

Lube Oil Analysis Management System

Quick Start Guide: Filters Advanced



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 LOAMS 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 are also applicable to the new "Distribution" feature. (See the "Quick Start Guide: Report Distributions" for more information.)

Filter Properties



Filter "Properties" are the data fields in which you choose to apply your filter to (ie: 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

- 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

Equipment

- Customer Worksite
- Unit ID
- Unit Manufacturer
- Unit Model
- Component

Labels

- Component
- Unit ID
- Customer Worksite
- Tracking Number
- Status

Reports

- Customer Worksite
- Date Range

Filter 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 <u>contain</u> the value inputted for the given property

Equals

 Will only display results that <u>match the</u> <u>exact</u> value inputted for the given property

Not Equals

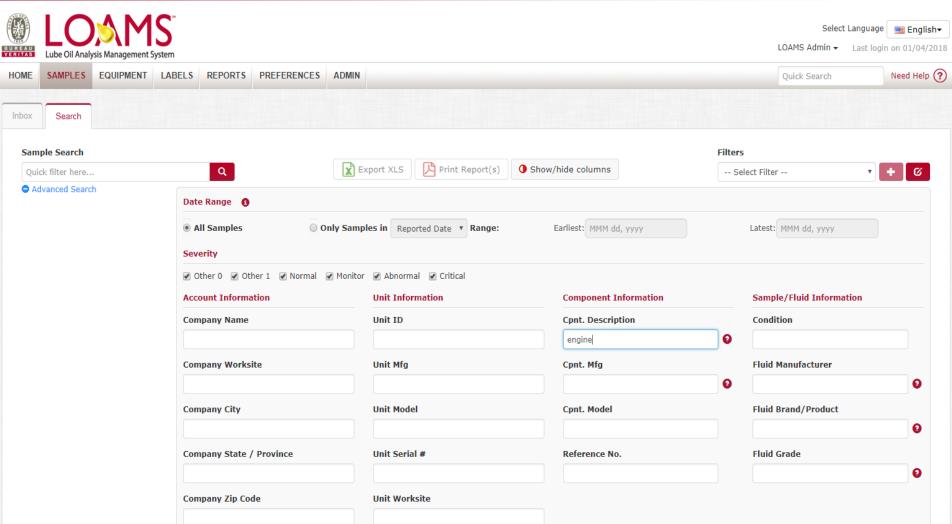
 Will only display results that <u>do not</u> <u>match the exact</u> value inputted for the given property

Starts With

 Will only display results that <u>begin</u> with the value inputted for the given property

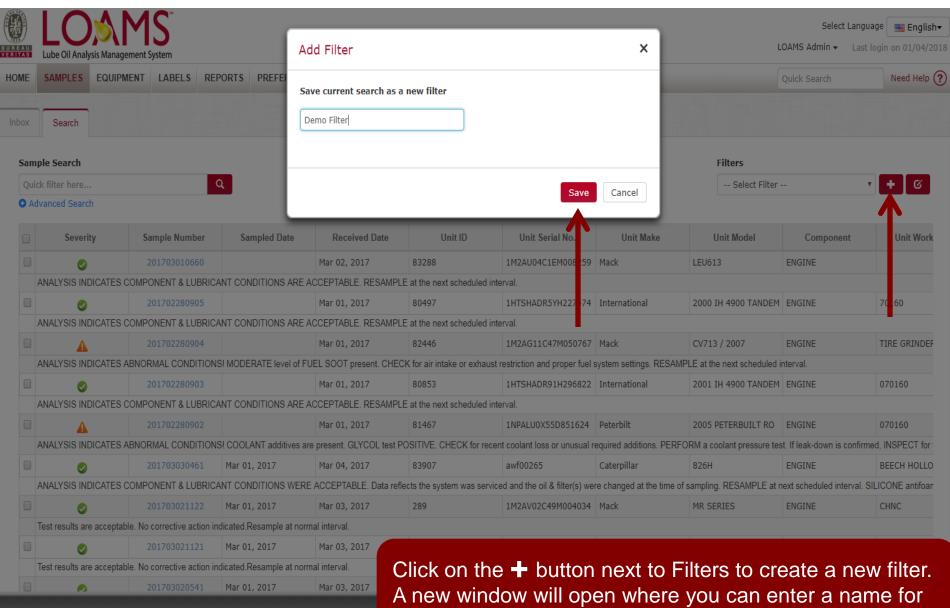
Note: Filter types that end with "Comma Separated" allows users to input multiple values for a given property by using a comma to separate each value.





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*.

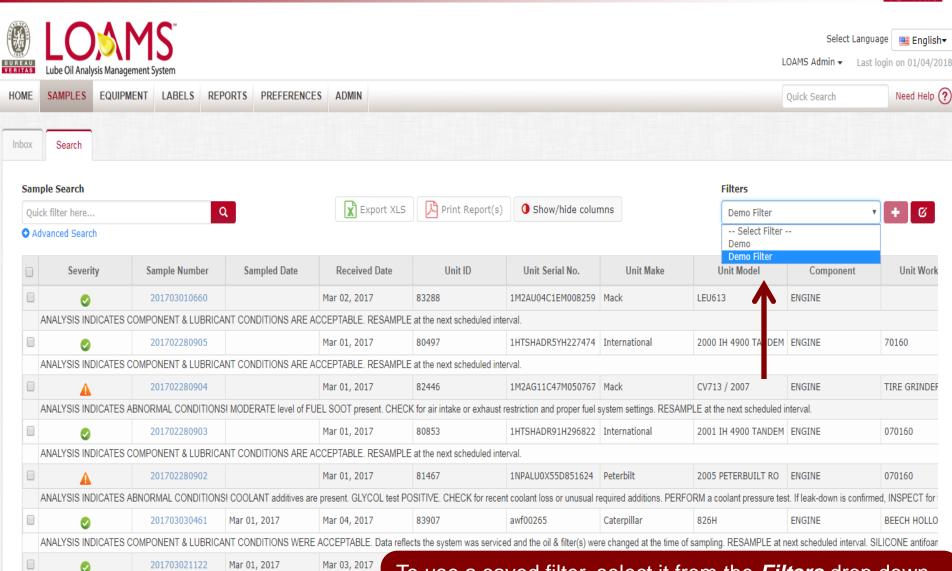




vour filter and click **Save**.

Accessing Filters Through the Equipment Tab

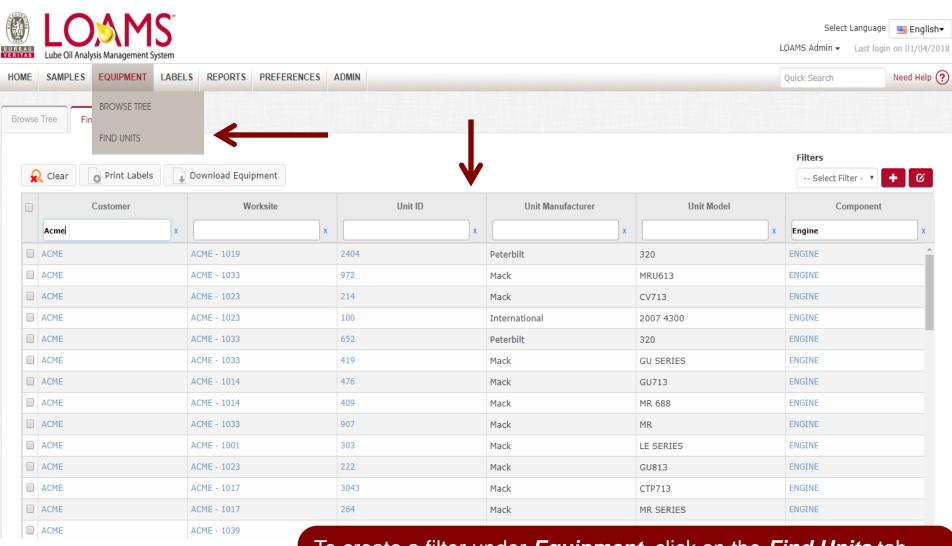




To use a saved filter, select it from the *Filters* drop down list. Once selected, search results will automatically display.

Accessing Filters Through the Equipment Tab

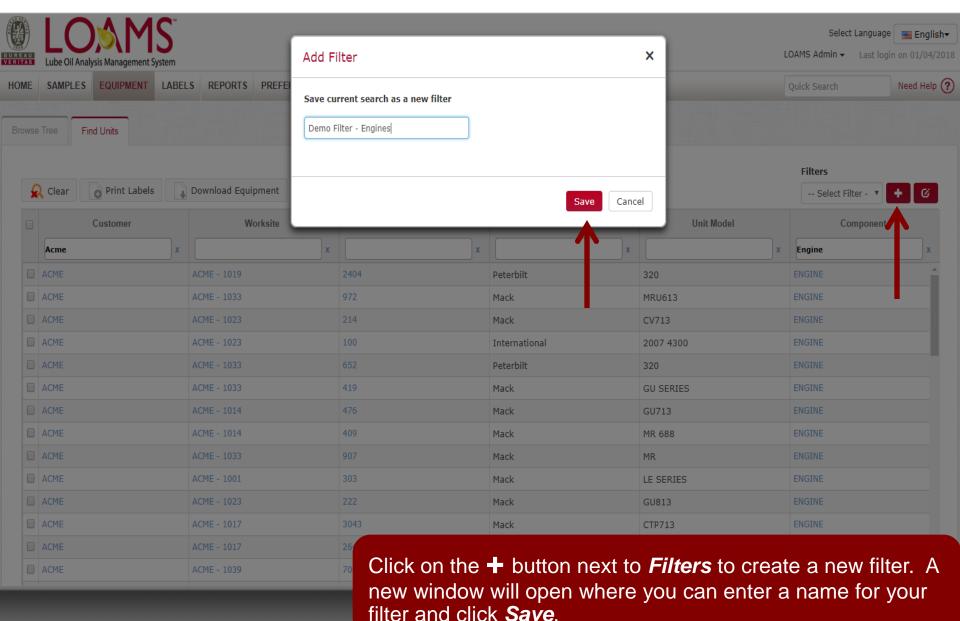




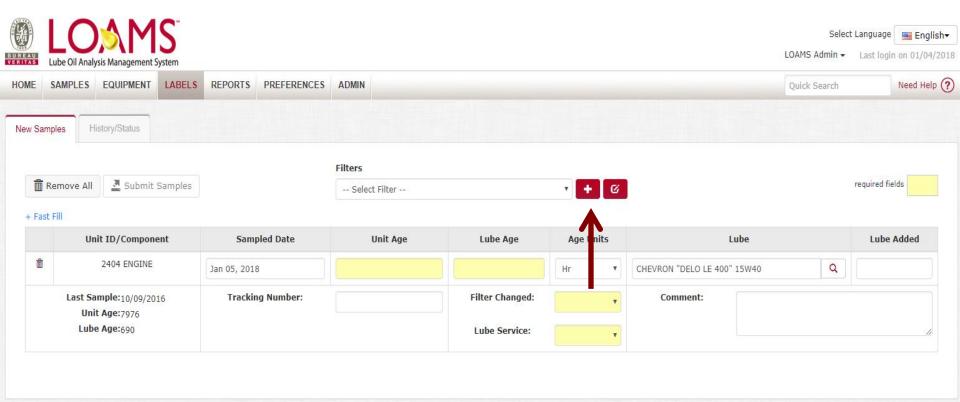
To create a filter under *Equipment*, click on the *Find Units* tab. From here you can run a search using the six properties located at the top. Once you have your search criteria filled out your results will display below.

Accessing Filters Through the Equipment Tab



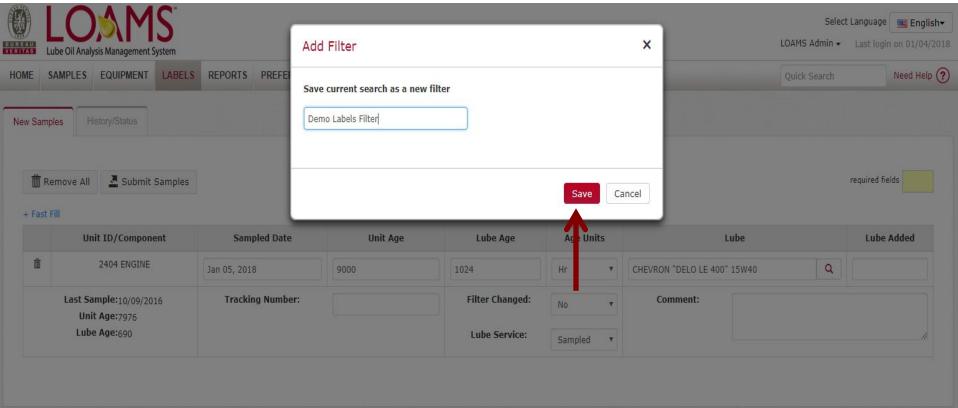






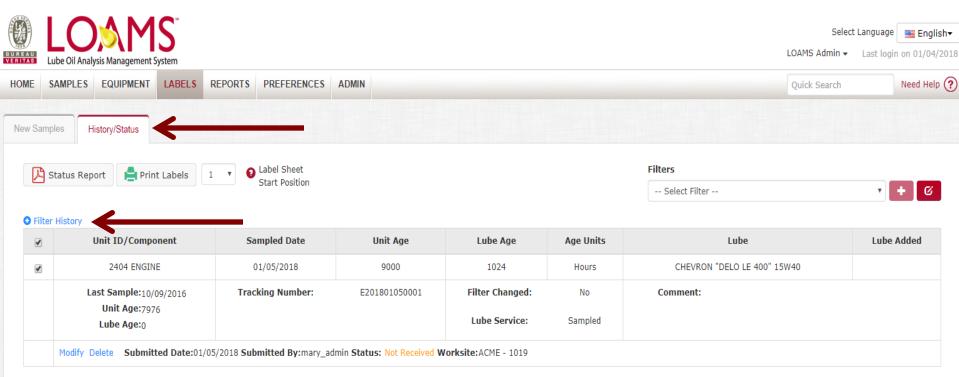
You can save time when creating labels by creating a filter under the Labels tab. First fill out the required fields listed in yellow. To save this filter click on the + button.





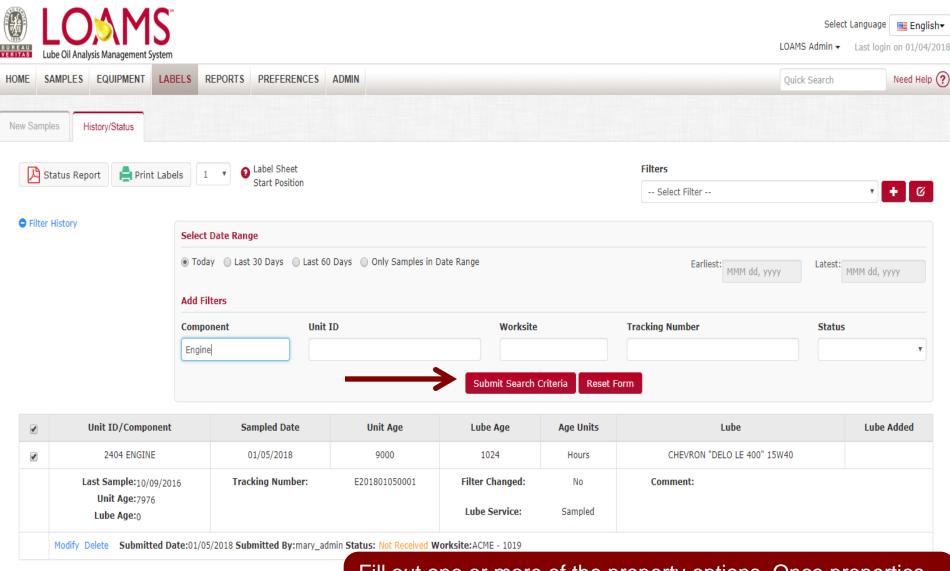
A new window will open where you can enter a name for your filter and click **Save.**





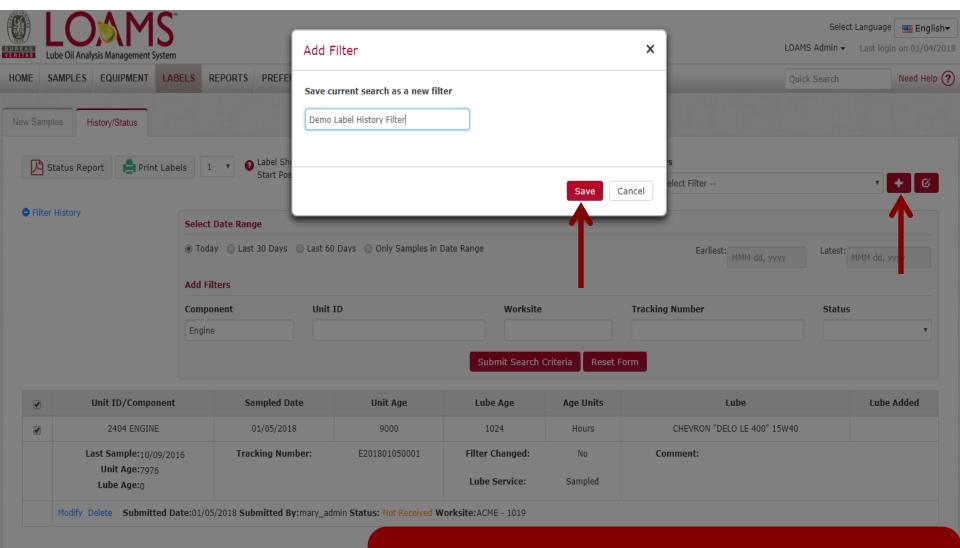
Save time when searching for submitted samples by creating a filter on the *History/Status* tab. To start, click on *Filter History* to expand the search table.





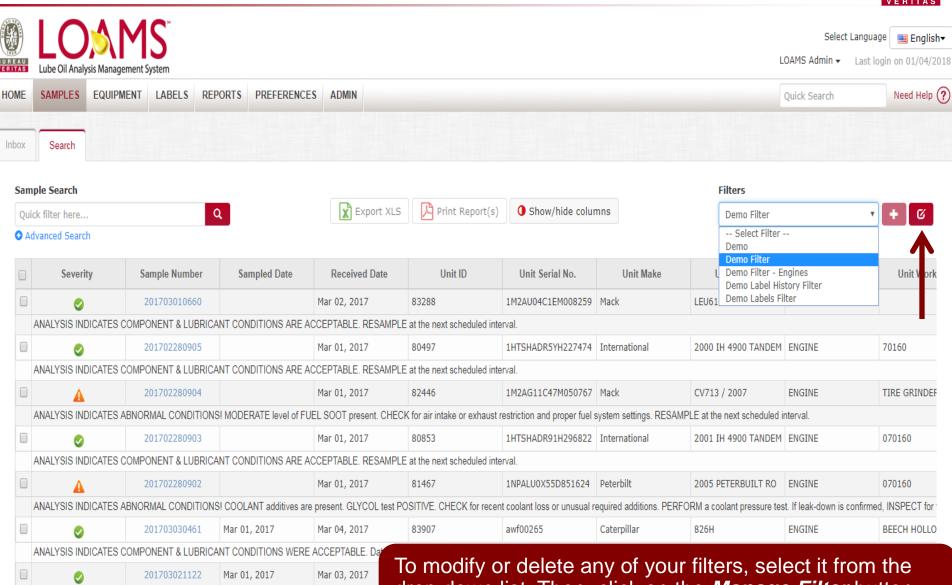
Fill out one or more of the property options. Once properties are filled out, click on **Submit Search Criteria**.





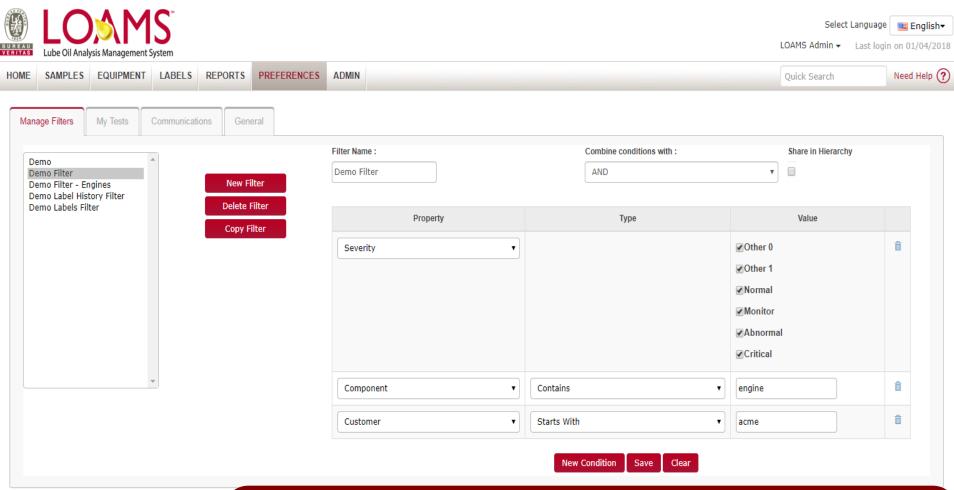
Click on the + button next to Filters to create a new filter. A new window will open where you can enter a name for your filter and click **Save.**





drop down list. Then, click on the *Manage Filter* button. This will bring you to the *Preferences* tab.

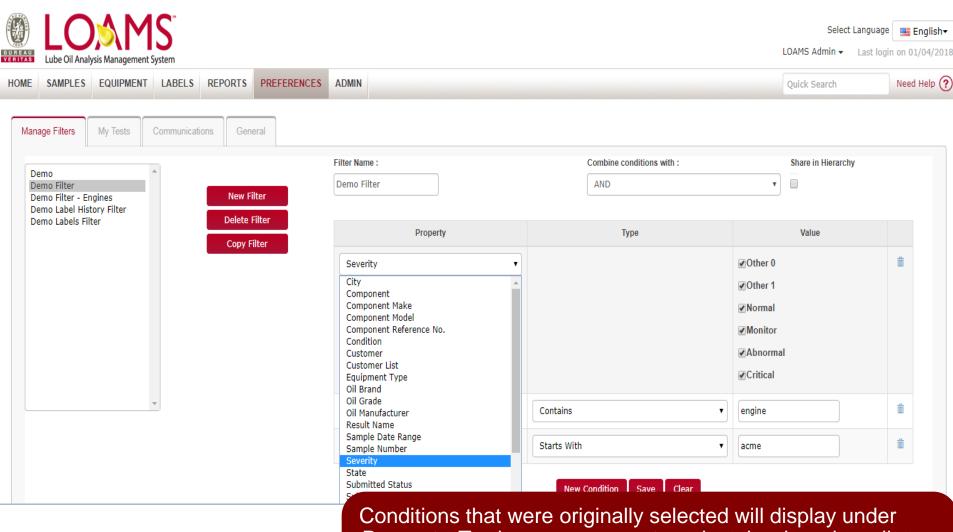




You can add, modify or delete filters through the *Preferences* tab under *Manage Filters*. Depending on which filter you have selected on the left side, the right side will display the conditions for the filter.

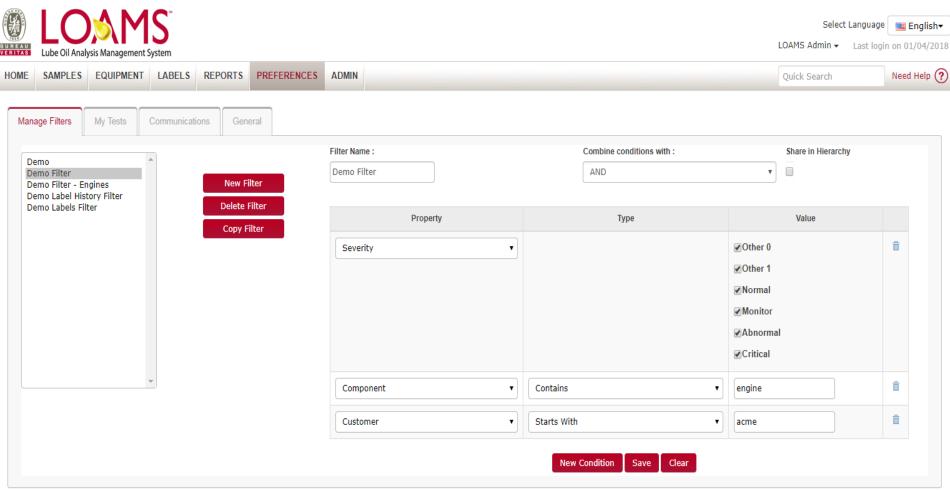
(For more detailed instructions please view the Filters Quick Start Guide)





Property. To change a **property**, select the drop down list and choose from options listed. When changing the **property**, the **type** and **value** fields must be updated to reflect the property that was chosen.





To delete a condition, select the trash icon next to the condition you want to remove. To delete a filter, select the filter you want to delete on the left so that it is highlighted in gray, and click the **Delete Filter** button.





LOAMS® SUPPORT DESK:

Phone: **1-800-655-4473**

Email: LOAMS@us.bureauveritas.com

www.AnalystsIncOnline.com

www.AnalystsInc.com/LOAMS-Resource-Center