Snap-on

L5 Connect™ Administration Guide

Version 3.0

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Introduction

Thank you for your purchase of L5 Connect™. This guide is the complete resource for managing your **L5 Connect™ Service**.

L5 Connect™ 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™ 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™ 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® 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.

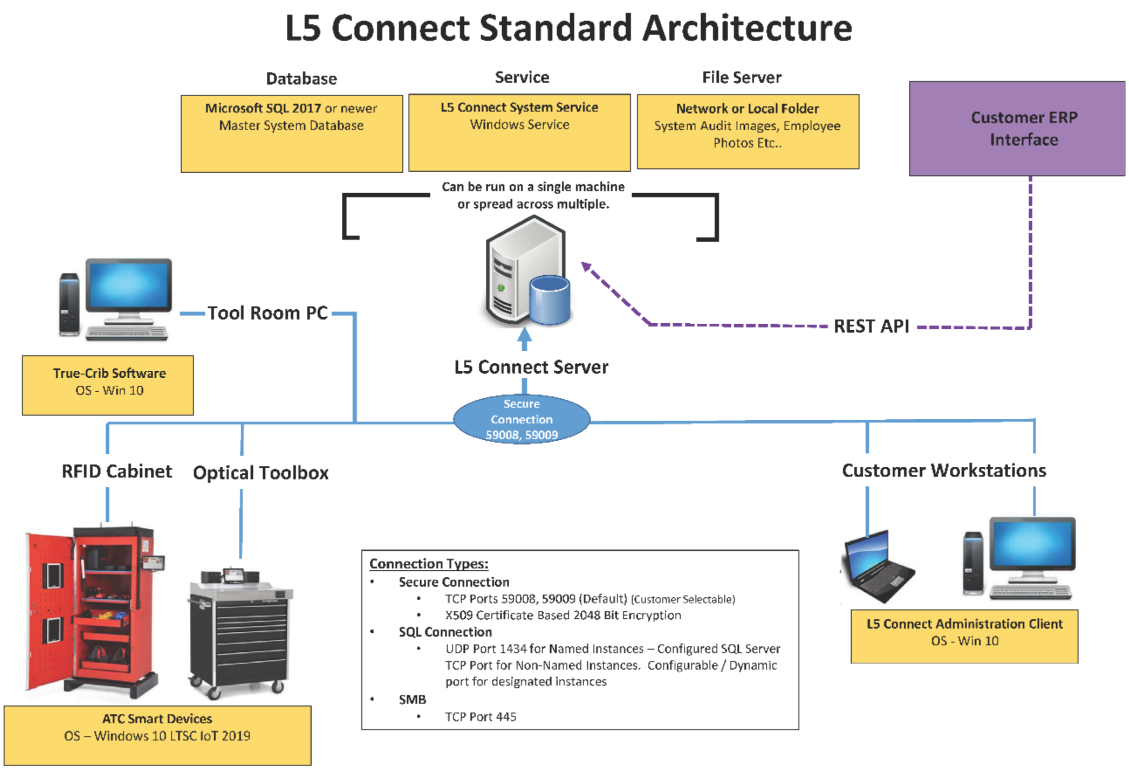
Once again, thank you for your purchase, and welcome to the L5 Connect™ family.

Note: L5 Connect™ is an extremely efficient solution to tool control. Yet, a robust Tool Control program with L5 Connect™ 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™ 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™ Database

The L5 Connect™ 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™ Service manages all Data within this database.

L5 Connect™ Service

The core component of the system is the L5 Connect™ 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™ Service is interrupted, L5 Connect™ devices will continue to function while disconnected. The devices will hold their event history in local storage until the connection is reestablished.

L5 Connect™ Administration Client

The L5 Connect™ 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™ Administration Client in detail.

True-Crib™

True-Crib™ is a L5 Connect™ 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™ Service to function like all other components. While a constant connection to the L5 Connect™ service is preferred, True-Crib™ will continue to operate during occasional, short-term connection interruptions. Please refer to the **True-Crib™ Users Guide** for detailed information about True-Crib™.

ATC Toolbox

The ATC Toolbox is a L5 Connect™ device that connects to the L5 Connect™ 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™ ATC Device Operations Guide** for more information about the ATC Toolbox.

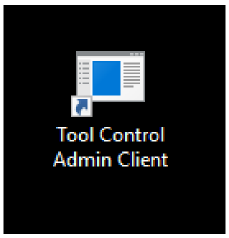
ATC Locker

The ATC Locker, like the ATC Toolbox, is a L5 Connect™ device that connects to the L5 Connect™ 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™ ATC Device Operations Guide**.

Administration Client – Getting Started

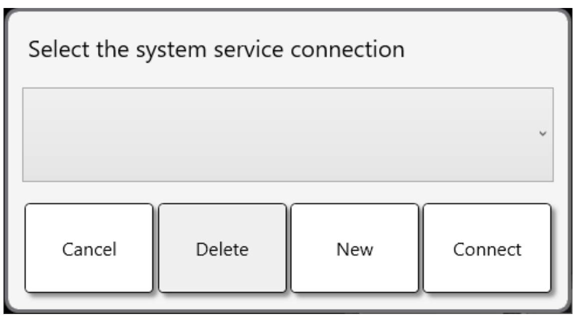
The **L5 Connect™ Administration Client** is the tool you will use to manage L5 Connect™. It can generate reports, create, and manage users & groups, and set e-mail and text alerts if there are any issues. In addition, you can create and manage your tools, set maintenance and quantity monitors, and much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

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.



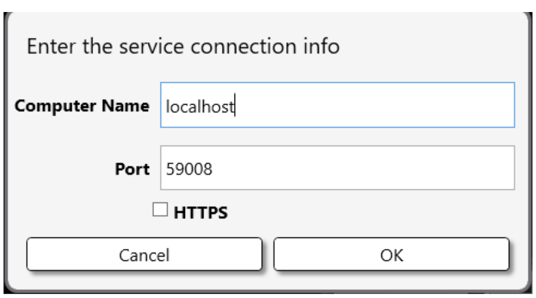
Connecting to the L5 Connect Service™

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



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

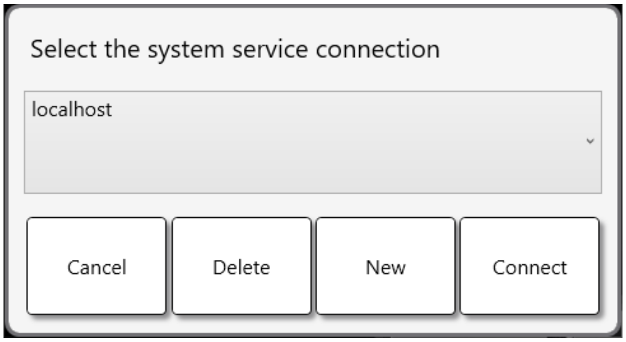
Click **New**; this will open the connection info screen



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.

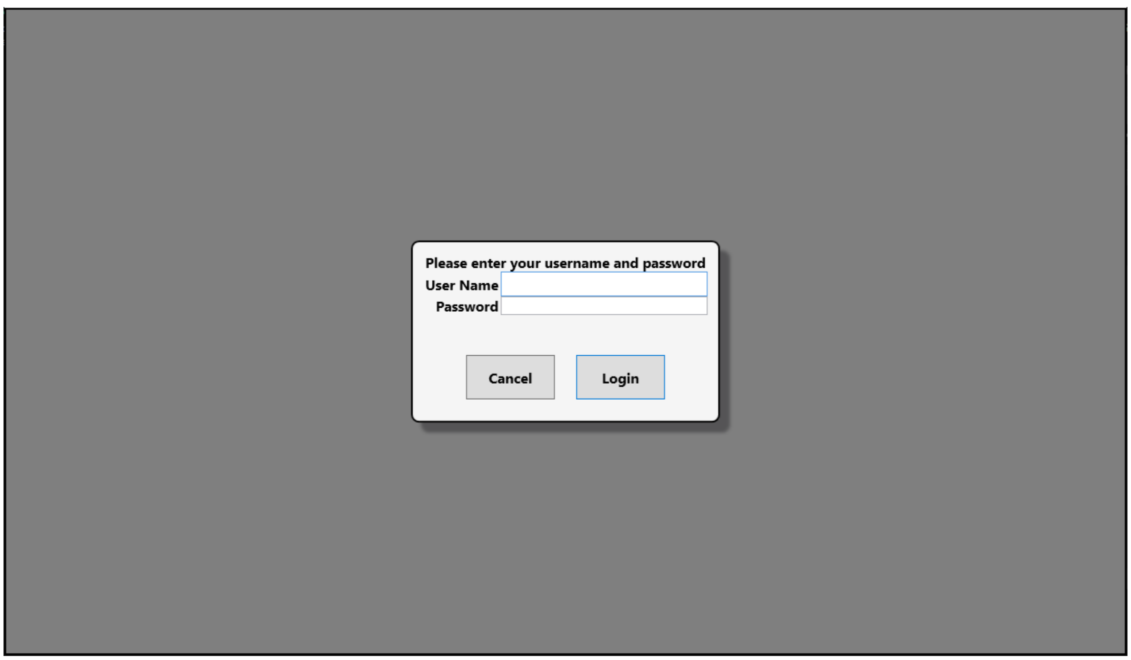


Click Connect to access the service.

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 username and password are:
Username: **superuser**
Password: **superuser**
Superuser's default badge ID is: **14231142**

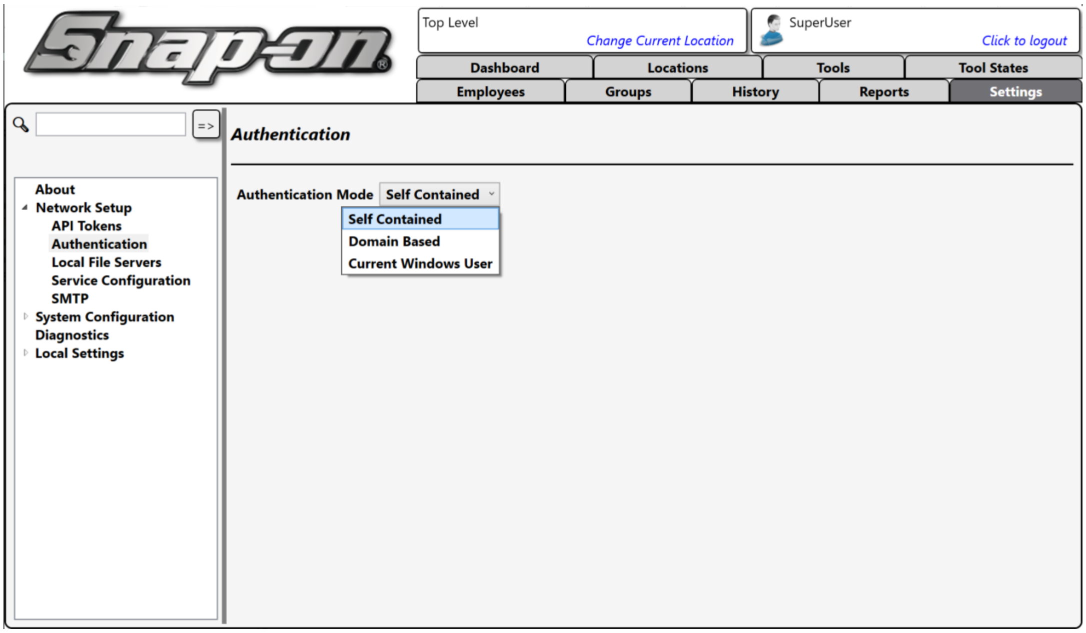
NOTE: It is recommended to change the password and badge # of superuser as soon as you log in. Please make sure to note the new superuser password.



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

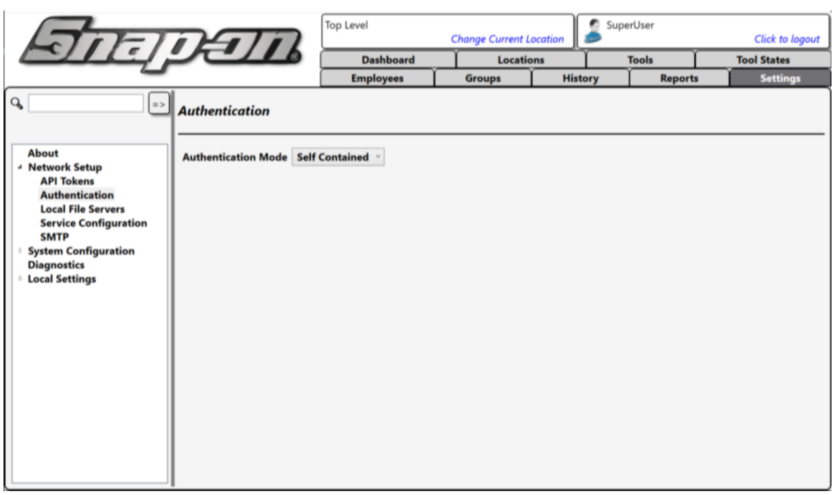
Admin Client Authentication

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



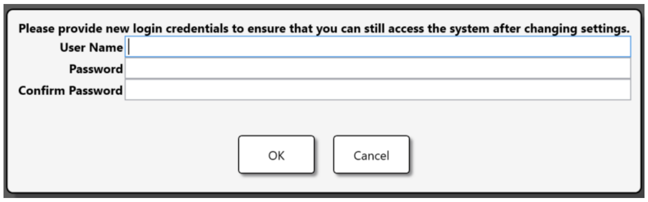
NOTE: These Authentication Methods are only used to access the Admin Client. ATC Devices still require the use of a RFID Badge. For more information about ATC Device access see the ATC Device Operation Guide.

Self-Contained – This is the default method of authentication. It uses the L5 Connect™ 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.

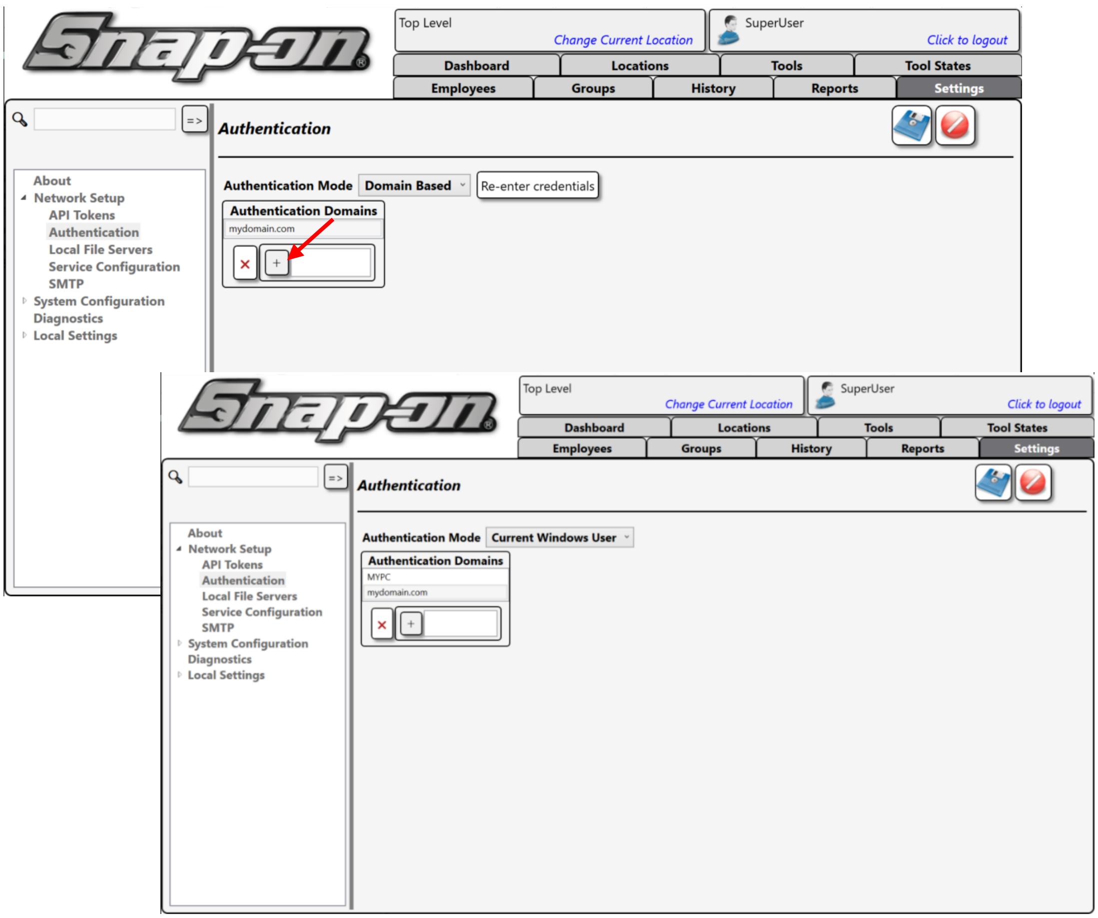


Domain Based – This method utilizes an Active Directory domain to handle the access request. A user account must exist in AD and match the username of an Admin account in the system. You use an AD username and password to access the administrative functions in this mode.

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.



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 ❌ button to remove a domain.



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.

Navigation tabs

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™ to your needs.

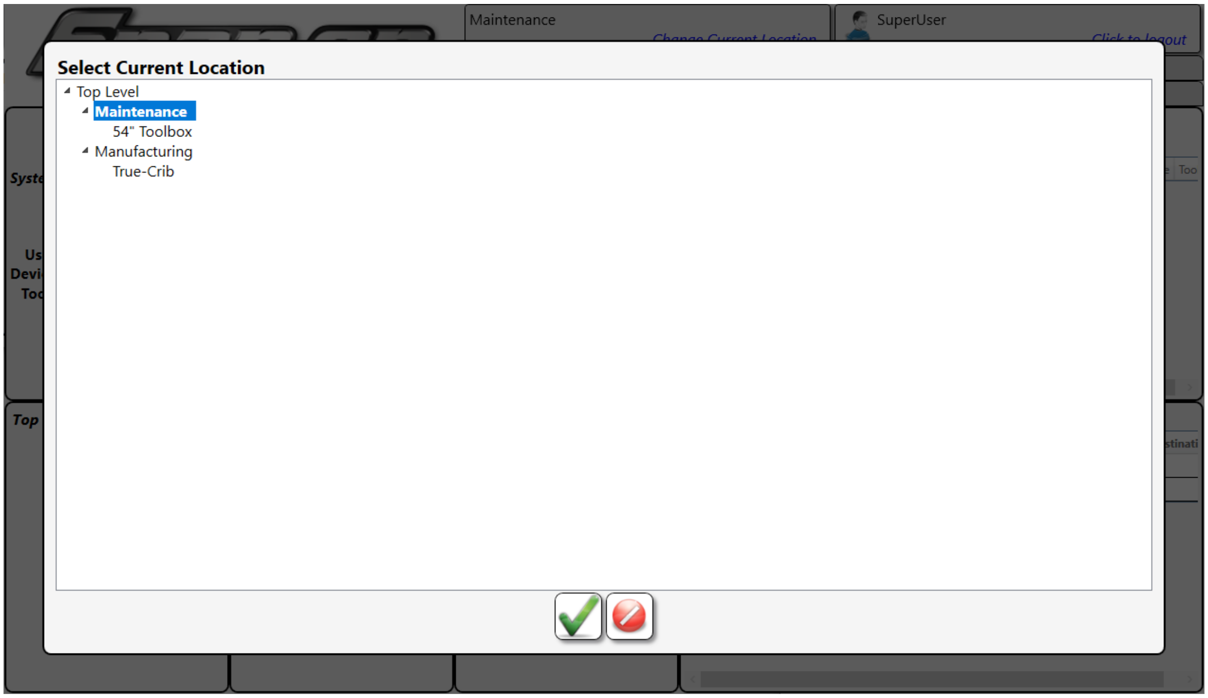
Session Bar

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.

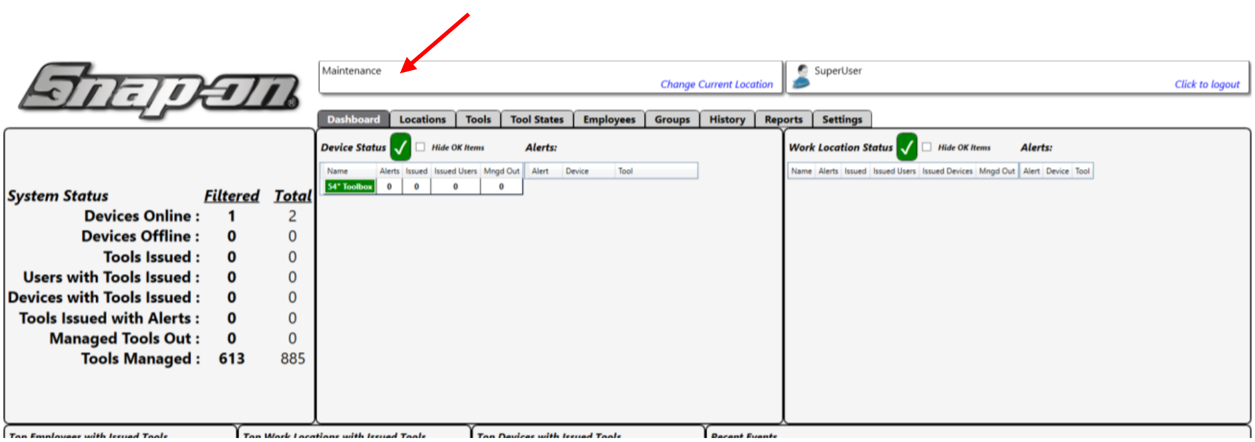
When you click the **Currently Logged in User** button, your session will end, and you are returned to the login screen.

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.

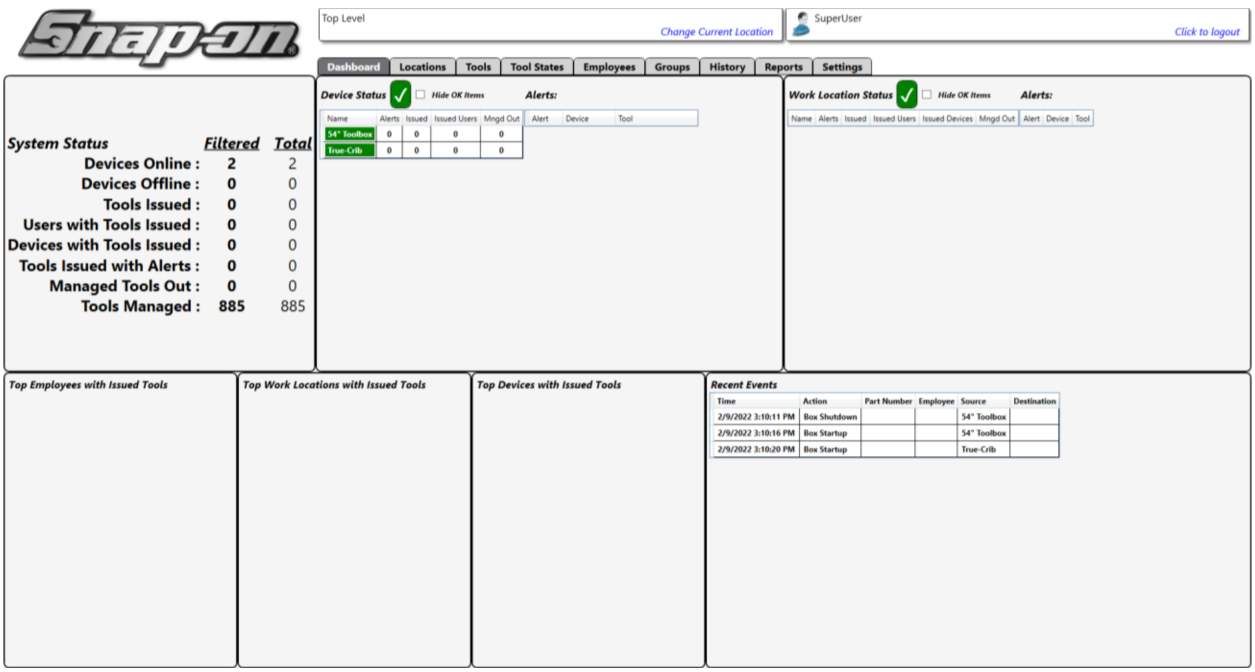


As you can see, our Location View has now changed; you can only see objects and devices within the Maintenance sub-location.



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™ Device's statuses and alerts.



Widgets

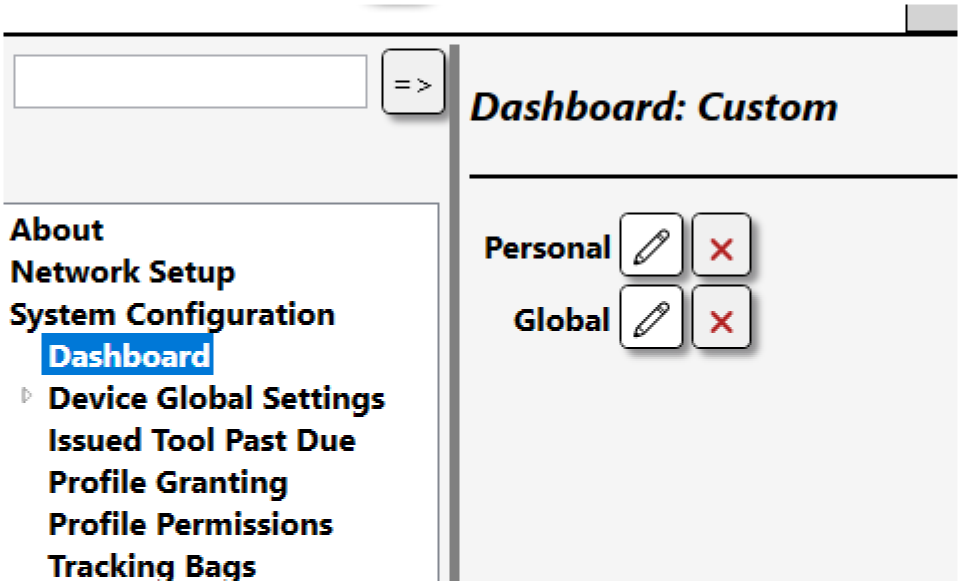
By default, the **Dashboard** displays seven widgets:

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™ 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™ 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**



There are two modes here, Personal and Global.

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

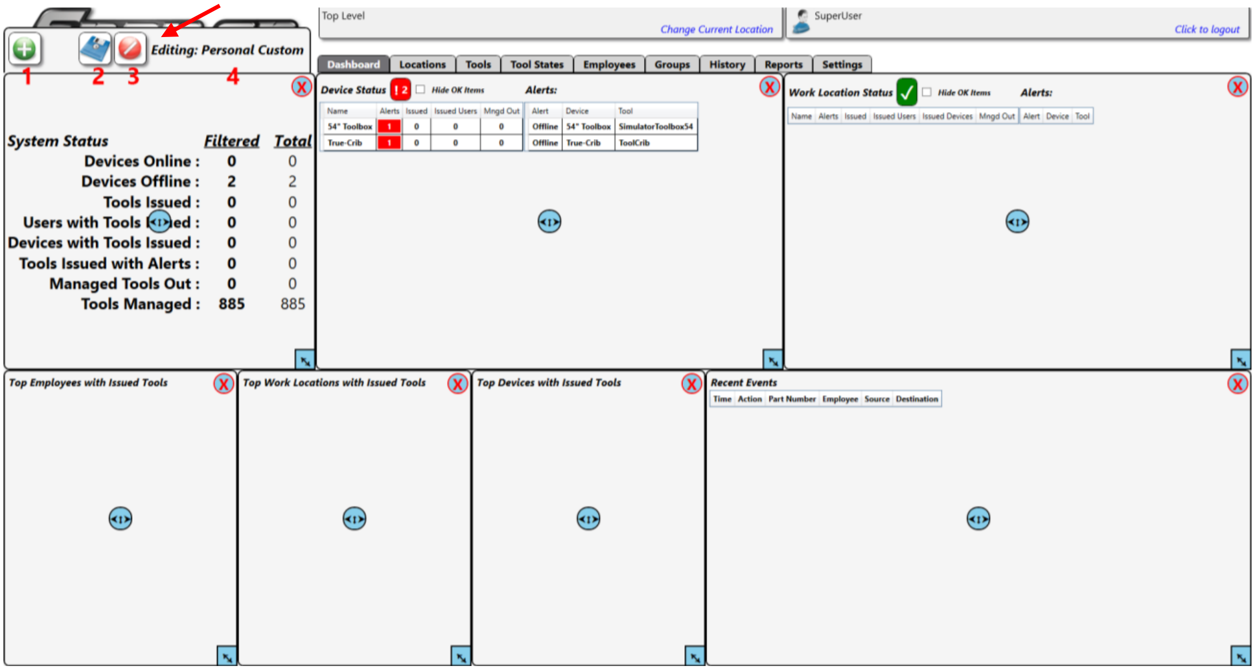
Global – Customize the Dashboard to a view that all users will see.

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**.

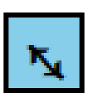
To clear a saved layout, click the button.

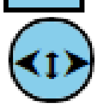
The **Dashboard Editor** controls are located in the top left-most corner of the screen.

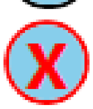


1. **Add a Widget** – This allows you to pick from the Widget library and add one to the screen.
2. **Save Current Layout** – saves current layout and exits the editor.
3. **Cancel Changes** – discards change and exits the editor.
4. **Current Layout** – displays the current mode you are editing.

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

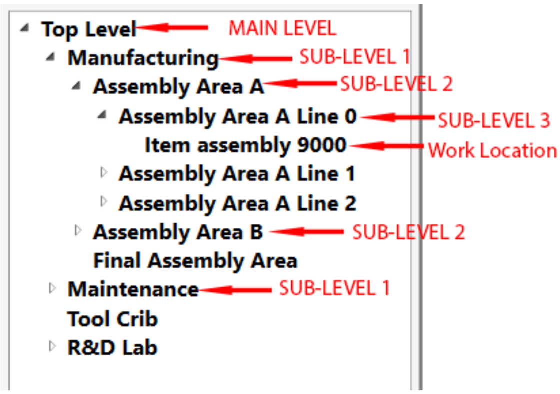
NOTE: The contents of the widgets are not customizable. You may only change the location of the widgets and the layout of the dashboard.

Locations

One of the most critical concepts in this guide is **Locations**. Everything within L5 Connect™ (**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™? 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.

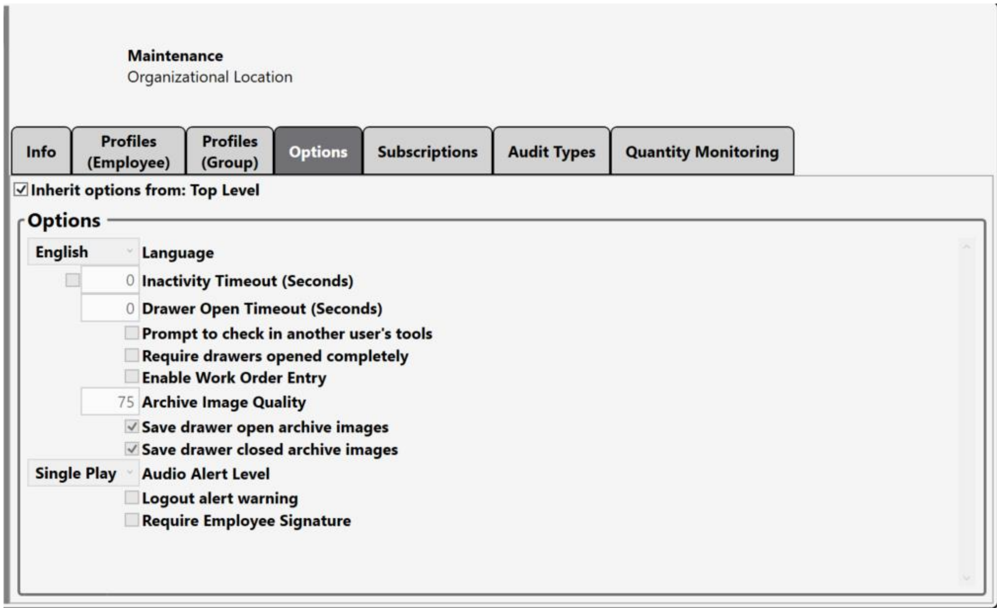
You can use the sub-levels to organize your employees and devices based on their primary work locations. For example, EmployeeA works on assembling a new part. The part is **Item assembly 9000**. You know that part will be on **Assembly Area A Line 0**. EmployeeA does not work on any other part. So, 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.

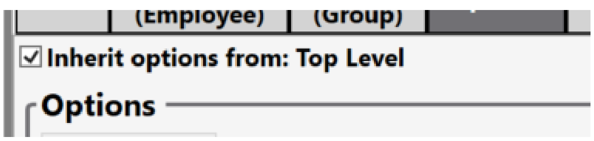
EmployeeB is currently training two new employees on **Assembly Area A Line 1** and **Line 2**. To give them access to resources in both locations, you must assign them to the **Parent Location**, the **Assembly Area A** location. At this Location, EmployeeB will gain access to resources in both **Line 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.



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.



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™ User Manuel.

Creating a Location

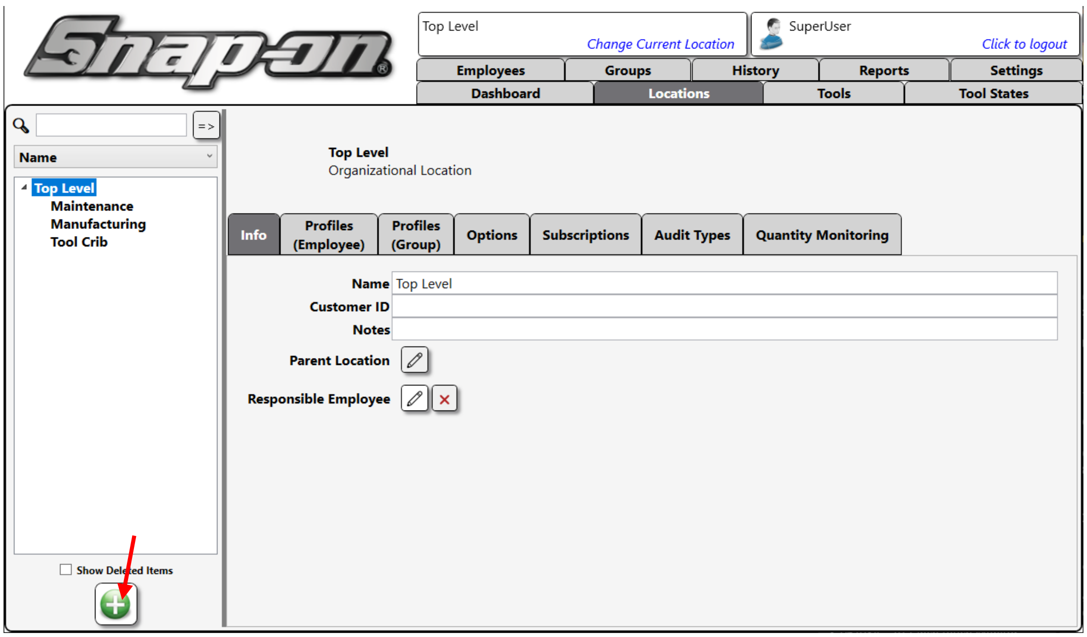
To build your organization structure in L5 Connect™, you must create location objects. These can be either:

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.

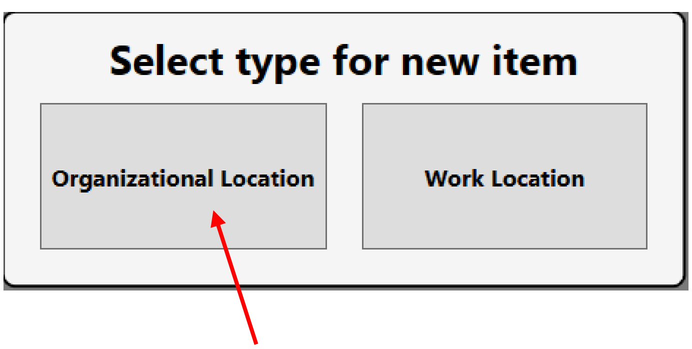
Work Location – This type represents where work occurs and where the tool is. It can be a bay or a specific object.

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.



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.

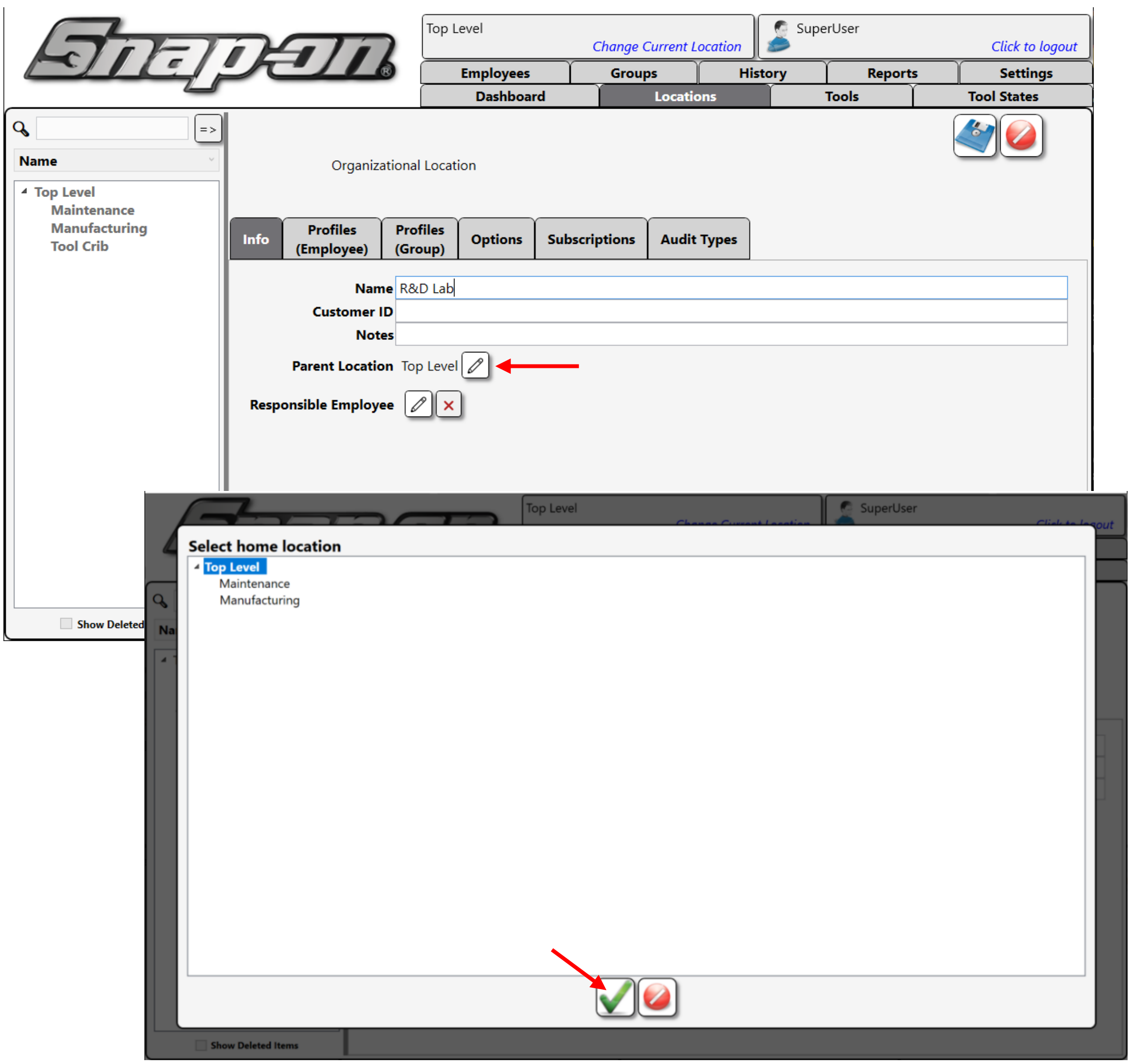
Customer ID – A unique identifier that can be any combination of numbers and letters. Locations cannot share the same Customer ID.

Notes – A custom note that describes the Location.

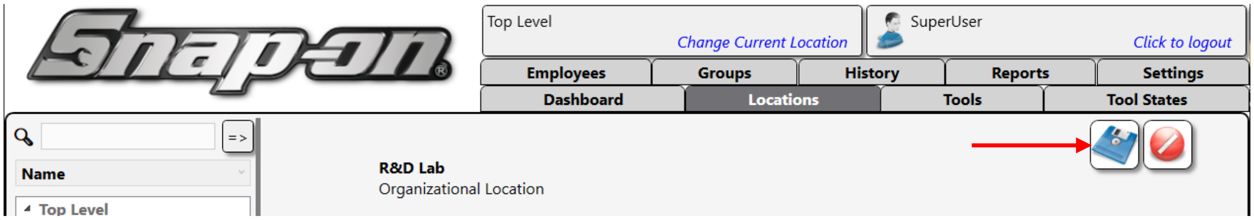
Parent Location – Designates which Location Object is the Parent of this Location.

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**.

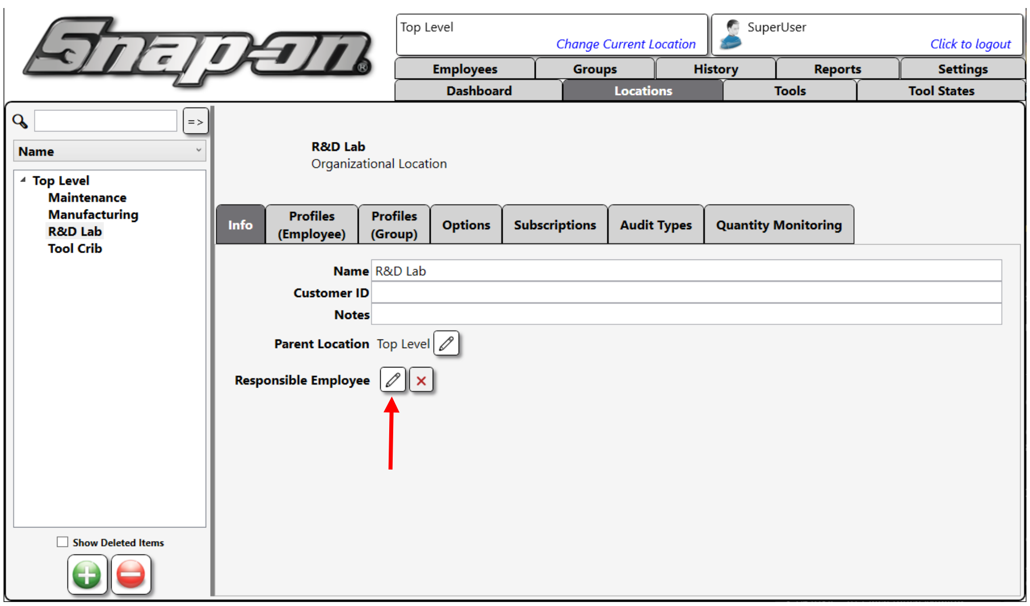


Once you have set the **Name** and **Parent Location**, click the blue Save icon at the top of the location properties screen to finish creating the Location.

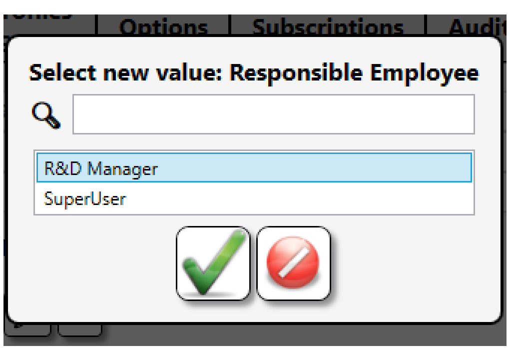


Now that you have created the location object set the **Responsible Employee** to **R&D Manager.** If the user doesn't exist, you will need to make it. (See Creating an Employee in the Employees section of this guide).

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

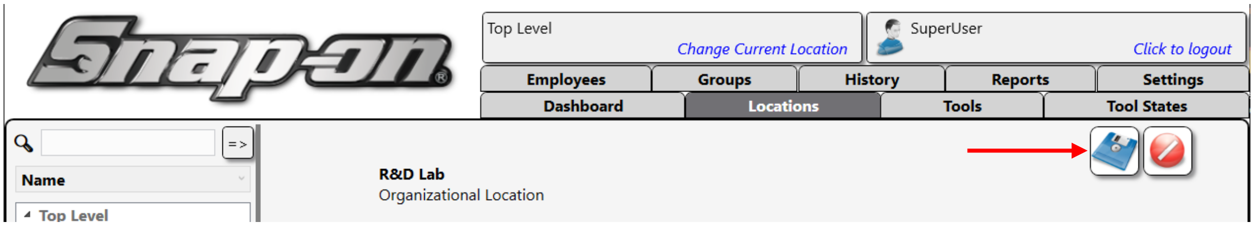


Click on R&D Manager to select it, and then click on the ✓ check button to set it as the responsible Employee.

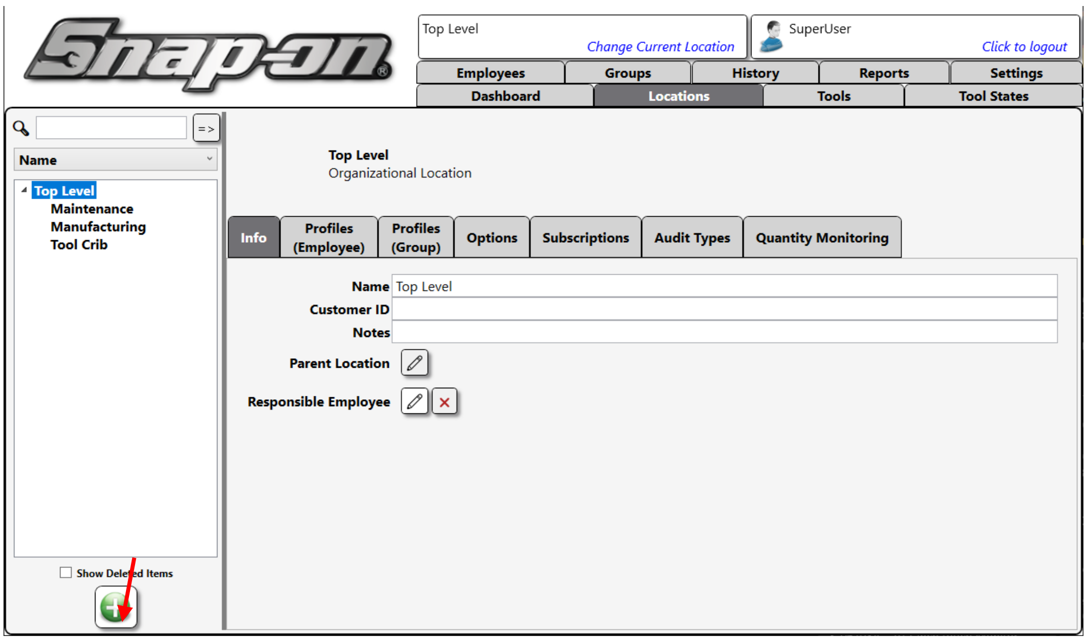


NOTE: You will only see employees who have a profile assigned to the location or it's parent. More information on how to assign a profile to an employee can be found in the Profiles section of this guide.

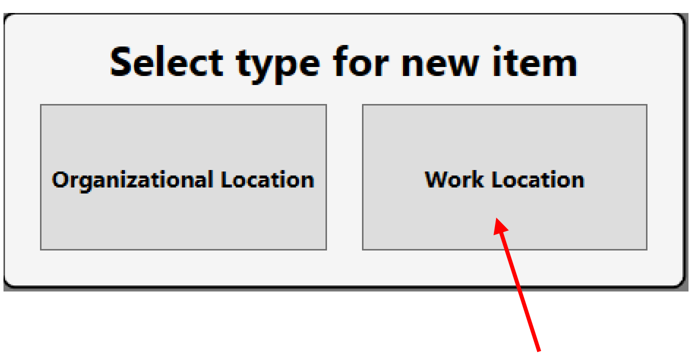
Once again, click on the blue Save button in the upper right-hand corner of the screen to apply your changes.



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.



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.

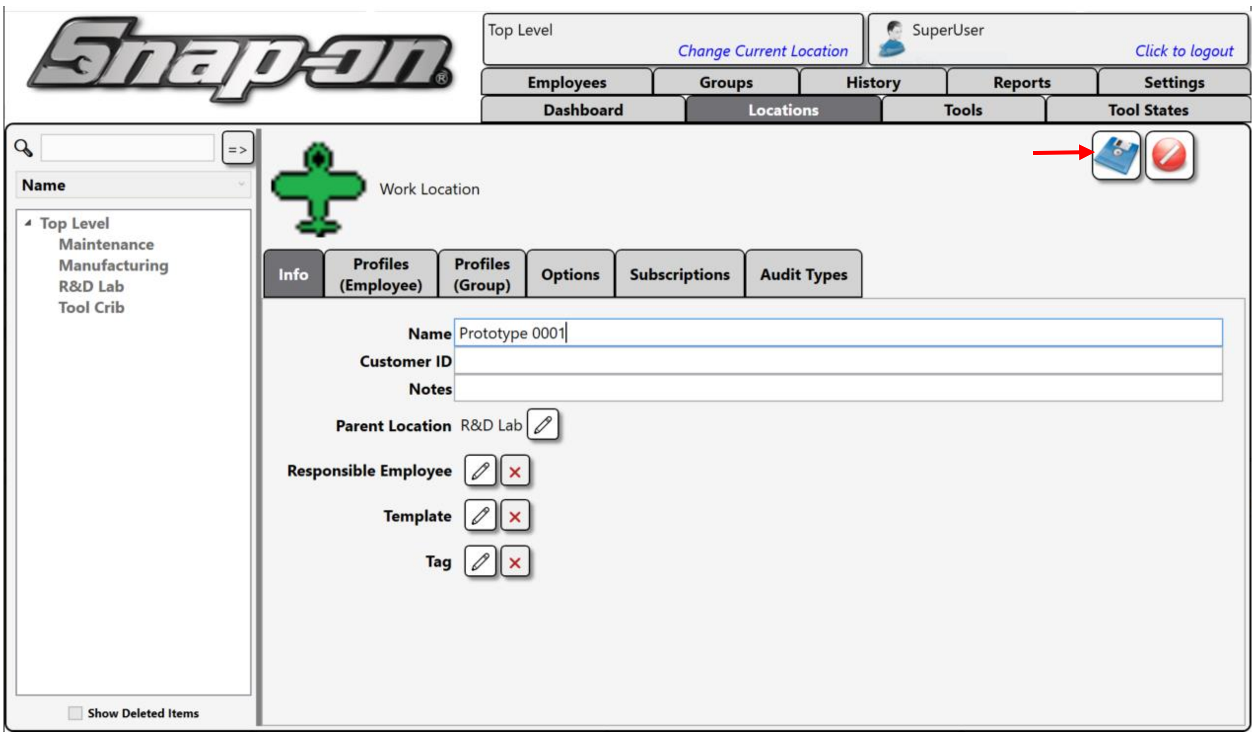
NOTE: More information on templates can be found in the Work Location Templates section of this guide.

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).

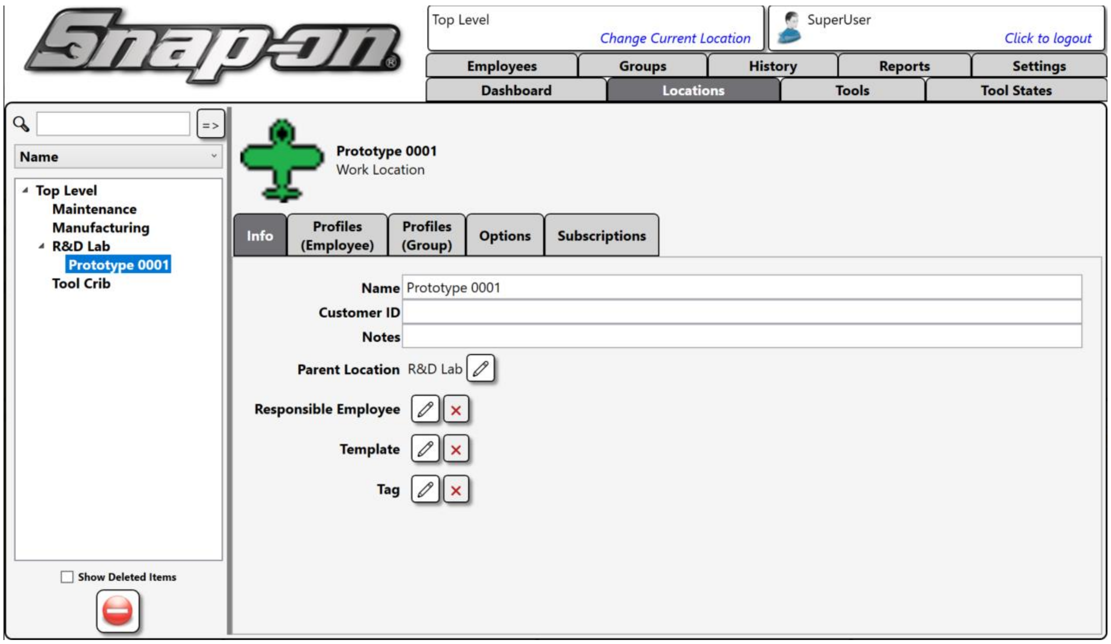
Once all the desired attributes are set, click on the Blue save icon in the upper right. The Work Location is now created. You will then see the Work Location placed under the R&D Lab Org location.



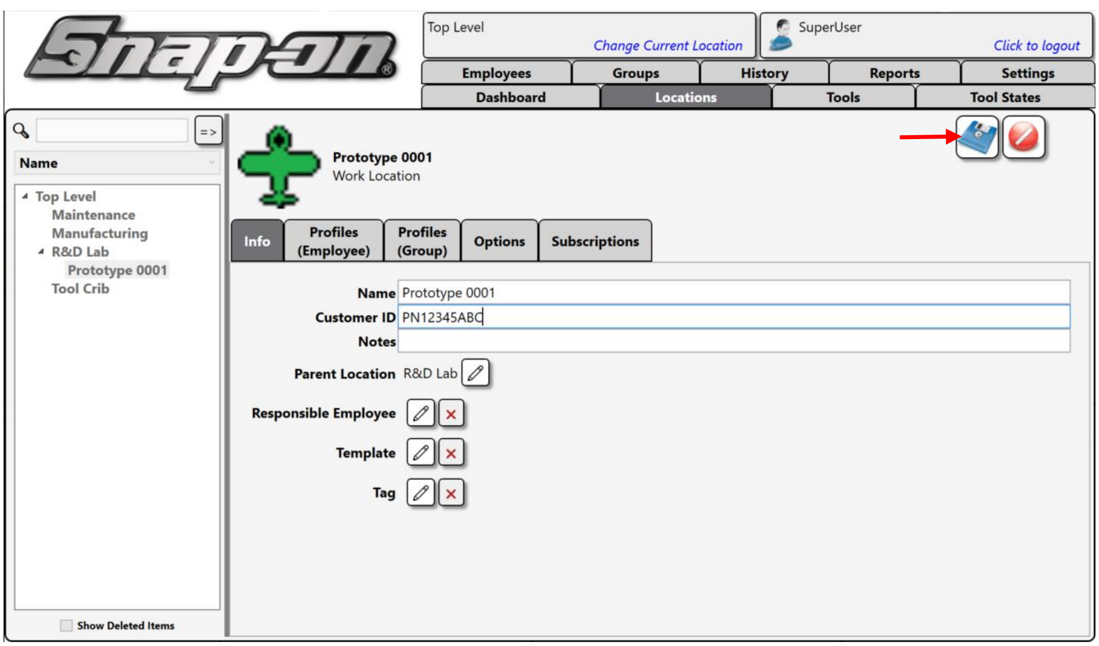
Editing a Location

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



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

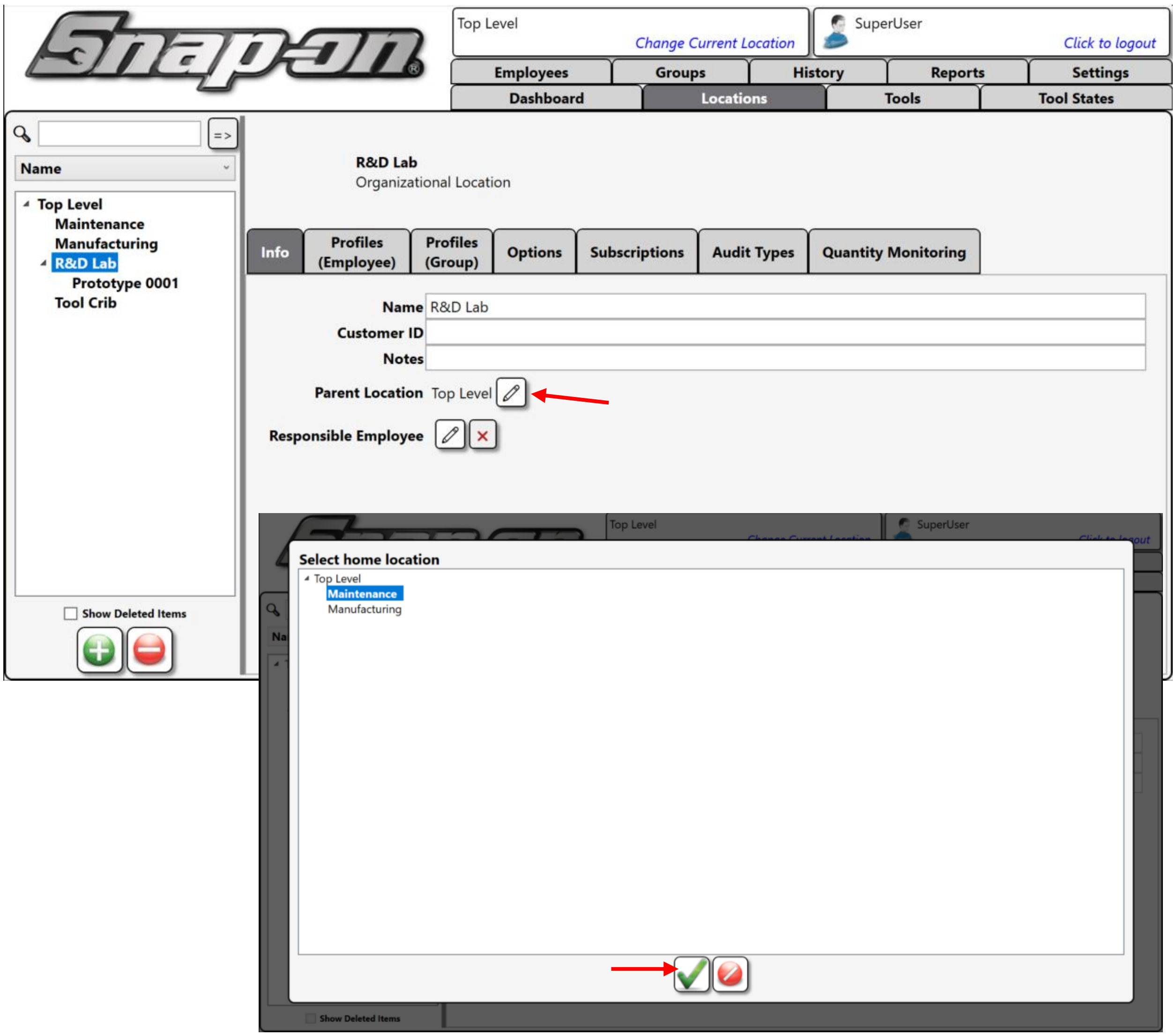


Moving a Location

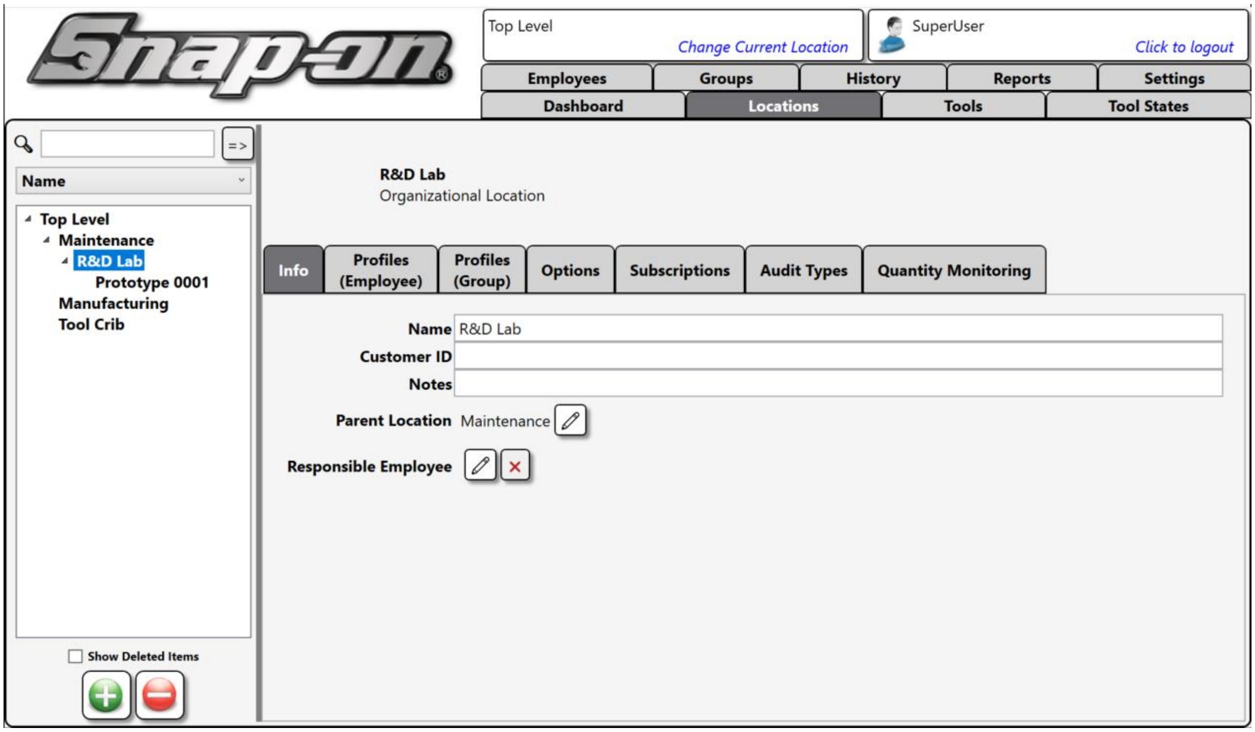
Sometimes the layout of your company may change. L5 Connect™ allows you to modify your Location Tree when these changes are needed. For example, a company needs to reclaim some space for another project and decides to move their R&D Lab to Maintenance Bay. For this example, you would move the **R&D Lab**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



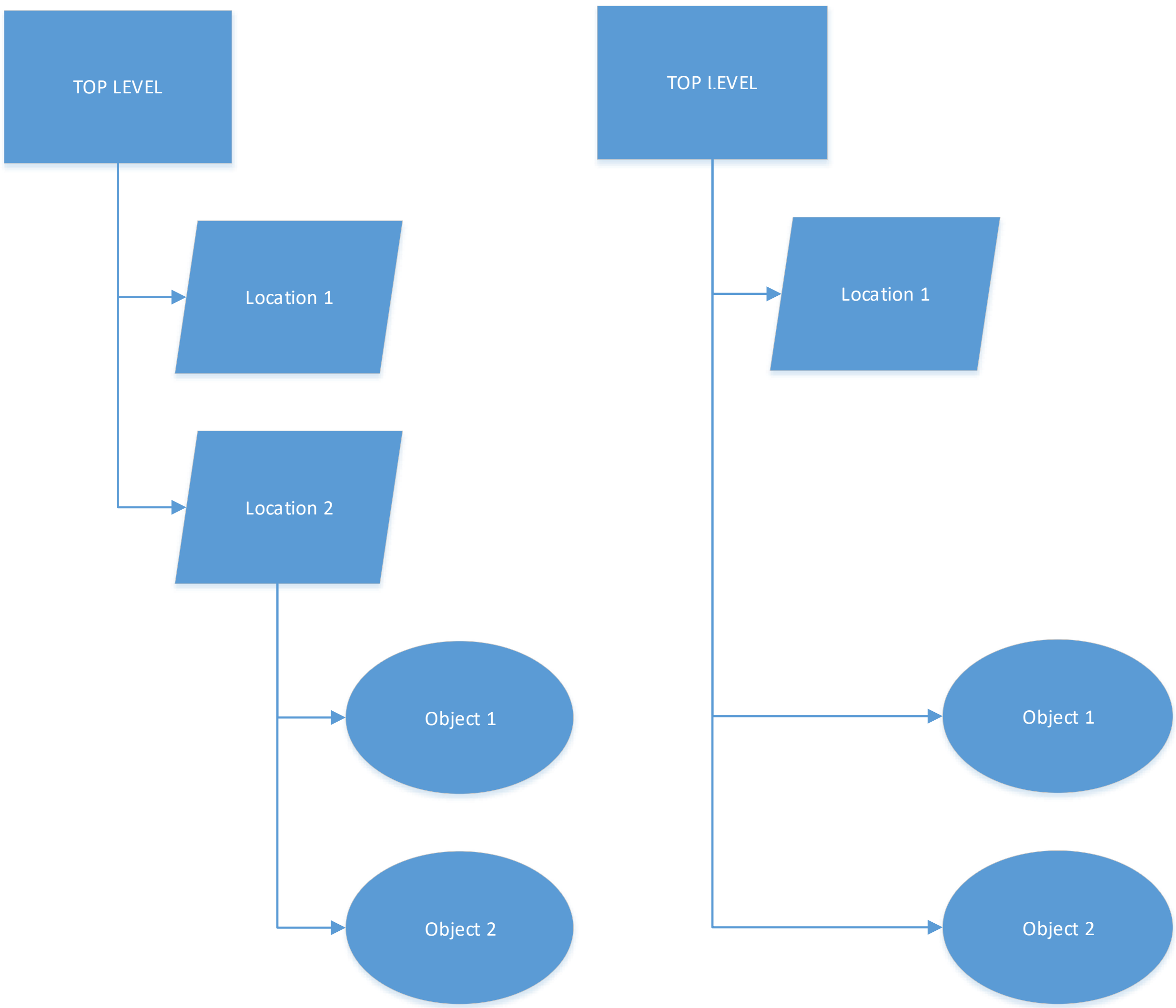
Once you save the change, the location object **R&D Lab** will move to its new Location underneath **Maintenance**.


Top Level
Change Current Location
SuperUser
Click to logout
Employees
Groups
History
Reports
Settings
Dashboard
Locations
Tools
Tool States
Name
Top Level
Maintenance
R&D Lab
Prototype 0001
Manufacturing
Tool Crib
Show Deleted Items
R&D Lab
Organizational Location
Info
Profiles (Employee)
Profiles (Group)
Options
Subscriptions
Audit Types
Quantity Monitoring
Name
R&D Lab
Customer ID
Notes
Parent Location
Maintenance
Responsible Employee

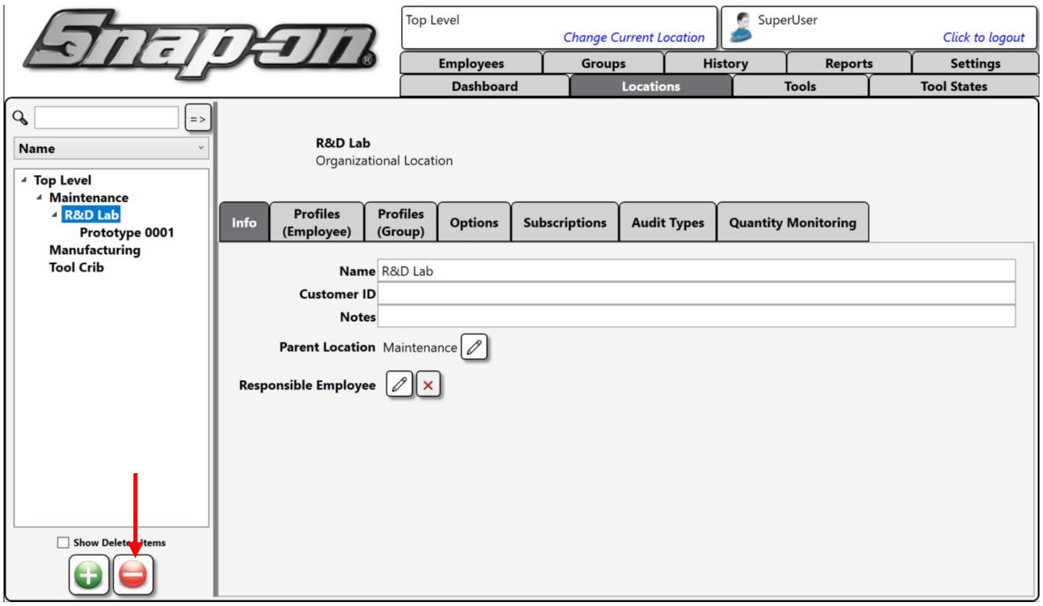
Deleting a Location

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

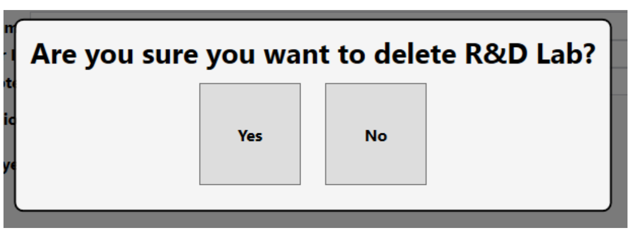
When deleting a Location Object, all child objects will be moved up one level and become child objects of deleted object's parent. For example, in the figure below, when deleting **Location 2**. **Object 1** and **Object 2** become child objects of TOP LEVEL.



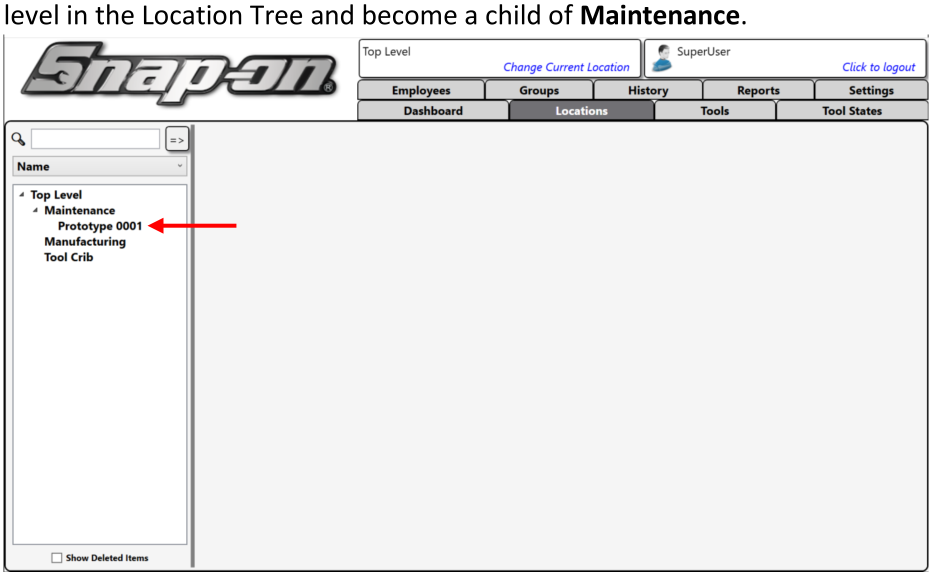
To Delete a Location, select it from the location tree. Then click on the Red Delete button on the lower-left corner in the locations tab.



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**.



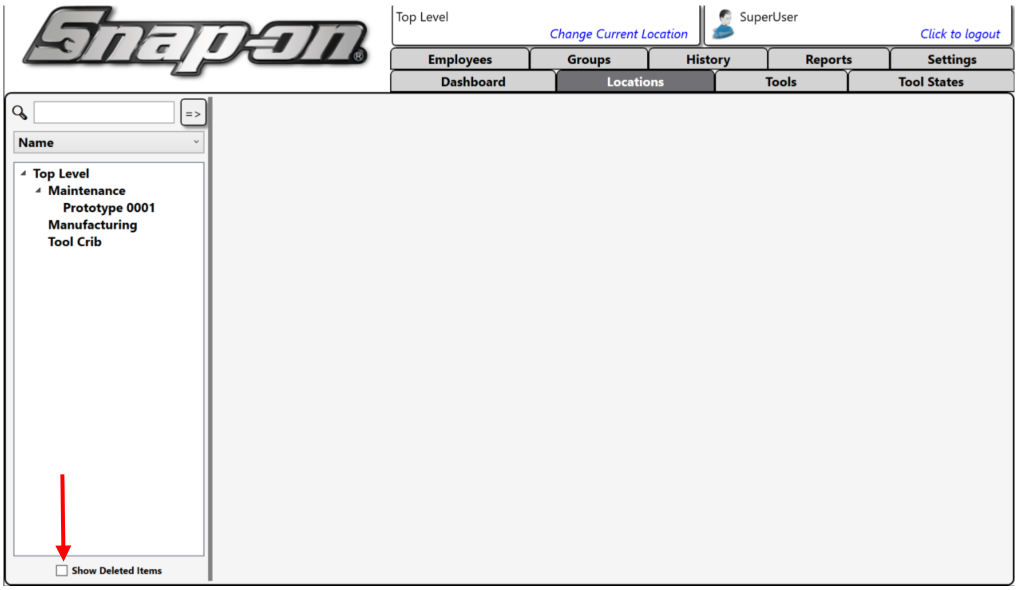
Once you click **Yes**, the Location **R&D Lab** will be removed, and **Prototype 0001** will be moved up one level in the Location Tree and become a child of **Maintenance**.



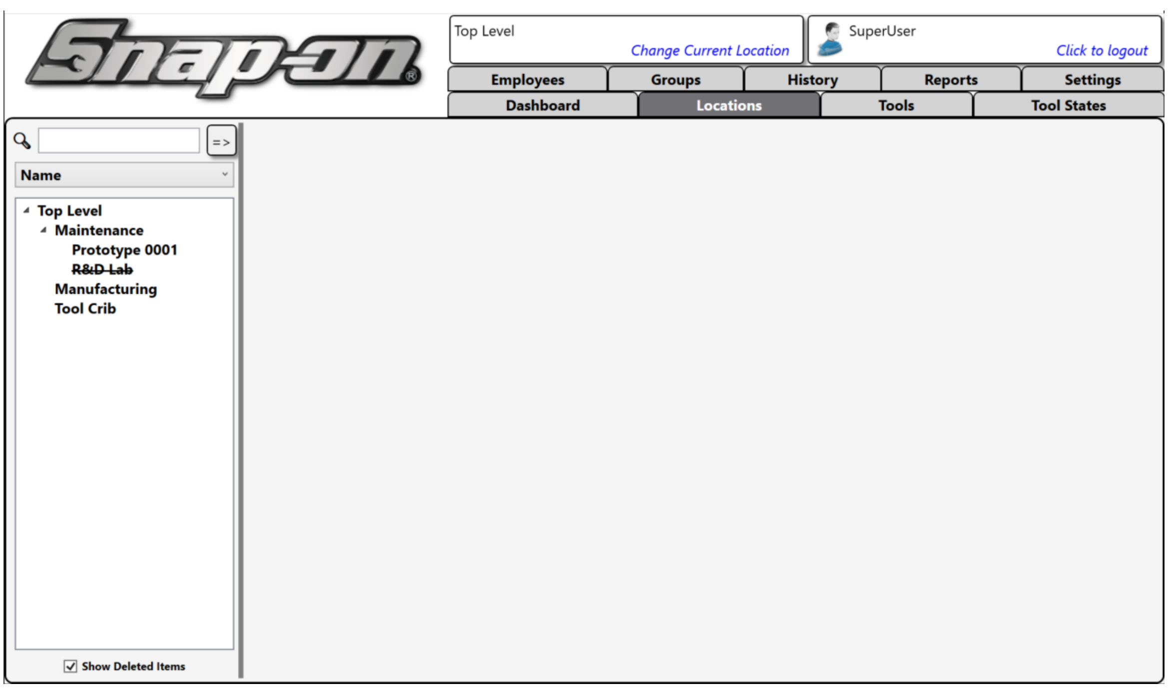
Restoring a Location

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.

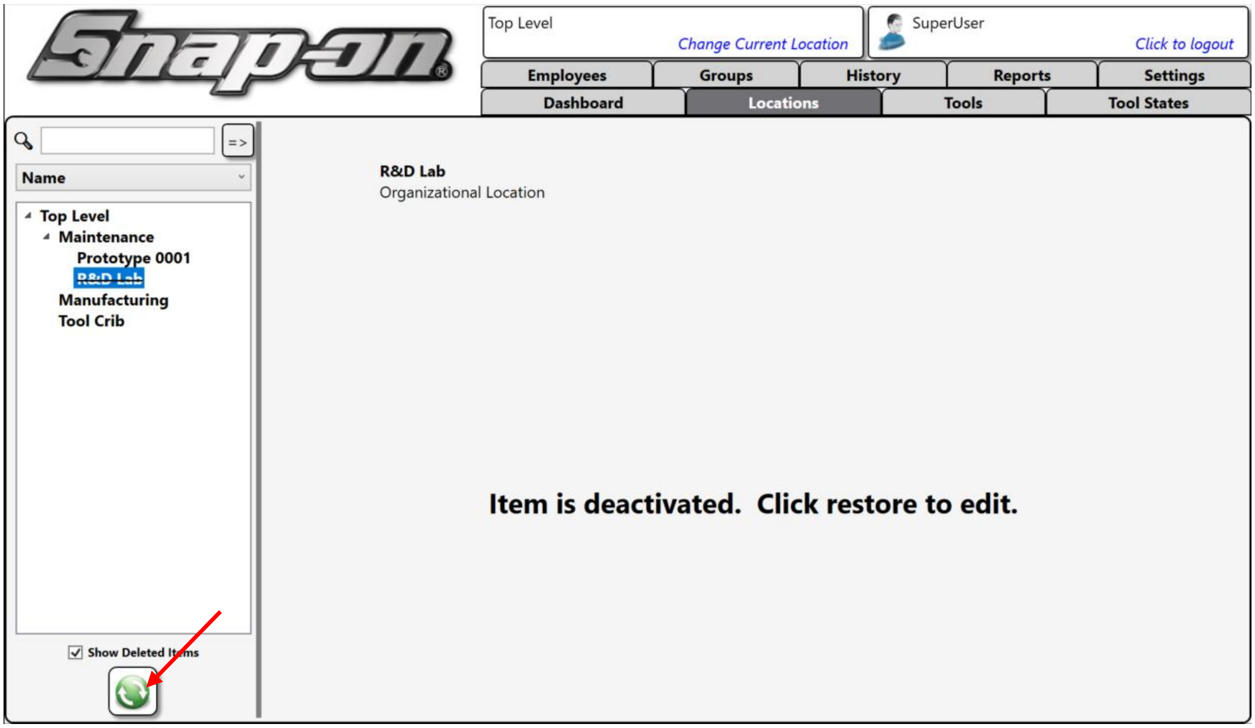
Click on the **Show Deleted Items** checkbox at the bottom of the Location Tree to display all deleted location objects.

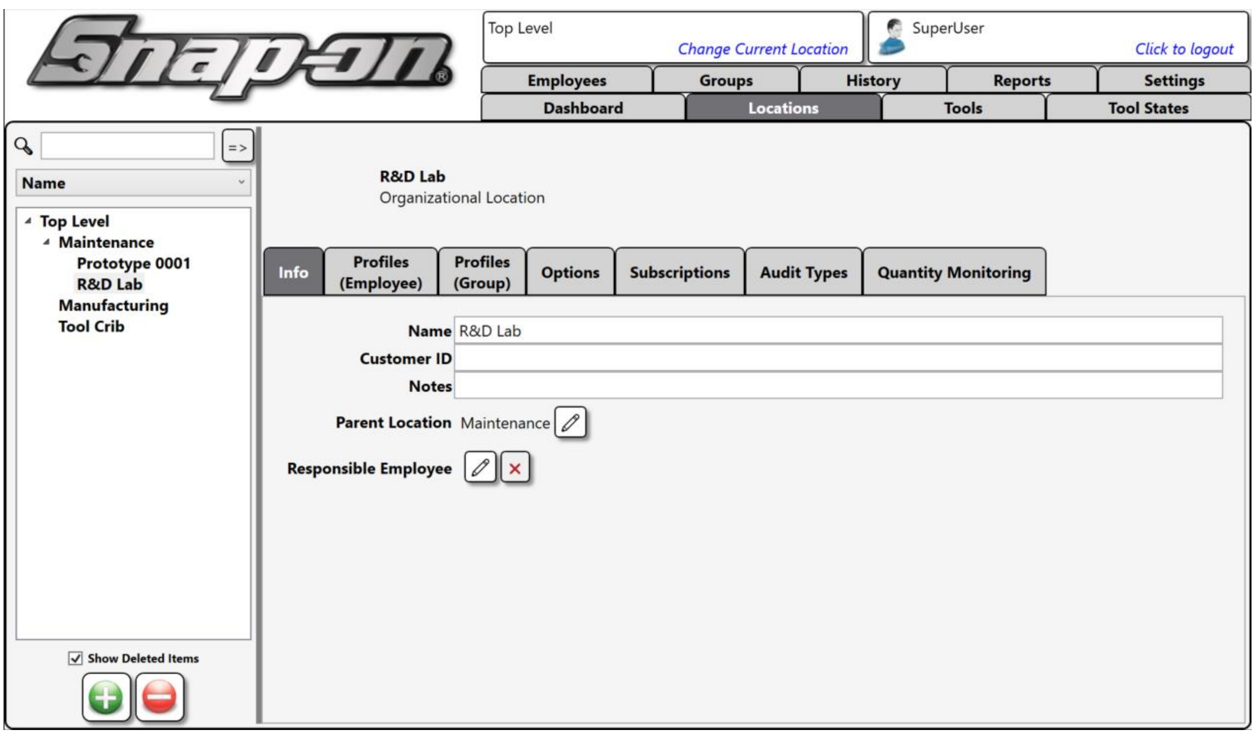


Now you can see the deleted **R&D LAB** and its position in the Location Tree when deleted. All deleted location objects are listed with a ——— through the name.

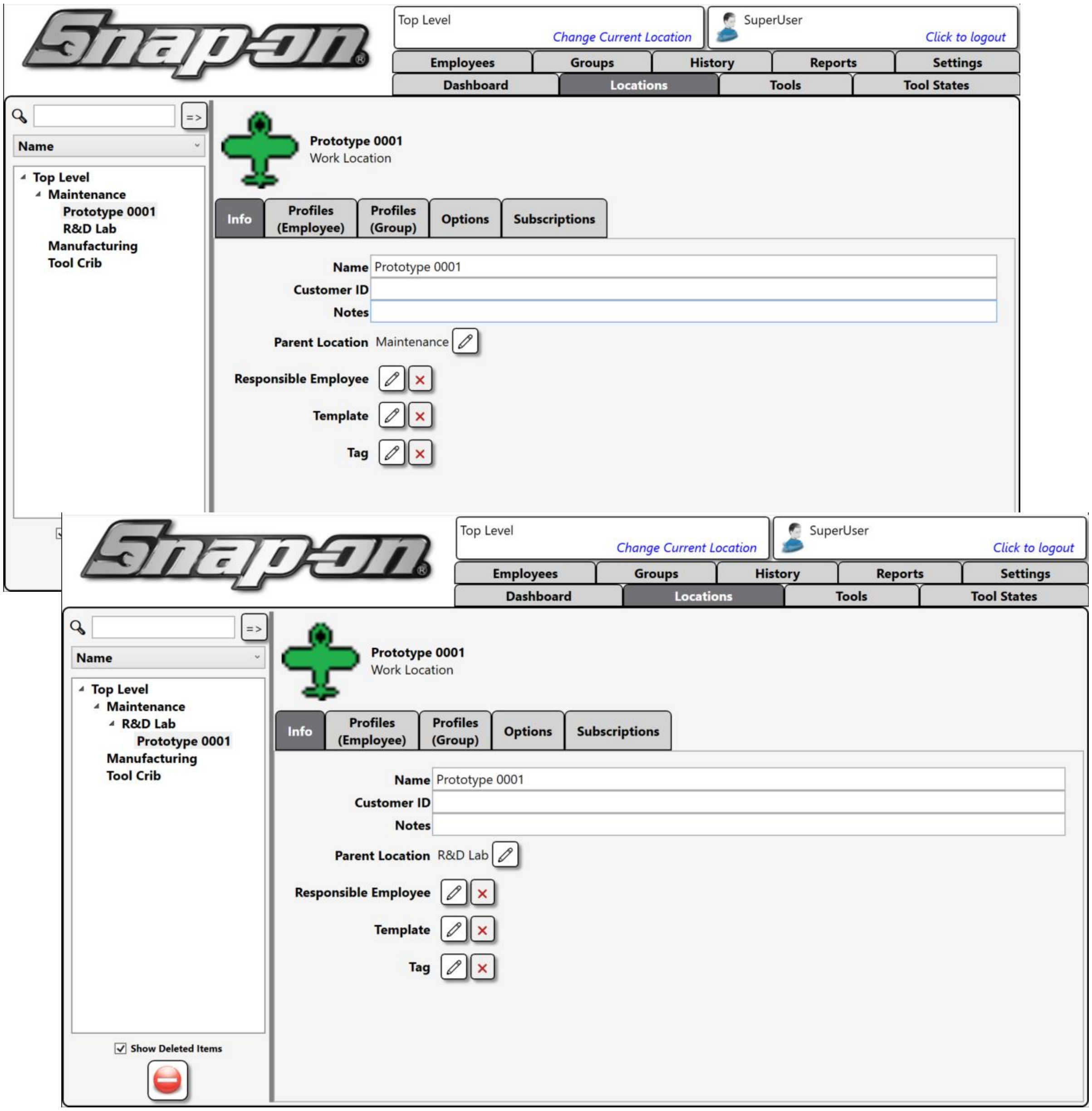


Once selected, click on the button to restore the Location. Next, you can uncheck the **Show Deleted Items** checkbox.





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**.



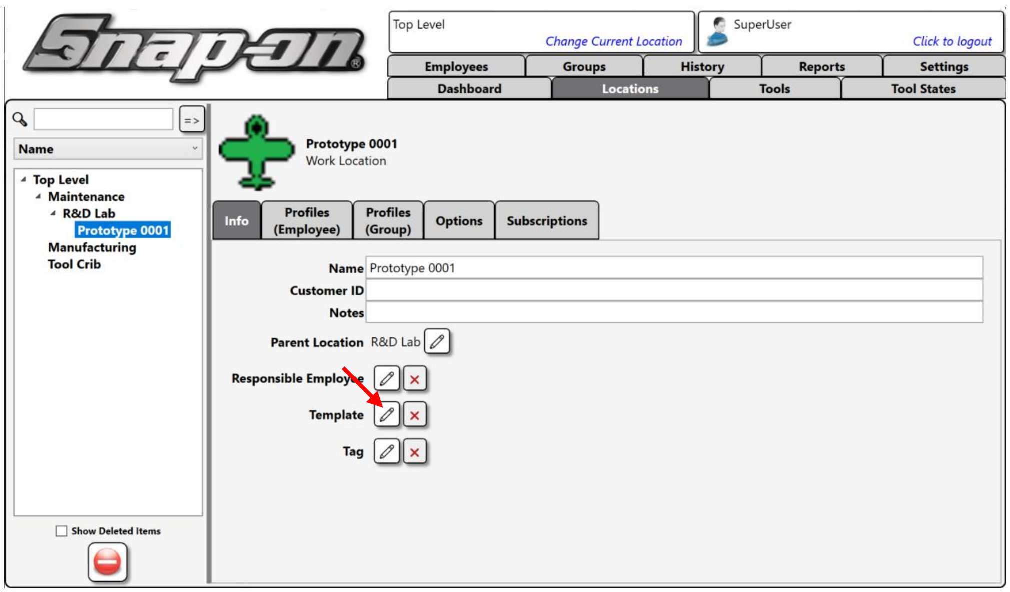
NOTE: When restoring a location, all Profiles and Permissions are cleared when it was deleted and must be reset.

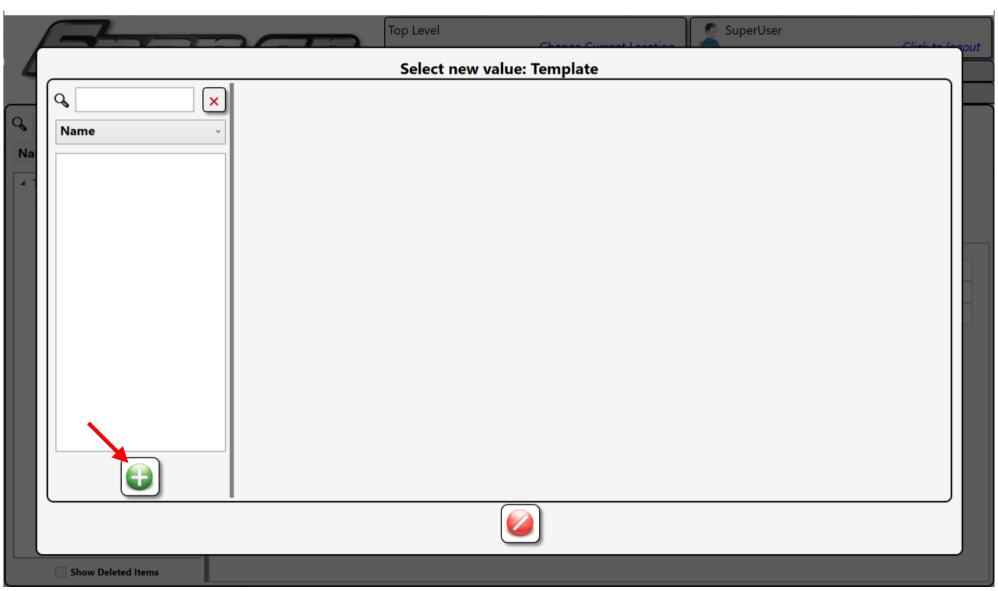
Work Location Templates

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.

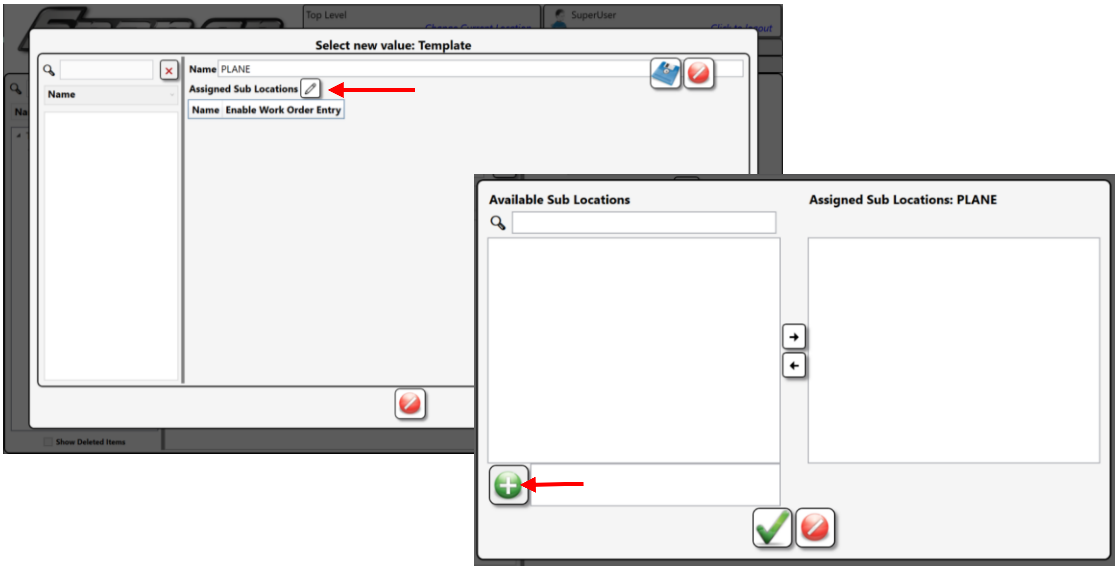
All Templates are global and, once created, can be used with any Work Location in the system. You can view all Work Location Templates from the Settings tab -> System Configuration Menu.

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





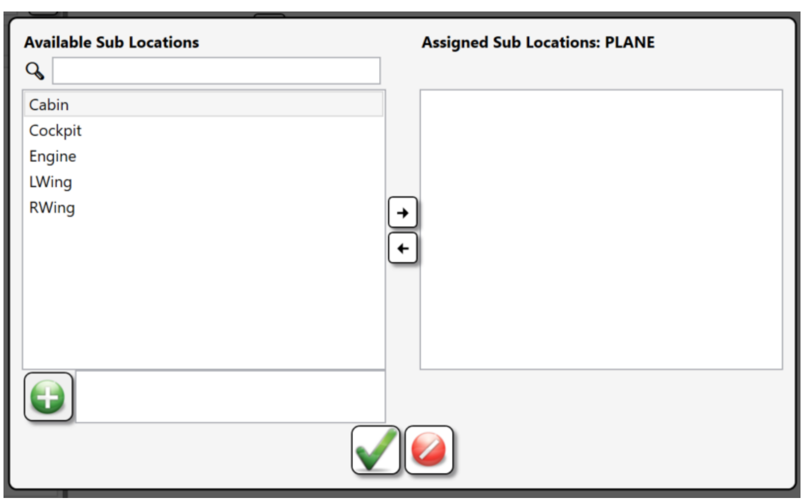
You will then need to name the Template and assign Sub-Locations to it. Type PLANE in the name field, then click on the button near **Assigned Sub Locations. When you click on this button, you will see the sub-locations screen.** If you do not have any sub-locations, you will need to create them. Like Templates, Sub-Locations are global and can be used in multiple templates.



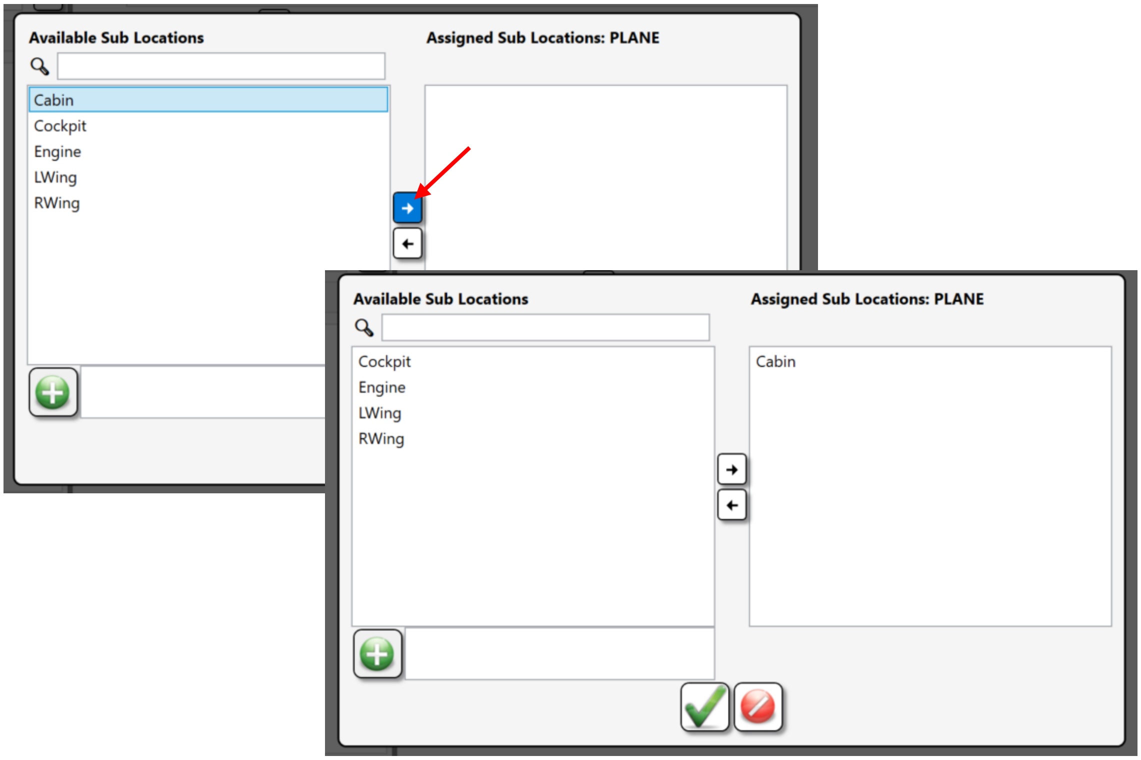
To create a sub-location, Type the name of the Sub-Location and press the button. This button will add it to the list. For the **PLANE** Template, you will add the following sub-locations:

- Cockpit
- RWing
- LWing
- Engine
- Cabin

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

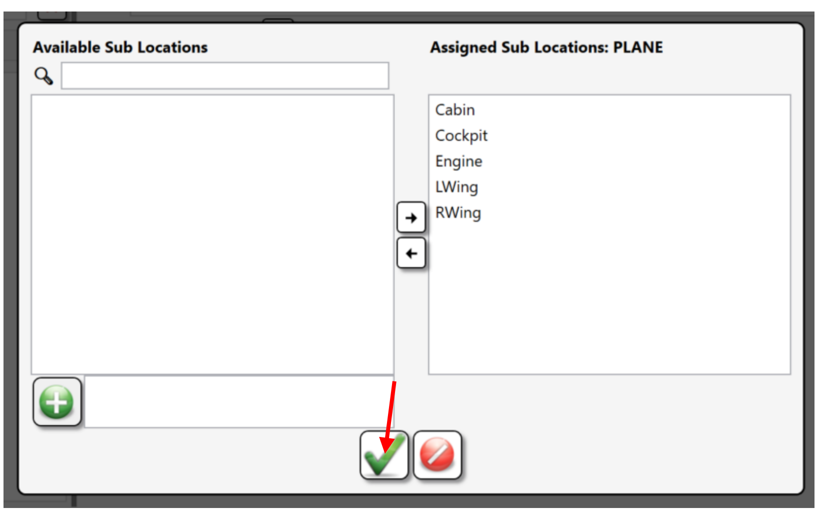


To assign a Sub-Location to the Template, select it from the list, then click the -> button.

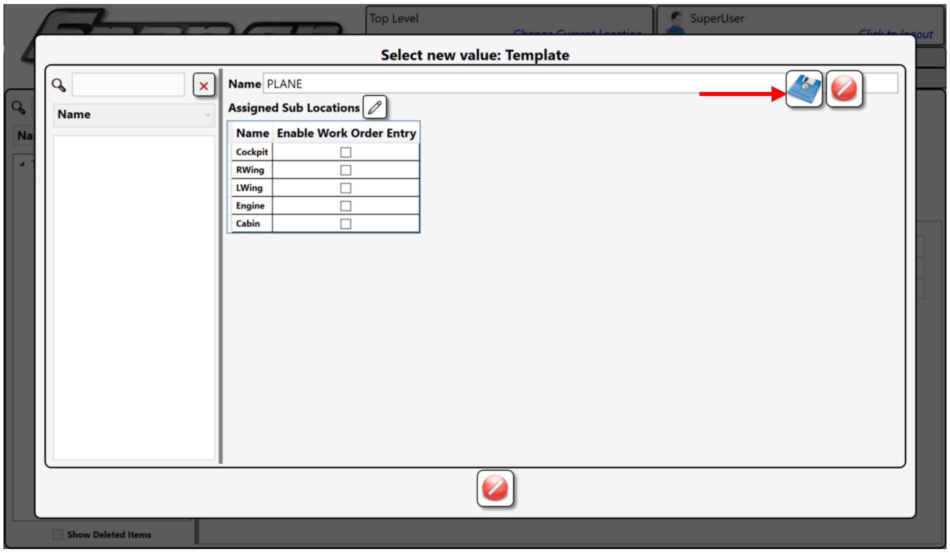


Again, all Sub-Locations are available for assignment throughout the system. You can also assign it to several different Templates simultaneously. Set all of the Sub-Locations to the template **PLANE**. Remember, when assigning sub-locations, you do not need to assign all of them to a Template. Only assign what you need.

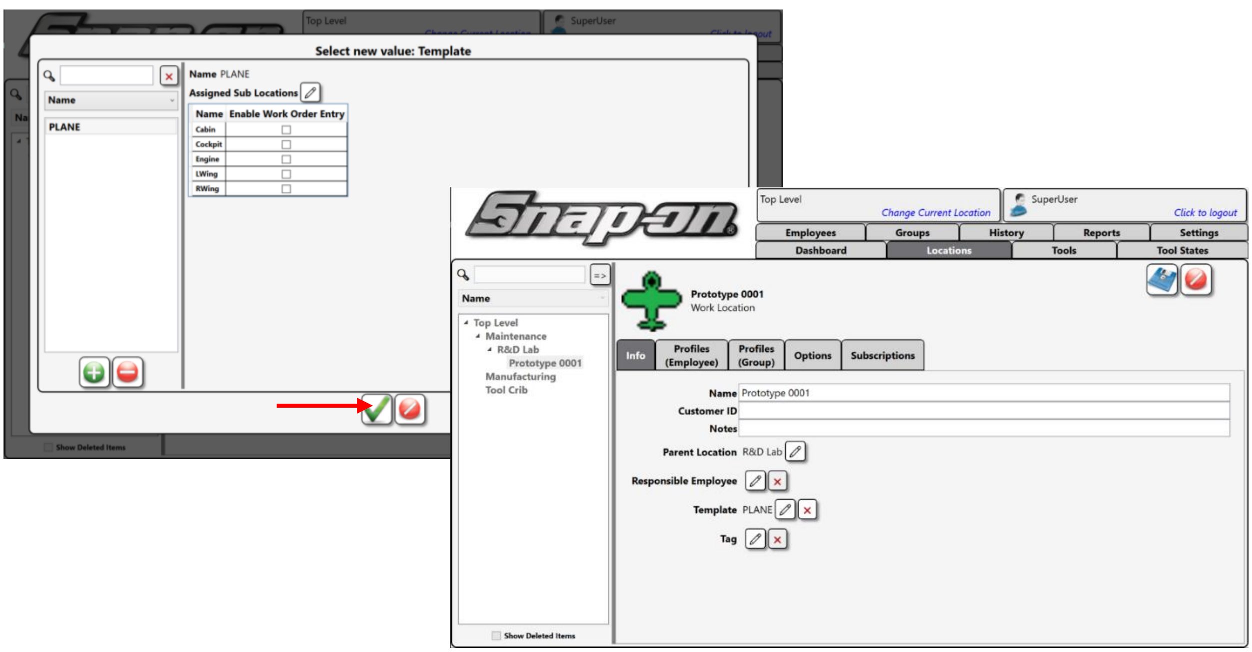
Click the ✓ button when you have finished assigning all of the sub-locations.



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.



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



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

Employees

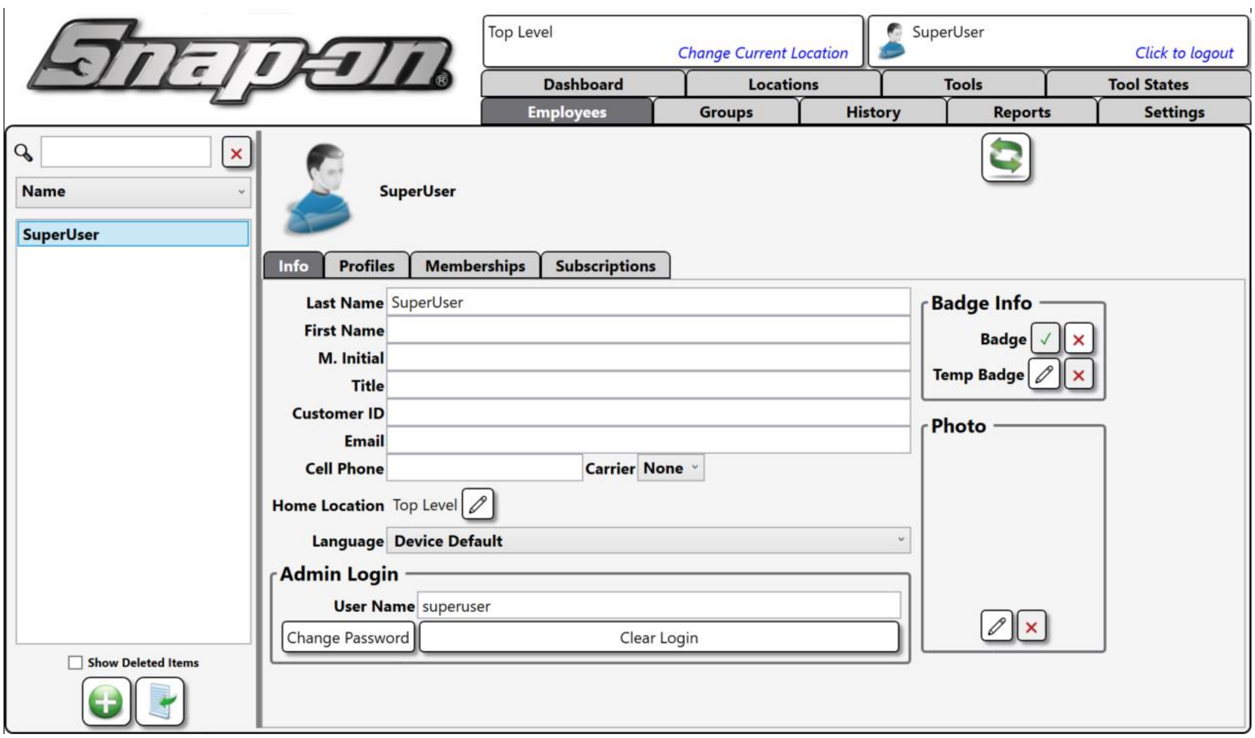
Employees are the user accounts used to control the access and administration of L5 Connect™. Each Employee should have a separate account within the system that is not shared. This method allows for more precise auditing of the system. An employee account can either be a standard account or an admin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

STANDARD ACCOUNT – Is used for regular access to the L5 Connect™ devices. Has no access to the Administrative Functions on any device and cannot log into the L5 Connect™ 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.



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.

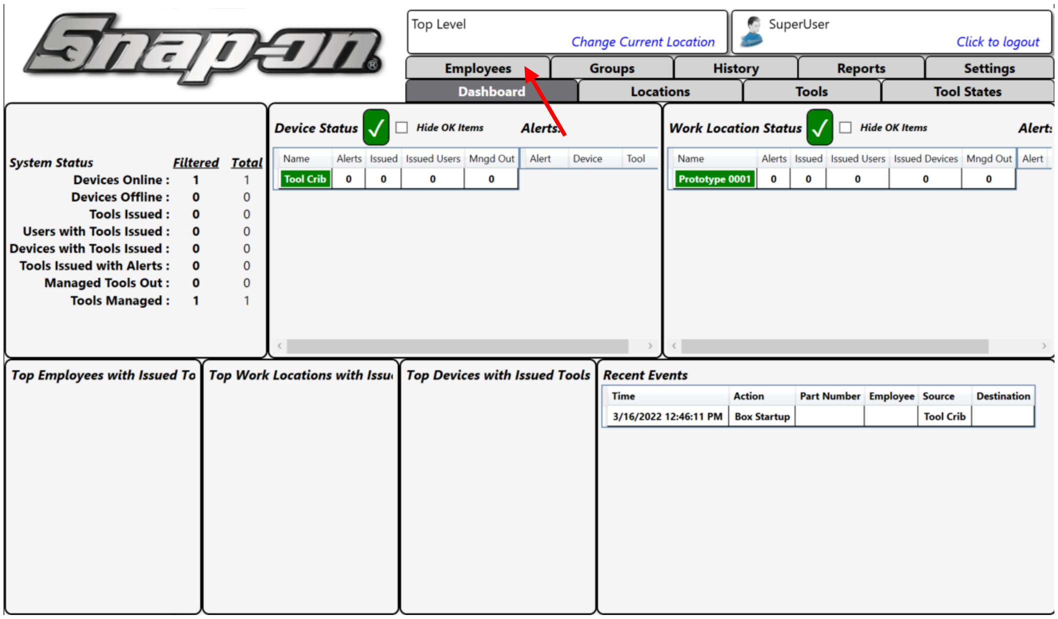
Temp Badge – With an RFID badge scanner, assign a badge that will expire based on your set time and date.

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.

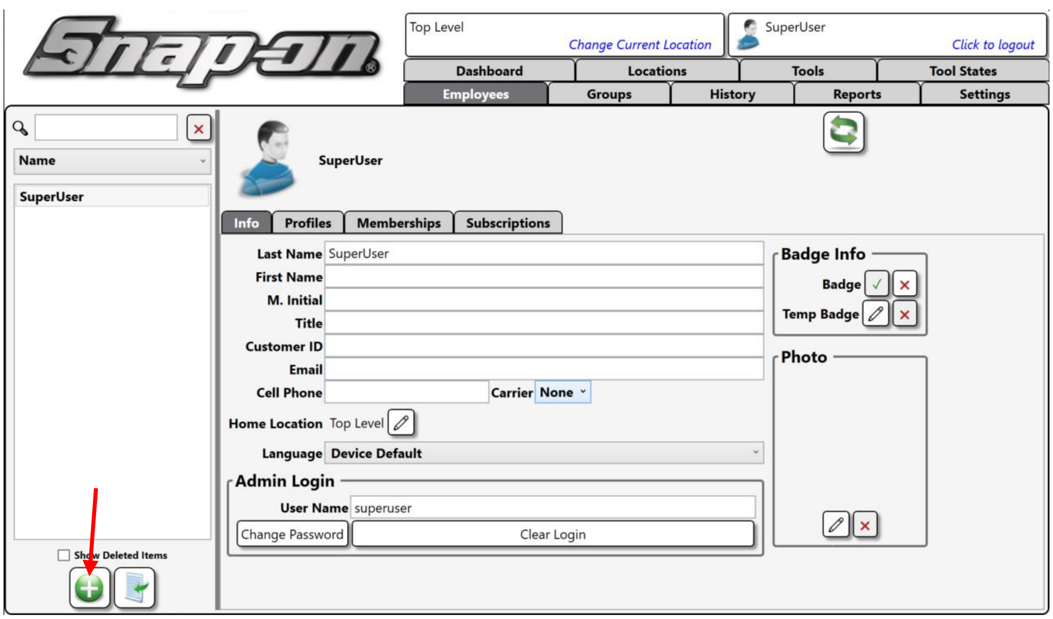
Creating an Employee

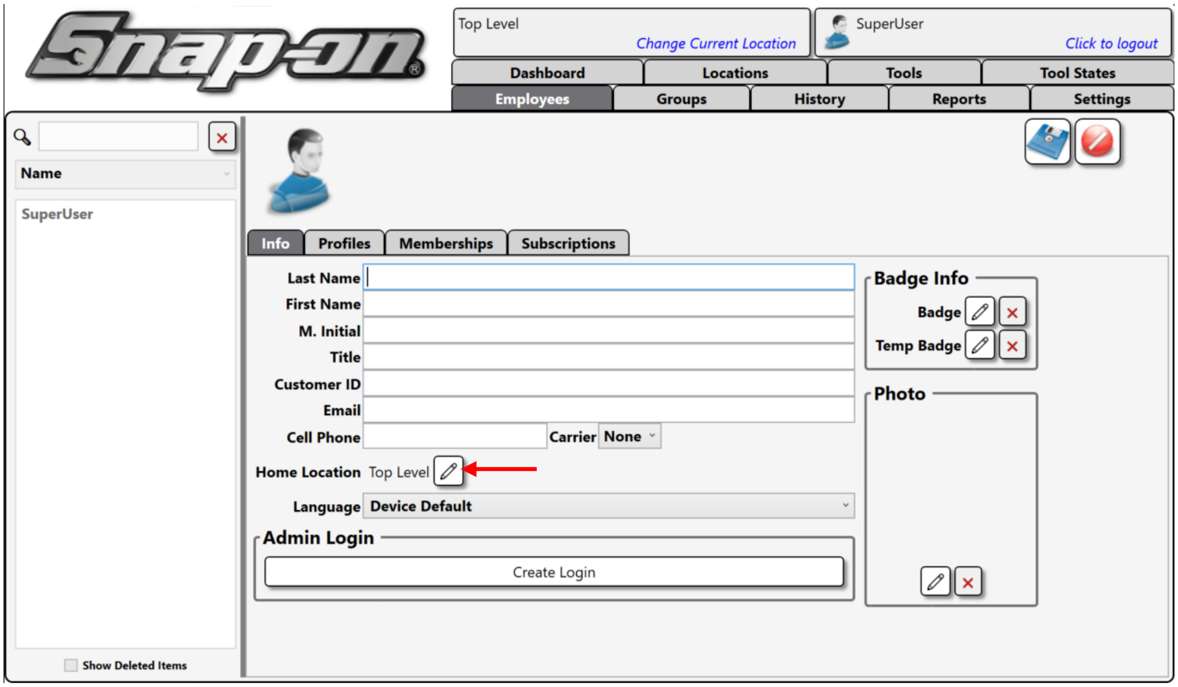
Creating an employee requires that the user account creating the new Employee is an admin and that they have permission to add employees to the location they are adding them.

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.



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

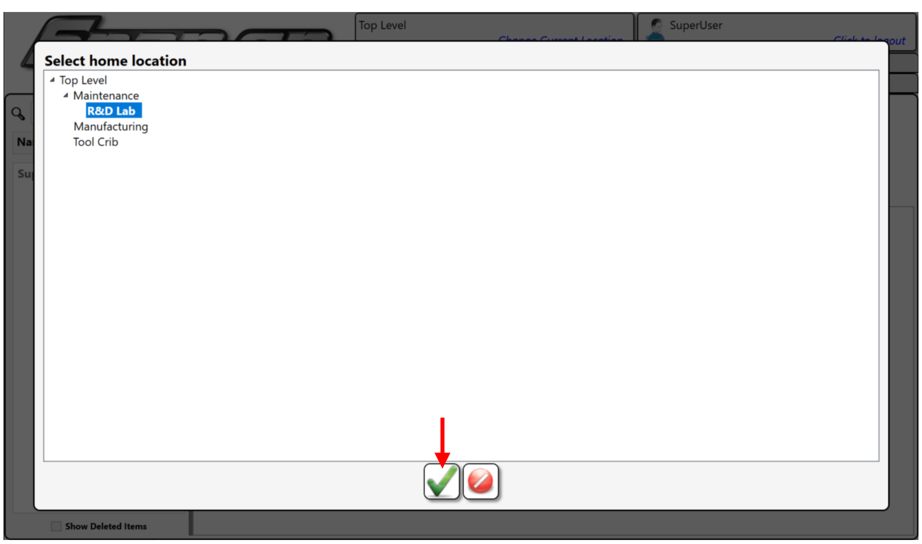




You will need to fill out all the attributes for the user from here. The following is some sample information you can use to practice.

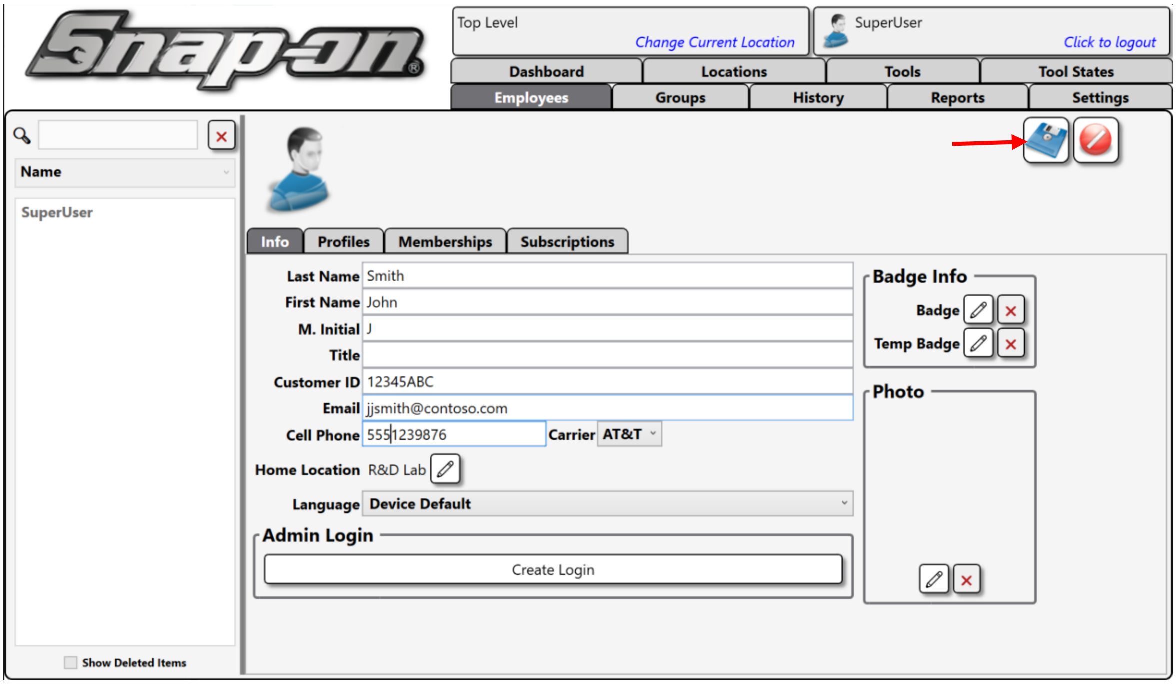
The Employee's name is **John J. Smith**. He has no title. His Employee ID is **12345ABC**. He has the e-mail address of **jjsmith@contoso.com**. His cellphone is **555-123-9876,** and **AT&T** is his carrier. He uses the standard system language and does not need administrative access. The Employee's primary work location is R&D Lab.

To set his **Home Location**, click the ✏ icon. This button will bring up the Location select screen. Select R&D Lab, then click on the ✓ button.

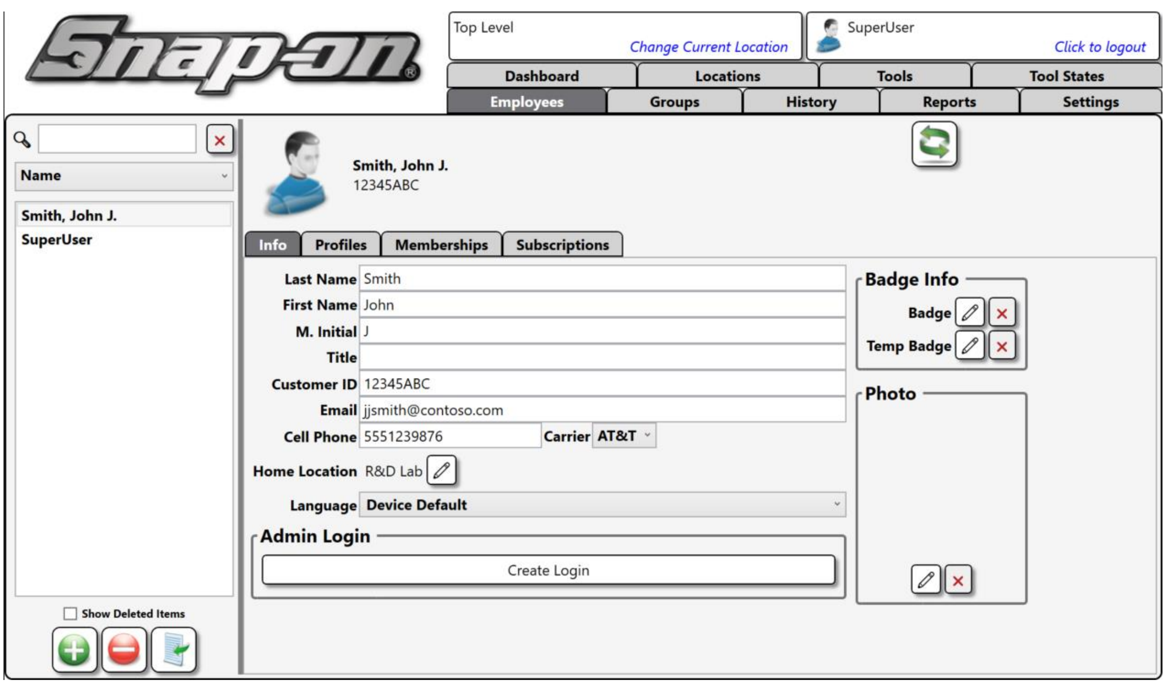


NOTE: The Home Location will default to the Current Location the Admin is working in. Please see the Locations section of this guide for more information.

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.



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

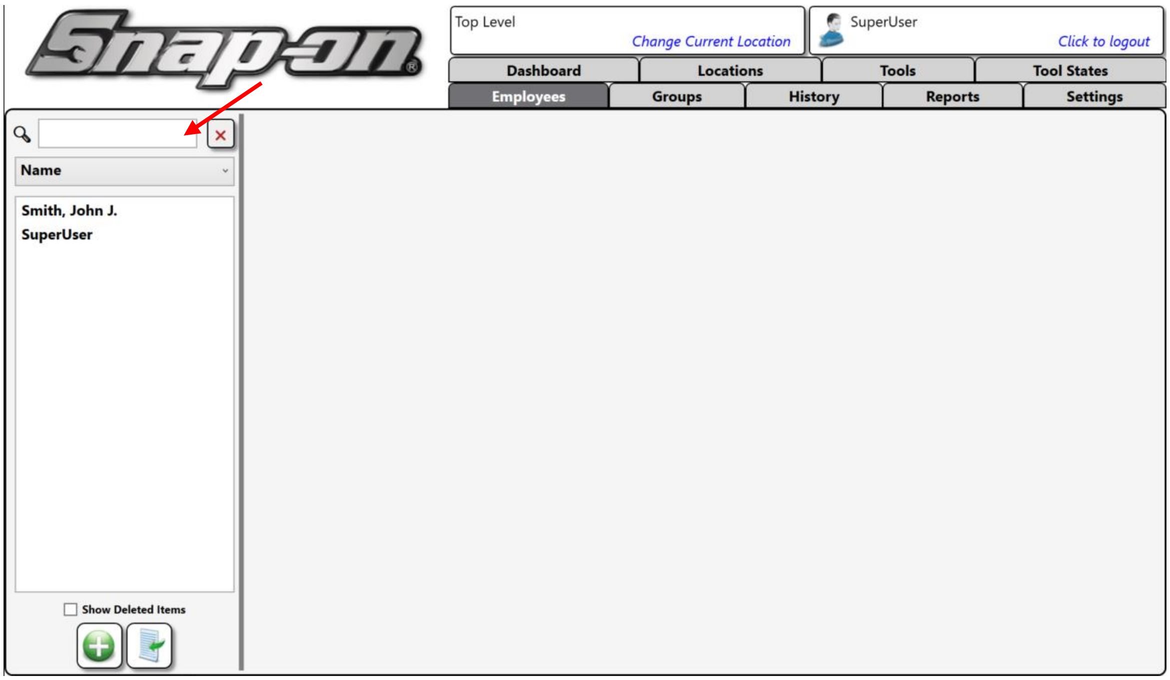


Searching for an Employee

If you have many employees in the system, L5 Connect™ 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.

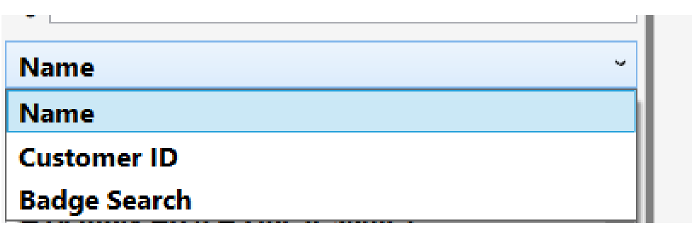


Below the Search Bar is a pull-down. This pull-down will allow you to search for an employee using three different methods. These methods are

Name – The name of the Employee can use first and last name to filter.

Customer ID – The Customer ID value of the Employee.

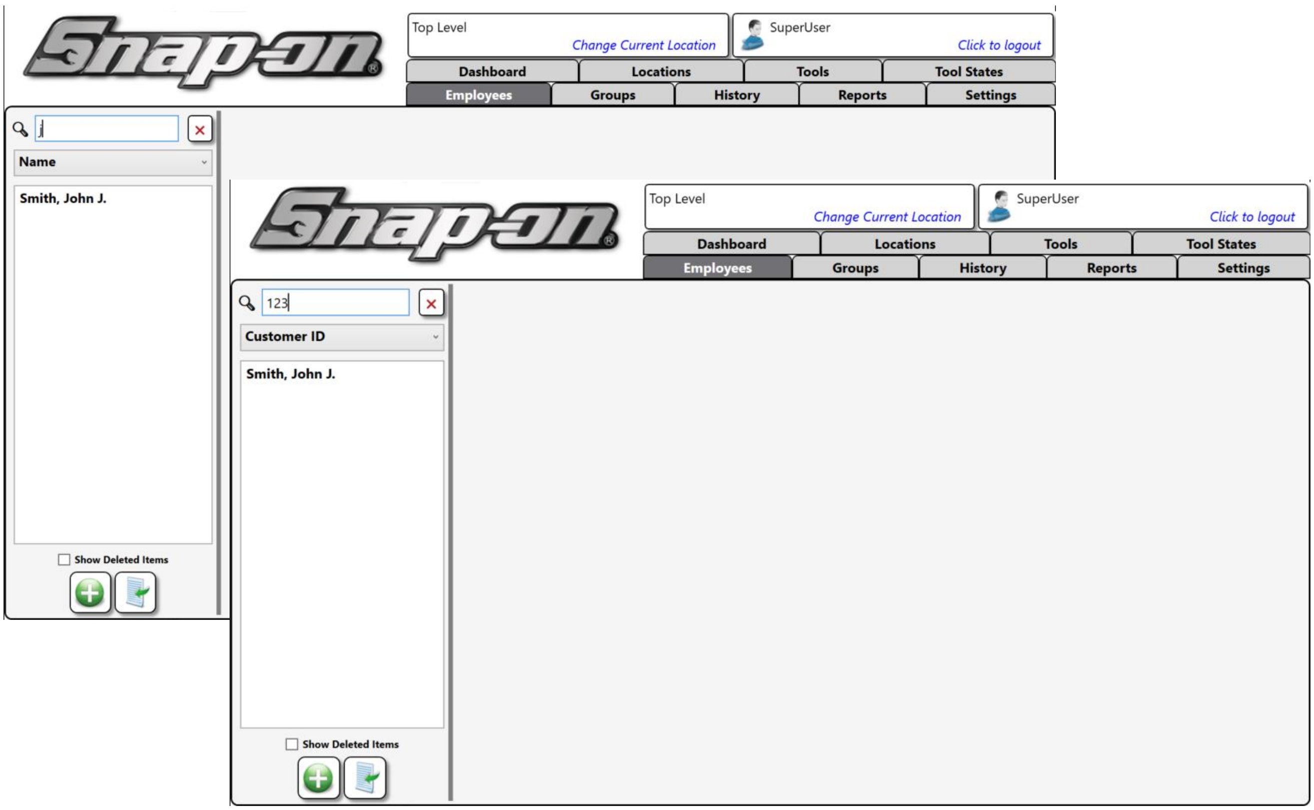
Badge Search – Scan a badge, and the Employee assigned to it will be the result.



Name & Customer ID Search

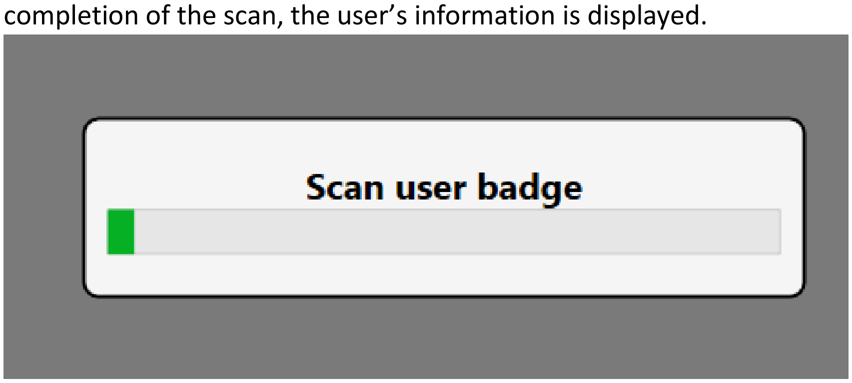
Go to the search bar, make sure the **Name** is selected and start typing the name. As you type the name John, the list will filter. **Customer ID** search works just like **Name** search, except you type in the Customer ID value instead of the name.

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.



Badge Search

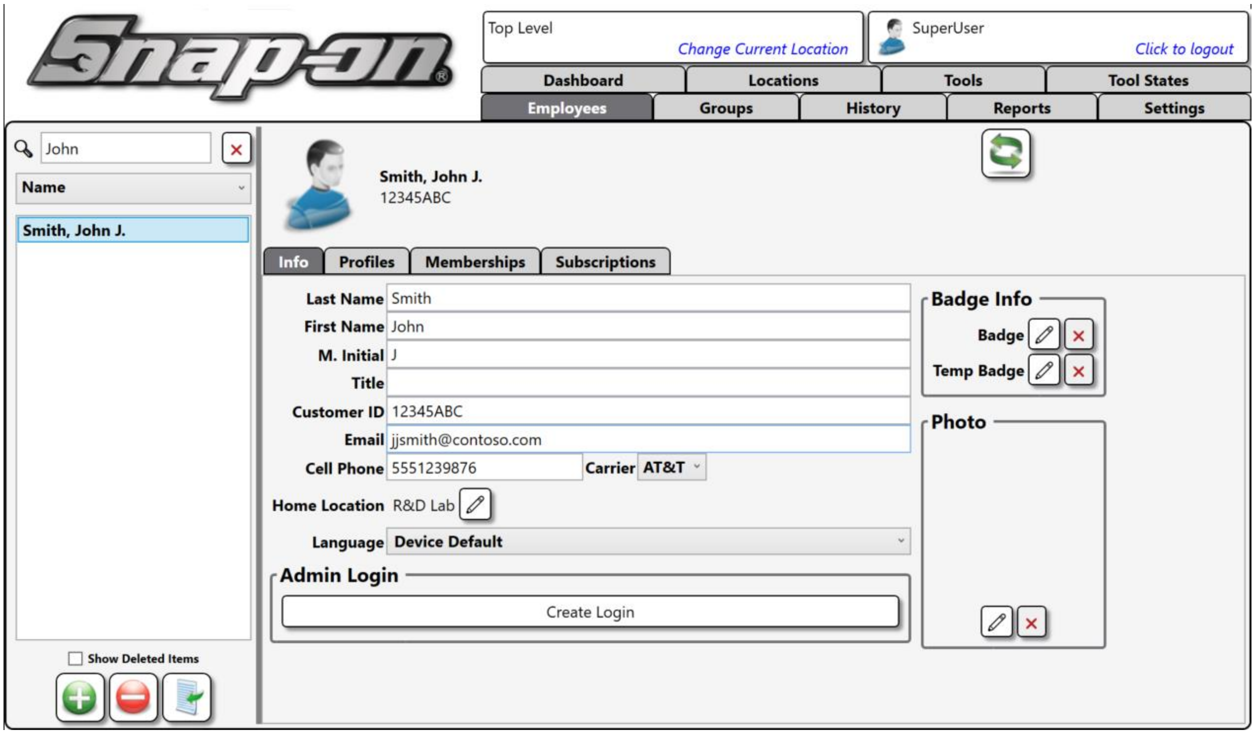
Badge Search requires that you have a compatible card reader to scan the user's Badge. Upon completion of the scan, the user's information is displayed.



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**.



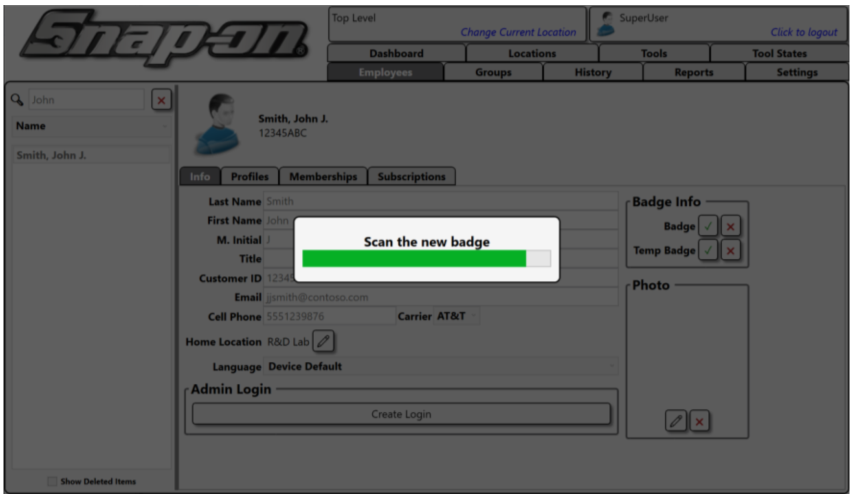
Once you have the Employee displayed, you can make any changes needed. Once done, make sure to SAVE the changes by clicking on the Save icon in the upper right of the screen.

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

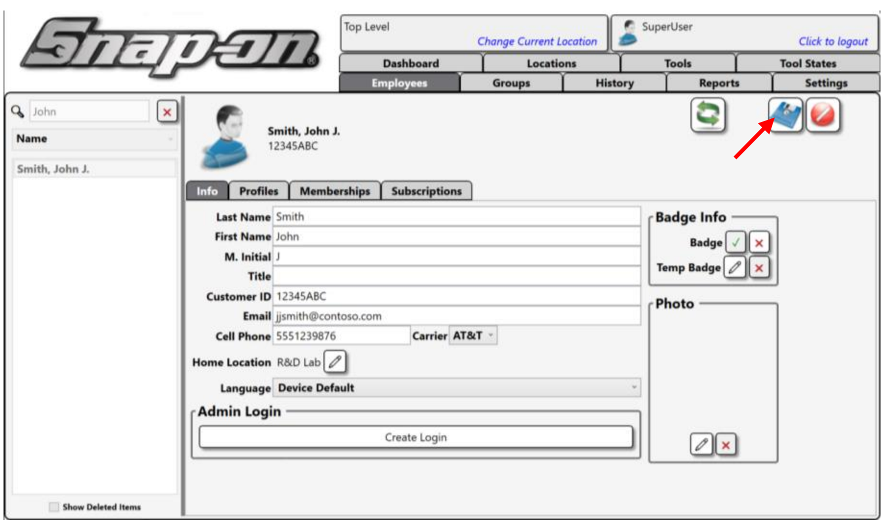
Adding a Badge

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.



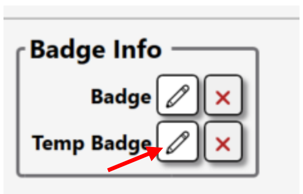
After a successful Badge scan, the button will change to a ✓. With the added Badge, you can now click on the save button to save the changes. Even though the badge has been added to the Employee, they still do not have access to any devices until assigned a profile. Please see the profiles section of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



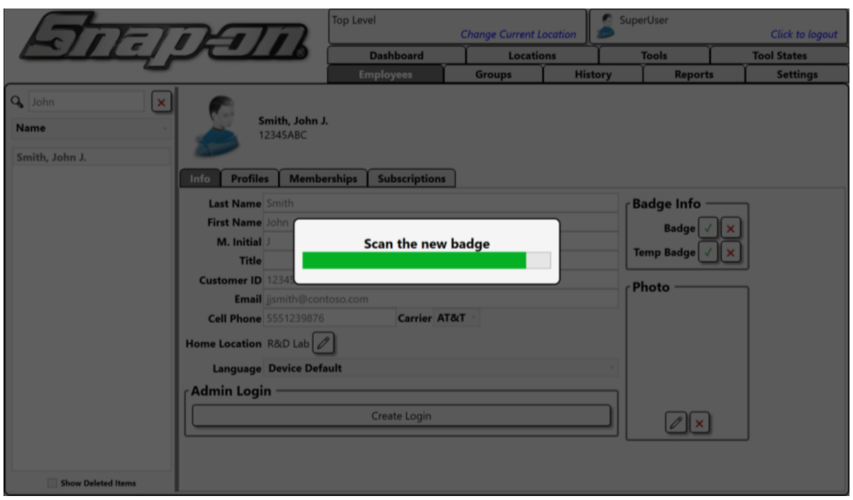
Adding a Temporary Badge

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.

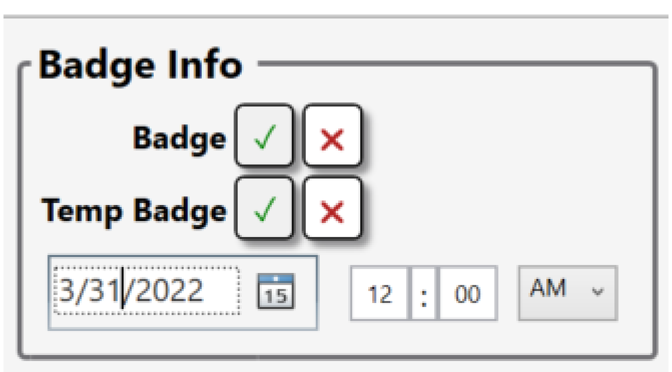
To add a **Temp Badge,** you need to bring up the Employee's properties page. And click on the button by **Temp Badge**.



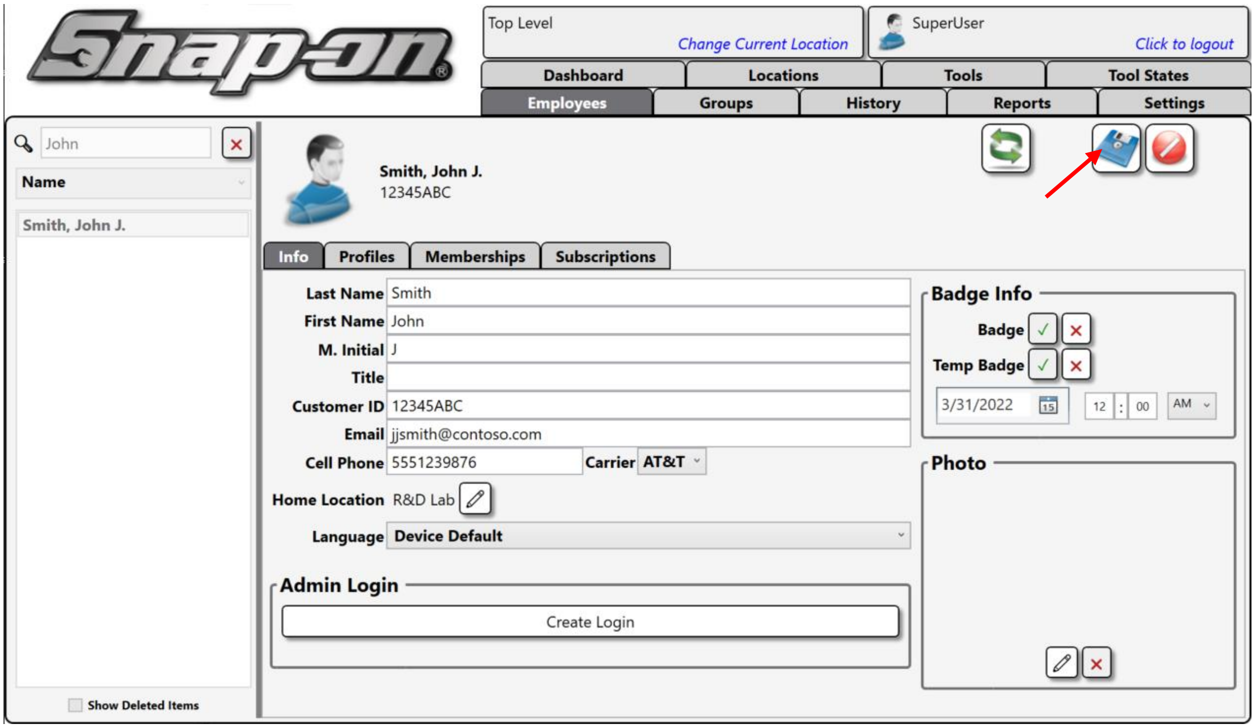
Setting up a Temp Badge works just like setting up the regular Badge.



After a successful Badge scan, the button will change to a ✓. 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.



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



Removing a Badge

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

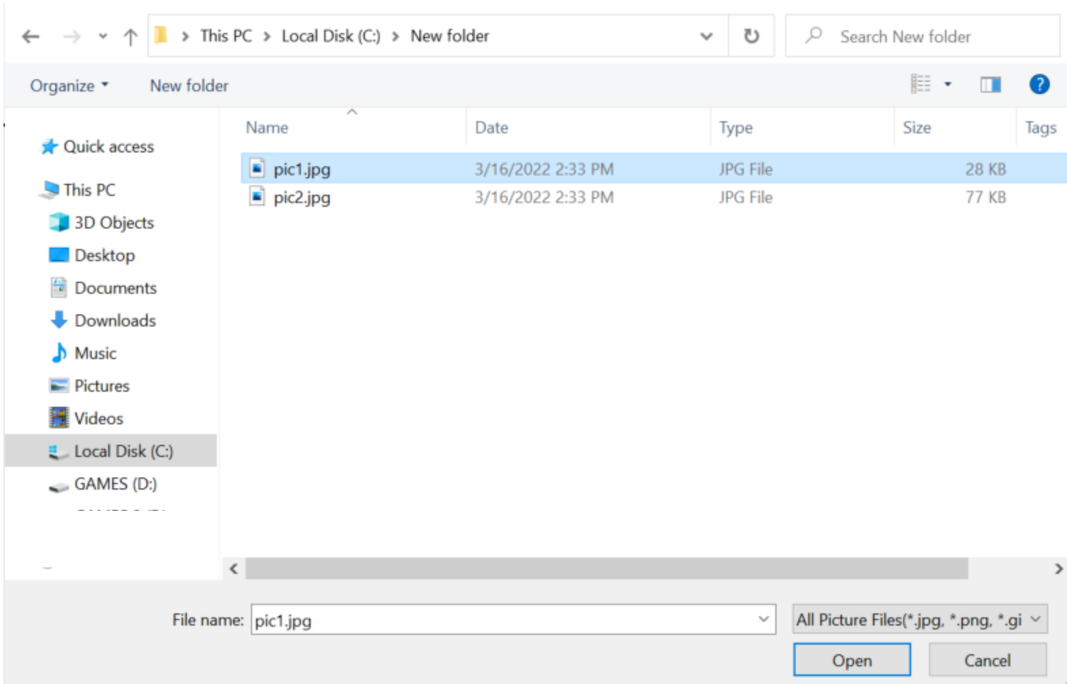
Adding a Photo

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.

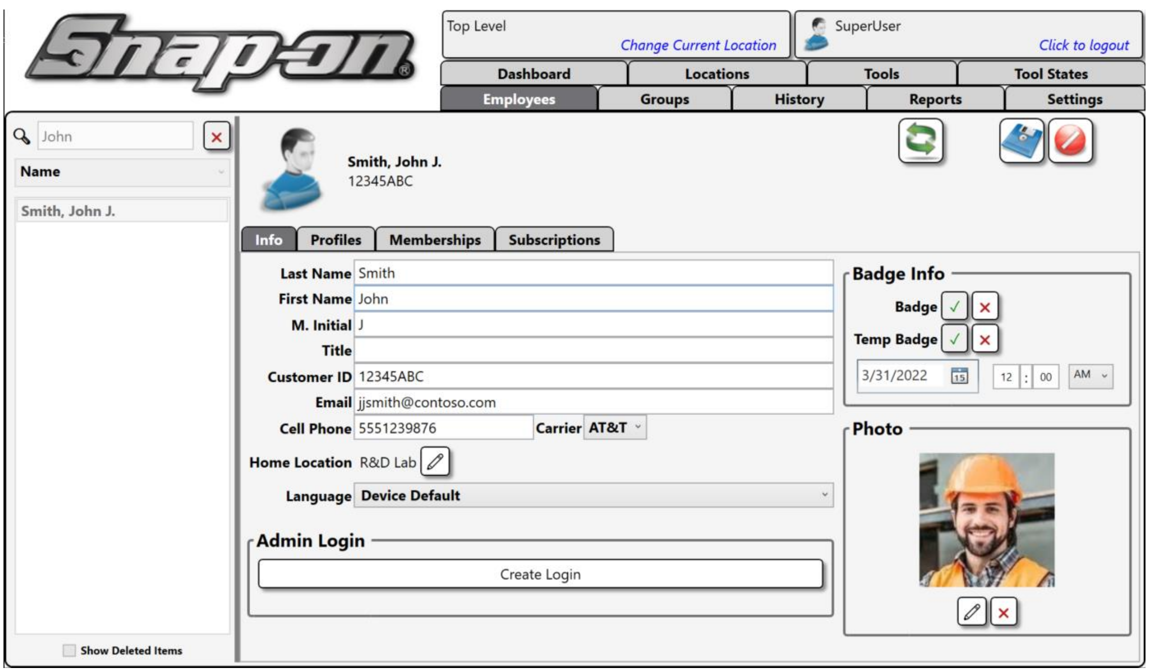
To add a photo to the user, you will need to access that user's Employee Properties. Once on that screen, click on the ✏️ button in the Photo box on the right side of the screen.

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.

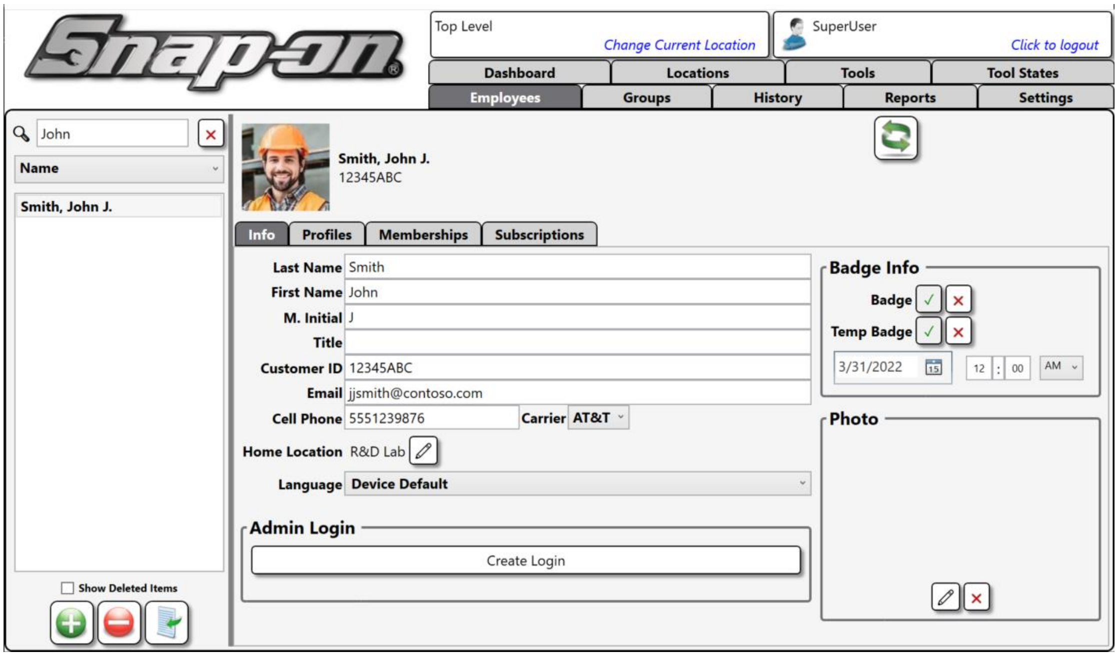
When you click on the button, a file selection window will open. Select this file you want to use as your picture and click open.



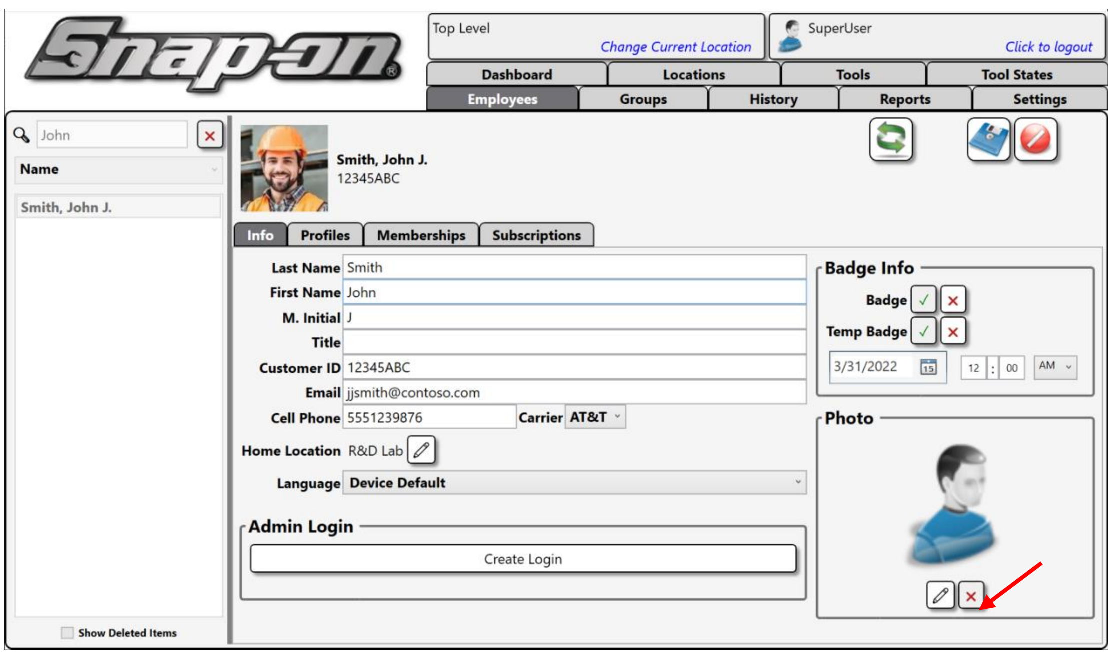
You will now see the picture on the Profile. Click SAVE to commit these changes.



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



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



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

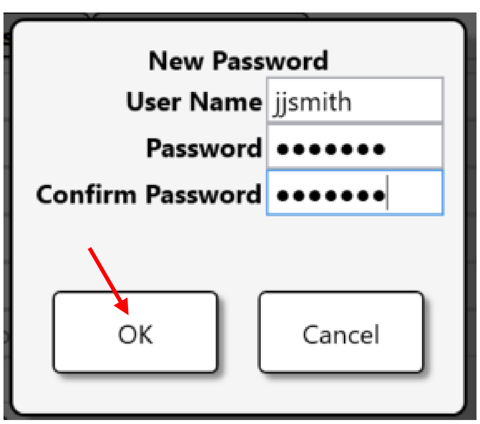
Setting an Employee as Admin

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.

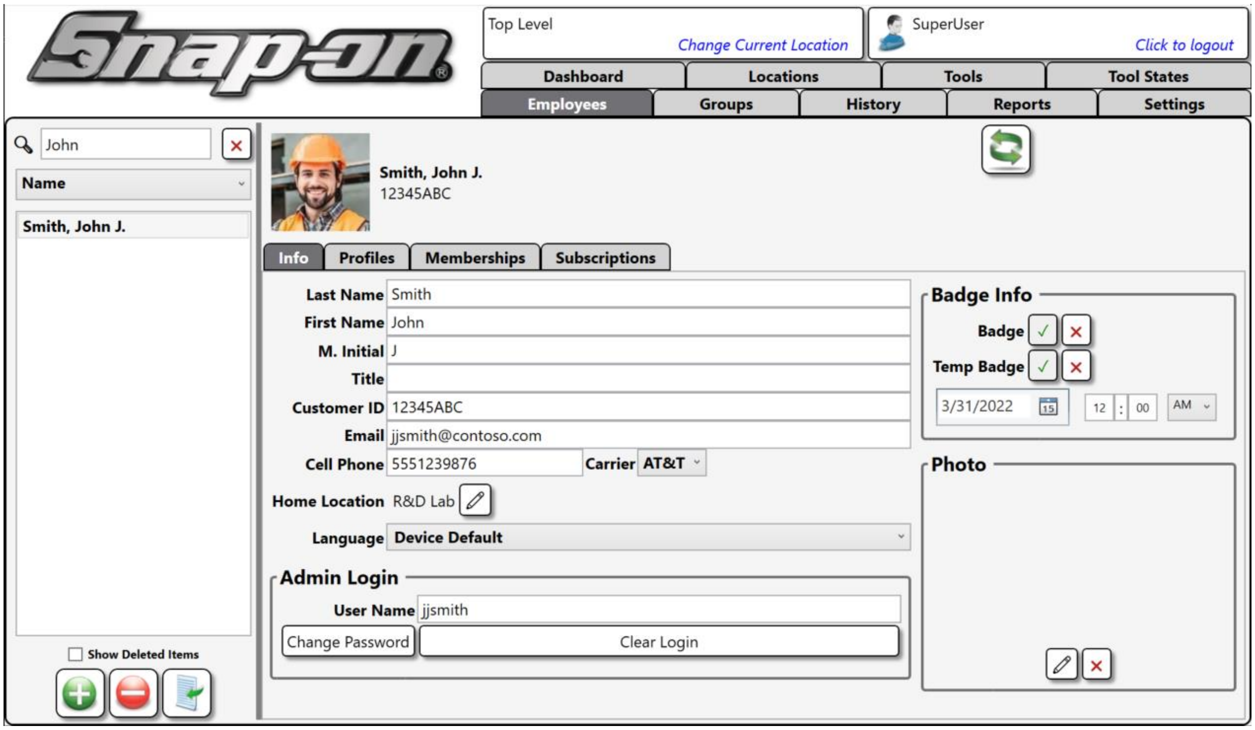
You will need to be on the Employee Properties page to create the admin credentials. Then, from the Admin Login section, click on **Create Login**.

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.

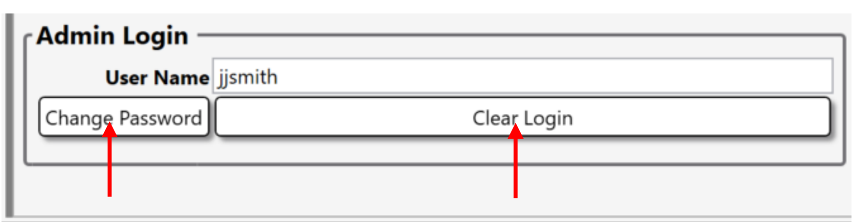


Resetting an Admin Password

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.



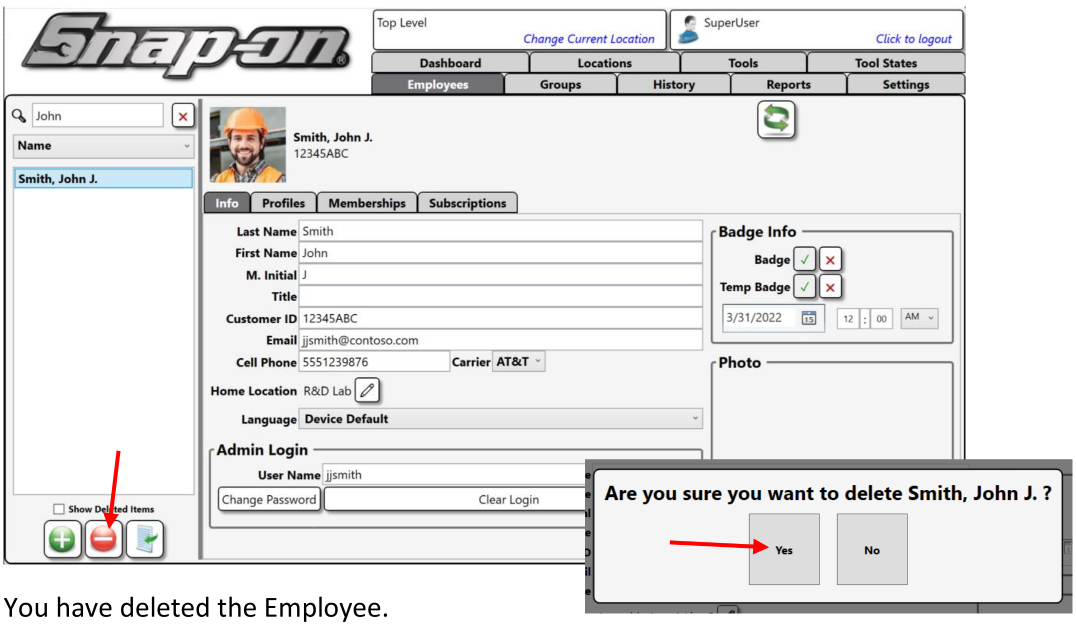
NOTE: When the password is reset, it is temporary, and the user will need to change it on next login.

Deleting an Employee

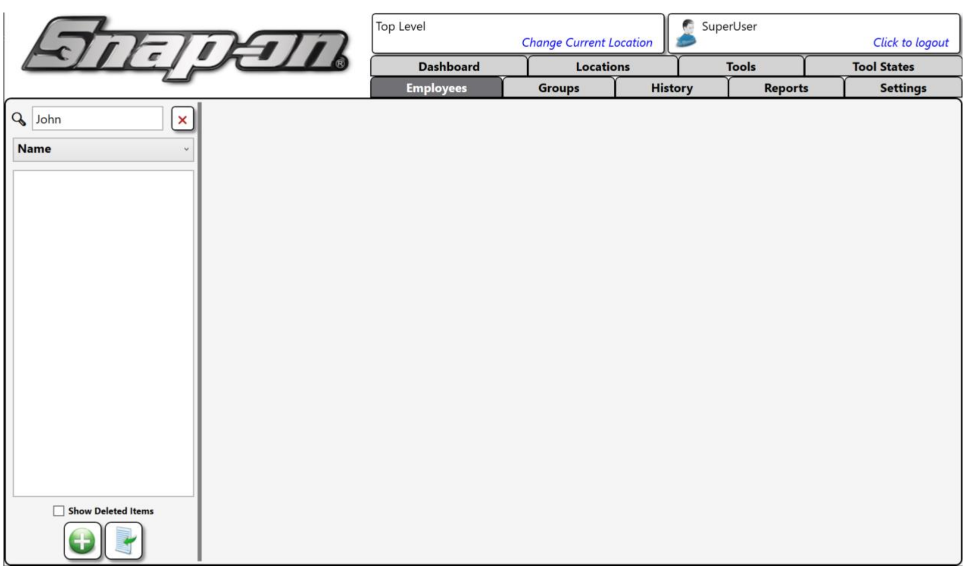
You can delete an account when an employee no longer needs access to the L5 Connect™ system. When you delete the Employee, the system clears all permissions and badges assigned to that Employee. However, all other information remains. Therefore, if you want to give access back to this user, it is easy to do so.

NOTE: Nothing in L5 Connect™ 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.



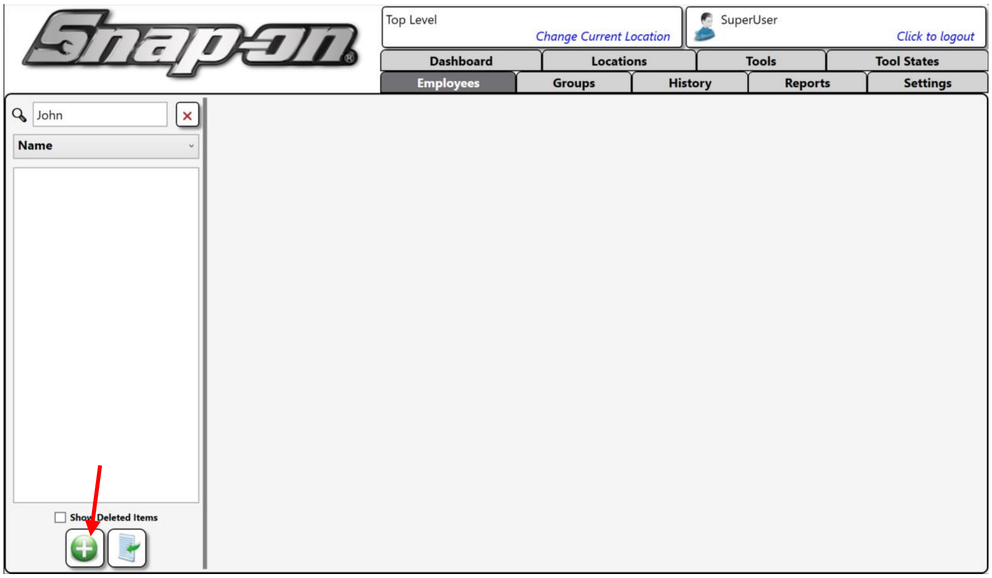
You have deleted the Employee.



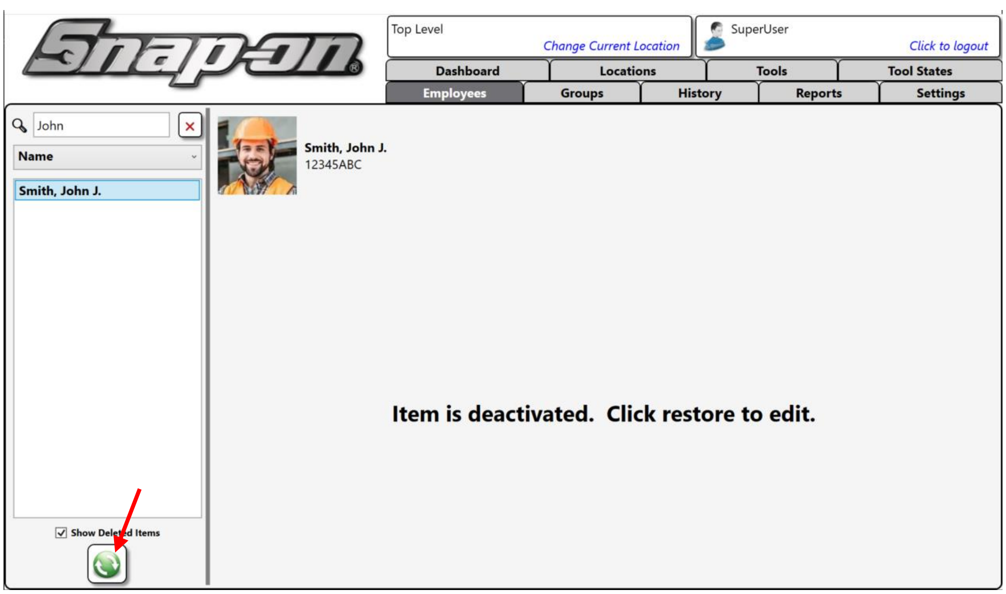
Restoring an Employee

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.

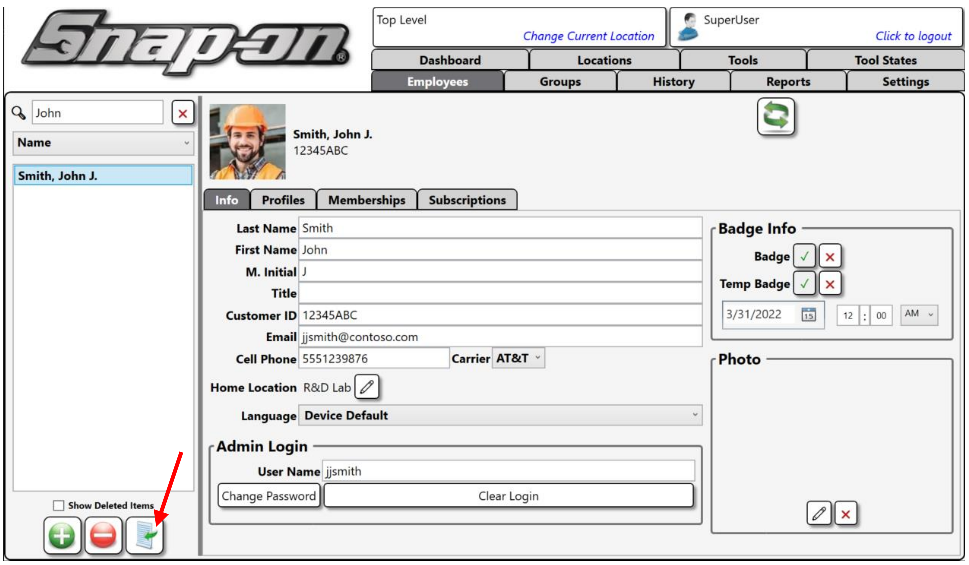
Importing Employees

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

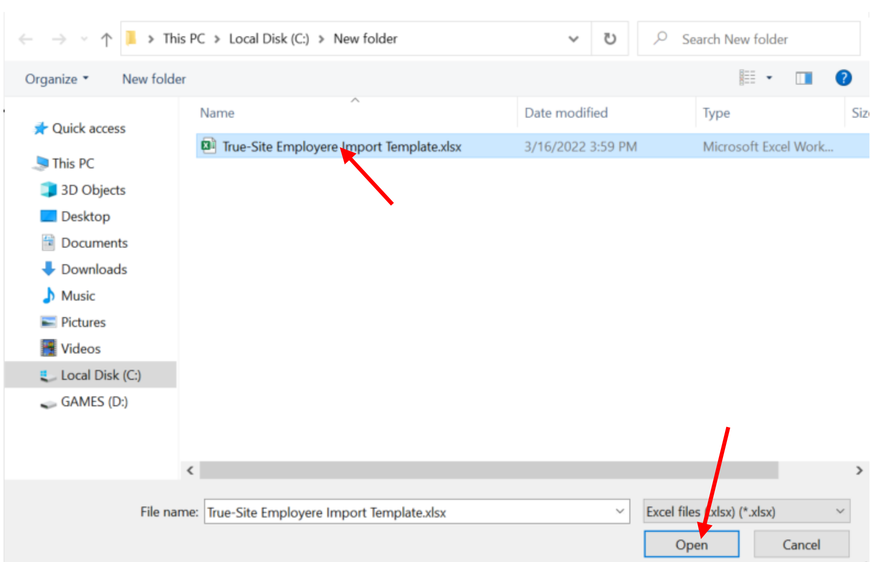
The following is the format of the .xlsx file used for import. One row for each user:

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)

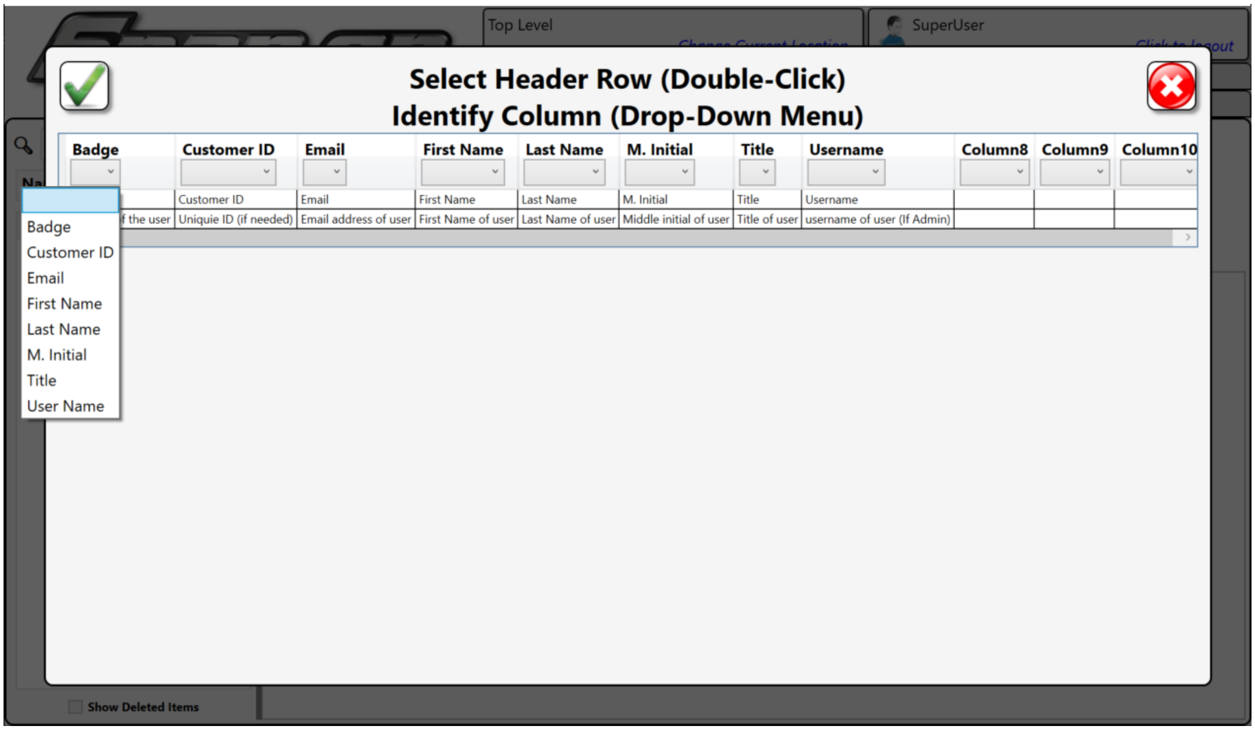
Once you have your file ready, click on the import users button at the bottom left of the Employees tab.



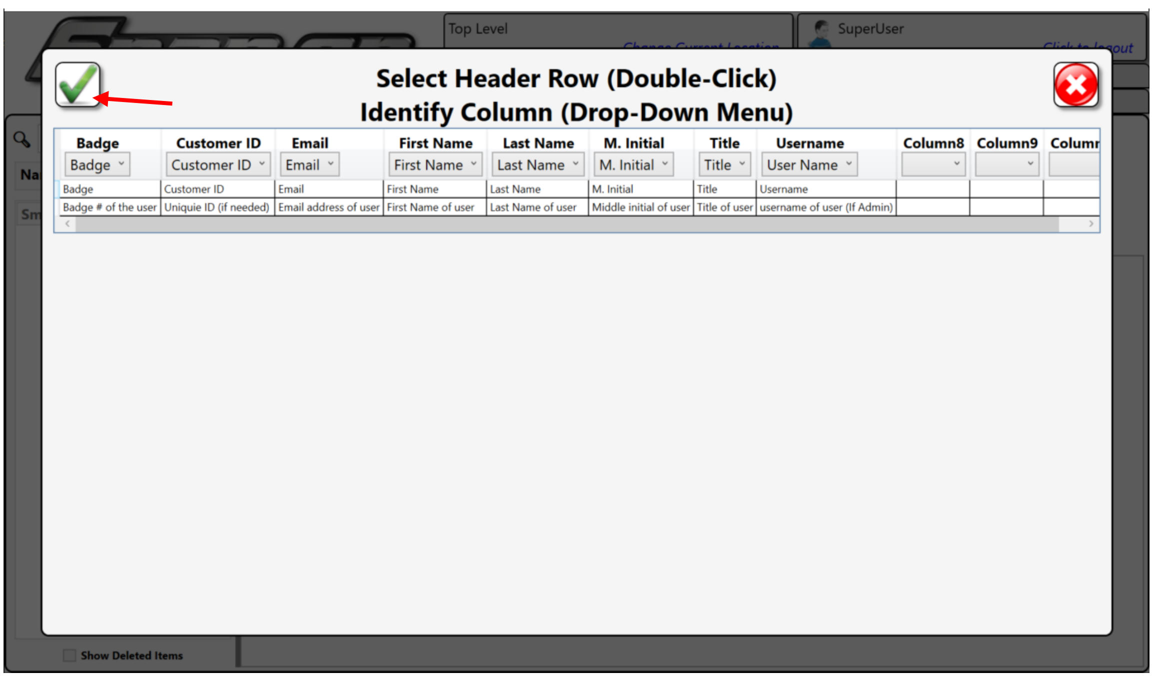
Browse to the location of the file. Once you have it selected, click Open.



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.



Once you have matched all the columns with an attribute, click the ✓ 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.



E-mail and Text

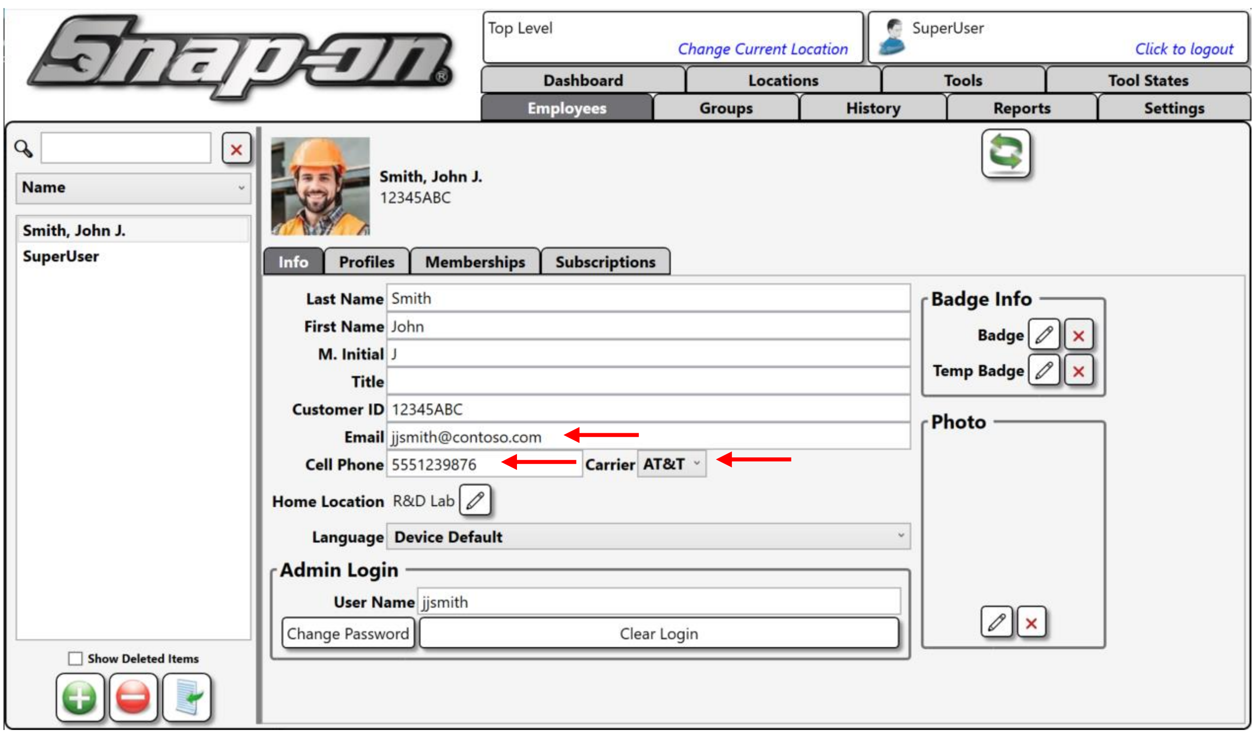
For the L5 Connect™ service to send out any messages, you must configure L5 Connect™ to use a valid e-mail server and texting service. L5 Connect™ uses SMTP for e-mail and text. For more information on configuring SMTP in L5 Connect™, please see the Network Settings section of this guide.

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 Sub-screen. 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.**



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.

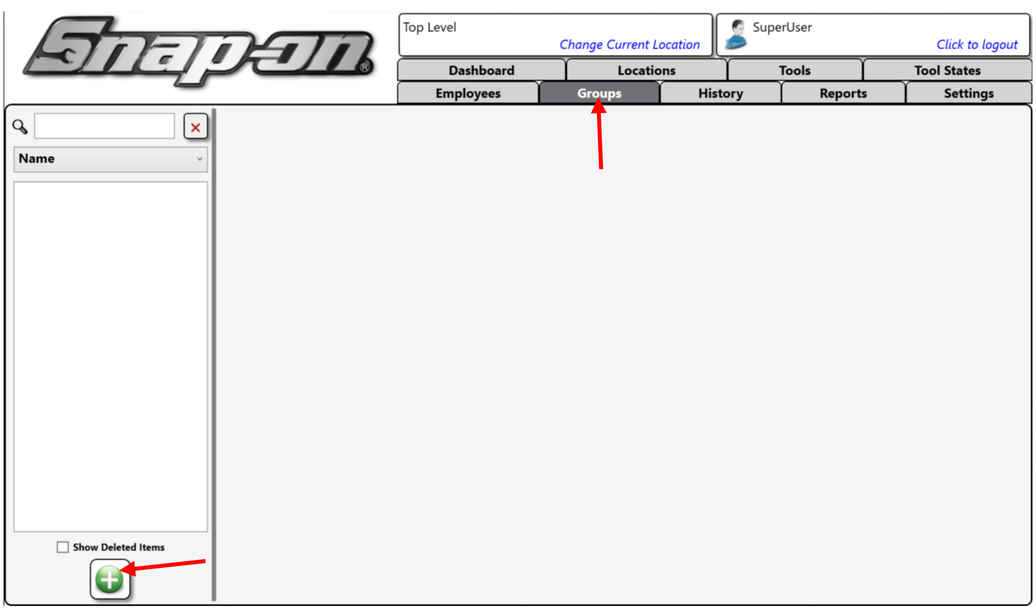
You should set permissions to groups and then assign users to those groups, as setting permissions on Employees can become challenging to manage if you have many users.

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.

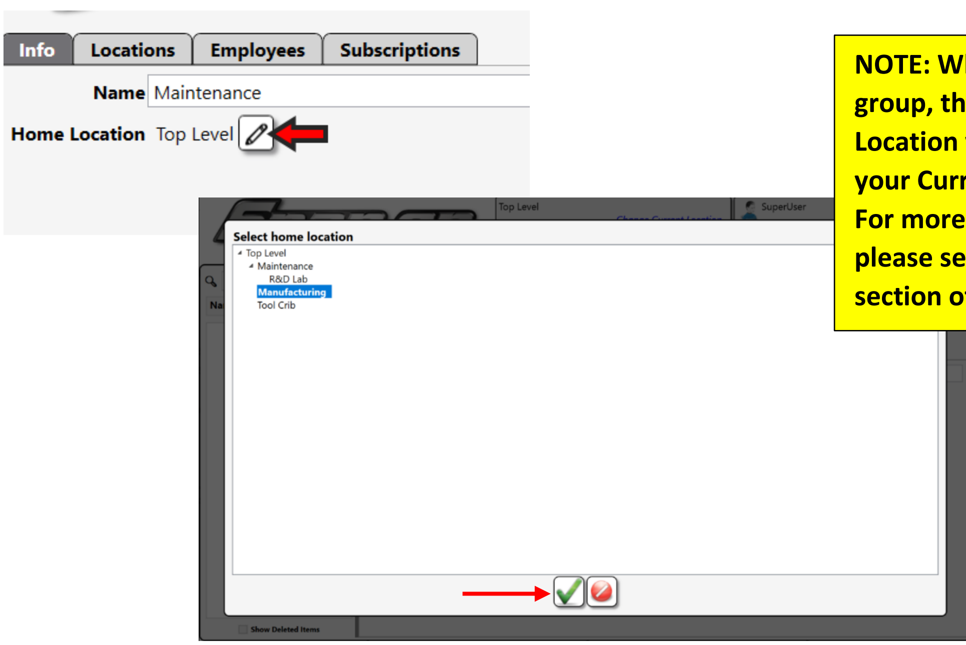


In the Name textbox, enter the desired name of the group.

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

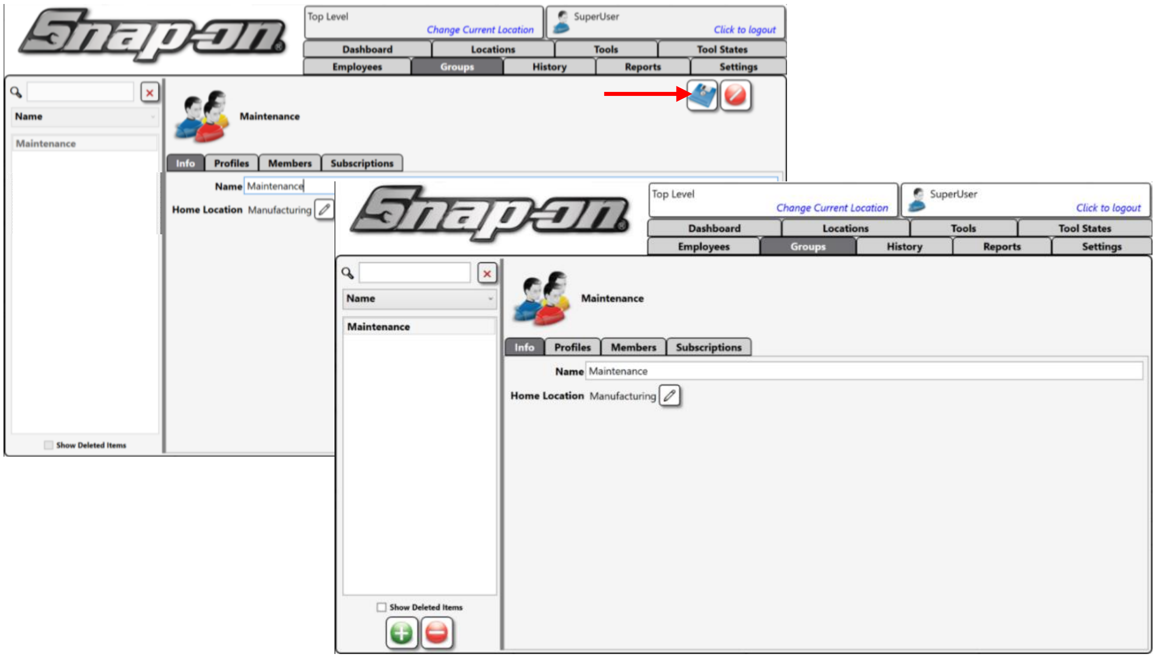
NOTE: The group name must be unique as two different groups cannot share the same name.

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.



NOTE: When creating a group, the Home Location will default to your Current Location. For more information, please see the Locations section of this guide.

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.



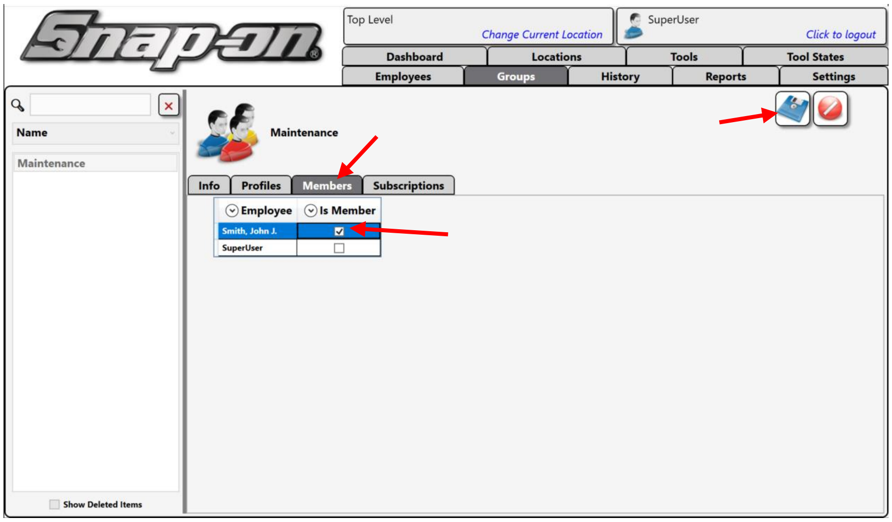
Editing a Group

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

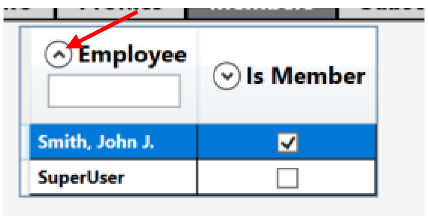
NOTE: The save and cancel icons will not appear until you make a change to the group.

Adding /Removing Employees to a Group

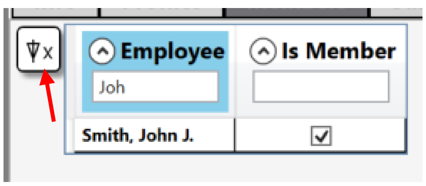
Select the Members sub-tab on the Group Screen to add an Employee(s) to a group. Find the Employee you want to add to the group from the list, then check the **Is Member** check box. Add **John J. Smith** to the Maintenance group, then click on the SAVE button to save our changes.



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.



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.

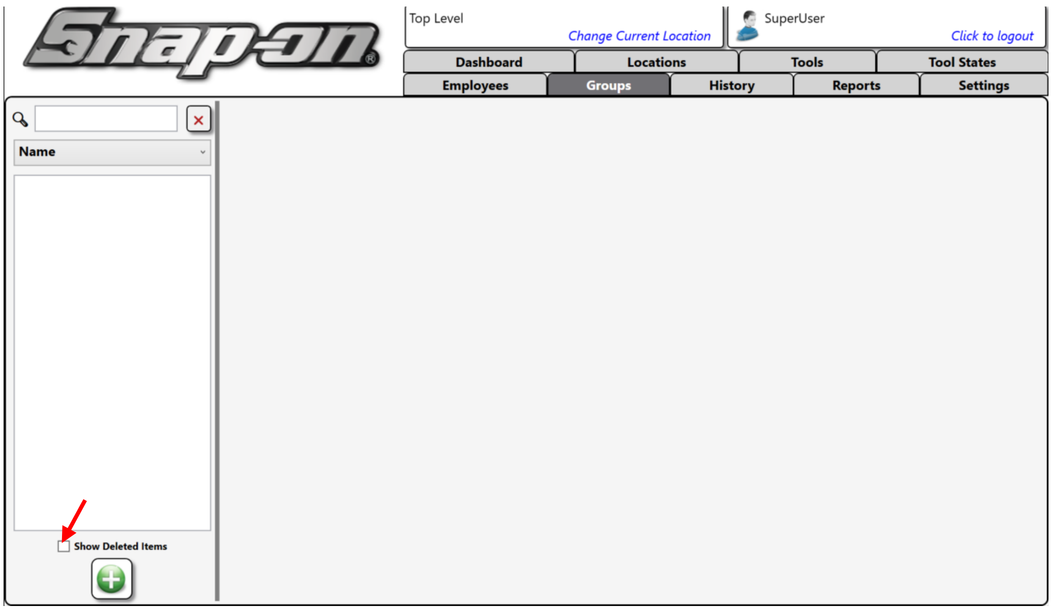
You will then be prompted to confirm that you want to delete this group. Click **YES**.

The group has now been deleted.

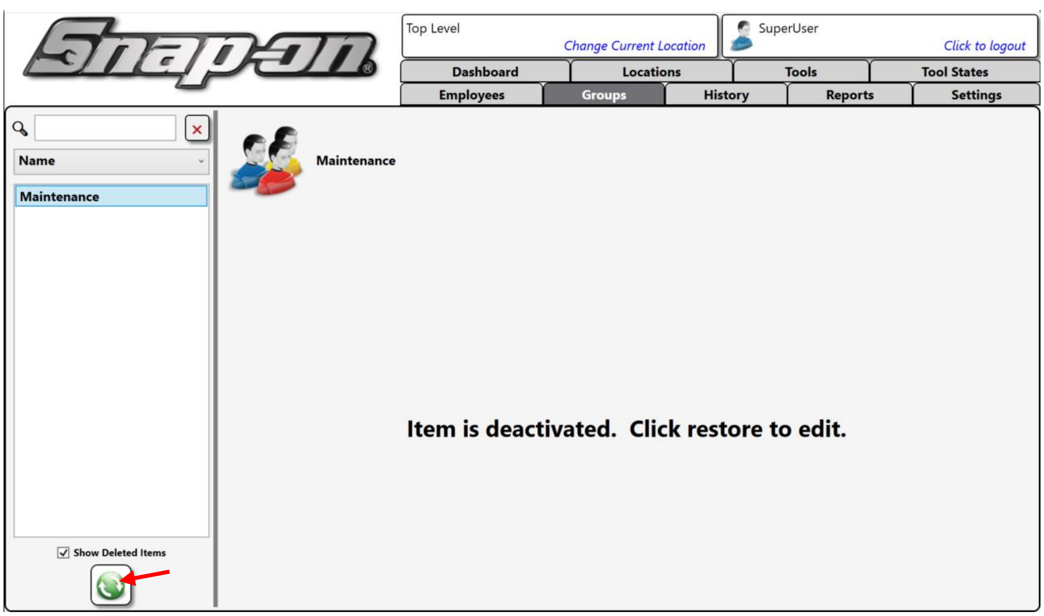
Restoring a Deleted Group

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.

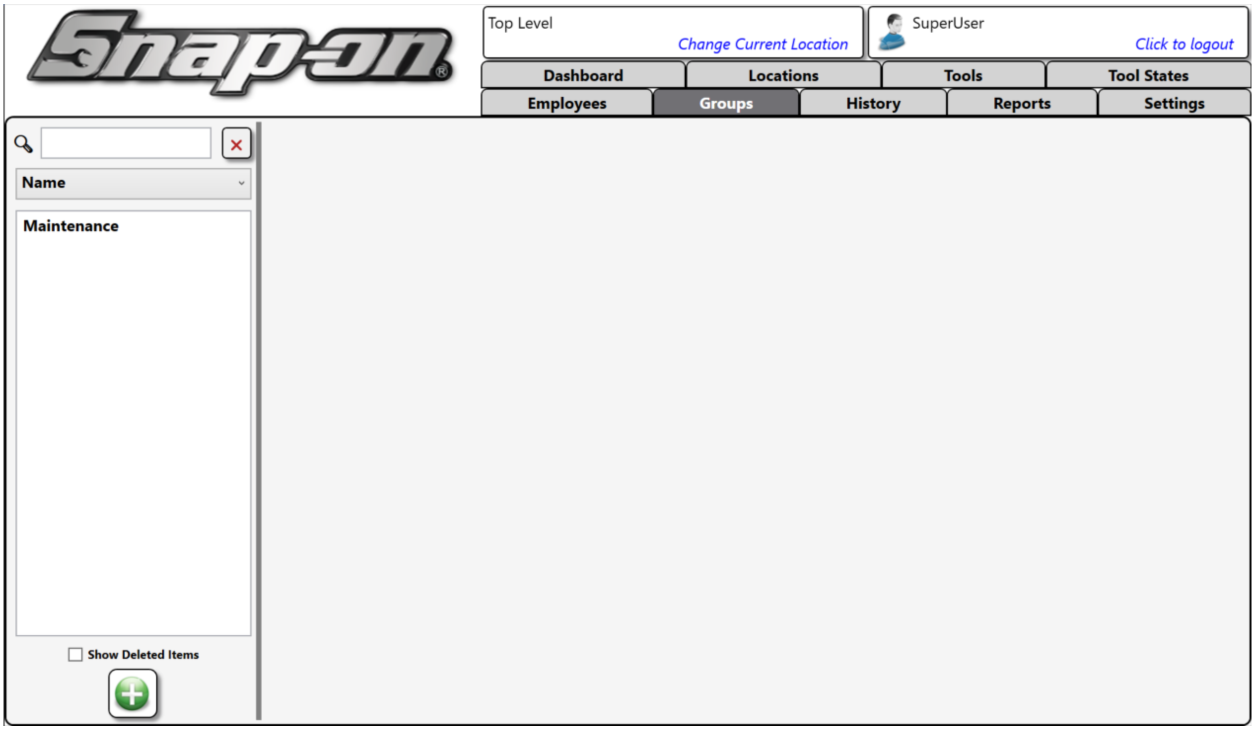
NOTE: If you are not at the top level of the location tree, you will not see all deleted groups. You will only see groups at your current level and any sub location levels.



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.



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™ 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™ Devices
- **Status –** Permissions for the Device States and Status
- **System Configuration –** Permissions for Global L5 Connect™ 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™ 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.

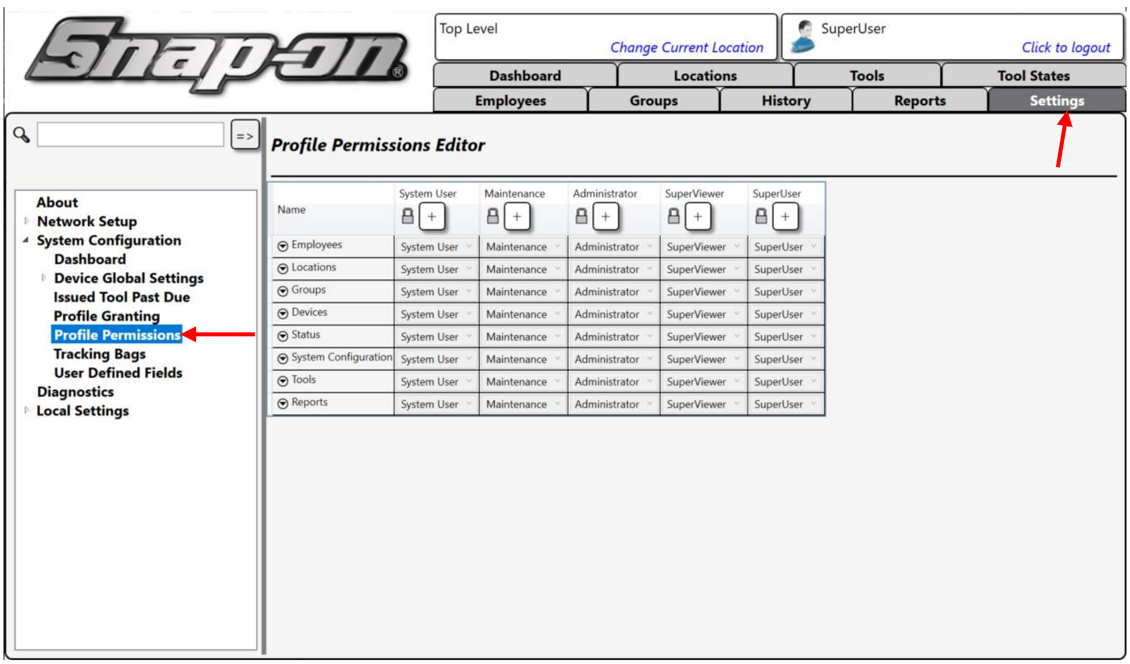
NOTE: These default Profiles cannot be edited or deleted.

Custom Profiles

The five default profiles should cover most roles needed to operate L5 Connect™ 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.

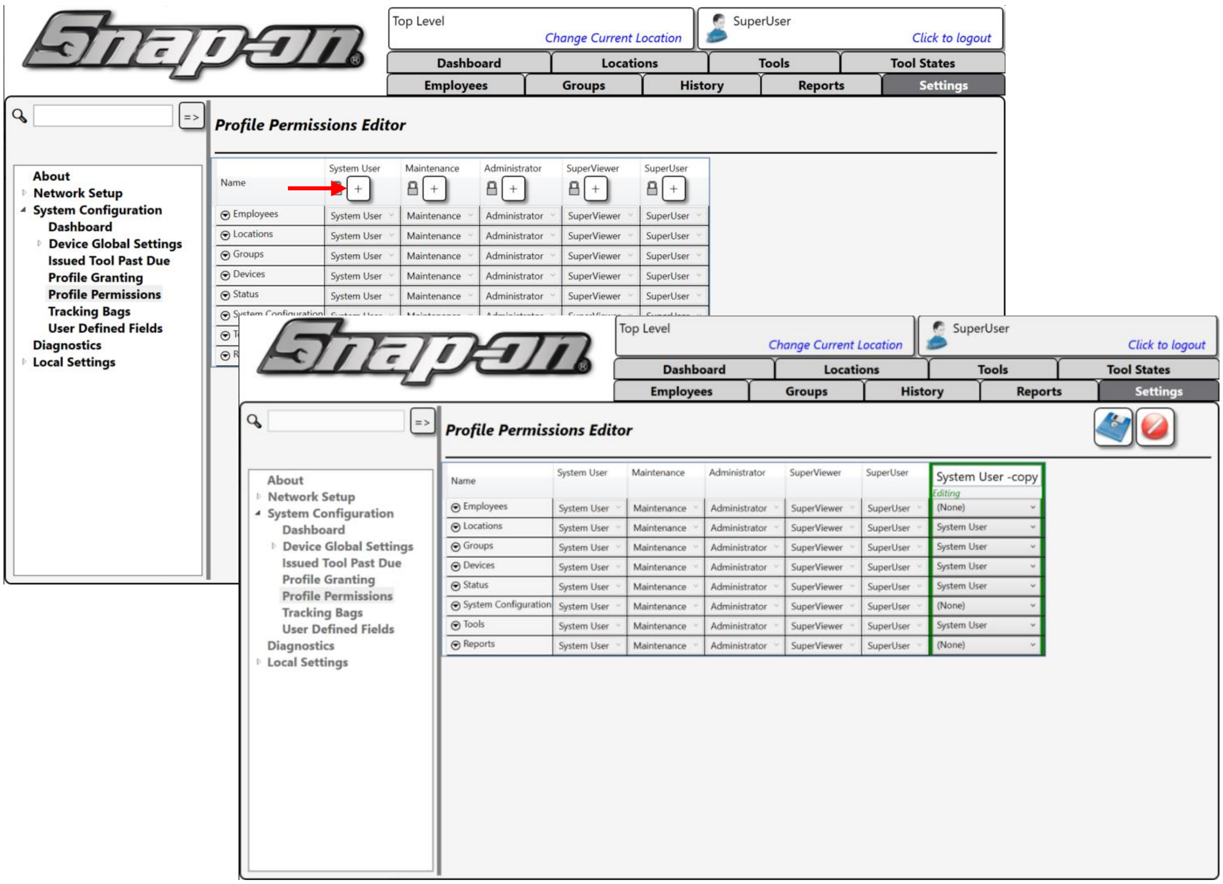
Creating the Custom Profile

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.**

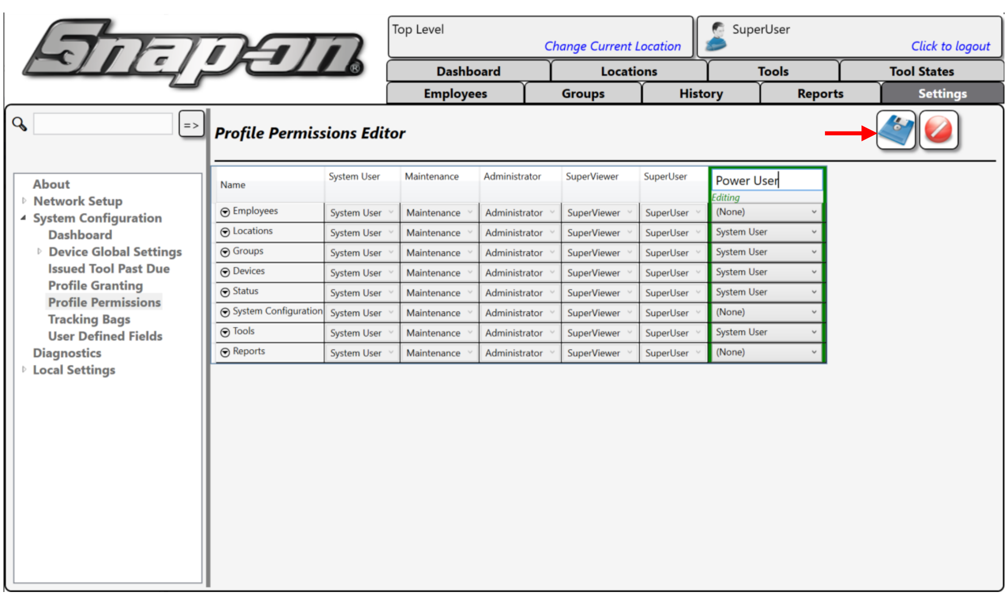


On this screen, you will see all the current profiles in the system. Right now, you only have the default available. To create the new custom profile, you will need to select one of the defaults that match our needs as closely as possible. In this case, you will be creating our custom profile based on the **System User** Profile.

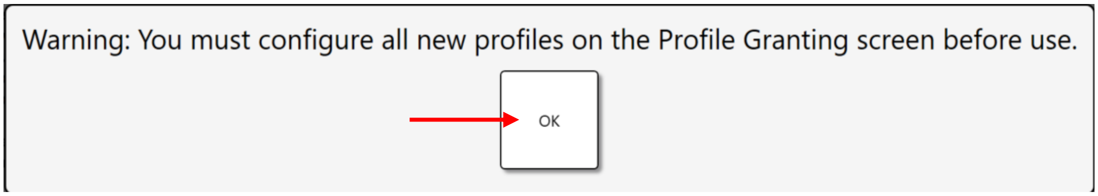
Click the + icon under **System User**. This will create a copy of the **System User** profile that you can modify.



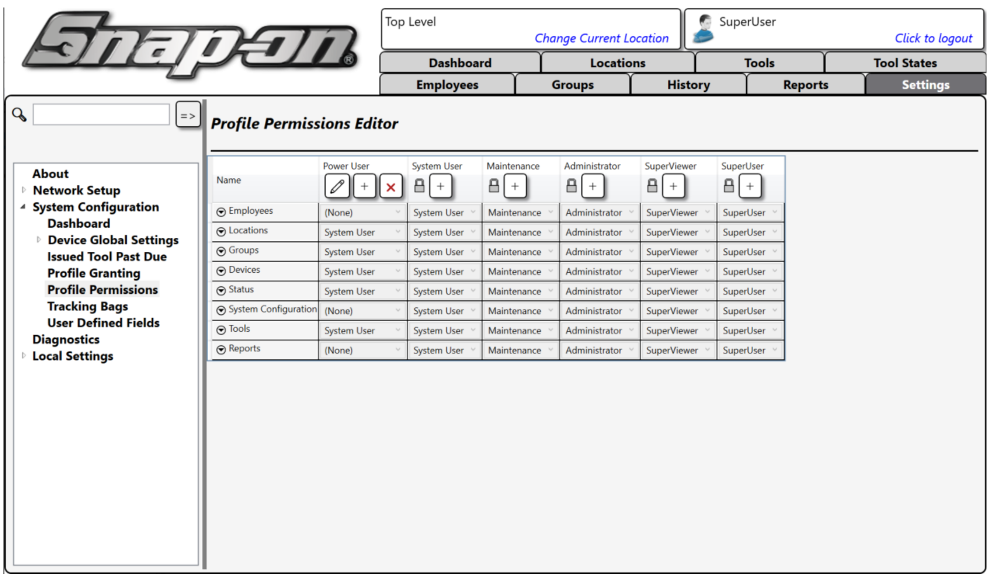
Let's rename the Profile to **Power User**. Then you will click on the Blue **save** icon.



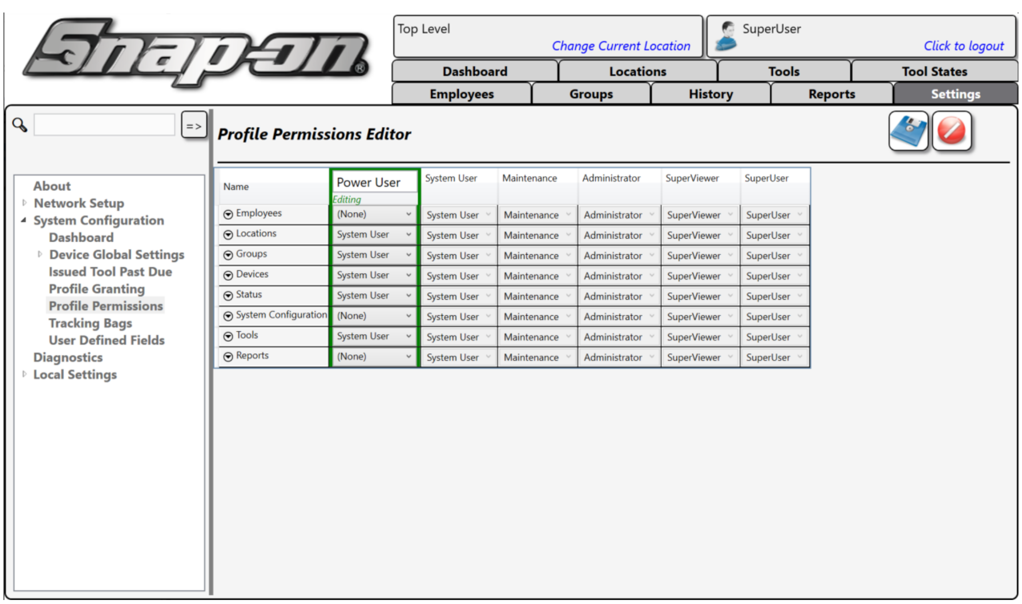
You will be presented with a message box informing you that the new Profile must be set in the **Profile Granting** screen before use. More information about Profile granting will be later in this section. Click **OK.**



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.

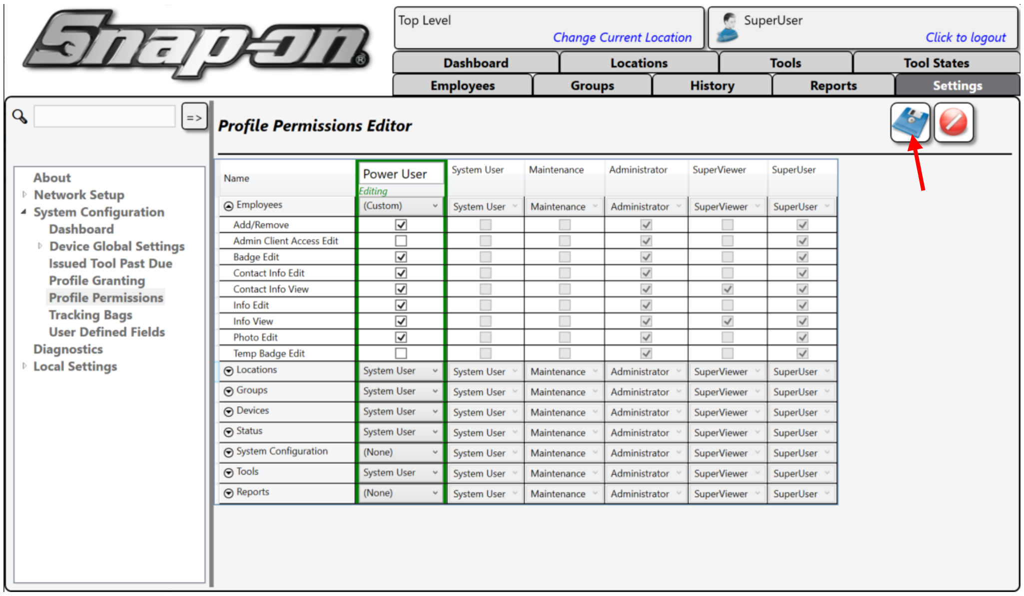


Click on the icon for **Power User,** and enter edit mode.



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.**

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

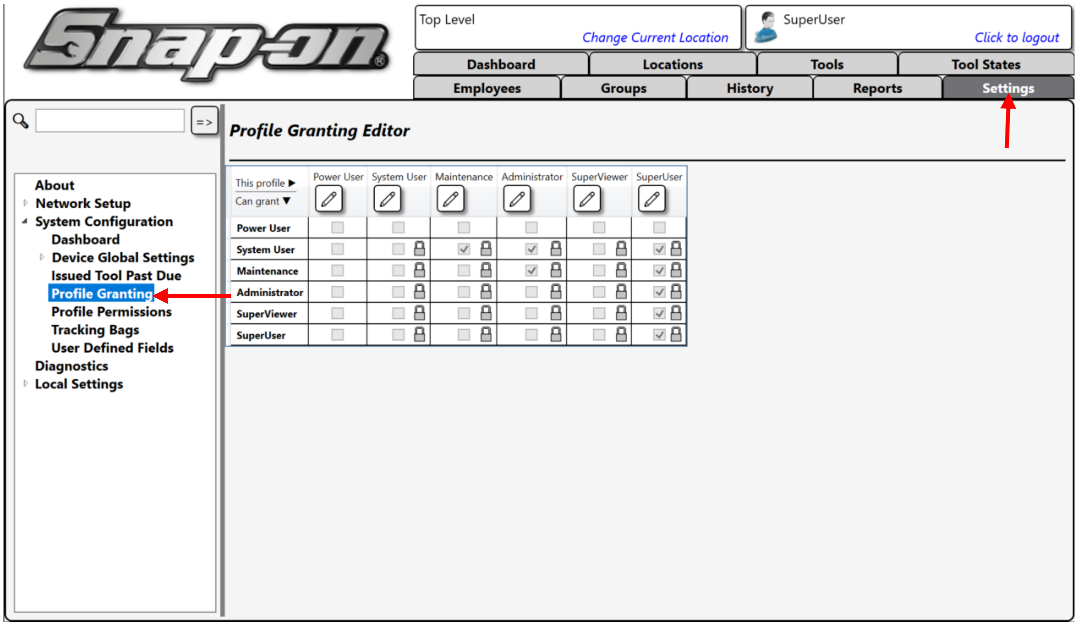


If you want to **delete** a profile, click on the X icon under the Profile's name. Then save your changes.

Profile Granting

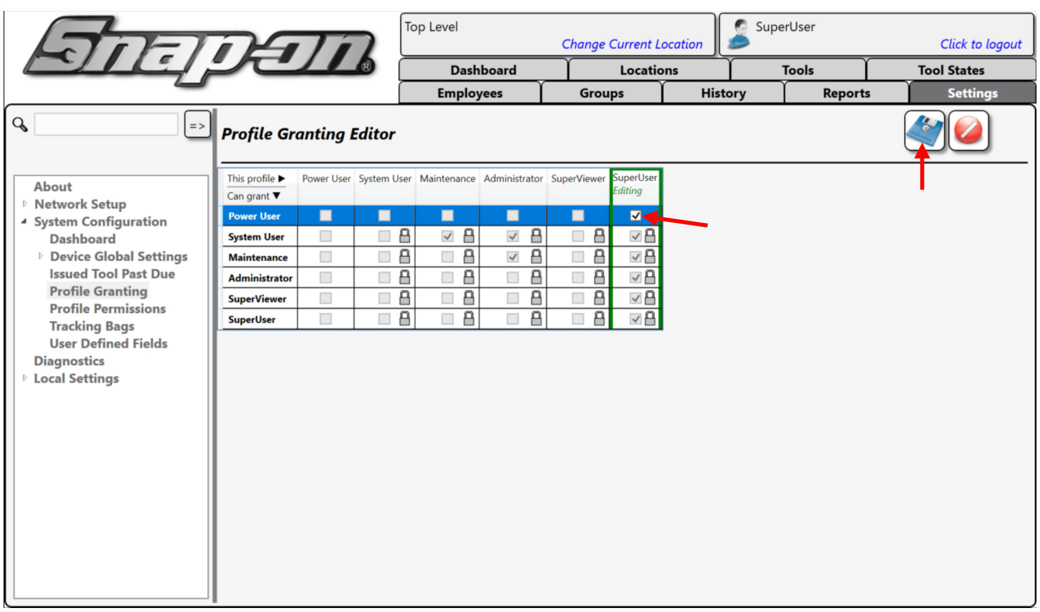
When you create a new custom profile, you need to determine which other profiles in the system can assign that new Profile to users and groups. This is done in the **Profile Granting Editor**.

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**.

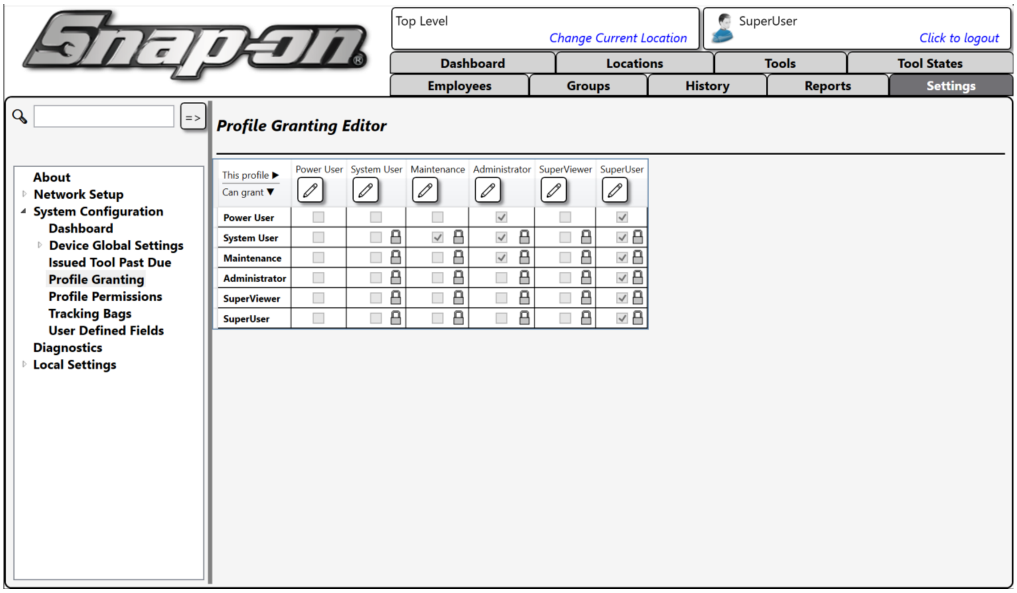


The checkboxes on the screen represent if a profile has access to grant other profiles. You need to give **Super User** and **Administrator** the ability to grant the **Power User** profile. If you click on the  icon, you will enter edit mode for that Profile. All other profiles will be locked until 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.



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:



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

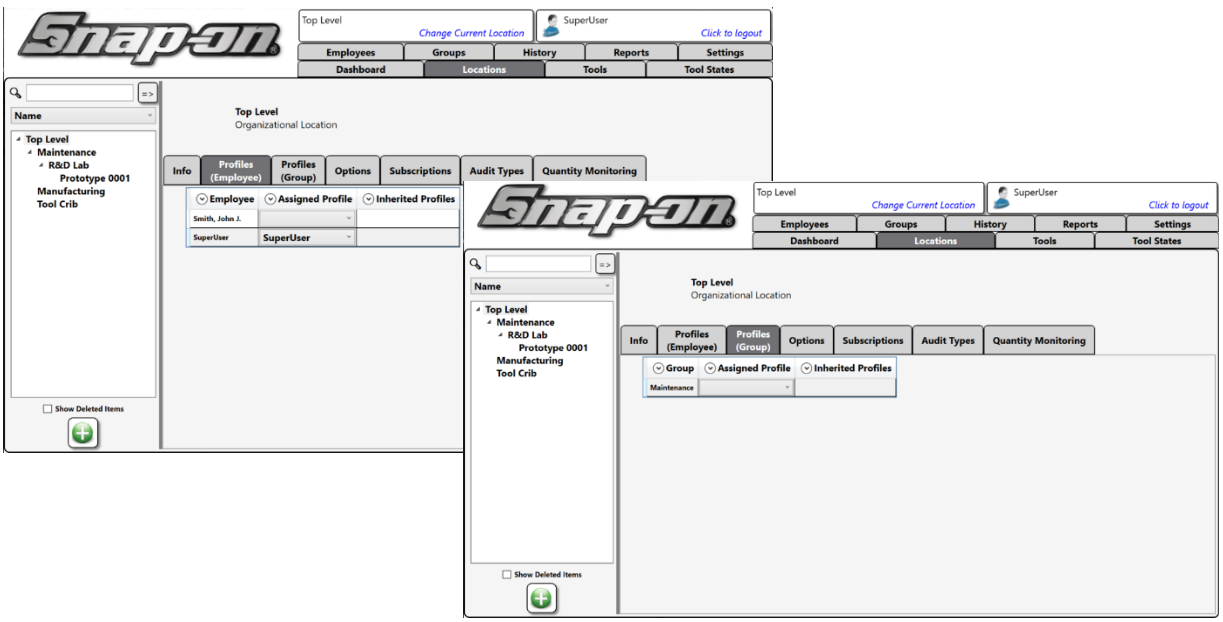
Assigning Profiles

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.

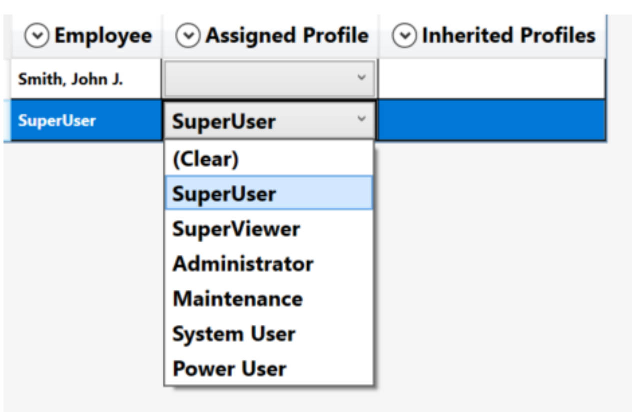
Location Tab Method

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.



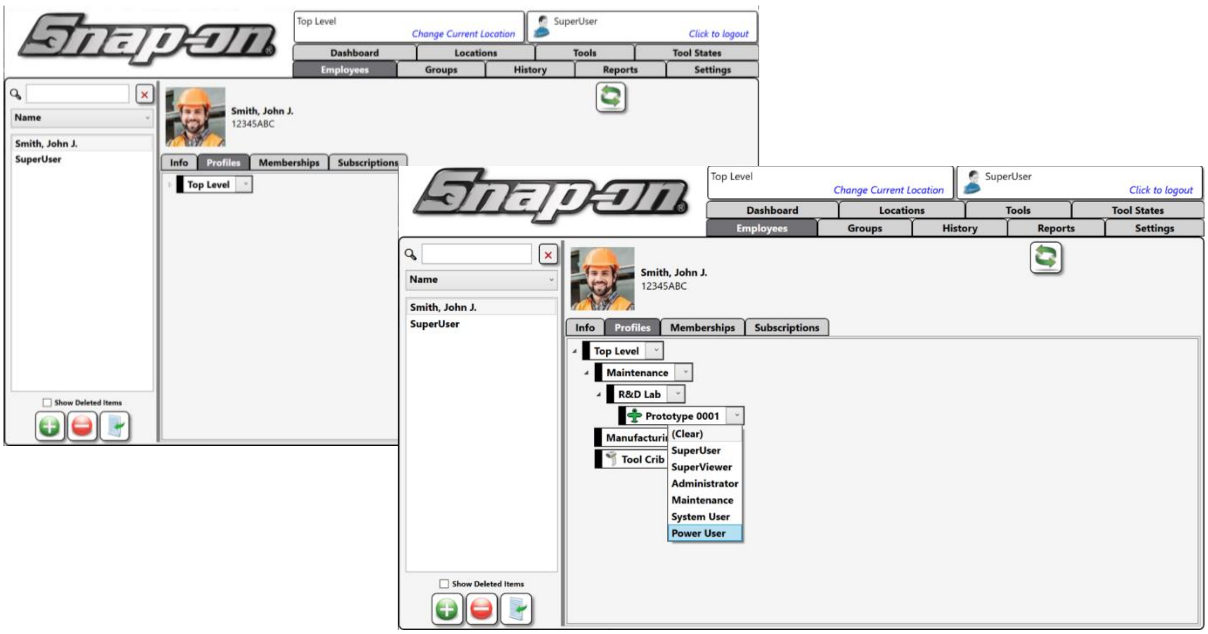
Simply use the pull-down to select which Profile you want to assign to a particular Employee or Group, depending on which sub-tab you are on. Once selected, click the SAVE button in the top right of the screen.



Employee Method

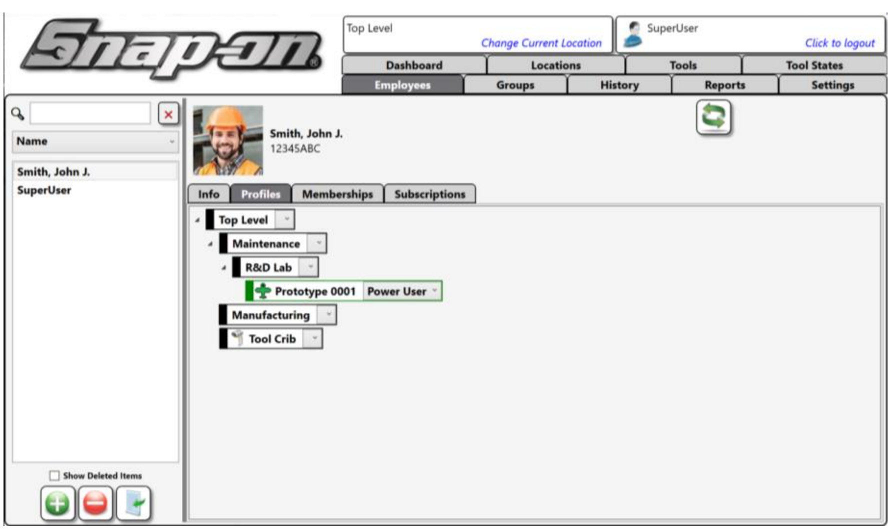
The second method to assign profiles is the **Employee Method**. In this method, you will use the **Profiles** sub-tab on the **Employees Tab**.

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.

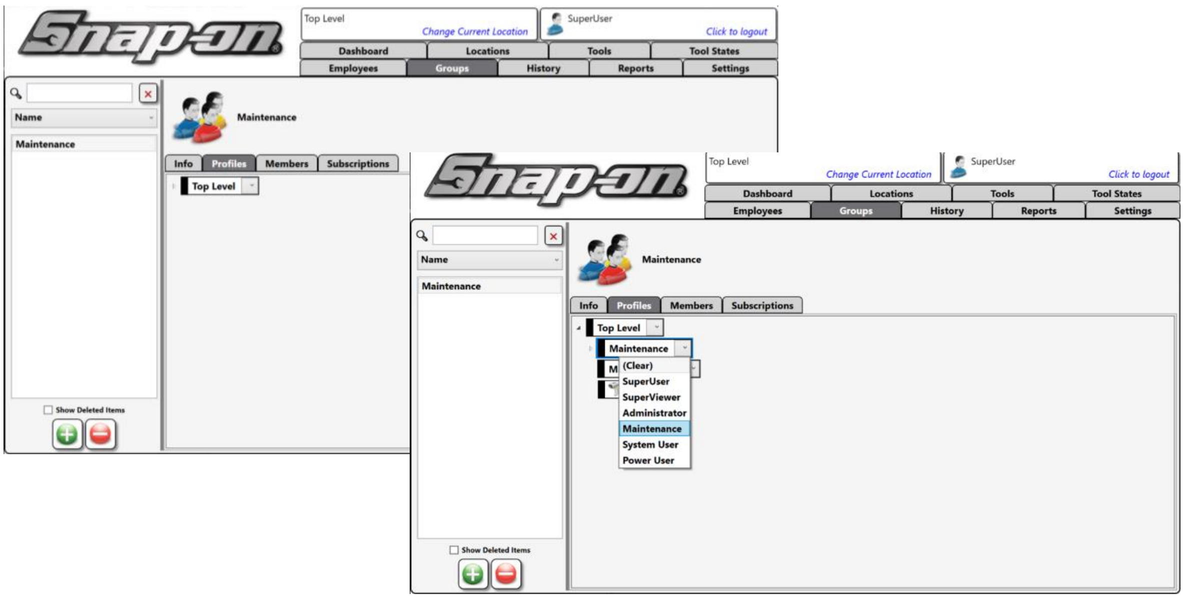


NOTE: When a profile is assigned the location will turn GREEN, when no profile is assigned, the location will be BLACK.

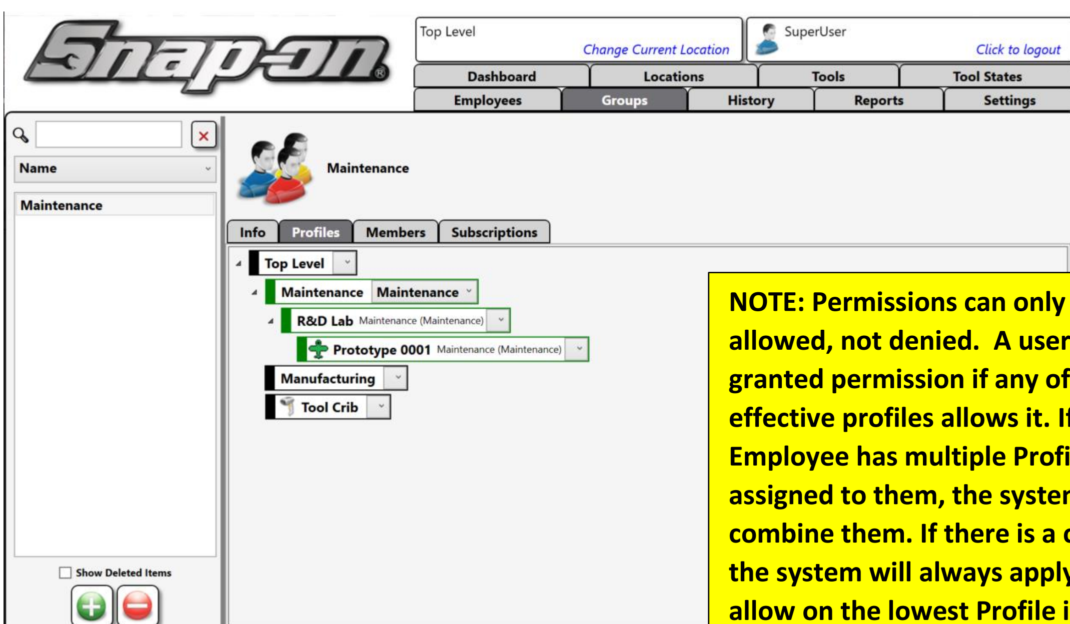
Group Method

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

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



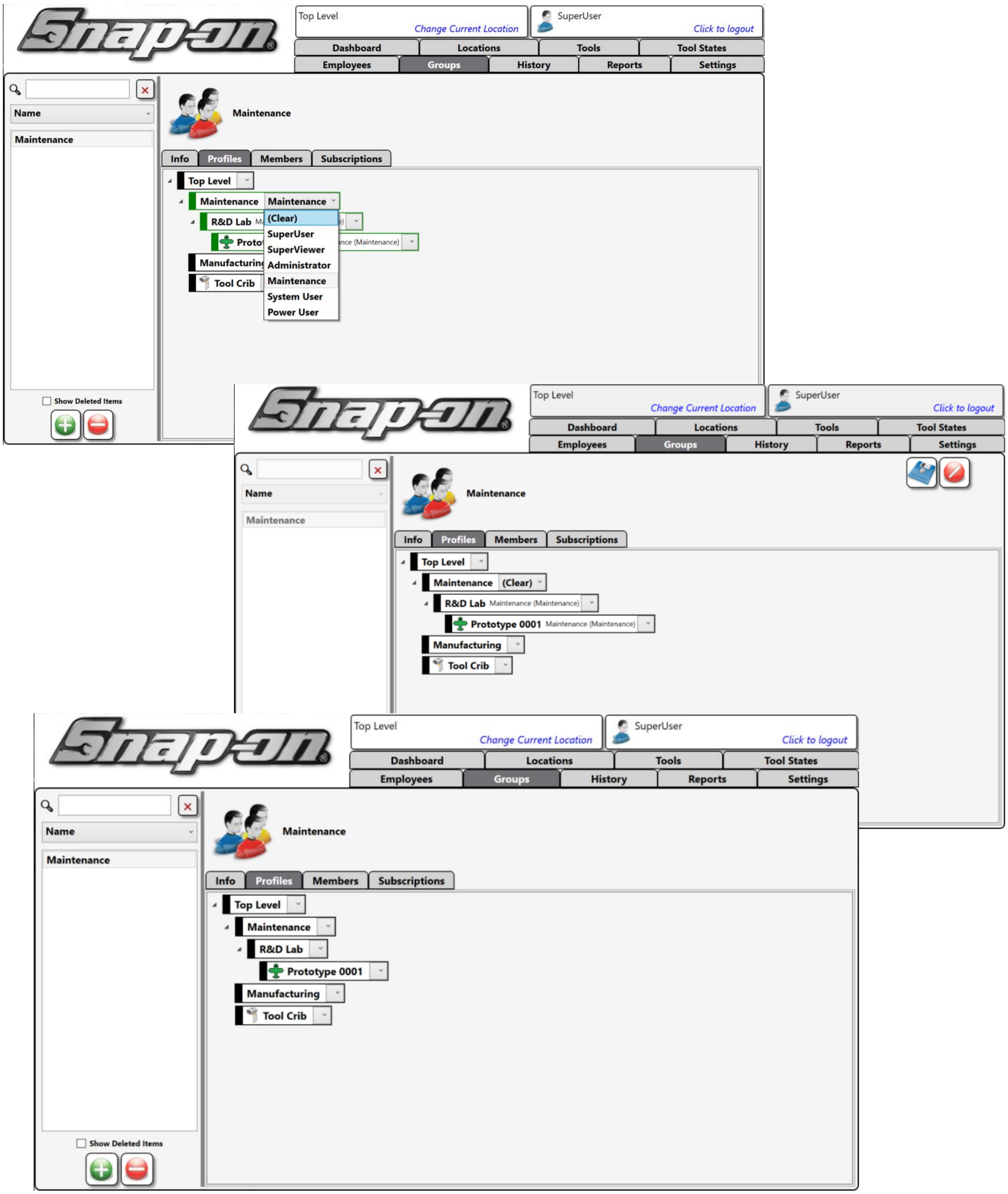
Now use the pull-down to select the Profile you want to assign. Then save the Group. As you can see, when you set a **Profile** to a location with sub-locations, the same **Profile** is applied to the parent's **Child Locations**.



NOTE: Permissions can only be allowed, not denied. A user will be granted permission if any of their effective profiles allows it. If an Employee has multiple Profiles assigned to them, the system will combine them. If there is a conflict the system will always apply the allow on the lowest Profile it is defined on.

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™ 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).

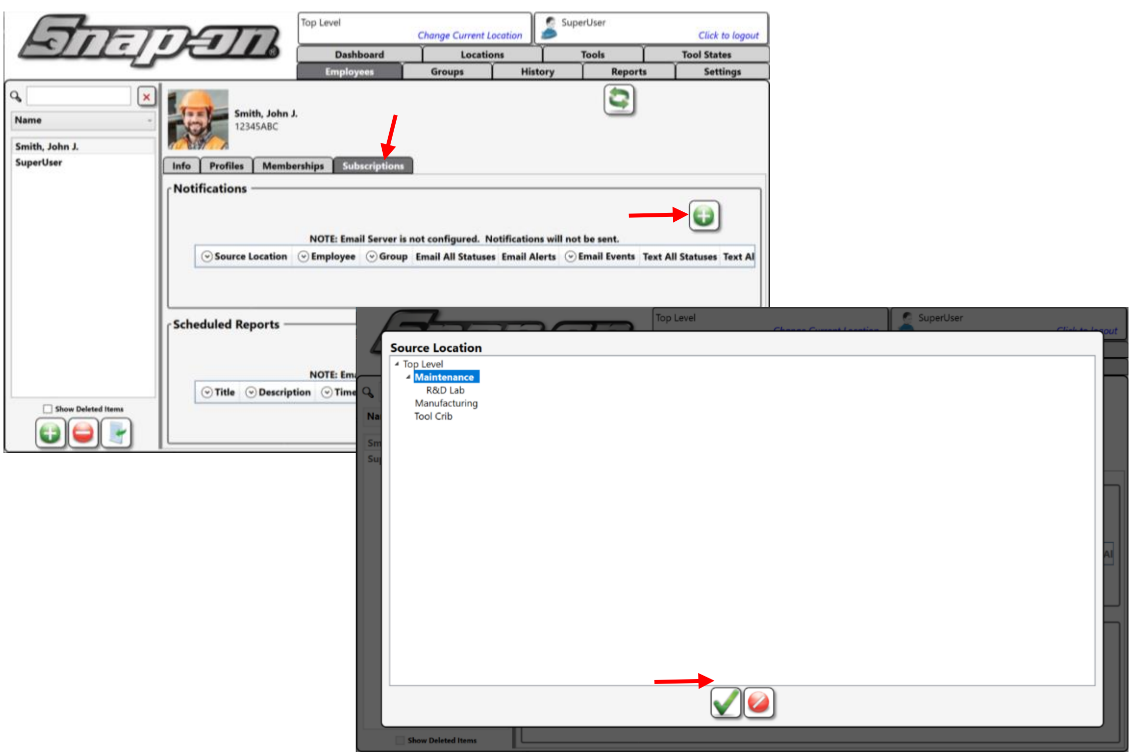
> **NOTE: Subscriptions require a status to be applied to a tool or device before a message is sent. For more information, please see the Status Types section of this guide.**
>
> **Also, you will need to have configured the SMTP settings on the service and have an active connection to the chosen STMP server. For more information, see the Network Settings section of this guide.**

Create a Subscription

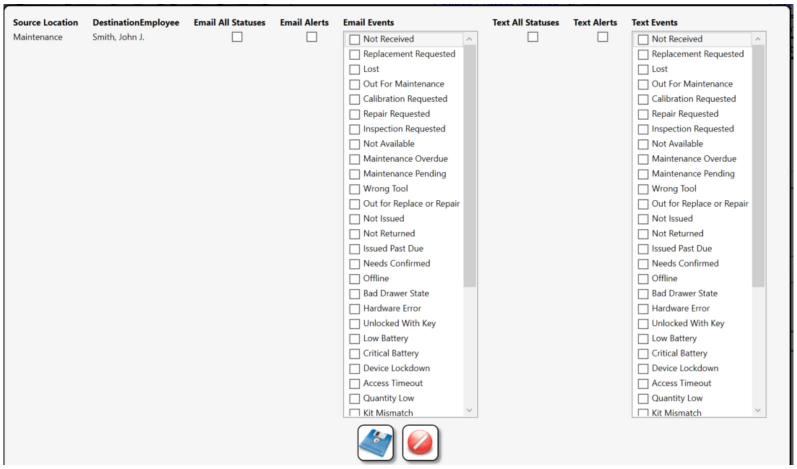
Like Profiles, there are three methods you can use to create a subscription: **Employees**, **Groups**, and **Locations**. When you create a subscription from the Employee or group screen, you will be prompted to select a location that the Subscription will monitor. Any events that cause status to be 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 ✓ button to continue.



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



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

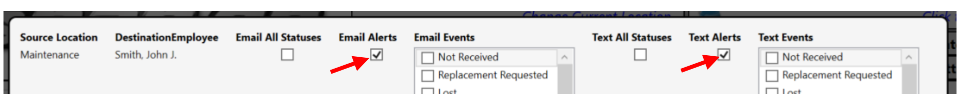
The three methods are:

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

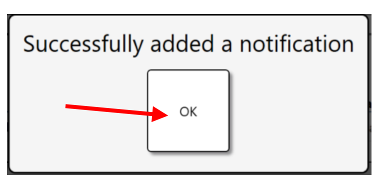
E-mail/Text Alerts – You will receive an e-mail or text whenever a status is flagged on a tool, and the behavior of the status is set to **ALERT**.

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.



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

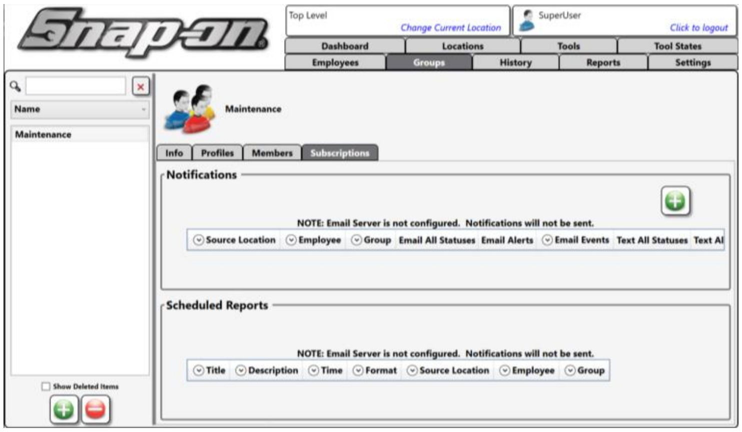


Now you should see the new **Subscription** in the Notifications section of the screen.

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

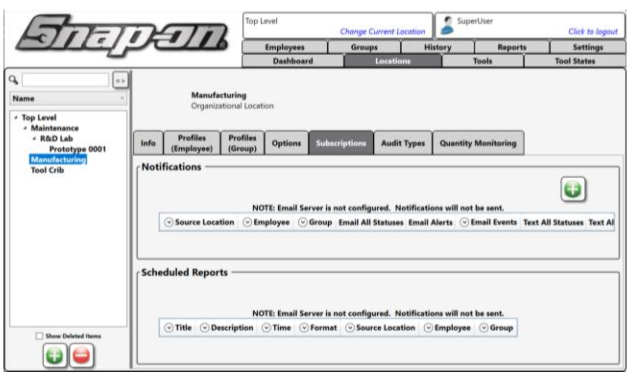
The group method is identical to the Employee method, except you access the Subscriptions Tab on the Group Information screen. Anytime you add a subscription to a group, all group members will receive the messages.



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.

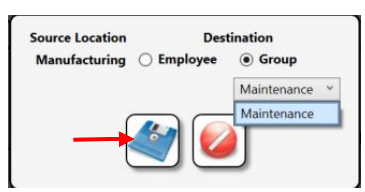
Location Method

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.



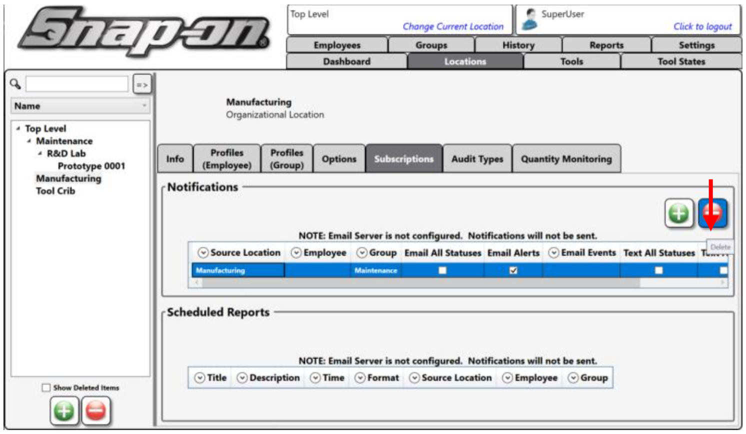
In the Subscriptions tab on the Location Object information screen, click on the + to create a new **Subscription**. You will be presented with a dialog to select if you want the Subscription to apply to an **Employee** or **Group**.

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**.

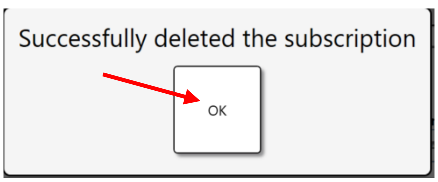


Delete a Subscription

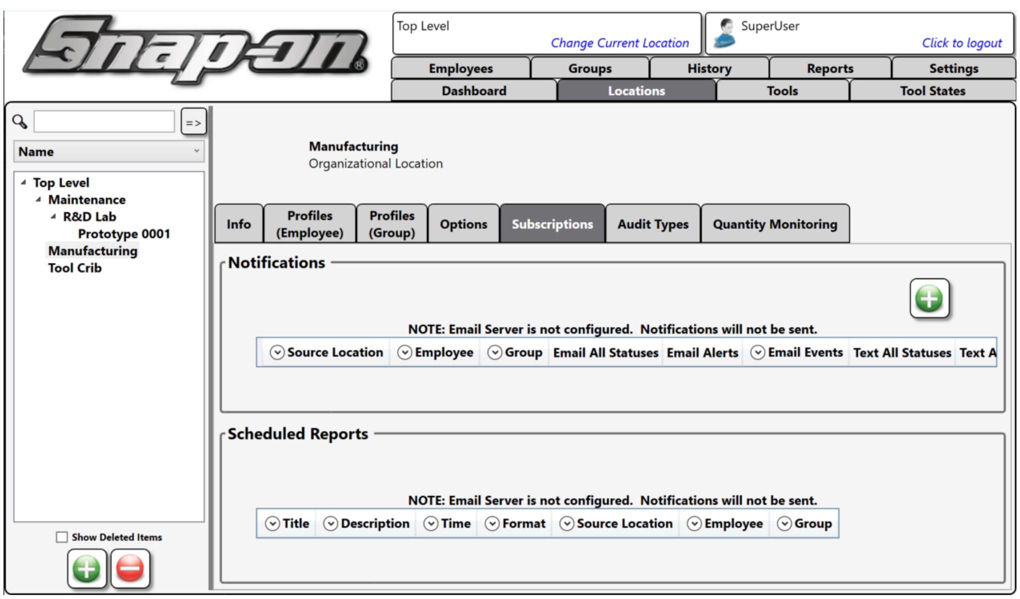
When a Subscription is no longer needed, you can delete it. Go to the Subscriptions Tab of either an Employee, Group, or Location. Select the Subscription you want to delete, then click the DELETE button.



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



The Subscription will no longer be listed.



Tools

Overview

In L5 Connect™, 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™ 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™, **Issue Behavior** determines the type of tool and how L5 Connect™ 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.

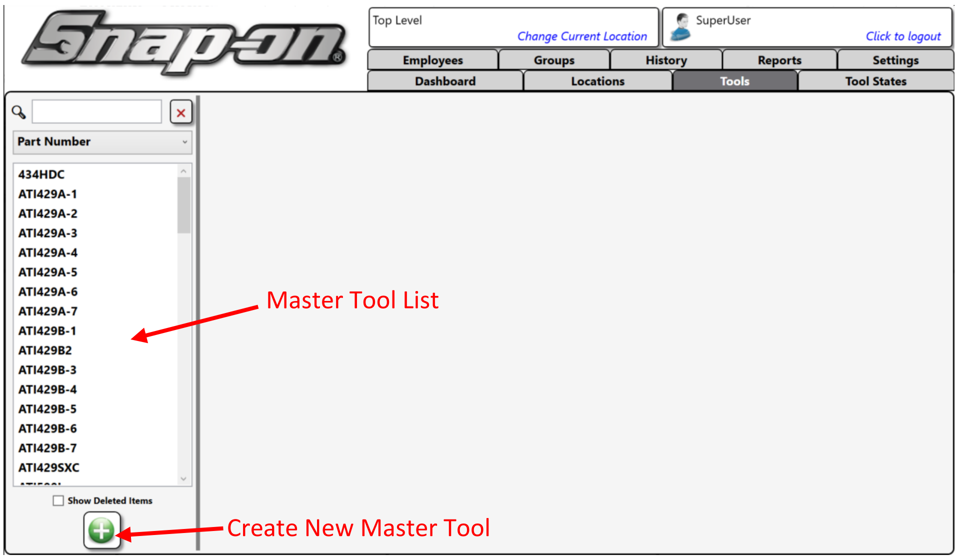
Customer ID – a unique alphanumeric number set by the user to ID the tool instance
Serial Number – the serial number of the physical tool the Instance is being created for
Tag – if the Barcode for the **Instance** is different from the **Master,** it will be defined here
Home Location – The zone on the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

Adding Tools

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

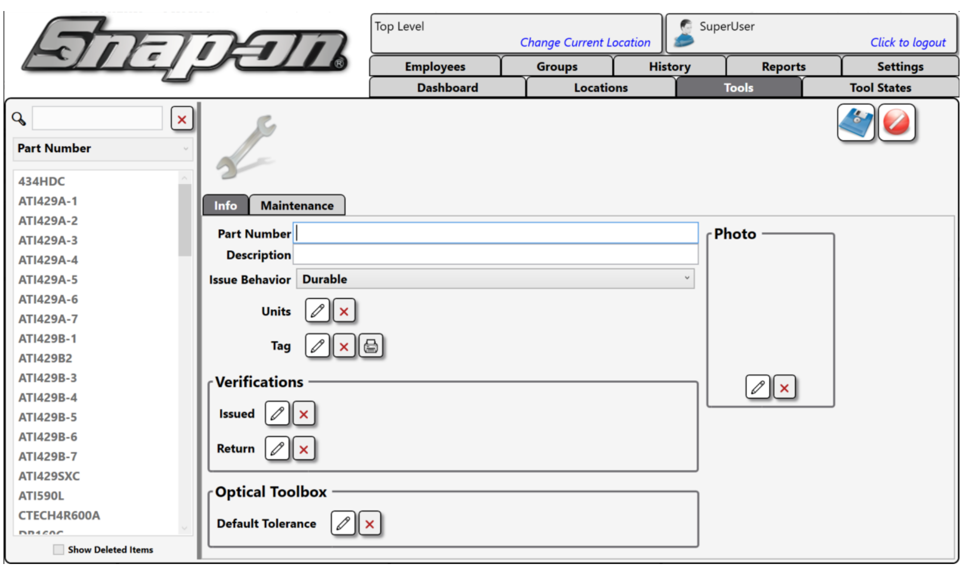
Durable

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.



NOTE: ATC Devices automatically add their tool inventory to the system when they join the service, so you do not need to create tools for it.

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

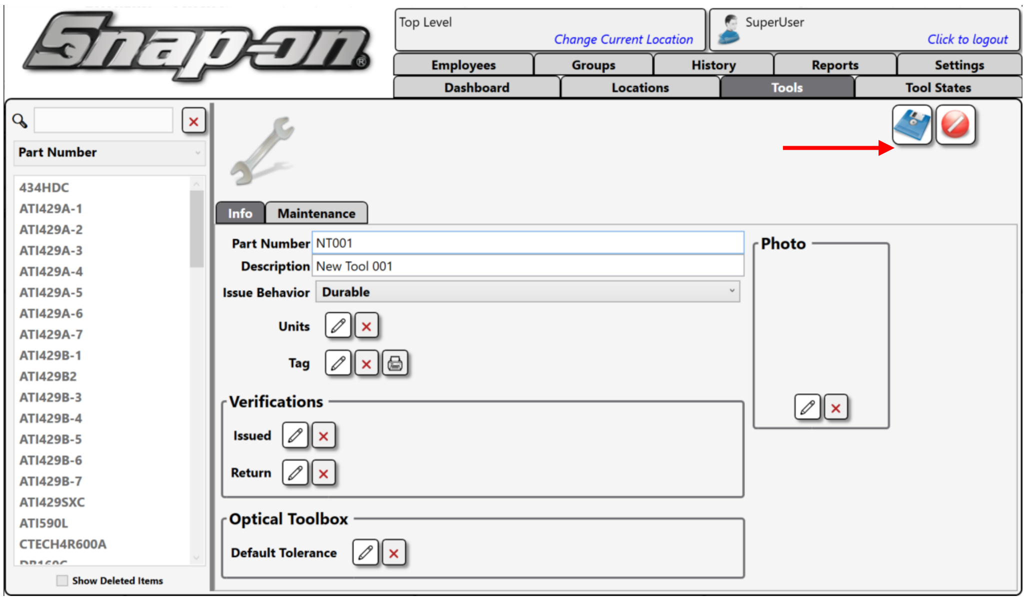


NOTE: For importing a tool list into True-Crib™ see the True-Crib™ Users Guide.

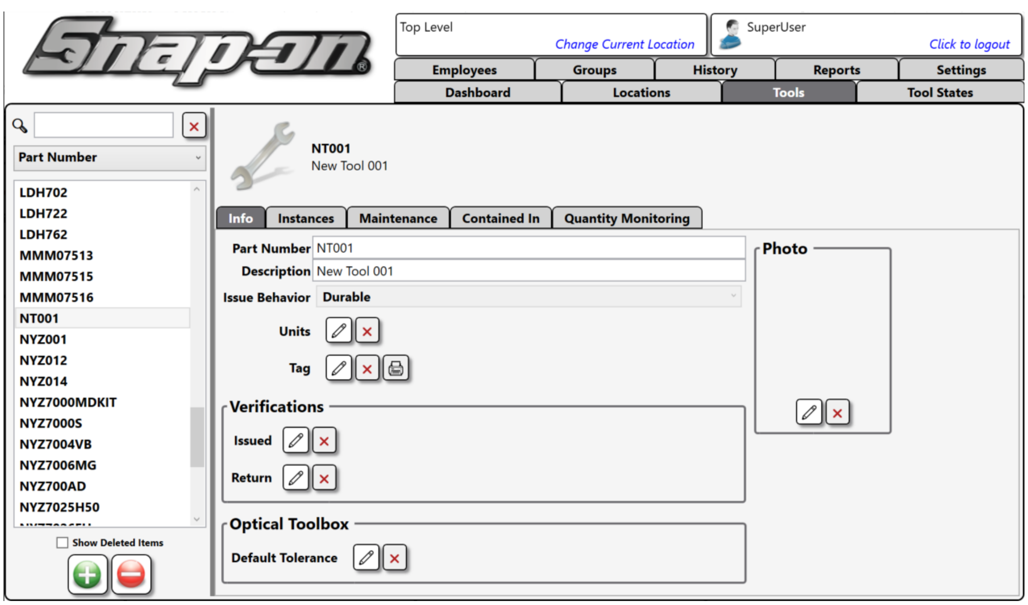
You want to add a tool with the following properties :

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.

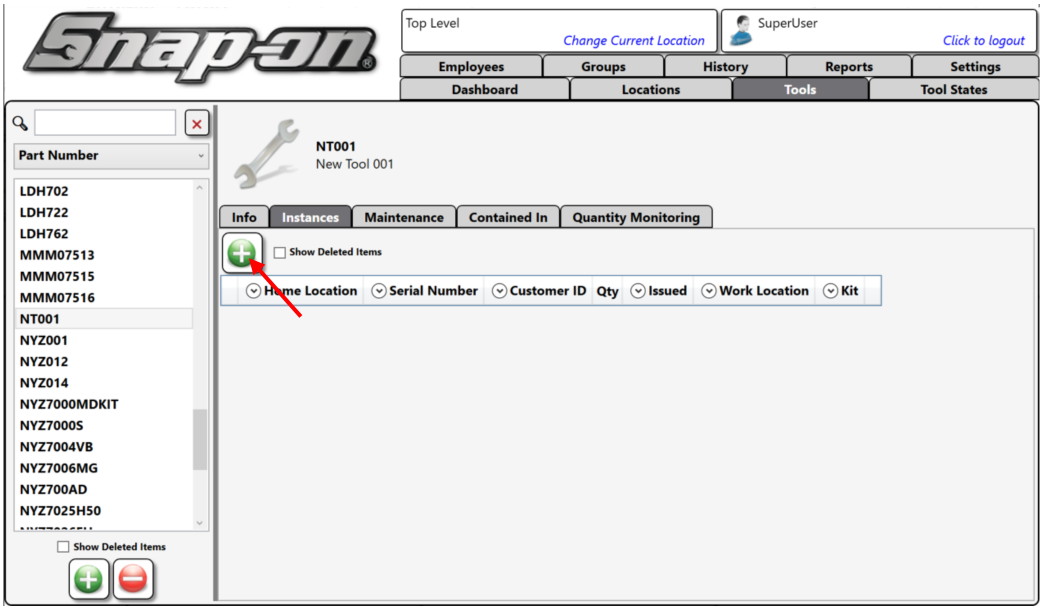


It will now show in the list of Master Tools

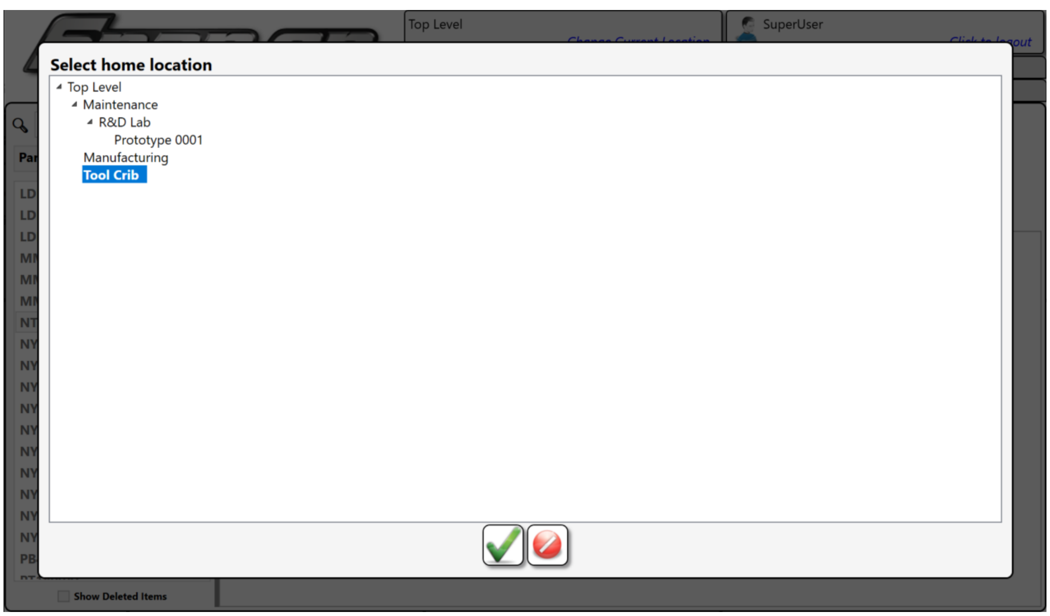


Now that you have the **Master** created, you need to add an instance of the Master tool to our crib so that you can issue them out to Employees.

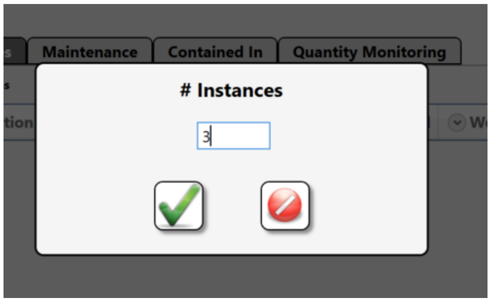
Click on the Instances sub-tab to bring up the Instances screen. Click on the button to create a new Instance.



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

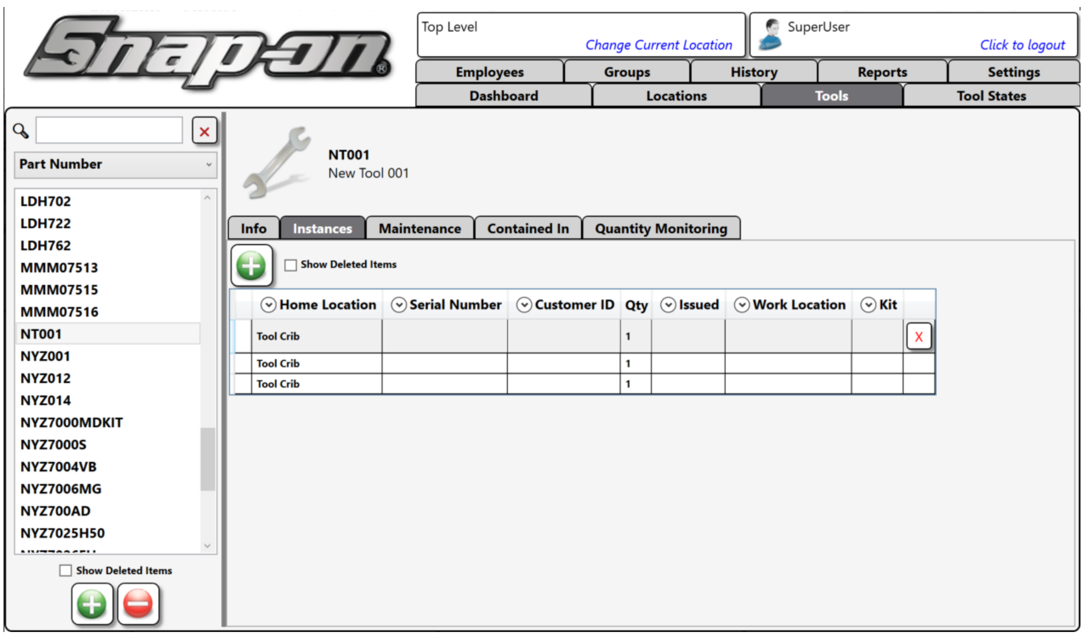


The system will then ask you how many instances you want to create. You want to make 3. Click the ✓ button to continue.



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.



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.

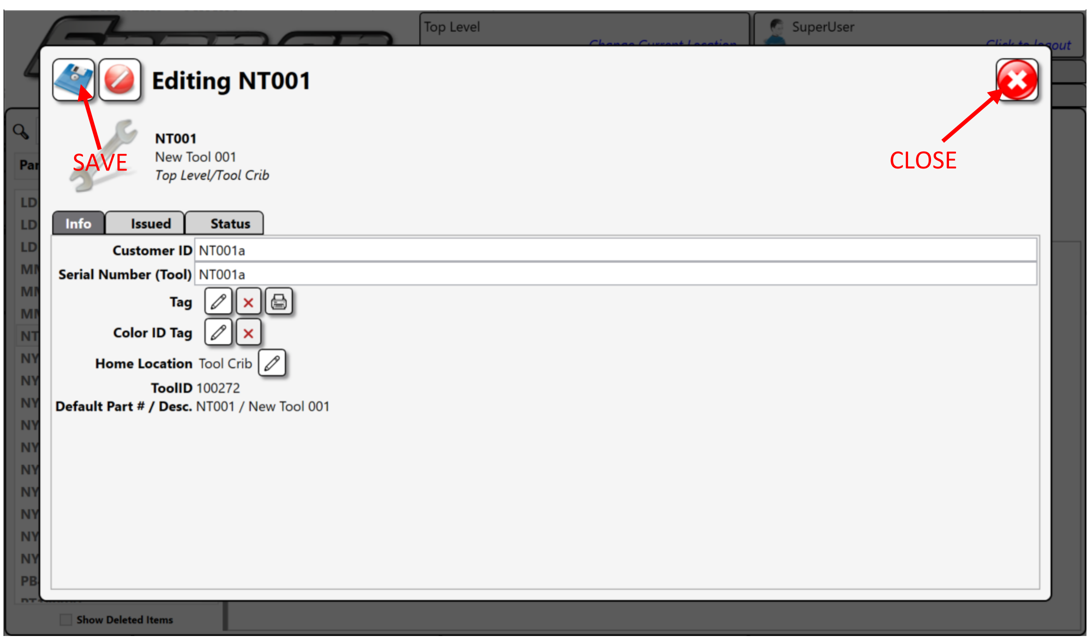
NOTE: When a tool instance is created, a ToolID will be assigned to it by the system. This is a unique internal tracking number that is used to identify a specific tool instance and allows for tracking and historical forensics within the system. You cannot change a ToolID. It is recommended that when 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.

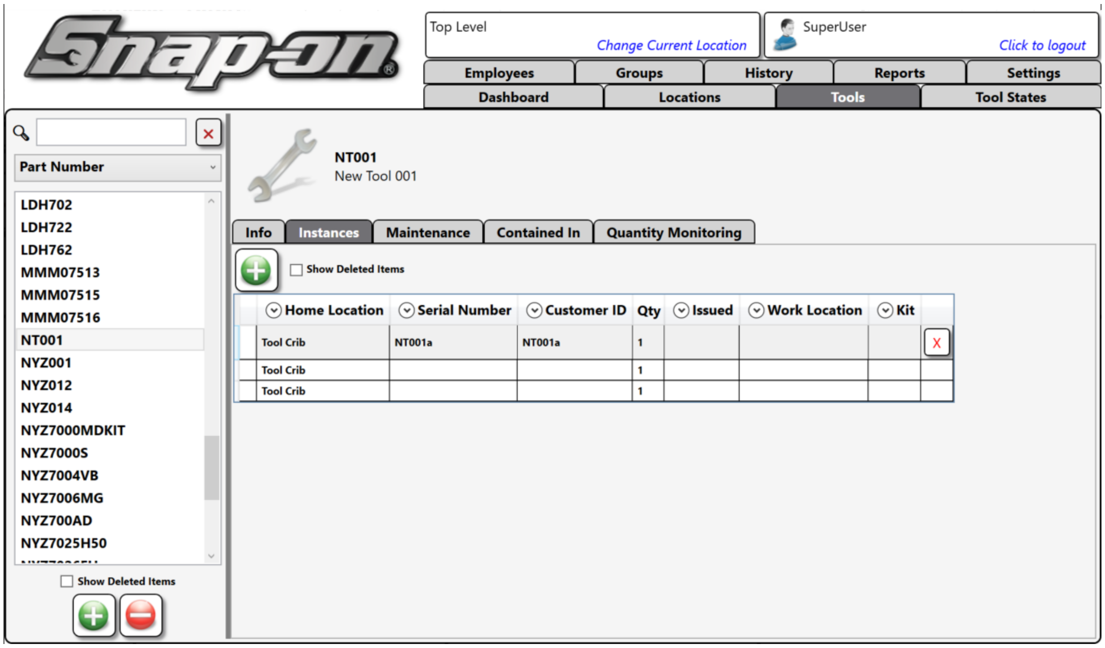
You can define the Instance with the following information

Customer ID – NT001a
Serial Number – NT001a

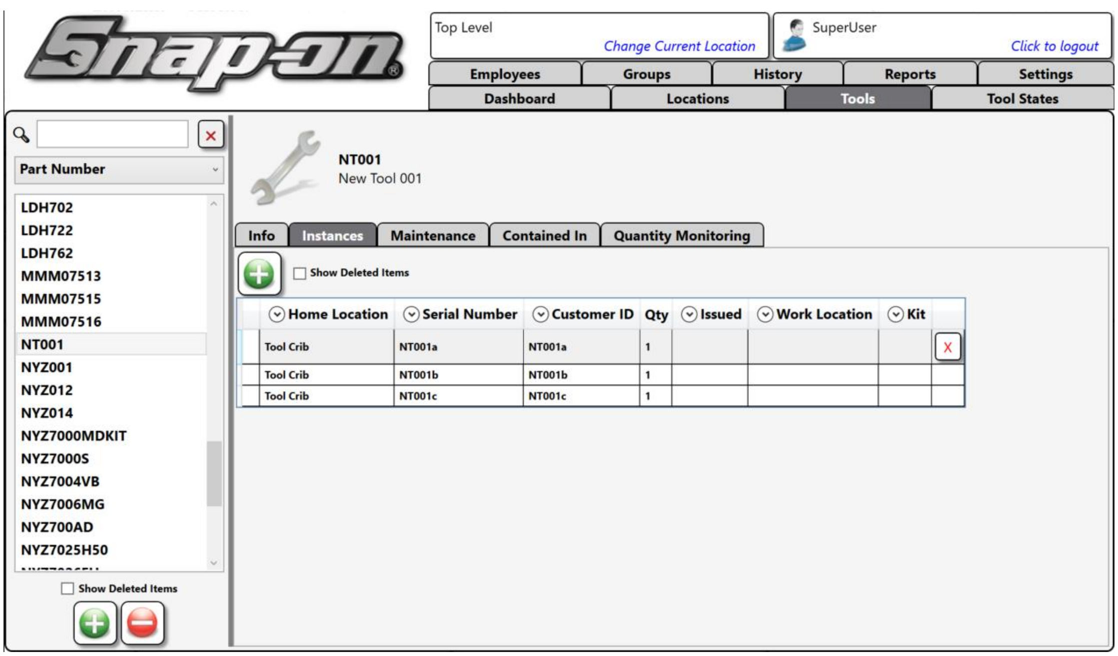
You can click on the SAVE button to save the changes to the Instance, then click the CLOSE button.



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



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



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

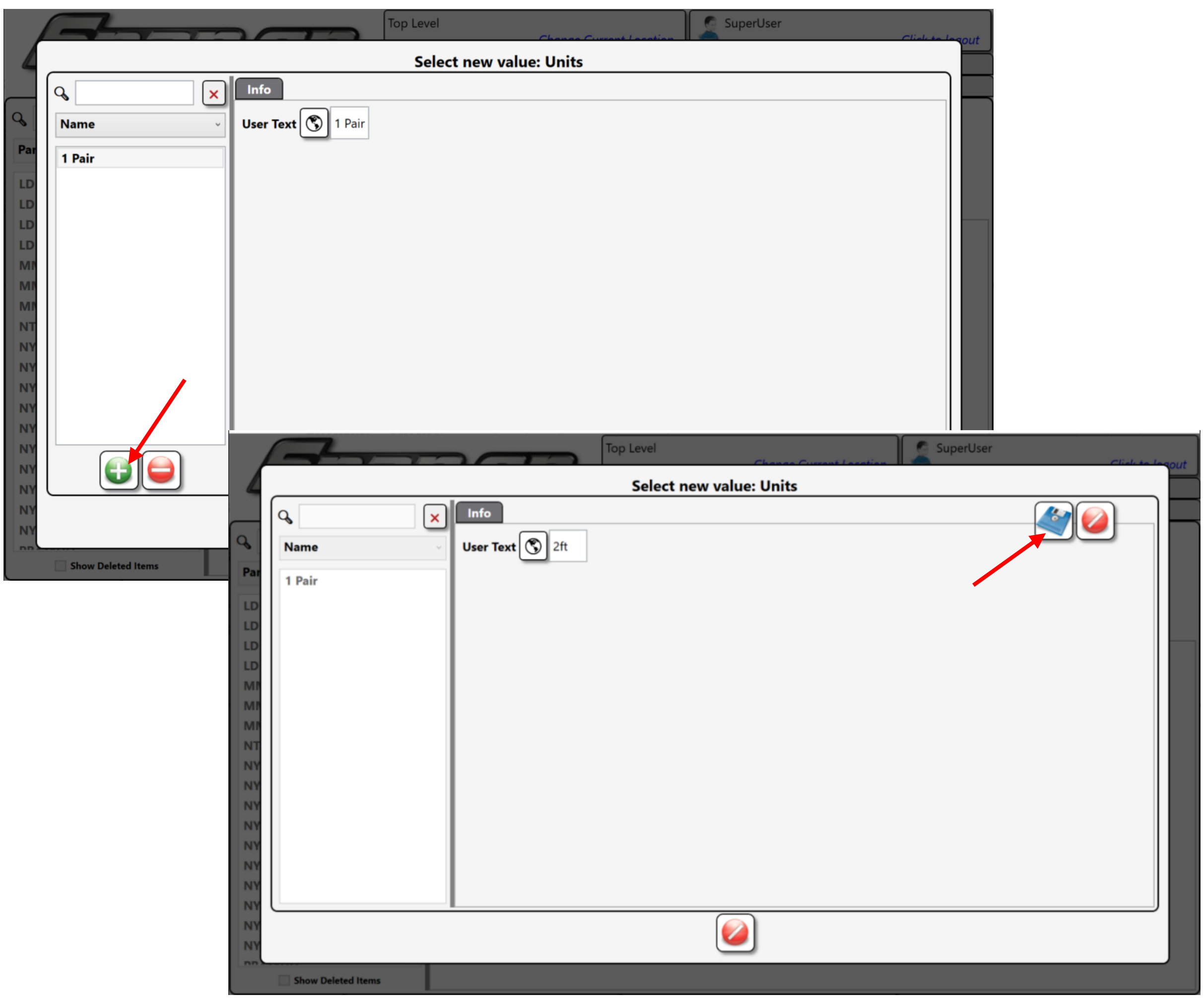
Consumables & Returnable Consumables

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.

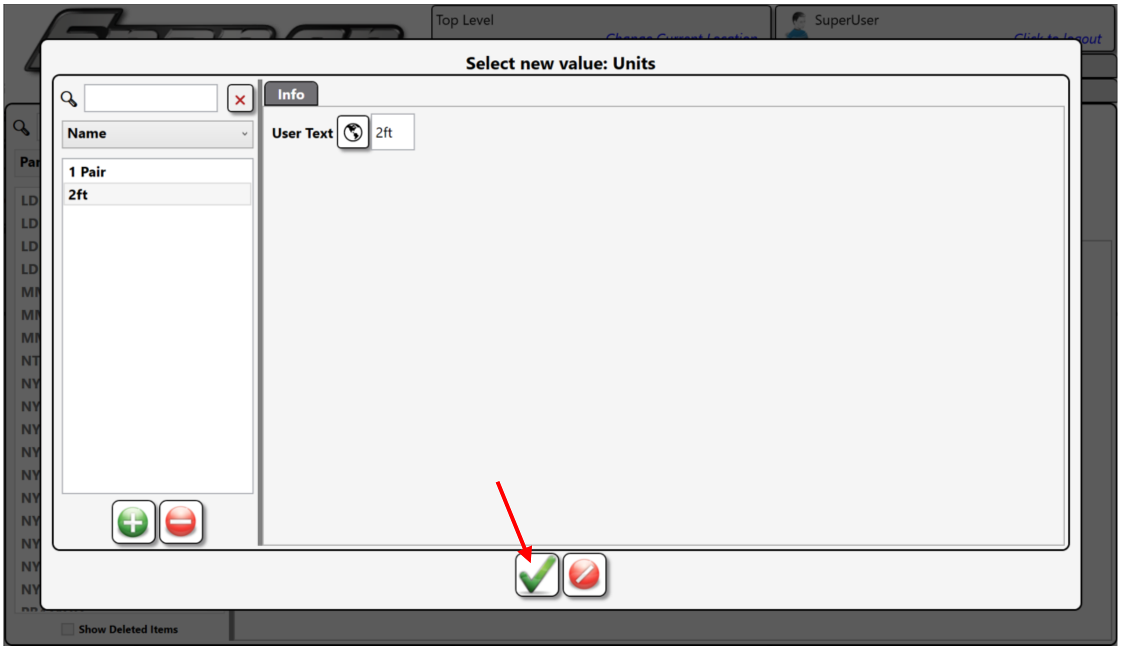
Like before, the first step is to create a Master tool for the Consumable.

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.

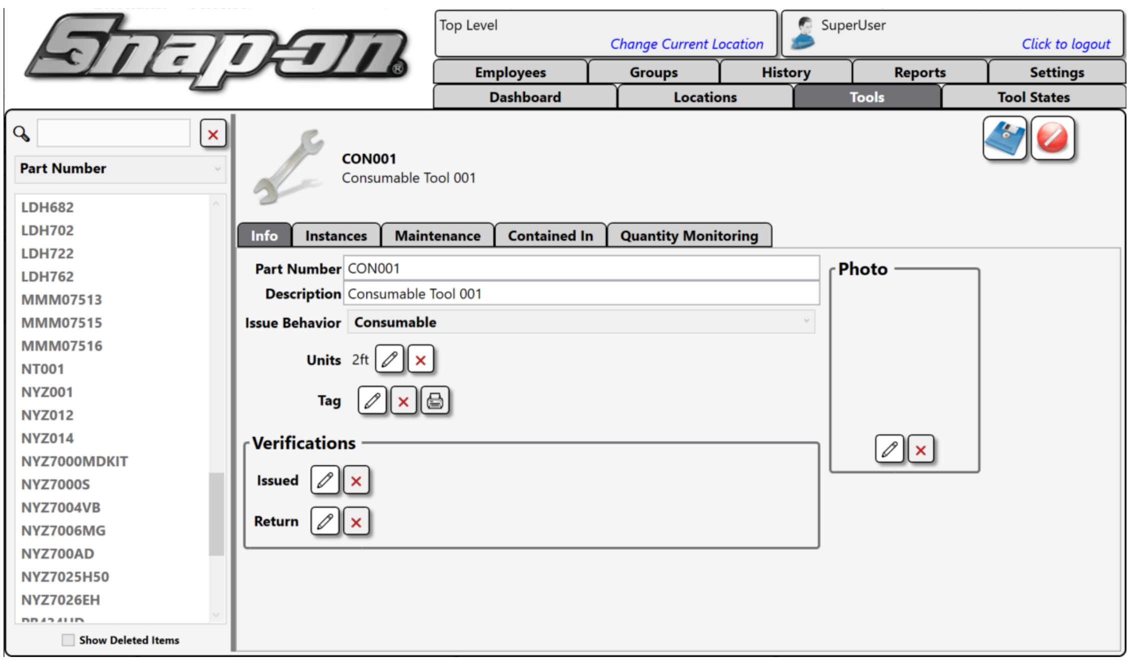
To create a unit, click the button next to Units. This will display the Units screen. All units are global and, once created, can be used with any tool master in the system. Click on the NEW Unit button on the bottom Left Side. Then type in the name of the Unit and click the SAVE button.



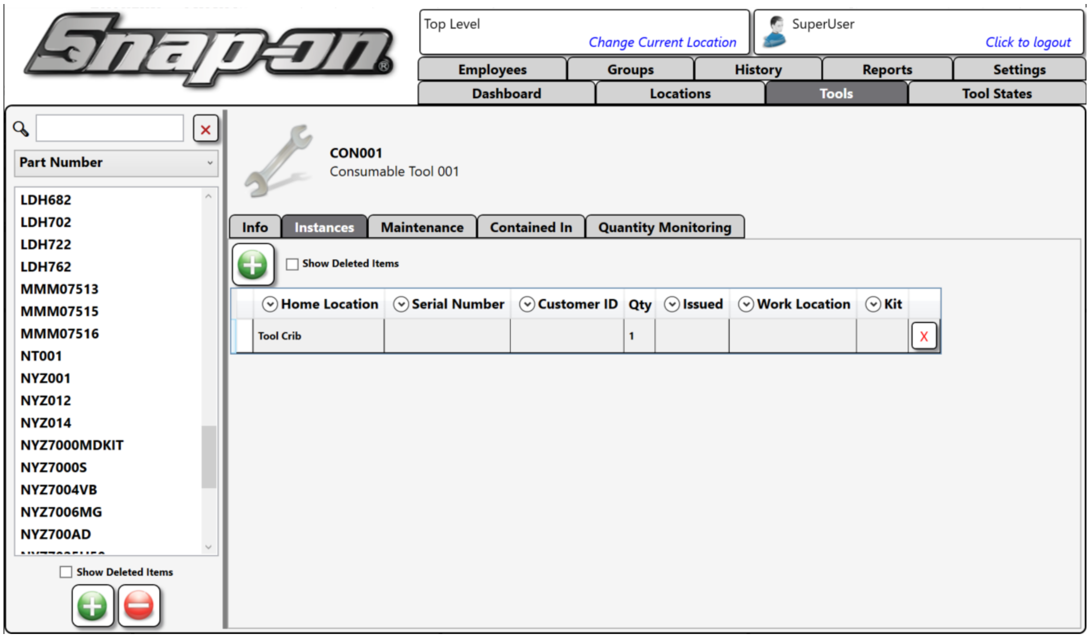
Click the ✓ button at the bottom of the screen when done.



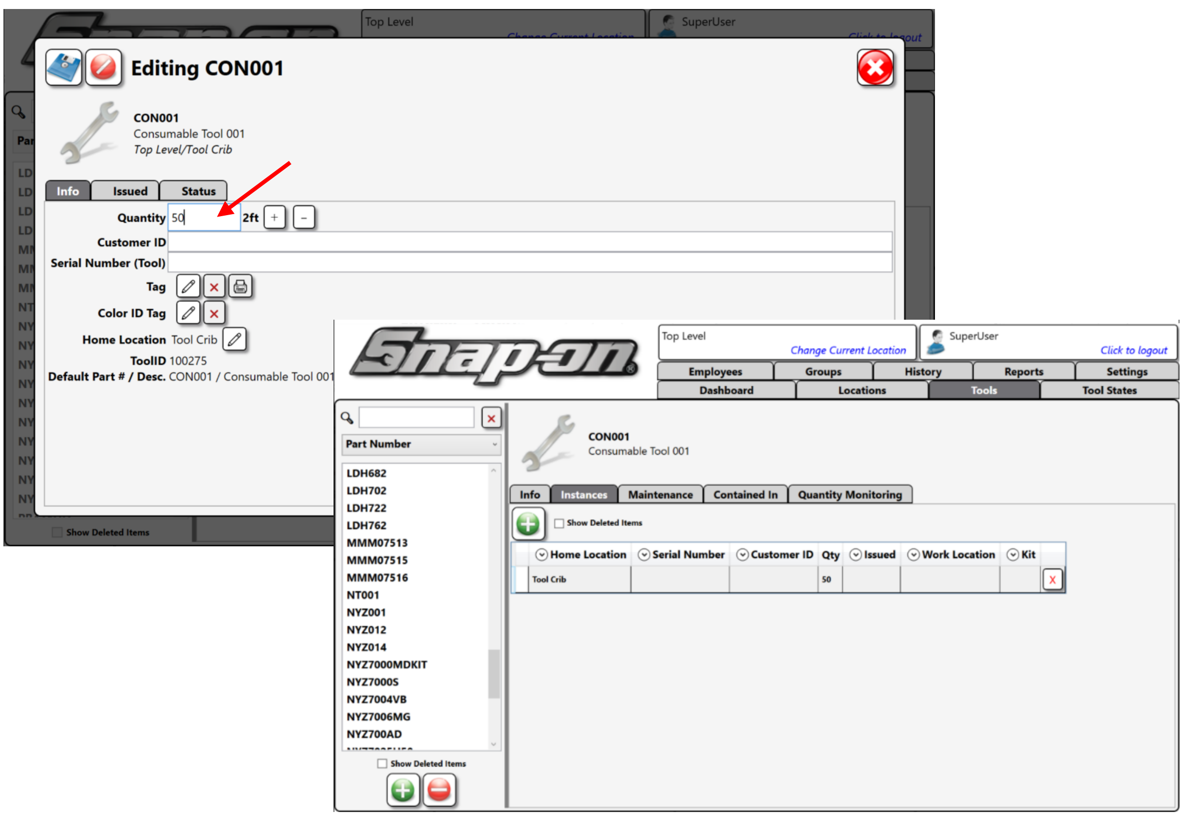
The Unit will now be assigned to the Master Tool.



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



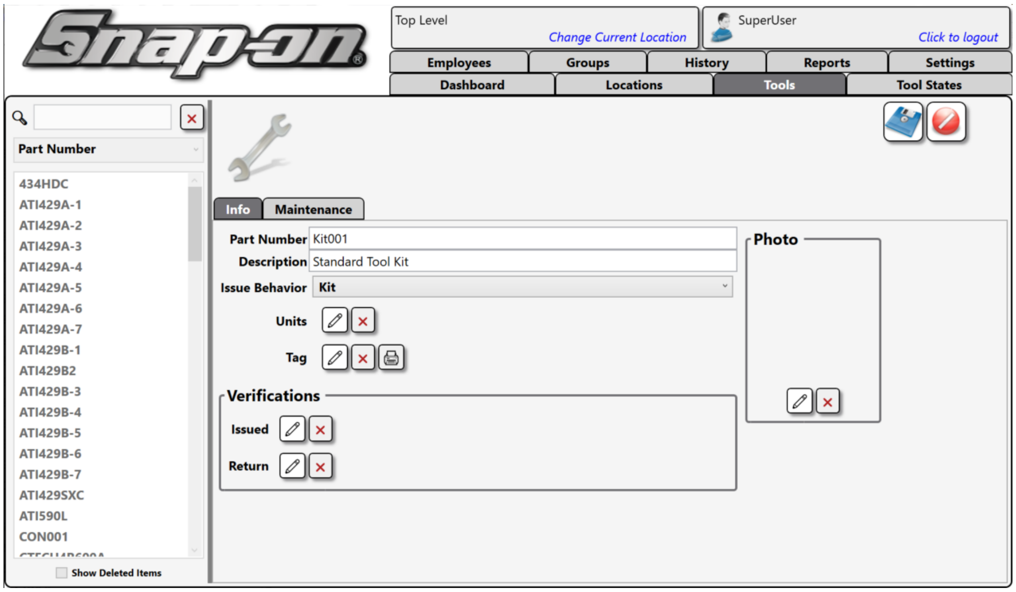
In the instance properties, set the Quantity to 50. Save and Close. The Quantity is now listed in the instance list.



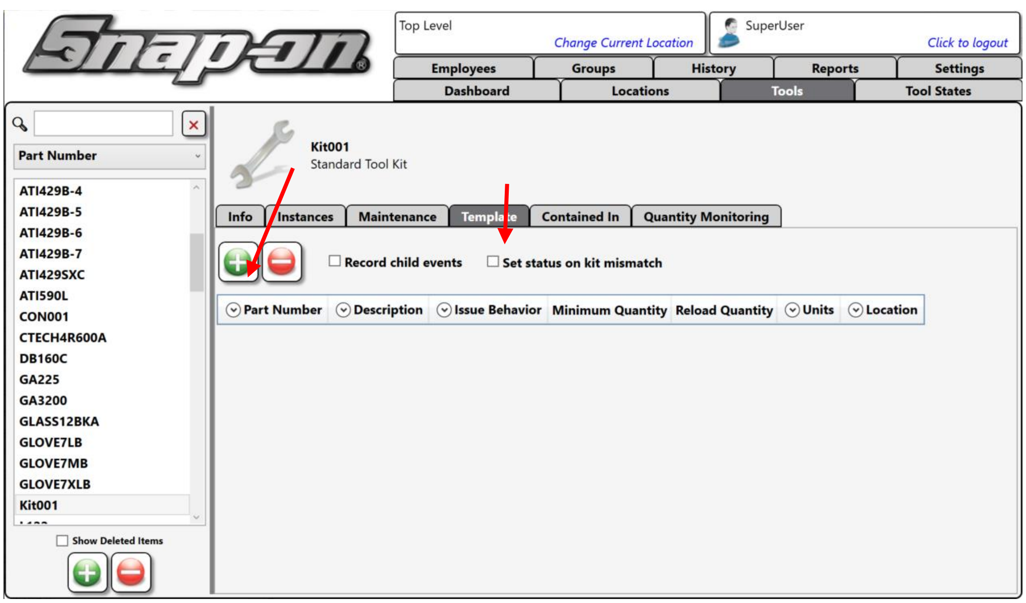
Tool Kits

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.

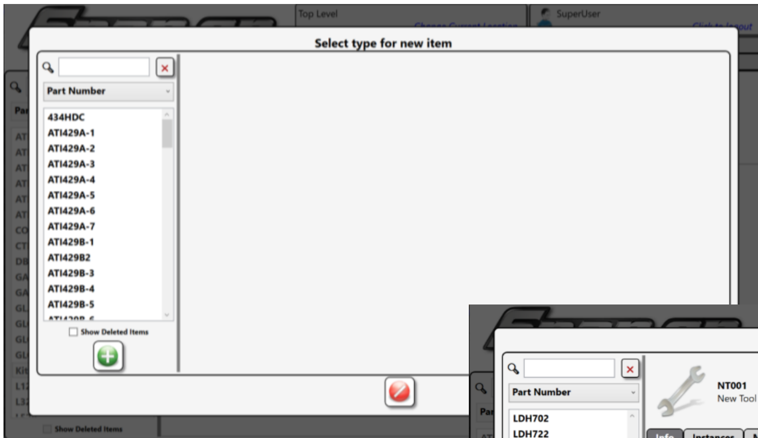
To create a toolkit, you need to create a new Tool Master and set the behavior to Kit. Name this new master tool, **Kit001**. Add the description, **Standard Tool Kit**. Save the Tool Master.

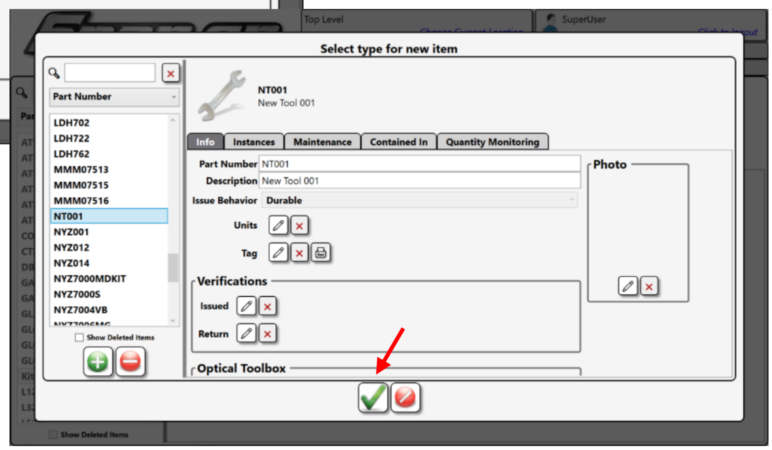


Now add the tools that will be included with the kit. Click on the **Template tab,** then click on the **Green +** symbol to add a new tool.



You will then be presented with a list of the master tools managed by the system. Find the tool you want to include in your kit. For this kit, select **NT001** and click on the ✓ button to add it.

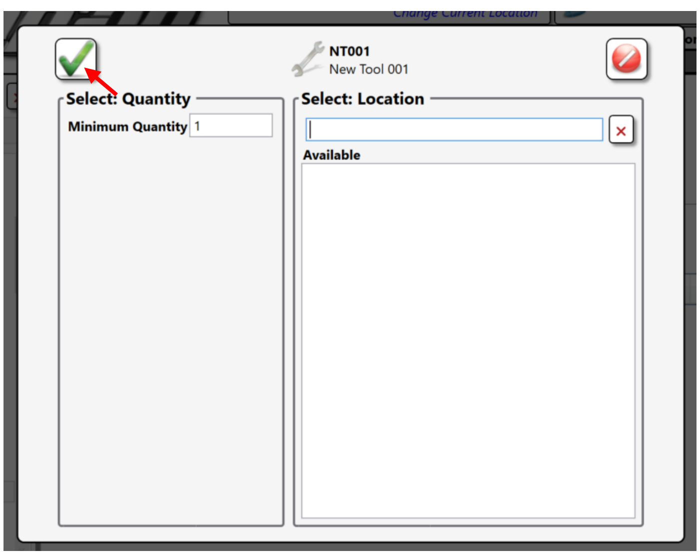




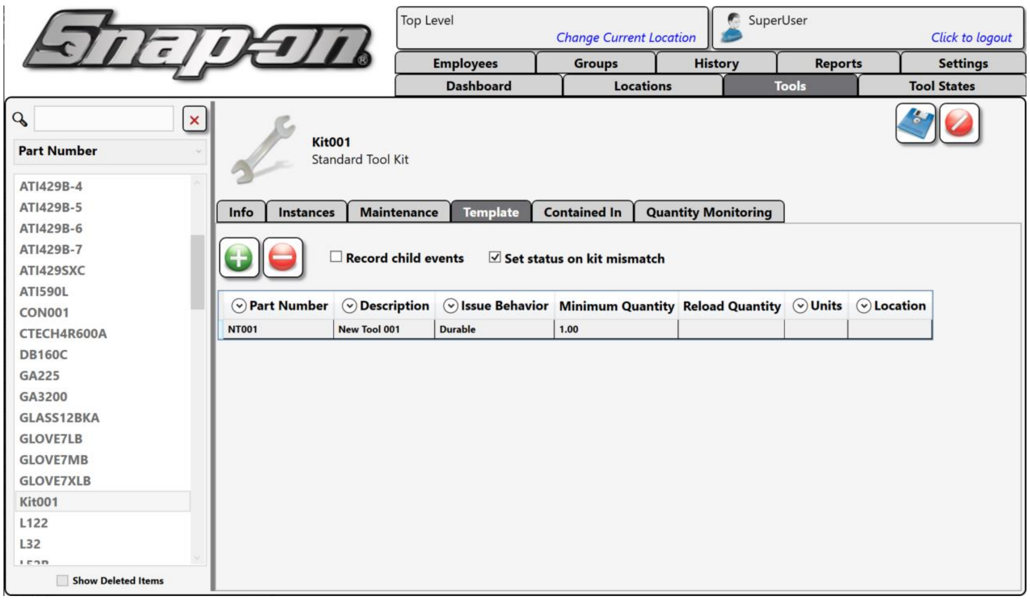
NOTE: Just like with normal Tools, Kit Tools have a MASTER and instances. If the tool you want to add to the kit is not in the list, you will need to create a new MASTER for that tool.

Once you have selected your tool, the system will ask how many of the tools you wish to add to the kit. Also, If the kit has specific locations like drawers or pouches, you can add those.

Add one Instance of this tool it doesn't have a location, click on the ✓ button.

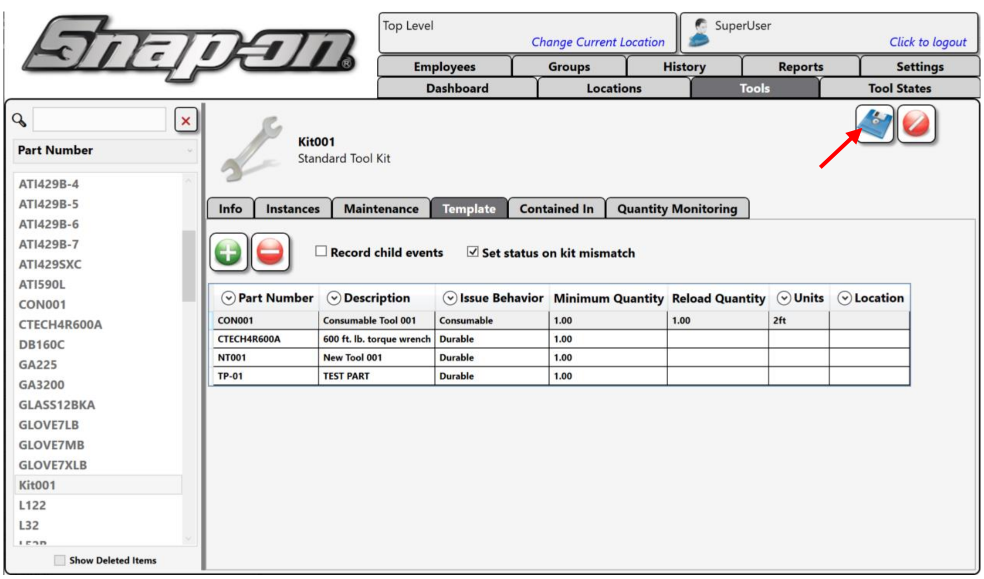


You should see the tool listed in the Template.



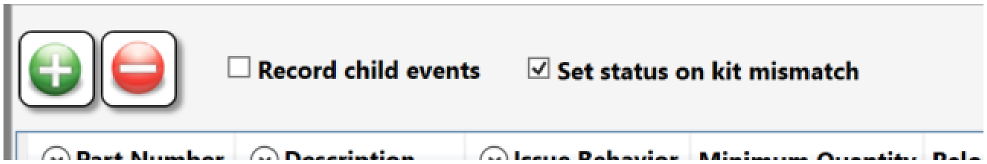
NOTE: Adding a tool to a template does not create an instance, like a master tool, a template is just a blueprint of what the kit is supposed to contain. When you create an instance of the Kit, you will be given the option of moving an existing instance of the child tool to the kit or creating a new one.

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



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

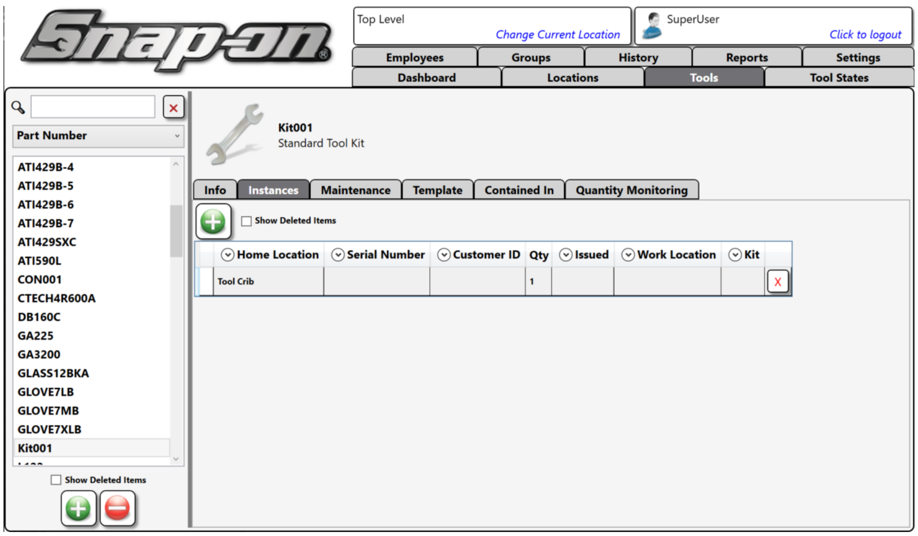
Once created, you have options at the top of the Template tool list.



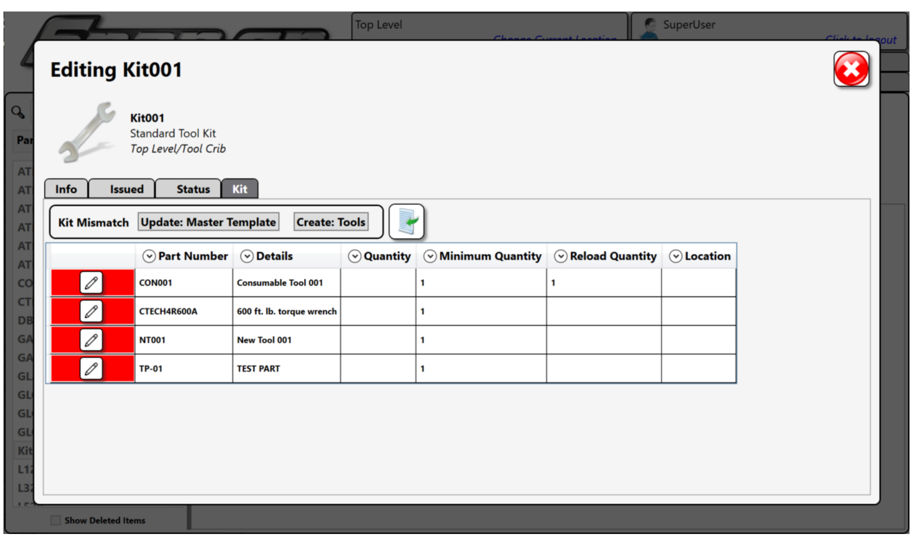
Record child events – Log events for all children of the kit and the kit itself.

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.

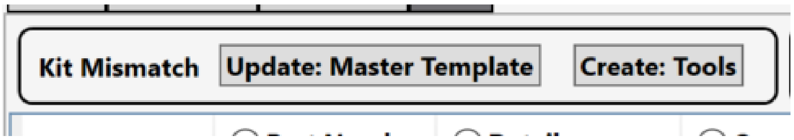
Set the options how you would like them, and create an instance of the kit in the **Tool Crib** so that it can be issued out.



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.



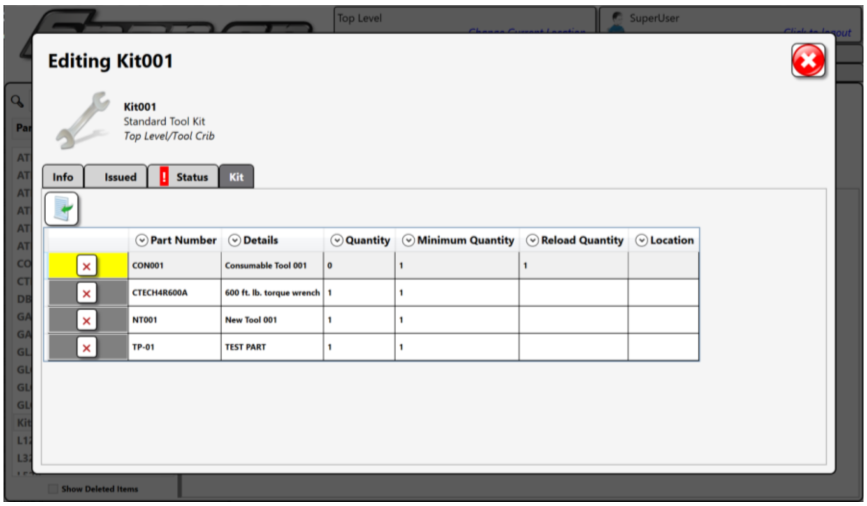
You will see a Kit Mismatch section here. You have two options



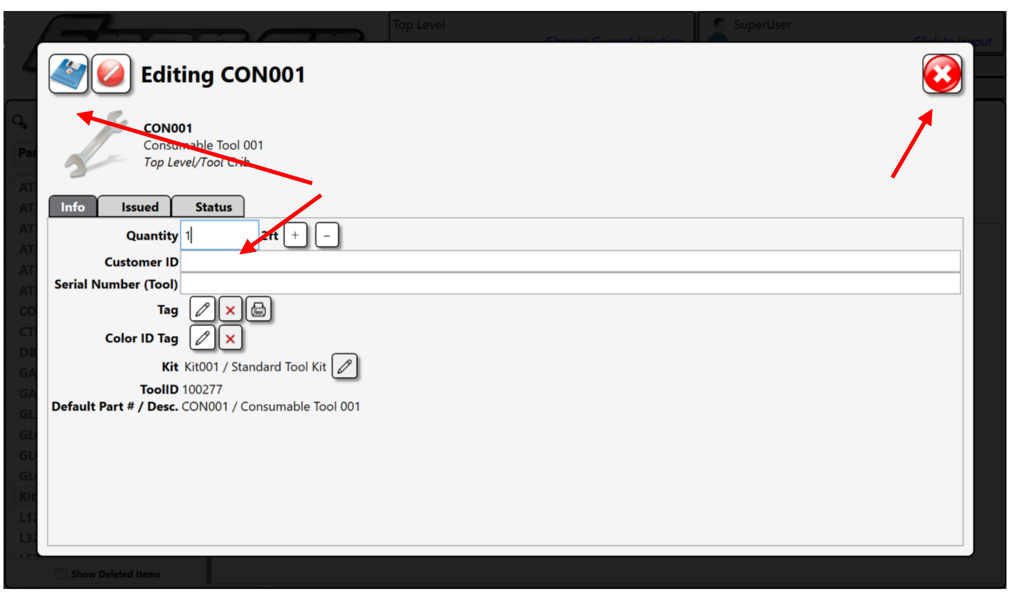
Update: Master Template – Change the Template on the Master tool based on the Instance.

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

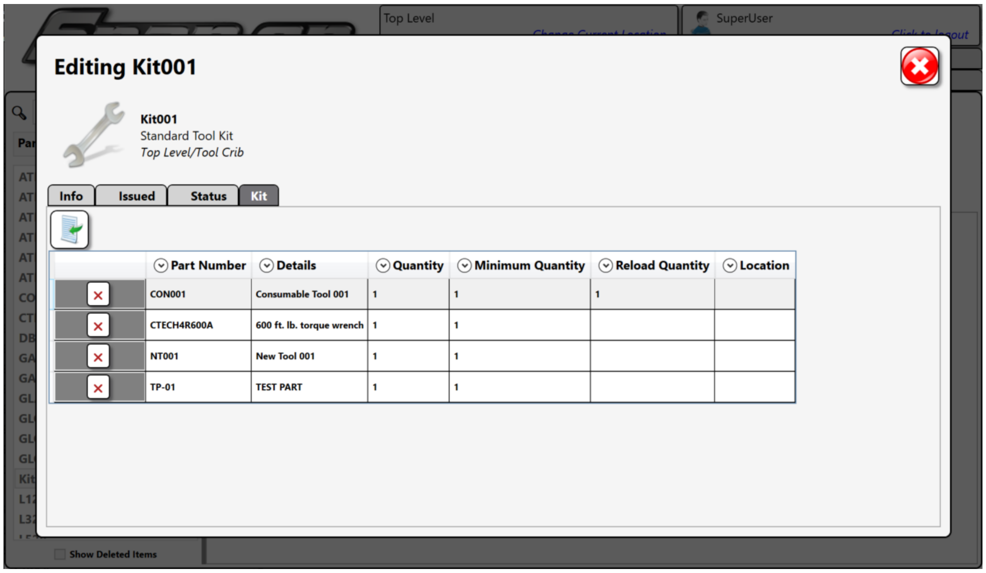
Click on **Create: Tools, and** you will see the color change from RED (Missing instance) to Grey(Present) and Yellow(Tool with a Status).



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.



The status has now been cleared.



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.

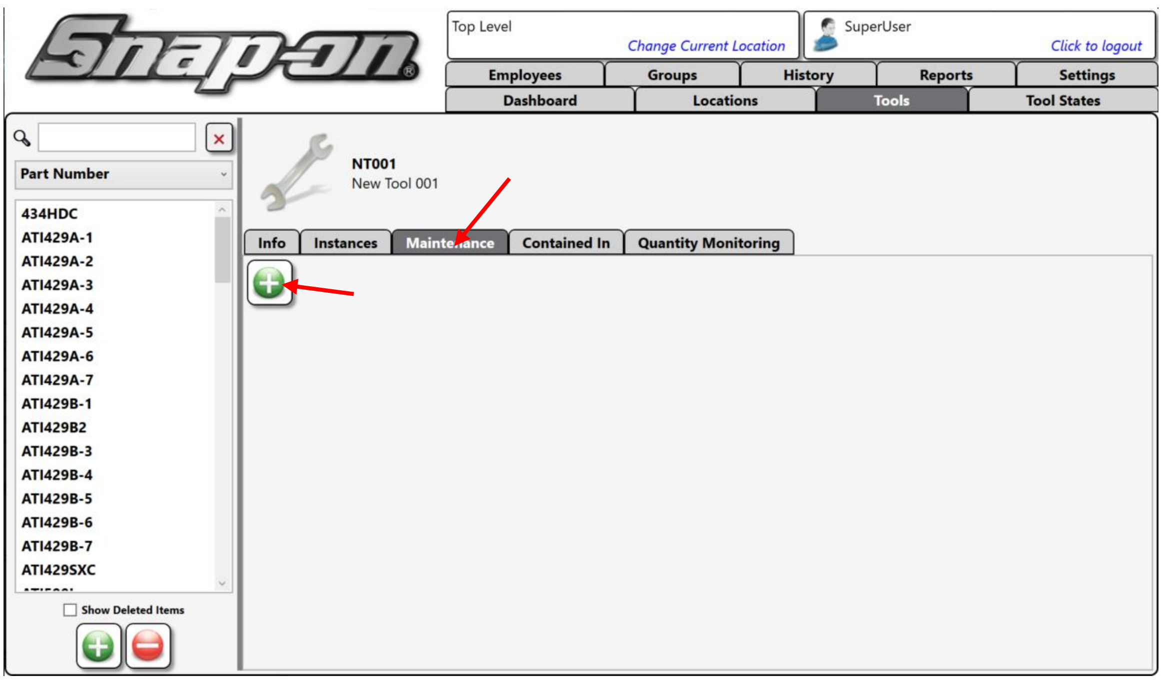
You will need to create a new Kit Master. Then create an instance of that Master. Go to the kit tab within the instance properties and use the IMPORT button. Once imported, you can then click on **Update: Master Template**. That will then push the list of tools to the Tool Master Template.

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™ 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.

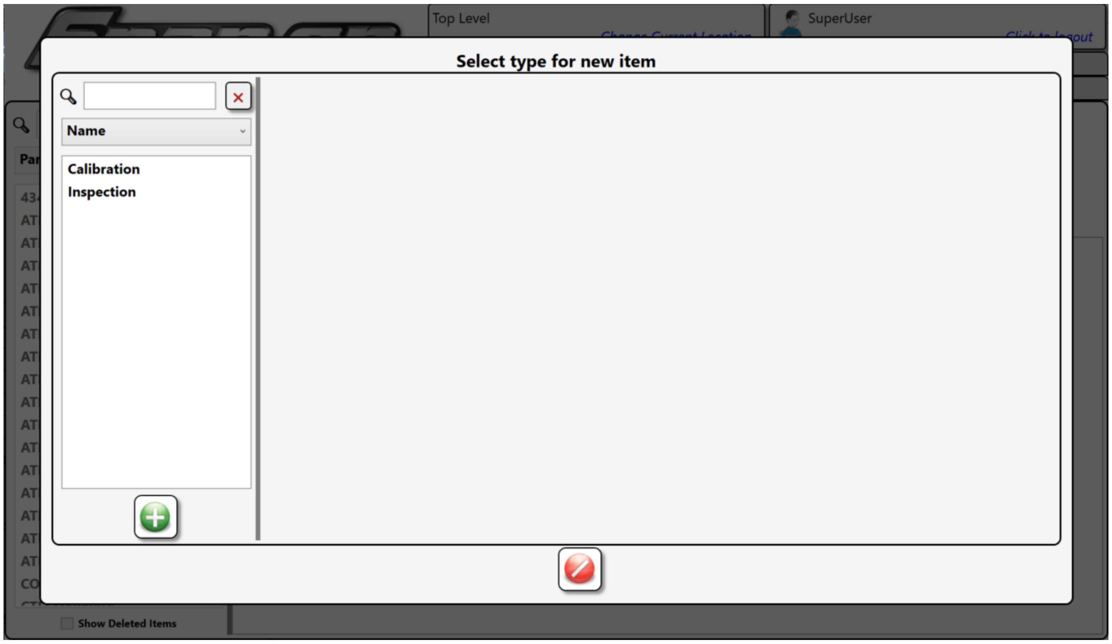


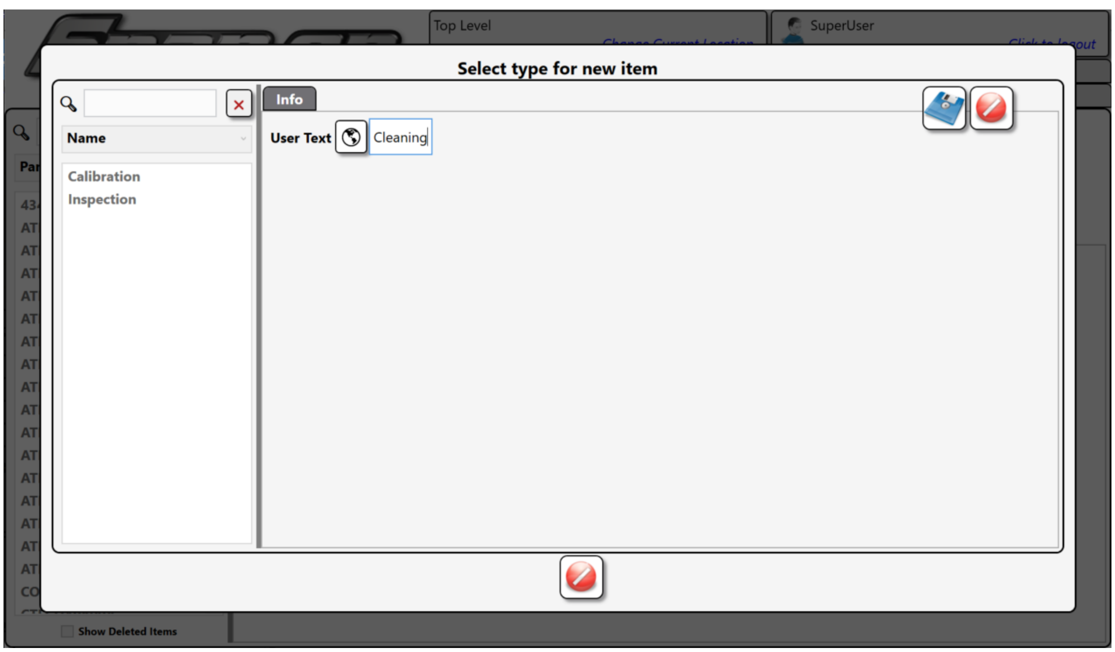
Next, click on the  button to assign a **Maintenance Type**. Two types are already added to the system on setup, Calibration & Inspection. If these do not match the type of Maintenance you want to perform, you will need to create a new **Maintenance Type**.

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 button on the left side of the screen. The **New Maintenance Type** subscreen will appear, and you will need to name the new type. Name this type as **Cleaning,** then click the SAVE button.

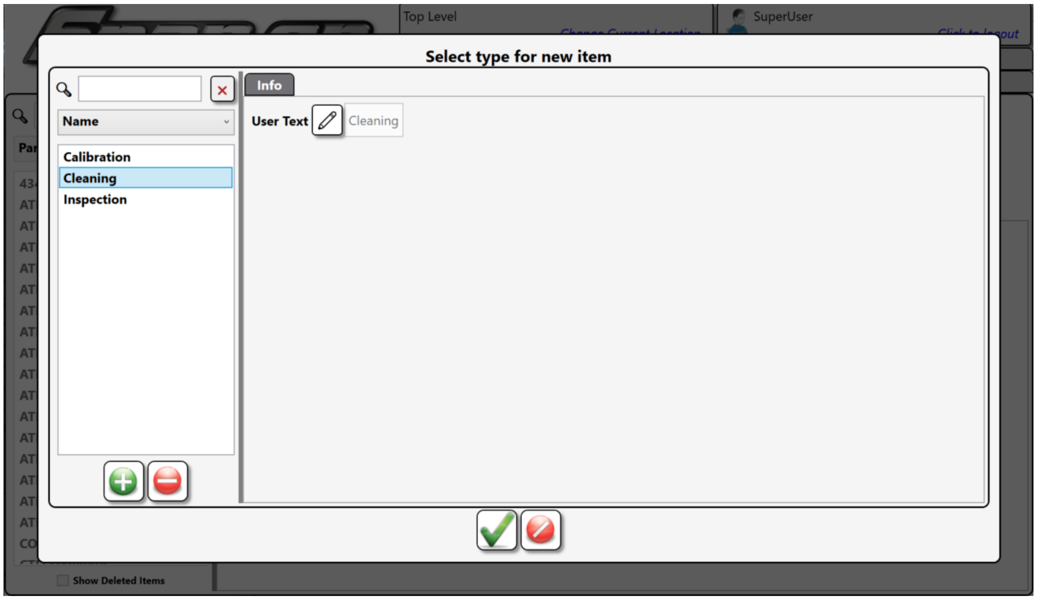




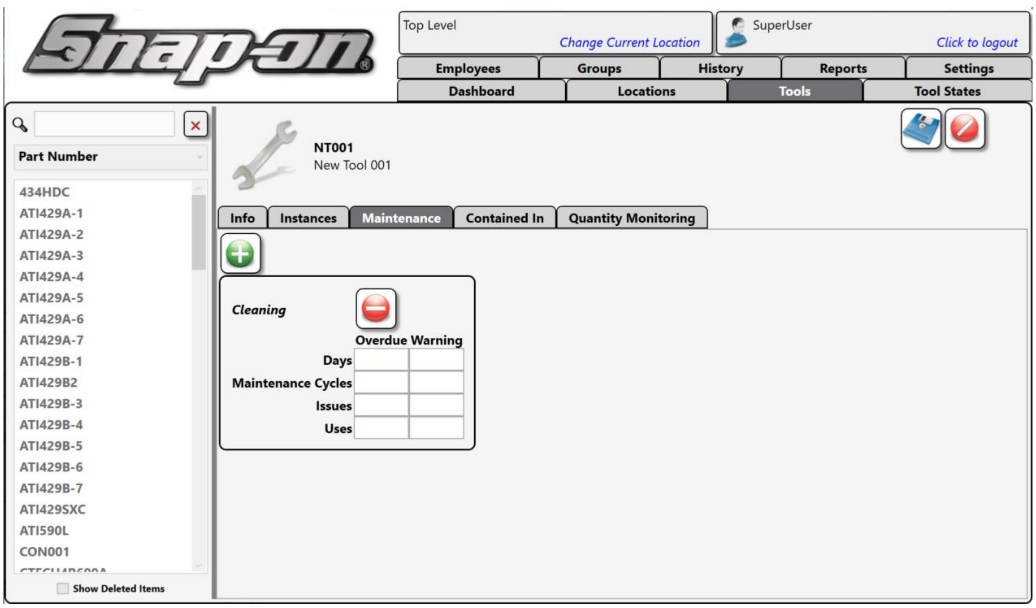
If you require a **Multiple Language Display**, you can click on the button to set the name in different languages. Click the check box and input the display text for each language.


Top Level
SuperUser
Select type for new item
Info
Name
Calibration
Inspection
User Text
Cleaning
Name Cleaning
Enable Multiple Language Display
Top Level
SuperUser
Select type for new item
Info
Name
Calibration
Inspection
User Text
Cleaning
Name
Enable Multiple Language Display
English Cleaning
Spanish Cleaning
German Cleaning
French Cleaning
Italian Cleaning
Japanese Cleaning
Korean Cleaning
Portuguese Cleaning
Chinese Cleaning
Top Level
SuperUser
Select type for new item
Info
Name
Calibration
Inspection
User Text
Cleaning
Name
Enable Multiple Language Display
English Cleaning
Spanish Limpieza
German Reinigung
French Nettoyage
Italian Pulizia
Japanese クリーニング
Korean 청소
Portuguese Limpieza
Chinese 打扫
Show Deleted Items

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



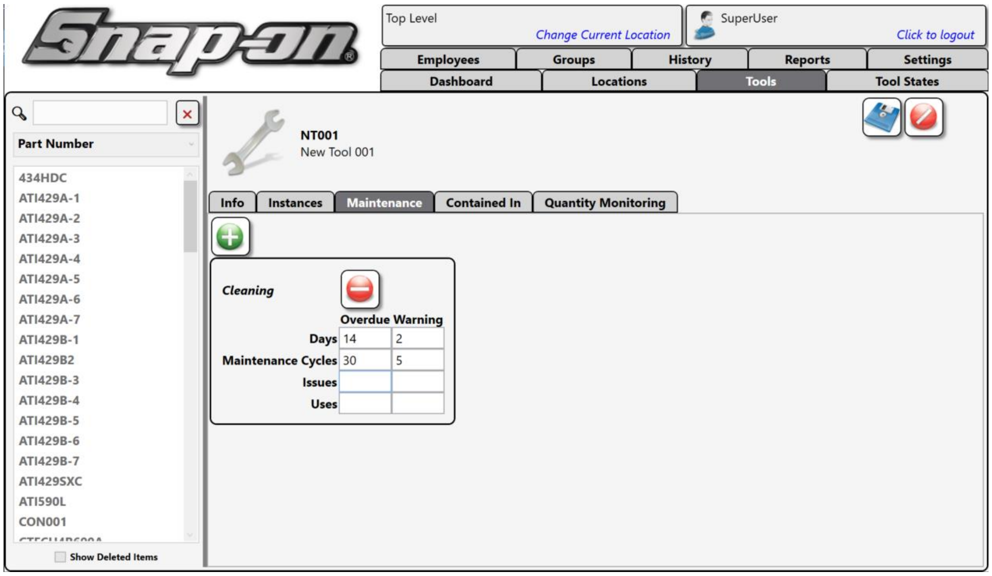
Click on the ✓ button to continue. You are now presented with a maintenance schedule.



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

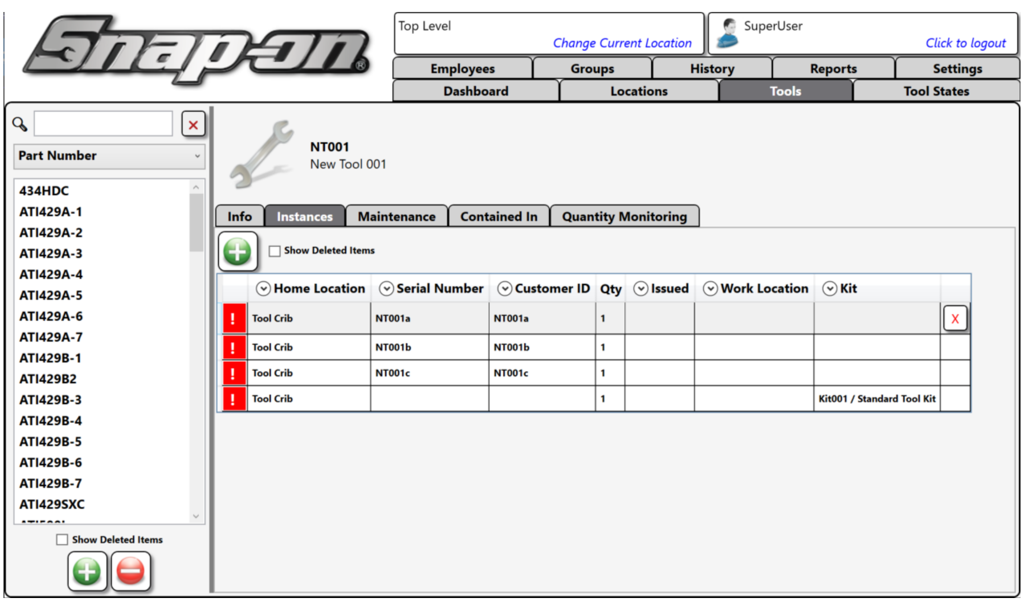
Days – Time in days until the tool is due for Maintenance
Maintenance Cycles – How many times a tool can be maintained until it needs major Maintenance.
Issues – How many times the tool can be issued for use before it needs to be serviced.
Uses – How many times a tool can be used before it is due for 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.

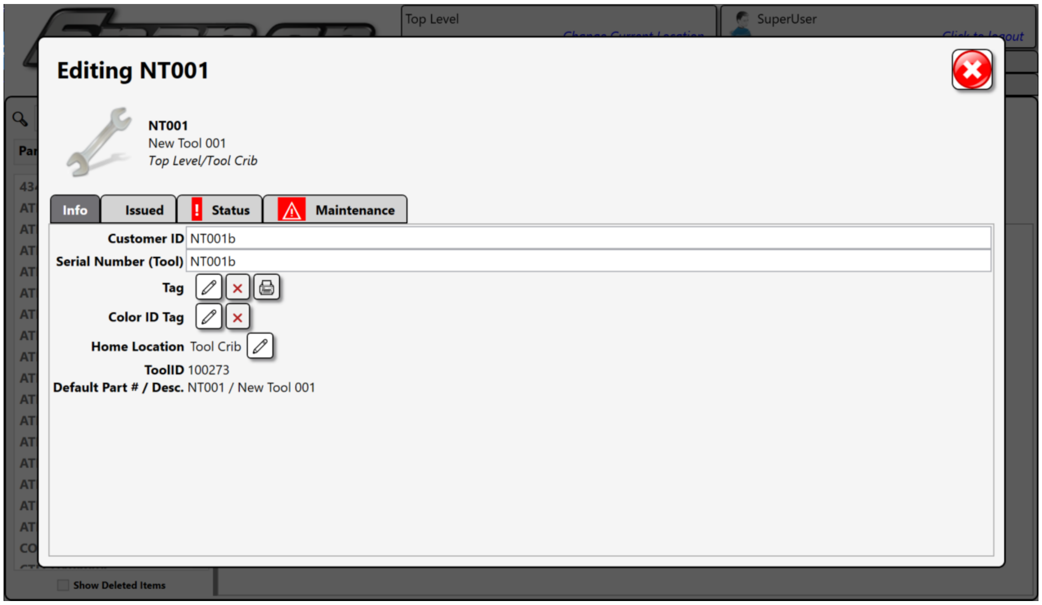


NOTE: The Warning value is # of days/cycles from maintenance date. For example, when this tool gets to within 2 days of the maintenance date, it will be flagged as pending maintenance.

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.

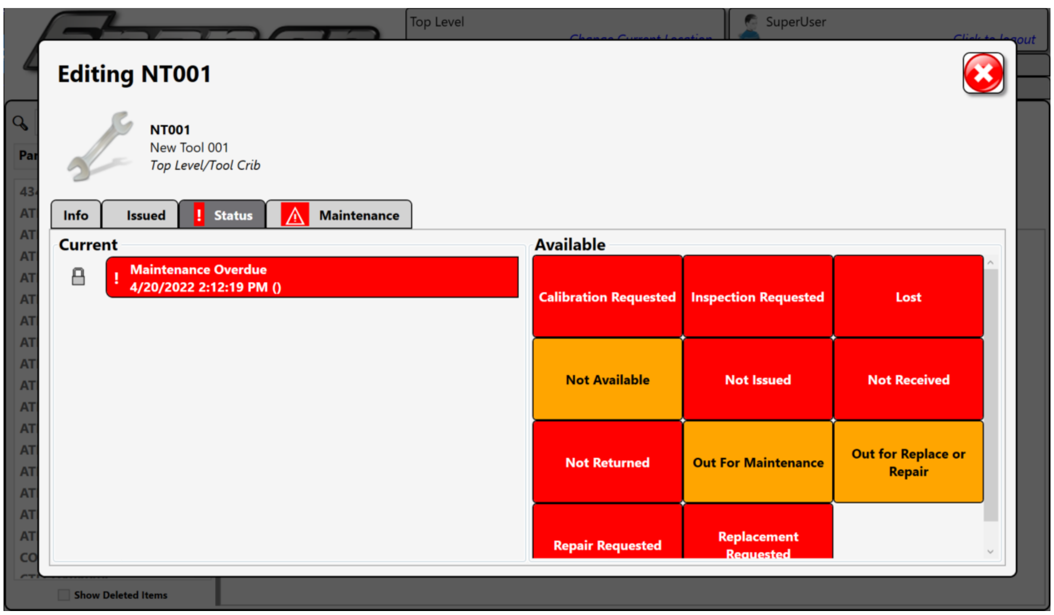


You can **double-click** on **NT001b** to bring up its properties.

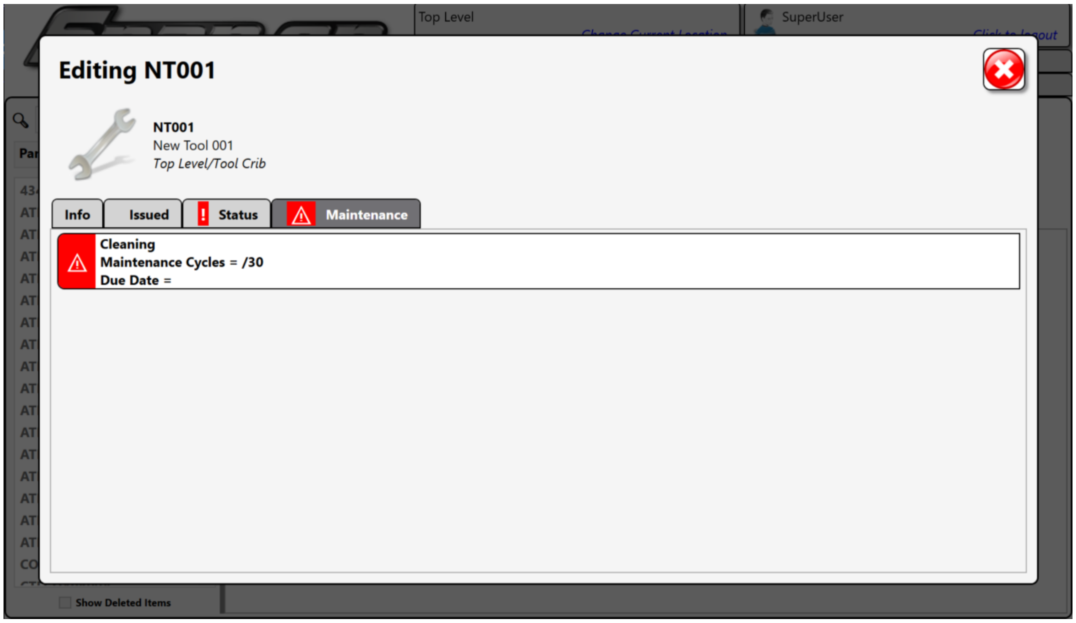


As you can see, there are active alerts on the **Status** and **Maintenance** tabs.

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

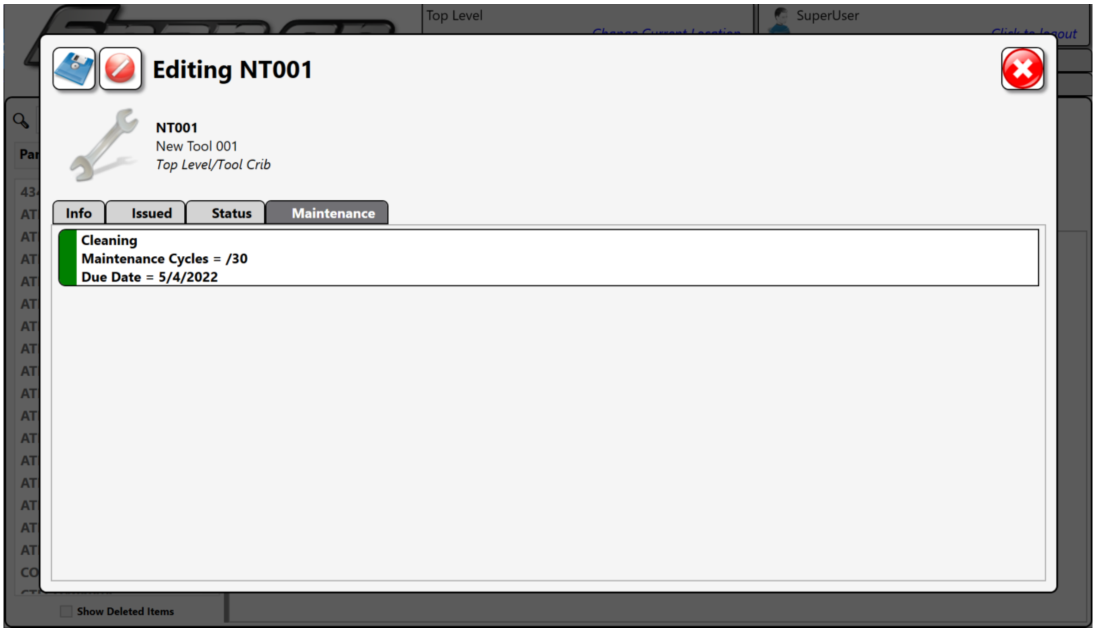


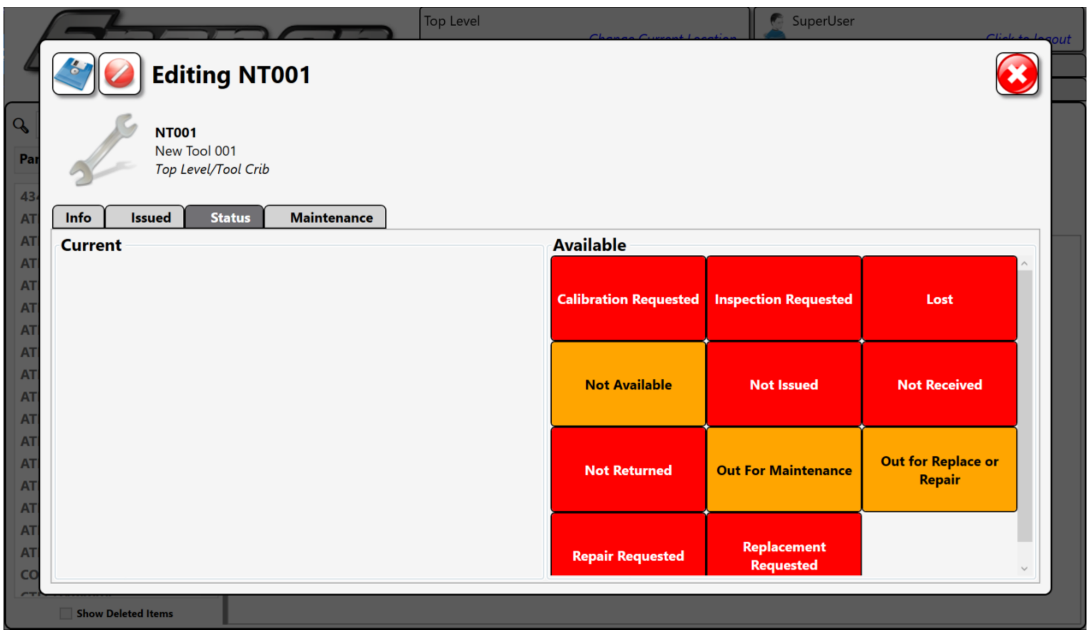
If you go over to the Maintenance tab, you can see that the date and time for the plan you just created have not been set. So the system doesn't know when it needs to start the maintenance schedule.



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 ✓ button to set it.

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





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

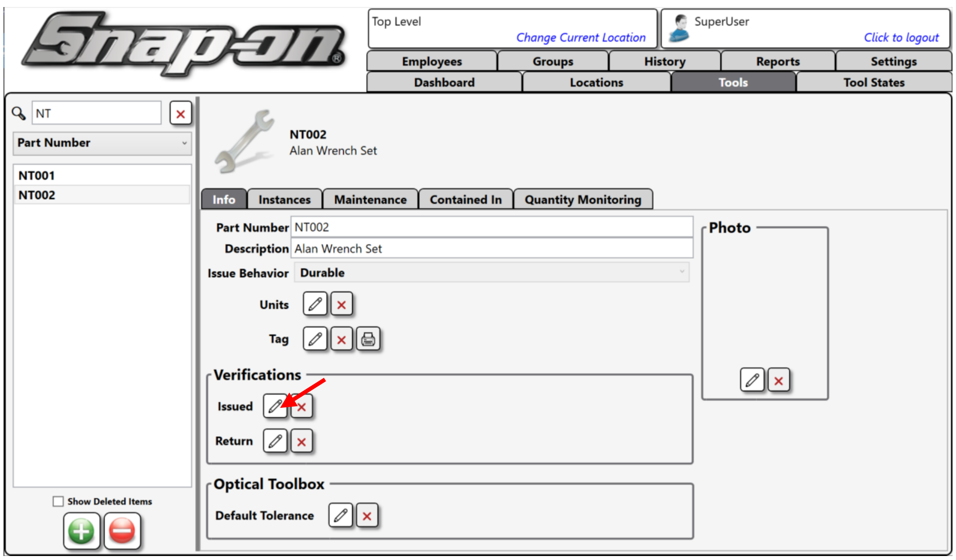
NOTE: You will need to set the maintenance date for every instance of a tool that you create a plan for. This is because once the maintenance plan has been set, the system doesn't know when the last date of maintenance occurred and cannot calculate the next maintenance date.

Verifications

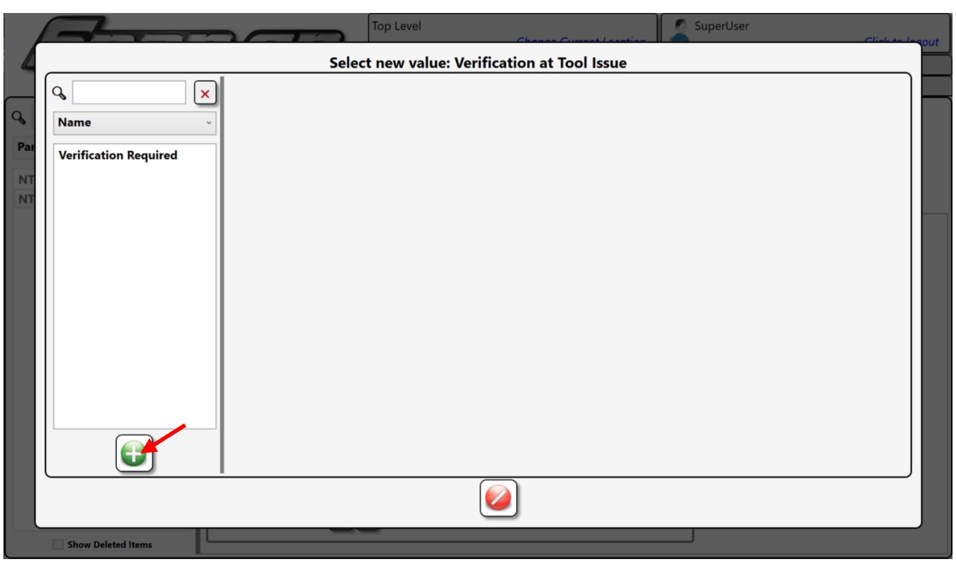
A **verification** defines whether you want the user to verify the tool's condition when checking out or returning it back to its device. For example, these steps could be ensuring that the settings are reset on a tool or cleaned before returning it. It could also verify that a kit being issued or returned 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 button.



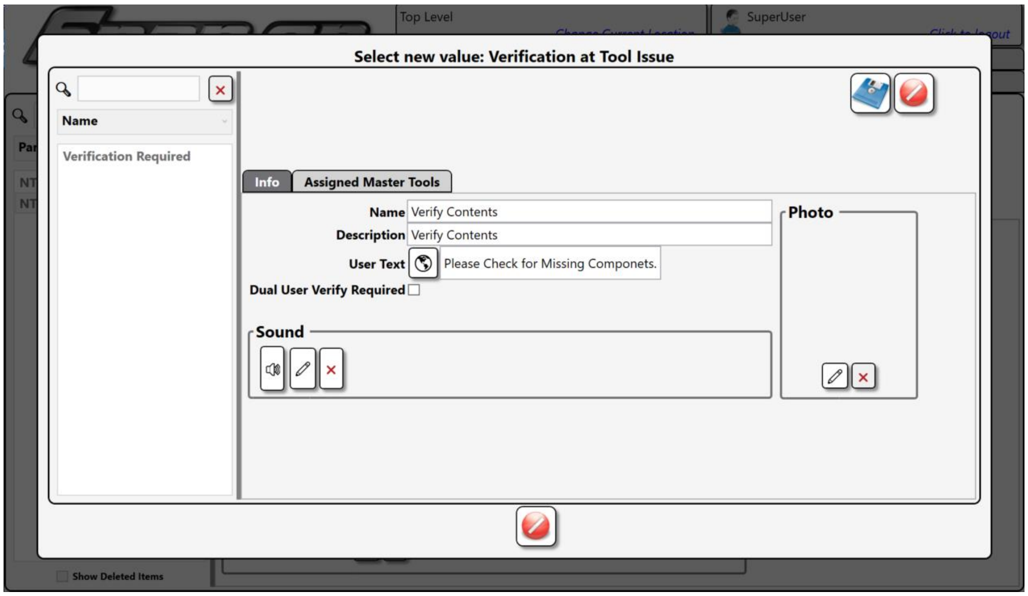
This will bring up the **Verifications Dialog Screen**. From this screen, you will need to create a new verification that instructs the employees on what you want them to do when they check out this kit. Click on the button.



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

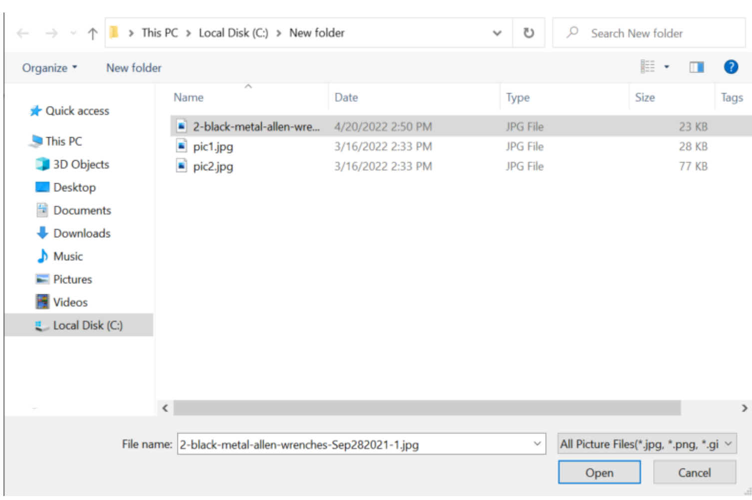
Let's fill out the information on this screen to create the Verification.



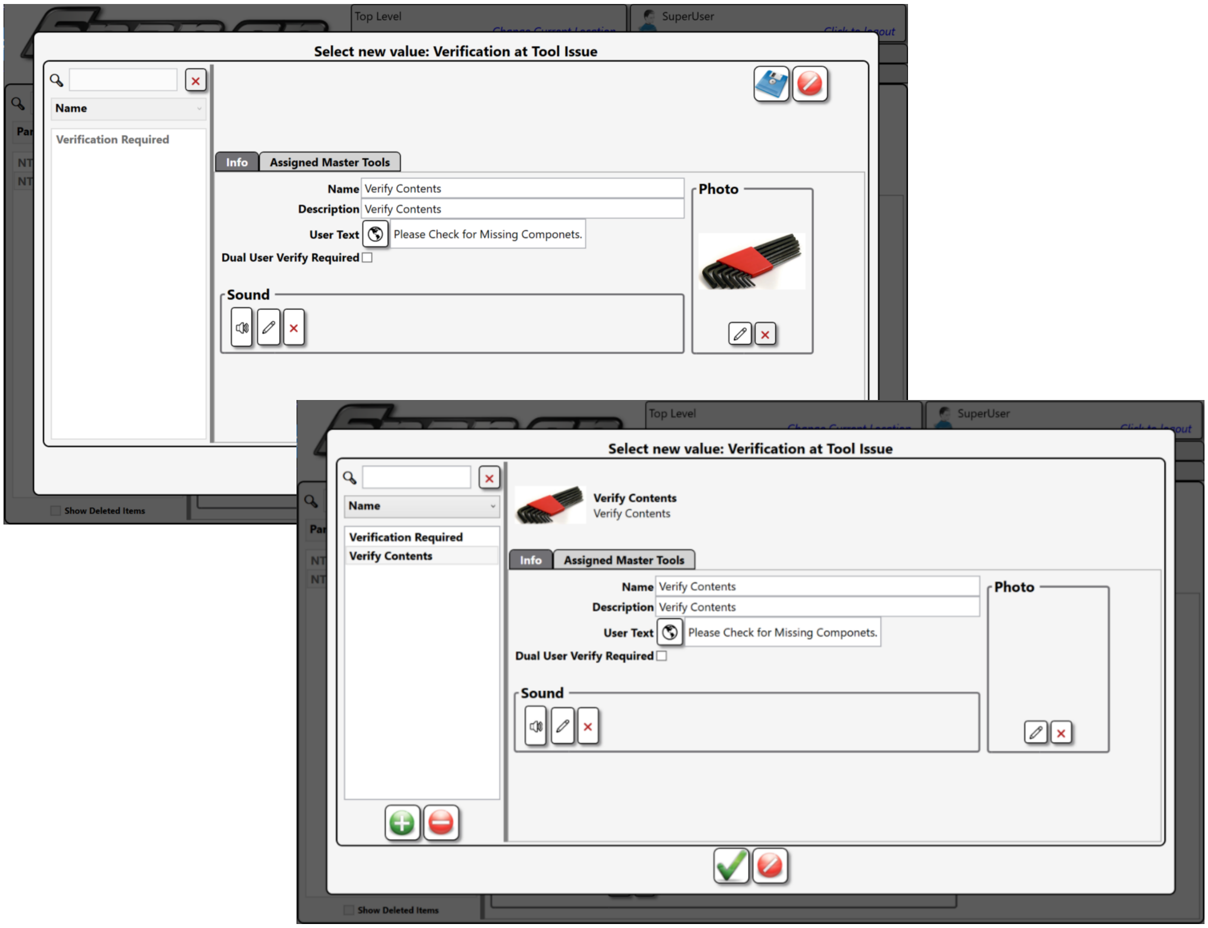
If you need to have a second person validate the Verification, check the box by **Dual User Verify Required.** This will require a second person to confirm the Verification.

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

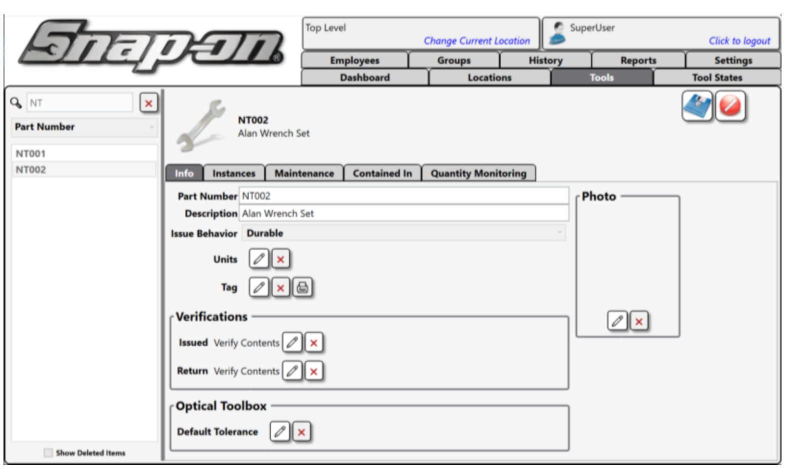
A photo is good to have so that when someone is issued the set, they can see what is supposed to be in it. To add a photo, click on the button. You will then be prompted to select your image.



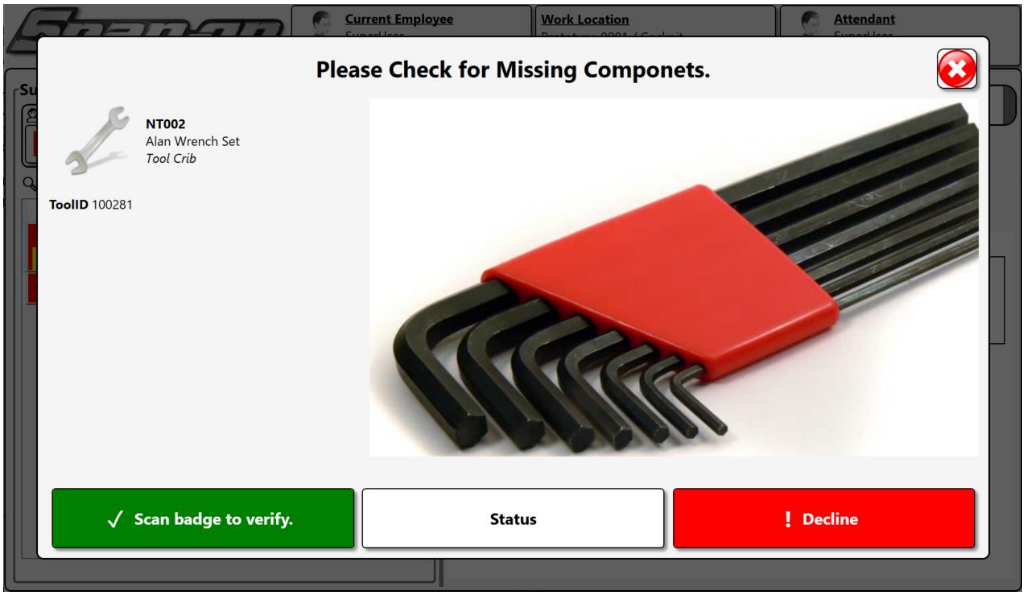
The picture will then show on the verification screen. Click the Save button when you are done. Then click the ✓ button to assign the Verification to the Master Tool.



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 ✓ button. Then click the SAVE button on the Master Tool.



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:

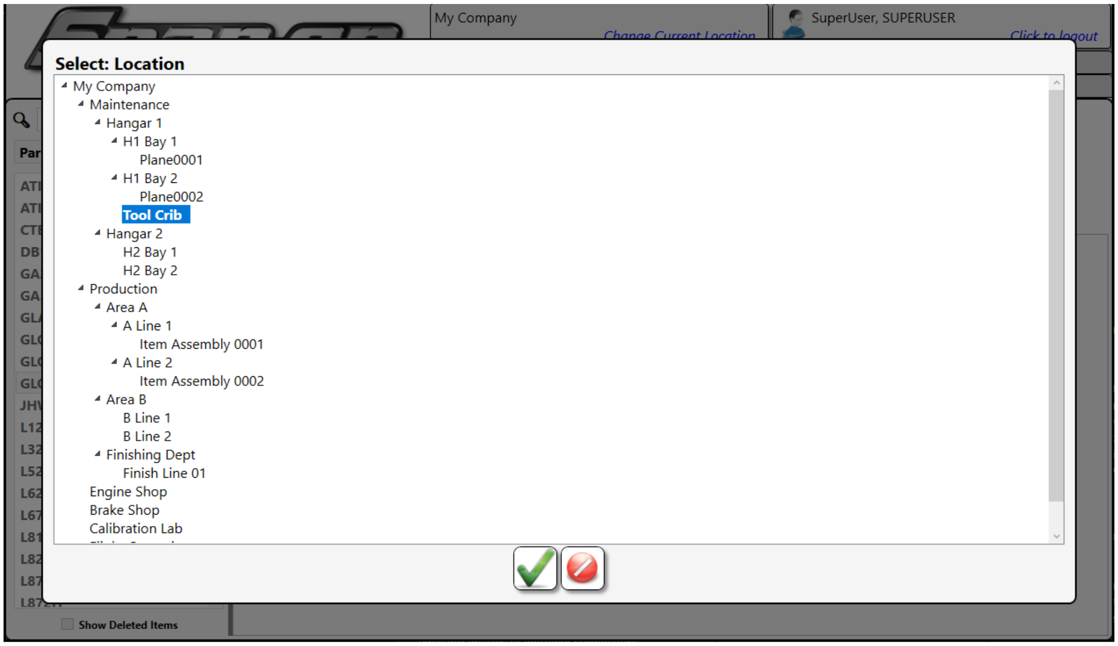
- **MIN/MAX** – This Monitor keeps track of the total available inventory. When the count falls below the **MIN** value, it shows up in the **RESTOCK REPORT**. This Monitor is typically set at the Device level.
- **REORDER** – This Monitor keeps track of the total available inventory as well. When the 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

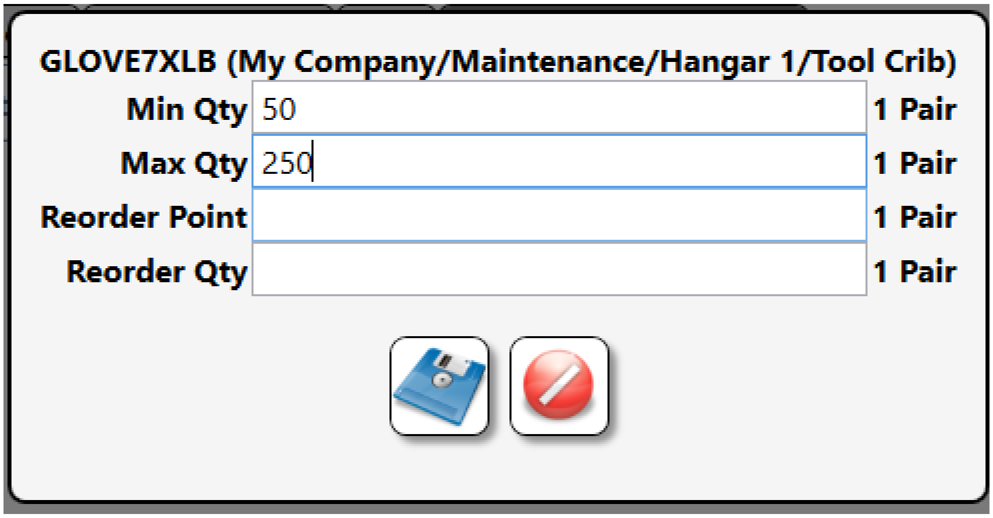
Open the **Tools tab** and select a **Consumable tool,** then select the **Quantity Monitoring Tab**

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**.

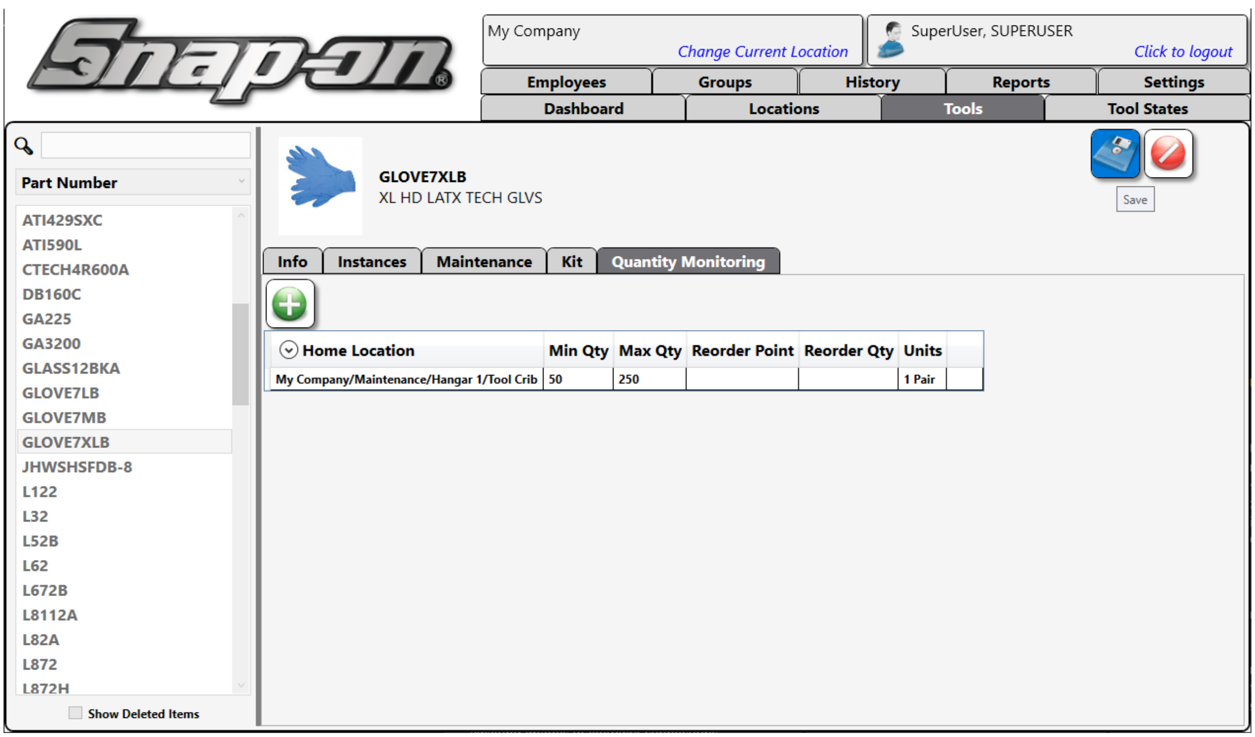


Click the to continue. You are now presented with the Monitor Properties dialog.

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.



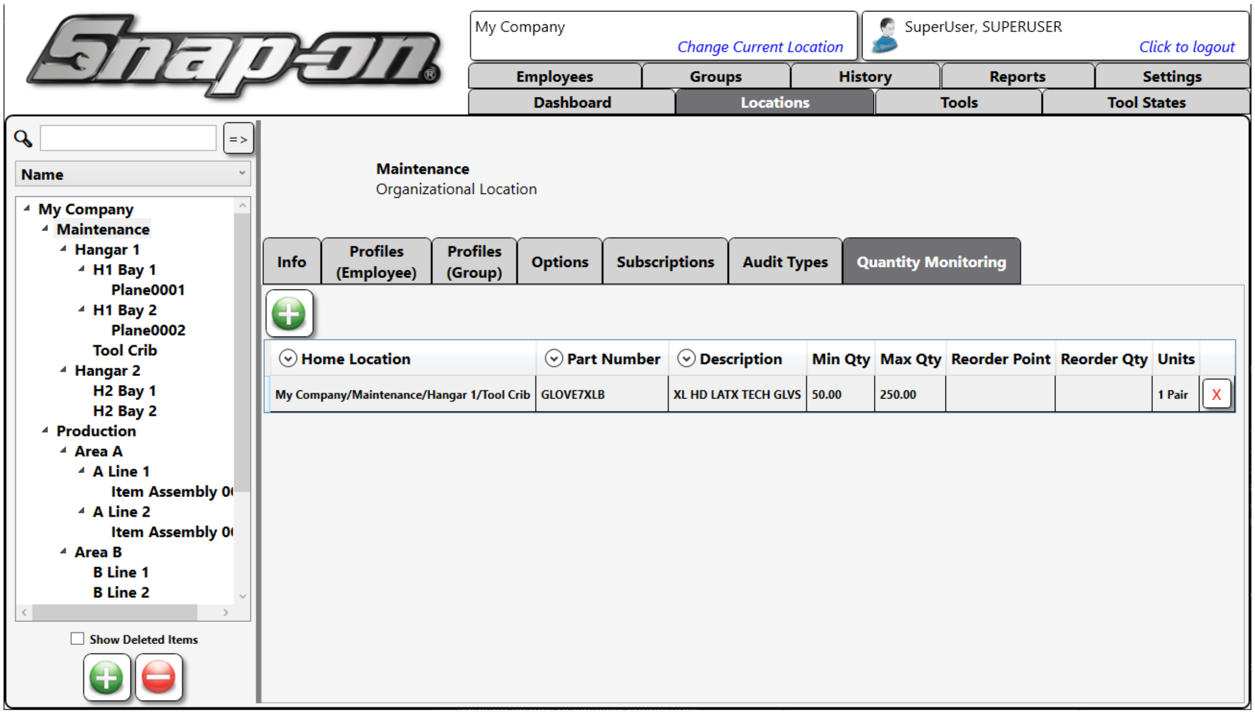
Click the SAVE button to save the Monitor. Then save the tool.



Creating a Monitor from the Locations Tab

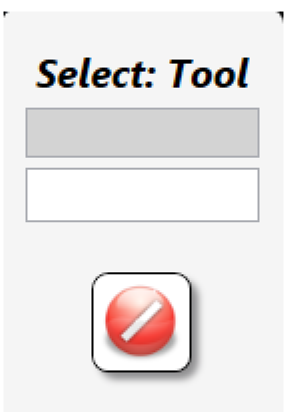
Now that you have a Monitor set for Restocking create another one for Reordering when inventory gets low. You set this at the organization level so that the Monitor can see the inventory levels of all sub-locations.

Open the **Locations Tab**, select the Maintenance location, and then go to the **Quantity Monitoring** tab.

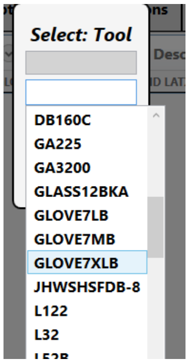


You can see the Monitor you already created because it is a child location to the one you have selected.

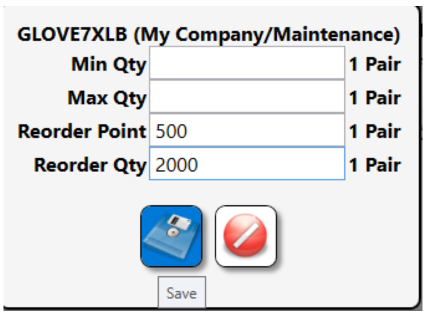
You will again click on the button; this time, you are asked to select a tool.



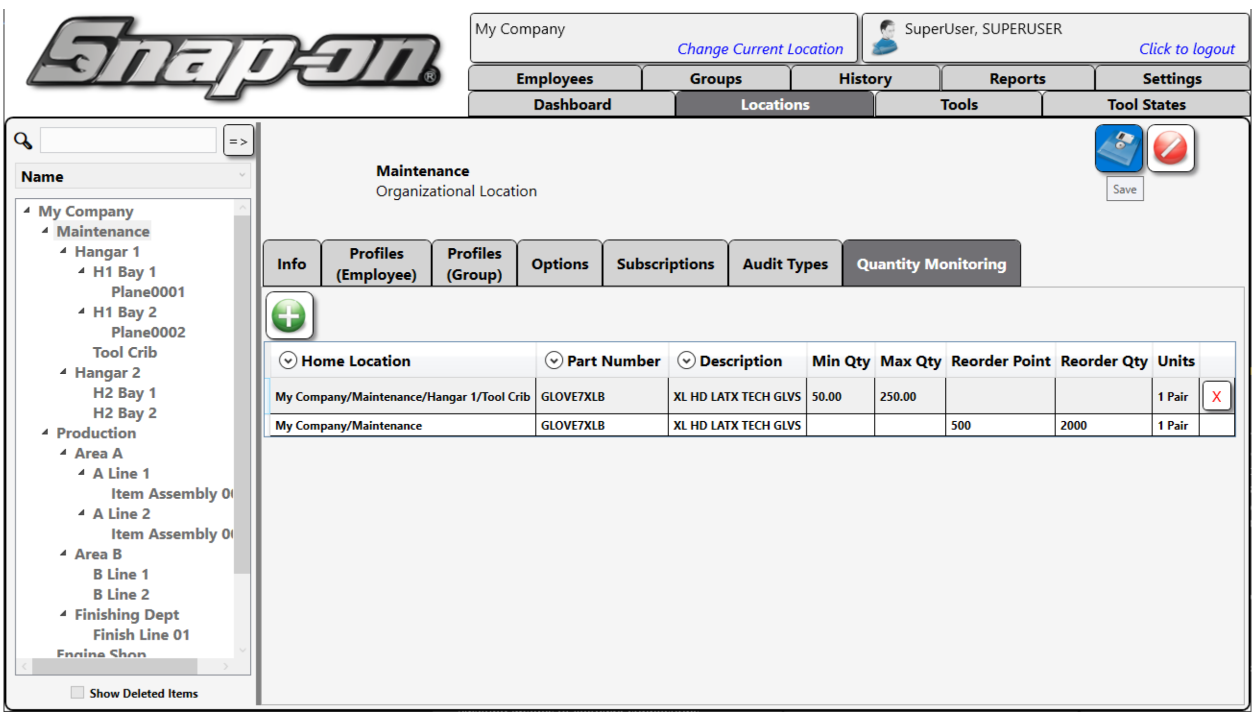
Move your mouse to the White Space and select the Tool **GLOVE7XLB.**



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.

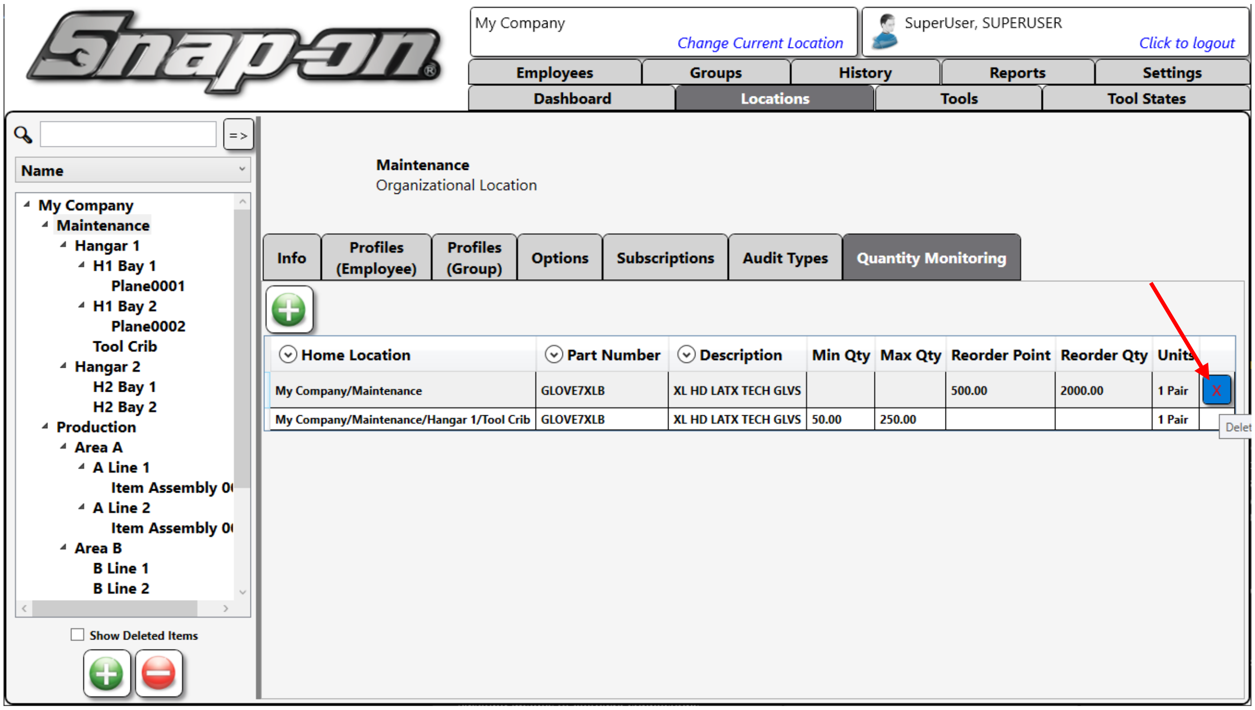


Then click **SAVE**, and then Save the Location.



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

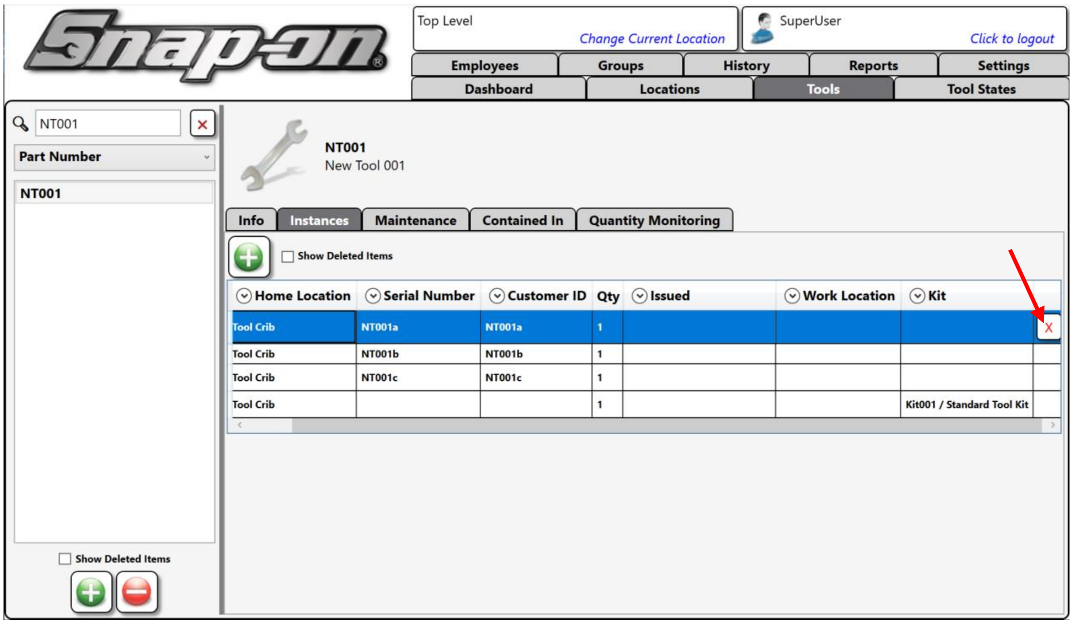
If you want to remove a Monitor, click on the **DELETE BUTTON**.



Deleting a Tool

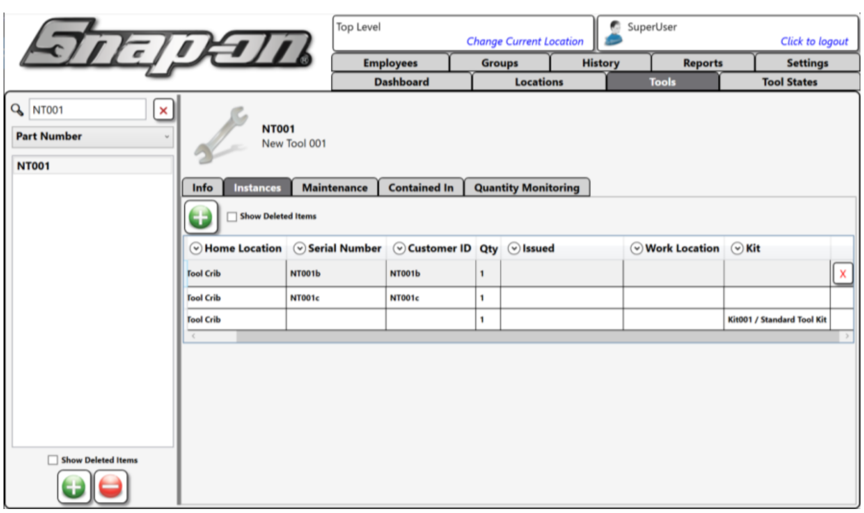
Sometimes you no longer have a tool, or one has been retired out of service—no need to keep it in the system, taking up space. You can easily remove the tool by deleting it.

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.

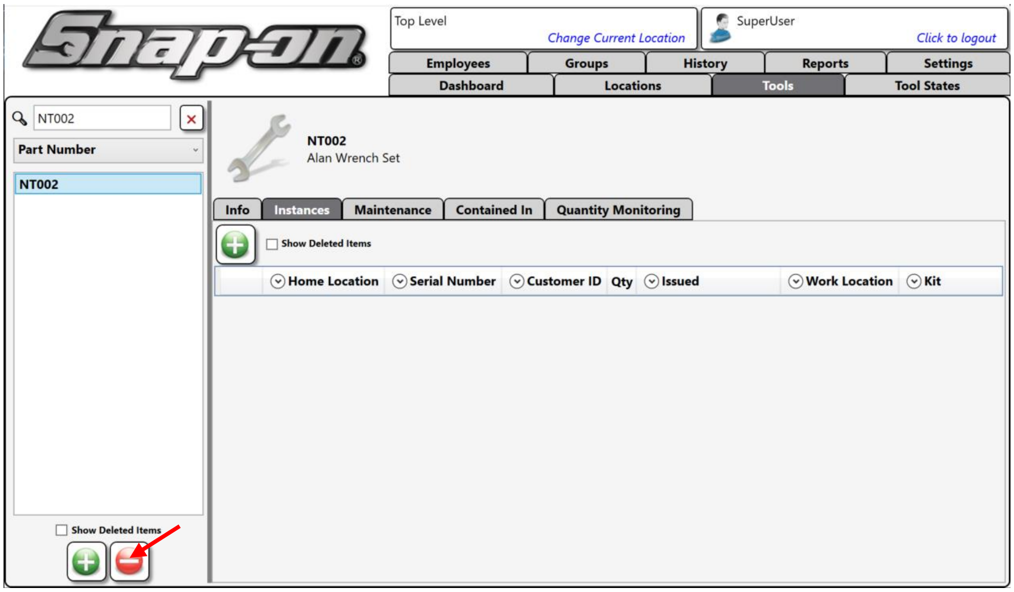


Click **Yes** to confirm you want to remove the Instance.

The Instance will then be removed from the list.



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



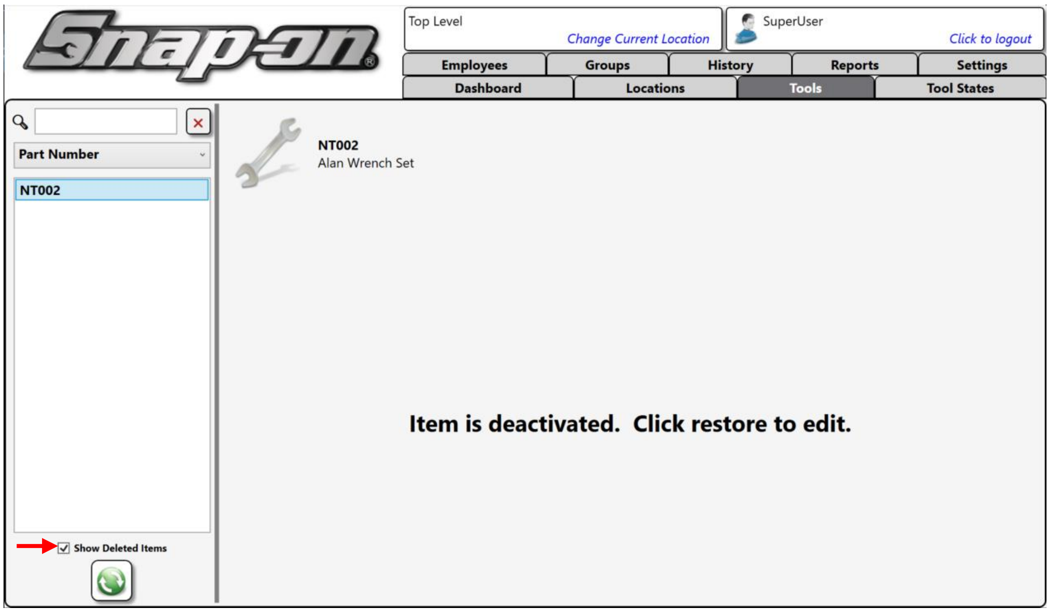
Click **Yes** and **Master Tool;** NT002 will be deleted.

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

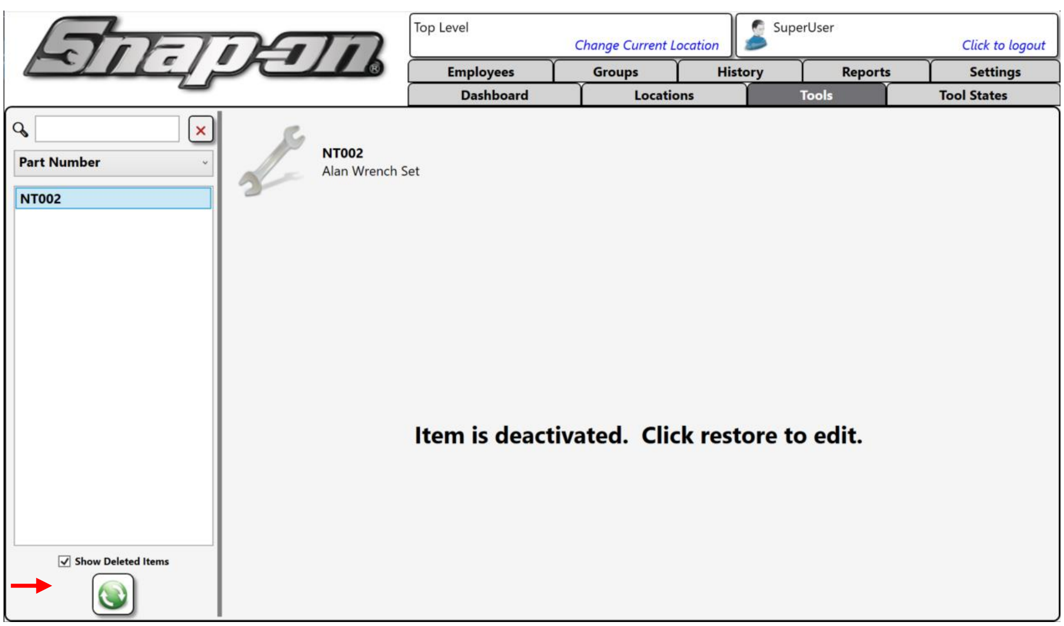
Restoring a Tool

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.

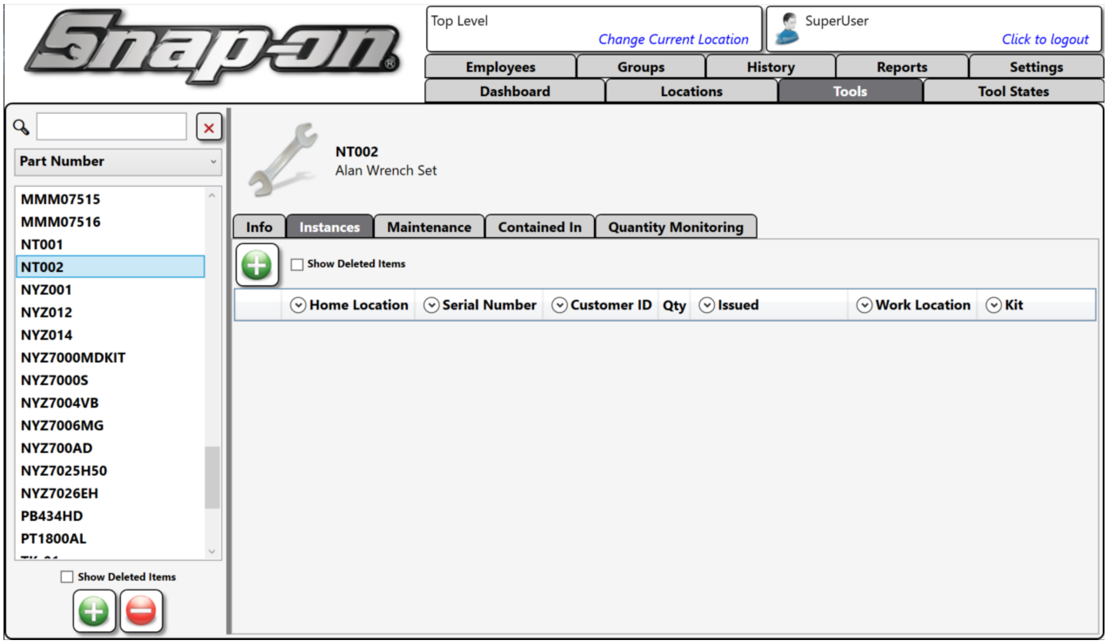
On the Tools Tab, click on the **Show Deleted Items** checkbox on the lower left-hand side of the screen. This will give you a list of all deleted **Master Tools.**



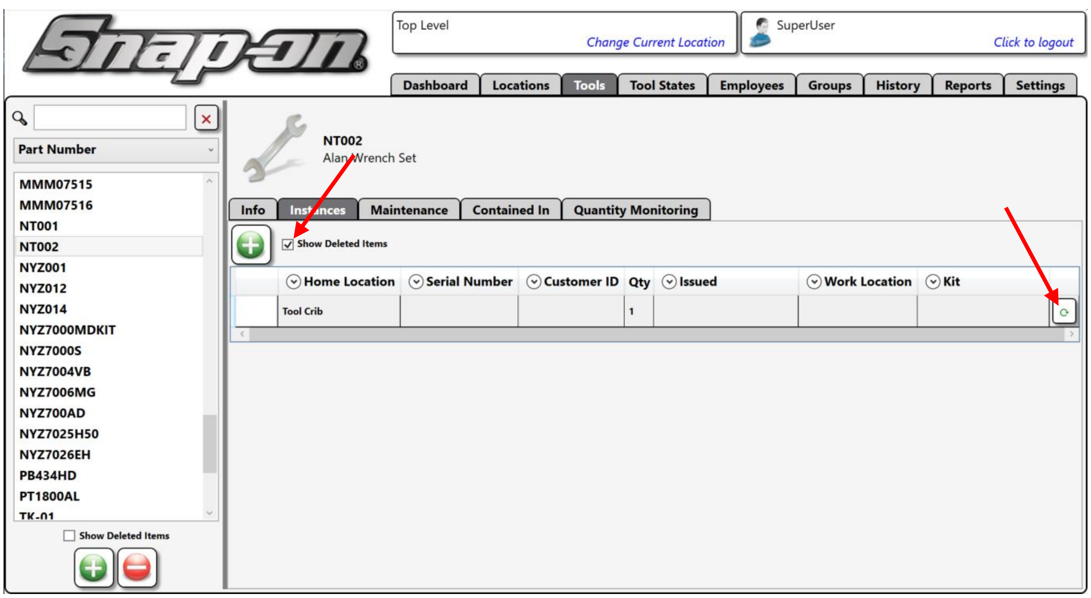
Select the tool you want to restore, then click the green button. Uncheck the checkbox to return the list back to normal.



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



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.



The Instance will now be available again for an issue.

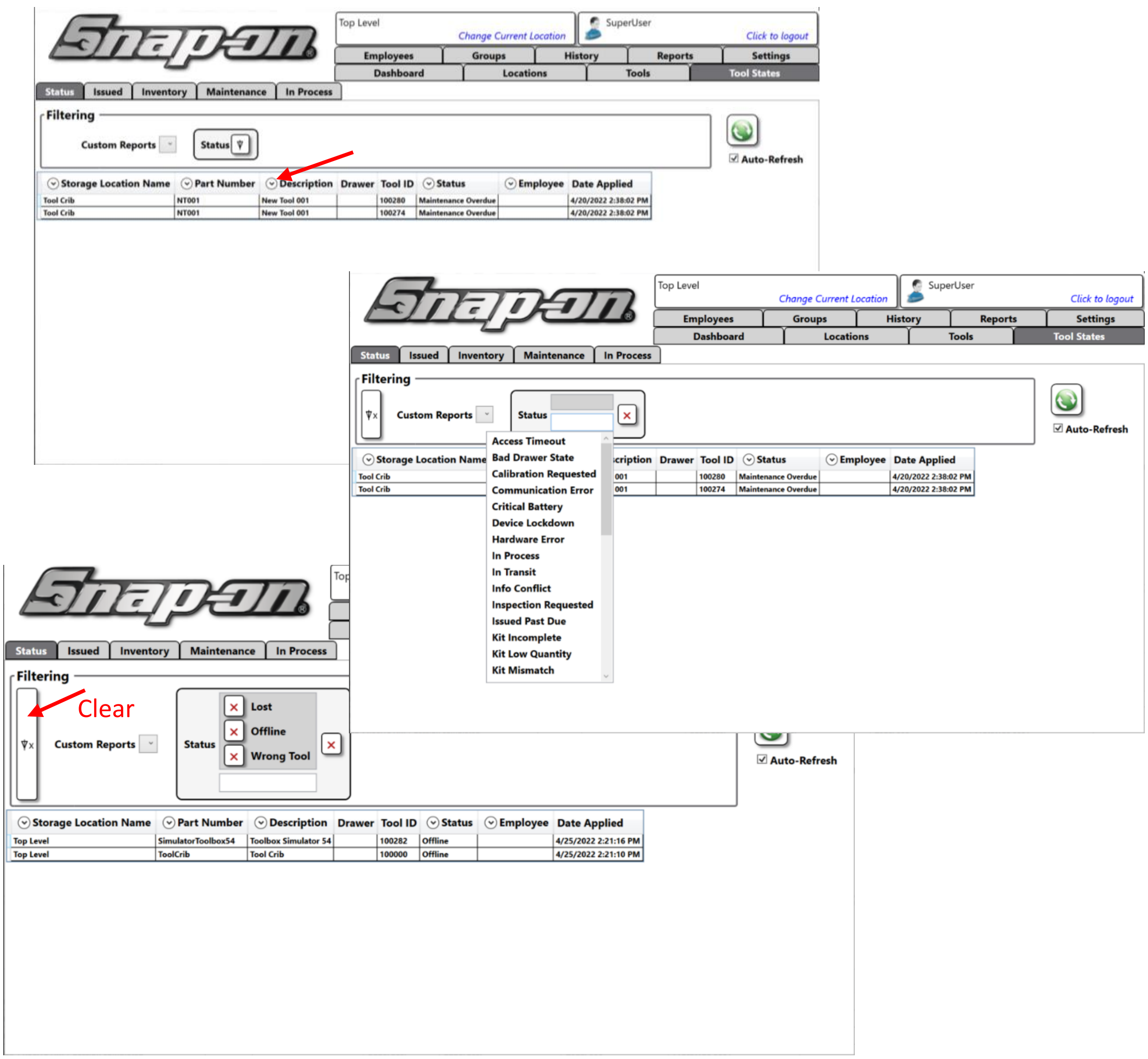
Tool States

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.

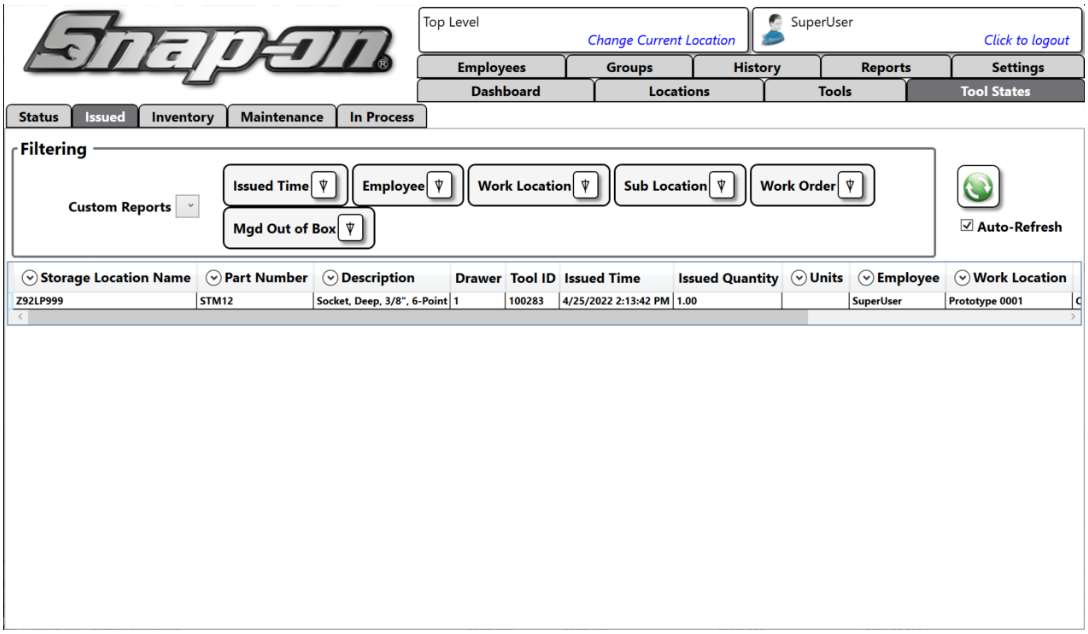
Status Tab

If a status has been applied to any of your tools or L5 Connect™ 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.

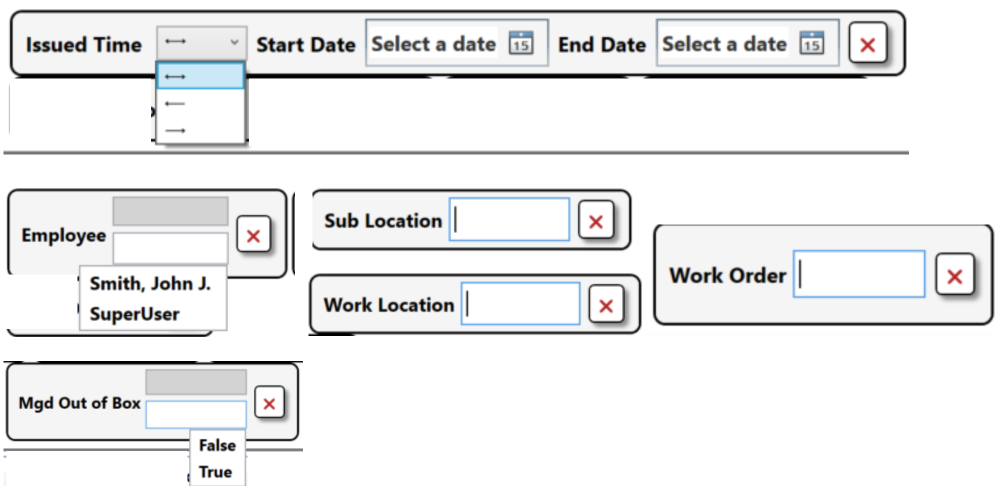


Issued Tab

This tab shows all currently issued tools.



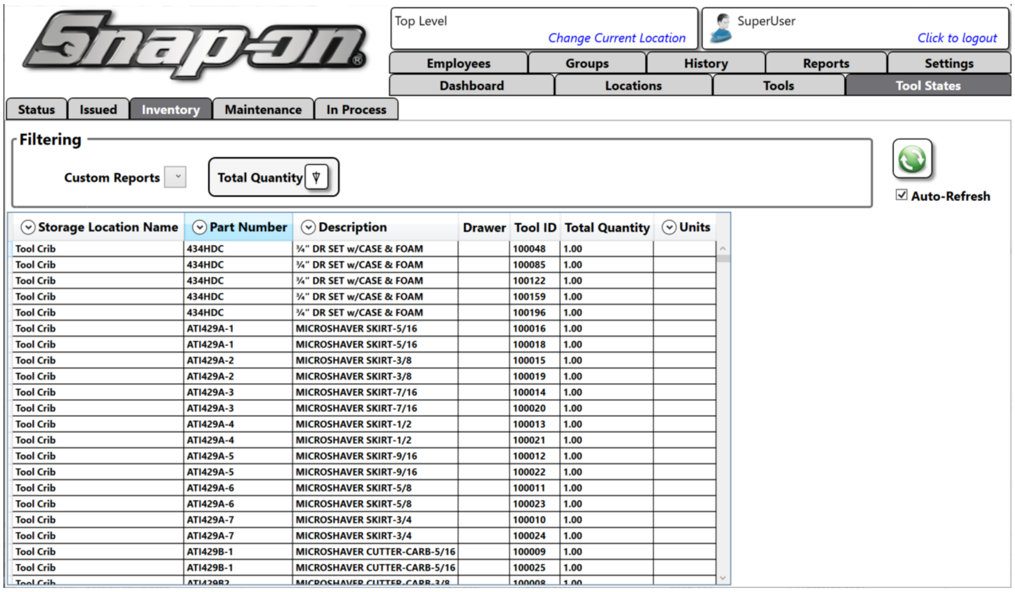
You can filter this list based on the following:



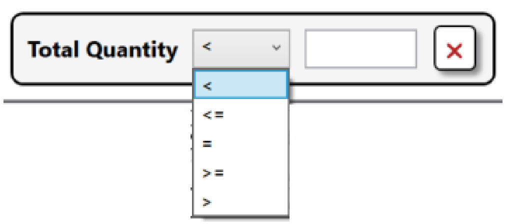
You can also apply a custom Issued Tools report to this list as a custom filter.

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.



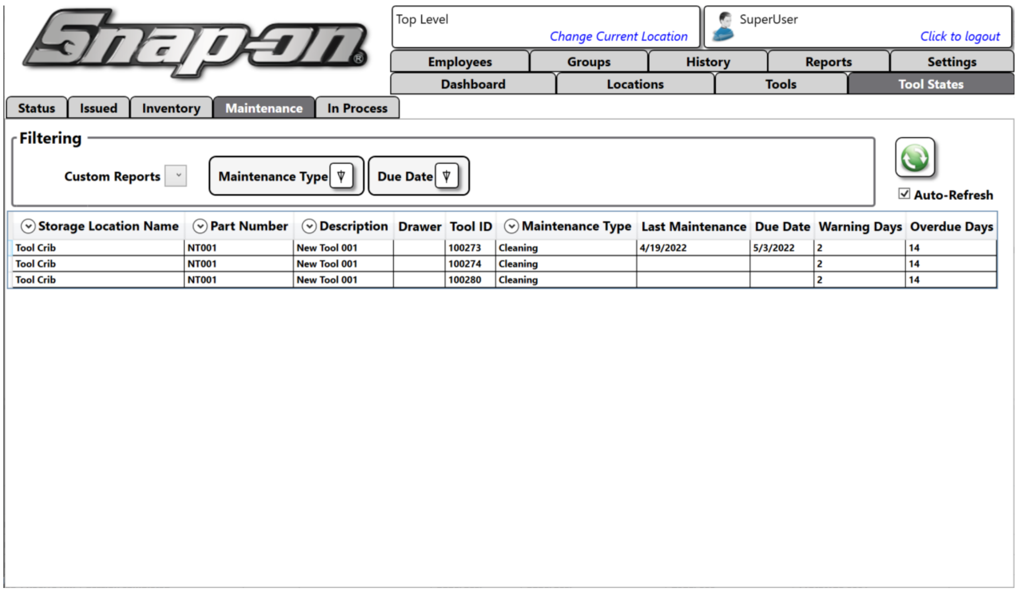
You can also filter the view based on Quantity using the Quantity filter.



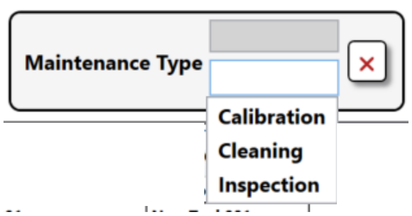
You can also apply a custom Tool Inventory report to filter this list further.

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.



The following filters can be applied to the list.



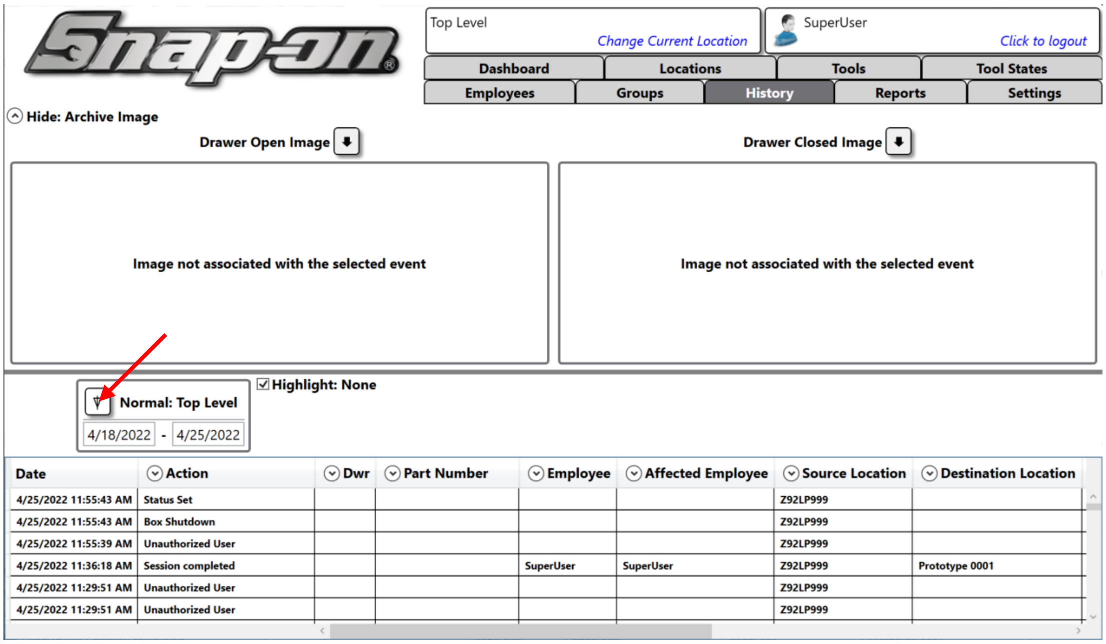
Like all the other tabs, you can further filter this list by Location or apply a custom Tool Maintenance Report.

In Process Tab

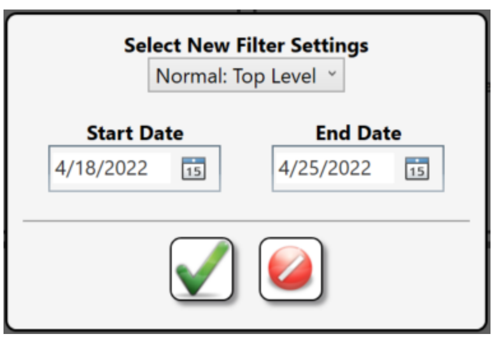
This tab is for a future feature that will be fully implemented later.

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.



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



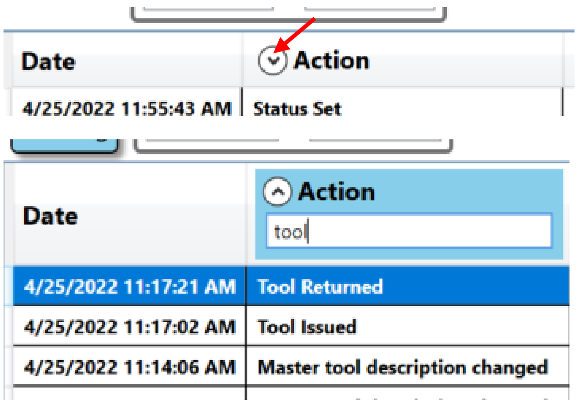
Set the Location, **Start Date** & **End Date** for your search, then click the ✓ to accept or CANCEL button.

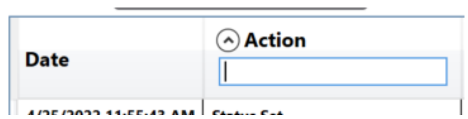
The list will only display the events for the location and date range you set.

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.



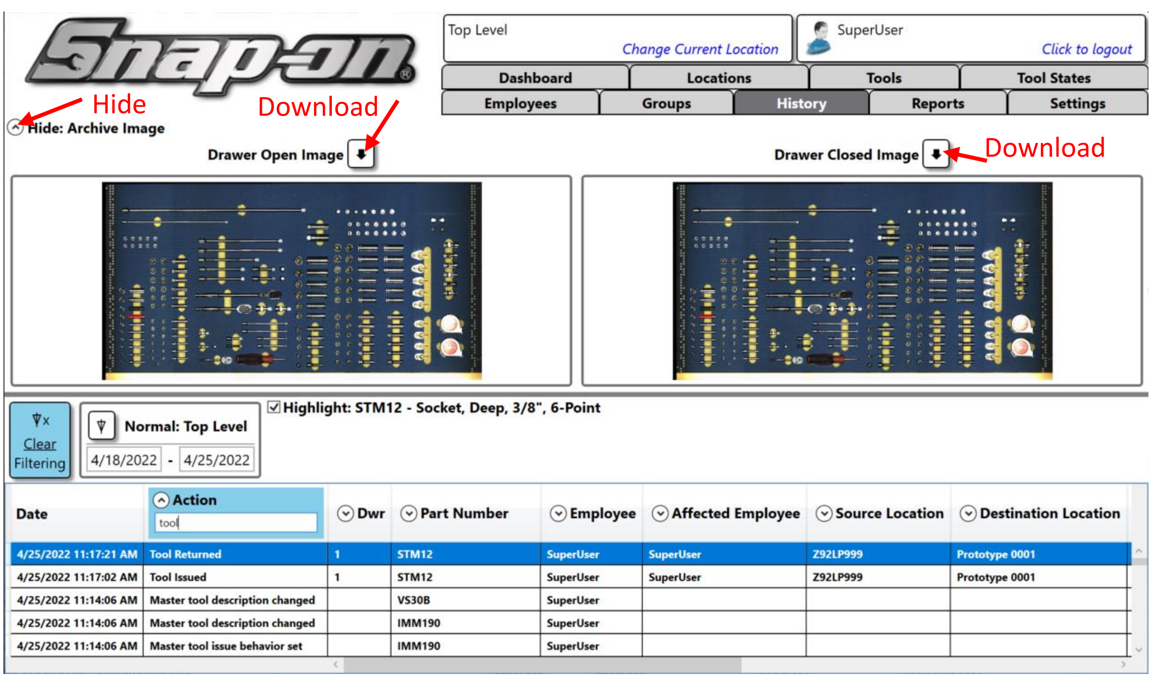


An archive image is uploaded to the service for toolbox tool issues and returns and is viewable from the History Tab. You can use this view to verify when a tool was removed and returned to the toolbox.

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.

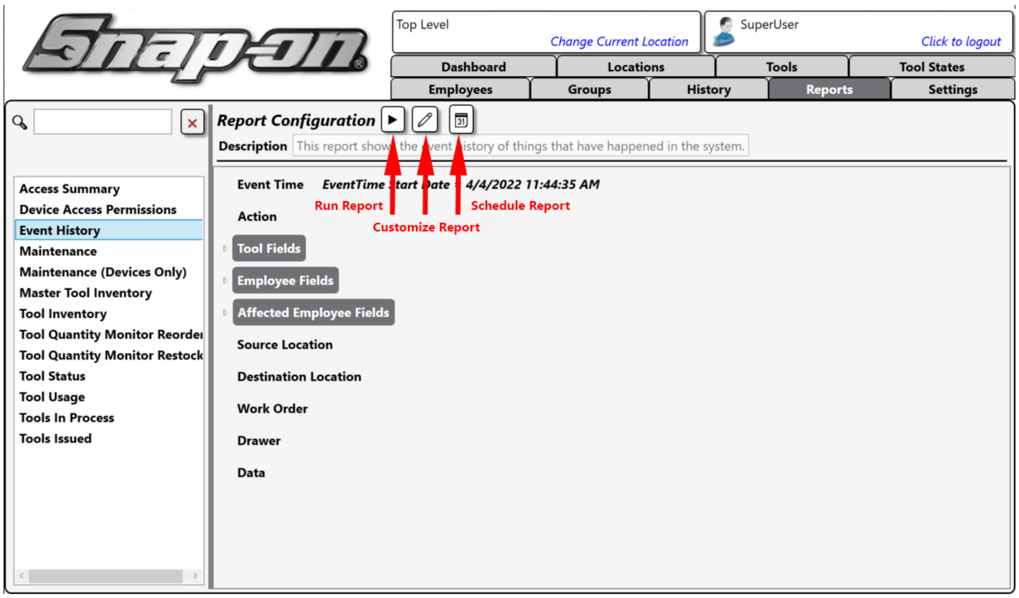


Reports

Overview

The L5 Connect™ 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™ as a whole. These reports can be generated within the **L5 Connect™ Admin Client** or the Admin Mode within True-Crib™.

You will be working within the **L5 Connect™ Admin Client** for this section. Still, the method of generating reports in **True-Crib**™ client is nearly identical.



The L5 Connect™ 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.

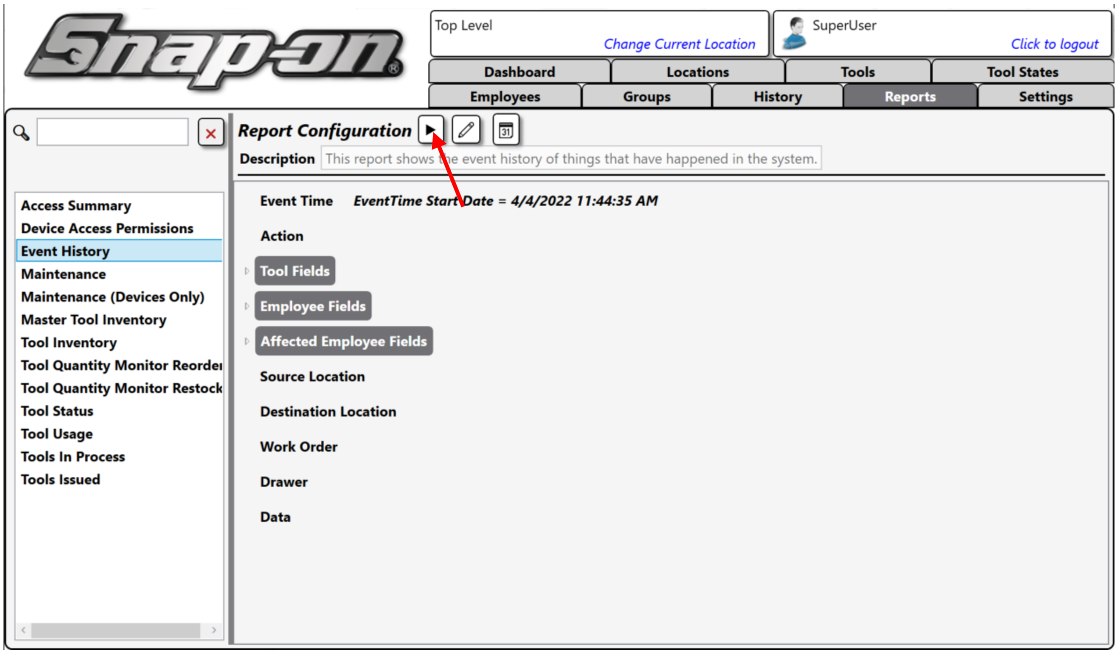
 Represents Share Report – Anyone who has access to run reports can run this one.

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

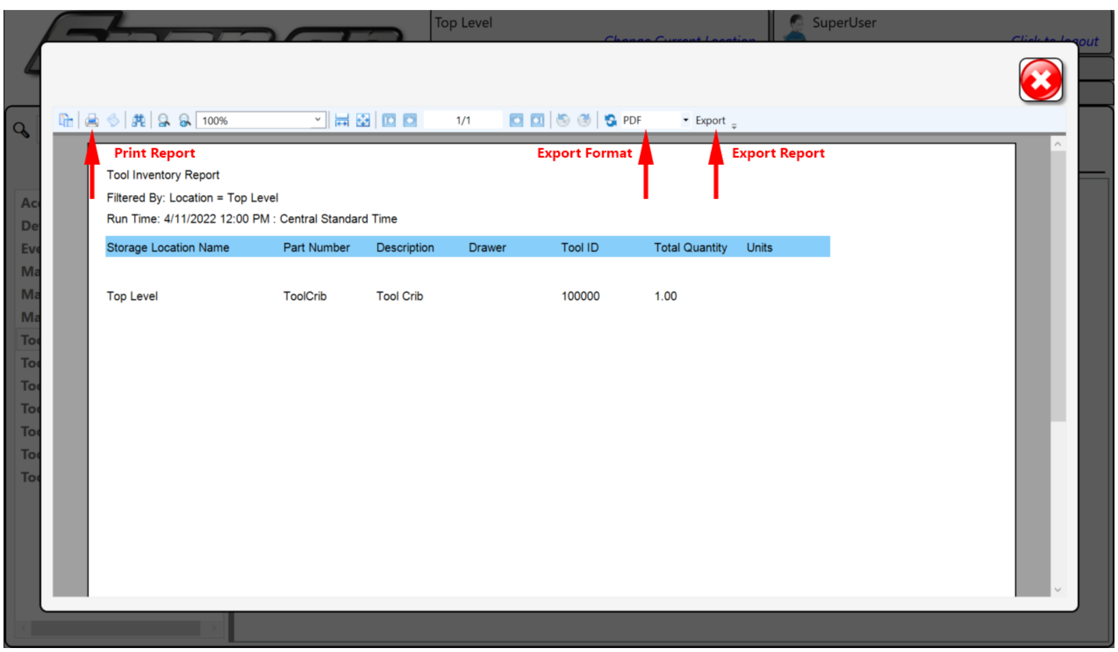
All **Personal** and **Shared Reports** are created based on one of the **Built-in Reports.** When you select one of these **Built-in** reports, you will be given the **Report Customization Subscreen**. On this screen, you can modify the Report presets to customize the Report to fit your needs, then 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**.

Generating a Report

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



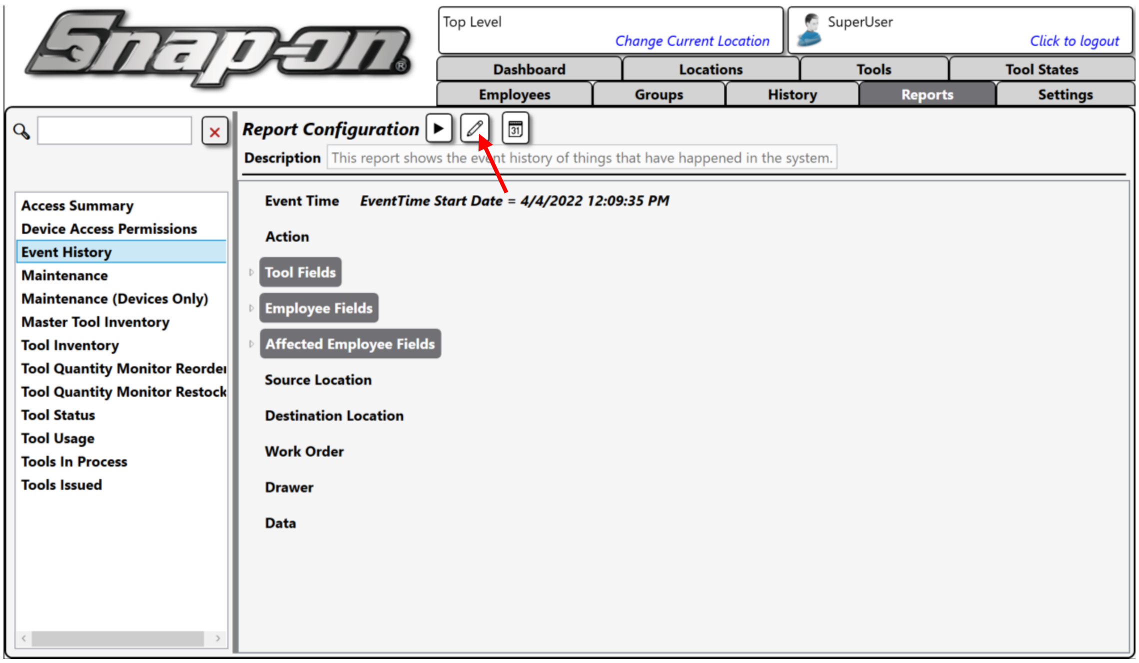
This will display the results of the desired Report. On this results screen, you can print and export the results.



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.

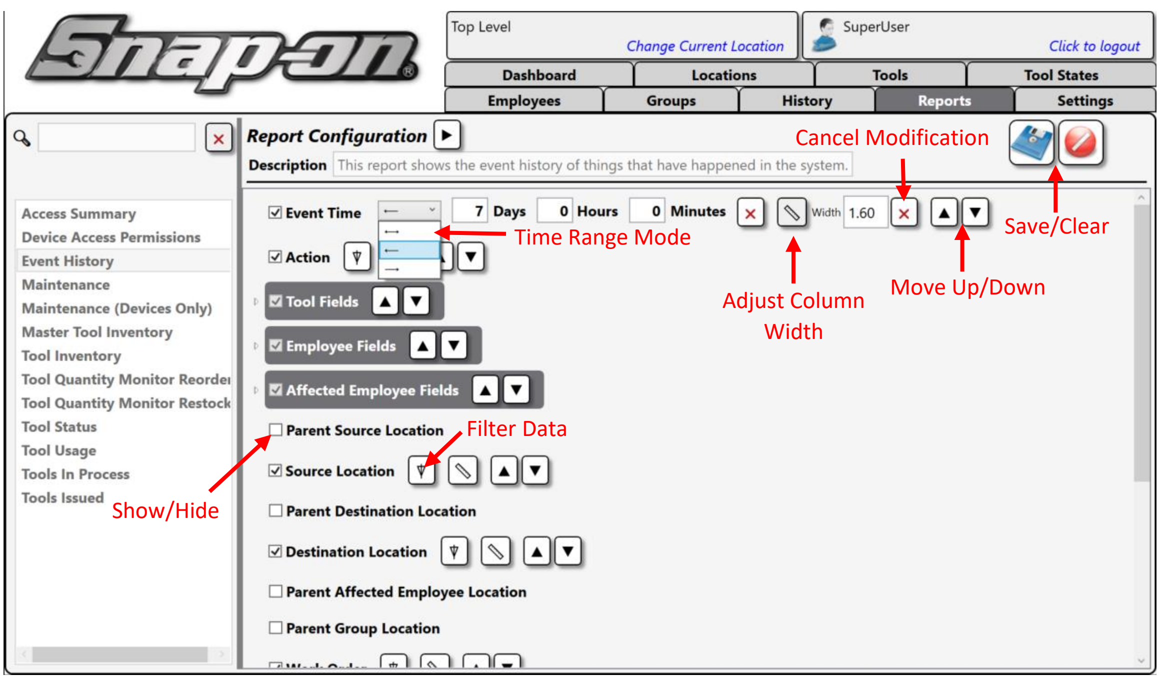
Personal Report

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** ✏️, this will open the **Report Customization Subscreen**.

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



Time Range Mode

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

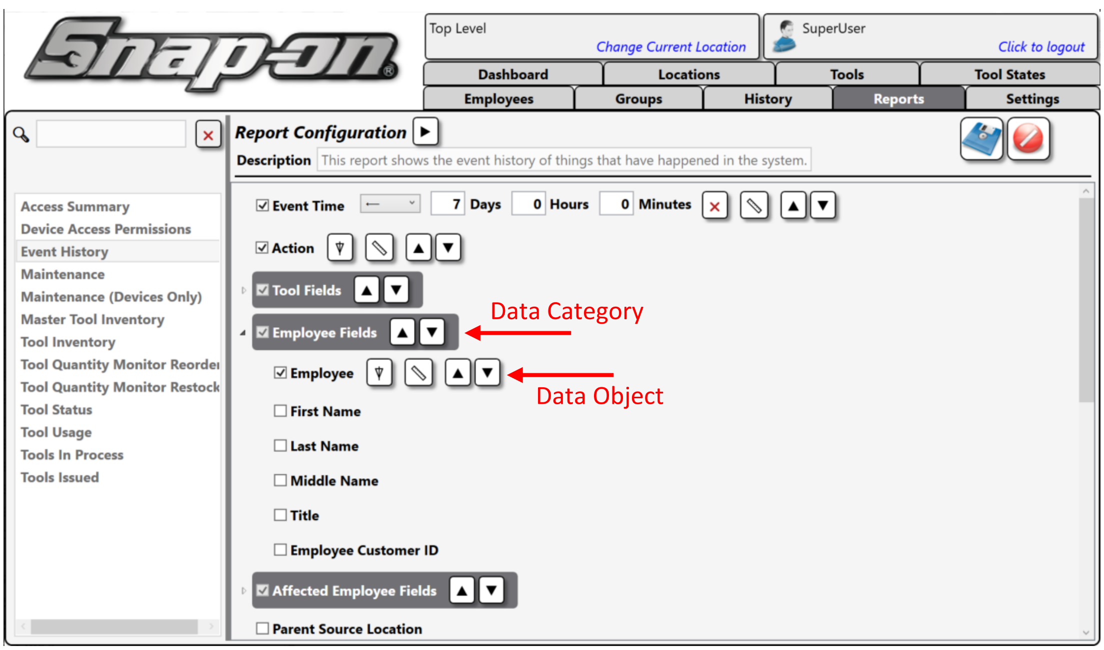
←→ Between Dates
← In the Last X Days
→ In the Next X Days

Filter Data Object

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

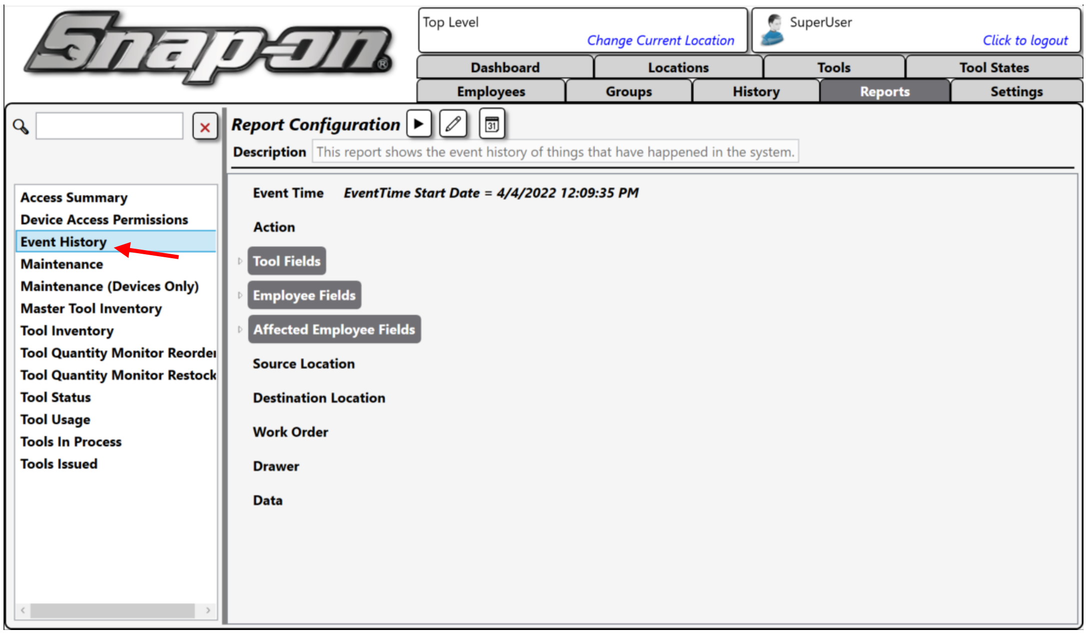
Moving a Data Object

When using the ▲ ▼ buttons, you can reorder the data as it is displayed on the Report. You can move a Data Object within its Data Category. Still, you cannot move it outside of its Data Category. For example, I can move the **Last Name** above **First Name**, but I cannot move it into the **Tool Fields** Category.

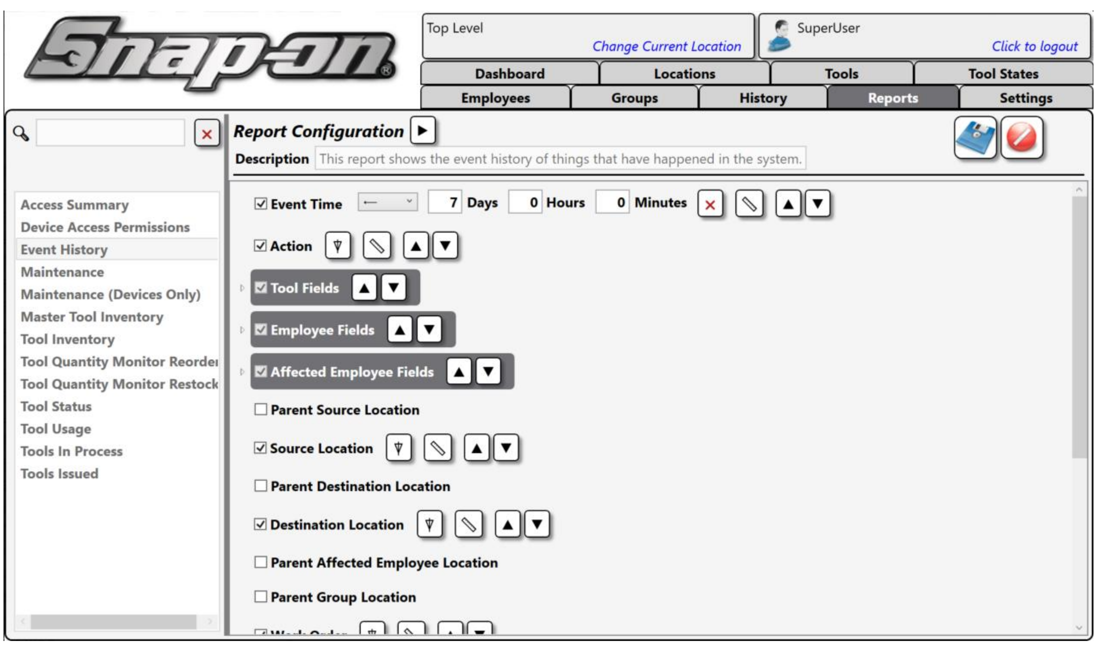


Creating a Report

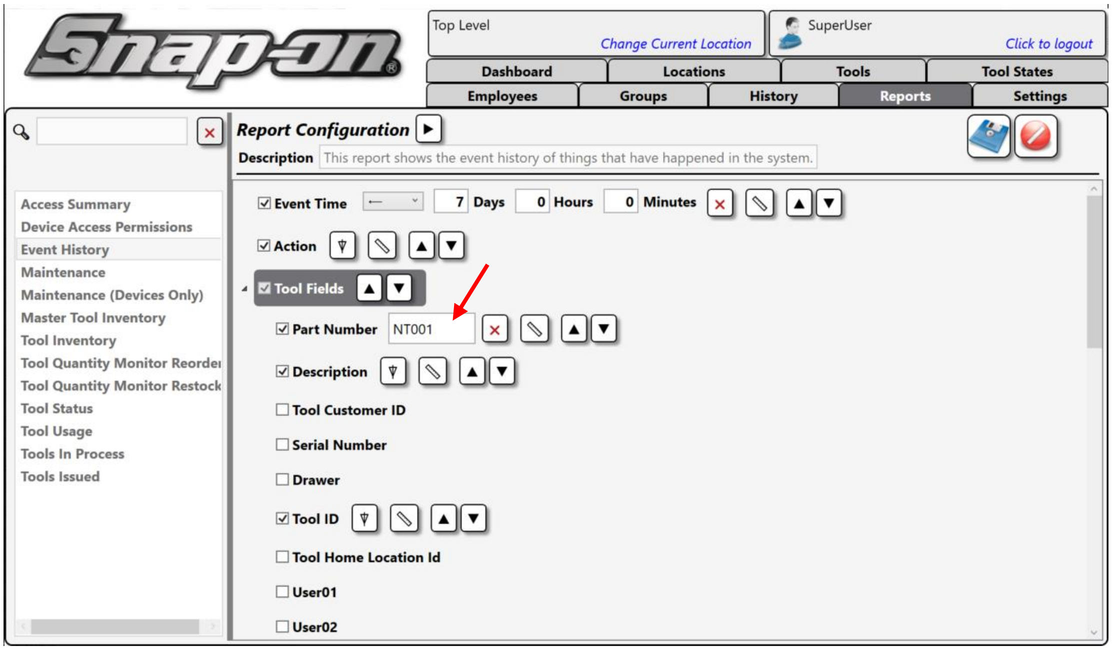
Say you want to run a report for all events for a specific tool, **NT001**. You also wish the Report to show the events that pertain to the Employee **SUPERUSER**. You will begin by selecting an appropriate **Built-in Report** (Event History).



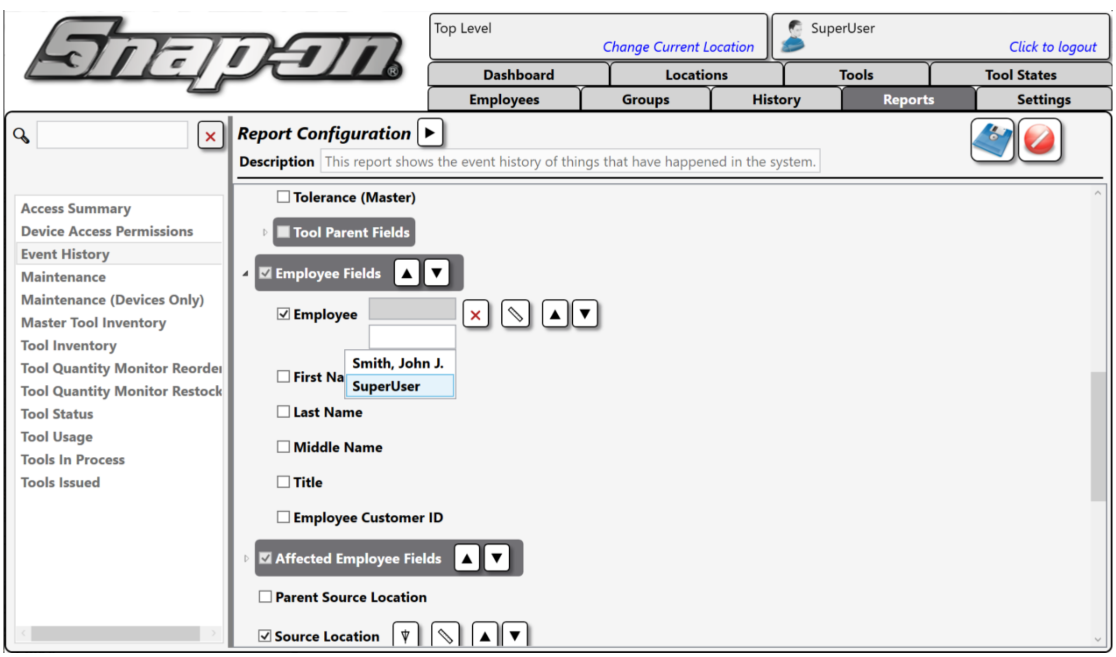
Then click on the **Modify Button** to open the **Report Customization Subscreen**.



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**.

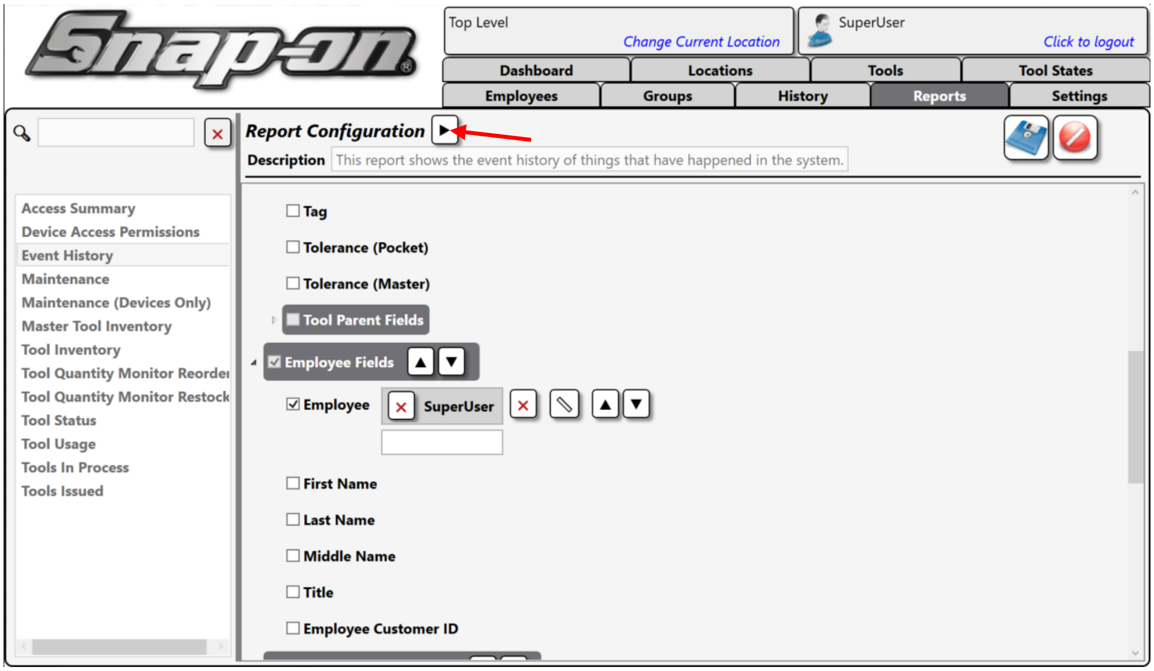


Then scroll down and select the user in the Employee filter.

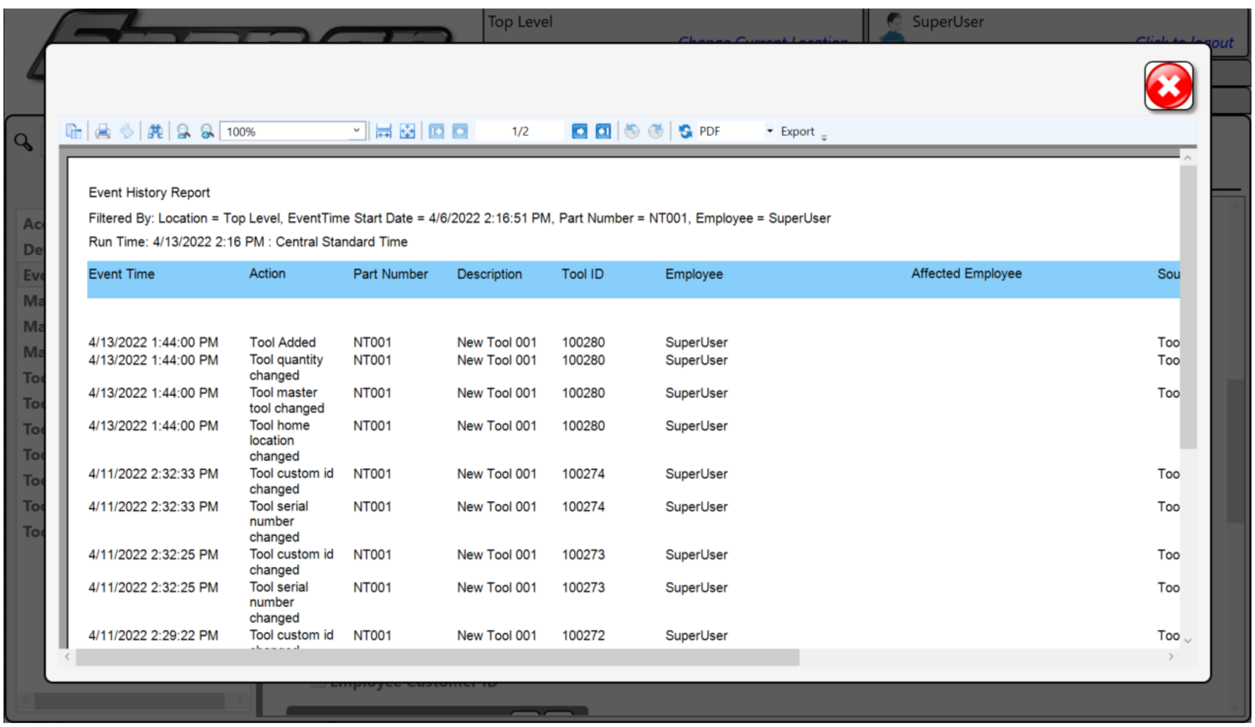


As you can see, with the different types of filters, the **Part Number** filter required you to type in the Part Number, and the **Employee** filter used a pull-down.

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.

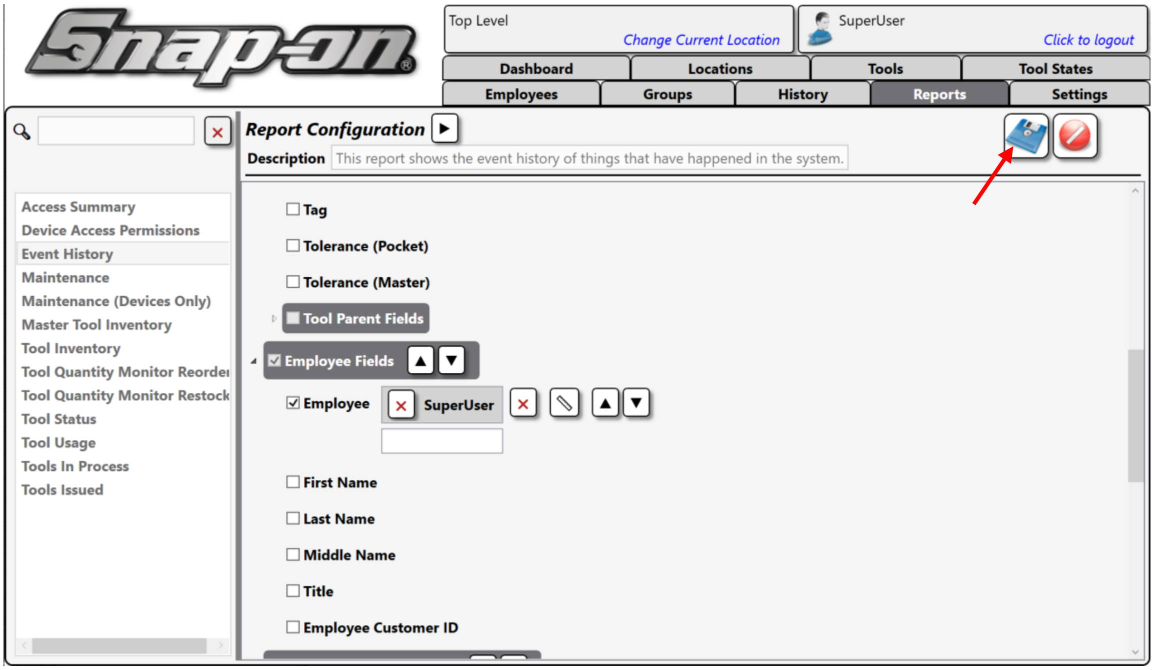


When you run the Report, you see the results. Using this view, you can change the order of the columns, remove unwanted columns and change the column width to suit your preferences and needs.

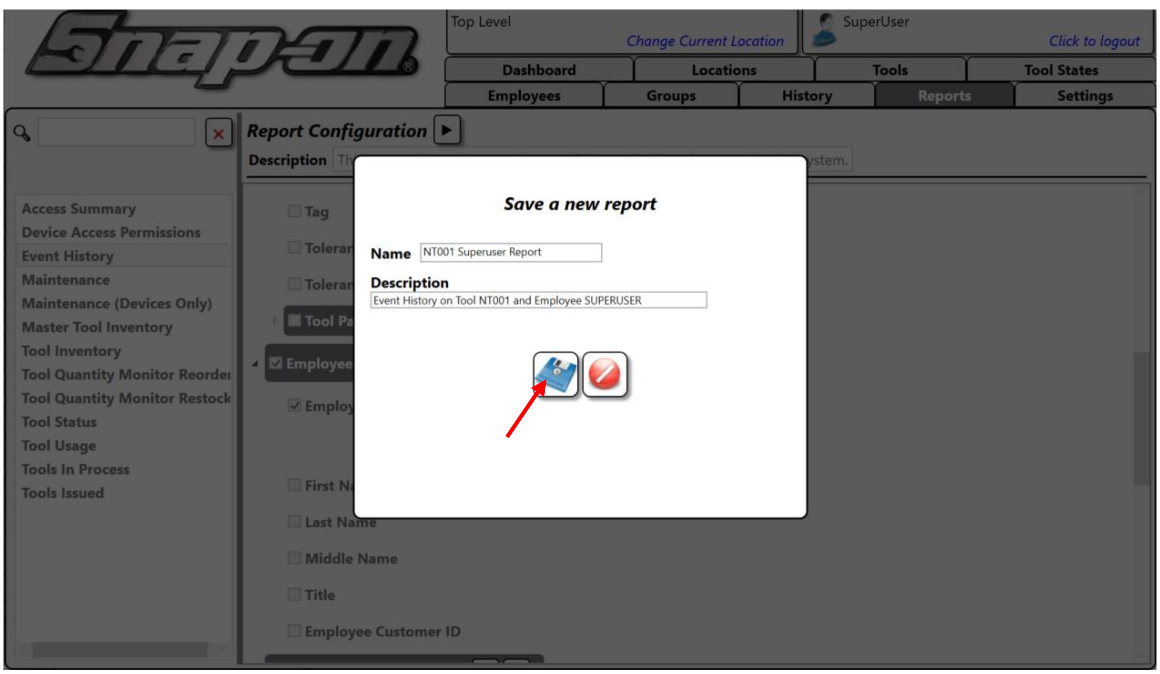


When the Report looks good, you no longer need to make any additional modifications. You are ready to SAVE the new **Personal Report**.

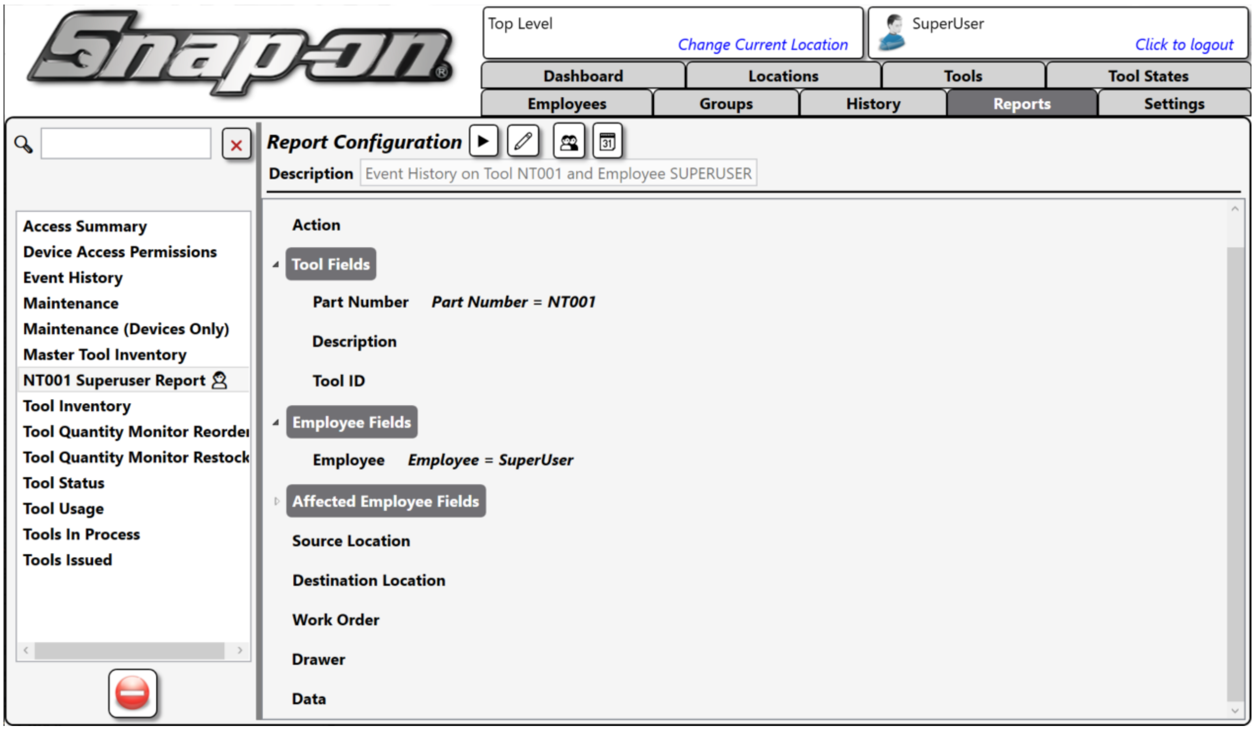
To Save the Report, close the results page and click on the SAVE button in the upper right of the screen.



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**.



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



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 button at the bottom of the list to delete it.

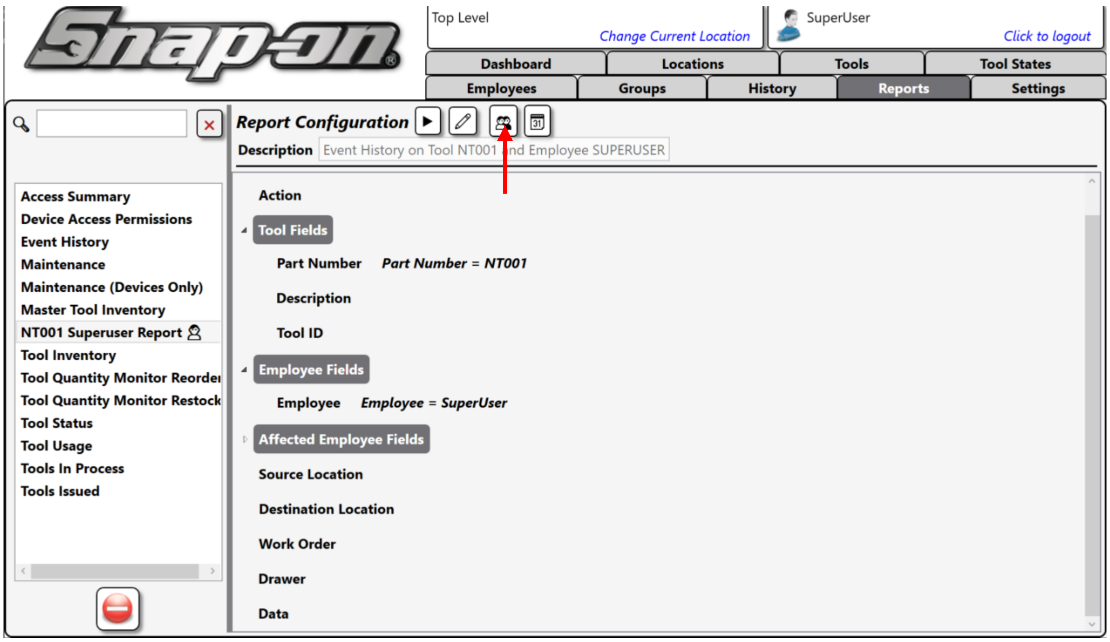
NOTE: A personal Report can be deleted but the built-in reports cannot. Once deleted it cannot be restored.

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.

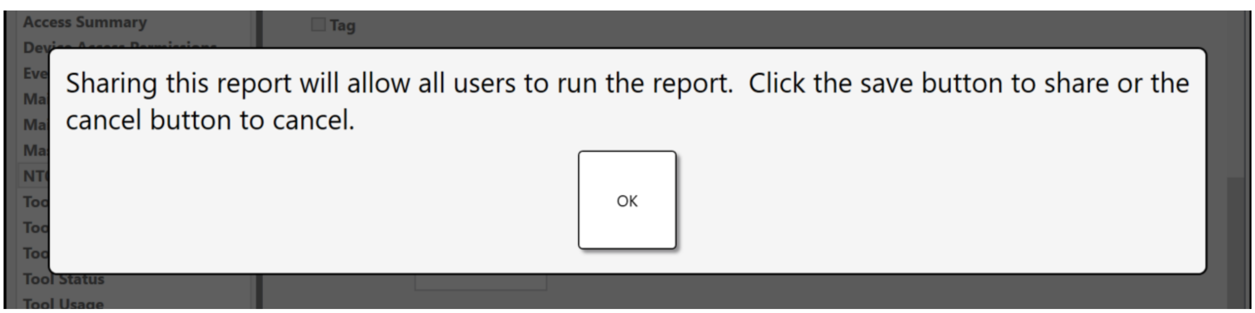
Sharing a Personal Report

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 button at the top of the **Report Properties** sub-screen.

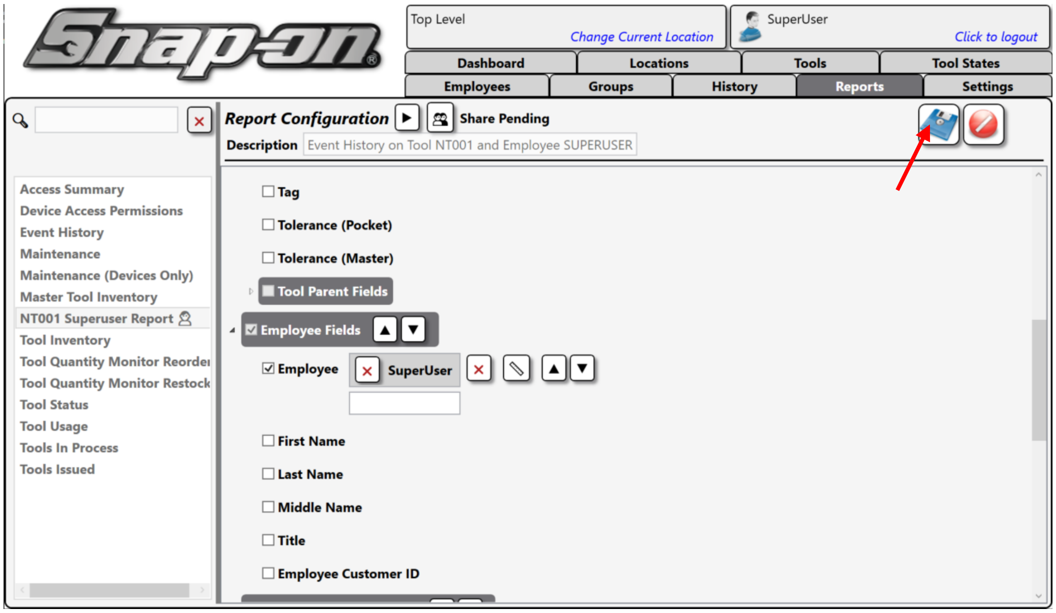


You will be presented with a warning dialog explaining that you can save or cancel the share on the next screen.

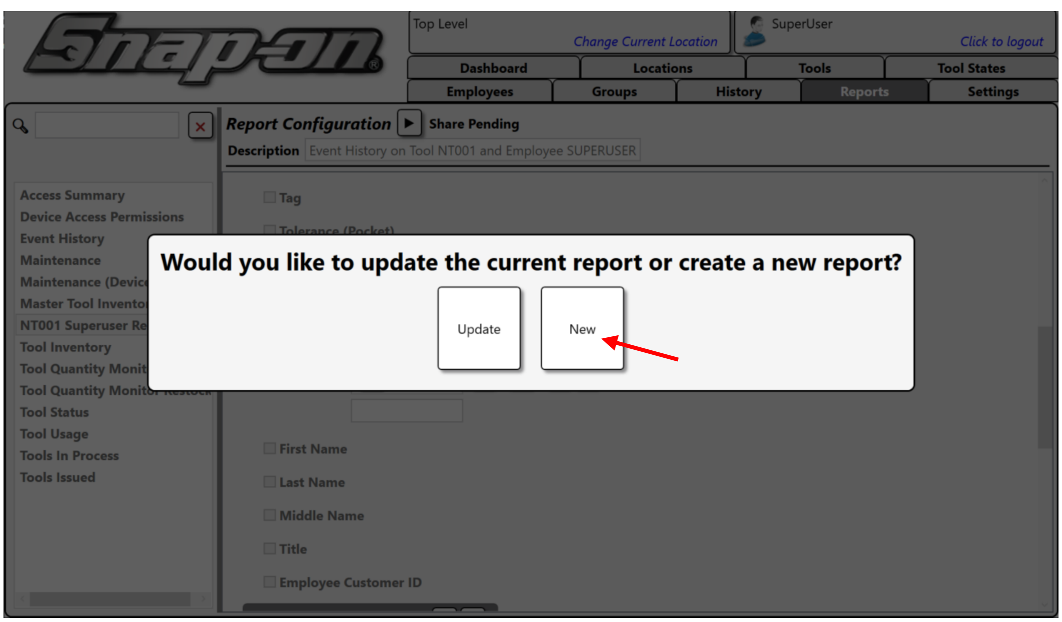


Click the OK button to continue.

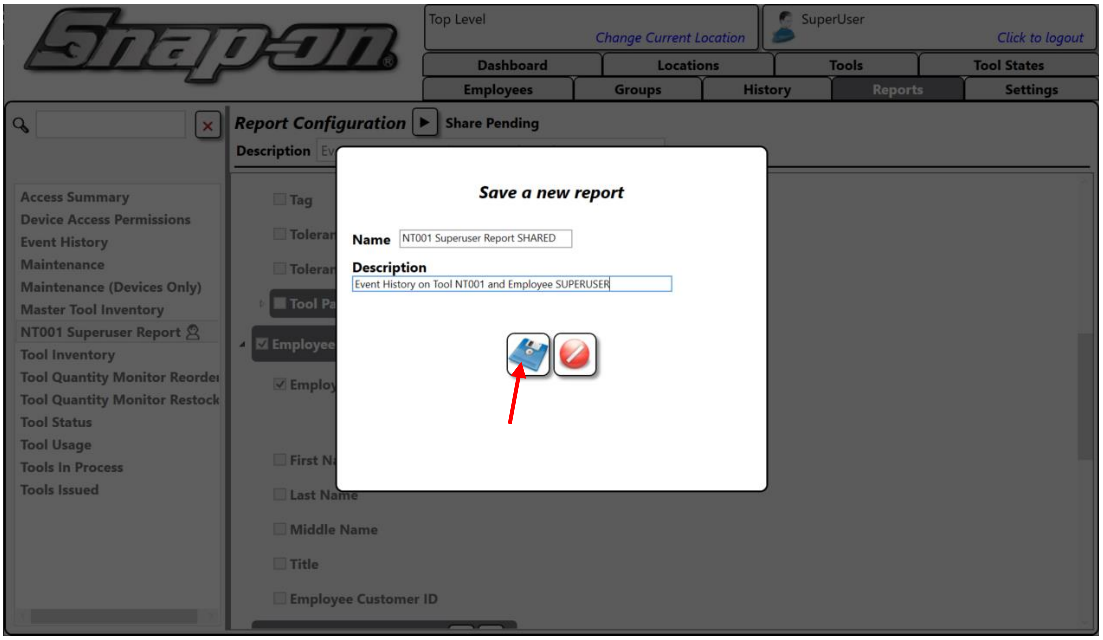
The Report will display pending shares. Therefore, you can make any modifications to it if you need to before you save it.



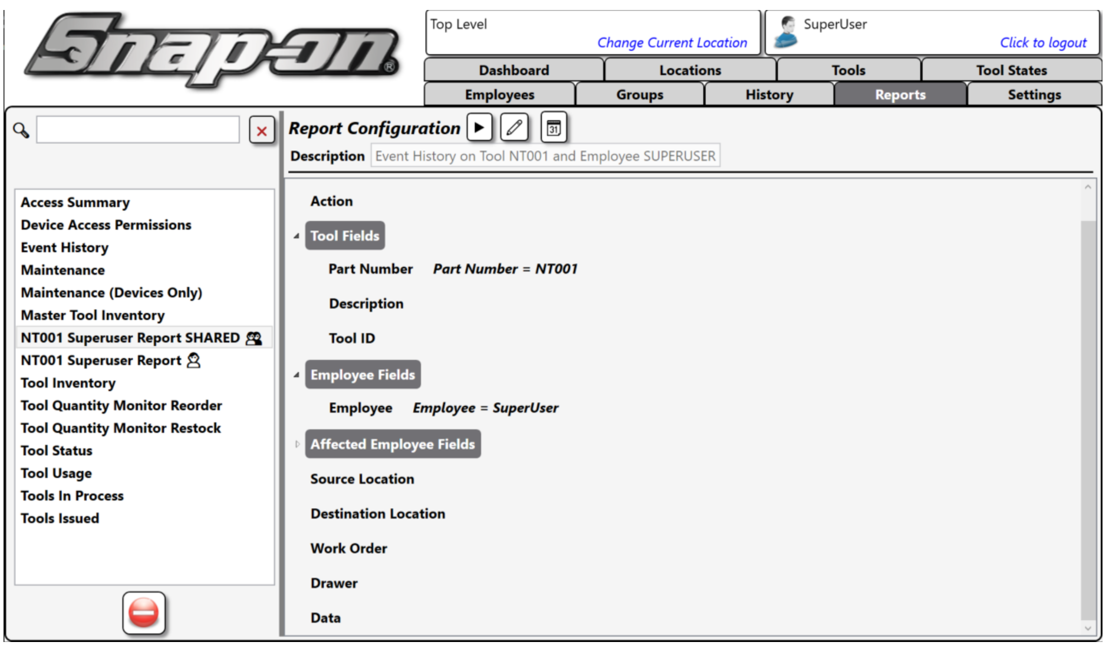
Click the SAVE button to apply the changes to the Report. You will again be presented with a dialog box. This time it will ask if you want to create this Shared Report as a **NEW** report or just **UPDATE** and convert the existing one to a Shared Report. You want to create a new one because you want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



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.



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.

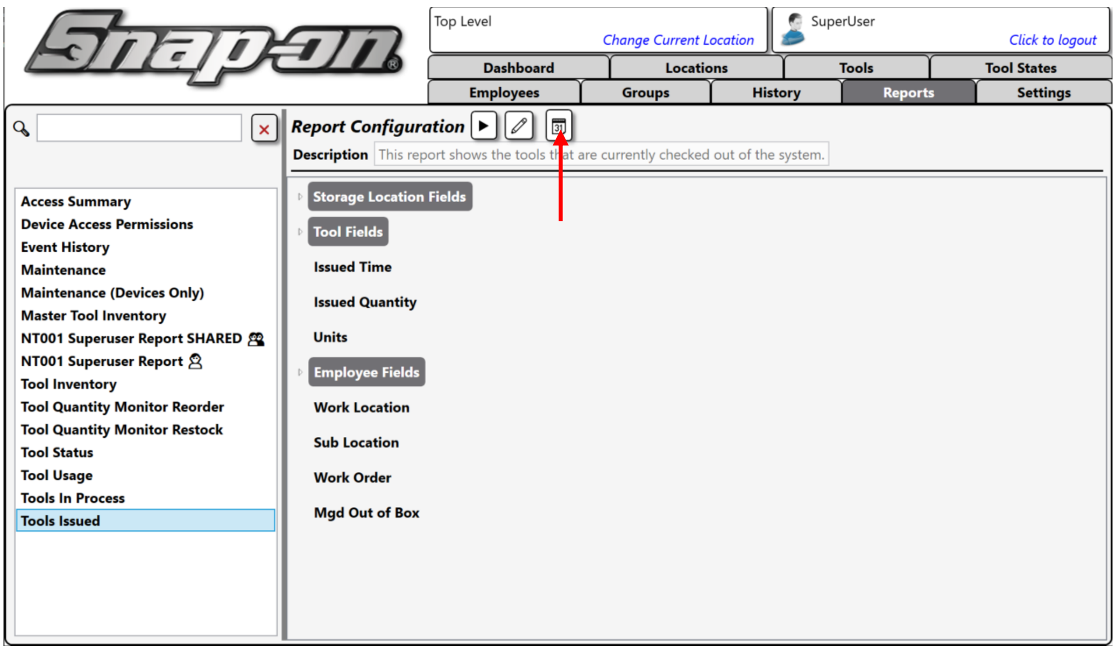
Scheduling a Report

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.

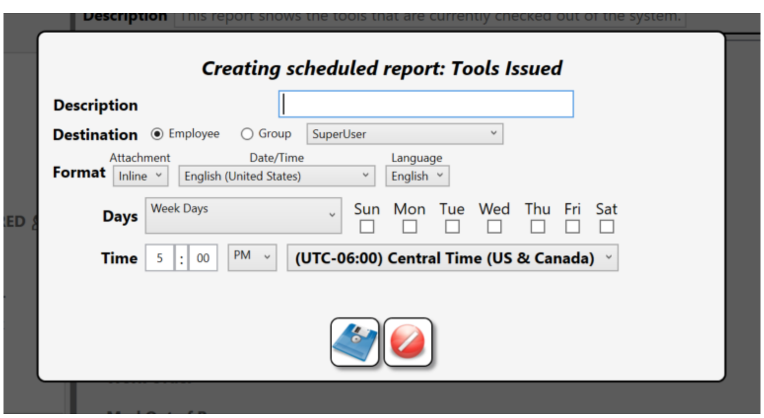
For example, you want a report each day that lets you know what tools are still issued at the end of the workday. You can schedule the Tools Issued Report to generate each day at 5 PM. You can then assign the Report to be delivered to each of the supervisors so they can take any action if needed.

NOTE: You will need to have set up the SMTP settings and email addresses of the intended recipients beforehand as these reports are emailed.

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



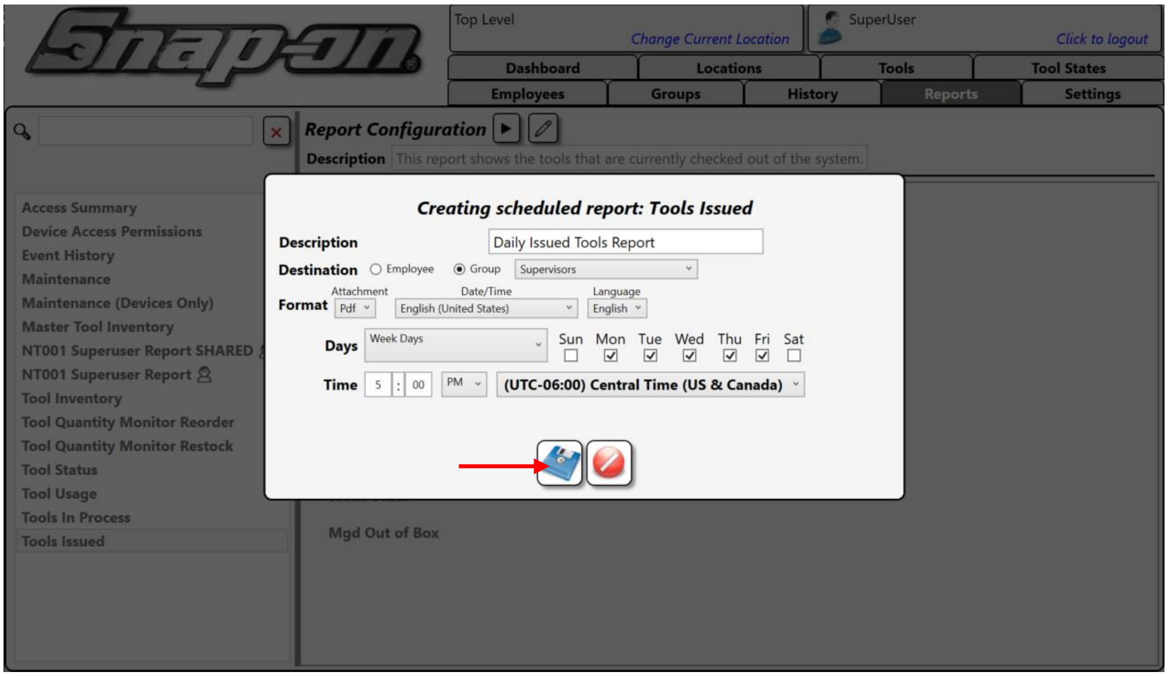
This will open the Schedule dialog.



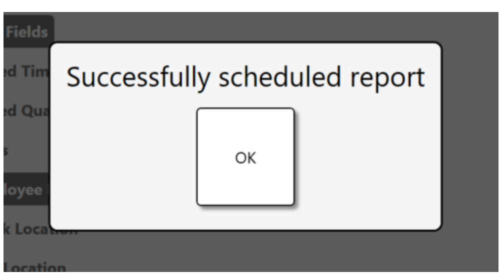
You can now fill out the schedule information to fit our example.

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

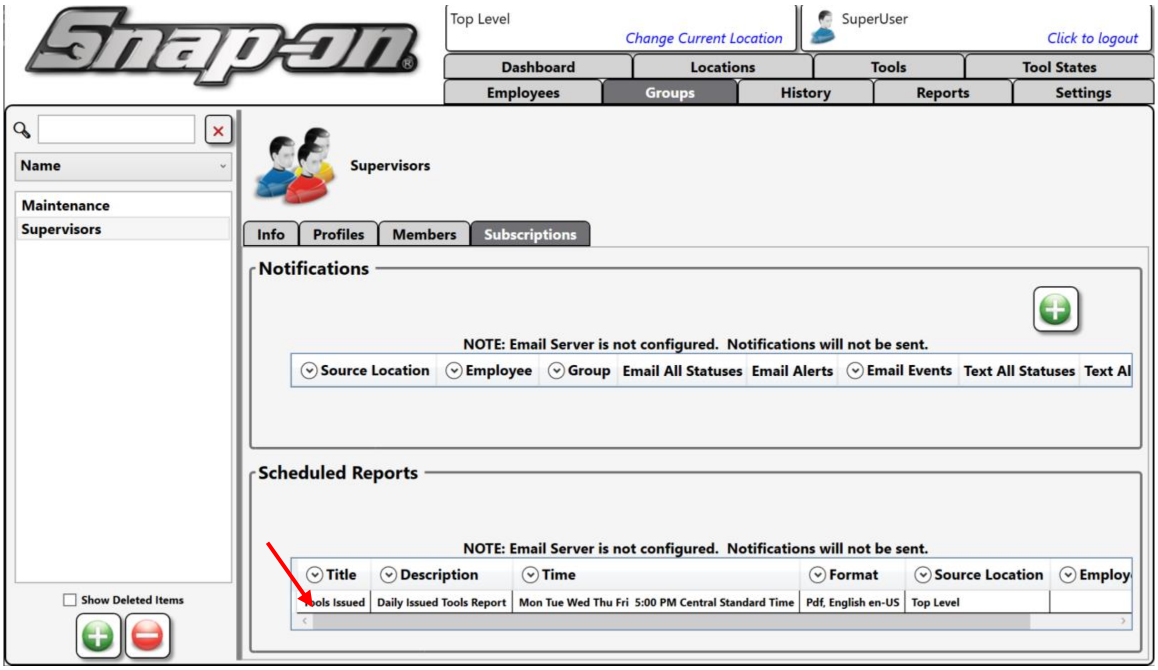
Once entered, click SAVE to set the schedule.



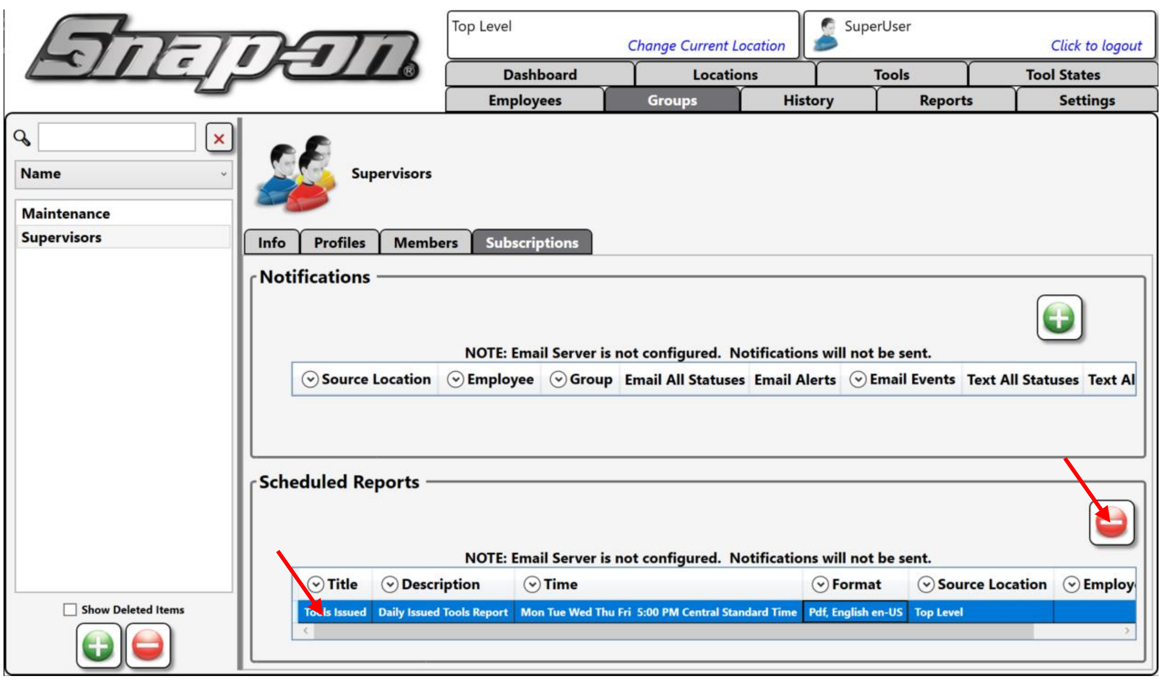
You will receive a confirmation dialog when the schedule has been set.



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.



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



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™ Admin Client.

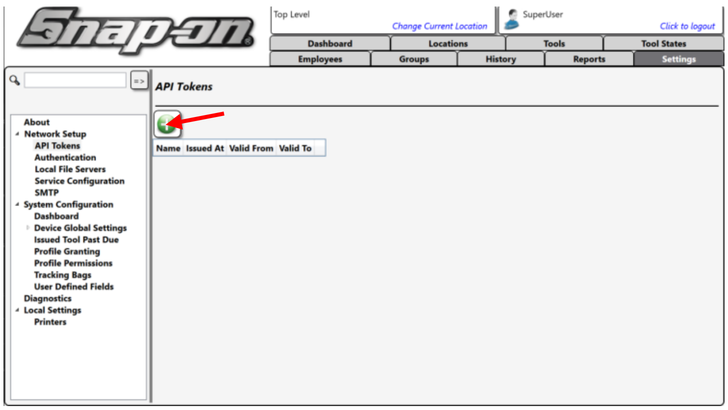
About

This screen will display the current software version the L5 Connect™ Service is running.

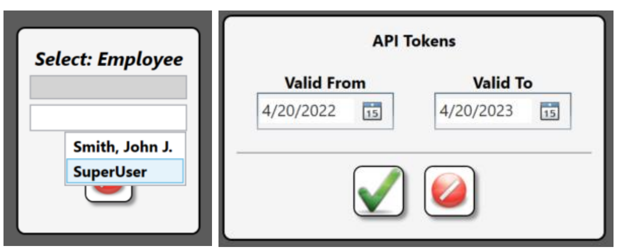
Network Setup

API Tokens

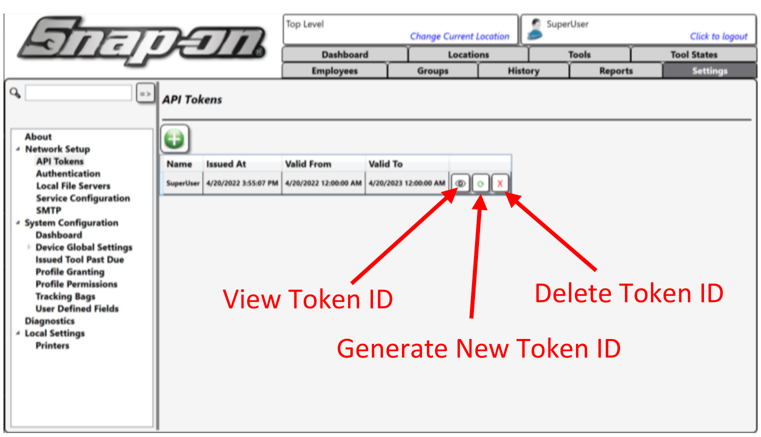
This screen allows you to create and assign tokens used for API access. This feature requires an Advanced License. To generate a token, click on the CREATE button.



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



The Token is now created.



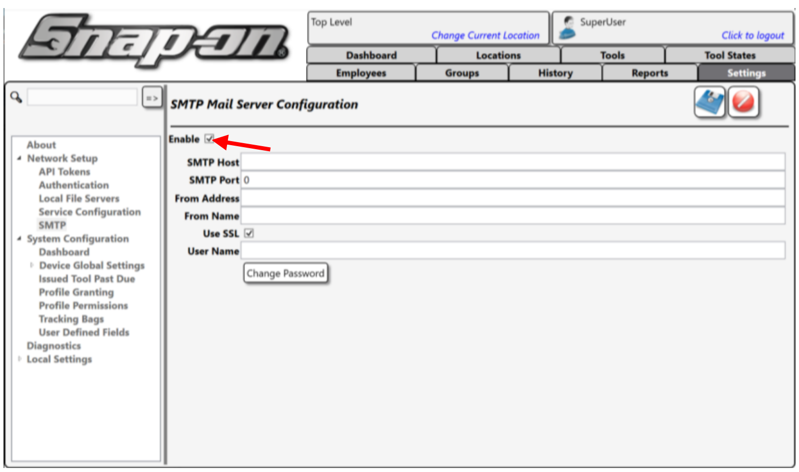
Service Configuration

These are the settings to connect your Admin Client to a L5 Connect™ service running on a Windows-based 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™ 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™ 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.



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.

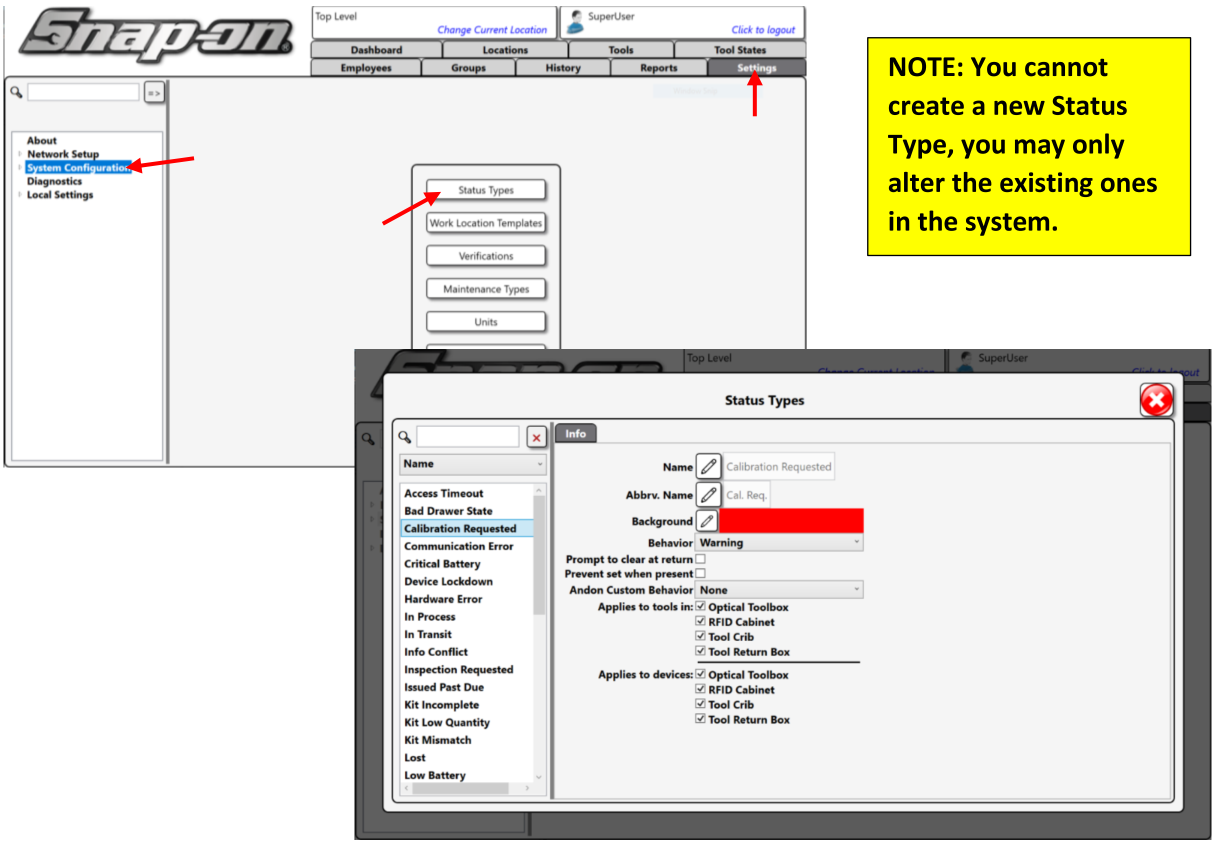
SMTP Host – the e-mail server that will handle SMTP request
SMTP Port – the port that the SMTP server will communicate on
From Address – the e-mail address that will be used to send messages
From Name – The name that will appear on e-mails sent from L5 Connect™
Use SSL – setting to enable SSL encryption
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™ system uses **Status Types** to inform you of the current state of a **L5 Connect™ 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.



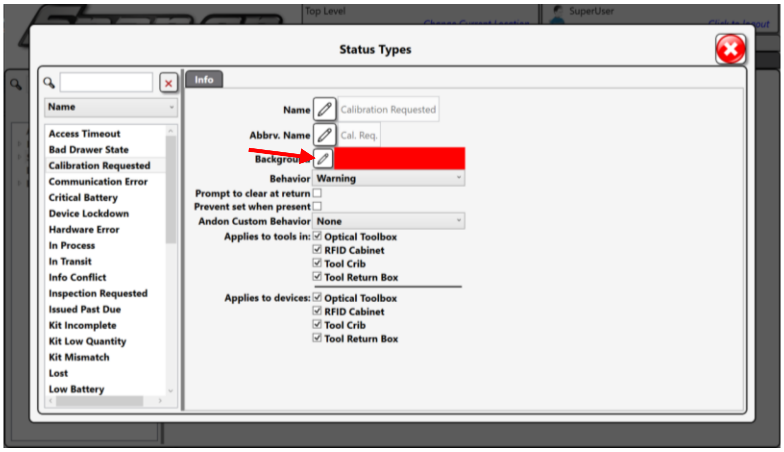
NOTE: You cannot create a new Status Type, you may only alter the existing ones in the system.

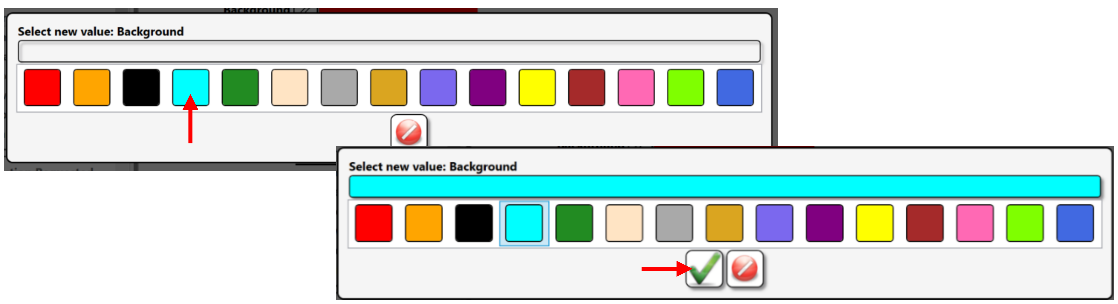
The properties of the Status Type are:

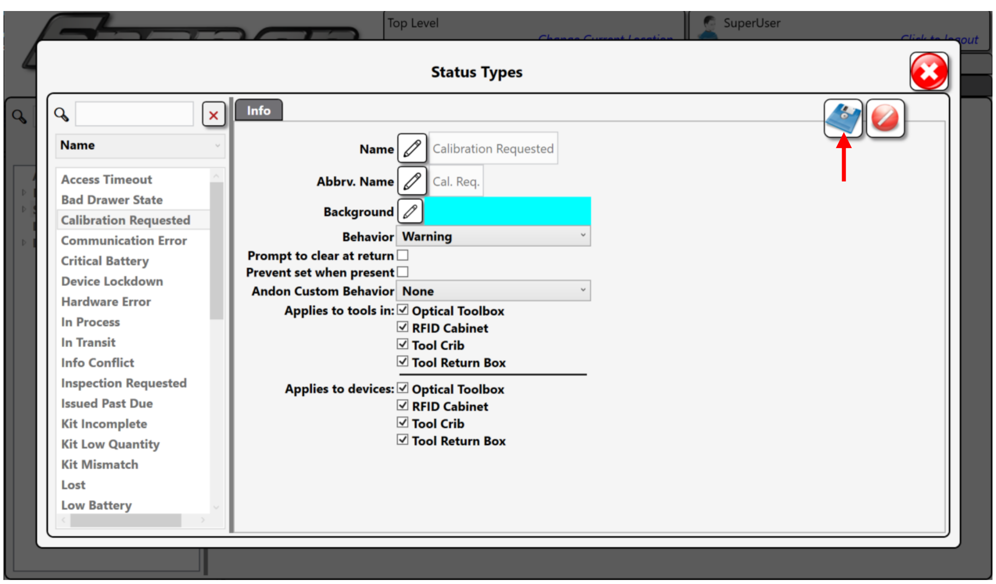
Name
Abbrv. Name
Background
Behavior
Prompt to clear at return
Prevent set when Present
Andon Custom Behavior
Applies to tools in
Applies to devices

Background

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







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 ⓘ 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")

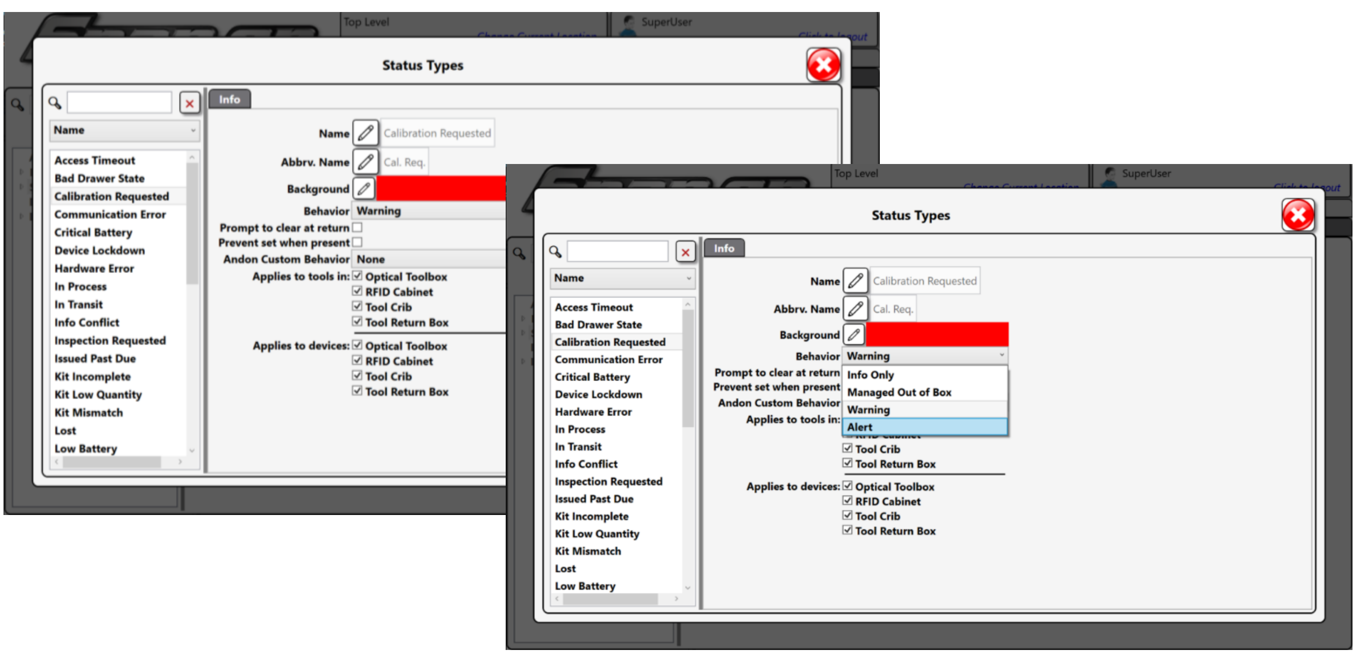
Warning

- 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**.**



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™ 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™ Service.

Local Settings – Printers

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

APPENDIX A – L5 Connect™ Permissions

Employees		
	Add/Remove	Add and remove employee accounts
	Admin Client Access Edit	Promote a standard Employee account to an Admin account and set a username & password
	Badge Edit	Set, change, and clear the RFID badge of an Employee
	Contact info Edit	Edit the E-mail, Cellphone number, and Cell Carrier of an Employee account
	Contact info View	View the E-mail, Cellphone number, and Cell Carrier of an Employee account
	Info Edit	Edit the properties of an Employee account
	Info View	View the properties of an Employee account
	Photo Edit	Add, remove, and change the photo of an Employee account
	Temp Badge Edit	Set, change, and clear the temp RFID badge of an Employee
Locations		
	Device Edit	Change the properties of a Tool Control Device
	Device Move	Change the Location of a Tool Control Device
	Info View	View Information about a Location
	Issue Tool to Work Location	Assign Tool to Work Location in Selected Location
	Issue Tools From Device	Check out Tool from Device in Location
	Notifications Edit	Change Notification Settings for a Location
	Organizational Location Edit	Change Org Location Object Properties
	Tool Crib Attendant	Enables Employee to sign in as Crib Attendant
	View 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		
	Access	Access a device to check out/in tools
	Access with Multiple Device Issued Tools	Disable to deny users log in at a device if they have tools issued from another device.
	Add/Remove from Service	Add/remove a device from a service
	Audit	Enables Audit Mode Access

	Bypass Biometrics Access	Disable this option to require Biometrics for Device Login
	Bypass 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

	Repair Requested Set	Set Status Repair Requested
	Replacement Requested Clear	Clear Status Replacement Requested
	Replacement Requested Set	Set Status Replacement Requested
	Status Change for Other Issued Tool	Change Status for tool issued to another user
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

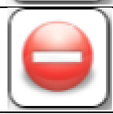
APPENDIX B – L5 Connect™ Licenses

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
	ADMINISTRATION MODE
	IMPORT WIZARD
	DIAGNOSTICS

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