

# Quick Start Guide

## Administrator Basics

# 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

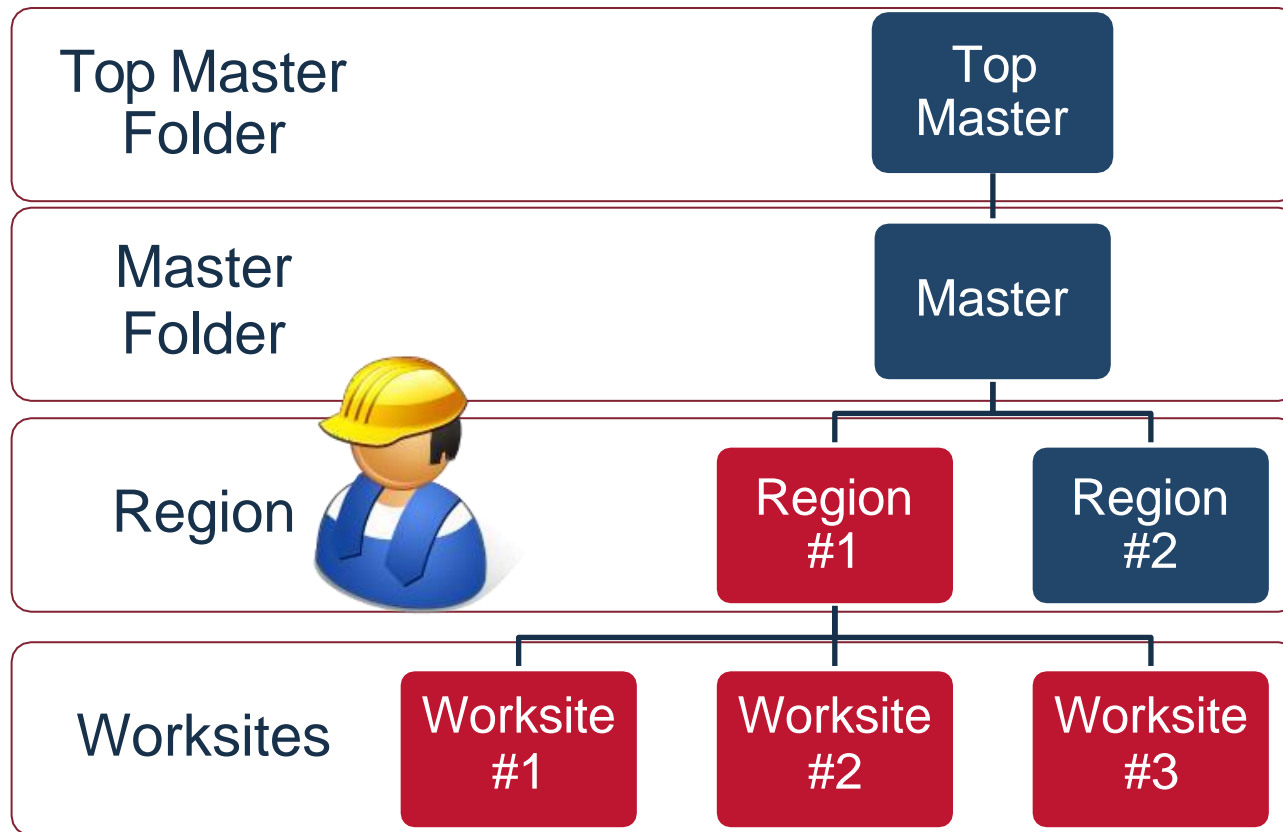
## Roles

### (Permission Levels)

- Determines what features a user has access to

# Data Access Explanation

Below is an example of Data Access: 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. 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

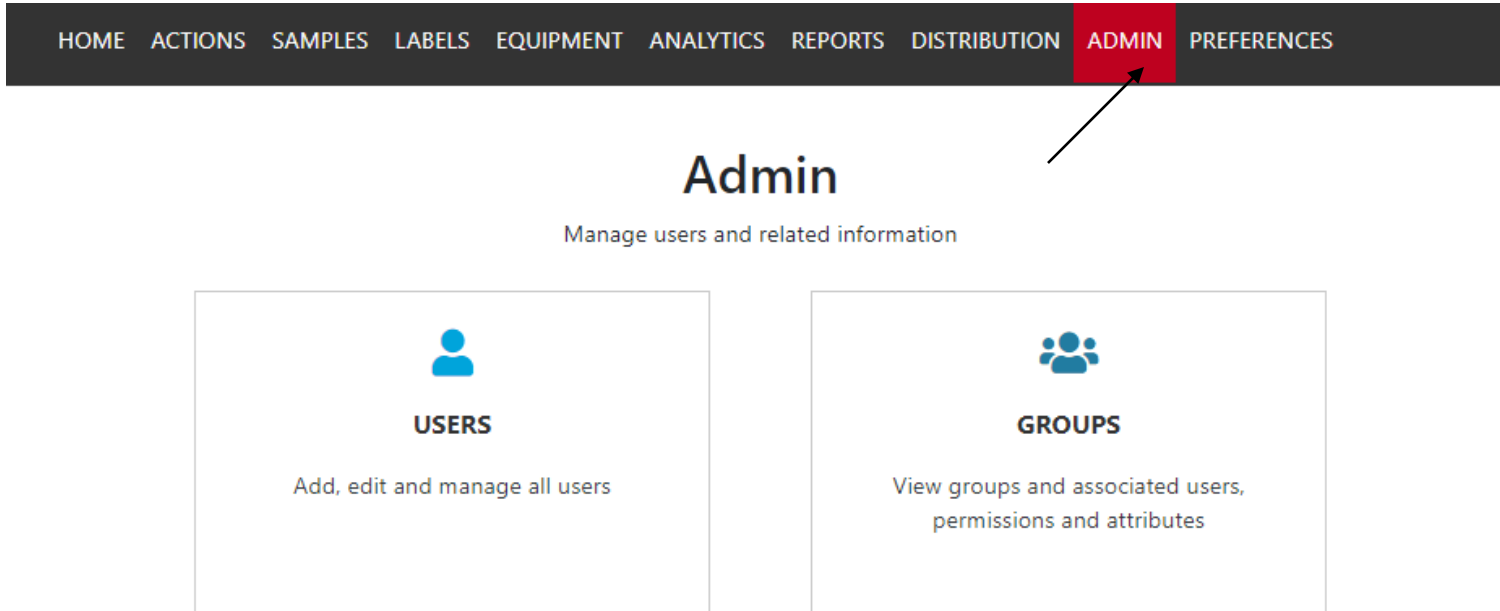
- Can Only View Equipment / Print Labels
- Run Management Reports



## Sampler

- Can Only View Equipment / Print Labels

# Adding New Users



The screenshot shows a dark navigation bar at the top with the following tabs: HOME, ACTIONS, SAMPLES, LABELS, EQUIPMENT, ANALYTICS, REPORTS, DISTRIBUTION, ADMIN (highlighted in red with an arrow pointing to it), and PREFERENCES. Below the navigation bar, the main content area is titled "Admin" with the subtitle "Manage users and related information". There are two main modules displayed: "USERS" with a description "Add, edit and manage all users" and "GROUPS" with a description "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. Then, click on the **Users** module. You can add new user accounts in the **Users** and **Groups** module.

*\*\*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



LOAMS  
Lube Oil Analysis Management System

Need Help ?

Search

quickstart dem

HOME ACTIONS SAMPLES LABELS EQUIPMENT ANALYTICS REPORTS DISTRIBUTION ADMIN PREFERENCES

All Users

Admin / Users

+ Add Filter

+ NEW USER

FULL NAME	EMAIL	COMPANY	ROLE	USER NAME	USER STATUS	LAST LOGIN
Jane Doe	janedoe@abc.com		Manager	janedoe	Active	
Jim Doe	jimdoe@12345.com		Sampler + Reports	jimdoe	Active	
John Doe	johndoe@bureauveritas.com		Administrator	quickstartdemo	Active	04/12/2023

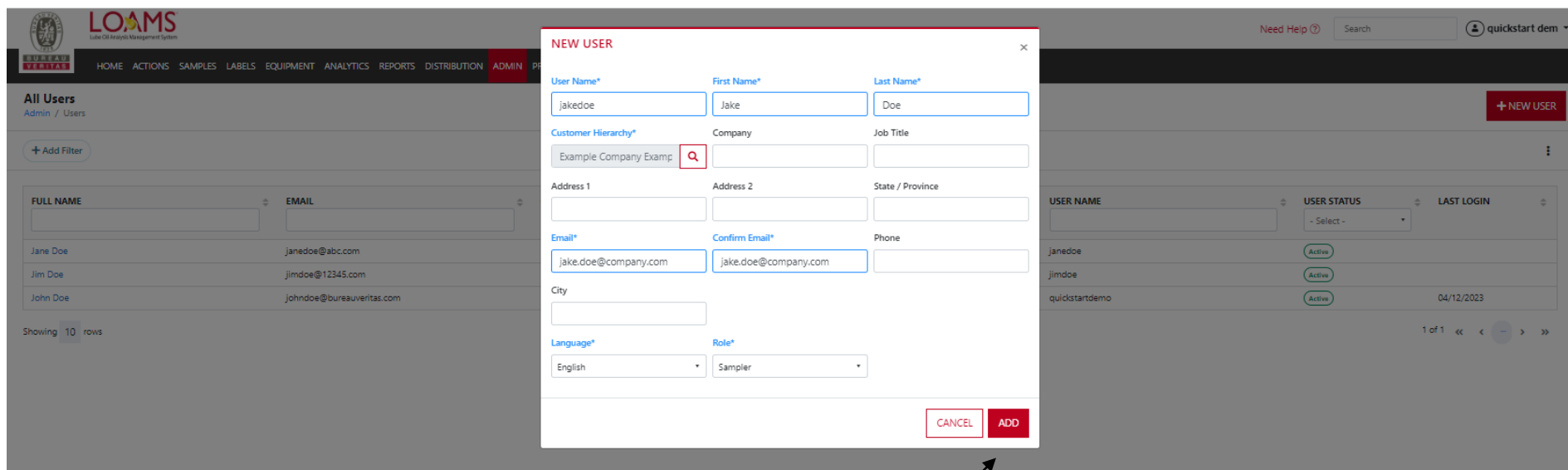
Showing 10 rows

1 of 1 << >>

To add a new user, select the red “+ New User” icon. Here you will be prompted to enter user information including their username, first and last name, location access level, email, language and role. Once you have entered that information, select the red “Add” icon.

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

# Adding New Users



The screenshot shows the LOAMS interface with a 'NEW USER' modal form open. The background shows the 'All Users' page with a table of existing users and a '+ NEW USER' button. The modal form contains the following fields:

- User Name\* (jakedoe)
- First Name\* (Jake)
- Last Name\* (Doe)
- Customer Hierarchy\* (Example Company Examp)
- Company
- Job Title
- Address 1
- Address 2
- State / Province
- Email\* (jake.doe@company.com)
- Confirm Email\* (jake.doe@company.com)
- Phone
- City
- Language\* (English)
- Role\* (Sampler)

Required fields are highlighted in blue. The form has 'CANCEL' and 'ADD' buttons at the bottom right. An arrow points from the 'ADD' button to the text below.

To add a new user, select the red “+New User” icon. Here you will be prompted to enter user information including their username, first and last name, location access level, email, language and role. Once you have entered that information, select the red “Add” icon.

Complete all the required fields that are highlighted in blue. You **must** assign a role to the new user. Once saved, users instantly receive an email with their username, password, and login instructions.



# Modifying Users



BUREAU  
VERITAS



Need Help ?

Search

John Doe

HOME ACTIONS SAMPLES LABELS EQUIPMENT ANALYTICS REPORTS DISTRIBUTION ADMIN PREFERENCES

## All Users

Admin / Users

+ NEW USER

+ Add Filter

FULL NAME	EMAIL	COMPANY	ROLE	USER NAME	USER STATUS	LAST LOGIN
Jane Doe	janedoe@abc.com		Manager	janedoe	Active	
Jim Doe	jimdoe@12345.com		Sampler + Reports	jimdoe	Active	
John Doe	johndoe@bureauveritas.com		Administrator	quickstartdemo	Active	04/12/2023

Showing 10 rows

1 of 1

## User Details for Jim Doe

Admin / Users / Jim Doe

← BACK



Jim Doe

jimdoe@12345.com

Last sign in: Never

Created On: April 12, 2023

Change Password

Reset Password

### User Details

Permissions

Attributes

Groups

Edit details below for Jim Doe

SAVE DETAILS

User Name\*

jimdoe

First Name\*

Jim

Last Name\*

Doe

Email\*

jimdoe@12345.com

Company

Job Title

Phone

Address 1

Address 2

City

State / Province

Reference

Language\*

English

Role\*

Sampler + Reports

User Status

Active

Select the blue hyperlink under the user's "Full Name" to edit their account. Once the account is selected, you can change or reset their password.

# Modifying Users


## User Details for Jim Doe


Admin / Users / Jim Doe

← BACK

 Jim Doe  
jimdoe@12345.com

Last sign in: Never  
Created On: April 12, 2023

 Change Password

 Reset Password

User Details | Permissions | Attributes | **Groups**

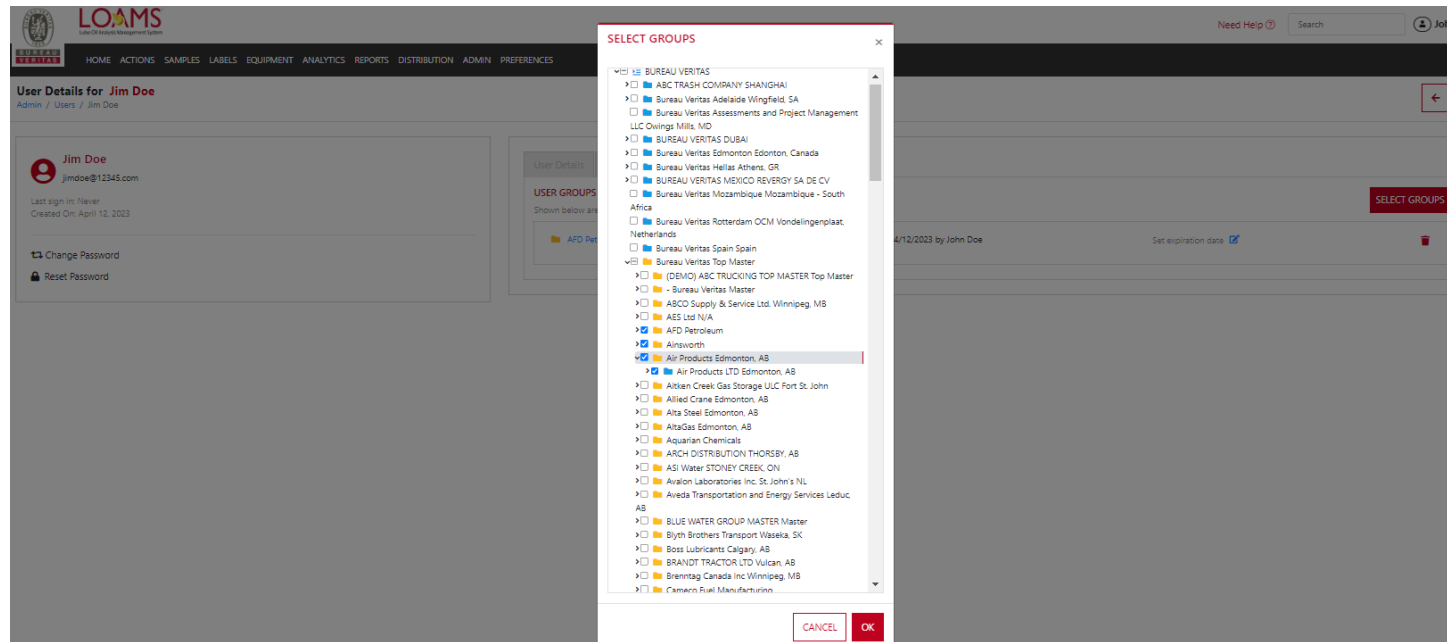
### USER GROUPS

Shown below are all the groups for Jim Doe

 AFD Petroleum	Added on 04/12/2023 by John Doe	Set expiration date 	
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**SELECT GROUPS**

You can add multiple worksites to a user's account by selecting the *Groups* tab. The equipment tree will open once you click on the *Select Groups* icon. From there, you can select and un-select different customers to change their access. Make sure to click *OK* to save any changes.



The screenshot shows the LOAMS User Management System interface. The 'User Details for Jim Doe' page is visible, with the 'Groups' tab selected. A 'SELECT GROUPS' dialog box is open, displaying a tree view of available groups. The tree view includes 'BUREAU VERITAS' and various regional offices and departments. The 'AFD Petroleum' group is highlighted in the tree view. The dialog box has 'CANCEL' and 'OK' buttons at the bottom.

# Modifying Users

## Admin

Manage users and related information



### USERS

Add, edit and manage all users



### GROUPS

View groups and associated users, permissions and attributes



### SPEC LIMIT SETS

spec limit sets description



## Group Hierarchy

Admin / Groups

Search hierarchy...

- [-] BUREAU VERITAS
  - [+] ABC TRASH COMPANY SHANGHAI
  - [+] Bureau Veritas Adelaide Wingfield, SA
  - [+] Bureau Veritas Assessments and Project Management LLC Owings Mills, MD
  - [+] BUREAU VERITAS DUBAI
  - [+] Bureau Veritas Edmonton Edmonton, Canada
  - [+] Bureau Veritas Hellas Athens, GR
  - [+] BUREAU VERITAS MEXICO REVERGY SA DE CV
    - [+] Bureau Veritas Mozambique Mozambique - South Africa
    - [+] Bureau Veritas Rotterdam OCM Vondelingenplaat, Netherlands
    - [+] Bureau Veritas Spain Spain
  - [+] Bureau Veritas Top Master
    - [+] (DEMO) ABC TRUCKING TOP MASTER Top Master
      - [+] ABC TRUCKING MASTER Master
      - [+] - Bureau Veritas Master
      - [+] ABCO Supply & Service Ltd. Winnipeg, MB
      - [+] AES Ltd N/A
      - [+] AFD Petroleum
      - [+] Alinsworth
      - [+] Air Products Edmonton, AB
        - [+] Air Products LTD Edmonton, AB
        - [+] Aitken Creek Gas Storage ULC Fort St. John
        - [+] Allied Crane Edmonton, AB
        - [+] Alta Steel Edmonton, AB
        - [+] Alkermis Edmonton, AB

Users



Access to other users at this level is restricted



You can also search, edit and add users from the Groups module. This will open up the equipment tree.

As a note, you can only add users under your data access and cannot add users at the same data level as you.

# LOAMS<sup>SM</sup>

Lube Oil Analysis Management System

**LOAMS<sup>®</sup> SUPPORT DESK:**

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

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






[www.AnalystsIncOnline.com](http://www.AnalystsIncOnline.com)

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

# LOAMS - The Lube Oil Analysis Management System



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)

