
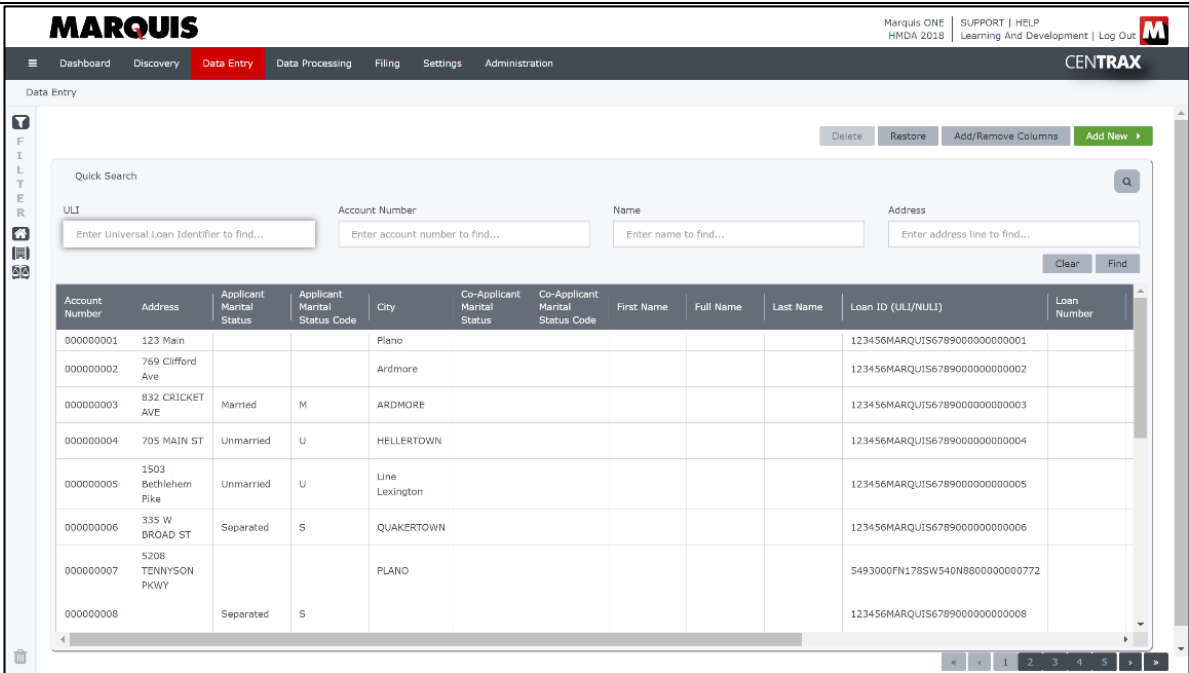



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| CNX502 | Research – Filtering Overview |
| | Filtering is used to isolate specific records for analysis purposes, data audits and select processes/reports as well as various areas within the CenTrax Next platform. |
| Order of Steps | Tasks |
| Step 1 | Log into CenTrax Next |
| | The active Institution and File will display in the upper right-hand section to the left of the name of the user logged in |
| Step 2 | Click on Data Entry from the main menu list |
| Note: 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, skip to Step 6 . | |
| Step 3 | Click the Quick Search magnifying glass icon  to expand the quick search bar |
| Step 4 | Use the Quick Search bar to easily locate records, by entering in at least one or any combination of: <ul style="list-style-type: none"> • ULI • Account Number • Name • Address |
| |  <p>The screenshot shows the MARQUIS Data Entry interface. At the top, there's a navigation bar with 'Dashboard', 'Discovery', 'Data Entry' (highlighted), 'Data Processing', 'Filing', 'Settings', and 'Administration'. Below this is a 'Quick Search' section with four input fields: 'ULI', 'Account Number', 'Name', and 'Address'. Each field has a placeholder text: 'Enter Universal Loan Identifier to find...', 'Enter account number to find...', 'Enter name to find...', and 'Enter address line to find...'. There are 'Clear' and 'Find' buttons. Below the search fields is a table with the following columns: Account Number, Address, Applicant Marital Status, Applicant Marital Status Code, City, Co-Applicant Marital Status, Co-Applicant Marital Status Code, First Name, Full Name, Last Name, Loan ID (ULI/NULL), and Loan Number. The table contains 8 rows of data. At the bottom left, there's a 'FILTER' icon and a '+' button to add new filter conditions.</p> |
| Step 5 | Click the Find button to locate and display the qualifying record(s) |
| Step 6 | Click the Filter  icon to open the filter fly-out window |
| Step 7 | To create a three-step filter, click on the + located on the bottom left-hand side of the page to add a new filter condition box |
| Step 8 | Click on the empty condition box and a three-step box will appear containing: Field, Operator and Value |
| Step 9 | Select a Field |
| 9.1 | Click the drop-down arrow in the Field box |
| 9.2 | Click on a field to select it |

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Note: A search function can be applied by type 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.

Step 10 Select an **Operator**

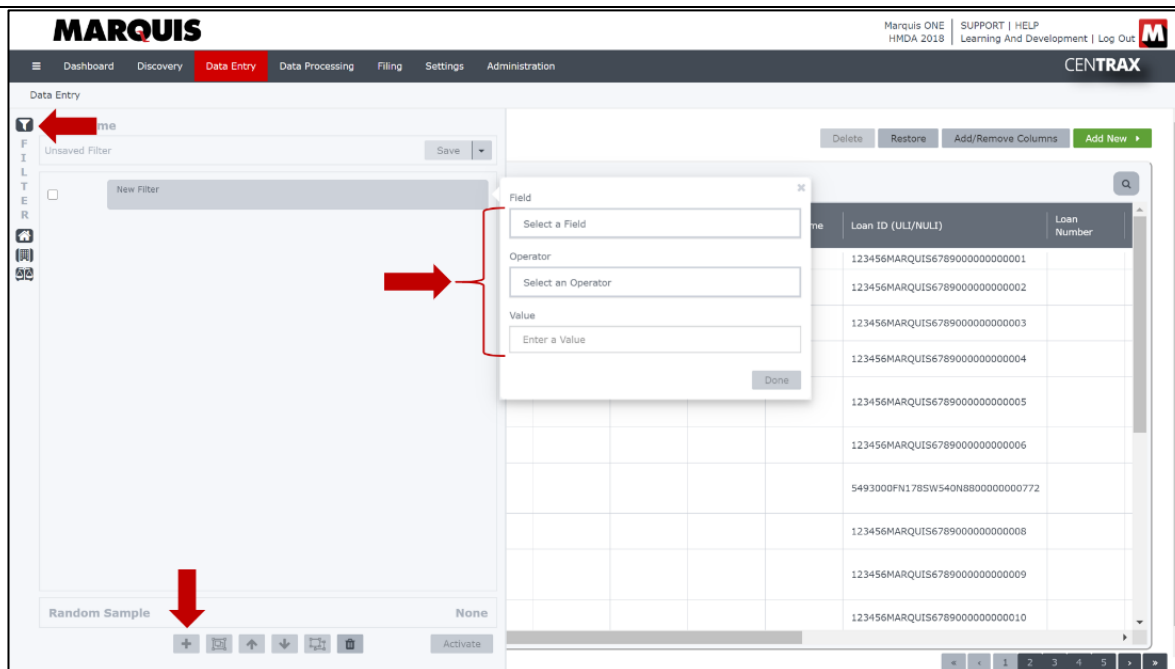
- 10.1 Click the drop-down arrow in the **Operator** box
- 10.2 Click to select the desired Operator from the drop-down menu.

Step 11 Select the **Value(s)**

- 11.1 Type in the **Value** or click the drop-down arrow to select a lookup value if the field contains any lookup values available
- 11.2 If more than one value is desired, click the plus symbol within the **Value**

Note: Typing in the box will apply the search function to make it easier to locate specific values.


Step 12 Click **Done** once all selections are made




Step 13 To add more filter conditions, click on the **+** and another conditions box will appear

- 13.1 The default connector is **AND**
- 13.2 To switch it to **OR**, click on the connector to toggle between connector options
- 13.3 Follow **Steps 8-12** for building the filter condition

Step 14 To group 2 or more **OR** statements, place a **check mark** in the boxes to the left of the filter condition boxes

- 14.1 Click the **Group Conditions** button , located directly to the right of the plus symbol

Step 15 To ungroup conditions, place a **check mark** in the boxes to the left of each filter condition box that has been grouped.

- 15.1 Click the **Ungroup Conditions** button , located directly to the left of the trash can symbol

Step 16 To remove a filter condition, click the **X** in the upper right-hand corner of the condition box

The screenshot shows the MARQUIS Data Entry interface. On the left, a 'Filter Name' window is open, displaying a list of filter conditions. The conditions are: 'Geocode - Applied Demographics - Tract Income Level In List Low, Moderate', 'Geocode - Applied Demographics - HMDA Income Level In List 50% - < 60%, 60% - < 100%', 'Transaction Details - Action In List Originated', and 'Transaction Details - Action Equal to Application Denied'. A red box highlights the 'X' icon in the upper right-hand corner of the condition box. A red arrow points to the 'Activate' button at the bottom right of the filter window. The main data table on the right shows columns for 'Loan ID (LILI/NULI)' and 'Loan Number'.

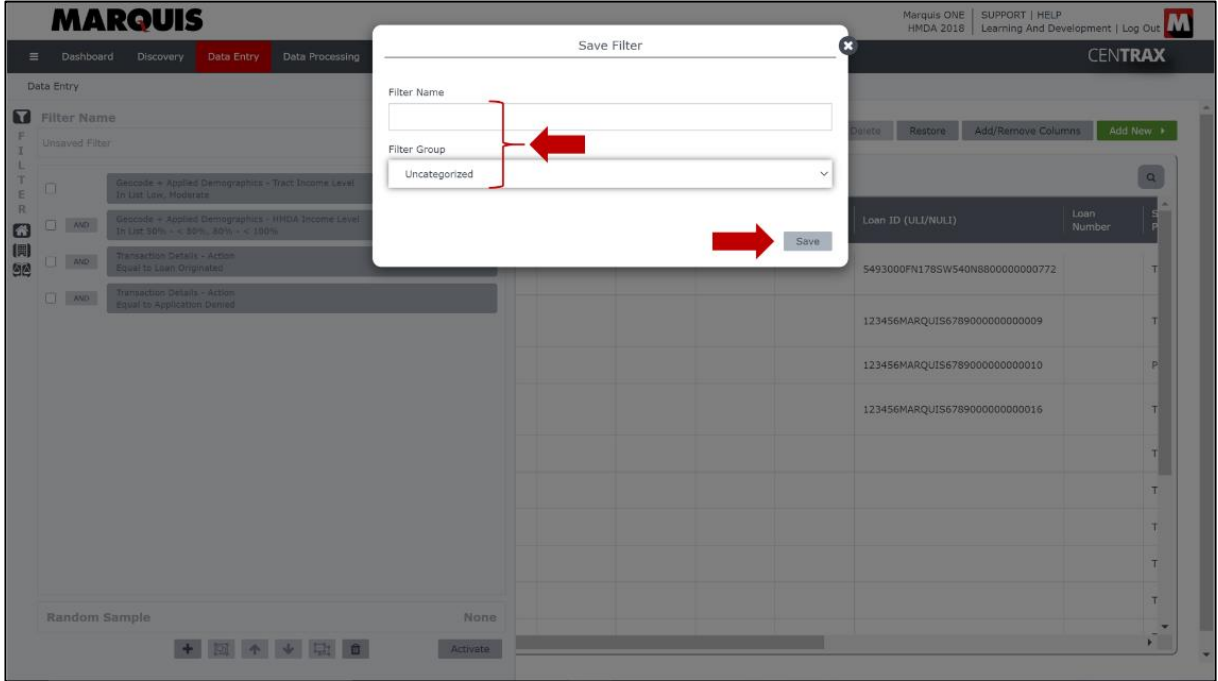
| Loan ID (LILI/NULI) | Loan Number |
|---------------------------------|-------------|
| 123456MARQUIS6789000000000001 | |
| 123456MARQUIS6789000000000002 | |
| 123456MARQUIS6789000000000003 | |
| 123456MARQUIS6789000000000004 | |
| 123456MARQUIS6789000000000005 | |
| 123456MARQUIS6789000000000006 | |
| 5493000FN1785W540N8800000000772 | |
| 123456MARQUIS6789000000000008 | |
| 123456MARQUIS6789000000000009 | |
| 123456MARQUIS6789000000000010 | |

Step 17 To apply the filter just built, click the **Activate** button on the bottom right-hand side of the filter box

17.1 The filter window will collapse, displaying those records that match the filter criteria just activated

17.2 If the **Filter** window doesn't slide out of view, click the **Filter** icon to collapse and view the qualified records

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| Step 18 | To save the filter, click the Save button |
| Note: Saving a filter will allow for commonly used filters to be retained within a list that can be easily applied rather than needing to be continuously rebuilt. | |
| 18.1 | Click the drop-down arrow to select a Filter Group OR type in a new Filter Group Name |
| 18.2 | If a desired Filter Group does not exist, simply type in a new Filter Group Name |
| 18.3 | Type in a unique Filter Name |
| 18.4 | Click Save to complete the saving process |
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| Note: The system will automatically activate the filter after the saving process has completed. | |

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| Step 19 | To open an existing filter, within the Filter window click the drop-down arrow next to Save |
| 19.1 | Select Open |
| 19.2 | Click in the Search box to type in a name of a filter, or click on the drop-down arrow by Filter Group to isolate filters within a specific group |
| 19.3 | Click on the filter once to select it |
| 19.4 | Once selected, the filter will automatically activate |

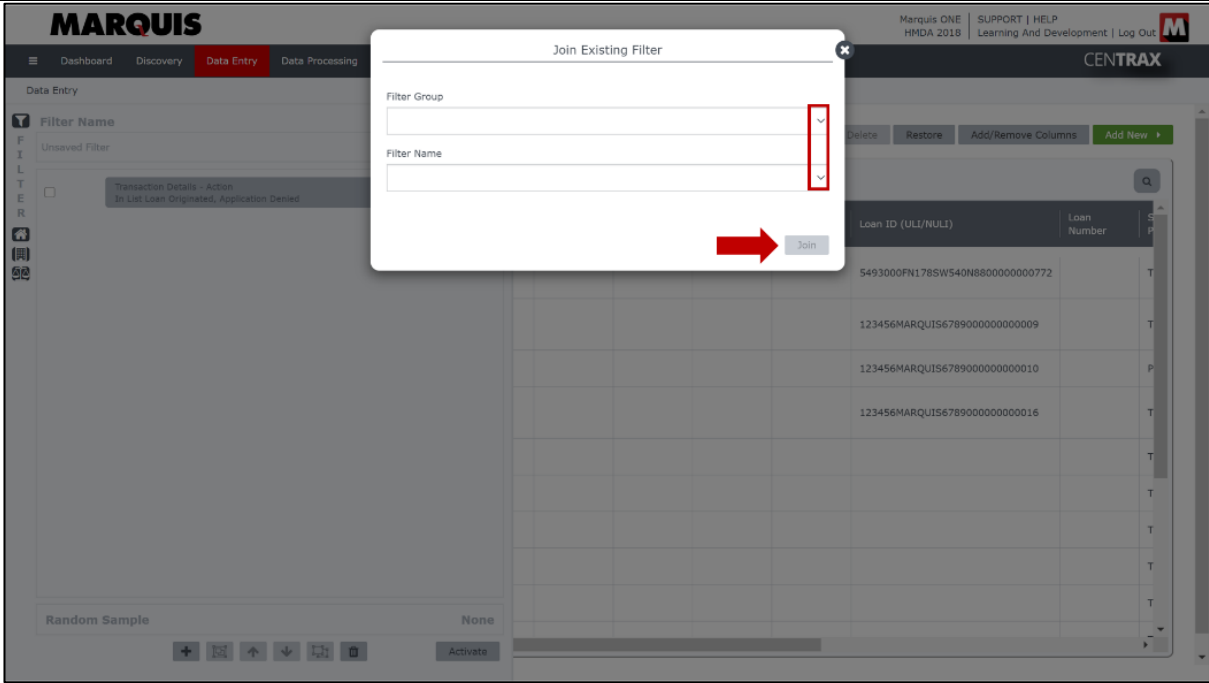




Open Filter

Filter Group Search




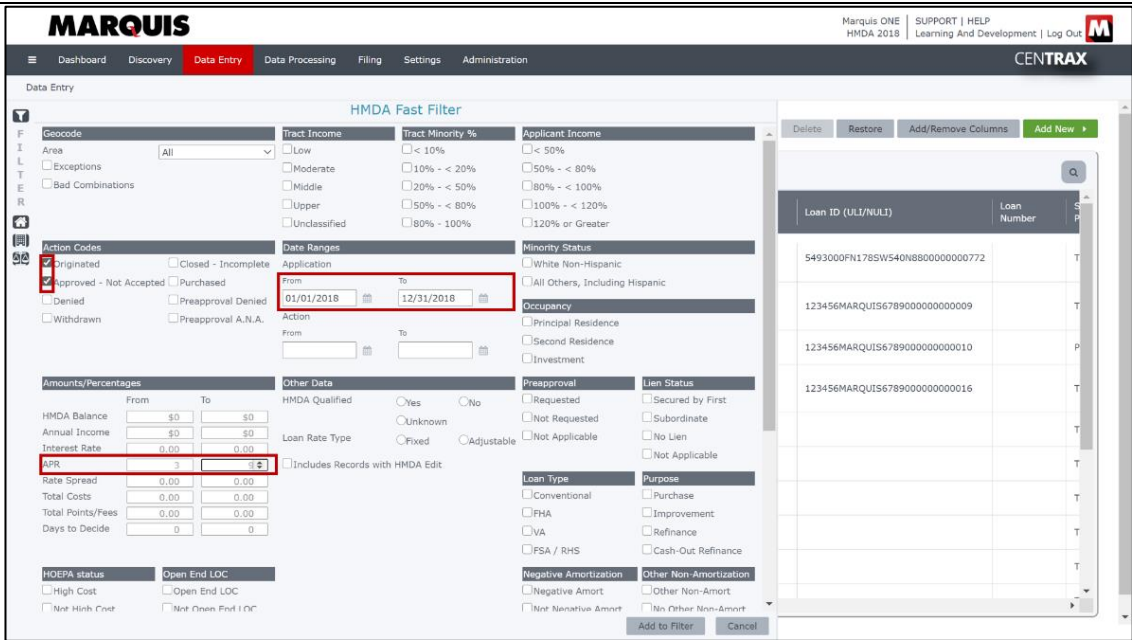
| Name | Fields | # of Records | Last Activation Date | Last Changed By | Last Changed Date |
|------------------------------------|--|--------------|----------------------|-----------------|-------------------|
| Originated and Denied Applications | Transaction Details - Action | 138 | 08/03/2020 | learning | 07/30/2020 |
| Philadelphia AA Tract Group | Tract Groups - Tract Group | 76 | | feliciat | 05/28/2020 |
| Records not in current year | Transaction Details - Application Date | 184 | 07/13/2020 | learning | 07/13/2020 |
| Records not in current year | Transaction Details - Application Date | 177 | | learning | 07/05/2020 |
| Reverse Mortgage is Blank | HMDA (Loan) - Reverse Mortgage Option | 0 | | learning | 07/05/2020 |
| Reverse Mortgage is Blank | HMDA (Loan) - Reverse Mortgage Option | 0 | | learning | 07/05/2020 |

Random Sample None

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| Step 20 | To join another saved filter to the filter within the window, click the drop-down arrow next to Save |
| 20.1 | Select Join Existing Filter |
| 20.2 | Click the drop-down arrow next to Filter Group to select the group |
| 20.3 | Click the drop-down arrow next to Filter Name to see the list of filters in the selected group. |
| 20.4 | Highlight the desired filter to be joined |
| | Click the arrow next to the save button at the top of the filter window |
| 20.5 | Select the Join Existing Filter option from the drop-down menu |
| | The filter that is joined will be appended to the bottom of the filter conditions within the filter window |
| |  |
| Step 21 | To remove ALL filter condition boxes within the window, click the  button at the bottom of the filter window. |
| Note: CenTrax NEXT also has short cuts to assist with locating and applying commonly used filters more quickly. On the left-hand side of the Filter window, there are 3 Fast Filter buttons:  Fast HMDA,  Fast CRA, and  Fast Fair Lending. | |

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| Step 22 | To utilize the Fast Filter options, click on the appropriate icon , depending on which group is desired |
| | <ul style="list-style-type: none">  Fast HMDA |
| | <ul style="list-style-type: none">  Fast CRA |
| | <ul style="list-style-type: none">  Fast Fair Lending |
| 22.1 | Place a check mark in any box next to a desired status or field content to select it |
| 22.2 | Type in any numeric value in the From and To boxes within any desired numeric fields in order to establish a range |
| 23.3 | Type in or select any date ranges in the From and To within any desired date fields in order to establish a date range |
| Step 24 | Once all desired selections are made, click the Add to Filter button located in the bottom right hand corner of the Fast Filter page |
| |  |
| 24.1 | This will bring up the filter conditions window with all of the selected conditions in place |
| Step 25 | Repeat the filter building options mentioned above to make changes to the connector, group conditions or remove any conditions as needed |
| Step 26 | Click Activate once the filter is built as desired |