



QUICK START GUIDE

ADMINISTRATOR ADVANCED

Learn About:

1. Search for a user
2. Move a user / modify access
3. Modify account details

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.

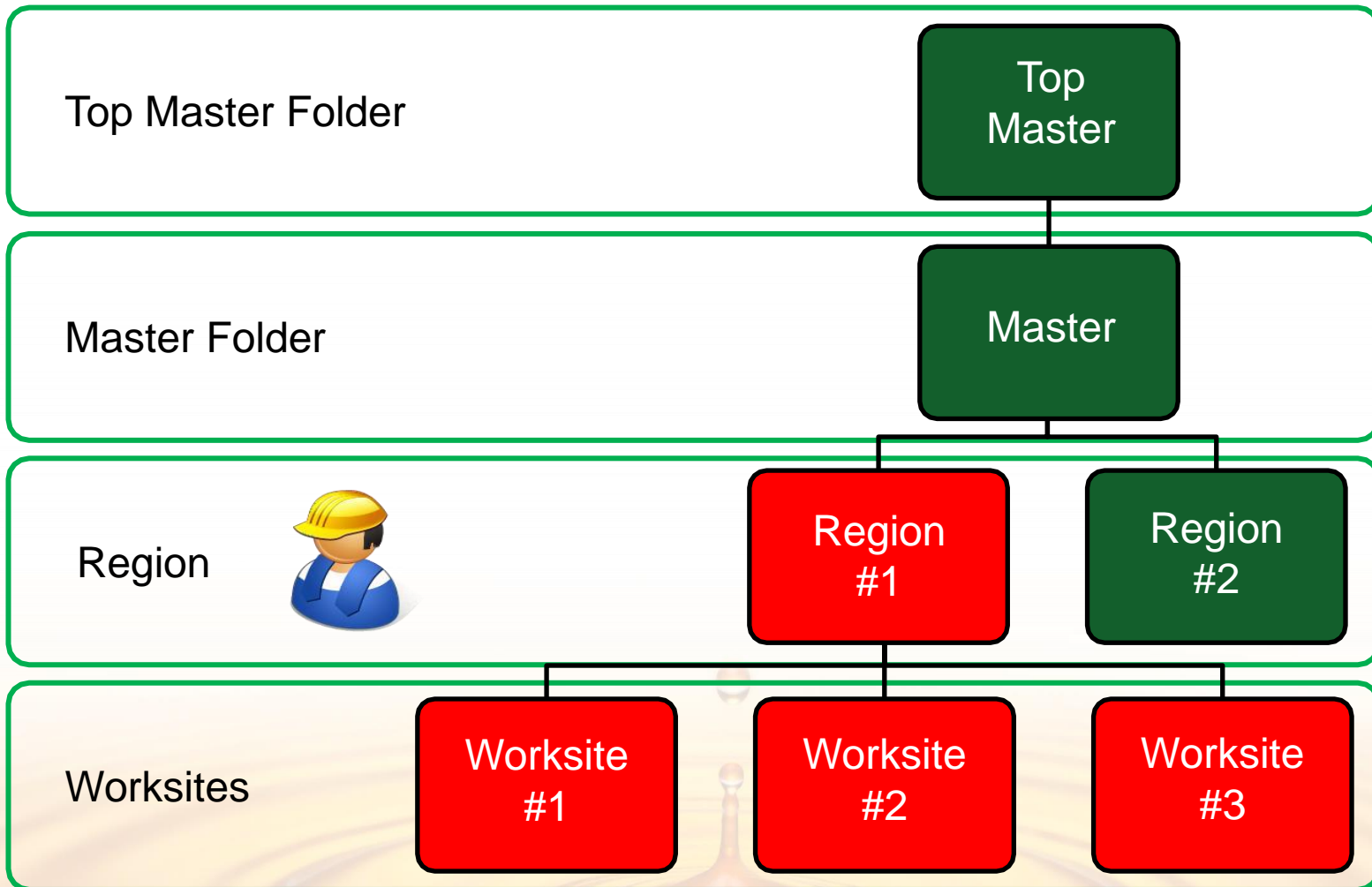
When setting up a new user, there are two things to consider – Data Access and Permissions.

Groups (Data Access)	Roles (Permissions)
Determines the worksites and equipment viewable by the user	Determines what features a user has access to



DATA ACCESS EXPLANATION

Below is an example of how Data Access works. 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.



Administrator

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



Manager

- Equipment management, Move/Add/Delete/Update units & component records
- Run Management Reports



Sampler + Reports

- Can only view Equipment, create new samples & print labels
- Run Management Reports



Sampler

- Can only view Equipment, create new samples & print labels

SEARCH FOR USERS

Admin

Manage users and related information



USERS

Add, edit and manage all users



GROUPS

View groups and associated users,
permissions and attributes

To find a user, click on the **ADMIN** tab
and select the **USERS** tile.

SEARCH FOR A USER

All Users

Admin / Users

+ NEW USER

+ Add Filter



Full Name	Email	User Name	User Status	Company	Role	Last Login
Acme Demo	lori.beerwart+acme@bureauveritas.com	Acme_Demo	Active	Bureau Veritas	Administrator	03/09/2023
John Smith	JSmith@email.com	JSmith@email.com	Active	Acme Demo	Sampler + Reports	
Melissa Wood	MWood@email.com	MWood@email.com	Active	Acme Demo	Manager	
Sarah Jones	SJones@email.com	SJones@email.com	Active	Acme Demo	Sampler	

All users you manage will be listed here. Use a filter or simply scroll through the list to find a user. Click on the user's name to open the User Details page.

SEARCH FOR A USER

All Users

Admin / Users

+ NEW USER

Search adhoc filters



	Email	User Name	User Status	Company	Role	Last Login
Full Name						
Email						
User Name						
User Status						
Company						
Role						
lori.beerwart+acme@bureauveritas.com	lori.beerwart+acme@bureauveritas.com	Acme_Demo	Active	Bureau Veritas	Administrator	03/09/2023
JSmith@email.com	JSmith@email.com	JSmith@email.com	Active	Acme Demo	Sampler + Reports	
Melissa Wood	MWood@email.com	MWood@email.com	Active	Acme Demo	Manager	
Sarah Jones	SJones@email.com	SJones@email.com	Active	Acme Demo	Sampler	

To add a filter, click on the **+Add Filter** button and select the property value from the list. You are able to search by any of the fields shown in the Users table above.



SEARCH FOR A USER

All Users

Admin / Users

+ NEW USER

+ Add Filter



Full Name ×

Contains ▾

equals

contains

starts with

APPLY

	User Name	User Status	Company	Role	Last Login
rwart+acme@bureauverita	Acme_Demo	Active	Bureau Veritas	Administrator	03/09/2023
@email.com	JSmith@email.com	Active	Acme Demo	Sampler + Reports	
Melissa Wood	MWood@email.com	Active	Acme Demo	Manager	
Sarah Jones	SJones@email.com	Active	Acme Demo	Sampler	

Select the operator from the drop down list. An Operator means how you want the filter search to display. In this example, 'contains' will only display results that contain the value input for the given property.



SEARCH FOR A USER

All Users

Admin / Users

+ NEW USER

+ Add Filter



Full Name	User Name	User Status	Company	Role	Last Login
rwart+acme@bureauverita	Acme_Demo	Active	Bureau Veritas	Administrator	03/09/2023
@email.com	JSmith@email.com	Active	Acme Demo	Sampler + Reports	
Melissa Wood	MWood@email.com	Active	Acme Demo	Manager	
Sarah Jones	SJones@email.com	Active	Acme Demo	Sampler	

Insert a value. The value field should be filled out based on the property you selected. In this example, because Full Name is the property and the type is contains, this filter will display all users with 'sarah' in their full name.

SEARCH FOR A USER

All Users

Admin / Users

[+ NEW USER](#)

Full Name contains sarah x

[+ Add Filter](#)



Full Name	Email	User Name	User Status	Company	Role	Last Login
Sarah Jones	SJones@email.com	SJones@email.com	Active	Acme Demo	Sampler	



Click on the user's name to open the User Details page.



MOVE A USER / MODIFY ACCESS

User Details for Sarah Jones

[Admin](#) / [Users](#) / Sarah Jones

[← BACK](#)





Sarah Jones

SJones@email.com

Last sign in: Never

Created On: March 8, 2023

 Change Password

 Reset Password

User Details

Permissions

Attributes

Data Access

USER GROUPS

Shown below are all the groups for Sarah Jones



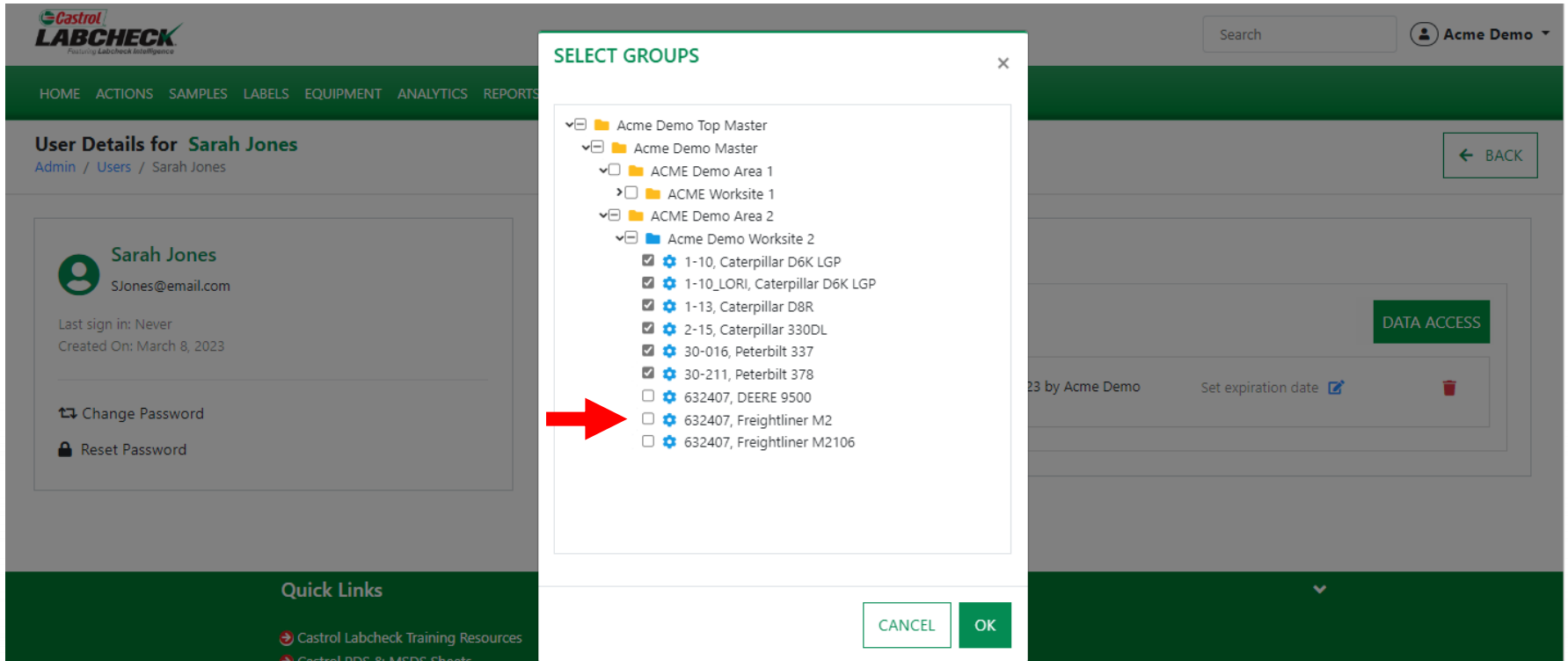
Acme Demo Worksite 2

Added on 03/08/2023 by Acme Demo

DATA ACCESS

From the User Details page, click on the **Data Access** tab. You can see the worksite(s) the user has access to. Add or modify access by selecting the **DATA ACCESS** button.

MOVE A USER / MODIFY ACCESS



The screenshot displays the user management interface for Sarah Jones. A modal window titled "SELECT GROUPS" is open, showing a hierarchical tree of groups. A red arrow points to the "632407, Freightliner M2" entry, which has a checked checkbox. The "OK" button is highlighted in green.

SELECT GROUPS

- Acme Demo Top Master
 - Acme Demo Master
 - ACME Demo Area 1
 - ACME Worksite 1
 - ACME Demo Area 2
 - Acme Demo Worksite 2
 - 1-10, Caterpillar D6K LGP
 - 1-10_LORI, Caterpillar D6K LGP
 - 1-13, Caterpillar D8R
 - 2-15, Caterpillar 330DL
 - 30-016, Peterbilt 337
 - 30-211, Peterbilt 378
 - 632407, DEERE 9500
 - 632407, Freightliner M2
 - 632407, Freightliner M2106

Cancel **OK**

If the checkbox is selected next to a location or unit, the user can view it online. Toggle on or off as needed. Select the **OK** button to update.

MOVE A USER / MODIFY ACCESS

User Details for Sarah Jones

[Admin](#) / [Users](#) / Sarah Jones

[← BACK](#)




Sarah Jones

SJones@email.com

Last sign in: Never

Created On: March 8, 2023

 Change Password



 Reset Password

User Details Permissions Attributes **Data Access**

USER GROUPS

Shown below are all the groups for Sarah Jones

DATA ACCESS

 **Acme Demo Worksite 2** Added on 03/08/2023 by Acme Demo Set expiration date 

Excluded:

- 632407, Freightliner M2
- 632407, Freightliner M2106
- 632407, DEERE 9500



Changes will be reflected in the User Groups.
Go directly to the Group Hierarchy by clicking on the folder or worksite listed.



MOVE A USER

Group Hierarchy

Admin / Groups

- Acme Demo Top Master
 - Acme Demo Master
 - ACME Demo Area 1
 - ACME Worksite 1
 - ACME Demo Houston , TX
 - ACME Demo Area 2
 - Acme Demo Worksite 2

Users

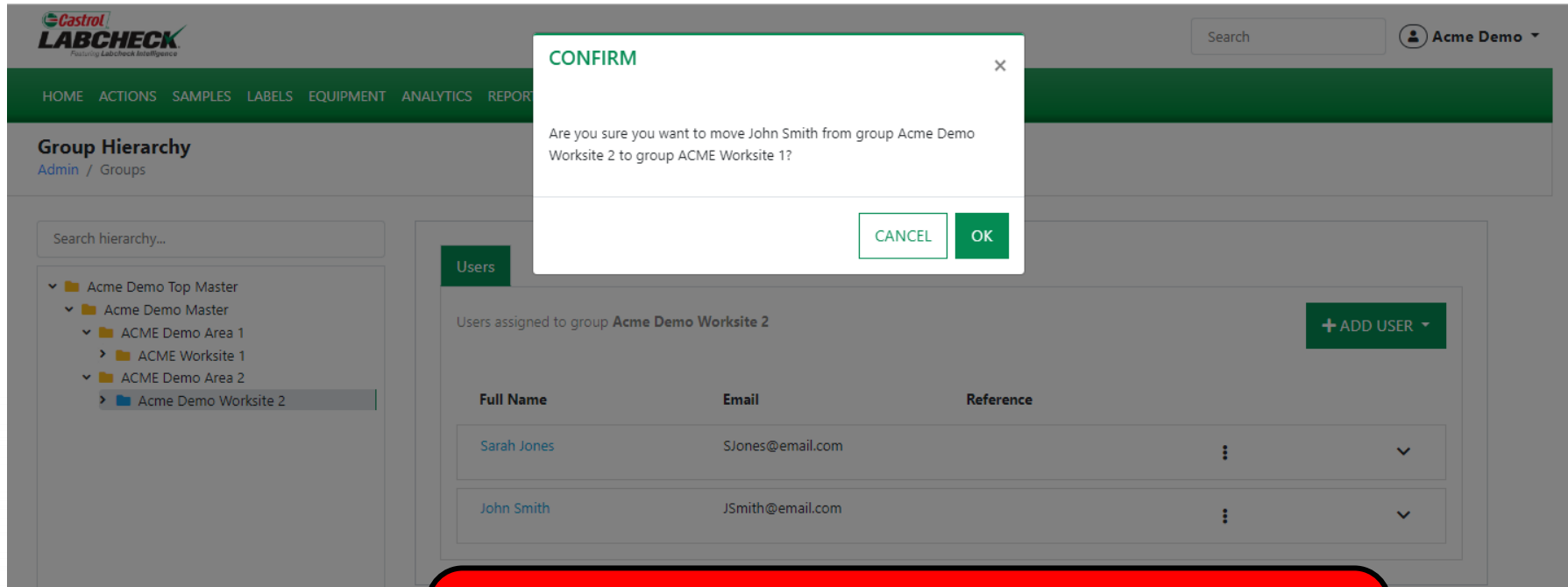
Users assigned to group **Acme Demo Worksite 2** + ADD USER ▾

Full Name	Email	Reference
JSmith@e mail.com	SJones@email.com	⋮ ▾
John Smith	JSmith@email.com	⋮ ▾

A second way to modify access is from the Group Hierarchy. Select the worksite the user is currently in. A list of users will display on the right. Click on the user you want to move and then 'drag and drop' them into the new worksite.



MOVE A USER



The screenshot shows the Castrol LABCHECK user management interface. A confirmation dialog box is overlaid on the screen, asking for confirmation to move a user. The dialog box has a title bar that says "CONFIRM" and a close button (X). The main text of the dialog asks: "Are you sure you want to move John Smith from group Acme Demo Worksite 2 to group ACME Worksite 1?". At the bottom of the dialog are two buttons: "CANCEL" and "OK".

The background interface shows a "Group Hierarchy" on the left with a tree view containing "Acme Demo Top Master", "Acme Demo Master", "ACME Demo Area 1", "ACME Demo Area 2", and "Acme Demo Worksite 2". The main area shows "Users assigned to group Acme Demo Worksite 2" with a table of users:

Full Name	Email	Reference
Sarah Jones	SJones@email.com	⋮
John Smith	JSmith@email.com	⋮

A message will pop up asking you to confirm your move. Select the **OK** button to complete your move or select the **CANCEL** button to stop the move.



MOVE A USER

Group Hierarchy

[Admin](#) / [Groups](#)

- Acme Demo Top Master
 - Acme Demo Master
 - ACME Demo Area 1
 - ACME Worksite 1**
 - ACME Demo Houston , TX
 - ACME Demo Area 2
 - Acme Demo Worksite 2

Users

Users assigned to group **ACME Worksite 1**

[+ ADD USER](#) ▾

Full Name	Email	Reference	
-----------	-------	-----------	--

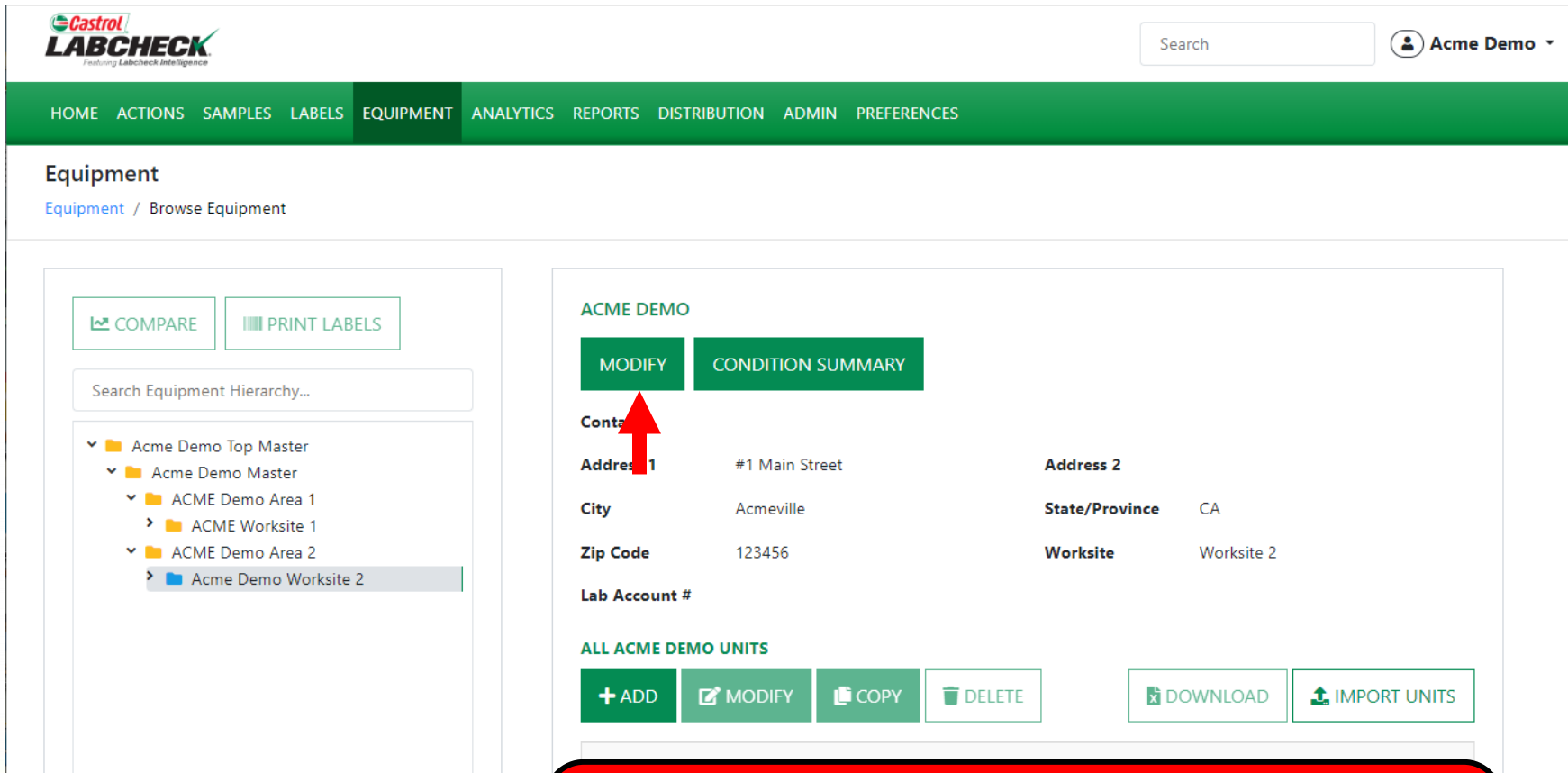
John Smith	JSmith@email.com		
------------	------------------	--	--



Once successfully moved, the user will display under the new folder or worksite.



MODIFYING WORKSITES



The screenshot shows the Castrol LABCHECK web application interface. At the top left is the Castrol LABCHECK logo. To the right is a search bar and a user profile dropdown labeled "Acme Demo". Below this is a green navigation bar with the following menu items: HOME, ACTIONS, SAMPLES, LABELS, EQUIPMENT (highlighted), ANALYTICS, REPORTS, DISTRIBUTION, ADMIN, and PREFERENCES. The main content area is titled "Equipment" and includes a breadcrumb "Equipment / Browse Equipment". On the left side, there are two buttons: "COMPARE" and "PRINT LABELS", followed by a search bar "Search Equipment Hierarchy...". Below the search bar is a tree view of the equipment hierarchy:

- Acme Demo Top Master
 - Acme Demo Master
 - ACME Demo Area 1
 - ACME Worksite 1
 - ACME Demo Area 2
 - Acme Demo Worksite 2 (selected)

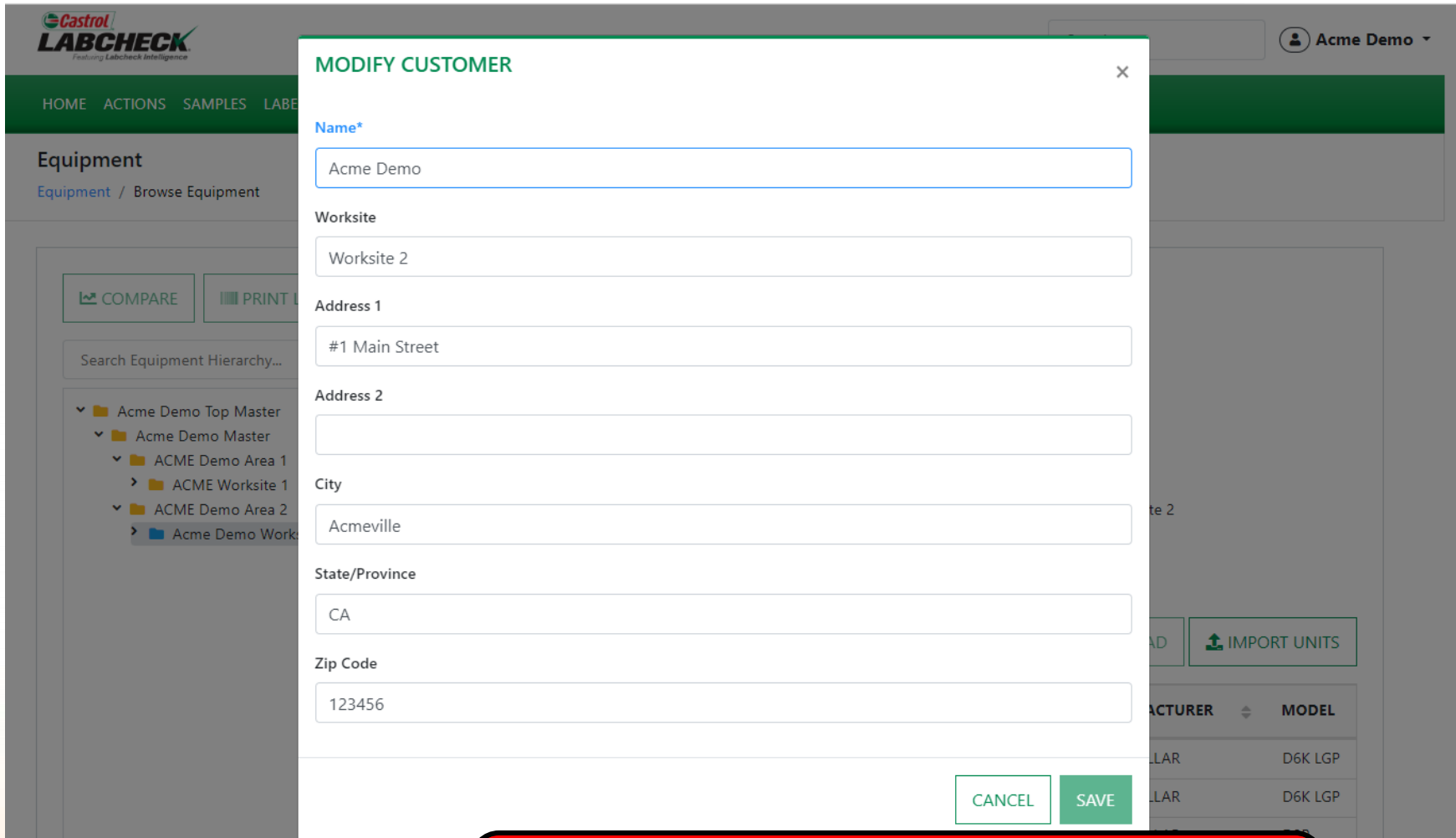
On the right side, the details for "ACME DEMO" are displayed. At the top are two buttons: "MODIFY" (highlighted with a red arrow) and "CONDITION SUMMARY". Below these are the following fields:

Contacts		
Address 1	#1 Main Street	Address 2
City	Acmeville	State/Province CA
Zip Code	123456	Worksite Worksite 2
Lab Account #		

At the bottom of the details section, there is a heading "ALL ACME DEMO UNITS" and a row of buttons: "+ ADD", "MODIFY", "COPY", "DELETE", "DOWNLOAD", and "IMPORT UNITS".

Modifying a worksite is done in the **EQUIPMENT** tab. On the left side, locate the worksite you want to modify and select it. On the right, select the **MODIFY** button.

MODIFYING WORKSITES



MODIFY CUSTOMER [X]

Name*

Worksite

Address 1

Address 2

City

State/Province

Zip Code

[CANCEL] [SAVE]

A new window will open with the Customer details.
Make the required updates and click the **SAVE** button



CASTROL LABCHECK SUPPORT DESK:

Phone: **866-LABCHECK (522-2432)**

Labchecksupport@bureauveritas.com

<https://www.labcheckresources.com/>

