



Labcheck Next Generation

Quick Start Guide

Filters Advanced

Learn How To:

1. Use Filters and Their Functionality
2. How to create a filter using Samples, Equipment & Labels Tabs
3. How to Modify/Delete Filters

Filters Explanation

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 LOAMS 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 are applicable to the Samples, Equipment, Labels, & Reports tabs

Filters also are applicable to the new “Distribution” feature, see the “*Quick Start Guide: Distribution Basics*” for more information

Filters Properties

Filter “Properties” are the data fields in which you choose to apply your filter to (Ex: 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:

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

Filters 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 input for the given property

Equals

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

Not Equals

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

Starts With

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

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

Accessing Filters through the Samples Tab

Inbox Search

Quick Search

Quick filter here...



Export XLS



Print Report(s)

Filters

▾ + ✎

+ Advanced Search

Date Range ⓘ

☒ All Samples

☐ Only Samples in Reviewed Date Range

Earliest:

Latest:

Severity

☒ A ☒ B ☒ C ☒ D

Customer

Name

Worksite

State

Zip Code

City

Unit

ID

Worksite

Make

Unit Model

Component

Component Type



Manufacturer

Sample

Condition

Oil Manufacturer

To create a filter through advanced searching fill out one or more of the property options. Once properties are filled out click on **Submit Search Criteria**

Submit Search Criteria

Reset Form

Accessing Filters through the Samples Tab

The screenshot shows the Castrol LABCHECK interface. A modal dialog titled "Add Filter" is open, prompting the user to "Save current search as a new filter". The dialog contains a text input field with the text "Demo Engine Filter" and two buttons: "Save" (green) and "Cancel" (white). Below the dialog, the "Filters" section is visible, featuring a search bar and a table of test results. The table has columns for Severity, Sample ID, Sample Date, Receiver, Unit ID, Unit Model, Unit Manufacturer, Component, Component Description, Component Status, and Custom Notes. The first three rows of the table are visible, each starting with a green 'A' in the Severity column. A red callout box at the bottom right contains the text: "Click on the + button next to Filters to create a new filter. A new window will open, enter a name for your filter and click **Save**".

Castrol LABCHECK
NEXT GENERATION

English

last login on 12/19/2014

HOME

Inbox Search

Quick Search

Quick filter here...

Add Filter

Save current search as a new filter

Demo Engine Filter

Save Cancel

Filters

+ Advanced Search

Severity	Sampl...	Sampl...	Receiv...	Unit ID	Unit M...	Unit M...	Compo...	Compo...	Compo...	Cust...
A	201412...	Nov 10,...	Dec 08,...	92-103	CX135	Case	ENGINE	Unknow...	-	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.										
A	201412...	Nov 29,...	Dec 08,...	92-112	-	-	ENGINE	Unknow...	-	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.										
A	201412...	Dec 01,...	Dec 08,...	92-...	-	-	ENGINE	Unknow...	-	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.										
A	201412...	Dec 05,...	Dec 08,...	51...	-	-	ENGINE	Unknow...	-	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.										
A	201412...	Dec 01,...	Dec 08,...	18...	-	-	ENGINE	Unknow...	-	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.										
A	201412...	Nov 10,...	Dec 08,...	92-106	308	Caterpill...	ENGINE	Unknow...	-	AFOLINO

Click on the + button next to Filters to create a new filter. A new window will open, enter a name for your filter and click **Save**

Accessing Filters through the Samples Tab



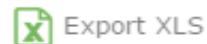
Inbox

Search

Quick Search

Quick filter 


+ Advanced Search



Filters

- Select Filter --
- Demo Engine Filter**
- Demo Filter 1

<input type="checkbox"/>	Severity	Sample...	Sample...	Receive...	Unit ID	Unit Mo...	Unit Ma...	Compo...	Compo.	Comer	
<input type="checkbox"/>	A	2014120...	Nov 10, ...	Dec 08, ...	92-103	CX135	Case	ENGINE	Unknow...	-	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.											
<input type="checkbox"/>	A	2014120...	Nov 29, ...	Dec 08, ...	92-112	-	-	ENGINE	Unknow...	-	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.											
<input type="checkbox"/>	A	2014120...	Dec 01, ...	Dec 08, ...	92-110	C-308	Caterpillar	ENGINE	Caterpillar	C-308	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.											
<input type="checkbox"/>	A	2014120...	Dec 05, ...	Dec 08, ...	51-113	5100-2	Vogele	ENGINE	Unknow...	-	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.											
<input type="checkbox"/>	A	2014120...	Dec 01, ...	Dec 08, ...	18-308						
Test results are acceptable. No corrective action indicated. Resample at normal interval.											
<input type="checkbox"/>	A	2014120...	Nov 10, ...	Dec 08, ...	92-103						
Test results are acceptable. No corrective action indicated. Resample at normal interval.											
<input type="checkbox"/>	B	2014120...	Nov 13, ...	Dec 08, ...	61-113						
Fuel dilution contamination could be caused by defective injectors, system leaks and or abnormal operating conditions. Check for											

To use a saved filter, **select** from the drop down list under Filters. Once selected, search results will automatically display

Accessing Filters through the Equipment Tab



Select Language English ▾

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HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS

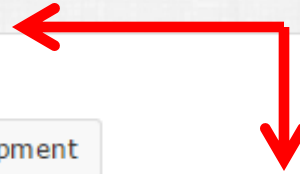
Quick Search

Explore

Find Units

BROWSE TREE

FIND UNITS



Clear



Print Labels



Download Equipment

Filters



<input type="checkbox"/> Customer	Worksite	Unit ID	Unit Manufacturer	Unit Model	Component
<input type="text" value="Filter..."/>	<input type="text" value="Filter..."/>	<input type="text" value="Filter..."/>	<input type="text" value="Filter..."/>	<input type="text" value="Filter..."/>	<input type="text" value="hydraulic"/>
<input type="checkbox"/> American Paving C...	SHOP	4055	Gehl Co.	4840	HYDRAULIC
<input type="checkbox"/> Abel Construction ...	YORK PA	963C-3	Caterpillar	963C	HYDRAULIC
<input type="checkbox"/> Abel Construction ...	YORK PA	DRILL 7			HYDRAULIC
<input type="checkbox"/> American Paving C...	SHOP	E-29	DEERE	330CLC	HYDRAULIC
<input type="checkbox"/> Abel Construction ...	MOUNTVILLE, PA	310SG-7	DEERE	310SG	HYDRAULIC
<input type="checkbox"/> American Paving C...	SHOP	TAKEUCHI	Takeuchi	TL120	HYDRAULIC
<input type="checkbox"/> American Paving C...	SHOP	4007	Komatsu	WA320-3ML	HYDRAULIC
<input type="checkbox"/> Abel Construction ...	YORK PA	338...			HYDRAULIC
<input type="checkbox"/> Abel Construction ...	MOUNTVILLE, PA				HYDRAULIC
<input type="checkbox"/> Abel Construction ...	YORK PA				HYDRAULIC
<input type="checkbox"/> Abel Construction ...	MOUNTVILLE, PA				HYDRAULIC
<input type="checkbox"/> American Paving C...	SHOP				HYDRAULIC
<input type="checkbox"/> American Paving C...	SHOP				HYDRAULIC

To create a filter under Equipment click on the **Find Units** tab. From here you can run a search using the five properties located at the top. Once you have your search criteria filled out your results will display below

Accessing Filters through the Equipment Tab

Castrol
LABCHECK
NEXT GENERATION

HOME | SAM

Explore | Find Units

Clear | + |

Select Language English
Last login on 12/19/2014

Quick Search ?

Add Filter

Save current search as a new filter

Demo Hydraulic Filter

Save Cancel

Customer	Filter...	Filter...	Filter...	Filter...	Filter...	Component
<input type="checkbox"/> American Paving C...	SHOP	4055	Gehl Co.	4840		HYDRAULIC
<input type="checkbox"/> Abel Construction ...	YORK PA	963C-3	Caterpillar	963C		HYDRAULIC
<input type="checkbox"/> Abel Construction ...	YORK PA	DRILL 7				HYDRAULIC
<input type="checkbox"/> American Paving C...	SHOP	E-29	DEERE	336CLC		HYDRAULIC
<input type="checkbox"/> Abel Construction ...	MOUNTVILLE, PA	310SG-7	DEERE	310SG		HYDRAULIC
<input type="checkbox"/> American Paving C...	SHOP	TAKEUCHI	Takeuchi	TL120		HYDRAULIC
<input type="checkbox"/> American Paving C...	SHOP	4007	Komatsu	WA320-3ML		HYDRAULIC
<input type="checkbox"/> Abel Construction ...	YORK PA	330CL-1				HYDRAULIC
<input type="checkbox"/> Abel Construction ...	MOUNTVILLE, PA	7501	DEERE	7501		HYDRAULIC
<input type="checkbox"/> Abel Construction ...	YORK PA					
<input type="checkbox"/> Abel Construction ...	MOUNTVILLE,					
<input type="checkbox"/> American Paving C...	SHOP					
<input type="checkbox"/> American Paving C...	SHOP	4052	Gehl Co.	SL4625DX		HYDRAULIC

Click on the + button next to Filters to create a new filter. A new window will open, enter a name for your filter and click **Save**

Accessing Filters through the Labels Tab



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HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS

Quick Search



New Samples

History/Status

Remove All

Submit Samples

Filters



required fields

+ Fast Fill

	Component	Sampled Date	Unit Age	Lube Age	Age Units	Lube	Lube Added
	206 ENGINE	12/19/2014	563	10563	Hr	CASTROL "HYPURON ADV I	
Last Sample:05/18/2011 Unit Age: Lube Age:10000		Tracking Number: <input type="text"/>		Filter Changed: Yes		Comment: <input type="text"/>	
				Lube Service: Sampled			

Online Help

Home

Samples

You can save time when creating labels by creating a filter under the Labels tab. First fill out the **required fields** listed in yellow. To save this filter click on the + button

Accessing Filters through the Labels Tab

Add Filter



Save current search as a new filter


Demo Labels Filter

Save



Cancel

New Samples

History


 Remove All


+ Fast Fill


	Component	Sampled Date	Unit Age	Lube Age	Age Units	Lube	Lube Added
	206 ENGINE	12/19/2014	563	10563	Hr ▾	CASTROL "HYPURON ADV I 	
Last Sample: 05/18/2011 Unit Age: Lube Age: 10000		Tracking Number: <input type="text"/>		Filter Changed: Yes ▾		Comment: <input type="text"/>	
				Lube Service: Sampled ▾			


A new window will open, enter a name for your filter and click **Save**

Online Help

 Home

 Samples

 Castrol Labcheck Training Resources

 Castrol PDS & MSDS Sheets

Customer Care Center

1-866-522-2432

Labchecksupport@analystsinc.com

Accessing Filters through the Labels Tab

HOME SAMPLES EQUIPMENT **LABELS** REPORTS SETTINGS



NEW SAMPLES

HISTORY/STATUS

New Samples

History/Status



Status Report



Print Labels

1 ▾



Label Sheet
Start Position

Filters



☐ Small Labels

+ Filter History

Select Date Range

☐ Today ☒ Last 30 Days ☐ Last 60 Days ☐ Only Samples in Date Range

Earliest:

Latest:

Add Filters

Component

Unit ID

Worksite

Tracking Number

Status

hydraulic

Submit Search Criteria

Reset Form

<input type="checkbox"/>	Unit ID/Component	Sampled	Unit Age	Lube Age	Age	Lube	Lube
<input type="checkbox"/>	206 ENGINE	1					
	Last Sample: 05/18/2011						
	Unit						

Save time when searching for submitted samples by creating a filter on the **History/Status** tab. To start click on **Filter History** to expand the search table.

Accessing Filters through the Labels Tab



English

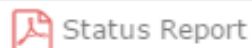
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HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS



New Samples

History/Status



Status Report



Print Labels

1



Label Sheet
Start Position

Filters

☐ Small Labels

+ Filter History

Select Date Range

☐ Today ☒ Last 30 Days ☐ Last 60 Days ☐ Only Samples in Date Range

Earliest:

Latest:

Add Filters

Component

Unit ID

Worksite

Tracking Number

Status

hydraulic

Submit Search Criteria

Reset Form

<input type="checkbox"/>	Unit ID/Component	Status	Tracking Number	Filter Changed:	Comment:
<input type="checkbox"/>	206 ENGINE	12			
	Last Sample: 05/18/2011		Tracking Number: E201412190005	Filter Changed: T	

Fill out one or more of the property options. Once properties are filled out click on **Submit Search Criteria**

Accessing Filters through the Labels Tab

Add Filter ×

Save current search as a new filter

Demo Engine Labels

Save **Cancel**

Click on the **+** button next to Filters to create a new filter. A new window will open, enter a name for your filter and click **Save**

Editing Filters



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HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS

Quick Search

Inbox Search

Quick Search

Quick filter

+ Advanced Search

Export XLS Print Report(s)

Filters

+

-- Select Filter --
Demo Engine Filter
Demo Filter 1

<input type="checkbox"/>	Severity	Sample...	Sample...	Receive...	Unit ID	Unit Mo...	Unit Ma...	Compo...	Compo.	Comer	
<input type="checkbox"/>	A	2014120...	Nov 10, ...	Dec 08, ...	92-103	CX135	Case	ENGINE	Unknow...	-	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.											
<input type="checkbox"/>	A	2014120...	Nov 29, ...	Dec 08, ...	92-112	-	-	ENGINE	Unknow...	-	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.											
<input type="checkbox"/>	A	2014120...	Dec 01, ...	Dec 08, ...	92-110	C-308	Caterpillar	ENGINE	Caterpillar	C-308	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.											
<input type="checkbox"/>	A	2014120...	Dec 05, ...	Dec 08, ...	51-113	5100-2	Vogele	ENGINE	Unknow...	-	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.											
<input type="checkbox"/>	A	2014120...	Dec 01, ...	Dec 08, ...	18-305	SP15	Wirtgen	DIESEL ...	Unknow...	-	AFOLINO
Test results are acceptable. No corrective action indicated. Resample at normal interval.											
<input type="checkbox"/>	A	2014120...	Nov 10, ...								
Test results are acceptable. No corrective action indicated. Resample at normal interval.											
<input type="checkbox"/>	B	2014120...	Nov 13, ...								
Fuel dilution contamination could...											

Total Items: 665

Page Size: 25 1 / 27

To modify or delete *any* of your filters select a filter from the drop down list. Then click on the **Edit Filter** button. This will bring you to the settings tab

Editing Filters



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HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS

Quick Search



Manage Filters

My Tests

Communications

Download Options

Demo Engine Filter
Demo Filter 1
Demo Filter 2
Demo Labels Filter

New Filter

Delete Filter

Copy Filter

Filter Name :

Demo Filter 2

Combine conditions with :

AND

Share in Hierarchy

Property	Type	Value	
Severity		<input type="checkbox"/> A <input type="checkbox"/> B <input checked="" type="checkbox"/> C <input checked="" type="checkbox"/> D	
Component	Equals	Engine	

You can add, modify or delete filters through the **Settings tab** under **Manage Filters**. Depending on which filter you have selected on the left side the right side will display the conditions for the filter.
For more detailed instructions please view the Filters quick start guide

Online Help

Editing Filters



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HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS

Quick Search



Manage Filters

My Tests

Communications

Download Options

Demo Engine Filter
Demo Filter 1
Demo Filter 2
Demo Labels Filter

New Filter

Delete Filter

Copy Filter

Filter Name :

Demo Filter 2

Combine conditions with :

AND

Share in Hierarchy ☐

Property	Type	Value	
Customer ▾	Equals ▾		
City Component Component Make Component Model Component Reference No. Condition Customer Customer List Equipment Type Oil Brand	▾	Engine	

tion

Save

Clear

Online Help

Conditions that were originally selected will display under **Property**. To change a property, select the drop down list and choose from the options below. When changing the property the **type** and **value** fields must be updated to reflect the property that was chosen

Editing Filters



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HOME SAMPLES EQUIPMENT LABELS REPORTS SETTINGS

Quick Search



Manage Filters

My Tests

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Download Options

Demo Engine Filter
Demo Filter 1
Demo Filter 2
Demo Labels Filter

New Filter

Delete Filter

Copy Filter

Filter Name :

Demo Filter 2

Combine conditions with :

AND

Share in Hierarchy

Property	Type	Value	
Severity		<input type="checkbox"/> A <input type="checkbox"/> B <input checked="" type="checkbox"/> C <input checked="" type="checkbox"/> D	
Component	Equals	Engine	

New Condition

Save

Clear

Online Help

To delete a condition select on the **trash icon** next to the condition you want to remove. To delete a filter select it from the left side of the screen so that it is highlighted in gray then click the **Delete Filter** button



LABCHECK SUPPORT DESK:

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www.LabcheckResources.com