

Snap-on

# L5 Connect™ Administration Guide

Version 3.0

Houston, Cody L 10-20-2022

# L5 CONNECT<sup>™</sup> ADMINISTRATION GUIDE

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# Introduction

Thank you for your purchase of L5 Connect<sup>™</sup>. This guide is the complete resource for managing your L5 Connect<sup>™</sup> Service.

L5 Connect<sup>™</sup> has been built with new features and functionality to manage and use the system more intuitive and user-friendly. If you have used Snap-on Level 5 tool control in the past, some of this may look familiar. However, we strongly recommend that you read this guide carefully as many things have changed in this version.

Within this guide is a detailed manual of the L5 Connect<sup>™</sup> Administration Client. With this, you will be able to create and manage users, groups, Tools and generate reports. This guide covers all the client's features, and by the time you complete this guide, you should be armed with everything you need to administer your new L5 Connect<sup>™</sup> system.

Although this guide covers many topics, we understand you may have questions. If you feel lost or don't understand the content at any time, please get in touch with Snap-on<sup>®</sup> Technical Support.

#### Phone: 1-800-272-2033

#### E-mail: TECHSUPPE@snapon.com

Our technical support agents are standing by, ready to assist you with any questions or issues you may have.

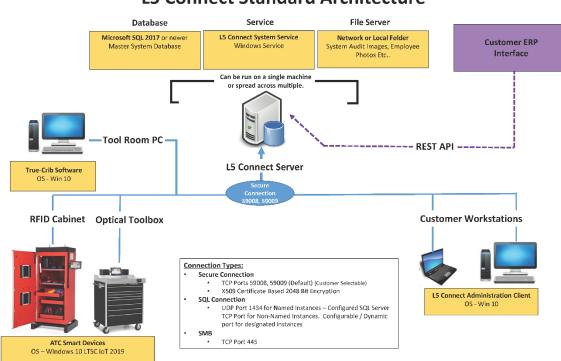
Once again, thank you for your purchase, and welcome to the L5 Connect<sup>™</sup> family.

Note: L5 Connect<sup>™</sup> is an extremely efficient solution to tool control. Yet, a robust Tool Control program with L5 Connect<sup>™</sup> and ATC Devices at its core, integrated with your current processes and procedures, is still needed to ensure successful tool control in your organization.

NOTE: This Guide was written with software version 9.2.31.0 and some screens and features described in this guide may appear differently than in the version you may be using.

# Overview of L5 Connect™

L5 Connect<sup>™</sup> is a complete Tool Control system consisting of several components and devices. You may only use a few of them or use the entire system. This section will give you a brief overview of each of these components to become familiar with them.



# L5 Connect Standard Architecture

## L5 Connect<sup>™</sup> Database

The L5 Connect<sup>™</sup> Database is the data repository that stores all your data, such as users, tools, control states, location information, and other custom data. This database runs as either a SQL Express install or a full SQL Server. The L5 Connect<sup>™</sup> Service manages all Data within this database.

## L5 Connect<sup>™</sup> Service

The core component of the system is the L5 Connect<sup>™</sup> Service. This service is the central hub for all the information used in the system. Therefore, all devices must connect to a supported Windows-based system running this service to function.

NOTE: If the network connection to the L5 Connect<sup>™</sup> Service is interrupted, L5 Connect<sup>™</sup> devices will continue to function while disconnected. The devices will hold their event history in local storage until the connection is reestablished.

### L5 Connect<sup>™</sup> Administration Client

The L5 Connect<sup>™</sup> Administration Client is a management application installed on any supported Windows-based system. All administrative functions, such as the creation and management of users & groups, tool management, report generation, and system setup, are handled by this client. This guide covers the L5 Connect<sup>™</sup> Administration Client in detail.

#### True-Crib™

True-Crib<sup>™</sup> is a L5 Connect<sup>™</sup> device application installed on any supported Windows-based system. A Crib attendant utilizes this application to help manage the issuing and returning of tools from a crib location. This application will need to connect to a L5 Connect<sup>™</sup> Service to function like all other components. While a constant connection to the L5 Connect<sup>™</sup> service is preferred, True-Crib<sup>™</sup> will continue to operate during occasional, short-term connection interruptions. Please refer to the **True-Crib<sup>™</sup> Users Guide** for detailed information about True-Crib<sup>™</sup>.

#### ATC Toolbox

The ATC Toolbox is a L5 Connect<sup>™</sup> device that connects to the L5 Connect<sup>™</sup> Service. This box houses several different types of tools in several different configurations. It utilizes vision technology to issue tools to users. ATC Toolboxes can use both the ZoomID and the FastFlag add-ons. Please refer to the L5 Connect<sup>™</sup> ATC Device Operations Guide for more information about the ATC Toolbox.

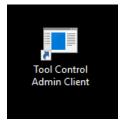
## ATC Locker

The ATC Locker, like the ATC Toolbox, is a L5 Connect<sup>™</sup> device that connects to the L5 Connect<sup>™</sup> Service. This device stores tools that cannot reasonably fit into the ATC Toolbox. The ATC Locker scans for missing tags when the door is closed using RFID tagged tools. If a tag is not detected, the system will issue the tool associated with the missing tag. This device can also come equipped with the FastFlag add-on. You can find more information about the ATC Locker in the L5 Connect<sup>™</sup> ATC Device Operations Guide.

# Administration Client – Getting Started

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>.

To begin, launch the Administration Client. You should be able to find the icon on your desktop. If you do not have an icon, you can launch the client from C:\Program Files (x86)\Tool Control System\Admin Client\Admin Client.exe or wherever you have installed the application.



# Connecting to the L5 Connect Service™

When you launch the application, the system displays a service selection screen.

Select the sy	stem service	connection	
			~
Cancel	Delete	New	Connect

You will need to create a connection profile to the service you want to manage.

Click New; this will open the connection info screen

Enter the serv	ice connection info
Computer Name	localhost
Port	59008
E	HTTPS
Cance	el OK

NOTE: Hostname, Port, and HTTPS settings are set by the administrator in the Service\_Config utility. If you are having issues connecting to your service, please contact your systems administrator.

Type in the hostname of the service you want to connect to on this screen. In this example, you are using localhost. Set the port# to the port the service is running on. The default is 59008. If your service is configured to use HTTPS, click the checkbox. When complete, click OK.

After creating the connection profile, it will show up in the list.

# L5 CONNECT<sup>™</sup> ADMINISTRATION GUIDE

Select the sy	stem service	connection	
localhost			~
Cancel	Delete	New	Connect

Click Connect to access the service.

Once you have connected, you will need to log in with your administration credentials. The credentials you use are determined by the Authentication Type defined in the settings.

The default use	ername and password are:	NOTE: It is recommended to change the
Username:	superuser	password and badge # of superuser as
Password:	superuser	soon as you log in. Please make sure to
Superuser's de	fault badge ID is: <b>14231142</b>	note the new superuser password.

Please enter your username and password User Name Password Cancel Login

Once you have logged in, the **Dashboard** will display.

# Admin Client Authentication

Three authentication methods are available within the L5 Connect<sup>™</sup> to access the Administration Client. You can change the type of authentication by going to **Settings -> Network Setup -> Authentication** in the L5 Connect<sup>™</sup> Admin Client.

STOFT	DETR	Top Level	Change Current Lo		perUser	Click to logout
		Dashboard	Locatio	ns	Tools	Tool States
		Employees	Groups	History	Reports	Settings
<ul> <li>▲ About</li> <li>About</li> <li>Network Setup API Tokens Authentication Local File Servers Service Configuration SMTP</li> <li>System Configuration Diagnostics</li> <li>Local Settings</li> </ul>	Authentication Authentication Mode Self Self Conta Domain B Current W	ained				

NOTE: These Authentication Methods are only used to access the Admin Client. ATC Devices still require the use of a RFID Badge. For more information about ATC Device access see the ATC Device Operation Guide.

**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.

जितन्	nan	Top Level	Change Current L		iperUser	Click to logout
		Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	History	Reports	Settings
About • Network Setup API Tokens Authentication Local File Servers Service Configuration SMTP • System Configuration Diagnostics • Local Settings	Authentication Authentication Mode Self	Contained -				

**Domain Based** – This method utilizes an Active Directory domain to handle the access request. A user account must exist in AD and match the username of an Admin account in the system. You use an AD username and password to access the administrative functions in this mode.

To set the system to use Domain Based Authentication, you must first provide a username and password for that domain so that it can make sure you will have at least one account that can access the system.

User Name	
Password	
<b>Confirm Password</b>	
	OK

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.

Fit	man	Top Level	Change Current L	ocation	SuperUser	Clir	ck to logout
		Dashboard	Locatio	ons	Tools	Tool St	tates
	)	Employees	Groups	Histor	ry Ì Re	ports S	ettings
G	Authentication						
About About API Tokens Authentication Local File Servers Service Configuration SMTP System Configuration Diagnostics Local Settings			credentials				
	Solation		op Level	Change Cur	rrent Location	SuperUser	Click to logout
			Dashboard	_	ocations	Tools	Tool States
			Employees	Groups	Histor	y Reports	s Settings
		thentication					
	A Network Setup API Tokens Authentication Local File Servers Service Configuration	thentication Mode Current uthentication Domains IFC domain.com + + +	t Windows User \vee				

**Current Windows User** – This method will allow users to access the admin client without typing in a username or password (Single-Sign on). It utilizes the current windows session to log the user in. You simply need to add a domain or computer name to the Authenticated Domains list. When logged into Windows, a valid user is automatically granted access to the system when they launch the client.

### **Common Controls**

The admin client's main control elements present on all main screens are the session bar and the Navigation tab. You will see these on each screen while in the program.

		Session Bar	
Gorogo an	Top Level	Change Current Location	Click to logout
	Dashboard Locations	Tools   Tool States   Employees   Groups   History   Reports   Settings   Navigation Tabs	

#### Navigation tabs

Dashboard Locations Too	s Tool States	Employees	Groups	History	Reports	Settings
-------------------------	---------------	-----------	--------	---------	---------	----------

Atop the **Dashboard**, you will see a collection of navigation tabs. From here, you can access the features of the client:

**Locations** – Logically organize your environment into categories and sub-categories for ease of management.

Tools – Create and manage all the tool assets in the system.

Tool States – Real-time view with filters based on reports and statuses for tool assets.

Employees – Create and manage employee access and permission assignments.

- **Groups** Organize Employees into groups to improve ease of management and role changes.
- History Log every event in the system with active filters and forensic modes.
- **Reports** Create, run, and schedule automated reports that can be customized and shared.
- **Settings** The settings for the service and Admin Client to customize L5 Connect<sup>™</sup> to your needs.

#### Session Bar

The **Session Bar** at the top of the admin client screen informs you which **Employee** is currently logged in and the current **Location View**. You can change the current **Location View** and log out of the system here.

Top Level Location View						-	٥	×
	Top Level	Location View	Change Current Location	SuperUser	Currently Logged in User	Clic	k to loo	aout

When you click the **Currently Logged in User** button, your session will end, and you are returned to the login screen.

NOTE: You will not be able to log out if you have any pending changes. You must commit or cancel those changes before you may log out.

The **Location View** acts as a filter and determines what objects and devices you can view and modify. You can click on the **Location View** button to filter your view based on the location tree.

		Maintenance	SuperUser	Tout
	Select Current Location			our
	Top Level			
	Maintenance     54" Toolbox			
	<ul> <li>Manufacturing True-Crib</li> </ul>			e Too
Syste Us Devi	inge-Cib			100
Toc				
Тор				stinati

As you can see, our Location View has now changed; you can only see objects and devices within the Maintenance sub-location.

		-	Maintenance Change Current Location	Click to logout
STEP		16	charge carrier counter	click to logour
			Dashboard Locations Tools Tool States Employees Groups History Reports Settings	
			Device Status 🗸 🗆 Hide OK Hems Alerts: Work Location Status 📢 🗆 Hide OK Hems Alerts:	
			Name Alerts Issued Issued Users Mrgd Out Alert Device Tool Name Alerts Issued Issued Users Issued Devices Mrgd Out Alert Device Tool	
System Status	<u>Filtered</u>	<u>Total</u>	54' Toothox 0 0 0 0	
Devices Online :	1	2		
Devices Offline :	0	0		
Tools Issued :	0	0		
Users with Tools Issued :	0	0		
Devices with Tools Issued :	0	0		
Tools Issued with Alerts :	0	0		
Managed Tools Out :	0	0		
Tools Managed :	613	885		
Top Employees with Issued Tools	Ton	Work Loca	tions with Issued Tools Ton Daviess with Issued Tools Perant Events	

# Dashboard

The **Dashboard** is the home screen of the admin client comprised of customizable widgets. In addition, it displays real-time data of all your L5 Connect<sup>™</sup> Device's statuses and alerts.

नित्तन	7		Top Level		Change Current Location	SuperUse	r					Click to logout
	2		Dashboard Locations T	ools   Tool States   Employees	Groups History Re	ports Setting	5					
			Device Status 🗸 🗆 Hide OK In	ems Alerts:		Work Location	Status 🗸	🗆 Hide	OK Items	Alerts:		
			Name Alerts Issued Use	rs Mngd Out Alert Device Tool		Name Alerts Issu	ed Issued User	s Issued Dev	vices Mngd O	ut Alert Device	e Tool	
	Filtered		True-Crib 0 0 0	0								
Devices Online :		2										
Devices Offline :		0										
Tools Issued :		0										
Users with Tools Issued :		0										
Devices with Tools Issued :		0										
Tools Issued with Alerts :		0										
Managed Tools Out :		0										
Tools Managed :	885	885										
Top Employees with Issued Tools	Τομ	p Work Loca	tions with Issued Tools	Top Devices with Issued Tools	Recent Events	^						
					Time	Action	Part Number	Employee		Destination		
					2/9/2022 3:10:1 2/9/2022 3:10:1				54° Toolbox 54° Toolbox			
						PM Box Startup			True-Crib			

## Widgets

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**

Although the widgets themselves are not modifiable, you can change the Dashboard layout. To do this, you must access the **Dashboard Editor**.

To access Dashboard Editor, you need to go to Settings -> System Configuration-> Dashboard

=>	Dashboard: Custom
About Network Setup System Configuration Dashboard Device Global Settings Issued Tool Past Due Profile Granting Profile Permissions Tracking Bags	Personal 🖉 🗙 Global 🖉 🗙

There are two modes here, Personal and Global.

**Personal** – Customize your Dashboard to a view that only you can see when you log in.

Global – Customize the Dashboard to a view that all users will see.

NOTE: To set a global layout, you will need to have appropriate permissions. If you set a personal layout, it will display, even if a global layout is defined.

Whichever mode you select, press the 🥕 button to open the **Dashboard Editor**.

To clear a saved layout, click the  $\times$  button.

			Top Level			Change	Current Location	SuperUser	Click to logout
Editing:	Personal	Custom	Dashboard Locations	Tools	Tool States   Employ	ees Groups	History R	eports Settings	
1 2 3	- 4	X	Device Status 12 🗆 Hid		Alerts:		()	Y T	×
		_	Name Alerts Issued Issu			Tool		Name Alerts Issued Issued Users Issued Devices Mngd Out Alert Device Tool	
System Status	Filtered	Total	54" Toolbox 1 0 True-Crib 1 0	0 0		SimulatorToolbox54 ToolCrib			
Devices Online :	0	0							
Devices Offline :	2	2							
Tools Issued :		0							
Users with Tools 😡ed :	0	0						<li>(1)</li>	
<b>Devices with Tools Issued :</b>	0	0						_	
Tools Issued with Alerts :	-	0							
Managed Tools Out :		0							
Tools Managed :	885	885							
		<b>N</b>					,	x.	<b>N</b>
Top Employees with Issued Tools	🗙 Toj	Work Loca	tions with Issued Tools	χ Τορ D	evices with Issued Tool	· 🛛 🗙	Recent Event		$\mathbf{X}$
	_			_			Time Action P	art Number Employee Source Destination	_
					(1)				
	<b>N</b>						-		
	1			2		5			N.

The **Dashboard Editor** controls are located in the top left-most corner of the screen.

- 1. Add a Widget This allows you to pick from the Widget library and add one to the screen.
- 2. Save Current Layout saves current layout and exits the editor.
- 3. Cancel Changes discards change and exits the editor.
- 4. Current Layout displays the current mode you are editing.

Each widget in the **Dashboard Editor** has three controls to modify its Location on the screen:



Resizes the Widget

Moves the Widget

Removes the Widget

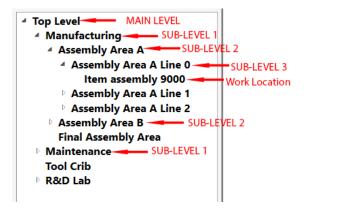
NOTE: The contents of the widgets are not customizable. You may only change the location of the widgets and the layout of the dashboard.

# Locations

One of the most critical concepts in this guide 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 shows a sample **Location Tree**. The **Top Level** is the highest Location on the tree. This Location is the **Main** or **Top Level** and represents the organization.



NOTE: You can only have one Top Level Location in an Organization.

You have four sub-levels under the Top Level: **Manufacturing, Maintenance, Tool Crib, and R&D Lab**. These sub-levels or **Child Locations** are nested within the **Top Level**. These locations can represent either a department or a physical location.

As you can see, a **Child Location** can also have sub-levels. All **Child Locations** 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 sub-levels to organize your employees and devices based on their primary work locations. For example, EmployeeA works on assembling a new part. The part is **Item assembly 9000**. You know that part will be on **Assembly Area A Line 0**. EmployeeA does not work on any other part. So, you can place EmployeeA in the Location of **Assembly Area A Line 0**.

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

EmployeeB 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, EmployeeB 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.

## Location 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 on the **Options Tab** of the **Location Object** Properties Screen.

	Profiles	Profiles	·		r	r	)
Info	(Employee)	(Group)	Options	Subscriptions	Audit Types	Quantity Monitoring	
Inheri	t options from	Top Level	-				
Optio	ons ———						
Engli		age					
		-	t (Seconds)				
_			eout (Seconds)	de)			
			in another u				
			opened com				
		e Work Ord		piecely			
		/e Image Qu					
			archive ima	des			
			ed archive in				
Singl		Alert Level		<b></b>			
		it alert warr	nina				
			e Signature				

By default, all child objects inherit their settings from their parent. But you can change these settings if you need to. To disable inheritance, uncheck the box at the top of the Options List.

	(Employee)	(Group)								
☑ Inherit options from: Top Level										
Optio	ons ———									

NOTE: More information on the other tabs of the location object can be found in the different sections of this guide, the ATC Device Operation Guide, and the True-Crib<sup>™</sup> User Manuel.

#### 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.

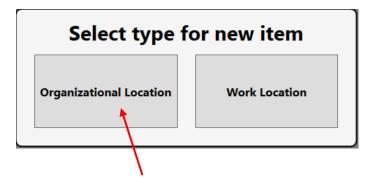
**Work Location** – This type represents where work occurs and where the tool is. It can be a bay or a specific object.

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 at the bottom left of the Locations Tab.

STOFT	ロヨフル	Top L	.evel	c	hange C	Current Location		perUser	Click to logou
			Employees	<u> </u>	Group	os i H	listory	Report	s Settings
			Dashboar	ď		Locations		Tools	Tool States
Name     Image: A state of the state	<b>Top Level</b> Organizatio	nal Locat	ion						
Manufacturing Tool Crib	Info	rofiles Group)	Options	Subscrip	otions	Audit Types	Quantit	y Monitoring	
Show Delved Items	Name Customer ID Notes Parent Location Responsible Employee		)						

When you click on that button, you need to select which type of location object you want to create.



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. Create an **Organizational Location** named **R&D Lab** to place the **Work Location** named **Prototype 0001** within. After clicking on the new Location button, click on **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.

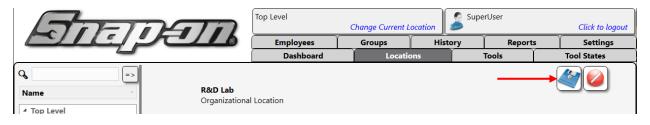
Parent Location – Designates which Location Object is the Parent of this Location.

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

Let's name this new location object **R&D Lab**. This Location doesn't go under Maintenance or Manufacturing, so set its **Parent Location** to **Top Level**.

ADET		Top Level	Change	Current Locatio		uperUser		Click to logout
	ロヨコ	Employees	Grou	ps	History	Rep	orts	Settings
		Dashboar	rd	Locations	r -	Tools	-Y	Tool States
Name	Organizationa	l Location						
Maintenance Manufacturing Tool Crib		files oup) Options	Subscriptions	Audit Type	5			
	Name R& Customer ID Notes							
	Parent Location Top	o Level 🥒 🗲						
Solar	t home location	To	op Level	Channa C	and the state	Super	rUser	Clieber Inge
	Vevel Maintenance Manufacturing							
				<b>Ø</b> ]				
sho	ow Deleted items							

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.

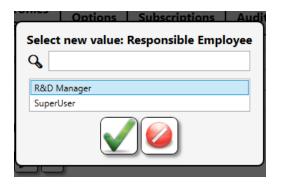


Now that you have created the location object set the **Responsible Employee** to **R&D Manager.** If the user doesn't exist, you will need to make it. (See Creating an Employee in the Employees section of this guide).

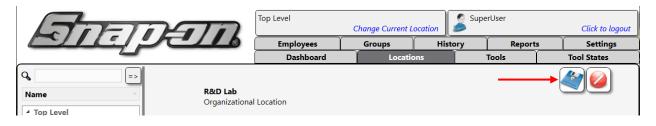
Click on the 🥓 icon to bring up the Employee Selection dialog.

ADEL		<b>T</b> 1	Тор	Level	C	hange Cui	rrent Location	Supe	erUser	Click to logout
			8	Employees	) _	Groups	н	istory	Reports	s Settings
				Dashboar	rd Ŭ	L	ocations		Tools	Tool States
Name     4 Top Level     Maintenance		<b>R&amp;D La</b> Organiz	<b>b</b> ational Loca	tion						
Manufacturing R&D Lab	Info	Profiles (Employee)	Profiles (Group)	Options	Subscrip	tions	Audit Types	Quantity	Monitoring	
Tool Crib	Resp		ne R&D Lab ID es on Top Leve							

Click on R&D Manager to select it, and then click on the  $\checkmark$  check button to set it as the responsible Employee.



NOTE: You will only see employees who have a profile assigned to the location or it's parent. More information on how to assign a profile to an employee can be found in the Profiles section of this guide. Once again, click on the blue Save button in the upper right-hand corner of the screen to apply your changes.



With the new Organizational Location added, it is time to add the prototype **Work Location**. Begin by clicking on the **New Location Object** button like before.

ADEL	n a n	Top Level	Change (	Current Location	SuperUser	Click to logout
	DIN	Employees	Group	os H	listory Repor	ts Settings
		Dashboar	rd j	Locations	Tools	Tool States
Name     >       Image: A state of the state of	<b>Top Level</b> Organization	al Location				
Manufacturing Tool Crib	Info	ofiles roup) Options	Subscriptions	Audit Types	Quantity Monitoring	
Show Deleved Items	Name Tr Customer ID Notes Parent Location ( Responsible Employee	2 X				

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



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.

NOTE: More information on templates can be found in the Work Location Templates section of this guide.

**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.

Call this work location Prototype 0001. Set the parent location to R&D Lab (if it hasn't already).

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.

ATT	ロヨフト	Top Level	Change Cu	rrent Location	SuperUser		Click to logout
		Employees	Groups	Hi	story	Reports	Settings
		Dashboard	L	ocations	Tools	1	Tool States
Name → Top Level Maintenance Manufacturing R&D Lab Tool Crib	Into (Employee) (Gro	files	ubscriptions	Audit Types			
	Parent Location R&	D Lab					
	Responsible Employee	<u>الا</u>					
	Template						
	Tag 🖉	? ▼					
Show Deleted Items							

# Editing a Location

Sometimes you need to make a change to a **Work Location** or **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: UI	ntil a change is n	hade, the Sa	ave and Ca	ncel butto	ns will not <mark>b</mark>	<mark>be visible.</mark>
ATT	nan	Top Level	Change Curre		uperUser	Click to logout
	I E III	Employees	Groups	History	Reports	Settings
_		Dashboard	Loc	ations	Tools	Tool States
Name	Prototype 000 Work Location					
Manufacturing ₄ R&D Lab	Info Profiles Pro (Employee) (Gro	files Options	Subscriptions			
Tool Crib		ototype 0001				
Show Deleted Items						

Change the **Customer ID** to this Work Location to **PN12345ABC**. Then you will click on the Save Icon to commit the change.

GOFT	a data	Top Level	Change C	Current Location	SuperUser	r	Click to logout
	I III	Employees	Group	os H	listory	Reports	Settings
		Dashboard	a )	Locations	Tools	<b>,</b>	Tool States
Name	Prototype 000 Work Location						
Manufacturing 4 R&D Lab		files oup) Options	Subscriptions				
Prototype 0001 Tool Crib	Name Pro Customer ID PN Notes Parent Location R& Responsible Employee						
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.

You will edit the **R&D Lab Location** and change its parent location from **Top Level** to **Maintenance**.

		2	Level	Change C	Current Location	Sup	erUser	Click to logout
	Ð	6 —	Employees	Group	ps H	listory	Reports	Settings
			Dashboar		Locations	, in the second se	Tools	Tool States
Name		ational Loca	tion		~			
Manufacturing	Info Profiles (Employee)	Profiles (Group)	Options	Subscriptions	Audit Types	Quantity	Monitoring	
Prototype 0001 Tool Crib		ne R&D Lat						
	Parent Locatio							
	Responsible Employ	ee 🖉 😕	< .					
Show Deleted Items	Select home loca Top Level Maintenance Manufacturing	ation		Top Level			SuperUser	

Once you save the change, the location object **R&D Lab** will move to its new Location underneath **Maintenance**.

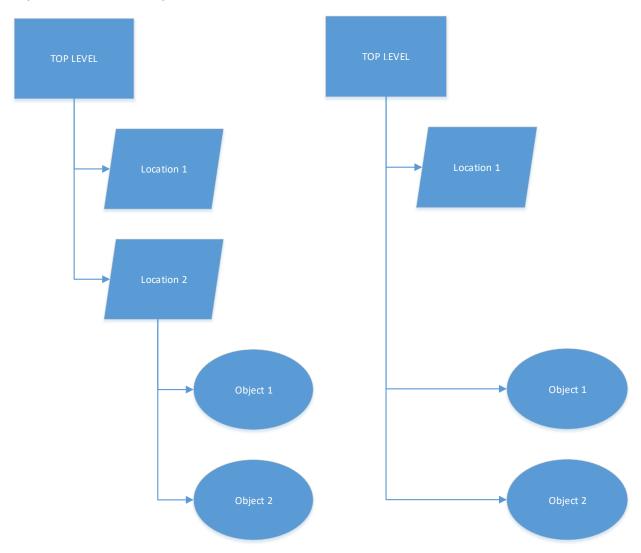
# L5 Connect<sup>™</sup> Administration Guide

Fire	ロヨフト	Top Level	Change C	urrent Location	SuperUser	Click to logout
		Employees	Group	s H	istory Repo	rts Settings
		Dashboard	ł	Locations	Tools	Tool States
Name	<b>R&amp;D Lab</b> Organizationa	al Location				
✓ R&D Lab Prototype 0001		ofiles roup) Options	Subscriptions	Audit Types	Quantity Monitoring	
Manufacturing Tool Crib	Name R8	እD Lab				
	Customer ID					
	Notes					
	Parent Location Ma	aintenance 🖉				
	Responsible Employee					
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.



To Delete a Location, select it from the location tree. Then click on the Red Delete button on the lowerleft corner in the locations tab.

STOFT	DETR	Top Level	Change C	Current Location	SuperUser	Click to logout
		Employees	Group	s H	istory Repor	rts Settings
		Dashboar	d )	Locations	Tools	Tool States
Name     * Top Level     * Maintenance	<b>R&amp;D Lab</b> Organizationa	al Location				
✓ R&D Lab Prototype 0001		ofiles roup) Options	Subscriptions	Audit Types	Quantity Monitoring	
Manufacturing Tool Crib	Name R	&D Lab				
	Customer ID					
	Notes					
	Parent Location M	laintenance 🖉				
	Responsible Employee					
Show Delete stems						

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**.



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**.

STEPST	Top Level	Change Current Lo	ocation	perUser	Click to logout
	Employees	Groups	History	Reports	Settings
	Dashboard	Locatio	ons	Tools	Tool States
Top Level     Maintenance     Prototype 0001     Manufacturing     Tool Crib					
Show Deleted Items					

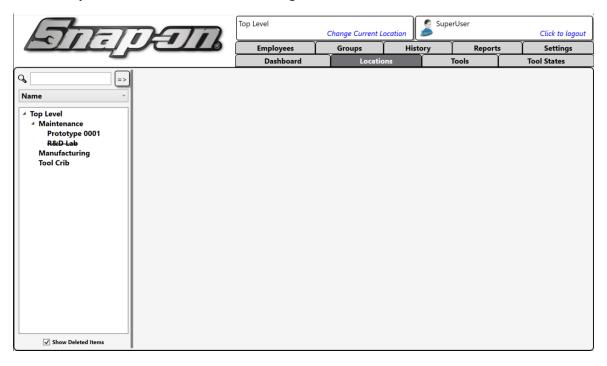
### Restoring a Location

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.

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

जित्त्वार्ग्र	Top Level	Change Current Lo		perUser	Click to logout
	Employees	Groups	History	Reports	Settings
	Dashboard	Locatio	ns	Tools	Tool States
Name  Top Level  Top Level  Maintenance Prototype 0001 Manufacturing Tool Crib					
Show Deleted Items					

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 ——— through the name.



Once selected, click on the show Deleted button to restore the Location. Next, you can uncheck the Show Deleted Items checkbox.

		Top Level SuperUser Click						
	ELL	Employees	Group	~	istory	Reports	Settings	
		Dashboar		Locations	~	Tools	Tool States	
Image: Show Deleted It mus	<b>R&amp;D Lab</b> Organizational							
ितन्	DETR	Top Level	Change C Group	urrent Location	Superistory	erUser Reports	Click to logout	
)		Dashboar	d Ì	Locations	1	Tools	Tool States	
A Top Level A Maintenance Prototype 0001 R&D Lab		files oup)	Subscriptions	Audit Types	Quantity	Monitoring		
Manufacturing Tool Crib		211						
	Name R& Customer ID							
	Notes							
	Parent Location Ma							
	Responsible Employee	1 ×						
Show Deleted Items								

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**.

	77	Top Level Change Current Location						
all for	Employees	Groups	History	Reports	Settings			
		Dashboard	Locat	ions	Tools	Tool States		
Name	Prototype 000 Work Location Profiles (Employee) Profiles (Employee) Profiles (Gro Customer ID Notes Parent Location Ma nsible Employee Template Tag	files Options Stotype 0001	Subscriptions					
		Top Level			SuperUse			
Harriel.			Ŷ	nge Current Location	n P	Ŷ	to logout	
			ashboard	Locations	Tools			
Name       * Top Level       * Maintenance       * R&D Lab       Prototype 0001       Manufacturing       Tool Crib	Wor Info Profiles (Employe Custor Parent Lo Responsible Emp	e) (Group) O Name Prototype 000 ner ID Notes cation R&D Lab	Subscriptio	ins				
Show Deleted Items								

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

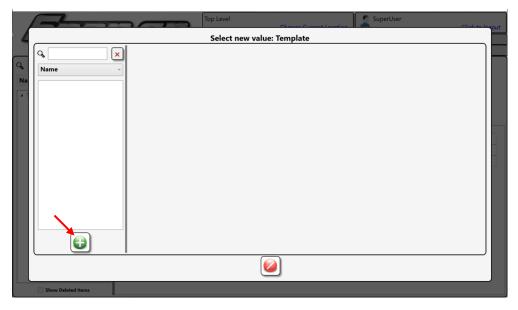
## Work Location Templates

**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.

To create a **Work Location Template**, select a **Work Location**. From the properties, click on the  $\checkmark$  icon next to Template. This button will display the Template selection screen. Click on the 📦 button to create a new template.

FIFT	ロヨフト	Top Level	Change Current L		erUser	Click to logout
CIE,		Employees	Groups	History	Reports	Settings
		Dashboard	Locatio	ons	Tools	Tool States
Name	Info	files	bscriptions			
Manufacturing	(Linpidyce) (dir					
Tool Crib	Name Pro	ototype 0001				
	Customer ID					
	Notes					
	Parent Location R8	tD Lab 🧷				
	Responsible Employe	/×				
	Template					
	Tag 🖉					
Show Deleted Items						



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

		Top Level	SuperUser	
4		Select new value: Templa	te	
d Na	Name	Name PLANE Assigned Sub Locations		
			Available Sub Locations	Assigned Sub Locations: PLANE
			Q.	
				•
	Show Deleted Items	 		•

To create a sub-location, Type the name of the Sub-Location and press the 
button. This button will add it to the list. For the **PLANE** Template, you will add the following sub-locations:

- Cockpit
- RWing
- LWing
- Engine
- Cabin

Once you have added all the sub-locations, you will see them in the list of **Available Sub Locations**.

Available Sub Locations	Assigned Sub Locations: PLANE
Q	
Cabin	
Cockpit	
Engine	
LWing	
RWing	<ul> <li>★</li> <li>★</li> </ul>

Available Sub Locations	Assigned Sub Locations: PL	ANE
Cabin Cockpit Engine LWing RWing		
	Available Sub Locations          Cockpit         Engine         LWing         RWing	Assigned Sub Locations: PLANE

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 of 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  $\checkmark$  button when you have finished assigning all of the sub-locations.

Available Sub Locations	Assigned Sub Locations: PLANE
	Cabin Cockpit Engine LWing RWing

You are now back on the Template selection screen where the newly added Sub-location is now listed. Click on the SAVE button to save the Template.

		Top Level	Click to logout
		Select new value: Template	- new to logout
	9	X Name PLANE	
0	Name	Assigned Sub Locations 🖉	
Na		Name Enable Work Order Entry	
		Cockpit	
1		RWing	
		Engine	
	Show Deleted Items		

It will be added to the list of Templates and will become available for all Work Locations. Click the  $\checkmark$  button to add it to the Work Location.

		Top Level	SuperUs	er Cliekte legout				
4		Select new value: Te	mplate					
	PLANE	Name PLANE         Assigned Sub Locations         Name Enable Work Order Entry         Cabin         Company         Wing         Wing         Wing	Contraction     Contraction	Prototype 0001 Work Location Info Profiles Profile (Employee) (Group Name Foto Customer ID Notes Parent Location R&D L Responsible Employee () Template PLANE Tag ()	ype 0001	Change Current Location	SuperUser Tools	Click to logout Settings Tool States
			Show Deleted Items					

To remove a Template from a Work Location, click on the  $\times$  button beside it. To commit changes, click the SAVE button at the top right of the screen.

# Employees

Employees are the user accounts used to control the access and administration of L5 Connect<sup>™</sup>. 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.

ATT	ロモフル	Top Level	Change Current Lo		erUser	Click to logout
		Dashboard	Location	ns	Tools	Tool States
1		Employees	Groups	History	Reports	Settings
Name     SuperUser	SuperUser	erships Subscriptions				
	Last Name SuperUser First Name M. Initial Title Customer ID Email Cell Phone Home Location Top Level Language Device Defi	_	1e ·		Badge Info Badge 🗸 🗙 Temp Badge 🖉 🗙 Photo —	
Show Deleted Items	Admin Login User Name superus Change Password	ier Clear Li	ogin		X	

# NOTE: The Last name field is required. NOTE: No two employees can have the same Customer ID. NOTE: Cell Phone Number is currently only supported in the US. Carriers supported: AT&T, Verizon, Sprint, and T-Mobile.

The attributes of the Employee are:

Last Name, First Name, and M. Initial – The name of the Employee.

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.

**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.

**Home Location** – Employee's Location in the system. Usually, this is done logically but could also represent the Employee's primary work location. 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.

नित	- 7				Top Level		Cha	inge Current	t Location	Sup	erUser		Cl	lick to log	gout
				B	Employ	yees 📐	í d	Groups	Ні	story	Rep	orts	) s	Settings	
	ے				Dash	board		Locat	tions	T T	Tools		Tool S	States	
			Device	Status 🗸	Hide OK Items	Aler	ts.		Work Loc	ation Statu	ıs 🗸 🗆 I	Hide OK Iter	ms		Aleı
System Status	liter	ed Total	Name	Alerts Issued	d Issued Users Mng	d Out Aler	t Devid	ce Tool	Name	Alerts	Issued Issued	Users Issue	d Devices	Mngd Out	Alert
Devices Online :	1	1	Tool Cri	b 0 0	0	0			Prototype	0001 0	0 0		0	0	
Devices Offline :	0	0													
Tools Issued :	0	0													
Users with Tools Issued :	0	0													
Devices with Tools Issued :	0	0													
Tools Issued with Alerts :	0	0													
Managed Tools Out :	0	0													
Tools Managed :	1	1													
			<					>	<						
	ΞŶ		:		Y <del>z a i</del>			Y	<u> </u>					_	_
Top Employees with Issued	10	Top Wor	k Locatio	ns with Issu	Top Devices	with Issue	d Tools		ents						_
	- 1							Time		Action	Part Number	Employee	1	Destinat	ion
	- 1							3/16/2022	12:46:11 PM	Box Startup			Tool Crib		
	- 1														
	- 1														
	- 1														
	- 1														
	- 1														
	- 1														
	- 1														
					l			l							

On the bottom left of the Employees screen, click on the Green + icon. This button will open the New Employee Properties sub-tab.

STOFT	つきつる	Top Level	Change Current Loc		erUser	Click to logout
CIE,		Dashboard	Location	s	Tools	Tool States
		Employees	Groups	History	Reports	Settings
SuperUser	SuperUser	erships Subscriptions	1			
	Last Name SuperUser First Name M. Initial Title Customer ID		1		adge Info Badge 🗸 🗙 emp Badge 🧷 🗶	
	Customer ID Email Cell Phone Home Location Top Level		ne ×	P	hoto ———	
Shew Deleted Items	Admin Login User Name superu Change Password		ogin			

#### L5 CONNECT<sup>™</sup> ADMINISTRATION GUIDE

STOFT	n ann	Top Level	Change Current Loco	ation	erUser	Click to logout
	JE II	Dashboard	Locations	;	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Name       SuperUser	Info Profiles Me	mberships Subscriptions				
	Last Name			ſ	adge Info —	7
	M. Initial Title			т	Badge 🖉 🗙 emp Badge 🖉 🗙	
	Customer ID			[	hoto —	
	Email Cell Phone	Carrier Non	e ×			
	Home Location Top Leve	<u> </u>				
	Language Device	Default		~		
		Create Login				
Show Deleted Items						

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  $\checkmark$  icon. This button will bring up the Location select screen. Select R&D Lab, then click on the  $\checkmark$  button.

		Top Level	See 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 19	SuperUser	
	Select home location		Channa Coursent Location II	Clieb to La pout	NOT
	✓ Top Level				
	<ul> <li>Maintenance</li> <li>R&amp;D Lab</li> </ul>				Loca
S	Manufacturing				defa
Na					uera
Su					Curre
					the A
					work
					see t
					secti
					guid
					infor
			_		
	Show Deleted Items				

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. 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.

STOFT	DETT	Top Level	Change Current L		perUser	Click to logout
		Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Name     SuperUser	Info Profiles Ma	emberships ) Subscriptions				+ 🥙 🧭
	Last Name Smith			c	Badge Info —	_
	First Name John				Badge 🖉	<b>_</b>
	M. Initial J					
	Title				Temp Badge	×
	Customer ID 12345A	BC		c	Photo ———	
	Email jjsmith@					
	Cell Phone 555123	9876 Carrier A	T&T ~			
	Home Location R&D La	b 🖉				
	Language Device	Default		~		
	∫Admin Login —			]		
		Create Login				
		5				
Show Deleted Items						

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

STOFT.	DETI	Top Level	Change Current Lo		erUser	Click to logout
		Dashboard	Locatio	ns	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Name     ×       Smith, John J.     SuperUser	Smith, J 12345Al		s			
	Last Name Smith First Name John			[ <sup>E</sup>	Badge Info	7
	M. Initial J				Badge 🖉 🗙	j i
	Title			I	Temp Badge 🖉 🗙	
	Customer ID 12345	ABC			hoto ———	
	Email jjsmith	@contoso.com		[ •	noto	
	Cell Phone 55512	39876 Carrier	T&T ~			
	Home Location R&D L	ab 🖉				
	Language Devic	e Default		~		
	r Admin Login —					
		Create Login				
Show Deleted Items						

#### 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 administrate 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 Employee List.

जित्तार्ग्री	Top Level	Change Current Location	SuperUser	Click to logout
	Dashboard	Locations	Tools	Tool States
<b>U</b>	Employees	Groups	listory Report	s Settings
Name Smith, John J. SuperUser				
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 & Customer ID Search

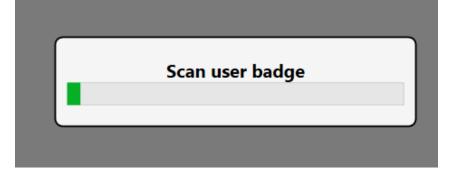
Go to the search bar, make sure the **Name** is selected and start typing the name. As you type the name John, the list will filter. **Customer ID** search works just like **Name** search, except you type in the Customer ID value instead of the name.

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.

ADEL		Top Level	Change Current Loca	tion Su	perUser	Click to log	gout	
		Dashboard	Locations		Tools	Tool States		
		Employees	Groups	History	Reports	Settings		
Name       Smith, John J.	For	-10-01	Top Lev	/el	Change Current	Location	SuperUser	Click to logout
				Dashboard	Locat	ions	Tools	Tool States
			E	mployees	Groups	History	Reports	Settings
Show Deleted Items	Customer ID Smith, John J.	×						

#### Badge Search

**Badge Search** requires that you have a compatible card reader to scan the user's Badge. Upon completion of the scan, the user's information is displayed.



## Editing an Employee

When you need to make a change to an employee, you must edit the user account. First, the Admin must have permission to the Employee's Home Location to edit an employee. Next, add a badge and a photo to the user account with your sample employee.

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**.

ATT	DÐ		Top Level	Change Current		uperUser	Click to logout
			Dashboard	Locati	ions	Tools	Tool States
			Employees	Groups	History	Reports	Settings
Smith, John J.		mith, John J. 2345ABC 5 Membe		-			
	Last Name First Name					Badge Info —	
	M. Initial					Badge 🖉	×
	Title	·				Temp Badge 🖉	×
	Customer ID	12345ABC				DL	
	Email	jjsmith@cont	toso.com			Photo ——	
	Cell Phone	5551239876	Carrier A	т&т ~			
	Home Location	R&D Lab	2				
	Language	Device Defa	nult		÷		
	∫ Admin Logi	n ———			]		
			Create Login				
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.

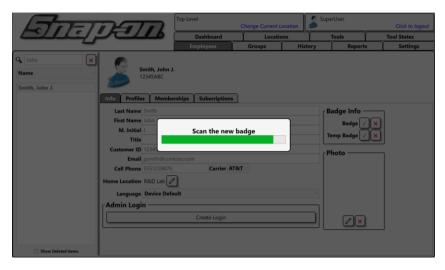
NOTE: Until a change is made, you are not in edit mode and the SAVE and CLEAR buttons are unavailable.

#### Adding a Badge

On the info tab, go ahead and add the Employee Badge to the user. This button is a primary badge, and access will not expire. Next, click the 🥕 by **Badge** in the **Badge Info** box on the right side of the screen.



You will then scan the Employee Badge.



After a successful Badge scan, the  $\checkmark$  button will change to a  $\checkmark$ . With the added Badge, you can now click on the save button to save the changes. Even though the badge has been added to the Employee, they still do not have access to any devices until assigned a profile. Please see the profiles section of this guide for more information.

ADEI	DETA	Top Level	Change Current La		perUser	Click to logout
Cli		Dashboard	Location	ns	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Q John X Name Smith, John J.	Smith, Jo 12345ABC		٦		2	
	Last Name Smith First Name John			[	Badge Info — Badge 🗸 🔀	อ
	M. Initial					31
	Title				Temp Badge 🖉 >	
	Customer ID 12345A	BC			Photo ———	_
	Email jjsmith@	and the second se				
	Cell Phone 5551239	0876 Carrier AT	™84T ~			
	Home Location R&D La	b 🖉				
	Language Device	Default		~		
	Admin Login					
		Create Login				
Show Deleted Items						

#### Adding a Temporary Badge

When a user forgets or misplaces their Badge, or you have a user that only needs access for a limited amount of time, you can assign a **Temp Badge**. A **Temp Badge** is similar to regular badge access, except you set it to expire on a date & time that you put in the Employee Properties. This button allows an admin to issue a badge to a user who only needs it for a short time. Temp Badges can grant temporary employees and some Vendors who only need quick access to ATC Devices.

To add a **Temp Badge**, you need to bring up the Employee's properties page. And click on the *P* button by **Temp Badge**.

Badge Info	
Badge 🖉 🗙	
Temp Badge 🖉 🗙	

Setting up a Temp Badge works just like setting up the regular Badge.

	200		top Level	Change Current L		peroser	Click to logout
	DÐ		Dashboard	Locatio	ons	Tools	Tool States
]			Employees	Groups	History	Reports	Settings
John     ×       Name     -       Smith, John J.		mith, John J. 2345ABC s Membe		ו			
		John J 12345 jjsmith@cont 5551239876	Carrier AT			Badge Info — Badge 🗸 Temp Badge 🗸 Photo —	×
	Language	Device Defa	Create Login			Ø×	
Show Deleted Items							

After a successful Badge scan, the  $\checkmark$  button will change to a  $\checkmark$ . Now, an expiration schedule will display. Set the date and time in which the Badge will stop working. In this case, you want to set it for the end of March 2022.

∫Badge Info —	
Badge 🗸	×
Temp Badge	×
3/31/2022 15	12 : 00 AM ~

With the added Badge, you can now click on the save button to save the changes.

#### L5 Connect<sup>™</sup> Administration Guide

STOFT	ヨル	Top Level	Change Current Loco		rUser	Click to logout
		Dashboard	Locations		Tools	Tool States
		Employees	Groups	History	Reports	Settings
Smith, John J.	Smith, John J 12345ABC		X			
	Info Profiles Membe	erships Subscriptions				
	Last Name Smith			[ Bi	adge Info	
	First Name John				Badge 🗸 🗙	
	M. Initial			Te	emp Badge 🗸 🗙	
	Title			[ [		
	Customer ID 12345ABC				3/31/2022	12 : 00 AM ~
	Email jjsmith@con		-			
	Cell Phone 5551239876	Carrier AT	<b>21</b> ×	[PI	hoto ———	
,	Home Location R&D Lab	2				
	Language Device Defa	ault		~		
[	Admin Login	Create Login				×
Show Deleted Items						

#### Removing a Badge

To remove or clear a badge from an Employee or Admin, go to their user properties and click the  $\times$  button next to the Badge you want to clear.

#### Adding a Photo

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.

To add a photo to the user, you will need to access that user's Employee Properties. Once on that screen, click on the  $\checkmark$  button in the Photo box on the right side of the screen.

Photo	
_	

NOTE: It is recommended to use a square image (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. Select this file you want to use as your picture and click open.

Organize • New folder     * Quick access   • This PC   • JD Objects   • Desktop   • Documents   • Downloads   • Music   • Pictures   • Videos   • Local Disk (C:)   • GAMES (D:)	Date 3/16/2022 2:33 PM 3/16/2022 2:33 PM	Type JPG File JPG File	Image: Size   Size   28 KB   77 KB
Name         Image: Pictures         Image: Pictures         Image: Pictures         Image: Videos         Image: Local Disk (C:)	3/16/2022 2:33 PM	JPG File	28 KB
<ul> <li>pic1.jpg</li> <li>pic2.jpg</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>			
<ul> <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>	3/16/2022 2:33 PM	JPG File	77 КВ
<ul> <li>Desktop</li> <li>Documents</li> <li>Downloads</li> <li>Music</li> <li>Pictures</li> <li>Videos</li> <li>Local Disk (C:)</li> </ul>			
<ul> <li>Documents</li> <li>Downloads</li> <li>Music</li> <li>Pictures</li> <li>Videos</li> <li>Local Disk (C:)</li> </ul>			
<ul> <li>Downloads</li> <li>Music</li> <li>Pictures</li> <li>Videos</li> <li>Local Disk (C:)</li> </ul>			
<ul> <li>Music</li> <li>Pictures</li> <li>Videos</li> <li>Local Disk (C:)</li> </ul>			
<ul> <li>Pictures</li> <li>Videos</li> <li>Local Disk (C:)</li> </ul>			
Videos Local Disk (C:)			
Local Disk (C:)			
GAMES (D:)			
- (			>
File name: pic1.jpg		~ All Pict	ure Files(*.jpg, *.png, *.gi ∨ pen Cancel

You will now see the picture on the Profile. Click SAVE to commit these changes.

ADEL	ÐĨ	Top Level	Change Current Lo		erUser	Click to logout
		Dashboard	Location	is	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Smith, John J.	Smith, Ju 12345AB					<b>N</b>
	Last Name Smith First Name John	embersnips Subscriptions	•	ſ	adge Info —	
	M. Initial				Badge 🗸	× I
	Title			т	emp Badge	×
	Customer ID 12345A	ABC .			3/31/2022	12 : 00 AM ~
	Email jjsmith	@contoso.com		Ľ		
	Cell Phone 555123	9876 Carrier A	T&T ~	ſP	hoto ——	
· · · · · ·	Home Location R&D La	ab 🖉			= /	
	Language Device	Default		~	17-	=V
ſ	Admin Login —	Create Login				
Show Deleted Items					Ø	×

You will notice the generic picture changes to the new one you just added when you save.

STOFT	DETR	Top Level	Change Current Loc	cation Supe	rUser	Click to logout
		Dashboard	Location	is 1	Fools	Tool States
1		Employees	Groups	History	Reports	Settings
Q John X Name Smith, John J.	Smith, Joh 12345ABC	n J. 1berships Subscriptions	n			
	Last Name Smith	iberships Subscriptions		e Ba	adge Info ——	
	First Name John				-	- I
	M. Initial				Badge 🗸 🗙	J
	Title			Те	mp Badge 🗸 🗙	
	Customer ID 12345AB0	2		3	/31/2022	12 : 00 AM ~
	Email jjsmith@c			[L		
	Cell Phone 55512398		&T ~	P	noto ———	
	Home Location R&D Lab					
	Language Device D	efault		~		
	Admin Login ——					
		Create Login				
Show Deleted Items					Ø	×

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

STOFT	ロヨフト	Top Level	Change Current Lo		erUser	Click to logout
		Dashboard	Location	ns	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Smith, John J.	Smith, John 12345ABC	J. erships Subscriptions	)			
ľ	Last Name Smith		-	٢B	adge Info ——	
	First Name John				Badge 🗸 🗙	n
	M. Initial					.
	Title			Te	emp Badge 🗸 🗙	]
	Customer ID 12345ABC				3/31/2022 🔢	12 : 00 AM ~
	Email jjsmith@co	ntoso.com				
	Cell Phone 5551239876	6 Carrier AT	&T ~	٢P	hoto ———	
	Home Location R&D Lab	1				
	Language Device Det	fault		~	9	-
	Admin Login ——	Contralingia			5-	
Show Deleted Items	L	Create Login				×

Remember, the employee picture will display when this user logs into the system on any client or device.

#### Setting an Employee as Admin

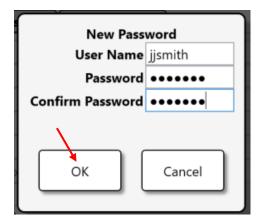
One person can do not everything. For example, suppose you need to delegate administrative responsibilities to others. In that case, you can promote a standard account when you need more Admins.

NOTE: Promoting a standard account to an admin account only creates the administrative username and password that the employee will use to access the Admin Client. It does not give that user the ability to make any changes to the system. You will still need to set the permissions for that user at the location in which they will be managing. Please see the Profiles section of this guide for more information.

You will need to be on the Employee Properties page to create the admin credentials. Then, from the Admin Login section, click on **Create Login**.

GOF	DETR	Top Level	Change Current Loca	tion Super	User	Click to logout
		Dashboard	Locations	T	ools	Tool States
-		Employees	Groups	History	Reports	Settings
Q John X Name - Smith, John J.	Smith, John . 12345ABC	I. erships Subscriptions	1		2	
	Last Name Smith			c Ba	dge Info ——	
	First Name John				Badge	a
	M. Initial J					2 1
	Title			Te	mp Badge 🗸 🗙	
	Customer ID 12345ABC			3	/31/2022 🛅	12 : 00 AM ~
	Email jjsmith@cor	ntoso.com				
	Cell Phone 5551239876	Carrier AT	8xT ⊻	[ Ph	noto ———	
	Home Location R&D Lab	1	1			
	Language Device Def	ault		*		
	Admin Login ——		-↓			
		Create Login				
Show Deleted Items					Ø	×

You will create a username and password. The username **MUST BE UNIQUE**, and the password **MUST BE AT LEAST 6 CHARACTERS**. Once you have entered that information, click **OK**, then **SAVE** the changes by clicking the Blue save icon in the upper right of the screen.



NOTE: The password that is set here is temporary and the user will need to change it on first login. You will now see the admin username of the Employee listed on the page. You can view this section and tell if an employee is an admin.

Anti	ER	Top Level	Change Current Lo		perUser	Click to logout
		Dashboard	Locatio	ns	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Smith, John J.	Smith, John J. 12345ABC		h			
	Last Name Smith	subscriptions	_		Badge Info ——	
	First Name John				Badge 🗸 🗙	n
	M. Initial J				Temp Badge 🗸 🗙	{
	Title					J
	Customer ID 12345ABC				3/31/2022 15	12 : 00 AM ~
	Email jjsmith@cont			l		]
	Cell Phone 5551239876	Carrier AT	&T ~	ſ	Photo ———	]
н	lome Location R&D Lab	2				
	Language Device Defa	ult		*		
ſ	Admin Login ———					
	User Name jjsmith					
Show Deleted Items	Change Password	Clear	Login			<b>.</b>
						<u> </u>

#### Resetting an Admin Password

If you or someone else forgets their password, you can use the **ChangePassword** button to reset it.

#### Removing an Admin

If you want to demote an **Admin** back to a **Standard** account, click on the **Clear Login** button.

Admin Login ———						
User Name jjsmith						
Change Password	d Clear Login					
		_				
	I					

NOTE: When the password is reset, it is temporary, and the user will need to change it on next login.

## 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 clears all permissions and badges assigned to that Employee. However, all other information remains. Therefore, if you want to give access back to 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. Click **Yes** to continue with the deletion.

Anton	Top Level	Cho	ange Current Locati		SuperUser	Click to logout	
	Lo Da:	shboard	Locations		Tools	Tool States	
	Empl	oyees	Groups	History	Reports	Settings	
	nith, John J. 1345ABC Memberships S	ubscriptions					
Last Name	Smith				∩ Badge Info —		
First Name	lohn				Badge		
M. Initial	1				1 78	<u> </u>	
Title					Temp Badge	×	
Customer ID	12345ABC				3/31/2022 15	12 : 00 AM ~	
Email	jsmith@contoso.com						
Cell Phone	5551239876	Carrier AT&T ~			Photo		
Home Location	R&D Lab 🖉						
Language	Device Default			~			
Admin Logir							
Show Delited Items	me jjsmith rd	Clear Login	Are	you su	re you want	to delete Smith, J	lohn J. ?
			e D	_	Yes	No	

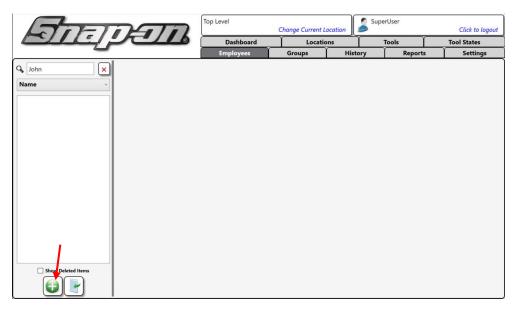
You have deleted the Employee.

Stapen	Top Level	Change Current Loca	tion SuperU				
	Dashboard	Locations	То	ols	Tool States		
3	Employees	Groups	History	Reports	Settings		
John X Name V	Linployees	Groups	misory	repuis	Jacongs		

## 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 level or any sublevels below.



Once checked, select the desired employee account. You will not be able to make any changes to this account until restored. Click on the **RESTORE** button to restore the account.



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 restore.

#### Importing Employees

If you have many users, adding them in 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 following is the format of the .xlsx file used for import. One row for each user:

	1	I	1	1	1		1
Badge	Customer ID	E-mail	First Name	Last Name	M. Initial	Title	Username
Badge # of the user	Unique ID (if needed)	E-mail address of a user	First Name of the user	Last Name of the user	Middle initial of user	Title of user	username of user (If Admin)

Once you have your file ready, click on the import users button at the bottom left of the Employees tab.

जितनगृन	10	Top Level	Change Current Lo		erUser	Click to logout		
		Dashboard	Locatio	ins	Tools	Tool States		
2		Employees	Groups	History	Reports	Settings		
Q John X Name Smith, John J.	Smith, John J 12345ABC	J. erships Subscriptions	)					
	me Smith			٢	adge Info —			
First Na	ime John				Badge	×		
M. In	itial J				Temp Badge / ×			
, , , , , , , , , , , , , , , , , , ,	itle					<u>^</u>		
Custome	r ID 12345ABC				3/31/2022 15 12 : 00 AM ~			
Er	mail jjsmith@con	ntoso.com				]		
Cell Ph	one 5551239876	Carrier AT	ът ×	٢F	hoto ——			
Home Locat	tion R&D Lab	2						
Langu	age Device Def	ault		~				
Change Pa	r Name jjsmith	Clear I	ogin					
Show Deleted items		citari	~ 3		l			

Browse to the location of the file. Once you have it selected, click Open.

← → · ↑ 🖡 > Th	is PC » Local Disk (C:) » New folder	<b>ن</b> ک	Search New folder
Organize • New fold	er		📰 🔹 🔟 🚺
Quick access	Name	Date modified	Type Size
<ul> <li>This PC</li> <li>3D Objects</li> <li>Desktop</li> <li>Downloads</li> <li>Music</li> <li>Pictures</li> <li>Videos</li> <li>Local Disk (C:)</li> <li>GAMES (D:)</li> </ul>	True-Site Employere Import Template.vlsx	3/16/2022 3:59 PM	Microsoft Excel Work
	¢		, · · · · · · · · · · · · · · · · · · ·
File na	me: True-Site Employere Import Template.xlsx		les xlsx) (*.xlsx) V pen Cancel

Once open, the import dialog will display. Use the pull-downs to match the data in the columns with the Employee attribute 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)											
S	Badge		Customer ID	Email	First Name	Last Name	M. Initial	Title	Username	Column8	Column9	Column10
Na	~		~	×	~	~	~	~	~	~	~	×
			Customer ID	Email	First Name	Last Name	M. Initial	Title	Username			
Badge	e	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)			
	mer ID											>
Email												
First N												
Last N												
M. Ini	tial											
Title												
User I	Name											
	_	_						_		_	_	
	Show	Deleted It	tems									

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. You only need to assign them profiles as needed.

			Top Le	evel	Channa Cu		SuperUse	er		Clink to 1
Select Header Row (Double-Click) Identify Column (Drop-Down Menu)										
Badge	Customer ID	Email	First Name	Last Name	M. Initial	Title	Username	Column8	Column9	Colum
Badge ~	Customer ID ×	Email ~	First Name ~	Last Name 🗡	M. Initial ×	Title ~	User Name ~	~	~	
Badge	Customer ID	Email	First Name	Last Name	M. Initial	Title	Username			
Badge # of 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)			

## 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 email 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>, please see the Network Settings section of this guide.

#### Configure 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 (;)

#### Configure Text Messaging

Text Messaging is configured on a per-employee basis and defined in the Employee Properties Subscreen. First, input the number, including area code and without dashes (ex.5555555555), and select the carrier to which the number belongs. Remember that currently, texting only works for **US phone numbers.** 

STOFT	つきつる	Top Level	Change Current Loco	ation	perUser	Click to logout
		Dashboard	Locations	;	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Smith, John J.       SuperUser	Smith, John 12345ABC	J. erships Subscriptions	1			
	Last Name Smith First Name John M. Initial J Title Customer ID 12345ABC Email jismith@co Cell Phone 555123987 Home Location R&D Lab Language Device Def Admin Login User Name jismith	ntoso.com	&T ×		Badge Info Badge 🖉 🗙 Temp Badge 🖉 🗙 Photo	
Show Deleted Items	Change Password	Clear I	Login			

# Groups

## Introduction to 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.

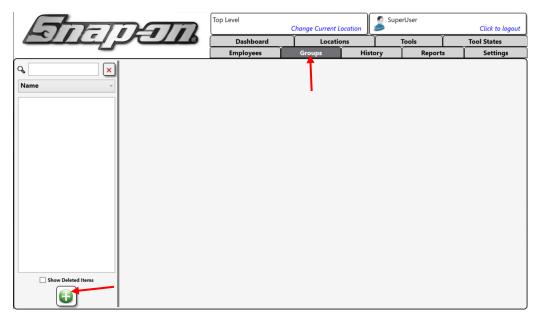
You should set permissions to groups and then assign users to those groups, as setting permissions on Employees can become challenging to manage if you have many users.

## 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.

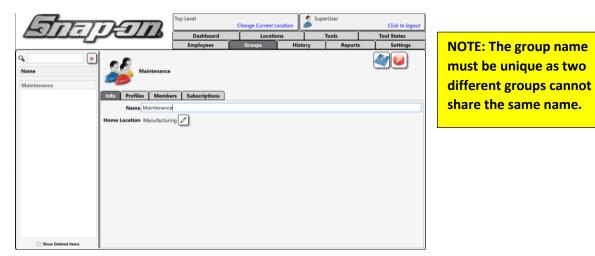
For this example, you need to create a group for the Maintenance Team within the Maintenance Location.

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 **New Group** + button. This will open the Group settings window.

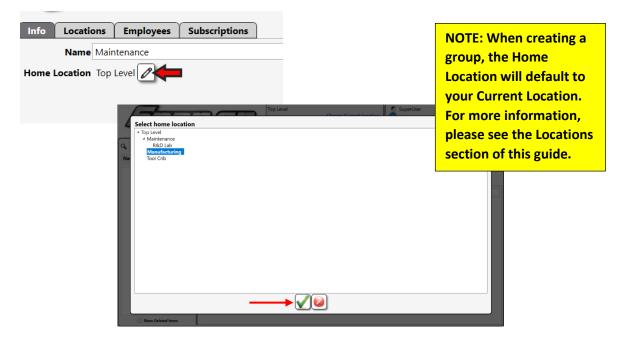


In the Name textbox, enter the desired name of the group.

For this example, you will be creating a group for our Maintenance team so that you will name it **Maintenance**.



Next, set the Home Location by clicking on the 🥕 button 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.



Click the SAVE button to finish creating the group. You will see the group listed on the Group List on the left side of the screen.

Name Maintenance Info Profiles Members Sta	vel Change Current Dashboard Locati mployees Groups ubscriptions		Click to logout Tool States orts Settings			
Name Maintenance			Top Level	hange Current Location	SuperUser	Click to logout
	POLE,	Jell.	Dashboard	Locations	Tools	Tool States
	2		Employees	Groups Hi	story Reports	Settings
Shew Deleted Homs	A Kane	Maintenance Info Profiles Memb Name Maintenanc Home Location Manufactur	ers Subscriptions			

## 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 a	ind cancel icons wil	l not appear until ye	<mark>ou make a change to t</mark>	he group.
--	------------------	----------------------	-----------------------	------------------------------------	-----------

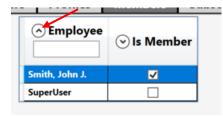
## Adding /Removing Employees to a Group

Select the Members sub-tab on the Group Screen to add an Employee(s) to a 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, then click on the SAVE button to save our changes.

## L5 CONNECT<sup>™</sup> ADMINISTRATION GUIDE

ADET	DETR	Top Level	Change Current Location	SuperUser	Click to logout
		Dashboard	Locations	Tools	Tool States
		Employees	Groups H	story Reports	Settings
Name       Maintenance	Maintenance Montenance Mainte	rs Subscriptions lember			
Show Deleted Items					

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



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 FILTER** button on the left side of Employee Name.

₹	Semployee	Is Member
<b>`</b>	Smith, John J.	✓

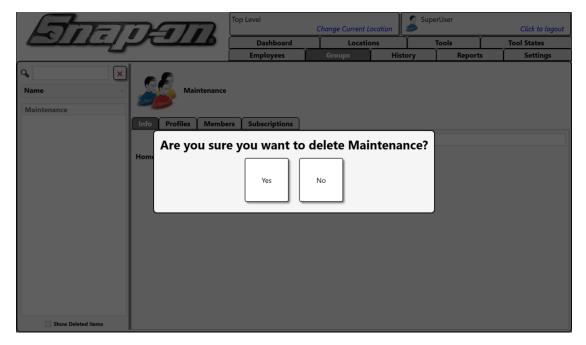
To remove an **Employee** from the **group**, uncheck the **Is Member** checkbox by their name.

## Deleting a Group

You can remove that group from the system when a group is no longer needed. 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 icon at the bottom of the list.

STOFT	DETR	Top Level	Change Current Loca	ntion	erUser	Click to logout
		Dashboard	Locations		Tools	Tool States
		Employees	Groups	History	Reports	Settings
Name       Maintenance	Maintenance	rs Subscriptions				
	Name Maintenance					
	Home Location Manufacturin	ng 🖉				
Show Deleted Iter						

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

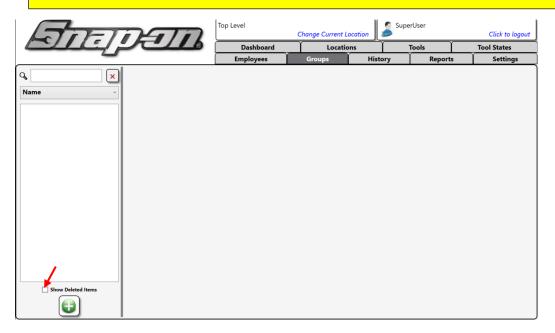


The group has now been deleted.

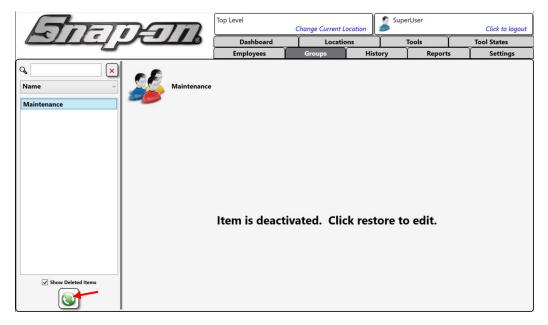
#### Restoring a Deleted Group

When you delete a **Group**, it is not removed from the system; instead, it is deactivated if you want to restore it later. To restore the group, you must check the box **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.



Select the group you want to restore, click on the green restore button, and uncheck the **Show Deleted Items** checkbox to see the active groups list.



The group has been restored, and you should now see it back on the active group list.

## L5 Connect<sup>™</sup> Administration Guide

Stapen	Top Level	Change Current Location	SuperUser	Click to logout
	Dashboard	Locations	Tools	Tool States
	Employees	Groups His	tory Reports	Settings
Name Maintenance Show Deleted Items	Employees	Groups	ttory κeports	Settings
Ð				

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.

# Profiles

## Overview

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

NOTE: For a full list of permissions and descriptions, please see the Permissions Chart in the Appendix.

## **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 administrating 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 us to make a new Profile, as none of the built-in ones will fulfill this need.

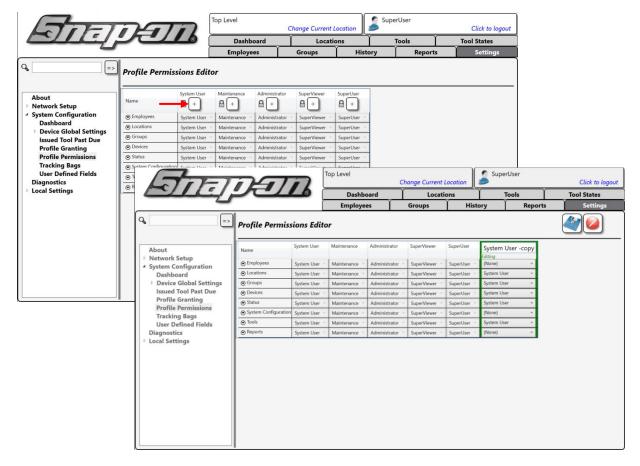
## Creating the Custom Profile

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™ Admin Client**. Once there, on the left side of the screen, expand **System Configuration**, then select **Profile Permissions**.

जितना	ATI	Top L	evel	change Current Location			uperUser	Click to logou
			Dashboard	<u> </u>	Locations	<u> </u>	Tools	Tool States
			Employees	Gro	ups	History	Reports	Settings
=	Profile Permiss	ions Edit	or					1
About ▷ Network Setup	Name	System User	Maintenance	Administrator	SuperViewer	SuperUser		
System Configuration		System User	Maintenance	Administrator ~	SuperViewer ~	SuperUser 🕤		
Dashboard Device Global Settings		System User	Maintenance 🕤	Administrator ~	SuperViewer ~	SuperUser 👻		
Issued Tool Past Due		System User	Maintenance ~	Administrator ~	SuperViewer ~	SuperUser 👻		
Profile Granting	Devices	System User	Maintenance ~	Administrator ~	SuperViewer ~	SuperUser 👻		
Profile Permissions		System User	Maintenance 😪	Administrator ~	SuperViewer ~	SuperUser 👻		
Tracking Bags User Defined Fields	<ul> <li>System Configuration</li> </ul>	System User	Maintenance ~	Administrator ~	SuperViewer ~	SuperUser 👻		
Diagnostics		System User	Maintenance ~	Administrator ~	SuperViewer ~	SuperUser 👻		
Local Settings		System User	Maintenance ~	Administrator ~	SuperViewer ~	SuperUser 👻		

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 our 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.



Let's rename the Profile to Power User. Then you will click on the Blue save icon.

n		Top Level	C	hange Current	Location	ዾ Super	User	Click to logout
		Dashb	oard	Locat	ions	ר	ools	Tool States
		Employe	es (	Groups	Hist	tory	Reports	Settings
Profile Permiss	sions Edito	or					_	→🥙 🥝
Name	System User	Maintenance	Administrator	SuperViewer	SuperUser	Power U	ser	
<ul> <li>Employees</li> </ul>	System User 👋	Maintenance ~	Administrator ~	SuperViewer V	SuperUser ~	(None)	~	
<ul> <li>Locations</li> </ul>	System User 👋	Maintenance ~	Administrator ~	SuperViewer	SuperUser ~	System Use	r v	
Groups	System User 👋	Maintenance ~	Administrator	SuperViewer	SuperUser ~	System Use	r v	
Devices	System User 👋	Maintenance ~	Administrator	SuperViewer	SuperUser ~	System Use	r v	
	System User 🛛	Maintenance ~	Administrator	SuperViewer	SuperUser ~	System Use	r v	
<u> </u>	System User 👋	Maintenance ~	Administrator	SuperViewer ~	SuperUser ~	(None)	v	
	System User 👋	Maintenance ~	Administrator	SuperViewer ~	SuperUser ~	System Use	r v	
	System User 🛛	Maintenance ~	Administrator ~	SuperViewer V	SuperUser ~	(None)	~	
	Profile Permiss Name © Employees © Locations © Groups © Srotus © System Configuration © Tools	Profile Permissions Editor	Employe           Profile Permissions Editor           Name         System User         Maintenance           © Employees         System User         Maintenance           © Locations         System User         Maintenance           © Groups         System User         Maintenance           © Dockics         System User         Maintenance           © Status         System User         Maintenance           © System Configuration         System User         Maintenance           © System Configuration         System User         Maintenance           © Tools         System User         Maintenance	Dashboard           Dashboard           Employees           Profile Permissions Editor           Mane         System User         Maintenance         Administrator           © Employees         System User         Maintenance         Administrator           © Groups         System User         Maintenance         Administrator           © Groups         System User         Maintenance         Administrator           © Devices         System User         Maintenance         Administrator           © Shatus         System User         Maintenance         Administrator           © System Configuration         System User         Maintenance         Administrator           © System Configuration         System User         Maintenance         Administrator           © Tools         System User         Maintenance         Administrator	Change Current           Dashboard         Locat           Dashboard         Locat           Employees         Groups           Profile Permissions Editor         Maintenance         Administrator         SuperViewer           © Employees         System User         Maintenance         Administrator         SuperViewer           © Incations         System User         Maintenance         Administrator         SuperViewer           © Groups         System User         Maintenance         Administrator         SuperViewer           © Brokces         System User         Maintenance         Administrator         SuperViewer           © Shatus         System User         Maintenance         Administrator         SuperViewer           © System Configuration         System User         Maintenance         Administrator         SuperViewer           © System Configuration         System User         Maintenance         Administrator         SuperViewer           © Tools         System User         Maintenance         Administrator         SuperViewer	Change Current Location           Dashboard         Locations           Employees         Groups         His           Profile Permissions Editor         Maintenance         Administrator         SuperViewer         SuperViewer </td <td>Change Current Location           Dashboard         Locations         T           Employees         Groups         History           Profile Permissions Editor         Maintenance         Administrator         SuperViewer         SuperViewer         SuperViewer         Groups         Power Ur           © Employees         System User         Maintenance         Administrator         SuperViewer         SuperV</td> <td>Change Current Location           Dashboard         Locations         Tools           Employees         Groups         History         Reports           Profile Permissions Editor         Maintenance         Administrator         SuperViewer         SuperViewer         SuperViewer         SuperViser         Power User           © Employees         System User         Maintenance         Administrator         SuperViewer         SuperViewer         SuperViser         System User         Isonates         SuperViewer         SuperViewer         SuperViser         System User         Maintenance         Administrator         SuperViewer         SuperViser         System User         System User         SuperViser         System User         System User         SuperViser         System User         System Use</td>	Change Current Location           Dashboard         Locations         T           Employees         Groups         History           Profile Permissions Editor         Maintenance         Administrator         SuperViewer         SuperViewer         SuperViewer         Groups         Power Ur           © Employees         System User         Maintenance         Administrator         SuperViewer         SuperV	Change Current Location           Dashboard         Locations         Tools           Employees         Groups         History         Reports           Profile Permissions Editor         Maintenance         Administrator         SuperViewer         SuperViewer         SuperViewer         SuperViser         Power User           © Employees         System User         Maintenance         Administrator         SuperViewer         SuperViewer         SuperViser         System User         Isonates         SuperViewer         SuperViewer         SuperViser         System User         Maintenance         Administrator         SuperViewer         SuperViser         System User         System User         SuperViser         System User         System User         SuperViser         System User         System Use

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.
ок

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.

STEL			Dashboa	ard	Locatio	ns	Tools	<u> </u>	Tool States
			Employees	5 T	Groups	History	~	Reports	Settings
=>	Profile Permiss	ions Editor		-					
About Network Setup	Name	Power User	System User	Maintenance	Administrator	SuperViewer	SuperUser		
System Configuration	<ul> <li>Employees</li> </ul>	(None)	System User V	Maintenance ~	Administrator ~	SuperViewer ~	SuperUser ~		
Dashboard Device Global Settings	<ul> <li>Locations</li> </ul>	System User	System User V	Maintenance ~	Administrator	SuperViewer ~	SuperUser ~	1	
Issued Tool Past Due		System User	System User V	Maintenance ~	Administrator	SuperViewer V	SuperUser ~	1	
Profile Granting	Devices	System User	System User V	Maintenance ~	Administrator	SuperViewer ~	SuperUser ~		
<b>Profile Permissions</b>	<ul> <li>Status</li> </ul>	System User 🛛 🗸	System User V	Maintenance ~	Administrator	SuperViewer	SuperUser ~		
Tracking Bags	System Configuration	(None)	System User V	Maintenance ~	Administrator	SuperViewer V	SuperUser ~		
User Defined Fields Diagnostics		System User	System User V	Maintenance ~	Administrator	SuperViewer	SuperUser ~		
ocal Settings		(None)	System User V	Maintenance ~	Administrator	SuperViewer	SuperUser ~		

Click on the 🥕 icon for **Power User**, and enter edit mode.

STEPER.			Dashboa	rd	Locations		Tools		Tool States
			Employees		Groups	History		Reports	Settings
=>	Profile Permiss	ions Editor							
About	Name	Power User	System User	Maintenance	Administrator	SuperViewer	SuperUser		
Network Setup System Configuration	<ul> <li>Employees</li> </ul>	(None) ~	System User 🕑	Maintenance ~	Administrator ~	SuperViewer V	SuperUser 😪		
Dashboard		System User 🛛 🗸	System User \vee	Maintenance ~	Administrator ~	SuperViewer V	SuperUser	*	
<ul> <li>Device Global Settings</li> <li>Issued Tool Past Due</li> <li>Profile Granting</li> <li>Profile Permissions</li> <li>Tracking Bags</li> </ul>		System User 🛛 🗸	System User 👋	Maintenance ~	Administrator ~	SuperViewer	SuperUser	× -	
	<ul> <li>Devices</li> </ul>	System User 🛛 👻	System User 👋	Maintenance ~	Administrator ~	SuperViewer V	SuperUser		
	Status	System User 🛛 👻	System User \vee	Maintenance ~	Administrator ~	SuperViewer V	SuperUser	×	
	System Configuration	(None) ~	System User 🗠	Maintenance ~	Administrator ~	SuperViewer V	SuperUser	<ul> <li></li></ul>	
User Defined Fields		System User v	System User 👋	Maintenance ~	Administrator ~	SuperViewer V	SuperUser	-	
Diagnostics Local Settings	<ul> <li>Reports</li> </ul>	(None) ~	System User 🕑	Maintenance V	Administrator	SuperViewer V	SuperUser	× .	

When in edit mode, you can only change the currently selected Profile. Let's give this user the ability to add employees and update their badges. You do not want them granting admin access, nor do you want them giving out Temp Badges. All other permissions should be the same as **System User**.

JIE,			Dashboard	Change Current Location			Tools	Click to log
		Employees		Groups		History	Reports	Settings
=>	Profile Permission	ns Editor						
About	Name	Power User	System User	Maintenance	Administrator	SuperViewer	SuperUser	
Network Setup		Editing	1					•
System Configuration	<ul> <li>Employees</li> </ul>	(Custom) v	System User 🕑	Maintenance ~	Administrator ~	SuperViewer ~	SuperUser ~	
Dashboard	Add/Remove	✓			1		1	
Device Global Settings	Admin Client Access Edit				1		$\checkmark$	
Issued Tool Past Due	Badge Edit	$\checkmark$			1		$\checkmark$	
Profile Granting Profile Permissions Tracking Bags User Defined Fields Diagnostics E Local Settings	Contact Info Edit	✓			1		~	
	Contact Info View	✓			1	$\checkmark$	$\checkmark$	
	Info Edit	$\checkmark$			1		$\checkmark$	
	Info View	$\checkmark$			~	~	$\checkmark$	
	Photo Edit	<b>v</b>			~		$\checkmark$	
	Temp Badge Edit				~		$\checkmark$	
		System User 🗸 👻	System User 👋	Maintenance ~	Administrator ~	SuperViewer ~	SuperUser 🐣	
	Groups     Groups     Groups     Second Se	System User 🗸 🗸	System User 🖂	Maintenance ~	Administrator ~	SuperViewer ~	SuperUser \vee	
	⊙ Status Sys	System User v	System User 🖂	Maintenance ~	Administrator ~	SuperViewer ~	SuperUser ~	
		System User v	System User 🗵	Maintenance V	Administrator ~	SuperViewer V	SuperUser ~	
		(None) v	System User V	Maintenance ~	Administrator ~	SuperViewer ~	SuperUser ~	
	⊙ Tools	System User v	System User V	Maintenance V	Administrator ~	SuperViewer V	SuperUser ~	
		(None) ~	System User 🗸	Maintenance ~	Administrator ~	SuperViewer V	SuperUser ~	

So, the new permissions should look like this. Click the Blue **save** icon to commit the changes.

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



## **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**.

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

STOFT	ロヨフル	Top Level	Change Current Locatio	on SuperUser	Click to logout
		Dashboard	Locations	Tools	Tool States
		Employees	Groups	History F	Reports Settings
About	Profile Granting Edito		SuperViewer SuperUser		1
<ul> <li>Network Setup</li> <li>System Configuration Dashboard</li> <li>Device Global Settings Issued Tool Past Due</li> <li>Profile Granting</li> <li>Profile Permissions Tracking Bags</li> <li>User Defined Fields</li> <li>Diagnostics</li> <li>Local Settings</li> </ul>	Power User  SuperViewer SuperViewer SuperViewer SuperViewer SuperViewer SuperViser Super				

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  $\checkmark$  icon, you will enter edit mode for that Profile. All other profiles will be locked until you save your changes.

Click the edit button for **Super User** and check the box so it can grant the **Power User** profile, then Save.

<u>Ingon</u>			Top Level Change Current Loc					erUser	Click to logout
		8	Dash	board		Locations		Tools	Tool States
			Employ	ees 🏻	Grou	ps	History	Reports	Settings
About Network Setup System Configuration Dashboard Device Global Settings Issued Tool Past Due Profile Granting Profile Permissions Tracking Bags User Defined Fields	Profile Granting E This profile Power User Can grant V Power User System User Maintenance Administrator SuperViewer SuperUser		Maintenance		SuperViewer	SuperUser Editing	History	Reports	Settings
Diagnostics ▷ Local Settings									

As you can see, the **Super User** profile can now grant the **Power User** profile. So go ahead and edit **Administrator** also to grant the Profile. When you are done, your screen should look similar to this:

ATT	ロヨフル	Top Level	Change Current Locatio	on SuperUser	Click to logout
		Dashboard	Locations	Tools	Tool States
		Employees	Groups	History Report	s Settings
About Network Setup System Configuration Dashboard Device Global Settings Issued Tool Past Due Profile Granting Profile Permissions Tracking Bags User Defined Fields Diagnostics Local Settings	Profile Granting Editor		SuperViewer SuperUser		

Now, the Super User or Administrator Profile should be able to assign the **Power User** profile to Employees and Groups.

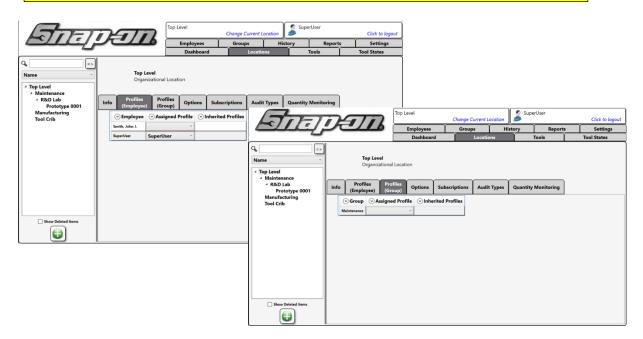
# **Assigning Profiles**

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 a user 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.

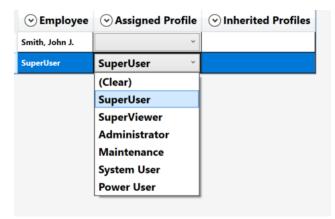
# Location Tab Method

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.

NOTE: You will only see Locations, Employees, and Groups that you have permissions to.



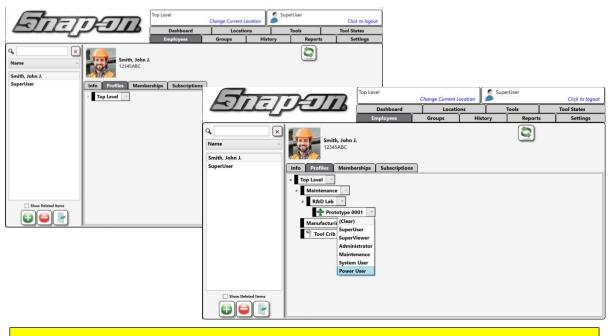
Simply use the pull-down to select which Profile you want to assign to a particular Employee or Group, depending on which sub-tab you are on. Once selected, click the SAVE button in the top right of the screen.



#### **Employee Method**

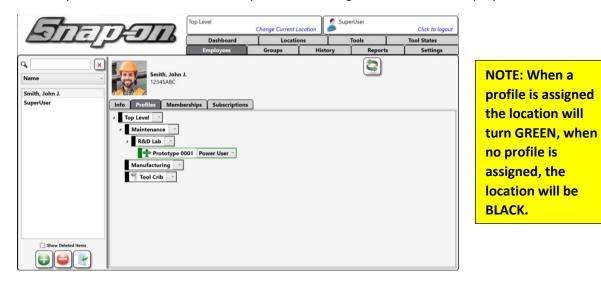
The second method to assign profiles is the **Employee Method**. In this method, you will use the **Profiles** sub-tab on the **Employees Tab**.

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.

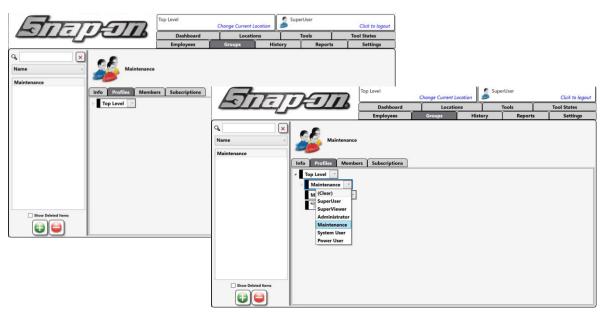
Use the pull-down to select the Profile you want to assign. Then save the Employee.



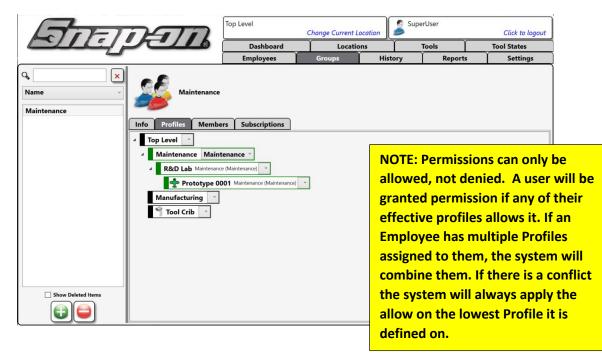
#### Group Method

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.

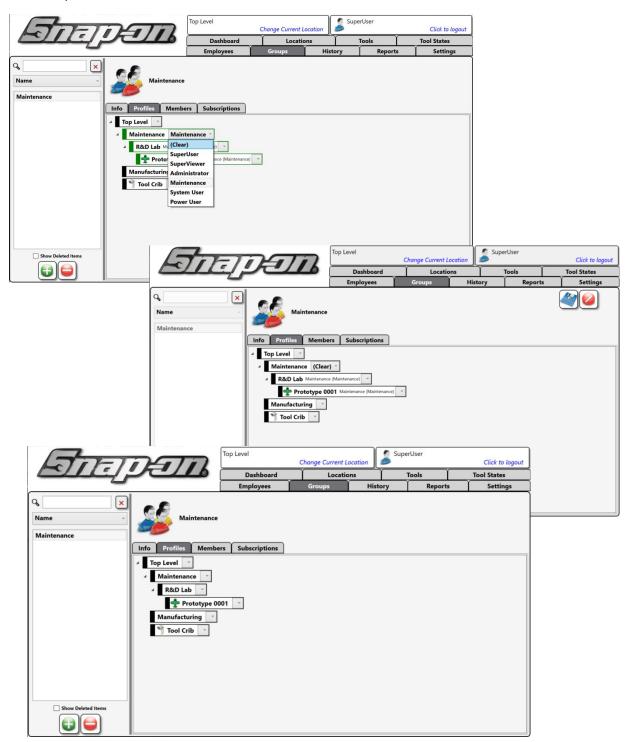


Now use the pull-down to select the Profile you want to assign. Then save the Group. As you can see, when you set a **Profile** to a location with sub-locations, the same **Profile** is applied to the parent's **Child Locations**.



# 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.



# Subscriptions

#### Overview

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: Subscriptions require a status to be applied to a tool or device before a message is sent. For more information, please see the Status Types section of this guide.

Also, you will need to have configured the SMTP settings on the service and have an active connection to the chosen STMP server. For more information, see the Network Settings section of this guide.

# Create a Subscription

Like Profiles, there are three methods you can use to create a subscription: **Employees**, **Groups**, and **Locations**. When you create a subscription from the Employee or group screen, you will be prompted to select a location that the Subscription will monitor. Any events that cause status to be applied in this Location and its sub-locations generate a message based on the subscription settings.

#### **Employee Method**

Creating a subscription requires you to access the Subscriptions sub-tab on the Employee information screen. Once on the Subscriptions tab, click on the + icon to create a new subscription. You need to select a location that the Subscription will monitor. Click the  $\checkmark$  button to continue.

A X Name Smith, John J. SuperUser	Smith, John 12345ABC Info Profiles Memb		Change Current Lo Locatio Groups	cation 🥬	Tools Reports	Click to logout Tool States Settings		
		NOTE: Email Server i ② Employee ③ Grou			⊙ Email Events Text		SuperUser	
Shee Debend Rem	Scheduled Reports -	NOTE: Em	Top Level Top Level RAD Lab RAD Lab Manufacturing Tool Crib			op Level	SuperJser	

After selecting a location for the Subscription to monitor, you will be presented with the **Subscription Configuration Dialog**.

ource Location	DestinationEmployee	Email All Statuses	Email Alerts	Email Events	Text All Statuses	Text Alerts	Text Events
laintenance	Smith, John J.			Not Received			Not Received
				Replacement Requested			Replacement Requested
				Lost			Lost
				Out For Maintenance			Out For Maintenance
				Calibration Requested			Calibration Requested
				Repair Requested			Repair Requested
				Inspection Requested			Inspection Requested
				Not Available			Not Available
				Maintenance Overdue			Maintenance Overdue
				Maintenance Pending			Maintenance Pending
				Wrong Tool			Wrong Tool
				Out for Replace or Repair			Out for Replace or Repair
				Not Issued			Not Issued
				Not Returned			Not Returned
				Issued Past Due			Issued Past Due
				Needs Confirmed			Needs Confirmed
				Offline			Offline
				Bad Drawer State			Bad Drawer State
				Hardware Error			Hardware Error
				Unlocked With Key			Unlocked With Key
				Low Battery			Low Battery
				Critical Battery			Critical Battery
				Device Lockdown			Device Lockdown
				Access Timeout			Access Timeout
				Quantity Low			Quantity Low
				Kit Mismatch			Kit Mismatch

In this dialog, you have three options for both delivery methods (E-mail and Text).

The three methods are:

E-mail/Text All Statuses – You will receive an e-mail or text whenever a status is flagged on a tool.

**E-mail/Text Alerts** – You will receive an e-mail or text whenever a status is flagged on a tool, and the behavior of the status is set to **ALERT**.

Custom Selection – You can define which status types you will be messaged on when they are flagged.

In this example, you want to receive alerts to both our e-mail and phone so that you will check the appropriate boxes.

ſ	Source Location	DestinationEmployee	Email All Statuses	Email Alerts	Email Events	Text All Statuses	Text Alerts	Text Events		
L	Maintenance	Smith, John J.		✓	Not Received		$\checkmark$	Not Received	^	
Į.					Replacement Requested			Replacement Requested		

Then click the SAVE button at the bottom of the screen. You will get a confirmation dialog; click OK.



Succ	essfully added a notification
-	ОК

Now you should see the new **Subscription** in the Notifications section of the screen.

To modify a **Subscription**, you must double-click the Subscription to open the edit window or select it and click the plus button. Clicking the plus button will prompt you that a notification already exists for this user/location combination and ask if you want to edit it. Then you can click on the checkboxes to edit the Subscription.

# Group Method

The group method is identical to the Employee method, except you access the Subscriptions Tab on the Group Information screen. Anytime you add a subscription to a group, all group members will receive the messages.

	DETR	Dashboard	Location	is	Tools	Tool States
-		Employees	Groups	History	Reports	Settings
tenance	X Maintenance	Subscriptions NOTE: Email Server is © Employee ① Group				All Statuses Text A
	Scheduled Reports -					

NOTE: When you create a Subscription on an Employee who is a member of a Group, the group does NOT also get that Subscription. If you want all members of a group to receive the message, you must create the Subscription on the Group.

## Location Method

The location method is like the Employee, and Group methods, except it, adds an extra step when creating a **Subscription**. On the Locations tab, select the location you want the **Subscription** to monitor.



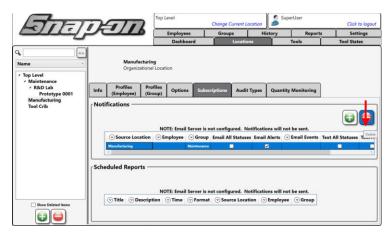
In the Subscriptions tab on the Location Object information screen, click on the + to create a new **Subscription**. You will be presented with a dialog to select if you want the Subscription to apply to an **Employee** or **Group**.

Select the Group Option, use the pull-down to select the Maintenance group, then click the **Save** button. You will then be presented with the **Subscription Configuration Dialog** like usual. Set the **Subscription** to **E-mail Alerts** only, then SAVE the **Subscription**.



# Delete a Subscription

When a Subscription is no longer needed, you can delete it. Go to the Subscriptions Tab of either an Employee, Group, or Location. Select the Subscription you want to delete, then click the DELETE button.



You will get a confirmation box stating that the Subscription has been deleted. Click Ok to finish.



The Subscription will no longer be listed.

जितन		Ti	7 [™	p Level		Change C	Current Location		erUser		Click to logout	t
			8	Employe	es	Group	s	History	Repor	ts	Settings	
				Dashbo	oard		Locations		Tools	ו	fool States	
Name		<b>Manufa</b> Organiza	<b>cturing</b> ational Lo	cation								
✓ R&D Lab Prototype 0001	Info	Profiles (Employee)	Profile (Group	Ontion	s Subso	riptions	Audit Type:	s Quantity	Monitoring			
Manufacturing Tool Crib	[	© Source Loca	ation ©	NOTE: Email Employee NOTE: Email	⊙ Group	Email Al	ured. Notifica Statuses Em ured. Notifica	ail Alerts 🕑	Email Events	Text All 5	Statuses Text A	
Show Deleted Items			escription	() Time	• Format	Sour	ce Location	C Employee	Group			

# Tools

# Overview

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 of the 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.

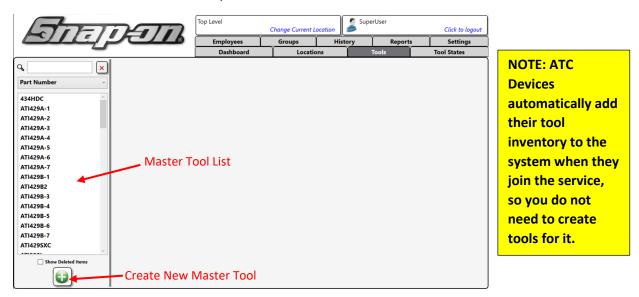
**Customer ID** – a unique alphanumeric number set by the user to ID the tool instance **Serial Number** – the serial number of the physical tool the Instance is being created for **Tag** – if the Barcode for the **Instance** is different from the **Master**, it will be defined here **Home Location** – The zone on the location tree where this Instance will reside primarily

# Adding Tools

So, if you want to add some tools to your True-Crib<sup>™</sup> or RFID Locker, this is relatively easy.

#### Durable

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.



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

ADET	ロモフト	Top Level	Change Current L	ocation	erUser	Click to logout
		Employees	Groups	History	Reports	Settings
		Dashboard	Locatio	ons	Tools	Tool States
Q X	0.					
Part Number						
Part Number v						
434HDC						
ATI429A-1	Info Maintenance					
ATI429A-2						
ATI429A-3	Part Number			[ <sup>1</sup>	Photo ———	
AT1429A-4	Description					
ATI429A-5	Issue Behavior Durable			~		
ATI429A-6	Units 🖉 🗙					
AT1429A-7						
ATI429B-1	Tag 🖉 🗙 🗄	B				
ATI429B2						
ATI429B-3	✓ Verifications ————			l		
ATI429B-4						
ATI429B-5	Issued 🖉 🗙					
ATI429B-6	Return 🖉 🗙					
ATI429B-7						
ATI429SXC						
ATI590L	∫ Optical Toolbox ——					
CTECH4R600A	Default Tolerance	×				
Show Deleted Items		_				

NOTE: For importing a tool list into True-Crib<sup>™</sup> see the True-Crib<sup>™</sup> Users Guide. You want to add a tool with the following properties :

Part Number of NT001 Description of New Tool 001 Issue Behavior Durable It will not have a Unit, Tag, or Photo.

Click the save button to add the Master.

STOFT	DAD	Top Level	Change Current Lo		erUser	Click to logout
	ロシコ	Employees	Groups	History	Reports	Settings
		Dashboard	Location	ıs	Tools	Tool States
Part Number	2					
ATI429A-1	Info Maintenance					
ATI429A-2	Part Number NT001			- P	hoto —	_
ATI429A-3	Description New Tool 001	1		['	1010	
ATI429A-4						
ATI429A-5 ATI429A-6	Issue Behavior Durable					
AT1429A-6 AT1429A-7	Units 🖉 🗙					
ATI429A-7 ATI429B-1		_				
AT1429B-1 AT1429B2	Tag 🖉 🗙 🕻	B				
AT1429B-3						
ATI429B-3	Verifications ———				0 ×	
ATI429B-5	Issued 🖉 🗙					
AT1429B-6						
ATI429B-7	Return 🧷 🗙					
ATI4295XC						
ATI590L	∫ Optical Toolbox ——					
CTECH4R600A						
DB160C	Default Tolerance	×				
Show Deleted Items	L					

# It will now show in the list of Master Tools

ADET	DETT	Top Level	Change Current L		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 Moni	toring		
LDH762 MMM07513 MMM07515 MMM07516 NT001	Part Number NT001 Description New Tool 001 Issue Behavior Durable				Photo ———	
NY2001 NY2012 NY2014 NY27000MDKIT	Units 🖉 🗙 Tag 🧷 🗶					
NY27000MDK11 NY27004VB NY27004VB NY27004MG NY2700AD NY27025H50	Verifications Issued Return Optical Toolbox					J
Show Deleted Items	Default Tolerance	×				

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 📦 button to create a new Instance.

FITT	ロヨフト	Top Level	Change Current L		perUser	Click to logout
		Employees	Groups	History	Reports	Settings
		Dashboard	Locatio	ons	Tools	Tool States
Part Number     LDH702     LDH752     LDH762	NT001 New Tool 001	tenance Contained Ir	Quantity Moni	toring		
MMM07513 MMM07515 MMM07516 NT001	<ul> <li>○ Hume Location ○ S</li> </ul>	erial Number 📀 Custo	mer ID Qty 🕑 Iss	ued 🕑 Work Loo	ation 🕞 Kit	
NYZ001 NYZ012 NYZ014						
NYZ7000MDKIT NYZ7000S NYZ7004VB NYZ7006MG						
NY27006MG NY2700AD NY27025H50						
Show Deleted Items						

Select the Tool Crib as the Location this Instance will be created and stored, then click the  $\checkmark$  button to continue.



The system will then ask you how many instances you want to create. You want to make 3. Click the  $\checkmark$  button to continue.

3	Maintenance	Contained In	Quantity Monitoring
		# Instance	s
ion		3	. ⊡ ⊙ we

#### WARNING!

When creating instances of Consumables & Returnable Consumables only create 1 instance. The quantity of the consumables are defined in the properties of the instance.

The instances will then be displayed in the instance tab of the Master Tool.

जान	í	-	)	Top Leve	I		Chan	ge Cu	rrent Locatio		SuperUse	r		Click to logout
				Em	ploye	ees	Gr	oups		Histor	ry 🗍	Reports		Settings
1				[	Dashb	oard	$\gamma$	L	ocations	Ĩ	Tool	s		Tool States
Part Number		NT001 New Tool		tenance	Cor	ntained In	Qua	antity	Monitoring					
LDH762							-	,						
MMM07513	E	Show Deleted Iter	ms											
MMM07515			0			0			<u> </u>					
MMM07516			(v) \$	Serial Nur	nber	<ul> <li>Custo</li> </ul>	mer ID	Qty	(v) Issued		ork Location	i ⊙Kit		
NT001		Tool Crib						1					X	
NYZ001	H	Tool Crib			-			1					-	
NYZ012		Tool Crib						1				+ +		
NYZ014		I												
NYZ7000MDKIT														
NYZ7000S														
NYZ7004VB														
NYZ7006MG														
NYZ700AD														
NYZ7025H50														
Show Deleted Items														

Suppose you need to identify each tool separately due to different maintenance schedules or other reasons. In that case, 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.

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 a 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 a tool was replaced. You will be shown the Instance information screen.

Top Level	Click to losout
Editing NT001	
Par Par ID New Tool 001 Top Level/Tool Crib	
LD Info Issued Status	
LD Customer ID	
Mi Serial Number (Tool)	
Tag 🖉 🗶 🖨	
NT Color ID Tag 🖉 🗙	
Home Location Tool Crib	
ToolID 100272	
NY Default Part # / Desc. NT001 / New Tool 001	
NY	
NY	
NY	
NY NY	
NM	
РВ	
Show Deleted Items	

You can define the Instance with the following information

## Customer ID – NT001a Serial Number – NT001a

You can click on the SAVE button to save the changes to the Instance, then click the CLOSE button.

		Top Level	SuperUser
	Editing NT001		
<b>%</b>	NT001		
Par	SAVE New Tool 001 Top Level/Tool Crib		CLOSE
LD LD	Info Issued Status		
LD	Customer ID NT001a		
M	Serial Number (Tool) NT001a		
	Tag 🖉 🔀 🖨		
NT	Color ID Tag 🖉 🗙		
NY	Home Location Tool Crib 🖉		
NY	ToolID 100272 Default Part # / Desc. NT001 / New Tool 001		
NY	Default Part # / Desc. N1001 / New 1001 001		
NY			
PB			
Intà	Show Deleted Items		,

The updated instance information will then be displayed in the instance list.

ADET	DETA	Top Level	Ch	ange Curren	nt Location	Super	User	Click to logout
		Employ	ees	Groups	Т	listory	Reports	Settings
		Dash	board	Loca	ations	T T	ools	Tool States
Part Number	NT001 New Tool		ntained In 0	Quantity Mc	nitoring	)		
LDH762			ntained in C	luantity Mc	onitoring			
MMM07513	Show Deleted Iter	ms						
MMM07515		-						7
MMM07516	Home Location	Serial Number	<ul> <li>Customer</li> </ul>	ID Qty 🕑	) Issued (	<ul> <li>Work Locat</li> </ul>	tion 🕑 Kit	
NT001	Tool Crib	NT001a	NT001a	1			X	ו
NYZ001	Tool Crib			1				4
NYZ012	Tool Crib			1				1
NYZ014								_
NYZ7000MDKIT								
NYZ7000S								
NYZ7004VB								
NYZ7006MG								
NYZ700AD								
NYZ7025H50								
Show Deleted Items								

Go ahead and fill out the information for the remaining two instances using b and c.

STOFT	DETT	Top Level	Chan	ge Current Locati	on Super	User	Click to logout
		Employ	ees Gr	oups	History	Reports	Settings
		Dashl	ooard	Locations	T	<b>Tools</b>	Tool States
Part Number	NT001 New Tool		ntained In Qua	ntity Monitorin	g		
LDH762 MMM07513 MMM07515 MMM07516	Show Deleted Iter	ns 🕑 Serial Number	⊙ Customer ID	Qty ⊙Issued	⊙ Work Loca	tion 🕑 Kit	
NT001	Tool Crib	NT001a	NT001a	1		X	
NYZ001	Tool Crib	NT001b	NT001b	1			
NYZ012	Tool Crib	NT001c	NT001c	1			
NYZ014 NYZ7000MDKIT NYZ7004VB NYZ7006MG NYZ700AD NYZ7025H50							

You have now created a **Master Tool** and **Instances** of that tool that can be issued out for use in True-Crib<sup>™</sup>.

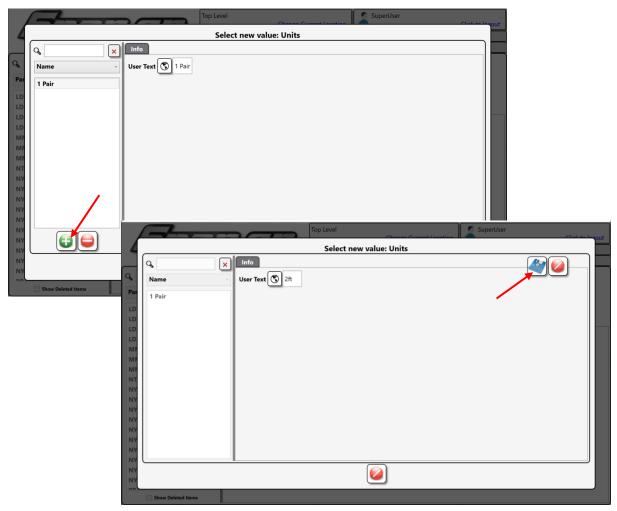
# Consumables & Returnable Consumables

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 an amount of the tool. So, if you have 50 of a consumable tool, you will make one **Instance** and set its **Quantity** to 50.

Like before, the first step is to create a Master tool for the 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.

To create a unit, click the *P* 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.



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

# L5 Connect<sup>™</sup> Administration Guide

			Top Level	SuperUser
			Select new value: Units	
		Info		]
<b>%</b>	Name v	Jser Text 🕥 2ft		
Par	1 Pair			
LD	2ft			
LD				
LD LD				
M				
M				
NY				
	Show Deleted Items			

The Unit will now be assigned to the Master Tool.

		Top Level		🖉 Sup	erUser	
	つちつる		Change Current Locat	ion 🥬		Click to logout
		Employees	Groups	History	Reports	Settings
2		Dashboard	Locations	Ĩ	Tools	Tool States
Q. X	CON001					
Part Number 🗸	Consumable T	ool 001				
LDH682	3					
LDH702		γ	Ύ			
LDH722	Info Instances Main	tenance Contained In	Quantity Monitorin	ng		
LDH762	Part Number CON001			ſ	hoto ———	ר ר
MMM07513	Description Consumable	Tool 001				
MMM07515	Issue Behavior Consumabl	e		~		
MMM07516		<u>,</u>				
NT001	Units 2ft 🖉 🗙	J				
NYZ001		<u>_</u>				
NYZ012	Tag 🖉 🗙 🤅					
NYZ014	✓ Verifications ———					
NYZ7000MDKIT						
NYZ7000S	Issued 🖉 🗙					-
NYZ7004VB						
NYZ7006MG	Return 🖉 🗙					
NYZ700AD	·					
NYZ7025H50						
NYZ7026EH						
Show Deleted Items						

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

# L5 CONNECT<sup>™</sup> ADMINISTRATION GUIDE

STOFT	DETR	Top Level	Change Current L		erUser	Click to logout
		Employees	Groups	History	Reports	Settings
		Dashboard	Locatio	ons	Tools	Tool States
Part Number	CON001 Consumable	Tool 001				
LDH702	Info Instances Mai	ntenance 🎽 Contained I	n 🎽 Quantity Moni	itoring		
LDH722 LDH762						
MMM07513						
MMM07515	Home Location	Serial Number 😔 Cust	omer ID Qty 😔 Is	ssued 😔 Work Loca	ation 🕞 Kit	
MMM07516	Tool Crib		1		X	
NT001					L L	
NYZ001						
NYZ012						
NYZ014						
NYZ7000MDKIT						
NYZ7000S						
NYZ7004VB						
NYZ7006MG						
NYZ700AD						
Show Deleted Items						

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

		Top Level	Change Current Location	SuperUser	Click to	-		
	Editing CON001				$\overline{\mathbf{e}}$			
<b>Q</b> Par	CON001 Consumable Tool 001 Top Level/Tool Crib							
	Info Issued Status Quantity 5d 2ft + - Customer ID							
	Serial Number (Tool) Tag 🖉 🗶 🖨 Color ID Tag 🖉 🗙							
NY	Home Location Tool Crib	STITEL	n An	Top Level	Change Current Loca		iperUser	Click to logout
NY	Default Part # / Desc. CON001 / Consumable Tool 001			Employees	Groups	History	Reports	Settings
NY				Dashboard	Locations		Tools	Tool States
NY NY NY NY		Part Number    LDH682    LDH702	CON001 Consumable	Tool 001	Quantity Monitor	ing		
nn	Show Deleted Items	LDH722 LDH762 MMM07513 MMM07515	Show Deleted Items	Serial Number 📀 Custo	mer ID Qty 🕑 Issue	ed 💿 Work L	ocation ⓒ Kit	
		MMM07516 NT001	Tool Crib		50		×	
		NYZ001						
		NYZ012						
		NYZ014 NYZ7000MDKIT						
		NYZ7000S						
		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.

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.

		Top Level	Change Current L	ocation	erUser	Click to logout
	DEN	Employees	Groups	History	Reports	Settings
		Dashboard	Locatio	ons	Tools	Tool States
Part Number 434HDC ATI429A-1	Info Maintenance					
ATI429A-2 ATI429A-3 ATI429A-4 ATI429A-5	Part Number Kit001 Description Standard Too Issue Behavior Kit	l Kit		F	Photo ———	]
ATI429A-6 ATI429A-7 ATI429B-1 ATI429B2	Units 🖉 🗙 Tag 🖉 🗙 (	5				
ATI429B-3 ATI429B-4 ATI429B-5 ATI429B-6	Verifications					
AT14298-6 AT14298-7 AT14295XC AT1590L	Return 🖉 🗙					
CON001						

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.

FIFT	つきつる	Top Level	Change Current	Location	SuperUser	Click to logout
		Employees	Groups	History	Reports	Settings
		Dashboard	Locati	ions	Tools	Tool States
Part Number ATI4298-4 ATI4298-5 ATI4298-5 ATI4298-6 ATI4298-7 ATI4295XC ATI4295XC ATI590L CON001 CTECH4R600A DB160C GA225 GA3200 GLASS12BKA GLOVE7XLB GLOVE7XLB GLOVE7XLB KIt001		tenance Templa te child events Set sta	Contained In datus on kit mismat			Location

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  $\checkmark$  button to add it.

	op Level	SuperUser		
	Select type for new item		1	
Pr         Part Number         JaHDC         Att23A-1         Att23A-2         Att23A-3         Att23A-3         Att23A-4         Att23A-7         Att23A-7         Att23A-7         Att23A-8         Att23A-7         Att23A-7         Att23B-8         Att23B-8			Select type for new item	SuperUver
NOTE: Just like with Tools, Kit Tools have MASTER and instance the tool you want to the kit is not in the li will need to create a MASTER for that too	a di to di t	LDF762 MMM07513 MMM07513 MMM07515 MMM07516 NYZ011 NYZ012 NYZ012 NYZ012 NYZ005 NYZ70005 NYZ70005 NYZ70005 NYZ70005 NYZ70004BMT Optical Toolbox -		Phote

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  $\checkmark$  button.

	Select: Quantity Minimum Quantity 1	Very Tool 001  Select: Location  Available	
--	--	--	--

You should see the tool listed in the Template.

# L5 Connect<sup>™</sup> Administration Guide

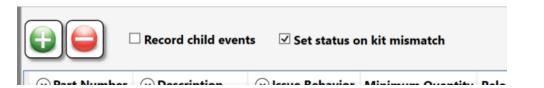
	per		Employees	Groups	History	Reports	Settings
			Dashboard	Location	IS	Tools	Tool States
۷ از							
Part Number	Kitt	001 ndard Tool Kit					
AT1429B-4	3						
AT1429B-5	Info Instances	Maintenanc	e Template (	ontained In Qu	antity Monitori		
AT1429B-6	into instances	waintenanc	e lemplate c	ontained in Qu	antity wonitori	ng	
ATI429B-7							
ATI4295XC		Record child e	vents 🗹 Set stat	us on kit mismatch	61		
ATI590L							
CON001	Part Number	<ul> <li>Description</li> </ul>	✓ Issue Behavior	Minimum Quanti	ty Reload Quan	tity 🕑 Units 😔 Le	ocation
CTECH4R600A	NT001	New Tool 001	Durable	1.00			
DB160C							
GA225							
GA3200							
GLASS12BKA							
GLOVE7LB							
GLOVE7MB							
GLOVE7XLB							
Kit001							
L122							
L32							
1000	<u>×</u>						
Show Deleted Items							

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.

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**.

KITE				Change Current Lo		Ύ		NOTE: When
			ployees	Groups	History	Reports		tates adding a
AT14298-4         AT14298-4           AT14298-5         AT14298-5           AT14298-6         AT14298-7           AT14298-7         AT14295XC           AT14298-7         AT14295XC           CON001         CTECH4R600A           DB160C         GA3220           GLAS5128KA         GLOVE7LB           GLOVE7LB         Kit001           L122         L32	Kitt Star	201 Indard Tool Kit Maintenance Record child even O Description Consumable Tool 001	ts 🗹 Set statu	Location A Locati	antity Monitoria	-	© Location	consumable to a     kit, it will     prompt you for     a Minimum     Quantity like a

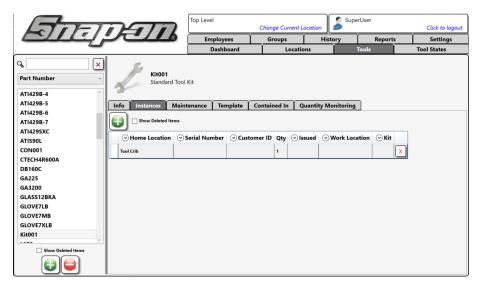
Once created, you have options at the top of the Template tool list.



Record child events – Log events for all children of the kit and the kit itself.

**Set status on kit mismatch** – 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.

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.



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.

1				Top Level	Change C	wort location	SuperUser	Click to lesout
4	Editing K	(it001						
<b>Q</b> Par		<b>Kit001</b> Standard Tool Kit						
AT	3	Top Level/Tool Crib						
AT	Info Issu	ed Status	Kit					
AT AT	Kit Mismatch	Update: Master T	Template Create: 1	Fools				
AT AT			<ul> <li>Details</li> </ul>	<b>⊘</b> Quantity	⊙ Minimum Quantity	⊗ Reload Quantity	<ul> <li>➢ Location</li> </ul>	
со	Ø	CON001	Consumable Tool 001		1	1		
CT	1	CTECH4R600A	600 ft. lb. torque wrench		1			
GA	1	NT001	New Tool 001		1			
GA GL	1	TP-01	TEST PART		1			
GL								
GL								
Kit								
L32								
Lizz	Show Deleted Ite	ems						

You will see a Kit Mismatch section here. You have two options

	Kit Mismatch	Update: Master Template	Create: Tools
Г	·		

**Update:** Master Template – Change the Template on the Master tool based on the Instance.

**Create: Tools** – Create tool instances based on the Master Tool Template.

Click on **Create: Tools, and** you will see the color change from RED (Missing instance) to Grey(Present) and Yellow(Tool with a Status).

				Top Level	Change C		SuperUser	Clink to Issout
4	Editing K	it001						<u> </u>
Q Par	S	<b>Kit001</b> itandard Tool Kit <i>Top Level/Tool Crib</i>						
AT	Info Issue	ed 🚦 Status	Kit					
AT AT								
AT				Quantity	Minimum Quantity		<ul> <li>Location</li> </ul>	
со	×	CON001	Consumable Tool 001	0	1	1		
DB	×	CTECH4R600A	600 ft. lb. torque wrench	1	1			
GA GA	×	NT001	New Tool 001	1	1			
GA	×	TP-01	TEST PART	1	1			
GL								
GL								
Kit L12								
L32								
104	Show Deleted Ite	ms						

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.

	Top Level	SuperUser
	Editing CON001	<b>E</b>
Q. Par	CONSOL Console Tool 001 Top Level/Tool Conte	1
	Info Issued Status Quantity 1	
	Customer ID Serial Number (Tool)	
	Tag 2 × 🖨 Color ID Tag 2 ×	
	Kit Kit001 / Standard Tool Kit	
	Default Part # / Desc. CON001 / Consumable Tool 001	

The status has now been cleared.

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[	Editing I	KitOO1 KitOO1 Standard Tool Kit Top Level/Tool Crib						
	Info Issu	ued Status	Kit					
			⊘ Details	⊙ Quantity	⊙ Minimum Quantity		<ul> <li>➢ Location</li> </ul>	
o	×	CON001	Consumable Tool 001	1	1	1		
B	×	CTECH4R600A	600 ft. lb. torque wrench	1	1			
A	×	NT001	New Tool 001	1	1			
A	×	TP-01	TEST PART	1	1			
L( L( It 12								

#### 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.



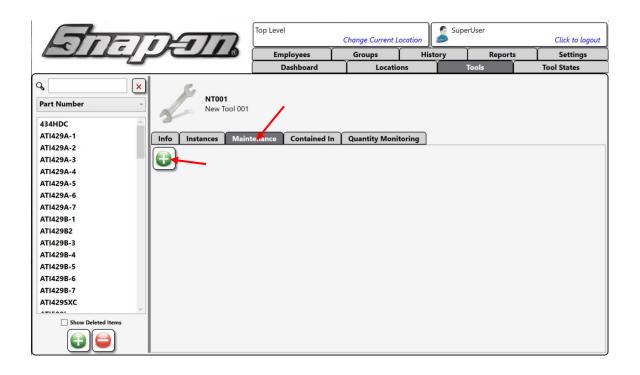
You will need to create a new Kit Master. Then create an instance of that Master. Go to the kit tab within the instance properties and use the IMPORT button. Once imported, you can then click on **Update: Master Template**. That will then push the list of tools to the Tool Master Template.

NOTE: For more information about tool importing please see the True-Crib™ Users Guide.

# **Tool Maintenance**

You may have some tools that need to be maintained or calibrated. Keeping track of this can be cumbersome and tedious. You may also miss some maintenance periods due to a lack of accurate maintenance records. L5 Connect<sup>™</sup> automates most of this. It can track what tools need to be serviced and how long tools have gone without service.

You need to create a **Maintenance Type** and assign it to a Master Tool. To do this, select the **Master Tool NT001** in the Admin Client. A Maintenance Type describes what needs to be done to the tool to keep it in working order. After you have the Master Tool selected, click on the **Maintenance** sub-tab. This page will display all **Maintenance Types** assigned to the Master Tool.



Next, click on the button to assign a **Maintenance Type**. Two types are already added to the system on setup, Calibration & Inspection. If these do not match the type of Maintenance you want to perform, you will need to create a new **Maintenance Type**.

NOTE: Maintenance Types are Global and once created can be used with any master tool in the system.

If you want to assign a Maintenance Type of Cleaning, you must create it.

To create the new **Maintenance Type**, click on the **Maintenance Type** subscreen will appear, and you will need to name the new type. Name this type as **Cleaning**, then click the SAVE button.

		Top Level	SuperUser
		Select type for new item	
<b>%</b>	Name		
Par	Calibration		
434	Inspection		
AT			
Par           43.           43.           AT           AT			
со			
	Show Deleted Items		

		Top Level	SuperUser
		Select type for new item	
		× Info	
8	Name	User Text Cleaning	
Par	Calibration		
434 AT	Inspection		
AT			
AT AT			
AT AT			
AT AT			
AT			
AT AT			
AT			
AT			
AT			
СО		<u> </u>	
	Show Deleted Items		

If you require a **Multiple Language Display**, you can click on the S button to set the name in different languages. Click the check box and input the display text for each language.

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		Top Level	SuperUser	Click to logout
		Select type for new ite	m	our
8	Name	User Text 🖉 Cleaning		
Par	Calibration			
434	Cleaning			
AT	Inspection			
AT				
AT AT				
AT				
AT				
AT AT				
AT				
AT				
AT				
AT AT				
AT				
AT				
AT CO				
	Show Deleted Items			

Now that you have created the new type, you can assign it to the Master Tool.

Click on the  $\checkmark$  button to continue. You are now presented with a maintenance schedule.

ADE	ロヨフト	Top Level	Change Current Lo		perUser	Click to logout
CIE		Employees	Groups	History	Reports	Settings
		Dashboard	Locatio	ns	Tools	Tool States
Q X	R.					
Part Number	NT001 New Tool 001					
434HDC	3					
ATI429A-1	Info Instances Main	tenance Contained In	Quantity Monit	oring		
AT1429A-2		contained in	Quantity monit	Joing		
ATI429A-3						
ATI429A-4						
ATI429A-5		n				
ATI429A-6	Cleaning 🤤					
ATI429A-7	Overde	ue Warning				
ATI429B-1	Days					
AT1429B2	Maintenance Cycles					
AT1429B-3	Issues					
AT1429B-4	Uses					
AT1429B-5						
AT1429B-6						
AT1429B-7						
ATI429SXC						
AT1590L						
CON001						
CTECHARCOOA						
Show Deleted Items						

From here, you can set the plan using several different methods.

Days – Time in days until the tool is due for Maintenance

Maintenance Cycles – How many times a tool can be maintained until it needs major Maintenance. Issues – How many times the tool can be issued for use before it needs to be serviced. Uses – How many times a tool can be used before it is due for service. Set the schedule for 14 Days between services and set it to 30 Maintenance cycles. Also, put a warning period on the tool. 2 Days and 5 Maintenance cycles should be adequate. Once you are done, click the Save button.

ADET	DÐN	Top Level	Change Current Lo		perUser	Click to logout
CIE		Employees	Groups	History	Reports	Settings
4		Dashboard	Locatio	ns	Tools	Tool States
Part Number	NT001 New Tool 001					
434HDC						
ATI429A-1	Info Instances Main	tenance Contained	In Quantity Monit	oring		
ATI429A-2						
TI429A-3						
TI429A-4						
TI429A-5	<b>I</b>					
TI429A-6	Cleaning					
TI429A-7	Overd	ue Warning				
TI429B-1	Days 14	2				
TI429B2	Maintenance Cycles 30	5				
TI429B-3	Issues					
TI429B-4	Uses					
TI429B-5						
T1429B-6						
TI429B-7						
TI429SXC						
T1590L						
ON001						
TECHARCOOA						
Show Deleted Items						

NOTE: The Warning value is # of days/cycles from maintenance date. For example, when this tool gets to within 2 days of the maintenance date, it will be flagged as pending maintenance.

Now that the maintenance plan has been assigned, you will notice Maintenace Overdue statuses applied to all of the instances of that Master Tool. This is because the system doesn't know the last maintenance date and cannot calculate the next maintenance date. You need to set the date of previous Maintenance on the instances. Click on the **Instances** tab.

STOFT	DETR	Top Level	Change	e Curre	ent Location	SuperUser	C	ick to logou
		Employee	s Gro	ups	ŀ	History	Reports :	Settings
)		Dashbo	ard	Lo	cations	Tools	Tool S	States
Part Number	NT001 New Tool 0	101						
ATI429A-1	Info Instances Ma	aintenance Cont	ained In Quan	tity N	lonitoring	)		
AT1429A-2						-		
ATI429A-3	Show Deleted Item:	5						
AT1429A-4		0.000	<u></u>		<u></u>	<u></u>	~ <b>**</b> *	
AT1429A-5	Home Location	Serial Number		Qty	(v) Issued	✓ Work Location		
ATI429A-6	1 Tool Crib	NT001a	NT001a	1				X
ATI429A-7	Tool Crib	NT001b	NT001b	1				
ATI429B-1								
AT1429B2	1 Tool Crib	NT001c	NT001c	1				
AT1429B-3	1 Tool Crib			1			Kit001 / Standard Tool Kit	
ATI429B-4								
AT1429B-5								
ATI429B-6								
ATI429B-7								
ATI429SXC								
· · · · · · · · · · · · · · · · · · ·								
Show Deleted Items								

You can **double-click** on **NT001b** to bring up its properties.

		Top Level	ana anna taonta	SuperUser	Click to lo court
4	Editing NT001				
Par 434	NT001 New Tool 001 Top Level/Tool Crib				
AT	Info Issued 🧜 Status 🛕 Ma	intenance			
AT	Customer ID NT001b				
AT AT	Serial Number (Tool) NT001b				
AT	Tag 🖉 🗙 🖨				
AT	Color ID Tag				
AT	Home Location Tool Crib				
AT	ToolID 100273 Default Part # / Desc. NT001 / New Tool 001				
AT					
СО					
LATE.	Show Deleted Items				

As you can see, there are active alerts on the **Status** and **Maintenance** tabs.

On the Status tab, you can see that the maintenance plan is out of date.

4		Change Current Los	superoser	Click to	legoui
	Editing NT001			<b>e</b>	
Q Par	NT001 New Tool 001				
	Top Level/Tool Crib				
AT	Current	Available			1
43 AT AT AT AT AT	Avaintenance Overdue 4/20/2022 2:12:19 PM ()	Calibration Requested	Inspection Requested	Lost	
AT AT AT AT		Not Available	Not Issued	Not Received	
AT AT AT AT AT		Not Returned	Out For Maintenance	Out for Replace or Repair	
AT AT AT CO		Repair Requested	Replacement Requested	~	
CAT	Show Deleted Items				

If you go over to the Maintenance tab, you can see that the date and time for the plan you just created have not been set. So the system doesn't know when it needs to start the maintenance schedule.

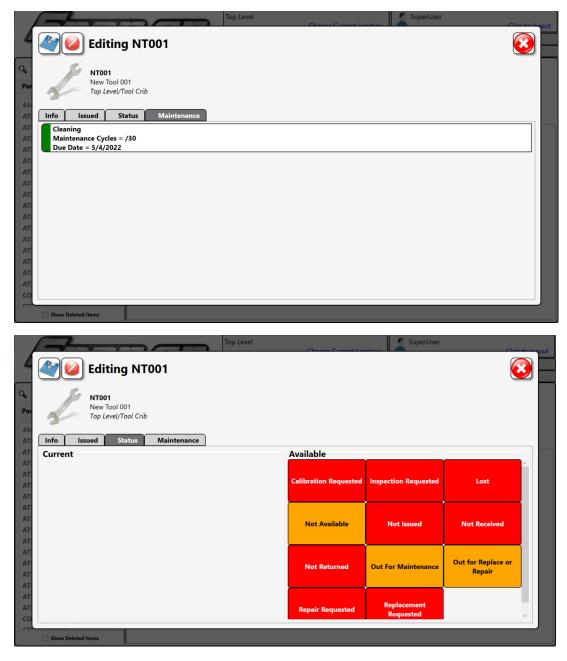
	Top Level SuperUser	legout
	Editing NT001	
<b>Q</b> Par	NT001 New Tool 001	
434 AT	Top Level/Tool Crib	
AT AT	Cleaning Maintenance Cycles = /30	
AT AT AT	Due Date =	
AT AT AT		
AT AT		
AT AT AT		
AT AT CO		
~++	Show Deleted Items	

**Double-Click** on the Maintenance event to bring up its schedule. Select the **Date of Last Maintenance** to today since you just added the plan, and click the  $\checkmark$  button to set it.

	A	Top Level	SuperUser		
4	Editing NT001				
	NTOOT New Tool 001: Top Level/Tool Crib Info Cleaning Cleaning Due Date = 10 10 10 10 10 10 10 10 10 10	Cleaning Days / 14 Maintenance Cycles Due Date Select a date (1) Date of Last Maintenance Select a date (1) (1) (1) (1) (1) (1) (1) (1)			SuperUser
AT		Editing	17001		and the sector of the sector o
18 2 2 3	Due Mint Ren	Per da su	NT001 New Tool 001 Fig. Level/Tool Crib ed Status Maintener e Cycles = /30 5/4/2022 CI Maintenance (	Date 5/4/2022	

The status of the tool instance has gone from Red to Green, and the status has also been cleared.

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Click the SAVE button to close the tool instances' properties.

NOTE: You will need to set the maintenance date for every instance of a tool that you create a plan for. This is because once the maintenance plan has been set, the system doesn't know when the last date of maintenance occurred and cannot calculate the next maintenance date.

# Verifications

A **verification** defines whether you want the user to verify the tool's condition when checking out or returning it back 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.

All **Verifications** are global and can be assigned to any **Master** once created. Let's take the kit example and generate a verification that will ask to **Verify Contents of the Set**.

You want to create this Verification on tool **NT002**, an Allen Wrench Set. Select the tool in the **Master Tools List**, then add this Verification when it is **Issued** and **Returned**. To begin, click on the *P* button.

STOTE!	ロヨフト	Top Level	Change Current L		perUser	Click to logout
		Employees	Groups	History	Reports	Settings
		Dashboard	Locatio	ns	Tools	Tool States
Q     NT     ×       Part Number     ×       NT001       NT002	Alan Wrench S	iet tenance Contained In	Quantity Monit	oring		
Show Deleted Items	Part Number NT002 Description Alan Wrench Issue Behavior Durable Units 🖉 🗶 Tag 🖉 🗶 🕼 Verifications Issued 🖉 🗶 Return 🖉 🗶 Optical Toolbox Default Tolerance 🖉 2				Photo ———	

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 check out this kit. Click on the for button.

			Top Level	Change Current Location	SuperUser	Click to logout
		Select	new value: Verificati	on at Tool Issue		
	Q X					
S	Name ~					
Par	Verification Required					
NT						
NT						
	Show Deleted Items					

You will see the Verification Creation Sub-screen. You can define several properties here:

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 – a photo that will display during Verification

Let's fill out the information on this screen to create the Verification.

		Top Level Channel Connect Level SuperUser
		Select new value: Verification at Tool Issue
Par NT NT	Name Verification Required	Info Assigned Master Tools  Name Verify Contents Description Verify Contents User Text Please Check for Missing Componets.
		Dual User Verify Required
	Show Deleted Items	

If you need to have a second person validate the Verification, check the box by **Dual User Verify Required.** This will require a second person to confirm the Verification.

If you want to have text in multiple languages, press the 🔇 button.

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 🥕 button. You will then be prompted to select your image.

$\leftarrow \rightarrow \checkmark \uparrow$ ] > This	PC > Local Disk (C:) > New fo	lder	ע גע אין	ch New folder
Organize • New folder				· . ?
🚰 Quick access	Name	Date	Туре	Size Tags
<ul> <li>This PC</li> <li>3 D Objects</li> <li>Desktop</li> <li>Documents</li> <li>Downloads</li> <li>Music</li> <li>Pictures</li> <li>Videos</li> </ul>	<ul> <li>2-black-metal-allen-wre</li> <li>pic1.jpg</li> <li>pic2.jpg</li> </ul>	4/20/2022 2:50 PM 3/16/2022 2:33 PM 3/16/2022 2:33 PM	JPG File JPG File JPG File	23 КВ 28 КВ 77 КВ
🐛 Local Disk (C:)	< ₹ 2-black-metal-allen-wrenches	-Sep282021-1.jpg	All Picture     Open	S Files(*.jpg, *.gi ∨ Cancel

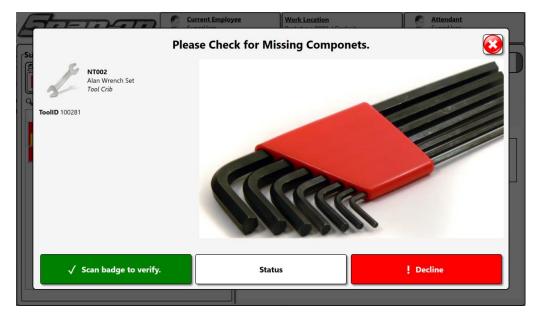
The picture will then show on the verification screen. Click the Save button when you are done. Then click the  $\checkmark$  button to assign the Verification to the Master Tool.

		Top Level	Change Current Leasting	
4		Select new value: Verificat	ion at Tool Issue	
_	۹ ×			
S	Name			
Par	Verification Required			
NT		Info Assigned Master Tools		
NT		Name Verify Contents	Photo —	
		Description Verify Contents User Text S Please Check for M		
		Dual User Verify Required	issing componets.	
		Sound		
			Top Level	SuperUser
	(	4	Select new value: Verification at Tool Issue	
			Verify Contents	
	Show Deleted Items		Verify Contents	
		Par Verification Required		
		NT Verity Contents	Info Assigned Master Tools Name Verify Contents	Photo
			Description Verify Contents	
			User Text S Please Check for Missing Componets.	
			Dual User Verify Required	
			Sound	
		Show Deleted Items		
		Show Deleted Items		

The Verification has now been assigned to the Issued action. Do the same with the return. Since you already created the Verification, you just need to select it from the list on the left and assign it with the  $\checkmark$  button. Then click the SAVE button on the Master Tool.

ATT-I	DETR	Top Level	Change Current L		iuperUser	Click to logout
		Employees	Groups	History	Reports	Settings
		Dashboard	Locatio	ons	Tools	Tool States
Q     NT     X       Part Number     V       NT001     NT002	Alan Wrench S	Set tenance / Contained In	Quantity Moni	toring		<b>M</b>
	Part Number NT002 Description Alan Wrench	Set			Photo —	
	Issue Behavior Durable Units 2X Tag 2X	5				
	Verifications Issued Verify Contents	×				
Show Deleted Items	Optical Toolbox Default Tolerance	×				

Once assigned, the Verifications will run each time this tool is issued or returned. When the tool is issued or returned, the Employee will be prompted with the following screen.



NOTE: When selecting a tool that has verification, you will receive two audio prompts warning you of the verification. Once when you first select the tool and again when you check-out.

# 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

Open the Tools tab and select a Consumable tool, then select the Quantity Monitoring Tab

ADET		1/1		Vy Compa	any	Change Cur	rent Location	Sup Sup	erUser, SUPERUSEF	R Click to logout
			ß	Emp	loyees	Groups	н	listory	Reports	Settings
			Ē	Da	ashboard	L	ocations	Ĩ	Tools	Tool States
9										
Part Number		GLOV								
ATI429SXC	~	XL HD	LATX TEC	H GLVS						
ATI590L										
CTECH4R600A	Info	Instances	Mainter	nance	Kit Quan	tity Monitoring	3			
DB160C										
GA225										
GA3200	⊖ Hom	e Location	Min Qty	Max Qty	Reorder Po	int Reorder Qt	y Units			
GLASS12BKA			•••	.,		-				
GLOVE7LB										
GLOVE7MB										
GLOVE7XLB										
JHWSHSFDB-8										
L122										
L32										
L52B										
L62										
L672B										
L8112A										
Show Deleted Items										

Click the **button** and select the location you want this Monitor to reside. Here you are creating a **Restock Monitor** so that you will choose the Location as the **Tool Crib**.

		My Company		SuperUser, SUPERUSER	
			Change Current Location	8	Click to logout
	Select: Location				
	My Company				^
	<ul> <li>Maintenance</li> </ul>				
S	▲ Hangar 1				
Par	▲ H1 Bay 1				
Far	Plane0001				
ATI	▲ H1 Bay 2				
ATI	Plane0002 Tool Crib				
СТВ	A Hangar 2				
DB	H2 Bay 1				
GA	H2 Bay 2				
GA	Production				
	▲ Area A				
GL/	▲ A Line 1				
GLO	Item Assembly 0001				
GLO	4 A Line 2				
GLO	Item Assembly 0002				
JHN	▲ Area B				
L12	B Line 1				
	B Line 2				
L32	<ul> <li>Finishing Dept</li> </ul>				
L52	Finish Line 01				
L62	Engine Shop				
L67	Brake Shop				
L81	Calibration Lab				
L82					
L87		V V			
L87					
2072	Show Deleted Items				

Click the V to continue. You are now presented with the Monitor Properties dialog.

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 our values like this.

Min Qty	<b>/ly Company/Maintenance/Hangar 1/T</b> 50	1 Pair
Max Qty	250	1 Pair
Reorder Point		1 Pair
Reorder Qty		1 Pair

Click the SAVE button to save the Monitor. Then save the tool.

GOFT		My Company	c	Change Current L	ocation	SuperU	ser, SUPERUSER	Click to logout
	DET	Employees	Ĩ	Groups	Hist	ory	Reports	Settings
		Dashboar	ď	Locatio	ons	То	ols	Tool States
Q								
Part Number	GLOVE7XLB	;						
	XL HD LATX	TECH GLVS						Save
ATI429SXC								
ATI590L CTECH4R600A	Info Instances Mai	ntenance Kit	Quantity I	Monitoring				
DB160C								
GA225								
GA3200				<b>D</b>				
GLASS12BKA		-		Reorder Point	Reorder C	-		
GLOVE7LB	My Company/Maintenance/Hanga	ar 1/Tool Crib 50	250			1 Pair		
GLOVE7MB								
GLOVE7XLB								
JHWSHSFDB-8								
L122								
L32								
L52B								
L62								
L672B								
L8112A								
L82A								
L872 L872H								
L872H Show Deleted Items								

## Creating a Monitor from the Locations Tab

Now that you have a Monitor set for Restocking create another one for Reordering when inventory gets low. You set this at the organization 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.

STOFT	$\overline{\mathcal{A}}$	11	My Com	npany		Change	Current Loo	cation	Super	User, SUPERUSE		lick to l	ogout
			Er	Employees		Groups		Histo	ory	Reports	Settings		5
				Dashboard			Locations			Fools	Tool S	tates	
Name		<b>Mainter</b> Organiza	<b>iance</b> ational Locatio	n									
⊿ Hangar 1 ⊿ H1 Bay 1 Plane0001	Info	Profiles (Employee)	Profiles (Group)	Options	Subscri	ptions	Audit Ty	pes Qu	uantity Mo	onitoring			
⁴ H1 Bay 2 Plane0002 Tool Crib	Image: Control	me Location		✓ Part	Number	💎 Des	cription	Min Otv	Max Otv	Reorder Point	Reorder Otv	Units	
₄ Hangar 2 H2 Bay 1 H2 Bay 2		oany/Maintenance/H	langar 1/Tool Crib	-		-	X TECH GLVS		250.00			1 Pair	×
<ul> <li>Production</li> <li>Area A</li> <li>A Line 1</li> <li>Item Assembly 0</li> <li>A Line 2</li> </ul>													
Item Assembly 0 ₄ Area B B Line 1													
B Line 2													

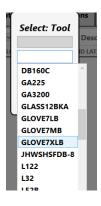
You can see the Monitor you already created because it is a child location to the one you have selected.

You will again click on the 🕞 button; this time, you are asked to select a tool.



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Move your mouse to the White Space and select the Tool GLOVE7XLB.



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.

GLOVE7XLB (N	ly Compar	y/Mainter	nance)
Min Qty			1 Pair
Max Qty			1 Pair
<b>Reorder Point</b>	500		1 Pair
Reorder Qty	2000		1 Pair
	Save		

Then click **SAVE**, and then Save the Location.

-			My Com	My Company Change Current Location					Super	User, SUPERUSE		Click to logout		
		JI.	E	mployees	Ĩ	Grou	ps	Histo	tory Reports		s Settings		;	
				Dashboar	d	)	Locations		Tools		Tool States			
Name     4 My Company     4 Maintenance		<b>Mainten</b> Organiza	aance ational Locatio	'n							Save			
<ul> <li>✓ Hangar 1</li> <li>✓ H1 Bay 1</li> </ul>	Info	Profiles (Employee)	Profiles (Group)	Options	Subscri	iptions	Audit Ty	pes Q	uantity Mo	onitoring				
Plane0001 ▲ H1 Bay 2 Plane0002														
Tool Crib	⊖ Ho	me Location		😔 Part Numb		🕑 Des	cription	Min Qty	Max Qty	Reorder Point	Reorder Qty	Units		
H2 Bay 1	My Com	pany/Maintenance/H	langar 1/Tool Crit	GLOVE7XLB		XL HD LAT	IX TECH GLVS	50.00	250.00			1 Pair	X	
H2 Bay 2 4 Production	My Com	pany/Maintenance		GLOVE7XLB	1	XL HD LAT	X TECH GLVS			500	2000	1 Pair		
Area A     Area A     A Line 1     Item Assembly 0     A Line 2     Item Assembly 0     A Line 2     Item Assembly 0     A Area B     B Line 1     B Line 2     Finishing Dept     Finishing Dept     Finish Line 01     Forgine Shop														

You now have two monitors set to tell you if you need to restock or reorder this specific part when inventory runs too low.

If you want to remove a Monitor, click on the **DELETE BUTTON**.

Site	$\mathcal{F}$	1/1	My Com	ipany		Change	Current Loo	cation	Super	User, SUPERUSE		lick to logout
			) Er	nployees		Groups		Histo	ory	Reports	S	ettings
				Dashboard		Locations		s	Tools		Tool S	itates
Q₀     =>       Name     ✓       4 My Company     ^       4 Maintenance     ✓		<b>Mainten</b> Organiza	a <b>nce</b> Itional Location	n								
▲ Hangar 1 ▲ H1 Bay 1	Info	Profiles (Employee)	Profiles (Group)	Options	Subscri	iptions	Audit Ty	pes Q	uantity Mo	onitoring		
Plane0001 4 H1 Bay 2 Plane0002												
Tool Crib ₄ Hangar 2		me Location			Number	😔 Des	cription	Min Qty	Max Qty	Reorder Point	Reorder Qty	Units
Hangar 2 H2 Bay 1 H2 Bay 2	My Comp	pany/Maintenance		GLOVE7XLB		XL HD LA	TX TECH GLVS			500.00	2000.00	1 Pair 🗙
<ul> <li>✓ Production</li> <li>✓ Area A</li> </ul>	My Comp	pany/Maintenance/H	angar 1/Tool Crib	GLOVE7XLB		XL HD LA	X TECH GLVS	50.00	250.00			1 Pair Dele
A Line 1     Item Assembly 0     A Line 2     Item Assembly 0     A rea B     B Line 1     B Line 2     Show Deleted Items     O												

# Deleting a Tool

Sometimes you no longer have a tool, or one has been retired out of service—no need to keep it in the system, taking up space. You can easily remove the tool by deleting it.

To delete a tool, you must first make sure that all tool instances have been removed. First, select the Instance you want to delete, then click the X button.

ADET	DAT	Top Level	C	hange Cu	rrent Location	🔰 Sup	perUser	Click to	logout
SIE		Emp	loyees	Groups	н	istory	Reports	Setti	ngs
		Da	ashboard	ι	Locations	Ϋ́	Tools	Tool State	s
Q     NT001       Part Number       NT001	NTOC New Info Instances	01 Tool 001 Maintenance	Contained In	Quantity	Monitoring				
	Show Delete	d Items							
	Home Location	Serial Number	Customer ID	Qty 📀	Issued	$\odot$	Work Location	⊙ Kit	
	Tool Crib	NT001a	NT001a	1					×
	Tool Crib	NT001b	NT001b	1					
	Tool Crib	NT001c	NT001c	1					
	Tool Crib			1				Kit001 / Standard Too	Kit
Show Deleted Items	¢								>

Click **Yes** to confirm you want to remove the Instance.

Are you sure you	ı want to	delete t	he selected item?
	Yes	No	

The Instance will then be removed from the list.

ADEL	DAT	Top Level	c	hange Cu	urrent Location	💪 Sup	erUser	Click to lo	gout
SIE		Emp	oloyees	Group	s i Hi	story	Reports	Settings	;
		D	ashboard		Locations		Tools	Tool States	
Part Number	NTO New	01 Tool 001 Maintenance	Contained In	Quantity	y Monitoring				
	Show Delete		contained in	quantity	ymonitoring				
		Serial Number		Qty 🤆	) Issued	$\odot$	Work Location	⊙ Kit	
	Tool Crib	NT001b	NT001b	1					X
	Fool Crib	NT001c	NT001c	1					
	Fool Crib			1				Kit001 / Standard Tool Kit	
Show Deleted Items	¢								

Once all of the instances are removed. You can now click on the button on the lower left side to delete the **Master Tool**.

STOFT	つってい	Top Level	Change Current Lo		perUser	Click to logout
		Employees	Groups	History	Reports	Settings
		Dashboard	Locatio	ns	Tools	Tool States
NT002     ×       Part Number     ×       NT002     ×	NT002 Alan Wrench St					
	Info Instances Maint	enance Contained In	Quantity Monit	oring		
	Show Deleted Items					
	Home Location	⊙ Serial Number ⊙ C	ustomer ID Qty	✓ Issued	✓ Work Location	⊙ Kit
Show Deleted Items						

Are you sure	e you wa	ant to delete	NT002?
	Yes	No	
l			

Click Yes and Master Tool; NT002 will be deleted.

Note: All instances of a tool must be removed before the system will allow you to delete the master of that tool.

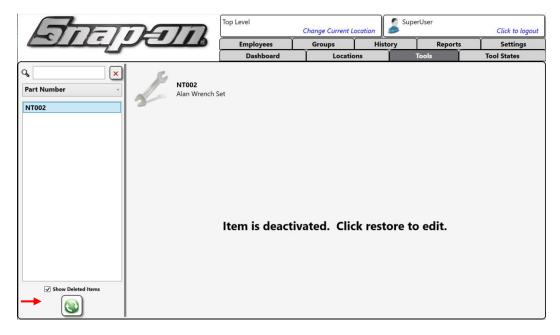
# Restoring a Tool

Suppose you need a Master Tool that you had previously deleted. In that case, you can restore that deleted **Master Tool** from the admin client.

On the Tools Tab, click on the **Show Deleted Items** checkbox on the lower left-hand side of the screen. This will give you a list of all deleted **Master Tools.** 



Select the tool you want to restore, then click the green 💿 button. Uncheck the checkbox to return the list back to normal.



The tool should now be back in the list, and you should be able to add new instances to it.

# L5 CONNECT<sup>™</sup> ADMINISTRATION GUIDE

STOFT	ロヨフト	Top Level	Change Current L		berUser	Click to logout
		Employees	Groups	History	Reports	Settings
		Dashboard	Locatio	ons	Tools	Tool States
Q         ×           Part Number         •           MMM07515         •           MM07516         •           NT001         •           NVZ001         •           NVZ012         •           NYZ014         •           NVZ014         •	NT002 Alan Wrench S Info Instances Maint Show Deleted Items		Quantity Moni	toring	⊙ Work Location	
NYZ7000S NYZ7006MG NYZ7006MG NYZ7025H50 NYZ7025H50 NYZ7025EH PB434HD PT1800AL						

To restore an instance of a tool, select the master tool, then mark the checkbox **Show Deleted Items**. This will list all of the deleted instances. Click the Restore button to restore the Instance back to the system.

ATTEL	つきつひ	Top Level		Chang	e Current Loci		perUser			Elick to logout
		Dashboard	Locations	Tools	Tool States	Employees	Groups	History	Reports	Settings
Part Number  MMM07515  MMM07516 NT001 NT002	Alan Wrench		Contained In	Quantity	Monitoring	]				
NY2001 NY2012 NY2014 NY27000MDKIT	Home Location     Tool Crib	n 🕑 Serial N	umber 🕞 Co	ustomer ID	Qty 🕑 Issu	led	⊙ Work	Location	⊙ Kit	•
NYZ7000S NYZ7004VB NYZ7006MG NYZ700AD										
NYZ7025H50 NYZ7026EH PB434HD										
PT1800AL TK-01 Show Deleted Items										

The Instance will now be available again for an issue.

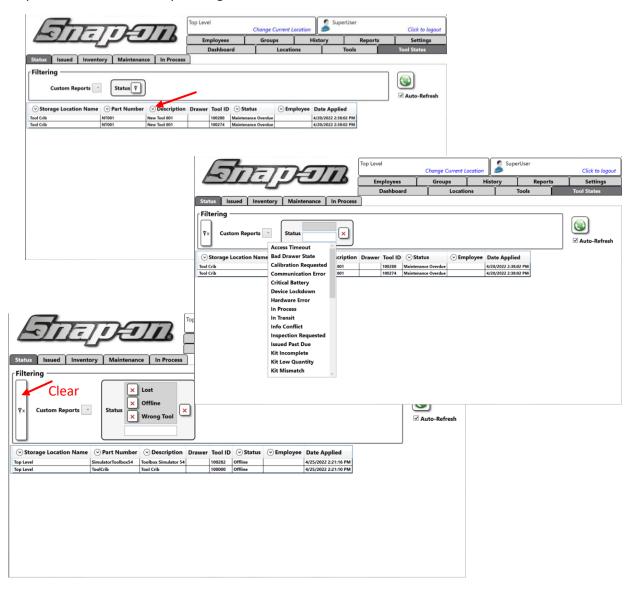
# **Tool States**

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.

In the lists on each tab, you can select multiple rows and then use the Jump List and Forensic features.

# Status Tab

If a status has been applied to any of your tools or L5 Connect<sup>™</sup> Devices, it will display on this screen. You can filter the list by selecting specific statuses. You can choose multiple statuses in the filter. Finally, you can clear the filter by clicking the clear filter button or the X button.



# Issued Tab

This tab shows all currently issued tools.

जित्तार्ग	Top Level	Change Current Lo		perUser	Click to logout
	Employees	Groups	History	Reports	Settings
2	Dashboard	Location	15	Tools	Tool States
Status Issued Inventory Maintenance In	Process				
Filtering					
	Employee 🖤 🛛 Work Location	♥ Sub Locatio	n 🔻 Work O	order (†	<b>∑</b> Auto-Refresh
Storage Location Name	cription Drawer Tool ID Is	sued Time Issu	ed Quantity 📀	Units 🕞 Employe	e 🕞 Work Location
	eep, 3/8", 6-Point 1 100283 4/2	25/2022 2:13:42 PM 1.00		SuperUser	Prototype 0001 C
<					>

You can filter this list based on the following:

Issued Time 😁 🗸 Start	Date Select a date 15	End Date Select a date 15	×
Employee X Smith, John J. SuperUser	Sub Location	×       ×         Work Order	×
Mgd Out of Box			

You can also apply a custom Issued Tools report to this list as a custom filter.

Custom Reports

# Inventory Tab

This tab displays the entire tool inventory of the system. By changing your Current Location, you can filter the view to only display the currently selected location's inventory.

जितन	ma	Top Level		C	hange Current Lo	cation		SuperUser	Click to logout
		Empl	oyees	$\neg$	Groups	Hist	ory	Reports	Settings
4		Da	shboard	<u> </u>	Location	15	<u> </u>	Tools	Tool States
			Jinbourd		Location			10015	loor states
Status Issued Invento	ory Maintenan	ce In Process							
Filtering Custom Reports	Total Quanti	ty♥							✓ Auto-Refresh
⊙ Storage Location Name	⊘ Part Number	<ul> <li>Description</li> </ul>	Drawer	Tool ID	Total Quantity	⊙ Units			
Tool Crib	434HDC	¾" DR SET w/CASE & FOAM		100048	1.00		^		
Tool Crib	434HDC	¾" DR SET w/CASE & FOAM		100085	1.00				
Tool Crib	434HDC	¾" DR SET w/CASE & FOAM		100122	1.00		1		
Tool Crib	434HDC	¾" DR SET w/CASE & FOAM		100159	1.00		1		
Tool Crib	434HDC	¾" DR SET w/CASE & FOAM		100196	1.00		1		
Tool Crib	ATI429A-1	MICROSHAVER SKIRT-5/16		100016	1.00		1		
Tool Crib	ATI429A-1	MICROSHAVER SKIRT-5/16		100018	1.00		1		
Tool Crib	AT1429A-2	MICROSHAVER SKIRT-3/8		100015	1.00		1		
Tool Crib	AT1429A-2	MICROSHAVER SKIRT-3/8		100019	1.00		1		
Tool Crib	AT1429A-3	MICROSHAVER SKIRT-7/16		100014	1.00		1		
Fool Crib	AT1429A-3	MICROSHAVER SKIRT-7/16		100020	1.00		1		
Fool Crib	AT1429A-4	MICROSHAVER SKIRT-1/2		100013	1.00		1		
Tool Crib	AT1429A-4	MICROSHAVER SKIRT-1/2		100021	1.00		1		
Fool Crib	AT1429A-5	MICROSHAVER SKIRT-9/16		100012	1.00				
Tool Crib	AT1429A-5	MICROSHAVER SKIRT-9/16		100022	1.00				
Tool Crib	AT1429A-6	MICROSHAVER SKIRT-5/8		100011	1.00				
Tool Crib	AT1429A-6	MICROSHAVER SKIRT-5/8		100023	1.00				
Tool Crib	AT1429A-7	MICROSHAVER SKIRT-3/4		100010	1.00				
Tool Crib	AT1429A-7	MICROSHAVER SKIRT-3/4		100024	1.00				
Tool Crib	ATI429B-1	MICROSHAVER CUTTER-CARB-5/16		100009	1.00				
Tool Crib	ATI429B-1	MICROSHAVER CUTTER-CARB-5/16		100025	1.00				
Tool Crib	ATIA20R2	MICPOSHAVED CUTTED_CADR.3/8		100008	1.00		$\sim$		

You can also filter the view based on Quantity using the Quantity filter.



You can also apply a custom Tool Inventory report to filter this list further.

Custom Reports

# Maintenance Tab

This tab shows any tool that currently has a Maintenance Type applied to it, the last Maintenance date, and the next due date.

STOF	DE	10	Top Leve	I	Change Curren		uperUser		Click to logou
			Em	ployees	Groups	History	R	eports	Settings
4		Ì	Ī	Dashboa	rd Loca	tions	Tools	i i	ool States
Status Issued Invento			]	<u></u>					<b>()</b>
Custom Reports Storage Location Name	⊖ Maintenanco		Drawer		⊙ Maintenance Type	Last Maintenance	Due Date		Auto-Refrest
ool Crib	NT001	New Tool 001		100273	Cleaning	4/19/2022	5/3/2022	2	14
ool Crib ool Crib	NT001 NT001	New Tool 001 New Tool 001		100274	Cleaning Cleaning			2	14

The following filters can be applied to the list.

Maintenance Typ	Calibration Cleaning Inspection
Due Date	Start Date Select a date 🗊 End Date Select a date 🗊 🗙

Like all the other tabs, you can further filter this list by Location or apply a custom Tool Maintenance Report.



# In Process Tab

This tab is for a future feature that will be fully implemented later.

# History

The History Tab allows you to view all events in the system. Every event that has occurred will be listed here. Again, you can filter the list by a date range.

A	FIA	16	Top Level	Ch	ange Current Location	SuperUser	Click to logout			
	EDE		Dashi	board	Locations	Tools	Tool States			
			Employ	ees	Groups Hist	ory Repo	rts Settings			
🔿 Hide: Archive Im	age					_				
	Drawer Open Image									
	Image not associated with t	he selected	l event	ent Image not associated with the selected event						
	ormal: Top Level	<b>J</b>								
Date	<ul> <li>Action</li> </ul>	<b>⊘</b> Dwr			⊘ Affected Employee	<ul> <li>Source Location</li> </ul>	Destination Location			
4/25/2022 11:55:43 AM	Status Set					Z92LP999	^			
4/25/2022 11:55:43 AM	Box Shutdown					Z92LP999				
4/25/2022 11:55:39 AM	Unauthorized User					Z92LP999				
4/25/2022 11:36:18 AM	Session completed			SuperUser	SuperUser	Z92LP999	Prototype 0001			
4/25/2022 11:29:51 AM	Unauthorized User					Z92LP999				
4/25/2022 11:29:51 AM	Unauthorized User					Z92LP999				
		<					>			

When you click on the filter button, you will be given the filter options dialog.

Normal: T	ilter Settings	
ate	End Dat	te
15	4/25/2022	15
	Normal: T	

Set the Location, **Start Date** & **End Date** for your search, then click the  $\checkmark$  to accept or CANCEL button.

The list will only display the events for the location and date range you set.

You can clear the filter by clicking on the CLEAR FILTER button



NOTE: The history log will only display events for the current location level and sub-levels. If you want to view events for other locations, you will need to change your current location. For more information, please see the Session Bar section of this guide. You can also filter the list using the headers in the table. Click on the **v** button to open the data filter. You can now type in data, and the list will filter based on the text.

Date 4/25/2022 11:55:43 AM	Action Status Set	Date	Action
Date	Action tool		
4/25/2022 11:17:21 AM	Tool Returned		
4/25/2022 11:17:02 AM	Tool Issued		
4/25/2022 11:14:06 AM	Master tool description changed		

An archive image is uploaded to the service for toolbox tool issues and returns and is viewable from the History Tab. You can use this view to verify when a tool was removed and returned to the toolbox.

The images in the viewer can be zoomed in using the mouse wheel and panned using the Left-Mouse button. To reset the view, click on the Right-Mouse button.

You can also download the image using the download buttons.

You can hide the image viewer by clicking on the ^ in the upper left of the screen by **Hide: Archive Images**. You can also grab the line between the images and the grid to resize the panes to show more image and less grid or vice versa.

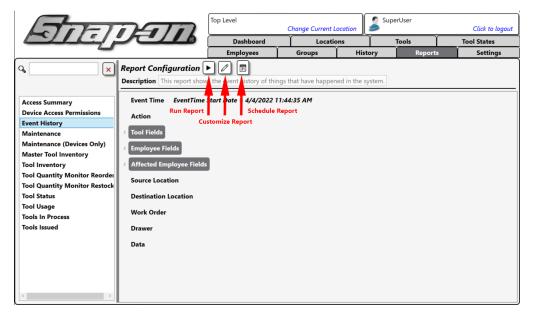
	FIA	11	Top Level	Ch	ange Current Location	SuperUser	Click to logou	
	Line		Dash	board	Locations	Tools	Tool States	
Hide	e 💆 Down	load .	Employ	yees	Groups Hist	ory Repo	rts Settings	
Hide: Archive Im	age Drawer Open Ima			Drav	ver Closed Image	Download		
Image: State of the state								
Clear	ormal: Top Level	ght: STM1	12 - Socket, Deep, 3/4	B", 6-Point				
	ormal: Top Level           122         -         4/25/2022           O Action	ght: STM1		B", 6-Point ⊙ Employee	⊙ Affected Employee	⊙ Source Location	⊙ Destination Location	
Clear iiltering Date	• Action           tool	⊙ Dwr	⊙ Part Number	⊙ Employee		-	0	
Clear iltering 4/18/20 Date	• Action           tool				Affected Employee SuperUser SuperUser	<ul> <li>Source Location</li> <li>2921P999</li> <li>2931P999</li> </ul>	Prototype 0001	
Clear iltering 4/18/20 Date 1/25/2022 11:17:21 AM 4/25/2022 11:17:02 AM	Action     tool     Col Returned     Tool Issued	⊙ Dwr 1	Part Number	© Employee SuperUser	SuperUser	Z92LP999	0	
Clear iltering 4/18/20	Content of the second sec	⊙ Dwr 1	Part Number STM12 STM12	© Employee SuperUser SuperUser	SuperUser	Z92LP999	Prototype 0001	

# Reports

# Overview

The L5 Connect<sup>™</sup> 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> as a whole. These reports can be generated within 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 nearly 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.

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.

If there isn't an icon that represents a Built-In Report – Report that came preloaded with the system.

All **Personal** and **Shared Reports** are created based on one of the **Built-in Reports.** When you select one of these **Built-in** reports, you will be given the **Report Customization Subscreen**. 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, HTML, XLSX, RTF,** and **TIFF**.

2

2

# Generating a Report

To generate a report, you simply need to find which available Report you want to run and click the button.

ADEL	a a a a	Top Level	Change Current Lo	cation Super	rUser	Click to logout
Die		Dashboard	Location	ns 1	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Access Summary       Device Access Permissions       Event History       Maintenance       Maintenance (Devices Only)       Master Tool Inventory       Tool Inventory       Tool Quantity Monitor Reorder       Tool Status       Tool Usage       Tools In Process       Tools Issued	Report Configuration Description This report show Event Time EventTime 3 Action Tool Fields Action Affected Employee Fields Source Location Destination Location Work Order Drawer Data	Start Date = 4/4/2022 1	gs that have happene			
٢						

This will display the results of the desired Report. On this results screen, you can print and export the results.

					p Level	Chang	o Current I oc	SuperU	ser	Clieb to logout
۹ 🖣		s \land 🍂 🤱 🔒 100%	<u> </u>		1/1 🖸	🔟   🏐 🛞 😼 PDF	<ul> <li>Export</li> </ul>	÷		
	-	Print Report				Export Format		Export Report		<u> </u>
Ac		Tool Inventory Report								
Ac	Ľ	Filtered By: Location = Top Leve Run Time: 4/11/2022 12:00 PM		Time		I				
De			Part Number	Description	Drawer	Tool ID	Total Quantity	/ Units		
Eve		Storage Location Name	Part Number	Description	Drawer	100110	Total Quantity	7 Units		
De Eva Ma Ma Toa Toa Toa Toa Toa Toa Toa		Top Level	ToolCrib	Tool Crib		100000	1.00			
K		-								

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.

# Personal Report

Sometimes the preloaded reports do not precisely fit your needs. You can customize these reports so that they can. These modifications are saved as new **Personal Reports**.

When you click on the **Modify Button** *P*, this will open the **Report Customization Subscreen**.

The buttons on this screen allow you to perform several functions on the data.

STOFT	つもつわ	Top Level	Change Current L		rUser	Click to logout
		Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	History	Reports	s Settings
Q X	Report Configuration		gs that have happen		/lodificatio	on 🦉 🧭
Access Summary Device Access Permissions Event History Maintenance Maintenance (Devices Only) Master Tool Inventory Tool Inventory Tool Quantity Monitor Restock Tool Quantity Monitor Restock Tool Status Tool Usage Tools In Process Tools Issued Show/Hide		Ids	ge Mode	x Swidth 1.60	X A	Save/Clear
Show/Thue	Parent Destination Location     Parent Affected Emplo     Parent Group Location	🜵 🚫 🔺 🛡 Typee Location				
						~

#### Time Range Mode

You have three modes to use when you want to filter based on the time.

## $\leftrightarrow$ Between Dates

- ← In the Last X Days
- $\rightarrow$  In the Next X Days

#### Filter Data Object

Depending on the data type, when you click on the volume button, you may need to input a text string or select using a pull-down.

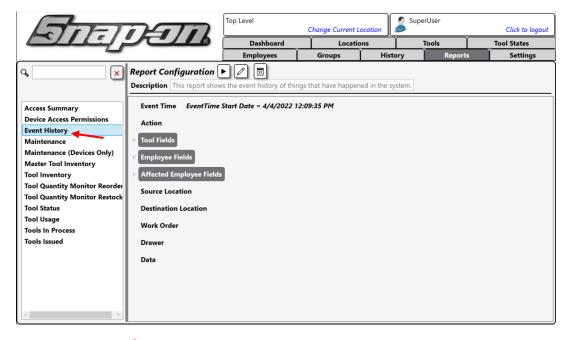
## Moving a Data Object

When using the to use the second sec

STOFT	つきつる	Top Level	Change Current L		perUser	Click to logout					
		Dashboard	Locatio	ons	Tools	Tool States					
		Employees	Groups	History	Reports	Settings					
Q X	Report Configuration	•									
	Description This report show	s the event history of thin	gs that have happen	ed in the system.							
						^					
Access Summary	🗹 Event Time 🛛 — 🗳	7 Days 0 Hour	rs 0 Minutes		•						
Device Access Permissions											
Event History	Action 🕴 🕒 🔺										
Maintenance	Del Tool Fields										
Maintenance (Devices Only)		Data Category									
Master Tool Inventory Tool Inventory	🔺 🗹 Employee Fields  🔺										
Tool Quantity Monitor Reorder											
Tool Quantity Monitor Restock	🗹 Employee 🛛 🕅	୬ ▲▼ <del>▲</del>									
Tool Status	First Name	Data	a Object								
Tool Usage											
Tools In Process	Last Name										
Tools Issued	Middle Name										
	🗆 Title										
	Employee Customer	ID									
	Affected Employee Fiel	ds 🔺 🔻									
< >	Parent Source Location					~					

## Creating a Report

Say you want to run a report for all events for a specific tool, **NT001**. You also wish the Report to show the events that pertain to the Employee **SUPERUSER**. You will begin by selecting an appropriate **Built-in Report** (Event History).



Then click on the 🥕 Modify Button to open the Report Customization Subscreen.

ATT	DATA	Top Level	Change Current L		perUser	Click to logout				
		Dashboard	Locatio	ons	Tools	Tool States				
		Employees	Groups	History	Reports	Settings				
۹ 🛛 🗙	Report Configuration									
	Description This report shows the event history of things that have happened in the system.									
Access Summary	🗹 Event Time 🛛 🛏 👻	7 Days 0 Hour	rs 0 Minutes		•	^				
Device Access Permissions					_					
Event History	Action 🕴 🚫									
Maintenance	Tool Fields									
Maintenance (Devices Only)										
Master Tool Inventory	Employee Fields									
Tool Inventory										
Tool Quantity Monitor Reorder	Affected Employee Fie	lds 🔺 🔻								
Tool Quantity Monitor Restock Tool Status										
Tool Usage	Parent Source Location	n								
Tools In Process	Source Location									
Tools Issued										
	Parent Destination Loc	ation								
	Destination Location	V 🔊 🔺								
	Parent Affected Emplo	yee Location								
	Parent Group Location	i								
< >						~				

Once on that screen, apply the filters so that the Report will generate the desired data. For example, the first filter you will use is **Part Number**.

STOFT	のもつる	Top Level	Change Current L		perUser	Click to logout
		Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	History	Reports	Settings
٩	Report Configuration	_	gs that have happen	ned in the system.		
Access Summary Device Access Permissions Event History Maintenance (Devices Only) Master Tool Inventory Tool Inventory Tool Quantity Monitor Reorder Tool Quantity Monitor Restock Tool Status Tool Usage Tools In Process Tools Issued	✓ Tool Fields ▲ ▼		rs 0 Minutes	× 🔊 🔺	•	
K 5	User02					~

Then scroll down and select the user in the Employee filter.

STOFT	つきつる	Top Level	Change Current L		uperUser	Click to logout
		Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	History	Reports	Settings
	Report Configuration					
	Description This report show	s the event history of thin	gs that have happer	ned in the system.		
	Tolerance (Master)					^
Access Summary						
Device Access Permissions	Tool Parent Fields					
Event History						
Maintenance	🔺 🗹 Employee Fields 🔺	<b>•</b>				
Maintenance (Devices Only)	✓ Employee		2			
Master Tool Inventory						
Tool Inventory						
Tool Quantity Monitor Reorder	Smith, Johr	1 J.				
Tool Quantity Monitor Restock	SuperUser					
Tool Status	Last Name					
Tool Usage	Middle Name					
Tools In Process						
Tools Issued	🗆 Title					
	Employee Customer	ID				
	Affected Employee Fiel     Parent Source Location	ds 🔺 🔻				
<	✓ Source Location 🕴					× .

As you can see, with the different types of filters, the **Part Number** filter required you to type in the Part Number, and the **Employee** filter used a pull-down.

You have not saved the **Personal Report** yet, but you can go ahead and run it to see if the results you get are correct. Press the ► to run the Report and preview the results.

# L5 Connect<sup>™</sup> Administration Guide

STOFT	つきつわ	Top Level	Change Current L		uperUser	Click to logout
		Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	History	Reports	Settings
	Report Configuration					
	Description This report show	is the event history of thin	gs that have happen	ed in the system.		
	· · ·		5 11	,		
Access Summary	🗆 Tag					
Device Access Permissions						
Event History	Tolerance (Pocket)					
Maintenance	Tolerance (Master)					
Maintenance (Devices Only)						
Master Tool Inventory	Tool Parent Fields					
Tool Inventory	▲ I Employee Fields					
Tool Quantity Monitor Reorder						
Tool Quantity Monitor Restock	🗹 Employee  🗙 Su	iperUser 🗙 🚫 🖌				
Tool Status						
Tool Usage						
Tools In Process	First Name					
Tools Issued	L First Name					
	Last Name					
	Middle Name					
	🗆 Title					
	Employee Customer	ID				
< >						~

When you run the Report, you see the results. Using this view, you can change the order of the columns, remove unwanted columns and change the column width to suit your preferences and needs.

ⓑ @ ≶ # 2 & 1	00%		1/2		🗟 🛞 PDF 🔹 Export	÷	
Event History Report							
	oplevel EventTim	e Start Date = 4/	6/2022 2:16:51 PM	A Part Number	r = NT001, Employee = SuperUs	er	
Run Time: 4/13/2022 2:1					······································		
Event Time	Action	Part Number	Description	Tool ID	Employee	Affected Employee	Sou
4/13/2022 1:44:00 PM	Tool Added	NT001	New Tool 001	100280	SuperUser		Тоо
4/13/2022 1:44:00 PM	Tool quantity	NT001	New Tool 001	100280	SuperUser		Too
4/13/2022 1:44:00 PM	changed Tool master	NT001	New Tool 001	100280	SuperUser		Too
	tool changed						100
4/13/2022 1:44:00 PM	Tool home location	NT001	New Tool 001	100280	SuperUser		
4/11/2022 2:32:33 PM	changed Tool custom id	NT001	New Tool 001	100274	Current la en		Тоо
4/11/2022 2:32:33 PM	changed	NTOUT	New 1001001	100274	SuperUser		100
4/11/2022 2:32:33 PM	Tool serial number	NT001	New Tool 001	100274	SuperUser		Too
	changed						
4/11/2022 2:32:25 PM	Tool custom id changed	NT001	New Tool 001	100273	SuperUser		Тоо
4/11/2022 2:32:25 PM	Tool serial number	NT001	New Tool 001	100273	SuperUser		Тоо
	changed						
4/11/2022 2:29:22 PM	Tool custom id	NT001	New Tool 001	100272	SuperUser		Тоо

When the Report looks good, you no longer need to make any additional modifications. You are ready to SAVE the new **Personal Report**.

To Save the Report, close the results page and click on the SAVE button in the upper right of the screen.

# L5 CONNECT<sup>™</sup> ADMINISTRATION GUIDE

GOFT	ロモフル	Top Level	Change Current L		perUser	Click to logout
		Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Q X	Report Configuration	•				
	Description This report show	s the event history of thin	gs that have happen	ned in the system.		
						^
Access Summary	🗆 Tag				· · · · · ·	
Device Access Permissions						
Event History	Tolerance (Pocket)					
Maintenance	Tolerance (Master)					
Maintenance (Devices Only)						
Master Tool Inventory	Tool Parent Fields					
Tool Inventory	✓ Imployee Fields					
Tool Quantity Monitor Reorder						
Tool Quantity Monitor Restock	🗹 Employee  🗙 Su	perUser 🗙 🚫 🖌				
Tool Status						
Tool Usage						
Tools In Process	First Name					
Tools Issued	First Name					
	🗆 Last Name					
	Middle Name					
	🗆 Title					
	Employee Customer	ID				
						~

You will be prompted to name the new Report and give it a short description. For example, call this **NT001 Superuser Report**. In the description, write **Event History on Tool NT001 and Employee SUPERUSER**. Then click **SAVE**.

		Top Level			perUser	
Lan-1	DETA		Change Current L	ocation		Click to logout
		Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Access Summary Device Access Permissions Event History Maintenance (Devices Only) Master Tool Inventory Tool Quantity Monitor Reorder Tool Quantity Monitor Restock Tool Status Tool Status Tool Status Tools In Process Tools In Process Tools Issued	Toleran Descriptio	Save a new 0001 Superuser Report		ystem.		

You will now see the new Personal Report on the list of available reports on the left.

ADET		Top Level	Change Current Lo		SuperUser	Click to logout
	DEIN	Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	Histo	ry Report	s Settings
	Report Configuration					
	Description Event History on	Tool NT001 and Employee	SUPERUSER			
						^
Access Summary	Action					
Device Access Permissions	Tool Fields					
Event History	Part Number Part N	lumber = NT001				
Maintenance	Part Number Part N	iumber = N1001				
Maintenance (Devices Only) Master Tool Inventory	Description					
NT001 Superuser Report 🖄	Tool ID					
Tool Inventory						
Tool Quantity Monitor Reorder	Employee Fields					
Tool Quantity Monitor Restock	Employee Employee	e = SuperUser				
Tool Status						
Tool Usage	Affected Employee Fields					
Tools In Process	Source Location					
Tools Issued	Destination Location					
	Work Order					
< >	Drawer					
	Data					~

At this time, you are the only person able to use this Report. This is represented by the icon beside it. If you want to allow other employees to run this Report, you will need to **SHARE** it.

To delete a report, select it from the list, then click the  $\bigcirc$  button at the bottom of the list to delete it.

NOTE: A personal Report can be deleted but the built-in reports cannot. Once deleted it cannot be restored.

> NOTE: Each built-in report has its own set of Data Groups and Objects. Find the one that has the information you want to capture and customize it from there.

# Sharing a Personal Report

Once you have created a **Personal Report**, only you can use it. But what if someone else in your organization wants to run that same Report. You can share a personal report so that everyone has access.

This process is as simple as clicking a single button and setting a few options. First, select the Personal Report you want to share. Then click on the  $[\square]$  button at the top of the **Report Properties** sub-screen.

STOFT	DETR	Top Level	Change Current L		perUser	Click to logout
		Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	History	Reports	Settings
	Report Configuration					
	Description Event History on	Tool NT001 and Employee	SUPERUSER			
						^
Access Summary	Action	•				
Device Access Permissions	Tool Fields					
Event History Maintenance	Part Number Part N	lumber = NT001				
Maintenance (Devices Only)						
Master Tool Inventory	Description					
NT001 Superuser Report	Tool ID					
Tool Inventory	<b>F 1 1 1</b>					
Tool Quantity Monitor Reorder	Employee Fields					
Tool Quantity Monitor Restock	Employee Employee	e = SuperUser				
Tool Status	Affected Employee Fields					
Tool Usage Tools in Process						
Tools Issued	Source Location					
	<b>Destination Location</b>					
	Work Order					
< >						
	Drawer					
	Data					~

You will be presented with a warning dialog explaining that you can save or cancel the share on the next screen.

Access Summary Tag
Sharing this report will allow all users to run the report. Click the save button to share or the
ma cancel button to cancel.
Ma
Тос
Тос
Tool Status

Click the OK button to continue.

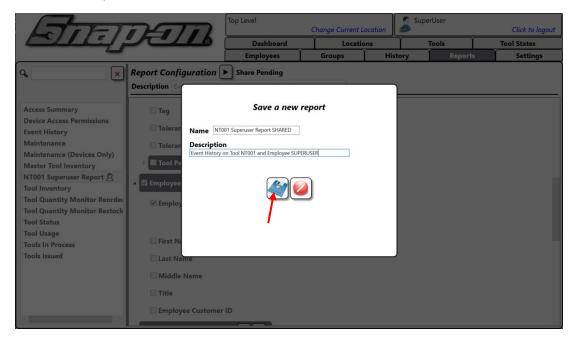
The Report will display pending shares. Therefore, you can make any modifications to it if you need to before you save it.

ADET	ロモフル	Top Level	Change Current L		perUser	Click to logout
		Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	History	Reports	Settings
۹ ×	Report Configuration					
	Description Event History on	Tool NT001 and Employe	e SUPERUSER			
Access Summary	🗆 Tag					^
Device Access Permissions Event History	Tolerance (Pocket)					
Maintenance	Tolerance (Master)					
Maintenance (Devices Only)	Tool Parent Fields					
Master Tool Inventory	lool Parent Fields					
NT001 Superuser Report 🖄	▲ 🗹 Employee Fields 🔺	<b>T</b>				
Tool Inventory						
Tool Quantity Monitor Reorder	🗹 Employee 🛛 🗙 Su	perUser 🛛 🗙 🗍 🚫	<b>↓</b>   ▼			
Tool Quantity Monitor Restock						
Tool Status						
Tool Usage Tools in Process	First Name					
Tools In Process						
Tools Issued	Last Name					
	Middle Name					
	🗆 Title					
	Employee Customer	ID				
< →						~
L						

Click the SAVE button to apply the changes to the Report. You will again be presented with a dialog box. This time it will ask if you want to create this Shared Report as a **NEW** report or just **UPDATE** and convert the existing one to a Shared Report. You want to create a new one because you want to keep our original to yourself if you're going to make some modifications later.

GITT	DETR	Top Level	Change Current L		perUser	Click to logout
		Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Access Summary	Report Configuration		ee SUPERUSER			n
Maintenance (Device Master Tool Invento NT001 Superuser Re Tool Inventory Tool Quantity Monit Tool Quantity Monitor resource Tool Status Tool Usage	d you like to upda	update	New	create a n	ew report	?
Tools In Process Tools Issued	First Name Last Name Middle Name Title Employee Customer					

When you click **NEW**, you will need to set the NAME, and DESCRIPTION like you did when you first created the Report. Then click the SAVE button.



Now you can see that both the Personal and Shared Reports are in the list of available reports on the left.

जितनार	<b>A</b> D	Top Level	Change Current L		SuperUser	Click to logout
		Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	History	Reports	Settings
Access Summary	Report Configure Description Event H	ation <b>&gt;</b> 🖉 🗊 istory on Tool NT001 and B	Employee SUPERUS	ER		^
Device Access Permissions Event History Maintenance Maintenance (Devices Only) Master Tool Inventory NT001 Superuser Report SHARED NT001 Superuser Report Tool Inventory Tool Quantity Monitor Reorder Tool Quantity Monitor Restock	<ul> <li>Tool Fields</li> <li>Part Number</li> <li>Description</li> <li>Tool ID</li> <li>Employee Fields</li> </ul>	Part Number = NT001 mployee = SuperUser				
Tool Status Tool Usage Tools In Process Tools Issued	Source Location Destination Locat Work Order Drawer Data					7

NOTE: If your report name is long, you can expand the Report List window by clicking and dragging the vertical GREY line to the right of the list window.

# Scheduling a Report

You can set a schedule so that the system will auto-generate any Report—saving you the time doing it manually. This schedule can be set for an Employee or a Group.

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 generate 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.

जितनगर		Top Level	Change Current L		SuperUser	Click to logout
		Dashboard	Locatio	ons	Tools	Tool States
Ĵ		Employees	Groups	History	Reports	Settings
	Report Configur	ation 🕨 🖉 👼				
	Description This rep	port shows the tools that are	e currently checked	out of the syste	m.	
Access Summary	Storage Location	Fields				
Device Access Permissions	Dool Fields	•				
Event History						
Maintenance	Issued Time					
Maintenance (Devices Only)	Issued Quantity					
Master Tool Inventory						
NT001 Superuser Report SHARED	Units					
NT001 Superuser Report 🖄	Employee Fields					
Tool Inventory						
Tool Quantity Monitor Reorder	Work Location					
Tool Quantity Monitor Restock Tool Status	Sub Location					
Tool Usage						
Tools In Process	Work Order					
Tools Issued	Mgd Out of Box					
10015 ISSUEU						

To set up this schedule, select the Tools Issued Report. Then click on the Schedule 🗊 button.

This will open the Schedule dialog.

Creating scheduled report: Tools Issued       Description
Destination         Employee         O Group         SuperUser         ✓           Attachment         Date/Time         Language
Attachment Date/Time Language
Format Inline × English (United States) × English ×
Days Week Days Sun Mon Tue Wed Thu Fri Sat
Time         5         :         00         PM         ✓         (UTC-06:00) Central Time (US & Canada)         ×

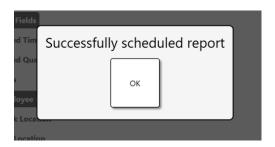
You can now fill out the schedule information to fit our example.

Description – Daily Issue Tool Check Destination – Supervisors Group Format – Pdf English Days – Weekdays M-F Time – 5:00 PM UTC-06:00 Central Time

Once entered, click SAVE to set the schedule.

जिल्लामा	Top Level	Change Current L		erUser	Click to logout
Blepel	Dashboard	Locatio	ons	Tools	Tool States
	Employees	Groups	History	Reports	Settings
Access Summary Device Access Permissions Event History Maintenance Maintenance (Devices Only) Master Tool Inventory NT001 Superuser Report A Tool Inventory Tool Quantity Monitor Reorder Tool Quantity Monitor Restock Tool Status Tool Usage Tools In Process Med Oct	figuration       Image: Constraint of the second seco	are currently checked	d out of the system.		Settings
Tools Issued					

You will receive a confirmation dialog when the schedule has been set.



To verify that the schedule has been set, you can go to the Supervisors Group and look at the **Subscriptions** tab. You will see the scheduled Report listed.

ADET	n ann	Top Level	c	hange Current Loco	ation	ser	Click to logout
	I III	Dasht	ooard	Locations	Too	ols T	ool States
<u> </u>		Employe	ees	Groups	History	Reports	Settings
Name       Maintenance       Supervisors	Scheduled Reports -	NOTE: Emai	il Server is not		ifications will not be Email Alerts ⊙Ema	and a first and a first and a first and a first a first and a first a first and a first a firs	tatuses Text Al
				configured. Not	ifications will not be		
Show Deleted Items	○ Title         ○ Description           ools Issued         Daily Issued	· · · · · · · · · · · · · · · · · · ·	Time	E-00 DM Control Standa	rd Time Pdf, English en-U	Source Location	on 📀 Employ
	<	Nons Report   Mon	The wea find Fi	5.00 PM Central Standa	na mine   rai, ciigiish en-u		>

Select it in the Subscriptions tab and click on the  $\bigcirc$  button to delete a schedule.

GOFT	ロモフル	Top Level	Change Current Location	SuperUser		Click to logout
		Dashboard	Locations	Tools	Too	States
2		Employees	Groups	istory	Reports	Settings
Name       Maintenance       Supervisors	Supervisors Info Profiles Membe Notifications	NOTE: Email Server is	not configured. Notificati Email All Statuses Email	Card Contraction (1997)	and the second second	Juses Text Al
Show Deleted Items	Scheduled Reports -	ption 🕞 Time	not configured. Notificatio		ent. Source Location Top Level	© Employ

# Settings

This section will go over the settings of the Admin Client that you have not discussed yet. All these options can be found in the **Settings** tab of the L5 Connect<sup>™</sup> Admin Client.

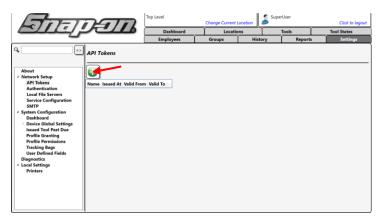
## About

This screen will display the current software version the L5 Connect<sup>™</sup> Service is running.

# Network Setup

## API Tokens

This screen allows you to create and assign tokens used for API access. This feature requires an Advanced License. To generate a token, click on the CREATE button.



Assign the Token to a user with API permissions. Then set the time that the Token is valid.



The Token is now created.

नितन	n ann	Top Level	Change Current L	ocation	Super	rUser	Click to logout
		Dashboard	Locatio	ns		Tools	Tool States
		Employees	Groups	Histo	ory	Reports	Settings
About     About     Arcont Setup     Artenork Setup     Authentication     Local Tile Servers     Service Configuration     SMTP     System Configuration     Dathboard     Device Global settings     Profile Permissions     Tracking Bars     User Defined Fields     Diagnostics     Local Settings     Printers		Token ID	2023 12.00.00 AM (D)				bken ID

## Service Configuration

These are the settings to connect your Admin Client to a L5 Connect<sup>™</sup> service running on a Windowsbased PC or Server. These fields are set using the **Service Configuration** program.

Service Name – The name of the Service Instance you are connecting to Service Computer – The DNS Hostname of the machine running the service Port – The TCP port in which you will connect clients and devices to the service Streaming Port – The TCP port that the service will communicate back and forth with devices File Server Path – The SMB pathname of a network share that will store images from devices Database Server – The Location of the L5 Connect<sup>™</sup> Database Get Data from Service – tells admin clients to get all data from the service rather than connecting directly to the database.

**Use System Service as a time server for devices** – This allows you to use the system time on the service computer to set the time on all devices. (If System and Devices are on a domain this is not needed).

#### SMTP

These are the settings used to configure the L5 Connect<sup>™</sup> ability to e-mail employees Alerts and Scheduled Reports. First, check the box to enable the SMTP Mail service. Next, you will be presented with the following options. Once you have entered the information, click the SAVE button.

ADEL	a da la	Top Level	Change Current L	ocation 1	SuperUser	Click to logout
SIE		Dashboard	Locatio	ons	Tools	Tool States
		Employees	Groups	Histo	ory Repor	ts Settings
٩		Employees	_			

NOTE: You will need to set an email address to any employee that needs to receive emails. This can be done from the Employee details.

SMTP Host – the e-mail server that will handle SMTP request
SMTP Port – the port that the SMTP server will communicate on
From Address – the e-mail address that will be used to send messages
From Name – The name that will appear on e-mails sent from L5 Connect™
Use SSL – setting to enable SSL encryption
User Name – username used to authenticate with the SMTP server

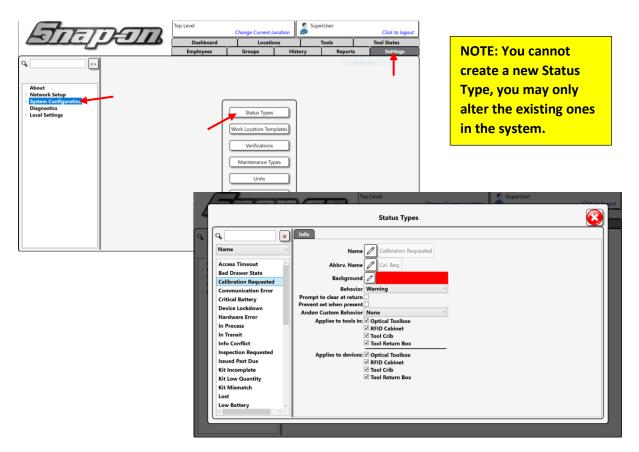
**Change Password** – password used to authenticate with the SMTP server

# System Configuration

# Status Types

The L5 Connect<sup>™</sup> system uses **Status Types** to inform you of the current state of a **L5 Connect<sup>™</sup> Device** or **Tool**. This can be anything from missing or misplaced tools to maintenance alerts or outages.

You can view and change the properties of a **Status Type** by going to **Settings->System Configuration** and clicking on the **Status Types** button. You will see a list of Status Types in the system, and when you select one, you will see its properties. A few of the Status Types are reserved and have limited editing ability.



The properties of the Status Type are: Name

- Name
- Abbrv. Name
- Background
- Behavior
- Prompt to clear at return
- Prevent set when Present
- Andon Custom Behavior
- Applies to tools in
- Applies to devices

# Background

You may want to change the color of the **Background**. Click the  $\checkmark$  button. A color selection screen will appear. Make your selection, then click the  $\checkmark$  button. Click the SAVE button when you are done.

Top Level	SuperUser
Status Types	<u> </u>
Name     Name       Access Timeout     Name       Bad Draver State     Calibration Requested       Collbration Requested     Abbrv. Name       Communication Error     Backgroup       Critical Battery     Backgroup       Prompt to clear at return     Prompt to clear at return       Prompt to clear at return     Prompt to clear at return       Prompt to clear at return     Prompt to clear at return       Prompt to clear at return     Prompt to clear at return       Prompt to clear at return     Prompt to clear at return       Andon Custom Behavior None     Applies to tools in: 3 Optical Toolbox       In Transit     Tool Chib       Info Conflict     Tool Return Box       Issued Past Due     Kit Low Quantity       Kit Mindmatch     Of tool Return Box       Low Battery     Tool Return Box	



	Status Types	
Access Timeout       Bad Drawer State       Calibration Requested       Communication Error       Critical Battery       Device Lockdown       Hardware Error       In Process       In Transit       Info Conflict       Inspection Requested       Issued Past Due       Kit Low Quantity       Kit Mismatch       Lost       Low Battery	Info	

#### **Behavior**

A Status Type Behavior determines how the system alerts and reports the status when applied. The behaviors are:

#### Info Only

- Causes status indicator to appear on device tool lists (white Background with ① 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

You can change the **Behavior** of the status **Calibration Requested**. Right now, it is just a **Warning**, but your company may want to flag a low battery as an **Alert**. Just use the pull-down to change the **Behavior**, then click the SAVE button in the upper right corner of the screen.

	( herea (	SuperUser	Click to logout	
	Status Types Info Name Calibration Requested			
Access Timeout Bad Drawer State Calibration Requested Communication Error Critical Battery	Abbrv. Name 2 Cal. Req. Background 2 Background Participation Cal. Req. Background 2 Cal. R		Top Level SuperUs Status Types	er etiskas lanput
Critical Battery Device Lockdown Hardware Error In Process In Transit Info Conflict Inspection Requested Issued Past Due Kit Licomplete Kit Licomplete Kit Licow Quantity Kit Mismatch Lost Low Battery	Prevent set when present Andon Custom Behavior None Applies to tools in: © Optical Toolbox	Access Timeout Bad Drawer State Calibration Requested Communication Error Critical Battery Device Lockdown Hardware Error In Process In Transit Info Conflict Inspection Requested Issued Past Due Kit Low Quantity Kit Mismatch Lost Low Battery	Info Name Calibration Requested Abbry, Name Calibration Requested Abbry, Name Calibration Requested Background Calibration Requested	

## Device Global Settings

#### Shutdown Power Off Delay

This screen will allow you to set the delay from when a device is commanded to shut down till it powers off.

#### Time synchronization

This screen will allow you to set the L5 Connect<sup>™</sup> service as an NTP Time Server.

#### Unlock Banner

This screen will allow you to define a message that will display on any device when an employee logs in.

#### Issued Tools Past Due

You can set a Past Due status to be automatically applied if a tool is not returned within a specific timeframe. Clicking on the checkbox will enable this setting, and you can define in Days, Hours, and Minutes how long till the tool is set as past due.

#### **User-Defined Fields**

This screen allows you to set custom data fields that can be used on Tool instances.

#### Diagnostics

This screen will allow you to download the system logs for the L5 Connect<sup>™</sup> Service.

## Local Settings – Printers

This screen allows you to set your Label and Receipt printer.

# APPENDIX A – L5 Connect<sup>™</sup> Permissions

Employees		
	Add/Remove	Add and remove employee accounts
	Admin Client Access	Promote a standard Employee account to an Admin
	Edit	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
1		Employee
Locations	Device Edit	Change the properties of a Tool Control Dovice
		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	Assign Tool to Work Location in Selected Location
	Location	Charle aut Taal fram Davies in Lagatian
	Issue Tools From Device	Check out Tool from Device in Location
	Notifications Edit	Change Notification Settings for a Location
	Organizational	Change Org Location Object Properties
	Location Edit	Change org Location Object Properties
	Tool Crib Attendant	Enables Employee to sign in as Crib Attendant
	View Event	View Events of Location
	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		
DEVICES	Access	Access a device to check out/in tools
	Access with Multiple	Disable to deny users log in at a device if they have tools
	Device Issued Tools	issued from another device.
	Add/Remove from	Add/remove a device from a service
	Service	
	Audit	Enables Audit Mode Access

	Bypass Biometrics Access	Disable this option to require Biometrics for Device Login
	Bypass Second Badge Verify	Disable this option to require 2nd Badge for Verification
	Date Time	Change Date/Time Settings in System Menu
	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 Training - Drawer	Enable Full Drawer Training
	Tool Training - Single	Enables Single Tool Training
	Volume	Change Sound Volume of Voice Statements from Device.
Status		
	Calibration Requested Clear	Clear Status Calibration Requested
	Calibration Requested Set	Set Status Calibration Requested
	Inspection Requested Clear	Clear Status Inspection Requested
	Inspection Requested Set	Set Status Inspection Requested
	Lost Clear	Clear Status Lost
	Lost Set	Set Status Lost
	Needs Confirmed Clear	Clear Status Needs Confirmed status
	Not Available Clear	Clear Status Not Available
	Not Available Set	Set Status Not Available
	Not Issued Clear	Clear Status Not Issued
	Not Issued Set	Set Status Not Issued
	Not Received Clear	Clear Status Not Received
	Not Received Set	Set Status Not Received
	Not Returned Clear	Clear Status Not Returned
	Not Returned Set	Set Status Not Returned
	Out For Maintenance Clear	Clear Status Out For Maintenance
	Out For Maintenance Set	Set Status Out For Maintenance
	Out for Replace or Repair Clear	Clear Status Out for Replace or Repair Clear
	Out for Replace or Repair Set	Set Status Out for Replace or Repair Clear
	Repair Requested Clear	Clear Status Repair Requested

# L5 CONNECT<sup>™</sup> ADMINISTRATION GUIDE

	Repair Requested Set	Set Status Repair Requested
	Replacement	Clear Status Replacement Requested
	<b>Requested</b> Clear	
	Replacement	Set Status Replacement Requested
	Requested Set	
	Status Change for	Change Status for tool issued to another user
	Other Issued Tool	
System Configuration		
	Audit Typed Edit	Change audit type
	Certification 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
	Units Edit	Edit Unit values
	Verifications Edit	Edit Verification Settings
	Work Location Template Edit	Edit Work Location Templates
Tools		
	Home Location Change	Change Location of Tool Instance
	Info Edit	Change Tool Properties
	Info View	View Tool Properties
	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

# APPENDIX B – L5 Connect<sup>™</sup> Licenses

Part Number	Description
L5CONNECT	L5 Admin software
L5CONNECTAPI	API license 1yr
L5TSCC011N	True Crib Admin w/1 Seat
L5TSS0011N	1 True Crib Seat License 1YR
L5TSC0011M	Annual Support 1 True Crib Seat

# KEY:

Server & ATC	
Server Add-on	
Tool Crib	

# APPENDIX C - Common Icons

ICON	FUNCTION
	CREATE/NEW
	DELETE
	OK/ACCEPT
	EXIT/LOGOUT
	SAVE
	DISCARD CHANGES
<b>**</b>	ADMINISTRATION MODE
	IMPORT WIZARD
	DIAGNOSTICS



# USA

Snap-on Industrial Automated Tool Control Group 309 Exchange Avenue Conway, Arkansas 72032 Customer Service Number 1-800-272-2033 Fax: (501) 450-1585

#### **Snap-on Tools International LLC**

2801 80th Street Kenosha, WI 53143 For General Inquiries, 262-656-5200

# Southeast Europe - Middle East

(SEEMEA) Division PO Box 65 033 Athens 15410, Greece Tel: +30 210 6724828 Fax: +30 210 6725754 E-mail: snap\_mead@ath.forthnet.gr

#### **United Kingdom**

Industrial Sales Division - Snap-on Tools Telford Way 38a, Telford Way, Kettering Northants NN16 8UN, England Tel: +44 (0) 1536 413904 Fax: +44 (0) 1536 413874 E-mail: industrialuk@snapon.com

## Snap-on Tools (Australia) Pty LTD

National Distribution Centre Unit 6/110 Station Road P.O. Box 663 Seven Hills, NSW 1730 Australia Tel: (61) 2-9837-9100 Fax: (61) 2-9624-2445 E-mail: sots.webmasters@snapon.com

# Snap-on Industrial Belgium & Luxembourg Division SNA Germany GmbH Auf dem Huls 5 40822 Mettmann Germany Tel: +32 - (0) 14-231967 Fax: +32 - (0) 14-232627 E-mail: industrial.be@snapon.com

#### **Snap-on Industrial Germany Division**

SNA Germany GmbH Auf dem Huls 5 40822 Mettmann Germany Tel: +49-(0) 2104-950-911 Fax: +49-(0) 2104-950-999 E-mail: indus.germany@snapon.com

#### **Snap-on Industrial Netherlands**

SNA Germany GmbH Auf dem Huls 5 40822 Mettmann Germany Tel: +31-(0)20-5682664 Fax: +31-(0)20-5682660 E-mail: industrial.nl@snapon.com

#### Snap-on Tools Italia S.r.l

Via Bizet, 43/45 20092 Cinisello Balsamo (MI), Italy Tel: +39 02 66 04 53 70 Fax: +39 02 61 29 78 15 E-mail: indus.italia@snapon.com

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