



Quick Start Guide

Filters

Learn How To:

1. What Filters Are & Their Functionality
2. How to Create A Filter

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.

Accessing Filters



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Communications

General

null
Caterpillar Engines
Engines - C & D Code

New Filter

Delete Filter

Copy Filter

Filter Name :

Filter

Combine conditions with :

AND

Share in Hierarchy

Property	Type	Value	
City	Equals		

New Condition

Save

Clear

To access Filters, click on the **Preferences** tab and then select **Filters**.

Creating Filters



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New Filter

Delete Filter

Copy Filter

Filter Name :

Filter

Combine conditions with :

AND

Share in Hierarchy

Property

Type

Value

City

Equals

New Condition

Save

Clear

Click on the **New Filter** button to start creating your new filter. Next enter a **name** for your Filter and click on **New Condition**. Multiple Conditions can be created for each filter.

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New Filter

Delete Filter

Copy Filter

Filter Name :

Filter

Combine conditions with :

AND

Share in Hierarchy

Property	Type	Value	
City	Equals		

Customer
Customer List
Equipment Type
Oil Brand
Oil Grade
Oil Manufacturer
Result Name
Sample Date Range
Sample Number
Severity
State
Submitted Status
Submitted Tracking Number
Unit ID
Unit Make
Unit Model
Unit Name
Unit Number
Unit Type
Work Order
Zip Code

Add Condition

Save

Clear

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

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New Filter

Delete Filter

Copy Filter

Filter Name :

Filter

Combine conditions with :

AND

Share in Hierarchy

Property	Type	Value	
Unit ID	Equals		

Equals
Not Equals
Equals Comma Separated
Not Equals Comma Separated
Starts With
Contains
Starts With Comma Separated
Contains Comma Separated

Select your **Type** from the drop down list. Type means how you want the filter search to display. (Ex. "Equals" will match the characters entered in the value field verbatim).

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New Filter

Delete Filter

Copy Filter

Filter Name :

Filter

Combine conditions with :

AND

Share in Hierarchy

Property	Type	Value	
Unit ID	Equals	54321	

New Condition

Save

Clear

Insert a **Value**. The value field should be filled out based on what property you selected. In this example, because Component is the property and the type is Equals this filter will pull up all engine components.

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New Filter

Delete Filter

Copy Filter

Filter Name :

Filter

Combine conditions with :

AND

Share in Hierarchy

Property	Type	Value	
Unit ID	Equals	54321	
Severity		<input type="checkbox"/> A <input type="checkbox"/> B <input checked="" type="checkbox"/> C <input checked="" type="checkbox"/> D	

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 step provided.

Saving Filters



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Filter

New Filter

Delete Filter

Copy Filter

Filter was saved successfully

Filter Name :

Filter

Combine conditions with :

AND

Share in Hierarchy

Property	Type	Value	
Unit ID	Equals	54321	
Severity		<input type="checkbox"/> A <input type="checkbox"/> B <input checked="" type="checkbox"/> C <input checked="" type="checkbox"/> D	

New Condition

Save

Clear

Once all of your conditions are filled out click on the **Save** button to save your filter. Once saved you will see a confirmation message at the top and your filter will appear on the list on the left.

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

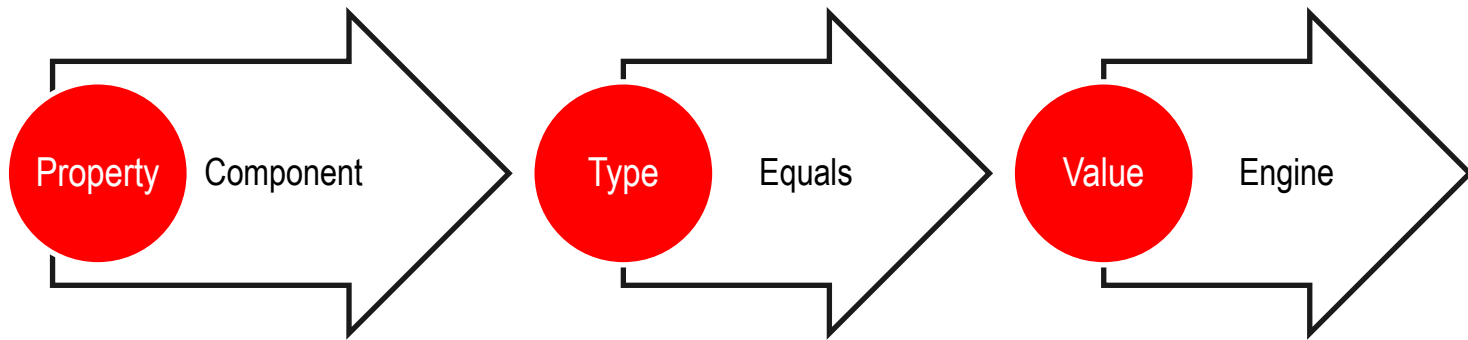
Starts With

- 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.

Filters Values

The Value field should be filled out based on what Property and Type are selected. For example if you are searching for specific reports but only want to view reports for engines you would select “Component” as the property. In the type field you would choose “Equals” because you know the exact component you are looking for. Last in the value field you would enter “Engine”. So for this example it would pull up all engines. Screenshots of this example are included in previous slides.





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