

# Quick Start Guide

## Creating Report Distributions

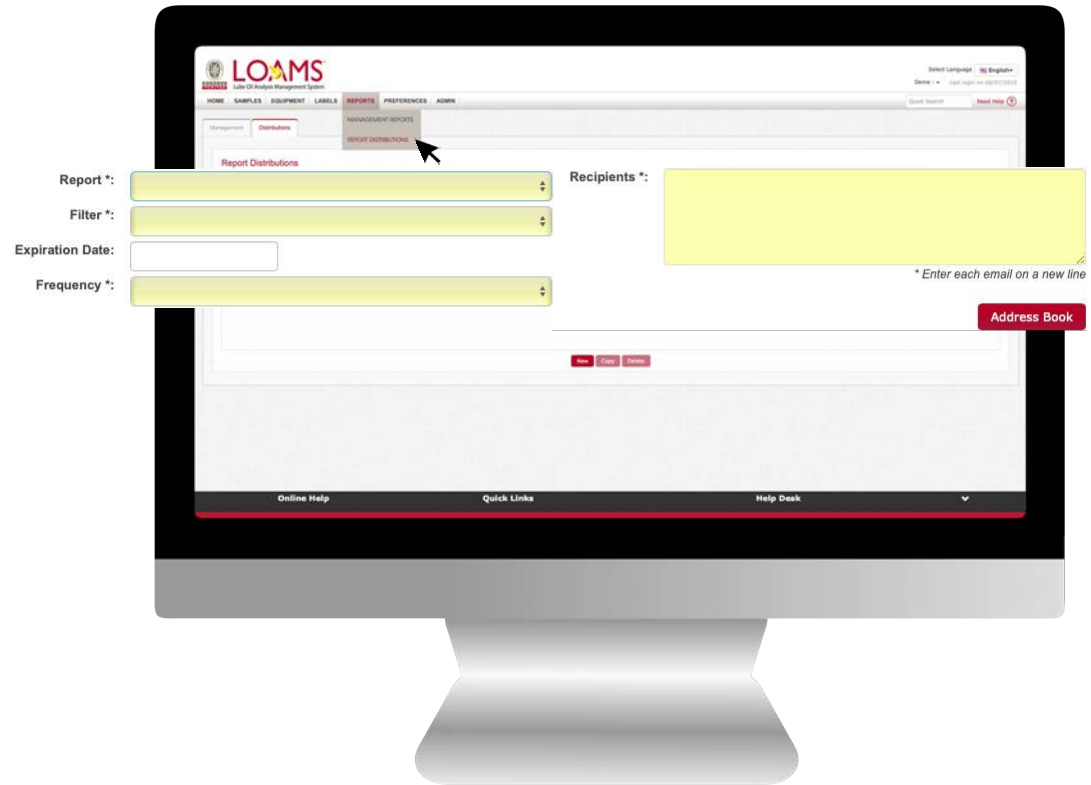
### ○ Objectives:

- 1** Explore the report distribution features available in LOAMS
- 2** Create distribution reports following 10 easy steps
- 3** Learn how send report distributions to one or multiple recipients

## Report Distributions

- The Report Distribution features available in LOAMS allows users to send standard reports, management reports, diagnostic reports, or user customized reports to one or multiple recipients applying:

- ✓ Various reporting options
- ✓ Custom filters
- ✓ Email frequency
- ✓ Limited time-sensitive access




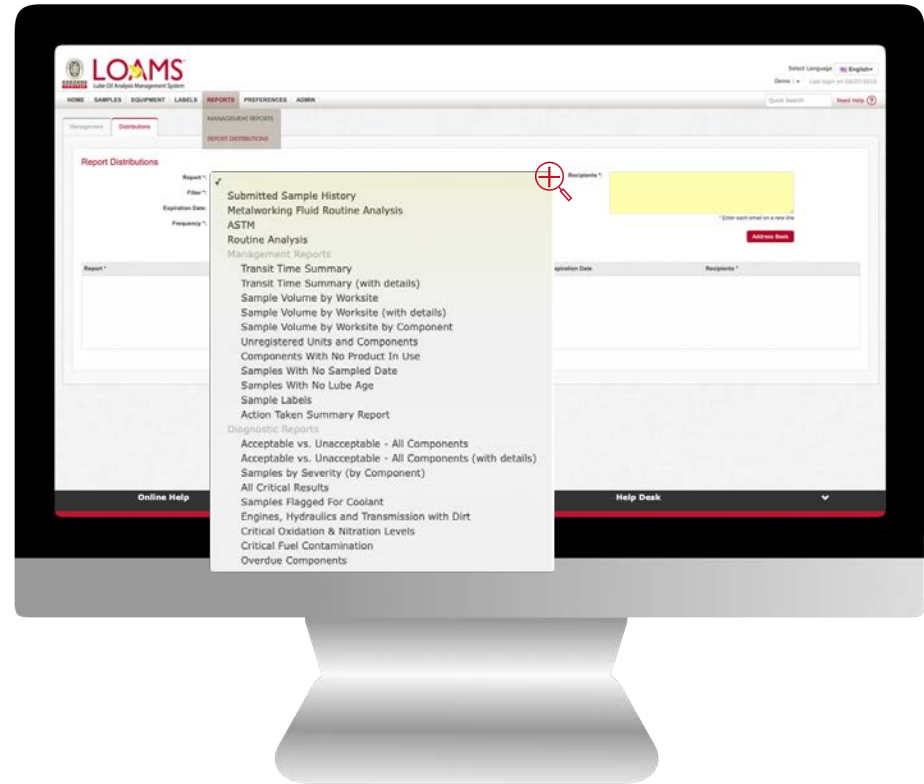
## Report Distributions

- In this quick start guide, you'll explore all the reports that can be easily shared from LOAMS and how these reports can be distributed to the contacts in your address book.

The reports available for distribution from LOAMS are:

- ✓ Submitted Sample History
- ✓ Metalworking Fluid Routine Analysis
- ✓ ASTM
- ✓ Management Reports
- ✓ Diagnostic Reports

 Please note, the management and diagnostic reports contain multiple reports that have been classified using these two categories.



## Report Distributions

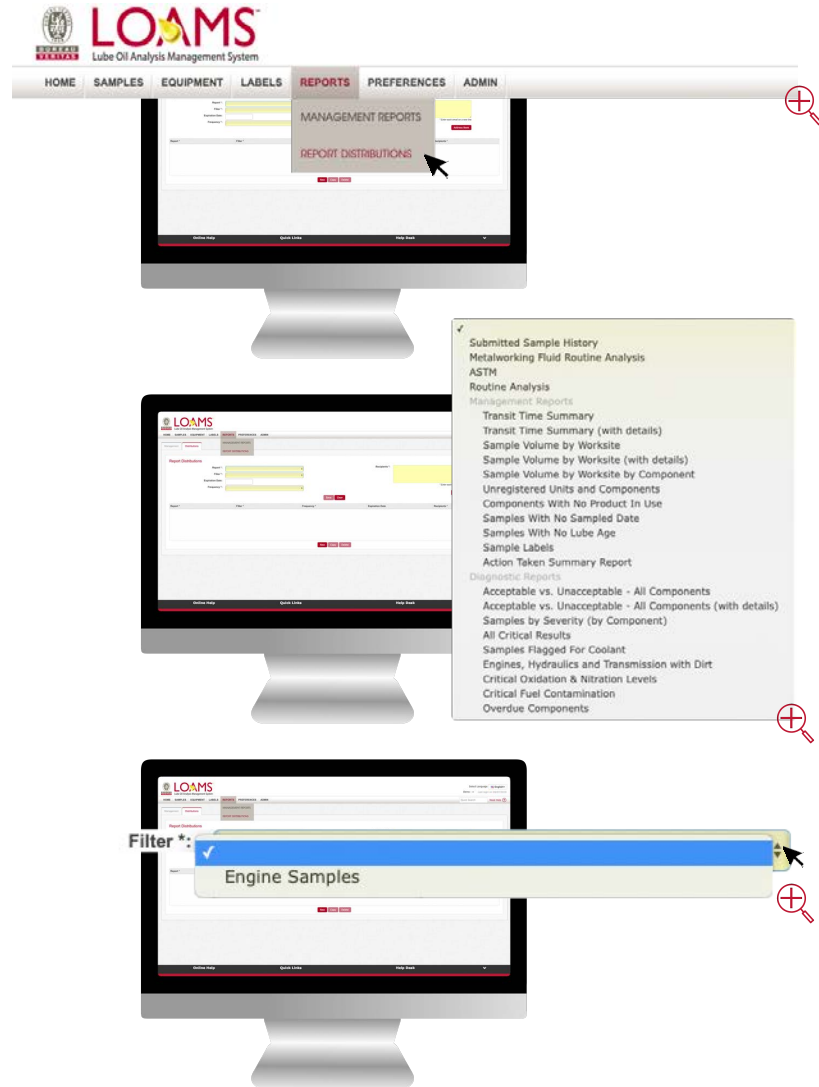
1 Report distributions are easy to create using LOAMS. To begin, hover your cursor to the reports tab and click report distributions from the drop down menu.

2 Click the arrow in the report field to view a drop down list of the reports available. Find the specific report you plan to distribute and select it.

3 Now select the filter you have created to apply to this report.



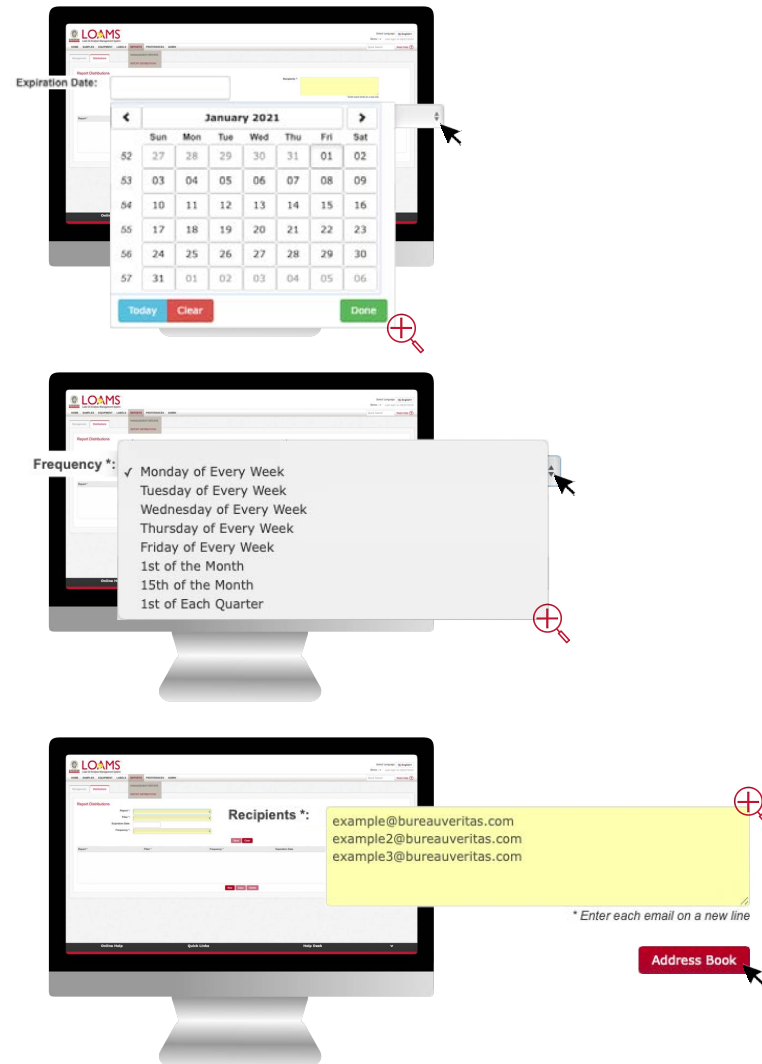
Please note, if you haven't created a filter, you can create one by moving your cursor to the preferences tab, select the filters option from the drop down menu, and click the new filter button. For detailed instructions, please see the Quick Start Guide: *Creating and Managing Filters*.



The screenshots illustrate the LOAMS interface for creating report distributions. The first screenshot shows the 'REPORTS' tab selected in the navigation menu, with a dropdown menu open showing 'REPORT DISTRIBUTIONS' highlighted. The second screenshot shows the 'REPORT DISTRIBUTIONS' dropdown menu expanded, listing various report categories like 'Submitted Sample History', 'Routine Analysis', and 'Diagnostic Reports'. The third screenshot shows the 'Filter' dropdown menu expanded, with 'Engine Samples' selected.

## Report Distributions

- 4 The expiration date is an optional field that allows you to provide time-sensitive access to the recipients of your report distributions. You can enable this feature by selecting the date in which the recipients access to a specific report will expire.
- 5 Under the frequency drop down list, you can configure how often LOAMS should send the report distribution to the respective recipients.
- 6 Click the recipients field and type in the email address of all of the users that will receive the distribution report; each email must be entered on a new line. Now click the address book button to open the address book window — to add and save the email addresses you entered to your address book.



The screenshots illustrate the configuration process in the LOAMS system:

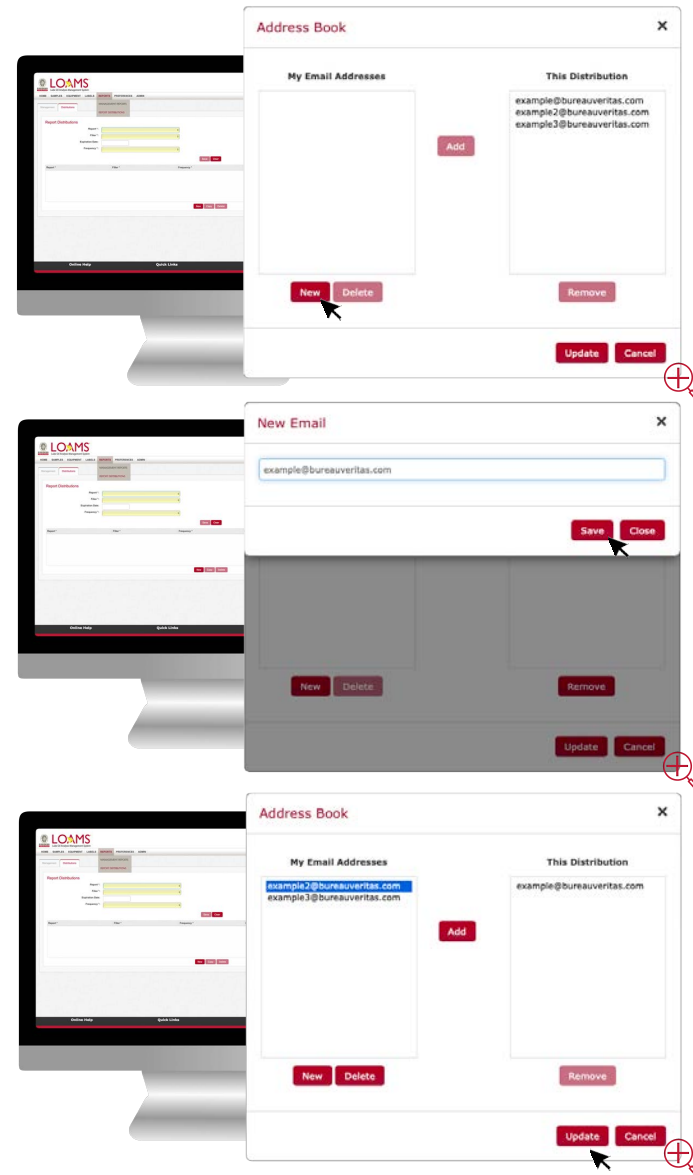
- Expiration Date:** A calendar for January 2021 is shown, with a date selected. The interface includes 'Today', 'Clear', and 'Done' buttons.
- Frequency \*:** A dropdown menu is open, showing options: Monday of Every Week (checked), Tuesday of Every Week, Wednesday of Every Week, Thursday of Every Week, Friday of Every Week, 1st of the Month, 15th of the Month, and 1st of Each Quarter.
- Recipients \*:** A text input field contains three email addresses: example@bureauveritas.com, example2@bureauveritas.com, and example3@bureauveritas.com. A note below the field states: "\* Enter each email on a new line". An 'Address Book' button is visible below the input field.

## Report Distributions

**7** The address book window will display two columns. One column will display all the email addresses in your address book and the other will display the users you have added as recipients of this distribution. To add new users to your address book, click the New button.

**8** Enter the new email address and click save.

**9** Add a contact from your address book as a recipient of this distribution by clicking the Add button. To remove an email address from the distribution, click remove. You can remove recipients in your address book by selecting the email and clicking the delete button. Click the update button to save the preferences you have selected.

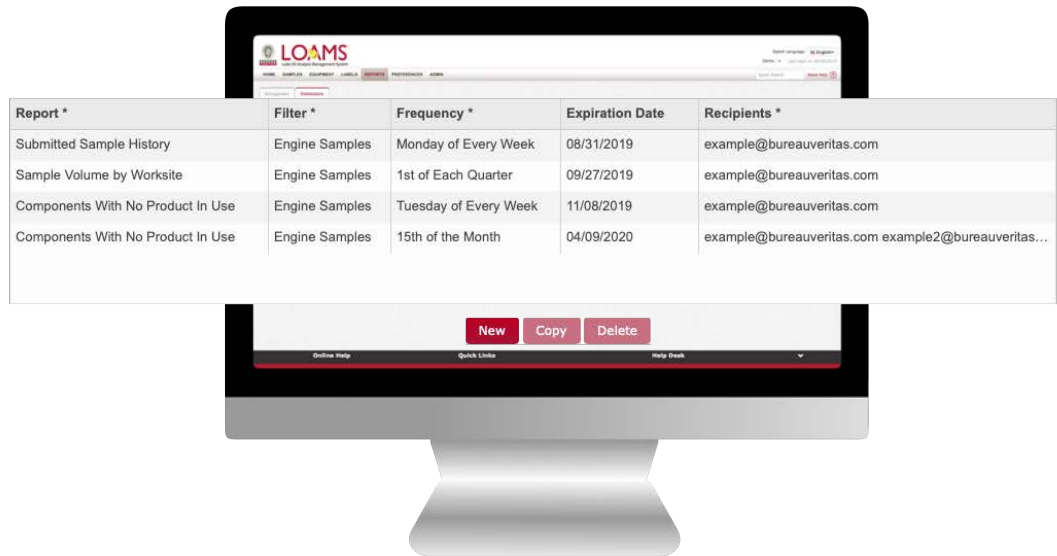


## Report Distributions

**10** Now that you have created a report distribution, click save for the report to appear in your list.



Please note, you can modify an existing report distribution anytime by simply selecting the specific report distribution you plan to edit from the report list. After making modifications, remember to click the save button to save the new changes you have made to a specific distribution.








Report *	Filter *	Frequency *	Expiration Date	Recipients *
Submitted Sample History	Engine Samples	Monday of Every Week	08/31/2019	example@bureauveritas.com
Sample Volume by Worksite	Engine Samples	1st of Each Quarter	09/27/2019	example@bureauveritas.com
Components With No Product In Use	Engine Samples	Tuesday of Every Week	11/08/2019	example@bureauveritas.com
Components With No Product In Use	Engine Samples	15th of the Month	04/09/2020	example@bureauveritas.com example2@bureauveritas...

Below the table, there are three buttons: **New**, **Copy**, and **Delete**.



LOAMS — The Lube Oil Analysis Management System — by Bureau Veritas gives you access to real-time oil analysis data from your computer, tablet or mobile device. LOAMS is:

-  **Cloud-Based** Multiple graphing functions allow users to create custom graphs to plot trends and compare equipment.
-  **Scalable** LOAMS can be scaled to match your needs.
-  **Configurable** Data access, user permissions and system functionalities can be configured by user or company.
-  **Customizable** Users can customize the application to manage data according to individual needs and preferences.
-  **Simple** User-friendly interface provides a simple and easy-to-use application for all skill levels.





## LOAMS SUPPORT DESK

**Phone:** 1.800.655.4473

**Email:** [LOAMS@us.bureauveritas.com](mailto:LOAMS@us.bureauveritas.com)

