

Introduction

This document is a step-by-step guide to successfully use Filters and Saved Filters in Access Unify® | Records (“Unify Records”).

What are Filters?

Filters allow users to narrow large record sets into meaningful subsets of data. Filters are applied at the column level within an Inventory and can be combined across multiple fields.

What are Saved Filters?

Saved Filters allows users to store frequently used filter configurations for future use. Saved Filters allow users to reuse active filters without recreating each filter every time. Saved Filters may be marked as Private (visible only to the creator) or Public (available to all users in your organization).

Before you begin

Screenshots provided in this set up guide may appear different than your Unify Records screens, either due to different permissions, field configurations, or browser settings.

Filters and Saved Filters: A User Guide

Applying, Modifying, and Removing Filters

This section will walk through applying, modifying, and removing filters to your Inventory. In Unify Records, filters are accessed from the row beneath the column headers within the Inventory grid. Each column provides a filter icon that opens the filter fly-out menu.

Filters are dynamic by their nature, meaning that as new records exist or metadata gets updated, the result set returned by a filter may change over time. The exception to this is applying filters on a unique value, such as a box barcode.

Information

Operators available for Text Fields:

- **Equals** – exact match
- **Contains** – partial match
- **Is Blank** – no value
- **Is Not Blank** – any value present
- **Is Any** – comma-separated exact match list

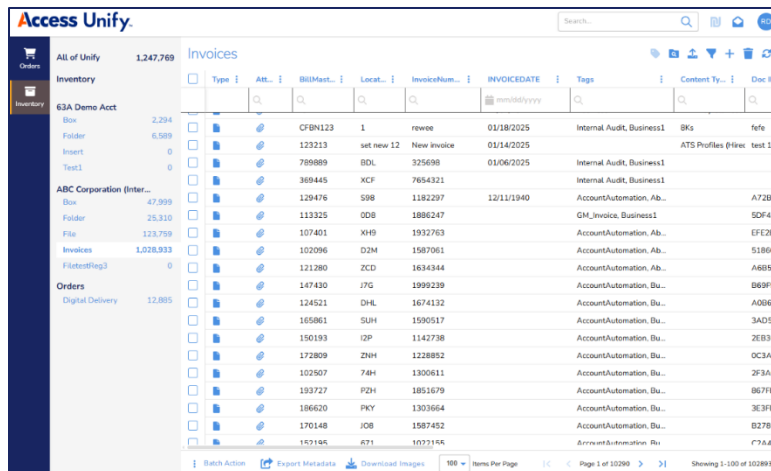
Operators available for Date Fields:

- **Equals** – exact match
- **Before** – prior to selected date
- **After** – later than selected date
- **Between** – within selected date range

Actions – applying a filter

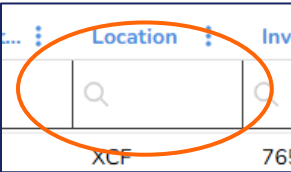
Action Log into Unify Records, if not already logged in.

Orientation Navigate to the Inventory that has the records you want to filter.

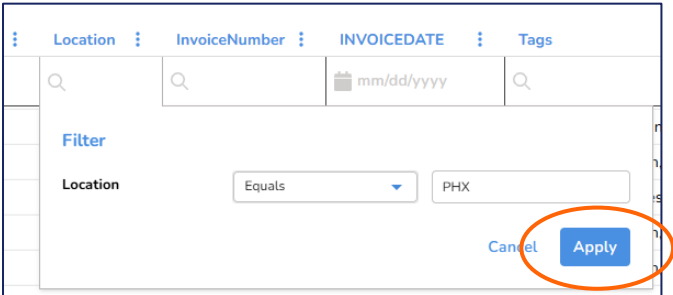


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Action Click in the row just beneath the column header, the cell with the search icon.

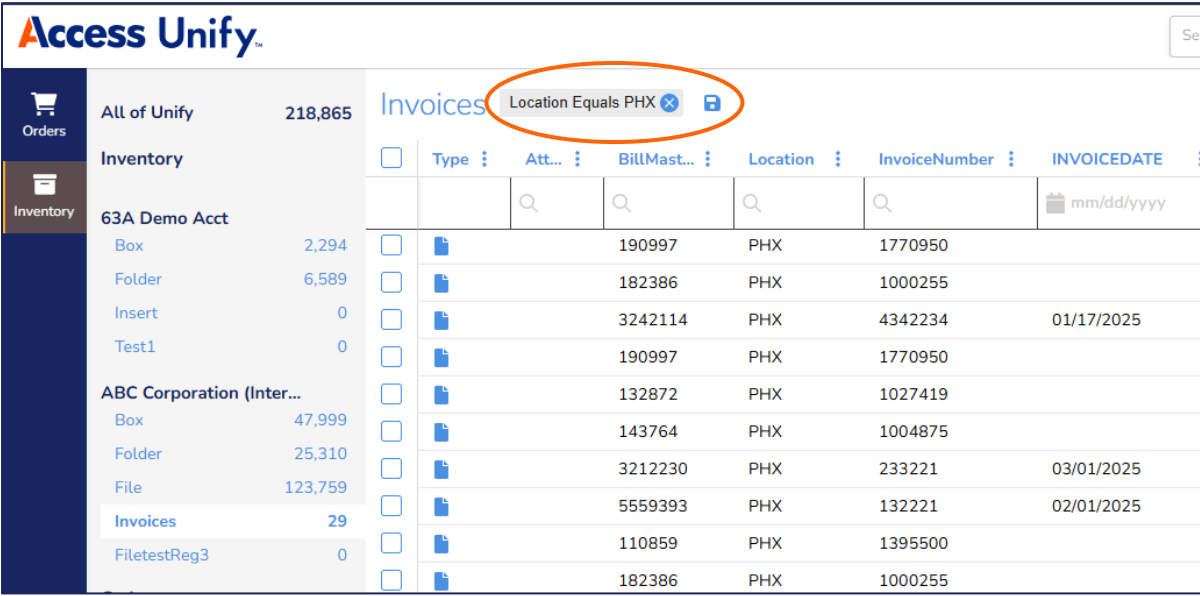


Action In the Filter fly-out menu, choose the operator and then enter the search term. Click 'Apply'.



NOTE: the search term is not case sensitive

Orientation You should have a filter set of records in the grid that matches the provided search term. You should also see the current filter at the top of the grid.

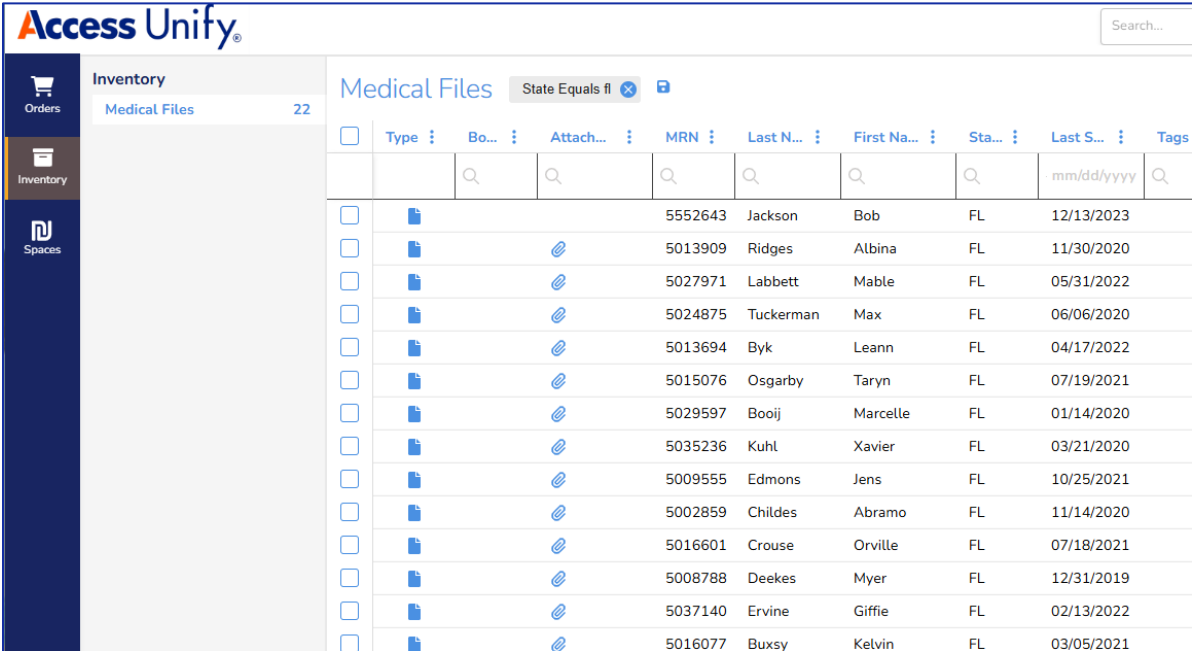


INFORMATION: Multiple fields can be filtered simultaneously.

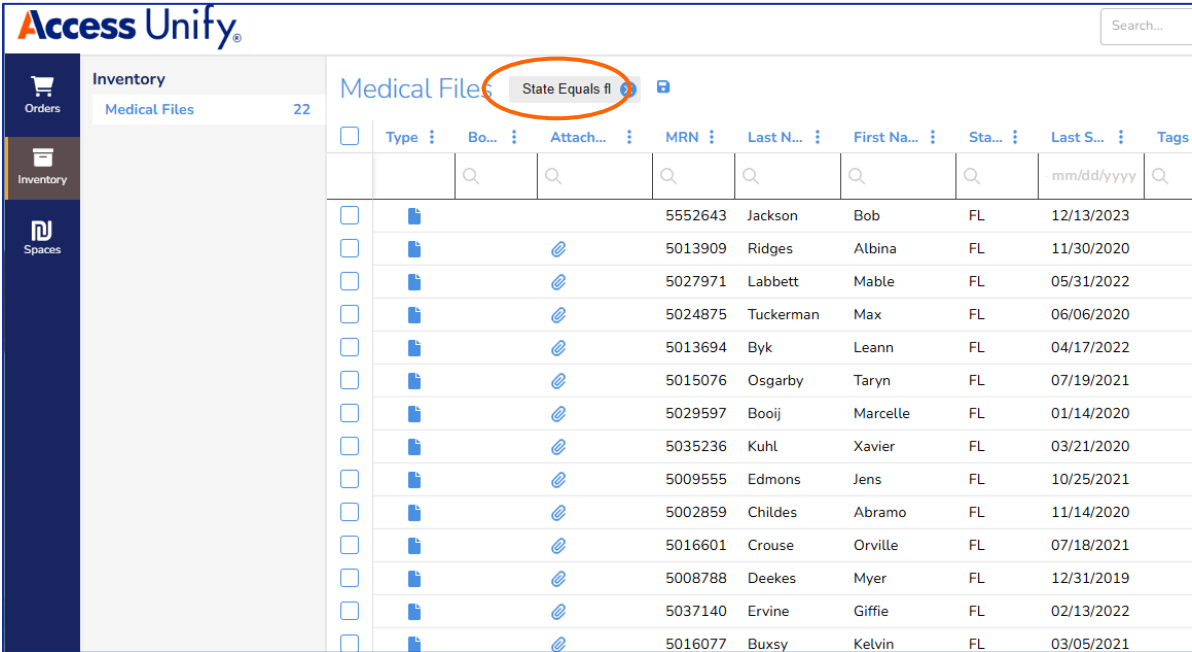
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Actions – modifying an applied filter

Orientation Ensure the Inventory has a filter applied.



Action Click the filter label.



Action In the Filter fly-out menu, modify the operator or search term. Click 'Apply'.

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NOTE: the search term is not case sensitive

Orientation You should have a filter set of records in the grid that matches the newly provided search term. You should also see the current filter at the top of the grid.

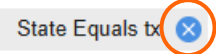
Actions – removing an applied filter

Orientation Ensure the Inventory has a filter applied.

A screenshot of the Access Unify interface showing a table of medical files. The filter 'State Equals fl' is applied. The table has columns for Type, Bo..., Attach..., MRN, Last N..., First Na..., Sta..., Last S..., and Tags. The data rows include patient information such as MRN, name, and state.

Type	Bo...	Attach...	MRN	Last N...	First Na...	Sta...	Last S...	Tags
			5552643	Jackson	Bob	FL	12/13/2023	
			5013909	Ridges	Albina	FL	11/30/2020	
			5027971	Labbett	Mable	FL	05/31/2022	
			5024875	Tuckerman	Max	FL	06/06/2020	
			5013694	Byk	Leann	FL	04/17/2022	
			5015076	Osgarby	Taryn	FL	07/19/2021	
			5029597	Booij	Marcelle	FL	01/14/2020	
			5035236	Kuhl	Xavier	FL	03/21/2020	
			5009555	Edmons	Jens	FL	10/25/2021	
			5002859	Childes	Abramo	FL	11/14/2020	
			5016601	Crouse	Orville	FL	07/18/2021	
			5008788	Deekes	Myer	FL	12/31/2019	
			5037140	Ervine	Giffie	FL	02/13/2022	
			5016077	Buxsy	Kelvin	FL	03/05/2021	

Action Click the blue 'x' to remove the applied filter.



Orientation The Inventory grid will refresh.


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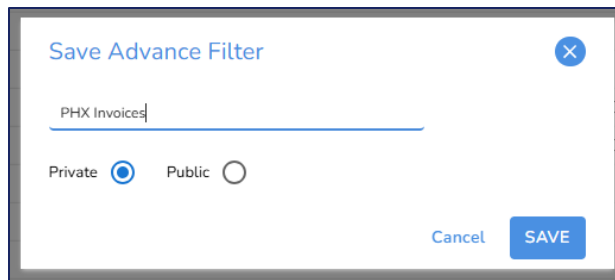
Saving an Applied Filter

This section will walk through saving and using saved filters to your Inventory. In Unify Records, saved filters are accessible via the 'action area' or set of icons at the top right of the Inventory grid. The saved filters icon is a folder icon with a magnifying glass.

Actions – Save a Filter

Action Apply one or more filters to an Inventory, if not already done.

Action If the results match your expectations, click the save icon  next to the active filter. A dialogue box will appear.



Action Enter a name for your filter and select 'Private' or 'Public'. Click 'Save'.

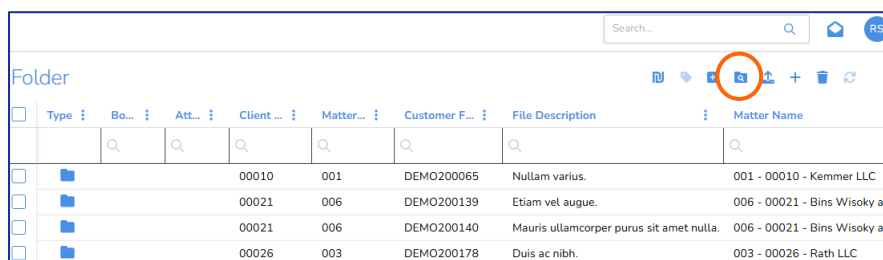
INFORMATION: Private saved filters are only visible for your user and cannot be edited or altered by other users. Public filters are available for all users of that Inventory.

Action Verify you received a 'Filter Saved' message.



Actions – using a Saved Filter

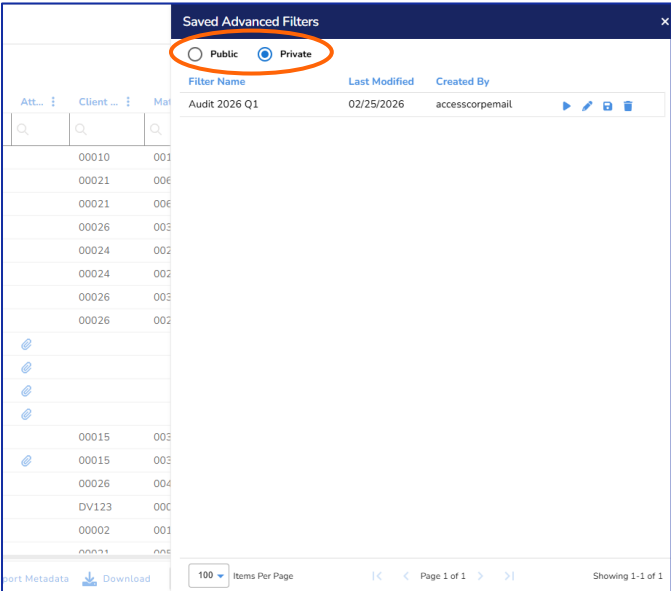
Action In the 'Action Area' above the grid, click the Saved Filter icon



Orientation A side panel with Public and Private filters will appear

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Action Click either the Public or Private radio button to locate the filter you wish to use.



Action Click the 'Apply' icon in the row for the saved filter you wish to use.



NOTE: the additional icons can be used to Edit the saved filter, Save As a new saved filter, or Delete the saved filter.

Orientation The Inventory grid will refresh with the filter criteria.

SUCCESS! You have successfully learned about filters.