on the Assigned Master Tools sub tab indicates that a different verification is already assigned to that master tool.

The issue and the return verification type can be different from one another if required.

NOTE: If verification is required on issue and return then repeat this process with whichever mode was not selected.



	Top Level SuperUser	
STELLED	Change Current Location	Click to logout
	Dashboard, Locations, Tools, Tool States, Employees, Groups, History, Benorts, Settings	
	Connection Connection and Connection Connectica Connect	
	NTG1	
Part Number v	New tool 001	
LDH562	3	
LDH582	Info Instances Maintenance Contained In Quantity Monitoring Attachments Optical Toolbox	
LDH602	Part Number NT001	
LDH662	Description New tool 001	
LDH682	Issue Behavior Durable	
LDH702		
LDH722	Units	
NT001		
NYZ001		
NYZ012	Verifications	
NYZ014	Issued O X	
NYZ7000S		
NYZ7004VB	Neturn V	
NYZ7006MG	contical Toolbox	
NYZ700AD NYZ7025H50		
NYZ7026EH	Default Tolerance	
PB434HD		
PT1800AL		
SimulatorToolbox54		
TTL-300-DTGK		
WIND100		
WMH140170		
WMH140172		
Station	Top Level Change Current Location	Click to logout
जित्त्वाचि	Top Level Change Current Location SuperViser	Click to logout
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	Top Level     Change Current Location     SuperUser       Dashboard     Locations     Tool States     Employees     Groups     History     Reports     Settings       NT001     NT001     Image: Setting Seting Setting Setting Setting Settin	Click to logout
Part Number	Image: Change Current Location     SuperUser       Dashboard     Locations     Tool States     Employees     Groups     History     Reports     Settings       NT001 New tool 001     New tool 001	Click to logout
Part Number	Top Level Change Current Location SuperUser           Dashboard         Locations         Tool States         Employees         Groups         History         Reports         Settings           NT001 New tool 001         NT001         New tool 001         New tool 00	Click to logout
Part Number	Top Level Change Current Location SuperUser           NTOO1         NTOO1           New tool 001         Guantity Monitoring         Attachments         Optical Toolbox	Click to logout
Part Number	Top Level Change Current Location Dashboard Locations ToolS Tool States Employees Groups History Reports Settings  NTDO1 New tool D01 Indo Instances Maintenance Contained In Quantity Monitoring Attachments Optical Toolbox Part Number N1001 (Photo	Click to logout
Part Number LDH552 LDH552 LDH602 LDH642 LDH642 LDH622	NT001 New tool 001     Quantity Monitoring     Attachments     Optical Toolbox       Part Number     Maintenance     Contained In     Quantity Monitoring     Attachments       Part Number     Monitoring     Attachments     Optical Toolbox	Click to logout
Part Number LDH562 LDH562 LDH642 LDH642 LDH642 LDH642	Image Super Location     Super Location       NT001     New tool 001       Image Instances     Contained in Quantity Monitoring       Attachments     Optical Toolbox	Click to logour
Part Number           LDH562           LDH562           LDH662           LDH702	Image: Contract Location     Tool States     Employees     Groups     History     Reports     Settings       NT001 New tool 001     New tool 001     New tool 001     Part Number N1001     Photo       Part Number New tool 001     Issue Behavior Durable     Photo     Photo	Click to logout
Part Number           LDH562           LDH562           LDH662           LDH662           LDH662           LDH662           LDH662           LDH702           LDH702           LDH702	Top Level     Change Current Location     SuperUser       Dashboard     Locations     Tool States     Employees     Groups     History     Reports     Settings       NT001 New tool 001     New tool 001     Part Number     Optical Toolbox     Part Number     Photo       Pastription     New tool 001     Photo     Photo     Photo       Units     Description     Part Outable     Photo	Click to logout
Part Number           LDH562           LDH562           LDH662           LDH662           LDH662           LDH672           LDH772           LDH722           LDH762	Info     Instances     Maintenance     Contained in     Quantity Monitoring     Attachments     Optical Toolbox       Part Number     Info     Instances     Contained in     Quantity Monitoring     Attachments     Optical Toolbox       Part Number     Info     Instances     Dashboard     Contained in     Quantity Monitoring       Info     Instances     Maintenance     Contained in     Quantity Monitoring     Attachments     Optical Toolbox       Part Number     Info     Instances     Dashboard     Info     Instances       Units     Image     Image     Image     Image       Tag     Image     Image     Image	Click to logout
Image: Constraint of the second sec	Image Current Location     SuperViser       Dashboard     Locations     Tool States     Employees     Groups     History     Reports     Settings       NT001 New tool 001     New tool 001     Image Current Location     Optical Toolbox     Part Number     Photo       Part Number     Ntition     Photo     Photo     Photo       Units     Image Current Location     Image Current Location     Image Current Location	Click to logour
Part Number           LDH562           LDH562           LDH662           LDH662           LDH662           LDH762           LDH762           NT001           NYZ014	Image Current Location     SuperViser       Dashboard     Locations     Tool States     Employees     Groups     History     Reports     Settings       NT001 New tool 001     New tool 001     Part Number (N1001 Description New tool 001     Optical Toolbox       Part Number (N1001 Description New tool 001     Photo     Photo       Units     X     Y       Tag     X     Y       Verifications     X     Y	Click to logour
Part Number           LDH562           LDH662           LDH662           LDH662           LDH662           LDH662           LDH662           LDH702           LDH702           NYZ0101           NYZ2012           NYZ014           NYZ7014           NYZ7014	Info     Instances     Maintenance     Contained in     Quantity Monitoring     Attachments     Optical Toolbox       Part Number     New tool 001     Issue Behavior     Dashe     Photo       Units     Image     Image     Image     Image       Verifications     Image     Image     Image     Image	Click to logout
Part Number           LDH562           LDH582           LDH662           LDH662           LDH662           LDH662           LDH62           LDH702           LDH702           LDH703           NYZ011           NYZ012           NYZ014           NYZ700MDKIT           NYZ7005	Change Current Location         SuperUser         Dashboard       Locations       Tools       Compose Groups History Reports Settings         NTOOI New tool 001         Part Number INTOOI Description New tool 001         Juntos         Part Number INTOOI Description New tool 001       Photo         Units       Part Same       Photo         Verifications       Issued Verification Required () ×       X         Return Verification Required () ×       X	Click to logout
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Part Number           LDH562           LDH582           LDH662           LDH662           LDH662           LDH772           LDH772           LDH772           LDH772           LDH772           LDH772           LDH722           LDH723           LDH724           NYZ010           NYZ700MDKIT           NYZ700AVB           NYZ700AD           NYZ7025H50           NYZ7025H1           PY1800AL           SimulatorToolbox54           ToolCrib           TI-300-DTGK	Top Level       Change Current Location         Dashboard       Locations       Tool States         Employees       Groups       History       Reports         NTGO1 New tool 001       New tool 001       Polical Toolbox         Part Number       Maintenance       Contained In       Quantity Monitoring       Attachments       Optical Toolbox         Part Number       Maintenance       Contained In       Quantity Monitoring       Attachments       Optical Toolbox         Part Number       Maintenance       Contained In       Quantity Monitoring       Attachments       Optical Toolbox         Part Number       Maintenance       Contained In       Quantity Monitoring       Attachments       Optical Toolbox         Part Number       Maintenance       Maintenance       Maintenance       Maintenance       Maintenance         Verifications       Return       Verification Required (P ×)       X       X       X         Default Tolerance       Optical Toolbox       Default Tolerance       X       X	Click to logout
Part Number         X           Part Number         X           LDH582         X           LDH602         X           LDH62         X           LDH62         X           LDH62         X           LDH772         X           LDH782         X           LDH792         X           LDH792         X           NYZ01         NYZ01           NYZ700MDKIT         NYZ7004VB           NYZ7004VB         NYZ7006MG           NYZ7025H50         NYZ7025H50           NYZ7025H50         NYZ7025H5           NYZ7025H50         NYZ7025H5           PT1800AL         SimulatorToolbox54           ToolCrib         Ttr.300-DT6K           WWN0100         NMAUM 0770	Top Level       Change Current Location         Dashboard       Locations       Tool States       Employees       Groups       History       Reports       Settings         NTOO1 New tool 001       Number       NTOO1 New tool 001       Photo       Photo       Photo         Part Number       NTOO1 Issue Behavior       Durable       Photo       Photo       Photo         Verifications       Issued Verification Required       X       Image Current Location       Image Current Location         Optical Toolbox       Default Tolerance       Image Current Location       Image Current Location       Image Current Location	
Image: Control of the second	Top Level       Charge Current Location       SuperUser         Dashboard       Locations       Tools       Tools       Tools         NTOOI New tool 001       New tool 001       Part Number (NT001 Description New tool 001       Photo       Photo         Units       C       C       C       C       C       C         Verifications       C       C       C       C       C       C         Optical Toolbox       Default Tolerance       C       C       C       C       C       C	
Part Number           LDH562           LDH582           LDH662           LDH662           LDH662           LDH662           LDH672           LDH762           NT201           NYZ201           NYZ201           NYZ201           NYZ201           NYZ700MDKIT           NYZ700AD           NYZ700AD           NYZ7026EH           PB434HD           PT1800AL           SimulatorToolbox54           ToolCrib           TTa-30-DT6K           WiND100           WMH140172           WMH140174	Image Current Location       SuperUser         Dashboard       Locations       Tools         Image Current Location       Tools       Tools         Image Current Location       Optical Toolbox       Tools         Part Number (MT00)       Description New tool 001       Tools         Issues Behavior       Durable       Photo         Units (2) X       X       (2) X         Verifications       X       (2) X         Issued Verification Required (2) X       X         Default Tolerance       X	
Part Number           LDH562           LDH582           LDH642           LDH642           LDH642           LDH642           LDH702           LDH702           LDH703           NYZ014           NYZ700MDKIT           NYZ700AD           NYZ700AD           NYZ7025H50           NYZ7026H           PH384HD           PT1800AL           Simulator/foolbox54           ToolCfb           TTL-300-DT6K           WiMH140170           WMH140177           WMH140178	Top Level       Change Current Location       SuperViser         Dashbaard       Locations       Tool States       Employees       Groups       History       Reports       Settings         NTOOI New tool 001       Not tool 001       Description       Not tool 001       Photo       Photo         Units       Image       Ima	

Once assigned, the Verifications will run each time this tool is issued or returned. **Verifications will be applied to all tool instances of the Master Tool in which verifications are assigned**. When the tool is issued or returned, the Employee will be prompted with an audio prompt warning and the following screen. Verification steps specific to each device type are contained in the Device Specific Procedures section below.





The tool status can also be cleared or changed by clicking on the status button on the verification screen. Click on the status button as shown below.



Now within the status tab the user can set or clear statuses on the tool being verified. To add a status to the tool being verified click any one or more of the status options listed under the available column. The status will now be shown under the current column with a red circular icon with a white strikethrough at a 45 degree angle.



Editing NT001 NT001 Allen Wrench Set 299(500)			3
Current Inspection Requested 1/2/2024 1:04:13 PM (Mechanic, Mike ) Repair Requested Repair Requested (Mechanic, Mike )	Available Calibration Requested	Inspection Requested	Lost
Replacement Regulated International Action (Replacement Regulated Internation (Regulated Internatio	Not Available	Not Issued	Not Received
	Not Returned	Out For Maintenance	Out for Replace or Repair
	Repair Requested	Replacement Requested	

To remove a status to the tool being verified click any one or more of red icons to the left of the status options listed under the current column. This will remove the status from the list of those currently applied to the tool on the left and back into the available tab on the right.



## Verification Operation

The workflow for verifications between devices is fairly similar. All device specific behaviors will be specified later in this document.

### Verification Prompt

All ATC devices will display a similar verification prompt with a purple question mark, shown below.

y. superoser			Issue Mode Issuing 1 Quantity Available: 0	
1 2 1	21			
			NT001	
		Part Number ~	Allen Wrench Set	
Part Number	Details			
LDH582	3/4DR 12PT 1 13/16" SHL SKT		Quantity Available	
LDH602	3/4DR 12PT 1 7/8" SHL SKT		Home Location: Z99LS001	
LDH642	3/4DR 12PT 2" SHL SKT	+	sued: SuperUser (12/4/2023 3:33:16 PM)	
LDH662	3/4DR 12PT 2 1/16" SHL SKT		TooliD: 100186	
LDH682	3/4DR 12PT 2 1/8" SHL SKT			
LDH702	3/4DR 12PT 2 3/16" SHL SKT			
LDH722	3/4DR 12PT 2 1/4" SHL SKT	•		
LDH762	3/4DR 12PT 2 3/8" SHL SKT			
NYZ001	Blade NYROC 1"			
NYZ012	Blade NYROC 1/2"			
NYZ014	Blade NYROC 1/4"			
NYZ70005	Pneumatic Blade Sharpener			
NYZ7004VB	Antistatic Vacuum Bag			
NYZ7006MG	Gun - vibration		1	
NYZ700AD	Blade Sharpening Disc			
NYZ7025H50	Air Hose - 50'	+		
NYZ7026EH	Blade holder / Handle			

### **Dual User Verify Option**

Issue or return a tool from an ATC device, an item tagged for Dual User Verify will require **two** users to scan their badge. The first being the user that issued or returned the tool, with that screen shown below.





After the primary badge scan, a different user with machine access is required to scan their badge to complete the verification. The prompt button text will change to indicate awaiting the second scan as shown below.





### Bypass Dual User Verify

Dual user verify can be bypassed by a privileged user, with **bypass second badge verify** permissions. After the initial verification badge scan, the button prompt will change as shown below. The process can be completed by pressing the button to bypass or by performing the second badge scan normally.

#### **Dual User Verify Required**

✓ Press to bypass badge scan

### Verification Image Required

Issue or return a tool tagged for image verification from the Tool Crib, and click on the purple question mark shown above.

You will see a similar screen to that shown below with a live preview image right above the decline button.





Click on the live preview image to capture.

	Capture Verifcation Image	• 📀
NTOO1 Allen Wrench Set 299LS001 ToolID 100186		A REAL PROPERTY OF
$\checkmark$ Scan badge or press live image to retake	Status	! Decline

Either scan your badge to complete verification or press the live image to retake.

#### Switching Camera View in Admin Client/Tool Crib

Navigate to one Camera Diagnostics sub menu through one of the paths above.
 NOTE: If you see the screen below it means no camera support files have been installed. Complete the installation of the special installers before continuing.





If the required camera support files are installed you will see a similar screen to that shown below.



- 2. You will see a live camera preview as well as two buttons towards the top of the screen; **Rescan for cameras** & Change target camera.
  - o Rescan for cameras: Will rescan for any cameras not immediately identified on system start up.
  - Change target camera: Will change the target of the camera preview to the other identified camera.

#### Switching Camera View

#### Note: On device start up the cameras may not be identified in the same order as previously

- 1. Switching camera view can be accomplished through the normal image verification process. To begin, issue or return a tool that requires image verification, and open the verification image sub menu.
- 2. To switch camera used for this verification click on the **Change target camera** button to the right of the camera preview (shown below).

Note: This selection will be saved for the next time any image verification is used.





### Unsupported Device Behavior

If you use a verification with verification images on an unsupported device the device will act just like the option is not enabled. **NOTE: The Verification Image Required feature is currently only available on the Tool Crib with the additional hardware (camera and mount).** 

### Missing Camera Behavior

If a device is missing a camera and image verifications is required you will see the following message in place of the camera preview, shown below.



To complete verifications with a missing camera, continue with dual user verify.



### **Device Specific Behaviors**

### ATC FlexHub

#### Verification Required

- 1. Scan badge with RFID reader on the ATC FlexHub
- 2. Click on the tool/item(s) to issue or return to the ATC FlexHub. If an item is tagged for verification the user will be prompted with the following menu.

	<b>Return Verification</b>	$\overline{\mathbf{e}}$
96451 Infrared Thermometer Kiosk Prototype		
TooliD 122831		
✓ Scan badge to verify.	Status	! Decline



### Locker

#### Verification Required

#### Issue

- 1. Scan badge with RFID reader on the locker, successful login will cause the door on the locker to open.
- 2. Remove an item from the locker and the close the door. If any issued item is tagged for verification the user will be prompted with the following menu.

		Verification Required	
2	<b>ctb5172</b> 7.2V battery <i>Z64LN005</i>		
ToolID 100045			
🗸 Scan b	adge to verify.	Status	! Decline

3. If for any reason the verification is declined or skipped the user can return to the verification screen. To return to the verification screen, scan badge with RFID reader and click on the purple box with a question mark on the locker dashboard like shown above.

#### Return

- 1. Scan badge with RFID reader on the locker, successful login will cause the door on the locker to open.
- 2. If there are any tools tagged for verification issued out to the user a purple box with a question mark will appear in the top left under the Snap-on logo on the Locker dashboard. Click on this purple box and the user will be met with the verifications screen. Scan badge to verify, return the tool to the locker, and close the door.
- 3. If for any reason the verification is declined or skipped, the user will be met with the following message after closing the door.





Click **Yes** to reopen the door and verify the tool(s) being returned like shown in the previous step. If **No** is selected or after the timer runs out the user will be logged out and the verification will be recorded as skipped.



### Portal

### Verification Required

- 1. Scan badge with RFID reader on the Portal
- 2. Scan item(s) to issue or return to the portal. If an item is tagged for verification the user will be prompted with the following menu.
- 3. If for any reason the verification is declined or skipped the user can return to the verification screen. To return to the verification screen, click on the purple box with a question mark on the portal dashboard.





### Toolbox

#### Verification Required

- 1. Scan badge on toolbox RFID reader.
- 2. Now issue or return a tool/kit to the toolbox. Upon closing the drawer, the user will be met with the Verification menu as shown below. From here the user will again scan the badge on the RFID reader. NOTE: If the verification message is dismissed that will be reported in the devices log within the L5 Admin Client and a "Needs Verification" status will be applied to the tool. This status will remain until the tool is properly verified or is cleared by a permissioned user



3. If for any reason the verification is declined or skipped the user can return to the verification screen. To return to the verification screen, reopen the drawer in which the issued or returned tool is assigned. Once the drawer is opened the user will be met with the following prompt. Click on the purple question mark icon to return to the verification prompt.



### Tool-Crib

#### Verification Required

- 1. Scan badge with RFID reader on the Tool Crib.
- 2. Now issue or return a tool/kit to the Tool Crib. Once the item is issued or returned a purple question mark icon will appear on the left side of the screen. Click the purple box with a question mark.
- 3. When the tool is issued or returned, the Employee will be prompted with the following screen. **NOTE: The Tool-Crib forces the user to complete the verification process. Declining will return the user to their current session.**



If the user selected Image Verification Required, follow along with the above section)

4. Whenever the session is completed, the user will be prompted to address any pending verifications.



### Event Log

Any action taken on any device within the ATC system will be logged within the L5 Connect Admin Client, which can be found under the History tab. This event log will give the date, time, action taken, part number, Employee number, and the name of whatever device is accessed. This log will also show if the user completed the tool issue/return verification or not, showing this logged action with one of the following messages: **"Tool Issue Verified"**, **"Tool Return"**, **"Tool Issue Verification Skipped"**. Additionally on specific actions and devices an image may be saved and tied to that action taken, like the **verification images** on the **Tool-Crib**.





V Normal: Top Level 12/21/2023 - 12/28/2023 ⊙ Dwr ⊙ Part Number ⊙ Employee ⊙ Affected Employee ⊙ Source Location Date Action Destination Location Group 🕑 Info 🕑 Data 12/28/2023 1:28:14 PM Session compl Socket, Sue Socket, Su Z99L5001 12/28/2023 1:28:08 PM Tool Issued NTOO Socket, Sue Socket, Sue Z99LS001 12/28/2023 1:27:44 PM Issue verific Socket, Su 12/28/2023 1:27:44 PM Tool Issue Verified NT001 Socket, Sue Z99LS001 12/28/2023 1:20:57 PM Session started Socket, Sue Z99LS00 12/28/2023 1:11:59 PM Session compl Socket, Sue Socket, Sue Z99L5001 12/28/2023 1:11:54 PM Tool Is 12/28/2023 1:11:00 PM Issue NT001 12/28/2023 1:11:00 PM Tool Issue Verifie Socket, Sue Z99LS001 NT001

Socket, Su

Z99LS001

For Support/Service: INDPROSERVICES@snapon.com Copyright © 2025 Snap-on Industrial. All Rights Reserved

Socket, Sue

12/28/2023 1:01:33 PM Session starter



### **Tool Maintenances**

Some tools require regular maintenance or calibration. Keeping track of this can be cumbersome and tedious. Keeping accurate maintenance records can also prove challenging. L5 Connect<sup>™</sup> provides the ability to set up automated tracking, notification, and capturing historical records for these important functions. It can track what tools need to be serviced and how long the tools have gone without service. This is done by creating tool maintenance instances.

This document will discuss the configuration and usage of tool maintenances in the L5 Connect system. It will cover how to setup a maintenance types and how that differs from an instance of a maintenance type. It will cover how these maintenances behave on devices and their related statuses.



## Maintenance Types

A maintenance type describes what sort of maintenance is required to keep the tool functioning properly. It is assigned to a master tool in the L5 Connect system. Any instances of that master tool will then have this maintenance type applied to them. There are two built-in maintenance types in the system. Users can also create their own custom maintenance types.

### Built In Maintenance Types

There are two built-in maintenance types in the L5 Connect system. These are calibration and inspection. Many tools require regular calibration such as torque wrenches or measuring gauges. Tool inspections can be common for tools that frequently get chipped or worn down. These maintenance types, like any other user created ones, can be applied to multiple master tool types across the system.

### Custom Maintenance Types

Users can create their own custom maintenance types for use in their L5 Connect system.

1. To create a custom maintenance type, start the Admin application and go to the **Tools** tab.





2. Select the master tool for which you would like to assign your custom maintenance type and then click the Maintenance sub-tab.

5 Snap-on L5 Connect Admin Client, v:9.11.3.0903												o x
		Top Level						SuperUser				
ATTE TOP	977				Change	Current Loca	tion 💋 💋				Clic	k to logout
2		Dashboard	Locations	Tools	Tool States	Employees	Group	s History	History 2.0	Reports	Settings	
Q X	-											
•	FAM1	1F										
Part Number v	Socke	t Driver	lex, Standard, 1	1 mm								
dsasasd	3	- <b></b> -										
F704BCG			Y									
F711BCG	Info Instances	Maintenance	Contained	In   Qui	antity Monitori	ng Attac	hments	Optical Tool	xoo			
ECF201	Part Number FA	M11E					Phote	,	1			
EEDM504B3-LEAD-BLACK	Description Sc	ocket Driver, Metr	ic, Hex, Standa	rd, 11 mm	n							
EEDM504B3-LEAD-RED	Issue Behavior	Durable					Ĩ I					
EEDM604C												
EEDM604C BLACK CLIP	Units											
EEDM604C RED CLIP	_											
EETA503C	Tag	<u>/×e</u>										
F80												
FADH12A	Verifications —						ปป					
FAM10E	Irrund								1			
FAM11E	l											
FAM12E	Return											
FAM13E	L						J					
FAM14E	Optical Toolbox											
FAM4E												
FAM5E	Default Tolerance											
FAM6E	L						J					
FAM7E												
FAM8E												
FAM9E												
F&R2505												
Show Deleted Items												

3. If there are any maintenance types already assigned to this master tool they will appear here. To add a new maintenance type to this master tool, click the **New** button that looks like a green plus sign.

5 Snap-on L5 Connect Admin Client, v:9.11.3.0903												
		Top Level					🖉 🔊 s	uperUser				
	5	l .			Change	Current Location	1 🥬				Click	to logout
		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	History 2.0	Reports	Settings	
Q X												
•	FAM1	16										
Part Number v	Socket	Driver, Metric, I	lex, Standard, 1	I1 mm								
dsgsgsd	3											
E704BCG	Info Instances	Maintenance	Contained		ntity Monitori	ing Attache	ante 0	ntical Toolh	<b>av</b>			
E711BCG	into instances	Maintenance	contained	iii   Qua	intry wonton			prical looib	0.			
ECF201												
EEDM504B3-LEAD-BLACK												
EEDM504B3-LEAD-RED												
EEDM604C												
EEDM604C BLACK CLIP												
EEDM604C RED CLIP												
EETA503C												
F80												
FADH12A												
FAM10E												
FAM11E												
FAM12E												
FAM13E												
FAM14E												
FAM4E												
FAM5E												
FAM6E												
FAM7E												
FAM8E												
FAM9E												
FAR2505	Standard Maintenand	e Period (Requi	red) Used to ca	lculate ne	xt due date whe	en last maintena	ince date is	updated. (D	ue date can be	manually ove	erridden).	
Show Deleted Items		Warning Days b	efore due date	when ma	intenance pend	ling status is app	olied.					
	Initial Maintenand	e Period Days u	intil due date fo on if left empty.	or new too	l instances or e	xisting tools wh	en a new m	aintenance i	s created. Tools	will be auto	matically over	due at



4. This opens the **Maintenance Types** window. To add a new maintenance type, click the **New** button that looks like a green plus sign.

	Maintenance Types	3
Q X		
Name ~		
Calibration		
Inspection		
Toolbox 90 day maintenance Torque Calibration		
l <b>↓</b>		

5. Give the maintenance type a name and then click the **Save** button that looks like a blue disk.

Select type for new item						
Q Name	User Text S Cleaning					
Calibration Inspection Toolbox 90 day maintenance Torque Calibration						



6. If you need a multi-language display, you can click the **Edit Multiple Languages** button that looks like a globe and then check the **Enable Multiple Language Display** checkbox.



7. Then enter your translations for the supported languages and click the **OK** button.

2	Select ty	pe for new item
9	Info	
Name	- User Text Cleaning	
Calibration Cleaning Inspection Toolbox 90 day maintenance Torque Calibration	Name Mane Institut Spa Ger Fre Ita Japar Kor Portugi Chir	ultiple Language Display ish Limpleza an Reinigung ch Nettoyage an Puliza eyu==yy an Bata eyu==yy an Bata eyu==yy eyu=



8. The new maintenance type is now shown in the list of maintenance types. Make sure it is selected and then click the **OK** button that looks like a green check.

	Select type for new item
Q X	Info
Name	User Text 🕥 Cleaning
Calibration	
Cleaning	
Inspection	
Toolbox 90 day maintenance	
Torque Calibration	
	_

9. You can see that the cleaning maintenance type has been created and is in the process of being assigned to the selected tool type but more information is still needed.

- **Standard Maintenance Period** - (Required) Used to calculate next due date when last maintenance date is updated

- Warning (Days before due date) - Days before due date when Maintenance Pending status is applied to tool

- **Initial Maintenance Period** - Days until due date for new tool instances or existing tools when a new maintenance is created. Tools will be automatically overdue at creation if left empty.

Enter these fields and click the blue **Save** button.

	Top Level Change Current Location
	Dashboard Locations Tools Tool States Employees Groups History History 2.0 Reports Settings
Part Number EEDM604C	FAMTLE Socket Driver, Metric, Hex, Standard, 11 mm
EEDM604C BLACK CLIP EEDM604C RED CLIP EETA503C F80	Info Instances Maintenance Contained In Quantity Monitoring Attachments Optical Toolbox
FADH12A FAM10E FAM11E FAM12E	Cleaning Days 30 Standard Maintenance Period
FAM13E FAM14E FAM4E	2 Warning (Days before due date) Initial Maintenance Period
FAM5E FAM6E FAM7E	
FAM9E FAR2505 FB316B	
FB325A FLF80 FS081	
FS121 FS141 FS161	Standard Maintenance Period (Required) Used to calculate next due date when last maintenance date is updated. (Due date can be manually overridden). Warning Days before due date when maintenance pending status is applied.
Show Deleted Items	Initial Maintenance Period Uays until due date for new tool instances or existing tools when a new maintenance is created. Tools will be automatically overdue at creation if left empty.

You have now created a new custom maintenance type and assigned it to a master tool type with maintenance period data specific to that master tool. Every instance of the master tool edited will now have a cleaning maintenance assigned to it.



## **Tool Maintenance Statuses**

The system automatically sets and clears the **Maintenance Overdue** status based on the maintenance due date of each individual tool with that maintenance type. It will also apply a **Maintenance Pending** status as a warning that a tool is almost due for maintenance based on the **Warning** value configured in the maintenance type. This **Maintenance Pending** status will be automatically cleared when the tool becomes overdue or has the maintenance date updated.

Because the **Initial Maintenance Period** was left blank in the example above, each instance will now have a **Maintenance Overdue** status assigned to it. A switch to the **Instances** sub-tab will show that.

45 Snap-on L5 Connect Admin Client, v:9.11.3.0903				_								o ×
STATE	T	Top Level Change Current Location									Cli	ck to logout
		Dashboar	d Locations	Tools Tool	States Emplo	oyees G	Groups   H	listory	History	2.0 Reports	Settings	
Part Number EEDM604C EFDM604C RLACK CLIP	FAM1 Socke	11E et Driver, Metr	ic, Hex, Standard,	, 11 mm								
EEDM604C RED CLIP	Info Instances	Maintenan	ce Contained	l In Quantity	Monitoring	Attachmen	nts   Optio	al Too	olbox			
EETA503C	Show Deleter	d Items										
F80				0	0				<u></u>	0	0	
FADH12A	I Home L	ocation 🕑	Additional Info	User Label 2	<ul> <li>Serial Num</li> </ul>	iber 🕑 C	ustomer ID	Qty	(v) Issued	Work Location	I Kit	
FAM10E	Tool Crib East							1				
FAM11E	291BJ001							1				
FAM12E												_
FAM13E												
FAM14E												
FAMILE												
FAMSE												
FAMOL												
FAM8E												
FAM9E												
FAR2505												
FB316B												
FB325A												
FLF80												
F5081												
FS101												
F\$121												
Show Deleted Items												



This is also confirmed by looking at the device as well.

Stapen."	
Part Number Details	0
FAM11E     Socket Driver, Metric, Hex, Standard, 11 mm       Dwr 1     Maint Overdue	

The system does not know when these tools were last cleaned and can't calculate the next maintenance date. It sets the status so that this information can be provided now that required maintenance has been defined for these tools. If the user had made sure all instances of this tool type had been freshly cleaned, they could have set the **Initial Maintenance Period** to 30 days, and they would not have a status assigned to them.

Follow the Updating Tool Instance Maintenance Information process for each instance of the tool type to finish setting up this maintenance type. Clearly, if you have a lot of this tool type you might want to consider providing the **Initial Maintenance Period** value when assigning the maintenance type to the master tool based on the situation.



## Updating Tool Instance Maintenance Information

NOTE: The Tool Instance Maintenance Information can be edited from either the user interface of the tool's home device or the Administration Client. The example below uses the Administration Client.

1. Double-click one of the tool instances to open the tool details menu.

Top Leve	I/Tool Crib East
nfo Issued <mark>!</mark>	Status Maintenance Attachments
Customer ID	
erial Number (Tool)	
Additional Info	
Tag	
rag	
Color ID Tag	
Home Location T	ool Crib East
Home Location T ToolID 2	ool Crib East 🖉 26864 AM11F / Socket Driver Matrix Hav Standard 11 mm
Home Location T ToolID 2 fault Part # / Desc. F/	ool Crib East 🖉 26864 AM11E / Socket Driver, Metric, Hex, Standard, 11 mm
Home Location T ToolID 2. fault Part # / Desc. F/	ool Crib East 🖉 2864 AM11E / Socket Driver, Metric, Hex, Standard, 11 mm
Home Location T ToolID 2. fault Part # / Desc. F/	ool Crib East 🦉 2864 AM11E / Socket Driver, Metric, Hex, Standard, 11 mm
Home Location T ToolID 2 fault Part # / Desc. F/	ool Crib East 🖉 26864 MM11E / Socket Driver, Metric, Hex, Standard, 11 mm
Home Location T ToolID 2 fault Part # / Desc. F/	ool Crib East 🖉 26864 AM11E / Socket Driver, Metric, Hex, Standard, 11 mm

2. Selecting the **Status** tab will show that the tool is in fact in a **Maintenance Overdue** state.





3. Now switch to the **Maintenance** tab. You can see that the system doesn't know when the due date should be. To set the date, double-click the **Cleaning** maintenance.

Editing FAM11E	2
FAM11E Socket Driver, Metric, Hex, Standard, 11 mm Top Level/Tool Crib East	
Info Issued IStatus Attachments	
Cleaning Due Date =	

4. You need to set the date of the last maintenance, and the system will take it from there. You can do this one by Clicking the green **Update Maintenance** button to set the date of last maintenance to today. Alternatively, you can click the **Date Picker** button, which looks like a calendar and select the date of last maintenance, or you can click the date box and enter it manually.

Cle	ea	nin	g		$\overline{3}$
Da Da Due Da	ys te	<b>3</b> 10/6/2	<b>/</b> 024	<b>30</b>	
Date of Last Maintenanc	<b>e</b> 9	/6/202	24	15	

5. Once the date of last maintenance has been set you can see that the **Due Date** has been calculated based on the information you provided for the **Cleaning** maintenance type. Now click the **OK** button that looks like



a green checkmark and then the blue **Save** button.

	$\overline{n}$	Top Level			Change Curre	ent Location	n 🏂	SuperUser			СІ	ick to lo
		Dashboard	Locations	Tools Tool	States Em	ployees	Groups	History	History	2.0 Reports	Settings	
Q Part Number	FAM1 Socket	<b>1E</b> t Driver, Metric	. Hex, Standard,	11 mm								
EEDM604C BLACK CLIP	Info Instances	Maintenance	e Contained	In Quantity	Monitoring	Attachm	nents 0	Optical Too	box			
EEDM604C RED CLIP												
EETA503C	Show Deleted	Items										
FADH12A	Home Lo	ocation 🕑 A	ditional Info	🕑 User Label 2	Serial Nu	umber 📀	Custom	er ID Qty		Work Location	⊙ Kit	
FAM10E	Tool Crib East							1				
FAM11E	291BJ001							1				
FAM12E			I									
AM13E												
FAM14E												
FAM4E												
FAM5E												
FAM6E												
FAM9E												
FAR2505												
FB316B												
FB325A												
FLF80												
F5081												
FS101												
FS121												
Show Deleted Items												

6. The first instance of this tool type no longer has the **Maintenance Overdue** status now. You will need to repeat this for each instance of the tool type to finish setting up this maintenance type.



## Importing Tool Maintenances

In some cases, it might be useful to be able to import maintenance information for tools. One example would be if you are moving tools with previous maintenance information into an L5 Connect tool crib and you don't want to manually input that maintenance data for each of those tool instances. Another possibility is if you sent a group of tools off to have maintenance performed and you don't want to have to update the maintenance data for each tool individually.

### **Importer Assumptions**

The L5 connect system now supports importing maintenance type information for tools. This import feature assumes that the tools already exist in the system, and they have already been setup with a maintenance type.

NOTE: The maintenance importer will import any maintenance type, but it only supports importing one maintenance type at a time. If you have multiple maintenance types, you must import their data separately.

### Import File

Your input file for the importer will need to be an Excel spreadsheet. It must have the **Tool ID** as a column to map the data to a specific tool instance in the system. Additionally, you must have at least one of the **Last Maintenance** or **Due Date** fields with calibration data to be updated. If you don't already have a source for your spreadsheet, you can easily create one by running a **Maintenance** report. If you need a customer-based reference for the tools such as the **Customer ID** field, you can add that to the report as well. For more information on how to run reports see the L5 Connect Reports document. Here is an example of a maintenance which has been exported into an Excel spreadsheet and had the **Last Maintenance** and **Due Date** fields updated in preparation for importing.

Maintenance							
Filtered By: Location = Top Level	, Maintenance Type = C	alibration, Due Date End Date = 6/28/2025					
Run Time: 5/29/2025 2:29 PM : 0	Central Standard Time						
Requested By: SuperUser							
Storage Location Name	Part Number	Description	Tool Customer ID	Tool ID	Maintenance Type	Last Maintenance	Due Date
Tool Crib East	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive	148750	100004	Calibration	5/28/2025 0:00	5/29/2026 0:00
Tool Crib East	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive	457223	102917	Calibration	5/28/2025 0:00	5/29/2026 0:00
Tool Crib East	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive	934211	102960	Calibration	5/28/2025 0:00	5/29/2026 0:00
Tool Crib East	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive	134829	102972	Calibration	5/28/2025 0:00	5/29/2026 0:00
Tool Crib East	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive	742314	103069	Calibration	5/28/2025 0:00	5/29/2026 0:00
Z91BJ001	AW1015DHK	Set, Wrench, L-Shape, Hex (15 pcs. In BHK15 Metal Index) (.028" to 3/8")	213648	225427	Calibration	5/28/2025 0:00	5/29/2026 0:00
Z91BJ001	OEX20B	Wrench, Combination, Standard Length, 5/8", 12-Point	146378	225223	Calibration	5/28/2025 0:00	5/29/2026 0:00



σ×

### Running the Importer

To import your file, you will need to start the Admin application and go to the **Settings** tab.

			Top Lev	el				Chana	e Current Loca	ation	Sup 🙎	erUser					Click to logout
	R J							chung	e current Loci	mon	_						Click to logour
			Dashb	oard	Locat	ions 1	Fools	Tool States	Employee	s G	iroups	Histor	y F	Reports	Settings		
		Device Statu:	s <b>! 12</b>	<b>S</b>	4 🗆 Hide	OK Items	Alerts:			Work	Location	Status	S	1 🗆 Hide O	K Iter		Alerts:
		Name	Alerts Is	sued Is	sued Users	Mngd Out	Alert		Location	Name		Alerts	Issued	Issued Users	Issued Devices	Mngd Out	Alert Location Tool
System Status Filte	ered Total	Tool Box 1	5	0	0	0	Offline		Tool Crib East	Work	Loc2	0	1	1	1	0	
Devices Online : (	$\frac{1}{1}$	Z91BJ001	2	0	0	0	Mainte	nance Overdue	Tool Crib East	Work	Location 1	0	0	0	0	0	
Devices Offline : 1	<b>2</b> 12	ZA8BT001	2	0	0	0	Mainte	nance Overdue	Tool Crib East	Work	Location one	0	0	0	0	0	
Tools Issued : 1	<b>8</b> 18	Tool Crib East	6	15	4	0	Mainte	nance Overdue	Tool Crib East	Work	Location 3	0	0	0	0	0	
Users with Tools Issued : 5	5	Z98AT001	6	0	0	0	Mainte	nance Overdue	Tool Crib East	Work	Location 4	0	0	0	0	0	
Devices with Tools Issued :		Z99LS001	2	1	1	0	Mainte	nance Overdue	Tool Crib East	Work	Location 5	0	0	0	0	0	
Tools Issued with Alerts		294BJ001		4	1	0	Offline		Tool Box 1	Work	Location 6	0	0	0	0	0	
Managed Tools Out :		Z9/A1001		2	2	0	Bad Dr	awer/Door State	Tool Box 1	Work	Location 7	0	0	0	0	0	
Table Managed 10015 Out : 0	1640	Tool Crib West		0	0	0	In Iran	sit	Tool Box 1	Work	Location 6		0	0	0	0	
Tools Managed : 16	40 1640	29303001		0	0	0	Mainte	nance Overdue	Tool Box 1	Work	Location 10	0	0	0	0	0	
		Z93A0001		-	0	0	Mainte	nance Overdue	79181001	Work	Location 14		0	0	0	0	
		25051001		•	•	•		nunce overdue	25105001		Location 14	, i				•	I
		<							<u> </u>								
Top Employees with Issued Tools	Top Work L	ocations with	Issued T	ool	Top Devi	ces with	Issued	Tools	Inventory w	ith Ser	ial Numbe	er					
Plane Maintenance Hangar, Harry 9	False Org			2	Tool Crib Ea	st		15	() Channel			0			() Description	•1	
		_							Storage	Storage Location Name Part Number				umber	Obescrip	uon	
Plane Maintenance Hangar, Preston 4	Item assembly	9000		1	Z94BJ001			4	Tool Box 1			1650	IO KET		Prybar, 16"		
3								2	Tool Box 1			1AM19	41		Sioux 45 Degre	e Angle Air	Drill,
superoser 2	WORK LOCZ				29/A1001			<u> </u>	Tool Box 1			1DA221HP NO WRENCHES			Sioux 1DA221H	IP Die Grin	der
Smith, John J. 2					Z99LS001			1	Tool Box 1			47ACP	-		Pliers, Combina	ation Slip-J	oint, Industrial Finisł
				P					Tool Box 1			47ACP			Pliers, Combina	ation Slip-J	oint, Industrial Finish
Runner, Rhode 1				- 1					Tool Box 1			87CF			Cutters, Diagon	nal, Vinyl G	tips, 7 3/8"
	1			- 1					Tool Box 1			91ACP			Pliers, Adjustal	ole Joint, In	terlocking Channel,
	1								Tool Box 1			91ACP			Pliers, Adjustal	ole Joint, In	terlocking Channel,
	1			- 1					Tool Box 1			96CF			Pliers, Long Ne Pliers, Long Ne	edie Nose,	Vinyl Grips, 8"
	1			- 1					Tool Box 1			97CCP			Pliers, Needle I	Nose, Vinyl	Grips, 8"
	1			- 1					Tool Box 1			97CCP			Pliers, Needle I	Nose, Vinyl	Grips, 8"
	1			- 1					Tool Box 1			A2A			Adaptor, 3/8" I	nternal driv	re x 1/2" External dr

Select the System Configuration list item on the lefthand side. Then click the Maintenance Types button.





Select the **Calibration** maintenance type from the list of maintenance types on the left. Then click the **Import** button.

	Maintenance Types									
۹	⇒₹									
Name ~	Info									
Calibration	User Text Calibration									

In the file dialog window, navigate to the directory where your spreadsheet is located and select your file. Then click the **Open** button.

5 Select: Spreadsheet								
← → ∽ ↑ 📕	Preston - Snap-on      Documents					~ C		
Organize 👻 New folder							E	- 🔳 📀
> 🌰 Preston - Snap-c	Name	Status	Date modified	Туре				
	My Data Sources	٥	2/10/2025 1:48 PM	File folder				
🔙 Desktop 🔹 🖈	My Web Sites	۰	2/10/2025 1:48 PM	File folder				
🚽 Downloads 🖈	Notes	•	2/10/2025 1:48 PM	File folder				
🧧 Documents 🖈	Scanned Documents	۰	2/10/2025 1:48 PM	File folder				
🔀 Pictures 🛷	Bluetooth Folder	۲	2/10/2025 1:48 PM	File folder				
🚱 Music 🛛 🖈	OneNote Notebooks	۲	2/10/2025 1:48 PM	File folder				
🗾 Videos 📌	SQL Server Management Studio	۲	2/10/2025 1:48 PM	File folder				
🔛 Word Versions o	🚞 My Games	٥	2/10/2025 1:49 PM	File folder				
AWS Monthly Bi	Custom Office Templates	٥	2/10/2025 2:19 PM	File folder				
🖿 Log	Visual Studio 2017	٥	2/28/2025 9:44 AM	File folder				
SmartDevice	Visual Studio 2022	•	2/28/2025 4:34 PM	File folder				
	ConnectWiseControl	٥	3/19/2025 4:19 PM	File folder				
👻 💻 This PC	ScreenConnect	٥	4/8/2025 11:26 AM	File folder				
> 🚔 Windows (C:)	L5ConnectSupportedPeripherals.xlsx	•		Microsoft Excel W	18 KB			
> 🍢 Network	MaintenanceImport.xlsx		5/28/2025 3:48 PM		10 KB			
File nam	e: MaintenanceImport.xlsx						Excel files (xlsx) (*	xlsx) ~
							Open 🔽	Cancel
1								

Now you need to map the columns of the spreadsheet that the importer cares about. **Tool ID** should be mapped to **ToolID** in the pulldown menu. Then map **Last Maintenance** to **Date of Last Maintenance** and map **Due Date** to **Due Date**. Once everything is mapped, click the **OK** button to import the data.

NOTE: The devices containing the tools need to be online. Otherwise, the system will import what it can and give you a list of the ones that were offline.



<b>√</b> ←		Select Header Re Identify Column (	ow (Double Drop-Dow	e-Click) n Men	) u)		
Storage Location Name	Part Number	Description	Tool Customer ID	Tool ID	Maintenance Type	Last Maintenance	Due Date
~	~	~	~	ToolID ~	~	Date of Last Maintenance ~	Due Date
Maintenance			1				
Filtered By: Location = Top Level, Maintenance Type = Calibration							
Run Time: 5/29/2025 2:29 PM : Central Standard Time							
Requested By: SuperUser							
Storage Location Name	Part Number	Description	Tool Customer ID	Tool ID	Maintenance Type	Last Maintenance	Due Date
Tool Crib East	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratch	148750	100004	Calibration	5/28/2025 12:00:00 AM	5/29/2026 12:00
Tool Crib East	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratch	457223	102917	Calibration	5/28/2025 12:00:00 AM	5/29/2026 12:00
Tool Crib East	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratch	934211	102960	Calibration	5/28/2025 12:00:00 AM	5/29/2026 12:00
Tool Crib East	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratch	134829	102972	Calibration	5/28/2025 12:00:00 AM	5/29/2026 12:00
Tool Crib East	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratch	742314	103069	Calibration	5/28/2025 12:00:00 AM	5/29/2026 12:00
Z91BJ001	AW1015DHK	Set, Wrench, L-Shape, Hex (15 pcs. In BHK15 Me	213648	225427	Calibration	5/28/2025 12:00:00 AM	5/29/2026 12:00
Z91BJ001	OEX20B	Wrench, Combination, Standard Length, 5/8", 12	146378	225223	Calibration	5/28/2025 12:00:00 AM	5/29/2026 12:00

You will then be prompted to confirm that you want to import the listed number of tools. Click the **Confirm** button to continue.

### **Update Maintenance: 7 Tools Contained In 2 Devices?**



Then click the **OK** button to complete the process.





### **Kit Inspection Process**

This document will explain the process of how kit inspections work. In the L5 Connect system, whenever a kit is returned to a device, the user is prompted to inspect the kit to ensure that all the tools are present and in good condition.

## **Devices That Support Kit Inspection**

Not all devices in the L5 Connect system support kit inspection. Here is a list of the devices that currently do support kit inspection.

- True-Crib
- ATC FlexHub
- ATC Portal

## **Basic Kit Inspection**

This is the basic process for returning a kit. John Smith has a kit issued to him and has logged into the crib to return it.





The kit is selected, and the attendant clicks the **Return** button to return the kit. Alternatively, the bar code of the kit could be scanned to return it.

Snap-on True-Crib, v:9.13.9.0325, Tool Crib East			- 0 ×
TRUE-CRIB	COMPLETE SESSION	SuperUser	
Summary: Smith, John J. Summary: Smith, John J. Summary: Smith, John J. Summary: Smith, John J. Part Number Part Number Part Number Part Number Part Number Metric Socket Kit A simple kit with metric sockets	COMPLETE SESSION Return Mode Metric Socket Kit A simple kit with metric sockets Issued(Smith, John J. ) Home Location: Tool Crib East Issued: Smith, John J. (4/10/2025 3:18:41 PM) ToolID: 227921	Returning 0	<b>2</b> 1
SHOW CONDITIONS AND CHANGES ONLY			

The system will then announce that "Kit inspection required".





When John Smith initiates an end to his employee session, the attendant is prompted to inspect the kit.



Please inspect the contents of the kit: Part Number: Metric Socket Kit, Description: A simple kit with metric sockets, ToolID: 227921

Part Number/Description: FSM101/Socket, Metric, Shallow, 10 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1 ToolID: 227922	
Part Number/Description: FSM111/Socket, Metric, Shallow, 11 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1 ToolID: 227923	
Part Number/Description: FSM121/Socket, Metric, Shallow, 12 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1 ToolID: 227924	
Part Number/Description: FSM131/Socket, Metric, Shallow, 13 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1 ToolID: 227925	
Part Number/Description: FSM141/Socket, Metric, Shallow, 14 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1 ToollD: 227928	
Part Number/Description: FSM151/Socket, Metric, Shallow, 15 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1 ToollD: 227927	<b>⊢</b> ₹
Part Number/Description: FSM161/Socket, Metric, Shallow, 16 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1	- <b>1</b>

At this point, the attendant would then inspect the kit to ensure all the tools were present. Then he would click the green checkmark button to complete the inspection.

Please inspect the contents of the l Part Number: Metric Socket Kit, Description: A simple kit with	kit: metric sockets, ToolID: 227921
Part Number/Description: FSM101/Socket, Metric, Shallow, 10 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1 ToolID: 227922	<b>□</b>
Part Number/Description: FSM111/Socket, Metric, Shallow, 11 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1 ToolID: 227923	
Part Number/Description: FSM121/Socket, Metric, Shallow, 12 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1 ToolID: 227924	
Part Number/Description: FSM131/Socket, Metric, Shallow, 13 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1 ToolID: 227925	<b>⊢</b> ₹
Part Number/Description: FSM141/Socket, Metric, Shallow, 14 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1 ToolID: 227928	r <b>1</b>
Part Number/Description: FSM151/Socket, Metric, Shallow, 15 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1 ToolID: 227927	<b>⊢</b> ₹
Part Number/Description: FSM161/Socket, Metric, Shallow, 16 mm, 6-Point Home Location: Tool Crib East Quantity Available: 1	


## When a Tool is Missing (Kit Incomplete)

What happens when you are inspecting the kit, and a tool is missing? For instance, suppose the first tool in drawer 1 of this kit is not there. The person inspecting the kit would click the **Issue** button for that tool. This will issue that tool to the employee who is checking in the kit. NOTE: If the person returning the kit is not the person to whom the kit was issued, he will still be issued the missing tool.

Please inspect the contents of the kit: Drawer 1 Part Number: Kit Master3, Description: Screwdriver kit, ToolID: 102844	<b>(3)</b>
Part Number/Description: SHD10/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .040° Home Location: Tool Crib East Quantity Available: 1 ToolID: 227914	<b>→→ 1</b>
Part Number/Description: SHD2O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .035" Home Location: Tool Crib East Quantity Available: 1 ToolID: 227905	<b>⊢</b> ₹
Part Number/Description: SHD4O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .040" Home Location: Tool Crib East Quantity Available: 1 ToolID: 227906	<b>⊢</b> ₹
Part Number/Description: SHD60/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .050° Home Location: Tool Crib East Quantity Available: 1 ToolID: 227907	<b>₽</b>
Part Number/Description: SHD80/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .055° Home Location: Tool Crib East Quantity Available: 1 ToolID: 227908	<b>⊢</b> ₹
Part Number/Description: SHDP22IRO/Screwdriver, Phillips ACR, Instinct <sup>™</sup> Hard Handle, #2, Orange Home Location: Tool Crib East Quantity Available: 1	

Since they have not returned this tool with the kit, it will now be issued to them even though the rest of the kit will be returned.

$\checkmark$	Please inspect the contents of the kit: Drawer 1 Part Number: Kit Master3, Description: Screwdriver kit, ToolID: 102844	8
d de	Part Number/Description: SHD1O/Screwdriver, Flat Tip, Instinct™ Hard Handle, Orange, .040° Home Location: Tool Crib East Quantity Available: 0 Issued: Smith, John J. (4/10/2025 1:39:47 PM) ToolID: 227914	Ó
	Part Number/Description: SHD2O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .035° Home Location: Tool Crib East Quantity Available: 1 ToolID: 227905	-
	Part Number/Description: SHD4O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .040° Home Location: Tool Crib East Quantity Available: 1 ToolID: 227906	-
	Part Number/Description: SHD6O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .050° Home Location: Tool Crib East Quantity Available: 1 ToolID: 227907	
	Part Number/Description: SHD80/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .055° Home Location: Tool Crib East Quantity Available: 1 ToolID: 227908	
	Part Number/Description: SHDP22IRO/Screwdriver, Phillips ACR, Instinct <sup>wr</sup> Hard Handle, #2, Orange Home Location: Tool Crib East Quantity Available: 1 ToolID: 227916	-
	Part Number/Description: SHDP31IRO/Screwdriver, Phillips ACR, Instinct <sup>ess</sup> Hard Handle, #1, Orange Home Location: Tool Crib East	



As the inspection is completed, the employee session will end. As you can see from the session summary screen, there was one issued(the missing tool) and one returned(the kit).

Summary: Smith, John J.	R Current Employee Smith. John J.	Return	Attendant SuperUser
Part Number Details SHD10 Screwdriver, Flat Tip, Kit Master3 Screwdriver kit	1 Durables	1 Durables	
	0 Consumables	0 Consumables	
(	Status Cl	nanges 0	
	Maintenance	e Changes 0	
SHOW CONDITIONS AND CHANGES ONLY	SHOW EMPLOYEE SUMMARY		

Also, the dashboard of the crib now shows an alert status on the kit tool of **Kit Incomplete** because it has a tool missing from it.

45 Snap-on True-Crib, v:9.13.9.0325, Tool Crib	East															-	0
TRUE-0	C	R/	;	8										Attend SuperL	lant Jser	Cli	ick to log
				SCAN E	1PL	OYEE BAD	GE TO S	TART								<b>%</b>	
System Status Devices Online : Devices Offline : Tools Issued : Users with Tools Issued : Devices with Tools Issued : Tools Issued with Alerts : Managed Tools Out : Tools Managed :	Filter 1 15 5 1 2 28	red Tota 1 5 15 5 1 2 0 7 288	1 1	Device Status 🚹 💊	1	Hide OK Items Users Mngd Out O	Alerts: Alert In Transit In Transit Kit Incomp Issued: Tool SGD2BR SGD4BR SDM213B	Cool Crib Ea Location Tool Cril Tool Cril Notete Tool Cril Employee Plane Mainte Runner, Rhoo Plane Mainte	st b E b E c E c E	Tool ast DBTBM1 ast SGD2BR ast Kit Mast	Issued Work I Name Work I	Tools Location Status Alerts Issued Loc2 0 1	ssued Users I	ssued Device	A s Mngd Out A 0	lerts: Jert Location	Tool
Top Employees with Issued Tools		Top Work		cations with Issued Tool	Тор	Devices with	Issued To	Plane Mainte		ecent Event	ts						
								47	ſ	Time		Action	Part Number	Employee	Source	Destination	
Plane Maintenance Hangar, Harry	-	Item assemb	iy 90	00 I	1001	Crib East		13		4/11/2025 3:5	2:46 PM	Session completed		SuperUser	Tool Crib East		
Plane Maintenance Hangar, Preston	2	False Org		1	Z948	BJ001		4	I.	4/11/2025 3:5	2:45 PM	Tool Issued	SHD10	SuperUser	Tool Crib East		
	_				-				L	4/11/2025 3:5	2:45 PM	Tool Returned	Kit Master3	SuperUser	Tool Crib East		
SuperUser	2	Work Loc2		1					Í.	4/11/2025 3:5	2:32 PM	Session started		SuperUser	Tool Crib East		
Runner, Rhode	1								į.	4/11/2025 3:5	2:29 PM	Session completed		SuperUser	Tool Crib East		
									1.	4/11/2025 3:5	2:28 PM	Tool Issued	Kit Master3	SuperUser	Tool Crib East		
Smith, John J.	1								1.	4/11/2025 3:5	2:16 PM	Session started		SuperUser	Tool Crib East		
	_								1.	4/11/2025 3:5	2:13 PM	Session completed		SuperUser	Tool Crib East		
									ŀ	4/11/2025 3:5	2:12 PM	Tool Returned	SHD10	SuperUser	Tool Crib East		
									Į.	4/11/2025 3:5	2:05 PM	Session started		SuperUser	Tool Crib East		1
									i.								

Kit statuses will only be set if the kit has been configured to enable them. For more information on how to do this, see the Kit Tools section of the Adding Tools document.



It should also be noted that if during the inspection you notice a tool has some problem such as being broken, you can double click that tool to go to the tool details and set a status on the tool to show that it needs attention.

Editing SHD10 SHD10 Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .040° Tool Crib East			۷
Info Issued Status Attachments Current	Available		
	Calibration Requested	Inspection Requested	Lost
	Not Available	Not Issued	Not Rec
	Not Received	Not Returned	Out for Replace or Repair
	Repair Requested	Replacement Requested	



### Consumables and Returnable Consumables

Kits with consumables and returnable consumables behave a bit differently than other kits. When a kit with consumables is returned, the system will give a voice prompt just as before that kit inspection is required. As the inspection screen is displayed, however, there are some notable differences between the consumable and returnable consumable tools.

Please inspect the contents of the kit: Part Number: ConsumableKit, Description: Kit with consumables and returnable consumables, TooIID: 227932						
Part Number/Description: GA225/Face Shield Home Location: Tool Crib East	Prev Qty	Curr Qty	_	Issued	Returned	
Quantity Available: 10 ToolID: 227933	10	10			0	
Part Number/Description: GLOVE7LB/LRG HD LATX TECH GLVS				Prev Qty	Curr Qty	
Quantity Available: 100				100	100	🔺

First let's look at the consumable tool, the gloves. When the kit was issued there were 100 pairs available. Now that the kit is being returned, the inspector needs to decrement the number of pairs of gloves that are still in the kit. In this case, let's say it was 2 pairs of consumable gloves used while the kit was issued.

Please insp Part Number: ConsumableKit, Descript	eect the contents of the tion: Kit with consumab TooIID: 227932	kit: les and i	retur	nable co	nsumab	oles,	
Part Number/Description: GA225/Face Shield Home Location: Tool Crib East	Prev Qty	Curr Qty		Issued	Returned		
Quantity Available: 10 ToolID: 227933	10	10			0		
Part Number/Description: GLOVE7LB/LRG HD LATX TECH GLVS				Prev Qty	Curr Qty		
Quantity Available: 98				100	98	▼	
Issued: Smith, John J. (4/14/2025 3:03:54 PM) ToolID: 227934				1 Pair			



### NOTE: If the number of pairs of gloves used was large enough, the system would set a Quantity Low status to alert users that the kit needed to be replenished.

Now let's look at the returnable consumable tools. These tools are considered consumable but must be returned before being disposed of. In this case, there are two sets of counters. The first set shows the original quantity, and the quantity left unused when the kit is returned. We will assume 1 was used and decrement that counter by 1. The second set of counters shows the quantity that was used and the quantity that is being returned.



The session summary at the end of the inspection shows that two consumable tools were issued, the gloves and the face shield. It also shows that two tools were returned. These were the durable kit and the consumable face shield.





### Sub-Locations

Some kits will have sub-locations in them such as drawers. These types of kits will have more options for kit inspection. This time we will look at an example of a kit with multiple sub-locations. John Smith starts a session to return a new screwdriver kit.

TRUE-CRIB	O COMPLETE SESSION	Attendant SuperUser
Summary: Smith, John J.	Return Mode	
SHOW CONDITIONS AND CHANGES ONLY	RY	

The kit is selected, and the attendant clicks the **Return** button to return the kit. Alternatively, the bar code of the kit could be scanned to return it.

anapron mercine, sasta assas, non cito cas		
TRUE-CRIB	O COMPLETE SESSION	SuperUser
Summary: Smith John J		
	Return Mode	Returning 0
<b>%</b> 1 @3 <mark>%</mark>	C.	
	Kit Master3	
R Part Number	Screwdriver kit	
Part Number Details		
Kit Master3 Screwdriver kit	Issued(Smith, John J. )	
	Home Location: Tool Crib East	
	ToolID: 102844	
	TOOLD. TOLDET	
SHOW CONDITIONS AND CHANGES ONLY	ARY	



The system will then announce that "Kit inspection required".

TRUE-CRIB	Smith, John J. <i>CLICK TO COMPL</i>	PLETE SESSION
Summary: Smith, John J.		
R Me	e All Users Part Number	Kit Master3 Screwdriver kit
Kit Master3 Screwdriver kit	Iss	ssued(Smith, John J. )
		Home Location: Tool Crib East Issued: Smith, John J. (4/10/2025 3:47:52 PM) ToolID: 102844
SHOW CONDITIONS AND CHANGES ONLY	SHOW EMPLOYEE SUMMARY	

When John Smith initiates an end to his employee session, the attendant is prompted to inspect the kit.



Notice that there are multiple drawers in this kit. In the basic inspection mode, the attendant has several options on how he can verify the contents of the kit.



#### Manual Inspection

The first option is manually inspecting everything and then just clicking the green checkmark to verify that the kit is complete.

<b>~</b>	Please inspect th Part Number: Kit Master3, Descri	e contents of the kit ption: Screwdriver kit, ToolID: 102	2844
			Inspect All Locations
Drawer 1	Inspect	Drawer 2	Inspect



#### Manually Inspecting Each Location

The second option is to click the **Inspect** button on each of the locations to show him the expected contents of each location one at a time and verify each location in that way. Once he has verified all the listed tools are present, he would click the green checkmark button to verify that location.

Please inspect the contents of the kit: Drawer Part Number: Kit Master3, Description: Screwdriver kit, T	r 1 GoollD: 102844
Part Number/Description: SHD10/Screwdriver, Flat Tip, Instinct <sup>w</sup> Hard Handle, Orange, .040° Home Location: Tool Crib East Quantity Available: 1 ToolID: 227914	<b>P</b>
Part Number/Description: SHD2O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, 035" Home Location: Tool Crib East Quantity Available: 1 Toollib: 227905	
Part Number/Description: SHD4O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, 040° Home Location: Tool Crib East Quantity Available: 1 ToollD: 227906	
Part Number/Description: SHD6O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .050° Home Location: Tool Crib East Quantity Available: 1 Toollib: 227907	
Part Number/Description: SHD8O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .055° Home Location: Tool Crib East Quantity Available: 1 Toollib: 227908	
Part Number/Description: SHDP22IRO/Screwdriver, Phillips ACR, Instinct <sup>™</sup> Hard Handle, #2, Orange Home Location: Tool Crib East Quantity Available: 1 ToolID: 227916	
Part Number/Description: SHDP31IRO/Screwdriver, Phillips ACR, Instinct <sup>™</sup> Hard Handle, #1, Orange Home Location: Tool Crib East Quantity Available: 1	

Once he has repeated this process for each of the locations in the kit, he would then click the green checkmark button on the main inspection screen to complete the verification of the kit.

	Please ins Part Number: Kit Master3,	pect the Descrip	e contents of the kit htion: Screwdriver kit, ToolID: 1	02844	<b>3</b>
				Inspect All	Locations
Drawer 1	Ir	nspect	Drawer 2		Inspect



#### Guided Inspection

 $\checkmark$ 

Finally, he could click the **Inspect All Locations** button, and the system would walk him through verifying each of the locations in the kit individually.

Part Number	Please inspect the contents of the kit r: Kit Master3, Description: Screwdriver kit, Tooll	D: 102844
		Inspect All Locations
Drawer 1	Inspect Drawer 2	Inspect

This will initiate a guided inspection of each of the locations in the kit to verify all tools are present.

Please inspect the contents of the kit: Drawer 1 Part Number: Kit Master3, Description: Screwdriver kit, ToolID: 102844

Part Number/Description: SHD1O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .040° Home Location: Tool Crib East Quantity Available: 1 ToolID: 227914	<b>□</b>
Part Number/Description: SHD2O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .035" Home Location: Tool Crib East Quantity Available: 1 ToollD: 227905	
Part Number/Description: SHD4O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .040° Home Location: Tool Crib East Quantity Available: 1 ToolID: 227906	
Part Number/Description: SHD6O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .050° Home Location: Tool Crib East Quantity Available: 1 ToolID: 227907	
Part Number/Description: SHD8O/Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .055" Home Location: Tool Crib East Quantity Available: 1 ToolID: 227908	
Part Number/Description: SHDP22IRO/Screwdriver, Phillips ACR, Instinct <sup>™</sup> Hard Handle, #2, Orange Home Location: Tool Crib East Quantity Available: 1 ToolID: 227916	
Part Number/Description: SHDP31IRO/Screwdriver, Phillips ACR, Instinct <sup>™</sup> Hard Handle, #1, Orange Home Location: Tool Crib East Quantity Available: 1	

 $\bigcirc$ 



After verifying each tool listed in the current location, click the green checkmark button to verify that location's contents.



Repeat this process as the system walks you through each of the locations and once you have completed the verification of all locations the kit inspection will compete automatically, and the employee session will end.



#### Require Kit Location Inspection Feature

The L5 Connect system has a **Require Kit Location Inspection** feature. Enabling this feature will force users returning a kit with multiple sub-locations to use the guided inspection procedure described in the Guided Inspection section.

To configure this feature, open the L5 Connect Admin application and go to the Locations tab.

Snap-on L5 Connect Admin Client, v:9.13.9.0325										- 0 ×
STETER	TIN	Top Level			Change Curr	ent Location	Plane I	Maintenance Han	gar, Preston	Click to logout
		Dashboard	Locations	Tools To	ol States En	nployees Gro	oups His	tory Reports	Settings	
Name	Top Lev Organiz	rel ational Locatic	on		~					
Brake Shop	Info Profiles	Profiles	Options	Subscriptions	Audit Types	Quantity Mo	nitoring	Attachments	Favorites	
Calibration Lab	(Employee)	(Group)		•						
Elight Operations	Nar	Top Lovel								
Helicopter Maintenance Han		ine iop Level								
Helicopter Maintenance H	Customer									
Helicopter Maintenance H	Not	es								
Helicopter Maintenance H	Parent Location	on 🖉								
4 Helicopter Maintenance H										
Tool Box 1	Responsible Employ	ee 🖉 🗙								
Plane Maintenance Hanga										
Plane Maintenance Hanga										
Plane Maintenance Hanga										
Plane Maintenance Hanga										
Tool Crib East										
A Assembly Area A										
Assembly Area A Line 0										
Assembly Area A Line 1										
Assembly Area A Line 2										
Assembly Area B										
Assembly Area B Line 0										
Assembly Area B Line 1										
Show Deleted Items										

Select the **Options** sub-tab and then expand the **Tool Crib** section.

STITIC	5	Til	Top Level			Change	Current Locatio	on an	Plane Mainte	enance Hang	gar, Preston	Click to logo
	_		Dashboard	Location	s Tools	Tool States	Employees	Groups	History	Reports	Settings	
Name · · · · · · · · · · · · · · · · · · ·		Top Lev Organiz	vel ational Locat	ion								
Brake Shop	Info	Profiles	Profiles	Options	Subscriptio	ns Audit T	/pes Quant	ity Monitor	ing Atta	chments	Favorites	1
<ul> <li>High Operations</li> <li>Helicopter Maintenance Han Helicopter Maintenance H Helicopter Maintenance H</li> <li>Helicopter Maintenance H</li> <li>Hole Maintenance Hangar Plane Maintenance Hangar Plane Maintenance Hanga Plane Maintenance Hanga Plane Maintenance Hanga</li> <li>Tool Crib East</li> <li>Manufacturing</li> <li>Assembly Area A Line 1 Assembly Area A Line 1 Assembly Area B Line 0 Assembly Area B Line 0 Assembly Area B Line 0 Assembly Area B Line 0 Assembly Area B Line 1 Assembly Area B Line 1 Assembly Area B Line 1 Assembly Area B Line 1</li> </ul>	Optic Engli Bar c Singl Sun ⊙ O ⊙ R	In options from ons	Lat En pt VW Au Su Ad OBDOX net Employee 5 kit Location b Session Tib Session Tib	nguage able Work O ork Order En dio Alert Lex ppress Work vice Weekly min Session ignature a Inspection meout (Seco	rder Entry try UI Style rel Locations Pr Reboot (Dev Timeout (Mi	ompt ice Local Time nutes)	)					
Show Deleted Items		☐ Logout ☐ Tool Cr ☐ Auto-p	and start a ib No Attend rompt to Tra	new tool crib lant Require Insfer Tool o	o session with d n Tag Scan	i badge scan						

Select the Require Kit Location Inspection checkbox to force users to go through the guided inspection process.



### **Tool Custody Transfer**

Sometimes a user who has tools issued to them may be at the end of their shift, but the job is not complete yet and the tools are still needed to complete the job. Rather than forcing the employee to return the tools so that the employee who will be taking over can then check them back out, the L5 Connect<sup>™</sup> system allows the custody of these tools to be transferred from one employee to another. This custody transfer can be initiated from the tool or from the employee.

#### NOTE: Tool custody transfer requires the Info Edit permission in the Tools group of permissions.

Antina	Top Level						Change C	Current Location	n Sup	SuperUser	
	Dashboard Locations Too	Is Tool States	Employees	Groups H	istory Repo	rts Settin	gs				
4	Profile Permissions Ed	tor									
About Network Setup	Name	Custom System User	No Audit	SuperUser -copy	SuperUserCheater	System User	Maintenance	Administrator	SuperViewer	SuperUser	
System Configuration	<ul> <li>Employees</li> </ul>	(None)	(None) -	(Custom) -	Administrator -	System User	Maintenance	Administrator	SuperViewer	SuperUser	
Dashboard	● Locations	System User	System User	Administrator -	Administrator	System User	Maintenance	Administrator	SuperViewer	SuperUser	
Device Global Settings	€ Groups	System User	System User	Administrator	Administrator -	System User	Maintenance	Administrator	SuperViewer	SuperUser	
Issued Tool Past Due	Devices	(Custorn)	(Custom)	(Custom) -	(Custom)	System User	Maintenance	Administrator	SuperViewer	SuperUser	
Profile Permissions	Status	(Custom)	(Custom)	(Custom)	(Custom)	System Liser	Maintenance	Administrator	SuperViewer	SuperLiser	
Tool Display Formatting	System Configuration	(None)	(None)	SuperUser -	(Custom)	System User	Maintenance	Administrator	SuperViewer	SuperLiser	
Tracking Bags	Tools	Sustem Liner	Sustem Liser	(Custom)	(Custom)	Sustam Liser	Maintenance	Administrator	SuperViewer	Superliser	
User Defined Fields	Bunass Tool Status Issued Lock Out	System Oser	System Ose	(ceston)	(custon)	System User	Wannerance	Administrator	Superviewer	Superuser	
Diagnostics	Home Location Change	10	10	2	2	10	11	2	1	2	
Local Settings	Info Edit	1		×	2	10	10	2		1	
	Info View	×	2	12	20	12	1	2	1	2	
	Override Issued Tool State			10		10	10	2		2	
	Tolerance Edit	10		×	1	(II)	1	×	ED	1	
		(None)	(None)	SuperUser -	SuperUser -	System User	Maintenance	Administrator	SuperViewer	SuperUser	



## Tool Initiated Custody Transfer

Initiating custody transfer from the tool can happen from multiple places in the admin application. Basically, anywhere from which you can access the tool info will work.

For example, on the dashboard you could select the device from which the tool is issued in the **Device Status** widget. This will cause the list of tools issued from that device to be displayed. You could then double click the tool of interest or right click and select **Jump to** and then **Tool Details** to pull up the tool info for that tool.



Alternatively, you could go to the **Tool States** tab and select the **Issued** sub-tab. You could filter the list of issued tools if needed, and then either double click the desired tool or right click and use the context menu to select **Jump to** and then **Tool Details** to pull up the tool info.



45 Snap-on L5 Connect Admin Client, v:9.1	12.1.1001									- 0	×
STITE	71	A	Top Level		с	hange Curre	ent Location	uperUser		Click to	logout
	1		Dashboard	Locations	Tools Tool St	ates Em	ployees Groups	History Rep	orts Se	ttings	
Status Issued Invento	Status Issued Inventory Maintenance In Process										
Filtering											
Intering     Intering       Image: State of the											
Storage Location Name	Part     CTC131	Number Oescription			Dra	wer Tool II	D Issued Time	Issued Quantity	⊙ Units	⊙ Employee	© N
Tool Crib East	CTC131	44.4 and 40.17 Dunt D.			I	100103	7/14/2022 4:01:38 PM	1		Plane Maintenance Hangar, Harry	
Tool Crib East	CTC131	Jump to	<ul> <li>Ioc</li> </ul>	ol Details (CIC131)		102979	10/14/2024 3:47:06 PM	1		Plane Maintenance Hangar, Harry	_
Tool Crib East	CTC131	Forensics	<ul> <li>Too</li> </ul>	ols (CTC131)		102980	10/14/2024 3:47:06 PM	1	<u> </u>	Plane Maintenance Hangar, Harry	
Tool Crib East	CTC131	Deactivate CTC131	Em	ployees (Plane Mainter	ance Hangar, Harry )	102981	10/16/2024 3:14:43 PM	1		Smith, John J.	Work L
×		Deliver CTC131	Loc	cations (Tool Crib East)							2
		Change Home Location CTC131	Too	ol Details (Tool Crib East	)						
	_		Too	ols (ToolCrib)							
			Em	nolovees (Plane Mainter	ance Hangar, Harry )						
				proyees (Finance mainter	unce hungur, hunry /						

Once you get to the tool info page select the **Issued** sub-tab.

CTC131 14.4 and 18 V Dual Bay Charger p Level/Tool Crib East Info Status Attachments
into designed Status Attachments
Customer up pp1
Additional Info
User Label 2
Color ID Tag
Home Location Tool Citie Bast
Default Part # / Desc. CTC131 / 14.4 and 18 V Dual Bay Charger

Then click the **Change** button, that looks like a pencil, to edit the tool issued details.



Editing CTC131	<b>e</b>
CTC131 14.4 and 18 V Dual Bay Charger Top Level/Tool Crib East	
Info 🕜 Issued Status Attachments	<b>\</b>
Plane Maintenance Hangar, Preston 7/14/2022 4:01:38 PM (Qty:1)	a 🖉

Click the **Employee** pull-down and select the employee to whom you wish to transfer custody of the tool. **NOTE: The list of employees to which you can transfer custody is limited to those that have access to the tool's device.** 

	lssued	
Employee	Plane Maintenance Hangar, Preston	~
Date	7/14/2022	15
Time	4 : 01 PM · (UTC-06:00) Central Time (US & Cana	ada) ×
Work Location	Ø	

Once you have the new employee selected, click the green **OK** button.

	Issued	0
стріоуее	Plane Maintenance Hangar, Harry	~
Date	7/14/2022	15
Time	4 : 01 PM · (UTC-06:00) Central Time (US & Can	iada) 🐣
Work Location		



Finally, click the blue **Save** button to save the change and the tool will now be issued to the new employee.





## Employee Initiated Custody Transfer

Suppose the employee has multiple tools issued and it would be inconvenient to find each tool individually and then transfer the custody. You can instead go to the **Employees** tab and find that employee. Then you click the **Custody Transfer: Issued Tools** button.

45 Snap-on L5 Connect Admin Client, v:9.12.1.1001											- a ×
		op Level			Chanae	Current Location	, 🏼 🎜 Si	uperUser			Click to logout
Hall Collect					change	current cocutor					click to logour
		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
Name     v       Assembly Area B Line 2, Kim     1	Plan pcp	e Maintenanco	e Hangar, Pro	eston					+	2	
Helicopter Maintenance Hangar, Ali	Info Profiles	Membership	s Subscri	ptions	Attachments	)					
Helicopter Maintenance Hangar, Ed	Last Name Pla	ne Maintenano	e Hangar			-	- Bade	ne Info —			
Helicopter Maintenance Hangar, Fred	First Name Pre	iston	e mangar				- Dudy				
Helicopter Maintenance Hangar, George	M. Initial						-1	Badge	Ľ		
Helicopter Maintenance Hangar, Kate	Title						Temp	Badge 🗸	×		
Helicopter Maintenance Hangar, Ted	Customer ID por	2					10/1	4/2021 15	8 . 38	AM ~	
Helicopter Maintenance Hangar, Tom	Email	·						.,			
Plane Maintenance Hangar, Alice	Cell Phone 50	18675309	Car	rier Ver	izon ×		Phot	to			
Plane Maintenance Hangar, Gerald	cent none po		cu	Ter Ter	12011						
Plane Maintenance Hangar, Gina	Home Location To	p Level 🖉									
Plane Maintenance Hangar, Harold	Language En	glish					~				
Plane Maintenance Hangar, Harry											
Plane Maintenance Hangar, Jerry											
Plane Maintenance Hangar, Joe	User Name	pcp									
Plane Maintenance Hangar, Preston	Change Password			Clear L	ogin			C			
Plane Maintenance Hangar, Kobin								4	2 ×		
Superliser											
SuperViewer											
Supervisor Assembly Area A. Polly											
Supervisor Assembly Area B, Rachel											
Show Deleted Items											

You will be taken to a **Confirm: Custody Transfer** screen and all the tools currently issued to the user will be preselected to be transferred to a soon to be selected new employee. If there are tools that you don't wish to transfer, you can move them back to the original employee by clicking the red arrow button next to those tools. Once you have the tools you wish to transfer selected, click the **OK** button that looks like a green checkmark.



From: Plane Maintenance Hangar, Preston 🏓	➡ To: R	ecipient		
Part Number Details		Part Number	Details	
		SGD2BR	Screwdriver, Flat, Instinct™ Soft Handle, Red, .035" Plane Maintenance Hangar, Preston 12/22/2021 9:38 AM	•
		SDM213B	Bit, Flat Tip, .038" x .250" Plane Maintenance Hangar, Preston 1/12/2022 9:44 AM	•
	P	DBTBM10	10 mm ThunderBit® Metric High Speed Steel 135° Split Point Drill Bit Plane Maintenance Hangar, Preston 10/20/2021 4:11 PM	•
	1	DBTBM10	10 mm ThunderBit® Metric High Speed Steel 135° Split Point Drill Bit Plane Maintenance Hangar, Preston 12/7/2021 1:04 PM	•
		CTC131	14.4 and 18 V Dual Bay Charger Plane Maintenance Hangar, Preston 7/14/2022 4:01 PM	•
		CTC131	14.4 and 18 V Dual Bay Charger Plane Maintenance Hangar, Preston 7/14/2022 4:01 PM	•
	P	DBTBM13	13 mm ThunderBit® Metric High Speed Steel 135° Split Point Drill Bit Plane Maintenance Hangar, Preston 7/14/2022 3:30 PM	•
	1	DBTBM13	13 mm ThunderBit® Metric High Speed Steel 135° Split Point Drill Bit Plane Maintenance Hangar, Preston 7/18/2022 9:00 AM	•
		Kit with drawers	kit with sub-locations for testing inspections Plane Maintenance Hangar, Preston 8/24/2022 10:08 AM	•
	1	AT380	Impact Wrench, Air, Heavy Duty, 3/8" Drive (35-150 ft. lb.) Plane Maintenance Hangar, Preston 1/12/2024 1:59 PM	•
		)		

You will then be prompted to select the employee to whom the tools will be transferred. Select the employee to which you wish to transfer the tools. **NOTE: The list of employees to which you can transfer custody is limited to those that have access to ALL the devices for the selected list of tools.** You can use the search bar to find the desired employee when you have a lot of employees from which to choose.

۹.	Select:	Recipient	8
Plane Maintenance Hangar, Harry	Smith, John J.	SuperUser	

You should then see that you have successfully transferred custody of the tools to the new employee. Press the **OK** button.



	Carta da Tamatan
	Custody Transfer
Complete: Success (Plane Maintenance Hangar, Preston * Plane Maintenance Hangar, H Custody Transfer (10/10) Start: Plane Maintenance Hangar, Preston * Plane Maintenance Hangar, Harry @ Top L Select: Recipient: Plane Maintenance Hangar, Harry Confirm: Custody Transfer (Plane Maintenance Hangar, Preston * Recipient @ Top Leve	larry @ Top Level) evel I): Tools = 10
Con	nplete: Success



### True-Crib Custody Transfer

Tool custody transfer can also be accomplished from a True-Crib device. Log into the crib as an attendant but without a session. On the **Device Status** widget of the dashboard, click the **Issued** number to display the issued tools.

5 Snap-on True-Crib, v.9.12.1.1001, Tool Crib	C.F	?/F	3						5	Attendant SuperUser	i.	- c	×
			SCAN EI	MPLOYEE B	ADGE T	O START							
System Status Devices Online : Devices Offline : Tools Issued : Users with Tools Issued : Devices with Tools Issued : Tools Issued with Alerts : Managed Tools Out : Tools Managed :	Filtered 1 14 4 1 3 0 256	1 <b>Total</b> 1 0 14 4 1 3 0 257	ce Status 11 2 1 1 e Alers Issued Issued Crib East 77 14 4	Hide OK Items Users Mngd Out	Alerts: Alert Maintenar Maintenar Maintenar Maintenar Maintenar Issued: Tool SOM2138 CTC131 DBTBM10	Tool Crib East Locatio ace Overdue Tool Cr ace Overdue Tool Cr ace Overdue Tool Cr ace Overdue Tool Cr ace Overdue Tool Cr Employee Plane Maintenance Plane Maintenance Plane Maintenance	A Tool ib East QD2R1 ib East QD3R2 ib East QD3R2 ib East QD2R1 ib East QD2R1 Hangar, Harry Hangar, Harry Hangar, Harry	Issued To Work Loc Name Work Loc	pols cation Status Alerts issued issued lines 2 0 1 1	Issued Devices Mr	Ald ngd Out Al 0 N	erts: ert alaintenance Ove	I Loc Indue   Iter
Top Employees with Issued Tool Plane Maintenance Mangar, Harry Smith, John J. Plane Maintenance Hangar, Preston Ronner, Rhode	s Toj 10 Iter 2 Fals 1 Wo	p Work Le m assembly 9 se Org vrk Loc2	continue with Issued Tool 000 2 1 1 1	Top Devices Tool Crib East Z54BJ001	with Issu	ed Tools	Recent Ever Time 10/16/2024 3 10/16/2024 3 10/16/2024 3 10/16/2024 3 10/16/2024 3 10/16/2024 3 10/16/2024 3 10/16/2024 3 10/16/2024 3 10/16/2024 3	A 3:14:43 PM It 3:14:43 PM It 3:14:43 PM It 3:14:43 PM It 3:14:35 PM It 3:14:35 PM It 3:14:35 PM It 3:14:12 PM S 3:14:12 PM S 3:14:10 PM T 3:13:13 PM S	ution ssued tool issued time changed ssued tool custody sesigned ssued tool custody removed saved tool custody removed ession completed ool Returned ool Returned ession started	Part Number CTC131 CTC131 CTC131 QD2R100 QD2R100 QD2R100 CTECHL1R240A Kit Master	Employee SuperUser SuperUser SuperUser SuperUser SuperUser SuperUser SuperUser	Source Tool Crib East Tool Crib East	Destinat Work Lo Work Lo Work Lo Item ass Item ass Work Lo Item ass Item ass Item ass

Right click the tool of interest from the list of issued tools. Then click the **Jump to** menu option and finally click the **Tool Details (Part Number)** menu option. Once you have reached the tool details screen the process is the same as the **Tool Initiated Custody Transfer** section of the document.



#### Tool Swap Process

The goal of this article is to document the process of swapping tools in the L5 Connect system. An example of why you might want to do this would be if a tool in an ATC FlexHub has been set with a **Maintenance Overdue** status and the user would like to take a freshly calibrated tool of the same type from a True-Crib and swap it with the tool that needs calibration.



# Configuration of L5 Connect system to Allow Tool Swap

- 1. Using the admin client, login and navigate to the **Locations** Tab.
- 2. Select the device in which you wish to allow tool swap. Then click on **Options**. **NOTE: Not all devices** support configuration of "Auto-Prompt to Transfer on Tag Scan". As of this document's writing, only tool cribs, and FlexHubs support Auto-Prompt tool swap. This doesn't mean that tools can't be transferred to other devices, however.
- 3. Look to see if the Options for this device are inherited from another location. If the options are inherited, you will either need to go to that location to change the options or uncheck the checkbox to inherit options to set them for this location.
- 4. Check the Auto-prompt to Transfer Tool on Tag Scan checkbox.
- 5. Repeat this process for any other device types/instances you wish to allow to swap tools including any cribs from which you will be providing the replacement tools.



### Tool Swap Process for Device Types

This section will walk through the process of swapping a tool at each of the device types with a spare tool from the crib. The beginning where the spare tool is removed from the crib and taken to the device in need and the ending part where the tool removed from the device is returned to the crib would be the same for any of the devices. These parts will be described once and the middle portion of doing the swap on the device will be explained for each type of device.

#### Getting a Replacement Tool from the Crib

- 1. A supervisor checks the admin dashboard and sees that the QD2R100 torque wrench in one of the devices has a maintenance overdue status. The user goes to a tool crib and logs in as an attendant and then starts a session.
- 2. The user finds another QD2R100 wrench that is in calibration, issues the tool, and ends the session.



#### Swapping Replacement Tool with a Tool at the Device

There is a separate section on how to swap the tool on each device type.

#### FlexHub Tool Swap

- 1. The user takes that tool to the device with tool that has the maintenance overdue status.
- 2. The user logs into the FlexHub and scans the tag on the replacement tool.



3. The user clicks the Assign tool to a compartment on this device button.

Employee	Select Work Flow								
Return	Return other user tools	Issue							
The tool you scanned belongs to another device.									
2	QD2R100 Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb Tool Crib Dos	2, 3/8" drive							
	Options								
	Assign tool to a compartment on this device								
Pick up tools	Deliver tools	Reload Bags							
Scan tag/code to auto-launch workflow									

4. Next the user will be prompted to select whether to select the compartment by choosing the tool they want to swap or the compartment. In this case the user will click the **Pick a tool to swap** button.

- Employee	Select Work Flo	W								
Return	Return othe	r user tools	Issue							
There are 0 empty inventory compartments available.										
1	QD2R100 Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive Tool Crib Dos									
How would yo	u like to select the	new compartmen	t for this item?							
Pick a tool to swap			Pick by compartment							
Pick up tools	Delive	tools Reload Bags								
Scan tag/code to auto-launch workflow										



5. The user selects the wrench with the **maintenance overdue** status, then clicks the **Green Check** button.

V TSe	ect item for compartment swap
Part Number	Details
Page 100 Pag	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive Maint Overdue
A2A Door 1	Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16"
CTECH4R600A Door 3	600 ft. lb. torque wrench
PT1800AL Door 2	1° Heavy Duty Impact Wrench Maint Pending
WIND100 Door 4	Shop Fan

6. A prompt is displayed to confirm that the selected item will no longer be assigned to the compartment and will be issued to the user. The user clicks the **Confirm** button.

	Select Work Flow									
Selected item will no longer be assigned to compartment. Selected item will be issued to you.										
1	QD2R100 Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive Door 5									
	Replace existing item?									
Confirm		Select new value								
Pick up tools	Deliver tools	Reload Bags								
Scan tag/code to auto-launch workflow										



7. The user is then prompted to remove the tool and close the door. The user takes the tool and closes the door.



8. Now the user is prompted to load the new tool into the compartment and close the door. The user does so.





9. The user is then presented with the summary screen that shows a change has been made to the inventory, the old tool has been issued, and the new tool has been returned to the compartment.



10. At this point, the tool the user had issued from the crib is now a part of the FlexHub inventory. It is assigned to the compartment that had been the home of the tool with the maintenance overdue status. Meanwhile the maintenance overdue tool is still part of the FlexHub inventory but does not have a compartment to which it is assigned as can be seen by the main screen of the FlexHub. Once the **Returning Out of Calibration Tool to Crib** part of the process occurs, it will automatically disappear from the FlexHub main screen.





#### Optical Toolbox Tool Swap

### NOTE: for this device we are using a different model torque wrench due to the availability of in the toolbox inventory.

1. First the user double clicks on the just issued tool using the dashboard of the crib as shown. Alternatively, the tool could be found in the inventory or by right clicking the tool issued event in the recent events and jump to the tool details.

TRUE-(	C	<b>R</b> /	6	3							Attendant SuperUser		- 🗆 💈
				SCAN EM	IPLOYEE BAD	GE TO STAI	R <i>T</i>			(		27	<b>)</b>
System Status Devices Online :	Filter 1	<u>red</u> <u>Tot</u> 1	al	Device Status 1	Hide OK Items ssued Users Mngd Out 2 0	Alerts: Tool t Alert Maintenance O	Crib De L	ocation Tc ool Crib Dos Q	Issued Work I Name A	Tools cocation Status	evices Mngd Out	Alerts:	on Tool
Devices Offline : Tools Issued : Users with Tools Issued :	0 112 2	0 2 112 2	2										
Devices with Tools Issued :	1	1				Issued:							
Tools Issued with Alerts :	0	0				Tool	Employe						
Managed Tools Out :	0	0				TestTool9892	Phillips,	Preston C.					
Tools Managed :	117	7 11	8			TestTool9891	Phillips,	Preston C.					
····· <b>j</b>						TestTool9890	Phillips,	Preston C.					
						QD3R250	SuperUs	er 🗸					
				<	-			>					
op Employees with Issued Too	ls 🛛	Top Worl	k Lo	cations with Issued Tool	Top Devices wit	th Issued Tools		Recent Even	ts				
hilling Proston C	111				Teal Crib Dec		112	Time		Action		Part Number	Employee
							.12	8/14/2024 2:2	8:20 PM	Session completed			SuperUser
uperUser	1							8/14/2024 2:2	8:17 PM	Tool Issued		QD3R250	SuperUser
								8/14/2024 2:2	7:20 PM	Session started			SuperUser
								8/14/2024 2:1	9:01 PM	Status Cleared		QD3R250	
								8/14/2024 2:1	9:01 PM	Tool maintenance date last maint	enance changed	QD3R250	Phillips, Preston C
								8/14/2024 2:1	9:01 PM	Tool maintenance date due chang	jed	QD3R250	Phillips, Preston C
								8/14/2024 2:1	7:56 PM	Status Set		QD3R250	
								8/14/2024 2:1	7:55 PM	Tool home location changed		QD3R250	Phillips, Preston C
								8/14/2024 2:1	7:55 PM	Tool master tool changed		QD3R250	Phillips, Preston C
								8/14/2024 2:1	7:55 PM	Tool quantity changed		QD3R250	Phillips, Preston C
								8/14/2024 2:1	7:55 PM	Tool Added		QD3R250	Phillips, Preston C
								8/14/2024 10	43:59 AM	Tool Returned		QD2R100	SuperUser

2. Next the user clicks on the **Pencil** button to edit the home location of the tool.

ODJR250 Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 50-250 ft. lb., 1/2" drive Customer ID ierial Number (Tool) Additional Into User Label 2 Tag OXO Color ID Tag OXO Fool D227956 efault Part # / Desc. QDJR250 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 50-250 ft. lb., 1/2" drive	Editing QD3R	250					(
Info isued Status Maintenance Attachments Customer ID Additional Info User Label 2 Tag OUSE Label 2 Tag Color ID Tag Color ID Tag Color JD Tag Color	QD3R25 Torque V Tool Crib	<b>0</b> Irench, Adj. Click-type, U.S., Fix+ <i>Dos</i>	ed-Ratchet, 50-250	0 ft. lb., 1/2" drive 🥖			
Customer ID Additional Info Additional Info User Label 2 Tag Color ID Tag Color ID Tag ToolID 227956 efault Part # / Desc. QD3R250 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 50-250 ft. lb., 1/2" drive	Info 🥜 Issued	Status Maintenance	Attachments	]			
Additional Info User Label 2 Tag Color ID Tag ToolID 227956 efault Part # / Desc. QD3R250 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 50-250 ft. lb., 1/2" drive	Customer ID						
Additional Info User Label 2 Tag Color ID Tag Home Location Tool Crib Dos ToolID 227956 efault Part # / Desc. QD3R250 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 50-250 ft. lb., 1/2" drive	Serial Number (Tool)						
Tag Color ID Tag Home Location Tool Crib Dos ToolID 227956 efault Part # / Desc. QD3R250 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 50-250 ft. lb., 1/2" drive	Additional Info						
Color ID Tag Home Location Tool Crib Dos ToolID 227956 efault Part # / Desc. QD3R250 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 50-250 ft. lb., 1/2" drive	User Laber 2						
Home Location Tool Crib Dos	Color ID Tag						
ToolID 227956 efault Part # / Desc. QD3R250 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 50-250 ft. lb., 1/2" drive	Home Location To	ool Crib Dos 🖉 📥					
efault Part # / Desc. QD3R250 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 50-250 ft. lb., 1/2" drive	ToolID 22	.7956					
	Default Part # / Desc. Q	03R250 / Torque Wrench, Adj. 0	Elick-type, U.S., Fix	ed-Ratchet, 50-250 ft. lb.	1/2" drive		



3. The user selects the location of the device to which the tool will be transferred and clicks the **Green Checkmark** button.



4. The user clicks the **OK** button to finish the transfer to the toolbox.

	Tool: Transfer - Tool Crib Dos => Z91BJ001
Finished Requesting: Top Level => Z91BJ001 Releasing: Tool Crib Dos => Top Level Start	
	Finished: Tool Crib Dos => Z91BJ001

5. The user logs out of the crib and takes the replacement tool to the toolbox.



6. The user logs into the toolbox.



- 7. The user opens the drawer and removes the tool in need of calibration from its pocket and then closes the drawer, issuing it to himself.
- 8. The user double taps the tool in need of calibration to open its tool info menu.

		QD3R250 Torque Wrench Z91BJ001/Dwr	n, Adj. Click-type, U.S., 8	Fixed-Ratchet, 50-250	ft. lb., 1/2" (
Current	Main 8/14/	tenance Overdue 2024 2:19:45 PM ()			
Info		Issued	! Status	Maintenance	0



9. The user then clicks the **Gear** button.



10. The user then clicks the **Tool Replacement** button.

	QD3R250 Torque Wrench Z91BJ001/Dwr	, Adj. Click-type, U.S., 8	Fixed-Ratchet, 50-250	ft. lb., 1/2"
	Tolerance	0 (De	vice Default)	
	Training			
	Tool Replacement			
	Signature			
Info	Issued	! Status	Maintenance	0



11. The user selects the instance of the issued replacement tool.



12. The user clicks the **OK** button.

QD3R250 Torque Wrench, Adj. Z91BJ001	Click-type, U.S., Fixed-Ratch	net, 50-250 ft. lb., 1/2" drive	
Customer ID			
Serial Number			
Additional Info			
User Label 2	Iool Replacer	nent: Success	
Tag			
Color ID Tag	0	к	Q
Home Location Z91	вло		
ToolID 225	436		
Default Part # / Desc. QD3	3R250 / Torque Wrench, Adj	. Click-type, U.S., Fixed-Rato	het, 50-250 ft. lb., 1/2" driv
Info	ssued /	! Status	Maintenance



13. The user then opens the drawer where the tool is located and places the new replacement tool into the pocket vacated by the tool requiring maintenance.



14. Now the user takes the tool needing maintenance to the crib and completes the **Returning Out of Calibration Tool to Crib** part of the process.

#### **RFID Locker Tool Swap**

1. First the user double clicks on the tool that was just issued on the dashboard of the crib.

TRUE-CRIB									Superl	<mark>dant</mark> User		Click
SCAN EMPLOYEE BADGE TO START								<u>&gt;</u>				
			Device Status         I         Have OK items           Name         Alerts         Issued         Issue	Alerts: Tool Crib Dos X			Issued Tools Work Location Statu Name Alerts Issued Issue	ed Users Issue	d Devices Mngd Out	Alerts: Alert Location	Tool	
System Status	<u>Filtere</u>	<u>ed Total</u>										
Devices Online :	1	1										
Devices Offline :	0	0										
Te ala laguad a	112	112										
Tools issued :	112	112										
Users with Tools Issued :	2	2										
Devices with Tools Issued :	1	1		Issued:								
Tools Issued with Alerts :	0	0		TestTool9897 Phillips, Preston C.								
Managed Tools Out :	0	0		TestTool9896 Phillips, Preston C. TestTool9895 Phillips, Preston C.								
Managed 100is Out .		110		TestTool9094 Phillips, Preston C.								
lools Managed :	115	116		TestTool9093 Phillips, Preston C. TestTool9093 Bhillips, Breston C.								
				TestTool9091 Phillips, Preston C.								
				TestTool9890 Phillips, Preston C.								
				Q028100 SuperUser			<u> </u>					
Top Employees with Issued Tools	Te	op Work Locations	with Issued Tools	Top Devices with Issued Tools		Recent Events						
Phillips, Preston C.	111			Tool Crib Des	112	Time 8/15/2024 2:53:21 PM	Action Session completed	Part Numbe	r Employee SuperUser	Tool Crib Dos	Destination	
l SuperUser	1					8/15/2024 2:53:20 PM	Tool Issued	QD2R100	SuperUser	Tool Crib Dos		
						8/15/2024 2:53:20 PM	Tool Issue Verified	Q02R100	SuperUser	Tool Crib Dos		
						8/15/2024 2:18:06 PM	Session completed	-	SuperUser	Tool Crib Dos		
						8/15/2024 2:12:47 PM	Tag added	QD2R100	Phillips, Preston C.	Tool Crib Dos		
						8/15/2024 2:12:35 PM	Tag added	Q02R100	Phillips, Preston C.	Teol Crib Des		
						8/15/2024 2:09:34 PM	Session started	QUARTO	SuperUser	Tool Crib Dos		
						8/15/2024 2:08:30 PM	<b>Tool home location changed</b>	Q02R100	Phillips, Preston C.	Teol Crib Des	Top Level	
						8/15/2024 2:00:30 PM	Issued tool custody assigned	Q02R100	Phillips, Preston C.	Tool Crib Dos		
						8/15/2024 2:08:30 PM 8/15/2024 2:08:30 PM	Issued tool custody removed Session consulated	QD2H100	Philips, Preston C. SuperUser	Tool Crib Das		
						8/15/2024 2:01:59 PM	Tool Issued Bad Status	QD2R100	SuperUser	Teol Crib Des		
						8/15/2024 2:01:59 PM	Tool Issued	QD2R100	SuperUser	Tool Crib Des		
						8/15/2024 2:01:59 PM	Tool have Verified	QD2R100	SuperUser	Teel Crib Des		
						W IN COLOR & ZUTING PM	aesson started		Nevroti	non che bes		
						l						

σ×



2. Next the user clicks on the **Pencil** button to edit the home location of the tool.

Editing QD2R100						
QD2R100 Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive Tool Crib Dos						
Info 🥜 Issued Status Maintenance Attachments						
Customer ID						
Serial Number (Tool)						
Additional Info						
User Label 2						
Color ID Tag						
Home Location Tool Crib Dos 🖉						
ToolID 227952						
Default Part # / Desc. QD2R100 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive						

3. The user selects the location of the locker to which the tool will be transferred and clicks the **Green Checkmark** button.

Select home location	
✓ Top Level	
4 Maintenance	
Brake Shop	
Calibration Lab	
Engine Shop	
Finht Onerations	
High operations     Hannar Hannar	
- Terrodynes Heiningen Order Bander Band	
Helicopter Maintenance Hangar bay of	
Helicopter Namiteriance Hangar Bay 1	
neicopter Maintenance hangar bay 2	
* Helicopter Maintenance Hangar Bay 3	
lool Box 1	
<ul> <li>Plane Maintenance Hangar</li> </ul>	
Plane Maintenance Hangar Bay 0	
Plane Maintenance Hangar Bay 1	
Plane Maintenance Hangar Bay 2	
Plane Maintenance Hangar Bay 3	
<ul> <li>Manufacturing</li> </ul>	
<ul> <li>Assembly Area A</li> </ul>	
Assembly Area A Line 0	
Assembly Area A Line 1	
Assembly Area A Line 2	
* Assembly Area B	
Assembly Area B Line 0	
Assembly Area 8 Line 1	
Assembly Area B Line 2	
Final Assembly Area	
Test Klosk	
1 Tool Crib	
Teel Crib Dos	
2918001	
79341001	
792/9001	
7935001	
79747001	
25/A(0)	
23941001	
2.95.3001	
224001001	
	_
	<b>A</b>
	V



4. The user clicks the **OK** button to finish the transfer to the locker.



5. The user logs out of the crib and takes the replacement tool to the locker. The locker shows both the tool that needs maintenance and the issued tool whose home location was just changed to the locker.

F	<u>Te</u>	Jens"
1/	2 🥜 1	@1
	Part Number	Details
1	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive
I	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive SuperUser 8/15/2024 2:53 PM


6. The user logs into the locker and opens the door.



7. The user removes the tool that required maintenance and replaces it with the replacement tool.





8. Then the user closes the door.

Sie	SuperUser Work Locat	tion 3 Close door to logout
2 Me	@ 1	
Part Number QD2R100	Scanning	00 ft. lb., 3/8" drive

9. Notice that the tool requiring maintenance is now issued to the user but still a part of the locker.

1/j	2 🥜 1	@1
	Part Number	Details
!	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive SuperUser 8/15/2024 3:45 PM



#### Tool Crib Tool Swap

- 1. The user takes the replacement tool to the crib with the tool needing maintenance and scans the tool.
- 2. The user clicks the **Transfer tool to this device** button.
- 3. The user clicks the **Return tools to crib** button and returns the tool to the crib.
- 4. The user then issues the tool needing calibration.

#### Portal Tool Swap

1. First the user double clicks on the tool that was just issued on the dashboard of the crib.

15 Snap-on True-Crits, vr9.11.2.0802, Tool Critis Dos				-								- 0
TRUE-CRIB	8								Superl	<mark>dant</mark> User		Click t
				SCAN EMP	LOYEE BADGE TO START							<u>i</u>
			Device Status 1 Hide OK itens Name Alefts Issued Issued Users Mingd Out Tool Crib Dos 0 112 2 0	Alerts: Tool Crib (	Dos 🗴		Issued Tools Work Location Statu Name Alets Issued Issue	nd Users Issue	Devices Mingd Out	Alerts: Net Location	Tool	
System Status Devices Online :	<u>Filtered</u> : 1	<u>Total</u> 1										
Devices Offline :	: 0	0										
Tools Issued :	: 112	112										
Users with Tools Issued :	2	2										
Devices with Tools Issued	1	1		Issued:								
Tools Issued with Alerts		0		TextTool\$897 Phillip	ee s, Preston C.							
Monored Tools Out		0		TestTool9896 Philip	s, Preston C.							
Managed Tools Out		110		TextTool9034 Philip	s, Preston C.							
Tools Managed	: 115	116		TestTool9893 Philip TestTool9892 Philip	s, Preston C.							
				TestTool9091 Philip	s, Preston C.							
				CO2R100 Super	S, Preston C.							
Top Employees with Issued Tools	Top W	Vork Locations	with Issued Tools	Top Devices with h	sued Tools	Recent Events	1					
Phillips, Preston C.	111			Teel Crib Des	112	Time	Action	Part Number	Employee	Source	Destination	
SuperUser	1					8/15/2024 2:53:20 PM	Tool issued	Q02R100	SuperUser	Tool Crib Dos		
						8/15/2024 2:53:20 PM	Tool Issue Verified	Q02R100	SuperUser	Tool Crib Dos		
						8/15/2024 2:18:06 PM	Session completed		SuperUser	Tool Crib Des		
						8/15/2024 2:12:47 PM	Tag added	QD2R100	Phillips, Preston C.	Teel Crib Des		
						8/15/2024 2:12:35 PM	Tag added	QD2R100	Phillips, Preston C.	Teel Crib Des		
						8/15/2024 2:09:34 PM	Session started		SuperUser	Tool Crib Dos	1	
						8/15/2024 2:08:30 PM	Tool home location changed	QD2R100	Phillips, Preston C.	Teel Crib Des	Top Level	
						8/15/2024 2:08:30 PM 8/15/2024 2:08:30 PM	Issued tool custody assigned Issued tool custody removed	QD2R100 QD2R100	Phillips, Preston C. Phillips, Preston C.	Teel Crib Des		
						8/15/2024 2:02:04 PM	Session completed		SuperUser	Teel Crib Des	1	
						8/15/2024 2:01:59 PM	Tool Issued Bad Status	QD2R100	SuperUser	Tool Crib Dos		
						8/15/2024 2:01:59 PM 8/15/2024 2:01:59 PM	Tool Issued	Q028100	SuperUser	Teel Crib Des		
						8/15/2024 2:01:39 PM	Session started		SuperUser	Tool Crib Dos		
	, l			l		λ.						



2. Next the user clicks on the **Pencil** button to edit the home location of the tool.

Editing QD2R100
QD2R100 Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive Tool Crib Dos
Info 🧷 Issued Status Maintenance Attachments
Customer ID
Serial Number (Tool)
Additional Info
User Label 2
Color ID Tag 🖉 🗙
Home Location Tool Crib Dos 🖉
ToolID 227952
Default Part # / Desc. QD2R100 / Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive

3. The user selects the location of the portal to which the tool will be transferred and clicks the **Green Checkmark** button.

Select home location	
4 Top Level	
Maintenance	
Manufacturing	
Test Kiosk	
▶ Tool Crib	
Tool Crib Dos	
Z91BJ001	
Z93AU001	
Z93CR001	
Z93GS001	
Z97AT001	
Z98AT001	
Z98BT001	
Z99LS001	
ZA8BT001	
	<b>V</b>



4. The user clicks the **OK** button to finish the transfer to the portal.

	Tool: Transfer - Tool Crib Dos => Z98BT001
Finished Requesting: Top Level => Z98BT001 Releasing: Tool Crib Dos => Top Level Start	
	Finished: Tool Crib Dos => Z98BT001



5. The user logs out of the crib and takes the replacement tool to the portal. The portal shows both the tool that needs maintenance and the issued tool whose home location was just changed to the portal.

J		Ð	Z Port	BT001 al	Ó
1/	1 🥜 1				
	Part Number	Details			
!	QD2R100	Torque Wre drive Maint Overdu	nch, Adj. Click-type, l	J.S., Fixed-Ratchet,	20-100 ft. lb., 3/8"
I	QD2R100	Torque Wre drive SuperUse	nch, Adj. Click-type, U r <i>8/16/2024 2:30 PM</i>	J.S., Fixed-Ratchet,	, 20-100 ft. lb., 3/8"
Top Emp	loyees with Issu	ued Tools	Recent Events		
- T		1	Time	Action	Part Nun
SuperUser		'	8/16/2024 2:39:28 PM	Tool home location cl	hanged QD2R10
			8/16/2024 2:39:28 PM	Unauthorized User	
			8/16/2024 2:30:20 PM	Security Camera Imag	ge in the second s
			8/16/2024 2:30:12 PM	Unauthorized User	▼
			8/16/2024 2:29:50 PM	Security Camera Imac	ae >



6. The user enters the portal with the replacement tool and logs in. The portal will scan for tools and detect the replacement tool.

SuperUser		Work Location Work Loc2		Ó					
<sup>®</sup> Me ✓					lsers				
Tools leaving with	h me				Ħ				
Part Number Deta	alls	*No Item	S						
Tools returning to	stock				TT .				
Part Numbe	r Details								
QD2R100	Torque 3/8" dri	rque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3" drive							
← Check out		Rescan		Restock –	•				



7. The user clicks the **Restock** button, ends the session, and puts the replacement tool in the portal tool storage area.



8. The user then retrieves the tool requiring maintenance, returns to the portal, and starts a new session which initiates a scan.



9. Once the tool is shown in the **Tools leaving with me** window, the user clicks the **Check out** button and leaves the portal with the tool requiring maintenance.

SuperUser	Work Location Work Loc2								
<sup>≌Me</sup> 	?1	All Users							
Tools leaving with	me	Ħ							
Part Number	Details								
!	Image: Participation of the system       Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive         System       SuperUser 8/16/2024 3:45 PM         Maint Overdue Verify       Verify								
Tools returning to Part Number Detai	Tools returning to stock								
	*No Items								
← Check out	Rescan	Restock ->							

10. Notice that the tool requiring maintenance is now issued to the user but still a part of the portal inventory.



#### Returning Out of Calibration Tool to Crib

- 1. The user will now return to the tool crib and login as an attendant and then scan the tool with the maintenance overdue status.
- 2. The user then clicks the **Transfer tool to this device** button.

TRUE-CRIB	Superhar
The tool you scanned belongs to another device.	
COTTON Trange Warrich, Adj. Click-type, U.S., Field Ratchet, 20-100 ft. lb, 3/8" drive 23/3/2011	<b>•</b>
Options	
Transfer tool to this device	

3. The user is then prompted to choose whether the tool should be returned to the crib or left issued. The user clicks the **Return tools to crib.** button.

45 Snap-on True-Crib, v:9.10.4.0513, Tool Crib		🔂 💷   🖓 🔲 🖓   🚳 🛞   ⊘ <		– o ×
TRUE-C	RIB		Attendant SuperUser	
		SCAN EMPLOYEE BADGE TO ST	ART	
System Status <u>Eilte</u> Devices Online : 1 Devices Offline : 0 Tools Issued : 11 Users with Tools Issued : 6 Devices with Tools Issued : 1 Tools Issued with Alerts : 3 Managed Tools Out : 1 Tools Managed : 25	Pred         Total           1         1           0         5           5         6           1         3           1         1           3         1           36         257	Hide OK Rems Alerts:     Alert s:     Maintenance Overdue Tool Gri     Maintenance Overdue Too	Issued Tools           Vork Location Status         2           Name         Alerts Issued Issued Issued Devices Maga           6         QD2R10         1         1         0           6         QD2R10         1         1         0           9         QD2R10         1         1         0	Alerts: Con Alert Local Maintenance Overdae Item
Top Employees with Issued Tools       Phillips, Preston C     10       Fly, David C.     1       Rogers, Fred     1       Chman, Joe     1       SoperUser     1       Runner, Rhode     1	Top Work Locations with Issued Tool Item assembly 9000 3 False Org 1 Work Loc2 1	Top Devices with Issued Tools Tool Crib 15 Pretons Klosk 3	Sent Events me Action Part Number Employee (20/2024 3:01:50 PM Tool home location changed PT1900AL SuperUse	Source Destination



4. The user is then shown a summary screen showing that the tool has been returned to the tool crib.



5. The tool has now been moved from the original device to the tool crib. A look at the main screen of that device will confirm it is no longer a part of its inventory.



#### Tool Deactivation (Tool Scrap) Process

Sometimes a tool may be broken and need to be scrapped and replaced. To accomplish this in the L5 Connect system a tool needs to be **deactivated**. The process will prevent the tool from showing up in inventory or being issued, but all its history will still be available.

- 1. The user follows the tool swap process to remove the tool from its current device and return it to the tool crib.
- 2. The user logs into the crib as an attendant.
- 3. The user finds the tool deactivated in the list of tools with an alert and right clicks the tool. Then he selects the **Deactivate** option.

45 Snap-on True-Crib, v:9.11.2.0802, Tool Crib																			-	o ×
TRUE-C		R <i>IE</i>	3													S A	<b>ttendar</b> uperUse	<b>nt</b> er	(	Click to logout
				SCA	N EM	IPLOYEE BAL	DGE T	O START											2	<b>)</b>
			Device	Status ! 1	1	1 Hide OK Items	Alerts	:				Issued To Work Loc	ols ation !	Status	<b>/</b> 2		Alerts:			
			Name	Alerts Issuer	Issue	d Users Mngd Out	Alert		Loc	ation	Tool	Name	Alerts	Issued	Issued User	slssued	Devices 1	Mngd Out	Alert	Loca
System Status <u>Fi</u>	lter	<u>ed</u> <u>Total</u>	Tool Cri	b 11 14		5 1	Maint	enance Overdue	Too	ol Crib	QD3R25	False Org	0	1	1		1	0	Maintenand	e Overdue Item
Devices Online :	1	1					Maint	enance Overdue	Too	ol Crib	QD3RM:	Work Loc2	2 0	1	1		1	0		
Devices Offline :	0	0					Maint	enance Overdue	Too	ol Crib	QD2R10									
Tools Issued :	14	14					In Tra	nsit	Too	ol Crib	DBTBM									
Users with Tools Issued :	5	5					Maint	enance Overdue	Too	ol Crib	QD2R10									
Devices with Tools Issued :	1	1					Maint	enance Overdue	Too		CTECHL									
Tools Issued with Alerts :	2	2					Maint	enance Overdue	100		CTECHL									
Managed Tools Out :	1	1					Maint	enance Overdue	Tee		CTECHL									
Tools Managed :	255	256					Maint	enance Overdue	Too	ol Crib	CTECHL									
							Maint	anance Overdue	Tan	A Crib	002810									
								Jump to			- E								_	
<u> </u>			Ľ.			<u></u>	_	Deactivate C	D2R1	100	$-\mu$	<u>`</u>	_							,
Top Employees with Issued Tools	_	Top Work L	ocations	with Issued	Tool	Top Devices w	ith Iss	Deliver QD2	R100		ven	ts								
Phillips, Preston C.	10	Item assembly 9	000		3	Tool Crib			14	Time	Action	Part Number	Employ	ee Sou	rce Destina	ation				
	-1				_				-											
Fly, David C.	1	False Org			1	Test Kiosk			3											
Rogers, Fred	1	Work Loc2			1															
Chwan los	1																			
ciwai, soc	-1																			
Runner, Rhode	1																			
·	-																			
	1																			
	1																			
l						l .														

In the unlikely case that your crib has a custom dashboard where the device status widget is not present, there is an alternate approach.

1. The user logs into the crib as an attendant.



2. The user clicks the Administration Mode button and enters admin credentials.

			SCAN EN	IPLOYEE BAL	OGE TO START						Į			
System Status Devices Online : Devices Offline : Tools Issued : Users with Tools Issued : Devices with Tools Issued : Tools Issued with Alerts : Managed Tools Out : Tools Managed :	Filtere 1 0 14 5 1 2 1 255	ed Total 1 0 14 5 1 2 1 256	Device Status 11 2	1 Hide OK Items I Users Mngd Out 5 1	Alert L Maintenance Overdue 1 Maintenance Overdue 1	Acation Toco bol Crib QC bol Crib Cri bol Crib Cri bol Crib Crib QC	01 03R25 03RM 02R10 02R10 02R10 02R10 02R10 02R10 02R10 02R10	Issued Too Work Loco Name False Org Work Loc2	ols ation Stat Alerts Issu 0 1 0 1	ed Issued U	2 Jsers Issued Dev 1 1	ices Mngd Out 0 0	Alert Alert Maintenance	Overdue It
Top Employees with Issued Tool Phillips, Preston C. Fy, David C. Rogers, Fred Chwan, Joe Runner, Rhode	10 1 1 1	Top Work Lo Item assembly 9 False Org Work Loc2	coations with Issued Tool 000 3 1 1	Top Devices wi	th Issued Tools	Recent Time A	Event	ts Part Number	Employee	Source De	stination			

3. The user goes to the **Tools** tab and selects the master tool type of the broken tool on the left-hand side.

5 Snap-on True-Crib, v:9.11.2.0802, Tool Crib				0. (00. ()po 0			- a ×
TRUE-CR	<b>RIB</b>						SuperUser
Tools Tool States Locations En	nployees Groups	History Rep	orts Exit			_	Current Location: Tool Crib
<b>Q</b> q <b>X</b>	E.						
Part Number	QD2F	100	the second second	1 P-+			
OD2R100	3 iorqu	e wrench, Adj. Cli	ck-type, U.S., Fixed	I-Ratchet, 20-100 ft. 10., 3/8	arive		
QD2R1000	Info Instances	Maintenance	Contained In	Quantity Monitoring	Attachments	Optical Toolbox	1
QD3R250	Part Number Q	D2R100			cPho	to	
QUSKWSU	Description	orque Wrench, Adj	. Click-type, U.S., F	ixed-Ratchet, 20-100 ft. lb.	, 3/8"		
	di la contra di	rive Durahla					
	Issue Benavior						
	Units						
	Tag N	/T100014 0					
	Varifications -						
	Vermeations						
	Issued						
	Return						
	Optical Toolbox	c			_		
	Default Tolerance						
Show Deleted Items							



4. The user clicks the **Instances** sub-tab.

5 Snap-on True-Crib, v:9.11.2.0802,	, Tool Crib															- 0	×
TRUE	<b>-</b> C	R/	B												<b>Attendant</b> SuperUser		
Tools Tool States	Locations	Employee	s Group	s Histo	y Re	ports Exit	t								Curren	t Location: Too	l Crib
Q q Part Number QD2R100		× •	Q To	<b>D2R100</b> rque Wrenc	h, Adj. Cl	ick-type, U.S.,	, Fixed-	Ratchet, 20-	100 ft. lb., 3/8	3" drive							
QD2R1000		Info	Instance	a Maint	enance	Container	d In	Quantity N	Aonitoring	Attac	hmente	Ontica	I Too	lbox			
QD3R250			Instance		enance	Contained	u iii	Quantity	nonintorning	Attac	liments	optica	1 100	IDOX			
QD3RM30			Show De	leted Items													
			⊖ Hom	e Location	⊘ Add	litional Info	🕑 U:	ser Label 2	Serial N	umber	🕑 Custo	mer ID	Qty			Work Location	• • K
			Tool Crib								Torque!		1	Rogers, Fred 10	/21/2021 4:23 PM	Item assembly 9000	Kit Ma
			Tool Crib										1				Kit Ma
			Tool Crib										1				Kit Ma
			Tool Crib										1				Kit Ma
		1	Tool Crib										1				Kit wit
		<															>
		_															
Show Deleted	Items																

5. The user finds the instance of the tool type that needs to be deactivated and right clicks it to bring up the context menu. Then the user clicks the **Deactivate** option.

Snap-on True-Crib, V.9.11.2.0802, Tool Crib												- 0	
TRUE-CR	R <i>IE</i>	3									SuperUser		
Tools Tool States Locations Em	nployees	Groups Histor	y Reports E	xit							Curren	t Location: Tool	l Crib
		0											
• •		OD2R100											
Part Number ~		Torque Wrenc	h, Adj. Click-type, U.	S., Fixed	d-Ratchet, 20-	-100 ft. lb.	3/8" drive	2					
QD2R100	3												
QD2R1000	Info	Instances Maint	enance Contain	ned In	Quantity	Monitorin	a Atta	chments	Ontica	al Too	blbox		
QD3R250							9 1		-				
QD3RM30		Show Deleted Items											
		Home Location	Additional Inf	0 0	User Label 2	🕑 Seria	l Number		omer ID	Qty	✓ Issued	✓ Work Location	• • K
		Tool Crib						Torque!		1	Rogers, Fred 10/21/2021 4:23 PM	Item assembly 9000	Kit Ma
		Tool Crib		+						1			Kit Ma
	1	Tool Crib								1			Kit Ma
	1	Tool Crib		_						1			Kit Ma
	1	Tool Crib		Jump	to	•				1			Kit wit
	<		_	Deacti	vate QD2R100								>
Show Deleted Items													

6. The tool is now deactivated but will still show up in the history tab or reports.



#### **Tool Display Formatting**

Tool Display Formatting controls the appearance of tool data on device controls. A tool's "extended" information can be added to most device displays in the L5 Connect System. For example, a tool's Serial Number can be added to the "Primary" and/or "Details" columns as shown below. Any changes made to the "Primary" or "Details" columns will be reflected in the headers of the columns, with the value chosen by the user automatically input into the column headers. **Note: Changes will have system wide effects.** 

**Required Permissions:** 

- Admin Client Access Edit
- SystemConfigEdit

5	IE]De	7	Z Z97BB012 Tool Kiosk	
6	<b>%</b> 11			
	Part Number Serial Number		Details	
*	NT001 Serial#		Allen Wrench Set SuperUser 12/22/2023 9:07 AM, In In Trans	*
L.	434HDC Serial#434HDC-1	Door 11	<sup>3</sup> /4" DR SET w/CASE & FOAM Socket, Sue 3/7/2024 2:13 PM	
L.	ATI590L Serial#ATI590L-01	Door 5	Kit - Rivet shaver Socket, Sue 3/7/2024 2:13 PM	•
e je	CTECH4R600A Serial#TW-0001	Door 6	600 ft. lb. torque wrench Socket, Sue 3/7/2024 2:13 PM	
e se	CTECH4R600A Serial#TW-0002	Door 17	600 ft. lb. torque wrench Socket, Sue 3/7/2024 2:13 PM	•
Le la	CTECH4R600A Serial#TW-0003	Door 16	600 ft. lb. torque wrench Socket, Sue 3/7/2024 2:13 PM	

434HDC Serial#434HDC-1	¾" DR SET w/CASE & FOAM; 434HDC-1	•
Door 11		
CTECH4R600A		
Serial#TW-0001	600 ft. lb. torque wrench; TW-0001	→
Door 6		

Tools leaving with me							
		Part Number Serial Number	Details				
	S.	CTECH4R600A Serial#TW-0002	600 ft. lb. torque wrench Socket, Sue 3/7/2024 4:28 PM		Ļ		



#### Setup Tool Display Formatting

- 1. To begin, select the **Settings** Tab on the Admin Client
- 2. Select **System Configuration => Tool Display Formatting** from the list of choices on the left <sup>15</sup> Snap-on L5 Connect Admin Client, v:9.9.8.0216



Primary – This is the column that displays the tool's part number by default.
 a. The value can be changed from default by using the drop-down menu shown below.

#### **Tool Display Formatting**

Primary (Primary reference field shown on to	ol grid displays) —
Part Number	~
Part Number	
Description	
Serial Number	[
Customer ID	

b. Multiple values can be displayed simultaneously by entering "Advanced Mode". Hover over the Advanced Formatting field to see a list of available values and their required formatting. Any desired labels can also be added as shown below. For example, if you want to display a tools part number and the serial number below it, then you would type the following.

#### **Tool Display Formatting**

Primary (Primary refe	rence field shown on tool g
Advanced Formatting:	{0}\n{3}
Restore Default Details (Detailed infor Description	\n - New Line           {0} - Part Number           {1} - Description           {2} - Serial Number           mation sh           {3} - Customer ID           {1} - UDFText           {u2} - UDFNum           {u3} - UDFDec           {u4} - UDFChate           {u5} - UDFChate



This information will be displayed on the ATC device as shown below.

	Part Number Serial Number	Details	
*	NT001	Allen Wrench Set SuperUser 12/22/2023 9:07 AM, In Transit In Trans	*
<b>S</b>	ATI590L ATI590L-01 Door 5	Kit - Rivet shaver Socket, Sue 3/7/2024 2:13 PM	
e de la companya de l	CTECH4R600A TW-0002 Door 17	600 ft. lb. torque wrench Socket, Sue 3/7/2024 2:13 PM	•
e de la companya de	CTECH4R600A TW-0003 Door 16	600 ft. lb. torque wrench Socket, Sue 3/7/2024 2:13 PM	

You can also add custom text using the advanced formatting option. If you want to display the part number and serial number, you can add a text to distinguish between the two like the example shown below.



Part Number Serial Number	Details	• •
A2A Serial#AZ-0200 Dwr 1	Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16" Socket, Sue 3/7/2024 4:02 PM	
FRHM18 Serial#TW-0002 Dwr 1	Wrench, Metric, Crowfoot, Flare Nut, 18 mm, 6-Point Socket, Sue 3/7/2024 4:02 PM	
TMM10 Serial#AW-0001 Dwr 1	Socket, Metric, Shallow, 10 mm, 6-Point Socket, Sue 3/7/2024 4:02 PM	



4. Details

a. Up to three values can be displayed in the "Details" field in the "Simple" mode. Click the **"plus"** to add a field and the red **X** to remove a field.

Details (Detailed information shown on tool grid displays)		
	×	+
Description	Customer ID	*
Restore Default Advanced Mode		

b. Additionally, Advanced Mode is available for Details and uses the same formatting as the Primary (Please see the above section for formatting).

Advanced Formatting: {1}; {3}	
Restore Default Simple Mode	\n - New Line {0] - Part Number {1] - Description {2] - Serial Number [3] - Customer ID {u1] - UDFText {u2] - UDFNum {u3] - UDFDec {u4] - UDFDate {u5} - UDFCheck

- 5. When all the desired formatting changes have been made, click the **Save** button in the upper right corner to commit.
- 6. The changes will automatically be pushed to all devices in the system. **Note: a restart of the User Interface may be required before the displays will update.**



#### **Tool Quantity Monitoring**

When you have a consumable, you need to keep track of the inventory and know when to restock and reorder. You can do this with Quantity Monitoring, which is customizable and can be set anywhere in the location tree to monitor a specific tool. When you set a monitor, it applies to the current Location it is set at and any sub-locations below it.

There are two types of Monitors:

- **MIN/MAX** This Monitor keeps track of the total available inventory. When the count falls below the MIN value, it shows up in the RESTOCK REPORT. This Monitor is typically set at the Device level.
- **REORDER** This Monitor keeps track of the total available inventory as well. When the count falls below the Reorder Point value, it shows up in the REORDER REPORT. This Monitor is typically set at the Organization Level.

You can create a monitor from either the Tools Tab or the Locations Tab of the Admin Client.



#### Creating a Monitor from the Tools Tab

In the admin application, open the **Tools** tab and select a consumable tool, then select the Quantity Monitoring Tab.



Click the green **New** button and select the location where you want this Monitor to reside. Here you are creating a restock monitor so you will select the **Tool Crib East** location.



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Click the green checkmark **OK** button. You are now presented with the Monitor Properties dialog.

GLOVE7	LB (Top Level)	
Min Qty		1 Pair
Max Qty		1 Pair
Reorder Point		1 Pair
Reorder Qty		1 Pair

Since you are creating a restock monitor, you need to define the **Min Qty** and **Max Qty** values. These are latex gloves, so you want to have at least 50 pairs and should have no more than 250 at this Location. So, you would set the values like this.

GLOVE7	B (Top Level)	
Min Qty	50	1 Pair
Max Qty	250	1 Pair
Reorder Point		1 Pair
Reorder Qty		1 Pair

Click the blue **Save** button to save the Monitor. Then click the blue **Save** button to save the tool.

45 Snap-on L5 Connect Admin Client, v:9.12.3.1029				_							- a ×
STATE	5	Top Level			Change Cu	urrent Locatio	" 🍰 s	SuperUser			Click to logout
		Dashboard	Locations	Tools To	ol States	Employees	Groups	History	Reports	Settings	
۹ ×											<u> </u>
Part Number	GLOV	E7LB								-	
		D LATX TECH GL	VS								
GFASE			~								
GLASS12RKA	Info Instances	Maintenance	Containe	d In Quantit	ty Monitoring	Attachn	nents 0	ptical Toolb	ox		
GLASS50R											
GLOVE3XLB											
GLOVE7LB	<ul> <li>Home Location</li> </ul>	Min	Qty Max Qty	Reorder Point	Reorder Qt	y Units					
GLOVE7MB	Top Level/Maintenance/To	ol Crib East 50.00	250.00			1 Pair X					
GLOVE7XLB	u										
GSAF1E	1										
HBFE24	1										
HBFE32	1										
HBFE48	1										
HBPT16	1										
HD4SG	1										
HS18A	1										
IMFS120	1										
IMFS140	1										
IMF5160	1										
IMES200	1										
IMFS220	1										
IMFS240	1										
IMFS260	1										
IMFS280	1										
IMFS300											
IMFS320 V											
Show Deleted Items	1										



#### Creating a Monitor from the Locations Tab

Now that you have a monitor set for restocking, let's create another one for reordering when inventory gets low. You set this at the organizational level so that the monitor can see the inventory levels of all sub-locations.

Open the Locations tab, select the Maintenance location, and then go to the Quantity Monitoring tab.

45 Snap-on L5 Connect Admin Client, v:9.12.3.1029										- a ×
STATE	T		Top Level			Change Curr	rent Location	SuperUser		Click to logout
			Dashboard	Locatio	ns Tools To	ol States En	nployees Group	os History Re	ports Settings	
Q =>										
Name ~		Mainte	nance	-						
4 Top Level		Organiz	ational Loca	ion						
Maintenance										
Brake Shop	Info	Profiles	Profiles	Options	Subscriptions	Audit Types	Quantity Moni	toring Attachme	ents Favorites	
Calibration Lab		(Employee)	(Group)							
Engine Shop										
Heliconter Maintenance Han										
Helicopter Maintenance H	🕑 Hon	ne Location	$(\mathbf{v})$	Part Numbe	r 🕑 Descriptio	n Min Otv	Max Oty Reorder	r Point Reorder Otv	Units	
Helicopter Maintenance H	0				0					
Helicopter Maintenance H	Top Level/	Maintenance/Tool	Crib East GLO	VE7LB	LRG HD LATX TECH	GLVS 50.00	250.00		1 Pair	
4 Helicopter Maintenance H										
Tool Box 1										
Plane Maintenance Hangar     Plane Maintenance Hanga										
Plane Maintenance Hanga										
Plane Maintenance Hanga										
Plane Maintenance Hanga										
Tool Crib East										
4 Manufacturing										
Assembly Area A										
Assembly Area A Line 0										
Assembly Area A Line 2										
✓ Assembly Area B										
Assembly Area B Line 0										
Assembly Area B Line 1										
Assembly Area B Line 2										
<										
Show Deleted Items										

You can see the Monitor you have already created because it is a child location to the one you have selected. You will again click on the green **New** button. This time you are asked to select a tool.





Move your mouse to the White Space and select the **GLOVE7XLB** tool.



You are presented with the monitor properties screen again. This time you will set the **Reorder Point** and **Reorder Qty** values. Say that if you have less than 500 pairs of gloves, you will reorder 2000.





Click the blue **Save** button to save the Monitor. Then click the blue **Save** button to save the tool.



You now have two monitors set to tell you if you need to restock or reorder this specific part when inventory runs too low.



## Deleting a Monitor

If you want to remove a Monitor, select that monitor and then click on the **Delete** button at the end of the monitor's row.

45 Snap-on L5 Connect Admin Client, v:9.12.3.1029														- o ×
STATE	<b>T</b>		Top Leve	1		Cł	nange Curi	rent Locatio	on Su	perUser				Click to logout
	-)		Dashbo	oard Location	s Tools	Tool Sta	ites En	nployees	Groups	History	Reports	Settings		
Q =>														
Name `		Mainte Organiz	nance rational I	ocation										
▲ Top Level		organiz	actorial E	ocution										
4 Maintenance									_					
Brake Shop Calibration Lab	Info	Profiles (Employee)	Profile (Grou	es Options	Subscription	ns Au	dit Types	Quant	ity Monitorin	g Attach	ments	Favorites		
Engine Shop		(											_	
Flight Operations														
4 Helicopter Maintenance Han				<u> </u>	0									
Helicopter Maintenance H	🕑 Hor	me Location		Part Numbe	r 🕑 Descrip	tion	Min Qty	Max Qty	Reorder Poi	nt Reorder (	Qty Unit	s		
Helicopter Maintenance H	Top Level	I/Maintenance		GLOVE7LB	LRG HD LATX 1	ECH GLVS			500.00	2000.00	1 Pair			
Helicopter Maintenance H	Top Level	l/Maintenance/Too	l Crib East	GLOVE7LB	LRG HD LATX 1	ECH GLVS	50.00	250.00			1 Pair	X		
Tool Box 1														
A Plane Maintenance Hangar						Τ								
Plane Maintenance Hanga														
Plane Maintenance Hanga														
Plane Maintenance Hanga														
> Tool Crib East														
✓ Manufacturing														
✓ Assembly Area A														
Assembly Area A Line 0														
Assembly Area A Line 1														
Assembly Area A Line 2														
Assembly Area B Line 0														
Assembly Area B Line 1														
Assembly Area B Line 2														
Einal Accombly Area														
Show Deleted Items														

Then click the blue **Save** button to save the change.



### Quantity Monitoring Reports

There are two built-in reports that can be run to help with monitoring your tool quantities. There is a **Tool Quantity Monitor Reorder** report and a **Tool Quantity Monitor Restock** report.

You can run these reports by going to the **Reports** tab, selecting the desired report, and clicking the **Run** button.



If you run the reorder report, you will see that the gloves show up because the current quantity is below the reorder point. This would allow you to see all the different consumables you need to reorder in one place.



○ Part Number ⊙ Description ⊙ Storage Location Name Loc. Qty Reorder Point ⊙ Units GLOVE7LB LRG HD LATX TECH GLVS Top Level/Maintenance 10.00 \$500.00 1 Pair	erresn   Alsx

If you run the restock report, you will see that since the quantity of gloves is below the minimum quantity, the gloves show up as needing to be restocked. This report lets you quickly see which consumables in your system need to be restocked.

			Too	Qua	ntity N	lonito	or Resto	ock		<b>8</b>
Filtering Sticky Fil Run Time	ters: Location = Top :: 11/1/2024 10:56 /	o Level AM : Central Standard Time							Auto-Refresh	Xlsx Č
Part Number GLOVE7LB	⊙ Description	Storage Location Name	Loc. Qty 10.00	Min Qty 50.00	⊙ Units 1 Pair					



#### Changing the Master Tool of a Tool Instance

In some instances, it may be desirable to change the master tool of a tool instance. For instance, you have a set of Allen wrenches in a case that is defined as a single tool in your system, and you decide to make the case a kit and add the individual Allen wrenches as tools in the system. In this case you would create a new kit master tool and transfer the case to that. Then you could set up the individual wrenches and add them to the new kit. Another case where you might want to change the master tool of a tool instance is if part of your organization had stricter requirements for verifications than the rest of the organization. You could create a new master tool for the location that has the stricter requirements. The additional required verifications would be added to that new master tool. All the instances of that tool type in the applicable area could then be changed to the new master. Those modified tool instances would then inherit the required verifications.

#### Procedure

We will assume that the new master tool already exists for this case. Open the Admin application and go to the **Tools** tab. Then select the master tool of the instance you wish to change.

(John)	<b>T</b> D	Top Level			Change Cu	urrent Locatior	, 🏂 s	uperUser				Click to logout
Dep								·	~			
		Dashboard	Locations	Tools Tool S	States	Employees	Groups	History	Reports	Settings		
Part Number	<b>434H</b> 34" DI	<b>DC</b> R SET w/CASE & F	OAM	ſ								
1410 NO KEY	Info Instances	Maintenance	Template	Contained In	Quanti	ity Monitorin	a Attac	hments	Certification	ontica	Toolbox	)
1650	into instances	Municenance	remplate	contailed in	quanta	ity monitoring	9 / ////		certification	opica	TOOIDOX	1
1AM1541	Part Number 4	34HDC				(	Photo -		1			
1DA221HP NO WRENCHES	Description 3/4	" DR SET w/CASE	& FOAM									
208CCP	Issue Behavior	Kit				~						
235605	Units											
3852T43	_				_							
	Tag			[⊘] × []⊕]	*							
47ACP 5970000374158					_		_					
6T-SGHF614BR	∫ Verifications —					l	0	×				
87CF						ι	_					
8MA-SGHF615BR	Issued	<u>e</u>										
8R-SGHF614BR	Return	$\mathcal{O}$										
91ACP	L											
96CF	Coptical Toolbox	۲ — — — — — — — — — — — — — — — — — — —										
97CCP												
A2A	Default Iolerance											
AC5B												
AT380												
AT1429A-1												
A11429A-2												
Show Deleted Items												



Select the **Instances** sub-tab. Then double click the instance of the tool for which you want to change the master tool.

		Top Level			d 6 4	.   🧟	SuperUser			-	
Hall to lake	=///				Change Current Loca	tion	,			<u> </u>	ick to logout
		Dashboard	Locations	Tools	States Employees	Group	e Histor	Reports	Settings		
		Dashbuaru	Locations		States Employees	Group		Reports	Settings		
۹	S										
Part Number v	434HI		50414								
	94 DR	SET W/CASE Q	FUAIVI								
10MA-SGHF616BR					~						
1410 NO KEY	Info Instances	Maintenance	Template	Contained In	Quantity Monito	ring 🛛 At	tachments	Certificati	ons 🕴 Optical Too	lbox	
1650	<b>A</b>										
		Items									
1DA221HP NO WRENCHES	Home	ocation 📿 A	ditional Info	User Label	Serial Number	Custo	mer ID Otv		Work Location	🔍 Kit	
208000						0	qty	0.00000	0	0	
235005	Tool Crib East	<b>-</b>					1				X
3832143	Z93AU001				434HDC-1		1				
434HDC	Z99LS001				434HDC-5		1				_
4/ACP	Z99LS001				434HDC-4		1				_
5970000374158	Z99LS001				434HDC-2		1				-
01-30HF014BK	Z99LS001				434HDC-1		1				_
	<u> </u>				1						
014CD											
Dece											
90CF											
A2A											
ACSR											
AT380											
ATI4294-1											
AT1429A-2											
······											
Show Deleted Items											

Click the **Change** button that looks like a pencil located next to the part number and description of the tool.

Editing 434HDC	$\odot$
434HDC <sup>3</sup> / <sub>4</sub> * DR SET w/CASE & FOAM Top Level/Maintenance/Tool Crib East	
Info Issued Status Kit Attachments	
Customer ID	
Serial Number (Tool)	
Additional Info	
User Label 2	
Color ID Tag 🖉 🗙	
Home Location Tool Crib East 🖉	
ToolID 227935	
Default Part # / Desc. 434HDC / ¼* DR SET w/CASE & FOAM	



Now you can select the new master tool for your tool instance. The search box can be helpful to find the one you want.

	Select new value: Master Tool (¾" DR SET w/CASE & FOAM)
(a dbk 🖛 🛛 💌	
Part Number Clea	
DBK001	

Once you have selected the new master tool, click the **OK** button that looks like a green checkmark.

	Se	elect new valu	e: Master 1	ool (¾″ DR S	ET w/CASE & FO	AM)		
dbk     X     Part Number     DBK001	Drill E	001 Bit Kit, Standard						
	Info Instances	Maintenance	Template	Contained In	Quantity Monitori	ng Attachments	Certifications	Optical Toolbox
	Part Number D Description D	BK001 Irill Bit Kit, Standar	d	-		Photo	]	
	Issue Behavior	Kit						
	Units							
	Tag				*			
	Verifications —							
	Issued							
	Return							
	Optical Toolbo	к ———						
	Default Tolerance							

Now your tool instance has a new master tool!



#### Reports

The L5 Connect<sup>™</sup> system comes with an easy-to-use reporting tool that you can use when you need to get detailed information about your tools and the L5 Connect<sup>™</sup> system. These reports can be generated with the **L5 Connect<sup>™</sup> Admin Client** or the Admin Mode within **True-Crib<sup>™</sup>**.

You will be working within the L5 Connect<sup>™</sup> Admin Client for this section. Still, the method of generating reports in **True-Crib<sup>™</sup>** client is identical.

The L5 Connect<sup>™</sup> Reporting engine uses three types of reports:

- **Built-in** these are the pre-configured, hard-coded reports that come preloaded into the system.
- **Personal** these reports are custom modifications to the Built-in Reports. Only the Employee who creates the Report can use them unless they share it.
- **Shared** These are Personal Reports that an employee has shared so that anyone with report access can run the Report.

The Icons beside them also represent the type of the Report.

- If there is not an icon that represents a Built-In Report Report that came preloaded with the system.
- Represents Personal Report This Report can only be used by the Employee who created it.



• Represents Share Report – Anyone who has access to run reports can run this one.



All Personal and Shared Reports are created based on one of the Built-in Reports. When you select one of these Builtin reports, you will then see the Report Customization Sub-screen. On this screen, you can modify the Report presets to customize the Report to fit your needs, then save it as a Personal Report that you can then share. All reports can be printed or exported. The supported formats for export are PDF, XLSX, and RTF.



#### Running a Report

1. To generate a report, you simply need to select which available report you want to run and click the ► button.

45 Snap-on L5 Connect Admin Client, v:9.12.1.1001					– a ×
STATE	Top Level		Change Current Location	SuperUser	Click to logout
	Dashboard	Locations Tools	Tool States Employees	Groups History Reports Settin	ngs
Access Summary Device Access Permissions Employees Event History Inventory with Serial Number & Maintenance (Devices Only) Master Tool Inventory Tool Inventory Tool Inventory Tool Quantity Monitor Restock Tool Status Tool Status Tool Status Tool In Process Tools Insued	eport Configuration	D tory list of all the tools	n the system.		

2. This will display the results of the desired Report. This report viewer window has the same look and functionality as the screens in the **Tool States** tab. You can filter columns based on string text and you can save the file in xlsx, pdf, or txt format.

⊙ Show: Trained Drawer Image		$\overline{\mathbf{S}}$				
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 3:06 PM : Central S	Auto-Refresh	Xis	SX v			
Storage Location Name	⊘ Part Number	Description	Drawer	Tool ID	D To	
Z91BJ001	SGDET210	Screwdriver, TORX®, Electronic Miniature, T10	5	225372	1	
Z91BJ001	SGDET215	Screwdriver, TORX®, Electronic Miniature, T15	5	225370	1	
Z91BJ001	SGDET220	Screwdriver, TORX®, Electronic Miniature, T20	5	225371	1	
Z91BJ001	SGDET26	Screwdriver, TORX®, Electronic Miniature, T6	5	225392	1	
Z91BJ001	SGDET27	Screwdriver, TORX®, Electronic Miniature, T7	5	225391	1	
Z91BJ001	SGDET28	Screwdriver, TORX®, Electronic Miniature, T8	5	225390	1	
Z91BJ001	SGDET29	Screwdriver, TORX®, Electronic Miniature, T9	5	225389	1	
Z91BJ001	SGDMRC4-40	Shank/Bit Holder, Magnetic, 5"		102548	1	
Z91BJ001	SGDMRC4-40	Shank/Bit Holder, Magnetic, 5"	3	225311	1	
Z91BJ001	SGDMRC4-40	Shank/Bit Holder, Magnetic, 5"	3	225312	1	
Z91BJ001	SGDMRC4A	Screwdriver Handle, Ratcheting, Soft Grip, Standard, Red		102547	1	
Z91BJ001	SGDMRC4A	Screwdriver Handle, Ratcheting, Soft Grip, Standard, Red	3	225309	1	
Z91BJ001	SGDMRC4A	Screwdriver Handle, Ratcheting, Soft Grip, Standard, Red	3	225310	1	
Z91BJ001	SGT4BR	Driver, Standard Shank, Instinct Soft Grip Handle, 1/4" drive, 7"	1	225167	1	
Z91BJ001	SHD10	Screwdriver, Flat Tip, Instinct™ Hard Handle, Orange, .040"		102549	1	
Z91BJ001	SHD10	Screwdriver, Flat Tip, Instinct" Hard Handle, Orange, .040"	3	225316	1	
Z91BJ001	SHD2O	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .035"		102532	1	
Z91BJ001	SHD2O	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .035 <sup>™</sup>	3	225317	1	
Z91BJ001	SHD40	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .040"		102531	1	
Z91BJ001	SHD4O	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .040"	3	225318	1	
Z91BJ001	SHD6O	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .050"		102530	1	
Z91BJ001	SHD6O	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .050"	3	225319	1	
Z91BJ001	SHD8O	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .055 <sup>™</sup>		102529	1	
Z91BJ001	SHD8O	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .055"	3	225320	1	
Z91BJ001	SHDP22IRO	Screwdriver, Phillips ACR, Instinct" Hard Handle, #2, Orange		102550	1	
Z91BJ001	SHDP22IRO	Screwdriver, Phillips ACR, Instinct <sup>™</sup> Hard Handle, #2, Orange	3	225315	1	
Z91BJ001	SHDP31IRO	Screwdriver, Phillips ACR, Instinct <sup>™</sup> Hard Handle, #1, Orange		102528	1	
Z91BJ001	SHDP31IRO	Screwdriver, Phillips ACR, Instinct <sup>™</sup> Hard Handle, #1, Orange	3	225314	1	
7918/001	SHDP42IRO	Screwdriver Phillips ACR Instinct <sup>™</sup> Hard Handle #2 Orange		102527	1	



3. Certain report types support viewing of additional image information. For example, when a tool from an optical toolbox is selected in the Tool Inventory report, the drawer image captured during the training process can be displayed by clicking the **Show: Trained Drawer Image** button.

Tool Inventory								
Show: Irained Drawer Image Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 3:06 PM : Central St	Que la companya de la	XIs	SX S					
Storage Location Name			Drawer	Tool IE	DТ			
Z91BJ001	SGDET210	Screwdriver, TORX®, Electronic Miniature, T10	5	225372	1			
Z918J001	SGDET215	Screwdriver, TORX®, Electronic Miniature, T15	5	225370	-ti			
291BJ001	SGDET220	Screwdriver, TORX®, Electronic Miniature, T20	5	225371	1			
91BJ001	SGDET26	Screwdriver, TORX®, Electronic Miniature, T6	5	225392	1			
91BJ001	SGDET27	Screwdriver, TORX®, Electronic Miniature, T7	5	225391	1			
91BJ001	SGDET28	Screwdriver, TORX®, Electronic Miniature, T8	5	225390	1			
91BJ001	SGDET29	Screwdriver, TORX®, Electronic Miniature, T9	5	225389	1			
91BJ001	SGDMRC4-40	Shank/Bit Holder, Magnetic, 5"		102548	1			
91BJ001	SGDMRC4-40	Shank/Bit Holder, Magnetic, 5"	3	225311	1			
91BJ001	SGDMRC4-40	Shank/Bit Holder, Magnetic, 5"	3	225312	1			
91BJ001	SGDMRC4A	Screwdriver Handle, Ratcheting, Soft Grip, Standard, Red		102547	1			
91BJ001	SGDMRC4A	Screwdriver Handle, Ratcheting, Soft Grip, Standard, Red	3	225309	1			
91BJ001	SGDMRC4A	Screwdriver Handle, Ratcheting, Soft Grip, Standard, Red	3	225310	1			
91BJ001	SGT4BR	Driver, Standard Shank, Instinct Soft Grip Handle, 1/4" drive, 7"	1	225167	1			
91BJ001	SHD10	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .040"		102549	1			
91BJ001	SHD10	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .040"	3	225316	1			
91BJ001	SHD20	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .035"		102532	1			
91BJ001	SHD2O	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .035"	3	225317	1			
91BJ001	SHD40	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .040"		102531	1			
91BJ001	SHD40	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .040"	3	225318	1			
91BJ001	SHD60	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .050"		102530	1			
91BJ001	SHD60	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .050"	3	225319	1			
91BJ001	SHD80	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .055"		102529	1			
91BJ001	SHD80	Screwdriver, Flat Tip, Instinct <sup>™</sup> Hard Handle, Orange, .055"	3	225320	1			
91BJ001	SHDP22IRO	Screwdriver, Phillips ACR, Instinct <sup>™</sup> Hard Handle, #2, Orange		102550	1			
91BJ001	SHDP22IRO	Screwdriver, Phillips ACR, Instinct <sup>™</sup> Hard Handle, #2, Orange	3	225315	1			
91BJ001	SHDP31IRO	Screwdriver, Phillips ACR, Instinct <sup>™</sup> Hard Handle, #1, Orange		102528	1			
91BJ001	SHDP31IRO	Screwdriver, Phillips ACR, Instinct <sup>™</sup> Hard Handle, #1, Orange	3	225314	1			
	CURRISING	Consultations Distance ACD Locality and Line differential and the second		403537				

4. You can also save a copy of this image by clicking the button with the downward arrow on it next to the **Trained Drawer Image** title over the image.

I	Tool	Inventory			C
Hide: Trained Drawer Image	Trained Dr	☑ Highlight: SHD2O / Screwdriver, Flat Tip, awer Image €	Instinct <sup>™</sup> Hard Handle, Ora	ange, .03	35"
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central	Standard Time		Que la construcción de la constr	n Xisi	<b>&gt;</b>
Filtering	Standard Time	© Description	Auto-Refresh	n Xisa	Х Х Х Тс
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Storage Location Name 2918001	Standard Time	Description Screwdrive, Flat Tip, Electronic Miniature, 3 mm tip, 5 3/4"	Auto-Refresh Drawer 5	Tool ID	× ~
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central : Storage Location Name 2918J001 2918J001	Standard Time	Oescription      Screadvive, Flat Tip, Electronic Miniature, 3 mm tip, 5 3/4*      Screadvive, Flat Tip, Electronic Miniature, 40 Up, 5 3/4*	Auto-Refresh	Tool ID 225362 225393	x ~
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central : Storage Location Name 2918/001 2918/001	Standard Time © Part Number SG0E20 SG0E20	Description     Screwdrive, Falt Tip, Electronic Miniature, 07 Up, 53/4*     Screwdrive, PHILLIPS*, Electronic Miniature, 07 Up, 53/4*	Auto-Refresh	Tool ID 225362 225393 225394	x v Tc
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Storage Location Name 2718J001 2718J001 2718J001	Standard Time	O Description      Screwdrive, Flat Tip, Electronic Miniature, 3 mm tip, 5 3/4"     Screwdrive, Flat Tip, Electronic Miniature, 40 tip, 5 3/4"     Screwdrive, PilLLIPS*, Electronic Miniature, 40 tip, 5 3/4"     Screwdrive, PilLLIPS*, Electronic Miniature, 40 tip, 5 3/4"	Auto-Refresh	Tool ID 225362 225393 225395	x v Tc 1 1 1
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central : Storage Location Name 2918J001 2918J001 2918J001 2918J001	Standard Time © Part Number SG0E20 SG0EP20 SG0EP20 SG0EP21 SG0EP210	Description     Screwdrive, Falt Tip, Electronic Miniature, 3 mm tip, 53/4*     Screwdrives, Falt Tip, Electronic Miniature, 47 tip, 53/4*     Screwdrives, Phillips, Electronic Miniature, 70 tip, 53/4*     Screwdrives, Philips, Electronic Miniature, 71 tip, 53/4*	Auto-Refresh	Tool ID 225362 225394 225394 225395	x v T T C
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Storage Location Name 2918001 2918001 2918001 2918001 2918001 2918001	Standard Time © Part Number SG0F200 SG0F270 SG0F270 SG0F270 SG0F270 SG0F270 SG0F2715	Oescription     Screwdriver, Fat Tip, Electronic Miniature, 70 tip, 5 3/4"     Screwdriver, PHILUPS*, Electronic Miniature, 40 tip, 5 3/4"     Screwdriver, PHILUPS*, Electronic Miniature, 70 tip, 5 3/4"     Screwdriver, PHILUPS*, Electronic Miniature, 710     Screwdriver, TORX*, Electronic Miniature, 710	Auto-Refresh	Tool ID 225362 225393 225394 225395 225370	x × ×
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central : Storage Location Name 2918/001 2918/001 2918/001 2918/001 2918/001 2918/001 2918/001	Standard Time © Part Number SG0E20 SG0E20 SG0E20 SG0E210 SG0E210 SG0E210 SG0E210 SG0E220	Description     Screwdrive, Fait Tip, Electronic Miniature, 70 tip, 53/4*     Screwdrive, PHILLIPS*, Electronic Miniature, 70 tip, 53/4*     Screwdrive, PHILLIPS*, Electronic Miniature, 70 tip, 53/4*     Screwdrive, PAIILIPS*, Electronic Miniature, 710     Screwdrive, PORX*, Electronic Miniature, 710     Screwdrive, TORX*, Electronic Miniature, 710     Screwdrive, TORX*, Electronic Miniature, 710	Auto-Refresh Drawer 5 5 5 5 5 5 5 5 5 5 5	Tool ID 225362 225393 225394 225395 225372 225371	x *
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Storage Location Name 2918001 2918001 2918001 2918001 2918001 2918001 2918001	Standard Time  © Part Number  SG0F20 SG0F20 SG0F21 SG0F21 SG0F21 SG0F23	O Description     Screwdriver, Flat. Tip, Electronic Miniature, 3 mm tip, 5 3/4"     Screwdriver, PHILLIPS*, Electronic Miniature, 400 tip, 5 3/4"     Screwdriver, PHILLIPS*, Electronic Miniature, 400 tip, 5 3/4"     Screwdriver, DHILB, Electronic Miniature, 710     Screwdriver, TORX*, Electronic Miniature, 715     Screwdriver, TORX*, Electronic Miniature, 716	Auto-Refresh Drawer 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	Xls: Tool ID 225362 225395 225395 225372 225370 225370 225370 225370	x * T T C 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central : Storage Location Name 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001	Standard Time © Part Number SG0F20 SG0F20 SG0F20 SG0F210 SG0F210 SG0F210 SG0F210 SG0F220 SG0F220 SG0F220 SG0F220 SG0F220 SG0F220	Description     Screwdrive, Fait Tip, Electronic Miniature, 3 mm tip, 5 3/4"     Screwdrive, Fait Tip, Electronic Miniature, 40 tip, 5 3/4"     Screwdrive, PHILLIPS*, Electronic Miniature, 70 tip, 5 3/4"     Screwdrive, PHILLIPS*, Electronic Miniature, 710     Screwdrive, TORX*, Bietcronic Miniature, 710	Auto-Refresh Drawer 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	Tool ID 225395 225395 225395 225372 225372 225371 225371 225392 225371	x v
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Storage Location Name 2918001 2918001 2918001 2918001 2918001 2918001 2918001 2918001 2918001 2918001	Standard Time  Soperation Soperat	O Description     Screwdrive; Flat Tip, Electronic Miniature, 3 mm tip, 5 3/4"     Screwdrive; Flat Tip, Electronic Miniature, 40 tip, 5 3/4"     Screwdrive; PrtILLIPS*, Electronic Miniature, 100 tip, 5 3/4"     Screwdrive; Pullic, Bestronic Miniature, 110     Screwdrive; TORX*, Electronic Miniature, 710     Screwdrive; TORX*, Electronic Miniature, 71	Auto-Refresh Drawer 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	Tool ID 225362 225394 225395 225372 225371 225397 225371 225392 225371 225392	x × ×



5. The red box and crosshairs to help find the specific tool selected can be toggled on and off by selecting or de-selecting the **Highlight: part number/description** checkbox.

$\checkmark$	Tool	Inventory			Ľ
Hide: Trained Drawer Image	Trained Dr	Highlight: SHD2O / Screwdriver, Flat Tip, I awer Image	nstinct <sup>™</sup> Hard Handle, Ora	ange, .03	15"
r Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Sta	indard Time			Xle	
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Sta	Indard Time		Auto-Refresh	Xis	<b>2</b>
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Sta © Storage Location Name	andard Time	© Description	Auto-Refresh	Xisa Tool ID	<b>X</b>
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Sta Storage Location Name 2918/001	indard Time	© Description Secredives, flat Tip, Electronic Miniature, 3 mm tip, 5 3/4*	Auto-Refresh	XIss Tool ID 225362	x v
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Sta © Storage Location Name 29180001 29180001 29180001	andard Time © Part Number SGDE220 SGDE220 SGDE220	Description     Screwdrive; Pat Tip, Electronic Miniature; #0 tip, 5 3/4*     Screwdrive; PrilLUPS*, Electronic Miniature; #0 tip, 5 3/4*	Auto-Refresh	Tool ID 225362 225393	x v
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Sta Storage Location Name 2918/001 2918/001 2918/001	indard Time © Part Number SODE200 SODE200	Description Screwdrive, Flat Tip, Electronic Miniature, 3 mm tip, 5 3/4* Screwdrive, PHILLIP5*, Electronic Miniature, 400 tip, 5 3/4*	Auto-Refresh	Xisa Tool ID 225362 225393 225394	
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Sta Storage Location Name 2918J001 2918J001 2918J001	andard Time © Part Number SGDE200 SGDE210 SGDE21	Description Screwdrive; PhiLuP5*, Electronic Miniature, 70 tip, 5 3/4* Screwdrive; PhiLuP5*, Electronic Miniature, 70 tip, 5 3/4* Screwdrive; PhiLuP5*, Electronic Miniature, 70 tip, 5 3/4*	Auto-Refresh	Xlss Tool ID 225362 225393 225394 225395	x v
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Sta © Storage Location Name 2918/001 2918/001 2918/001 2918/001	indard Time © Part Number SODE20 SODE20 SODE21 SODE210	Description     Sereadvive, Fait Tip, Electronic Miniature, 3 mm tip, 5 3/4*     Sereadvive, FNILLIPS®, Electronic Miniature, #0 tip, 5 3/4*     Sereadvive, PNILLIPS®, Electronic Miniature, #0 tip, 5 3/4*     Sereadvive, PNILLIPS®, Electronic Miniature, #1 tip, 5 3/4*     Sereadvive, PNILLIPS®, Electronic Miniature, #10	Auto-Refresh	Xlss Tool ID 225362 225393 225394 225395 225372	x v To 1 1 1 1
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Sta Storage Location Name 2918J001 2918J001 2918J001 2918J001 2918J001	andard Time © Part Number SGDE230 SGDE220 SGDE220 SGDE221 SGDE7215	Description     Screwdrive, Flat Tip, Electronic Miniature, 3 mm tip, 5 3/4"     Screwdrive, PHILLIPS®, Electronic Miniature, 70 tip, 5 3/4"     Screwdrive, Phillips, Electronic Miniature, 71 tip, 5 3/4"     Screwdrive, PAIIIDS®, Electronic Miniature, 71 tip     Screwdrive, TORX®, Electronic Miniature, 715	Auto-Refresh Drawer 5 5 5 5 5 5 5 5 5	Xlsz Tool ID 225362 225393 225395 225395 225372 225370	x v To 1 1 1 1
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Sta © Storage Location Name 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001	indard Time © Part Number SODE20 SODE20 SODE20 SODE210 SODE216 SODE215 SODE220	Description     Serewdrive, Flat Tip, Electronic Miniature, 3 mm tip, 5 3/4*     Serewdrive, FNILLIPS®, Electronic Miniature, #0 tip, 5 3/4*     Serewdrive, FNILLIPS®, Electronic Miniature, #10     Sorewdrive, TDIRS, Electronic Miniature, #10     Serewdrive, TDRX®, Electronic Miniature, 110     Serewdrive, TDRX®, Electronic Miniature, 113     Serewdrive, TDRX®, Electronic Miniature, 120	Auto-Refresh Drawer 5 5 5 5 5 5 5 5 5 5 5 5 5 5	Xlss Tool ID 225362 225393 225394 225395 225370 225370 225371	x v Tc
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Sta Storage Location Name 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001	indard Time SGDE230 SGDE720 SGDE720 SGDE7210 SGDE7210 SGDE7215 SGDE726	Description     Screwdriver, Flat Tip, Electronic Miniature, 3 mm tip, 5 3/4*     Screwdriver, PHILLIPS®, Electronic Miniature, 10 tip, 5 3/4*     Screwdriver, PHILIPS®, Electronic Miniature, 11 tip, 5 3/4*     Screwdriver, POR&8, Electronic Miniature, 11 tip, 5 3/4*     Screwdriver, TOR&8, Electronic Miniature, 115     Screwdriver, TOR&8, Electronic Miniature, 120     Screwdriver, TOR&8, Electronic Miniature, 16	Auto-Refresh Drawer 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	Xlss Tool ID 225362 225393 225394 225395 225370 225370 225370 225371 225392	x v To 1 1 1 1 1 1 1 1
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Sta <sup>⊙</sup> Storage Location Name 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001	Indard Time © Part Number SODE20 SODE20 SODE210 SODE210 SODE21 SODE215 SODE220 SODE220 SODE220 SODE226 SODE227	Oescription     Screadrive, Flat Tip, Electronic Miniature, 3 mm tip, 5 3/4 <sup>−</sup> Screadrive, FulLIDF8, Electronic Miniature, 40 tip, 5 3/4 <sup>−</sup> Screadrive, FulLIDF8, Electronic Miniature, 40 tip, 5 3/4 <sup>−</sup> Screadrive, TOR8, B. Electronic Miniature, 41 5, 5 3/4 <sup>−</sup> Screadrive, TOR8, B. Electronic Miniature, 715     Screadrive, TOR8, B. Electronic Miniature, 715     Screadrive, TOR8, B. Electronic Miniature, 715     Screadrive, TOR8, B. Electronic Miniature, 716     Screadrive, TOR8, B. Electronic Miniature, 76     Screadrive, TOR8, B. Electronic Miniature, 77	Auto-Refresh Drawer 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	Xlsz Tool ID 225362 225393 225395 225370 225370 225370 225370 225372 225392 225392	x v To 1 1 1 1 1 1 1 1
Filtering Sticky Filters: Location = Top Level Run Time: 12/16/2024 11:24 AM : Central Sta Storage Location Name 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001 2918J001	Indard Time SoDE20 SODE20 SODE20 SODE21 SODE7210 SODE7210 SODE7215 SODE725 SODE726 SODE726 SODE728	Description     Screwdriver, Flat Tip, Electronic Miniature, 3 mm tip, 5 3/4*     Screwdriver, PHILLIPS*, Electronic Miniature, 40 tip, 5 3/4*     Screwdrive, PHILLIPS*, Electronic Miniature, 110     Screwdriver, POIRS*, Blectronic Miniature, 110     Screwdriver, TORS*, Blectronic Miniature, 170     Screwdriver, TORS*, Blectronic Miniature, 170     Screwdriver, TORS*, Blectronic Miniature, 17     Screwdriver, TORS*, Blectronic Miniature, 17     Screwdriver, TORS*, Blectronic Miniature, 17	Auto-Refresh Drawer 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	Xlss Tool ID 225362 225393 225394 225395 225370 225370 225371 225391 225391 225399	Tc • •

NOTE: The results of the Report are dependent on the current Location. So, if you want to see all the issued tools for R&D Lab, you should set the current Location to R&D Lab and run the issue tools report.



#### Creating a Personal Report

Sometimes the built-in reports may not precisely fit your needs. You can customize these reports so that they can. These modifications are saved as new Personal Reports.

To create a personal report, click the **Change** button, which looks like a pencil to enable report configuration. You can then do things such as add or remove fields from the report, filter a field, change the width of a column, and reorder the fields in the report. We will cover each of these separately.



#### Add/Remove Fields from a Report

 Let's say that you want your event history report to include tool serial numbers, and you don't use work orders, so you want to hide that column. To hide the **Work Order** column, you would uncheck the checkbox at the beginning of that field. Then expand the **Tool Fields** group of fields by clicking the expander carat at



the beginning of the group.

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ATT-TO	<b>T</b>	Top Level			Change	Current Locatio	<u>n</u>	uperUser			Click to log
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×	Report Configuration	tion	ent history of t	hings that	have happened	d in the system.					۷۷
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2. Select the checkbox for the **Serial Number** field to add that to the report and then click the blue **Save** button that looks like a disk.

45 Snap-on LS Connect Admin Client, v:9.11.3.0903											- a ×
STITIC	TI	Top Level			Change	Current Locatio	n 🍃 Si	uperUser			Click to logout
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	User Label 2	0									
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	Tolerance (Poo	cket)									~


#### Filter a Field in a Report

Suppose you wanted this report to pull all the events for a tool with a specific serial number over the last 30 days. To do this you would add filtering to the **Serial Number** and the **Event Time** columns. To add a filter to a column, click



#### Date/Time Filtering

There are three types of filtering options for date/time filter types.

<---> Between Dates

<--- In the Last X Days

---> In the Next X Days

So, for the event time filter you would set the filter type to <--- and set the **Days** value to 30 to go back 30 days into the eventlog history.

✓ Event Time	← ×	30 Days	0 Hours	0 Minutes	×		$\mathbf{\overline{\mathbf{v}}}$
						U • J	

#### Listbox Filtering

Certain types of fields use listbox filtering. An excellent example of this is the **Employee** field. This field is a combination of **First Name**, **Middle Name**, **Last Name**, and **Title**. To filter by an employee, you would click the **Select New Filter Settings** button, which will display a list box filter.



The top box will display the employees that have been selected. By clicking in the bottom box, it will open the listbox which contains the list of employees from which the user can choose. You can either scroll through the list and select an employee or you can type in the lower box and the list will be filtered by the string typed in the box. This will help to shorten the list from which you need to choose. In this manner you can all multiple choices from the list to the filter until you have it like you want it.



	<b>☑</b> Employee	<ul> <li>Assembly Area A Line 0, Gene</li> <li>Assembly Area A Line 0, James</li> </ul>	$\times$ $\land$ $\checkmark$
		Area A	
	🗆 First Name	Assembly Area A Line 0, Anne Assembly Area A Line 0, Gene	
	🗆 Last Name	Assembly Area A Line 0, James Assembly Area A Line 0, Steve	
	🗆 Middle Nan	Assembly Area A Line 1, Becca	
	🗆 Title	Assembly Area A Line 1, Ben Assembly Area A Line 1, Chris	
	Employee C	Assembly Area A Line 2, Amy Assembly Area A Line 2, Lisa	
✓.	Affected Empl	Assembly Area A Line 2, Mike	
	Darant Course	Supervisor Assembly Area A, Polly	

#### String Filtering

String columns will have a text box into which you can type the string you want to match. Any event where that column contains the string in the filter box will be added to the report. So, to filter the report for a specific **Serial Number**, you click the filter button on that column and input the desired serial number value into the text box.

#### Numeric Filtering

Columns that contain numeric values such as **Quantity** use a numeric filter. There are 5 options for numeric filters.

- < Less than filter
- <= Less than or equal to filter
- = Equal to filter
- >= Greater than or equal to filter
- > Greater than filter

#### Change the Width of a Column

You can manually adjust the width of any column by clicking on the **Set column width** button, which looks like a ruler. This will expand the information shown for that column to include the default width of the column in a text box which you can modify.



✓ Serial Number	1DR429	×	Width 1.00	$\times$	·
-----------------	--------	---	------------	----------	---

You can then run the report without saving it to see what difference your change has made and tweak the width until it is where you would like it to be.

#### Reorder Report Fields

Each of the selected fields will be shown on the report in the order they appear in the list, with the top selected field first in the report and the last selected field in the last column. You can change the order of these columns, with some exceptions. Some fields are grouped together such as **Tool Fields** and **Employee Fields**. These groups cannot be separated, however the fields in the group can be reordered inside the group.

To move a field within the list of fields you would use the **Move up** and \*\* Move down\*\* arrows at the end of the field.



Using these buttons, you can rearrange the columns into the order you wish for your custom report.



#### Saving a Personal Report

Once you have made all the customizations you need to make and the report looks like you want it to, you can save the report by clicking the blue **Save** button that looks like a disk.



You will be prompted to provide a name and description for your new personal report. Enter the information and click the blue **Save** button.





Now your new custom personal report shows up in the list of reports. **NOTE: Other people will not see this report** in their list of reports.

	Top Level	Locations Tools	Change	Current Locatio	in Sroups	uperUser	Reports	Settings	Click to logout
Access Summary     Device Access Permissions       Employees     Event History       Event History 1DR429 இ     Inventory with Serial Number இ       Maintenance     Maintenance       Maintenance (Devices Only)     Master Tool Inventory       Tool Inventory     Tool Inventory       Tool Quantity Monitor Restock     Tool Status       Tool Status     Tools In Process       Tools Insued     Maintenance	eport Configuration escription Custom event history f Event Time Event Time Start Action Tool Fields Part Number Description Serial Number Serial Num Tool ID Employee Fields Affected Employee Fields Source Location Destination Location Drawer Info Data	Locations Tools	Tool States	Employees	Groups	History	Reports	Settings	



## Sharing a Personal Report

If you decide that you would like other users to be able to run your report as well, you can share your report. This will cause it to be seen in the list of reports for anyone who logs into the admin with permission to run reports.

To share your personal report, select the report and then click the **Share report** button.

TELETI	2 Top Level			Change	Current Locatio	m 🏂 s	uperUser			Click to logo
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
x Report Config Description Cur Event Time Action Fool Fields Part Numi Description Tool Fields Part Numi Description Serial Num Serial Num Seri	puration P Guardian Constraints of the second secon	er = 1DR429	107429 f	or past 30 days	Linproyees				Jarcings	

You will see a message telling you that this will allow other users to run the report. Click the **OK** button to continue and then click the blue **Save** button.

Sharing this report will allow all users to run the report. Cli cancel.	ck the save button to share or the cancel button to
ОК	

You will now be prompted to update the current report or create a new report. Choosing **Update** will change the current personal report to a shared report. Choosing **New** will cause a copy of the personal report to be saved as the shared report and the user will still have his personal report as well.

Would you like to update	e the curr	ent repo	rt or create a new report?
	Update	New	



For this example, we will choose **New**. You will then be prompted to give this new report a name and description just as you had to do when creating the personal report. Input the requested information and click the blue **Save** button.

	Save a new report
Name	Shared Event History 1DR429
Descri	otion
Event his	tory report filtered for serial number 1DR429 past 30 days

You can now see that your personal report, which only you see, is there as well as the freshly created shared version of the report.





## Deleting a Report

You can delete personal or shared reports, however the built-in reports cannot be deleted. To delete a personal or shared report, simply select it in the list and click the **Delete** button at the bottom of the list of reports.





## Scheduling a Report

You can schedule a report to automatically be run at a specific time and sent to the appropriate users. For example, you want a report each day that lets you know what tools are still issued at the end of the workday. You can schedule the **Tools Issued** report to run each day at 5 PM. You can then assign the report to be delivered to each of the supervisors so they can take any action if needed.

#### NOTE: You will need to have set up the SMTP settings and email addresses of the intended recipients beforehand, as these reports are emailed. See the SMTP Configuration document for more details.

To schedule this report, you would select the **Tools Issued** report and then click the **Schedule Report** button, which looks like a calendar.

45 Snap-on L5 Connect Admin Client, v:9.11.3.0903										- ø ×
Saman	Top Level			Change	Current Locatio	n 🍰 s	SuperUser			Click to logout
	Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings	
Report Configure Description This rep       Access Summary Device Access Permissions Employees Event History Event History 1DR429 இ Inventory with Serial Number இ Maintenance Maintenance Maintenance (Devices Only) Master Tool Inventory Tool Quantity Monitor Reorder Tool Status Tool Status Tools Insued     Storage Location       Tool Fields     Issued Time Issued Quantity Units       Employees Inventory with Serial Number இ Maintenance Maintenance Tool Unantity Monitor Reorder Tool Status Tools Issued     Imployee Fields       Work Location Sub Location     Sub Location Work Order       Magd Out of Box	Trion )		ently che	ecked out of the	system.					

This will open the report scheduling window. You will need to provide the information necessary to schedule the report. Start by adding a description of the report.

Creating scheduled report: Tools Issued							
Description End of Shift Issued Tools Report							
Destination   Employee   Group Assembly Area A Line 0, Anne							
Attachment         Date/Time         Language           Format         Inline v         English (United States)         English v							
Days Week Days Sun Mon Tue Wed Thu Fri Sat							
Time 5 : 00 PM (UTC-06:00) Central Time (US & Canada)							

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Next, you will need to provide the destination. It can be either an individual employee or a group of employees. For this case we would choose the **Group** radio button and then select the **Supervisors** group from the pull-down menu that will list all the groups available.

Creatin	g scheduled report: Tools Issued
Description	End of Shift Issued Tools Report
Destination O Employee Gr	roup Supervisors -
Format Attachment Date	e/Time Language States) × English ×
Days Week Days	Sun Mon Tue Wed Thu Fri Sat
Time 5 : 00 PM ~	(UTC-06:00) Central Time (US & Canada) 🎽

Next, we need to choose the Format for the report. The first thing we need to set is the **Attachment** type. The report can be a PDF, Xlsx, or an Rtf file attachment, or it can be put right into the body of the email itself with the **Inline** option. For this case we will select a PDF attachment to the email. You also need to select the **Date/Time** format that should be used in the report. This will make sure the dates in your report are presented in a format to your liking. And you will also want to set your **Language** for the report from the pull-down menu.

Creating	scheduled report: Tools Issued
Description	End of Shift Issued Tools Report
Destination O Employee	up Supervisors ~
Format Pdf v English (United Sta	Time Language ates) × English ×
Day Week Days	Sun Martue Wed Thu Fri Sat
Time 5 : 00 PM ~	(UTC-06:00) Central Time (US & Canada) 🗡

The next thing you need to configure is when the report will be run. The **Days** pull-down has three options.

- Week Days Whatever days are selected in the individual day checkboxes
- Day of Month A specific day of the month selected from an accompanying pull-down
- Last Day of Month The last day of each month

Creating s	cheduled report: Tools Issued
Description En	d of Shift Issued Tools Report
Destination O Employee   Group	Supervisors ~
Format Pdf v English (United States)	2 Language ) V English V
Days Week Days	Sun Mon Tue Wed Thu Fri Sat
Time 5 : 00	UTC-06:00) Central Time (US & Canada) 🎽



Now we have the days the report should be run set but we still need to add the time on those days that it will be run. Set your time with the **Time** box. Don't forget to also set the AM/PM value in the pull-down menu. And lastly, select your time zone from the time zone pull-down menu.

Creating so	cheduled report: Tools Issued
Description En	d of Shift Issued Tools Report
Destination O Employee       Group	Supervisors ~
Attachment         Date/Time           Format         Pdf ~         English (United States)	Language
Days Week Days	Sun Mon Tue Wed Thu Fri Sat
Time 5 : 00 PM ~ (1	UTC-06:00) Central Time (US & Canada) 🎽
TT	<b>M</b>

Once everything is set properly, click the blue **Save** button to schedule your report, then click the **OK** button.

Successfully scheduled report									
	ОК								

This has created a scheduled report "Subscription" for the Supervisors group. To verify that this is the case, you can go to the **Groups** tab and select the **Supervisors** group. Then click on the **Subscriptions** sub-tab.





You can see your scheduled report listed in the **Scheduled Reports** section.

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STATER	$\overline{n}$	Top Level			Change	Current Locat	ion	iperUser		Click to logo
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A C Team ATC Team Supervisors Team Chopper	Info Profiles Notifications - © Source Lo	Members Su	bscriptions	Attachr	I All Statuses	Email Alerts	⊙ Email Eve	nts Text All Statuses	Text Alerts	Text Events
	Scheduled Repo	orts ———								
	🕑 Title 🕑	Description	⊙ <b>т</b>	ime		(	<ul> <li>Format</li> </ul>	Source Location	<ul> <li>Employee</li> </ul>	🕑 Group
	Tools Issued En	d of Shift Issued Tools	Report Mon T	ue Wed Thu F	ri 5:00 PM Central	Standard Time P	df, English en-US	Top Level		Supervisors
Show Deleted Items										

If you would like to delete this subscription, select the report, and then click the **Delete** button.

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Son	Top Level Change Current Location	Click to logout
	Dashboard Locations Tools Tool States Employees Groups History Reports Settings	
Arc Team Supervisors Team Chopper	fo       Profiles       Members       Subscriptions       Attachments         Iotifications	t Events
Sc	cheduled Reports       Image: Control of Source Location     Image: Control of Source Location	Group
Show Deleted Items		

NOTE: For the employees to actually receive the scheduled report they must have an email address configured in their employee info and the system must be configured with an SMTP server as previously noted.



## Tool States Tab

Since the **Tool States** tab is powered by the reports engine, you can create custom reports and use them to customize your **Tool States** displays. Let's say you wanted to have the **Serial Number** field displayed on the **Tool Inventory** sub-tab of the **Tool States** tab. First you would create a custom report where you added the **Serial Number** field to that report and save it.





Then you would go to the **Tool States** tab and select the **Inventory** sub-tab. In the **Filtering** area at the top of the screen you would use the **Custom Reports** pull-down menu to select your newly created report, and you will have the serial number column added to the screen.

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STIF	The	Top Level	Change Curren	t Location	SuperUs	er			Click to	logout
	<u>ت می</u>	Dashboard Locations Tools Tool S	States Empl	loyees Gro	ups Hist	ory R	eports Settin	igs		
atus Issued Invento	ry Maintenance	In Process								
Show: Trained Drawer Ima	ge									
iltering ———									a Lo	
Custom Reports	Total Quantity	▼] .ber S						Sector S	efresh XI	sx ř
Storage Location Name	Part Number	Description	Drawer	r Tool ID Tot	al Quantity	🕑 Unit	s			
bl Box 1	1410 NO KEY	Sioux 1410 Drill	7	102260 1			^			
l Box 1	1AM1541	Sioux 45 Degree Angle Air Drill,		102261 1						
Box 1	1DA221HP NO WRENCHES	Sioux 1DA221HP Die Grinder	7	102259 1						
N Box 1	47ACP	Pilers, Angle Nose Pliers, Combination Slip-Joint, Industrial Finish, Vinyl Grips, 7 1/2"	· /	102278 1			-			
Box 1	47ACP	Pliers, Combination Slip-Joint, Industrial Finish, Vinyl Grips, 7 1/2"		102227 1			7			
I Box 1	87CF 87CF	Cutters, Diagonal, Vinyl Grips, 7 3/8" Cutters, Diagonal, Vinyl Grips, 7 3/8"		102167 1			-			
I Box 1	91ACP	Pliers, Adjustable Joint, Interlocking Channel, Industrial Finish, 9 1/4"		102187 1						
bi Box 1 bi Box 1	91ACP 96CF	Pliers, Adjustable Joint, Interlocking Channel, Industrial Finish, 9 1/4" Pliers, Long Needle Nose, Vinyl Grips, 8"		102246 1			-			
ol Box 1	96CF	Pliers, Long Needle Nose, Vinyl Grips, 8"		102225 1			1			
Box 1	97CCP	Pliers, Needle Nose, Vinyl Grips, 8" Pliers, Needle Nose, Vinyl Grips, 8"		102165 1			-			
bl Box 1	A2A	Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16"	1	102412 1						
ol Box 1	AC5B	Brush, Hand Scratch, Stainless Steel, 7 7/8"		102174 1			-			
ol Box 1	AC38 AT380	Impact Wrench, Air, Heavy Duty, 3/8" Drive (35-150 ft. lb.)		102258 1			-			
ol Box 1	AW1015DHK	Set, Wrench, L-Shape, Hex (15 pcs. In BHK15 Metal Index) (.028" to 3/8")	7	102274 1			-			
of Box 1	B58HLP	set, metric, wrencn, L-Shape, Hex, Long (11 pcs. in BHK11 Metal Index) (2 to Pliers, Linemans, Blue-Point, 8"	12 mm) 7	102275 1 102148 1			-			
ol Box 1	B58HLP	Pliers, Linemans, Blue-Point, 8"		102207 1			1			
ol Box 1	BADJC10 BADJC6	Wrench, Adjustable, Composite Handle, Blue-Point®, 10" Wrench, Adjustable, Composite Handle, Blue-Point®, 6"	5	102257 1						
ol Box 1	BADJC8	Wrench, Adjustable, Composite Handle, Blue-Point®, 8"	5	102311 1						
ol Box 1	BP16B BTC10	Hammer, Ball Peen, 16 oz. Cleaner, Side Terminal	7	102270 1			-			
ol Box 1	BTC3A	Brush, Terminal	7	102279 1						
ol Box 1	CSA8C	Carbon Scraper, Rigid, Black, 7/8" Blade Width, 7 5/8"		102194 1			-			
POTE	JE.		chunge cu	Trent Location		_	Y Y			ick to togo
tatus Issued Invent	ory Maintenance	Dashboard   Locations   Tools   Tools	ol States	mployees	Groups	History	Reports	Settings		
Show: Trained Drawer Im	age									
iltering										
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Storage Location Name	Part Number	Description	$\odot$	Serial Numb	er Drawer	Tool ID	Total Quantity	Units		
ol Box 1	1410 NO KEY	Sioux 1410 Drill				102260	1		~	
ol Box 1	1650	Prybar, 16"			7	102272	1			
bl Box 1	1DA221HP NO WRENCHE	S Sioux 45 Degree Angle Air Drill, S Sioux 1DA221HP Die Grinder				102259	1			
ol Box 1	208CCP	Pliers, Angle Nose			7	102278	1			
ol Box 1 ol Box 1	47ACP 47ACP	Pliers, Combination Slip-Joint, Industrial Finish, Vinyl Grips, 7 1/2" Pliers, Combination Slip-Joint, Industrial Finish, Vinyl Grips, 7 1/2"				102168	1			
bl Box 1	87CF	Cutters, Diagonal, Vinyl Grips, 7 3/8"				102167	1			
ol Box 1	87CF	Cutters, Diagonal, Vinyl Grips, 7 3/8" Plierr, Adjustable Joint, Interlocking Channel, Industrial Einish, 9 1/4"			_	102226	1			
ol Box 1	91ACP	Pliers, Adjustable Joint, Interlocking Channel, Industrial Finish, 9 1/4				102246	1			
ol Box 1	96CF	Pliers, Long Needle Nose, Vinyl Grips, 8"				102166	1			
ol Box 1	97CCP	Pliers, Needle Nose, Vinyl Grips, 8"				102165	1			
Box 1	97CCP	Pliers, Needle Nose, Vinyl Grips, 8"				102224	1			
ol Box 1	AZA ACSB	Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16" Brush, Hand Scratch, Stainless Steel, 7 7/8"			1	102412	1			
ol Box 1	AC5B	Brush, Hand Scratch, Stainless Steel, 7 7/8"				102233	1			
ol Box 1 ol Box 1	AT380 AW1015DHK	Impact Wrench, Air, Heavy Duty, 3/8" Drive (35-150 ft. lb.) Set. Wrench, L-Shape, Hex (15 pcs, in BHK15 Metal index) ( 028" to 3/8")			7	102258	1			
ol Box 1	AWM110DHK	Set, Metric, Wrench, L-Shape, Hex, Long (11 pcs. in BHK11 Metal Index) (	(2 to 12 mm)		7	102275	1			
ol Box 1	B58HLP	Pliers, Linemans, Blue-Point, 8"				102148	1			
ol Box 1	BADJC10	Wrench, Adjustable, Composite Handle, Blue-Point®, 10"				102257	1			
ol Box 1	BADJC6	Wrench, Adjustable, Composite Handle, Blue-Point®, 6"			5	102312	1			
of Box 1 of Box 1	BADJC8 BP16B	Wrench, Adjustable, Composite Handle, Blue-Point®, 8" Hammer, Ball Peen, 16 oz.			5	102311 102270	1			
ol Box 1	BTC10	Cleaner, Side Terminal			7	102276	1			
ol Box 1	BTC3A CSA8C	Brush, Terminal Carbon Scraner, Biold, Black, 7/8" Blade Width, 7,5/8"			7	102279	1			
pol Box 1	CSA8C	Carbon Scraper, Rigid, Black, 7/8" Blade Width, 7 5/8"				102253	1		~	

NOTE: Certain report types support viewing of additional image information. For example, when a tool from an optical toolbox is selected in the Tool Inventory report, the drawer image captured during the training process can be displayed by clicking the Show: Trained Drawer Image button.



#### Reports and the History Tab

In the past there have been many requests to be able to customize the display of the events on the history tab. Software version 9.11.4.x and higher will support custom report functionality on the Administration Client history tab as described below, which will allow such customization.

The new **History** tab will be powered by the reporting engine allowing customization of the eventlog display grid. The first step is to go to your **Reports** tab and create a custom **Event History** report. Then go to the new **History** tab. You will notice in the **Filtering** section of the screen that there is a **Custom Reports** pull-down menu. From this you can select your custom **Event History** report, and your event history display will change to your desired layout.

· Hide: Archive Image	Drawer Op	Top Level           Top Level           Dashboard         Locations         Tools         1	Char fool State	ege Current Loca	tion s Groups	uperUser History	Reports Setting	Click to logout
→ Hide: Archive Image	Drawer Op	Dashboard Locations Tools 1	fool State	s Employees	Groups	History	Reports Setting	35
Hide: Archive Image	Drawer Op	-				here .		
	Drawer Op	E COLORA				✓ Highlig	ht: SimulatorToolbo	x36 / Toolbox Simulator 36
		pen Image			D	rawer Close	d Image 📕	
rFiltering ────	ge not associated	d with the selected event			Image not a	associated w	with the selected eve	nt
Custom Reports	Event Time	1 Days 0 Hours 0 Minutes X	Drawe	r V				Auto-Refresh
Event Time	d Event History 10	R429 Pription	Tool ID		Affected	Employee	Source Location	Destination Location
9/15/2024 1:01:38 AM Status Set	imulatorToolbox36	Toolbox Simulator 36	102458			2	916,001	
9/15/2024 1:01:35 AM Box Shutdown						2	91BJ001	
and a second s	W1015DHK	Set, Wrench, L-Shape, Hex (15 pcs. in BHK15 Metal Index) (.028" to 3/8"	225427			2	918,001	S
9/14/2024 12:00:00 AM Status Set		has not done bit when the state of the state of the bit of	225227			2	9183001	
9/14/2024 12:00:00 AM Status Set 9/14/2024 12:00:00 AM Status Set	DEX14B	wrench, Compination, Standard Length, 7/16", 12-Point						
9/14/2024 12:00:00 AM Status Set 9/14/2024 12:00:00 AM Status Set 9/13/2024 4:15:32 PM Status Cleared	DEX14B EmulatorToolbox36	Toolbox Simulator 36	102458			2	918,001	
9/14/2024 12:00:00 AM Status Set 9/14/2024 12:00:00 AM Status Set 9/13/2024 4:15:32 PM Status Cleared 9/13/2024 4:15:31 PM Box Startup	DEX14B EmulatorToolbox36	Verence, completion, standard Length, 7/16", 12-Point Teolbox Simulator 36	102458			2	918J001 918J001	
9/14/2024 12:00:00 AM Status Set 9/14/2024 12:00:00 AM Status Set 9/13/2024 4:15:32 PM Box Status Cleared 9/13/2024 4:15:31 PM Box Startup 9/13/2024 3:53:46 PM Status Set	DEX14B EmulatorToolbox36 .SATCPORTAL	wrench, Lomoination, standard Length, 7/16°, 12-Point Teolbox Simulator 36 RFID Portal Emulator	102458 225767			2	918J001 918J001 98AT001	
9/14/2024 12:00:00 AM Status Set 9/14/2024 12:00:00 AM Status Set 9/13/2024 12:00:00 AM Status Cleared 9/13/2024 4:15:31 PM Box Startup 9/13/2024 3:53:46 PM Status Set 9/13/2024 3:53:46 PM Status Set	DEX148 SimulatorToolbox36 SATCPORTAL SATCPORTAL	virrenta, comoinston, stanoaro Length, 7/16°, 12-Point Toolbox Simulater 36 RFID Portal Emulator RFID Portal Emulator	102458 225767 225864			2	918J001 918J001 98AT001 A36T001	
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9/14/2024 12:00:00 AM Status Set 9/13/2024 4:00:00 AM Status Set 9/13/2024 4:15:32 PM Status Cleared 9/13/2024 4:15:31 PM Bost Statup 9/13/2024 3:53:46 PM Status Set 9/13/2024 3:53:46 PM Status Set 9/13/2024 3:53:46 PM Status Set 9/13/2024 3:53:46 PM Status Set 9/13/2024 3:53:46 PM Status Set	DEX148 EmulatorToolbox36 SATCPORTAL SATCPORTAL SAX36xxx EmulatorRFIDCab EmulatorRFIDCab	rereno, composeno, sunare Length, 7/18, 12-Point Toblos Elimulator BID Portal Emulator BID Portal Emulator BID Oblins Simulator BID Cables Simulator	102458 225767 225864 100125 225459 225777			2 2 2 1 1 2 2 2 2	918J001 918J001 986AT001 488T001 001 Box 1 936S001 93AU001	

Notice the **Serial Number** column has been added, and the **Work Order** field has been removed based on the custom report we created earlier. Additionally, the displayed data is filtered by the serial number "1DR429" and the previous 30-day date range. Also note that the shared version was available for selection too.

45 Snap-on L5 Connect Admin	Client, v.9.11.3.0903	11	Top Level	Ch	ange Current Locatio	n SuperUser		– a ×
Hide: Archive Imag	le D	rawer Open Image	Dashboard Locations	Tools   Tool Sta	tes Employees	Groups History Rep ☑ Highlight: FAM11E / So Drawer Closed Ima	oorts Settings ocket Driver, Metric, He ige	x, Standard, 11 mm
	lmage not a	ssociated with the	selected event			Image not associated with t	he selected event	
Filtering v Custom Repo	Event History 1	DR429 🕿 🗸 🗙	Event Time - 30 D	ays 0 Hours	0 Minutes 🗙	Drawer		Nuto-Refresh
Event Time	Action	Part Number	Description	Serial Number	Tool ID 📀 Empl	oyee 🕑 Affected Employee	e 🕑 Source Location	<ul> <li>Destination Locat</li> </ul>
9/9/2024 1:36:07 PM Sta	tus Set	FAM11E	Socket Driver, Metric, Hex, Standard, 11 mm	1DR429	225173 Superoser		Z918J001	



#### Dashboard Setup

The dashboard is the home screen of the admin client. It provides a customizable, real-time display of your L5 Connect system. data of all your L5 Connect<sup>™</sup> Device's statuses and alerts. The True-Crib and ATC Portal also have dashboards as well. This document will discuss how to customize your dashboards to suit your business needs.

### Widgets

The building blocks of the dashboard are widgets. Widgets are pre-made self-contained panes that show different aspects of the L5 Connect system such as device status, or a graph of the top employees with tools out.

By default, the Dashboard displays seven widgets:

- 1. System Status Displays the total number of objects in the system and the total in the current view.
- 2. Device Status Displays all L5 Connect<sup>™</sup> Devices in the current view and their status.
- 3. Work Location Status Displays all Work Locations in the current view and their status.
- 4. Top Employees with Issued Tools Displays the Employees with the most issued tools.
- 5. Top Work Locations with Issued Tools Displays the Work Locations with the most issued tools.
- 6. Top Devices with Issued Tools Displays the L5 Connect<sup>™</sup> Devices with the most tools issued.
- 7. Recent Events Displays a list of events since the user logged into the client.



## Dashboard Editor

The dashboard editor provides a way to customize your dashboard. You can change which widgets are displayed and where they are on the screen. You cannot edit the widgets themselves, however.

To access Dashboard Editor, you need to go to **Settings** tab and expand the **System Configuration** item. Then select the **Dashboard** sub-item.



You will have the option to create a personal custom dashboard or a global custom dashboard. As noted on the screen, personal customizations take priority over global customizations. The process for creating the custom dashboard is the same for either type.

**NOTE:** To create a global custom dashboard, you will need an admin login with the **Organizational Location Edit** permission.



45 Snap-on L5 Connect Admin Client, v:9.11.3.0903										- a ×
STATEM	$\overline{n}$	Top Level			Change	Current Location	s 🍃 s	uperUser		Click to logout
		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports Settings	
Q =>	Dashboard: Custo	om								
About  Network Setup  System Configuration	Personal 🖉 🗙 Global 🖉 🗙									
Dashboard Device Global Settings Issued Tool Past Due			Per	sonal cus	tomizations to	ake priority over	global cu	istomizatio	ns.	
Profile Granting Profile Permissions Tool Display Formatting										
User Defined Fields     Diagnostics     Local Settings										

Click the **Change** button, which looks like a pencil, for the **Personal** dashboard. You are taken to an editable version of the dashboard. The dashboard controls are located in the top left corner of the screen.

- Add a Widget (green plus) This allows you to pick from the Widget library and add one to the screen.
- Save Current Layout (blue disk) saves current layout and exits the editor.
- Cancel Changes (red slash) discards change and exits the editor.
- **Current Layout** displays the current mode you are editing.

45 Snap-on L5 Connect Admin Client, v:9.11.3.	0903																	-	0 ×
			<b></b>	Top Le	evel				Char	nge Current Loc	catio	on Su	uperUser					Click	to logout
E State	iting: P	ersonal	Custom	Dasl	board	i Loca	tions	Tools	Tool State	s Employe	es	Groups	History		Reports	Settings			
		X	Device Status	11		<mark>° 6</mark> 🗆 Ніа	ie OK Items	Alerts	:	X	ľ	/ork Locatio	n Status	Į	1 🗆 Hide (	DK Items		Alerts:	X
			Name	Alerts	Issued	Issued Users	Mngd Out	Alert		Location		Name	Alerts	ssued	Issued Users	Issued Devices	Mngd Out	Alert	
System Status	Filtered	Total	Tool Box 1	5	3	3	0	Offlin	e	Tool Crib East		Work Loc2	0	1	1	1	0	Mainte	mance Overd
Devices Online :	0	0	Z91BJ001	3	0	0	0	Maint	enance Overdue	Tool Crib East		Work Location 1	0	0	0	0	0		
Devices Offline :	11	11	ZA8BT001	2	0	0	0	Maint	enance Overdue	Tool Crib East		Work Location o		0	0	0	0		
Tools Issued :	130	130	79847001	12	14	,		Maint	enance Overdue	Tool Crib East		Work Location 5		0	0		0		
Users with Tools	7	7	294B1001	÷	6	3		Maint	enance Overdue	Tool Crib East		Work Location S		0			0		
Devices with Tools Issued :	5	5	Z99L5001	2	1	1	0	Maint	enance Overdue	Tool Crib East		Work Location 6	0	0	0		0		
Tools Issued with Alerts :	3	3	Tool Crib West	1	111	1	0	In Tra	nsit	Tool Crib East	11	Work Location 7	0	0	0	0	0	1	
Managed Tools Out :	1	1	Z93AU001	1	1	1	0	Maint	enance Overdue	Tool Crib East	1	Work Location 8	0	0	0	0	0	1	
Tools Managed :	1578	1578	Z93GS001	1	0	0	0	Maint	enance Overdue	Tool Crib East		Work Location 1	0 0	0	0	0	0	1	
2			Z97AT001	1	0	0	0	Maint	enance Overdue	Tool Crib East		Work Location 1	3 0	0	0	0	0	]	
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		5	<					Maint	ananca Ouardua	Tool Celh Er	<								5
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Top Employees man issued root	<b>∼</b>  ≃	p mont E	ocutions with i	ssaca	$\mathbf{\nabla}$	i op bei	tees with	Tobaca	10013	Time Action	Part	t Number Empl	lovee Soun	e De	estination				<u>v</u>
Plane Maintenance Hangar, Preston	123 Iter	n assembly 9	9000		3	Tool Crib V	Vest		111				-,						
Fly. David C.	2 Fals	e Org			3	Tool Crib E	ast		14										
					-					-									
Lipsey, Matt J.	1 Wo	rk Loc2			1	Z94BJ001			6										
Poggers Fred	1					Tool Box 1			3										
								$ \rightarrow $		-1									
Chwan, Joe	1					Z99LS001	```		1										
l SuperUser	1					Z93AU001			1										
Runner, Rhode	1																		
L																			
	×.				**	1			5										5

Each widget in the Dashboard Editor has three controls to modify its Location on the screen:









Using these controls, you can add or remove widgets, resize widgets, and relocate widgets to get the screen like you want it. Besides the seven widgets that are on the default screen, there is also a custom report widget which allows you to add a widget with a custom report to the screen.



## True-Crib Dashboard

The True-Crib dashboard can be customized in the same manner as the admin dashboard. To customize the dashboard log into the crib as an attendant, and then click the **Main Menu** button, which looks like a gear.

45 Snap-on True-Crib, v:9.11.3.0903, Tool Crib East								- a ×
TRUE-C	RI	B					SuperUser	Click to logout
		SCAN E	MPLOYEE BADO	GE TO START				<b>**</b>
		Device Status ! 1 🥖	1 Hide OK Items	Alerts:		Issued Tools Work Location Status		Alerts:
Sustan Status	tored Tate	Name Alerts Issued	Issued Users Mngd Out	Alert	Location Te	Name Alerts Issued Issued Us	sers Issued Devices Mngd Out	Alert Locat
System Status Fu	<u>terea</u> 10ta	Tool Crib East 11 14	<b>5</b> 1	Maintenance Overdue	Tool Crib East C	Work Loc2 0 1 1	1 0	Maintenance Overdue Item
Devices Offline :	0 0			Maintenance Overdue	Tool Crib East C			
Tools Issued :	1 1/			In Transit	Tool Crib East D			
Users with Tools Issued :	5 5			Maintenance Overdue	Tool Crib East C			
Devices with Tools Issued :	1 1			Maintenance Overdue	Tool Crib East C			
Tools Issued with Alerts :	2 2			Maintenance Overdue	Tool Crib East C			
Managed Tools Out :	1 1			Maintenance Overdue	Tool Crib East C			
Tools Managed : 2	256 257			Maintenance Overdue	Tool Crib East C			
				Maintenance Overdue	Tool Crib East C			
				Maintenance Overdue	Tool Crib East C			
					>	<		>
Top Employees with Issued Tools	Top Work	Locations with Issued Too	Top Devices with	Issued Tools	Recent Even	nts		
Plane Maintenance Hangar, Preston	0 Item assemb	y 9000 3	Tool Crib East	14	Time Action	Part Number Employee Source Dest	lination	
Fly, David C.	1 False Org	- 1	Z94BJ001	3				
Rogers, Fred	1 Work Loc2	1						
Chwan, Joe	1							
Runner, Rhode	1							
L	1		1		l.			

Then click the **System Changes** button on the **Main Menu** window.

4 <b>5</b> Sn	ap-on True-Crib, v:9.11.3.0903, Tool Crib East			- 0 ×
1	TDIIE_CDID	) M	lain Menu	C Attendant
Sys	Inventory	Device Status	VT Settings	System Changes
U Dev To	Troubleshooting	About		Ť
Top Planu Fly, I Roge Chwa				



Then click the **Change: Dashboard** button.

-3 shap	p-on moe-cho, v.s. n.s.usos, noor cho cast	- 0 ^
7		Attendant
	System Changes	
	Change: Dashboard	
		Item
U: Dev To		
Top Plane Fly, D Roger Chwa		

Provide your admin User Name and Password to authenticate.





From this screen you can select a **Personal** or **Global** customization and then you will be at the dashboard editing screen just like with the admin dashboard.

45 Sna	p-on True-Crib, v:9.11.3.0903, Tool Crib East			- 0	$\times$
7	DIIE_CDID		Attendant		
		Editing 😣			
		Dashboard: Custom			
Sysi	Change: Dashboard	Personal 🖉 🗙 Global 🖉 🗙			Local
		Personal customizations take priority over global customizations.			
Dev					
Тс					
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15 Snap-on True-Crib, v:9.11.3.0903, Tool Crib East						- o ×
TRIIF_CRI	R				<u>_</u>	Attendant SuperUser
THUL CIT					2	
Editing: Person	al Custom	SCAN EMPL	OYEE BADGE TO	O START		
(	🔇 Device Status 归 🏑	1 🗆 Hide OK Items	Alerts:	X	Issued Tools Work Location Status	Alerts:
	Name Alerts Issued	Issued Users Mngd Out	Alert	Location Te	Name Alerts Issued Issued Users Issued	ed Devices Mngd Out Alert Local
System Status <u>Filtered</u> Iot	Tool Crib East 11 14	5 1	Maintenance Overdue	Tool Crib East C	Work Loc2 0 1 1	1 0 Maintenance Overdue Item
Devices Online : 1			Maintenance Overdue	Tool Crib East C		
Tools Issued : 14 1/			In Transit	Tool Crib East C		
Users with Tools (1) ed : 5 5	*		Maintenance Overdue	Tool Crib East C		
Devices with Tools Issued : 1 1			Maintenance Overdue	Tool Crib East C		
Tools Issued with Alerts: 2 2			Maintenance Overdue	Tool Crib East C		
Managed Tools Out: 1 1			Maintenance Overdue	Tool Crib East C		
Tools Managed : 256 25	7		Maintenance Overdue	Tool Crib East C		
			Maintenance Overdue	Tool Crib East C		
	x.			×		
		<u> Т                                   </u>		Ύα i a		
Top Employees with Issued Tools X Top Work	k Locations with Issued 🗙	Top Devices with	Issued Tools	Recent Even	ts Prot Number Frankrus Course Destination	X
Plane Maintenance Hangar, Preston 10 Item assemb	bly 9000 3	Tool Crib East	14	Time Action	Part Number Employee Source Destination	
Fly, David C. 1 False Org	1	Z94BJ001	3			
Rogers, Fred 1 Work Loc2	1					
Chwan, Joe 1						
Runner, Rhode 1						
		1				
		1				
		1				
N.	5		N			×.



### ATC Portal Dashboard

The portal dashboard can also be customized in the same manner as the admin dashboard. To customize the portal dashboard, make sure nobody is logged into the portal and click the **Main Menu** button, which looks like a gear.

नितन्त्र	Z98BT001 Portal
Part Number Details	
Top Employees with Issued Tools	Perent Events
Top Employees with Issued 1001s	Time Action Part Number Employee Source Destination



Then click the **System Changes** button on the **Main Menu** window.





Then click the **Change: Dashboard** button.





You will then be prompted to scan your badge for access.





After scanning your badge, you will be prompted to input your admin credentials to authenticate.

Please ente	r your username and password
User Name	superuser
Password	
Ca	ancel Login

Now you will be prompted to select the type of custom dashboard you wish to create. There is only a global dashboard option, however, since the dashboard is only displayed when no user is logged into the portal. Click the **Change** button, which looks like a pencil.

	Editing	
Dashboard: Custom		_
Global	s take priority over alobal cus	tomizations.
-	. , ,	



You are now back to the editable dashboard, just as before on the admin and tool crib applications. You can customize and save the dashboard as you would like it to be displayed when no users are logged into the portal.

	A DECEMBER OF A	
	Editing: Global Custom	<u>O</u>
All Users		🖄 Me 🙀
Part Number Details		
		<u>×</u>
Top Employees with Issued Too	Recent Events	
	Time Action Part Number Employee Sou	rce Destination
	l	1



#### Attachments

Sometimes you may have documents or links that it would be helpful to attach to a tool or employee in the L5 Connect<sup>™</sup> system. For example, you might wish to attach an instruction manual document or a record of calibration to a specific tool. Or perhaps you would like to keep a record of a link to a course certification for employees to perform specialized maintenance. You can easily do this with the L5 Connect admin application.

When you save an attachment in the L5 Connect<sup>™</sup> system, the attachment will be stored by the service in its defined file server location. Then, when someone wants to retrieve the attachment for viewing, it will be downloaded to whatever admin application instance they are running.

NOTE: The maximum file size of attachments is 4MB.



### Adding an Attachment to a Location

In the admin application, go to the **Locations** tab and select the location to which you would like to add the attachment. Then select the **Attachments** sub-tab.





## Adding an Attachment to a Master Tool

In the admin application, go to the **Tools** tab and select the master tool to which you would like to add the attachment. Then select the **Attachments** sub-tab.





## Adding an Attachment to a Tool Instance

In the admin application, go to the **Tools** tab and select the master tool to which you would like to add the attachment.

45 Snap-on L5 Connect Admin Client, v:9.12.3.1029										- o ×
A DETO		Top Level		Change	Current Locatio	n 🏂	SuperUser			Click to logout
BIEL		Dashboard	Locations T	ools Tool States	Employees	Groups	History	Reports	Settings	
Q X	QD2R	100 Wrench, Adi, Cli	ick-type. U.S., Fixe	ed-Ratchet. 20-100 ft.	lb., 3/8" drive					
PPC203A	3									
PPC205A	Info Instances	Maintenance	Contained In	Quantity Monito	ring Attachn	nents 🛛 (	Optical Toolb	ox		
PPC206A	Part Number Q	02R100				Photo				
PPC4A PPC812R	To	rque Wrench, Ad	lj. Click-type, U.S.,	Fixed-Ratchet, 20-10	) ft. lb., 3/8"					
PPC816B	Description	ive	, ,, ,, ,							
PPC820B	Issue Behavior D	urable			~					
PT1800AL	(									
PT5C	Units									
PWC52A	Tag M	IT100014	×A							
PWC6										
PWCS7	Verifications									
QD2R100	Vermeations		$\neg \neg$							
QD2R1000	Issued Is	ssued Verification	n 🖉 🗙							
QD3R250										
QD3RM30	Return	<u> </u>								
R1214C										
R1618C	Optical Toolbox									
R2022C	Default Tolerance	0 ×								
R2420C	L									
R010C										
RB71618										
RR72022										
Show Deleted Items										

Select the **Instances** sub-tab. Then double click the tool instance to which you would like to add the attachment.

45 Snap-on L5 Connect Admin Client, v:9.12.3.1029									– ø ×
Staten		Top Level			Change Current Lo	cation	erUser		Click to logout
		Dashboard	d Locations	Tools Tool	States Employe	es Groups H	listor	y Reports Settings	
<i>с</i> х	S 002	100							
Part Number ~	Torqu	e Wrench. Adj	Click-type, U.S.,	Fixed-Ratchet, 20	-100 ft. lb., 3/8" driv	/e			
PPC203A	2								
PPC205A			( and the						
PPC206A	Info Instances	Maintenan	ce Contained	In Quantity	Monitoring Att	achments   Optio	cal lo	olbox	
PPC4A	Show Deleted	i Items							
PPC812B				0	0			0	0
PPC816B	(*) Home L	ocation 🕑 /	Additional Info	(v) User Label 2	Serial Numbe	r 🕑 Customer ID	Qty	Sissued	(v) Work
PPC820B	Tool Crib East					Torque!	1	Smith, John J. 10/16/2024 3:14 PM	Item assem
PT1800AL	Tool Crib East								
PT5C	Tool Crib East						1		
PWC52A	Tool Crib East						1		
PWC6	Tool Crib East						1		
PWCS7	Z91BJ001						1		
QD2R100	Z988T001						1	SuperUser 10/15/2024 10:02 AM	
QD2R1000	Z98BT001						1		
QD3R250	< c								>
QD3RM30									
R1214C									
R1618C									
R2022C									
R2428C									
R010C									
ND21214									
RD72022									
Show Deleted Items									



This will bring up the tool details window. Select the **Attachments** sub-tab.

Editing QD2R100	3
QD2R100 Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive	
Info Issued Status Maintenance Attachments	
⊘ Name       ⊙ Description       ⊙ Filename/Link       Date Added       ⊙ Uploaded By	



## Adding an Attachment to an Employee

In the admin application, go to the **Employees** tab and select the employee to which you would like to add the attachment. Then select the **Attachments** sub-tab.





## Adding an Attachment to a Group

In the admin application, go to the **Groups** tab and select the group to which you would like to add the attachment. Then select the **Attachments** sub-tab.





#### Adding the Attachment

There are two types of attachments that can be added, files and hyperlinks.

#### Attaching a File

To attach a document, click the Add File button.

	)			
<b>Name</b>	<ul> <li>Description</li> </ul>	᠃ Filename/Link	Date Added	<ul> <li>✓ Uploaded By</li> </ul>

This will open a file dialog window asking you to select the file that you wish to attach. Navigate to the proper directory and select the file you wish to upload. Then click the **Open** button.

Select: Attachment						>
$\vdash$ $\rightarrow$ $\checkmark$ $\uparrow$ ] $\blacktriangleright$ This	PC > Documents > Attachments			V 🖸 Sea	rch Attachments	م
Organize 🔹 New folder						- 🔳 🕐
Debug ^	Name	Status	Date modified	Туре	Size	
Log	AttachmentFile.txt	Ç	11/1/2023 4:03 PM	Text Document	1 KB	
String Translation						
s This PC						
Organize • New folder     I Debug   I Log   I Log   String Translation   This PC   3 D Objects   Desktop   Downloads   Music   Pictures   Videos   Windows (C:)   engineering (\\cookset)   AttC_SHARE (\\kstate)						
<ul> <li>This PC</li> <li>3D Objects</li> <li>Desktop</li> <li>Documents</li> <li>Downloads</li> <li>Music</li> <li>Pictures</li> </ul>						
Documents						
Downloads						
J Music						
Pictures						
Videos						
Organize • New folder     Debug   Log   String Translation   This PC   3D Objects   Desktop   Documents   Downloads   Music   Pictures   Videos   Windows (C)   Regineering (\coo   AttachmentFile.txt     File name:     AttachmentFile.txt     AttachmentFile.txt     All Files(**)     Open						
AIC_SHARE (\\Ke						
-						
File nam	e: AttachmentFile.txt				Files(*.*)	~
					Open	Cancel
				-		


You will then have the opportunity to add a **Description** of the file. Add a short informative description and then click the green **OK** button.

	Editing: Attachment				
Name	AttachmentFile				
Description	Maintenance Procedures				

You have now created a file attachment.

Name       Description       Filename/Link       Date Added       Uploaded By         AttachmentFile       Maintenance Procedures       AttachmentFile.txt       11/5/2024 11:09:47 AM       SuperUser       X						
AttachmentFile         Maintenance Procedures         AttachmentFile.txt         11/5/2024 11:09:47 AM         SuperUser         X		✓ Name	<ul> <li>Description</li> </ul>	<ul> <li>✓ Filename/Link</li> </ul>	Date Added	✓ Uploaded By
	₽	AttachmentFile	Maintenance Procedures	AttachmentFile.txt	11/5/2024 11:09:47 AM	SuperUser X

To view the attachment, you would click the **Save** button at the beginning of the attachment line. This will open a file dialog asking you to provide a location to save the file. Select the directory in which you wish to save the file, and then click the **Save** button to download it.

#### Attaching a Hyperlink

You can also attach a hyperlink with a valid URI format. Common examples are an https: based web page, a file: server and path file definition, or a mailto: electronic mail address.

To attach a hyperlink, click the **Add Link** button.

	✓ Name	$\odot$ Description	✓ Filename/Link	Date Added	🕑 Uploaded By	
€	AttachmentFile	Maintenance Procedures	AttachmentFile.txt	11/5/2024 11:09:47 AM	SuperUser	X



You will now be prompted to provide a **Name**, **Description**, and **Link URL** value for the attachment. Add this information and then click the green **OK** button.

	Editing: Attachment
Name	Sample Link
Description	Sample hyperlink
Link URL	https:\\www.google.com

You have now created a hyperlink attachment.

🕑 Name	<ul> <li>Description</li> </ul>	✓ Filename/Link	Date Added	<ul> <li>✓ Uploaded By</li> </ul>	
Sample Link	Sample hyperlink	https://www.google.com/	11/5/2024 1:20:55 PM	SuperUser	
AttachmentFile	Maintenance Procedures	AttachmentFile.txt	11/5/2024 11:28:02 AM	SuperUser	X

You can open the hyperlink attachment by simply clicking the **Open** button at the beginning of the attachment line. This will open the link in your default web browser.

### **Deleting an Attachment**

To delete an attachment, click the attachment to select it. Then click the **Delete** button at the end of the attachment line.

	✓ Name	<ul> <li>Description</li> </ul>	✓ Filename/Link	Date Added	<ul> <li>✓ Uploaded By</li> </ul>
Ø	Sample Link	Sample hyperlink	https://www.google.com/	11/5/2024 1:20:55 PM	SuperUser
Ŧ	AttachmentFile	Maintenance Procedures	AttachmentFile.txt	11/5/2024 11:28:02 AM	SuperUser X



### **Importing Attachments**

To make adding many attachments easier, the L5 Connect system supports the ability to import attachment links for master tools, tools (a.k.a. tool instances), and employees. You can import multiple of these types of attachments in the same import file if desired.

NOTE: The only attachment types supported for import are links. Attachment file imports are not currently supported.

#### Creating Your Import Spreadsheet

The first step is to create an Excel spreadsheet with your data in the proper format for import.

The easiest way to start creating your spreadsheet is by running a custom report to get the object ID (Tool ID, Master Tool ID, or Employee ID), and perhaps an identifier like part number or employee name and any other field that might be helpful in building your spreadsheet. Once you have your report created you will run that and then export it as a spreadsheet. Then you can edit that spreadsheet to add the other fields required by the importer. For more information on how to run a report see the L5 Connect<sup>™</sup> Reports document

Once you have created your spreadsheet, you will need to add pertinent information about your attachments so that the import engine will be able to successfully import them. Here are the fields that the attachment importer will be looking for in your import spreadsheet.

**Object ID** - This is the unique identifier for the object to which the attachment will be added. For tools this would have to be Tool ID. For Master tools it would be the master tool ID. For employees it would be the employee ID. **Object Type** - This tells the importer which of the three types available for attachments is being targeted. For tool instances this would be "Tool", for master tools it would be "MasterTool", and for employees it would be "Employee". **Name** - This is the name for the attachment link.

Description - This is a description of what the attachment link is.

Link URL - This is the URL of the link.

NOTE: The Name and Description fields are optional. NOTE: The Object Type field will default to match the import launch point if not included in the spreadsheet.



#### Launching the Import Process

NOTE: Even though the Import process is launched from the selection of a single Master Tool, Tool Instance, or Employee, attachment links for many objects can be included in the same import spreadsheet.

#### Master Tool Attachments

To import master tool attachments, go to the tools tab, select any master tool, and then click the **Attachments** subtab. Finally, click the **Import** button to start the attachment import process.



Proceed to the Importing the Attachment Spreadsheet section to continue.



#### Tool Instance Attachments

To import tool instance attachments, go to the **Tool States** tab, select the **Inventory** sub-tab, double click one of the tool instances.

-									
5 Snap-on L5 Connect Admin Client, v.S	9.13.1.0123							-	
		Top Level			SuperUs	ser			
		Chang	e Current	Location	<b>1</b>			c	ick to logou
			e current	Locution					ica to togot
4		Dashboard   Locations   Tools   Tool States	Emple	ovees	Groups   Hist	orv Rep	orts Set	tings	
Status Issued Invent	ory Maintenance	In Process							
Show: Trained Drawer	ade								
r Filtering 🗕 💻									
Custom Reports	Total Quantity	<b>(*)</b>						Auto-Refresh	Xlsx
Storage Location Name	e 🕑 Part Number	Description	Drawer	Tool ID	Total Quantity	✓ Units			
Tool Box 1	1410 NO KEY	Sioux 1410 Drill		102260	1				
Tool Box 1	1650	Prybar, 16"	7	102272	1		1		
Tool Box 1	1AM1541	Sioux 45 Degree Angle Air Drill,		102261	1				
Tool Box 1	1DA221HP NO WRENCH	ES Sioux 1DA221HP Die Grinder		102259	1				
Tool Box 1	208CCP	Pliers, Angle Nose	7	102278	1				
Tool Box 1	47ACP	Pliers, Combination Slip-Joint, Industrial Finish, Vinyl Grips, 7 1/2"		102168	1				
Tool Box 1	47ACP	Pliers, Combination Slip-Joint, Industrial Finish, Vinyl Grips, 7 1/2"		102227	1				
Tool Box 1	87CF	Cutters, Diagonal, Vinyl Grips, 7 3/8"		102167	1				
Tool Box 1	87CF	Cutters, Diagonal, Vinyl Grips, 7 3/8"		102226	1				
Tool Box 1	91ACP	Pliers, Adjustable Joint, Interlocking Channel, Industrial Finish, 9 1/4"		102187	1				
Tool Box 1	91ACP	Pliers, Adjustable Joint, Interlocking Channel, Industrial Finish, 9 1/4"		102246	1				
Tool Box 1	96CF	Pliers, Long Needle Nose, Vinyl Grips, 8"		102166	1				
Tool Box 1	96CF	Pliers, Long Needle Nose, Vinvi Grips, 8"		102225	1				
Tool Box 1	97CCP	Pliers, Needle Nose, Vinyl Grips, 8"		102165	1				
Tool Box 1	97CCP	Pliers, Needle Nose, Vinvl Grips, 8"		102224	1				
Tool Box 1	AZA	Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16"	1	102412	1				
Tool Box 1	AC5B	Brush, Hand Scratch, Stainless Steel, 7 7/8"		102174	1				
Tool Box 1	AC5B	Brush, Hand Scratch, Stainless Steel, 7 7/8"		102233	1				
Tool Box 1	AT380	Impact Wrench, Air, Heavy Duty, 3/8" Drive (35-150 ft. lb.)		102258	1				
Tool Box 1	AW1015DHK	Set, Wrench, L-Shape, Hex (15 pcs. In BHK15 Metal Index) (.028" to 3/8")	7	102274	1				
Tool Box 1	AWM110DHK	Set, Metric, Wrench, L-Shape, Hex, Long (11 pcs. in BHK11 Metal Index) (2 to 12 mm	7	102275	1				
Tool Box 1	B58HLP	Pliers, Linemans, Blue-Point, 8"		102148	1				
Tool Box 1	B58HLP	Pliers, Linemans, Blue-Point, 8"		102207	1				
Tool Box 1	BADJC10	Wrench, Adjustable, Composite Handle, Blue-Point®, 10"		102257	1				
Tool Box 1	BADJC6	Wrench, Adjustable, Composite Handle, Blue-Point®, 6"	5	102312	1				
Tool Box 1	BADJC8	Wrench, Adjustable, Composite Handle, Blue-Point®, 8"	5	102311	1				
Tool Box 1	BP16B	Hammer, Ball Peen, 16 oz.	7	102270	1				
Tool Box 1	BTC10	Cleaner, Side Terminal	7	102276	1				
Tool Box 1	BTC3A	Brush, Terminal	7	102279	1				
Tool Box 1	CSA8C	Carbon Scraper, Rigid, Black, 7/8" Blade Width, 7 5/8"		102194	1				
Tool Box 1	CSARC	Carbon Scraper Biold Black 7/8" Blade Width 7 5/8"		102253	1				

Then double click a tool instance in the list to open the tool details. Select the **Attachments** sub-tab and finally, click the **Import** button to begin the attachment import process.

Editing 235605	<b>3</b>
235605 Eppoxy Adhesive, 1.69 oz., Gray, Work Life: 3 min. Top Level/Maintenance/Tool Crib East	
Info Issued Status Attachments	
⊙ Name         ⊙ Description         ⊙ Filename/Link         Date Added         ⊙ Uploaded By	

Proceed to the Importing The Attachment Spreadsheet section to continue.



#### **Employee Attachments**

To import employee attachments, go to the **Employees** tab, select any employee, click the **Attachments** sub-tab, and click the **Import** button to begin the import attachments process.

45 Snap-on L5 Connect Admin Client, v:9.12.8.1219						- a ×
Some	Top Level		Change Current Location	n SuperUser		Click to logout
	Dashboard	Locations Tools	Tool States Employees	Groups History	Reports Settings	
Assembly Area A Line 0, Anne Assembly Area A Line 0, Anne Assembly Area A Line 0, Gene Assembly Area A Line 0, James Assembly Area A Line 1, Benca Assembly Area A Line 1, Benca Assembly Area A Line 1, Benca Assembly Area A Line 1, Chris Assembly Area A Line 2, Amy Assembly Area A Line 2, Amy Assembly Area A Line 2, Mike Assembly Area B Line 0, Dean Assembly Area B Line 0, Dean Assembly Area B Line 0, Dean Assembly Area B Line 0, Sara Assembly Area B Line 1, Jim Assembly Area B Line 1, Jim Assembly Area B Line 1, Jim Assembly Area B Line 1, Josa Assembly Area B Line 2, Art Assembly Area B Line 2, Art Assembly Area B Line 2, Kim Helicopter Maintenance Hangar, Da Helicopter Maintenance Hangar, Fer Show Deleted Items	Dashboard Assembly Area A Lin Profiles Memberships ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	Locations Tools	tachments	Groups History	Reports Settings	

Proceed to the Importing the Attachment Spreadsheet section to continue.



#### Importing The Attachment Spreadsheet

#### NOTE: The attachment spreadsheet import process will be the same for any of the different types of objects.

Once you have launched the import process (see appropriate section above), navigate to the spreadsheet file and click the **Open** button to initiate the import window. Here is an example of the import window with a spreadsheet for importing tool attachments loaded.

			Select H	leader Ro	w (Double-Clic	k) 🦳
<b>_</b>			Identify (	Column (D	Drop-Down Me	nu) 🗨
Tool ID	Part Number	Type	Name	Description	Link	·
~	~	v	~	~	~	
-						
Tool Inventory						
Filtered By: Location = Top Level						
Run Time: 14/01/2025 13:18 : Central Standard Time	2					
Nequested By: Kent, Noy						
TaoLID	Part Number	Type	Name	Description	Link	
100001	158x36xxx	Tool	15Av36vvv Filer	154x36xxx Description	file/\filecenver/Snanon\/54v36vvv	
100002	OEX20B	Tool	OEX20B Files	OEX208 Description	file/\filesenver/Snapon/OEX208	
100003	OEX18B	Tool	OEX188 Files	OEX188 Description	file:\\fileserver\Spapon\OEX188	
100003	OEX168	Tool	OEX168 Files	OEX168 Description	file/\filesenver(Snapon)OEX168	
100005	OEX10B	Tool	OEX100 Files	OEX148 Description	file/\fileserver(Snapon(OEX100	
100005	OEX12B	Tool	OEX148 Files	OEX128 Description	file/\filesenver/Snapon/OEX128	
100007	OEVM100R	Tool	OEYM1008 Filer	OEVM1008 Description	file/\filerenver\Spapor\OEVM100B	
100009	OEXM1100	Tool	OEXM1000 Files	OEXM1108 Description	file:\\filesenver\Snapon\OEXM110B	
100008	OEXM130R	Tool	OEXMITTOD Files	OEXM1208 Description	file/\filesenver(Snapon)OEXM110E	
100010	OEXM1308	Tool	OEXM120B Files	OEXM1208 Description	file:\\filesenver\Snapon\OEXM120B	
100010	OEXM1408	Tool	OEXM130B Files	OEXM1308 Description	file:\\fileserver\Snapon\OEXM130B	
100012	BYES20228	Tool	BYES2022B Eiler	RVES20228 Description	file:\\filesenver\Spapor\RVES2022B	
100012	PYES2426P	Tool	RVEC3436R Eiler	RVES24268 Description	file/1/filecenced Seaport PVES3436P	
100014	OEX248	Tool	OEX248 Files	OEX248 Description	file:\\filesenver\Snapon\/OEY248	
100015	OEX228	Tool	OEX228 Filer	OEX228 Description	file/\filerenger\Spapor\OEY228	
100015	OEX30B	Tool	OEX30B Files	OEX308 Description	file/\fileseneer/Spanor/OEX308	
100017	OEX28B	Tool	OEX288 Files	OEX288 Description	file/\\fileserver\Snapon\OEX288	
100018	OEX228	Tool	OEX228 Files	OEX228 Description	file/\filesenver\Spapon\OEX228	
100018	OEVM1908	Tool	OEYM1908 Eiler	OEVM1908 Description	file/\filesener/Spapor\OEYM190B	
100070	OEXM1808	Tool	OEXM1808 Files	OEXM1808 Description	file:\\fileserver\Snapon\OEXM180B	
100021	OEXM170B	Tool	OEXM1000 Files	OEXM1708 Description	file:\\fileserver\Snapon\OEXM170B	
100022	OEXM1608	Tool	OEXM160B Files	OEXM1608 Description	file/\filesenver\Spanon\OEYM160B	
100023	OEXM1508	Tool	OEXM150B Files	OEXM1508 Description	file:\\fileserver\Snapon\OEXM150B	
100024	FADH12A	Tool	FADH12A Files	FADH12A Description	file/\fileserver/Snapon/FADH12A	
100025	RXES16188	Tool	RXES1618B Files	RXES16188 Description	file/\fileserver/Spapon/BXES16188	
100026	RXES12148	Tool	RXES1214B Files	RXES12148 Description	file/\filesenver\Spapon/RXES1214B	
100027	PYESPIDE	Tool	BYESDING Filer	RXESR10B Description	file/\filerenver\Snappn/RYESR10R	
100028	OFX26B	Tool	OFX268 Files	OEX268 Description	file/\fileserver\Snapon\OFY268	
100029	SPRSRO	Tool	SPRSRO Files	SPRS80 Description	file/\fileserver/Spapon/SPRSRO	
100020	RADIC10	Tool	RADIC10 Eiler	RADIC10 Description	file/\filesener/Spaper/BADIC10	

The next step is to map the columns in the spreadsheet to the fields the importer needs. **Tool ID** would be the **Object ID** so you would click the pulldown menu under **Tool ID** and select **Object ID**. The **Type** would be set to **Object Type**. **Name** and **Description** would be mapped to **Name** and **Description** and **Link** would be mapped to **Link URL**. The **Part Number** field was used to help create some of the other fields for this example and does not need to be mapped.

$\checkmark$		e Id	Select H entify (	leader Rov Column (D	w (Double-Click Prop-Down Mer	() 😧
Tool ID	Part Number	Туре	Name	Description	Link	
Object ID ~	~	Object Type ~	Name ~	Description ~	Link URL ~	
Tool Inventory			1	1		~
Filtered By: Location = Top Level						
Run Time: 14/01/2025 13:18 : Central Standard Time						
Requested By: Kent, Roy						
Tool ID	Part Number	Type	Name	Description	Link	
100001	L5Ax36xxx	Tool	L5Ax36xxx Files	L5Ax36xxx Description	file:\\fileserver\Snapon\L5Ax36xxx	
100002	OEX20B	Tool	OEX20B Files	OEX20B Description	file:\\fileserver\Snapon\OEX20B	
100003	OEX18B	Tool	OEX18B Files	OEX18B Description	file:\\fileserver\Snapon\OEX188	
100004	OEX16B	Tool	OEX16B Files	OEX16B Description	file:\\fileserver\Snapon\OEX168	
100005	OEX14B	Tool	OEX14B Files	OEX14B Description	file:\\fileserver\Snapon\OEX148	
100006	OEX12B	Tool	OEX128 Files	OEX128 Description	file:\\fileserver\Snapon\OEX128	
100007	OEXM100B	Tool	OEXM100B Files	OEXM100B Description	file:\\fileserver\Snapon\OEXM100B	
100008	OEXM110B	Tool	OEXM110B Files	OEXM110B Description	file:\\fileserver\Snapon\OEXM110B	
100009	OEXM120B	Tool	OEXM120B Files	OEXM120B Description	file:\\fileserver\Snapon\OEXM120B	
100010	OEXM130B	Tool	OEXM130B Files	OEXM130B Description	file:\\fileserver\Snapon\OEXM130B	
100011	OEXM140B	Tool	OEXM140B Files	OEXM140B Description	file:\\fileserver\Snapon\OEXM140B	
100012	RXFS2022B	Tool	RXFS2022B Files	RXFS2022B Description	file:\\fileserver\Snapon\RXFS2022B	
100013	RXFS2426B	Tool	RXFS2426B Files	RXFS2426B Description	file:\\fileserver\Snapon\RXFS2426B	
100014	OEX24B	Tool	OEX24B Files	OEX24B Description	file(\\fileserver\Snapon\OEX248	
100015	OFX32B	Tool	OEX328 Files	OFX328 Description	file:\\fileserver\Spapon\OFX328	
100016	OEX30B	Tool	OEX308 Files	OEX30B Description	file:\\fileserver\Snapon\OEX308	
100017	OFX28B	Tool	OEX288 Files	OFX288 Description	file:\\fileserver\Spapon\OFX288	
100018	OEX22B	Tool	OEX22B Files	OEX228 Description	file:\\fileserver\Snapon\OEX228	
100019	OEXM190B	Tool	OEXM190B Files	OEXM190B Description	file:\\fileserver\Snapon\OEXM190B	
100020	OEXM180B	Tool	OEXM180B Files	OEXM1808 Description	file:\\fileserver\Snapon\OEXM180B	
100021	OEXM1708	Tool	OEXM170B Files	OEXM1708 Description	file:\\fileserver\Spappe\OEXM170B	
100022	OEXM160B	Tool	OEXM160B Files	OEXM160B Description	file:\\fileserver\Snapon\OEXM160B	
100023	OEXM150B	Tool	OEXM150B Files	OEXM1508 Description	file:\\fileserver\Snapon\OEXM150B	
100024	FADH12A	Tool	FADH12A Files	EADH12A Description	file/\\fileserver\Snapon\FADH12A	
100025	RXFS16188	Tool	RXES1618B Files	RXFS1618B Description	file:\\fileserver\Snapon\RXFS1618B	
100026	RXES12148	Tool	RXES1214B Files	RXES12148 Description	file:\\fileserver\Snapon\8XFS1214B	
100027	RXESR10R	Tool	RXESR108 Files	RXESR108 Description	file:\\fileserver\Spapon\RXFSR10B	
100028	OEX26B	Tool	OEX268 Files	OEX268 Description	file/\\fileserver\Snapon\OEX268	
100029	SPRSRO	Tool	SPBSBO Files	SPBS80 Description	file:\\fileserver\Snapon\SPBS80	
100030	BADIC 10	Tool	BADIC10 Files	BADIC10 Description	file(\\fileserver\Snapon\BADIC10	



Once all the fields are mapped properly, you can click the **OK** button that looks like a green checkmark to start the actual importing of the attachments. This may take a while depending on how many attachments are being added.

A "Success" message will appear when the import process is complete.





#### Audits

This document will cover everything you need to know about audits in the L5 Connect system. Covering the setup of audits in the admin client, assigning an audit to a location, and performing an audit on a supported device. **Note: The audit feature is currently only supported on the ATC Toolbox, Locker, and FlexHub.** 



## Setup Audits within L5 Admin Client

Audits are customizable to meet each individual customers' requirements or audit policies. The process of creating and assigning is very straight forward, accomplished using the L5 Admin Client.

#### Access Point:

• L5 Connect Admin Client- Admin Client Dashboard/Settings/Audit Types

#### **Required Permissions:**

• Audit Types Edit

#### **Creating Audits**

- 1. Open the L5 Connect Admin Client, and complete User login.
- 2. Navigate to Settings=>System Configuration=>Audit Types





3. This will bring up the **Audit Types Screen.** You can use the search bar to filter the list for a specific audit, and you can tap the green **plus** to create a new audit type.

	Audit Types	
Q. X		٦
Name		
Alert Status Types Corona Audit		
Drawer Issued Audit		
Individual Tool Status		
L		

4. When you tap on the green plus button, the create new Audit Type tab will display (shown below).

	Audit Types	
Q X		
Name	Name	4
Alert Status Types	Instructions	
Corona Audit	Dual User	
Drawer Issued Audit	Tool Confirmation Type None 👻 🖹 Filtered	
individual fool status	Assume Confirm User does not have to press the Confirm button if checked	
	Coptical Toolbox	
	*Tool confirm option none only supports drawer grouping	)
	ر Locker Hub	
	Trigger Verifications  Prompt for verifications when compartment opened and tool present.	
	Tag Confirm  Prompt for tag scan when compartment opened and tool present.	
		1
	1	

- **Name:** This is the name of the audit. This will show up in the Audit Type List and on the ATC device when assigned.
- Instructions: These are the instructions that are displayed to the user during the Audit on the Toolbox
- **Dual User:** If you want to have a second auditor verify the Audit, you will check this box. When checked, the device will require two different users to start and end the Audit on the device.
- Tool Confirmation Type: If you want to Audit only specific tools that are in a particular state (None, Issued, Statused, Alerted, and Maintenanced), you can set it here. Note: currently kit children are NOT included when checking for applicable compartments
  - None All compartments, regardless of contents, will be included in the audit.



- Issued All inventory compartments will be included in the audit. This includes inventory compartments with no assigned tools. This includes issued tools.
   Note: This excludes all "drop off" mode compartments.
- Alerted All inventory compartments containing tools with an alerted state will be included. This DOES include issued tools. This excludes tools with "managed out" status types applied.
- Statused All inventory compartments containing tools with ANY applied status will be included. This DOES include issued tools. This DOES include managed out status types.
- Maintenanced All inventory compartments containing tools with ANY applied maintenance items will be included. This DOES include issued tools.
- **Confirmation Type Options:** If a tool confirmation type is selected the user will also select the confirmation type options listed below. **Note: initial release does not support selection of mode for FlexHub, operation is confirmed to "Individual" confirmation type** 
  - Individual If any selected individual audit type applies to a compartment, that compartment will be opened and prompted for any applied confirmations. Applied compartments will be opened in order. ALL selected + applied individual confirmations will be executed prior to moving to the next compartment. Once all individual compartments have been confirmed, any applicable Grouped audit confirmations will be triggered. Reopening a previously audited compartment will re-prompt for all applied confirmations.
- **Assume Confirm:** If assume confirm selected the user will not have to click the confirm button, and instead close the door/drawer and the device will assume confirmation.
- **Imaging System:** The imaging system option is only supported on the ATC Toolbox, and can be applied to tools that have been filtered via the Tool Confirmation Type.
- Trigger Verifications: If ANY selected audit has verification prompt option enabled, verification prompts will be triggered if a compartment is opened. It doesn't matter if the audit in question applies to that compartment or not.
  - Group confirm audit types will not force opening of a compartment, but if verification prompt is enabled it will trigger if the compartment is opened for another reason.
  - If a tool has a return and an issue verification, both verifications will be prompted.
     Special case: if a tool has the same verification for both issue & return, it will only prompt once
  - Verifications will be prompted EVERY time a compartment is opened. (Exception: during a single compartment audit, if the user closes the door but uses the diagnostics menu to request "Reopen Door" prior to completing confirmations, it will not re-prompt verifications.)
  - Verification options will be identical to normal use. If dual badge scan is required to verify, it will also be required if prompted during audit.
  - Declining verification during audit will set status on tool and create event log, but will not cancel an audit in progress.
  - A pending verification prompt will interrupt "auto confirm" behavior.
     If the user completes all verification prompts prior to closing the door, auto confirm will behave as normal.
     If the user closes the door prior to completing the verification prompts, auto confirm will be disabled and the user will have to manually select confirm/exception option.
- **Tag Confirm:** Auditor will be required to scan the tag on the tool as part of the audit of each compartment, when the compartment is opened and the tool is present.
- 5. Click the save icon in the top right corner to save your new audit type.



#### Assigning Audits to a Device

Once you have saved your new audit type, it will show up in the Audit Type List on the left side. You can now assign this audit type to a supported device. You can assign audit types directly on a device, or you can assign it to a location, and all devices in that location will have the Audit assigned.

1. To assign the Audit, you must go to the **locations tab**.

STATE	<b>1</b>	7	Top Level					Change C	Current Locati	ion	SuperUser	Click to logout
			Dashboard	Locations	Tools T	ool States	Employe	es Groups	History	Report	s Settings	
			Device Status	•▲	Hide OK Items	Alerts:				ľ,	/ork Location Status 🗸 🗆 Hide OK Items 🛛 Alerts:	
			Name Alerts	s Issue ssued Use	rs Mngd Out	Alert	Device	Tool		N	ame Alerts Issued Issued Users Issued Devices Mngd Out Alert Device Tool	
Sustan Status Ei	Itorod	Total	Z928T001 2	3 1	0	Offline	Z928N006	SimulatorToolbox54	4 ^			
System Status	itterea	Total	Z99LS001 20	9 3	0	Wrong Tool	Z928N006	AZA				
Devices Online :	0	0	Z928N006 2	1 1	0	Offline	Z9888001	L5ATCPORTAL	-			
Devices Offline :	8	8	Z9788012 1	11 3	0	Offline	Z99L5001	ToolCrib	-			
Tools Issued :	24	24	29888001		0	Into Conflict	Z99LS001	NYZ/000MDKII	-			
Users with Tools Issued :	3	3	29580001		0	Info Conflict	29915001	434RDC	-			
Devices with Tools Issued :	7	7	Z998T002	0 0	0	Info Conflict	29915001	WIND100				
Tools lowed with Alasta		1			-	Info Conflict	Z99L5001	WIND100	-			
Tools issued with Alerts :			1			Info Conflict	Z99LS001	WIND100	-			
Managed Tools Out :	0	0	1			Info Conflict	Z99LS001	WIND100	-			
Tools Managed : 1	1187	1187	1			Info Conflict	Z99LS001	PT1800AL				
			1			Info Conflict	Z99LS001	PT1800AL				
			1			Info Conflict	Z99L5001	PT1800AL				
		J	i .			Info Conflict	Z99LS001	WMH140170	~			
Top Employees with Issued Tools	Top	Work Loca	tions with Issue	d Tools	Top Dev	vices with Issu	ed Tools		Recent Eve	ents		
Earliet For	14				70700043			12	Time Action	Part Nu	mber Employee Source Destination	
Socket, Sue					29/88012							
Mechanic, Mike	5				Z99L5001			9				

- 2. Select the device or location where you want the audit to be available.
- 3. Go to the Audit Types Tab

नितन्तन	Top Level			Change C	urrent Location	SuperUser				Click to logout
	Dashboard Locatio	ns Tools Tool State	s Employ	ees Groups	History Rep	orts Settings				
	Z92BT001 Optical Toolbox									
Z92BT001	Info Profiles Profiles	Options Inventory	Status	Subscriptions	Audit Types	Quantity Monitoring	Attachments	Favorites	1	
293AU001 7978B012	(Employee) (Group)		•							
Z98BB001	Name 7928100	1								
Z99BT001	Customer ID 792BT00									
Z99B1002 Z99LS001	Notes	-								
	Present Location Tax Location									
	Parent Location top Level									
	Responsible Employee 🖉 🗙	)								
	Serial Number (Device) Z92BT00									
	Current Version 9.9.8.021	5								
	Service Connection Online (3	/18/2024 2:38:18 PM)								
	PC Info Dell Inc. (	XRC2C								
	OS Version Microsof	Windows NT 10.0.22621.0								
	Hardware Info Toolbox I	mulator								
	Default Tolerance 0									
	Device Info Customer ID Serial Number (Tool) Tag 2	0								



4. Select the audit type you want to assign. You will need to mouse over the white box to display the list of available audit types.

Sama	$\overline{\mathbf{n}}$	Top Level					Change	Current Location	SuperUser				Click to logout
		Dashboa	rd Locati	ons Tool	s   Tool State	es Employ	ees Groups	History Rep	ports Settings				
		292BT	001									-	
A Ten Loud		Optical	Toolbox										
Z92BN006		•					~			~			
Z92BT001 Z93AU001	Info	Profiles	Profiles	Options	Inventory	Status	Subscriptions	Audit Types	Quantity Monitoring	Attachments	Favorites		
Z97BB012	Inherited	(Employee)	(Group)			-							]
Z98BB001 Z99BT001													
Z99BT002	Direc	ctiy Assigned	1										
29915001			Audia 1										
			Audit 2										
Show Deleted Items													

5. Click the Save Button in the upper right to apply the audit to the box.

STATION	Top Level Change Current Location	Click to logout	
Budge	Dashboard Locations Tools Tool States Employees Groups History Reports Settings		
۹ 📃 😜	🚔 💷 🗐 🖓	<b>M</b>	
Vame ·	Optical Toolbox		
292BN006 292BT001 293AU001	Info (Employee) (Group) Options Inventory 🚺 Status Subscriptions Audit Types Quantity Monitoring Attachments Favorites		
Z97BB012 Z98BB001 Z99BT001	Inherited from Parent		
Z99B1001 Z99BT002 Z99L5001	Directly Assigned 🗙 Audit 1		



# Supported Device by Device Procedure

#### **Required Permissions**

• Audit

#### ATC FlexHub

1. Login to the FlexHub and select the Audit button on the Select Work flow screen.

		Select Work	Flow		SuperUser Click to	logout	
Return	Retur	n other user tools	Issue		Audit		
Drop off tools		Drop off oth	er user tools	Receive Tools			
Tool Courier							
Pick up tools Deliver tools Reload Bags							
Scan Receipt Barcode for Current Status							

2. When you enter audit mode, you will see a list of available audits you can perform on the right side. Select the Audit, or Audits you want to perform and tap the green checkmark. Auditors will be shown a confirm/exception screen for each audit that applies for a specific compartment.

					Audit	
All U	Jsers			Select: Audit Types		
<b>1</b> 6	<b>*</b> 11			Audit 1		
۹				Audit 2		
	Part Number Serial Number	Details				
*	NT001 Serial#	Allen Wrench Set SuperUser 12/22/2023 9:07 AM, In Transit In Trans	l .			
s.	434HDC Serial#434HDC-1 Door 11	¾" DR SET w/CASE & FOAM Mechanic, Mike 3/20/2024 3:29 PM				
S	ATI590L Serial#ATI590L-01 Door 5	Kit - Rivet shaver Socket, Sue 3/7/2024 2:13 PM	•			
s S	CTECH4R600A Serial#TW-0002 Door 17	600 ft. lb. torque wrencł Socket, Sue 3/7/2024 2:13 PM	<u> </u>			
Se a la l	CTECH4R600A Serial#TW-0003 Door 16	600 ft. lb. torque wrench Socket, Sue 3/7/2024 2:13 PM	•			
S)	NT001 Serial#	Allen Wrench Set Socket, Sue 1/3/2024 8:23 AM				
S.	NT001 Serial#	Allen Wrench Set Socket, Sue 12/27/2023 1:45 PM	*			
a	NT001	Allen Wrench Set				



3. The system will ask for the badge of the Primary auditor, which must be the currently logged in user. If Dual User is enabled on the Audit Type, a second user will also need to swipe their badge to begin.



4. Perform the task or check that the instructions describe, scan the tag on the tool if prompted, tap either the Confirm or Exception button to mark if the task or check was completed successfully, then close the door. The next compartment door will not open until the previous door is closed. If the Assume Confirm option is enabled for the Audit type selected, the user does not have to click the Confirm button and can instead shut the compartment door. The system will assume confirm in that case, if an exception is required select the option and then close the compartment door.



The Auditor can make and save changes to tool issued state, tool statuses, and tool maintenance based on their edit permissions. Any changes must be saved or cancelled to advance the audit.



Confirm Audit the tool	Exception	
This compart	tment has no assigned inventory and is expected	l to be empty.
CTECH4R600A 600 ft. lb. torque wrench Confirm	n Text that will be Displayed <b>Except</b> i	on
Z97BB012/Door 16		
Socket, Sue 3/7/2024 2:13:07 PM (Qty:1)		
Info	ssued	Status





A message will be displayed onscreen for each compartment door opened; This informs the user of a compartments assigned inventory, compartments issued state, or compartments configuration like shown above.

Please select an option.							
Cancel process	Door won't close						
Doors are closed	Reopen Doors						

If the user has any issue with the audit or wishes to cancel an audit in progress, click on the diagnostic button in the top left corner. This will give the user the following options to select: Cancel process, Door won't close, Doors are closed, Reopen Doors (shown above).

5. At any point during the audit the auditor can reopen any compartment by pressing the compartment display on the right side of the screen (shown below). Any confirmations/verifications will be repeated for any



#### compartment that is reopened.

Au	dit: Comple	Primary Auditor te Schennic, Mike	<del>年</del> Scan user badge	Secondary Auditor	Audit
■ AII U ■ 6 ■	/sers				
	Part Number Serial Number	Details	11 12	•	
*	NT001 Serial#	Allen Wrench Set SuperUser 12/22/2023 9:07 AM, In Transit In Trans			
<b>S</b>	434HDC Serial#434HDC-1 Door 11	¾" DR SET w/CASE & FOAM Mechanic, Mike 3/20/2024 3:29 PM	13	14://19	•
e de la companya de l	ATI590L Serial#ATI590L-01 Door 5	Kit - Rivet shaver Socket, Sue 3/7/2024 2:13 PM			
<b>S</b>	CTECH4R600A Serial#TW-0002 Door 17	600 ft. lb. torque wrench Socket, Sue 3/7/2024 2:13 PM	15	• 16 •	
<b>S</b>	CTECH4R600A Serial#TW-0003 Door 16	600 ft. lb. torque wrench Socket, Sue 3/7/2024 2:13 PM			
<b>S</b>	NT001 Serial#	Allen Wrench Set Ryan, Dylan J. 1/3/2024 8:23 AM	17	• 18 •	
<b>S</b>	NT001 Serial#	Allen Wrench Set Socket, Sue 12/27/2023 1:45 PM	* Issued Empty	]	
٩	NT001	Allen Wrench Set		Tap compartment above to open	

- 6. When confirming the last tool, the system will then ask the auditor to swipe their badge to complete the Audit. Remember, if Dual User is enabled on the Audit Type, it will ask for a second user to swipe their badge to complete the Audit.
- 7. Once the auditor has swiped their badge, the system will complete the Audit and preset the success message on the screen.

c Employee	Select Work Flow	SuperUser Click to logout					
Return	Return other user tools	Issue					
Drop off tools	Audit Drop off other user tools Success	Receive Tools					
Pick up tools	Deliver tools	Reload Bags					
Scan Receipt Barcode for Current Status							



#### ATC Locker

- 1. Navigate to **Settings=>Audit** and login to the Locker.
- 2. When you enter audit mode, you will see a list of available audits you can perform on the right side. Select the Audit(s) you want to perform and tap the green checkmark.

	ers	2	L Me		Audit	
	Part Number Serial Number	Details		Sele	ct: Audit T	ypes
!	NT001 Serial#	Allen Wrench Set Verify			Audit 1	
!	NT001 Serial#	Allen Wrench Set Verify			Audit 2	

3. The system will ask for the badge of the auditor. If Dual User is enabled on the Audit Type, a second user will also need to swipe their badge to begin.



All Users	Audit €
Part Number Details	
	Audit: Start
Full-scree	Primary Auditor
	SuperUser
	Scan user badge 🕇
All Users	Audit 200
(	
Part Number Details	Audit: Start
Part Number Details	Audit: Start
Part Number Details	Audit: Start Primary Auditor SuperUser
Part Number Details	Audit: Start Primary Auditor SuperUser
Part Number Details	Audit: Start Primary Auditor $\searrow$ SuperUser $\checkmark$ Scan user badge Secondary Auditor

4. The system will display a list of tools in inventory that fit whichever filters in the audit are selected. The Auditor can make and save changes to tool issued state, tool statuses, and tool maintenance based on their edit permissions.



5. Perform the task or check that the instructions describe, tap either the Confirm or Exception button to mark if the task or check was completed successfully, then close the door.

Text that this be bisplayed	
Details	
Allen Wrench Set Mechanic, Mike 1/17/2024 2:50 PM	*
Pallet Jacks- 27x48	
Pallet Jacks - 27x42	•
Pallet Jacks - 27x42	*
firm Exception	
	Details       Allen Wrench Set Mechanic, Mike 1/17/2024 2:50 PM       Pallet Jacks - 27x48       Pallet Jacks - 27x42       Pallet Jacks - 27x42

#### Text that will be Displayed

6. After the closing the door to the locker, the system will then ask the auditor to swipe their badge to complete the Audit. Remember, if Dual User is enabled on the Audit Type, it will ask for a second user to swipe their badge to complete the Audit.

	All Users	Audit	
Part Number Details	Audit	t: Comp nary Audit SuperUse	lete or
	Scar	n user bad	ge 懀
	Seco	ndary Aud	itor Mike

7. Once the auditor has swiped their badge, the system will complete the Audit and preset the success message on the screen.



#### ATC Toolbox

- 1. Navigate to **Settings=>Audit**
- 2. When you enter audit mode, you will see a list of available audits you can perform on the right side. Select the Audit(s) you want to perform and tap the green checkmark.

All Users				2 Me		
<b>!</b> 2/	2	<i>/</i> 5	?1		<mark>/</mark>	Audit
Part	Number	Details			Sele	ct: Audit Types
! OEX2	22B Dwr6	Wrench, Combinatio Length, 11/16", 12-P SuperUser, SUPERU	n, Standard oint <i>JSER 10/14/2021</i>	*	My	/ Custom Audit
! NDD	M80 Dwr4	Nut Driver, Metric, E Handle, Black, 8 mm	rgonomic , 169.1 mm			
J QD2I	<b>R1000</b> Dwr 5	Torque Wrench, Adj. Fixed-Ratchet, 200-1 drive SuperUser, SUPERU	Click-type, U.S., 000 in. lb., 3/8" JSER 10/26/2021			
<i>S</i> GDI	MRC1A Dwr2	Screwdriver Handle, Grip, Stubby, Red Tech, ATC 10/14/2	Ratcheting, Soft 2021 1:48 PM	•		
	12 Dwr 1	Socket, Deep, 3/8", 6 SuperUser, SUPERU Cutter, Tubing (1/8"	-Point JSER 10/14/2021 - 1 1/8" O.D.	*		$\checkmark$

The system will ask for the badge of the auditor. If Dual User is enabled on the Audit Type, a second user will



also need to swipe their badge to begin.

	sers	<b>Ž</b> M	e V	Audit
	Part Number Serial Number	Details		udit: Start
۹۵ ک	A2A Serial#AZ-0200 Dwr 1	Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16" Socket, Sue 3/7/2024 4:02 PM	Pri	mary Auditor
S.	FRHM18 Serial#TW-0002 Dwr 1	Wrench, Metric, Crowfoot, Flare Nut, 18 mm, 6-Point Socket, Sue 3/7/2024 4:02 PM	⇒ S¢	Mechanic, Mike can user badge
S.	TMM10 Serial#AW-0001 Dwr 1	Socket, Metric, Shallow, 10 mm, 6-Point Socket, Sue 3/7/2024 4:02 PM	Seco	ondary Auditor
	_			

3. The system will then display all the drawers with a RED and BLACK banner to indicate that the Audit has not been performed on the drawer. Open one of the drawers, and you will be presented with the Audit Confirmation Screen.



• **A.** Drawer ID – Current Drawer that is being Audited



- **B.** Confirm Button Confirms Audit Pass or an action such as cleaning was performed, you would tap this button.
- **C.** Exception Button If an item failed the Audit or the action such as cleaning was not performed for some reason, you would tap this button.
- **D.** Audit Instructions Displays what the user needs to do or check.
- 4. Perform the task or check that the instructions (D) describe, tap either the Confirm (B) or Exception (C) button to mark if the task or check was completed successfully, then close the drawer. The RED and Black bar is then removed from the drawer.



5. Repeat this task until you have completed all drawers. When you close the last drawer, the system will then ask the auditor to swipe their badge to complete the Audit. Remember, if Dual User is enabled on the Audit Type, it will ask for a second user to swipe their badge to complete the Audit.



All Users		2 Me		
<b>!</b> 2 <b>/</b> j2	<b>/</b> 5 <b>?</b> 1		<mark>/</mark>	Audit
Part Number	Details			
! ∂ Dwr 6	Wrench, Combination, Standard Length, 11/16", 12-Point SuperUser, SUPERUSER 10/14/2021	*	Prii	mary Auditor IperUser, SUPERUSER
I NDDM80	Nut Driver, Metric, Ergonomic Handle, Black, 8 mm, 169.1 mm		🔶 So	an user badge
QD2R1000 Dwr 5	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 200-1000 in. lb., 3/8" drive			
SGDMRC1A	Screwdriver Handle, Ratcheting, Soft Grip, Stubby, Red Tech, ATC 10/14/2021 1:48 PM	•		
STM12 Dwr 1	Socket, Deep, 3/8", 6-Point SuperUser, SUPERUSER 10/14/2021	÷		
тс280	Cutter, Tubing (1/8" - 1 1/8" O.D.			

Once the auditor has swiped their badge, the system will complete the Audit and preset the success message on the screen.





### Event Log

After you have completed the Audit on the device, you can view the results of the Audit in the L5 Connect<sup>™</sup> Admin Client History tab.

1. Log into the L5 Connect<sup>™</sup> Admin Client and go to the History Tab

TOT-IN	5		Top Level						Change	Current Lo	ocation	superoser						Click to logout
			$\equiv$															
			Dashboa	rd Locatio	ns To	ols To	ol States	Employe	es Groups	History	y Rep	orts Settings						
			Device Sta	ıtus 🚺 🔦	6 🗆 Hi	de OK Items	Alerts:					Work Location St	atus 🚺 🗆	Hide OK Iter	775	Alerts:		
			Name	Alerts Issued Is	sued Users	Mngd Out	Alert	Device	Tool	T		Nama Alaste Issued	Irruad Linery Irr	und Davicar	Mand Out	Alert Device	Tool	
			Z99LS001	20 9	3	0	Offline	Z92BN006	SimulatorToolbox	54		Hunc Herb Issee			migorout	Here bence	1001	
System Status	Filtered	<u>Iotal</u>	Z928N006	2 1	1	0	Wrong Tool	Z928N006	AZA	_								
Devices Online :	: 1	1	Z9788012	1 11	3	0	Offline	Z988B001	LSATCPORTAL	-								
Devices Offline :	7	7	Z928T001		1	0	Offline Info Conflict	Z99L5001	ToolCrib	- 11								
Tools Issued :	24	24	Z93AU001		1	0	Info Conflict	29915001	434HDC	-								
Users with Tools Issued :	3	3	Z998T001	1 0	0	0	Info Conflict	Z99LS001	WIND100									
<b>Devices with Tools Issued :</b>	. 7	7	Z998T002	1 0	0	0	Info Conflict	Z99LS001	WIND100									
Tools Issued with Alerts :	1	1					Info Conflict	Z99LS001	WIND100									
Managed Tools Out :	0	0	1				Info Conflict	Z99L5001	WIND100	_								
Tools Managed :	1187	1187					Info Conflict	299LS001	WIND100									
loois managea .							Info Conflict	29915001	PT1800AL PT1800AL									
			1				Info Conflict	Z99L5001	PT1800AL	-								
		J	1				Info Conflict	Z99LS001	WMH140170	~	J							
Top Employees with Issued Tools	Тор	Work Loca	tions with I	ssued Tools	Ĩ	Top Devi	ces with Iss	ued Tools		Recent	Events	<u> </u>						
Socket. Sue	14					79788012			12	Time		Action	Part Number	Employee	Source	Destination		
					I					3/18/2	024 3:38:16	PM Unauthorized Use	r		Z928T001			
Mechanic, Mike	5				I	Z99LS001			9	3/18/2	024 3:38:12	PM Unauthorized Use	r		Z928T001			
Ryan, Dylan J.	5				I	Z92BT001			3	3/18/2	024 3:37:23	PM Unauthorized Use	r -		Z9281001 Z9281001			
					I					3/18/2	024 3:36:54	PM Unauthorized Use	r		Z928T001			
					I	Top Level				3/18/2	024 3:36:38	PM Unauthorized Use	r		Z928T001			
					I	Z92BN006			1	3/18/2	024 3:33:43	PM Unauthorized Use	r		Z928T001			
					I	79888001			1	3/18/2	024 3:33:30	PM Unauthorized Use	r		Z928T001			
					I					3/18/2	024 3:33:16	PM Unauthorized Use	r		Z928T001			
						Z93AU001			1	3/18/2	024 3:30:10	PM Unauthorized Use			Z9281001			
										3/18/2	024 3:25:17	PM Unauthorized Use	r		Z928T001			
										3/18/2	024 3:23:51	PM Unauthorized Use	r		Z928T001			

2. Filter the Action Column to Audit

	Action	0.0		0.5	0 M	<ul> <li>Source Location</li> </ul>		0	0.4	0.8-1-	
Date	audit	Owr	I Part Number	Employee	Affected Employee	z64d	Destination Location	Group	() Info	I Data	
3/19/2024 2:17:05 PM	Secondary Audit Badge Scan			SuperUser	Mechanic, Mike	Z64DN007 Red					
3/19/2024 2:16:54 PM	Box Audit Started			SuperUser		Z64DN007 Red					
3/19/2024 1:46:51 PM	Box Audit Complete			SuperUser		Z64DN007 Red					
3/19/2024 1:45:57 PM	Box Audit Drawer Confirmed			SuperUser		Z64DN007 Red				Audit Type: New Audit	
3/19/2024 1:45:20 PM	Secondary Audit Badge Scan			SuperUser	Mechanic, Mike	Z64DN007 Red					
3/19/2024 1:45:00 PM	Box Audit Started			SuperUser		Z64DN007 Red					
3/19/2024 1:44:57 PM	Box Audit Failed			SuperUser		Z64DN007 Red				Audit: Cancelled	
3/19/2024 1:43:25 PM	Box Audit Started			SuperUser		Z64DN007 Red					ł

- The Action Box Audit Start is the beginning of an Audit on a device, and Box Audit Complete is the end of the Audit.
- Each drawer result will be listed between the Start and Complete actions.
- The Name of the Audit that was being performed will be listed in the Data column.

To generate an audit report, you will need to create a custom Event History report.



#### Certifications

Certifications allow you to mark certain tools so they can only be issued to employees who have been certified to use them. This document will cover how to set up certifications for your L5 Connect system. It will walk through setting up the certifications with the Admin application and then the process of issuing tools with certifications from a device.

NOTE: Certifications are currently only supported by the FlexHub device.



## **Creating Certifications**

The first step in setting up certifications in your L5 Connect system is to create a certification. This is done with Admin application.

#### **Basic Certification**

Start the Admin app, log in, and go to the Settings tab.





Click the **System Configuration** item in the list of items on the left-hand side. Then click the **Certifications** button.



Click the **New** button to create a new certification.





To give your certification a name, type it into the **User Text** field. For this case we will create a certification called **Basic Certification**.

	Certifications	
<b>٩</b>		
Name	User Text S Basic Certification	
	Require PIN on Tool Issue	
	NOTE: Certifications are supported on Locker Hub only	

Note that you can provide translation into other languages supported by the L5 Connect system by clicking the **Edit Multiple Languages** button, which looks like a globe.

Info	
User Te	ext S Basic Certification
Lock	(er 🏫b ————
	equire PIN on Tool Issue
NOTE	: Certifications are supported on Locker Hub only

Then you will check the Enable Multiple Language Display checkbox.





Provide translations of your certification name for any required languages and then click the **OK** button that looks like a green checkmark.



Finally, click the **Save** button that looks like a blue diskette to save your new certification.

	Certifications
R X	Info User Text Basic Certification
	Locker Hub
	NOTE: Certifications are supported on Locker Hub only

#### Certification Requiring a PIN on Tool Issue

The L5 Connect system also provides the ability to require a PIN to be input to allow the issue of a tool with a certification.



To create a certification requiring a PIN, you would click the **New** button on the certification page to start a new certification. Then provide a name in the **User Text** field and check the **Require PIN on Tool Issue** checkbox.

	Certifications	•
R 2	User Text S Certification with PIN	
Basic Certification	Locker Hub Require PIN on Tool Issue NoTE: Certifications are supported on Locker Hub only	

After clicking the **Save** button that looks like a blue diskette you will have created two new certifications to use, with one requiring an additional PIN.

	Certifications	B
۹ 🛛 🗙	Info Employees Assigned Master Tools	
Name ~	User Text S Certification with PIN	
Basic Certification Certification with PIN	Locker Hub	



## Assigning Certifications To Tools

Once you have created some certifications you need to assign those certifications to tools that should only be issued if the employee has been certified to use them. Go to the **Tools** tab of the Admin application and select the tool to which you would like to assign a certification.





Then select the **Certifications** sub-tab.

Some	Top Level Change Current Location SuperUser Click to logout								
	Dashboard	Locations To	ools Tool States	Employees	Groups	History	Reports	Settings	
Cert X Part Number CertTool	ool Ile tool requiring	a certification							
CertToolPIN	Maintenance rtTool ample tool requi urable 2 × 2 × 2 × 2 × 2 ×	Contained In ring a certification	Quantity Monitori	ng Attachman	ents C Photo -		Optical	Toolbox	

Click the **New** button to add a certification to this tool.

70-10	Top Level SuperUser								Click to logout	
Dich									6 - 11 <sup>1</sup>	)
Cert X	E.	Dasnboard	Locations	ion States	Employees	Groups	History	керогт	Settings	
Part Number ~	Cert1 Exam	<b>ool</b> ple tool requiring	a certification							
CertTool										
CertToolPIN	Info Instances	Maintenance	Contained In	Quantity Monitori	ng Attachn	nents 🛛 Co	ertifications	Optical	Toolbox	
	🕑 Name 💿 Requ	ire PIN on Tool Is	isue							
Show Deleted Items										

- 0 ×



Now select the certification you wish to add to the tool and then click the **OK** button that looks like a green checkmark.

	Select type for new item
<b>Q</b>	Info Employees Assigned Master Tools
Name v	User Text 🖉 Basic Certification
Basic Certification	Locker Hub
Certification with PIN	Require PIN on Tool Issue
	NOTE: Certifications are supported on Locker Hub only

Then click the **Save** button that looks like a blue diskette to finish adding the certification to the tool.

Snap-on LS Connect Admin Client, v:9.14.1.0418										- 0	×
Go-To		Top Level	n 🍰 s	uperUser	Click to lo	gout					
		Dashboard	Locations T	ools Tool States	Employees	Groups	History	Reports	Settings	)	
Cert X Part Number CertTool CertToolPIN	CertT Exam Info Instances	ool ple tool requiring Maintenance Require PIN on To	a certification Contained In Co	Quantity Monitor	ing Attachn	nents C	ertifications	Optical	Toolbox		
Show Deleted Items											

We will then repeat this process to add the certification requiring a PIN to the **CertToolPIN** tool for illustrating the issuing tools with certifications section.


### To Employees

To issue a tool with a certification, an employee will need to have that certification assigned to them. To do this you will need to go to the **Employees** tab of the admin and select the employee to whom you wish to assign a certification.



#### Select the **Certifications** sub-tab.

Snap-on L5 Connect Admin Client, v:9.14.1.0418		- o ×
STITIC	Top Level Change Current Location	Click to logout
	Dashboard Locations Tools Tool States Employees Groups History Reports Settings	
۹ 📃 🗙		
Name ~	SuperUser	
Helicopter Maintenance Hangar, Ed ^		
Helicopter Maintenance Hangar, Fre	Info Profiles Memberships Subscriptions Attachments Certifications	
Helicopter Maintenance Hangar, Ge Helicopter Maintenance Hangar, Jer	Last Name SuperUser	
Helicopter Maintenance Hangar, Ka	First Name Badge X	
Helicopter Maintenance Hangar, Ma	M. Initial	
Helicopter Maintenance Hangar, Tec	Title Dist Cate 2 V	
Helicopter Maintenance Hangar, Toi Plane Maintenance Hangar, Alice		
Plane Maintenance Hangar, Gerald	Email Photo	
Plane Maintenance Hangar, Gina	Cell Phone Carrier None	
Plane Maintenance Hangar, Harold	Home Location Top Level	
Plane Maintenance Hangar, Harry	Language Device Default	
Plane Maintenance Hangar, Jerry	Admin Login	
Plane Maintenance Hangar, Preston	User Name superuser	
Plane Maintenance Hangar, Robin	Change Password Clear Login	
Smith, John J.		
SuperViewer		
Supervisor Assembly Area A, Polly		
Supervisor Assembly Area B, Rachel		
Supervisor Heliconter Maintenance		
Show Deleted Items		



Click the New button. Top Level SuperUser Change Current Lo Click to log ls Tool States Employees Groups History Reports Settings ۹ 2 Nam Helicopter Maintenance Hangar, Ed Helicopter Maintenance Hangar, Fre Info Profiles Memberships Subscriptions Attachments Certifications Helicopter Maintenance Hangar, Ge Helicopter Maintenance Hangar, Jer €;;; Helicopter Maintenance Hangar, Ka Name 
 Sequire PIN on Tool Issue
 Helicopter Maintenance Hangar, Ma Helicopter Maintenance Hangar, Teo Helicopter Maintenance Hangar, Tor Plane Maintenance Hangar, Alice Plane Maintenance Hangar, Gerald Plane Maintenance Hangar, Gina Plane Maintenance Hangar, Harold Plane Maintenance Hangar, Harry Plane Maintenance Hangar, Jerry Plane Maintenance Hangar, Joe Plane Maintenance Hangar, Presto Plane Maintenance Hangar, Robin Smith, John J. SuperUser SuperViewer Supervisor Assembly Area A, Polly ervisor Assembly Area B, Rachel visor Heliconter Maintenance Show Deleted Items 🔁 🔡

Select the certification you would like assigned to the employee and click the **OK** button that looks like a green checkmark.

	Select type for new item
<b>Q X</b>	Info Employees Assigned Master Tools
Name	User Text 🖉 Basic Certification
Basic Certification	f Locker Hub
Certification with PIN	Require PIN on Tool Issue
	NOTE: Certifications are supported on Locker Hub only

Then we will repeat this process to add the Certification with PIN certification to the Superuser employee as well.

Now, because one of the certifications requires a PIN code, we need to assign a PIN code to the employee as well. For more information on how to assign a PIN code, review the PIN code section of the Employee Badges document.

At this point you have set up everything you need to restrict the issue of tools to those who have been certified to use them.



## Issuing Tools with Certifications

If an employee who has the proper certification attempts to issue the tool it will be issued just as it normally would after the system verified that the employee had the proper certification. The employee will be prompted to enter his PIN code if required by the certification.

Enter Pin Code (CertToolPIN/An example tool that requires a certificate and a PIN)						
Show						
7	8	9				
4	5	6				
1	2	3				
	0	CLR				

After successfully inputting their PIN code, the employee will be issued the tool just as he normally would.



When an employee who doesn't have all of the certifications required attempts to issue a tool, he will receive the following pop-up window and not be issued the tool. The pop-up window shows information (part number,



description, etc.) for the tool that cannot be issued.

Employee Missing Required Certification CertTool/Example tool requiring a certification

ОК



### L5 Connect API

The L5 Connect<sup>™</sup> system is built on top of a carefully designed relational database to provide data integrity, flexibility, and extendibility. The API reflects this design in the layout of the objects it provides for reading and updating. This document will help to explain the design philosophy behind the layout of the API and the typical use case for how customers manage data through the API.

Detailed information about how to use the L5 Connect API can be found at https://l5connectapi.com/api/.



Device Setup and Operation



### Wireless Network Connection Process for ATC Devices

This document will cover the recommended method of connecting your ATC device to a wireless network. **NOTE: You will need a keyboard and mouse for this procedure.** 

### Procedure

- 1. Plug in a keyboard and mouse into an open USB Port(s) on the ATC Device.
- 2. On the keyboard, press CTRL+ALT+DELETE. You will see a screen like shown below.

Lock	
Switch user	
Sign out	
Change a password	
Task Manager	
Cancel	
<i>"</i> 你也	

3. Click on the connection symbol, shown below.

Lock		
Switch user		
Sign out		
Change a passwoi	ď	
Task Manager		
Cancel		
		<i>(</i> , 🕂 🖰



4. This brings up the Network Connections menu, shown below.

	Unidentified network ID Internet
Lock	Connected, secured
Switch user	Disconnect
Sign out	Secured
Change a password	<i>k</i>
Task Manager	Secured
Cancel	Secured
	Gecured Secured
	Secured       Image: Secured
	<i>(</i> , + + + + + + + + + + + + + + + + + + +

- 5. Select the Network to which you wish to connect the ATC Device. Enter the Network password and click on the **Connect** button.
- 6. Finally, click Cancel





### **Device Inventory List with Condition Info**

The purpose of this document is to detail the functionality of the main screen inventory condition controls and the inventory screens of L5 Connect system devices. Each device has a portion of the main screen devoted to the display of any tools with conditions that might be of interest, such as tools with alerts or issued tools. There is also a tool inventory screen that uses a similar grid to display all the tool inventory for the device. This document will explain the features of these screens and how to find inventory related information.

# **Inventory Screen**

The basics of the inventory screen are very similar for all the devices with just a couple of differences. The inventory screen can be accessed by clicking the **Menu** button that looks like a gear and then clicking the **Inventory** button. This will show the list of tools in the device, sorted to show tools with a condition at the top of the list. The tool inventory screen can also be accessed by clicking the buttons on the condition control on the main screen. This will present a filtered view of the inventory.

attalitie	Inventory					
	Part Number	Details				
!	AW1015DHK Dwr 7	Set, Wrench, L-Shape, Hex (15 pcs. In BHK15 Metal Index) (.028" to 3/8") Maint Overdue	*			
l	A2A Dwr 1	Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16" Plane Maintenance Hangar, Preston 1/24/2025 4:15 PM	╡			
1	OEX12B Dwr 2	Wrench, Combination, Standard Length, 3/8", 12-Point SuperUser 1/29/2025 4:19 PM	•			
@	FAM10E Dwr 1	Socket Driver, Metric, Hex, Standard, 10 mm SuperUser 1/29/2025 4:15 PM Out for Repl/Rep	•			
	10MA-SGHF616BR Dwr 5	10MA-SGHF616BR	╡			
	235605	Epoxy Adhesive, 1.69 oz., Gray, Work Life: 3 min.	*			



To help you find a specific tool, this screen provides the ability to add filters to the tool list. Click the **Filter** button that looks like a list and a funnel in the top left corner.

etterk.http://	Inventor	r <b>y</b>					$\overline{\mathbf{c}}$
Alert	s Is	sued		Employee	Mngd Out	Status	Drawer
	Part Number		Detail	s			
!	AW1015DHK Dv	wr 7	Set, W 3/8") Maint C	rench, L-Shape, H	Hex (15 pcs. In BH	K15 Metal Index) (.	.028" to 🖡
	<b>A2A</b> Dv	wr 1	Adapt Plan	daptor, 3/8" Internal drive x 1/2" External drive, 1 5/16" Plane Maintenance Hangar, Preston 1/24/2025 4:15 PM			
l	OEX12B Dv	wr 2	Wrenc Supe	Wrench, Combination, Standard Length, 3/8", 12-Point SuperUser 1/29/2025 4:19 PM			
@	FAM10E Dv	wr 1	Socket Supe	Socket Driver, Metric, Hex, Standard, 10 mm SuperUser 1/29/2025 4:15 PM Out for Repl/Rep			*
	10MA-SGHF61	6BR	10144	SCUE616DD			

You will now see a row of buttons that will allow you to add different types of filtering to the list. The **Alerts** button will filter the list to show only tools with alerts. Notice how there is now a button next to the filtering button that can be used to cancel this alerts filter.

ent.hlur		XInve	ntory					$\overline{\mathbf{c}}$
Ale	erts	Issued	E	mployee	Mingd Out	St	atus	Drawer
	Part Nu	umber	Details					
1	AW101	5 <b>DHK</b> Dwr 7	Set, Wrencl Maint Overdu	h, L-Shape, e	Hex (15 pcs. In I	BHK15 Meta	l Index) (.	.028" to 3/8")
		10						



If you click that button and cancel the alerts filter the list will return to the full list of tools. If you then click the **Issued** button, the list will show only issued tools and a new button next to the filtering button will allow you to cancel this filter.

	Inve	entory		~	$\overline{\mathbf{e}}$	
Alerts	Issued	Employee	Mngd Out	Status	Drawer	
Part Numb	er	Details				
A2A	Dwr 1	Adaptor, 3/8" Internal of Plane Maintenance H	Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16" Plane Maintenance Hangar, Preston 1/24/2025 4:15 PM			
OEX12B	Dwr 2	Wrench, Combination, Standard Length, 3/8", 12-Point SuperUser 1/29/2025 4:19 PM				
@ FAM10E	Dwr 1	Socket Driver, Metric, Hex, Standard, 10 mm SuperUser 1/29/2025 4:15 PM Out for Repl/Rep				

If you want to see the list of issued tools for a specific user or set of users, you can click the **Employee** button. This will then open a new window that allows you to select the employees for whom you would like to see their issued tools. The list of employees it shows is restricted to only showing employees who actually have tools issued from the device. There are also buttons to allow you to select all the employees or clear all selected employees.

Filter by: Issued Users						
Plane Maintenance Hangar, Preston	SuperUser					
Select All	Clear All					



Once you have selected the appropriate employees, click the green checkmark button and the list will be filtered to show only tools issued to these employees and there will be a new button to allow that filter to be canceled.

X	Inve	entory
Alerts	Issued	Employee On Angolout Status
Part Numbe	r	Details
OEX12B	Dwr 2	Wrench, Combination, Standard Length, 3/8", 12-Point SuperUser 1/29/2025 4:19 PM
@ FAM10E	Dwr 1	Socket Driver, Metric, Hex, Standard, 10 mm SuperUser 1/29/2025 4:15 PM Out for Repl/Rep

The **Mngd Out** filter button will filter the list of tools to only show tools that have been marked with a status that is defined to be a managed out of box status. That is configured through the Admin application. See the Tool Statuses document for additional details.

6	Inve	entory			$\overline{3}$
Alerts	Issued	Employee	Mngd Out	Status	Drawer
Part N	umber	Details			
@ FAM10	E Dwr 1	Socket Driver, Metric, H SuperUser 1/29/2025 Out for Repl/Rep	ex, Standard, 10 n <i>4:15 PM</i>	nm	



The **Status** filter button will present you with a screen listing all the statuses currently applied to the device or any of its tools. You can select the statuses in which you are interested.

	Filt	er by: Sta	tus
Bad Drawer/Door State	Maintenan	ce Overdue	Maintenance Pending
Out for Replace or Repair			
Select All			Clear All

Then click the green checkmark and the list will be filtered to show only the tools with the statuses you selected.

Provide a second		XInve	nto	ry			$\overline{\mathbf{c}}$
Ale	erts	Issued		Employee	Mngd Out	Status	Drawer
	Part N	umber	Detai	ls			
1	I AW1015DHK		Set, W Maint	/rench, L-Shape, H Overdue	Hex (15 pcs. In BHI	(15 Metal Index) (.	.028" to 3/8")



For optical toolboxes, there will also be a **Drawer** button. Clicking this **Drawer** filter button will show a new screen with a list of all the drawer numbers in the toolbox. You can then select the drawers for which you would like to see the tools.

	Filter by:	Drawer	
1	2	3	\$
4	5	6	
7	8	9	
10	11	12	
Select Al		Clear All	*

Then click the green checkmark button and the list will be filtered to only show tools in the selected drawers.

			Inventory	8				
Ale	rts	Issued	Employee Mngd Out Status	er				
	Part Nu	mber	Details					
1	A2A	Dwr 1	Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16" Plane Maintenance Hangar, Preston 1/24/2025 4:15 PM					
@	FAM10E	Dwr 1	Socket Driver, Metric, Hex, Standard, 10 mm SuperUser 1/29/2025 4:15 PM Out for Repl/Rep					
	F80	Dwr 1	Ratchet, Sealed Head, Dual 80 Technology, Standard Handle, 3/8" drive, 7 11/32"					
	FAM11E	Dwr 1	Socket Driver, Metric, Hex, Standard, 11 mm					
	FAM12E	Dwr 1	Socket Driver, Metric, Hex, Standard, 12 mm	*				



Devices that come equipped with a large monitor and keyboard will have a text-based search bar on this screen as well as the other filtering options. This search bar will filter any tools that don't contain the string in the part number, description, storage sub-location, or issued to information.

attut.latier	<b>P</b> II	nventory	
Q	X ctec	h	
		Part Number	Details
	!	CTECH3FR250A	1/2° Drive Fixed - Head Aluminum Body ControlTech <sup>™</sup> Industrial Torque Wrench(12.5–250 ft - lb) Maint Overdue
	!	CTECHL1R240A	1/4" Drive Fixed - Head Aluminum Body ControlTech™ Industrial Torque Wrench(1–20 ft - lb) Maint Overdue
	!	CTECHL1R240A	1/4" Drive Fixed - Head Aluminum Body ControlTech™ Industrial Torque Wrench(1–20 ft - lb) Maint Overdue
	!	CTECHL1R240A	1/4" Drive Fixed - Head Aluminum Body ControlTech <sup>™</sup> Industrial Torque Wrench(1–20 ft - lb) Maint Overdue
	!	CTECHL1R240A	1/4" Drive Fixed - Head Aluminum Body ControlTech <sup>™</sup> Industrial Torque Wrench(1–20 ft - lb) Maint Overdue
	!	CTECHL1R240A	1/4" Drive Fixed - Head Aluminum Body ControlTech <sup>™</sup> Industrial Torque Wrench(1–20 ft - lb) Maint Overdue



# **Main Screen Condition Control**

The other location you can find a form of the device inventory list with condition info is on the main screen of the devices. The layout of the screen formatting may be slightly different due to some displays being larger or smaller and portrait vs. landscape, however, they will all have the same basic functionality with some exceptions.

NOTE: The tool crib uses a main screen dashboard similar to the admin application and does not have a logged-out inventory list. The session based logged-in tool list will be discussed in its own separate section below.

Here are the front screens for the toolbox and the locker. Notice that they both have an area that displays a list of tools with a bar of symbol buttons, above that toggle what is shown in the list.







Notice the flag button on the condition summary bar of the screen.



This button alerts you that there is an issue with the device. Clicking this button will take you to the status screen for the device. The device can have statuses attached to it just like any other tool in the system.



Simu Toolk Top L	SimulatorToolbox36 Toolbox Simulator 36 Top Level					
Current						
8	Maintenance Overo 1/24/2025 4:14:49	due PM ()				
8	Pad Drawer/Door State 1/28/2025 1:39:46 PM ()					
	Info	! Status	Maintenance			

We can see that the device has an overdue maintenance and a bad drawer state status as well. This is one of the ways the system alerts you that there are issues that need to be addressed.

Back on the main screen, the red exclamation button on the condition summary area shows the tools with statuses assigned to them. The number on left side of the slash is the number of tools with alert statuses and the number on the right side of the slash is the total number of tools with any status (not just alert statuses).



Clicking this button will take you to the tool inventory screen with the list of tools filtered to show all tools with statuses, sorted so that alerts at the top.



ressention of the second	Inve	entory	
	Part Number	Details	
!	AW1015DHK Dwr 7	Set, Wrench, L-Shape, Hex (15 pcs. In BHK15 Metal Index) (.028" to 3/8") Maint Overdue	*
@	FAM10E Dwr 1	Socket Driver, Metric, Hex, Standard, 10 mm <i>SuperUser 1/29/2025 4:15 PM</i> Out for Repl/Rep	
	CTECHL1R240A	1/4" Drive Fixed - Head Aluminum Body ControlTech <sup>™</sup> Industrial Torque Wrench(1–20 ft - lb) Maint Pending	
	QD2R100	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 20-100 ft. lb., 3/8" drive Maint Pending	<b>_</b>
	QD3R250 Dwr 8	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 50-250 ft. lb., 1/2" drive Maint Pending	*

A white button will show the count of tools that have informational or warning level statuses. This button will only appear if the alerts button is not currently showing.





Also from the main screen condition summary, we can click the yellow tools issued button. This button has a wrench icon on it and a number which is the number of tools issued to the currently selected user. In this case it is the number of issued tools for all users.



Clicking this button will take you to the tool inventory screen with the list of tools filtered to show issued tools.

Part Number     Details       A2A     Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16" Plane Maintenance Hangar, Preston 1/24/2025 4:15 PM	
A2A Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16" Dwr 1 Plane Maintenance Hangar, Preston 1/24/2025 4:15 PM	
OEX12B Wrench, Combination, Standard Length, 3/8", 12-Point Dwr 2 SuperUser 1/29/2025 4:19 PM	
FAM10E     Socket Driver, Metric, Hex, Standard, 10 mm       Dwr 1     SuperUser 1/29/2025 4:15 PM       Out for Repl/Rep	

On the condition summary bar of the main screen there can also be a grey button with an ampersand symbol and a number. This shows when there are tools that are currently being managed out of the box, for example, a tool sent to the calibration lab. Even though these tools are issued, they aren't counted as issued tools on the issued tool button because they are accounted for in the system.





Clicking this button will take you to the tool inventory screen with the list of tools filtered to show only tools managed out of the box.

<b>1</b> 0 (10)	ventory	
Part Number	Details	
@ FAM10E	Socket Driver, Metric, Hex, Standard, 10 mm SuperUser 1/29/2025 4:15 PM Out for Repl/Rep	
	Out for Kepl/Kep	

There is also a purple button that can show up because a user did not confirm a verification when requested. Alternatively, the system can be configured so that a user must confirm that they are returning another user's issued tool. If they do not confirm this tool return, the tool will be marked with a confirm declined status and the purple button will appear. More information about verifications can be found in the Verifications document.





Devices that come equipped with a large monitor and keyboard will have a text-based search bar on the Main Screen Condition Control. This search bar will filter any tools that don't contain the string in the part number, description, storage sub-location, or issued to information.

T		Ð	Z Port	<b>BT001</b> al	Ø
<b>1</b> /	1 🥜 3				
	Part Number	Details			
!	QD2R100	Torque Wre drive Maint Overdu	ench, Adj. Click-type, I	J.S., Fixed-Ratch	net, 20-100 ft. lb., 3/8"
1	CTECH4R600A Row1	600 ft. lb. to SuperUse	orque wrench er 1/31/2025 4:12 PM		
l	PT1800AL	1" Heavy D SuperUse	uty Impact Wrench er 1/31/2025 4:12 PM		
1	WIND100	Shop Fan SuperUse	er 1/31/2025 4:12 PM		
Ton Emp	lovers with Issu	ed Tools	Recent Events		
			Time	Action	F
SuperUser		3	2/3/2025 10:46:44 AM	Session completed	
			2/3/2025 10:46:32 AM	Unauthorized Use	,
			2/3/2025 10:46:32 AM	Unauthorized Use	
			2/3/2025 10:45:20 AM	Session started	▼
			2/3/2025 10:45:20 AM	Security Camera Ir	nade i

0

When a user begins a session by logging into a device, the Main Screen Condition Control will be replaced by device specific workflow or modified to show the status of the current session. The sections below will describe the modified session display/behavior for the relevant devices.



# **ATC Toolbox/Locker Session**

When a user is logged into an ATC Toolbox/Locker, the system will filter the information to show only his tool data. This is shown by the **Me** icon.



The system provides the ability for that user to toggle between this view and the view for all users' information. To do this, click the **All Users** button.



This will switch the display to show all user tool conditions. Notice that the icon showing the current display filter shows **All Users**. To switch back the user could click the **Me** button. You can also see that there are more tools in the tool list than before. For instance, there is a tool issued to a different user than the logged in user. You can see that if the list takes up more than the whole screen, the system will automatically add scroll buttons to move up and down the list of tools to the right side of the tool list.



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# **Tool Crib Session Inventory Control**

The tool crib uses a main screen dashboard like the Admin application and does not have a logged-out inventory list. To get to the tool condition control, a user has to begin a session by scanning their badge with an attendant logged in or the crib configured for non-attendant mode.

At the beginning of the session the main screen will show the tool condition list with the same condition summary bar above it as was explained for the toolbox. There are a couple of additional features, however. Sandwiched between the condition summary bar and the tool condition list is a search bar with a field selector.



You can select the tool field on which you would like the search to be based, and then as you start typing, the list will be filtered based on the text compared to the field you selected. **NOTE: The characters are not case sensitive.** 



45 Snap-on T	rue-Crib, v:9.13.2.0128, To	ol Crib East					- 0	×
	RUE	-CRIB	SuperUs CLICK TO	t Employee Iser O COMPLETE SESSION		<b>Attendant</b> SuperUser		
Summ	ary: SuperUser							
<sup>⊉Me</sup> ∎1	<u>/</u> 2	@3	All User	Return Mode				
		P	art Number 🎽					
	Part Number	Details						
	QD2R100	Torque Wrench, Adj. Click- Fixed-Batchet, 20-100 ft, II	type, U.S., 					
			.,.,.					
SHOW	CONDITIONS AND CHAN		IPLOYEE SUMMARY					

At the bottom of the list there are two checkboxes. The **SHOW CONDITIONS AND CHANGES ONLY** checkbox will toggle between showing only the tools with a condition such as a status or a change, such as a tool being issued. If you toggle this checkbox, all tools in the device will be listed, sorted by tools with conditions and changes at the top.





Notice that even though the list was filtered for the session user, the complete list of tools in the device is shown. If we re-check the **SHOW CONDITIONS AND CHANGES ONLY** checkbox, the system returns to showing only the tools with conditions or changes filtered to the session employee.

ip-on True-Crib, v:9.13.2.0128, To	pol Crib East		- 0
RUE	-CRIB 🍃	Current Employee SuperUser CLICK TO COMPLETE SESSION	SuperUser
nmary: SuperUse	r	Beturn Mede	
<sup>Me</sup> 1 <mark>∕⁄ 2</mark>	@ 3		
	Part Num	per *	
Part Number	Details		
2 QD2R100	Torque Wrench, Adj. Click-type, U.S Fixed-Ratchet, 20-100 ft. lb., 3/8" dr	, ive	
SGD4BR	Screwdriver, Flat, Instinct <sup>™</sup> Soft Har Red, .040"	dle,	
HOW CONDITIONS AND CHA	NGES ONLY V SHOW EMPLOYEE SU	MMARY	

Now if we uncheck the **SHOW EMPLOYEE SUMMARY** checkbox, this has the same effect as if you clicked the button on the condition summary to toggle between all users and the current session user. The complete tool list will be shown sorted with the tools with condition or changes at the top.

<sup>L</sup> 5 Sna	ip-on Tri	ue-Crib, v:9.13.2.0128, Too	ol Crib East			- 0	$\times$
7		RUE	-CRIB	SuperU	LEmployee ser D COMPLETE SESSION		
	mma All ∪⊴ 13	iry: All Employ sers /121	ees 16 @ 3 Part N	}Me i 🥜 umber 🎽	Return Mode		
		Part Number	Details				
	! ⁄⁄	AT380	Impact Wrench, Air, Heavy Duty, 3/8" Drive (35-150 ft. lb.)	÷			
	ł	CTECH3FR250A	1/2" Drive Fixed - Head Aluminum Body ControlTech™ Industrial Torque Wrench(12.5– 250 ft - Ib)				
		CTECHL1R240A	1/4" Drive Fixed - Head Aluminum Body ControlTech™ Industrial Torque Wrench(1–20 ft - Ib)				
	! <mark>⁄</mark> ⁄	DBTBM10	10 mm ThunderBit® Metric High Speed Steel 135° Split Point Drill Bit	•			
		FAM11E	Socket Driver, Metric, Hex, Standard, 11 mm				
	!	QD2R1000	Torque Wrench, Adj. Click-type, U.S., Fixed-Ratchet, 200-1000	*			
Ľ	nowu	UNDITIONS AND CHAN	SHOW EMPLOTE	E SUMMARY			

Notice that the condition summary changed to show **All Users** instead of **Me**. If you either recheck the **SHOW EMPLOYEE SUMMARY** checkbox or click the **Me** button, it will toggle back to showing just the tools for the session employee.



### **Batteries**

Some of the devices in the L5 Connect<sup>™</sup> system use batteries. This document will provide a central location for all information related to managing these batteries for your L5 Connect<sup>™</sup> system.

### Battery Info and Safety Information

Information and safety data for the smart batteries used in the toolboxes and RFID cabinets can be found in the <u>Battery Information</u> document.

### **Devices with Batteries**

L5 Connect toolboxes and lockers contain internal smart batteries for their UPS and some of the boxes also come with a 6 bay battery pack of smart batteries. These systems are designed to warn you when the system is low on power and eventually shut the system down in a controlled fashion if remaining power gets to a critical point.

#### **Optical Toolbox**

The toolboxes have two battery configurations. All toolboxes Gen3 or higher have an internal UPS battery to ensure data is not lost if power is lost to the box. Some models of toolboxes also have six external swappable batteries so that the toolbox can be used in a cordless environment for up to 16 hours.

#### **RFID** Cabinets

RFID cabinets contain an internal UPS battery to ensure data is not lost if power is lost to the cabinet.

#### Domestic Portals and FlexHubs

These devices contain an internal UPS. However, the software does not display any status information related to the UPS on these devices.



### **On Screen Battery Indicators**

#### **Optical Toolbox**

The main screen of the toolbox will show the basic status of the batteries. Here is an example of a toolbox that is currently plugged into an AC power outlet with the batteries fully charged. The Green color of the batteries and the lack of a lightning bolt shows that they are fully charged. The power plug symbol to the right of the batteries signifies that the system is currently running on AC power.



Once the system is removed from AC power it will begin to discharge the batteries, starting with the UPS battery. It will discharge the UPS battery to 85% and then switch to discharging the other batteries to 85%. Once this happens it will switch to discharging the regular batteries two at a time until they are discharged. This discharge pattern is designed to help prevent batteries from losing the ability to properly discharge and recharge after being connected to AC power for a long period of time. As the batteries get lower on power the color of the battery displays will



change to highlight the level of charge in them.



Once the toolbox is plugged into a power outlet you will see the charging symbol on the batteries to let you know they are charging. The power plug symbol also returns.





If one of the batteries gets an error, you will see a warning symbol displayed on that battery.



To get more information about that error you can click on the battery display portion of the screen. This will bring up the **Battery Details** screen. You can then click on the battery with the issue to see more details about that battery.





Then you can see that this battery has a charge error and how to correct this error.



Disconnecting the box from AC power will cause the recovery process to begin.



This will drain the batteries down and should clear the charge error. The system can then be restored to AC power.



#### **RFID** Cabinet

The tool locker devices only have an internal UPS battery. The Main screen shows the power plug symbol when the system is plugged into AC power.

STEPEN	
	<b>₽</b> Ÿ
Part Number Details	

Unplugging the device from AC power will cause the main screen to show an image of the UPS battery with the color filling the battery changing and shrinking as it loses charge.





At any time, you can tap the area of the screen where the plug or battery are shown to see the battery details.





### Battery Report

The L5 Connect system provides built-in reports that will help you to monitor the status of your devices that rely on batteries. There is a device report which can tell you if any of your devices have battery errors. When you run the device report make sure that you have included the **Device Statuses** column. If this column isn't checked in the default report, you can find more information on how to customize reports in the following the following link. L5 Connect Reports

Including device statuses in this report will show you any of your devices that currently have a **Battery Error** status.

				Device			$\overline{3}$
Filtering Sticky Filters: Loca Run Time: 6/18/20	ntion = Top Level 025 2:56 PM : Cent	ral Standard Time				Auto-Refresh	Xlsx č
Oevice Serial Number	<ul> <li>Device Name</li> </ul>	Device Customer ID	Device Statuses				
Z41BJ001	Tool Box 1	Toolbox1	Bad Drawer/Door State Offline				
Z91BJ001	Z91BJ001	Z91BJ001	Battery Error	1			
Z93AU001	Z93AU001	Z93AU001	Offline	1			
Z93G5001	Z93GS001	Z93GS001	Offline	1			
Z97AT001	Z97AT001	Z97AT001	Offline	1			
Z97BJ001	Z948J001	Z948J001	Offline	1			
Z98AT001	Z98AT001	Z98AT001	Offline	1			
Z98BT001	Z988T001	Z988T001	Offline	1			
Z99AN001	Tool Crib East	EastBuildingCrib	Offline				
Z99HR001	Tool Crib West	WestBuildingCrib	Offline	1			
Z99LS001	Z99LS001	Z99L5001	Offline	1			
ZA8BT001	ZA8BT001	ZA8BT001	Hardware Error Offline				
				-			

Once you have identified that there are battery errors, you can get more information about these errors by running the **Battery** report. This report includes a great deal of information about the batteries in your devices, including a **Battery Error** column that tells you what kind of error the battery has.

$\checkmark$		3							
Filtering Sticky Filters: Location = Top Level Run Time: 6/19/2025 11:07 AM : Central Standard Time								Auto-Refresh	Xlsx v
🕑 Battery Serial Number	Battery Slot	🕑 Charge %	Battery State		Last Updated Time	Manufacturing Date	Temperature (F)	Device Serial Number	🕑 Dev
20130228xx00064	UPS 1	1	Disconnected		6/2/2025 4:31:00 PM	2/28/2013	83.39	Z91BJ001	Z91BJ001
2020010191BJ001	1	100	Connected	I: CHARGE ERROR	6/18/2025 9:33:28 PM	1/1/2020	85	Z91BJ001	Z91BJ001
2020010291BJ001	2	100	Connected		6/18/2025 9:33:28 PM	1/2/2020	85	Z91BJ001	Z91BJ001
2020010391BJ001	3	100	Connected		6/18/2025 9:33:28 PM	1/3/2020	85	Z91BJ001	Z91BJ001
2020010491BJ001	4	100	Connected		6/18/2025 9:33:28 PM	1/4/2020	85	Z91BJ001	Z91BJ001
2020010591BJ001	5	100	Connected		6/18/2025 9:33:28 PM	1/5/2020	85	Z91BJ001	Z91BJ001
2020010691BJ001	6	100	Connected		6/18/2025 9:33:28 PM	1/6/2020	85	Z91BJ001	Z91BJ001
2020011191BJ001	UPS 1	100	Connected		6/18/2025 9:33:28 PM	1/11/2020	85	Z91BJ001	Z91BJ001
¢									

The types of errors you could potentially have for a battery are **!: CHARGE ERROR**, **!: POWER FAULT**, or **!: BATTERY FAILED**. If you want to filter the report to only show batteries with an error, just click the **Filter** pull down button and enter "!:" into the text box.

Battery									3
Filtering Sticky Filters: Location Run Time: 6/19/202	on = Top Level 5 11:07 AM : Cer	ntral Standard	Time					Auto-Refresh	Xlsx ×
⊙ Battery Serial Number	<ul> <li>Battery Slot</li> </ul>	⊙ Charge %	⊘ Battery State	Battery Error	Last Updated Time	Manufacturing Date	Temperature (F)	Device Serial Number	r 🕑 Dev
2020010191BJ001 1		100	Connected	I: CHARGE ERROR	6/18/2025 9:33:28 PM	1/1/2020	85	Z91BJ001	Z91BJ001
×.									



### **Battery Subscriptions**

The L5 Connect system provides ways for you to regularly monitor the state of your batteries by using subscriptions. We recommend monitoring your batteries closely to maintain their health and functionality.

#### **Status Notifications**

You can configure the L5 Connect system to alert you with a text message or email when a **Battery Error** status occurs. To make that work, you would need the contact information configured in your employee profile, your L5 Connect system configured to support an SMTP mail server (for email delivery), and then the notification itself configured. Notification set up information can be found in the <u>Notifications</u> document.

#### Scheduled reports

You can also configure the L5 Connect system to schedule the previously mentioned device and battery reports to be run and sent to you on a periodic basis. Then all you have to do is check your email to see a report of the current state of your devices and their batteries. Scheduled report setup information can be found in the <u>Scheduled Reports</u> document.

### **Best Practices for Battery Maintenance**

The <u>Battery Maintenance Best Practices</u> document contains the best practices for keeping your batteries performing at peak performance.



### **Error Codes**

#### 124-1443 (DATA ERROR)

- Battery is unable to communicate
- Caused by poor connection to battery OR a **BATTERY FAILED** that was never removed from the device
- Poor connection can be addressed mechanically.
  - Eject the battery and verify the contacts are clean and undamaged.
  - Reinsert the battery.
  - Verify the securing tab is seated in the slot on top of the battery bay
  - o If the error persists, contact Snap-on Technical Support for additional information.
    - Please provide the following information.
      - Toolbox serial number
      - Battery serial number
      - A description of when the error started and how often it occurs

#### 125-1443 (CHARGE ERROR)

- Battery is unable to charge
- Caused by not being discharged for long periods of time (common in devices always connected to AC Power)
- An audio message will play regularly when a CHARGE ERROR has been detected
- Recovery Process
  - Disconnect from AC power
  - Wait until all CHARGE ERRORS have been cleared
  - Continue to wait until all batteries have been discharged to a level of 85% or below
  - Reconnect AC power

#### 126-1443 (BATTERY FAILED)

- Battery is unable to discharge or charge
- Caused by an uncorrected CHARGE ERROR (see above)
- Battery is most likely not recoverable and will need to be replaced.

#### 134-1443 (NEEDS CHARGE)

- Battery charge level is extremely low.
- Caused by long shelf storage durations.
- Battery should recover through normal charging process.

#### **POWER FAULT**

- Battery is unable to discharge
- Caused by charger safety shutoff (most likely due to current spike)
- Contact Snap-on Technical Support for additional information.


- Please provide the following information.
  - Toolbox serial number
  - Battery serial number
  - A description of when the error started and how often it occurs

### DEVICE WILL NOT POWER ON

• No lights or sounds visible

0

•

- Possibly caused by POWER FAULT on all battery circuits
  - Contact Snap-on Technical Support for additional information.
    - Please provide the following information.
      - Toolbox serial number
      - Battery serial number
      - A description of when the error started and how often it occurs

### BATTERY DISPLAY BLANK

• No battery information visible on front or battery details screen

Emper."			Battery Details	
<u>13/j19 /7 ?1</u> @10	80			-
Part Number Details	0			
1 5500005941-PRATT Square Box Hernandez, Ray, 10/20/2023 10:41 Dari 1 Cat. Reg. Wrong Teal				
1 S500005986-PRATT Dorr 1 Dorr 1 Weinig tool Confirm		-	Status	-
Source Box Bradley, Matthew, Quality Chine Ir Dev 1 Cat Res, Wring Tool			Charge Serial Number	Start: Battery Replace Mode
SS00005973-PRATT Date Castler, Robert D., Snap on ATC T	S U	Ма	sufacturing Date	

- Contact Snap-on Technical Support for additional information.
  - Please provide the following information.
    - Toolbox serial number
    - Battery serial number
    - A description of when the error started and how often it occurs



ATC Toolbox



ATC OP Guide



# SAFETY INFORMATION

For your safety, read this manual thoroughly before the installation of the equipment.

Installation is intended to be performed by properly trained technicians. The safety messages presented here are reminders to the installer to exercise extreme caution during installation and training on the system.

There are many variations in procedures, techniques, tools, and parts for installation due to varied shop configurations.

Because of the vast versatility of installation, the manufacturer cannot possibly anticipate or provide advice or safety messages to cover every situation. It is the technician's responsibility to be knowledgeable of the equipment to be installed. It is essential to use proper service methods and perform installation in an appropriate and acceptable manner that does not endanger your safety, the safety of others in the work area, the end-user, or the equipment being serviced.

It is assumed that, prior to the installation of the system, the operator has a thorough understanding of Automated Tool Control Systems in general. In addition, it is assumed they have the proper hand and power tools necessary to perform the installation, operation, and training in a safe manner.

These safety precautions should always be followed, including:

- 1. Read all instructions.
- 2. Care must be taken as burns can occur from touching hot parts.
- 3. Do not operate power tools or equipment with a damaged power cord or if the equipment has been dropped or damaged until it has been examined by a qualified serviceman.
- 4. Do not let the cord hang over the edge of the table, bench, or counter or come in contact with hot manifolds or moving fan blades.
- 5. If an extension cord is necessary, a cable with a current rating equal to or more than that of the equipment should be used. Cords rated for less than the equipment may overheat. Care should be taken to arrange the cable so that it will not be tripped over or pulled.
- 6. Always unplug equipment from the electrical outlet when not in use. Never use the cord to pull the plug from the outlet. Grasp plug and pull to disconnect.
- 7. Let equipment cool entirely before putting it away. Loop cord loosely around equipment when storing.
- 8. To reduce the risk of fire, do not operate equipment in the vicinity of open containers of flammable liquids, such as gasoline.
- 9. Adequate ventilation should be provided when working on operating internal combustion engines.
- 10. Keep hair, loose clothing, fingers, and all parts of the body away from moving parts.
- 11. To reduce the risk of electrical shock, do not use it on wet surfaces or exposed to rain.
- 12. Use the device only as described in this manual. Use only the manufacturer's recommended attachments.
- 13. ALWAYS WEAR SAFETY GLASSES. Everyday eyeglasses only have impact-resistant lenses. They are NOT safety glasses.
- 14. Know and understand the proper operating procedures for all power tools used.
- 15. If the equipment is used in a manner not specified by the manufacturer, the protection provided by the equipment may be impaired.
- 16. Danger: Mirror could have sharp edges, be careful of cuts along the edge of the glass when cleaning !!!

#### IMPORTANT!! SAVE THESE INSTRUCTIONS DO NOT DISCARD!!





#### SAFETY INSTRUCTIONS IMPORTANT!! SAVE THESE INSTRUCTIONS



#### Risk of electrical shock.

- Do not operate equipment with a damaged power cord or if the equipment has been dropped or damaged until it has been examined by a qualified service person.
  - If an extension cord is necessary, a cable with a current rating equal to or greater than that of the equipment should be used. Lines rated for less present than the equipment can overheat.
- Unplug equipment from the electrical outlet when not in use. Never use the cord to pull the
  plug from the outlet. Grasp plug and pull to disconnect.
- Do not expose the equipment to rain. Do not use it on wet surfaces.
- Plug the unit into the correct power supply.
- Do not remove or bypass the grounding pin.
- Do not use a replacement main power cord that does not meet the power rating of the original cable. SJTW 18/3 105°C, 10', 10A/125-240~VAC

Contact with high voltages can cause death or severe injury.

#### Risk of electrical shock. High voltages are present within the console unit. • Service on the unit must be performed by qualified personnel.



- Do not open any part of the control shelf other than the noted areas.
- Turn the power switch off and unplug the unit before servicing.
- Contact with high voltages can cause death or severe injury.

Units can tip or strike you. Do not open more

٠

- Do not open more than one loaded drawer at a time.
  - Do not open more than one loaded drawer at a tin
     Keep children away
  - Close lid and lock drawers and doors before moving.
  - Apply brakes on locking casters when not moving unit.
  - Do not step in or on drawers.
  - Secure units together with fasteners.
  - Read the instruction manual.

Tipping of storage unit or unit striking you can cause injury.

WARNING Unit's edges can cut or pinch.

- Do not pull unit; push to move.
  - Wear gloves when lifting by edges.

Keep feet and fingers clear of edges when stacking hanging or moving units.
 Unit's edges can cause injury.

#### Do not dispose a landfill.

- · The unit contains electronics that must be disposed of within the bounds of EN 50149.
- Dispose of lithium-ion batteries (where applicable) in accordance with local laws.
- For more information, call 1-800-424-9300 for North America or 1-703-527-3887 for International.

#### SAVE THESE INSTRUCTIONS

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# Device Overview Optical Toolbox

The ATC Optical Toolbox works at the speed you do. A user opens the box, gets the tools, and goes to work. Other systems require additional steps to scan or log activity. We do it automatically, so you don't waste time, and you don't need to depend on other measures to ensure accurate results.

#### Advanced Technology that Makes Tracking Tools Simple.

With advanced digital imaging technology and proprietary software, the Toolbox scans the tool drawer and records which tools are removed and replaced in real-time. So, you know where everything is always at without slowing the technicians for even a second. The system is also aware of broken tools, allowing you to replace or repair them right away. It's tool control that works hard to keep technicians working at their best.

#### **Features and Benefits**

- No individual tool scanning required
- No RFID tags to install or replace
- No limit on tool size If it fits in the drawer, it works
- Intuitive touchscreen interface
- Audible voice confirmation of tool removal and replacement
- Automatic locking
- Audio feedback on issued and returned tools and alerts
- 10.1" Widescreen 16:9 LED Resistive touchscreen
- Optional Black Powder Coated Paint top vs. Stainless Steel
- Dual wireless antennas for improved connectivity
- Hardware 64-bit processors with 8GB RAM
- Uninterruptable power supply 30 minutes of backup power

#### AC and Rechargeable Platforms available:

- 36" single bank roll cab, approximate capacity 450 tools
- 54" single bank roll cab, approximate capacity 750 tools
- 6, 7, and 8 Drawer mobile and Stationary
- Custom drawer configurations available
- Stainless or Black Powder coated tops

#### **Features and Specifications**

- One year Manufacturer's warranty
- One, Two, and Three-year Manufacturers Contracts Available
- Unlimited number of assigned users
- Networking through Ethernet or wireless



### **RFID** Cabinet

The ATC RFID Cabinet provides automated asset tracking to irregularly shaped items, like extension cords, tools kitted in plastic or fabric carrying cases, and personal protective equipment. In addition, the RFID Cabinet makes tracking large and awkward-sized tools and assets easy.

#### **Features and Benefits**

- The RFID Cabinet powered by advanced RFID technology and proprietary software can track Critical Industry workplace assets in real-time.
- Track serialized items like torque wrenches, multi-meters, micrometers, and more.
- Heavy-duty metal shelves with foam bear the weight of larger tools and assets
- Onboard AC power strip allows for secure recharging and storage of power tools
- Intuitive touchscreen interface
- Audible voice confirmation of tool removal and replacement
- Automatic locking
- Audio feedback on issued and returned tools and alerts
- 10.1" Widescreen 16:9 LED Resistive touchscreen
- Dual wireless antennas for improved connectivity
- Hardware 64-bit processors with 8GB RAM
- Uninterruptable power supply 30 minutes of backup power

#### Specifications

- One year Manufacturer's warranty
- One, Two, and Three-year Manufacturers Contracts Available
- Unlimited number of assigned users
- Networking through Ethernet or wireless
- Available in a variety of colors



## Maintenance Guide

### Introduction

Thank you for your purchase of a L5 Connect<sup>™</sup> ATC Device. This guide will inform you of basic upkeep and maintenance actions used to keep your ATC device functioning at peak performance.

This guide's first section will introduce you to your device and some essential operation and maintenance tips to keep your Device in working order for many years to come.

If at any time you require technical support for your ATC device, you can contact Snap-on® Technical Support at:

E-mail: INDPROSERVICES@snapon.com

Our technical support agents are standing by, ready to assist you with any questions or issues you may have. Once again, thank you for your purchase, and welcome to the L5 Connect<sup>™</sup> family.

### **General Instructions**

Regular operation requires common sense care of the L5 Connect<sup>™</sup> Device. Below are some specific dos and don'ts to follow.

Do	Don't
<ul> <li>Close drawers in a normal fashion</li> </ul>	Slam drawers closed
Clean tools before replacing into foam cutouts	Place objects into drawers that do not have cutouts
<ul> <li>Keep toolbox clean</li> </ul>	Allow the foam to get dirty
Respect the ATC system for what it is intended to do for you	Use in the rain or in wet conditions
• When touching the touch screen do so with clean hands	Reach inside drawer to retrieve tools beyond camera view
<ul> <li>Keep touch screen clean</li> </ul>	<ul> <li>Place tools directly onto foam, place tools in their cutout</li> </ul>
Use only your fingers on the touch screen	Modify cutouts
<ul> <li>Keep box locked when not in use</li> </ul>	<ul> <li>Plug unit into a voltage source other than that specified</li> </ul>
<ul> <li>Logout when not present at the box</li> </ul>	Strike or beat on box
Lock wheels when in use	Attempt to open the box top
<ul> <li>Make sure all drawers are closed before moving box</li> </ul>	Plug any device into box USB ports
<ul> <li>Only move box with attached handle</li> </ul>	Step onto or into open drawers
Use only Snap-on approved RFID tags and follow install instructions in the L5 RFID Tag catalog	• Turn off power switch before shutting down the ATC system through the touch screen interface first
	<ul> <li>Expose toolbox to direct sunlight, the toolbox should not be positioned in such a way that sunlight can hit the drawers. Sunlight may cause incorrect drawer scans which can result in Incorrect or Wrong tool errors.</li> </ul>



## **Device Specific Maintenance**

### ATC Toolbox

The cameras, mirror and the dot strips in the drawers are the functional components of the ATC toolbox imaging system.

#### Inspect and Clean the Mirror

- The mirror is positioned at 45° above the front of the top drawer. To visually inspect the mirror, view it from underneath and look for grease or oil smears, dirt or dust. In older units, look for etching and defects in the surface.
- You may need to view it from both left and right side.
- Alternatively, mirror defects can be viewed in the images called up in the calibration routine.

#### Note: The ATC mirror is a front surface mirror and requires special care when cleaning.

#### Cleaning

- If the mirror surface is dusty, use a microfiber cloth with water, otherwise clean the mirror using only a microfiber lens cleaning cloth.
- To remove grease or oil, wipe excess material from the surface with a soft cloth, then clean the mirror with a soft microfiber cloth and Isopropyl Alcohol
- Note: Use Isopropyl Alcohol sparingly. Cleaning too frequently with ISO Alcohol can result in damage to the reflective surface
- DO NOT use any other chemical or glass cleaner on the mirror. It will damage the mirror and may void the warranty!

#### **Inspect and Clean Dot Strips**

- Use a flashlight to periodically inspect all dot strips for presence of shiny spots and defects caused by contaminants or surface damage. Shiny defects may saturate the camera pixels and interfere with proper operation of the system.
- Ensure there are no foreign materials or obstructions extending onto the strips.
- Use a soft cloth and mild cleaning solution to wipe down dot strips inside each drawer.

#### Care and Cleaning of Tool Foam and Base Layer

- Clean all objects prior to returning them to the appropriate silhouette.
  - If the items are not cleaned, oil, grease, and other contaminants are transferred from the item to the blue foam edge and the bottom yellow layer.
  - The presence and absence determination depends largely on the yellow color in the base layer. If it changes too much due to transferred contaminants, it will affect the performance of the ATC imaging system.
- Periodically clean the blue foam silhouette edges and bottom yellow layer with a commercially available detergent cleaner / degreaser.
- Note that the hex bit pockets are particularly susceptible to contamination and color change. If your ATC system issues excessive wrong tool warnings on hex bits, Snap-on offers the kit HEXPLUGS100, a package of 100 yellow plugs specifically designed to fit into the bottom of the hex bit silhouette.



#### Inspecting LED's

#### The LED's are very bright, do not stare at them for extended length of time

ATC units assembled prior to April 2023 have a set of LED's in the front and two sets of LED's mounted on the camera beam in the rear. For units assembled from April 2023 and after, all LED's are mounted on the camera beam.

- Use the mirror to inspect the rear LED's by viewing them much the same as inspecting the mirror.
- Look for burned out or missing LED's
  - You may need to view it from both left and right side.
- To inspect the front LED's, open a lower drawer and the LED's illuminating the lower drawers will come light up.

In all cases, **look for dead or burned-out LED's**. If any LED's are out replace the LED strips.

### ATC RFID Locker

#### **RFID Tag Installation - BEST PRACTICES**

The proper performance of your Snap-on RFID Locker depends on many factors. One of the most important of these is the proper mounting of the Tag to the asset. Best Practices for correctly mounting tags on tools is covered in the document **"TL5331J00B4 RFID Tag Catalog."** 

A copy of the RFID Tag Catalog is included in the literature pack of each locker.

#### **RFID Tag Troubleshooting guide**

your	Snap-on ATC Locker is experiencing problems reading a tag, here are some suggested diagnostic
1)	Check that the tax is the second time for the tax is a philad meta-
2)	Check that the tag is the correct type for the tool of object material. Check that "On metal" tags are mounted correctly on the metal tool or object. The back surface of the tag should be in contact with and parallel to the mounting surface of the tool or object. Only a thin layer of adhesive should be evident.
3)	RFID waveforms cannot pass through moisture. Confirm the adhesive or epoxy has fully cured. See the adhesive or epoxy manufacturer's specifications and confirm the material has had adequate cure time. Typical cure times are at least 24 hours.
4)	Check for proper application of the adhesive or epoxy. An overly thick layer of adhesive or epoxy can negatively impact RFID waveforms.
5)	Check for proper application of heat shrink tubing or silicon tape. Multiple layers of heat shrink or excessive layers of silicon tape negatively affect RFID waveforms.
6)	Check to see that only a single method of tag protection is used. Use only heat shrink tubing or silicone tape or epoxy. Combining any of these three methods of tag protection negatively impacts RFID waveforms.
faddit	ional diagnostics are necessary, follows these steps:
1)	Check the performance of the tag with a hand held RFID scanner.
2)	Check the position of the tag in the locker. It should be at least $\chi''$ away from any metal surfaces or objects. If necessary, move the object to ensure adequate spacing from metal surfaces.
3)	If possible, and without damaging the tag, move the tag to a different location on the object.
4)	Replace the tag with an identical tag.
5)	Replace the tag with a different type or larger tag.
	LEVEL SATC
	Tool Control System

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#### **RFID Antenna test**

- A process to check operation of the RFID antennas is available to administrator and maintenance users in the Maintenance menu.
- Call Technical Support at 1-800-940-2397 to obtain procedures to access the Antenna test function.

### All Devices

#### **LED Touchscreen Display**

- If the LED display screen requires cleaning, spray window cleaner on a soft lint-free cloth and wipe down, making sure no liquids drip into the edges of the screen. Do not spray any cleaner directly onto the touch screen.
- •

#### **Recommended Monthly Battery Maintenance**

- Inspect the Battery Details screen and address any detected battery errors.
- Models Z1x, Z3x, Z5x, and Z7x
  - Disconnect from AC power until all batteries (including the internal UPS battery if present) are at 85% or lower.
    - This should take approximately 4 hours to complete.
  - Connect to AC power until all batteries (including the internal UPS battery if present) are at 95% or higher
    - This should take approximately 4 hours to complete.
  - If any batteries fail to discharge to 85% or fail to charge to 95% please contact Snap-on Technical Support for assistance.
- Models Z4x, Z6x, and Z8x
  - o Disconnect from AC power until the internal UPS battery is at 85% or lower.
    - This should take approximately 30 minutes to complete.
  - o Connect to AC power until the internal UPS battery is at 95% or higher
    - This should take approximately 30 minutes to complete.
  - If the internal UPS battery fails to discharge to 85% or fails to charge to 95% please contact Snapon Technical Support for assistance.



## **Electrical Specifications**

Connect to a grounded (Earthed) electrical outlet using a detachable cord set. The electrical outlet must be readily accessible. The maximum cord length is 3 meters.

### **Optical Toolbox**

- Without External Batteries
  - AC Input: 100-240~, 3A Max, 60-50 Hz (+10%/-6%), 1-Phase
- With External Batteries
  - AC input: 100-240~, 5-3A, 60-5 Hz.(+10%/-6%), 1-Phase.

### **RFID** Cabinet

NOTE: RFID Cabinet current rating includes customer devices connected to internal power outlets

- Americas / Japan:
  - AC Input: 100-120~, 15A, 60 Hz (+10%/-6%), 1-Phase.
- EU / Asia / Oceania
  - o AC Input: 220-240, 10A, 50 Hz (+10%/-6%), 1-Phase

### Internal Power Supply

• AC Input: 100-240~, 4-2A, 60-50 Hz. 1-Phase

## **Environmental Operating Specifications:**

- Indoor Use Only
- Temperature Range: 0-50 °C
- Humidity Range: Maximum relative humidity 80% for temperatures up to 31 °C, decreasing linearly to 50% relative humidity at 40 °C
- Altitude Range: 0-2000 Meters
- Pollution Degree: 2
- Overvoltage Category: II
- Ingress Protection: IP20

### Sound Pressure Level:

- On the drawer (operator) side @ 1 meter distance = 59.4 dBA
- On the back side @ 1 meter distance = 62.5 DBA



# **Dimensions and Weight**

- 54" Toolbox
  - o 54.14" Wide
  - $\circ$  ~~ 33.04" Front to Back
  - o 57.80" Tall
  - $\circ$  ~ 550 lbs. (No Tools)
- 36" Toolbox
  - o 35.50" Wide
  - $\circ$  ~~ 33.04" Front to Back
  - o 56.30" Tall
  - $\circ$   $\,$  450 lbs. (No Tools
- RFID Locker
  - o 36" Wide
    - $\circ$  ~~ 33.11" Front to Back
    - o 75.23" Tall
    - $\circ$  ~ 550 lbs. (No Tools)



## **Battery Info**



! WARNING !

Only use Snap-on battery P/N: 2-04805A.

The use of any other battery will void the manufacturer's warranty and could potentially damage the unit and/or inflict bodily harm. Batteries should only be charged by placing the batteries in a toolbox with the AC plugged into an electrical outlet or with an approved Snap-on Battery Charger model L5A0298J21A.

#### **Battery Classification and Type**

4.1 Battery Classification - SANYO Lithium-Ion Battery

4.2 Battery Type - 4UR18650A-3

Items		Specifications	Notes		
5.1 Rated Capacity (Minimum)	0	5850 mAh	1290mA discharge at 20° C		
5.2 Nominal Capacity (Minimum)		6000 mAh	1290mA discharge at 25° C		
5.3 Nominal Capacity (Typical)		6300 mAh	Reference only		
5.4 Nominal Voltage		14.4V	1290mA discharge at 25° C		
5.5 Discharge End Voltage		12.0V			
5.6 Charging Current (Std.)	1	3.0V	0 ~ +45° C		
5.7 Charging Voltage		16.44 +0.12/-0.12V			
5.8 Charging Time (Std.)		3.0 hours	Approx		
5.9 Continuous Discharge (Max)		6.0A	0 ~ +60° C		
5.10 Internal Resistance		less than 160Ω	AC Impedance 1 kHz		
5.11 Weight		less than 920 g	12		
5.12 Operating Temperature	Charge	0 ~ +45° C	3.6		
	Discharge	-20 ~ +60° C	a		
5.13 Storing Conditions	less than 1 month	-20 ~ +50° C	Percentage of recoverable		
	less than 3 months	-20 ~ +40° C	capacity 80% *		
	less than 1 year	-20 ~ +20° C			

\*Percentage of recoverable capacity = (Discharge time after storage / Initial discharging time) x 100. The discharging time is measured by the discharge current of 1290mA until 12.0V of end voltage after the battery is fully charged at 25° C.



## **Battery Safety Instructions**

### **Prohibited Instructions**

The battery contains flammable objects such as organic solvents. If the battery is mishandled, it may cause fire, smoke, or an explosion, and the battery's functionality will be seriously damaged. Please read and check the following prohibited actions.



!Danger!

#### Immersion

"Do not immerse the battery in a liquid such as water, seawater, or soda." If the protection circuit in the battery is exposed to liquid, the battery cannot be protected and may catch on fire, smoke, explode, or generate heat by the unexpected electrical load.

#### **High temperature**

"Do not use or place the battery near fire, a heater, or a high temperature (more than 80°c)." The battery's polyolefin separator may get damaged from the heat and could cause an internal short circuit. This may cause the battery to catch on fire, smoke, explode, or cause heat generation.

#### Charger and charge condition

"Do not use unauthorized chargers."

If the battery is charged under unacceptable conditions (for example: outside of restricted temperature ranges, overvoltage, or over current with unauthorized chargers), the battery may catch on fire, smoke, explode, or generate heat.

#### **Reverse polarity**

#### "Do not force a reverse-charge or a reverse-connection."

The battery has the correct polarity. If the battery doesn't fit easily, please check the battery's orientation and do not force it into the battery compartment. If the battery is forced to attach to a Device with reversed polarity, the battery may catch on fire, smoke, explode, or generate heat.

#### **Direct connection**

"Do not connect the battery with ac plug (outlet) or car plugs."

The battery requires a specific charger. If the battery connects with the outlet directly, the battery may catch on fire, smoke, explode, or generate heat.



#### Inappropriate use with other equipment

"Do not adapt the battery to unspecified applications."

If the battery is used for unspecified applications or systems, the battery may get damaged or catch on fire, smoke, explode, or generate heat.

#### Incineration and heat

"Please keep the battery away from heat and fire."

The battery materials will get damaged and may catch on fire, smoke, explode, or generate heat.

#### Short-circuit

"Do not apply a short-circuit. "

Do not connect positive (+) and negative (-) terminals with conductive material. Do not carry or store the battery with metal objects (such as wire, necklace, or hairpins). If the battery is in a short circuit, an excessively large current will flow and may catch on fire, smoke, explode, or generate heat.

#### Impact

#### "Avoid unnecessary impact to the battery."

An unnecessary impact may cause the battery to leak, generate heat, smoke, catch on fire or explode. Also, the protection circuit may break, and that will lose the function of the battery's protection system.

#### Penetration

"Do not penetrate with a nail or strike with a hammer."

The battery cell may get destroyed or damaged. And the battery's protection circuit may get damaged and cause an internal short-circuit. Additionally, the battery may catch on fire, smoke, explode, or generate heat.

#### Soldering

#### "Do not directly solder the battery."

The insulator could melt, or the gas release vent might get damaged from the heat. Additionally, the battery may catch on fire, smoke, explode, or generate heat.

#### **Disassemble and reconstruction**

"Do not disassemble the battery."

If the protection circuit gets damaged, the battery will not be protected. Then, the battery may catch on fire, smoke, explode, or generate heat.

#### Charge near high temperatures

"Do not charge the battery near high temperatures."

If the battery is charged near high temperatures, the battery may not be able to charge due to the activation of the protection circuit. In these conditions, the protection circuit may break, and the battery may catch on fire, smoke, explode, or generate heat.

#### **! WARNING !**

#### Ingestion

"Keep away from infants."

The battery should be kept away from infants. In case of swallowing the battery, see a doctor immediately.

#### Storing

"Do not put the battery in the microwave or other cooking appliances." The battery may catch on fire, smoke, explode, or generate heat due to the heat or the electrical impact from the microwave.

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#### Mixed-use

"Do not mix the battery with other batteries."

The battery should not be used with other batteries having a different capacity, chemistry, or manufacturer. Do not connect with other batteries or mix with other batteries. The battery may catch on fire, smoke, explode, or generate heat.

#### Rust, changing color, and deformities

"Do not use abnormal batteries."

Please stop using the battery if there are noticeable abnormalities such as abnormal smell, heat, deformities, or discoloration. The battery may have a defect and may catch fire, smoke, generate heat or explode if used continuously.

#### **Charging time**

"Stop charging if the charging process cannot be finished."

If the battery cannot finish the charging process within the specified time, please stop the charging process. The battery may catch on fire, smoke, explode, or generate heat.

#### Leakage

"Do not use a leaking battery near flames."

If the battery or liquid leaking from the battery has a pungent odor, the battery should be kept away from flames. The battery may ignite and explode.

#### "Do not touch a leaking battery."

If the liquid leaking from the battery gets into the eyes, it will cause significant damage. If the leaking liquid gets into your eyes, please flush your eyes immediately with pure water. Please consult a physician immediately. If the liquid remains in the eyes, it will cause significant damage.

#### Transport

*"Pack the battery tightly during transport."* To prevent short-circuit or damages, please tightly pack the battery into a case or a carton box.

#### ! CAUTION !

#### Use under direct sunlight

Do not use or leave the battery in excessive heat, such as in a car under direct sunlight. The battery may catch on fire, smoke, explode, or generate heat. Also, it might also deteriorate the battery's characteristics and life.

#### Static electricity

The battery pack has a protection circuit. Do not use the battery where it generates static electricity (more than 100V) that might damage the protection circuit. If the protection circuit is broken, the battery may catch on fire, smoke, explode, or generate heat.

#### Charging temperature range

The charging temperature range is regulated between 0°c and 45°c. Do not charge the battery out of the specified temperature range. Otherwise, it may cause heat generation, leakage, or serious damage. Also, it might cause deterioration of the battery's characteristics and battery life.

#### Manual

Please read the manual before use. Please save the manual for future reference.



#### Charging method

Please read the charger's manual for the proper charging method.

#### First-time use

Please contact the supplier if the battery has an unusual odor, heat generation, or rust during the initial use.

#### Use by children

Parents must explain how to use the system and the battery. Please check back periodically to ensure children are using the system and the battery correctly.

#### Inflammable materials

Please keep the battery away from flammable materials during the charge and the discharge. It may catch on fire, smoke, explode, or generate heat.

#### Leakage

If an electrolyte leak from the battery comes into contact with the skin or clothes, immediately flush it with water. Otherwise, it may cause skin irritation.

#### Insulation

If lead wires or metal objects come out from the battery, please seal, and insulate them completely. Otherwise, the battery may cause a short circuit and catch on fire, smoke, explode, or generate heat.

#### Recycle

Please recycle the battery according to local rules or regulations after use.



# ATC Toolbox Basic Operation Issue & Return

This document will cover basic operation of the ATC Toolbox. The ATC Toolbox is designed for ease of use and quick response. The following is the standard workflow for issuing and returning tools from an ATC Toolbox.

## Issue

1. Wave your badge near the card reader on the front of the toolbox. If you have permission to access this box, it will log you in and unlock.

<u>Ingon</u>	SuperUser, SUPERUSER
©™e ✓	
Part Number Details	

2. Select the drawer that contains the tool you wish to retrieve and open it. Once opened, find the tool you want and take it out of its pocket. All the while the system will display the current drawer open onscreen.





3. Once you have retrieved your tool, close the drawer, and the system will issue the tool to you.



4. You can tap the screen to clear the summary. To log out, tap the User frame in the top right corner of the screen.





# Return

- 1. To return a tool, you will follow a similar process. First wave your badge near the card reader on the front of the toolbox. If you have permission to access this box, it will log you in and unlock.
- 2. When the system logs you in, the screen displays a list of tools issued to you and their status. It will also show the drawer from which the tool came from.



To return the issued tool, open the drawer it belongs to, the screen displays an image of the drawer, and the tool's assigned pocket is outlined with a blinking box.







3. Place the tool in its assigned pocket, then close the drawer. A summary of the transaction will display on the screen.



4. Tap the summary to clear it, then tap the user frame to log out.





# Returning Current Employee's Tools

Multiple Unique Choices (Tool Status, Customer ID, etc.)

If you have multiple instances of the same tool issued to you, and one of them has something that makes it different, like a status, the system will need an employee to confirm which tool is being returned.



Since one has a status, these two tools are no longer interchangeable, and the system needs more information to handle the situation. When you return one of these tools you will be prompted with the following screen asking which of the tools you are returning.





If you select one of the tools in the list that tool will be returned as normal. If you select **Don't Know**, the system will make its best guess at which tool should be returned and return that tool. It will also mark the drawer with a purple color to show that you have a tool in the drawer that needs confirmation.



If you have not logged out yet, you can reopen the drawer and remove the tool, and the system will return to the state where you have both tools issued.





If you log out with the tool still in the box in a returned state with the purple notification that the system still needs clarification, the system will set a **Needs Confirmed** status on this tool and the purple color will remain to show this status.

5 [1/	<u>זר</u> קע 12 <mark>% 1</mark>	2 <b>77</b> 8 <sup>®</sup>		<b>ÖÖÖÖ</b> ÖÖ	
	Part Number	Details	Ĩ	0	
!	<b>VGP12406</b> Dwr 6	Pliers, Locking, C-Clamp, Standard Tip, 6" Confirm			
S.	VGP12406 Dwr 6	Pliers, Locking, C-Clamp, Standard Tip, 6" Smith, John J. 3/27/2025 4:24 PM Cal. Req.			
				C S	6

Clearing this status will require someone with the **Needs Confirmed Clear** permission in their profile. The built-in profiles, **Maintenance** and **Administrator** both have this permission.

NOTE: Tools with ZoomID tags can be individually identified by the system so the system would not need to prompt a user for clarification.



### All Non-Unique Choices

Sometimes you may have multiple instances of the same tool type in a drawer issued all to you.

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	Part Number	Details	°
<b>S</b>	VGP12406 Dwr 6	Pliers, Locking, C-Clamp, Standard Tip, 6" Smith, John J. 3/27/2025 4:24 PM	
e de la compañía de	VGP12406 Dwr 6	Pliers, Locking, C-Clamp, Standard Tip, 6" SuperUser 3/27/2025 4:25 PM	
			<u> </u>

If you have multiple instances of the same tool and they have no unique characteristics, the system will just pick one of them and return it without a prompt.

**NOTE:** The system will always assume that you are returning the tools that are currently issued to you. This is true even if you return the tool to a pocket different from the pocket the tool was issued from. (Assuming that both pockets hold a tool of the same Master Tool type.)

## Returning Other Employee's Tools

The ATC system allows employees to return tools that were issued to other employees. However, the return behaviors are slightly different for this use case.

### Multiple Unique Choices (Issued To, Tool Status, Customer ID, etc.)

When there are multiple instances of a Master Tool type issued that are unique, the system will need to prompt the user to select which tool(s) are being returned and to where. This might be because otherwise identical tools are checked out to multiple other users, or because one of the tools has a status set on it.



Here is an example of two tools issued to different users.

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	Part Number	Details	ſ	°
<b>S</b>	<b>VGP12406</b> Dwr 6	Pliers, Locking, C-Clamp, Standard Tip, 6" SuperUser 4/3/2025 10:41 AM Cal. Req.		
S	VGP12406 Dwr 6	Pliers, Locking, C-Clamp, Standard Tip, 6" Smith, John J. 4/3/2025 10:48 AM		

If a third user tries to return one of these tools, the system needs to prompt him to determine for which user he is returning the tool.



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He would then need to select the user to let the system know which tool to return. If he chooses the Don't Know/Cancel button and leaves the tool in the drawer and logs out, the system will mark the tool with a Needs Confirmed status as discussed earlier in the document.

### All Non-Unique Choices

When you return a tool that is currently issued to another user with no other unique choices, the system will (by default) return the tool just like if the tool was issued to you. However, the device can be forced to prompt the employee requesting confirmation that they are returning another employee's tools. See the Force Prompt to Check in Another Employee's Tools section below for more details.

### Force Prompt to Check in Another Employee's Tools

An employee may accidentally return their tool to an incorrect device (different from the device it was issued from). A prompt to the returning employee could help them realize and correct their mistake. If the Prompt to check in another user's tools option is enabled, the "incorrect" box can detect and report that its issued tool is issued to an employee different from the current user.



Are you returning tools for Smith, John J.?



a x

This feature can be found by logging into the Admin application and going to the **Locations** tab.

STITI	7		Top Level Change Current Location											Click to logout		
			Dashbo	ard Loc	ations	Tools	Tool States	Employee	s	Groups	Histor	y F	Reports	Settings		
		Device Status	- 🚺	<mark>% 3</mark> 🗆 A	tems	Alerts:			Wor	rk Location	Status	<b>S</b>	1 🗆 Hide O	IK Items		Alerts:
System Status         Filter           Devices Online :         1           Devices Offline :         11           Tools Issued :         15           Users with Tools Issued :         5           Devices with Tools Issued :         2           Tools Issued with Alerts :         0           Managed Tools Out :         0           Tools Managed :         160	red <u>Total</u> 1 15 5 2 0 0 0 1601	Name           Tool Box 1           ZA8BT001           Z98AT001           Z99LS001           Z94BJ001           Tool Crib West           Z93GS001           Z97AT001           Z93AU001	Alerts         Issu           5         0           2         0           12         1           6         0           2         1           1         4           1         0           1         0           1         0           1         0           1         0	Issued Use           0           4           0           1           0           0           0           0           0           0           0           0           0           0           0           0           0           0           0           0           0	Mngd Out	Alert Offline Mainte Mainte Mainte Mainte Mainte Mainte Mainte	nance Overdue nance Overdue nance Overdue nance Overdue nance Overdue nance Overdue nance Overdue nance Overdue	Location Tool Crib East Tool Crib East	Nan Wo Wo Wo Wo Wo Wo	me rk Location 1 rk Location 1 rk Location 3 rk Location 3 rk Location 4 rk Location 5 rk Location 7 rk Location 8 rk Location 10	Alerts 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Issued 1 0 0 0 0 0 0 0 0 0 0 0 0 0	Issued Users	Issued Devices	Mngd Out 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Alert Location Tool
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Then select the location at which you would like this feature to be set, and then select the **Options** sub-tab.

STATE	T	Top Level			Change	Current Locatio	n S	uperUser			Click to logout
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<ul> <li>Tool Crib West Work Location 1</li> <li>Work Location 1</li> <li>Work Location 13</li> <li>Work Location 14</li> <li>Work Location 3</li> <li>Work Location 5</li> <li>Work Location 6</li> <li>Work Location 6</li> <li>Work Location 8</li> <li>Work Location 8</li> <li>Work Location 12918J001</li> <li>Z936X001</li> <li>Z94BJ001</li> <li>Z936X001</li> <li>Z98BT001</li> <li>Z98BT001</li> <li>Z98BT001</li> <li>Z98BT001</li> </ul>	Na Customer No Parent Locat Responsible Employ	Top Level									



Expand the **Optical Toolbox** section of the options.

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			Dashboard	Location	s Tools	Tool States	Employees	Groups	History	Reports	Settings	
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Show Deleted Items	⊡L	ocker Hu	b									

Now you will see an option Prompt to check in another user's tools.

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Tool Crib West Work Loc2	Inheri	t options from	: Top Level								
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Work Location 10	Bar c	ode scan prom	pt v	ork Order E	ntry UI Style						
Work Location 14	Singl	e Play	~ AI	udio Alert L	evel						
Work Location 3	-		Su	ppress Wor	k Locations Pro	mpt					
Work Location 4	Sun	° 1 : 00	AM ~ De	evice Weekl	y Reboot (Devic	e Local Time)					
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# ATC Toolbox Drawer Retraining Procedure

This document will cover the different drawer retraining options that are available on the ATC Toolbox: Full, Present, Absent, and Single Tool.

## **Required Permissions**

- Tool Training Drawer
- Tool Training Single

NOTE: This document does not apply to a drawer foam change. If the drawer foam has been altered contact Pro-Services for assistance.



# Full Training

If you have any Tool Detection Issues such as the Wrong Tool message, conduct a Full drawer training on the effected drawer.

 Log into the toolbox using the badge scanner. From the Toolbox dashboard navigate to Settings=>Troubleshooting=>Retrain Drawer. You will need the proper permissions to access this menu.

Retrain Drawer				
Drawer 1	Drawer 2	Drawer 3	Drawer 4	
Drawer 5	Drawer 6	Drawer 7	Drawer 8	
Drawer 9	Drawer 10			

2. Select the drawer you wish to retrain.



3. Select Full Training and then click on the green arrow.

Select options for retraining drawer (2) Full Training Absent Present Update Drawer Image Select options for retraining drawer (2) Full Training Absent Present Update Drawer Image

4. Follow the onscreen prompts to complete the full drawer training.



# Present & Absent

Absent and Present training only refresh certain portions of the ATC Toolbox training process. WARNING: Only conduct Present or Absent Training if instructed by Snap-on® Technical Support.

# Update Drawer Image

If you wish to have a different image displayed when you open a drawer, select the Update Drawer Image option.

1. Log into the toolbox using the badge scanner. From the Toolbox dashboard navigate to Settings=>Troubleshooting=>Retrain Drawer. You will need the proper permissions to access this menu. 

Retrain Drawer				
Drawer 1	Drawer 2	Drawer 3	Drawer 4	
Drawer 5	Drawer 6	Drawer 7	Drawer 8	
Drawer 9	Drawer 10			

2. Select the drawer you wish to Update the Drawer Image on.



3. Then select Update Drawer Image

Select options for retraining drawer (2)
Full Training
Absent
Present
Update Drawer Image

Select options for retraining drawer (1)





4. Follow the onscreen prompts to Update the Drawer Image.

# Single Tool

Single tool retraining allows you to retrain a singular tool within a drawer. This allows you to replace a tool in a drawer without training the entire drawer or if a tool's color profile has changed since its initial training.



 Log into the toolbox using the badge scanner. There are two ways to perform a single tool retrain; either by navigating to the device inventory menu screen (Settings=>Inventory) or via the device dashboard (Note: A tool will only be shown on the dashboard if Issue/Returned or if a status such as wrong tool is attached to it).



2 Double click the tool in the inventory or dashboard. You will see a similar screen to that pictured below. Then click on the gear symbol.




2. To retrain this particular tool, click the triangle icon circled below.

		<b>ATI634</b> Bucking Bar 1 lb Z52AN001 Blue/Dwr 10								
	Tolera	Tolerance 0 (Device Default)								
	Trainir	raining								
<b>₽</b> ₹	Tool R	Fool Replacement								
	Signat	Signature								
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3. You will be shown an image of the drawer where the tool selected for retraining is highlighted. Click the green check mark and follow the onscreen prompts to train this tool.



#### **RFID** Cabinet/Locker

#### ATC OP Guide

See ATC OP Guide section in the ATC Toolbox section above.



#### ATC RFID Locker Basic Operation Issuue & Return

This document will the basic operation of the ATC RFID Locker. The ATC RFID Locker is designed for ease of use and quick response. The following is the standard workflow for issuing and returning tools from an ATC RFID Locker.

#### Issue/Return

The workflows for Issuing and Returning tools from the RFID Locker are similar to each other, with the key differences being whether taking or leaving tool(s) and what information is displayed onscreen.

1. To begin, wave your badge in front of the card reader on the right side of the cabinet. If you are an authorized user, you will hear the clicking sound of the door unlocking. This is represented on the screen with the padlock icon.



2. Upon opening the door, the system will log you in. You will notice that the padlock icon has now changed to show that the door is open.

NOTE: Sometimes the door may not unlock properly. This may be due to pulling on the door before the locking mechanism engages. Please make sure to wait for the click of the lock before you pull on the door.

जित	ŢÐÐŊ.	SuperUser, SUPERUSER	Close door to logout
2 Me		All Users	<b>\$</b>
	$\checkmark$		
Part Number	Details		



3. Either return the tool(s) in hand to the RFID Cabinet or find the tool(s) you want and remove them from the RFID Cabinet. Then close the door the system will then perform an RFID scan and issue or return whatever tool(s) that were removed/returned.

<b>S</b> tep <b>s</b>	SuperUser, SUPERUSER	Close door to logout
Me <	All Users	<b>*</b> 3
Part Number Detai	canning	

4. You will then be presented with the session summary screen.

				Ĵ
· · 1			Part Number	Details
<u>Issue</u>	<u> Keturn</u>	1	CTV5172	Battery 7.2V
		<u> </u>		SuperUser, SUPERUSER 11/15/2021 2
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lotal:	<u>Issued</u>			
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			-	

• A. Transaction Summary – These are the number of items that you are being issued or have returned. You can tap each to toggle the List of Tools (B).



- B. List of Tools This is the list of the currently selected tools. You can toggle it to show the list of tools being issued and tools being returned by tapping one of the options of the Transaction Summary (A).
- C. The number of Issued tools this session Displays the number of tools that are being issued to the user.
- D. Confirm Confirms and completes the transaction. If no input is made in 5 sec, this is automatically executed.
- E. Rescan Forces the RFID Cabinet to rescan for RFID Tags.
- F. Unlock the door Aborts the transaction and unlocks the door.
- 5. You can either tap the Confirm button or wait 5 sec, the tool(s) will be issued/returned to you, and the locker will return to the home screen.

F		DETT
		<mark>∥</mark> 1 🖉
	Part Number	Details
J	СТV5172	Battery 7.2V SuperUser, SUPERUSER 11/15/2021 4:24 PM



True-Crib



#### True Crib Work Flows

The purpose of this wiki is to document the work flows for the True-Crib device. This document will focus on the True-Crib specific portions of the device.

## Setting Up Attendants

True-Crib requires an Attendant to unlock the software before any tools can be issued or returned. An employee with special permissions is required to perform this action. To set a user as an attendant, you must use the L5 Connect<sup>™</sup> Administration Client.

1. In the admin client, select the user you want to set as an attendant.

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	Customer ID 12345ABC				thete					
	Email jsmith@co	ntaso.com	5		noto					
	Cell Phone 5551239870	G Carrier AT	ð(T -							
	Home Location R&D Lab	Home Location R&D Lab								
	Language Device Def	Language Device Default								
	Admin Login	Admin Login								
	User Name jumith	User Name jumith								
	Change Password	Change Bassaged								
The Original Street Street										



2. Go to the **Profiles Tab** and select the **Tool Crib**.

		Dashboard	Locatio	ans	Tools	Tool States
4	5	Employees	Groups	History	Reports	Settings
Name Smith, John J. SuperUser	Smith, John 1245ABC Info Poder Memb Top Level Maintenance R&D Lab Protetype 000 Tool Crib Z92LP995	A enthips Subscriptions	]			

3. Use the pull-down and select the **Attendant Profile**.

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Chi	متد	Dashboard	Locatio	ns	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Name Smith, John J. SuperUser	Smith, John J 2345ABC Info Voties Member Top Level Maintenance Manufacturing R&D Lab Prototype 0000 Tool Crib (Clear) SuperUser SuperUser SuperViewer Administrator Maintenance System User Power User Attendant	L erships Subscriptions			9	



Click Save in the Upper right Corner. The Employee can now log in as an attendant.
 Click Save in the Upper right Corner. The Employee can now log in as an attendant.

GIE	DATA	Top Level	Change Current Loca	stion	erUser	Click to logout
Cur.	Jul 1	Dashboard	Locations		Tools	Tool States
~		Employees	Groups	History	Reports	Settings
Name Smith, John J. SuperUser	Smith, John J 12345ABC	I. erships Subscriptions 1 Power User - dant -	)			
Show Deleted Items						

NOTE: Attendant is a custom profile. You must first create the profile before you can assign it to a user. In this case, it is a System User Profile with the added permission Location/Tool Crib Attendant.

For more information and instructions on how to create custom profiles, please see the Profiles Section of the L5 Connect<sup>™</sup> Administration Guide.



## Accessing the Crib

When you start the True-Crib<sup>™</sup>, you will be prompted to sign in as an attendant. This is the Employee who will be responsible for the Crib. You will need to have the Tool Crib Attendant permission granted to you beforehand to log in as an attendant.

1. To log in, scan your Badge with the RFID card reader.



2. Once you have scanned your Badge, you will be at the Attendant Dashboard. To log out, tap the Current Attendant button on the upper right-hand side of the screen.

45 Snap-on True-Crib						-		×
जिन्ह्य जिन्ह	72				Attendam SuperUser	Cīs	ck to loge	ut
	SCAN EMPL	OYEE BADGE TO START				20		9
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Top Employees with Issued To Top W	fork Locations with Issue	Top Devices with Issued Tools	Recent Even	nts Action 16:85 PM Tool Crib Attendant Lo	Part Number	Employee SuperUser	Source Tool Crib	



#### Scan Tag for Tool Options

In cases where there is an attendant logged in and there are no other overlay windows currently open, you can scan the tag of a tool to open the tool options screen for that tool.

<sup>15</sup> Snap-on True-Crib, v.9.12.6.1125, Tool Crib		RI	Ŀ	3			<b>R</b> D	) (* (* ¥ 1 ] (			Attendant SuperUser Click to logou
				so	CAN EN	1PLOYE	E BADO	GE TO START			<u>&gt;</u> > 3
System Status Devices Online : Devices Offline : Tools Issued : Users with Tools Issued : Devices with Tools Issued : Tools Issued with Alerts : Managed Tools Out : Tools Managed :	Filte 1 0 14 4 1 2 0 25	red To 4 7 2	otal 1 14 4 1 2 258	Device Status ! Name Aler Tool Crib East 3	ts issued	1   Hide Issued Users 4	OK Items Mngd Out 0	Alerts: Alert Maintenance Overdue Maintenance Overdue Maintenance Overdue Maintenance Overdue Maintenance Overdue Maintenance Overdue Maintenance Overdue Maintenance Overdue Maintenance Overdue Maintenance Overdue	Location Tool Crib East 1 Tool Crib East 1 Tool Crib East 1 Tool Crib East 1 Tool Crib East 1 Tool Crib East 1 Tool Crib East 1 Tool Crib East 1 Tool Crib East 1 Tool Crib East 1 Tool Crib East 1	Issued Tools Work Location Status 21 Name Alers Issued Issued Users 1 Work Loc2 0 1 1	Alerts: issued Devices Mingd Out 1 0
Top Employees with Issued Tool Plane Maintenance Hangar, Harry Plane Maintenance Hangar, Preston Ranner, Rhode Smith, John J.	ls 10 2 1 1	Top W. Item asse False Org Work Loo	c2	cations with Issu	1 red Tool	Top Dev Tool Crib I Z94BJ001	vices with East	Issued Tools 14 4	Recent Eve	Ants Part Number Employee Source Destinatio	on

From this screen, simply scan the tag of a tool in the crib with an approved L5 Connect barcode scanner.

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Тор	Default Part # / Desc. 5	970000374158 / Tape, electrical, black			
Plane					
Plane					
Runne					
Smith					

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### Issuing and Returning Tools

Once an attendant has signed into the True-Crib<sup>™</sup>, they can then begin to issue and return tools. All tool exchanges are done manually by the Crib Attendant. Employees authorized to utilize the tool crib must have permission to the tool crib for the attendant to issue and return tools to them.

When the Employee scans their Badge, it starts a session in which they can check out and return tools simultaneously. All transactions are saved when the session is closed. The Employee will then be presented with a summary screen letting them know how many tools were issued and returned during the session.

#### Issue a Tool

1. To issue a tool, an attendant must log in to unlock the system. While on the True-Crib<sup>™</sup> Dashboard, an employee must scan their Badge to start the process.

45 Snap-on True-Crib												
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2. Once True-Crib<sup>™</sup> scans the Badge, it will prompt you to select a Work Location if one is present. If there are no work locations in the system, this prompt will not display.



The example below shows three locations with the R&D Lab location containing 1 Work location. First, select R&D and then select Prototype 0001 as the work location to assign the tool.



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Тор	Supor ke Cab	(TT)	R&D Lab	Attendant
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N	OTE: Even thoug	h you can navig at the employee	ate the entire L has access to.	ocation Tree, you will only see

3. Once you have selected a Work Location (if available), you will be presented with the tool issue and return screen.





4. True-Crib<sup>™</sup> can utilize barcode tags that can be scanned to issue and return tools quickly. For example, scan the barcode for a **.040" Flat-head Screwdriver**. Once you do, the system will find the chosen tool and select one instance of that tool to be issued if there is one available.



NOTE: If there are not Tool Instances available to Issue, you will receive an error via audio feedback. For more information about tools and Instances, please read the Tools section of the L5 Connect<sup>™</sup> Administration Guide.

If the wrong tool instance is selected accidentally, you can clear your selection by clicking on the cancel button.

5. Now that you have scanned the tool and selected an available instance, you are ready to end the session and issue the tool to the Employee. The Employee will need to either swipe their badge again or click on the **Current Employee** button to complete the transaction.

Super tweek	yee Work Location Prototype 0001 / Cockpit SuperUser
Summary: SuperUser	Issue Mode       Quantity Available: 2         SGD48R       Screwdriver, Flat, Instinct <sup>**</sup> Soft Handle, Red, 0.40°         Guantity Available       Screwdriver, Flat, Instinct <sup>**</sup> Soft Handle, Red, 0.40°         Hume Location: Tool Crib       Image: Comparison of the thorn to the thorn to the thorn to the thorn to the thorn to the thorn to the thorn to the thore to the thorn to the the thorn to the thorn to the thorn to the thorn to the thorn to the thorn to the thorn to the thorn to the thorn to the thorn to the thorn to the thorn to the the thorn to the the thorn to the thorn to the the thorn to the thorn to the thorn to the thorn to the the thorn to the the thorn to the the thorn to the thorn to the the thorn to the thorn to the the thorn to the the thorn to the the thorn to the the thorn to the the thorn to the the thorn to the the thorn to the the thorn to the the thorn to the the the the the thorn to the the the the the the the the the the
SHOW ALL TOOLS SHOW ALL EMPLOYEES SUMMARY	



6. You will then be presented with a transaction summary that displays the number of tools issued/returned during the session.



The tool is now issued to the Employee.

7. You will now notice that the Dashboard has been updated to reflect the new status of the tool that was just issued.

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		SCAN EMPL	OYEE BADGE TO START				3 <b>(</b> )	ø
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8. Suppose you click on the device with the status, you will get the tool-issued information. You can click on the X to clear the tool info from the screen.

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#### Return a Tool

 Returning a tool follows a similar process to issuing a tool. First, an attendant will unlock the system. Then, the Employee will use their Badge to start a session and select a **Work Location** (if available). This time when they do, since they have tools checked out, the system will default to a **Return Mode** instead of **Issue Mode**. You can switch between these modes by clicking on the **Mode Toggle** button.

45 S	up-on True-Crib							-	D ×	
4	र्गात्।	DI	SuperUser CLICK TO CON	ee IPLETE SESSION	Work Location Prototype 0001 / Cockpit	2	Attendant SuperUser			
(Su	mmary: SuperU	ser —		Return	Mode					
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			Part Number ~		N					
	Part Number	Details								
	SGD4BR	Screwdriver, Flat, Instinc	t™ Soft Handle,							
11-		1000, 10-40								
5	OW ALL TOOLS	SHOW	ALL EMPLOYEES SUMMARY							

Switching between these two modes during a session will allow you to check-in and out tools within the same session. You can also press I or **R** followed by **Enter** on the keyboard to switch modes quickly.

2. In **Return Mode**, scan the barcode for the tool to be returned. When you do, the assigned instance will be marked for return.

45 Snap-on True-Crib				- 0 X
जित्तनुम्	Current Employee SuperUser CLICK TO COMPLET	E SESSION	SuperUser	
Summary: SuperUser	Part Number	eturn Mode sgD48R Screwdriver, Flat, Instinct <sup>™</sup> Soft Hand	lie, Red, .040°	
SGD4BR Red, .040'	er, rae, insulaci - duit, riandie,	ued(SuperUser) Home Location: Tool Crib Issued: SuperUser (%10/2022 2:21:58 PM) Work Location: Prototype 0001/Cockpit Tool(D: 100895 antity Available		0
		Home Location: Tool Crib Quantity Available: 1 ToolD: 100895 Home Location: Tool Crib Quantity Available: 1 ToolID: 100897		27 72
SHOW ALL TOOLS	SHOW ALL EMPLOYEES SUMMARY			



3. Click on the Current Employee Button to close out of the session to complete the return.



4. The tool has been returned to the Crib, and the Dashboard has been updated with the new information.

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	SCAN EMPLO	OYEE BADGE TO START			27		Ø
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#### **Tools Without Barcodes**

Sometimes, you may have a tool where a barcode has fallen off, becomes unreadable, or is otherwise unavailable. You can still issue and return these tools manually. To do this, you will need to search for it in your tool list.

1. In the default view, you will only see tools currently issued to the Employee. To see all tools, click the **SHOW ALL TOOLS** button in the lower left-hand corner.

45 Snep-on True-Orib			- 0	х
STEPETS 🍃 👷	ent Employee erUser ICK TO COMPLETE SESSION	Work Location Prototype 0001 / Cockpit	SuperUser	
Summary: SuperUser	UI Users	ode		
Part Number Details				
SHOW ALL TOOLS	S SLIMMARY			



2. This will list all tools within the Crib.

र्गान्	TPETR 🍃	uperUser CUCK TO COMPLETE	SESSION	SuperUser
mmary: Supe	erUser		ue Mode	
Part Number	Details	reamber		
434HDC	%" DR SET w/CASE & FOAM			
AT1429A-1	MICROSHAVER SKIRT-5/16			
AT1429A-2	MICROSHAVER SKIRT-3/8			
AT1429A-3	MICROSHAVER SKIRT-7/16			
AT1429A-4	MICROSHAVER SKIRT-1/2			
AT1429A-5	MICROSHAVER SKIRT-9/16			
AT1429A-6	MICROSHAVER SKIRT-5/8	•		
AT1429A-7	MICROSHAVER SKIRT-3/4			
AT1429B-1	MICROSHAVER CUTTER-CARB-5/16			
		- I • III		

In larger cribs, this list can become quite long. To assist the attendant in finding the correct tool, there is a search feature within the tool list. This search can be used to filter the list. The pull-down by the search box allows you to search by the following:

**PART NUMBER** – Search based on the tool's internal part number.

**DESCRIPTION** – Search based on a description of the tool in the system.

**EMPLOYEE** – Search for the tool to Employee it was issued.

WORK LOCATION - Search for the tool based on the Work Location it was assigned.

WORK ORDER - Search for the tool based on the Work Order used to issue the tool.

JIE.		SuperUser	MPLETE SESSION	Prototype 0001 / Cockpit	SuperUser	
mmary: Sup	erUser	All Users	lssue M	ode		
		Part Number ~	+			
Part Number 434HDC	Details %" DR SET w/CASE & FOAM	Description Employee				
AT1429A-1	MICROSHAVER SKIRT-5/16	Work Location				
AT1429A-2	MICROSHAVER SKIRT-3/8	Work Order Tag				
AT1429A-3	MICROSHAVER SKIRT-7/16					
AT1429A-4	MICROSHAVER SKIRT-1/2	•				
AT1429A-5	MICROSHAVER SKIRT-9/16					
AT1429A-6	MICROSHAVER SKIRT-5/8	•				
AT1429A-7	MICROSHAVER SKIRT-3/4					
AT1429B-1	MICROSHAVER CUTTER-CARB	-5/16				
47143499	MICROSHAVER CUTTER-CARR	-3/8				



This search bar is contextual, meaning that it will begin filtering the list as you type.

-5	Snap-on True-Crib						-	×
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ſ	Summary: Sup	erUser						
	2Me		All Users	Issue M	ode			 J
Ш	$\checkmark$	/						
	Q. 434		Part Number *					
	Part Number	Details						
	434HDC	%" DR SET w/CASE & FOAM						
	P8434HD	CASE AND FOAM FOR 434HDC						
	SHOW CONDITIONS AP	ND CHANGES ONLY SHOW ALL	EMPLOYEES SUMMARY					
1.00								

3. Once you have filtered the list and found the tool you are looking for, click on the tool. You will be given the **Tool Instance** sub-screen. This screen will display all instances of that tool within the Crib.





4. As You can see, this Crib has five DR Sets available. To issue one of these to the Employee, click on the **issue** button on the right side of the tool instance you wish to issue.



5. Once you click the Issue button, the tool will be marked as a pending issue. You can cancel the pending issue by clicking on the **cancel** button to the right of the selected instance.

15 Snap-on Tuo-	Crib							- 🗆 ×
Fi	E]	DETR 🍃	Current Employ SuperUser CLICK TO COM	yee MPLETE SESSION	Work Location Prototype 0001 / Cockpit		Attendant SuperUser	
Summary SMe	y: SuperU	ser —	@All Users	Issue M	ode	Quantity Avail	able: 4	
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2 43	4HDC	%" DR SET w/CASE & FOAM		Quantity A	vailable			~
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				Home Lo Quantity ToolID: 1	ocation: Tool Crib / Available: 1 100085			<b>-2</b>
				Home Lo Quantity ToolID: 1	ocation: Tool Crib / Available: 1 100122			<b>-2</b>
				Home La Quantity ToolID: 1	ocation: Tool Crib / Available: 1 100159			<b>₽</b>
SHOW COND	TIONS AND CH	ANGES ONLY SHOW ALL B	IPLOYEES SUMMARY	Home Li Quantity	ocation: Tool Crib / Available: 1			(r+2) .



6. If no more tools need to be issued, you will close the session the same way as you normally would. To return a tool manually, an Employee will log in normally. When they do, it will display a list of tools they currently have issued like normal. Simply select the tool from the list and click on the RETURN button to place the tool in a pending return.



7. Once you have all the tools ready to return, the user will log out like normal, and the tools will be returned to the Crib.



#### No Attendant Mode

The tool crib can be configured in such a way that an attendant is not required to log on to issue and return tools.

#### Configuring the No Attendant Mode

- 1. Using the Admin Client, navigate to the Locations Tab
- 2. Select the desired location level to implement the option change. (If setting the change at an organizational location make sure that no lower location levels override the Options inheritance)
- 3. Click on the Options sub-tab
- 4. Check the box for the Tool Crib No Attendant Required option
- 5. Click the blue disk in the upper-right to save the change
- 6. The tool crib must be connected to the L5 Connect service to receive the change
- 7. You may need to log in and out as an attendant once to update the behavior at the tool crib

#### Admin Client Screen





True-Crib Screen Attendant Required Screen

45 Snap-on True-Crib, v:9.10.4.0513, Tool Crib Dos



SCAN ATTENDANT BADGE TO START

No Attendant Required Screen

45 Snap-on True-Crib, v:9.10.4.0513, Tool Crib Dos



SCAN EMPLOYEE BADGE TO START



### Admin Mode

True-Crib<sup>™</sup> contains an administrative mode like the L5 Connect<sup>™</sup> Administration Client. However, this Mode is limited to just the Crib itself. It doesn't allow you to access any other device or make system-wide changes.

To access the administration mode, you must have an Admin Username and Password and permissions to access the admin functions.

1. You will first need to unlock the Crib as an attendant. Then click on the Admin Mode button.

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ज <u>नन</u> ्त्र है।	T					Attendant SuperUser	Gia	te logout
	SCAN EMP	OYEE BADGE TO START						Ø
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Top Employees with fassed To	Tap Work Lenations with fau	Top Devices with lauced fields	Record In	nanda Internet Ann	holan Sool (iik attandant ).ogin	Reri Humber	Englisyan Sugar/Saor	Tread Exilia

2. You will then need to enter your Admin Password as the username will automatically fill with the username of the currently signed-in attendant (if they have one).

User Name	superuser
Password	



3. You will now see a screen like the Administration Client that will allow you to change the Tool Crib. Click on the Exit tab to return to the True-Crib<sup>™</sup> Dashboard.



Note: For more information about these tabs and how to use them, please see the L5 Connect<sup>™</sup> Administration Guide.



### True-Crib Seats

If you need multiple transaction points (checkout lanes) in a single crib, you can use additional True-Crib<sup>™</sup> Seats. True-Crib<sup>™</sup> Seats allow users to open a remote terminal session to a True-Crib<sup>™</sup> instance using the L5 Connect<sup>™</sup> Administration Client.

The number of seats available is determined by the number of seats you purchase with your license. When a seat is not in use, it is part of a pool of seats that can be issued when someone starts a session. When they end a terminal session, the seat returns to the pool. You do not have to assign a seat to a PC statically. This allows multiple people to share seats that are not working simultaneously.

1. To start a Terminal session with a True-Crib<sup>™</sup> instance, you must have a Username and Password to log into the L5 Connect<sup>™</sup> Administration Client. Once you have logged in, go to the locations tab, and select the True-Crib<sup>™</sup> you want to connect. Then click on the Tool Crib Seat button.



2. This will open the True-Crib Terminal Session in Attendant mode. You can now issue and return tools from the admin client. When you log out of the session, the seat returns to the pool.

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Sie	E	Top Level Own		Attendant SuperUser	Click to logout
		Det ENPLOYEE BADGE N	- JIAN		
System Status <u>Filteend</u> J Devices Ordine : 1 Devices Ordine : 0 Tech Issued : 0 Users with Tech Issued : 0 Devices util Tech Issued : 0 Tools Issued with Alerts : 0 Managed Tech Out : 0 Tools Managed : 283	Zetal 1 1 1 1 1 1 1 1 1 1 1 1 1	Hold Of Name Alderfy  Inset Uses Infingi Dat Infingi	Week Location	n Status 📝 🗋 Adde Of theme ant Insued Users Insued Devices Megal Co	Alerts: a diet Device b
Top Employees with Issued 7. Top	o Work Locations with Iss.	Top Devices with Issued Tool	Recent Events Time Action Part Number 8	npleyee Source Destination	



#### ATC Portal

#### L5 Connect<sup>™</sup> ATC Portal Installation Guide

This guide ships with the ATC Portal product.



#### ATC Portal Workflows

This document will walk you through the basic operational workflows of the ATC Portal.

# **Basic Operation**

#### Issue Items

 Scan your badge using the external badge scanner. If you have access to the device, you will hear the message "Access Granted". This will allow access into the ATC Portal cage outer door. Note: The door will shut and lock behind you.

NOTE: If someone is already in the Portal, or if something is obstructing the path through the Portal, you will need an Attendant to override and unlock the door to clear the path or wait for the person in the portal to complete their transaction.





- 2. Grab the item(s) you wish to issue from the Tool Storage area and proceed back to the portal cage closing the doors behind you.
- 3. Scan you badge using the interior badge scanner located above the screen. The portal will then scan for whatever items you have.





4. Check to make sure all items were properly scanned by the portal. If all items were not detected by the portal press the **Rescan** button. This will only add new tools and not remove tools that have already been detected.

🍃 s	ocket, Sue	Work Location				
L Me not the set of th						
Tools	<mark>&gt;</mark> leaving with m	10				
0013	Part Number	Details		•••		
Z	CTECH4R600A Serial#TW-0001	600 ft. lb. torque wrench Socket, Sue 9/13/2024 2:37 PM		L I		
S.	PT1800AL Serial#IW-0001	1" Heavy Duty Impact Wrench Socket, Sue 9/13/2024 2:37 PM		Ļ		
q	WIND100	Shop Fan		ţ		
	Serial#	Socket, Sue 9/13/2024 2:37 PM				
Fools Part Seria	returning to sta Number al Number	socket, Sue 9/13/2024 2:37 PM				
Fools / Part Seria	returning to sta Number al Number Details	ock s *No Items		<b>1</b>		



5. Then click **Check Out**.

s 🦉	ocket, Sue	Work Location	
لل Me	3		👥 All Users i 🔧
Tools	leaving with m	le	Ħ
	Part Number Serial Number	Details	
<b>S</b>	CTECH4R600A Serial#TW-0001	600 ft. lb. torque wrench Socket, Sue 9/13/2024 2:37 PM	4
<b>S</b>	PT1800AL Serial#IW-0001	1" Heavy Duty Impact Wrench Socket, Sue 9/13/2024 2:37 PM	4
<b>S</b>	WIND100 Serial#	Shop Fan Socket, Sue 9/13/2024 2:37 PM	4
	-1.		





6. Following successful logout, a summary screen will appear on the display showing total number of tools issued/returned and # of tools with status or maintenance changes applied during the transaction. The Exit door will unlock. **Follow the audible instructions and exit the Portal.** The system will log you out and lock the exit door after you exit. **The selected items are now issued to you.** 

#### **Return Items**

1. While in possession of the items you wish to return to the portal, scan your badge using the external badge scanner. If you have access to the device, you will hear the message **"Access Granted"**. This will allow access into the ATC Portal cage. **Note: The door will shut and lock behind you.** 





2. Scan you badge using the interior badge scanner located above the screen. The portal will then scan for whatever items you have.





3. Check to make sure all items were properly scanned by the portal. Tap the **Restock** button at the bottom of the screen. The system will provide you with a transaction summary. **NOTE: This item has a home location of Row1 in the portal. Defining sub-locations for your portal can help make it for employees to know where to return the tool.** 



- 4. Open the door to the Tool Storage area and enter with the items to be returned and deposit them in the appropriate location.
- 5. Re-enter the Portal from the Tool Storage area and close the door.
- To Exit the Portal, proceed as if you were issuing out a tool. When the scan is complete and it doesn't find any tools, tap CHECK OUT. The summary screen will show 0 transactions.
   NOTE: While leaving the Tool Storage Area, if you need to check out different tools, you have the option to do so while you are leaving the Portal.
- 7. The exit door will then unlock. You can then exit the Portal, make sure the exit door closes completely. **This Return item transaction is now complete.**


## Physical Keys

The portal is equipped with two physical key locks that can be used to override some functions of the Portal.

## Door Lock Override

This lock will override the door lock to the portal if you need to enter it and perform maintenance or some other administrative function.





### Alarm Disable Lock

This lock will disable the alarm that sounds when someone presses the emergency exit button inside of the portal.





ATC FlexHub



## ATC FlexHub Setup

The goal of this document is to lay out the procedure for the setup of the ATC FlexHub system. This should allow the end user to establish the frame configuration, assign inventory/drop off on a compartment-by-compartment basis, as well as editing a compartment after frame configuration.

## Frame Configuration

Frame configuration defines the expected physical layout and use cases for electronically controlled compartments in the FlexHub system. If not defined at initialization, the software will prompt the user to jump to the process start screen. The process can also be started by navigating to **Menu/System Changes/Frame Configuration** if changes are made to the configuration after initial setup.

Required permission: Device setup

When to use:

- 1. Initial device setup during manufacturing (device will auto-prompt to perform process at startup if stored layout is not defined)
- Electronically controlled compartments are physically added, removed, or rearranged in the system.
   NOTE: if electronic latches are replaced but the layout is not changed, use the Door Latch Assignment process instead.

#### **Define Layout**

On device start up the user will be prompted with a setup screen with the text **Configuration Process Required. Frame Configuration.** Click **Jump to process start screen**.



The user will then scan their badge for access.



Scan badge for access.	Frame Configuration	<b>③</b>

This brings the user to the Frame Configuration screen. A warning message will then be shown to the user warning them not to proceed unless directed by technical support. **Warning DO NOT continue unless directed.** Click **Continue**.

	Frame Co	onfiguration	
Select Row Height	Select Components to Fill Row           Numbered Door/Drawer           6"         8"         12"         18"         24"		
6"	Frame Con Warr Do not proceed unless dire Improper use will affe	figuration ning cted by Technical Support. ect system operation.	
18"	Continue	Cancel	
24" 36"	Delete		
72"			

Now select the row height and numbered compartment width from the box shown below. **NOTE: Non-numbered** items are used to fill a space in the frame currently occupied by something other than a compartment such as the FlexHub PC



	Frame Cor	figuration
Select Row Height	Select Components to Fill Row	
3"	Numbered Door/Drawer	
4.5"	6" 8" 12" 18" 24"	
6"	Non-Numbered Items	
12"	6 12 18 24	
18"	Special	
24"	PICK UP	
36"	Delete	
72"		
	Frame Cor	figuration
Select Row Height	Selectomponents to Fill Row	figuration
Select Row Height	Selectomponents to Fill Row	figuration
Select Row Height 3" 4.5"	Selectomponents to Fill Row Numbered Door/Drawer 6" 8" 12" 18" 24"	figuration
Select Row Height 3" 4.5" 6"	Selectomponents to Fill Row Numbered Door/Drawer 6" 8" 12" 18" 24" Non-Numbered Items	figuration
Select Row Height 3" 4.5" 6" 12"	Selectomponents to Fill Row Numbered Door/Drawer 6" 8" 12" 18" 24" 6" Non-Numbered Items 6" 12" 18" 24"	figuration
Select Row Height 3" 4.5" 6" 12" 18"	Selectomponents to Fill Row Numbered Door/Drawer 6" 8" 12" 18" 24" Non-Numbered Items 6" 12" 18" 24"	figuration
Select Row Height 3" 4.5" 6" 12" 18" 24"	Selectomponents to Fill Row Numbered Door/Drawer 6" 8" 12" 18" 24" 6" 12" 18" 24" 6" 12" 18" 24" 6" 12" 18" 24" Special Frame CHUTE: DROP OFF CHUTE: PICK UP	figuration
Select Row Height           3"           4.5"           6"           12"           18"           24"           36"	Selectomponents to Fill Row Numbered Door/Drawer 6" 8" 12" 18" 24" 6" 12" 18" 24" 6" 12" 18" 24" 5 6" 12" 18" 24" 6" 24" 6" 12" 18" 24"	figuration

This process starts at the top left of the frame, adding compartments from left to right. Once the frame is filled out the user can continue or add another frame by clicking the **frame** button. **NOTE: Any frame added to the configuration must be completely filled out before continuing.** 



	Frame Cor	figuration	$\overline{\mathbf{S}}$
Select Row Height	Select Components to Fill Row		_
3"	Numbered Door/Drawer		
4.5"	6" 8" 12" 18" 24"		
6"	Non-Numbered Items		
12"	6" 12" 18" 24"	20 • 21 • 22 • 23 •	
18"	Special		
24"	Frame DROP OFF PICK UP		
36"		17 •	
72"	Delete	26 •	

Press the green arrow in the top left corner to continue and select the compartment use case.



### FlexHubs with more than Four Frames

The L5 Connect system supports FlexHub configurations with up to 16 frames. However, if your FlexHub configuration contains more than four frames the GUI will not be able to display them all at once. In this case, the GUI will switch to a tabbed display that allows you to toggle between groups of frames. Here is an example of a ten-frame configuration during layout definition. Notice the buttons at the top of the frame display that allow you to toggle between the frames holding the first twenty-two doors/drawers, the second twenty-four doors/drawers, and the remaining doors/drawers, which are currently displayed.

## NOTE: FlexHub displays/controls that are not a part of frame configuration process indicate groupings with frame numbers instead of door/drawer numbers. EX: F1-F4, F5-F9, etc...



### Select Use Case

 The user will then define how the compartments will be used, with the options: Mixed Use, 100% Drop Off, and 100% Inventory. NOTE: The 100% inventory option will not be available if the drop chute hardware is selected. Select whichever mode suits the user best. For this document we will select Mixed Use.





The user will then define a compartment to be used for tracking bags. This drawer will be referenced later anytime the user initiates the Tool Drop-Off workflow. Define the compartment for tracking bags by clicking any available compartment. **NOTE: bag/tag selection is not available if 100% inventory is selected. NOTE: The compartment designated for bag/tag cannot be changed, unless the user reconfigures the frame** 



 After a compartment is defined for the tracking bags, the user will then select the door to toggle the operating mode. NOTE: The arrow in the image below shows the key for this diagram, with a yellow in the box for inventory and a blue in the box for Drop off. Once completed click the green arrow in the top left corner. NOTE: If 100% Inventory or 100% Drop off selected the user will not have to define the





use case of each compartment as it will be done automatically.

The system will then determine if the door latch assignment matches the expected number and configuration. If this is not the case, the user will then be prompted to go through the door latch assignment shown in the next section.



## Door Latch Assignment

The door latch assignment process is used to associate the correct numbered door address with the hardware electronics. The steps below will be laid out as if following through the frame configuration procedure, however this will only be necessary in cases where the latch assignment does not match the defined layout. As stated, this process may occur towards the end of frame configuration and can also be reached from the settings menu in the following path **Menu/Troubleshooting/Latch Address assignment.** The user may need to navigate to this process if the latch hardware is replaced or if the layout selection completed but the previous attempt to run latch assignments failed.

Required Permissions: Device Setup

When to use:

- 1. Initial device setup during manufacturing after frame configuration is completed (device will auto-prompt to perform process at startup if stored layout is not defined)
- 2. Electronically controlled compartments or latches are physically added, removed, or rearranged in the system.

Scan your badge to verify you have authority to perform the procedure.

	Latch Address Assignment	$\textcircled{\begin{tabular}{ c c c c c } \hline \hline \hline \hline \hline \hline \hline \hline \hline \hline \hline \hline \hline \hline \hline \hline \hline \hline \hline$
Scan badge for access.		

Click the **Continue** button.



	Latch Address Assignme	nt
		. 2
	Latch Address Assignment Warning Do not proceed unless directed by Technic Improper use will affect system oper	al Support.
	Continue	8
	, ,	• 10
	"	12 TAGS / BAGS
Click continue after careful	ly reading the instructions in the messa Latch Address Assignme	ge. Int
		. 2
-	3	
Manually open all numbered Make sure drawers are pulle	d doors with access key. Leave doors open a ed clear of the plunger. Press continue whe	and relock cylinder before removing key. n complete or cancel to exit the process.
Manually open all numbered Make sure drawers are pulle	d doors with access key. Leave doors open a ed clear of the plunger. Press continue whe	and relock cylinder before removing key. n complete or cancel to exit the process.
Manually open all numbered Make sure drawers are pulle	d doors with access key. Leave doors open a ed clear of the plunger. Press continue whe continue cancel	and relock cylinder before removing key. n complete or cancel to exit the process.

Open each of the doors manually with the key. Be sure to relock the cylinder with the key before removing the key to move to the next door.

Then click the **OK** button to start the process of closing the doors.





Starting with door number 1, close each door in order, one at a time.

Latch Ad	dress Assignment	
Starting with #1, close all open doors in order one at a time. The process will timeout if more than 10 seconds passes without closing a door. If you make a mistake, wait for the timeout and retry.	1	2
	3	
	5	6
	7	8
	9	10 .
	"	12 TAGS / BAGS •







After a restart occurs the FlexHub is ready for use.



## Edit Compartment

The user may need to edit the use case or inventory of an individual drawer. Follow along with the procedure listed below to navigate to the edit compartment menu. For the sake of this document, we will separate the workflows into three headings: Change Drop-off to Inventory, Change Assigned Inventory, and Change Inventory to Drop-off.

Permission: Device Setup

When to use:

- 1. If the use case for an individual compartment or the entire frame has changed.
- 2. If the inventory of a compartment has changed.

Click on the settings menu in the top right corner. Within the settings menu click on the **System changes** button as shown below.



Then click on **Edit Compartment** button.



	System	Changes	<b>e</b>
Change: Service Connection	Frame Configuration	Edit Compartment	
The user will then need to	scan their badge to acce	ss the edit compartment s	ub menu.
Scan badge for access.	Edit Com	partment	



Now the user will see a graphic that displays the device compartments with a colored key in the bottom left.





#### Change Drop-Off to Inventory

To change Drop-off to inventory, click on one of the compartments with either the blue slanted lines or a filled in blue box. The user will be met with a popup menu with the text Change Drop Off => Inventory. NOTE: The drop off chute and assigned bag/tag compartments cannot be changed to inventory mode, along with any drop off compartment that is NOT empty.

Edit Compartment				
Complete the log out proces	is to continue.			
	Compartm	nent 2: Please select	an option.	
	Change Drop Off => Inventory	Cancel		
,				

2. Then the user will be asked to select inventory to place within the compartment. **NOTE: This can be skipped** by clicking the red X in the top right corner. The compartment will still change its designation to inventory but would show as an empty compartment.

T Internet J	Select	new inventory for compartment 2
	Part Number	Details
!	Kit001	Standard Tool Kit Kit Mism Kit Low
Ś	Kit001	Standard Tool Kit Socket, Sue 12/19/2023 1:45 PM Kit Niem
L.	Kit001	Standard Tool Kit Socket, Sue 12/19/2023 1:49 PM Kit Niem
S.	NT001	Allen Wrench Set Socket, Sue 12/19/2023 3:35 PM
	CON001	Consumable Tool 001
	CON001	Consumable Tool 001
	NT001	Allen Wrench Set

If inventory for the compartment is selected the user will be shown an additional screen that prompts them



to load the inventory into the open door and close it.





#### Change Assigned Inventory

#### NOTE: Inventory can only be assigned to inventory mode compartments.

1. Following a similar procedure as changing drop-off to inventory, the user will click on the graphic of the compartment in which they wish to change the assigned inventory. A similar list of options will be displayed where the user will select the option **Change assigned inventory**.

Edit Compartment				
complete the log out proces.	i to continue.			
ſ	• •			
	Compartm	ent 2: Please select	an option.	
	Change Inventory => Drop Off	Change assigned inventory	Cancel	
				,

2. Next the user will remove and replace the inventory currently in the compartment.



#### Change Inventory to Drop-off

NOTE: An inventory compartment cannot be changed to drop-off mode unless a bag/tag drawer is defined (100% inventory selections would have to complete the frame configuration process to select a bag/tag drawer)

To change a compartment from Inventory to Drop-off we will follow a similar procedure as listed in **Change Drop-off to Inventory**. Click on one of the compartments labeled inventory drop-off, and the user will see a message **Change Inventory => Drop-off**. If a compartment currently holding inventory is selected the user must remove the inventory before the drawer designation is changed. If assigning inventory from one compartment to another the user must **FIRST** remove the item from the original compartment before being assigned to a new compartment.

Edit Compartment				
Complete the log out process	to continue.			
	Compartm	ent 2: Please select	an option.	
	Change Inventory => Drop Off	Change assigned inventory	Cancel	
L				ſ



Complete the log out process	s to continue.	Edit Compartmer	nt	
	Compartm	ient 6: Please select Currently contains: NT001 Allen Wrench Set	an option.	
	Change Inventory => Drop Off	Change assigned inventory	Remove assigned inventory	
	Cancel			
	F	Remove the tool. Clo	ose the door	
1     2       5     7     8       11     12       13     15       17     17		19 19 19 19 19 19 19 19	32 (UTC)	



## ATC FlexHub Workflows

The goal of this article is to document the workflows for the ATC FlexHub. This will cover the workflows of users of the FlexHub as well as Tool Couriers/Tool Administrators.

## **Door LED Indicators**

Each compartment has two LED indicators to the right of the compartment door. The color and the flashing speed indicate device/compartment/tool conditions as described below.

## **Device Conditions**

Device condition indicators apply to the entire ATC FlexHub. All door LEDs will be used to report any detected device conditions. Reporting of individual compartment conditions will be overridden until the device condition is addressed and cleared.

### All Good => Green over Green

If any doors have two solid green LEDs, the device has been secured (no logged in user) and has no conditions to report. This condition is synchronized with the "Green Check" that is visible on the device's main screen. All tools that are expected to be present are contained in the device, no tools have alert statuses assigned, no tools are "in process", and the device itself has no alerts. **NOTE: When an issued tool has been assigned a "Managed Out of Box" status, the LED lights for its compartment will be off. This condition is still considered "Good" and will not affect the "All Good" condition for the rest of the device.** 

### Device Alert => Slow Blink Red over Solid Red

If all doors have a slow blinking red LED over a solid red LED, there is an "alert" status assigned to the device. Examples of device alerts include device offline, hardware error, etc. This condition should be addressed as soon as possible.

## Compartment Condition

Compartment condition indicators report the condition of a single compartment. Reporting of these conditions will be overridden by any device condition as described in the section above.

### Issued Tool => Amber over Amber

A door with two solid amber LEDs indicates that the assigned tool has been issued. It also indicates that the issued tool has no alerted statuses assigned. **NOTE: This condition will be overridden if a "Managed Out of Box" status has been applied to the tool. In that case, the door LEDs will both be off.** 



### Alerted Tool => Red over Fast Blink Red

A door with a solid read LED over a fast-blinking red LED indicates that the tool in the compartment has an alerted status assigned. **NOTE: This condition will be overridden if a "Managed Out of Box" status has been applied to the tool. In that case, the door LEDs will both be off.** 

### Issued and Alerted Tool => Amber over Fast Blink Red

A door with a solid amber LED over a fast-blinking red LED indicates that the tool normally in the compartment has been issued with an alerted status assigned. **NOTE: This condition will be overridden if a "Managed Out of Box"** status has been applied to the tool. In that case, the door LEDs will both be off.

### Tool In Process => Slow Blink Amber over Amber

A door with a slow blinking amber LED over a solid amber LEDs indicates that the tool in the compartment is "In Process". For example, it could be waiting for a courier to pick up or is being delivered to an employee.

### Open Door => Fast Blink Red over Fast Blink Amber

During the workflow, any opened doors will have a fast-blinking red LED over a fast blinking amber LED to draw the user's attention.

#### Return Candidates => Slow Blink Amber over Amber

During a return workflow, doors with a slow blinking amber LED over a solid amber LED indicate empty compartments to which the user can return tools.



# FlexHub Graphical Display

The FlexHub GUI uses a graphical representation of the device's physical layout on multiple screens. This on-screen graphic is used to indicate status and allow door/drawer selection by touch. Each screen contains an explanation of the status colors and/or control use instructions.





## FlexHubs with more than Four Frames

The L5 Connect system supports FlexHub configurations with up to 16 frames. However, if your FlexHub configuration contains more than four frames the GUI will not be able to display them all at once. In this case, the GUI will switch to a tabbed display that allows you to toggle between groups of frames. Here is an example of a ten framed configuration. The frames are divided into groups which can be accessed by selecting the proper button in the row of frame selection buttons above the frame display.





## **Employee/User Actions**

When an employee with device user permissions logs into the FlexHub they will be met with a screen with a variety of options within the bounds of a box labeled "Employee" as shown below. **NOTE: Issue/Return buttons are only shown if at least 1 inventory compartment is defined. Drop Off Tools and Receive tools option is not shown if no compartments are configured as drop off mode.** 

	(A) U (A) (A) (A) (A) (A) (A) (A) (A) (A) (A)			
	Select Work Flow	testguy Click to logout		
Return	Issue	Audit		
Drop off tools		Receive Tools		
Scan tag/code to auto-launch workflow				

When an employee with Admin permissions logs into the FlexHub they will be met with more options than a device user. These workflows are shown below. **NOTE: Issue/Return buttons are only shown if at least 1 inventory compartment is defined. Drop Off Tools and Receive tools options are not shown if no compartments are configured for drop off mode. If no bag/tag drawer is designated the Reload Bags option is not shown. Return other user's tools and drop off other user's tools are not shown if the user doesn't have Tool Return Device Other User Drop Off permissions enabled. The tool courier options will not be shown unless the user has Tool** 



Courier permissions.					
چه کې		Select Work Flo	ow	SuperUser	Click to logout
r Employee	Retu	rn other user tools	Issue		Audit
Drop off tools		Drop off other user tools		Receive Tools	
Tool Courier					
Pick up tools		Deliver tools		Reload	Bags
	Ý	Scan tag/code to	auto-launch work	flow	

## Issue Tool

Tool Issue is one of the primary workflows typical of users of the FlexHub. This workflow option will record the tool number issued along with the employee associated, and the date and time of issue. **NOTE: Issue button is only shown if at least 1 inventory compartment is defined** 

Access point(s): FlexHub Dashboard after user sign in

Required Permission: Device User



- -

## L5 Connect User Manual

1. To issue any tools from the FlexHub, the user must first use their ID badge to sign into the FlexHub. Then the user will select Issue within the Employee options list.

Select Work Flow			Si Si	uperUser	Click to logout	
Return	Return Return other use		Issue		Audit	
Drop off tools		Drop off other user tools		Receive Tools		
Tool Courier	Tool Courier					
Pick up tools		Deliver tools		Reload Bags		
Scan tag/code to auto-launch workflow						

2. Once Issue is selected, the user will be met with a screen that will display the inventory currently available to issue. 

	-		Issuing	-	
Part Number	Details		Part Number	Details	
NT001 Door 3	Allen Wrench Set	→			
NT001 Door 2	Allen Wrench Set	→			
NT001 Door 14	Allen Wrench Set	+			
	1				

3. The user can move a tool from the left side of the screen to the right side by either clicking the Red Arrow button or by scanning the barcode on the door of the compartment containing the target tool. Click the



Issue button to start the issue process.

Part Number       Details         NT001       Ooor 2       Allen Wrench Set       Image: Coord Set         NT001       Ooor 14       Allen Wrench Set       Image: Coord Set         Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set         Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set         Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set         Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set         Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set         Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set         Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set         Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set         Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set         Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set         Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set       Image: Coord Set <td< th=""><th>issue</th><th></th><th></th><th></th><th></th></td<>	issue				
Part Number Details     NT001 Oor 2   NT001 Allen Wrench Set     NT001 Oor 14     Allen Wrench Set     Image: Contract of the set <th></th> <th>Issuing</th> <th>1</th> <th></th> <th></th>		Issuing	1		
NT001 Door 2 Allen Wrench Set NT001 Door 1 Allen Wrench Set Door 1 Allen Wrench Set Issue	er Details		Part Number	Details	
NT001 Door 14 Allen Wrench Set	r 2 Allen Wrench Set	→	NT001 Door 3	Allen Wrench Set	
	Allen Wrench Set	→	-		
Isue	· · ·				
Isue					
Isue					
Issue					
lessue					
Issue					
Issue					
				Issue	

- 4. If work locations/work order entry is enabled for the FlexHub, the user will be prompted to select a work location and/or enter a work order number after selecting tools for issue.
- 5. The doors of the compartments will be opened, and the user will be prompted to remove the tools and close the doors.

	Remove the tool. → Close the door.
1	• 2
3	• 4
5	• 6
7	• 8
9	• 10
11	• 12 TAGS / BAGS
Remove the tool> Close the door Complete	
Z97AT0	001 sw:9.10.4.0513 6/11/2024 20:27:09 (UTC)



6. After closing the door to the compartment, the user will be prompted to verify the tool if required for that tool.

	Verification Required			
1	A2A Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/ 297AT001	16"		
Additional Info				
User Label 2				
	√ Scan badge to verify.	Status	! Decline	



7. After Issuing a tool the user can choose to continue with another workflow or logout of the device, shown below. Click logout to end the session or click continue to select a different workflow. **NOTE: If no option is selected the user will automatically be logged out after several seconds** 



### Lock Out Tool Issue when Status Is Set

The system can be configured so that when a tool has a specified status, it may not be removed from the FlexHub unless the user has the **Bypass Tool Status Issued Lock Out** permission. For example, if a torque wrench had been tagged with a **Calibration Requested** status, an employee with the **System User** profile would not be able to issue the tool. But someone who is set up to manage tool calibrations, who had the **Bypass Tool Status Issued Lock Out** permission, would be able to issue the tool so that he could take it to be recalibrated.

#### Configuring the Admin for Lock Out Tool Issue when Status Set Feature

- 1. Using the admin client, login and navigate to the **Settings** Tab.
- 2. Select the **System Configuration** item in the list.
- 3. Click the **Status Types** button.



- 4. Select the status which should prevent issue when set.
- 5. Check the Locker Hub checkbox for the Lock out tool issue when set on these devices: field.
- 6. Click the save button in the upper right corner to save your change.

#### Lock Out Tool Issue when Status Set Behavior

Attempts to issue a tool with a status set that has been flagged for lock out will produce the following message if the user does not have the **Bypass Tool Status Issued Lock Out** permission.

Select	tools for is	sue.			
				Issuing	
	Part Number	Details		Part Number Details	
	A2A Door 1	Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16"	8	PT1800AL Door 2 Cal Reg.	
	CTECH4R600A Door 3	600 ft. lb. torque wrench	8		
	WIND100 Door 4	Shop Fan	8		
	T	Fool(s) cannot be issued due to a status loc PT1800AL, 1″ He (Calibration Requested	ckou eavy Sup	it and will be removed from the selected items.: Duty Impact Wrench erUser 6/19/2024 11:04 AM) *	
				Issue	



If the user does have the **Bypass Tool Status Issued Lock Out** permission, they will be prompted to make sure they really intended to issue the tool with status.

Select tools for issue.	
	Issuing
Part Number Details	Part Number Details
A2A Door 1 Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16"	PT1800AL 1" Heavy Duty Impact Wrench Door 2 Cel Reg.
CTECH4R600A Door 3 600 ft. ib. torque wrench	
Tool(s) have a status lockout applied and should not be issue ther PT1800AL, 1" Heavy (Calibration Requested Supe	e used until the condition is corrected. Do you want to m anway? Duty Impact Wrench erUser 6/19/2024 11:04 AM)
	Issue

## Return Tool

Tool return is one of the primary workflows typical of users of the FlexHub. This workflow option will record the tool number returned along with the employee associated, and the date and time of return. **NOTE: Return button is only shown if at least 1 inventory compartment is defined** 

Access point(s): FlexHub Dashboard after user sign in

Required Permission: Device User



1. To return any tools to the FlexHub, the user must first use their ID badge to sign into the FlexHub. Then the user will select **Return** within the Employee options list.

Employee	Select Work Flow				uperUser Click to logou
Return	Retu	rn other user tools	Issue		Audit
Drop off tools		Drop off other user tools		Receive Tools	
Pick up tools		Deliver tools		Reload Bags	
Scan tag/code to auto-launch workflow					

2. Once return is selected the user will be met with a screen that will display the inventory currently issued to the logged in user.

S	elect item for return
Part Number	Details
A2A Door 1	Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16" testguy 6/13/2024 4:00 PM
PT1800AL Door 2	1" Heavy Duty Impact Wrench testguy 6/13/2024 4:07 PM
	·



3. Select the tool to be returned and then click the **Green Checkmark** button or by scanning the tag on the tool, to initiate the return of the tool.

S	elect item for return
Part Numbe	r Details
A2A Door	Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/16" testguy 6/14/2024 8:25 AM
PT1800AL Door	1° Heavy Duty Impact Wrench           testguy 6/14/2024 8:25 AM

4. The user will be prompted to verify the tool if required for that tool.

		Verification Required	<b>e</b>
1	A2A Adaptor, 3/8" Internal drive x 1/2" External drive, 1 5/ 297AT001	°16°	
Additional Info			
User Label 2			
	✓ Scan badge to verify.	Status	! Decline


5. The door assigned to the tool being returned will open and the user will be met with an additional screen where they can attach a status type to the returned tool. Select a status(es) from the right and click the green checkmark, if no status type is required click the green checkmark. NOTE: If you need to set a status you must do that before closing the door of the compartment after returning the tool. Otherwise, the system will assume you did not want to add a status. You may also cancel the tool return by pressing the Cancel button in the top right corner. If multiple tools are being returned, all remaining tool returns will also be canceled.



- 6. The user will return the tool and close the door.
- 7. The user will then be returned to the screen displaying the list of tools he currently has issued from the FlexHub. He can initiate return of another tool, click the **Red X** button to end the return workflow, or do nothing and the return flow will end after a brief delay and the summary screen will be displayed.





After Issuing/Returning a tool the user can choose to continue with another workflow or logout of the device, shown below. Click logout to end the session or click continue to select a different workflow. NOTE: If no option is selected the user will automatically be logged out after several seconds



#### Scan to Start Issue/Return Tool

The system can be configured to allow the issue or return process to be initiated by scanning a tag. This must be configured with the Admin Client.

#### Configuring Admin Client for Scan to Start Issue/Return

- 1. Login and navigate to the **Locations** tab.
- 2. Select the FlexHub in which you wish to use scan to start issue/return. Then click on Options.
- 3. Look to see if the Options for this device are inherited from another location. If the options are inherited, you will either need to go to that location to change the options or uncheck the checkbox to inherit options to set them for this location.



- 4. Click on the checkbox next to **Auto-start Tool Issue Process on Tag Scan** to enable scan auto-start for tool issue.
  - Since you can't scan a tag on a tool that is in the compartment to issue that tool, you will instead have to scan a tag on the door of the compartment. This will require you to add a set of 2D bar codes to the doors of the compartments of the locker. These can be obtained from the **Pro-**Services team.
- 5. Click on the checkbox next to **Auto-start Tool Return Process on Tag Scan** to enable scan auto-start for tool return.
- 6. The user can also configure the system to require a tag scan on tool issue, **Require Tag Scan on Tool Issue**, or tool return, **Require Tag Scan on Tool Return**, if desired.

#### Scan to Auto-start Tool Issue

- 1. To issue tools to the FlexHub, the user must first use their ID badge to sign into the FlexHub.
- 2. Instead of selecting **Issue** within the Employee options list, the user would use the barcode scanner to scan the tag on the door of the compartment containing the tool that they wish to issue.
- 3. From this point, the issue process would continue as described above in the Issue Tool section.



4. At the end of the issuing process, the user will then be shown a summary screen. At this point the user could then scan another door tag to initiate the issuing process for another tool.



#### Scan to Auto-start Tool Return

- 1. To return tools to the FlexHub, the user must first use their ID badge to sign into the FlexHub.
- 2. Instead of selecting **Return** within the Employee options list, the user would use the barcode scanner to scan the tag on the tool that they wish to return.
- 3. From this point, the return process would continue as described above in the **Return Tool** section.



4. At the end of the return process, the user will then be shown a summary screen. At this point the user could then scan another issued tool's tag to initiate the returning process for another tool.



#### Scan Required for Tool Issue/Return

The FlexHub can be configured to require a tag to be scanned for tool issue and/or tool return.

#### Configuring Scan Required for Tool Issue/Return

- 1. Follow the first three steps of the procedure in **Configuring Admin Client for Scan to Start Issue/Return** to go to the proper place in the admin client.
- 2. Check the **Require Tag Scan on Tool Return** checkbox to require the tool tag to be scanned on tool return.
- 3. Check the Require Tag Scan on Tool Issue checkbox to require the tool tag to be scanned on tool issue.
- 4. Click the **blue save disk** button to save your changes.

#### Tag Scan Required on Tool Issue

1. Start the issue tool process as normal. Once the tool has been selected to issue the user will be prompted to remove the tool, scan the tag, and close the door.



· · · · · · · · · · · · · · · · · · ·	
Remove the tool.	→ Scan the tag. → Close the door.
1	
3	4
5	6
7	8
9	10
11	12 TAGS / BAGS
Remove the tool> Scan the tag	
Z97AT001 sw:9.10.4.0513	6/14/2024 19:45:05 (UTC)

The process won't proceed until the tool tag has been scanned. Otherwise, the issue process will proceed as previously described in the **Issue Tool** section.

#### Tag Scan Required on Tool Return

1. Start the tool return process as normal. Once the tool has been selected to return the user will be prompted to scan the tool tag to return the tool.

	Se	lect item for return
	50	
	Part Number	Details
1	PT1800AL Door 2	1" Heavy Duty Impact Wrench testguy 6/14/2024 2:47 PM
		These tools require a tag scan for return.
		PT1800AL 1' Heavy Duty Impact Wrench Door 2
_		Scan the tag
		Bypass Tag Scan (Sets Needs Confirm Status)

2. Once the tag has been scanned, the tool return process will proceed as previously described in the **Return Tool** section.



#### Multiple Return

The FlexHub allows the return of multiple tools at once versus the standard one tool at a time. This option can be configured with the L5 Admin Client.

#### Configuring Multi-Select Return in Admin Client

- 1. To set up multiple return we must open the L5 Admin Client.
- 2. Login and navigate to **Locations** and select the FlexHub in which you wish to have the multi-select return. Then click on **Options**.
- 3. Look to see if the Options for this device are inherited from another location. If the options are inherited, you will either need to go to that location to change the options or uncheck the checkbox to inherit options to set them for this location.
- 4. Click on the checkbox next to Locker Hub Allow Multi-Select Return to enable multi-select return.

#### Multi-Select Return Workflow

1. To return multiple tools to the FlexHub, the user must first use their ID badge to sign into the FlexHub. Then the user will select **Return** within the Employee options list.



2. You will see a list of tools issued to the currently logged in user on the left. Either scan the barcode for the tool or click the **red arrow** for that tool to move the tools you wish to return into the **Returning** column.

ct tools for ret	urn.				
		⊐	Returning		
Part Number Serial Number	Details		Part Number Serial Number	ails	
NT001 Serial# Door 4	Allen Wrench Set Mechanic, Mike 3/20/2024 3:06 PM	+			
CTECH4R600A Serial#TW-0001 Door 6	600 ft. lb. torque wrench Mechanic, Mike 3/20/2024 3:06 PM	•			
434HDC Serial#434HDC-1 Door 11	<sup>3</sup> ⁄4" DR SET w/CASE & FOAM Mechanic, Mike 3/20/2024 3:06 PM	•			
	·				
				Return	
ct tools for retu	ırn.	₹	Returning	Return	Ć
ct tools for retu Part Number Serial Number	urn. Details	₹	Returning Part Number Serial Number	Return	
ct tools for retu Part Number Serial Number	urn. Details	<b></b>	Returning Part Number Serial Number NT001 Serial# Dool	Return          Details         Allen Wrench Set         Mechanic, Mike 3/20/2024 3:06 PM	
et tools for retu Part Number Serial Number	urn. Details	<b>,</b>	Returning Part Number Serial Number NT001 Serial# Dool CTECH4R600A Serial#TW-000 Dool	Petails       Allen Wrench Set Mechanic, Mike 3/20/2024 3:06 PM       600 ft. lb. torque wrench Mechanic, Mike 3/20/2024 3:06 PM	
ct tools for retu Part Number Serial Number	urn. Details	<b></b>	Returning Part Number Serial Number Serial Number Serial# Door CTECH4R600A Serial#TW-000 Door 434HDC Serial#434HDC Serial#434HDC	Return         Details         Allen Wrench Set Mechanic, Mike 3/20/2024 3:06 PM         600 ft. lb. torque wrench Mechanic, Mike 3/20/2024 3:06 PM         4         4         4         5         600 ft. lb. torque wrench Mechanic, Mike 3/20/2024 3:06 PM         7         4         7         8         8         9         9         9         9         9         9         9	
ct tools for retu Part Number Serial Number	urn. Details	=	Returning Part Number Serial Number Serial Number Door CTECH4R600A Serial#17W-000 Door 434HDC Serial#434HDC Serial#434HDC Door	Return         Details         Allen Wrench Set         Mechanic, Mike 3/20/2024 3:06 PM         Mechanic, Mike 3/20/2024 3:06 PM         *** <t< td=""><td></td></t<>	
ct tools for retu Part Number Serial Number	urn. Details	<b>T</b>	Returning Part Number Serial Number NT001 Serial# Door CTECH4R600A Serial#TW-000 Door 434HDC Serial#434HDC Serial#434HDC Door	Return         Details         Allen Wrench Set Mechanic, Mike 3/20/2024 3:06 PM         600 ft. lb. torque wrench Mechanic, Mike 3/20/2024 3:06 PM         4         4         600 ft. lb. torque wrench Mechanic, Mike 3/20/2024 3:06 PM         5-1         ½" DR SET w/CASE & FOAM Mechanic, Mike 3/20/2024 3:06 PM	
ct tools for retu Part Number Serial Number	urn. Details	=	Returning Part Number Serial Number Serial Number Dool Serial# CTECH4R600A Serial#TW-000 Dool CTECH4R600A Serial#434HDC Serial#434HDC Door	Return         Petails         Allen Wrench Set         Mechanic, Mike 3/20/2024 3:06 PM	
ct tools for retu Part Number Serial Number	urn. Details	<b>T</b>	Returning Part Number Serial Number NT001 Serial# Door CTECH4R600A Serial#TW-000 Door 434HDC Serial#434HDC Serial#434HDC Door	Return       Details       Allen Wrench Set Mechanic, Mike 3/20/2024 3:06 PM       600 ft. lb. torque wrench Mechanic, Mike 3/20/2024 3:06 PM       4       4       600 ft. lb. torque wrench Mechanic, Mike 3/20/2024 3:06 PM       5-1       34* DR SET w/CASE & FOAM Mechanic, Mike 3/20/2024 3:06 PM	
ct tools for retu Part Number Serial Number	urn. Details	<b>=</b>	Returning Part Number Serial Number NT001 Serial# Door CTECH4R600A Serial#TW-000 Door 434HDC Serial#434HDC Serial#434HDC Door	Return       Details       Allen Wrench Set Mechanic, Mike 3/20/2024 3:06 PM       600 ft. lb. torque wrench Mechanic, Mike 3/20/2024 3:06 PM       1       3/2       4       10       6       74       6       75       76       77       78       79       79       70       70       70       71       74       75       76       77       78       79       70       70       70       71       71       72       73       74       74       74       75       75       76       76       77       78       78       79       79       70       70       70       70       70       70       70       70       70       70       71       71       72       73       74       74	
ct tools for retu Part Number Serial Number	Jrn. Details	=	Returning Part Number Serial Number NT001 Serial# Door CTECH4R600A Serial#TW-000 Door 434HDC Serial#434HDC Door	Return         Petails         Allen Wrench Set Mechanic, Mike 3/20/2024 3:06 PM         Mechanic, Mike 3/20/2024 3:06 PM	
ct tools for retu Part Number Serial Number	urn. Details	<b>→</b>	Returning Part Number Serial Number Serial Number Door CTECH4R600A Serial#TW-000 Door 434HDC Serial#434HDC Serial#434HDC Door	Return       Details       Allen Wrench Set Mechanic, Mike 3/20/2024 3:06 PM       600 ft. lb. torque wrench Mechanic, Mike 3/20/2024 3:06 PM       1       3/1       6/1       1/2	

- 3. Click the **Return** button to initiate the return of the tools.
- 4. At this point the process will continue as described for a single tool return flow serially for each of the tools selected for return.



#### Return Other User Tool(s)

The FlexHub allows a permissioned user to return tools for others within their organization that have been issued from the FlexHub's inventory.

Access point(s): FlexHub Dashboard after permissioned user sign in

Required Permission: Tool Return Other User Device Drop Off.

1. To return another's tools click on the Return other users' tools box within the select workflow screen. Then the user will select which employee they are returning tools for.

	Select employee	for tool drop off:
Mechanic, Mike	Socket, Sue	

- 2. After an employee's name is selected, a list of all the tools the user has issued from the FlexHub are visible. **NOTE: Only tools the user has issued from the FlexHub show in this list.**
- 3. Select the tool(s) for return and then follow the normal return procedure.



#### Error Recovery Support

The system has support for when things might not go quite as expected during one of the flows. There is a button with a first aid icon that the user can click to use this error recovery support.



There are buttons to

- **Cancel process** if you want to stop in the middle of a flow
- **Reopen Doors** if you accidentally put the wrong tool and need to reopen the door to put the proper tool in, for instance
- **Door won't close** to alert the system that the door is not closing properly
- Doors are closed if the door did not open when it should have

#### **Drop-off Tools**

The FlexHub also allows a user to drop off any tools currently issued to them from any device within the L5 Connect system. Tools will be assigned a "Waiting for courier" status when dropped off at the FlexHub. **NOTE: This option is not shown if no compartments are configured as drop-off mode.** 

Access point(s): FlexHub Dashboard after user sign in

Required Permission: Device User

- 1. Select **Drop-off Tools** from the FlexHub main screen. **NOTE: If drop off for other user's tools is selected** with an admin employee an additional screen will be displayed where the user picks which user they are dropping off for, similar to Return other users tools
- 2. Select a tool from the list of issued tool(s) from the left. **NOTE: multiple items can be selected if they are all contained within the same bag. The drop off process must be repeated if the tools should be held in a separate bag.** Once item(s) are selected press the **Drop Off** button and attach a status if necessary.



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#### NOTE: This list shows tools issued to the user from any device within the L5 Connect system.

Select Tools To Drop Off For Mechanic, Mike

Current Issued Tools	5		Dropping Off	ff Tools	
Part Number	Details		Part Number	r Details	
ATI429A-2	MICROSHAVER SKIRT-3/8 Z99LS001 12/19/2023 2:55 PM	-			
ATI429A-3	MICROSHAVER SKIRT-7/16 Z99LS001 12/19/2023 2:55 PM	•			
NYZ001	Blade NYROC 1" Z99LS001 12/19/2023 2:55 PM	•	1		
NT001	Allen Wrench Set Z99LS001 12/19/2023 2:55 PM	-	1		
	Create: Personal Tool			Drop Off	

nt Issued Too	ls	Droppi	Dropping Off Tools			
Part Numbe	r Details		Part Number	Details		
AT1429A-3	MICROSHAVER SKIRT-7/16 Z99LS001 12/19/2023 2:55 PM	+	AT1429A-2	MICROSHAVER SKIRT-3/8 Z99LS001 12/19/2023 2:55 PM		
NYZ001	Blade NYROC 1" Z99LS001 12/19/2023 2:55 PM	+				
NT001	Allen Wrench Set Z99LS001 12/19/2023 2:55 PM	+				

3. Select an open drop-off compartment. These compartments show white if empty and solid grey compartments if full/not assigned for drop-off. After a drop-off compartment is selected, the bag/tag storage compartment will open, and the user will be prompted to take a bag/tag from the compartment and





close the door. Then scan the new tag or barcode.

4. Place tagged tool or bag in the opened compartment and then close the door.

#### Create Personal Tool

If you have a personal tool, not in the L5 Connect<sup>™</sup> system, you can still place it in the FlexHub if you need some maintenance. The process of dropping off a personal tool is very similar to the standard procedure.

Access point(s): Under Tool drop off workflow after user sign in

Required Permission: Device User



1. When you select Drop off Tools from the Workflow page, you are presented with the Tool Selection page. At the bottom of the page, tap Create: Personal Tool.

nt Issued Tools			Dropping Off	Tools
Part Number	Details		Part Number	Details
ATI590L	Kit - Rivet shaver SN: ATI590L-01 <i>Z99LS001 12/19/2023 2:04 PM</i>	-		
ATI429B-1	MICROSHAVER CUTTER-CARB-5/16 Z99LS001 12/19/2023 2:04 PM	+		
AT1429B2	MICROSHAVER CUTTER-CARB-3/8 Z99LS001 12/19/2023 2:04 PM	+		
L52B	T-BAR HEAD Z99LS001 12/19/2023 2:04 PM	+		
LDH262	3/4DR 12PT 13/16" SHL SKT Z99LS001 12/19/2023 2:04 PM	+		
NT001	Allen Wrench Set <i>Z98BB001 1/17/2024 10:51 AM</i> Cal. Req.	+		
	ł			
	•			

- 2. The FlexHub will display the Personal Tool creation screen. From this page, you can input the details of the tool:
  - Owner: The Employee that created the tool in the ATR.
  - Part Number: A Number to represent the tool in the L5 Connect<sup>™</sup> system.
  - Description: A short description of what the tool is.
  - Notes: Explanation of why you are placing the tool in the ATR and any special instructions.



#### • Status: The status of the Tool.

Select	Tools To D	rop Off		Editing: Personal Tool	
Current	t Issued Tool	s	Owner	Socket, Sue	
	Part Number	Details	Part Number		
	AT1590L	Kit - Rivet SN: ATI59	Description		
		Z99LS0	Notes		
	ATI429B-1	MICROSH Z99LS0	Status		
	AT1429B2	MICROSH Z99LS0			
	L52B	T-BAR HE Z99LSO			
	LDH262	3/4DR 12 <i>Z99LS0</i>			
	NT001	Allen Wre <i>Z98BB0</i> Cal. Req.			

3. Then, tap the ✓ button in the upper left to continue. The rest of the process is identical to the normal Dropoff process.

Selec	t Tools To D	Drop Off		📁 Editing: Personal Tool	
Curren	t Issued Too	ls	Owner	Socket Sue	
	Part Number	Details	Part Number	My Too1-001	
		Kit - Rivet	Description	MY Green Handheld Personal Tool	
	ATI590L	Z99LS0	Notes	Only clean with water as finish will deteriorate with solvents	
	ATI429B-1	MICROSH Z99LSO	Status		
	AT1429B2	MICROSH Z99LS0			
	L52B	T-BAR HE Z99LSO			
	LDH262	3/4DR 12 <i>Z99LS0</i>			
	NT001	Allen Wre Z98BB0 Cal. Reg.			



#### **Receive Tools**

For a user to receive tools they must first be dropped off by a courier, this information must be initiated within the L5 Connect Admin Client. **NOTE: This option is not shown if no compartments are configured as drop off mode.** 

Access point(s): FlexHub Dashboard after user signs in.

Required Permission: Device user (also requires tools delivered off by courier)

 Select the Receive Tools box from the FlexHub main menu. NOTE: If the user has no tools to receive the box will be greyed out. This will bring up a list of tools that have been addressed to the user directly. Select the items from the list and click Receive Tools.

ing for E	mployee	⇒	Tools To Receive
Door	Details		Door Details
15	NT001/Allen Wrench Set	-	
			Receive Tools



Select Tools to Receive				
Waiting for Employee	⇒	Tools To Red	eive	Ħ
Door Details		Doo	r Details	
		15	NT001/Allen Wrench Set	<b>+</b>
			Receive Tools	

Collect all tools from open compartments and close all doors.





## **Tool Courier Actions**

NOTE: The device must have an active connection to the L5 Connect Service for Courier functions (drop off/pick up/etc).

#### Pick up Tools

A Tool Courier uses this workflow to pick up tools previously dropped off by other users at the FlexHub. Picked up tools will be assigned the "In transit" status and assigned to the courier until they are scanned as received at a Tool Crib."

Access point(s): FlexHub Dashboard after courier user sign in

Required Permission: Tool Courier login

 Log in to FlexHub using the RFID Badge Scanner, then select Pickup Tools from the Tool Courier menu options. NOTE: Only tools that have been dropped off can be picked up a courier. The courier will then see a list of tool bags waiting for pickup. Click the red arrow to move a bag over from Tool bags waiting to Picking up bags, then click Pickup.

			<u>]</u>				
ags waiti	ng	⇒	Picking up bag	Picking up bags			
Door	Details		Door	Details			
#16 (444555)	1 Tools Mechanic, Mike	-	#15 (12154	1 Tools 451) Socket, Sue			
				<b>2</b> 1			



2. Remove the tool/bag, close the door, and scan the tag.





#### **Deliver Tools**

A courier can deliver tools to a specific user of the FlexHub. Tools must be marked for delivery using the admin client/tool crib. This is done by navigating to an instance of a tool, under the **Tools** tab. Then the user can either right click on the instance of a tool, or double click on the instance of the tool and click the **Deliver** button in the **Issued** tab. Both instances are shown below.



Access point(s): FlexHub Dashboard after courier user sign in



Required Permission: Tool Courier login.

When to use:

- Returning maintained/repaired tools to a user.
- Replacing a broken/missing tool for a user.
- 1. Log in to the FlexHub and select **Deliver Tools** within the **Tool Courier** workflows. The user will be prompted to select which user they are delivering tools for. Select the user to whom to deliver tools. This will bring up a similar screen as seen before in other workflows with tools pending delivery on the left and the tools to deliver on the right. Click the red arrow to move any **delivery pending tools** to **tools to deliver**.

Select Employee For Tool Delivery		
Socket, Sue		
NT001 / Allen Wrench Set		



Select Tools To Deliver To Socket, Sue				$\bigcirc$
Delivery Pending	⇉	Tools to Deliver		Ħ
Part Number Details		Part Number Details	;	
NT001 Allen Wrench Set 2978B001 12/19/2023 3:13 PM In Trans	•			
			Deliver	
		1		
Select Tools To Deliver To Socket, Sue				
Select Tools To Deliver To Socket, Sue Delivery Pending	⊐	Tools to Deliver		<b>3</b>
Select Tools To Deliver To Socket, Sue Delivery Pending Part Number Details	⊒	Tools to Deliver	Details Allen Wrench Set	E
Select Tools To Deliver To Socket, Sue Delivery Pending Part Number Details	3	Tools to Deliver Part Number	Details Allen Wrench Set Z978B001 12/19/2023 3:13 PM	<u>ج</u>
Select Tools To Deliver To Socket, Sue Delivery Pending Part Number Details	⊐	Tools to Deliver Part Number	Details Allen Wrench Set 297BB001 12/19/2023 3:13 PM In Trans	E t
Select Tools To Deliver To Socket, Sue Delivery Pending Part Number Details	⊒	Tools to Deliver Part Number	Details Allen Wrench Set 297BB001 12/19/2023 3:13 PM In Trans	<b>E</b>
Select Tools To Deliver To Socket, Sue Delivery Pending Part Number Details	∃	Tools to Deliver Part Number	Details Allen Wrench Set 297BB001 12/19/2023 3:13 PM In Trans	€
Select Tools To Deliver To Socket, Sue Delivery Pending Part Number Details	⇒	Tools to Deliver Part Number	Details Allen Wrench Set 2978B001 12/19/2023 3:13 PM In Trans	€
Select Tools To Deliver To Socket, Sue Delivery Pending Part Number Details	₹	Tools to Deliver Part Number	Details Allen Wrench Set 297BB001 12/19/2023 3:13 PM In Trans	<u>ب</u>
Select Tools To Deliver To Socket, Sue Delivery Pending Part Number Details	₹	Tools to Deliver Part Number	Details Allen Wrench Set 2978B001 12/19/2023 3:13 PM In Trans	
Select Tools To Deliver To Socket, Sue Delivery Pending Part Number Details	₹	Tools to Deliver Part Number	Details Allen Wrench Set 297BB001 12/19/2023 3:13 PM In Trans	
Select Tools To Deliver To Socket, Sue Delivery Pending Part Number Details	₹	Tools to Deliver Part Number	Details Allen Wrench Set 297BB001 12/19/2023 3:13 PM In Trans	E +
Select Tools To Deliver To Socket, Sue Delivery Pending Part Number Details	₹	Tools to Deliver Part Number	Details Allen Wrench Set 297BB001 12/19/2023 3:13 PM In Trans	E •
Select Tools To Deliver To Socket, Sue Delivery Pending Part Number Details	3	Tools to Deliver Part Number	Details Allen Wrench Set 297BB001 12/19/2023 3:13 PM In Trans	E +
Select Tools To Deliver To Socket, Sue Delivery Pending Part Number Details	₹	Tools to Deliver Part Number	Details Allen Wrench Set 297BB001 12/19/2023 3:13 PM In Trans	



2. Next the user will select a delivery compartment, with any empty compartments displaying a white box within its borders as shown below. **NOTE: Only the compartments designated for drop-off can be selected** 



Place the tools to deliver in the open compartment and close the door.

#### **Reload Bags**

The **Reload Bags** button allows the user to easily add bags/tags to the compartment designated for bags/tags. For this task the user must first scan their badge, then click on the **Reload Bags** button within the **Tool Courier** options box. The compartment will open, allowing the user to load additional bags/tags. Once completed close the compartment.

Access point(s): FlexHub Dashboard after courier user sign in

Required Permission: Tool Courier login.



**Advanced Features** 



#### ZoomID

## Which tools require tags?

It is not necessary or even desirable to attach Snap-on color stripe tool ID tags to every tool in a toolbox. A tag should be applied to only those tools which require serialized tracking. A list of reasons for tagging your tools should include:

- Calibrated tools
- Inspected tools
- Specialty or Critical tools which require serial identification

## Allowed Number of Tags

Assuming that all of the rules and guidelines of this document are followed, the "practical" limit of the number of tagged tools will less than the "technical" limit of tagged tools. In other words, there is not enough area in a toolbox to hold enough tagged tools to reach the technical limit for tags.

## Tag Reuse

A specific ZoomID tag number can only be used once per L5 Connect system. Every tool must have a unique tag number. To avoid accidental tag duplication, a customer should never order the same tag catalog part number twice.

#### Tag application Orientation



- BEST Tag color stripes parallel to motion of drawer
- OK WITH LIMITS Tag color stripes perpendicular to motion of drawer



• NOT OK - Any application where the color stripes are neither parallel nor perpendicular with the motion of the drawer

#### Area

The visible area of the ZoomID tag on the tool should be maximized. In other words, the more of the tag that can be seen by the cameras, the higher the detection reliability. There are some minimums to keep in mind.



- Top drawers
  - MIN = 0.5"
- Middle Drawers
  - MIN = 1"
- Bottom Drawers
  - MIN = 2"

#### Selecting appropriate tag type

- Large Tags (Preferred)
  - Should be the first choice for all ZoomID tagged tools
  - o Can be used in all drawers when applied in the "BEST" application configuration
  - o Can be used in the top two drawers when in the "OK WITH LIMITS" application configuration
- Medium Tags
  - Should only be used if large tag cannot be applied
  - "BEST" application configuration only
  - Top and middle drawers only (no lower drawers)
- Small Tags
  - Should only be used if large or medium tags cannot be applied
  - "BEST" application configuration only
  - Top two drawers only



#### ZoomID Enabled Option

 Originally, toolboxes would automatically look for ZoomID tags on tools when a drawer was closed. However, this is now a configurable option in the system. By default, the system will look for ZoomID tags. If a situation arises where you would prefer to turn this feature off, this can be done in the Admin application. See the Editing Optical Toolbox Options section of the L5 Connect<sup>™</sup> Locations document for more information on device options.

Top Level Dashboard Locations Tools Q = 2Top Level Name Organizational Location Top Level Profiles Profiles Info Options (Employee) (Group) Inherit options from: Top Level Options -V AUTO SESSION TIME Optical Toolbox 60 Drawer Open Timeout (Seconds) Require drawers opened complet 75 Archive Image Quality Save drawer open archive images Save drawer closed archive image Off Block access when tools issued from the second s 15 Inactivity Timeout (Seconds) Prompt to check in another user's Logout alert warning Zoom ID Enabled

#### 45 Snap-on L5 Connect Admin Client, v:9.13.7.0312

#### **Setup Instructions**

Contact Snap-on Industrial Pro-Services for setup instructions.



Supported Accessories



**Printers** 



# Setting up the Label Printer in L5 CONNECT<sup>™</sup> TRUE CRIB<sup>™</sup> and Administration App

The goal of this document is to describe the configuration of TRUE-CRIB<sup>™</sup> and the L5 Connect Administration application to setup a label printer.

## Configure the Label Printer Hardware

L5 Connect<sup>™</sup> supports the following label printers, transfer ribbon, and labels:

Product	Details	Status
Label Printer	L5W2672073 LABEL PRINTER, Model: Zebra GK420t (203dpi, thermal transfer)	Obsolete
Label Printer	L5W6480135 LABEL PRINTER, Model: Zebra ZD421t (203dpi, thermal transfer)	Active
Ribbon	L5W3111044 Thermal transfer ribbon	Active
Labels	L5W3424726 2" x 1"	Active

To install the label printer, follow the instructions included with the device to calibrate the printer, install the ribbon, and setup the labels.



## Setting the Label Size

- 1. After setting up the printer, you will need to set the label size.
- 2. Open Windows settings -> Devices -> Printers & Scanners.
- 3. Find the Zebra Printer in the list, click on it and then click **manage**.
- 4. Click on **Printer Preferences**, and in the **Page Setup** Tab, under Size, set the **Width** to 2 and the **Height** to 1.

🖶 ZDesign	er ZD421-203dpi ZP	L (Copy 1) Printing P	eferences				×
Printer Setti	ngs						
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🗇 Print	Options	Select:	Custom	-			11
👦 Oper	ration Mode	Media settings	2"				
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Custo	om Commands	Media type:	Labels with gaps 🛛 🗸 📃		Ļ	123	
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🛴 Units	5	Mirror label (			Ļ		
i Help	and About						
Downloa ZebraDe	rint test page ZEBRA d your free copy of esigner Essentials						
				ОК	Cancel	Apply	Help

5. Finally, a test print is necessary to verify that the labels will print correctly. Click on the **Print test page** button within the printer preferences window. **NOTE: This step is required to ensure everything is printed** within the margins of the label. If this step is skipped labels will **NOT print correctly** 



### Setting True-Crib<sup>™</sup> to use the Label Printer

After setting the label size, you will need to associate the printer with the True-Crib<sup>™</sup> software.

1. Start True-Crib<sup>™</sup>, log into the system as an attendant and click the **settings gear** icon. NOTE: You will need to log in with a user that has the **Network Settings** permission to be able to modify the printer setup. The only built in profile that has this setting is the **SuperUser** profile, so any user with the **SuperUser** profile will work.



2. Click the **IT Settings** button.

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	<b>Ма</b>	<b>in Menu</b> Y	Т
Inventory	Device Status	I/T Settings	System Changes
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3. Click the **Printers** button.



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7	DIIE_CDID	) I/T Se	ttings	Attendant	
Syst	Windows Explorer	Task Manager	Date/Time	System Properties	
U: Dev To	View Log File	Card Reader Config	Printers	Network info	
Top Super					
Top Super					

4. Once on the Printers Settings page, click the **pencil** button to the right of **Label Printer**.

	Printers	
Label Printer (Zebra)		
Receipt Printer (Zebra)		

5. Select the Zebra Label printer from the list and click Print.



🖶 Print	×
General	
Select Printer	
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So Microsoft Print to PDF	Search OneNote for Windows 10
Sources Microsoft XPS Document Writer	SzDesigner ZD421-203dpi ZPL
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Status: Ready	Preferences
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Comment	Find Printer
- Page Range	
<ul> <li>All</li> </ul>	Number of copies: 1
C Selection C Current Page	
C Pages:	
	Print Cancel Apply

6. The Printer name will display in the textbox. Click the green  $\checkmark$  button to save.

	Printers	
Label Printer (Zebra)	ZDesigner ZD421-203dpi ZPL	
Receipt Printer (Zebra)		

True-Crib<sup>™</sup> should now be configured to print labels!



# Setting the L5 Connect Administration App to use the Label Printer

- 1. Start the Admin, then log into the system as a user that has the **Network Settings** permission so you will be able to modify the printer setup. The only built in profile that has this setting is the SuperUser profile, so any user with the SuperUser profile will work.
- 2. Switch to the Settings tab, then expand the Local Settings.



3. Click the **Printers** setting.



4. Now follow the procedure in the previous section from step 4 to the end.

Your Admin App should now be able to print labels!



Barcode / RFID Tag Scanners



## Setting up a Zebra DS2208 Wired & DS3678 Wireless Bar Code Scanner in L5 CONNECT™

The goal of this document is to describe the setup of the Zebra DS2208 wired and DS3678 wireless barcode scanners for use with L5Connect software and devices.

## Setting Up the Hardware for DS2208

- 1. Connect the scanner cable to the base of the scanner.
- 2. Connect the other end of the cable to a USB port on the PC of the device on which it will be used.

## Setting Up the Hardware for DS3678

- 1. Connect the hardware cabling as shown in the accompanying **Quick Start Guide** documentation that comes with the scanner, starting with the cradle cable connection. Note that it may take some force to get the cable in all the way so that the latch can properly lock in place.
- 2. Connect the cradle to power and the PC with the USB version diagram of the **Connect Host Interface step** in the documentation.

### Configuring the Scanner

1. Scan the bar code below to return the scanner to factory defaults. You may have to find this barcode in the quick start guide to get it to scan properly.



#### **RETURN TO FACTORY DEFAULTS**

- 2. For the DS3678 scanner only, pair the scanner to the cradle by either inserting the scanner into the cradle or by scanning the bar code in on the cradle.
- 3. Scan the bar code below to set the host interface type. You may have to find this barcode in the quick start guide to get it to scan properly. This will cause the bar code scanner to be configured to scan and report bar


codes in the desired format.



### **IBM HAND-HELD USB**

4. Scan the bar code below to add a (Carriage Return/Line Feed) to the end of the bar code when sent from the scanner. You may have to find this barcode in the quick start guide to get it to scan properly.



ADD AN ENTER KEY (CARRIAGE RETURN/LINE FEED)

You should now be able to use your new bar code scanner to input tags for tools or to select a tool to issue/return.

### **Useful Links**

DS2208 Quick Start Guide DS3678 Quick Start Guide DS3678 Operators Manual



### Industrial Pro-Services

### **Contact Information**

- Email: <u>INDPROSERVICES@snapon.com</u>
- Phone: 1-800-940-2397



### Retrieving Diagnostic Log Files

The purpose of this wiki is to document the process for retrieving diagnostic log files, sometimes referred to as log files, from the L5 Connect system. This will include how to get admin and service log files and how to get the log files from a device.

### Retrieving Admin/Service Log Files

If you only need to get Admin or Service log files this can be done through the Admin application.

Note: These files can also be pulled when pulling the log files for a device. This will be described in the device log file section of this document.

1. Start the Admin application and click the **Settings** tab. **Note: If you are trying to get log files for the** admin app, be sure to start the admin on the computer for which you wish to pull admin logs.





2. Select the **Diagnostics** item from the listbox on the left, then click the **Service Logs** button.



 Use the date pickers to set the Start Date and End Date to cover the timeframe for which you would like to recover logs, then select the appropriate checkboxes in the Include list for the type of logs you wish to pull. Then click the OK button, which looks like a green checkmark.



4. You will then see a file dialog window prompting you to select the directory where you would like to save the zip file of logs. You can set the directory or use the default value. You can also either change the filename or



use the default value. Once you have these values set, click the **Save** button.

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File name: ToolControlSystemLogs20240716.20240723.zip		~
Save as type: Zip files (zip) (*.zip)		~
A Hide Folders Save	Cance	el

- 5. You will now have a zip file saved containing the desired log files.
- 6. Be sure to verify the zip file contains all the appropriate files. See the Verify Zip File section for more details.



## Retrieving Admin Files Manually.

Sometimes you may not be able to get the Admin application or the Service application to start properly. This is one of the prime times you would want to collect log files, but the method described above would not be available. In this case you would need to use the following method to collect these log files manually.

1. Go to the computer of the admin client and open a **File Explorer** window, then type **%programdata%** in as the path and press the **Enter** key.



- 2. Find the Tool Control System directory and double click it to move into that directory.
- 3. In this directory you should see an AdminClient directory. Double click the directory to move into it and then double click the Log directory to move into that one. At this point you will see a list of log files. They are in the form of ApplicationName.FromDateTime.ToDateTime.log. Select the group of log files that cover the time range of interest, then right click on one of them, hover to expand the Send to menu, and finally click the Compressed (zipped) folder option.

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4. You should have a freshly created zip file with the name highlighted so that you can give it a more specific name than the default directory name. Either take the default or make the name more descriptive of what



#### the zip file contains, and you are ready to forward the zip file of logs.

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### Retrieving Service Files Manually.

1. Go to the computer of the service application and open a **File Explorer** window, then type **%programdata%** in as the path and press the **Enter** key.

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h Muric	Recent mes (20)	

- 2. Find the Tool Control System directory and double click it to move into that directory.
- 3. In this directory you should see a Service directory. Double click the directory to move into it and then double click the Log directory to move into that one. At this point you will see a list of log files. They are in the form of ApplicationName.FromDateTime.ToDateTime.log. Select the group of log files that cover the time range of interest, then right click on one of them, hover to expand the Send to menu, and finally click the Compressed (zipped) folder option. NOTE: There will also be a Service\_Config log file here as well. Be sure to include that file too.

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📕 Backup	Service_Config.exe.20221025211201.Current.log	6/13/2024 3:38 PM	Text	
Documents Log Log This PC 3D Objects		Open       Print       Edit with Notepad++		Date modified: 6/13/2024 3:38 PM - 7/ Size: 9.74 MB Date created: 10/25/2022 4:12 PM
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4. You should have a freshly created zip file with the name highlighted so that you can give it a more specific name than the default directory name. Either take the default or make the name more descriptive of what



#### the zip file contains, and you are ready to forward the zip file of logs.

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Backup	Service_Config.exe.20221025211201.Current.	log 6/13/2024 3:38 PM	Text	
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### **Retrieving Device Log Files**

Device log files will be retrieved through the Admin application as well. **NOTE: It is important to remember that the device will need to be connected to the service for this procedure to work.** 

1. Start the Admin application and click the **Locations** tab.

2. Select the device location for which you would like to collect debug data and then click the **Diagnostics** button that looks like a case with a red cross on it.

Snap-on L5 Connect Admin Client, v:9.10.4.0513		- D X
Some	Top Level Change Current Location	Click to logout
	Dashboard Locations Tools Tool States Employees Groups History Reports Settings	
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Name v	Tool Box 1 Optical Toolbox	
* Top Level		
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A Plane Maintenance Hangar	Serial Number (Device) Z41BJ001	
Plane Maintenance Hangar Bay 0	Current Version 9.2.30.0	
Plane Maintenance Hangar Bay 1	Service Connection Offline (2/2/2022 2:32-34 PM)	
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Plane Maintenance Hangar Bay 3		
4 Manufacturing	OS Version	
Assembly Area A	Hardware Info	
Assembly Area A Line 0	Default Tolerance 0	
Assembly Area A Line 1		
Assembly Area A Line 2	- Device Info	
Assembly Area B	Device into	
Assembly Area B Line 0	Customer ID	
Assembly Area B Line 1	Serial Number (Tool)	
Assembly Area B Line 2	Additional Info	
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9		



3. Use the date pickers to set the **Start Date** and **End Date** to cover the timeframe for which you would like to recover logs, then select the appropriate checkboxes in the **Include** list for the type of logs you wish to pull. Then click the **OK** button, which looks like a green checkmark.



4. You will then see a file dialog window prompting you to select the directory where you would like to save the zip file of logs. You can set the directory or use the default value. You can also either change the filename or use the default value. Once you have these values set, click the **Save** button.



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### Alternate Method for Retrieving Log Files from a True-Crib Device

While the log files can be pulled from a True-Crib device with the procedure described above, they can also be pulled directly from the tool crib itself.

1. Start the tool crib and log in as an attendant.

TRUE-CI	<i>RIB</i>	?					Attendant SuperUser	Click to logout
			SC/	AN EMPLOYEE BADGE TO STAR	r		<b>(</b>	<b>~</b> *
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2. Click the **Diagnostics** button that looks like a briefcase with a red cross on it in the top right corner.





3. Set the date range for which you wish to collect the device log, then click the **OK** button that looks like a green checkmark.



This will open a file save dialog box. Make sure the directory where you wish to save the file and the name of the file are what you want and then click the Save button to save the zip file.
 <sup>L</sup>5 Select: Destination

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## Retrieving Device Log Files Manually File Locations

In some cases, you may need to retrieve diagnostic data from a device that can't connect to the service. This section will explain where to find each type of diagnostic file for each of the devices in the L5 Connect System. All the diagnostic information can be found in a program data directory that is in a different location for specific devices. Here is a table that shows the location of the diagnostic data for the different devices in the L5 Connect system.

Device	Diagnostic Data Location
Optical Toolbox	E:\V9\Tool Control System\SmartDevice
RFID Cabinet	E:\V9\Tool Control System\SmartDevice
Tool Crib	C:\ProgramData\Tool Control System\ToolCrib
Portal	C:\ProgramData\Tool Control System\Portal
FlexHub	C:\ProgramData\Tool Control System\ToolKiosk

#### How to Access the File Location

1. Go to the device and click the **Gear** button to open the main menu.





2. Click the **I/T Settings** button.

<b>U</b>	Main Menu		
Inventory	Device Status	Audit	I/T Settings
System Changes	Troubleshooting	Volume	About

3. Scan your badge for access. NOTE: This will only be necessary if you are not currently logged into the device.





4. Click the Windows Explorer button.

	I/T Settings			
Windows Explorer	Task Manager	Network Setup	Hard drive cache settings	
Date/Time	System Properties	View Log File	Card Reader Config	
Calibrate Touch Screen	Network Info	Wireless Info		

- 5. Navigate to the directory specified in the table above for the proper device.
- 6. Collect the required files from the lists below.

#### **Device Log Files**

Device log files contain a great deal of diagnostic information produced by the L5 Connect device application while it is running. They are very useful to helping Snap-on service and engineering personnel the cause of an issue. They will be located in the Log directory. These files have the format ExecutableName.FromDateTime.ToDateTime.log. Here is an example of this format for a toolbox or locker.

- SmartDevice.exe.20230112220714.20230719141555.log 7/19/2023 9:15 AM
- Text Text |

SmartDevice.exe.20230719141555.Current.log

7/17/2024 1:48 PM

You will either need to pull the latest log file or a range of log files to make sure you capture the time period of the event in question.

#### Windows Event Log Files

Windows event log files can sometimes provide insight into errors that occur closer to the operating system level where the device logs might not have any useful information. These files are also located in the Log directory. There are typically three different Windows event log files.

- ..\Log\SerialNumber\_WindowsLog\_Application.evtx
- ..\Log\SerialNumber\_WindowsLog\_System.evtx
- ..\Log\SerialNumber\_WindowsLog\_Security.evtx



#### Database File

The database file for the device will be located in the base program data directory for that device type.

• ..\Device.db

#### Device Config Log

The device config log is a file used by the software to help it configure the device operating system to work properly. This file will be found in the **Log** directory.

• ..\Log\DeviceConfig.log

#### Advanced Device Data Files

Advanced device data files are for additional files that might be useful in diagnosing a problem with the device. This list varies depending on the type of device but all these files are located in the DeviceData directory so you can just pull that entire directory.

• ..\DeviceData

At this point you will have all the device specific diagnostic files collected. It should be noted that the automated version of this also provides the option to get the admin and service logs. Those details are listed in the above sections.



# Verify Zip File

Once you have created your zip file, be sure to open it and verify that all the pieces of diagnostic information are present. Especially when manually collecting device diagnostics, it is very easy to miss something that could cause delays in getting to a solution to your problem. Below is a list of the files that would be collected in the automated methods for comparison. All files are referenced from the "Tool Control System" directory.

### Admin Debug Zip File Contents

..\AdminClient\Log\list of AdminClient.exe log files that capture the date/time of the period of interest.

### Service Debug Zip File Contents

..\Service\Log\list of Service.exe log files that captures the date/time of the period of interest. ..\Service\Log\list of Service\_Config.exe files that captures the date/time of the period of interest.

### Device Debug Zip File Contents

DeviceName	Value
Optical Toolbox	SmartDevice
RFID Cabinet	SmartDevice
True-Crib	ToolCrib
Portal	Portal
FlexHub	ToolKiosk

..\DeviceName\Log\list of DeviceName log files that captures the date/time of the period of interest.

..\DeviceName\Log\SerialNumber\_WindowsLog\_Application.evtx

..\DeviceName\Log\SerialNumber\_WindowsLog\_System.evtx

..\DeviceName\Log\SerialNumber\_WindowsLog\_Security.evtx

..\DeviceName\Log\DeviceConfig.log

..\DeviceName\Device.db

..\DeviceName\DeviceData (the whole directory)