



FILTERS

Filters are an excellent tool for sorting through material records, diaries, DWR's and so many other things. They can be customized for different needs. For large projects, they are especially helpful for materials and DWR's. It can expedite looking for information that could be requested by an EPM, Contractor, District...anyone.

Setting filters

This can be set in almost every screen. Below is how to set for some of the most common locations.

Daily Work Reports: **Daily Work Reports -> System Default box**

- Click on the blue hyperlink for Daily Work reports.
- In the second drop down Box, you will see a system default box. This will always be the default the first time.

All Daily Work Report

▼ All Daily Work Report Overview

🔍 Type search criteria or press Enter System Default ▼ Status: No Filter ▼

- There is also a No filter box. The No filter will bring up any contract and any inspector associated with that contract. This box also narrows down DWR's from Approved, Draft, Pending Approval and Rejected. This is will bring up all the DWR's for contracts that you are associated with if you do not enter a contract into the first box.

Status

No Filter ▼

- No Filter
- Approved
- Draft
- Pending Approval
- Rejected

- To sort a selection of DWR's (helpful during estimates to make sure all DWR's are authorized) click on the System Default drop down arrow
- Select the ADVANCED blue link.
- This will open a new box. These boxes are customizable.

- This filter above is sorted by DWR date. It is also sorted by descending dates. You can choose to sort by contract, DWR date, or by inspector.
- **To tie to a specific contract:** Click on the Filters box. Choose DWR date. This will open some other command choices. These do have to be filled out since we are being specific.

DWR DATE -> IS NOT BLANK
AND -> CONTRACT ID -> CONTAINS -> CONTRACT NUMBER

We have told the filter that we want the Date to have something in it and we want it to also contain the contract number. This will remove the need to add a contract number in the search box in the Overview Screen.

- You can set them for multiple contracts. It is recommended that under the Apply settings that you put in a contract number that this references, the name of the project, something that will help you know what the filter is set for. In the SAVE AS box, enter your contract number and then SAVE AND APPLY at the bottom.

- The system will update your view to the information from the filter.
- You can always edit the existing filter. Make sure that you have the filter in the box. Select Advanced. It will open the filter chosen.
- If you want to delete the filter, if it no longer applies to the specific contract, then select the filter, select Advanced and the gray Delete this Setting Button. Then Save and apply at the bottom.

Editing DWR's: 06119 Delete this setting

Filters

DWR Date Is Not Blank

And Contract ID Contains 06119

Or *Select field to filter by*

Sort

DWR Date Sort descending

SAMPLE RECORDS FILTERS: Home Dashboard -> Sample Records -> System Default Box

- This is a great place to use filters. You can have them for a project specific, material specific, & date specific to name a few.
- From the home dashboard, click on the Sample records hyperlink.
- In the System Default Box, select ADVANCED
- Under the Filters, there is a drop-down box.
- Depending on what you are looking for, you can sort through different items. A great one to use is material specific and contract. This is great for a contract you may have a lot of dirt work on or concrete. You can also set a contract only filter that will bring every sample record that is tied to the contract.

For a contract only: Select the Contract ID. This can be found scrolling down under the Hidden Columns section.

Filters

Select field to filter by

Sort

Apply Settings

Save as

Make this

2019032601

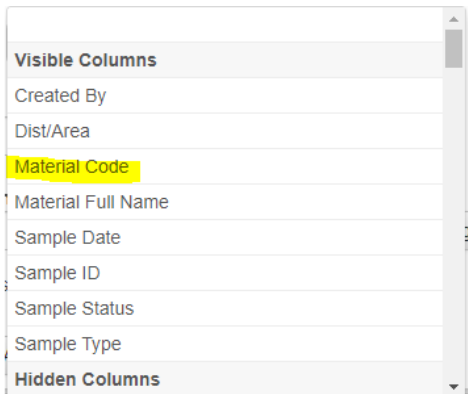
- Acceptance Method
- Administrative Office
- Administrative Office Modified By User ID
- Administrative Office Modified Date
- Authorized By
- Authorized Date
- Buy American
- Buy USA Requirements
- Comments
- Contract ID**
- Control Number

- Once this is selected, it will generate options. Fill out the required information. You want to make sure that it says CONTAINS then the contract number

Contract ID Contains 03C19

- Under the Apply Settings, in the Save as box, add the contract number or the project name. Example: 03C19 or Westby West.
- Click Save and apply.

- If you want a specific material code, choose material code in the Visible Columns section.



- Material code should include the entire material code that you would like to filter to. You can use partial codes, but it is better to use the full number since it will pull up that specific item and not all the material with the beginning code numbers. It is also a great idea to add the contract id. Then it is sorting to the contract and the material code.

Editing System Default ▼ Delete this setting

Filters

Material Code ▼ **Contains** ▼ 551.03.02.02

And ▼ Contract ID ▼ **Contains** ▼ 03C19

Or ▼ ▼ *Select field to filter by*

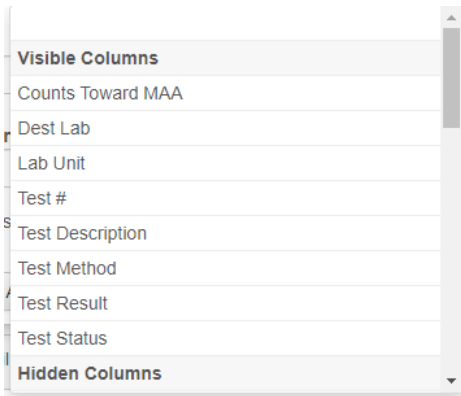
- Name the material. Example: Westby Gen concrete.
- Click the Save and apply.

Sample Record Tests: [Home Dashboard](#) -> [Sample Records Hyperlink](#) -> [Sample Record](#) -> [Tests tab](#)

- This is really helpful for lab testers. When working with a sample like a soil survey, there can be numerous tests. This can have multiple tests to the same test method. If you have to recheck something later, this will make it

1.0	R-Value	AASHTO T 190	Helena	Soils	Yes	60 - Test Approved by Lev	Pass	▼
1.0	Soil Class	AASHTO M 145 (Hole 01)	WolfPoint	WolfPointLab	Yes	60 - Test Approved by Lev	Pass	▼
2.0	Soil Class	AASHTO M 145 (Hole 02)	WolfPoint	WolfPointLab	Yes	60 - Test Approved by Lev	Pass	▼
3.0	Soil Class	AASHTO M 145 (Hole 02A)	WolfPoint	WolfPointLab	Yes	60 - Test Approved by Lev	Pass	▼
4.0	Soil Class	AASHTO M 145 (Hole 03)	WolfPoint	WolfPointLab	Yes	60 - Test Approved by Lev	Pass	▼
5.0	Soil Class	AASHTO M 145 (Hole 04)	WolfPoint	WolfPointLab	Yes	60 - Test Approved by Lev	Pass	▼
6.0	Soil Class	AASHTO M 145 (Hole 04A)	WolfPoint	WolfPointLab	Yes	10 - Test In Queue		▼
7.0	Soil Class	AASHTO M 145 (Hole 05)	WolfPoint	WolfPointLab	Yes	60 - Test Approved by Lev	Pass	▼
8.0	Soil Class	AASHTO M 145 (Hole 06)	WolfPoint	WolfPointLab	Yes	60 - Test Approved by Lev	Pass	▼
9.0	Soil Class	AASHTO M 145 (Hole 07)	WolfPoint	WolfPointLab	Yes	60 - Test Approved by Lev	Pass	▼
Test #	Test Method	Test Description ▼	Dest Lab	Lab Unit	MAA ▼	Test Status	Test Result	▼
10.0	Soil Class	AASHTO M 145 (Hole 08)	WolfPoint	WolfPointLab	Yes	60 - Test Approved by Lev	NA	
11.0	Soil Class	AASHTO M 145 (Hole 08A)	WolfPoint	WolfPointLab	Yes	60 - Test Approved by Lev	NA	▼

- For Soil Classification, this filter will need to be entered in slightly different as if you put in Soil Class for the test method, it will also bring in the LLPI.
- In the tests tab next to the search box, you will see an **ADVANCED** hyperlink. Select the hyperlink.
- You will notice that there are different choices than what was above in the Visible column section.



- For a soil survey, you can set multiple filters depending on the tests. For the Soil Classification test, you will want to set multiple filter parameters. It is suggested to set it as noted below. This will make sure that the LLPI is not pulled in with just the Soil Classification test.

Editing Soil Class ▼ Deleting...

Filters

Test Method ▼ Contains ▼ Soil Class

And ▼ Test Description ▼ Contains ▼ AASHTO M 145

- For LLPI, R-Value and other required tests it is easier to set the parameters for the filter.

Filters

Test Method ▼ Contains ▼ LLPI

Filters

Test Method ▼ Contains ▼ R-Value

Note: It will make it easier if you SAVE AS the method that you are setting your filter parameters on (Example: LLPI, R-value, Soil Classification, ect) and Mark it as a Default Setting. This will allow the filter to be used in any test screen that is used.