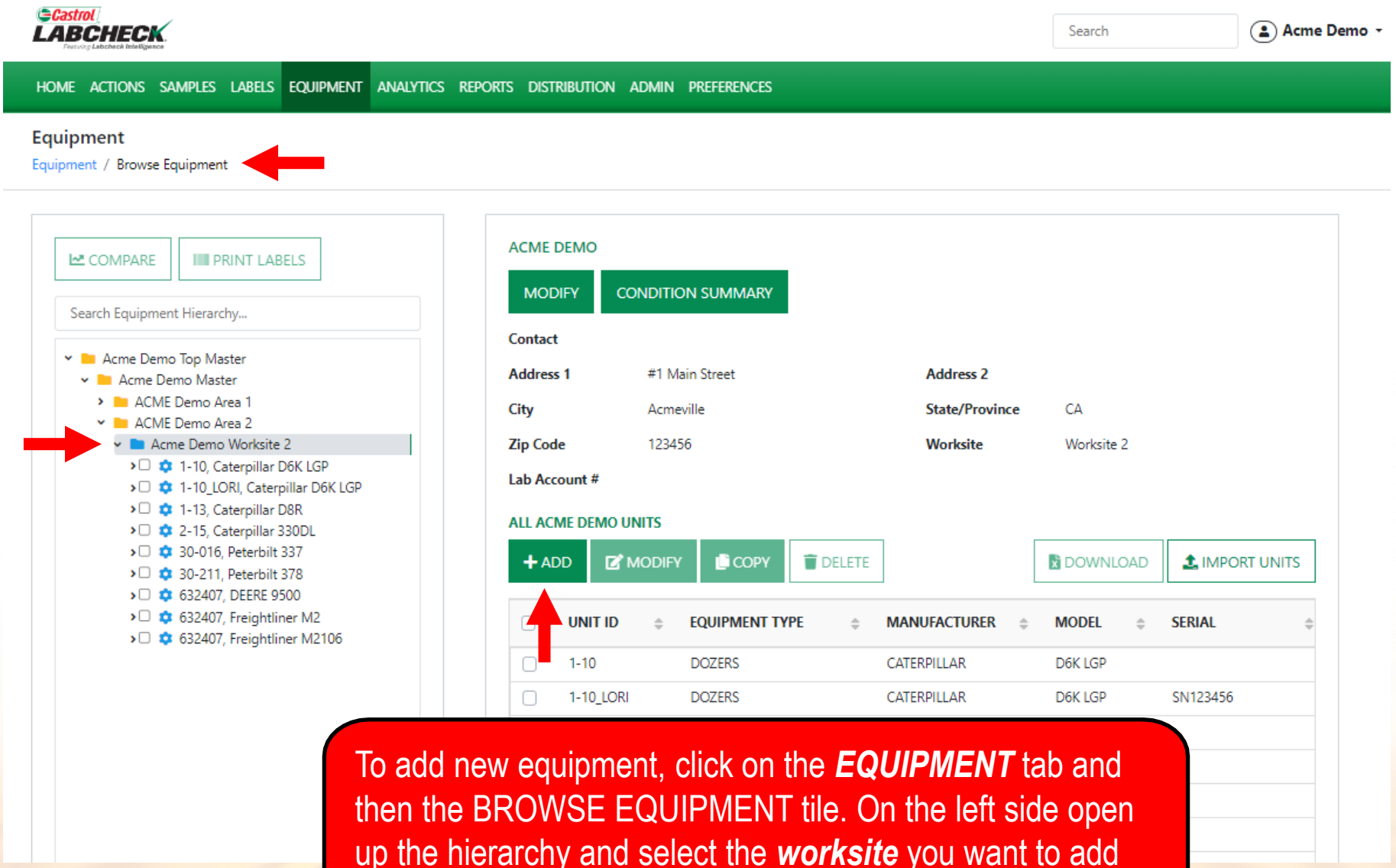
QUICK START GUIDE

ADDING INDUSTRIAL EQUIPMENT

Learn How To:

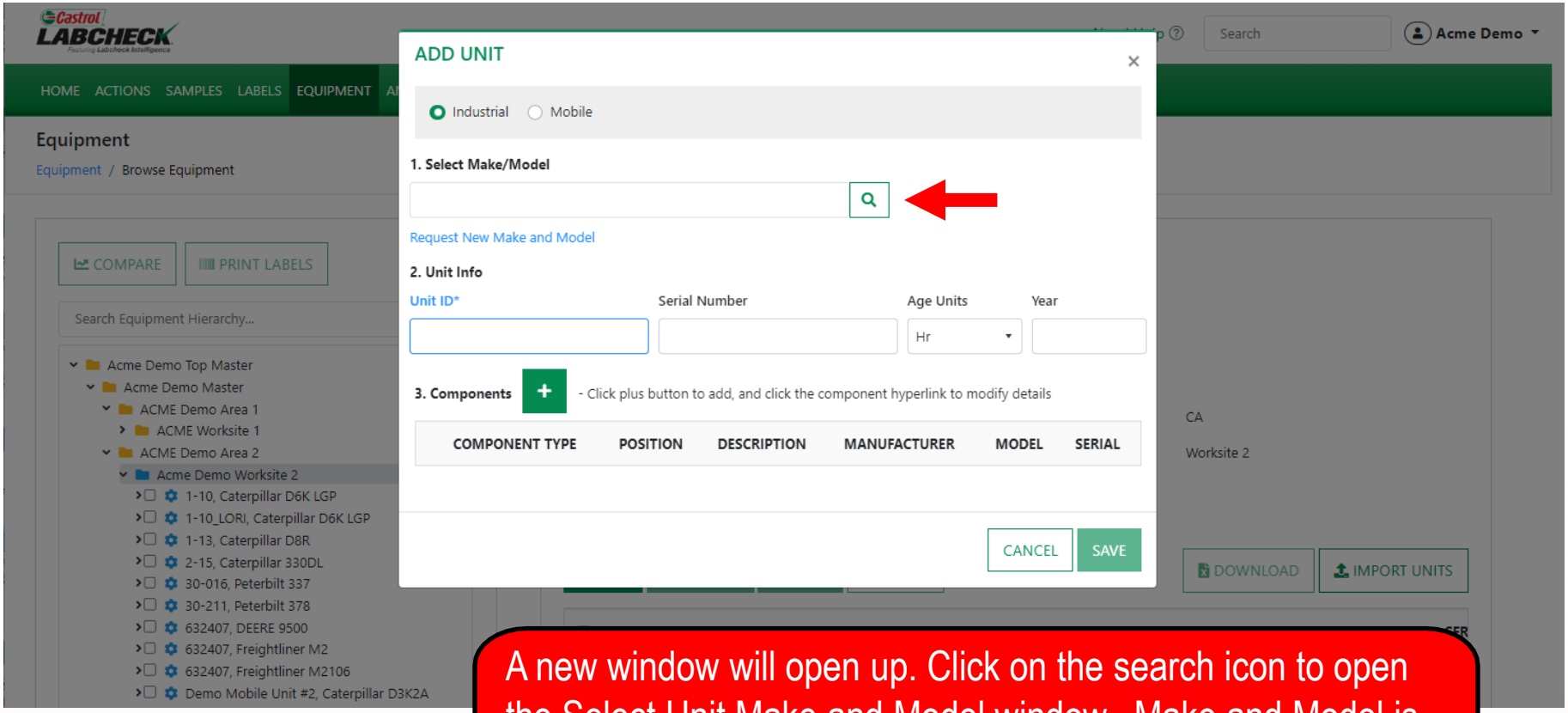
1. Add Equipment
2. Modify Equipment
3. Delete Equipment

ADDING NEW EQUIPMENT



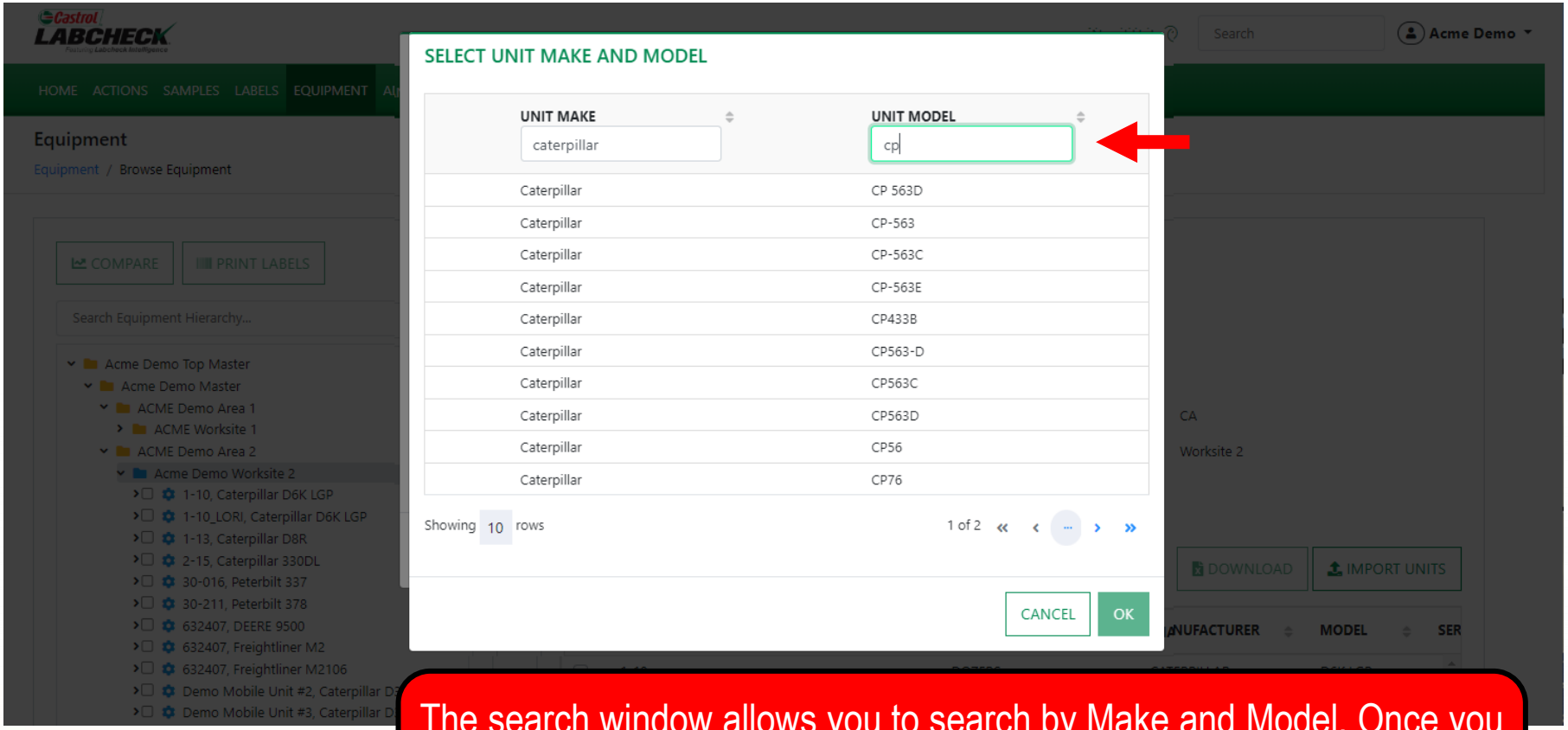
To add new equipment, click on the ***EQUIPMENT*** tab and then the BROWSE EQUIPMENT tile. On the left side open up the hierarchy and select the ***worksite*** you want to add equipment to. On the right, click the ***+ADD*** button.

ADDING NEW EQUIPMENT



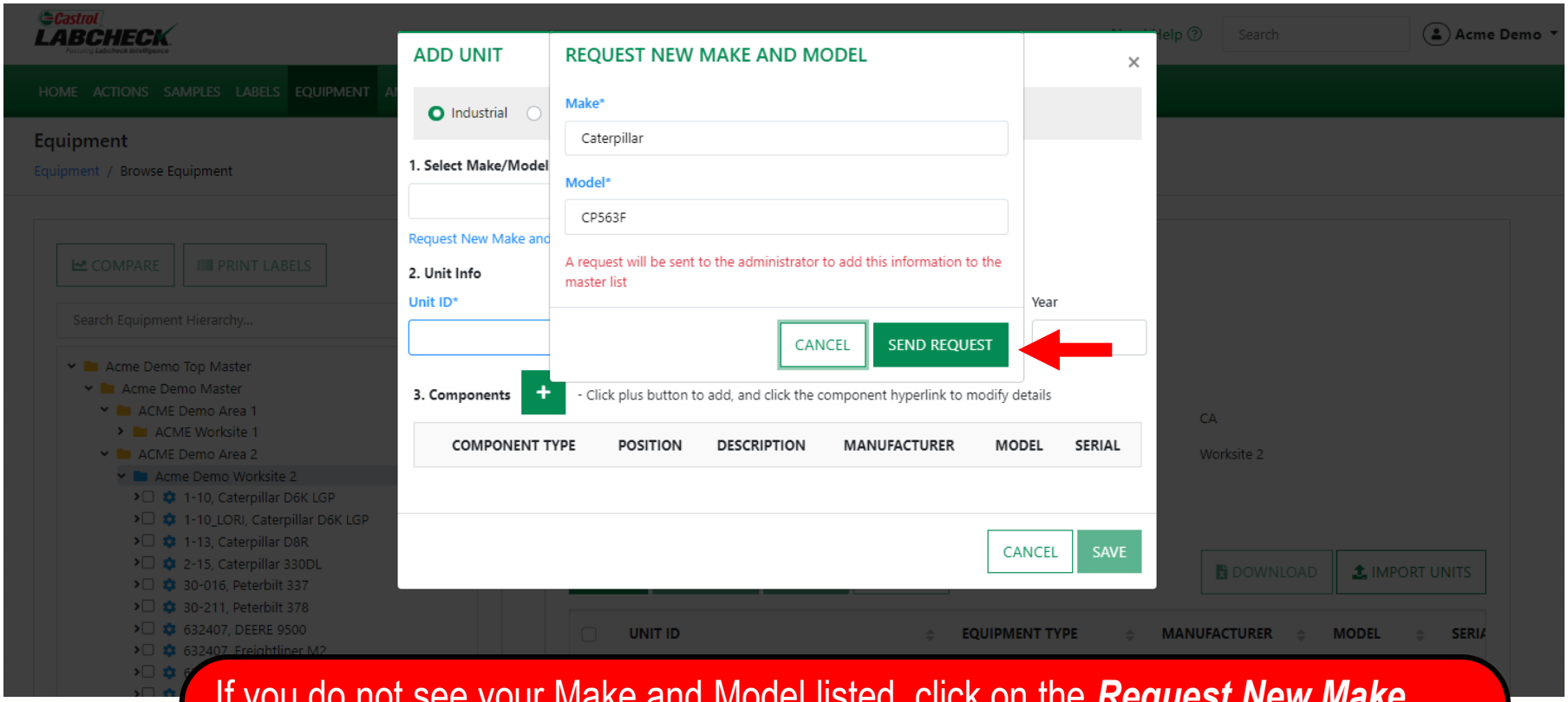
A new window will open up. Click on the search icon to open the Select Unit Make and Model window. Make and Model is not required; If you do not know the make and model, leave this field blank.

SELECT MAKE AND MODEL



The search window allows you to search by Make and Model. Once you have found the Make and Model you are looking for, click on the row and then click the ***OK*** button.

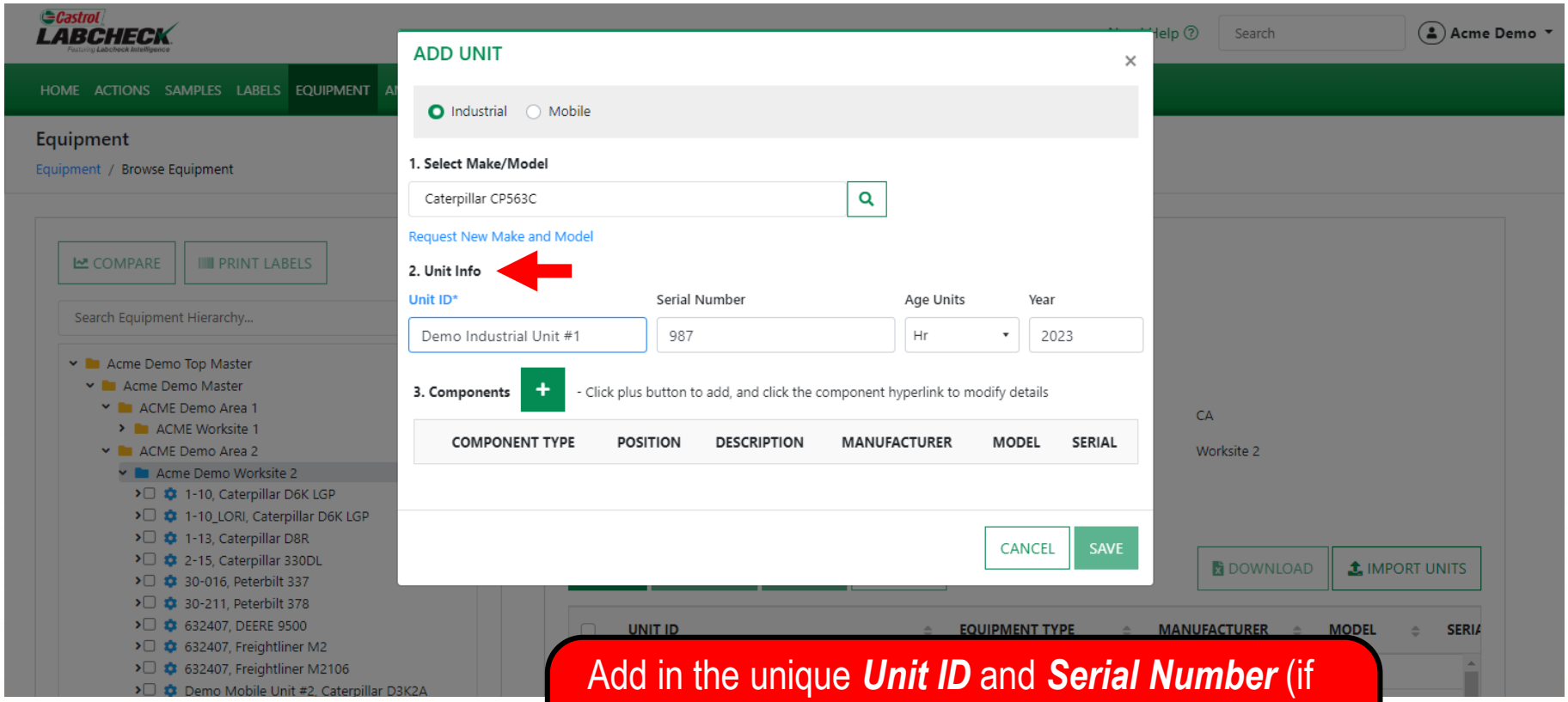
REQUEST A NEW MAKE & MODEL



If you do not see your Make and Model listed, click on the ***Request New Make and Model*** link.

Type in the new make & model and click the ***SEND REQUEST*** button. <u>This make & model will be available to use immediately</u>. An email will be sent to the Labcheck admin to add it to the database for all users to use in the future.

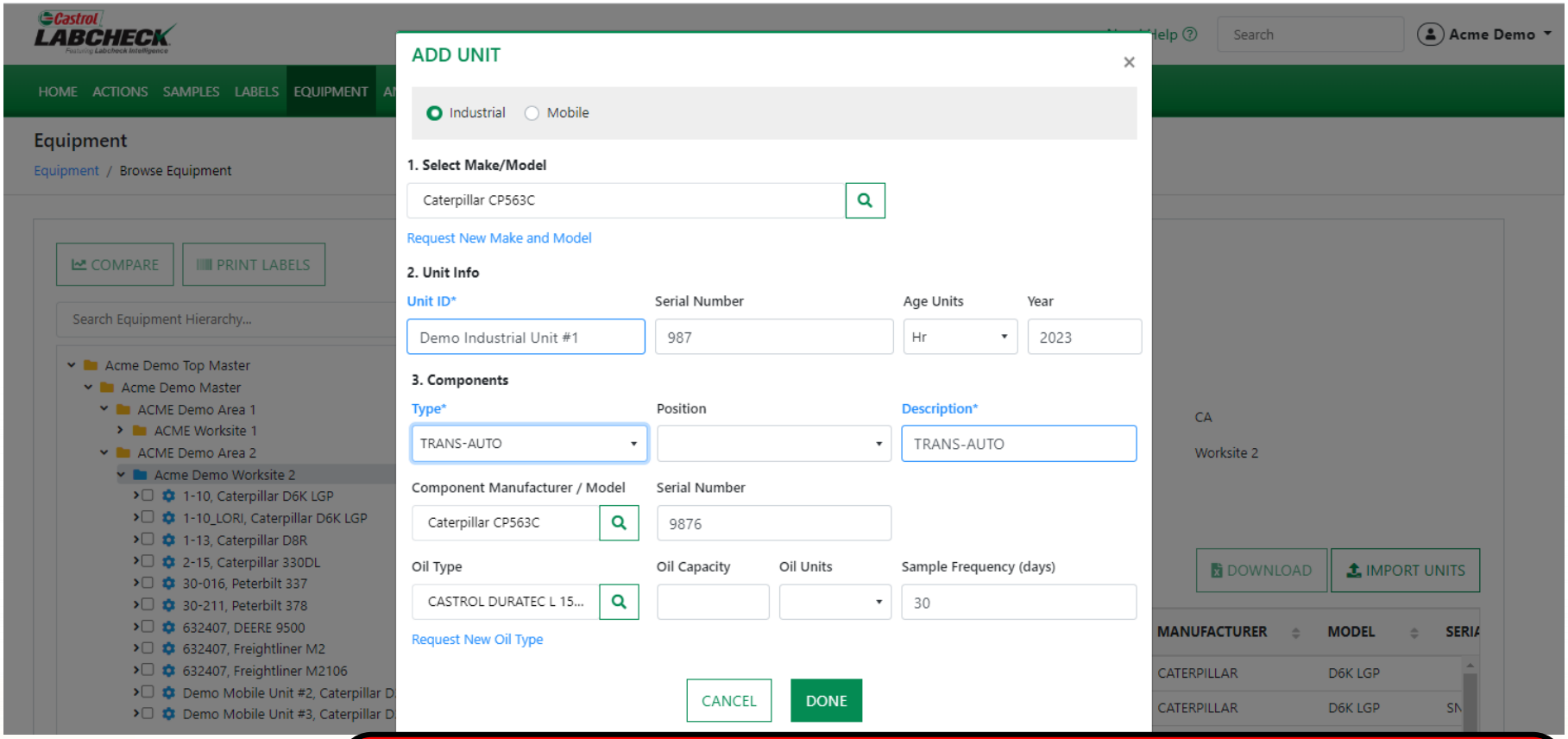
ENTER UNIT INFORMATION



Add in the unique ***Unit ID*** and ***Serial Number*** (if applicable).

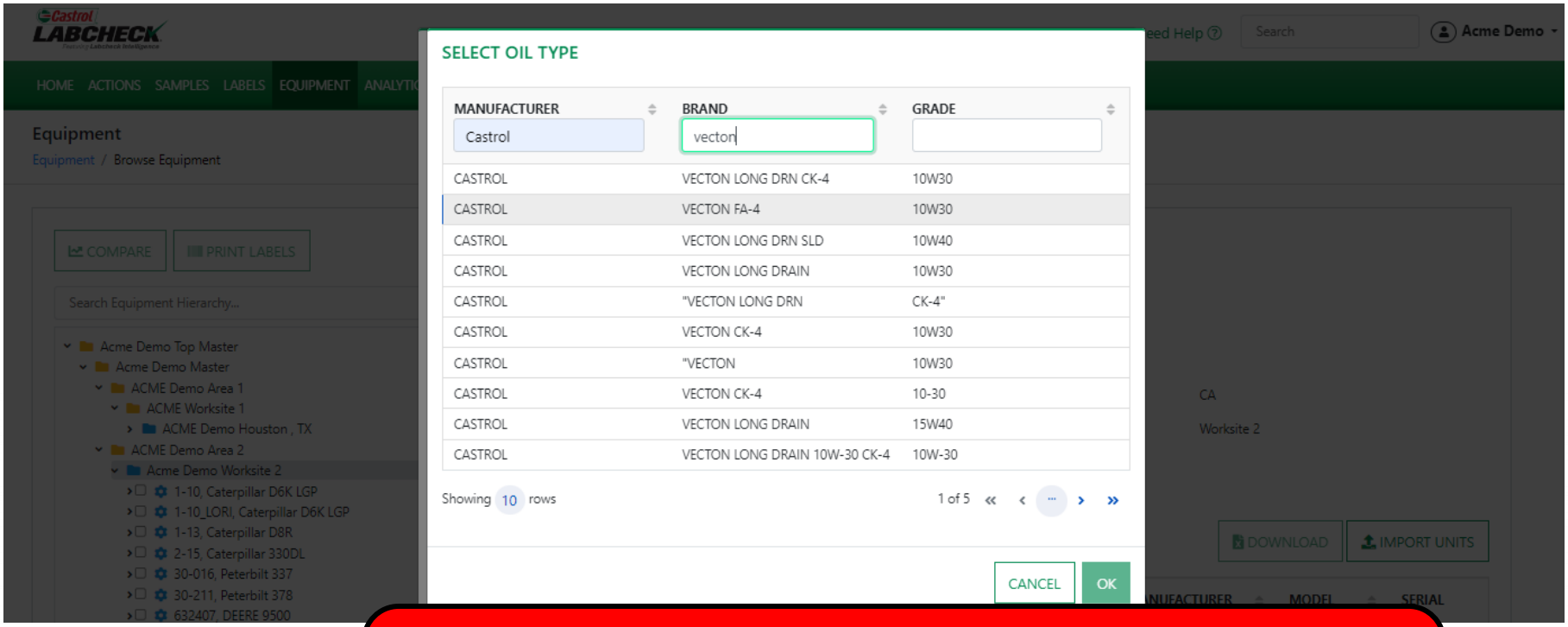
To add components, click on the **+** button next to Components.

ADDING COMPONENTS



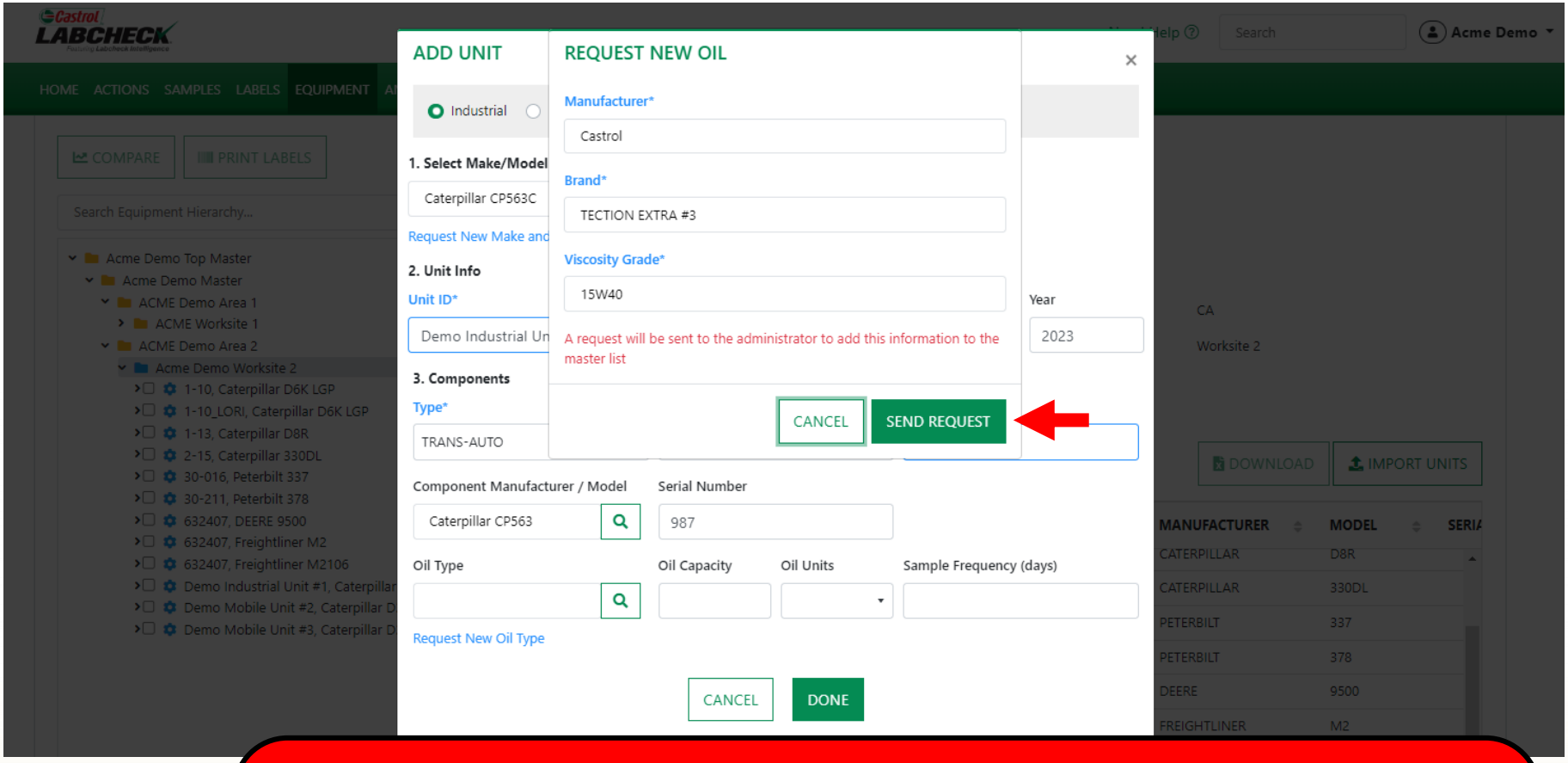
Click on the drop down box and select the ***Type.*** Once selected, the type will auto populate in the ***Description*** field. If applicable, fill in the remaining fields. Once complete, click the ***DONE*** button.

LOOKING UP OIL TYPES



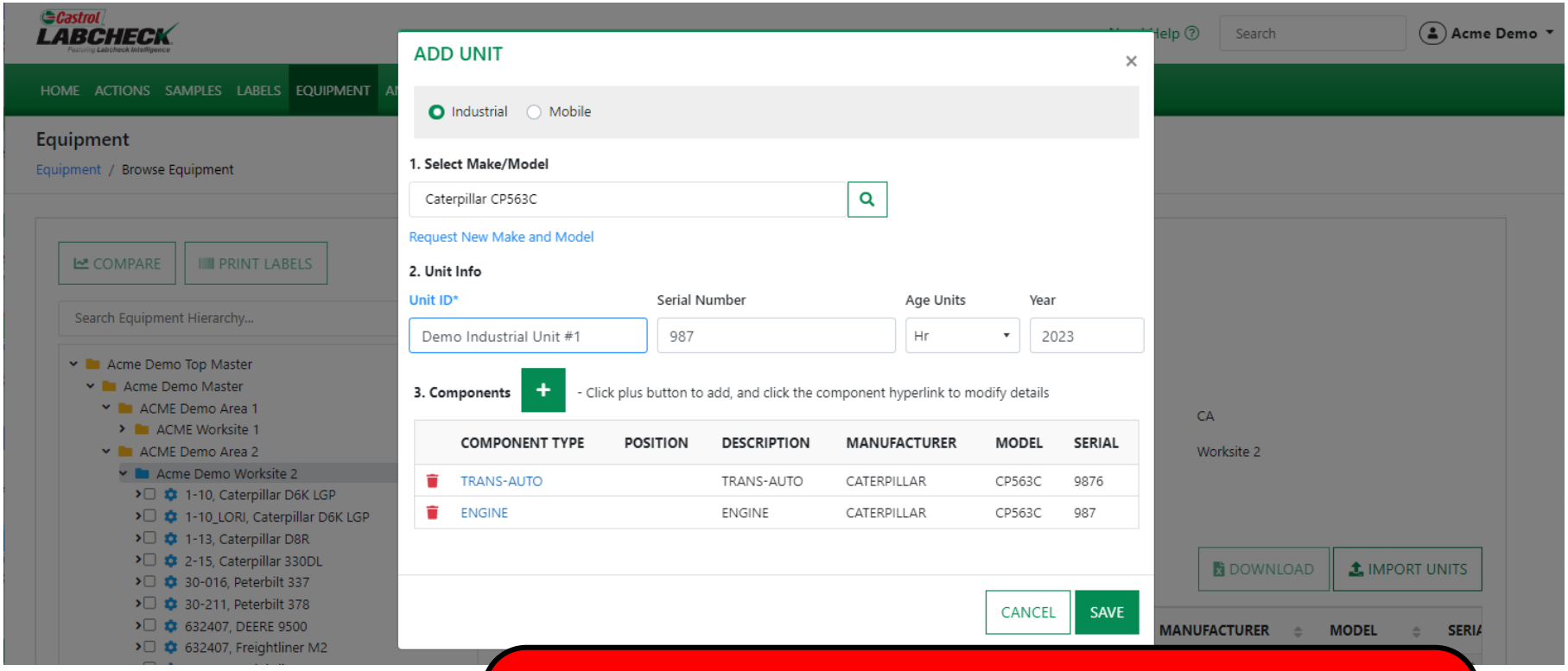
The ***Select Oil Type*** window allows you to search by Oil Manufacturer, Brand and Viscosity Grade. Once you have found the Oil Type you are looking for, select the row and click the ***OK*** button.

REQUEST A NEW OIL TYPE



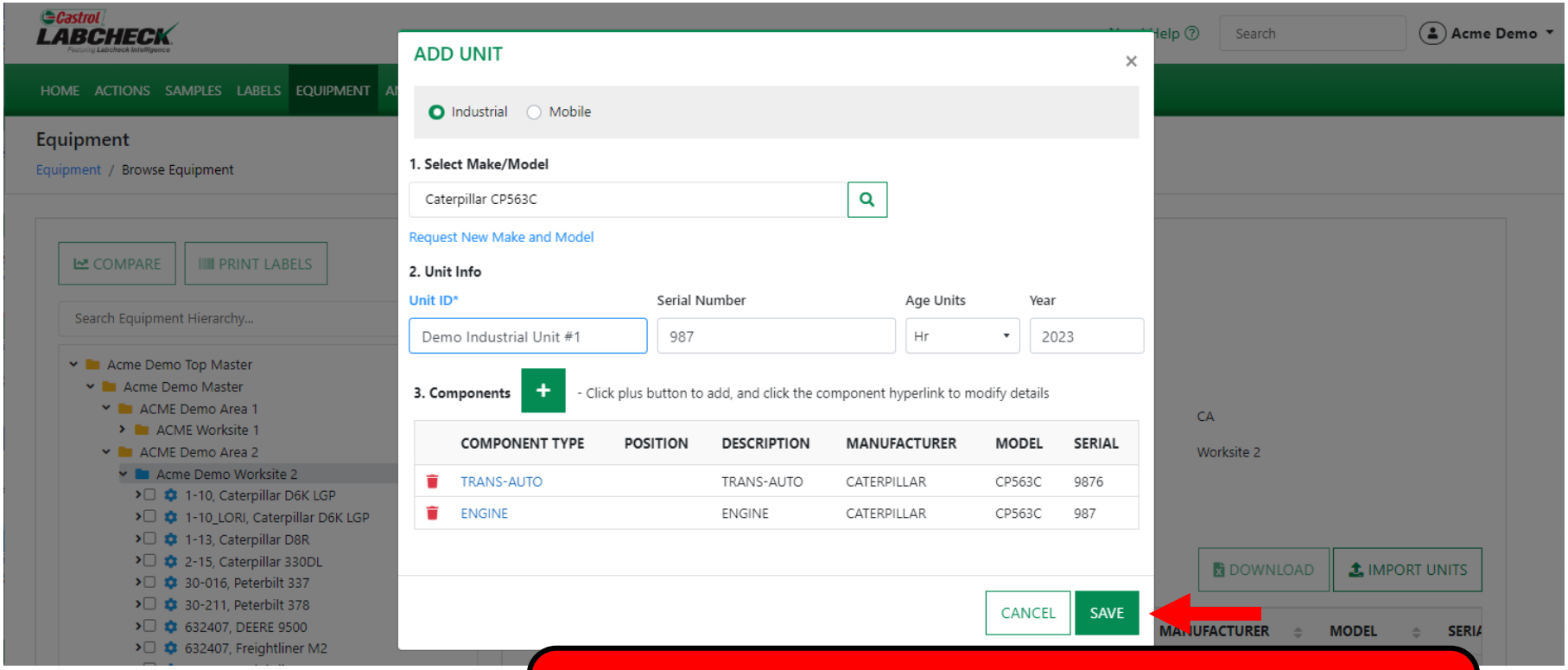
If you do not see your oil type listed, click on the ***Request New Oil Type*** link. To request a new oil type you must fill in all fields: Manufacturer, Brand and Viscosity Grade. Click the ***SEND REQUEST*** button. <u>This oil type will be available immediately</u>. An email will be sent to the Labcheck admin to add this oil type to the database for all users to use in the future.

MODIFY & DELETE COMPONENTS



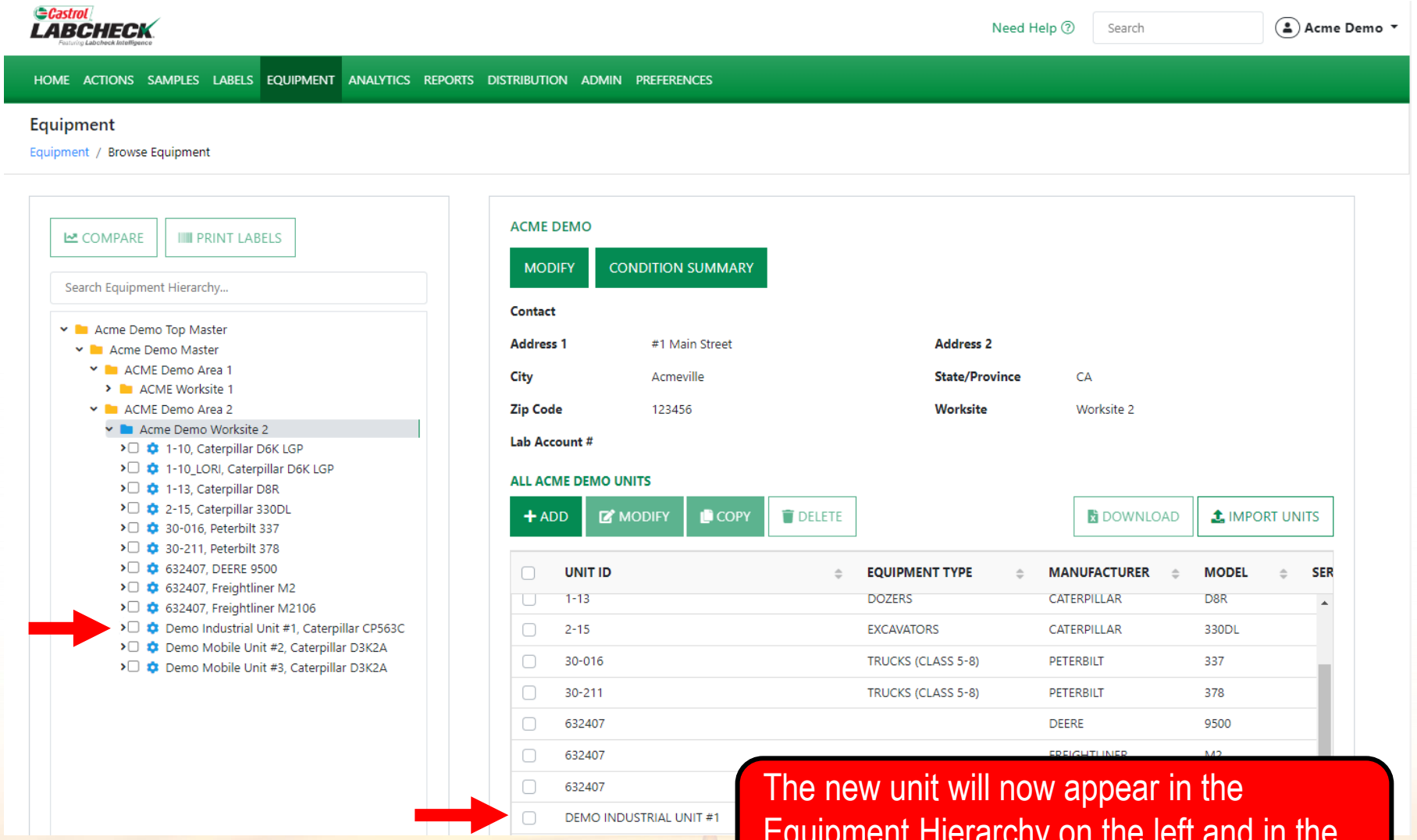
To ***Modify*** a component, click on the component hyperlink.
To ***Delete*** a component, click on the 🗑 icon. Please note that deleting components permanently removes information from the database and cannot be restored.

SAVE & CLOSE



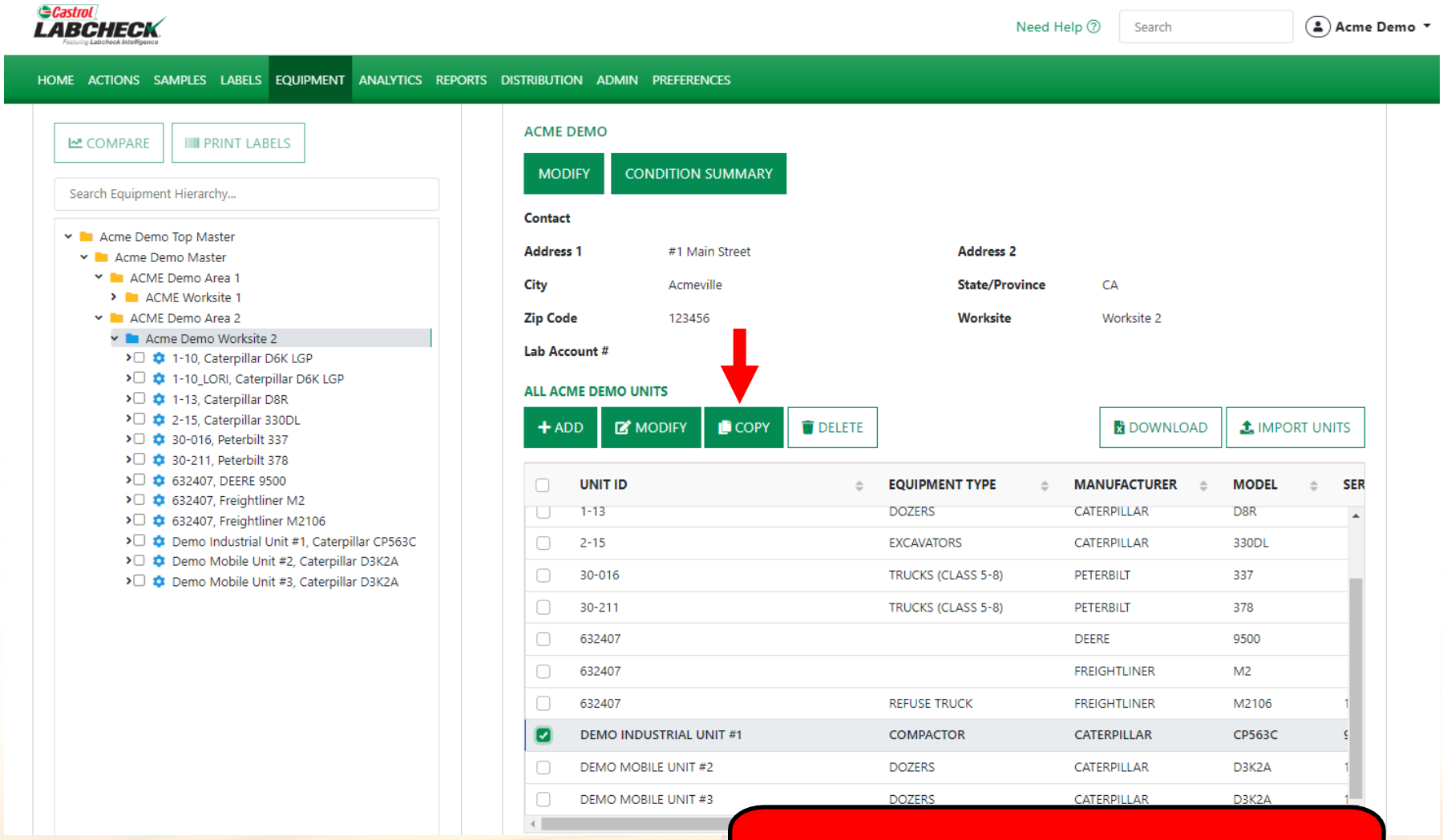
Continue to click the **+** button to add components. Once all components have been added, click the ***SAVE*** button.

SAVE & CLOSE



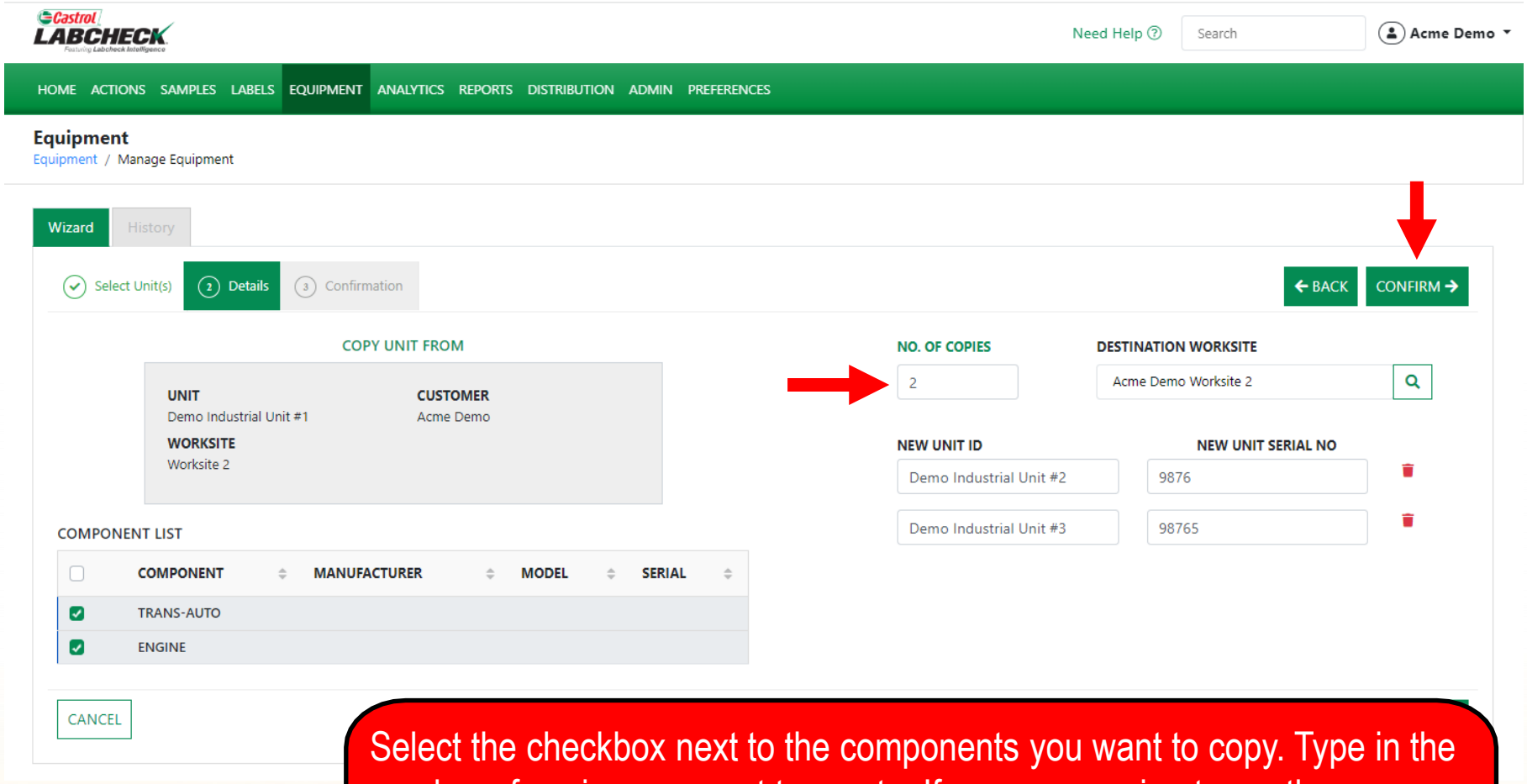
The new unit will now appear in the Equipment Hierarchy on the left and in the list of units on the right.

COPY UNITS



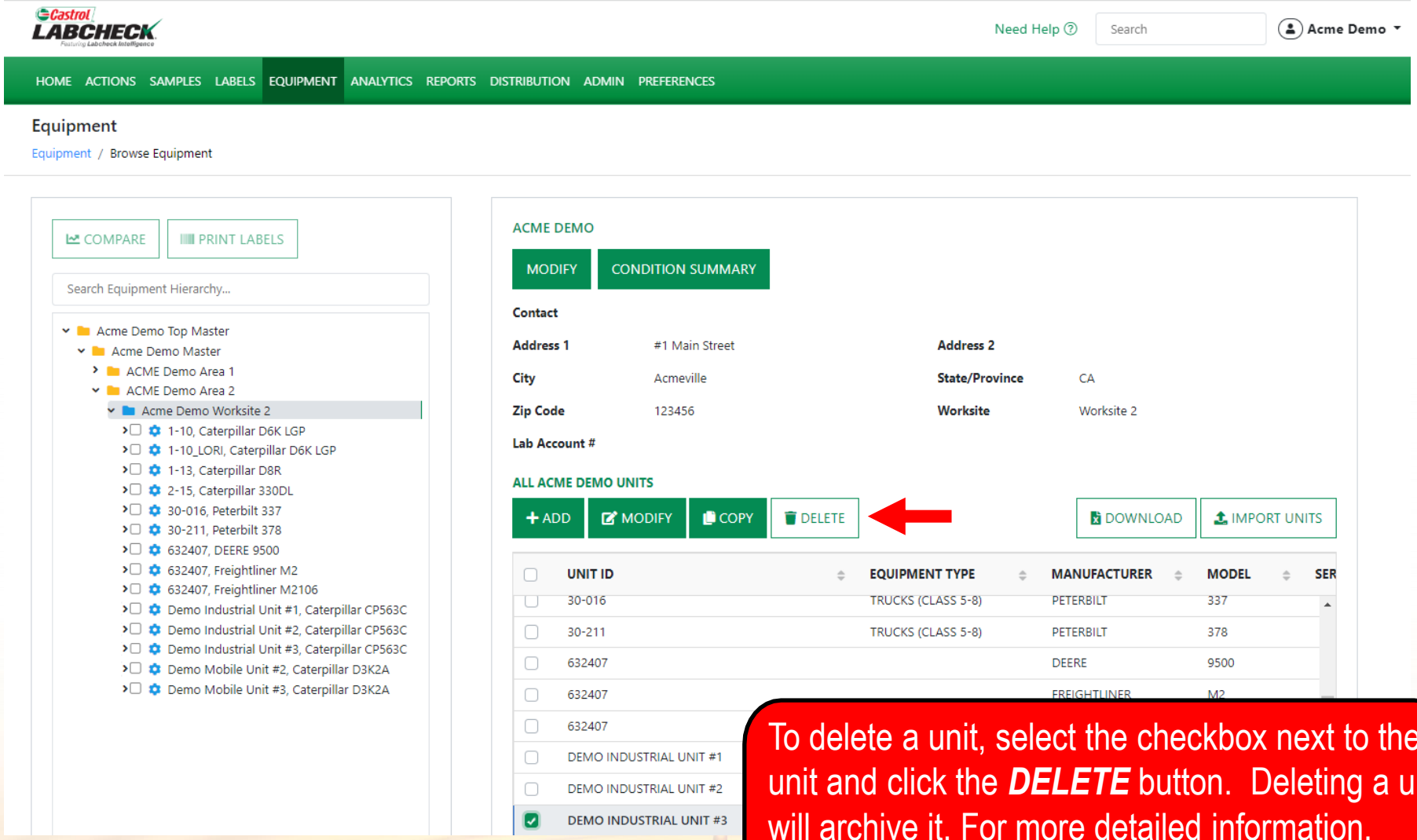
To copy a unit, select the checkbox next to the unit and click on the ***COPY*** button .

COPY UNITS



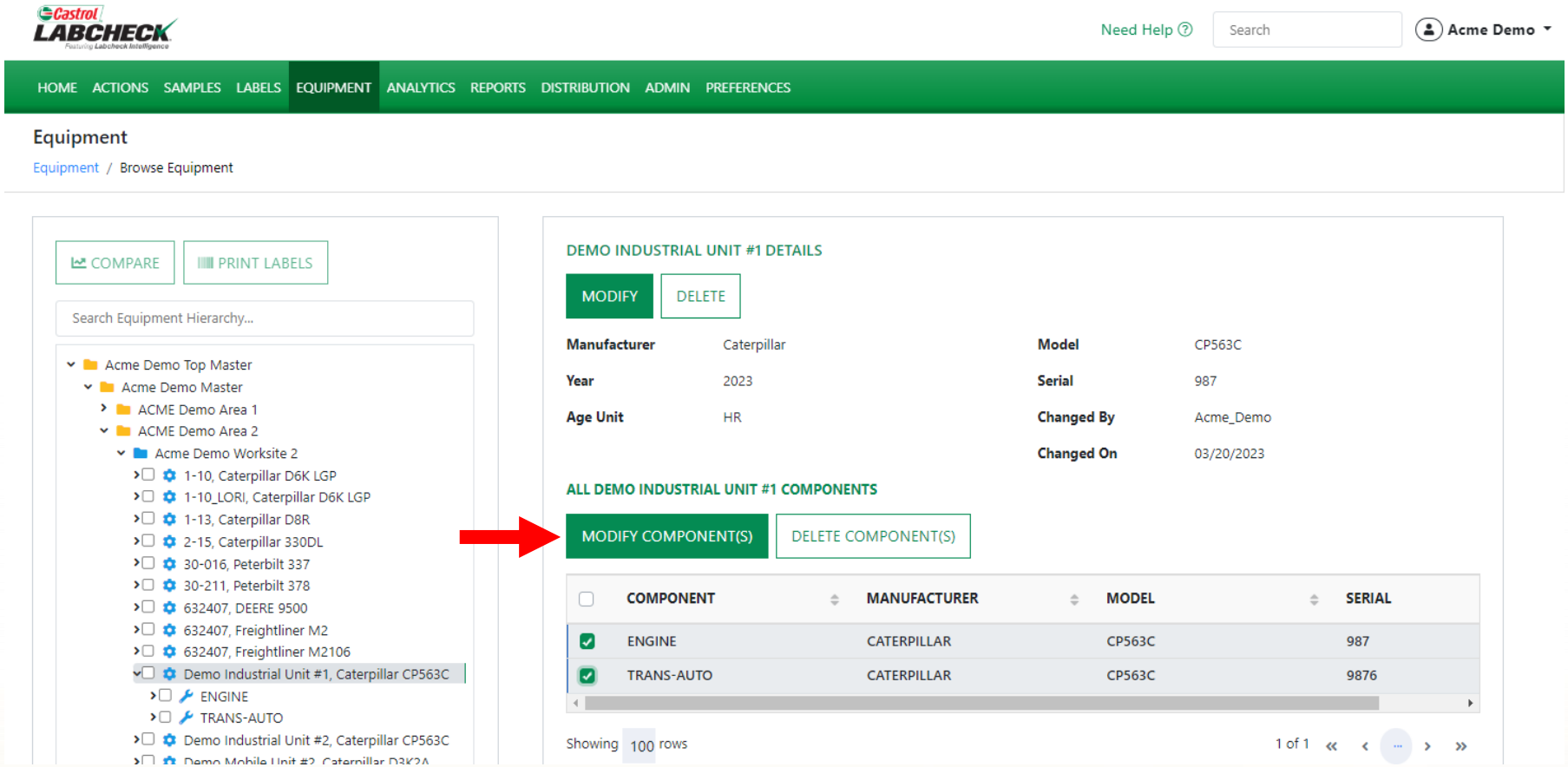
Select the checkbox next to the components you want to copy. Type in the number of copies you want to create. If you are copying to another worksite, use the search button to look it up. Type in the new unit id(s) and serial number(s). Once complete, click the ***CONFIRM*** button. For more detailed instructions, please see the **Manage Equipment** quick start guide.

DELETE UNITS



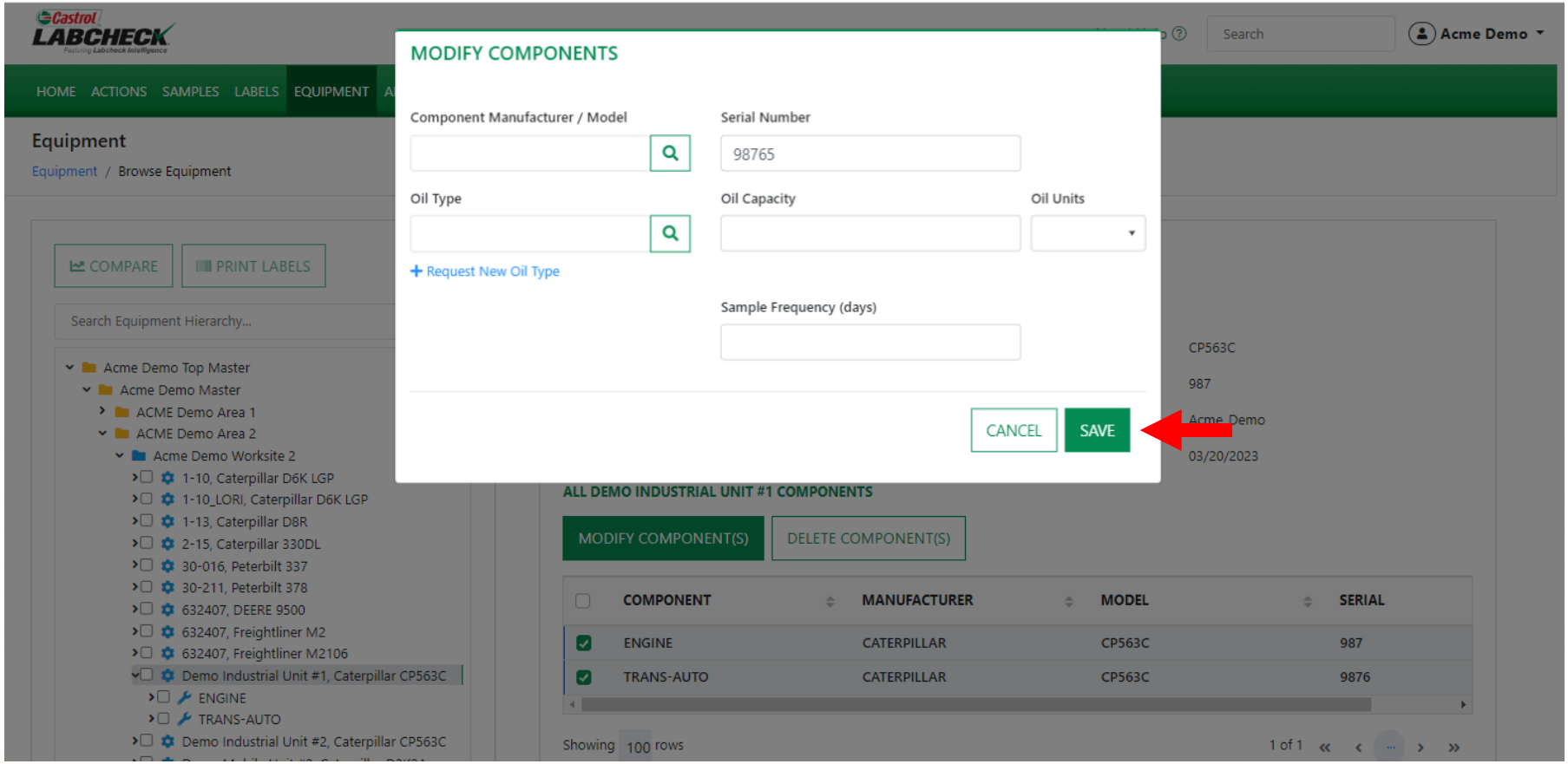
To delete a unit, select the checkbox next to the unit and click the ***DELETE*** button. Deleting a unit will archive it. For more detailed information, please see the **Manage Equipment** quick start guide.

MODIFYING COMPONENTS



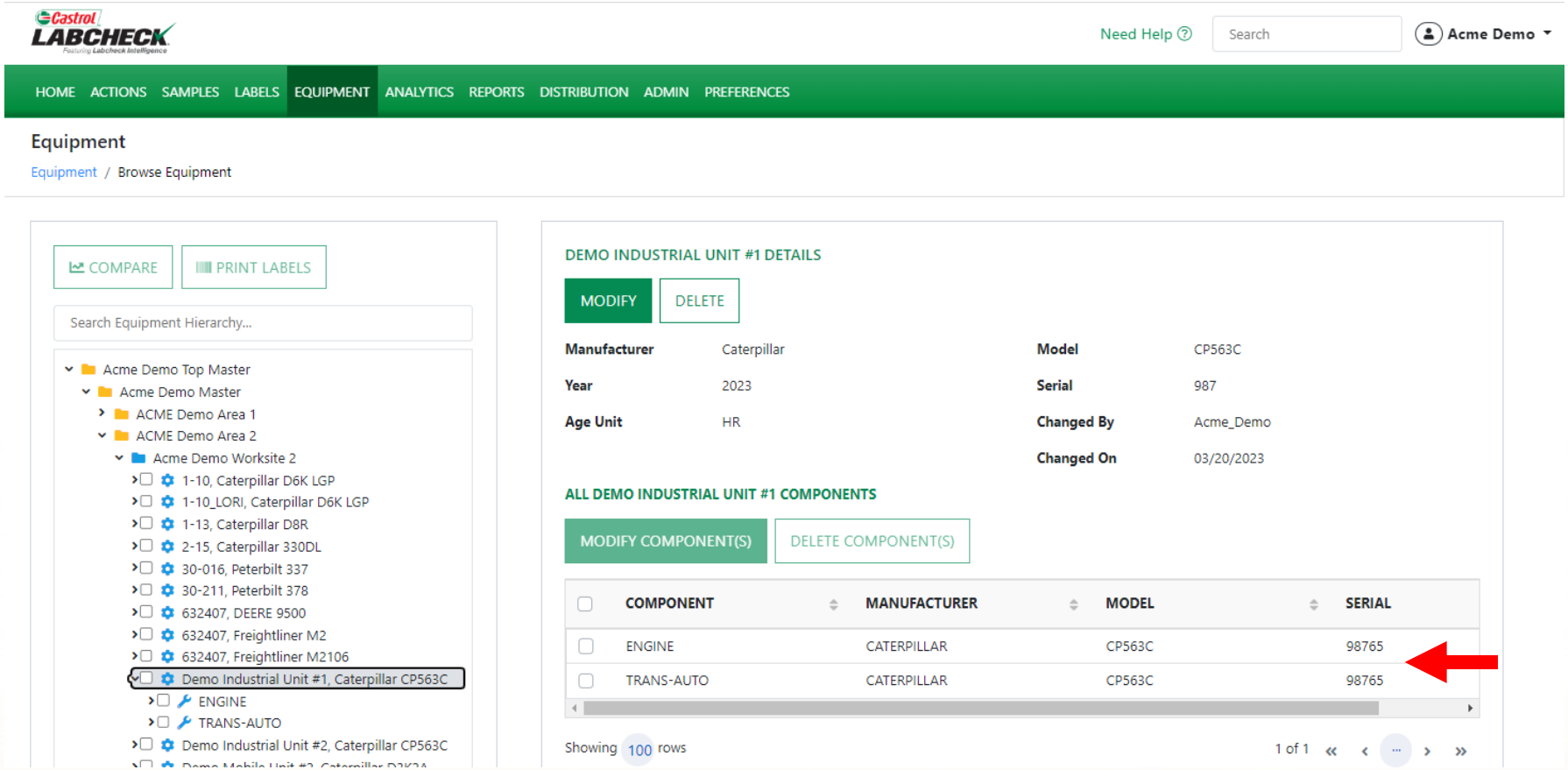
When selected at the ***Unit level*** on the left, you can modify component(s) by clicking the checkbox on the component(s) you want to modify on the right. Select the ***MODIFY COMPONENT(S)*** button to make revisions.

MODIFYING COMPONENTS



The MODIFY COMPONENTS window allows you to update multiple components at the same time. Once updates are entered, select the ***SAVE*** button.

MODIFYING COMPONENTS



Updates will display in the list of components on the right side.

Castrol LABCHECK
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