



LOAMSSM

Lube Oil Analysis Management System

Quick Start Guide: Administrator Advanced



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VERITAS**

Move Forward with Confidence

Administrator Advanced



► Learn about:

1. Creating customized roles in LOAMS
2. Searching and moving users in the hierarchy
3. Modifying accounts
4. Applying equipment restrictions for worksites

Data Access & Roles



LOAMS 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 take into account – Data access and Roles. See definitions below:

Data Access

- Determines worksites and equipment viewed by user

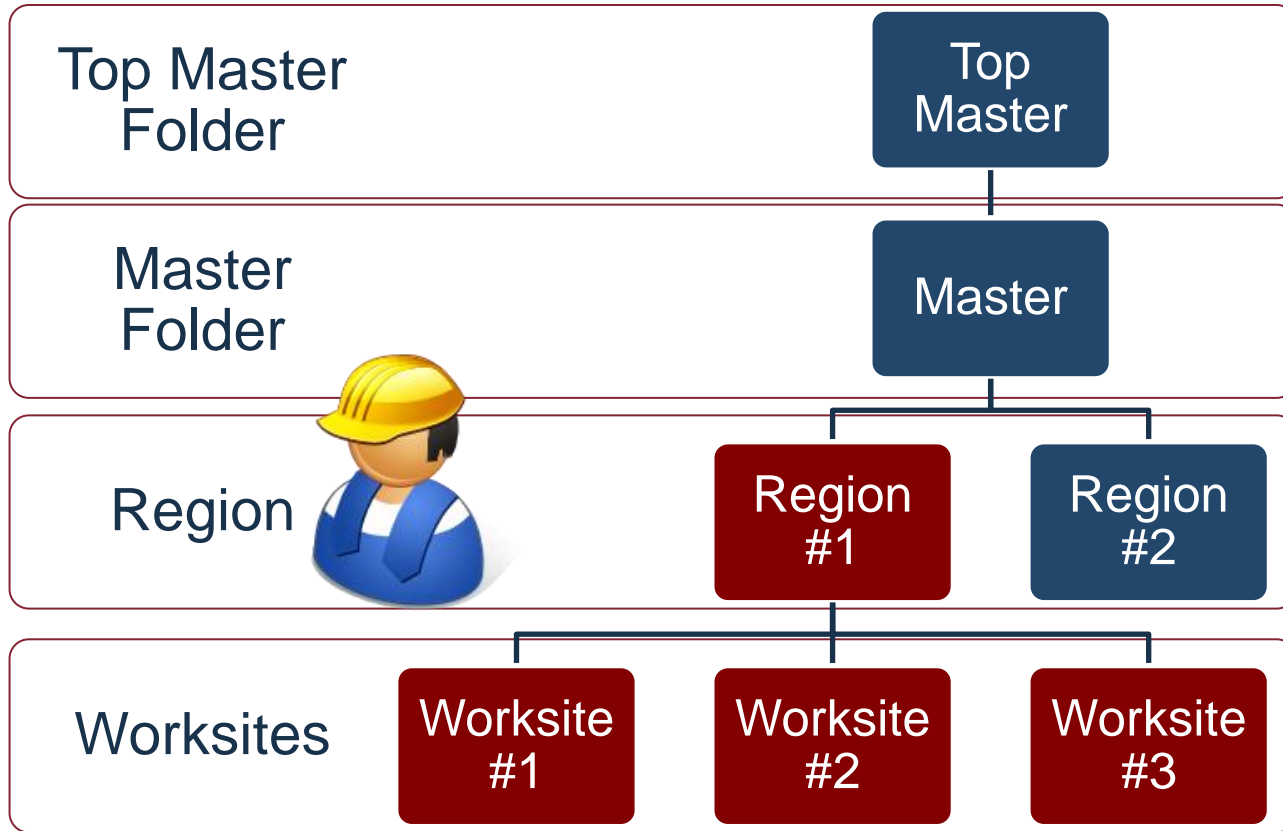
Roles

(Permission Levels)

- Determines what features a user has access to

Data Access Explanation

Below is an example of Data Access: Our user is set up at the Region #1 folder and 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. Below explains each default role:



Administrator

- Manage Users, Add/Modify user accounts
- Equipment Management, Move/Update Unit & Component Records
- Run Management Reports



Manager

- Equipment Management, Move/Update Unit & Component Records
- Run Management Reports



Sampler + Report

- Can Only View Equipment / Print Labels
- Run Management Reports



Sampler

- Can Only View Equipment / Print Labels

Creating a Custom Role



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HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

Customer Hierarchy

ACME CORPORATION - PARTS, Cincinnati, OH



- ACME CORPORATION - PARTS, Cincinnati, OH
 - ACME - CENTRAL OHIO MARKET
 - Users
 - Acme - 180260, Circleville Recycling MRF
 - Acme - 180513, Richland County Recycling
 - Acme - 180520, Columbus OH Recycling MRF
 - Users
 - Acme - 180680, Chillicothe Recycling
 - Acme - 180690, MT. Vernon Recycling
 - Acme - 20140, Beech Hollow Landfill
 - Acme - 20160, PIKE COUNTY LANDFILL
 - Acme - 20511, Harvard Road Transfer Sta.
 - Acme - 20512, Noble Road Landfill
 - Acme - 20514, Richland County Transfer Sta.
 - Acme - 20520, Columbus OH Transfer Sta.
 - Acme - 70060, Ohio Valley Shop
 - Acme - 70063, Ohio Valley Transfer Sta
 - Acme - 70140, Beech Hollow Garage
 - Acme - 70160, PIKE COUNTY
 - Acme - 70260, Circleville
 - Acme - 70262, Circleville Transfer Station
 - Acme - 70511, Cleveland
 - Acme - 70514, Mansfield Weld Shop
 - Acme - 70515, Mansfield
 - Acme - 70520, Columbus OH

Details

Users

Roles

Customer Settings

Acme - 180520, Columbus OH Recycling MRF

Add Modify Delete



| Role Name | Manage Users | Manage Units | Register Samples | Manage Reports |
|-----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Administrator | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Manager | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Sampler | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Sampler+Reports | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

To create a customized role for an individual worksite, select the **Worksite** from the hierarchy tree on the left side of the page. If you want the custom role to be applied to multiple locations, select on the **Master Folder** in the tree. On the right side, click on the **Roles** tab and then click the **Add** button.

Creating a Custom Role

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 - Acme - 180680, Chillicothe Recycling
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 - Acme - 70515, Mansfield
 - Acme - 70520, Columbus OH

Add Role

Name*

Demo Role

- Manage Users
- Manage Units
- Manage Reports
- Register Samples

Save

Cancel

A new window will open where you **must** assign a name to your new role and **assign** which features this role will have access to. Once complete click on the **Save** button.

Modifying/Deleting a Role



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Details

Users

Roles

Customer Settings

Acme - 180520, Columbus OH Recycling MRF

Add

Modify

Delete



| Role Name | Manage Users | Manage Units | Register Samples | Manage Reports |
|-----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Administrator | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Manager | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Sampler | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Sampler+Reports | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Once saved, the new role will appear in the roles table. To modify or delete a role, click on the **Role Name** (the row will highlight in gray) and then click the **Modify** or **Delete** buttons.

Searching for Users



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HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

Customer Hierarchy

Joe Smith (joesmith1@acme.com)



- ACME CORPORATION - PARTS, Cincinnati, OH
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 - Users
 - Joe Smith
 - Mike Klein
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 - Acme - 70260, Circleville
 - Acme - 70262, Circleville Transfer Station
 - Acme - 70511, Cleveland
 - Acme
 - Acme

Details

Users

Roles

ACME - CENTRAL OHIO MARKET Users

Add Modify Delete

| Role Name | Manage Users | Manage Units |
|-----------------|-------------------------------------|-------------------------------------|
| Administrator | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Manager | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Sampler | <input type="checkbox"/> | <input type="checkbox"/> |
| Sampler+Reports | <input type="checkbox"/> | <input type="checkbox"/> |
| Custom Role 2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Custom Role | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Find users or locations easily by using the **Search Bar** on the left side of the screen under **Customer Hierarchy**. You can search for a user by entering their name or email address. You can also search for a location by entering the company name. A drop down list will appear with results that match your search criteria. Select the user or company you're searching for by clicking on the name in the list.

Searching for Users



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- HOME
- SAMPLES
- EQUIPMENT
- LABELS
- REPORTS
- PREFERENCES
- ADMIN

Customer Hierarchy

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 - Acme - 70515, Mansfield
 - Acme - 70520, Columbus OH

Details

User Details | Data Access | Joe Smith

First Name: Joe **Last Name:** Smith

Username: joesmith1@acme.com **Email:** joesmith1@acme.com

Job Title: **Company:** Acme

Role: Sampler+Reports

[Reset Password](#)

Clicking on a user will automatically open up the hierarchy where they are set up. Clicking on the worksite will bring you to the worksite folder.

Moving Users



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HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

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 - Acme - 180690, MT. Vernon Recyc ✓
 - Acme - 180740, Beech Hollow Landfill • joesmith1@acme.com
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Details

Users

Roles

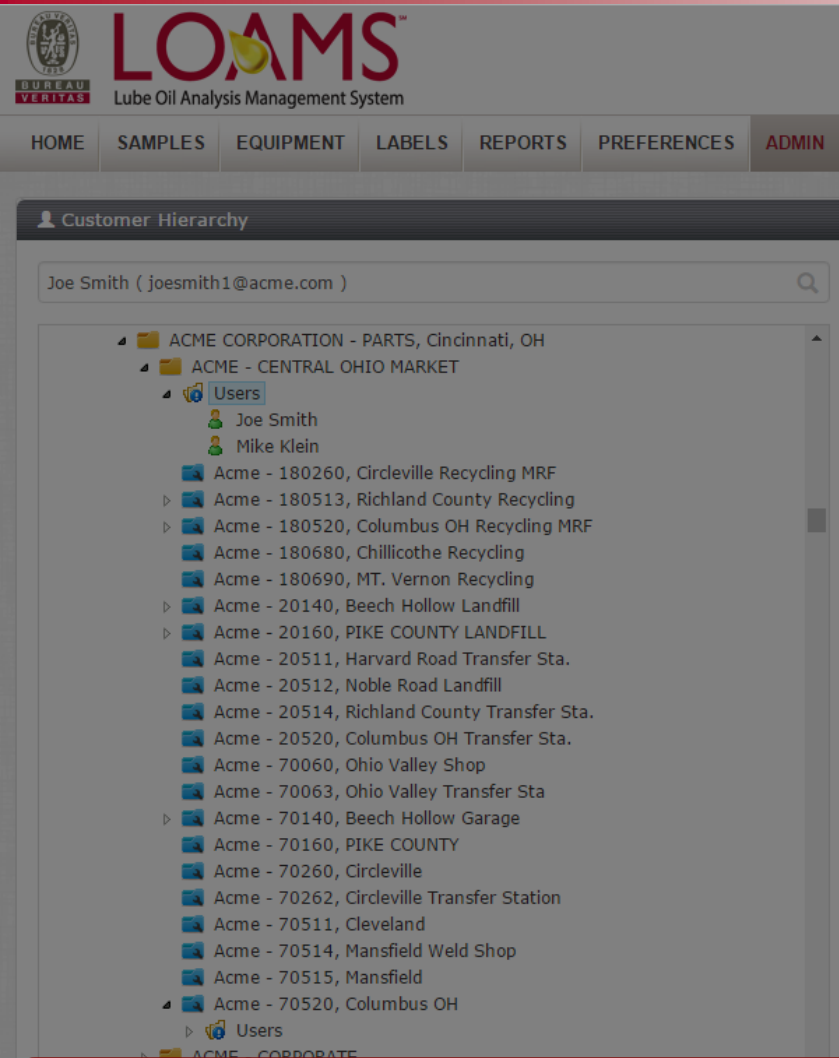
ACME - CENTRAL OHIO MARKET Users

Add Modify Delete Reset Password

| Username | Full Name | Email |
|--------------------|------------|--------------------|
| joesmith1@acme.com | Joe Smith | joesmith1@acme.com |
| mikeklein@acme.com | Mike Klein | mikeklein@acme.com |

You can move a user to a new location (or give access to multiple by moving to the master folder) in two different ways. First, select the **worksites** the user is currently set up at on the left. On the right, click on the user and **hold** your mouse down to drag and drop them on top of the new location you want them to be at. Release your mouse when you see the new location highlighted in blue with a small green arrow and the username with a green checkmark.

Moving Users



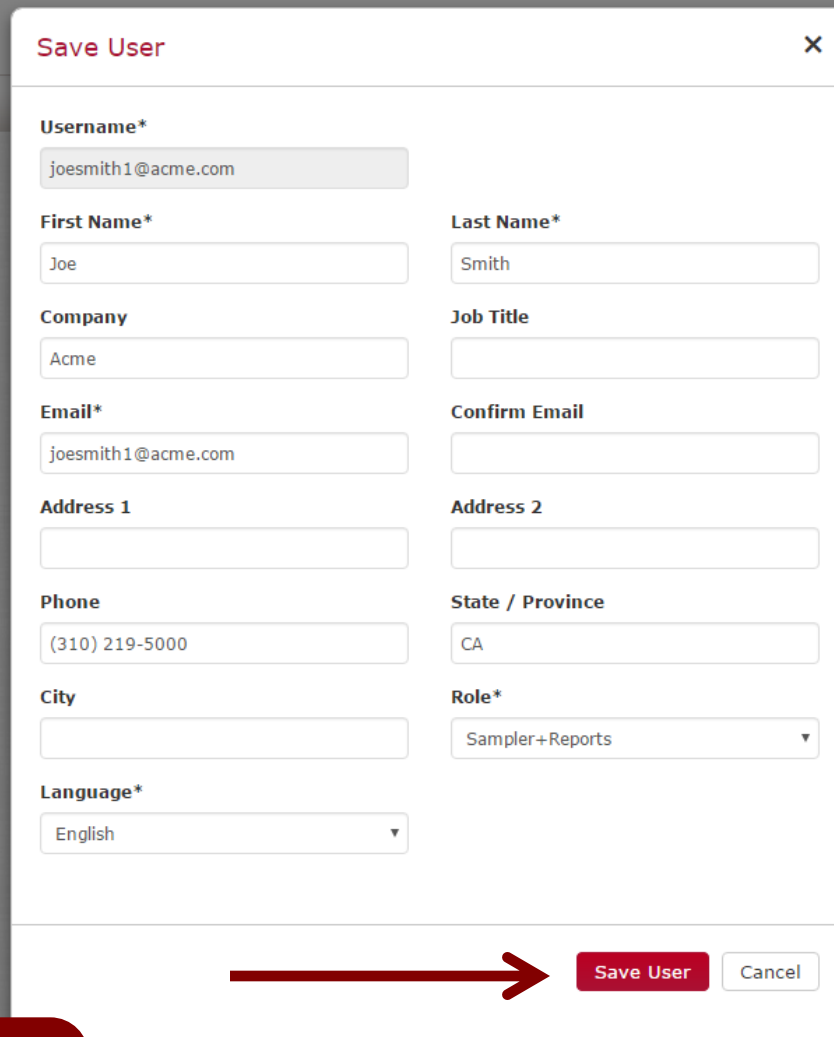
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HOME | SAMPLES | EQUIPMENT | LABELS | REPORTS | PREFERENCES | ADMIN

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 - Acme - 70515, Mansfield
 - Acme - 70520, Columbus OH
 - Users



Save User

Username*
joesmith1@acme.com

First Name*
Joe

Last Name*
Smith

Company
Acme

Job Title

Email*
joesmith1@acme.com

Confirm Email

Address 1

Address 2

Phone
(310) 219-5000

State / Province
CA

City

Role*
Sampler+Reports

Language*
English

Save User Cancel

A screen will open up where you can make further adjustments if needed. Click **Save User** to save the customer in their new location.

Moving Users



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HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

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Details

User Details Data Access Joe Smith

First Name: Joe

Last Name: Smith

Username: joesmith1@acme.com

Email: joesmith1@acme.com

Job Title:

Company: Acme

Role: Sampler+Reports

Reset Password

Users can also be moved on the left side of your screen by expanding the users folder. From there, select the user you'd like to move, **hold** your mouse down to drag and drop the user to the new location. **Release** your mouse when you see the new location highlighted in blue with a small green arrow and the username with a green checkmark

Moving Users



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- HOME
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 - Acme - 70514, Mansfield Weld Shop
 - Acme - 70515, Mansfield

Save User

Username*

First Name*

Last Name*

Company

Job Title

Email*

Confirm Email

Address 1

Address 2

Phone

State / Province

City

Role*

Language*

A screen will open where you can make further adjustments if needed. Click **Save User** to save the customer in their new location.

Save User



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Lube Oil Analysis Management System

- HOME
- SAMPLES
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Details

User Details | Data Access | Joe Smith

First Name: Joe | **Last Name:** Smith

Username: joesmith1@acme.com | **Email:** joesmith1@acme.com

Job Title: | **Company:** Acme

Role: Sampler+Reports

[Reset Password](#)

Once moved, the user will display under the new folder or worksite they were moved to.

Modifying Worksites



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Details

- Users
- Roles
- Customer Settings
- Accounts

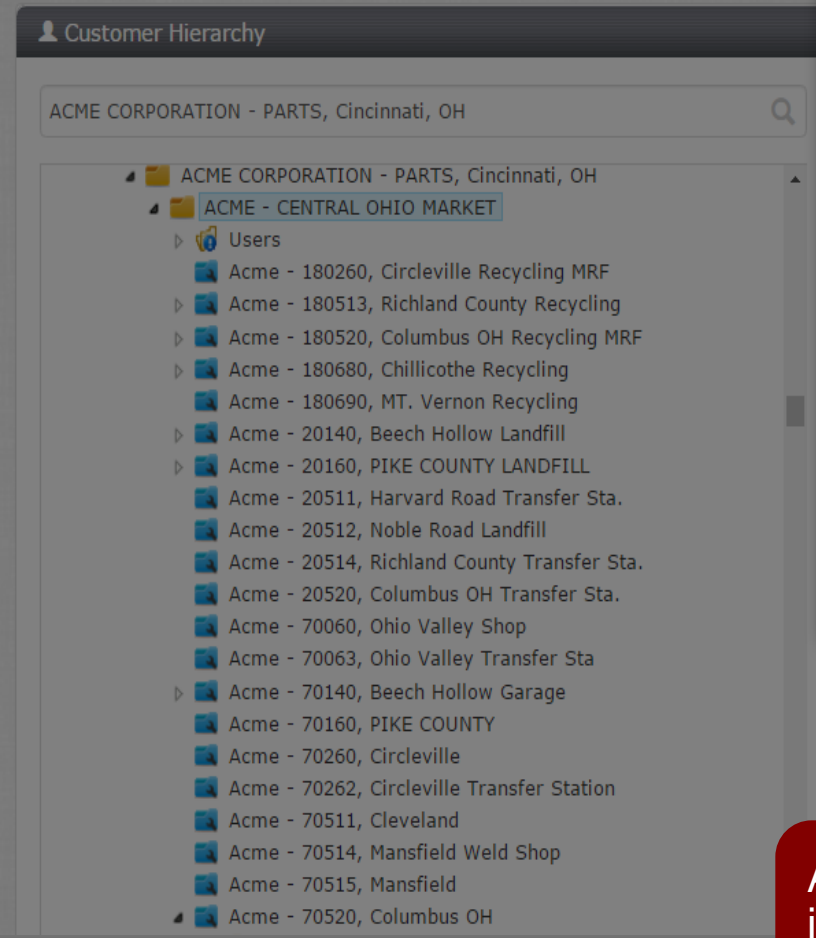
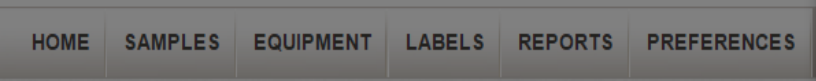
ACME - CENTRAL OHIO MARKET

Modify

| Company | Worksite |
|---------------|-------------------------------|
| Acme - 180260 | Circleville Recycling MRF |
| Acme - 180513 | Richland County Recycling |
| Acme - 180520 | Columbus OH Recycling MRF |
| Acme - 180680 | Chillicothe Recycling |
| Acme - 180690 | MT. Vernon Recycling |
| Acme - 20140 | Beech Hollow Landfill |
| Acme - 20160 | PIKE COUNTY LANDFILL |
| Acme - 20511 | Harvard Road Transfer Sta. |
| Acme - 20512 | Noble Road Landfill |
| Acme - 20514 | Richland County Transfer Sta. |
| Acme - 20520 | Columbus OH Transfer Sta. |
| Acme - 70060 | Ohio Valley Shop |

To modify a worksite, select the **Master** folder on the left. On the right, click on the **Accounts** tab. Select the worksite you want to update by clicking on the **Company Name** (row will highlight gray when you do this) and then click the **Modify** button.

Modifying Worksites



Modify Account

| | | | |
|------------------|--|-------------------------|--|
| Company* | <input type="text" value="Acme - 180260"/> | Worksite | <input type="text" value="Circleville Recycling MRF"/> |
| Address 1 | <input type="text" value="1097 State Route 22 W"/> | Address 2 | <input type="text"/> |
| City | <input type="text" value="Circleville"/> | State / Province | <input type="text" value="OH"/> |
| Zip Code | <input type="text" value="43113"/> | | |

A new window will open up with the current worksite information. Make updates needed and then click on the **Save** button.

Equipment Restrictions



HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

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 - Acme - 70517, Circleville
 - Acme - 70518, Circleville
 - Acme - 70519, Circleville
 - Acme - 70520, Circleville
 - Acme - 70521, Circleville
 - Acme - 70522, Circleville
 - Acme - 70523, Circleville
 - Acme - 70524, Circleville
 - Acme - 70525, Circleville
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 - Acme - 70527, Circleville
 - Acme - 70528, Circleville
 - Acme - 70529, Circleville
 - Acme - 70530, Circleville
 - Acme - 70531, Circleville
 - Acme - 70532, Circleville
 - Acme - 70533, Circleville
 - Acme - 70534, Circleville
 - Acme - 70535, Circleville
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 - Acme - 70538, Circleville
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 - Acme - 70541, Circleville
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Details

Users Roles **Customer Settings** Accounts

ACME - CENTRAL OHIO MARKET

Equipment Restrictions

Industrial & Mobile Industrial Only Mobile Only

The **Customer Settings** tab gives you the ability to apply equipment restrictions to a region or to individual worksites.

- **Industrial & Mobile:** users can add industrial and mobile equipment to their location
- **Industrial Only:** users can add industrial equipment
- **Mobile Only:** users can add mobile equipment

***For more detailed instructions, please view Equipment Quick Start Guide*



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