



# Quick Start Guide

## Filters Advanced

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

Filters also are applicable to the “Distribution” feature, see the “*Report Distributions Quick Start Guide*” 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"><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><li>• Equipment Type</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>

# 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



Select Language English

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HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

Quick Search

Need Help ?

Inbox

Search

## Sample Search

Quick filter here

[+ Advanced Search](#)

Export XLS

Print Report(s)

Show/hide columns

## Filters

### Date Range

☒ All Samples

☐ Only Samples in Reviewed Date Range

Earliest:

Latest:

### Severity

☒ A ☒ B ☒ C ☒ D

### Customer

Name

Worksite

State

Zip Code

### Unit

ID

Worksite

M

U

### 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**.

# Accessing Filters through the Samples Tab

## Add Filter




Save current search as a new filter

Engines - C & D Code

Save

Cancel

### Sample Search

Quick filter here 

[+ Advanced Search](#)

<input type="checkbox"/>	Severity	Sample Number	Sampled Date	Received Date	Unit ID	Unit Make	Unit Model
<input type="checkbox"/>	<b>D</b>	201412100234	Dec 01, 2014	Dec 10, 2014	605	Mack	CV713
Increased wear is occurring, and may be associated with changes in viscosity grade. Suggest checking operating conditions. Elevated level of Silicon could indicate the							
confirm results. When C or D codes are present, the following is recommended, if not done at time of sampling. Change oil, and filters (if applicable), to remove conta							
<input type="checkbox"/>	<b>D</b>	201412091572	Nov 28, 2014	Dec 09, 2014	19410	Ford	F550SD
Excessive fuel dilution could reduce lubricity which could lead to excessive wear. Suggest checking for defective injectors and other sources of fuel leaks. Increased							
positive result, please RESAMPLE IMMEDIATELY to verify results. If this result has been confirmed by 1 or more prior positive responses, PLEASE INVESTIGATE							
<input type="checkbox"/>	<b>D</b>	201412091567	Nov 20, 2014	Dec 09, 2014	19411	Ford	F750 SD
Iron and Chromium levels are elevated. Possible sources of wear (if applicable) could be rings (cast), cylinders or perhaps gears, crankshaft, wrist pins, cam shaft, v							
increase in viscosity. Check for proper operating conditions. Nickel level is elevated. Possible sources of wear (if applicable) could be valve guides, bearings and or s							
off-line filtration if available. Closely monitor unit and resample at one half the normal service interval.							
<input type="checkbox"/>	<b>C</b>	201412091323	Nov 26, 2014				
Increased wear is occurring, and may be associated with changes in viscosity grade. Suggest checking operating conditions. Elevated level of Silicon could indicate the							
responses, PLEASE INVESTIGATE. Fuel dilution result has been confirmed by 1 or more prior positive responses, PLEASE INVESTIGATE.							
<input type="checkbox"/>	<b>D</b>	201412090835	Dec 01, 2014				
Excessive fuel dilution could reduce lubricity which could lead to excessive wear. Suggest checking for defective injectors and other sources of fuel leaks. Increased							
positive result, please RESAMPLE IMMEDIATELY to verify results. If this result has been confirmed by 1 or more prior positive responses, PLEASE INVESTIGATE.							

Once you see your search results, click on the **+** button next to Filters. A new window will open, enter a name for your filter and click **Save**.

# Accessing Filters through the Samples Tab



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HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

Quick Search

Need Help ?

Inbox

Search

## Sample Search

Quick filter here

+ Advanced Search

Export XLS

Print Report(s)

Show/hide columns

## Filters

-- Select Filter --

Engines - C & D Code

<input type="checkbox"/>	Severity	Sample Number	Sampled Date	Received Date	Unit ID		
<input type="checkbox"/>	<b>D</b>	201412100234	Dec 01, 2014	Dec 10, 2014	605	Mack	CV713
Increased wear is occurring, and may be associated with changes in viscosity grade. Suggest checking operating conditions. Elevated level of Silicon could indicate tire contamination. Confirm results. When C or D codes are present, the following is recommended, if not done at time of sampling. Change oil, and filters (if applicable), to remove contaminants.							
<input type="checkbox"/>	<b>D</b>	201412091572	Nov 28, 2014	Dec 09, 2014	19470	Ford	F550SD
Excessive fuel dilution could reduce lubricity which could lead to excessive wear. Suggest checking for defective injectors and other sources of fuel leaks. Increased positive result, please RESAMPLE IMMEDIATELY to verify results. If this result has been confirmed by 1 or more prior positive responses, PLEASE INVESTIGATE.							
<input type="checkbox"/>	<b>D</b>	201412091567	Nov 20, 2014	Dec 09, 2014	19461	Ford	F750 SD
Iron and Chromium levels are elevated. Possible sources of wear (if applicable) could be rings (cast), cylinders or perhaps gears, crankshaft, wrist pins, cam shaft, valve train, etc. Increase in viscosity. Check for proper operating conditions. Nickel level is elevated. Possible sources of wear (if applicable) could be valve guides, bearings and or seals. Off-line filtration if available. Closely monitor unit and resample at next oil change.							
<input type="checkbox"/>	<b>C</b>	201412091323	Nov 26, 2014				
Increased wear is occurring, and may be associated with changes in viscosity grade. Suggest checking operating conditions. Elevated level of Silicon could indicate tire contamination. Confirm results. When C or D codes are present, the following is recommended, if not done at time of sampling. Change oil, and filters (if applicable), to remove contaminants.							
<input type="checkbox"/>	<b>D</b>	201412090835	Dec 01, 2014				
Excessive fuel dilution could reduce lubricity which could lead to excessive wear. Suggest checking for defective injectors and other sources of fuel leaks. --RECOMMENDATION--							

Your filter has now been saved. To use this saved filter, **select** from the drop down list under Filters. Once selected search results will automatically display.

# Accessing Filters through the Samples Tab



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HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

Quick Search

Need Help?

Browse Tree

Find Units



Clear



New Samples



Download Equipment

Filters





<input type="checkbox"/>	Customer	Worksite	Unit ID	Unit Manufacturer	Unit Model	Component
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Caterpillar"/>	<input type="text"/>	<input type="text" value="Engine"/>
<input type="checkbox"/>	Pleasants Excavating Com	PLEASANTS EXCAVATING	PR-53	Caterpillar	CB34	ENGINE
<input type="checkbox"/>	Pleasants Excavating Com	PLEASANTS EXCAVATING	P-86	Caterpillar	621B PAN	ENGINE
<input type="checkbox"/>	Stewart & Tate Inc.	YORK, PA	1044	Caterpillar	320CL	ENGINE
<input type="checkbox"/>	Coolsprings Stone Supply	UNIONTOWN	T32	Caterpillar	775D	ENGINE
<input type="checkbox"/>	Pleasants Excavating Com	PLEASANTS EXCAVATING	PV-21	Caterpillar	AP-1055D	ENGINE
<input type="checkbox"/>	American Paving Corp.	SHOP	4008	Caterpillar	IT38G	ENGINE
<input type="checkbox"/>	Acme Lubricants Site 2	Smithville, PA	CAT LOADER 988B	Caterpillar	988B	ENGINE
<input type="checkbox"/>	Acme Construction Co. Inc	MOUNTVILLE, PA	D8R-1			
<input type="checkbox"/>	Hoover Truck Repair	HOOVER TRUCK REPAIR	STEVE			
<input type="checkbox"/>	Cherry Hill Construction	JESSUP MD	R00-0			
<input type="checkbox"/>	Stewart & Tate Inc.	YORK, PA	6025			
<input type="checkbox"/>	Stewart & Tate Inc.	YORK, PA	1045			

To create a filter under Equipment, click on the **Find Units** tab. From here you can run a search using the 6 properties at the top. Once you have your search criteria filled out, your results will display below.






# Accessing Filters through the Equipment Tab

 Select Language  English ▾  
by ▾ Last login on 06/26/2015  
ch Need Help ?

HOME SAMPLES E

Browse Tree Find Units

 Clear  New

**Add Filter** 

Save current search as a new filter

Caterpillar Engines

**Save** Cancel

<input type="checkbox"/>	Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Component
<input type="checkbox"/>		x	x	x	Caterpillar	x	Engine
<input type="checkbox"/>	Pleasants Excavating Cor	PLEASANTS EXCAVATING	PR-53	Caterpillar	CB34	ENGINE	
<input type="checkbox"/>	Pleasants Excavating Cor	PLEASANTS EXCAVATING	P-86	Caterpillar	621B PAN	ENGINE	
<input type="checkbox"/>	Stewart & Tate Inc.	YORK, PA	1044	Caterpillar	320CL	ENGINE	
<input type="checkbox"/>	Coolsprings Stone Supply	UNIONTOWN	T32	Caterpillar	775D	ENGINE	
<input type="checkbox"/>	Pleasants Excavating Cor	PLEASANTS EXCAVATING	PV-21	Caterpillar	AP-1055D	ENGINE	
<input type="checkbox"/>	American Paving Corp.	SHOP	4008	Caterpillar	IT38G	ENGINE	
<input type="checkbox"/>	Acme Lubricants Site 2	Smithville, PA	CAT LOADER 988B	Caterpillar	988B	ENGINE	
<input type="checkbox"/>	Acme Construction Co. Inc	MOUNTVILLE, PA	D8R-1				
<input type="checkbox"/>	Hoover Truck Repair	HOOVER TRUCK REPAIR	STEVE FOX				
<input type="checkbox"/>	Cherry Hill Construction	JESSUP MD	R00-002				
<input type="checkbox"/>	Stewart & Tate Inc.	YORK, PA	6025				

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 PREFERENCES ADMIN

Quick Search

Need Help ?

New Samples

History/Status

Filters

Remove All

Submit Samples



required fields

+ Fast Fill

	Unit ID/Component	Sampled Date	Unit Age	Lube Age	Age Units	Lube	Lube Added
	1044 ENGINE	<input type="text" value="Jun 26, 2015"/>	<input type="text" value="8000"/>	<input type="text" value="291"/>	<input type="text" value="Hrs"/> ▾	<input 15w"="" extra"="" tection="" type="text" value="CASTROL "/>	<input type="text"/>
Last Sample: 10/24/2014 Unit Age: 7709 Lube Age: 0		Tracking Number: <input type="text"/>		Filter Changed: <input type="text" value="Yes"/> ▾  Lube Service: <input type="text" value="Sampled"/> ▾		Comment: <input type="text"/>	

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



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Quick Search

Need Help ?

## Add Filter



Save current search as a new filter

Demo Labels Filter

Save

Cancel

New Samples

History/Status

Remove All

Submit Sa

+ Fast Fill

required fields

	Unit ID/Component	Sampled Date	Unit Age	Lube Age	Age Units	Lube	Lube Added
	1044 ENGINE	Jun 26, 2015	8000	291	Hrs ▼	CASTROL "TECTION EXTRA" 15W	
Last Sample:10/24/2014 Unit Age:7709 Lube Age:0		Tracking Number: <input type="text"/>		Filter Changed: Yes ▼		Comment: <input type="text"/>	

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

# Accessing Filters through the Labels Tab

HOME

SAMPLES

EQUIPMENT

**LABELS**

REPORTS

PREFERENCES

ADMIN

Need  
Help ?

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:

MMM dd, yyyy

Latest:

MMM dd, yyyy

Add Filters

Component

Unit ID

Worksite

Tracking Number

Status

Submit Search Criteria

Reset Form



Unit  
ID/Component

Sampled  
Date

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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Last login on 06/26/2015

HOME

SAMPLES

EQUIPMENT

**LABELS**

REPORTS

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ADMIN

Need Help?

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:

MMM dd, yyyy

Latest:

MMM dd, yyyy

## Add Filters

Component

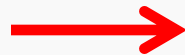
Unit ID

Worksite

Tracking Number

Status

12345



Submit Search Criteria

Reset Form

<input type="checkbox"/>	Unit ID/Component	Sampled Date	Unit Age
<input type="checkbox"/>	1235 ENGINE	06/25/2015	8000
	Last Sampled: 01/11/2012	Tracking Number:	

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

The screenshot displays the Castrol LABCHECK Next Generation web application. 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 Labels" and two buttons: "Save" and "Cancel".

In the background, the "Filters" section is visible, featuring a table with columns: Component, Unit ID, Worksite, Tracking Number, and Status. The "Component" column has a dropdown menu currently showing "hydraulic". Below the table are two buttons: "Submit Search Criteria" and "Reset Form".

A red callout box at the bottom right contains the following 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**." Two red arrows point from this callout to the "+" button in the "Filters" section and the "Save" button in the "Add Filter" dialog.

**Castrol LABCHECK NEXT GENERATION**

English

HOME

New Samples

Status Rep

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

	Unit ID/Component	Sampled Date	Unit Age	Lube Age	Age	Lube	Lube
<input type="checkbox"/>	206 ENGINE	12/19/2014					
<input type="checkbox"/>	Last Sample: 05/18/2011	Tracking: E2014					

# Editing Filters



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HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

Quick Search

Need Help ?

Inbox Search

## Sample Search

Quick filter h

+ Advanced Search

Export XLS

Print Report(s)

Show/hide columns

## Filters

Engines - C & ▼



-- Select Filter --

Caterpillar Engines

Engines - C & D Code

<input type="checkbox"/>	Severity	Sample Number	Sampled Date	Received Date	Unit ID	
<input type="checkbox"/>	<b>D</b>	201506240372		Jun 24, 2015	3002	Unknown/Unspecified
Potassium is elevated.--RECOMMENDATIONS --Test results are acceptable. No corrective action indicated.Resample at normal interval.Wet chemical Gly						
<input type="checkbox"/>	<b>D</b>	201506231065		Jun 23, 2015	2399	Unknown/Unspecified
Oxidation level is elevated.The tested viscosity is below the range for the oil type specified on the sample information label. Possible causes for viscosity unit/compartments for proper operating conditions. --RECOMMENDATIONS -- If this is an initial positive result, please RESAMPLE IMMEDIATELY to verify						
<input type="checkbox"/>	<b>C</b>	201506240374	Jun 23, 2015	Jun 24, 2015	1654	Unknown/Unspecified
Increased nitration can cause the formation of acid in the oil, along with possible increase in viscosity. Check for proper operating conditions.Oxidation level						
<input type="checkbox"/>	<b>D</b>	201506240287	Jun 23, 2015	Jun 24, 2015	2019	Autocar
The presence of high Silicon with the reported level of metal(s) could indicate wear. Suggest checking source of contamination and monitor components for						
<input type="checkbox"/>	<b>D</b>	201506230314	Jun 23, 2015	Jun 23, 2015	LABEL # 95248	Unknown/Unspecified
Increased wear is occurring, and may be associated with recommended, if not done at time of sampling.						
<input type="checkbox"/>	<b>D</b>	201506220886				
Copper level elevated. Possible sources could						

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 Preferences tab.

# Editing Filters

Manage Filters

My Tests

Communications

General

Caterpillar Engines  
Engines - C & D Code

New Filter

Delete Filter

Copy Filter



Filter Name :

Caterpillar Engines

Combine conditions with :

AND

Share in Hierarchy

Property	Type	Value	
Component ▼	Starts With ▼	Engine	
Unit Make ▼	Starts With ▼	Caterpillar	

New Condition

Save

Clear

You can add, modify or delete filters through the **Preferences 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.*



# Editing Filters



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HOME SAMPLES EQUIPMENT LABELS REPORTS PREFERENCES ADMIN

Quick Search

Need Help?

Manage Filters

My Tests

Communications

General

Caterpillar Engines  
Engines - C & D Code

New Filter

Delete Filter

Copy Filter

Filter Name :

Caterpillar Engines

Combine conditions with :

AND

Share in Hierarchy



Property	Type	Value	
Component	Starts With	Engine	
Customer			
Customer List			
Equipment Type	With	Caterpillar	
Oil Brand			
Oil Grade			
Oil Manufacturer			
Result Name			
Sample Date Range			
Sample Number			
Severity			
State			

Addition

Save

Clear

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 PREFERENCES ADMIN

Quick Search

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Manage Filters

My Tests

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General

Caterpillar Engines  
Engines - C & D Code

New Filter

Delete Filter

Copy Filter

Filter Name :

Caterpillar Engines

Combine conditions with :

AND

Share in Hierarchy

Property	Type	Value	
Component ▼	Starts With ▼	Engine	
Unit Make ▼	Starts With ▼	Caterpillar	

New Condition

Save

Clear

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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