QUICK START GUIDE

FILTERS – ADVANCED

Learn How To:

1. **Use Filters & Their Functionality**
2. **How to Create a Filter in the Samples, Equipment & Labels Tabs**
3. **Delete Filters**

FILTER 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 portal. Based on the filter conditions that are applied, data will be displayed 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 and DISTRIBUTION tabs.

FILTER PROPERTIES

Filter Properties are the data fields in which you choose to apply your filter. Depending on which tab you are in, the applicable filter properties are applied.

The table below explains which properties are applicable on each tab.

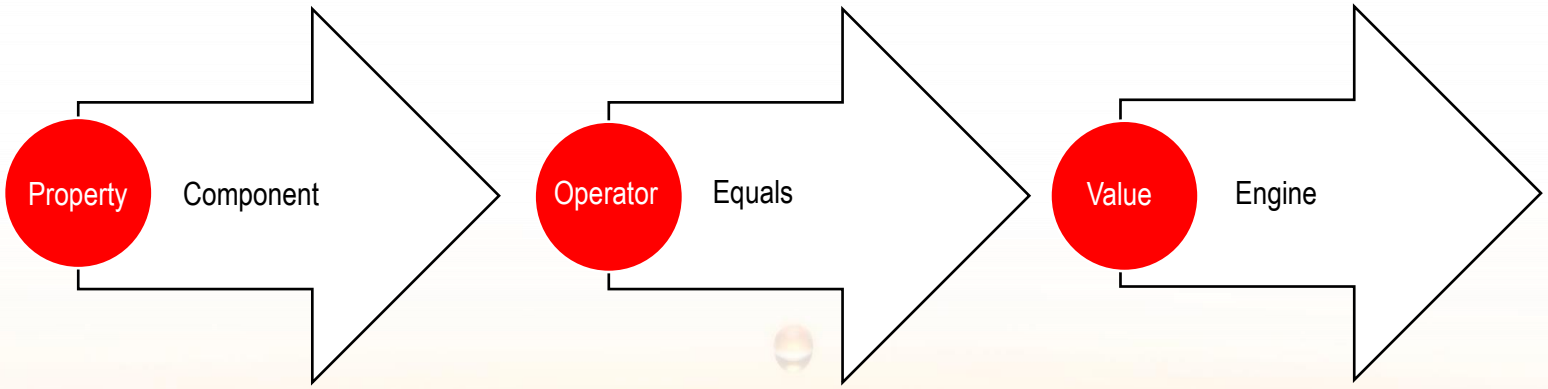
SAMPLES	EQUIPMENT	LABELS	REPORTS
Customer Name Customer Worksite City / State / Zip Unit ID Unit Worksite Unit Make Unit Model Component Type Component Make Component Model Component Reference Number Sample Condition Oil Manufacturer Oil Brand Oil Grade	Customer Worksite Unit ID Unit Manufacturer Unit Model Component	Component Unit ID Customer Worksite Tracking Number Status	Customer Worksite Date Range

FILTER OPERATORS

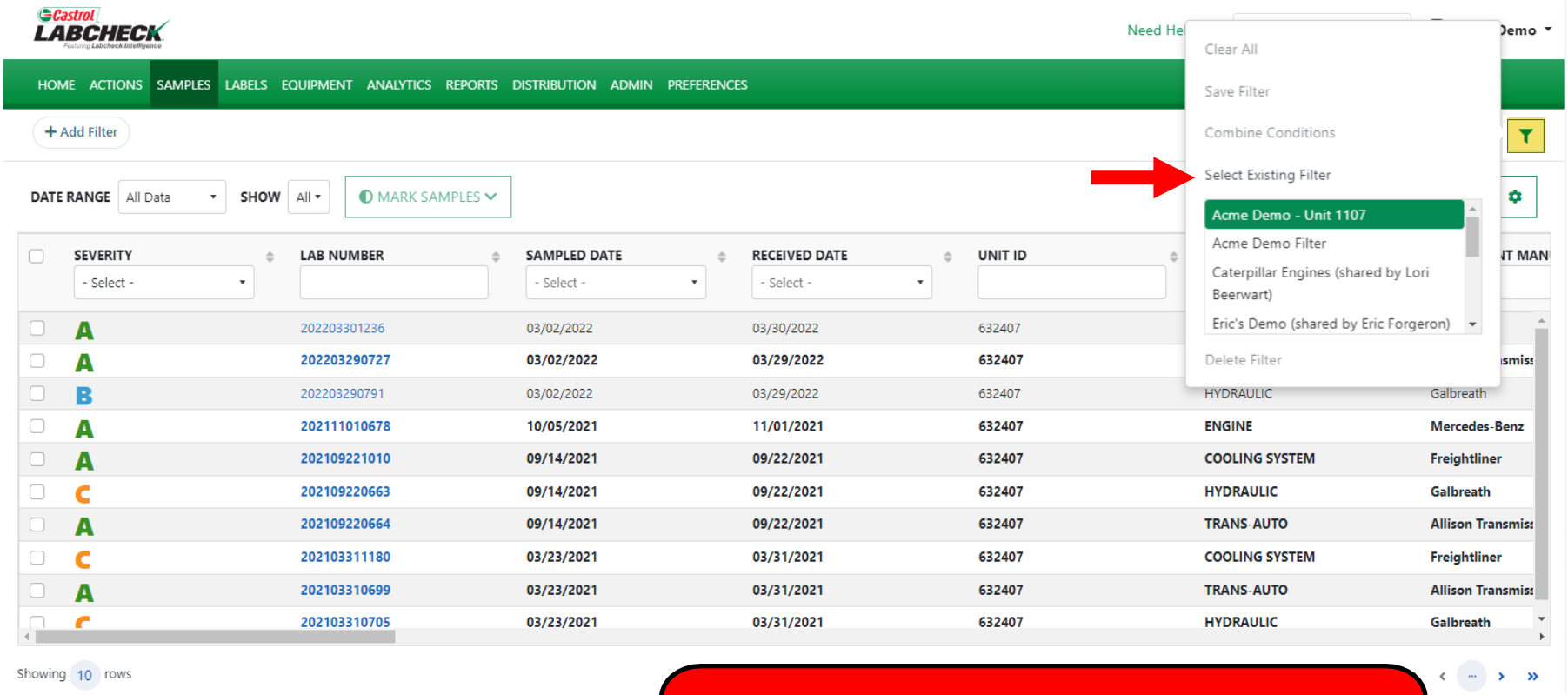
Equals	Will only display results that match the exact value input for the given property
Not equals	Will only display results that do not match the exact value input for the given property
Starts with	Will only display results that begin with the value input for the given property
Contains	Will only display results that contain the value input for the given property

FILTER VALUES

The Value field should be filled out based on what Property and Operator are selected. For example, if you are searching reports, but only want to view reports for engines, you would select ‘Component’ as the property. In the Operator 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.

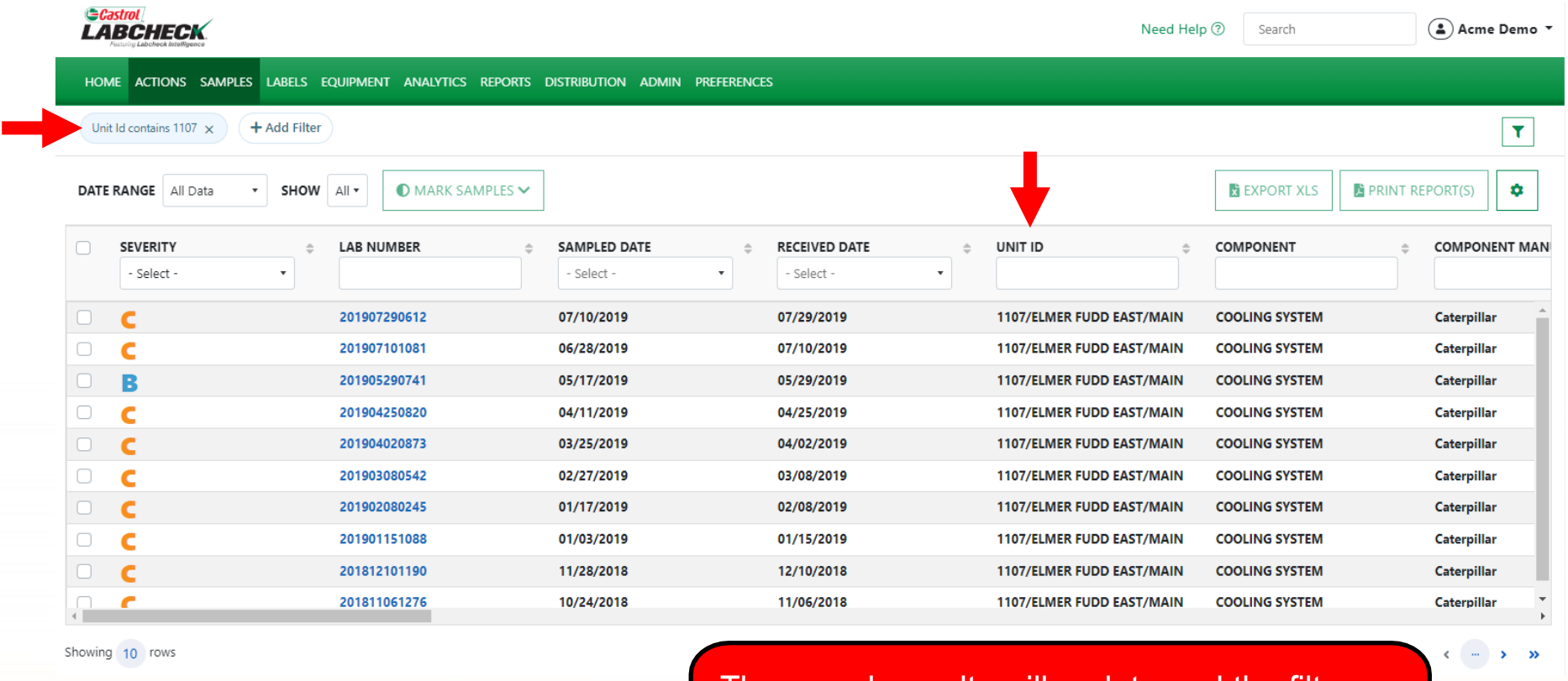


FILTERS ON THE SAMPLES TAB



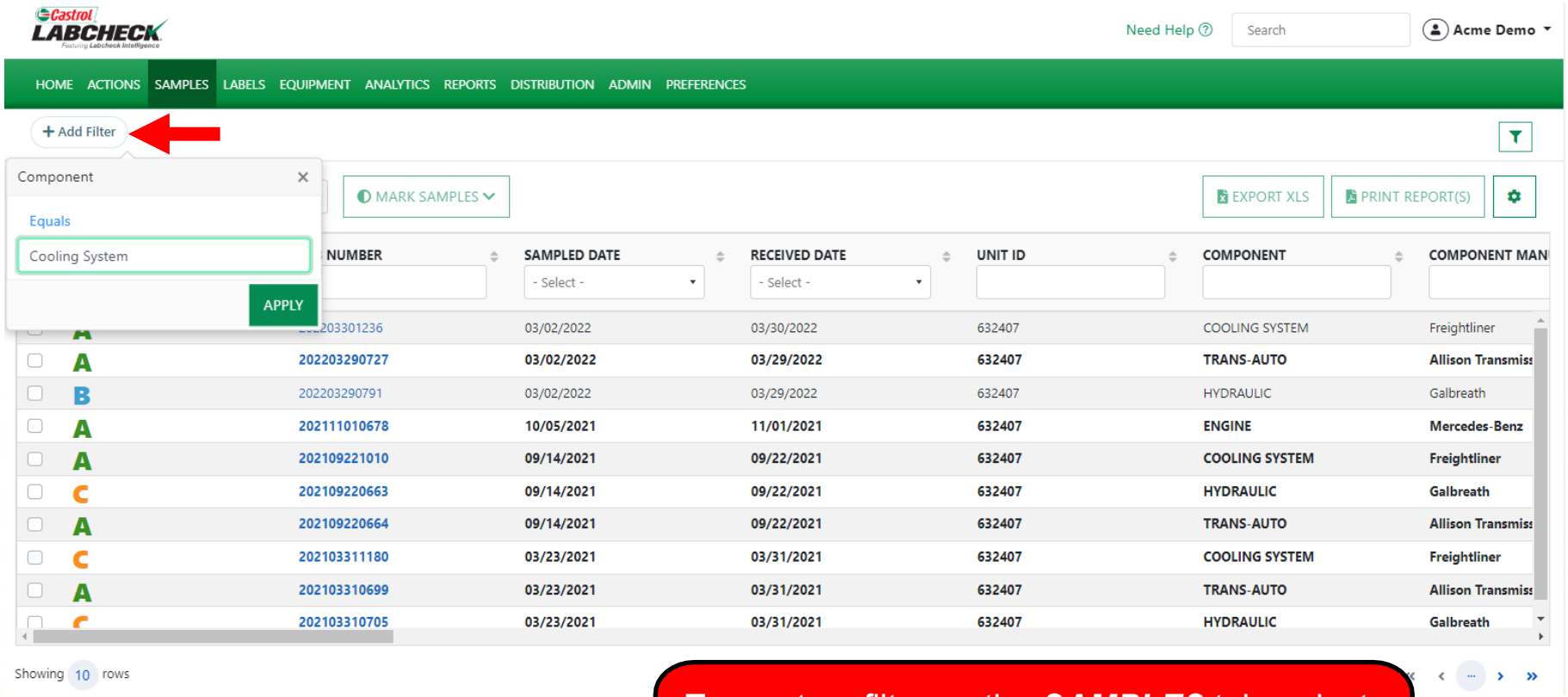
To access a filter on the ***SAMPLES*** tab, click on the **filter** icon and select 'Select Existing Filter.' Highlight and click on the desired filter.

FILTERS ON THE SAMPLES TAB



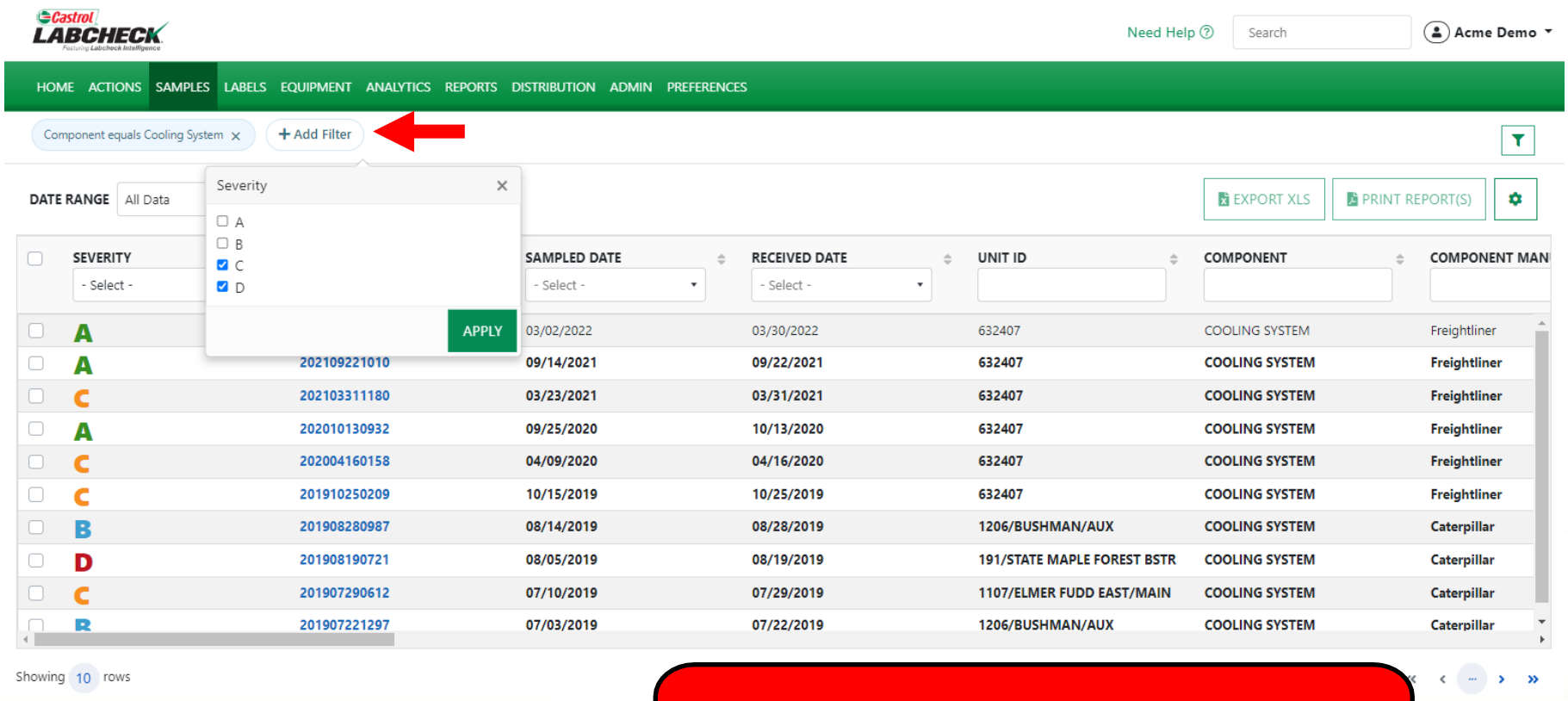
The search results will update and the filter properties will be displayed at the top of the page.

FILTERS ON THE SAMPLES TAB



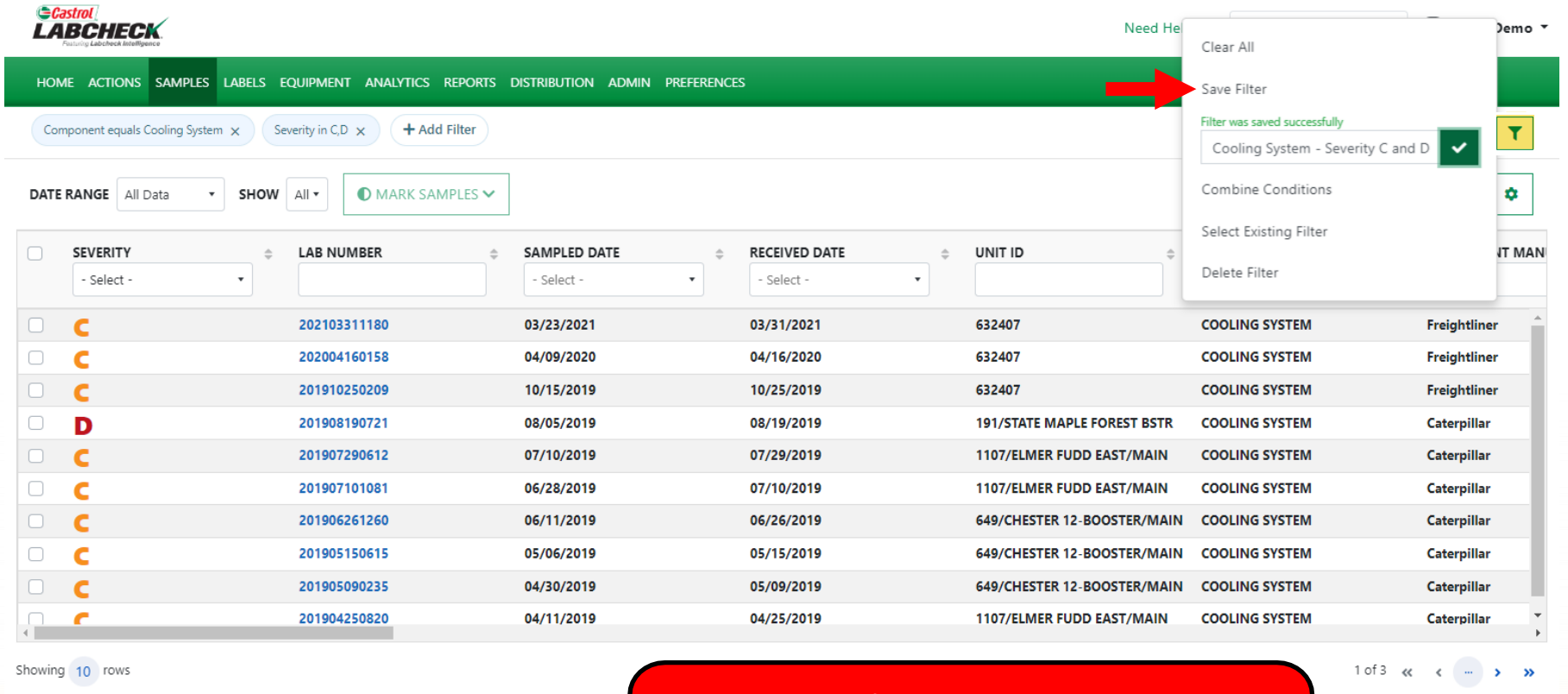
To create a filter on the ***SAMPLES*** tab, select the ***+Add Filter*** button and add your filter properties.

FILTERS ON THE SAMPLES TAB



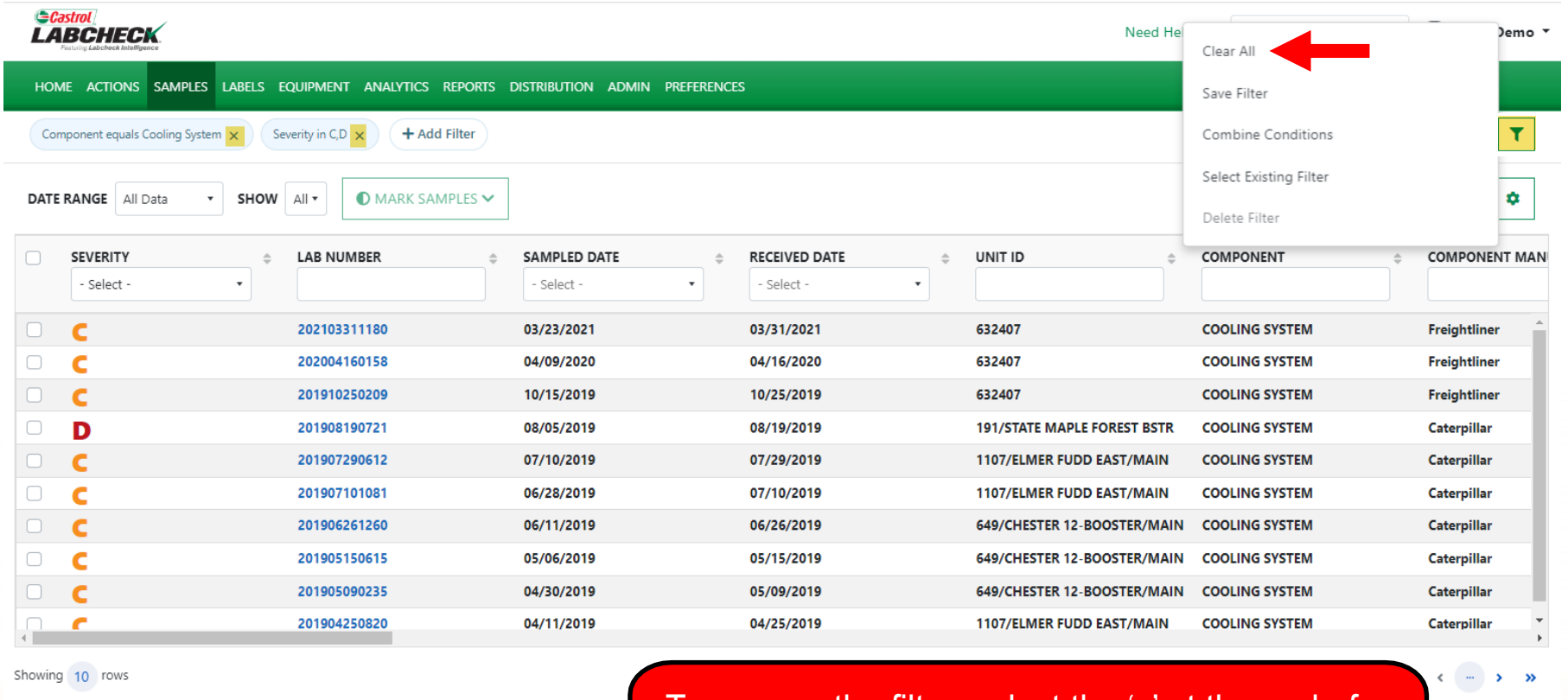
Select the ***+Add Filter*** button to add all desired filter properties.

FILTERS ON THE SAMPLES TAB



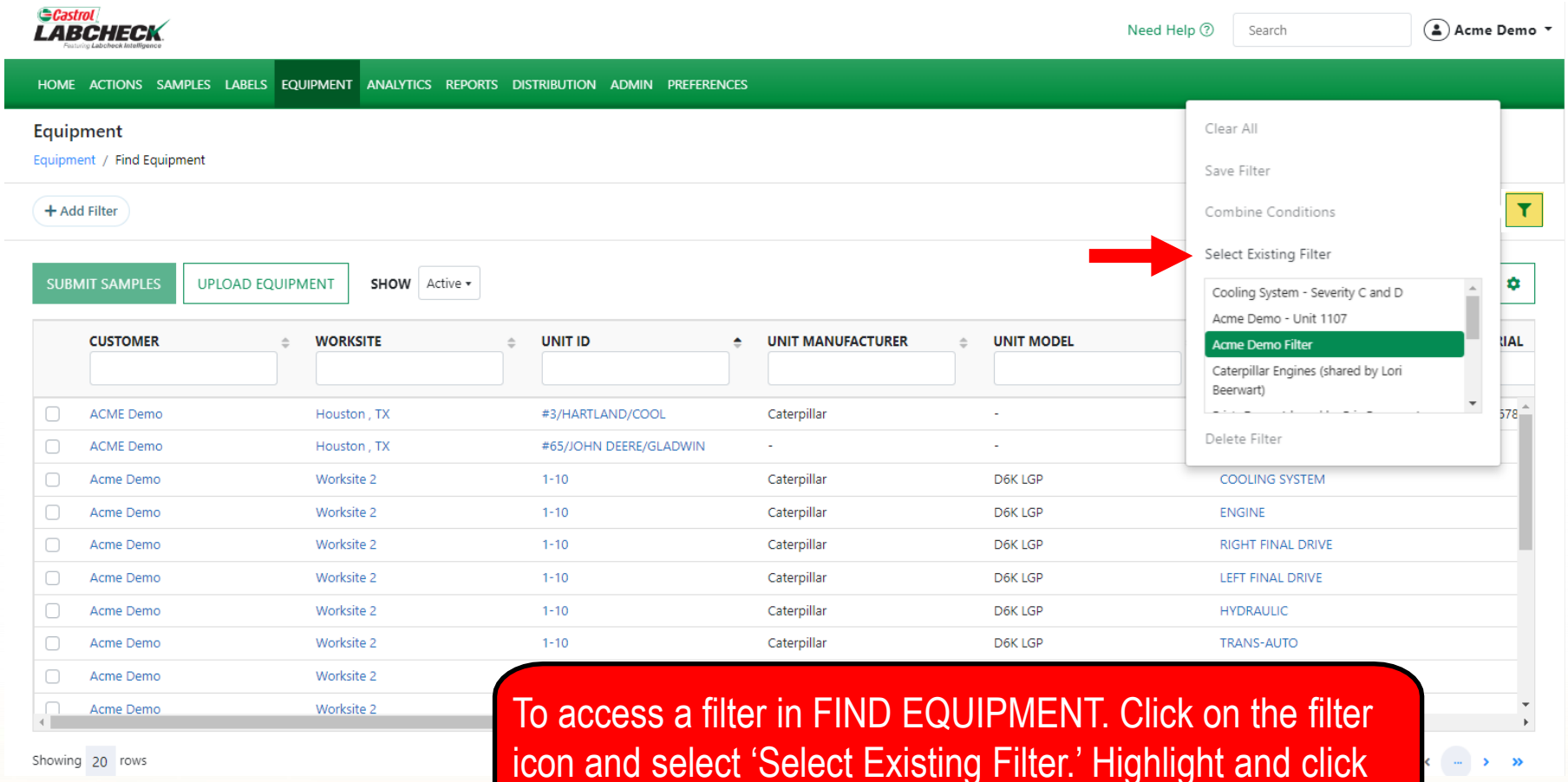
To save your filter properties, click the **filter** icon and select 'Save Filter.'
Enter the filter name and click the ✓.

FILTERS ON THE SAMPLES TAB



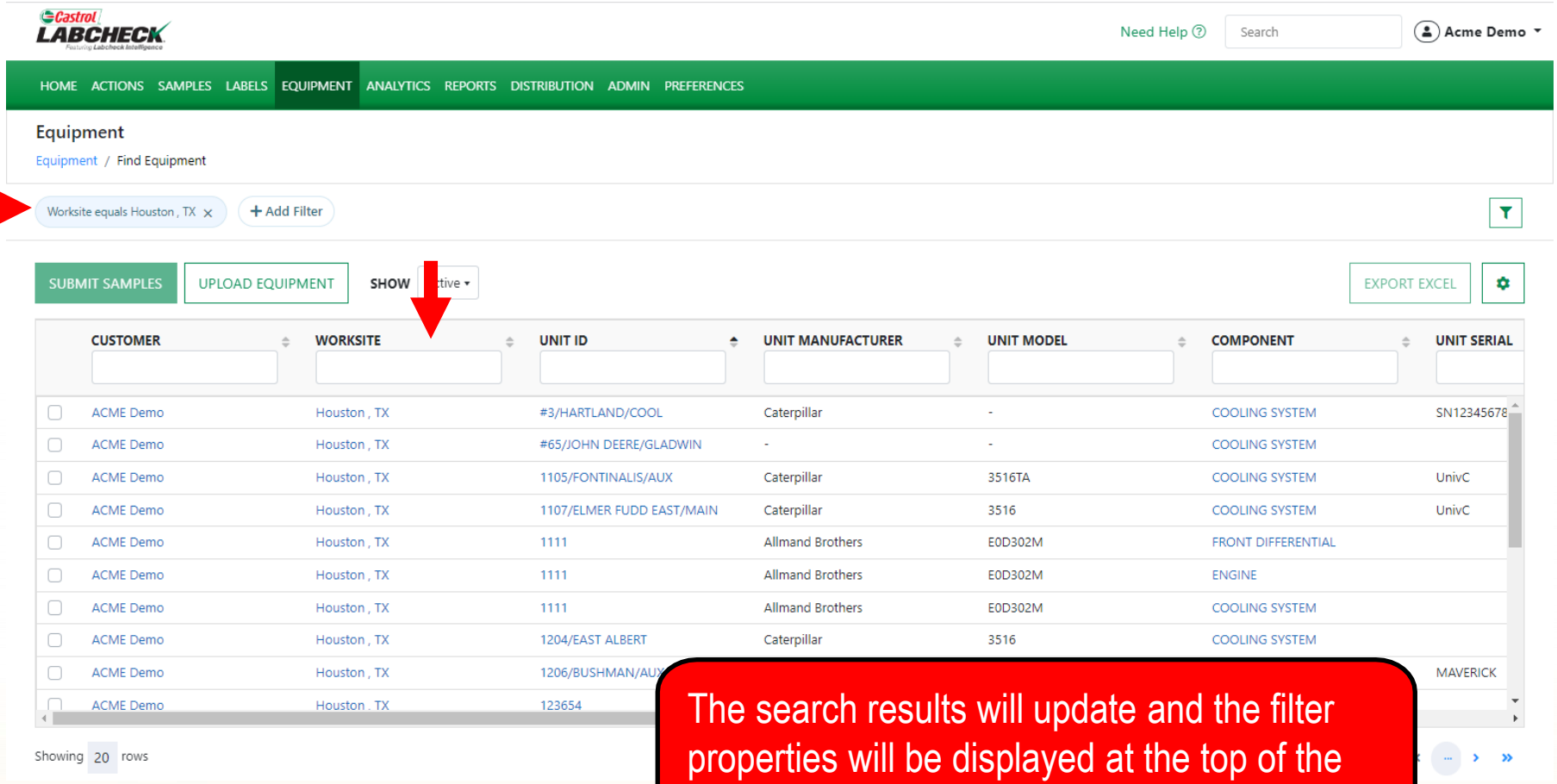
To remove the filter, select the ‘x’ at the end of each filter property or simply click on the **filter** icon and select ‘Clear All.’

FILTERS ON THE EQUIPMENT TAB



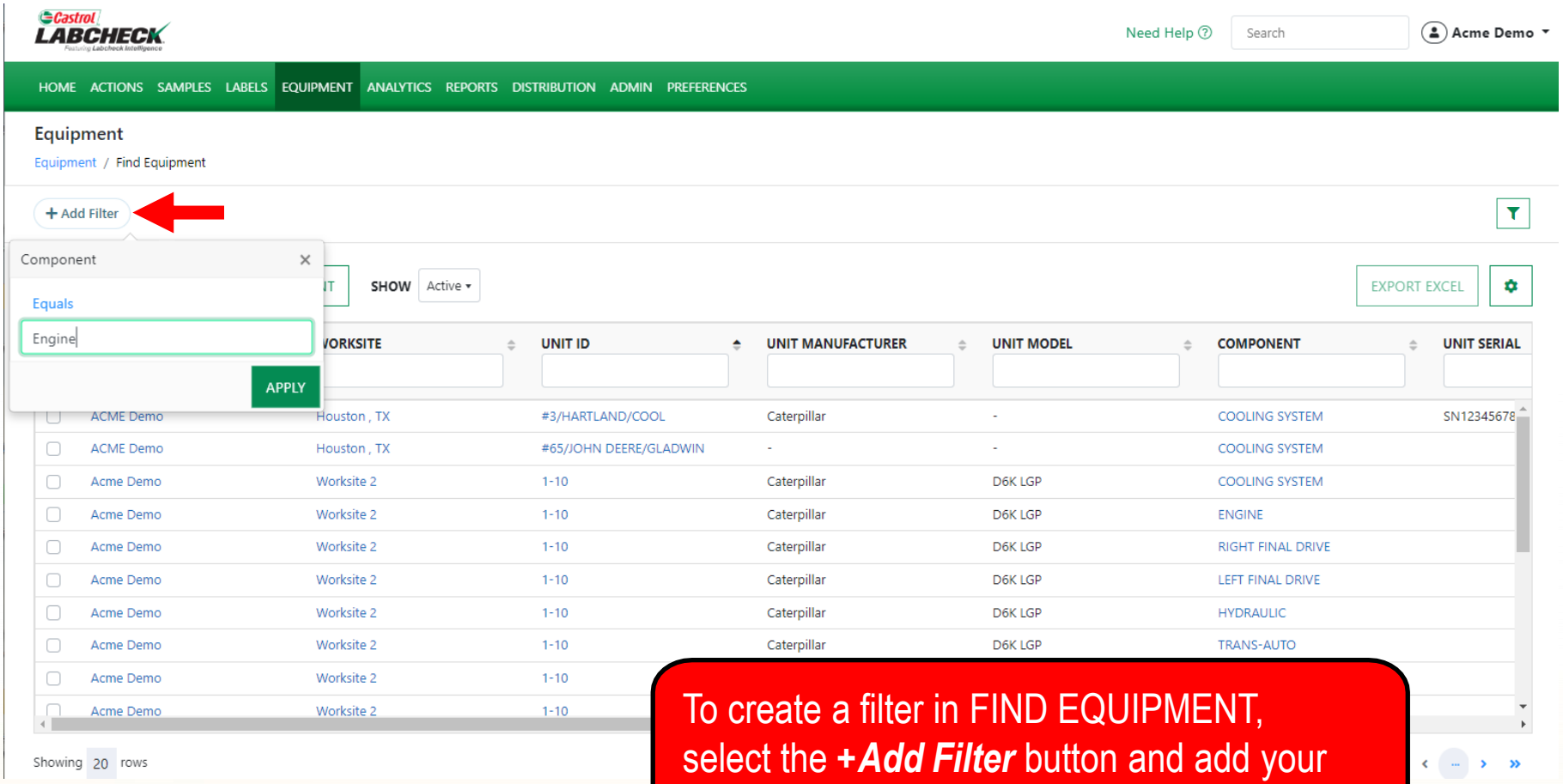
To access a filter in FIND EQUIPMENT. Click on the filter icon and select ‘Select Existing Filter.’ Highlight and click on the desired filter.

FILTERS ON THE EQUIPMENT TAB



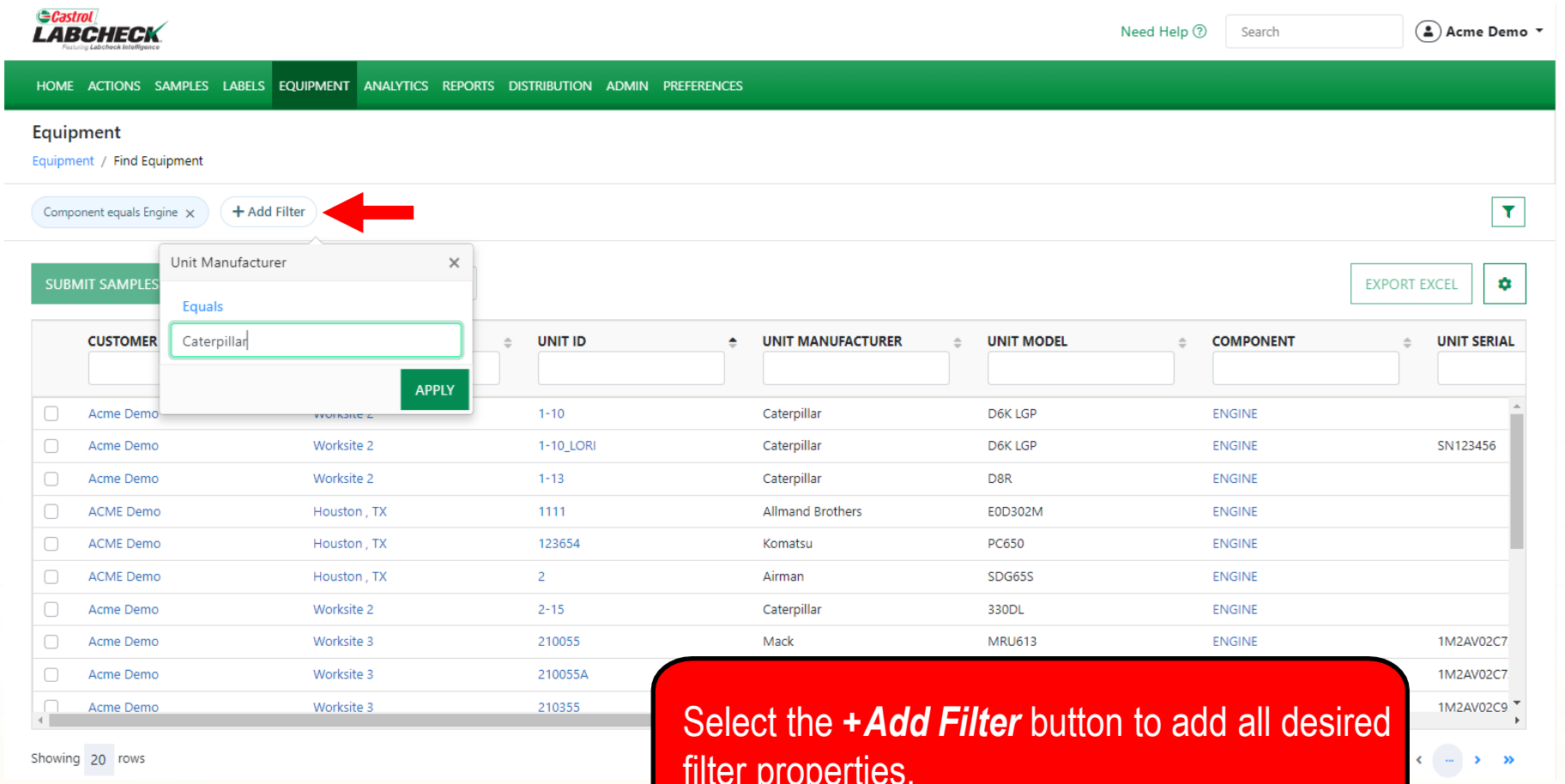
The search results will update and the filter properties will be displayed at the top of the page.

FILTERS ON THE EQUIPMENT TAB



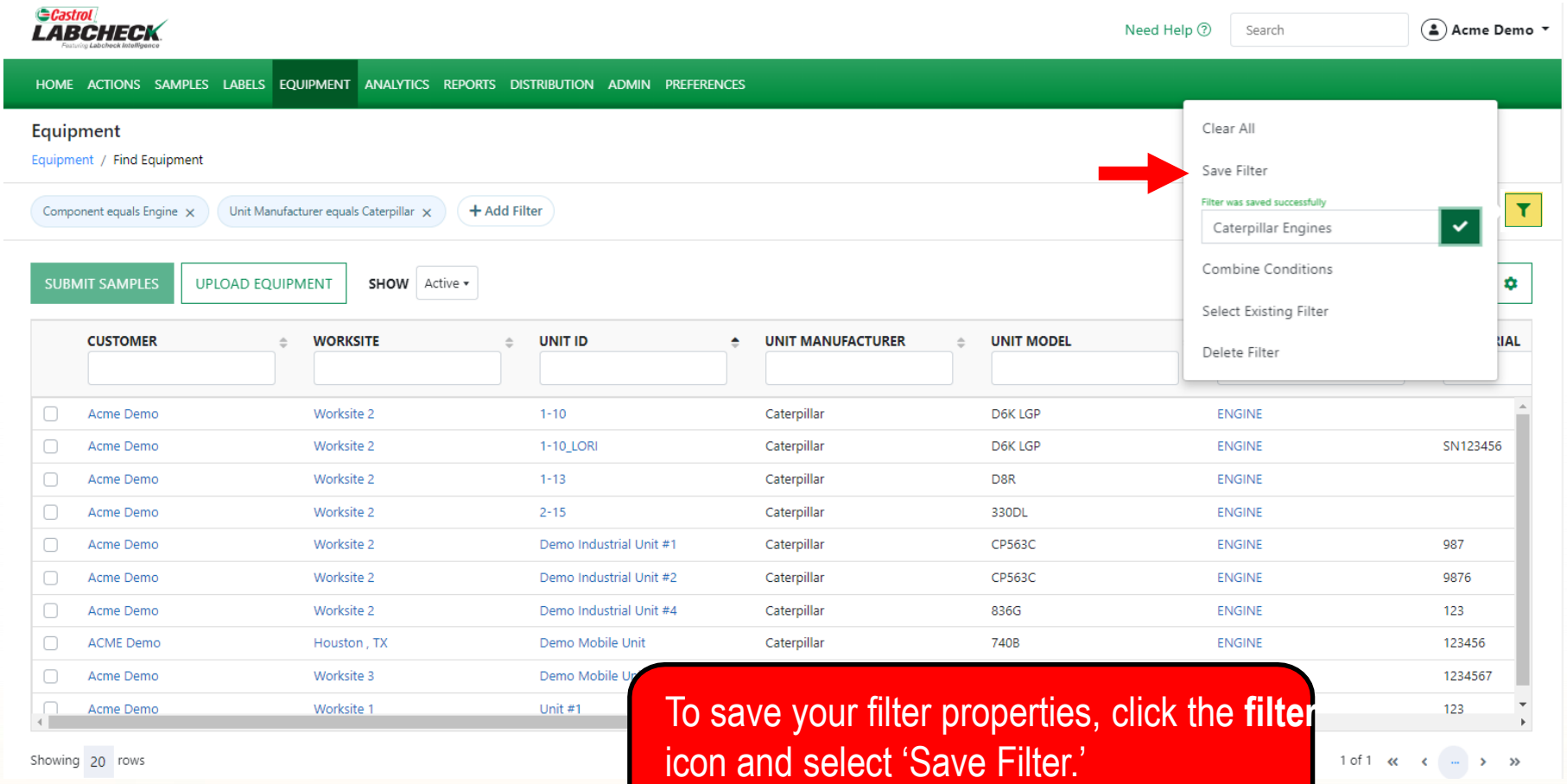
To create a filter in FIND EQUIPMENT, select the ***+Add Filter*** button and add your filter properties.

FILTERS ON THE EQUIPMENT TAB



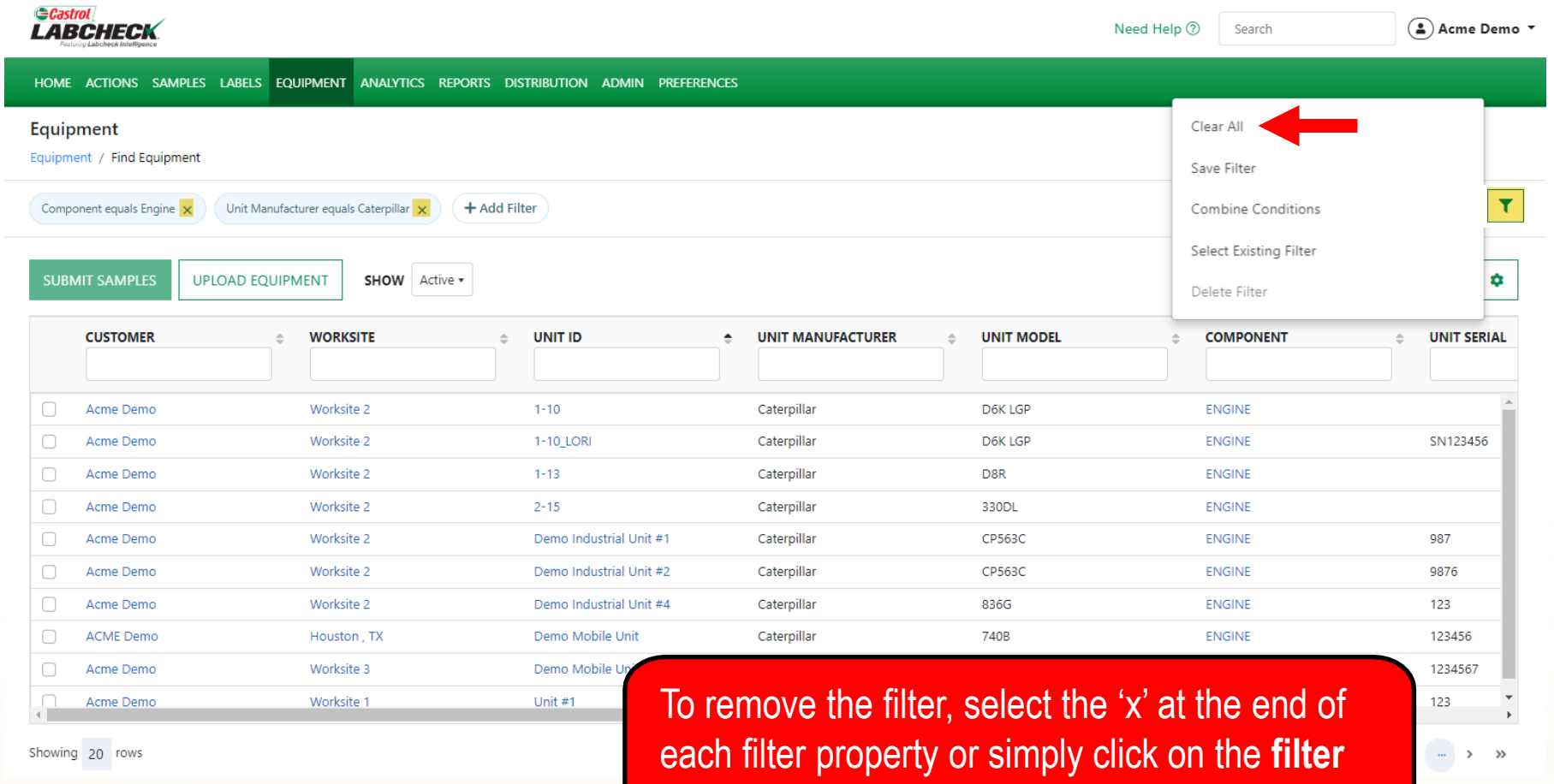
Select the ***+Add Filter*** button to add all desired filter properties.

FILTERS ON THE EQUIPMENT TAB



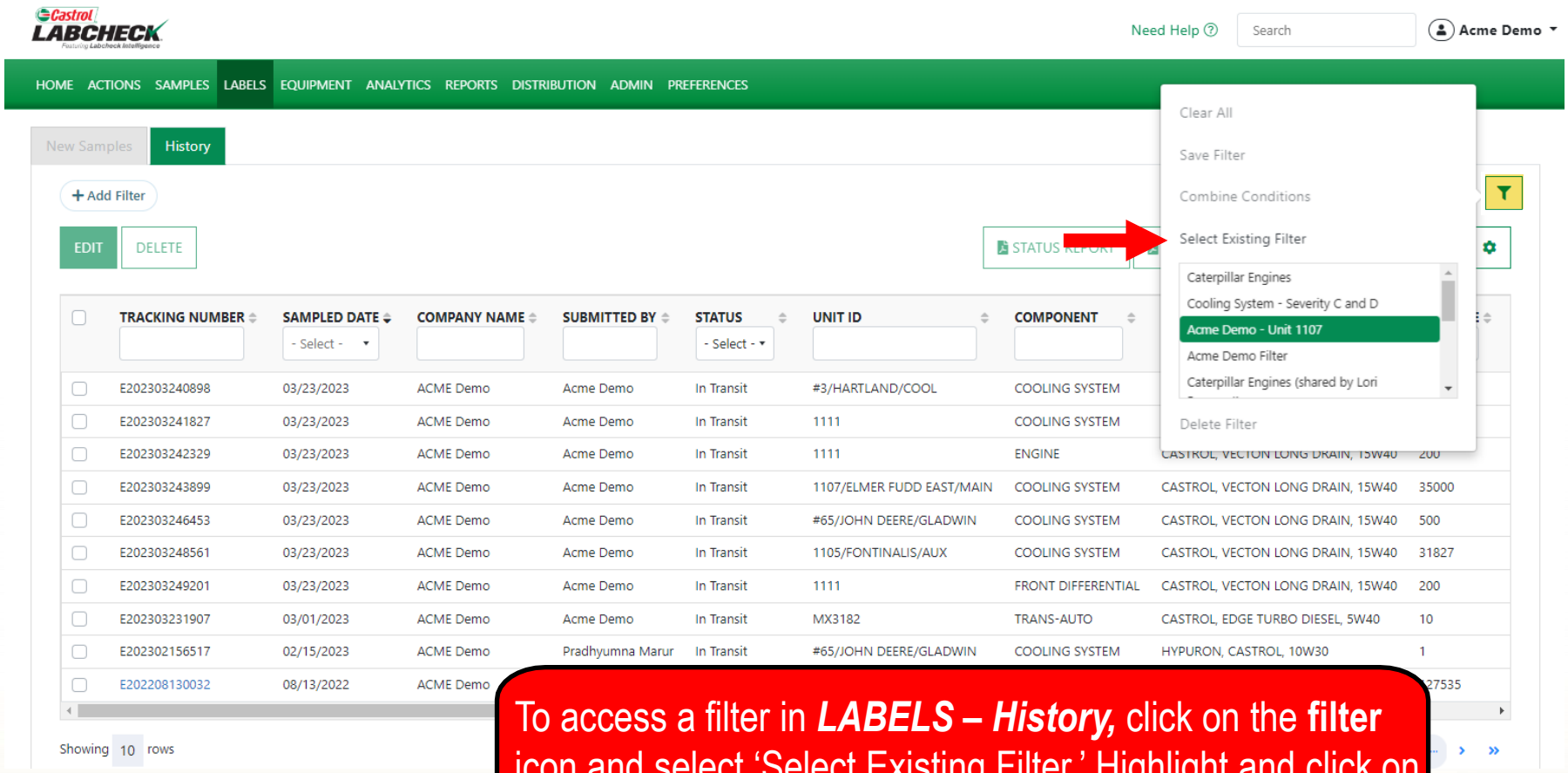
To save your filter properties, click the **filter** icon and select ‘Save Filter.’
Enter the filter name and click the ✓.

FILTERS ON THE EQUIPMENT TAB



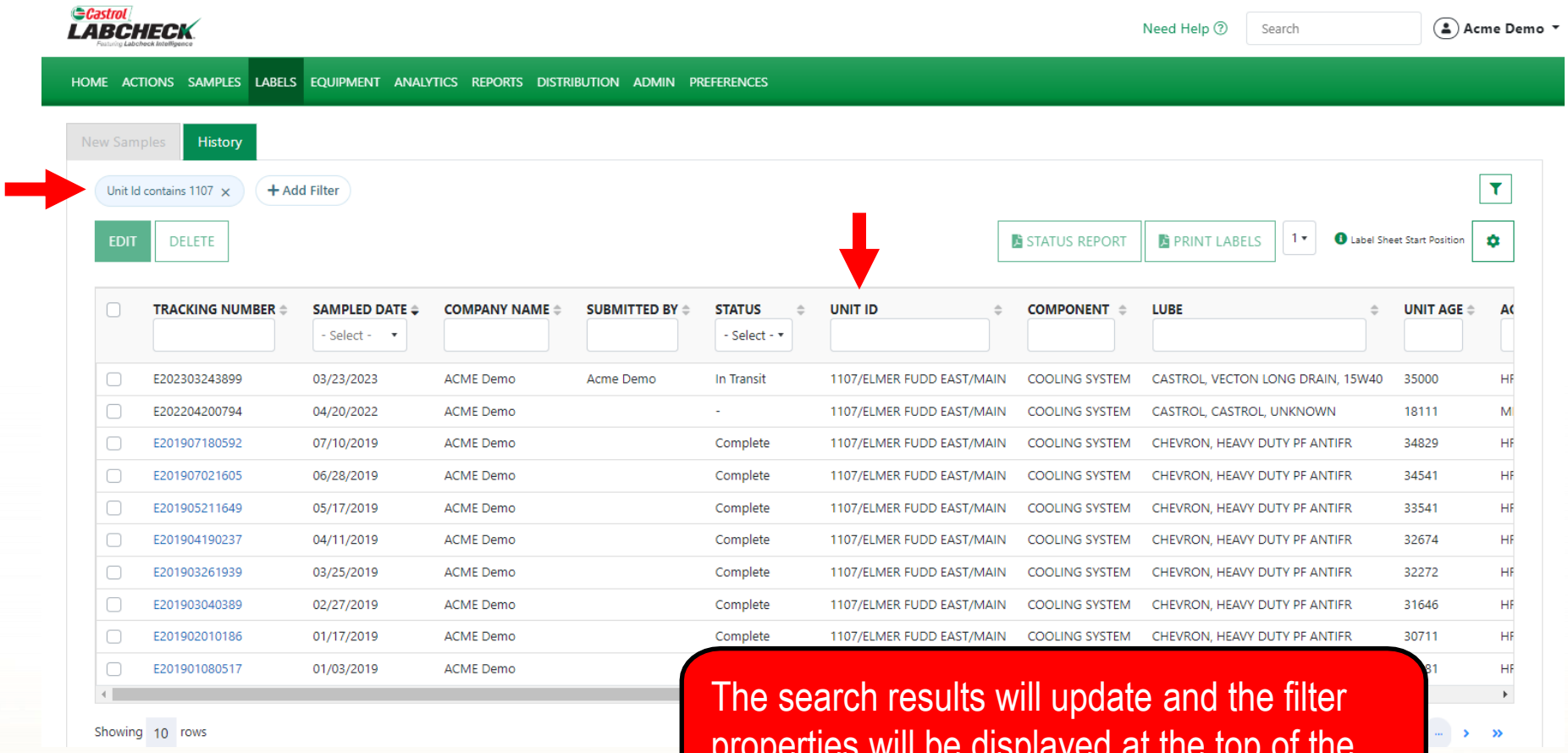
To remove the filter, select the ‘x’ at the end of each filter property or simply click on the **filter** icon and select ‘Clear All.’

FILTERS ON THE LABELS TAB



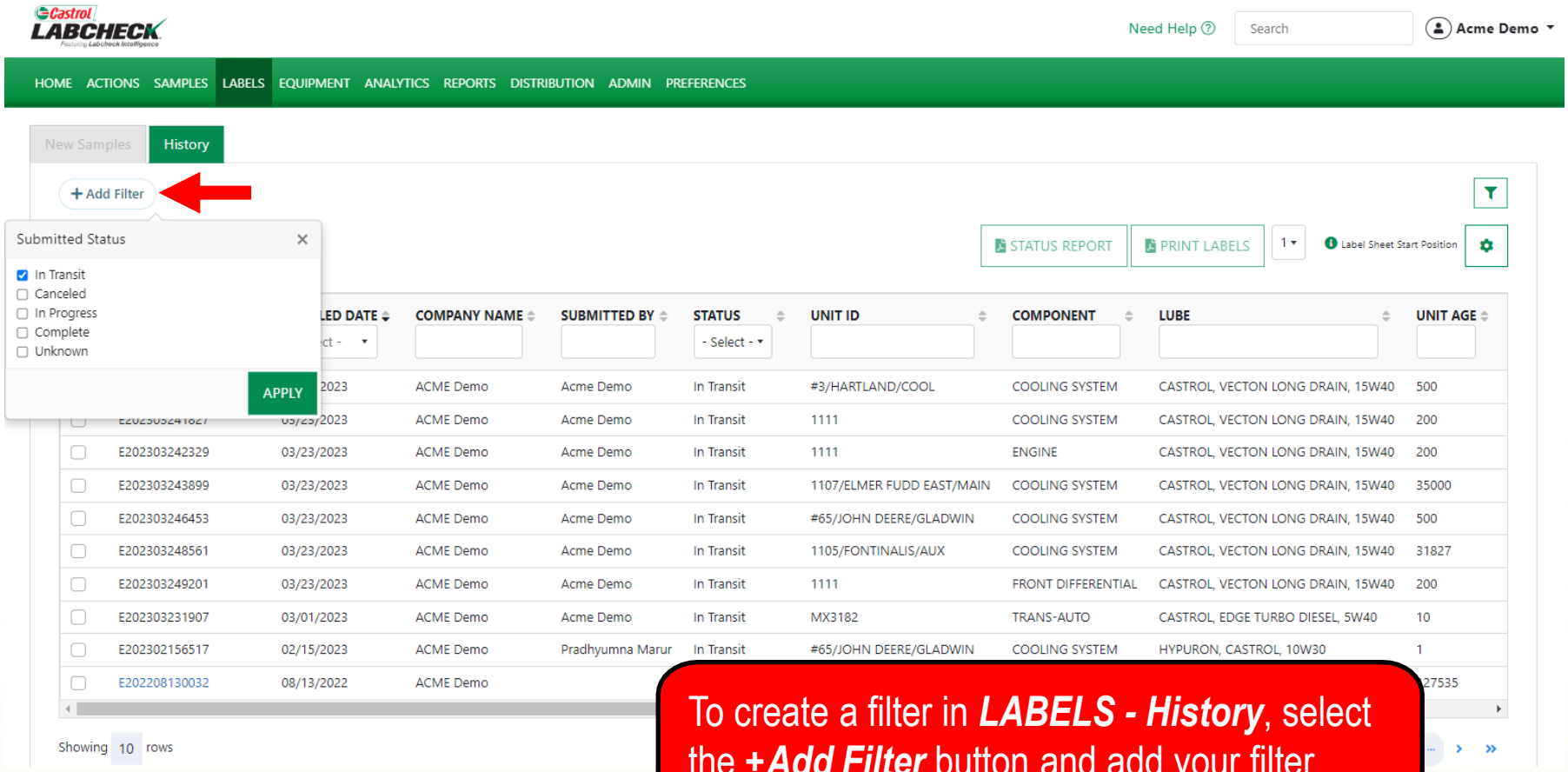
To access a filter in ***LABELS – History,*** click on the **filter** icon and select 'Select Existing Filter.' Highlight and click on the desired filter.

FILTERS ON THE LABELS TAB



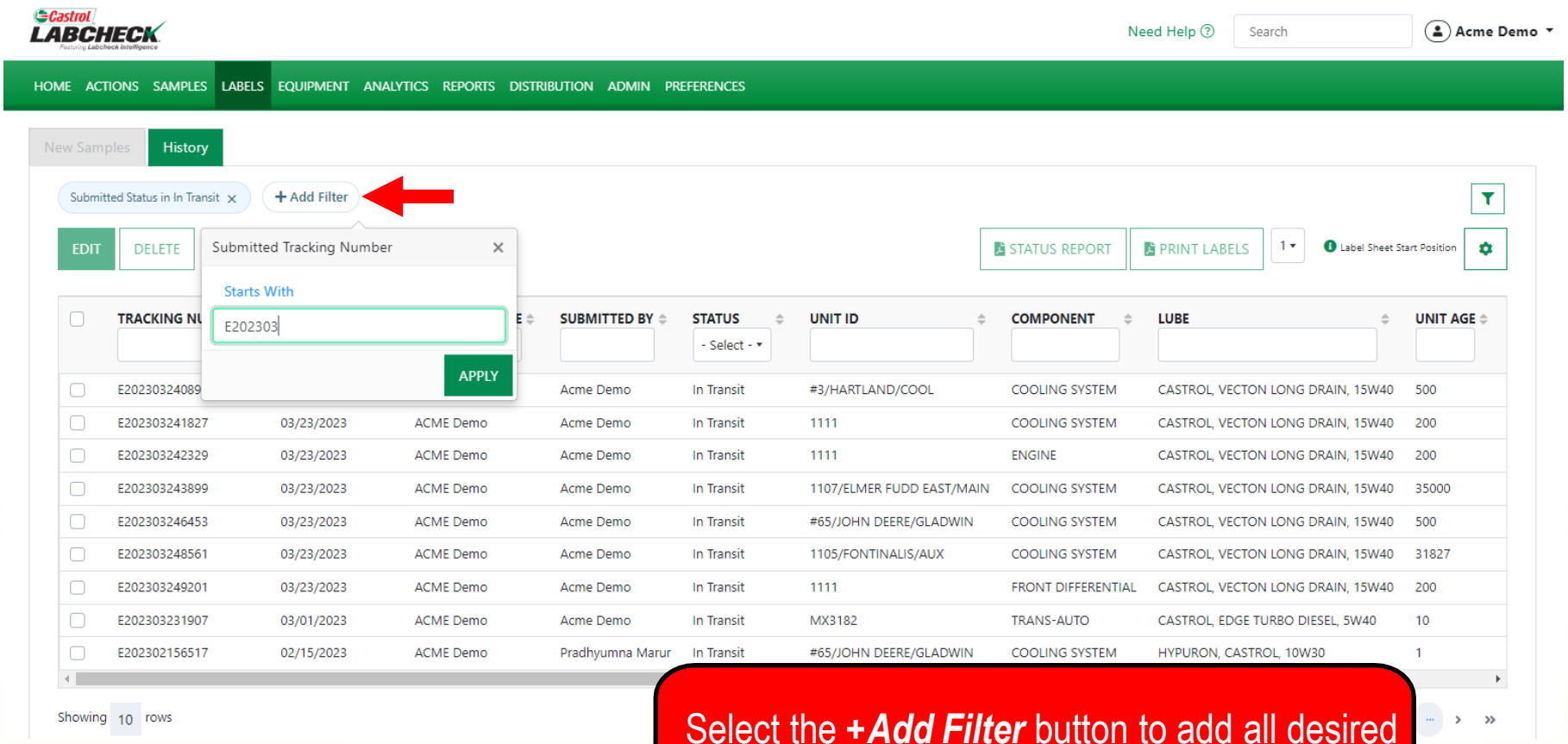
The search results will update and the filter properties will be displayed at the top of the page.

FILTERS ON THE LABELS TAB



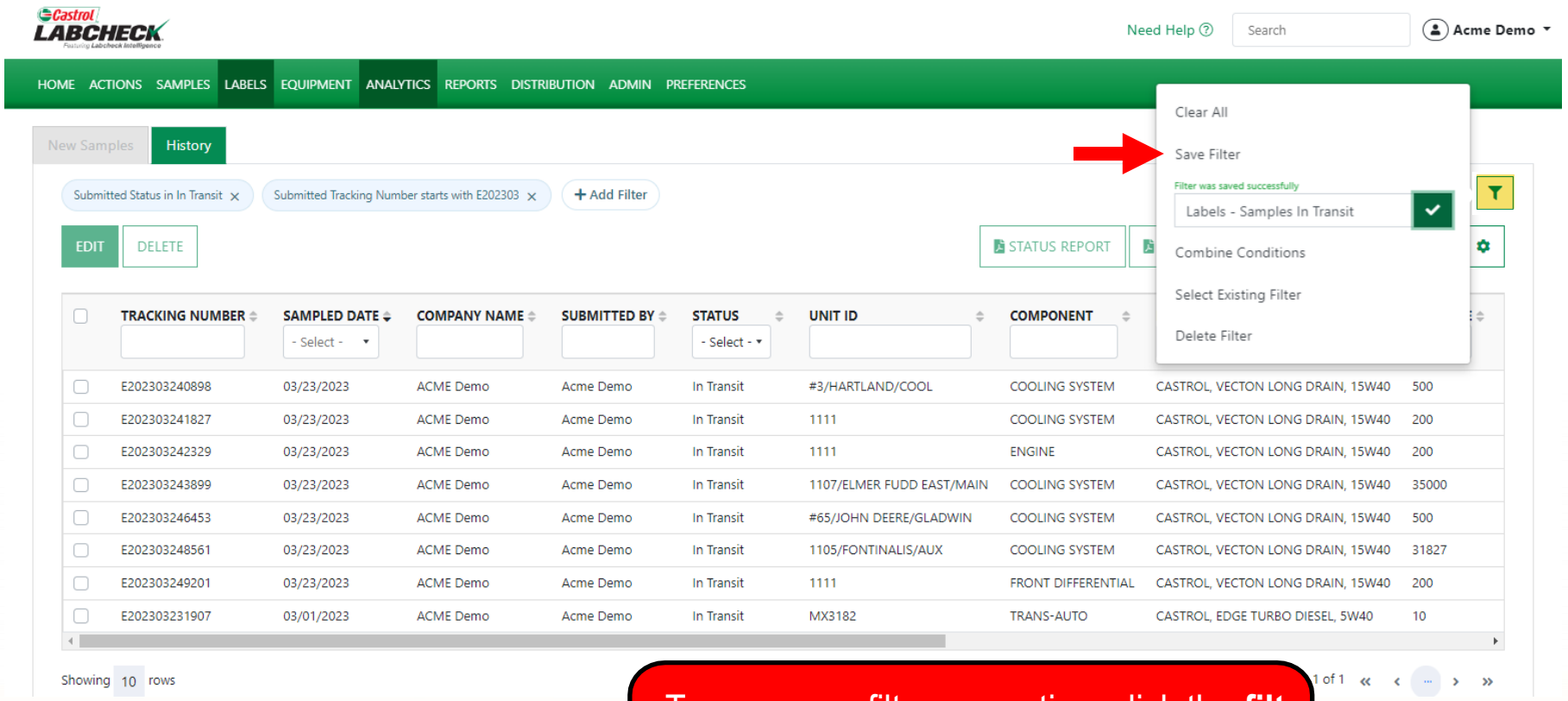
To create a filter in ***LABELS - History***, select the ***+Add Filter*** button and add your filter properties.

FILTERS ON THE LABELS TAB



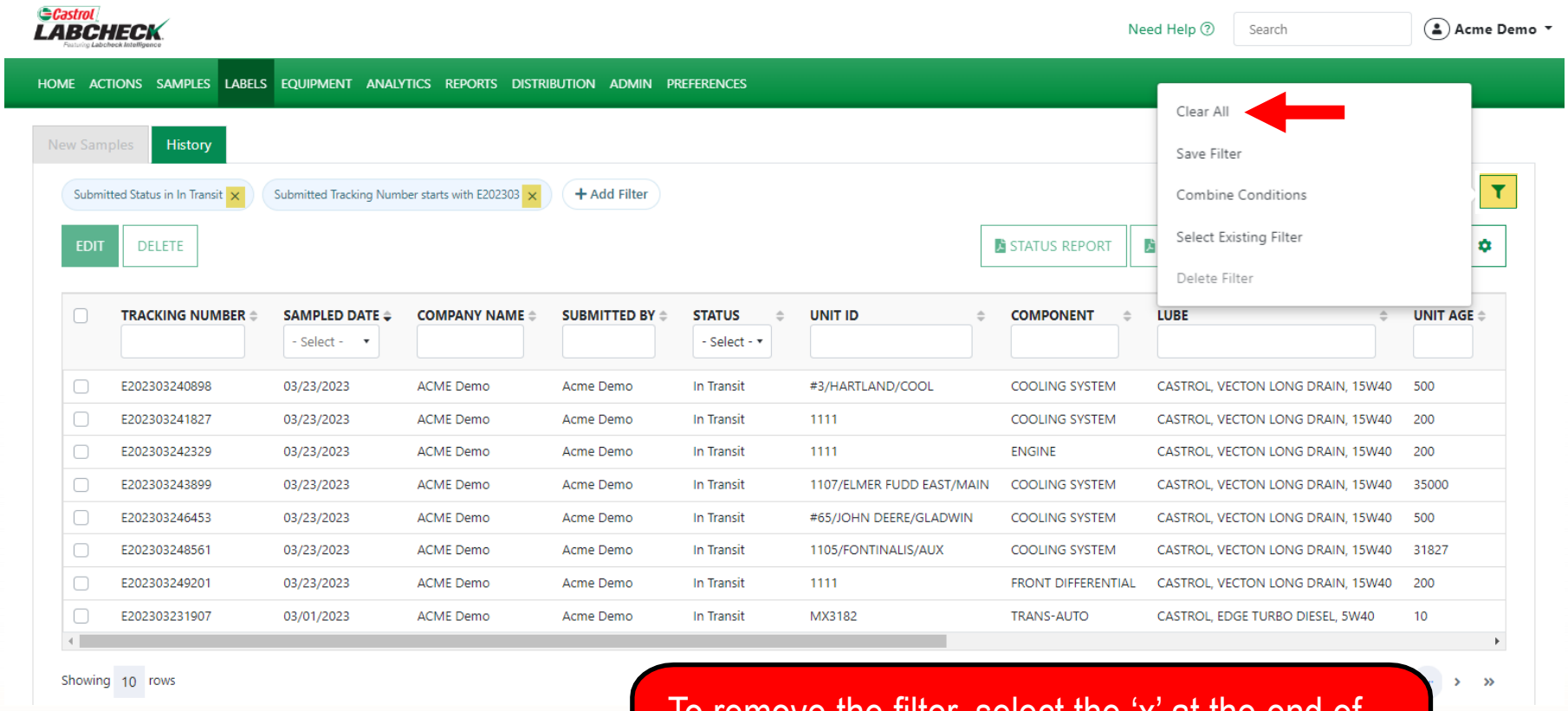
Select the ***+Add Filter*** button to add all desired filter properties.

FILTERS ON THE LABELS TAB



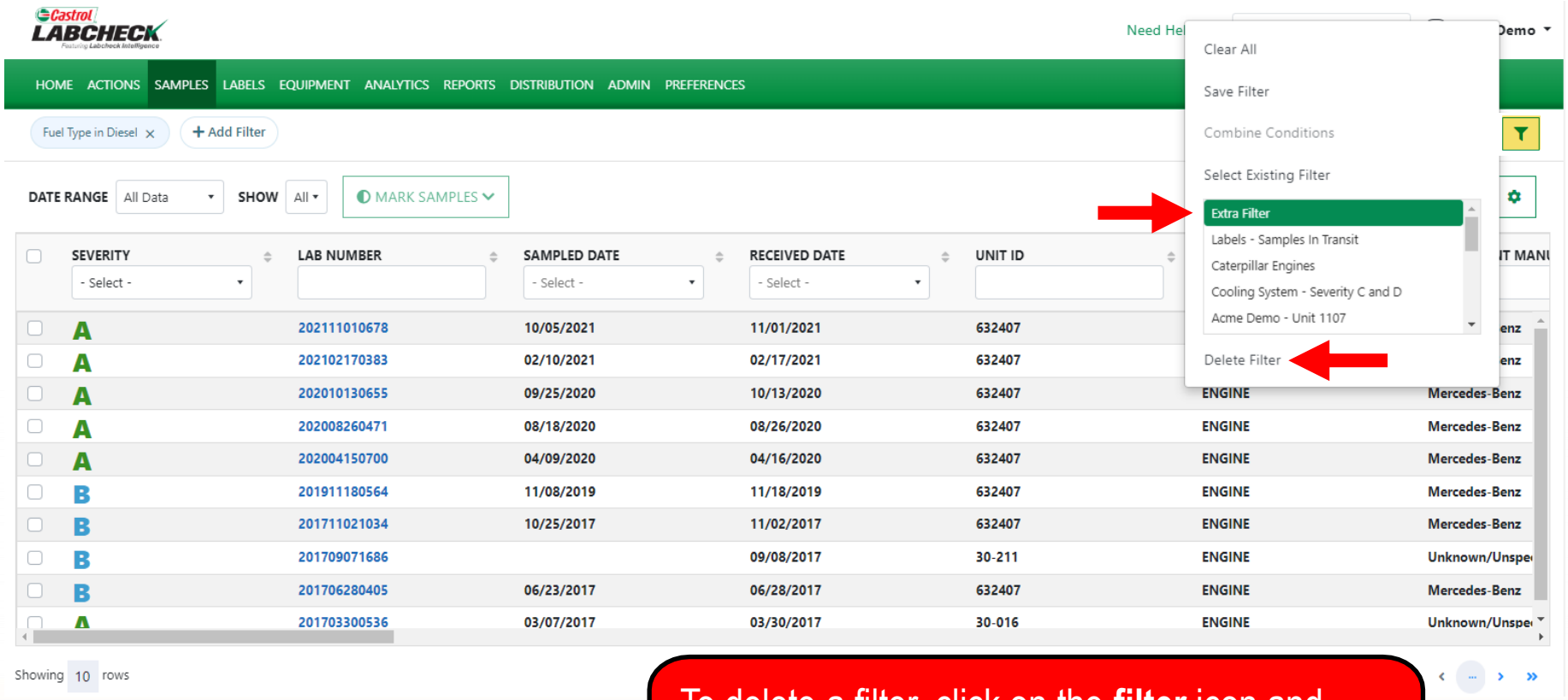
To save your filter properties, click the **filter** icon and select 'Save Filter.'
Enter the filter name and click the ✓.

FILTERS ON THE LABELS TAB



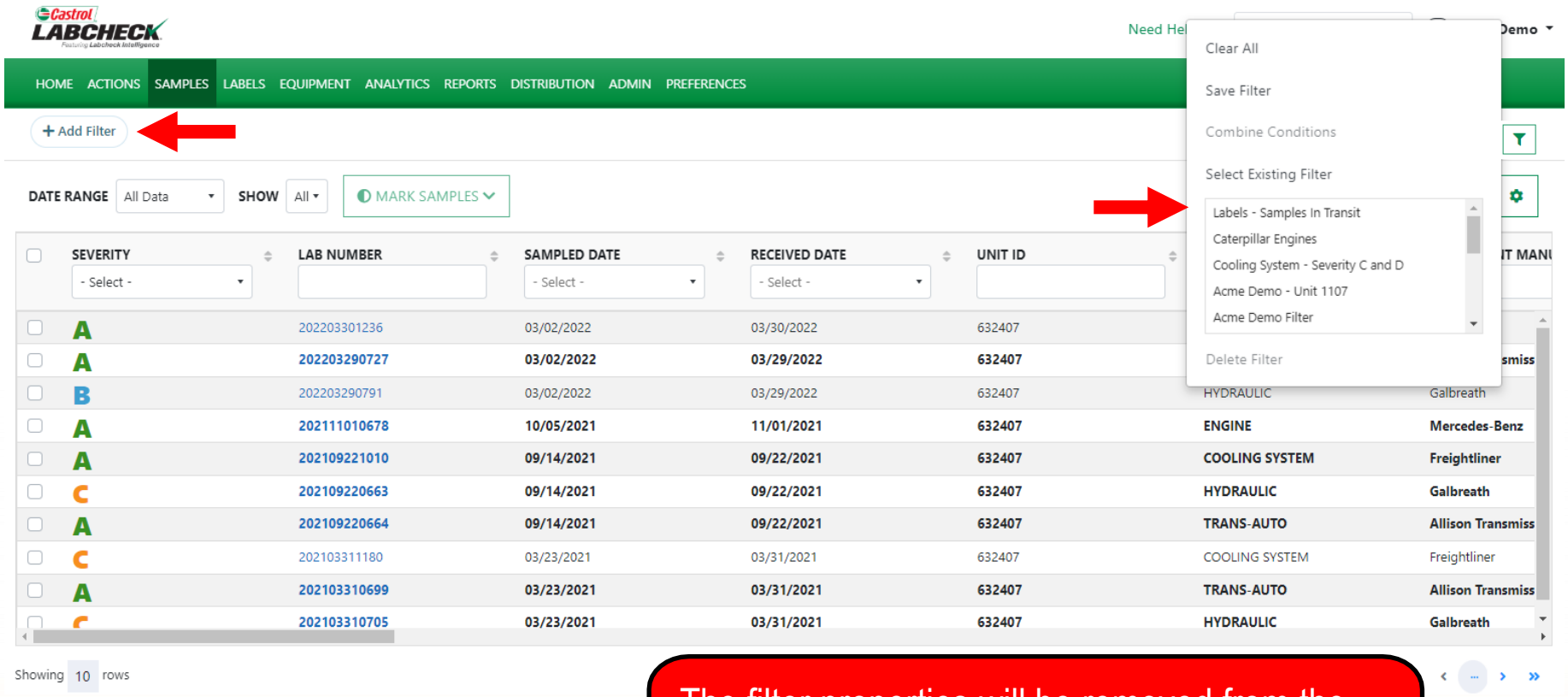
To remove the filter, select the ‘x’ at the end of each filter property or simply click on the **filter** icon and select ‘Clear All.’

DELETE A FILTER



To delete a filter, click on the **filter** icon and select the 'Select Existing Filter.' Highlight the filter and then click on 'Delete Filter'

DELETE A FILTER



	SEVERITY	LAB NUMBER	SAMPLED DATE	RECEIVED DATE	UNIT ID		
	A	202203301236	03/02/2022	03/30/2022	632407		
	A	202203290727	03/02/2022	03/29/2022	632407		
	B	202203290791	03/02/2022	03/29/2022	632407	HYDRAULIC	Galbreath
	A	202111010678	10/05/2021	11/01/2021	632407	ENGINE	Mercedes-Benz
	A	202109221010	09/14/2021	09/22/2021	632407	COOLING SYSTEM	Freightliner
	C	202109220663	09/14/2021	09/22/2021	632407	HYDRAULIC	Galbreath
	A	202109220664	09/14/2021	09/22/2021	632407	TRANS-AUTO	Allison Transmiss
	C	202103311180	03/23/2021	03/31/2021	632407	COOLING SYSTEM	Freightliner
	A	202103310699	03/23/2021	03/31/2021	632407	TRANS-AUTO	Allison Transmiss
	C	202103310705	03/23/2021	03/31/2021	632407	HYDRAULIC	Galbreath

The filter properties will be removed from the page and the filter will be deleted from the list of existing filters.

Castrol LABCHECK
Featuring Labcheck Intelligence

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