QUICK START GUIDE

MY FILTERS

Learn:

1. **What Filters Are & Their Functionality**
2. **How to Create a Filter**
3. **How to Copy a Filter**
4. **How to Modify or Delete a Filter**

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.

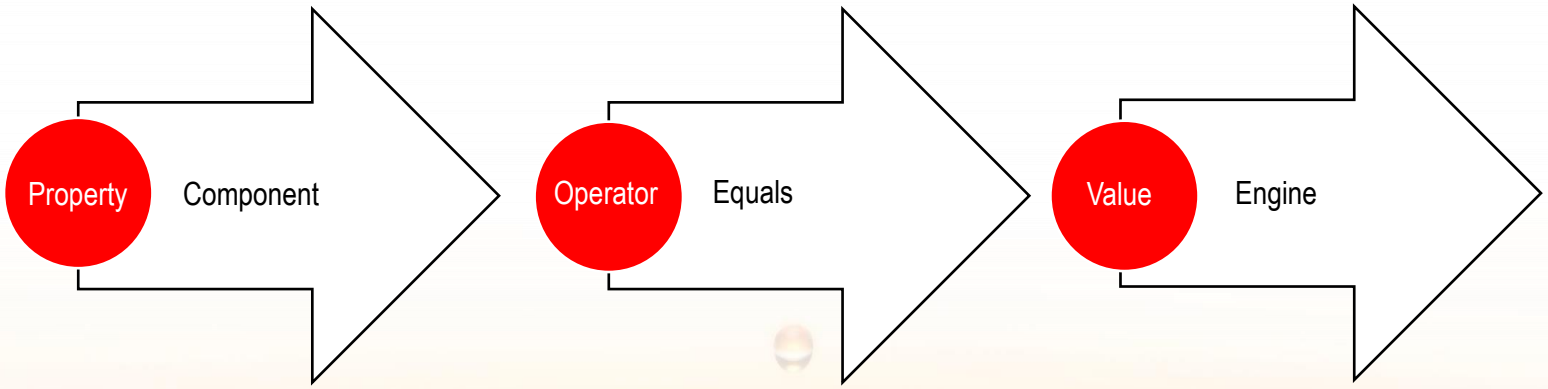
SAMPLES	EQUIPMENT	LABELS	REPORTS
Customer Name Customer Worksite City / State / Zip Unit ID Unit Worksite Unit Make Unit Model Component Type Component Make Component Model Component Reference Number Sample Condition Oil Manufacturer Oil Brand Oil Grade	Customer Worksite Unit ID Unit Manufacturer Unit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

FILTER OPERATORS

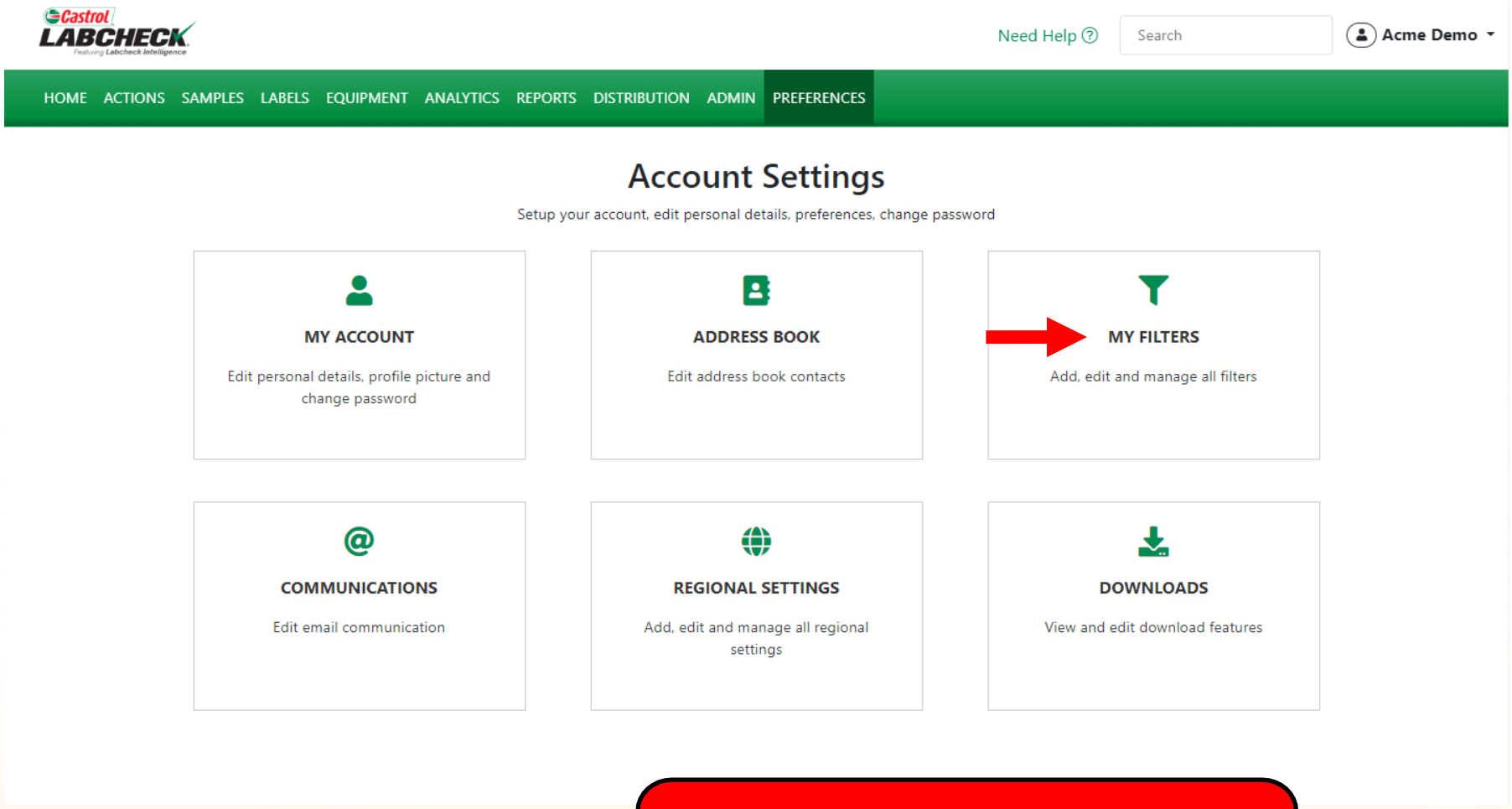
Equals	Will only display results that match the exact value input for the given property
Not equals	Will only display results that do not match the exact value input for the given property
Starts with	Will only display results that begin with the value input for the given property
Contains	Will only 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. Screenshots of this example are included in the next slides.

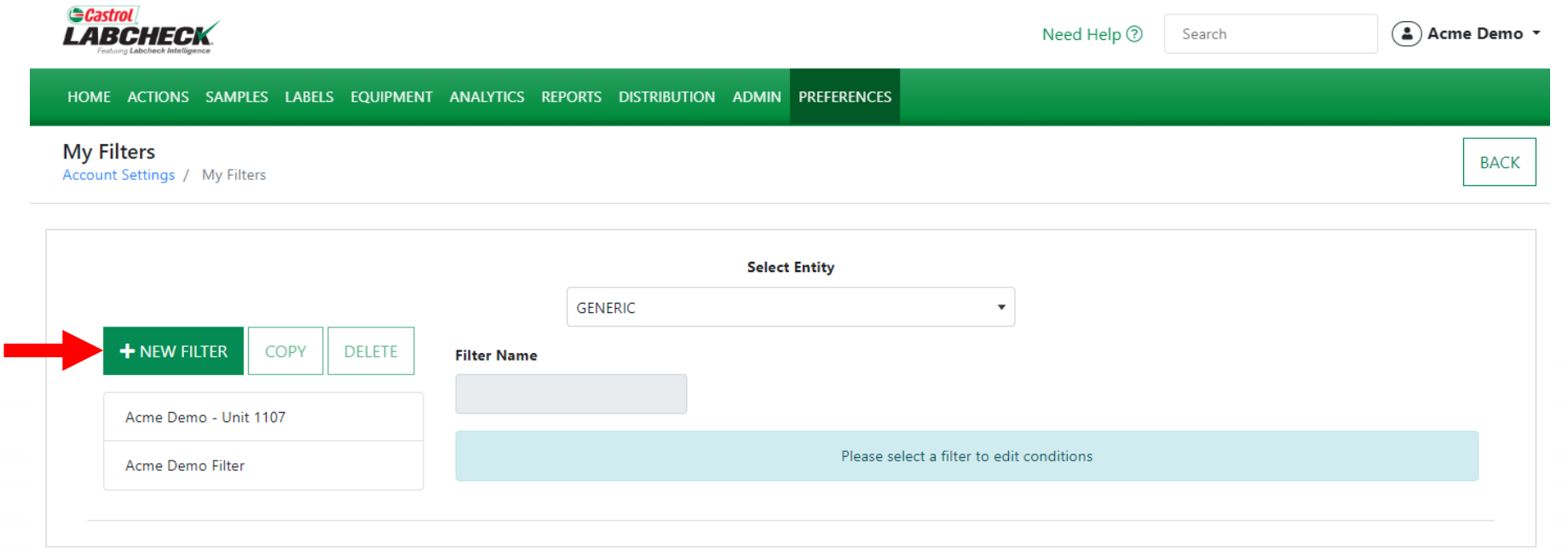


ACCESSING FILTERS



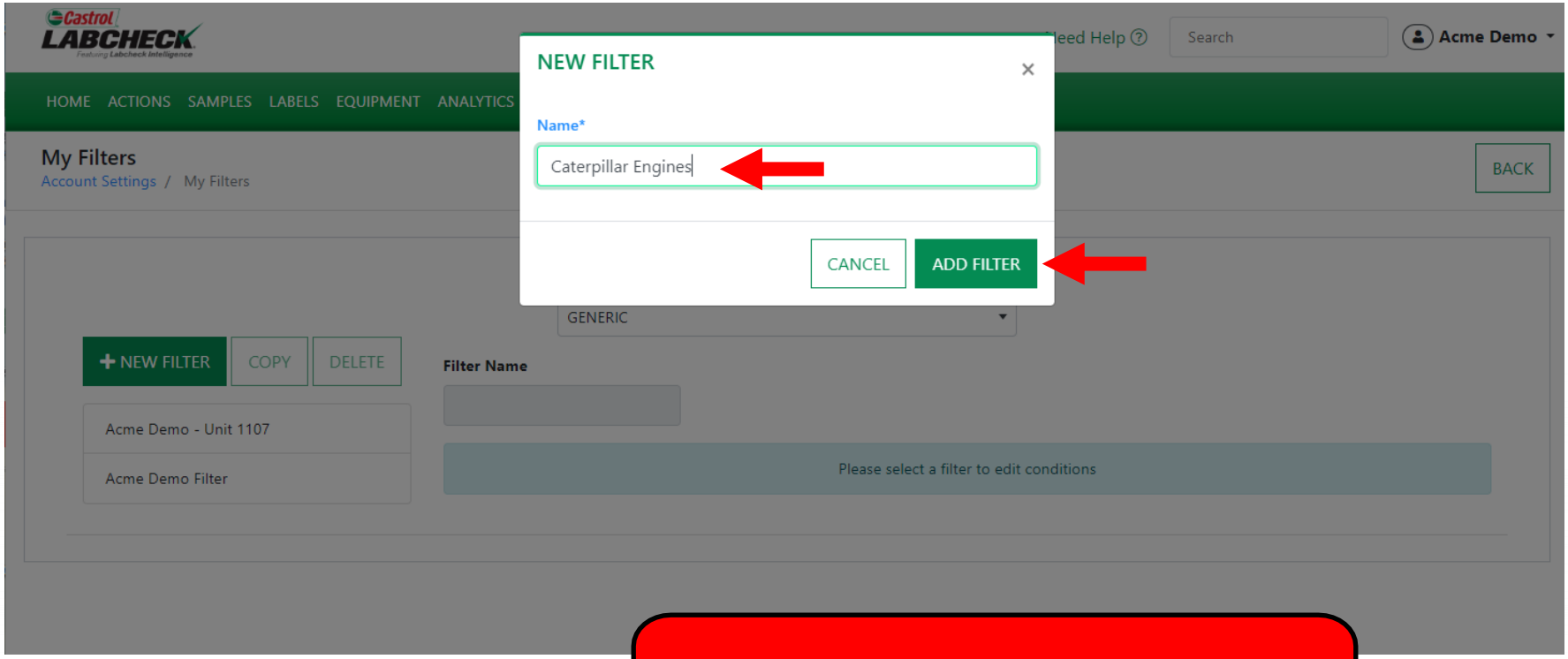
To access MY FILTERS, click on the ***PREFERENCES*** tab and select the MY FILTERS tile.

CREATE A FILTER



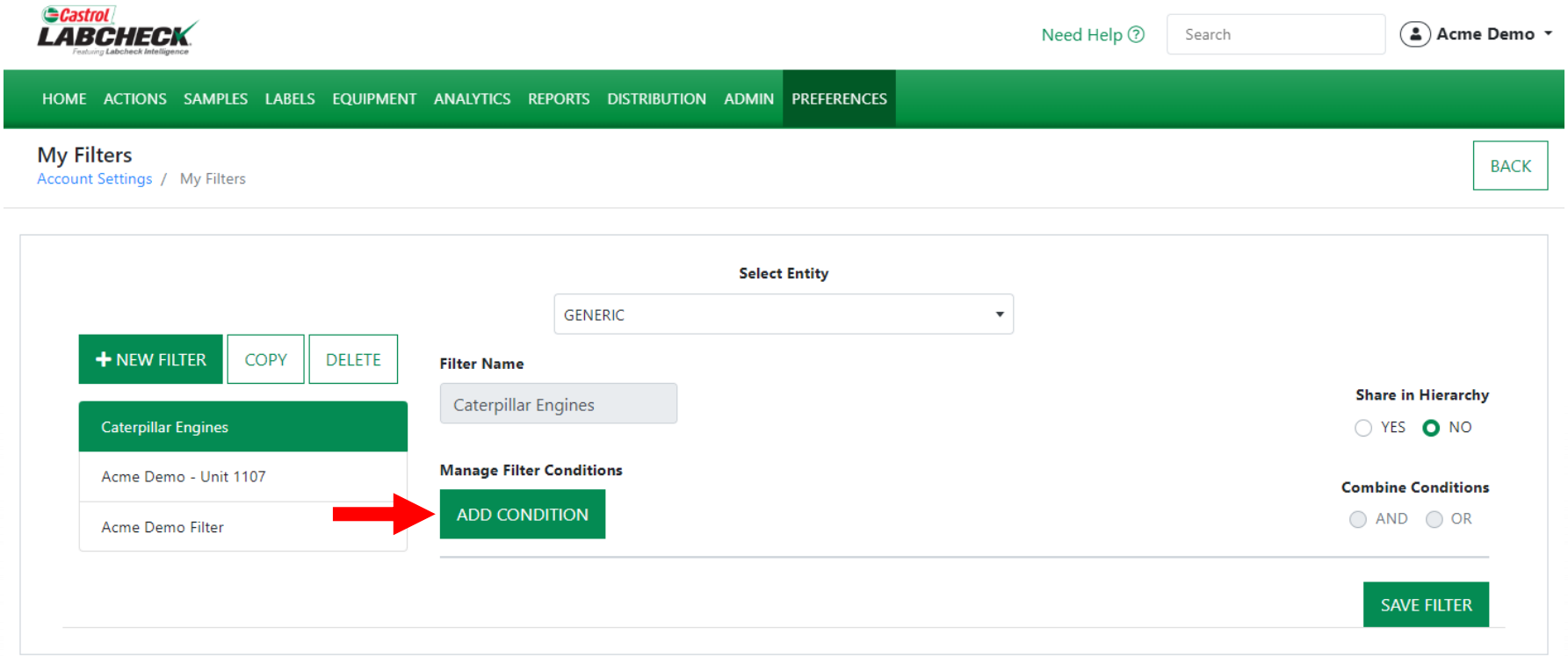
Click on the ***+NEW FILTER*** button to start creating your new filter.

CREATE A FILTER



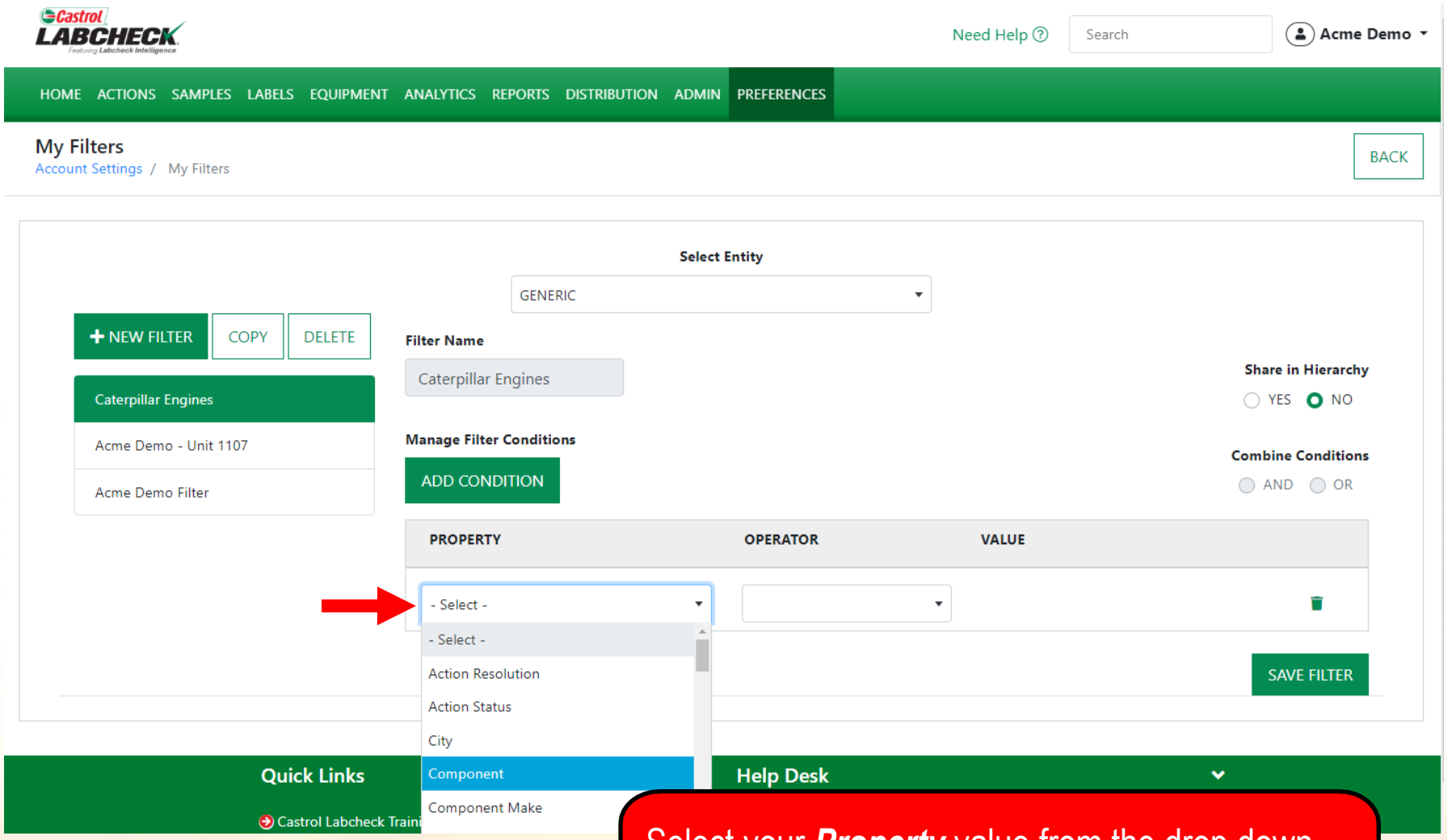
Enter a ***Name*** for your Filter and click on the ***ADD FILTER*** button.

CREATE A FILTER



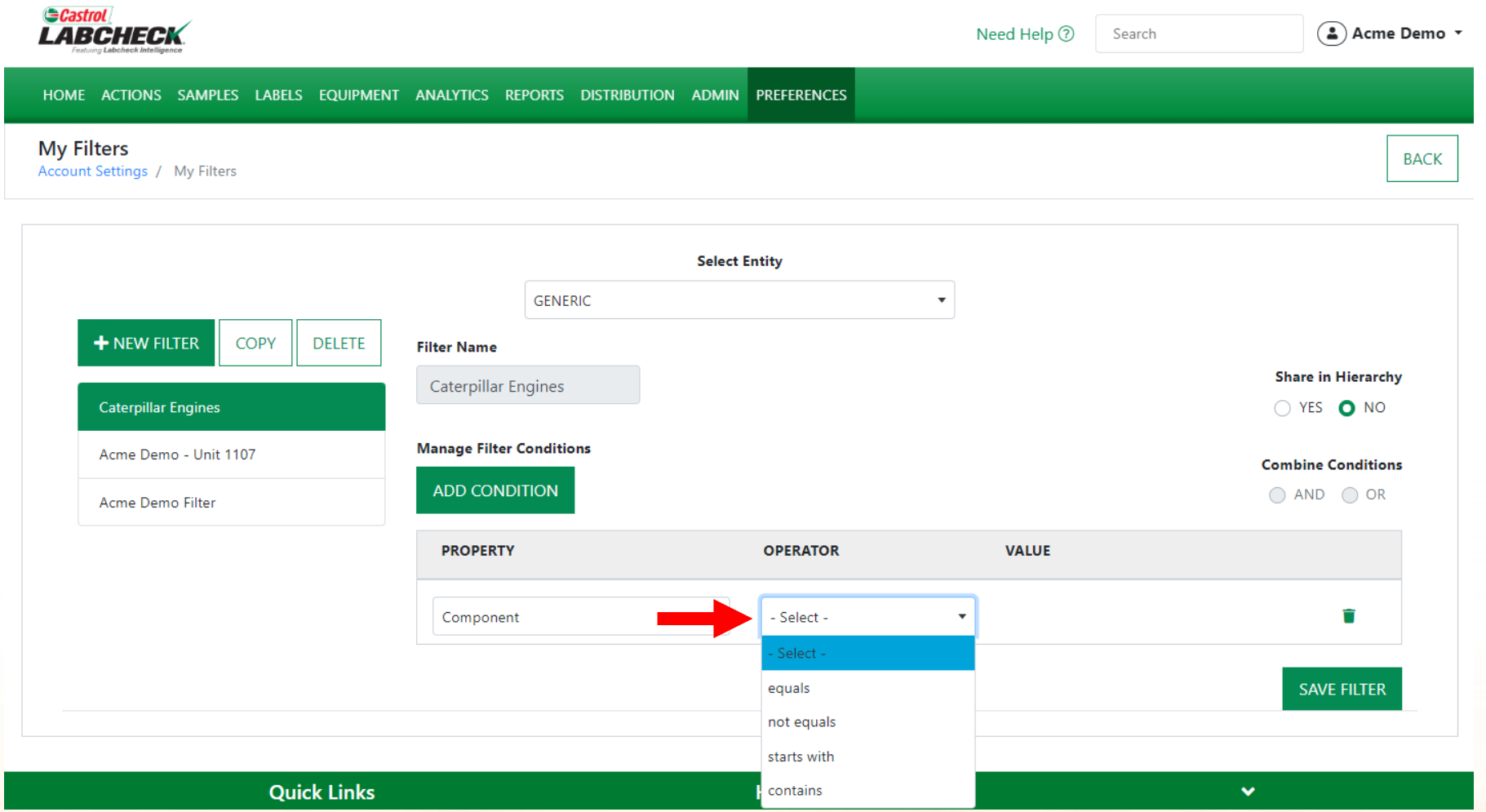
Click on the ***ADD CONDITION*** button to add a condition to your filter.

CREATE A FILTER



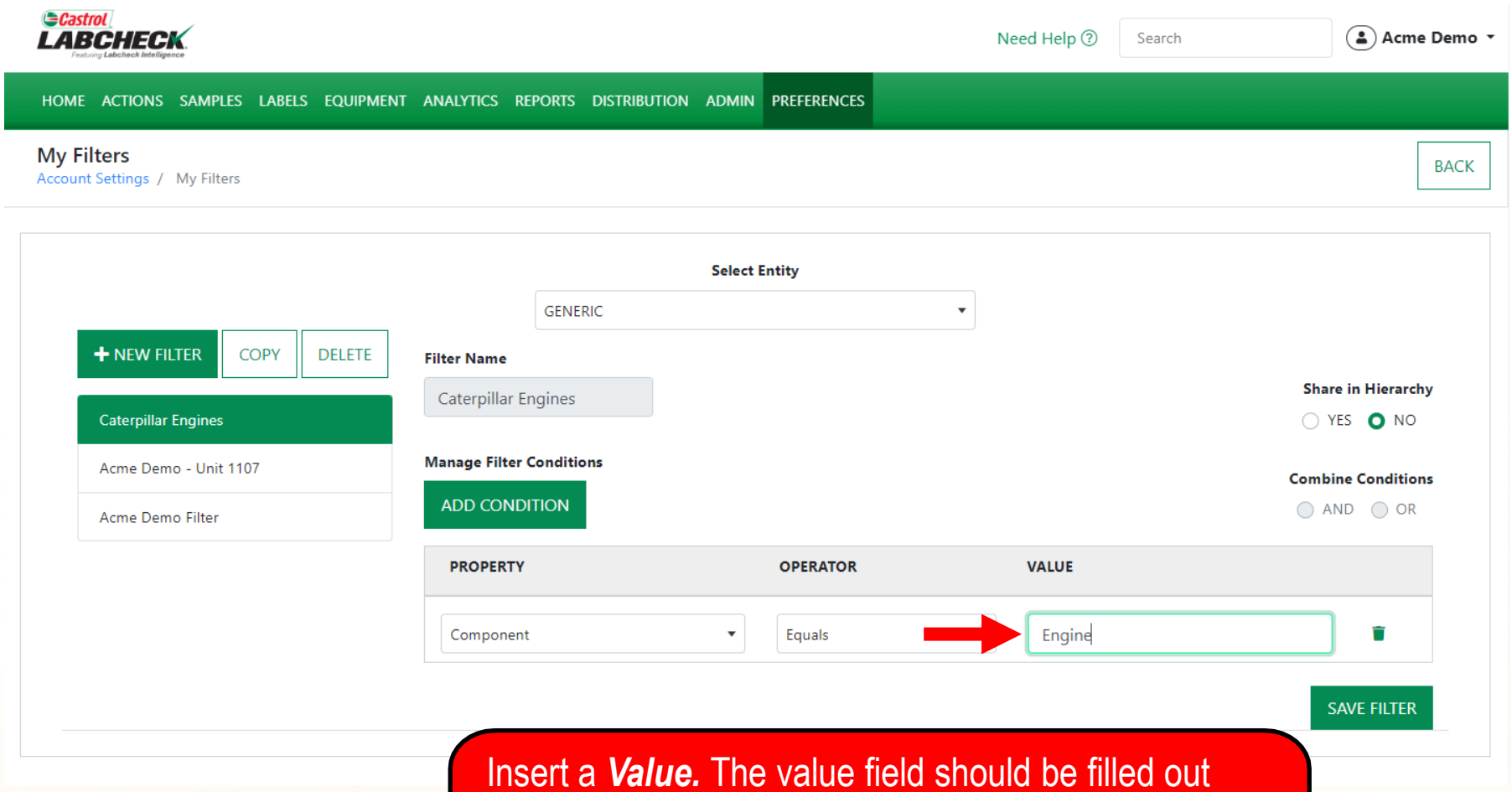
Select your ***Property*** value from the drop down list. Properties are the item(s) that you want to search for. Ex: Unit ID, Unit Make, Unit Model

CREATE A FILTER



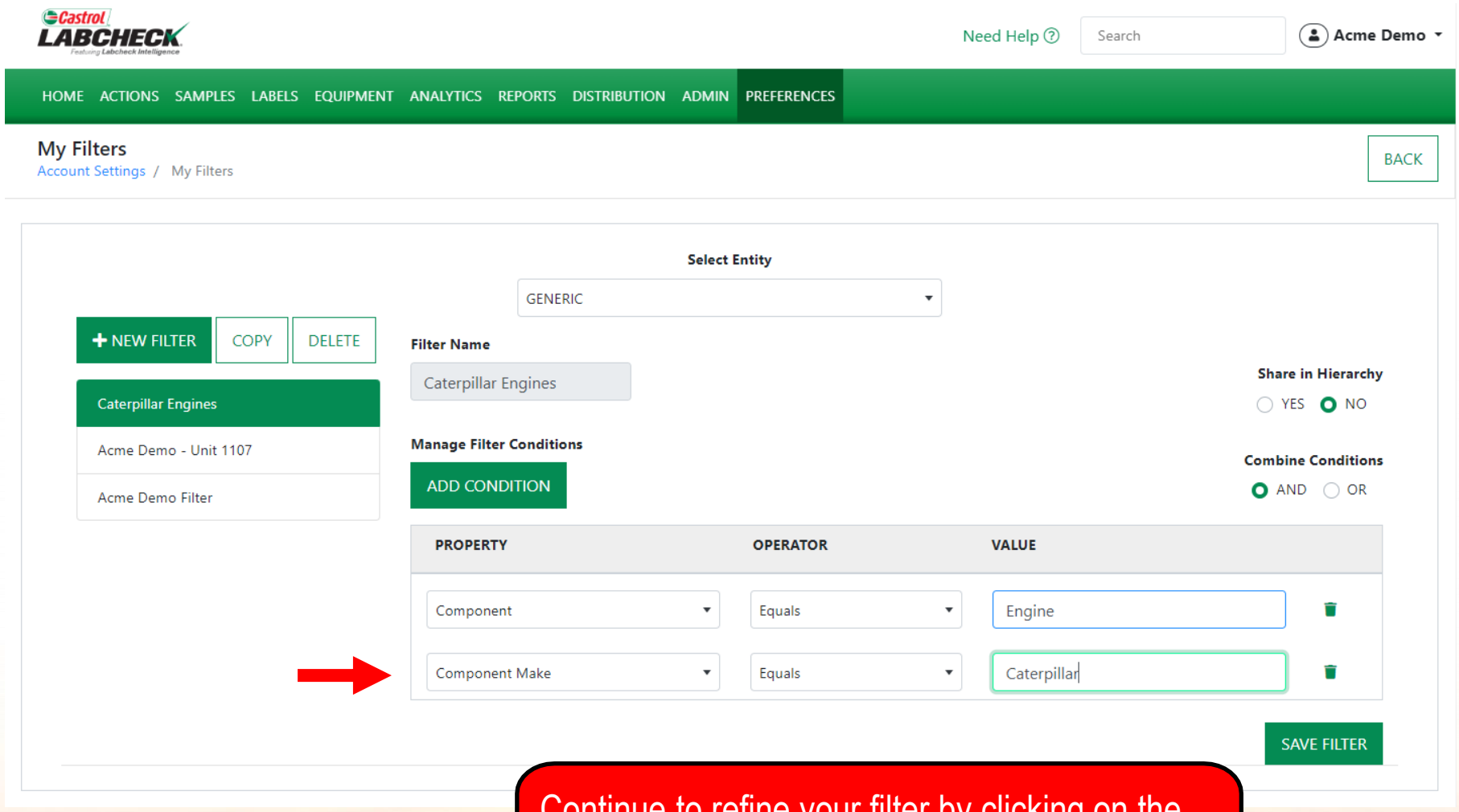
Select your ***Operator*** from the drop down list. Operator means how you want the filter search to display. Ex. 'Equals' will match the characters entered in the value field verbatim.

CREATE A FILTER



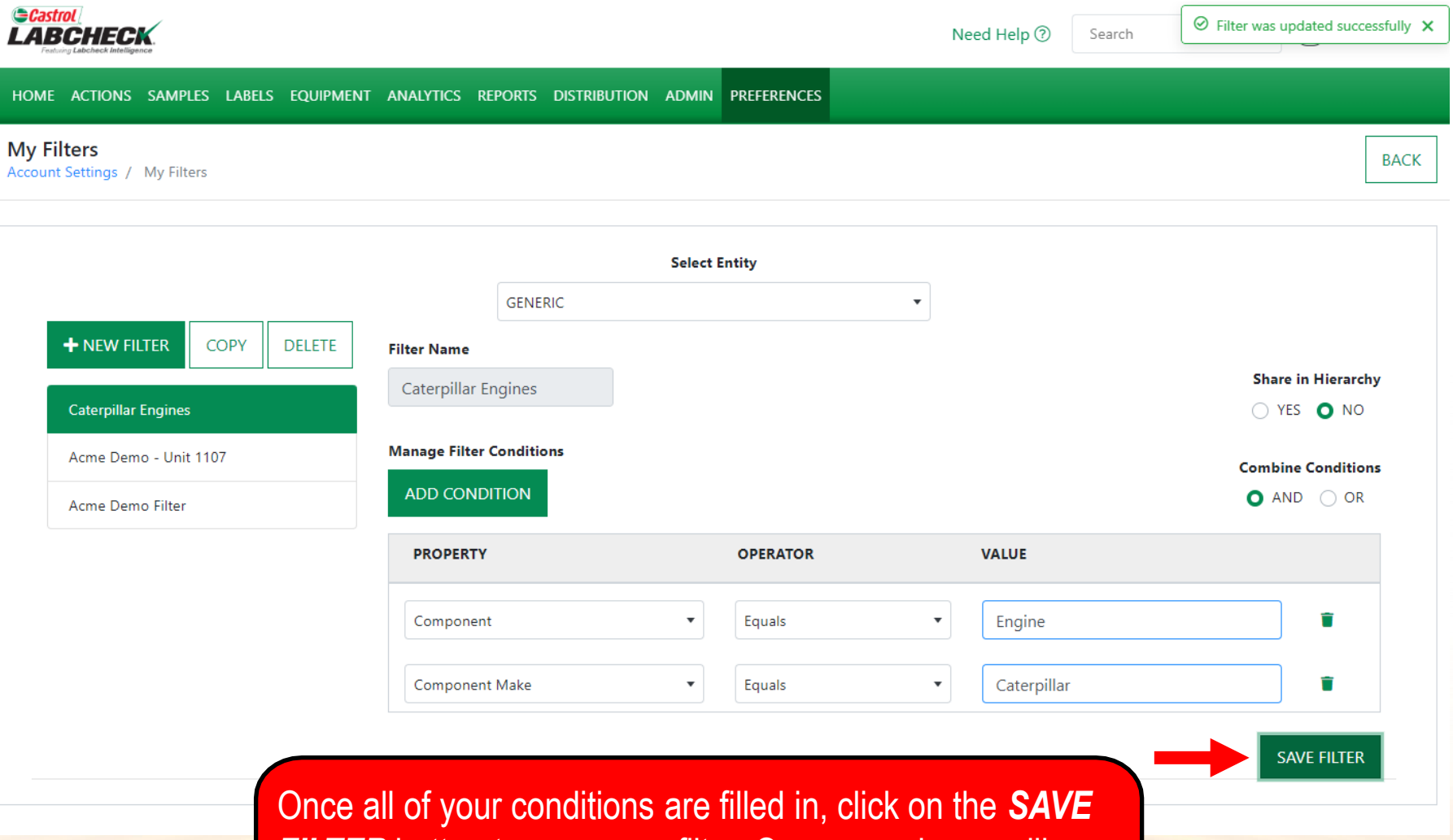
Insert a ***Value.*** The value field should be filled out based on what property you selected. In this example, because Component is the property and the type is Equals, this filter will pull up all engine components.

CREATE A FILTER



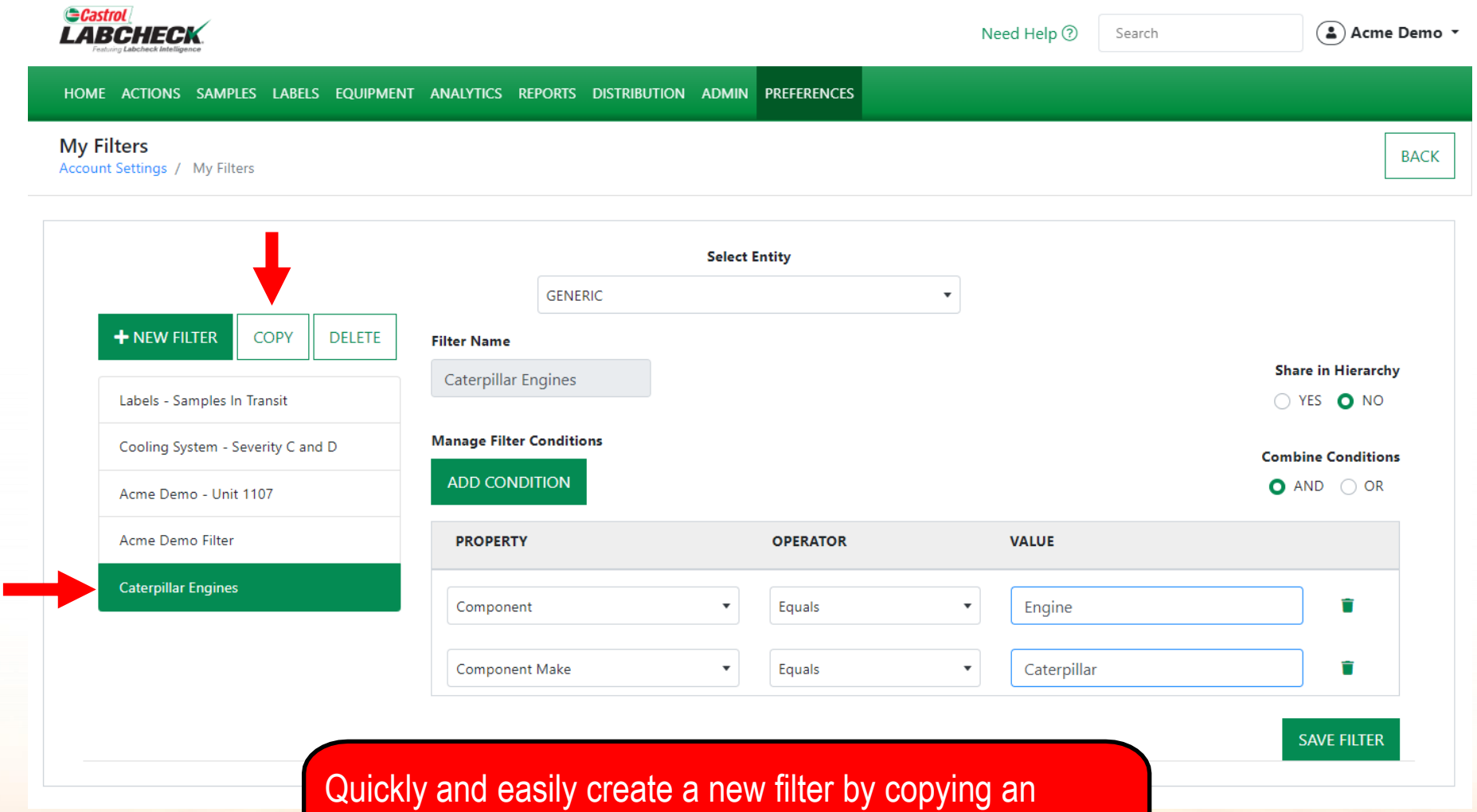
Continue to refine your filter by clicking on the ***ADD CONDITION*** button and adding more conditions.

CREATE A FILTER



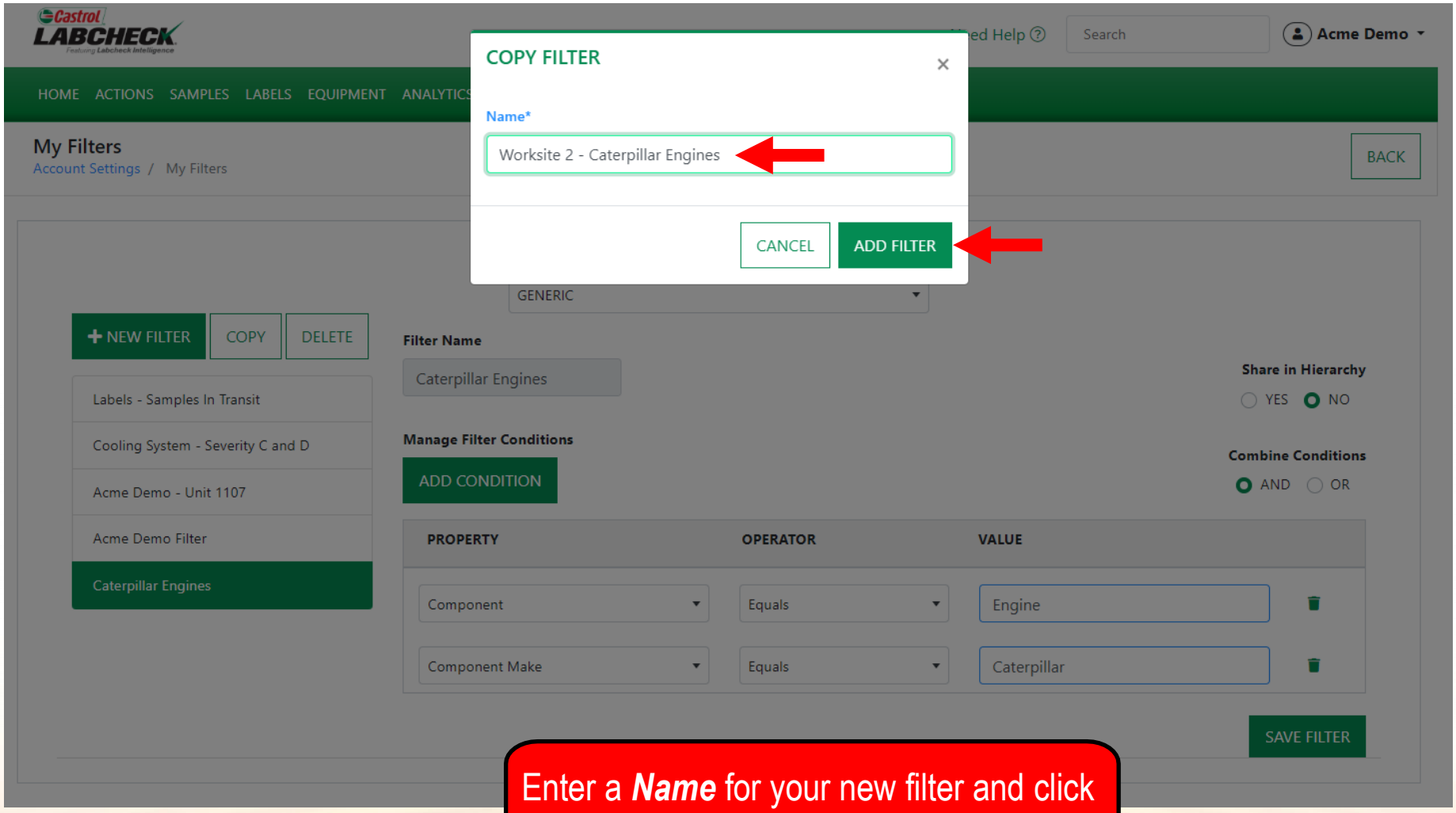
Once all of your conditions are filled in, click on the ***SAVE FILTER*** button to save your filter. Once saved, you will see a confirmation message at the top and your filter will appear in the list on the left.

COPY A FILTER



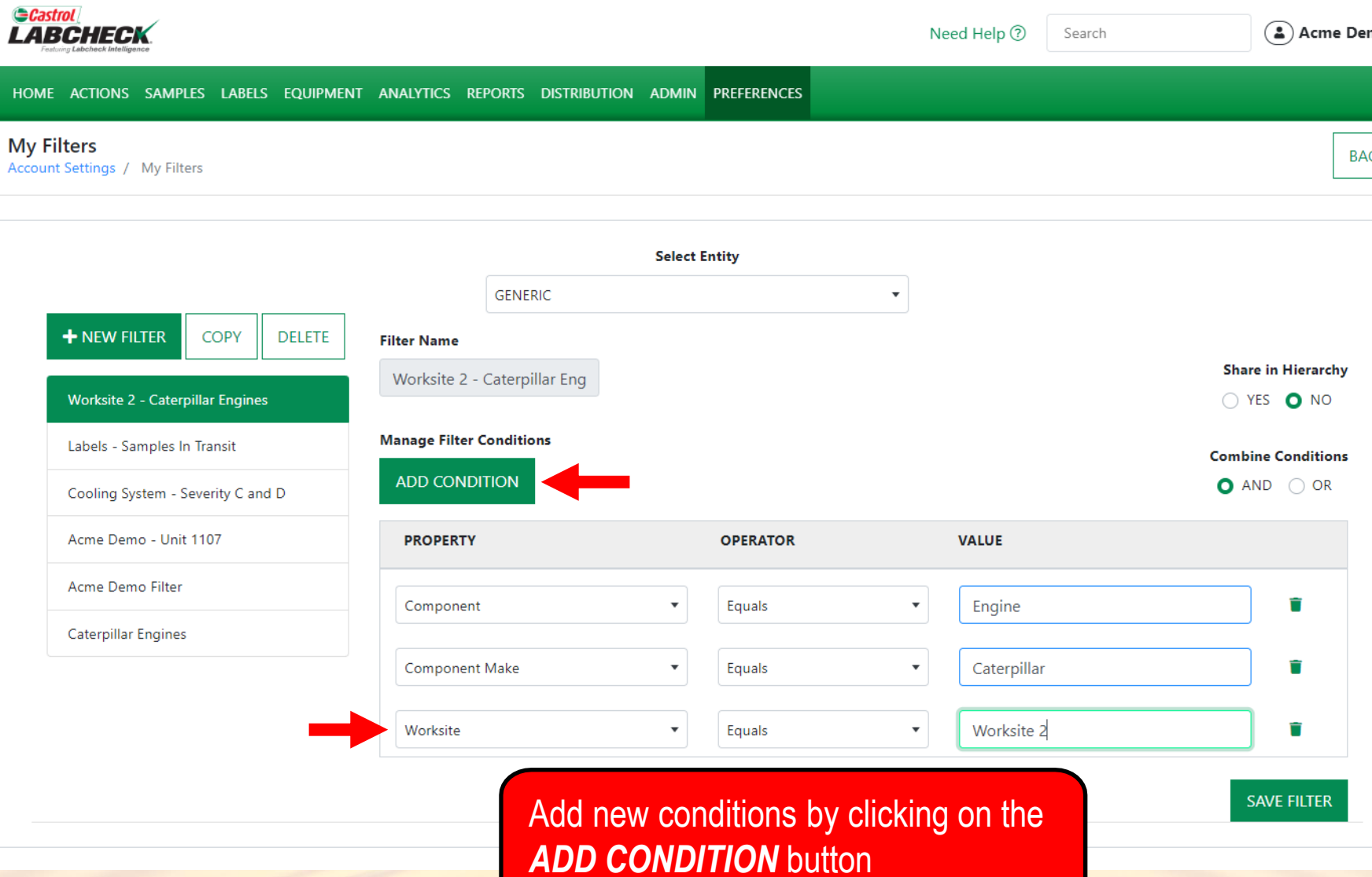
Quickly and easily create a new filter by copying an existing one. Simply select the desired filter from the list and click on the ***COPY*** button.

COPY A FILTER



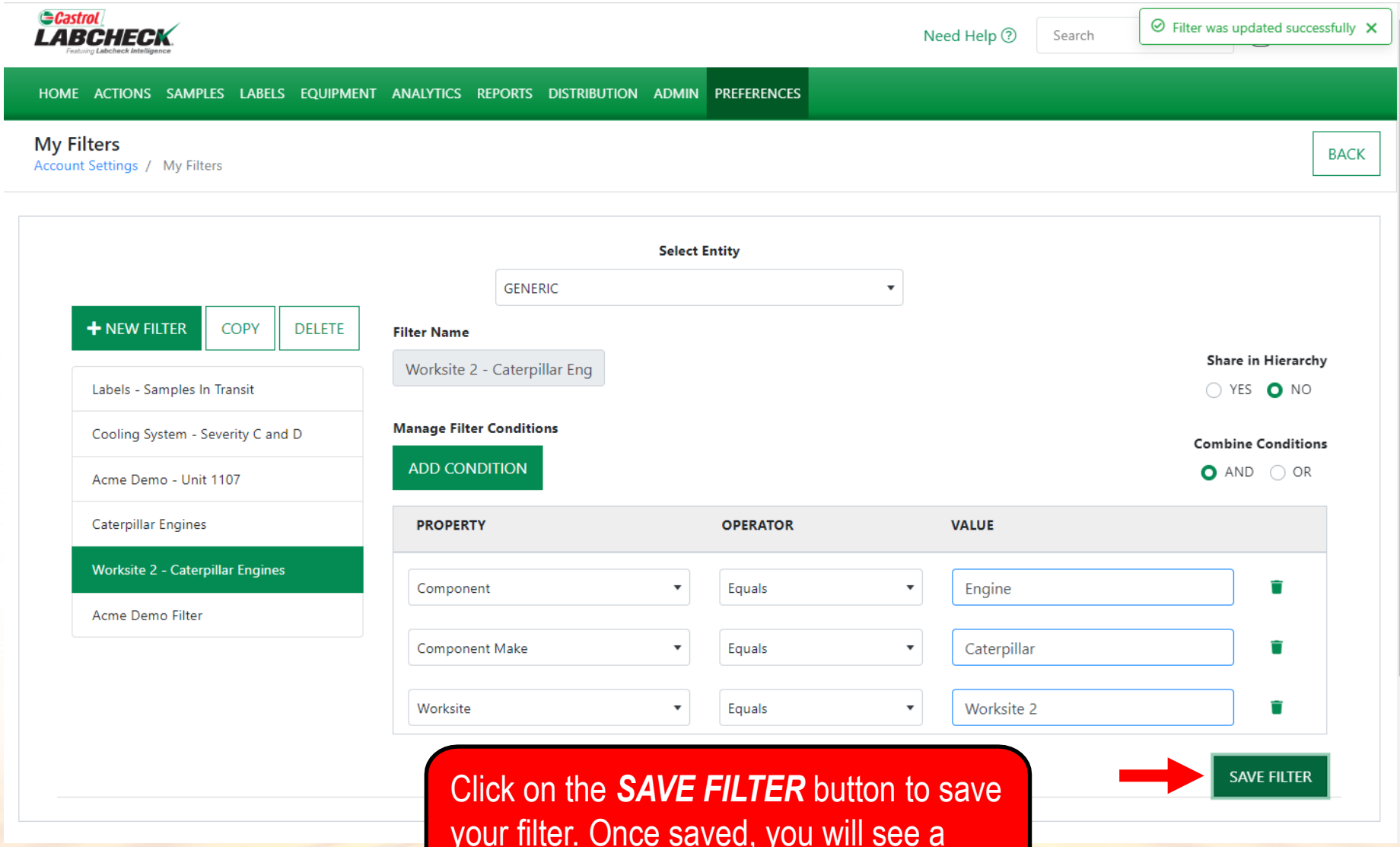
Enter a ***Name*** for your new filter and click the ***ADD FILTER*** button.

COPY A FILTER



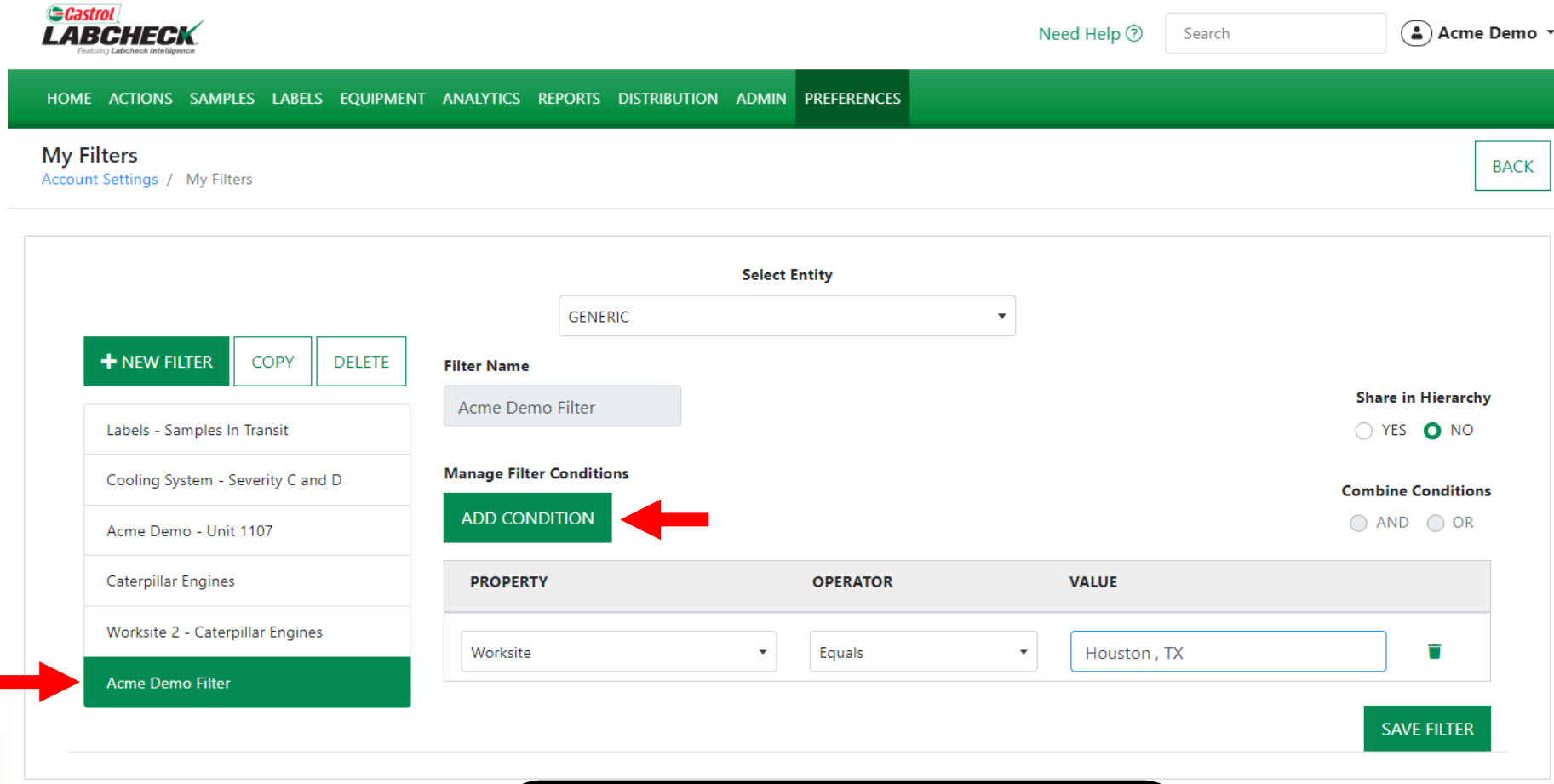
Add new conditions by clicking on the ***ADD CONDITION*** button

COPY A FILTER



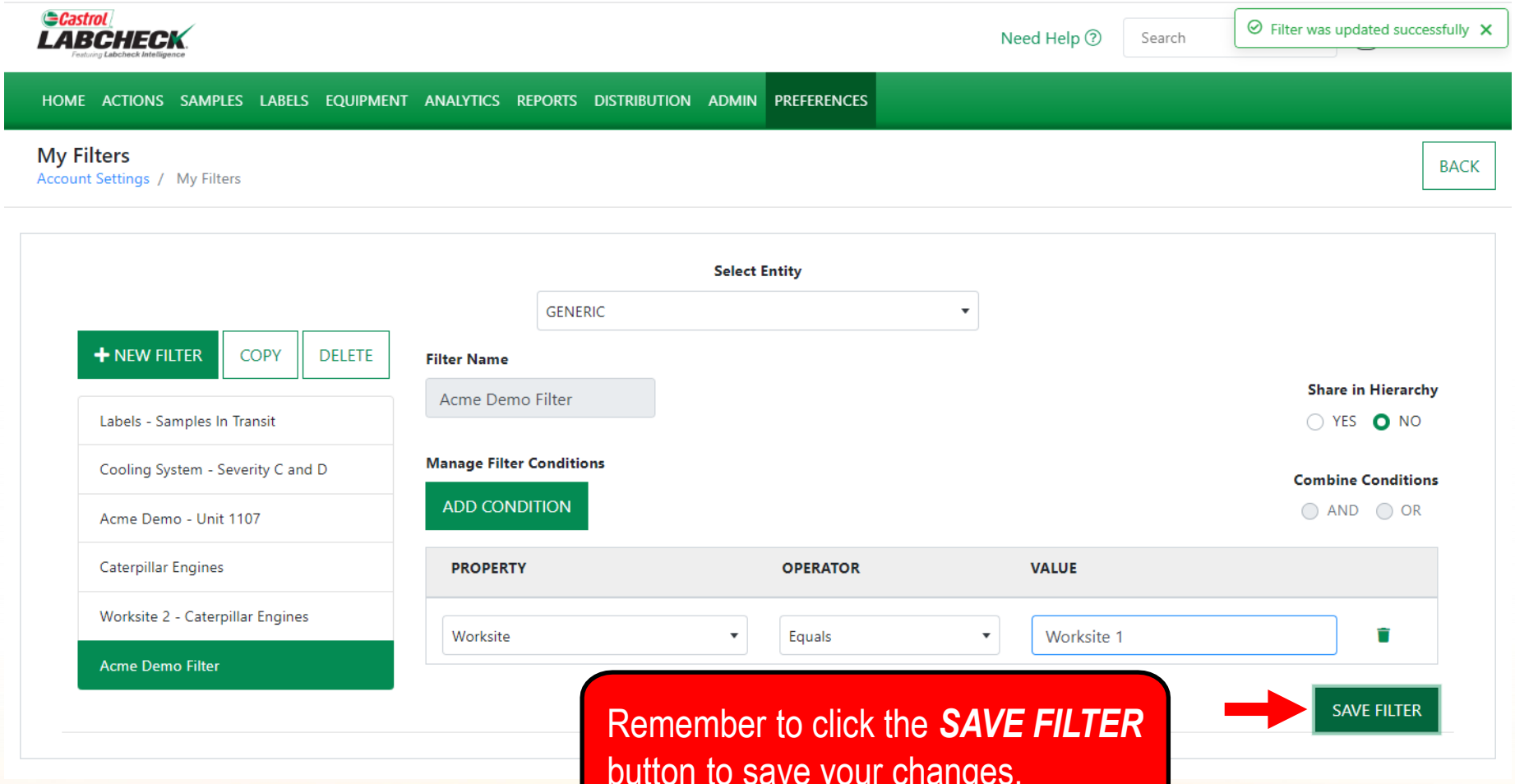
Click on the ***SAVE FILTER*** button to save your filter. Once saved, you will see a confirmation message at the top.

MODIFY A FILTER



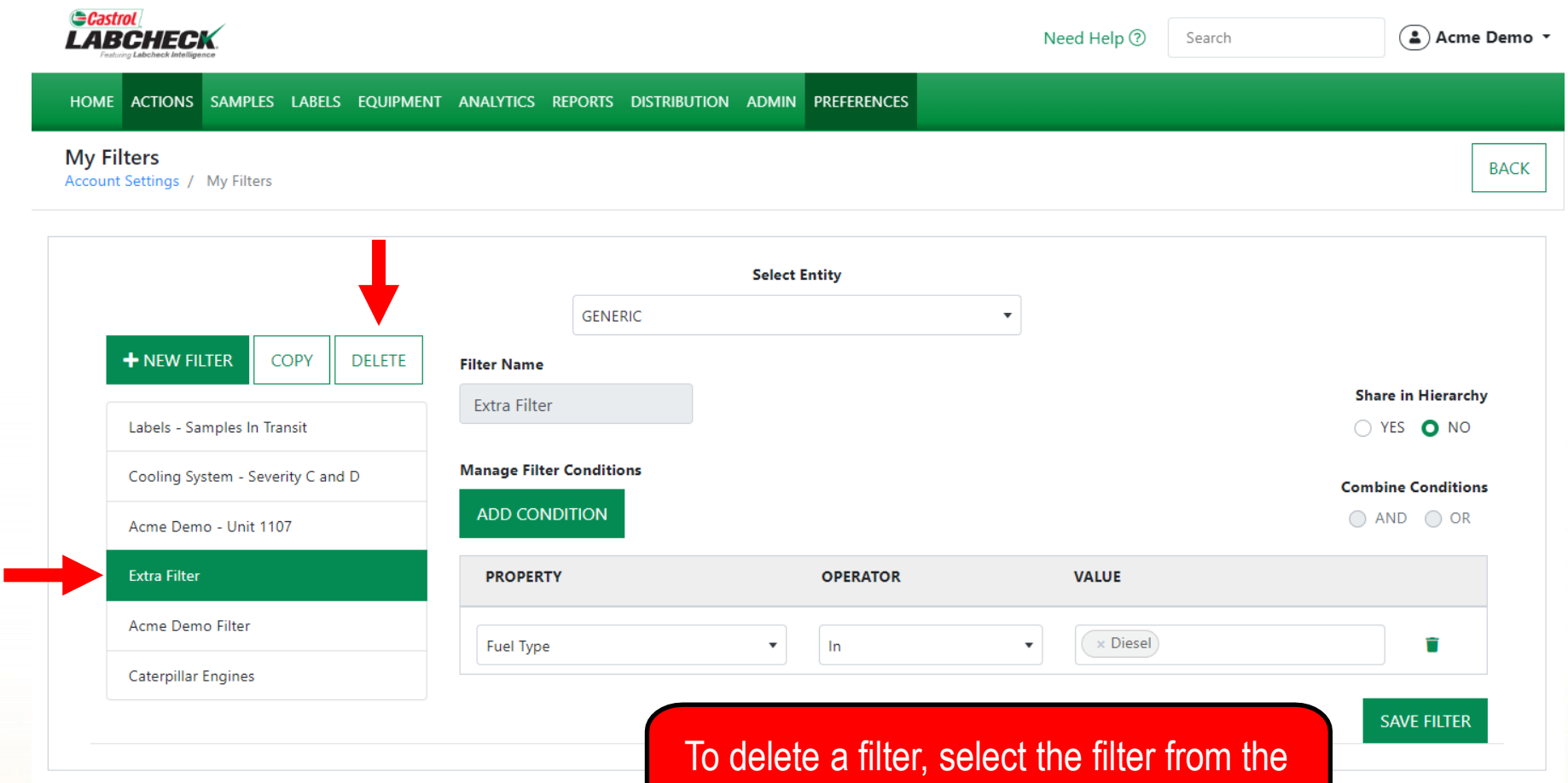
Select the desired filter from the list.
Modify existing conditions or add new ones by selecting the ***ADD CONDITION*** button.

MODIFY A FILTER



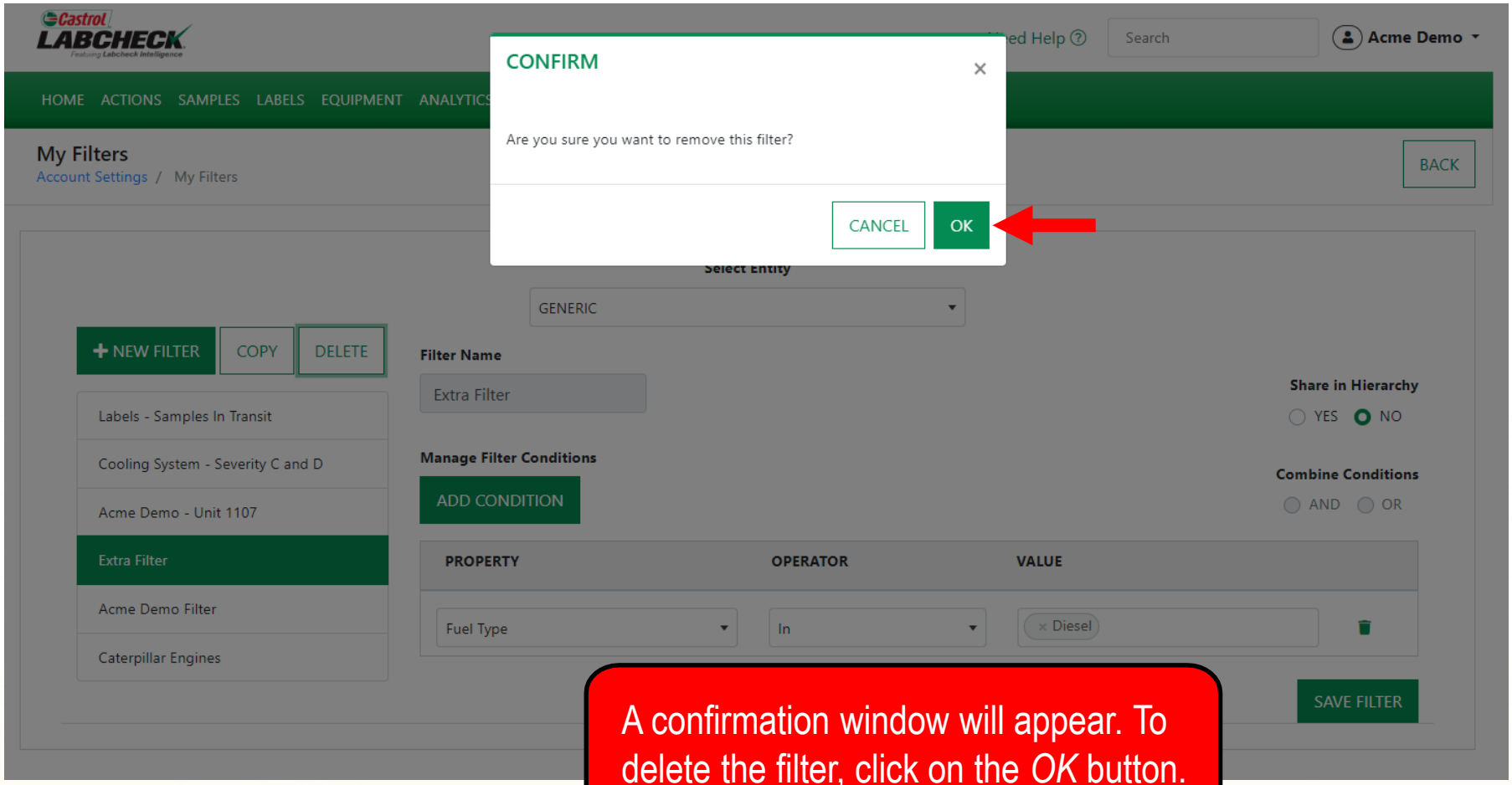
Remember to click the ***SAVE FILTER*** button to save your changes.

DELETE A FILTER



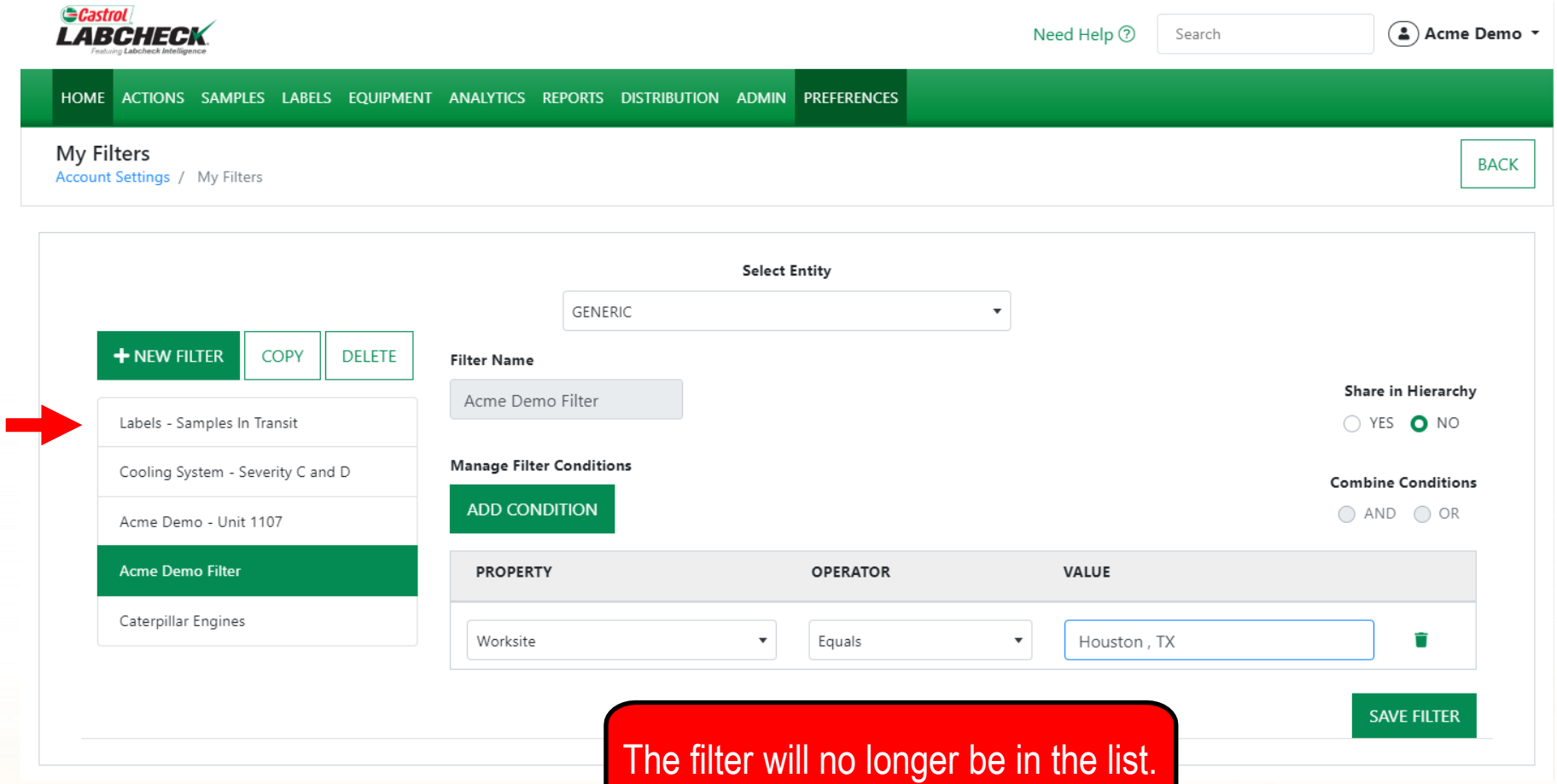
To delete a filter, select the filter from the list and click on the *DELETE* button

DELETE A FILTER



A confirmation window will appear. To delete the filter, click on the *OK* button.

DELETE A FILTER



The filter will no longer be in the list.

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Featuring Labcheck Intelligence

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