



QUICK START GUIDE

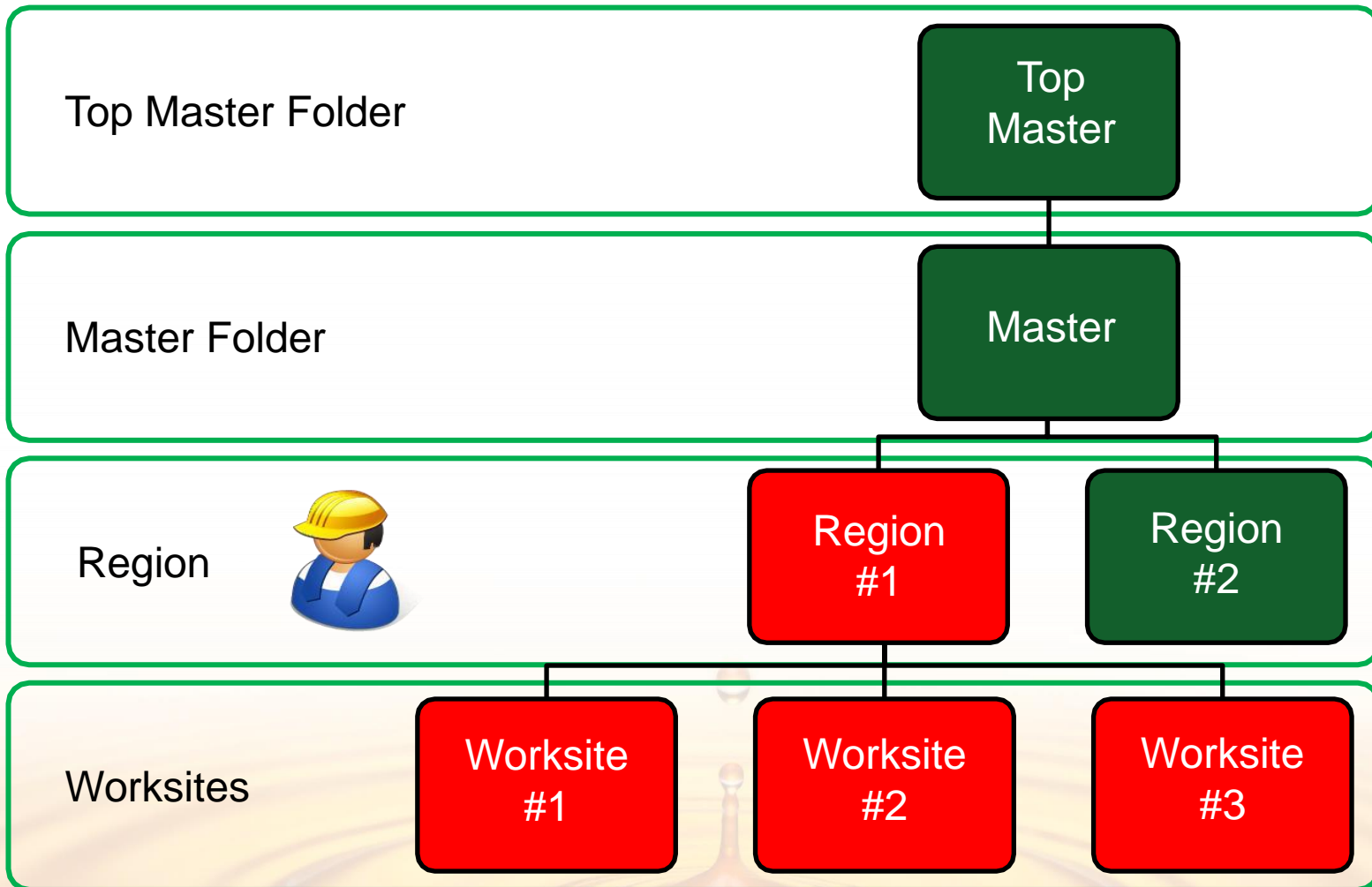
ADMINISTRATOR BASICS

Learn How To:

1. Add Users to the Labcheck System
2. How to Modify or Delete Existing Users
3. How to Reset Passwords

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.



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



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

ADDING NEW USERS

Admin

Manage users and related information



USERS

Add, edit and manage all users



GROUPS

View groups and associated users,
permissions and attributes



Use the **ADMIN** tab to add new users and manage existing users. To start, click on the **ADMIN** tab and then the **GROUPS** tile.

Note: If you do not see the admin tab when logged in, you do not have admin privileges. Please contact the Labcheck support desk.

ADDING NEW USERS

Group Hierarchy

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

- ▾ Acme Demo Top Master
 - ▾ Acme Demo Master
 - > ACME Demo Area 1
 - ▾ ACME Demo Area 2
 - > **Acme Demo Worksite 2**

Users

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



+ ADD USER ▾

Full Name

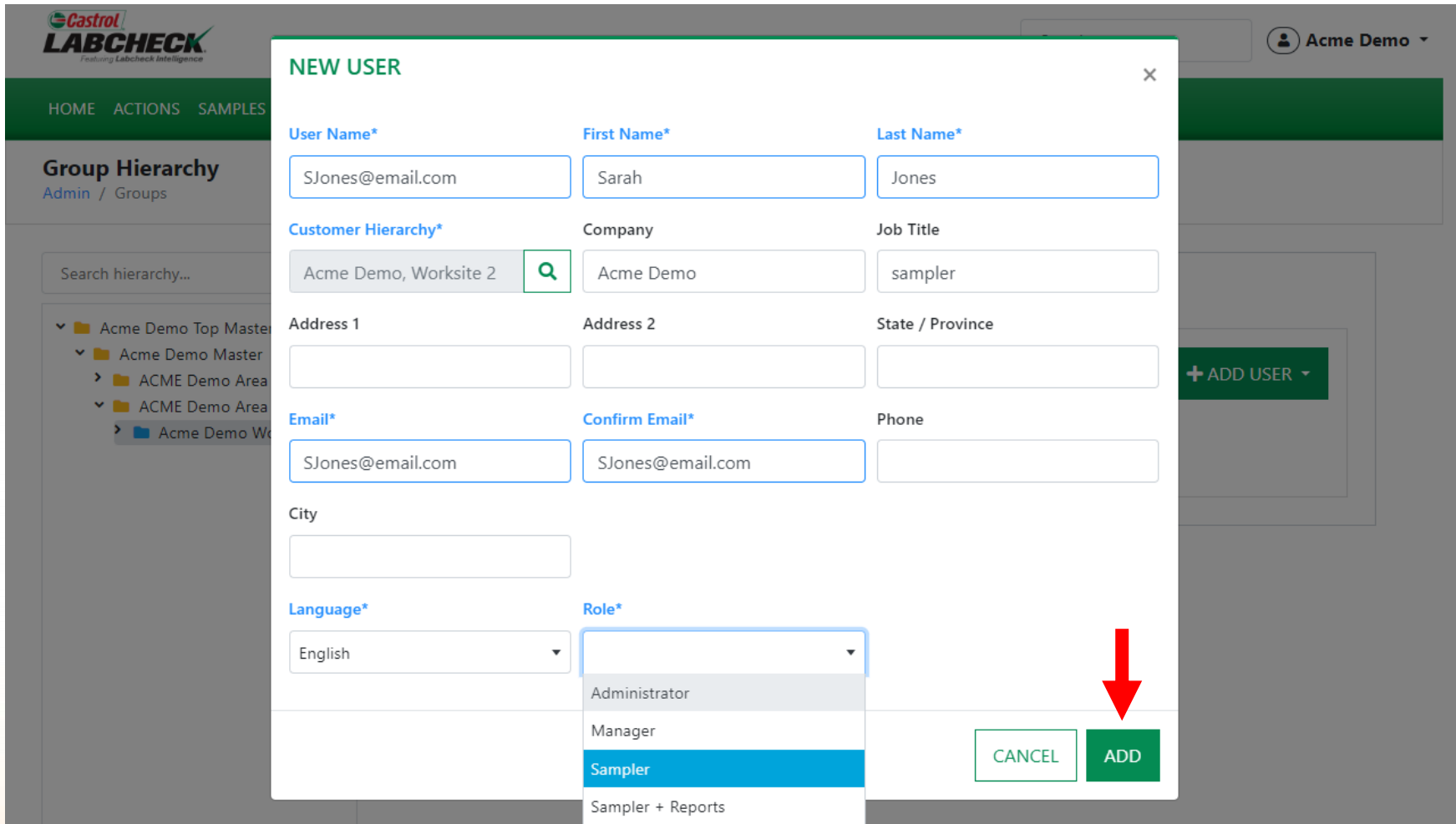
Email

Reference

To add a new user, select the worksite on the left side of the screen that the user needs access to. If a user needs access to multiple locations they must be added to a level above or a master folder level. Once your selection has been made, click on the **+ADD USER** button.

Note: You cannot add users to have the same level of access that you have. In this example, users cannot be added to the Acme Demo Top Master folder

ADDING NEW USERS



NEW USER [X]

User Name*	First Name*	Last Name*
<input type="text" value="SJones@email.com"/>	<input type="text" value="Sarah"/>	<input type="text" value="Jones"/>
Customer Hierarchy*	Company	Job Title
<input type="text" value="Acme Demo, Worksite 2"/> [Q]	<input type="text" value="Acme Demo"/>	<input type="text" value="sampler"/>
Address 1	Address 2	State / Province
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email*	Confirm Email*	Phone
<input type="text" value="SJones@email.com"/>	<input type="text" value="SJones@email.com"/>	<input type="text"/>
City		
<input type="text"/>		
Language*	Role*	
<input type="text" value="English"/>	<input type="text" value="Administrator"/> Administrator Manager Sampler Sampler + Reports	

[CANCEL] [ADD]

Complete all the required fields marked with an *. You **must** assign a role to the new user. Click the **ADD** button to complete the registration. Once saved, users will receive an email with instructions to set their password which will allow them to login.

MODIFYING USERS

Group Hierarchy

Admin / Groups

Search hierarchy...

- Acme Demo Top Master
 - Acme Demo Master
 - ACME Demo Area 1
 - ACME Demo Area 2
 - Acme Demo Worksite 2

Users

Users assigned to group Acme Demo Worksite 2

[+ ADD USER ▾](#)

Full Name	Email	Role	Reference
Sarah Jones	SJones@email.com	Sampler	⋮

To modify a user, select the worksite on the left side of the screen where they are currently set up. On the right, locate the user and click on their name. The User Details page will open.



MODIFYING USERS

User Details for Sarah Jones

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

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


Sarah Jones

SJones@email.com

Last sign in: Never

Created On: March 8, 2023

 Change Password

 Reset Password

User Details

Permissions

Attributes

Data Access

Edit details below for Sarah Jones

SAVE DETAILS

User Name*

SJones@email.com

First Name*

Sarah

Last Name*

Jones

Email*

SJones@email.com

Company

Acme Demo

Job Title

sampler

Phone

Address 1

Address 2

City

State / Province

Reference

Language*

English

Role*

Sampler

User Status




Update any of the user information including the User Status. Toggle it off to disable a user. Click the **SAVE DETAILS** button to update.

MODIFYING USERS

User Details for Sarah Jones


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


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Sarah Jones
SJones@email.com

Last sign in: Never
Created On: March 8, 2023

 Change Password

 Reset Password



User Details Permissions Attributes Data Access

Edit details below for Sarah Jones SAVE DETAILS

User Name*	First Name*	Last Name*
<input type="text" value="SJones@email.com"/>	<input type="text" value="Sarah"/>	<input type="text" value="Jones"/>
Email*	Company	Job Title
<input type="text" value="SJones@email.com"/>	<input type="text" value="Acme Demo"/>	<input type="text" value="sampler"/>
Phone	Address 1	Address 2
<input type="text"/>	<input type="text"/>	<input type="text"/>
City	State / Province	Reference
<input type="text"/>	<input type="text"/>	<input type="text"/>
		User Status
		<input checked="" type="checkbox"/>

Select **Change Password** to change a users password or select **Reset Password** to have an email sent to the user with a link so they can change it.

DATA ACCESS

User Details for Sarah Jones

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

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


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

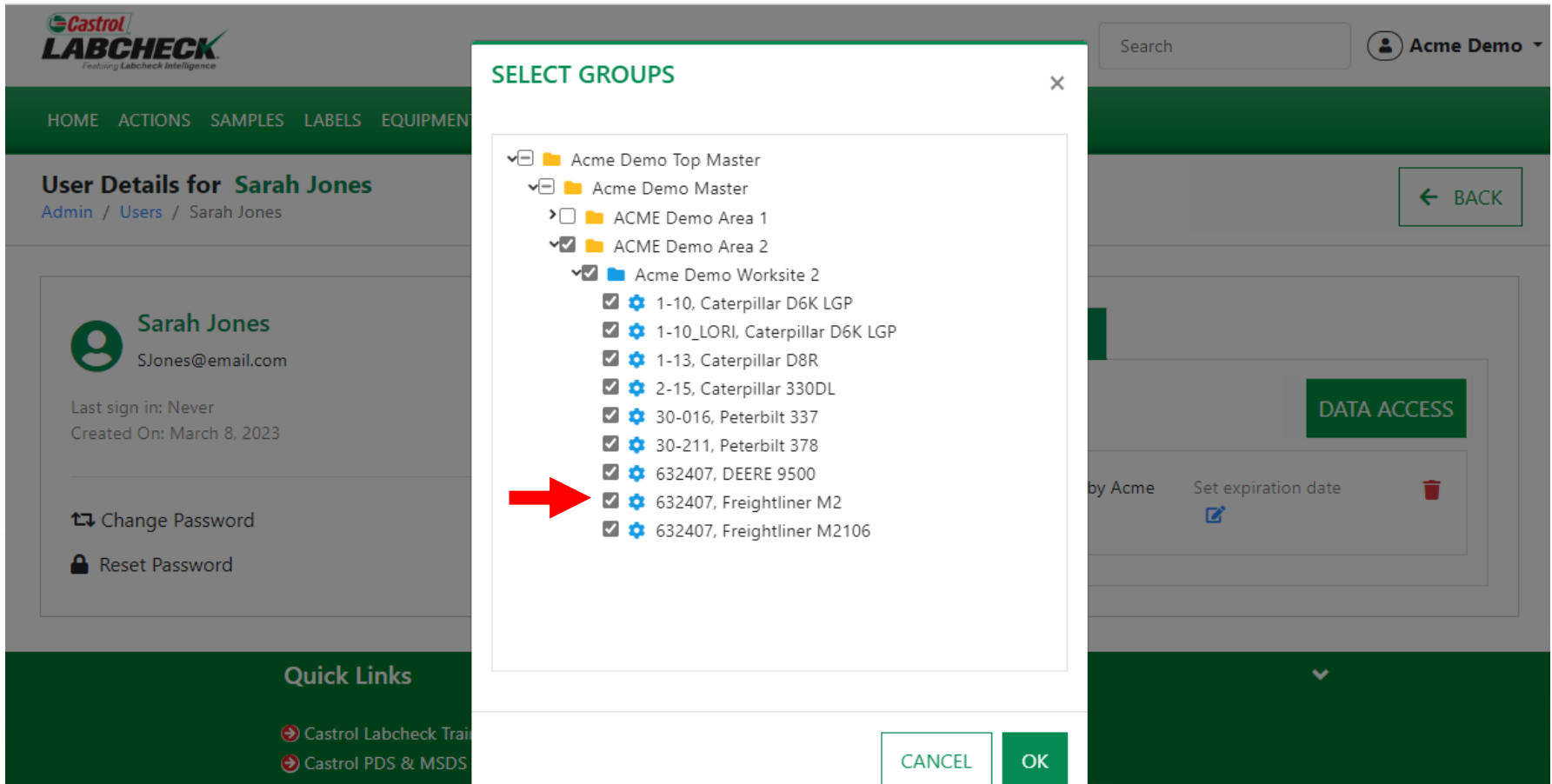
Added on 03/08/2023 by Acme Demo

DATA ACCESS



The **Data Access** tab allows you to modify which worksite(s) a user views. Add or modify access by selecting the **DATA ACCESS** button.

DATA ACCESS



SELECT GROUPS

- Acme Demo Top Master
 - Acme Demo Master
 - ACME Demo Area 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

DATA ACCESS

by Acme Set expiration date

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.

MODIFYING USERS

User Details for Sarah Jones

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


Sarah Jones

SJones@email.com

Last sign in: Never

Created On: March 8, 2023

 Change Password

 Reset Password

User Details

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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



Use the  icon to remove access to the worksite.



CASTROL LABCHECK SUPPORT DESK:

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

Labchecksupport@bureauveritas.com

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

