

## Labcheck Next Generation Quick Start Guide

# **Administrator Advanced**

Learn about:

- 1. Creating customized Roles in Labcheck
- 2. Searching and moving users in the hierarchy
- 3. Modifying accounts
- 4. Applying equipment restrictions for worksites

#### **Data Access & Roles**

Labcheck gives you the ability to be the administrator for your company. The Admin tab lets you add and manage users, assign permissions and roles to users and modify accounts.

When setting up a new user there are two things to take into account – Data access and Roles. See definitions below:



### **Data Access Explanation**

Below is an example of Data Access, because our user is set up at the Region #1 folder, online he can view Region #1, Worksite #1, #2, and #3.



## **Roles Explanation**

When setting up a new user you must assign a role to them. Roles determine what features a user has access to. By default most users are set up as Sampler + Reports. Below explains each default role:



#### **Administrator**

- Manage users, Add/Modify user accounts
- Equipment management, Move/Update unit & component records
- Run Management Reports



#### Manager

- Equipment Management, Move/Update unit & component records
- Run management reports



#### Sampler + Report

- Can only view Equipment / Print Labels
- Run management reports



#### Sampler

Can only <u>view</u> Equipment / Print Labels

## **Creating a Custom Role**



To create a customized role for an individual worksite, select the **Worksite** from the hierarchy tree on the left side of the page. If you want the custom role to be applied to multiple locations, select the **Master Folder** in the tree. On the right side, click on the **Roles** tab and then click the **Add** button

## Creating a Custom Role

NEXTGENERATION	Add Role				×	Silboy 👻 Li	ast login on 12/23/
HOME SAMPLES E	Name*					Quick	: Search
ustomer Hierarchy	Demo Role						
arch for Users, Company, Site	Hanage Osers						
Acme Lubricants, Top Mas	🕜 Manage Units						
Acme Lubricants Inc, JC Market Stress	📄 Manage Reports						
Abel Construction Co	Register Samples					er Sampl	Manage Reports
Abel Construction Constructi							
Adell Plastics, Balti, N							
AFOLINO, AFOLINO C							
Ameresco, AMERESC				Save	Cancel		
American Contractor:				Jave	Cancer		
American rennis Cour							
		A new win new role a access to	dow will open w nd <b>check mar</b> Once comple	where yo <b>⁄k</b> which <sup>•</sup> te click o	ou <i>must</i> features on the <b>Sa</b>	assign a this role <b>ve</b> butto	name to yo will have n

### **Modifying/Deleting a Role**



Once saved the new role will appear in the roles table. To modify or delete a role, click on the **Role Name** (the row will highlight in gray) and then click the **Modify** or **Delete** buttons

### **Searching for Users**



Find users or locations easily by using the **Search Bar** on the left side of the screen under **Customer Hierarchy**. You can search for a user by entering their name or email address. Or you can search for a location by entering the company name. A drop down list will appear with results that match your search criteria. Select the user or company you're searching for by clicking on the name in the list

## **Searching for Users**

				Select Frank Gilboy <del>-</del>	Language English→
HOME SAMPLES EQUIPMENT LABELS REF	PORTS SETTINGS AD	MIN		Qu	iick Search
L Customer Hierarchy	Details				
John Smith ( johnsmith5@email.com )	Users Roles				
<ul> <li>Acme Lubricants, Top Master</li> <li>Acme Lubricants Inc, JONESTOWN F</li> <li>Users</li> </ul>	Add Modify	v Delete R	eset Password		
Abel Construction Co. Ind, MOUN	Username	Full Name	Email	Online Role	Company
<ul> <li>Isers</li> <li>John Smith</li> <li>Abel Construction Company Inc,</li> <li>Abel Construction Company Inc,</li> <li>Adcock'S Systems, Llc, ADOCK'S</li> <li>Adell Plastics, Balti, MD</li> <li>AFOLINO, AFOLINO OAKMONT, PA</li> <li>AFOLINO, AFOLINO OAKMONT, PA</li> <li>Aleris Recycling Inc, Friendly, WN</li> <li>Ameresco, AMERESCO GOSHEN N</li> <li>American Contractors Equipment</li> <li>American Paving Corp., SHOP</li> <li>American Tennis Courts, Inc</li> </ul>	johnsmith5	John Smith	johnsmith5@em	Sampler	Abel Constructio
	Click to w you	king on a use here they are to the worksi	er will automat e set up. Click te folder	ically open ing on the v	up the hierarchy vorksite will bring

NEXTGENERATION				Frank Gilboy +	Last login on 12/23/2
HOME SAMPLES EQUIPMENT LABELS	REPORTS SETTINGS AL	MIN		Qu	iick Search
. Customer Hierarchy	Details				
Iohn Smith ( johnsmith5@email.com ) 🔍	Users Roles				
<ul> <li>Acme Lubricants, Top Master</li> <li>Acme Lubricants Inc, JONESTOWN F</li> <li>Users</li> </ul>	Add Modif	y Delete	Reset Password		
Abel Construction Co. Ind, MOUN	Username	Full Name	Email	Online Role	Company
4 🔞 Users	iohnsmith5	John Smith	iohnsmith5@em	Sampler	Abel Constructio
John Smith	Jonnonneno	John Childre	jonnonnano e ann	oumpror	Aber constructio
Adea chis Systems Lie ADOCK'S					
Adell Plastics Balti MD					
Aleris Recycling Inc. Friendly, W					
Ameresco, AMERESCO GOSHEN N					
American Contractors Equipment					
American Paving Corp., SHOP					
🕬 American Tennis Courts, Inc					

*multiple by moving to the master folder*) in two different ways. First select on the *worksite* the user is currently set up at on the left. On the right, click on the user and *hold* your mouse down to drag and drop him on top of the new location you want them to be at. Release your mouse when you see the new location highlighted in blue with a small green arrow and the username with a green checkmark

014

?

	Save User	×	Gilboy 🗸	Last login on 12/23/2014
HOME SAMPLES E	Username*	First Name*	Quid	ck Search
L Customer Hierarchy	johnsmith5	John		
John Smith ( johnsmith5@email.	Last Name*	Job Title		
🖌 🎫 Acme Lubricants, Top Mas	Smith			
a 🔤 Acme Lubricants Inc, JC	Email*	Confirm Email		
Wo Users     Abel Construction Co	johnsmith5@email.com		Role	Company
⊿ 🕼 Users & John Smith	Phone	State	-	Abel Constructio
Abel Construction Construction Construction Construction	(210) 220-2200	ТХ		
Adell Plastics, Balti, N Accuracy and Accuracy and Acc	City	Role*		
<ul> <li>AFOLINO, AFOLINO C</li> <li>Aleris Recycling Inc,</li> </ul>	San Antonio	Sampler		
Ameresco, AMERESC	Language*			
American Paving Cor American Tennis Cou	English			
🖻 🌀 Users				
-				
		Save User Cancel		
		<b>^</b>		

A screen will open up where you can make further adjustments if needed. Click **Save User** to save the customer in their new location



Users can also be moved on the left side of your screen by expanding the users folder. From there select on the user you'd like to move, **hold** your mouse down to drag and drop the user to the new location. **Release** your mouse when you see the new location highlighted in blue with a small green arrow and the username with a green checkmark

	****	First Name*		Nex Sourch
omer Hierarchy	aname			
]01	Insmith5	3000		
Smith ( johnsmith5@email. Las	t Name*	Job Title		
Sm	ith			
Acme Lubricants, Top Mas	ail*	Confirm Email		
) 🕼 Users	insmith5@email.com		Dela	Company
Aber Construction Ct     J			коге	company
🔏 John Smith Pho	ne	State		Abel Construction
Adeock'S Systems, Ll	10) 220-2200	ТХ		
Adell Plastics, Balti, A	,	Role*		
Aleris Recycling Inc,	n Antonio	Sampler	-	
Ameresco, AMERESC	ansae <sub>*</sub>			
American Paving Cor	alish	<b>•</b>		
American Tennis Cou	gion			
V VO USEIS				
		Save User	Cancel	

A screen will open up where you can make any further adjustments if needed. Click **Save User** to save the customer in their new location

Castrol				Selec	t Language 📃 English+
NEXTGENERATION				Frank Gilboy 🗸	Last login on 12/23/201
HOME SAMPLES EQUIPMENT LABELS I	REPORTS SETTINGS AD	MIN		Qu	uick Search
L Customer Hierarchy	Details				
John Smith ( johnsmith5@email.com )	Users Roles	Customer Set	tings		
<ul> <li>Acme Lubricants, Top Master</li> <li>Acme Lubricants Inc, JONESTOWN F</li> <li>Users</li> </ul>	Add Modify	Delete	Reset Password		
Abel Construction Co. Ind, MOUN	Username	Full Name	Email	Online Role	Company
<ul> <li>Abel Construction Company Inc,</li> <li>Adcock'S Systems, Llc, ADOCK'S</li> <li>Adell Plastics, Balti, MD</li> <li>AFOLINO, AFOLINO OAKMONT, PA</li> <li>Aleris Recycling Inc, Friendly, W\</li> <li>Ameresco, AMERESCO GOSHEN N</li> <li>American Contractors Equipment</li> <li>American Paving Corp., SHOP</li> <li>American Tennis Courts, Inc</li> <li>Users</li> <li>John Smith</li> </ul>	johnsmith5	John Smith	johnsmith5@em	Sampler	American Tennis
	Once work	e moved the site they we	e user will displ ere moved to	ay under th	e new folder or

### **Modifying Worksites**



To modify a worksite select on the *Master* folder on the left. On the right click on the *Accounts* tab. Select the worksite you want to update by clicking on the *Company Name* (row will highlight in gray when you do this) and then click the *Modify* button

## **Modifying Worksites**



the Save button

## **Equipment Restrictions**



For more detailed instructions please view Equipment quick start guide



#### LABCHECK SUPPORT DESK:

Phone: **1.866.522.2432** 

Email: LabcheckSupport@AnalystsInc.com

## www. LabcheckResources.com