



## **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.

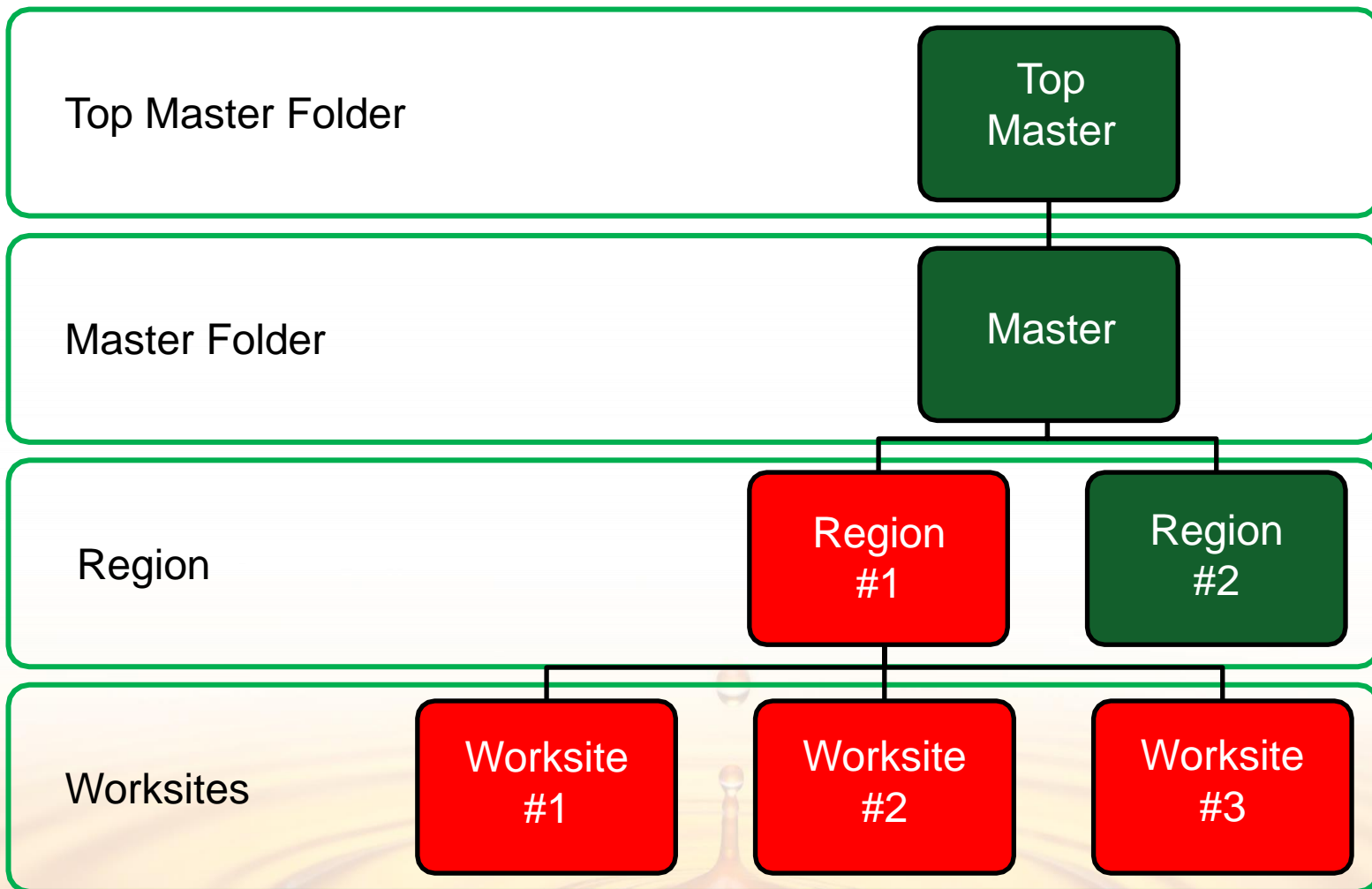
When setting up a new user, there are two things to consider – Data Access and Permissions.

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
<a href="#">Acme Demo</a>	lori.beerwart+acme@bureauveritas.com	Acme_Demo	Active	Bureau Veritas	Administrator	03/09/2023
<a href="#">John Smith</a>	JSmith@email.com	JSmith@email.com	Active	Acme Demo	Sampler + Reports	
<a href="#">Melissa Wood</a>	MWood@email.com	MWood@email.com	Active	Acme Demo	Manager	
<a href="#">Sarah Jones</a>	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



Full Name

Email

User Name

User Status

Company

Role



Email

User Name

User Status

Company

Role

Last Login

lori.beerwart+acme@bureauveritas.com

Acme\_Demo

Active

Bureau Veritas

Administrator

03/09/2023

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 can 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 ×

Contains ▾

sarah 

**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	

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 it 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
<a href="#">Sarah Jones</a>	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

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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**

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 shows the 'User Details for Sarah Jones' page with a 'SELECT GROUPS' modal open. The modal contains a tree view of groups and units. A red arrow points to the checkbox for the unit '632407, Freightliner M2'.

**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

Buttons: 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

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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

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 web application interface. A 'CONFIRM' dialog box is centered on the screen, asking: 'Are you sure you want to move John Smith from group Acme Demo Worksite 2 to group ACME Worksite 1?'. The dialog has 'CANCEL' and 'OK' buttons. In the background, the 'Users' section is visible, showing a table of users assigned to 'Acme Demo Worksite 2'. The table has columns for 'Full Name', 'Email', and 'Reference'. Two users are listed: Sarah Jones and John Smith. A search bar and a '+ ADD USER' button are also visible.

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.





# MODIFY A WORKSITE

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, with 'Acme Demo Worksite 2' selected. On the right side, the details for 'ACME DEMO' are shown, including a 'MODIFY' button (highlighted with a red arrow) and a 'CONDITION SUMMARY' button. The details include fields for 'Address 1', 'City', 'Zip Code', 'Lab Account #', 'Address 2', 'State/Province', and 'Worksite'. At the bottom of the details section, there are buttons for '+ 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.

# MODIFY A WORKSITE

**MODIFY CUSTOMER**

Name\*  
Acme Demo

Worksite  
Worksite 2

Address 1  
#1 Main Street

Address 2

City  
Acmeville

State/Province  
CA

Zip Code  
123456

CANCEL SAVE

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



**CASTROL LABCHECK SUPPORT DESK:**

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