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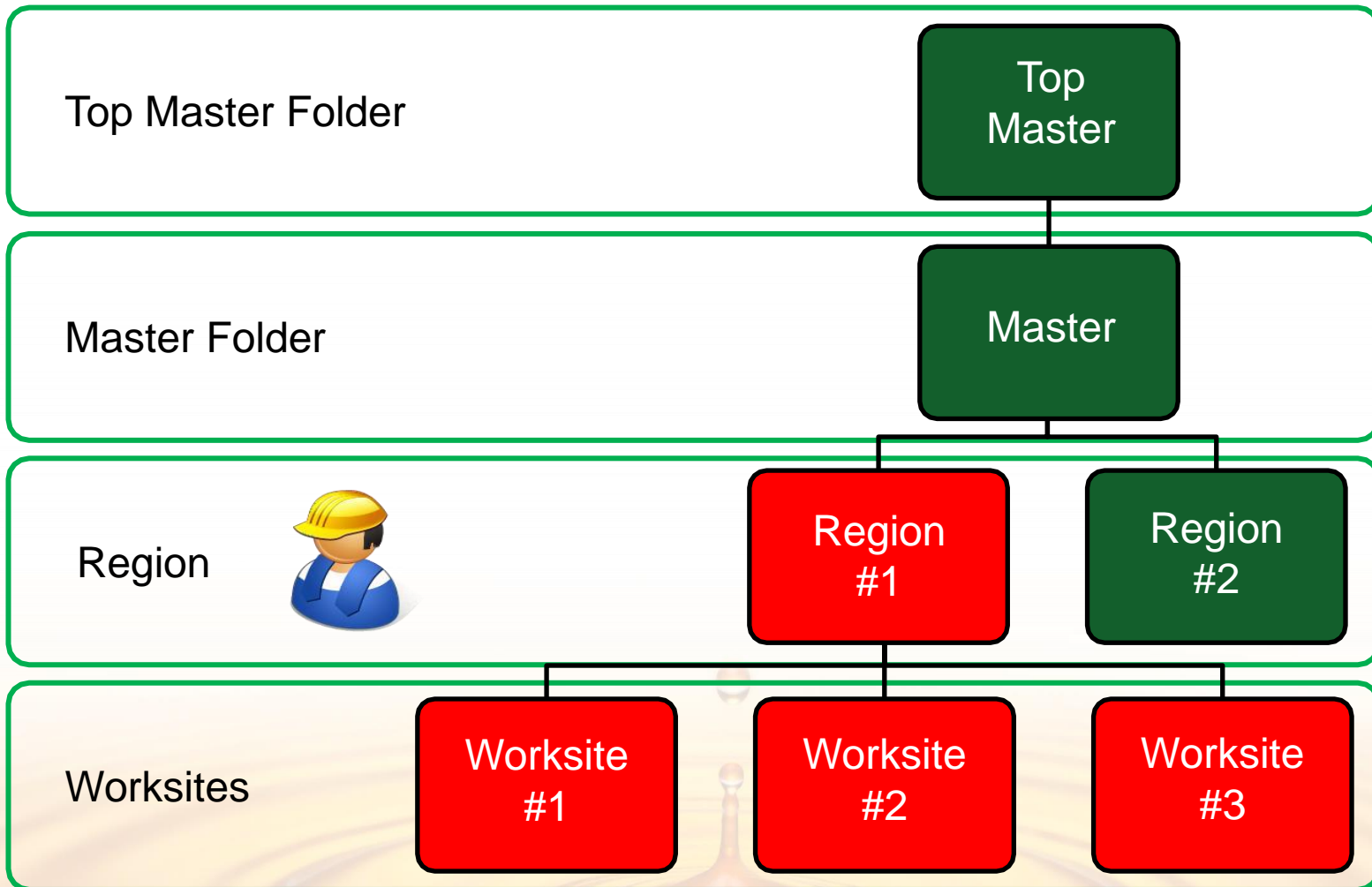
When setting up a new user, there are two things to consider – Data Access and Permissions.

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.

Top Master Folder	Top Master
Master Folder	Master
Region	Region #1 · Region #2
Worksites	Worksite #1 · Worksite #2 · Worksite #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

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

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

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 <u>contain</u> the value input for the given property.

SEARCH FOR A USER

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 ✕   **+ 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.
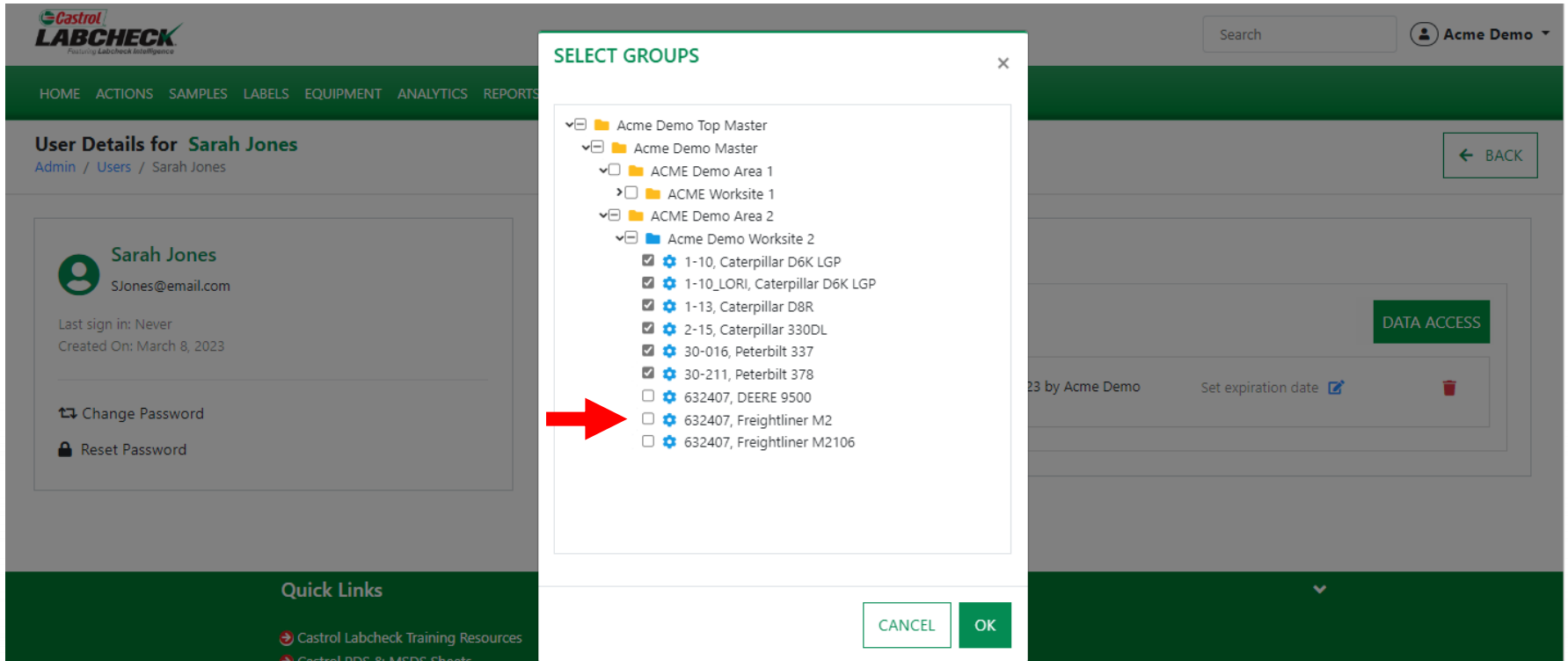
MOVE A USER / MODIFY ACCESS

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

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

MOVE A USER

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

CONFIRM ✕

Are you sure you want to move John Smith from group Acme Demo Worksite 2 to group ACME Worksite 1?

CANCEL · OK

Group Hierarchy
Admin / Groups

Search hierarchy...

- ✓ 📁 Acme Demo Top Master
  - ✓ 📁 Acme Demo Master
    - ✓ 📁 ACME Demo Area 1
      - › 📁 ACME Worksite 1
    - ✓ 📁 ACME Demo Area 2
      - › 📁 Acme Demo Worksite 2

Users
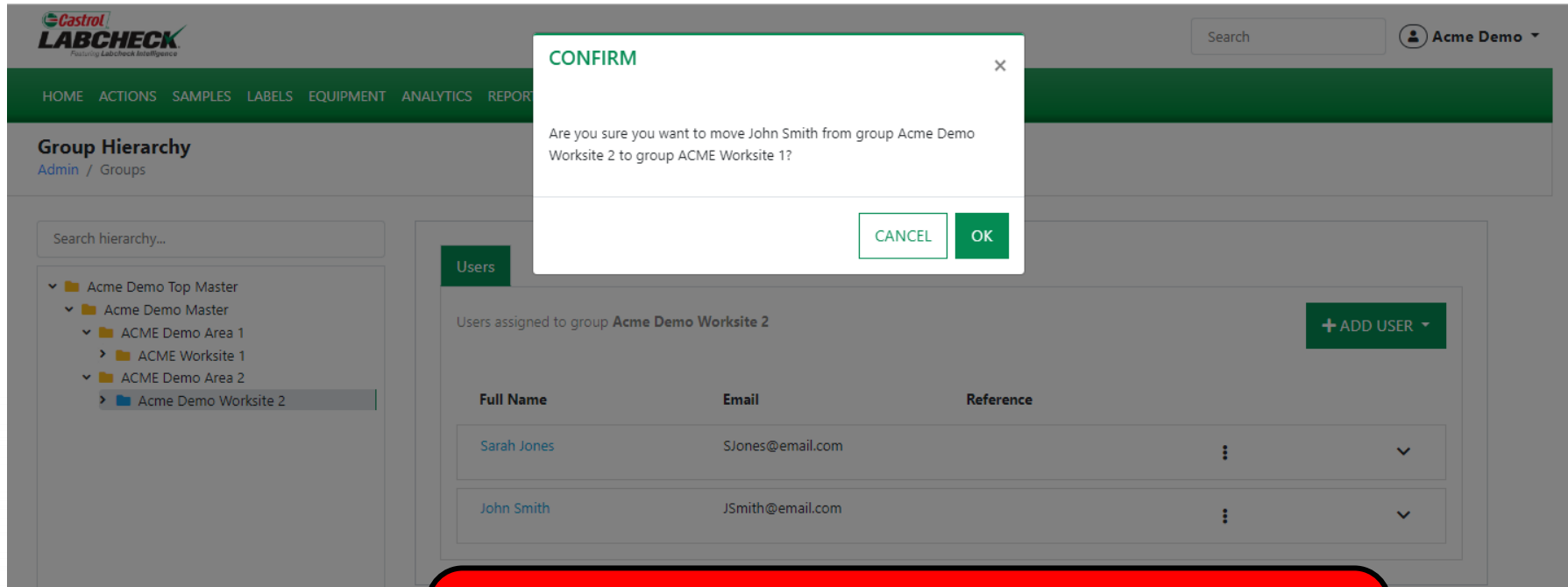
Users assigned to group **Acme Demo Worksite 2**

+ ADD USER ▾

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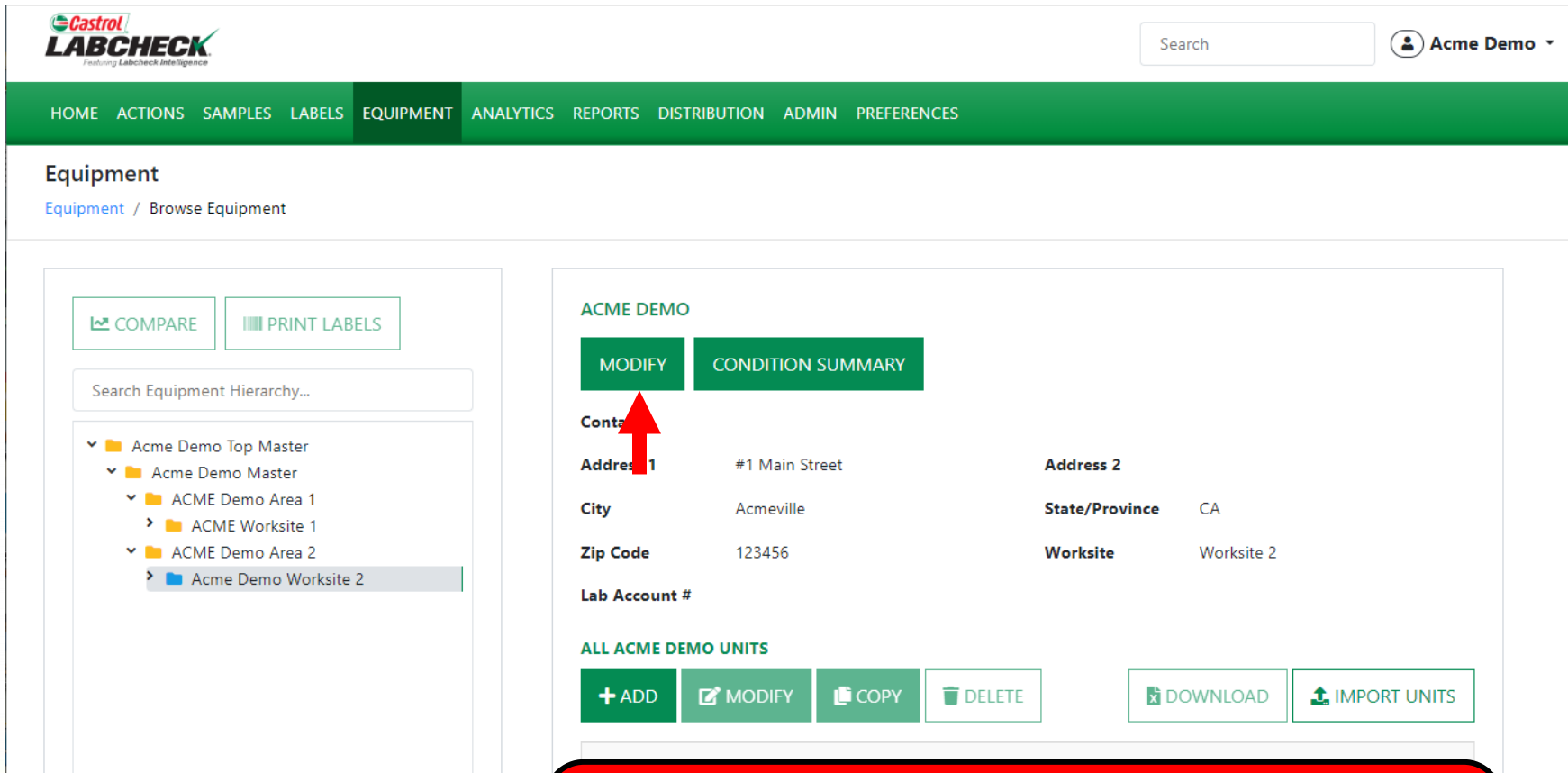
Once successfully moved, the user will display under the new folder or worksite.

MODIFYING WORKSITES

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

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

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