

Tutorial

Objective: Making a Global Change to Your Data using an Action Filter.

Scenario: You have noticed that several People in your database have FM as their Specialty. You would like to globally change FM to Family Medicine. You can do this by using an Action Filter.

Step 1: Click the People Listing tab. (Fig. A)

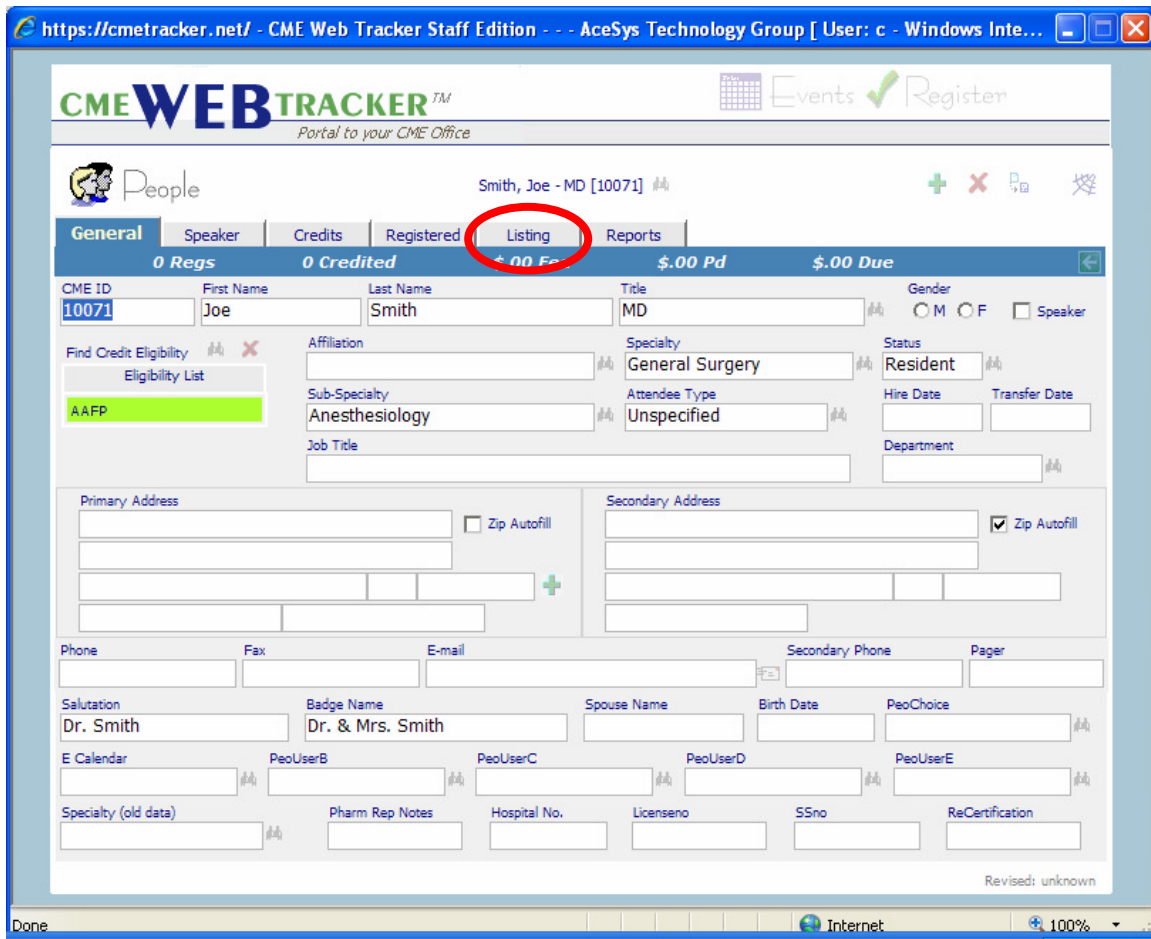


Fig. A

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Step 2: Click the Find Filter binoculars to select your personal filter. (**Fig. B**)

Note: See Tutorial "Filtering Getting Started" to learn how to create your personal filter.

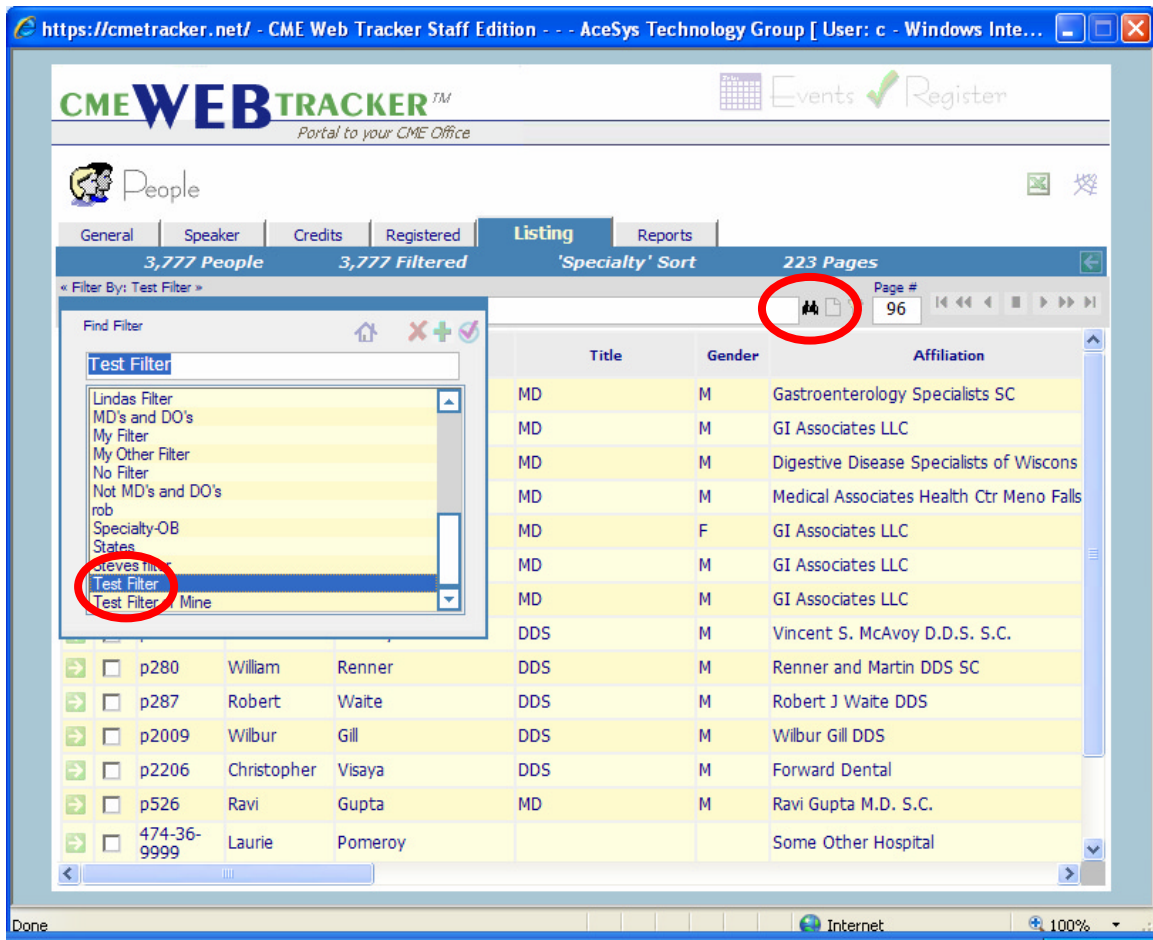


Fig. B

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Step 3: Click on <<Filter By: Test Filter >>. (Fig. C)

Note: This is only the name of YOUR filter. It will not filter the data until you put in filtering criteria.

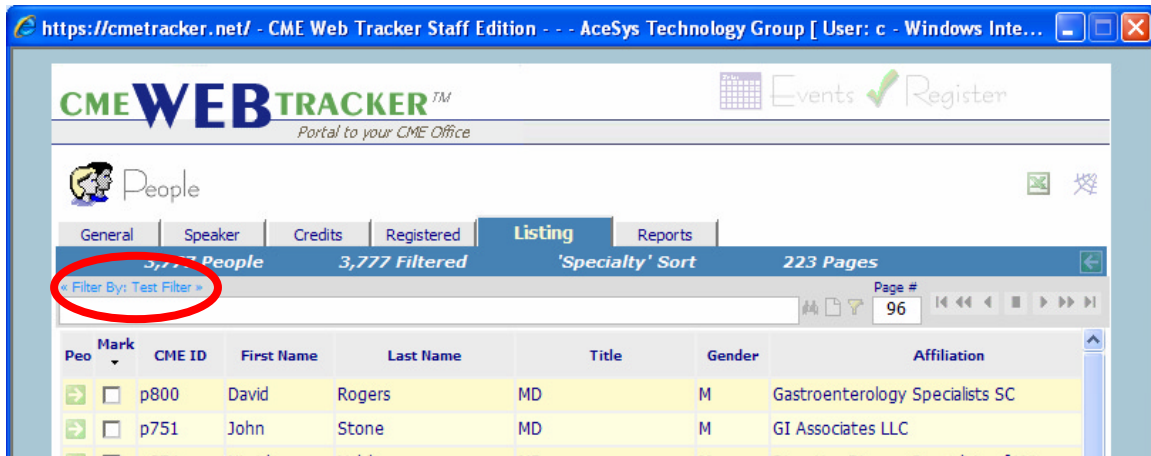


Fig. C

Step 4: The Find Field Name dropdown appears. Select Specialty from the Dropdown list. (Fig. D)

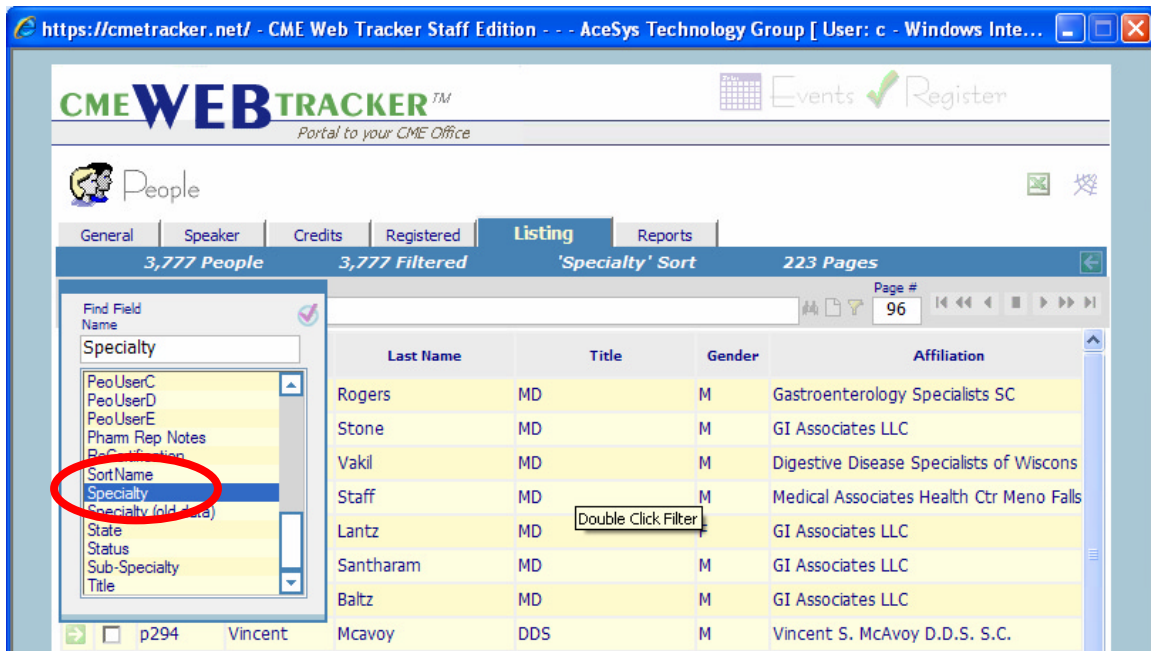


Fig. D

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Step 5: {Specialty} now appears in the Filter text box. Type in FM. Click the Set Filter Icon. You now have a listing of all the People in your database that have FM as their Specialty. (Fig. E)

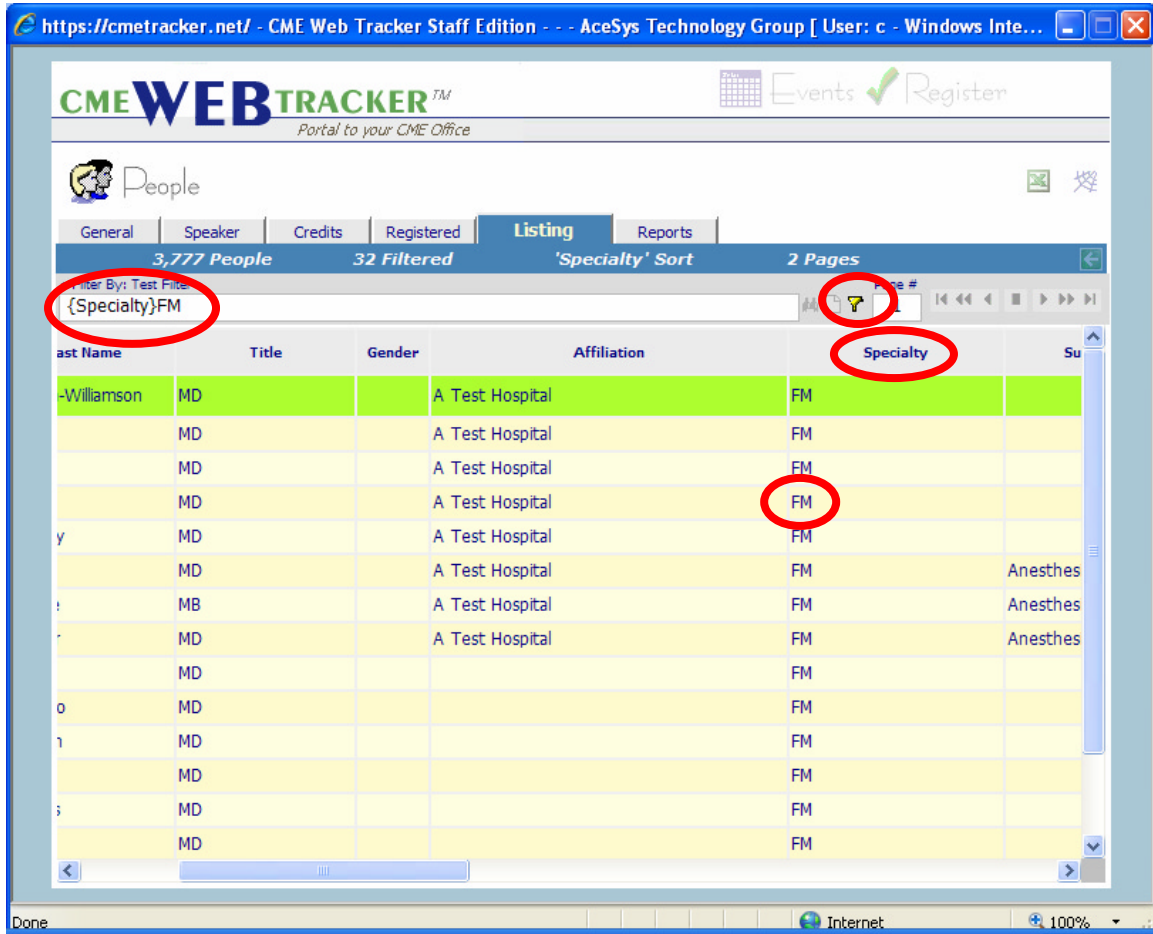


Fig. E

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Step 6: Now you are ready to activate an "Action Filter". To create your action filter, first Type in a "Pipe" |. (shift-backslash) Then type {Specialty}=Family Medicine. Here is what it will look like when typed in the text box: {Specialty}FM|{Specialty}=Family Medicine. Click the Set Filter icon. (Fig. F)

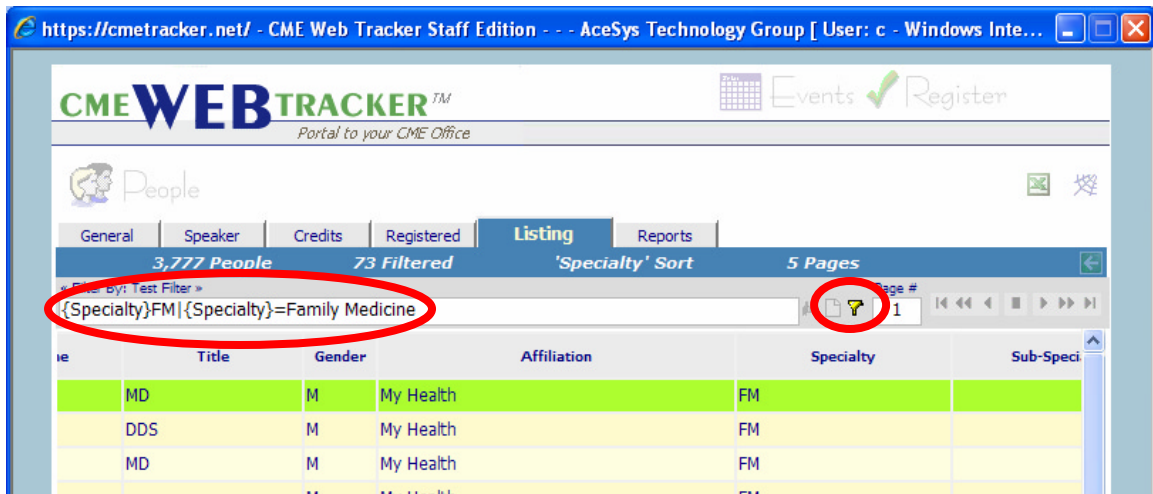


Fig. F

Step 7: The following popup appears. Click OK. (Fig. G)

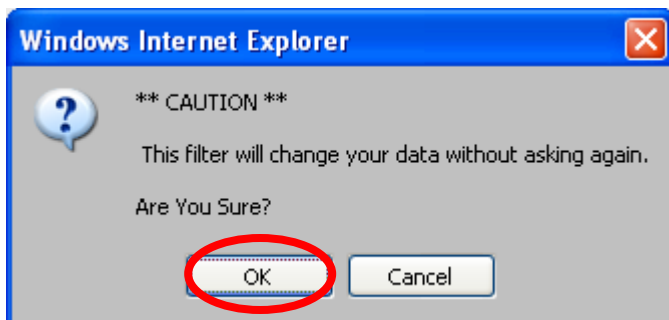


Fig. G

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Step 8: You will see the following on your screen:
******No People in This View******. Click the Clear filter Icon to view the complete People Listing. ([Fig. H](#))

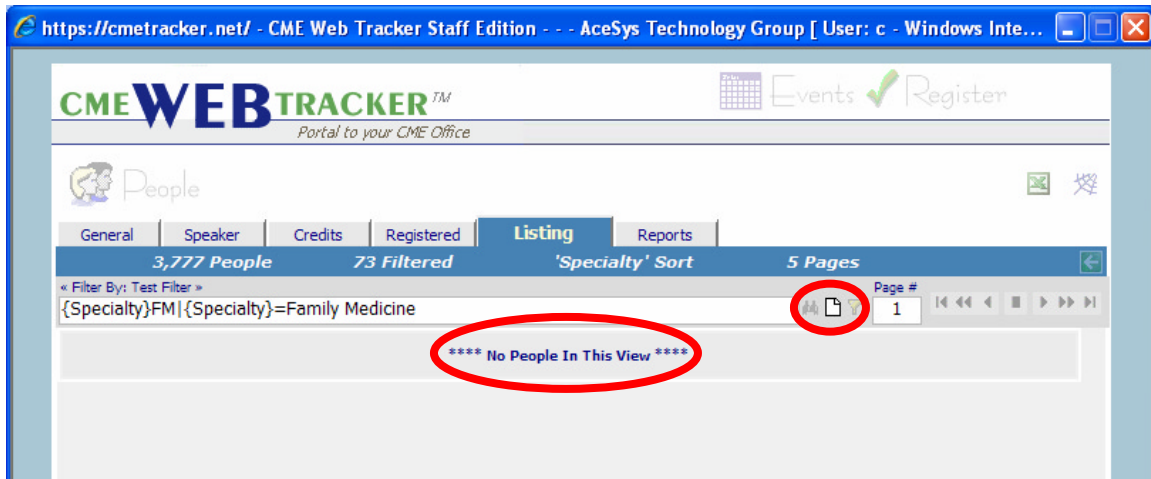


Fig. H

Step 9: The Specialty FM has been globally changed to Family Medicine using an Action Filter. ([Fig. I](#))

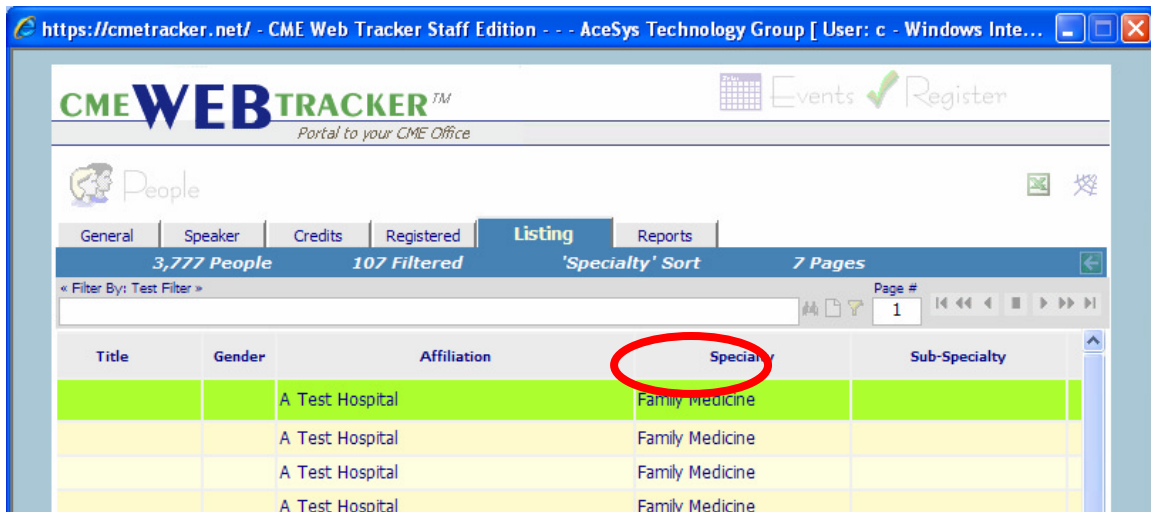


Fig. I