



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

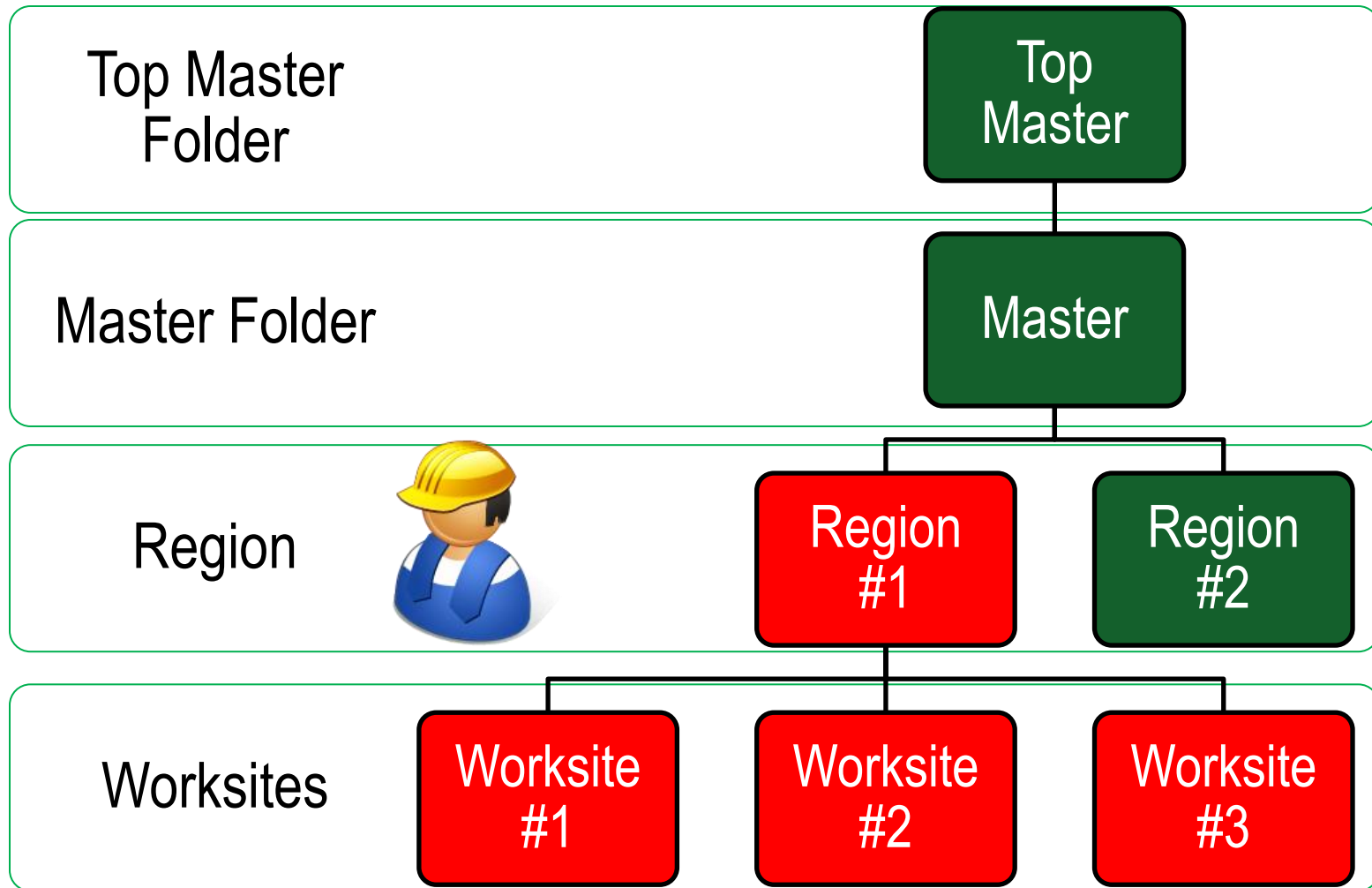
- Determines worksites and equipment viewed by user

Roles (Permission Levels)

- Determines what features a user has access to

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 view Equipment / Print Labels

Creating a Custom Role

Customer Hierarchy

Search for Users, Company, Site...

- Acme Lubricants, Top Master
 - Acme Lubricants Inc, JONESTOWN F
 - Users
 - Abel Construction Co. Ind, MOU
 - Abel Construction Company Inc,
 - Adcock'S Systems, Llc, ADOCK'S
 - Adell Plastics, Balti, MD
 - AFOLINO, AFOLINO OAKMONT, PA
 - Aleris Recycling Inc, Friendly, W
 - Ameresco, AMERESCO GOSHEN N
 - American Contractors Equipment
 - American Paving Corp., SHOP
 - American Tennis Courts, Inc

Details

Users

Roles

Customer Settings

Accounts

Add

Modify

Delete

Role Name	Manage Users	Manage Units	Register Sampl...	Manage Reports
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manager	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sampler	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sampler+Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

- Acme Lubricants, Top Mas
- Acme Lubricants Inc, JO
- Users
- Abel Construction Co
- Abel Construction Co
- Adcock'S Systems, LI
- Adell Plastics, Balti, M
- AFOLINO, AFOLINO C
- Aleris Recycling Inc,
- Ameresco, AMERESCO
- American Contractors
- American Paving Cor
- American Tennis Courts, Inc



Add Role



Name*

Demo Role

- ☐ Manage Users
- ☒ Manage Units
- ☐ Manage Reports
- ☒ Register Samples

Save

Cancel

A new window will open where you **must** assign a name to your new role and select the check boxes next to the features this role will have access to. Once complete click on the **Save** button.

Modifying/Deleting a Role



Select Language English

Frank Gilboy Last login on 12/23/2014

HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS ADMIN

Quick Search



Customer Hierarchy

Search for Users, Company, Site...

- Acme Lubricants, Top Master
 - Acme Lubricants Inc, JONESTOWN F
 - Users
 - Abel Construction Co. Ind, MOUN
 - Abel Construction Company Inc,
 - Adcock'S Systems, Llc, ADOCK'S
 - Adell Plastics, Balti, MD
 - AFOLINO, AFOLINO OAKMONT, PA
 - Aleris Recycling Inc, Friendly, WV
 - Ameresco, AMERESCO GOSHEN IN
 - American Contractors Equipment
 - American Paving Corp., SHOP
 - American Tennis Courts, Inc

Details

Users

Roles

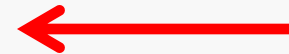
Customer Settings

Accounts

Add

Modify

Delete



Role Name	Manage Users	Manage Units	Register Sampl...	Manage Reports
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manager	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sampler	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sampler+Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Demo Role	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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



Select Language English

Frank Gilboy ▾ Last login on 12/23/2014

HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS ADMIN

Quick Search



Customer Hierarchy

John Smith



John Smith (john.smith@email.com)

John Smith (johnsmith5@email.com)

Users

- ▶ Abel Construction Co. Ind, MOUN
- ▶ Abel Construction Company Inc,
- ▶ Adcock'S Systems, Llc, ADOCK'S
- ▶ Adell Plastics, Balti, MD
- ▶ AFOLINO, AFOLINO OAKMONT, PA
- ▶ Aleris Recycling Inc, Friendly, WV
- ▶ Ameresco, AMERESCO GOSHEN N
- ▶ American Contractors Equipment
- ▶ American Paving Corp., SHOP
- ▶ American Tennis Courts, Inc

Details

Users

Roles

Customer Settings

Accounts

Add

Modify

Delete

Role Name	Manage Users	Manage Units	Register Sampl...	Manage Reports
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manager	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sampler	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sampler+Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Demo Role	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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. You can also 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 Language English

Frank Gilboy Last login on 12/23/2014

HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS ADMIN

Quick Search



Customer Hierarchy

John Smith (johnsmith5@email.com)

- Acme Lubricants, Top Master
 - Acme Lubricants Inc, JONESTOWN F
 - Users
 - Abel Construction Co. Ind, MOUN
 - Users
 - John Smith
 - Abel Construction Company Inc,
 - Adcock'S Systems, Llc, ADOCK'S
 - Adell Plastics, Balti, MD
 - AFOLINO, AFOLINO OAKMONT, PA
 - Aleris Recycling Inc, Friendly, WV
 - Ameresco, AMERESCO GOSHEN N
 - American Contractors Equipment
 - American Paving Corp., SHOP
 - American Tennis Courts, Inc

Details

Users

Roles

Add

Modify

Delete

Reset Password

Username	Full Name	Email	Online Role	Company
johnsmith5	John Smith	johnsmith5@em...	Sampler	Abel Constructio...

Clicking on a user will automatically open up the hierarchy to where they are set up. Clicking on the worksite will bring you to the worksite folder.

Moving Users



Select Language English

Frank Gilboy Last login on 12/23/2014

HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS ADMIN

Quick Search



Customer Hierarchy

John Smith (johnsmith5@email.com)

- Acme Lubricants, Top Master
 - Acme Lubricants Inc, JONESTOWN F
 - Users
 - Abel Construction Co. Ind, MOUN
 - Users
 - John Smith
 - Abel Construction Company Inc,
 - Adcock'S Systems, Llc, ADOCK'S
 - Adell Plastics, Balti, MD
 - AFOLINO, AFOLINO OAKMONT, PA
 - Aleris Recycling Inc, Friendly, WV
 - Ameresco, AMERESCO GOSHEN IN
 - American Contractors Equipment
 - American Paving Corp., SHOP
 - American Tennis Courts, Inc
- ✓ johnsmith5

Details

Users

Roles

Add

Modify

Delete

Reset Password

Username	Full Name	Email	Online Role	Company
johnsmith5	John Smith	johnsmith5@em...	Sampler	Abel Constructio...

You can move a user to a new location (or give access to multiple by moving to the master folder) in two different ways. First select on the **worksites** 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

Moving Users



HOME SAMPLES E

Customer Hierarchy

John Smith (johnsmith5@email.com)

- Acme Lubricants, Top Mas
- Acme Lubricants Inc, JO
- Users
- Abel Construction Co
- Users
 - John Smith
- Abel Construction Co
- Adcock'S Systems, LI
- Adell Plastics, Balti, M
- AFOLINO, AFOLINO C
- Aleris Recycling Inc,
- Ameresco, AMERESCO
- American Contractors
- American Paving Cor
- American Tennis Cou
- Users

Select Language English

Silboy Last login on 12/23/2014

Quick Search



Save User



Username*

johnsmith5

First Name*

John

Last Name*

Smith

Job Title

Email*

johnsmith5@email.com

Confirm Email

Phone

(210) 220-2200

State

TX

City

San Antonio

Role*

Sampler

Language*

English



Save User

Cancel




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

Moving Users



Customer Hierarchy

John Smith (johnsmith5@email.com)

- Acme Lubricants, Top Master
 - Acme Lubricants Inc, JONESTOWN F
 - Users
 - Abel Construction Co. Ind, MOUN
 - Users
 -  John Smith
- Abel Construction Company Inc,
- Adcock'S Systems, Llc, ADOCK'S
- Adell Plastics, Balti, MD
- AFOLINO, AFOLINO OAKMONT, PA
- Aleris Recycling Inc, Friendly, WA
- Ameresco, AMERESCO GOSHEN N
- American Contractors Equipment
- American Paving Corp., SHOP
-  American Tennis Courts, Inc
 -  User John Smith

Details

Users

Roles

Add

Modify

Delete

Reset Password

Username	Full Name	Email	Online Role	Company
johnsmith5	John Smith	johnsmith5@em...	Sampler	Abel Constructio...

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

Save User



HOME SAMPLES E

Customer Hierarchy

John Smith (johnsmith5@email.com)

- Acme Lubricants, Top Mas
- Acme Lubricants Inc, JO
- Users
- Abel Construction Co
- Users
- John Smith
- Abel Construction Co
- Adcock'S Systems, LI
- Adell Plastics, Balti, M
- AFOLINO, AFOLINO C
- Aleris Recycling Inc,
- Ameresco, AMERESCO
- American Contractor
- American Paving Cor
- American Tennis Cou
- Users

Select Language English

Silboy Last login on 12/23/2014

Quick Search



Save User



Username*

johnsmith5

First Name*

John

Last Name*

Smith

Job Title

Email*

johnsmith5@email.com

Confirm Email

Phone

(210) 220-2200

State

TX

City

San Antonio

Role*

Sampler

Language*

English



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

Save User



Select Language English

Frank Gilboy Last login on 12/23/2014

HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS ADMIN

Quick Search



Customer Hierarchy

John Smith (johnsmith5@email.com)

- Acme Lubricants, Top Master
 - Acme Lubricants Inc, JONESTOWN F
 - Users
 - Abel Construction Co. Ind, MOUN
 - Users
 - Abel Construction Company Inc,
 - Adcock'S Systems, Llc, ADOCK'S
 - Adell Plastics, Balti, MD
 - AFOLINO, AFOLINO OAKMONT, PA
 - Aleris Recycling Inc, Friendly, WV
 - Ameresco, AMERESCO GOSHEN N
 - American Contractors Equipment
 - American Paving Corp., SHOP
 - American Tennis Courts, Inc
 - Users
 - John Smith

Details

Users

Roles

Customer Settings

Add

Modify

Delete

Reset Password

Username	Full Name	Email	Online Role	Company
johnsmith5	John Smith	johnsmith5@em...	Sampler	American Tennis ...

Once moved the user will display under the new folder or worksite they were moved to

Modifying Worksites



Select Language English

Frank Gilboy Last login on 12/23/2014

HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS ADMIN

Quick Search



Customer Hierarchy

John Smith (johnsmith5@email.com)

- Acme Lubricants, Top Master
 - Acme Lubricants Inc, JONESTOWN F
 - Users
 - Abel Construction Co. Ind, MOUN
 - Abel Construction Company Inc,
 - Adcock'S Systems, Llc, ADOCK'S
 - Adell Plastics, Balti, MD
 - AFOLINO, AFOLINO OAKMONT, PA
 - Aleris Recycling Inc, Friendly, WV
 - Ameresco, AMERESCO GOSHEN N
 - American Contractors Equipment
 - American Paving Corp., SHOP
 - American Tennis Courts, Inc

Details

Users

Roles

Customer Settings

Accounts

Modify

Company

Worksite

Abel Construction Co. Ind	MOUNTVILLE, PA
Abel Construction Company Inc	YORK PA
Adcock'S Systems, Llc	ADOCK'S SYSTEMS, LLC
Adell Plastics	Balti, MD
AFOLINO	AFOLINO OAKMONT, PA
Aleris Recycling Inc	Friendly, WV
Ameresco	AMERESCO GOSHEN NY
American Contractors Equipment Co.	Indianola, PA
American Paving Corp.	SHOP

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 screenshot shows the Castrol LABCHECK NEXT GENERATION web application. A 'Modify Account' dialog box is open, displaying the following information:

- Company*:** Abel Construction Co. Ind
- Worksite:** MOUNTVILLE, PA
- Address 1:** 123 Address Lane
- Address 2:** (empty field)
- City:** MOUNTVILLE
- State:** PA
- Zip Code:** 17554

At the bottom right of the dialog box, there are two buttons: **Save** (green) and **Cancel** (white). A red arrow points to the **Save** button.

A red callout box at the bottom right contains the text: "A new window will open up with the current worksite information. Make updates needed and then click on the **Save** button."

Equipment Restrictions



Select Language English

Frank Gilboy ▾ Last login on 12/23/2014

HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS ADMIN

Quick Search



Customer Hierarchy

John Smith (johnsmith5@email.com)

- Acme Lubricants, Top Master
 - Acme Lubricants Inc, JONESTOWN F
 - Users
 - Abel Construction Co. Ind, MOUM
 - Abel Construction Company Inc,
 - Adcock'S Systems, Llc, ADOCK'S
 - Adell Plastics, Balti, MD
 - AFOLINO, AFOLINO OAKMONT, PA
 - Aleris Recycling Inc, Friendly, WV
 - Ameresco, AMERESCO GOSHEN N
 - American Contractors Equipment
 - American Paving Corp., SHOP
 - American Tennis Courts, Inc

Details

Users

Roles

Customer Settings

Accounts

Equipment Restrictions

☒ Industrial & Mobile ☐ Industrial Only ☐ Mobile Only

The **Customer Settings** tab gives you the ability to apply equipment restrictions to a region or to individual worksites. **Industrial & Mobile** means users can industrial and mobile equipment to their location. **Industrial Only** means industrial equipment can be added and **Mobile Only** means mobile equipment can be added.
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