
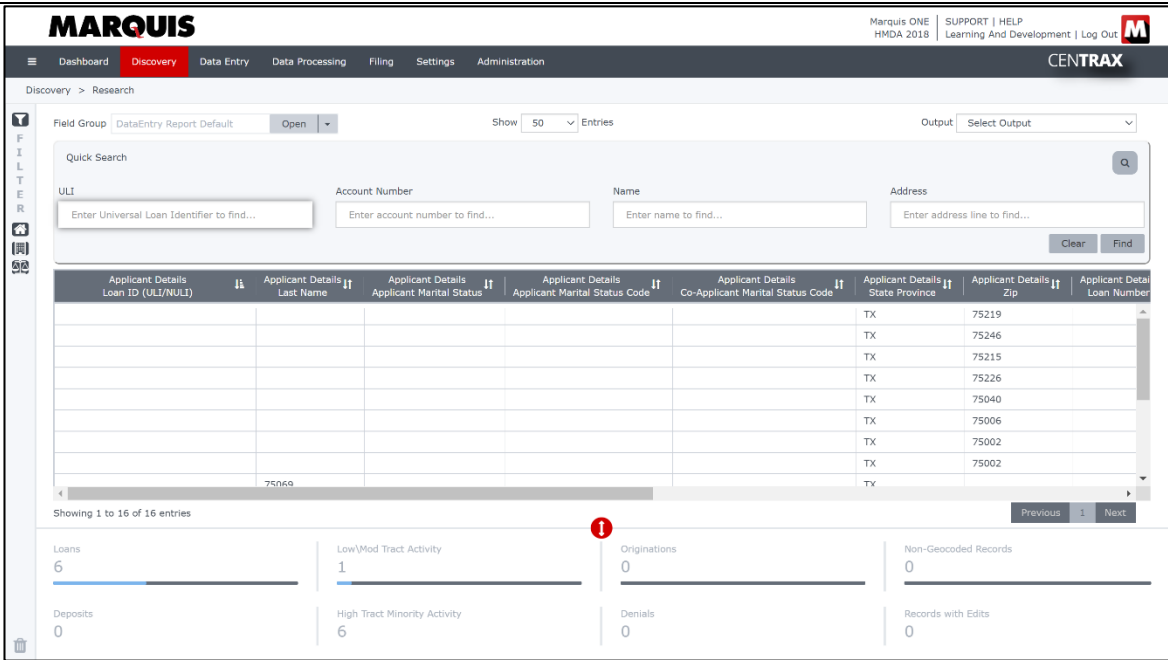

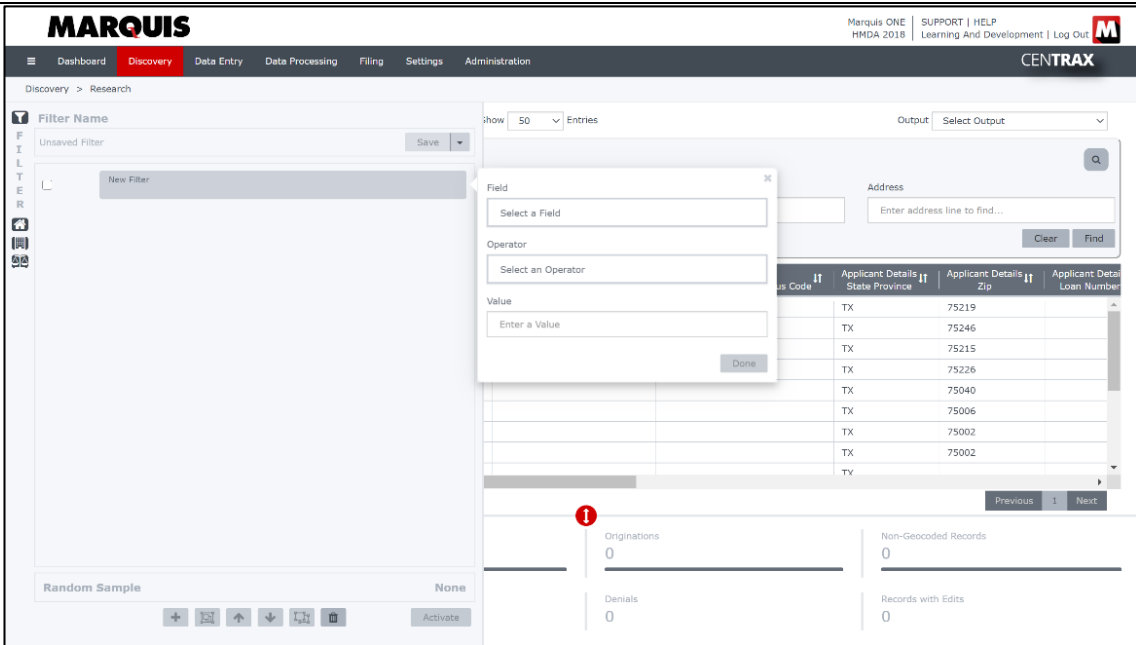


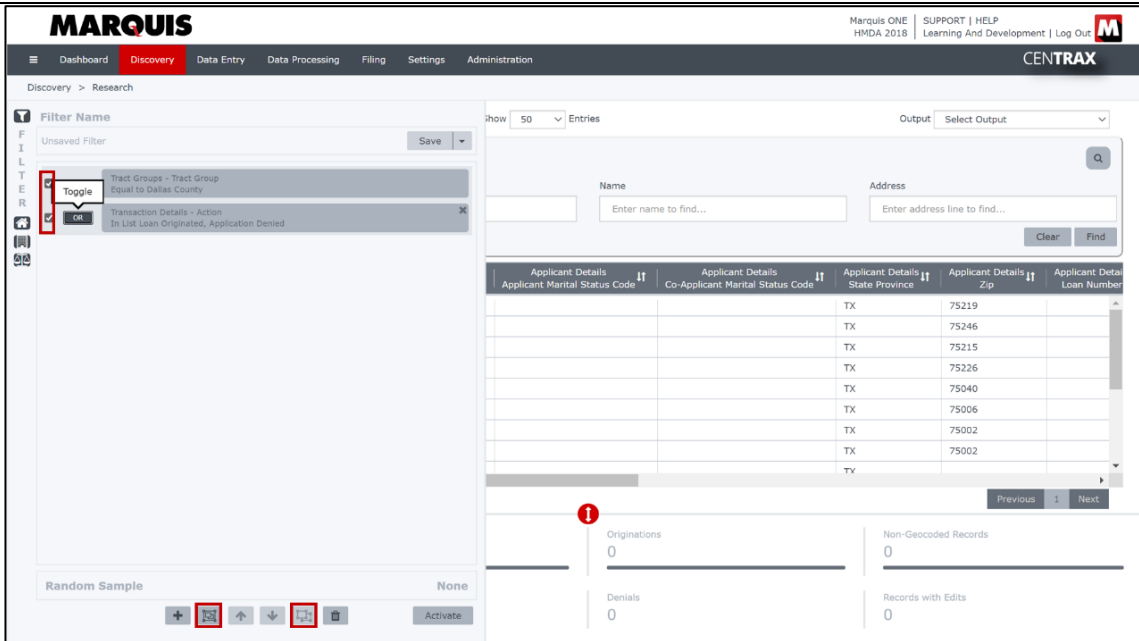



<b>CNX402</b>	<b>Research – Filtering Overview</b>
	Filtering is used to isolate specific records for analysis purposes, data audits and select processes/reports as well as various areas within the CenTrax Next platform.
<b>Order of Steps</b>	<b>Tasks</b>
<b>Step 1</b>	Log into <b>CenTrax NEXT</b>
	The active <b>Institution</b> and <b>File</b> will display in the upper right-hand section to the left of the name of the user logged in.
<b>Step 2</b>	Click on <b>Discovery</b>
<b>Step 3</b>	Click <b>Research</b>
<b>Note:</b> Filters are accessible at the top of the page or by utilizing the filter window. To build a three-step filter using the filter window, instead of the quick search tool, jump to <b>Step #8</b> .	
<b>Step 4</b>	Click the <b>Quick Search magnifying glass</b> icon  to expand the quick search bar.
<b>Step 5</b>	Use the <b>Quick Search in place of a filter</b> to easily locate records by entering in at least one or any combination of: <ul style="list-style-type: none"> <li>• ULI</li> <li>• Account Number</li> <li>• Name</li> <li>• Address</li> </ul>
	
<b>Step 6</b>	Click the <b>Find</b> button to locate and display the qualifying record(s).
<b>Step 7</b>	Click the Quick Search icon again to minimize the tool.
<b>Note:</b> In order to access any of the actions within Research, a filter must be in place. If all records are desired, simply click the <b>Activate</b> button within the Filter window without any filter condition boxes in place.	
<b>Step 8</b>	The filter window should be extended. If it isn't, click the Filter  icon to extend it
<b>Step 9</b>	Click on the <b>+</b> located in the bottom left hand side of the page to <b>add</b> a new filter condition box.
<b>Step 10</b>	Click on the empty <b>condition box</b> and a three-step box will appear containing: Field, Operator and Value

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<b>Step 11</b>	Select a <b>Field</b>
11.1	Click the drop-down arrow in the <b>Field</b> box
11.2	Click on a field to select it
<b>Note:</b> A search function can be applied by typing in the box. Simply begin typing in the box and any fields that contain the set of characters will list below in the available list.	
<b>Step 12</b>	Select an <b>Operator</b>
12.1	Click the drop-down arrow in the <b>Operator</b> box
12.2	Click on an operator to select it
<b>Step 13</b>	Select the <b>Value(s)</b>
13.1	Type in the <b>Value</b> or click the drop-down arrow to select a lookup value if the field contains any lookup values available
13.2	If more than one value is desired, click the plus symbol within the Value
<b>Note:</b> Typing in the box will apply the search function to make it easier to locate specific values.	
<b>Step 14</b>	Click <b>Done</b> once all selections are made.
	 <p>The screenshot displays the MARQUIS Discovery interface. A modal window is open for creating a filter. The modal has three sections: 'Field' with a dropdown 'Select a Field', 'Operator' with a dropdown 'Select an Operator', and 'Value' with a text input 'Enter a Value' and a plus icon. A 'Done' button is at the bottom right of the modal. In the background, a table of 'Applicant Details' is visible with columns: 'State', 'Province', 'Zip', and 'Loan Number'. The table contains several rows of data, including TX, TX, TX, TX, TX, TX, TX, and TX. At the bottom of the interface, there are statistics: 'Originations 0', 'Non-Geocoded Records 0', 'Denials 0', and 'Records with Edits 0'.</p>
<b>Step 15</b>	To add more filter conditions, click on the <b>+</b> and another conditions box will appear
15.1	The default connector is <b>AND</b>
15.2	To switch it to <b>"OR"</b> , click on the connector to toggle between connector options
15.3	Follow steps <b>10-14</b> for building the filter condition

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<b>Step 16</b>	To group 2 or more “ <b>OR</b> ” statements, place a <b>check mark</b> in the boxes to the left of the filter condition boxes
16.1	Click the “ <b>Group Conditions</b> ” button  , located directly to the right of the plus symbol.
<b>Step 17</b>	To ungroup conditions, place a <b>check mark</b> in the boxes to the left of each filter condition box that has been grouped
17.1	Click the “ <b>Ungroup Conditions</b> ” button  , located directly to the left of the trash can symbol.
<b>Step 18</b>	To remove a filter condition, hove over it and click the “ <b>X</b> ” in the upper right hand corner of the condition box
	
<b>Step 19</b>	Continue with this step to validate qualifying records before saving the filter. Skip to <b>Step 20</b> to simply save the filter.
19.1	To apply the filter just built, click the <b>Activate</b> button on the bottom right hand side of the filter box.
19.2	The filter window will slide away to display those records.
19.3	If the <b>Filter</b> window doesn't slide out of view, click the <b>Filter</b> icon  to toggle it out of the way to view the qualified records.

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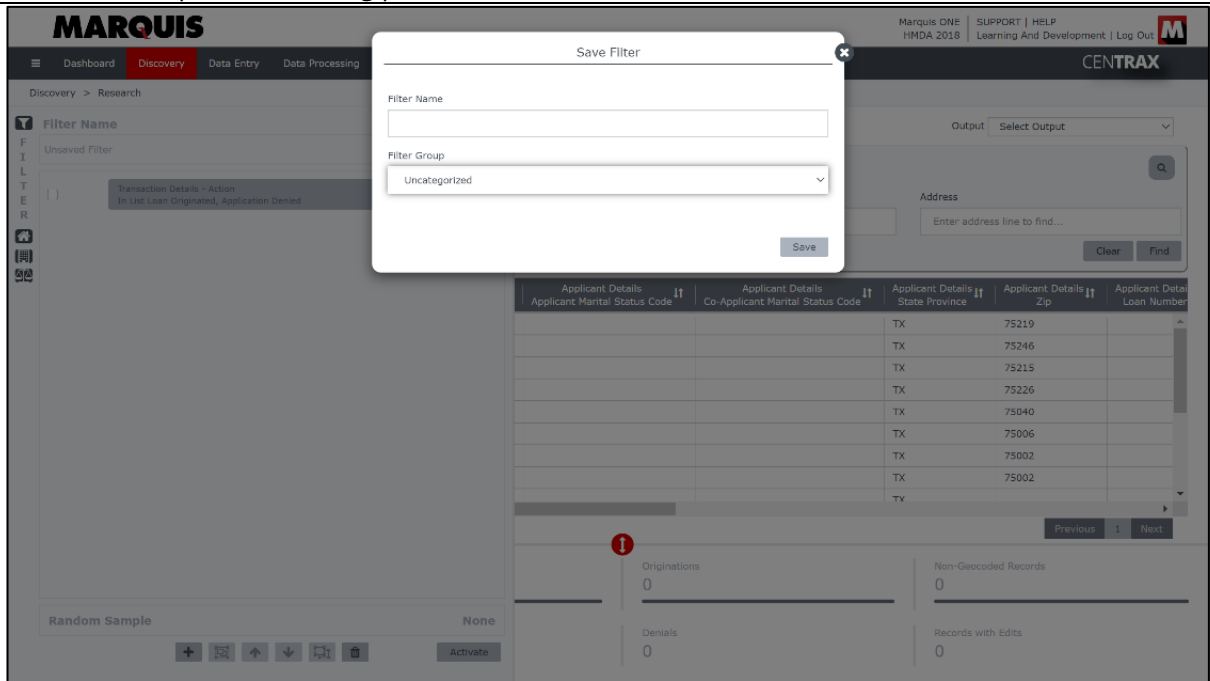
**Step 20** To save the filter, click the **Save** button. If the **Filter** window is out of view, click the **Filter** icon  again.

**Note:** Saving a filter will allow for commonly built filters to be retained within a list that can be easily applied rather than needing to be continuously rebuilt. Save frequently used filters to save time and steps needed for identifying specific records.

20.1 Type a unique **Filter Name**.

20.2 If desired, click the drop-down arrow to select a **Filter Group** OR type in a new **Filter Group Name**.

20.3 Click **Save** to complete the saving process.



The screenshot displays the MARQUIS software interface. A 'Save Filter' modal window is centered, prompting for a 'Filter Name' and a 'Filter Group' (currently set to 'Uncategorized'). A 'Save' button is at the bottom right of the modal. In the background, the 'Discovery' tab is active, showing a table with columns for 'Applicant Details' and 'Applicant Details'. The table contains several rows of data, including 'Applicant Marital Status Code', 'Co-Applicant Marital Status Code', 'State Province', 'Zip', and 'Loan Number'. A search bar is visible at the top right of the interface.

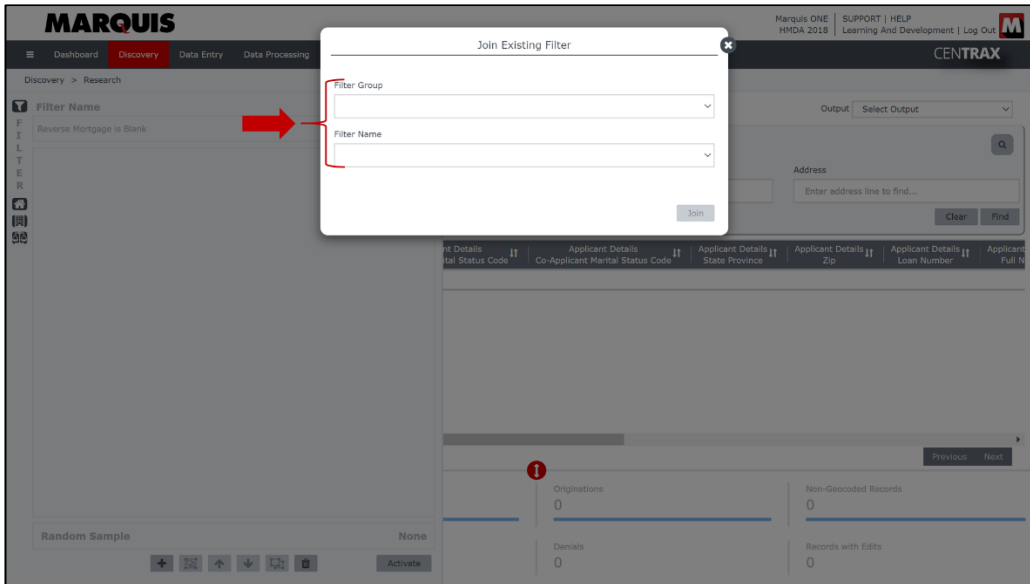







**Note:** The system will automatically activate the filter after the saving process has completed.

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<b>Step 21</b>	To open an existing filter, within the Filter window click the drop-down arrow next to <b>Save</b>
21.1	Select <b>Open</b>
21.2	Click in the <b>Search</b> box to type in a name of a filter, or click on the drop-down arrow by <b>Filter Group</b> to isolate filters within a specific group.
21.3	Click the filter once to <b>select</b> it.
21.4	Once selected, the filter will automatically activate.

Name	Fields	# of Records	Last Activation Date	Last Changed By	Last Changed Date
Originated and Denied Applications	Transaction Details - Action	138	08/03/2020	learning	07/30/2020
Philadelphia AA Tract Group	Tract Groups - Tract Group	76		feliciat	05/28/2020
Records not in current year		184	07/13/2020	learning	07/13/2020
Reverse Mortgage is Blank	HMDA (Loan) - Reverse Mortgage Option	0		learning	07/05/2020

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<b>Step 22</b>	To join another saved filter to the filter within the window, click the drop-down arrow next to <b>Save</b>
22.1	Select <b>Join Existing Filter</b>
22.2	Click the drop-down arrow next to <b>Filter Group</b> to select the group.
22.3	Click the drop-down arrow next to <b>Filter Name</b> to see the list of filters in the selected group.
22.4	<b>Highlight</b> the desired filter to be joined.
22.5	Click the <b>Join</b> button on the bottom left of the box.
	The filter that is joined will be appended to the bottom of the filter conditions within the filter window
	
<b>Step 23</b>	To remove ALL filter condition boxes within the window, click the  button at the bottom of the filter window
<b>Note:</b> CenTrax Next also has some short cuts to assist with making filtering quicker and easier. On the left-hand side of the Filter window, there are 3 Fast Filter buttons:  Fast HMDA,  Fast CRA, and  Fast Fair Lending	
<b>Step 24</b>	To utilize the Fast Filter options, click on the appropriate <b>icon</b> , depending on which group is desired
	<ul style="list-style-type: none"> <li> Fast HMDA</li> <li> Fast CRA</li> <li> Fast Fair Lending</li> </ul>
24.1	Place a check mark in any box next to a desired status or field content to <b>select</b> it
24.2	Type in any numeric value in the <b>From</b> and <b>To</b> boxes within any desired numeric fields in order to establish a range
24.3	Type in or select any date ranges in the <b>From</b> and <b>To</b> within any desired date fields in order to establish a date range

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**Step 25** Once all desired selections are made, click the **Add to Filter** button located in the bottom right hand corner of the Fast Filter page

The screenshot displays the MARQUIS HMDA Fast Filter interface. The top navigation bar includes links for Dashboard, Discovery (active), Data Entry, Data Processing, Filing, Settings, and Administration. The main content area is titled 'HMDA Fast Filter' and contains several filter categories. The 'Date Ranges' section is highlighted with a red box, showing a date range from 01/01/2018 to 06/30/2018. The 'Add to Filter' button is visible in the bottom right corner.

25.1 This will bring up the filter conditions window with all of the selected conditions in place

**Step 26** Repeat the filter building options mentioned above to make changes to the connector, group conditions, or remove any

**Step 27** Click **Activate** once the filter is built as desired