



Labcheck Next Generation

# Quick Start Guide

## Filters



## What are Filters?

- Filters are a set of specific saved search criteria (called “Properties”) that allow users to narrow down what information displays throughout the different tabs of the Labcheck System. Based on which filter conditions are applied, data will display accordingly.
- Filters are designed to save time when searching for Sample Reports and Equipment or when creating Labels or Management Reports.
- Filters also are applicable to the new “Distribution” feature, see the *“Labcheck Quick Start Guide: Distribution Basics”* for more information.
- Filters are applicable the Samples, Equipment, Labels, and Reports tabs.

# Accessing Filters

## User Preferences

**Filters**

Communications

My Tests

General

### Manage Filters

Filter Name

Combine conditions with

AND

	Property	Type	Value

[New Filter](#)

[Delete Filter](#)

[Copy Filter](#)

[Delete Condition](#)

[New Condition](#)

[Save](#)

[Clear](#)

Select the **“Filters”** tab to view Filters

To access your filters click on the **“Preferences”** tab

# Setting-up Filters

## User Preferences

[Filters](#) [Communications](#) [My Tests](#) [General](#)

### Manage Filters

My Filters

Filter Name

Combine conditions with

	Property	Type	Value
<input type="checkbox"/>	City	Equals	

[Delete Condition](#)

[New Condition](#)

[Save](#)

[Clear](#)

[New Filter](#)

[Delete Filter](#)

[Copy Filter](#)

**Step 1:**  
Click on the  
“New Filter”  
button

A new condition will  
appear in the table.  
Multiple conditions can  
be created for a filter

# Select Property

## User Preferences

[Filters](#) [Communications](#) [My Tests](#) [General](#)

### Manage Filters

My Filters

Filter Name

Combine conditions with

	Property	Type	Value
<input type="checkbox"/>	City	Equals	
<input type="checkbox"/>	Component Reference No.		
<input type="checkbox"/>	Condition		
<input type="checkbox"/>	Customer		
<input type="checkbox"/>	Customer List		
<input type="checkbox"/>	Equipment Type		
<input type="checkbox"/>	Oil Brand		
<input type="checkbox"/>	Oil Grade		
<input type="checkbox"/>	Oil Manufacturer		
<input type="checkbox"/>	Sample Date Range		
<input type="checkbox"/>	Sample Number		
<input type="checkbox"/>	Severity		
<input type="checkbox"/>	State		
<input type="checkbox"/>	Submitted Status		
<input type="checkbox"/>	Submitted Tracking Number		
<input type="checkbox"/>	Unit ID		
<input type="checkbox"/>	Unit Make		
<input type="checkbox"/>	Unit Model		
<input type="checkbox"/>	Unit Worksite		
<input type="checkbox"/>	Worksite		
<input type="checkbox"/>	Zip Code		

### Step 2:

Select your Property value from the drop down list. Properties are the item that you which to search for. (Ex: Unit ID, Unit Make, Unit Model)

[New Filter](#)

[Delete Filter](#)

[Copy Filter](#)

[Add Condition](#)

[Save](#)

[Clear](#)

# Select Type



## User Preferences

[Filters](#) [Communications](#) [My Tests](#) [General](#)

### Manage Filters

My Filters

Filter Name

Combine conditions with

	Property	Type	Value
<input type="checkbox"/>	Unit ID	Equals	<input type="text"/>
		Contains	
		Contains Comma Separated	
		Equals	
		Equals Comma Separated	
		Not Equals	
		Not Equals Comma Separated	
		Starts With	
		Starts With Comma Separated	

[New Filter](#)

[Delete Filter](#)

[Delete Condition](#)

[New Condition](#)

[Save](#)

[Clear](#)

[Copy Filter](#)

### Step 3:

Select your Type from the drop down list. Type means how you want the filter search to display (ex. Starts with will match the character entered in the value field verbatim)

# Insert Value



## User Preferences

[Filters](#) [Communications](#) [My Tests](#) [General](#)

### Manage Filters

My Filters

Filter Name

Combine conditions with

	Property	Type	Value
<input type="checkbox"/>	Unit ID	Starts With	1

Delete Condition

New Condition

Save

Clear

### Step 4:

Insert a value. The value field should be filled out based on what property you selected. In this example, because Unit ID is the property, and the type is Starts With this filter will pull up all Unit IDs that start with 1

# Adding Conditions

## User Preferences

[Filters](#)

[Communications](#)

[My Tests](#)

[General](#)

### Manage Filters

Filter Name

Combine conditions with

	Property	Type	Value
<input type="checkbox"/>	Unit ID	Starts With	1
<input type="checkbox"/>	Severity		A <input type="checkbox"/> B <input type="checkbox"/> C <input checked="" type="checkbox"/> D <input checked="" type="checkbox"/>

[New Filter](#)

[Delete Filter](#)

[Copy Filter](#)

[Delete Condition](#)

[New Condition](#)

[Save](#)

[Clear](#)

For more refined results, you can add new conditions to filters. To do this click on the “**New Condition**” button and follow the previous steps provided



# Saving Filters

## User Preferences

[Filters](#) [Communications](#) [My Tests](#) [General](#)

To save a filter enter a Filter Name

### Manage Filters

My Filters

Filter Name

Combine conditions with

[New Filter](#)

[Delete Filter](#)

[Copy Filter](#)

	Property	Type	Value
<input type="checkbox"/>	Unit ID	Starts With	1
<input type="checkbox"/>	Severity		A <input type="checkbox"/> B <input type="checkbox"/> C <input checked="" type="checkbox"/> D <input checked="" type="checkbox"/>

[New Condition](#)

[Save](#)

[Clear](#)

Once a Filter Name has been entered the Save button will become active. Click "**Save**" to save your filter and it will now display in the My Filters box

# Filter Properties

Filter “Properties” are the data fields in which you choose to apply your filter to (le Unit ID, Unit Make, Unit Model, etc.) Depending on which tab you are in, the applicable filter properties are applied.

*The table below explains which properties are applicable on each tab:*

<b>Samples</b>	<b>Equipment</b>	<b>Labels</b>	<b>Reports</b>
<ul style="list-style-type: none"><li>• Customer Name</li><li>• Customer Worksite</li><li>• City / State / Zip</li><li>• Unit ID</li><li>• Unit Worksite</li><li>• Unit Make</li><li>• Unit Model</li><li>• Component Type</li><li>• Component Make</li><li>• Component Model</li><li>• Component Reference Number</li><li>• Sample Condition</li><li>• Oil Manufacturer</li><li>• Oil Brand</li><li>• Oil Grade</li></ul>	<ul style="list-style-type: none"><li>• Customer Worksite</li><li>• Unit ID</li><li>• Unit Manufacturer</li><li>• Unit Model</li><li>• Component</li></ul>	<ul style="list-style-type: none"><li>• Component</li><li>• Unit ID</li><li>• Customer Worksite</li><li>• Tracking Number</li><li>• Status</li></ul>	<ul style="list-style-type: none"><li>• Customer Worksite</li><li>• Date Range</li></ul>

# Filter Types

Filter “Type” determines how the property selected is filtered. Explanations of each filter type are shown in the table below:

## Contains

- Will only display results that contain the value inputted for the given property

## Equals

- Will only display results that match the exact value inputted for the given property

## Not Equals

- Will only display results that do not match the exact value inputted for the given property

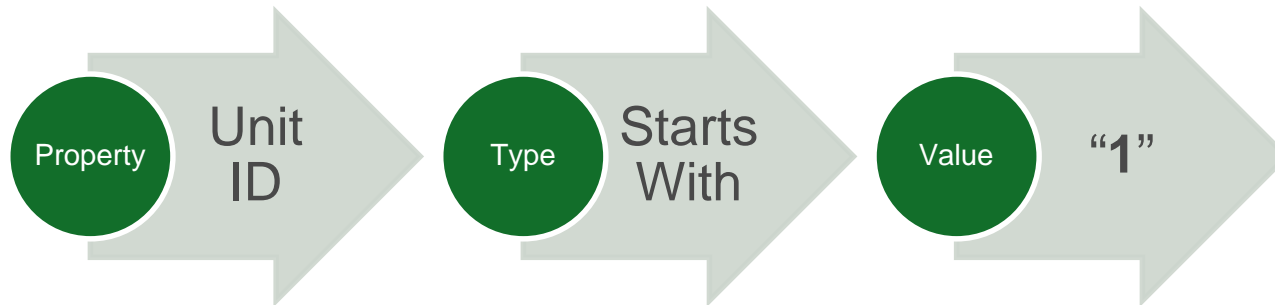
## Starts With

- Will only display results that begin with the value inputted for the given property

Note: Filter types that end with “Comma Separated”, allow users to input multiple values for a given property by using a comma to separate each value.

# Filter Value

The Value field should be filled out based on what Property & Type are selected. For example if you are searching for a specific unit but only know the first character of the Unit ID, you would select Unit ID as the property. In the type field you would choose “Starts With” and in the value field you would insert the first character of the Unit ID. Screenshots of this example are included in previous slides.



This filter would then produce results containing all Unit ID's that start with the number 1.