

ELTON Configuration Guide

Welcome to ELTON (Equipment Location Tracking ONLINE)

This document is intended for system administrators or others that are responsible for configuring the installation. While ELTON is a pretty straightforward application there are a few configuration details and settings that are important and others that make things easier. It is advised that you read this document through to the end and then after fully comprehending how the application works and is configured, go back and make the changes required for your installation. If you require assistance contact us at support@accountabilitycorp.com.



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AccountAbility About Us (TAB)

This tab is your resource center for documents and videos that will assist in installation, loading data and use of ELTON. There is a short training video on the About Us page that is highly recommended as your first step in understanding what ELTON does and how to do it. In addition there are links to lots of useful documentation. Many of those same documents are linked to the appropriate section of this document. All documentation is hosted on AccountAbility Web server and not on Salesforce servers. This allows us to update documentation as required.

Security Settings

We deliver ELTON with appropriate security settings for most installations. Be aware of two important facts about security that you may need to address.

Read-Write fields on Equipment Object

Even though we set some fields on the Equipment object as read/write, they are updated by functionality and are not intended to be updated by users directly. To ensure the integrity of the system please ensure that regular users do not update these fields directly. Due to the design of Professional and Group editions of Salesforce, the package is delivered with most fields set to read/write

List of Fields to not update manually

1. All Fields that start with the word Assigned
2. All fields that start with the word Loan
3. Quantity on Hand

ELTON Updates and Field Security

When updates are pushed into your organization from AccountAbility the default setting for field security is not visible. When we do an update you may need to set the visibility on new fields to visible in order for your users to see and use the new fields.

There are two valid approaches to field security. You may use the Edit Layout on the Equipment Screen and drag the fields onto the layout, or use the Setup > Create > Objects > Equipment then select each field and click Set Field-Level Security to set Visibility by profile.

Tech Support Fields section on Equipment Screen

We deliver ELTON with a section on the Equipment screen called Tech Support Fields. If you are running Group Edition this section is required for your installation to function. It is recommended that users use the collapse section control

▶ **Tech Support Fields** to hide the contents of this section from users. Clicking the triangle next to Tech Support Fields will toggle between hide and display of this section.

Edit Layouts

For Enterprise and Performance users you may use the Edit Layout utility to change screens as desired. For Professional and Group Edition customers, many of the fields we display are actually needed for the product to work correctly. For example if the QR Code Equipment ID field is removed from the layout the field will not be updated correctly and QR Codes will not work. This is one of the limitations placed on Professional and Group edition customers. We use Visualforce Pages for both our Google maps integration and our QR Code generation. Do not enable the New buttons on Equipment Assignments, Equipment Loans or Equipment Quantity Adjustments as those records are created using buttons on the Equipment record.

Related Lists on Contact, Account and Opportunity

In order to view the Current Assignment, Current Loan, Historical Assignment and Historical Loan related lists on Contact, Account and Opportunity you must use the Edit Layout to add these lists to the Page Layouts. Turn off the New buttons on all related lists. These records must be created by using the buttons on the Equipment screen or through the AccountAbility Mobile Scanner app.

Consumable

Consumable equipment records are designed to record items that are shipped to a User, Contact, Account or Opportunity and will never be returned. This feature requires additional licensing at an extra cost to the basic ELTON functionality. Contact AccountAbility Solutions to obtain pricing information and obtain a license key.

Equipment Pools (formerly called Use Quantity on Hand)

The intent of the Equipment Pool field and its related fields is to provide the capability of tracking equipment that has multiple copies available (IE Shovels, Cables, etc). The Quantity on Hand represents the number of copies available on the master record and Quantity on Loan shows the quantity currently on Loan. Assignments for Quantities are not supported. We do not validate the Quantity to prevent negative numbers, since you may require the number to go negative for a short duration.

Equipment Pool

This checkbox field controls if the Quantity on Hand field is to be used for this Equipment record. Setting this toggle changes the way both mobile screens and web screens process Loans. If the Equipment Pool is set to checked, the loan screens will ask for the Quantity to associate with the Loan. In addition to Loan Quantities the Mobile app and Web screens support adjustments to the Quantity on Hand. Both options only appear when Equipment Pool is checked. This field also controls if multiple loans can occur at the same time. For equipment records that have Equipment Pool checked the system will allow users to have multiple active loans. Quantities are not validated so it is possible to loan more equipment than you have recorded. The Current Loan section on the equipment record will display the latest Loan record created that is still active (not returned). The Equipment Loan related list will show the other active and historical loans. The auto loan return functionality that works for standard equipment records is turned off for Equipment Pool equipment records. That means loans must be returned individually by selecting the loan and using the Return Loaned Equipment button on the Equipment Loan Detail page.

Changing the setting on Equipment Pool should be done with careful consideration. Ideally there should be no outstanding loans when you change Equipment Pool from true to false or visa versa. If you use the Change Equipment Record Owner custom setting, be aware that each loan causes the logic to fire and record ownership may change as each loan is processed based on the record owner of the loanee.

Quantity on Hand and Quantity on Loan

These two fields display the appropriate values for on hand and on loan summary quantities. Use security settings in your Org to make both of these fields read-only. Changes to the Quantity on Hand will be done with the Quantity Adjustment button.

Reservations

Reservations do not support quantities.

Loans

When processing a Loan for a record that has Equipment Pool checked, the system will ask for a Quantity value. This quantity value will always be a positive number. This Quantity Value will be stored with the Loan record and the Quantity on Hand of the related Equipment record will be reduced by that amount.

Return Loan Button

Return Loan functions differently for Equipment Pool records. The Return Loan button displays a message that tells the user to select the Loan they are returning. Users must then navigate to the Equipment Loan record and press the Return Loan button on the Equipment Loan Detail screen. When the Loan is returned the system will not ask for the Returned Quantity (utilizing the Loaned Quantity), and will increase the Equipment record by the loaned quantity. If a loan has returned fewer items than loaned, you must return the loan (returning the full amount) and then enter a Quantity Adjustment to record the shortfall.

Quantity Adjustment Button

This button allows you to adjust the Quantity on Hand either positive or negative. Use a positive number to increase the Quantity on Hand and a negative number to decrease the Quantity on Hand. You can also select the date of the adjustment and enter an adjustment note. These adjustments are recorded in the Equipment Quantity Adjustment related list as Regular.

Equipment Quantity Adjustments (Related List)

Each time a Quantity record is adjusted a record is created in the Equipment Quantity Adjustment object. This serves as a log of all quantity adjustment regardless of source. This is designed to assist in historical reporting and troubleshooting with various quantity issues.

Possible values for Adjustment Source are;

- System – created if Quantity on Hand does not agree with record totals
- Mobile – this record was created from the mobile app
- Regular – this record was entered using the Quantity Adjustment button
- Loan – this record was created as a result of a Loan transaction
- Load – this record is created if a Data Interface record is created by loading data

Possible values for Adjustment Types are;

- Regular – created by Quantity Adjustment or mobile quantity adjustment
- Loan – created by initiating a loan
- Loan Return – created when a loan is returned
- Opening Balance – created by the system if Quantity on Hand does not reconcile with records
- System Generated – created by the system if Quantity on Loan was adjusted after a loan was returned

Print Equipment Labels

We have a built in label production system within ELTON. To make this button available you must Goto > Setup > Create > Objects > Click Equipment and scroll to Search Layouts. Click Edit next to the Equipment List View and Add the Print Equipment Labels button to the Selected Buttons list, click save. The Custom Setting that contains the label layout information must be created before labels can be printed or you will receive an error message. Read the section in this document called **QR Codes** for detailed steps on how to add the custom setting with the label layout information.

Request Fulfill Screen Customization

Equipment Request Fulfill Screen is a custom VisualForce page that finds available equipment to fulfill an equipment request. Since this screen is not a standard force.com layout we provided customization in a different way.

Custom Labels

If you navigate to Setup > Create > Custom Labels you will see a series of labels related to the Equipment Request Category. Edit these labels as desired to over-ride the labels on the screen.

Field Set – FulfillEquipmentRequest

If you navigate to Setup > Create > Objects > Equipment and then select the FulfillEquipmentRequest Fieldset, you may change the fields displayed and their display order on the Fulfill request screen.

Custom Settings and Configuration Options

There are several custom settings that control how ELTON works under certain circumstances. Below is a list of features that can be controlled by Custom Settings and Configuration. To enable or change the feature below please contact AccountAbility Solutions.

- Additional date fields on Loans
- Changing record ownership on Loan and Return
- Recording the Billing or Shipping address on Account
- Configuration of Equipment Calendar and color scheme
- The body of Chatter posts
- Displaying Tabs on Mobile App
- Displaying Additional fields on Mobile App
- Hiding Assignment or Loan selections (User, Contact, Account or Opportunity) on Mobile App
- Custom Object Integration
- Recording the shipment of a return loan prior to actually returning the loan
- Re-assigning the Equipment automatically at the start or return of a loan
- Configuration of the Equipment Labels content and field mapping
- Automatic Assignment on Equipment add or clone
- Field sets to Copy fields from Request to Reservation
- Fields to be updated on the Assign, Reserve and Loan VF Pages
- Controlling the triggers that are used to keep Assignment and Loan data updated on the Equipment record
- Validation to prevent/allow Loan dates in the past
- Validation to prevent/allow Reservation dates in the past
- Enable Consumable records (separate license at additional cost)
- Allow Consumables to go negative
- Control default Margin Before/After Request dates, globally or by User
- Allowing Inactive Equipment to be Reserved
- Control which Statuses will allow for Reservations

Help for this Page

We utilize the Help system for all our pages. We provide field by field reference guides for each page by clicking on the “Help for this Page” link on the top right corner.

Access to Send Email

We utilize Emails for several features; please ensure your organization has Access to Send Email set to All Email. Go to Your Name > Administration Setup > Email Administration > Deliverability to ensure proper setup.

Data Loading

It is recommended that prior to loading data you use the Custom Setting to turn off Assignment Chatter and Loan Chatter. If these settings are on each Assignment or Loan loaded will create a Chatter post.

Data loading into ELTON can be done with the Import Data Wizard, APEX DataLoader or other 3rd party data loaders. It must be done in a specific order due to the internal structure of the objects. We have had success with the dataloader.io product available on the AppExchange. Dataloader.io allows Professional Edition customer the ability to control load batch sizes without the use of the APEX dataloader.

Load Equipment data

We provide a data load template for the equipment file. Navigate to the AccountAbility About Us page for a link to download the latest version of the Equipment load template. Make sure you do not try to load Assignment or Loan data at the same time. If you are using equipment collections (described later) you need to load equipment master records prior to loading equipment components.

Load Assignment and/or Loan data

Once you have successfully loaded equipment you may optionally load assignment or loan data. This requires the use of the APEX DataLoader or dataloader.io as relationships are set using the Salesforce ID's. This requires some level of experience with the APEX DataLoader. We have more detailed instructions on loading [assignments and loans](#). If using equipment collections, you only load the assignment and loan data for the equipment master record, collection component records inherit the assignment and loan data from the master.

Data Interface

The data interface object and its related object is used to acquire data from other sources and also is how our Mobile App processes transactions in ELTON. These objects need permissions for all users to all fields; however, it is recommended that that Data Interface Tab be set to hidden for all users.

Equipment Calendar (TAB)

This tab uses a javascript presentation to allow users to see and edit reservations and loans in a scrolling Gantt like calendar view. This feature can be customized to control fields displayed in hover-over tiles and the color scheme used for indicating record types. We provide more detailed documentation on how to configure the [Equipment Calendar](#).

ELTON Scanner

Our mobile app is the key to getting accurate equipment tracking. By using our mobile app users can scan a QR Code or Bar Code associated with a piece of equipment and then change assignments, loan, return a loan, count or just view an equipment record. We publish the ELTON Scanner app for iOS and Android. There are certain hardware features that are required so some older models of hardware are not supported. Apps can be downloaded using the links below or

search ELTON Scanner on App Store or



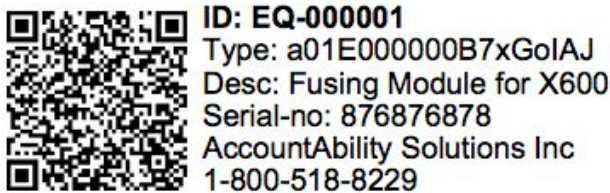
Google Play.



QR Codes

ELTON generates a unique QR Code for every record in the Equipment Object. The mobile app uses these QR Codes to link the physical equipment to the correct record in ELTON. You may use QR Codes or Bar Codes to attach and identify equipment. If you wish to use QR Codes there is a basic label production system in ELTON. You must first setup a Custom Setting that ELTON uses to determine the data to be displayed on the labels.

ELTON standard labels are designed to be printed on Avery 5162 or equivalent label stock. These labels are 1 1/3" X 4" and are 2 across, providing 14 labels per sheet.



The label layout is not editable, but the data displayed in the 6 text fields is controlled by a Custom Setting. Goto Setup > Develop > Custom Settings and click Manage next to Equipment Labels.

The Name must be set to "Equipment Labels", without the quotes, but including the space.

Field 1 – 6, can be set to the API Name of a field in the Equipment object or an entered string. To obtain the API names of fields goto Setup > Create > Objects > click Equipment. In the Standard Fields section use the Field Name, in the Custom Fields section use the API Name.

Caption Field 1 - 6, can be set to a string that will appear before the value. The following Custom Setting created the label you see above.

Equipment Labels Information	
Name	Equipment Labels i
Field 1	Name
Field 2	ELTON__Equipment_T
Field 3	ELTON__Description__
Field 4	ELTON__Serial_Numbe
Field 5	AccountAbility Solutio
Field 6	1-800-518-8229
Caption Field 1	ID:
Caption Field 2	Type:
Caption Field 3	Desc:
Caption Field 4	Serial-no:
Caption Field 5	
Caption Field 6	

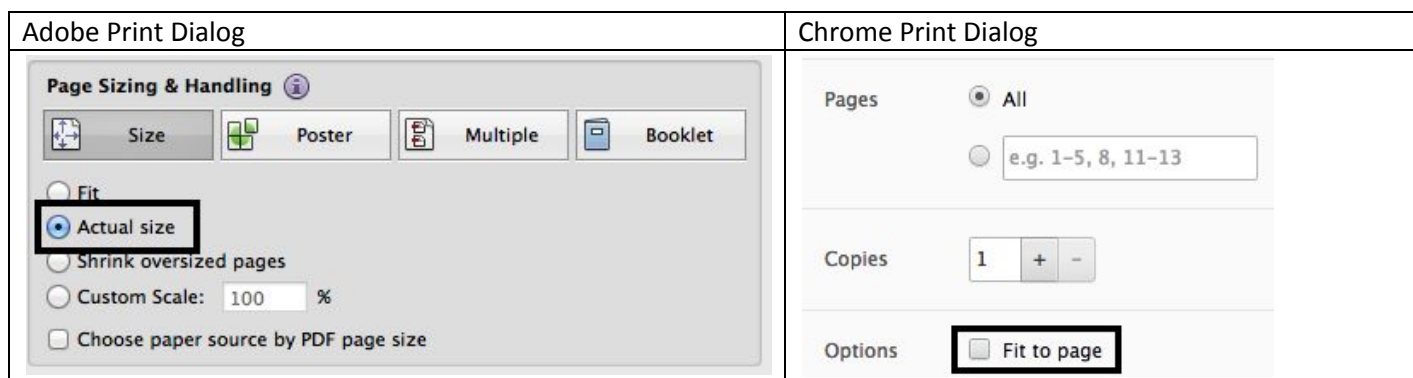
Note that the Field 1 line is always Bolded, also note that Captions that are left blank are supported.

To access the Print Equipment Labels functionality, from the Equipment tab select an equipment view (All is fine, although any view is supported), then use the check-box controls to select the records you wish to produce labels for. Use the check box above the column to select or deselect all rows. Click the Print Equipment Labels button. A short message will be displayed explaining the process. A PDF file with the labels will be produced, you may then print the PDF onto the Avery 5162 label stock.


All Edit | Delete | Create New View

Action	Equipment Name ↑	Equipment Type	Description
<input type="checkbox"/> Edit Del +	EQ-000001	Service Loaners	Fusing Module for X600
<input checked="" type="checkbox"/> Edit Del +	EQ-000025	Service Loaners	Ultra Sound X100
<input type="checkbox"/> Edit Del +	EQ-000039	Service Loaners	Docking cradle for Windows Mo

When the PDF is generated some PDF viewers scale the PDF slightly during printing. Print these pages using the “Actual Size” option. In Chrome or some PDF viewers this will default to “Fit to Page” ensure that this selection is unchecked.



The basic labels are build in with ELTON, for more sophisticated control over label content and layout we support exporting the data and then using label production software to print the labels. There is additional documentation on how to export and [print QR Code Equipment labels](#).

Bar Codes

Alternatively or in combination you may utilize Bar Codes to identify and label equipment. There are some advantages to utilizing Bar Codes.

1. You may have existing Bar Codes on Equipment
2. You may purchase pre-printed bar codes and assign tags as used
3. You can easily obtain pre-printed durable Bar Code tags
4. You can replace a Bar Code damaged in use with a different Bar Code and just key in the new value

We provide a document that discusses how [Bar Codes can be used in ELTON](#).

Setting up Equipment Images in ELTON

ELTON allows you to display an Image and Thumbnail image for each piece of equipment or by Equipment Type. The images do not need to be stored on a Salesforce instance, they only need to have a publicly available URL that ELTON can use to display the image. This document will walk through the configuration and setup of using Equipment Images.

In our final steps we will choose to store the images using the Salesforce Documents feature. You may use any publicly available URL to store your images.

We have a detailed document that discusses how to [Setup Equipment Images](#).

Collections

Collections allow you to setup groups of equipment that move as a set or kit. The terminology that we use is as follows; Collection (the group of equipment), Master (the equipment record that is at the top level of the collection), component (an equipment record that is part of a collection). To add a piece of equipment to a collection, you select a component and edit the Collection Master Equipment field to associate this equipment as a component to the master. The Master equipment record will change its Collection Status from blank to Master, the component will change from blank to component. We only support a single level of components associated with a single master. The equipment Master record, will display a related list for all its component records.

Reservations cannot be made for component equipment records. You make reservations for the master equipment record. Loans and Assignments are processed in the following manor. You may select any equipment record in a collection, when you press Loan or Assign Equipment, you will be changed to the master record for a collection. All component equipment records will be displayed. When you process the Loan or Assignment all records in the collection will be set to the same values for your Loan or Assignment.

Adding equipment to a collection that has an active loan is not allowed, you must return the loan prior to adding the component to a collection. If there is an active reservation, the component cannot be assigned to a collection. You must manually delete the reservation prior to adding the equipment to the collection. Also be aware that future reservations need to be dealt with manually. It is advised that you run a report listing all reservations for the equipment record and make new reservations as required to satisfy the requirements. Then delete the reservation records for the equipment you are adding to the collection.

Validations on Editing Loans and Reservations

Editing existing Loans and Reservations pass through several validations. The goal of these validations is to ensure that no over-lapping issues are created as a result of editing existing records. In addition basic validations are enforced to prevent historical records from being altered. The error messages produced are descriptive and should alert the user as to why the edit will not be permitted. As summary of the error codes is included here for your convenience.

The Loan Start Date must be on or after previous Loan Start Date of <i>PrevLoanStartDate</i> (EL100)
Start-date must be before or on the Estimated return date (EL-100a)
The Loan is missing a start date (EL101)
This Equipment is already on loan to this <i>LoanType</i> . (EL101b)
Automatic reassignment on Loan Return: Unable to find <i>AssignOnLoanReturn</i> with Id <i>AssignOnLoanReturnId</i> (EL-101a)
Automatic reassignment on Loan Start: Unable to find <i>AssignOnLoanStart</i> with Id <i>AssignOnLoanStartId</i> (EL-102b)
You cannot edit the Start or Estimated Return Date for Equipment that uses Quantity on Hand. (EL-103)
You cannot edit the Start Date for on a loan that is already returned. (EL-104)
You cannot change the start date of a loan where that date is in the past <i>Date</i> (EL-105a)
You cannot change the start date of a loan to a date that is in the past Previous Start Date was: <i>Date</i> (EL-105b)
Estimated Return Date on this Loan will conflict with Equipment Reservation <i>ReserveName</i> (EL-106)

Summary

This should get you up and running with the ELTON app. If you require assistance, check the AccountAbility About Us tab for documentation or contact us at support@accountabilitycorp.com