



# LOAMS<sup>SM</sup>

Lube Oil Analysis Management System

## Quick Start Guide: Administrator Basics



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*Move Forward with Confidence*

# Administrator Basics

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► Learn about:

1. Adding users to the LOAMS system
2. How to modify or delete existing users
3. How to reset passwords

# 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

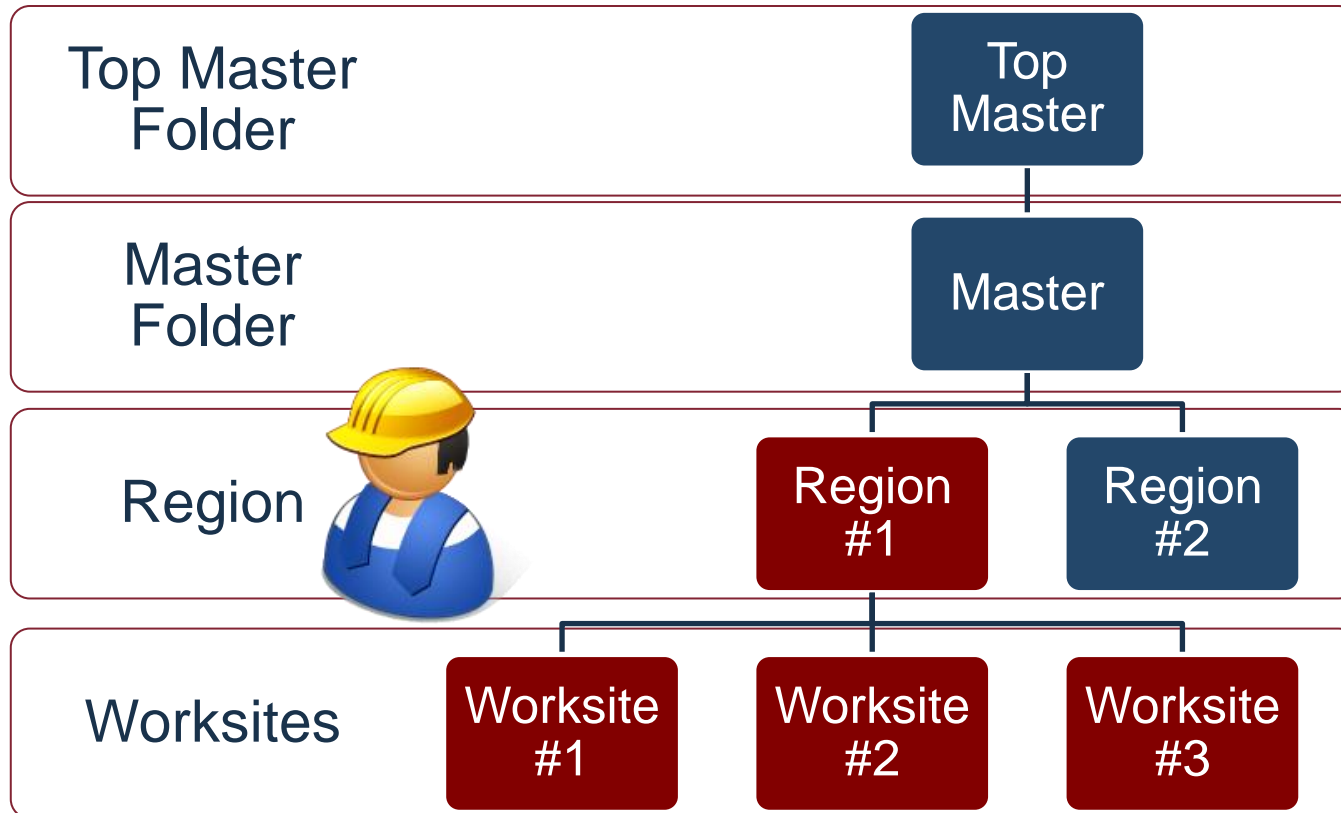
- Determines worksites and equipment viewed by user

## Roles (Permission Levels)

- Determines what features a user has access to

# Data Access Explanation

Below is an example of Data Access, because 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. 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

# Adding New Users



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



## Customer Hierarchy

Search for Users, Company, Site...



- ACME CORPORATION - PARTS, Cincinnati, OH
  - Users
- ACME - CENTRAL OHIO MARKET
  - Users
    - Acme - 180260, Circleville Recycling MRF
    - Acme - 180513, Richland County Recycling
    - Acme - 180520, Columbus OH Recycling MRF
    - Acme - 180680, Chillicothe Recycling
      - Users
    - 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 Ga...
- Acme - 70160, PIKE COUNTY
- Acme - 70260, Circleville
- Acme - 70262, Circleville Tran
- Acme - 70511, Cleveland
- Acme - 70514, Mansfield Welc
- Acme - 70515, Mansfield
- Acme - 70520, Columbus OH

## Details

Users

Roles

Customer Settings

Acme - 180680, Chillicothe Recycling

Add

Modify

Delete

Reset Password

Username	Full Name	Email	Online Role	Company
mikesmith	Mike Smith	mikesmith@acmedemo.com	Manager	Acme - 180680

Use the Admin tab to add new users, manage existing users, create roles, and update worksite information. To start, click on the **Admin** tab.

*\*\*Note if you do not see the admin tab when logged in, you do not have admin privileges. Please contact your company admin or the LOAMS support desk*

# Adding New Users



HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

## Customer Hierarchy

Search for Users, Company, Site...

- ACME CORPORATION - PARTS, Cincinnati, OH
  - Users
- ACME - CENTRAL OHIO MARKET
  - Users
    - Acme - 180260, Circleville Recycling MRF
    - Acme - 180513, Richland County Recycling
    - Acme - 180520, Columbus OH Recycling MRF
    - Acme - 180680, Chillicothe Recycling
      - Users
    - Acme - 180690, N. 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 CO
- Acme - 70260, Circleville
- Acme - 70262, Circleville
- Acme - 70511, Cleveland
- Acme - 70514, Mansfield
- Acme - 70515, Mansfield
- Acme - 70520, Columbus

## Details

Users

Roles

Customer Settings

Acme - 180680, Chillicothe Recycling

Add

Modify

Delete

Reset Password

Username	Full Name	Email	Online Role	Company
mikesmith	Mike Smith	mikesmith@acmedemo.com	Manager	Acme - 180680

To add a new user, select the **worksites** the user needs access to on the left. If a user needs access to multiple locations, they must be added to the folder a level above or a master folder level. Once your selection has been made, click on the **add** button.

**\*\*Note:** You are not able to see users that have the same hierarchy level access as you do.

# Adding New Users



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HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

Customer Hierarchy

@acme

- ACME CORPORATION - PARTS, Cincinnati, OH
  - Users
  - ACME - CENTRAL OHIO MARKET
    - Users
    - Acme - 180260, Circleville Recycling MRF
    - Acme - 180513, Richland County Recycling
    - Acme - 180520, Columbus OH Recycling MRF
    - Acme - 180680, Chillicothe Recycling
      - Users
      - Acme - 180690, MT. Vernon Recycling
    - Acme - 20140, Beech Hollow Landfill
      - Users
    - 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
    - Users
    - Acme - 70160, PIKE COUNTY
    - Acme - 70260, Circleville

## Add New User

Username\*

bobsmith

First Name\*

Bob

Last Name\*

Smith

Company

Acme - 180680

Job Title

Email\*

bobsmith@acme.com

Confirm Email \*

bobsmith@acme.com

Address 1

Phone

( ) -

City

Language\*

English

Address 2

State / Province

Role\*

Sampler+Reports

Add New User

Cancel

Complete all the required fields highlighted in yellow. You **must** assign a role to the new user. Click **Add New User** to complete registration. Once saved, users instantly receive an email with their username, password, and login instructions.



# Modifying Users



HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

Customer Hierarchy

@acme

- ACME CORPORATION - PARTS, Cincinnati, OH
  - Users
- ACME - CENTRAL OHIO MARKET
  - Users
  - Acme - 180260, Circleville Recycling MRF
  - Acme - 180513, Richland County Recycling
  - Acme - 180520, Columbus OH Recycling MRF
  - Acme - 180680, Chillicothe Recycling
    - Users
  - Acme - 180690, MT. Vernon Recycling
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    - Users
  - Acme - 20160, PIKE COUNTY LANDFILL
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  - Acme - 70140, Beech Hollow Garage
    - Users
  - 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 - 180680, Chillicothe Recycling

Add Modify Delete Reset Password

Username	Full Name	Email	Online Role	Company
bobsmith	Bob Smith	bobsmith@acme.com	Sampler+Reports	Acme - 180680
mikesmith	Mike Smith	mikesmith@acmedemo.com	Manager	Acme - 180680

Select the user's **worksite** on the left to modify, delete, or reset their password. On the right, select the user and then select modify, delete, or reset password.

# User Details



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Lube Oil Analysis Management System

Select Language English

LOAMS Admin ▾ Last login on 12/28/2017

HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

Quick Search

Need Help ?

## Customer Hierarchy

Bob Smith ( bobsmith / bobsmith@acme.com )

- ACME CORPORATION - PARTS, Cincinnati, OH
  - Users
    - ACME - CENTRAL OHIO MARKET
      - Users
        - Acme - 180260, Circleville Recycling MRF
        - Acme - 180513, Richland County Recycling
        - Acme - 180520, Columbus OH Recycling MRF
        - Acme - 180680, Chillicothe Recycling
          - Users
            - Bob Smith
            - Mike Smith
        - 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
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      - 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

## Details

User Details ←

Bob Smith

First Name: Bob

Last Name: Smith

Username: bobsmith

Email: bobsmith@acme.com

Job Title:

Company: Acme - 180680

Role: Sampler+Reports

Reset Password ↑

Expand the users folder on the left to view all users listed under a worksite. On the right, the **User Details** tab shows you user information and an option to reset their password.

# Data Access



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Lube Oil Analysis Management System

Select Language English

LOAMS Admin ▾ Last login on 12/28/2017

HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

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        - Acme - 180680, Chillicothe Recycling
          - Users
            - Bob Smith
            - Mike Smith
          - Acme - 180690, MT. Vernon Recycling
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        - 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

User Details

Data Access

Bob Smith

Select All - Select None

Acme - 180680, Chillicothe Recycling

The **Data Access** tab allows you to modify which worksite a user views. If the checkbox is selected next to a location, the user can view the worksite online.



**LOAMS<sup>®</sup> SUPPORT DESK:**

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**[www.AnalystsInc.com/LOAMS-Resource-Center](http://www.AnalystsInc.com/LOAMS-Resource-Center)**