



## **QUICK START GUIDE**

# **ADMINISTRATOR BASICS**

Learn How To:

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

# 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.

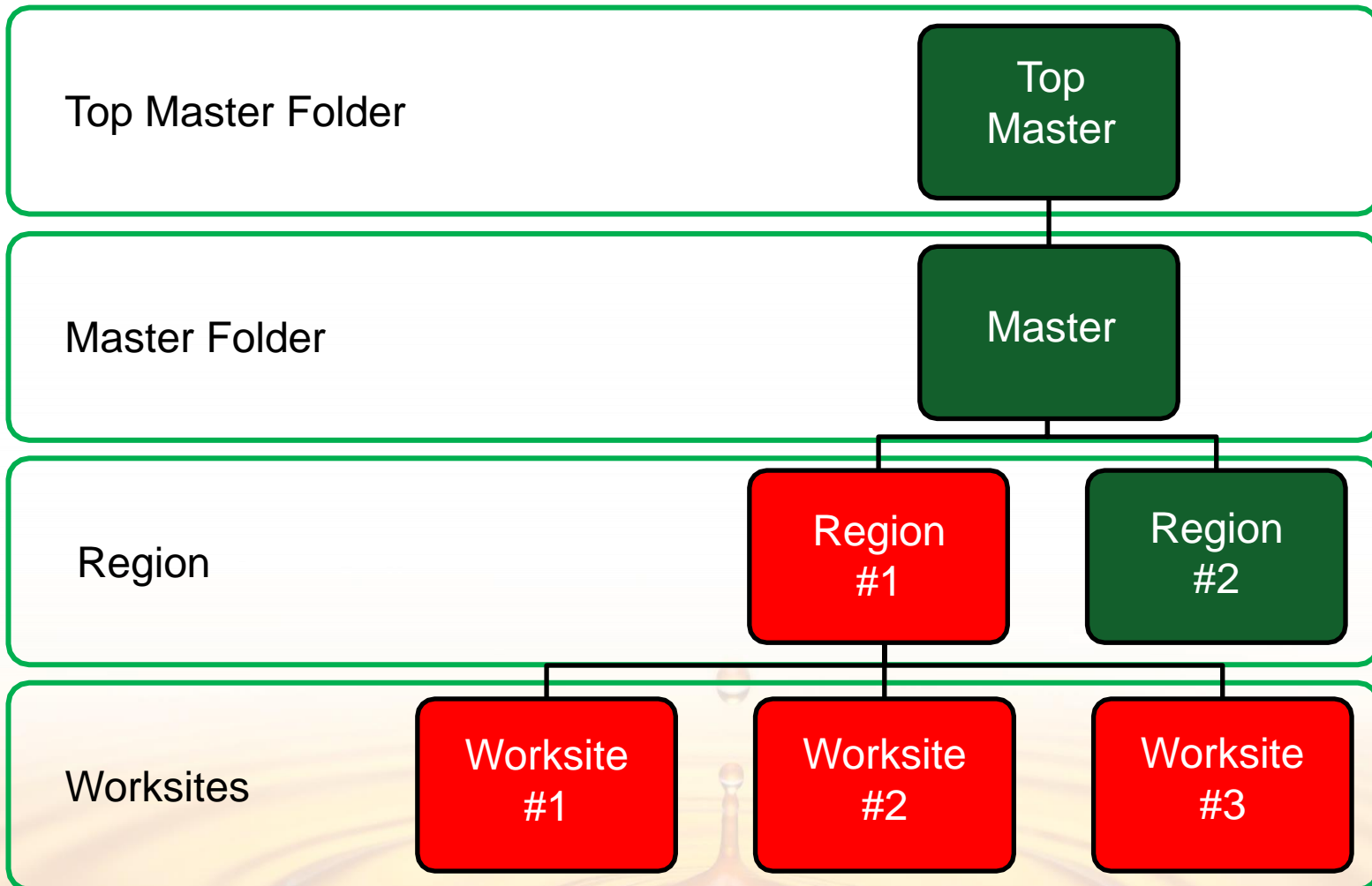
When setting up a new user, there are two things to consider – Data Access and Permissions.

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

# 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

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

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**

User Name: SJones@email.com

First Name\*: Sarah

Last Name\*: Jones

Customer Hierarchy\*: Acme Demo, Worksite 2

Company: Acme Demo

Job Title: Sampler

Address 1:

Address 2:

State / Province:

Email\*: SJones@email.com

Confirm Email\*: SJones@email.com

Phone\*: (780) 444-1234

City:

Language\*: English

Role\*:  
Select Role  
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

[← BACK TO GROUP](#)

 **Sarah Jones**  
SJones@email.com

Last sign in: Never  
Created On: 04/09/2024

 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" value="(780) 444-1234"/>	<input type="text"/>	<input type="text"/>
City	State / Province	Reference
<input type="text"/>	<input type="text"/>	<input type="text"/>
Language*	Role*	User Status
<input type="text" value="English"/>	<input type="text" value="Sampler"/>	<input checked="" type="checkbox"/>

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

[← BACK TO GROUP](#)




Sarah Jones

SJones@email.com

Last sign in: Never

Created On: 04/09/2024

 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

(780) 444-1234

Address 1

Address 2

City

State / Province

Reference

User Status



Select **Change Password** to change a user's 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

[← BACK TO GROUP](#)

 **Sarah Jones**  
SJones@email.com

Last sign in: Never  
Created On: 04/09/2024




 Change Password


 Reset Password

User Details Permissions Attributes **Data Access**

### USER GROUPS

Shown below are all the groups for Sarah Jones

 <a href="#">Acme Demo Worksite 2</a>	Added on 04/09/2024 by Acme Demo	Set expiration date 	
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**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

The screenshot displays the 'SELECT GROUPS' dialog box in the Castrol Labcheck system. The dialog is titled 'SELECT GROUPS' and contains a tree view of equipment groups. The following table represents the data shown in the dialog:

Group Name	Checkbox	Gear Icon	Unit Name
Acme Demo Top Master	<input checked="" type="checkbox"/>		
Acme Demo Master	<input checked="" type="checkbox"/>		
ACME Demo Area 1	<input type="checkbox"/>		
ACME Demo Area 2	<input checked="" type="checkbox"/>		
Acme Demo Worksite 2	<input checked="" type="checkbox"/>		
1-13 Caterpillar D8R	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1-13Lori Caterpillar D8R	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1-13Lori Copy 1 Caterpillar D8R	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
2-15 Caterpillar 330DL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
30-016 Peterbilt 337	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
30-211 Peterbilt 378	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
632407 Freightliner M2106	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
MX3179 Komatsu WA500-1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
MX3180 Volvo A25C	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
MX3181 Volvo A40	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Testing Adding	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

The background interface shows the user profile for Sarah Jones (Admin / Users / Sarah Jones) and a 'DATA ACCESS' section with a 'BACK' button. The 'SELECT GROUPS' dialog has 'CANCEL' and 'OK' buttons at the bottom.

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

Admin / Users / Sarah Jones

← BACK TO GROUP



Sarah Jones

SJones@email.com

Last sign in: Never

Created On: 04/09/2024

↻ 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 04/09/2024 by Acme Demo

Set expiration date 



Use the delete icon to remove access to the worksite.



**CASTROL LABCHECK SUPPORT DESK:**

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

[Labchecksupport@bureauveritas.com](mailto:Labchecksupport@bureauveritas.com)

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

