



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

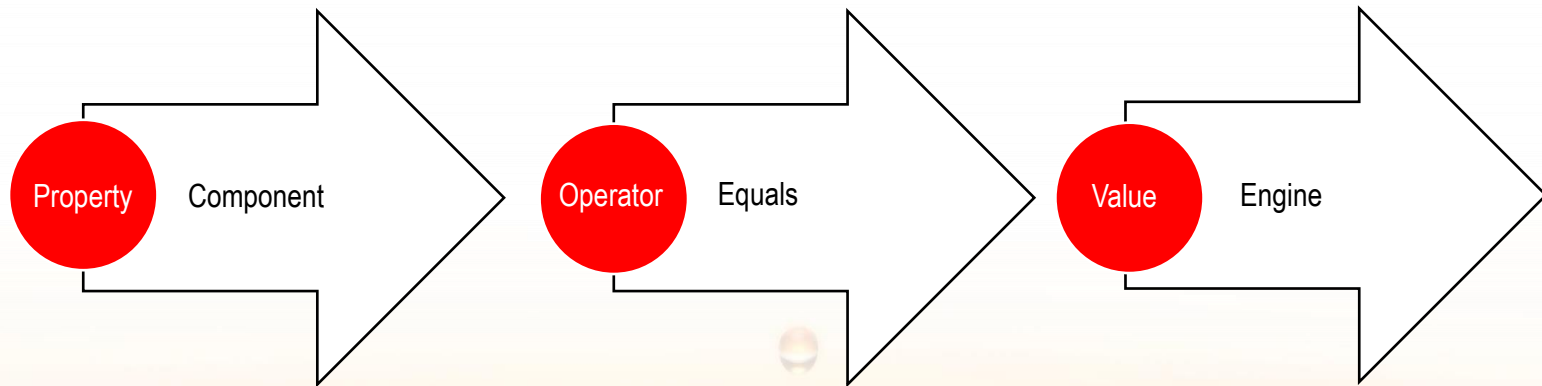
Contains

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

Account Settings

Setup your account, edit personal details, preferences, change password



MY ACCOUNT

Edit personal details, profile picture and change password



ADDRESS BOOK

Edit address book contacts



MY FILTERS

Add, edit and manage all filters



COMMUNICATIONS

Edit email communication



REGIONAL SETTINGS

Add, edit and manage all regional settings



DOWNLOADS

View and edit download features

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

CREATE A FILTER

My Filters

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BACK

Select Entity

GENERIC

+ NEW FILTER

COPY

DELETE

Filter Name

Acme Demo - Unit 1107

Acme Demo Filter

Please select a filter to edit conditions

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

CREATE A FILTER

The screenshot shows the 'NEW FILTER' dialog box in the Castrol Labcheck interface. The dialog box is titled 'NEW FILTER' and has a close button (X) in the top right corner. It contains a text input field labeled 'Name*' with the text 'Caterpillar Engines' entered. A red arrow points to the text in the input field. Below the input field are two buttons: 'CANCEL' and 'ADD FILTER'. A red arrow points to the 'ADD FILTER' button. The background shows the 'My Filters' page with a list of filters and a '+ NEW FILTER' button.

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



CREATE A FILTER

My Filters

Account Settings / My Filters

BACK

Select Entity

GENERIC

+ NEW FILTER

COPY

DELETE

Filter Name

Caterpillar Engines

Manage Filter Conditions

ADD CONDITION

Share in Hierarchy

YES NO

Combine Conditions

AND OR

SAVE FILTER

Caterpillar Engines

Acme Demo - Unit 1107

Acme Demo Filter



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

CREATE A FILTER

My Filters

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BACK

Select Entity

GENERIC

+ NEW FILTER

COPY

DELETE

Caterpillar Engines

Acme Demo - Unit 1107

Acme Demo Filter

Filter Name

Caterpillar Engines

Share in Hierarchy

YES NO

Manage Filter Conditions

ADD CONDITION

Combine Conditions

AND OR

PROPERTY

OPERATOR

VALUE

- Select -

- Select -

Action Resolution

Action Status


City

Component

Component Make

SAVE FILTER

Quick Links

 Castrol Labcheck Training

Help Desk ▾

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

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Select Entity

GENERIC

+ NEW FILTER

COPY

DELETE

Caterpillar Engines

Acme Demo - Unit 1107

Acme Demo Filter

Filter Name

Caterpillar Engines

Share in Hierarchy

YES NO

Manage Filter Conditions

ADD CONDITION

Combine Conditions

AND OR

PROPERTY

OPERATOR

VALUE

Component

- Select -

- Select -

equals

not equals

starts with

contains

SAVE FILTER

Quick Links

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

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BACK

Select Entity

GENERIC

+ NEW FILTER

COPY

DELETE

Caterpillar Engines

Acme Demo - Unit 1107

Acme Demo Filter

Filter Name

Caterpillar Engines

Share in Hierarchy

YES NO

Manage Filter Conditions

ADD CONDITION

Combine Conditions

AND OR

PROPERTY

OPERATOR

VALUE

Component

Equals

Engine

SAVE 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

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BACK

Select Entity

GENERIC

+ NEW FILTER

COPY

DELETE

Caterpillar Engines

Acme Demo - Unit 1107

Acme Demo Filter

Filter Name

Caterpillar Engines

Share in Hierarchy

YES NO

Manage Filter Conditions

ADD CONDITION

Combine Conditions

AND OR

PROPERTY

OPERATOR

VALUE

Component

Equals

Engine

Component Make

Equals

Caterpillar

SAVE FILTER



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

CREATE A FILTER

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BACK

Select Entity

GENERIC

+ NEW FILTER

COPY

DELETE

Caterpillar Engines

Acme Demo - Unit 1107

Acme Demo Filter

Filter Name

Caterpillar Engines

Share in Hierarchy

YES NO

Manage Filter Conditions

ADD CONDITION

Combine Conditions

AND OR

PROPERTY	OPERATOR	VALUE
Component	Equals	Engine
Component Make	Equals	Caterpillar

SAVE FILTER

Once all 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

My Filters

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BACK

Select Entity

GENERIC

Filter Name

Caterpillar Engines

Manage Filter Conditions

ADD CONDITION

Share in Hierarchy

YES NO

Combine Conditions

AND OR

PROPERTY	OPERATOR	VALUE
Component	Equals	Engine
Component Make	Equals	Caterpillar

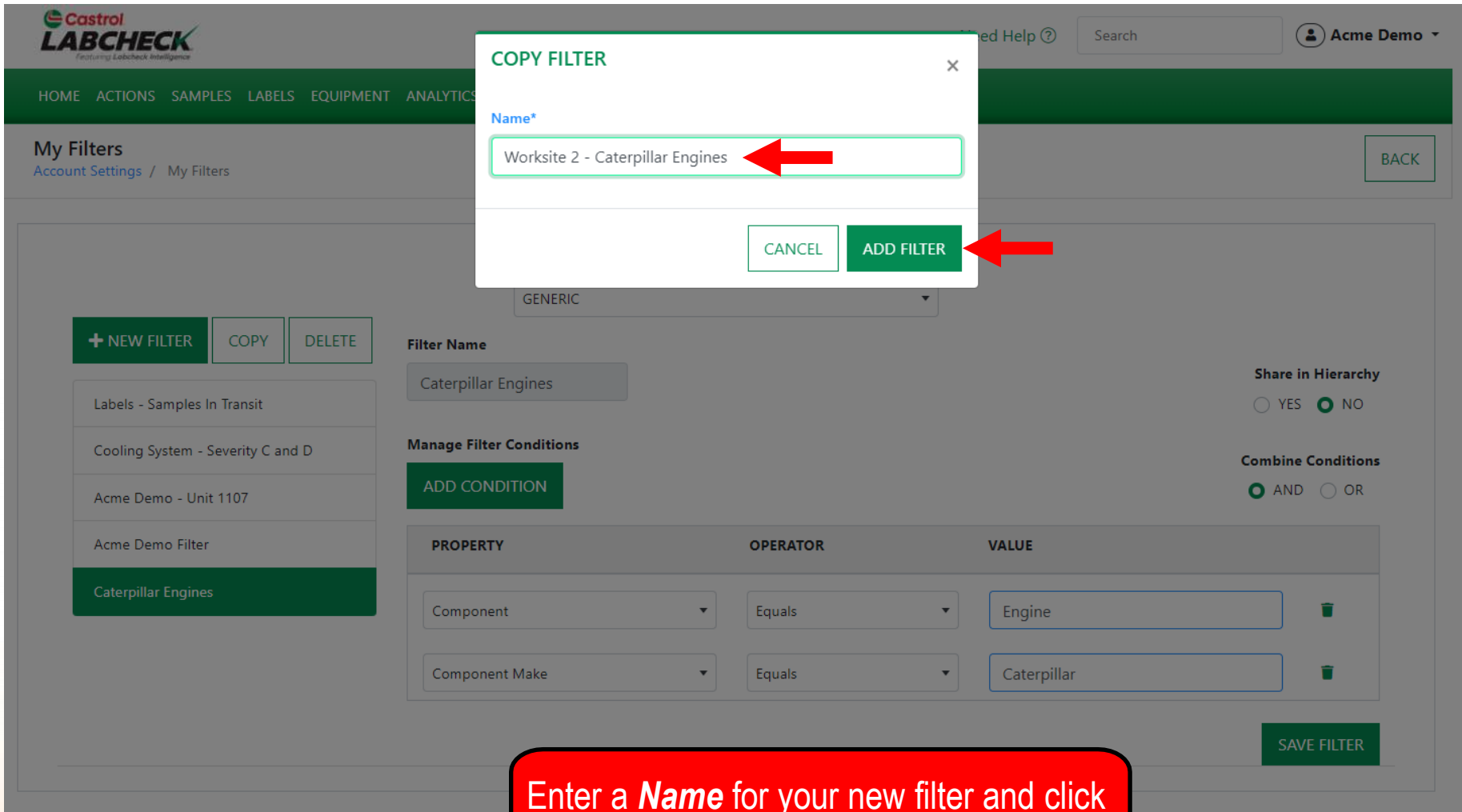
SAVE FILTER

+ NEW FILTER COPY DELETE

- Labels - Samples In Transit
- Cooling System - Severity C and D
- Acme Demo - Unit 1107
- Acme Demo Filter
- Caterpillar Engines**

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



CASTROL LABCHECK
Featuring Labcheck Intelligence

HOME ACTIONS SAMPLES LABELS EQUIPMENT ANALYTICS

My Filters
Account Settings / My Filters

BACK

COPY FILTER

Name*
Worksite 2 - Caterpillar Engines

CANCEL ADD FILTER

Filter Name
Caterpillar Engines

Manage Filter Conditions
ADD CONDITION

PROPERTY	OPERATOR	VALUE
Component	Equals	Engine
Component Make	Equals	Caterpillar

Share in Hierarchy
 YES NO

Combine Conditions
 AND OR

SAVE FILTER

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

COPY A FILTER

My Filters

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BACK

Select Entity

GENERIC

+ NEW FILTER

COPY

DELETE

Worksite 2 - Caterpillar Engines

Labels - Samples In Transit

Cooling System - Severity C and D

Acme Demo - Unit 1107

Acme Demo Filter

Caterpillar Engines

Filter Name

Worksite 2 - Caterpillar Eng

Share in Hierarchy

YES NO

Manage Filter Conditions

ADD CONDITION

Combine Conditions

AND OR

PROPERTY

OPERATOR

VALUE

Component

Equals

Engine

Component Make

Equals

Caterpillar

Worksite

Equals

Worksite 2

SAVE FILTER

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

COPY A FILTER

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BACK

Select Entity

GENERIC

+ NEW FILTER

COPY

DELETE

Labels - Samples In Transit

Cooling System - Severity C and D

Acme Demo - Unit 1107

Caterpillar Engines

Worksite 2 - Caterpillar Engines

Acme Demo Filter

Filter Name

Worksite 2 - Caterpillar Eng

Share in Hierarchy




YES NO

Manage Filter Conditions

ADD CONDITION

Combine Conditions

AND OR

PROPERTY	OPERATOR	VALUE	
Component	Equals	Engine	
Component Make	Equals	Caterpillar	
Worksite	Equals	Worksite 2	

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



SAVE FILTER

MODIFY A FILTER

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BACK

Select Entity

GENERIC

+ NEW FILTER

COPY

DELETE

Labels - Samples In Transit

Cooling System - Severity C and D

Acme Demo - Unit 1107

Caterpillar Engines

Worksite 2 - Caterpillar Engines

Acme Demo Filter

Filter Name

Acme Demo Filter

Share in Hierarchy

YES NO

Manage Filter Conditions

ADD CONDITION

Combine Conditions

AND OR

PROPERTY

OPERATOR

VALUE

Worksite

Equals

Houston, TX

SAVE FILTER

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

MODIFY A FILTER

My Filters

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BACK

Select Entity

GENERIC

+ NEW FILTER COPY DELETE

- Labels - Samples In Transit
- Cooling System - Severity C and D
- Acme Demo - Unit 1107
- Caterpillar Engines
- Worksite 2 - Caterpillar Engines
- Acme Demo Filter**

Filter Name

Acme Demo Filter

Manage Filter Conditions

ADD CONDITION

PROPERTY	OPERATOR	VALUE
Worksite	Equals	Worksite 1

Share in Hierarchy

YES NO

Combine Conditions

AND OR

SAVE FILTER

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



DELETE A FILTER

My Filters

Account Settings / My Filters

BACK

+ NEW FILTER

COPY

DELETE

Labels - Samples In Transit

Cooling System - Severity C and D

Acme Demo - Unit 1107

Extra Filter

Acme Demo Filter

Caterpillar Engines

Select Entity

GENERIC

Filter Name

Extra Filter

Manage Filter Conditions

ADD CONDITION

Share in Hierarchy

YES NO

Combine Conditions

AND OR

PROPERTY

OPERATOR

VALUE

Fuel Type

In

x Diesel

SAVE FILTER

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

DELETE A FILTER

The screenshot shows the Castrol Labcheck web application interface. A confirmation dialog box is open in the center, asking "Are you sure you want to remove this filter?". The dialog has "CANCEL" and "OK" buttons. A red arrow points to the "OK" button. In the background, the "My Filters" section is visible, with a list of filters including "Extra Filter" which is highlighted. The "DELETE" button is also highlighted in the filter list. Below the dialog, a red callout box contains the text: "A confirmation window will appear. To delete the filter, click on the OK button."

CONFIRM

Are you sure you want to remove this filter?

CANCEL OK

Account Settings / My Filters

Filter Name: Extra Filter

Manage Filter Conditions

PROPERTY	OPERATOR	VALUE
Fuel Type	In	Diesel

SAVE FILTER

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



DELETE A FILTER

My Filters

Account Settings / My Filters

BACK

Select Entity

GENERIC

+ NEW FILTER

COPY

DELETE

Labels - Samples In Transit

Cooling System - Severity C and D

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Acme Demo Filter

Caterpillar Engines

Filter Name

Acme Demo Filter

Share in Hierarchy

YES NO

Manage Filter Conditions

ADD CONDITION

Combine Conditions

AND OR

PROPERTY

OPERATOR

VALUE

Worksite

Equals

Houston, TX



SAVE FILTER

The filter will no longer be in the list.



CASTROL LABCHECK SUPPORT DESK:

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