LOAMS℠

Lube Oil Analysis Management System

Quick Start Guide:
Administrator Advanced

Move Forward with Confidence

BUREAU VERITAS
1828

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:

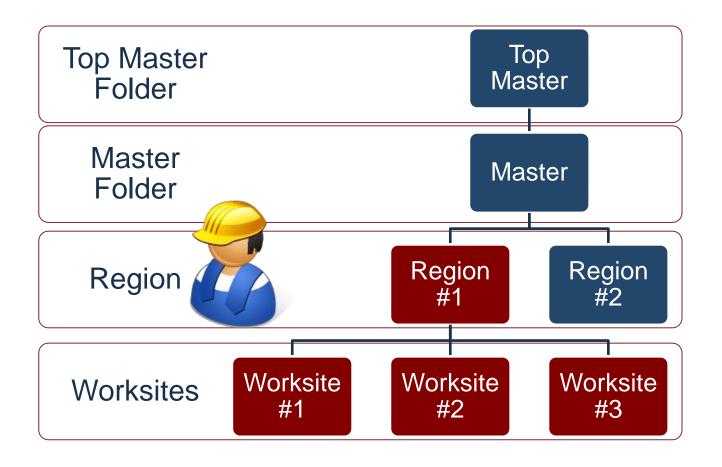| Data Access	Roles (Permission Levels)
• Determines worksites and equipment viewed by user	• Determines what features a user has access to

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.

Top Master Folder	Top Master
Master Folder	Master
Region	Region #1 · Region #2
Worksites	Worksite #1 · Worksite #2 · Worksite #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
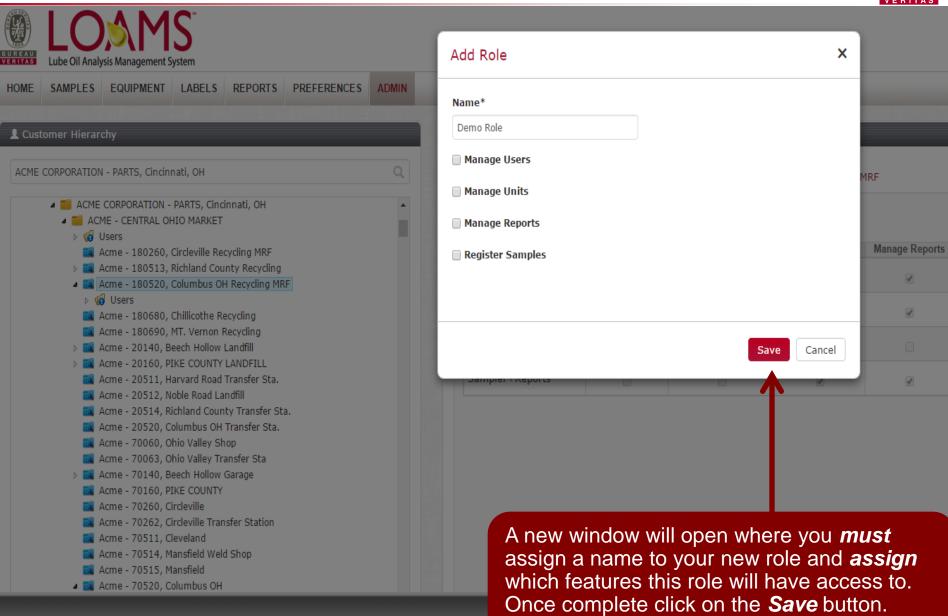- Can Only View Equipment / Print Labels

Creating a Custom Role

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.
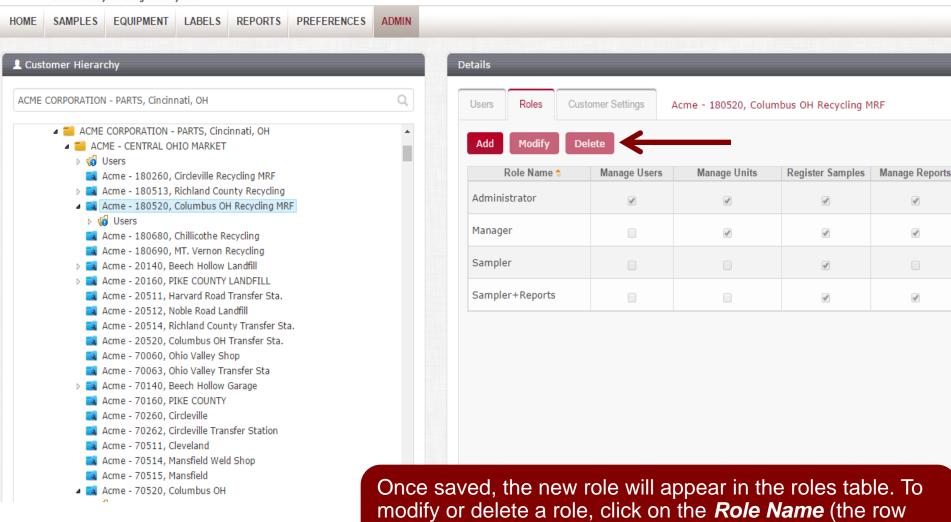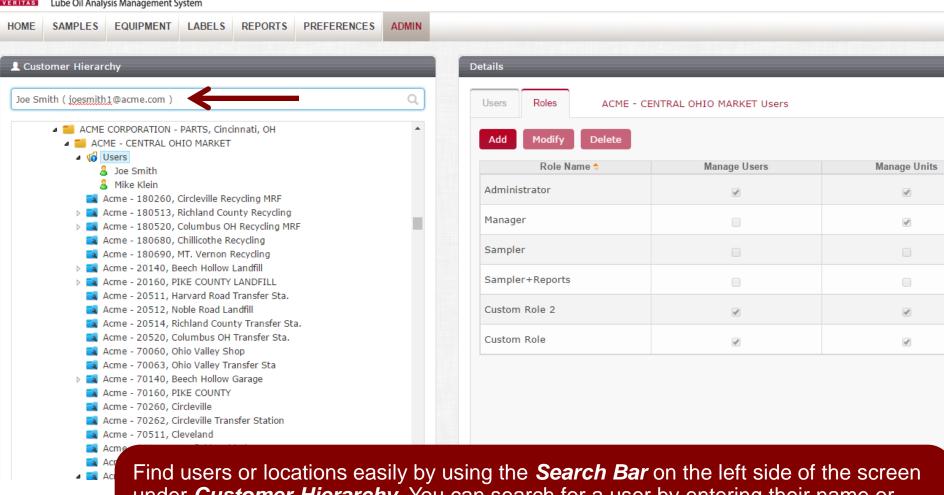
Creating a Custom Role

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

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

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

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

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 *worksite* 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

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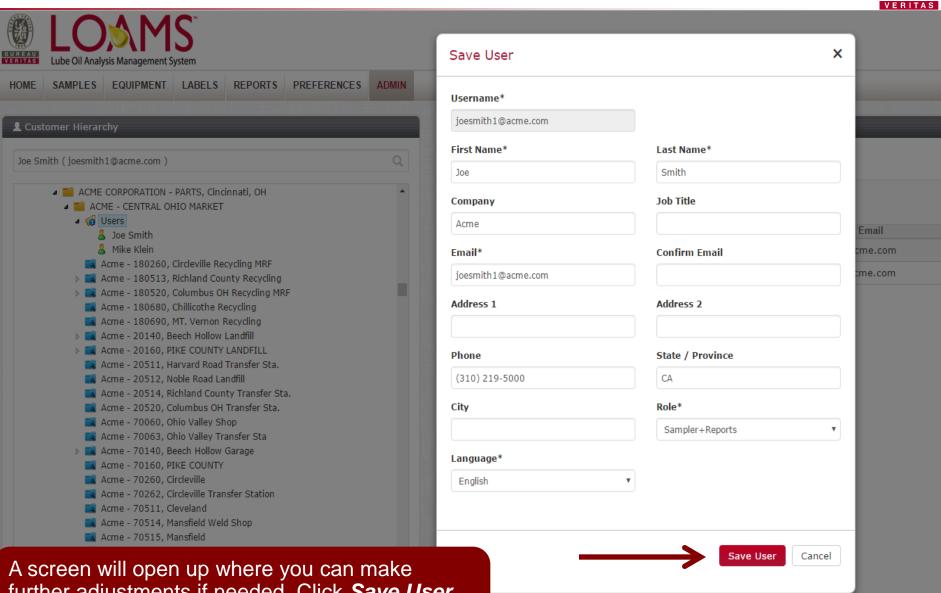
Moving Users

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

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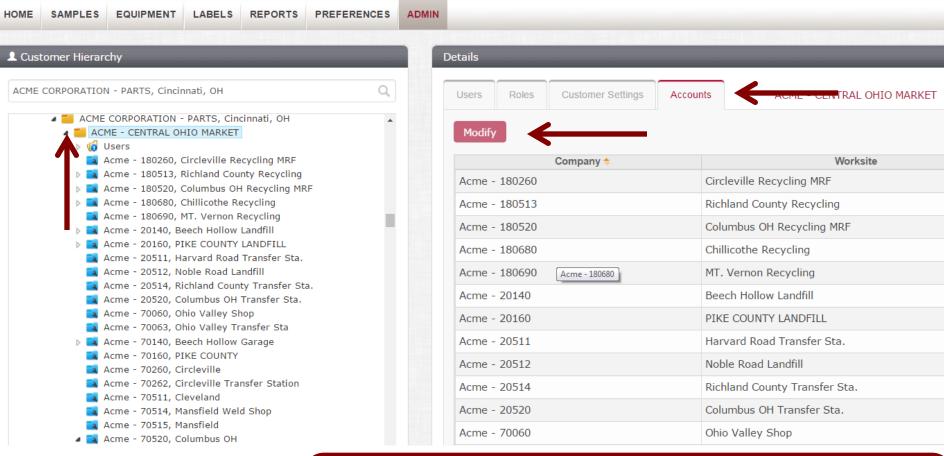
Save User

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

Modifying Worksites

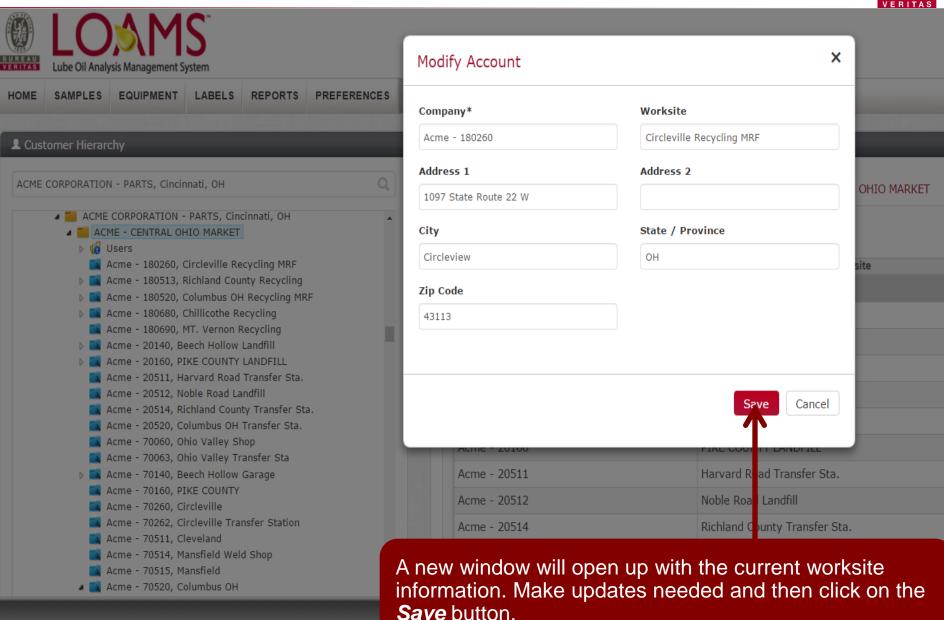To modify a worksite, select the *Master* folder on the left. On the right, click on the *Accounts* tab. Select the worksite you want to update by clicking on the *Company Name* (row will highlight gray when you do this) and then click the *Modify* button.
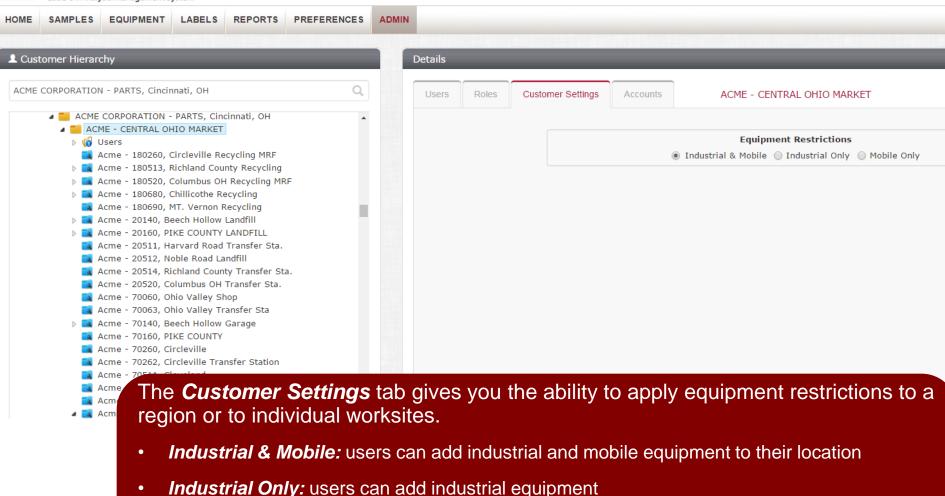
Modifying Worksites

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

Equipment Restrictions

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*

LOAMS® SUPPORT DESK:

Phone: **1-800-655-4473**

Email: **LOAMS@us.bureauveritas.com**

www.AnalystsIncOnline.com

www.AnalystsInc.com/LOAMS-Resource-Center