

Adding Summaries to Reports

Let Apricot help you analyze your data

Welcome, we will start shortly!



Meet Your Trainer

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Learning Objective

This training will cover:

- Summary options in Native Reporting.
- How to add Summaries for different data.
- When a Summary Section is Needed.

By the end of this session, our goal is to arm you with the different Summary options you use to help your data tell they story of your impact.

Agenda

Summaries Overview

Section Counts

Column Summaries

Summary Sections

Best Practice Tips

Summaries Overview

Summaries Overview

- Feature in reporting to analyze and highlight key data
- Counts, Totals, Averages, Min / Max, Earliest / Latest

Options:

- Section Counts
- Column Summaries
- Summary Sections

Counseling - Group Session	Total Service Time in Hours 149.00	Distinct Participants Values 28	Row Count 78
Counseling - Individual Session	Total Service Time in Hours 45.00	Distinct Participants Values 17	Row Count 26
Family Coaching	Total Service Time in Hours 24.25	Distinct Participants Values 6	Row Count 10
Job Search Supports	Total Service Time in Hours 31.25	Distinct Participants Values 14	Row Count 20
Legal Assistance	Total Service Time in Hours 36.50	Distinct Participants Values 11	Row Count 17
Phone Consultation	Total Service Time in Hours 11.45	Distinct Participants Values 7	Row Count 10
Resource Session	Total Service Time in Hours 6.00	Distinct Participants Values 5	Row Count 6
			Total Rows 167

Section Counts

Section Counts

- Setting in Section Properties.
- Total Rows is default, but you can select any of the forms included.
- Can also opt to hide count.

Count

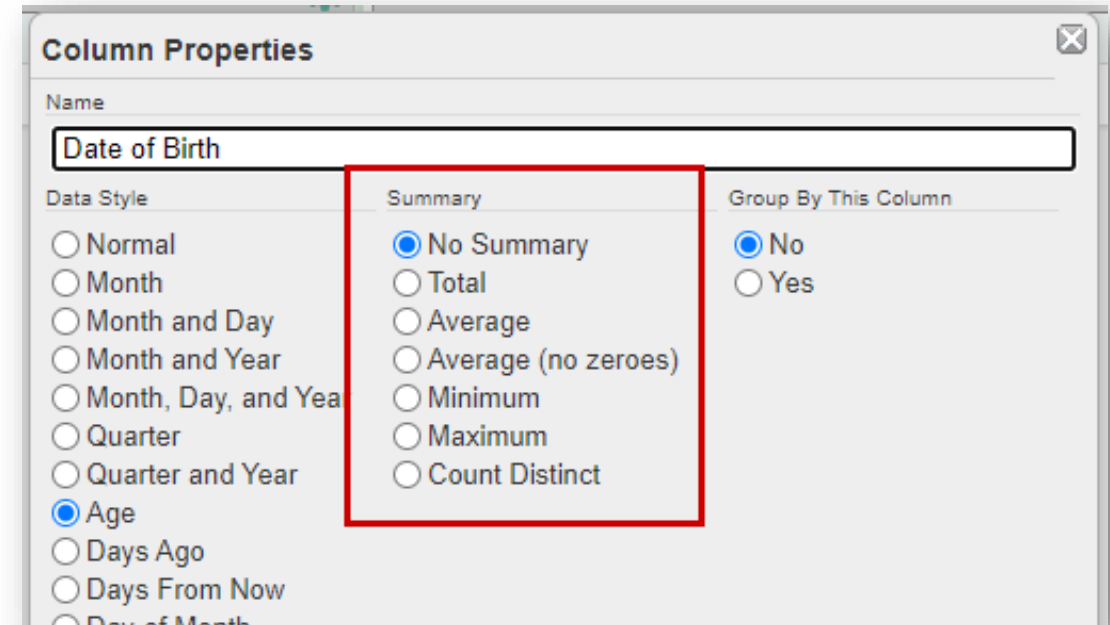
- Total Rows
- Participant Profile Records
- Individualized Service Records
- Suppress Total Row Count

▶ Active						Row Count 48
▶ Inactive						Row Count 4
▼ Waiting List						Row Count 2
Search <input type="text"/> <input type="button" value="Q"/> Displaying 2 of 2 Rows (Expand All Cells)						
Client Status ▼	Participants ▼	Age ▼	Gender ▼	Race ▼	Ethnicity ▼	
Waiting List	Sarah Greene (36)	36	Female	Black or African American	Non-Hispanic	
Waiting List	Jacob Smithers (38)	42	Male	Black or African American	Non-Hispanic	
	Distinct Participants Values 2	Average (no zeroes) Age 39				
						Total Rows 54

Column Summaries

Column Summaries

- Can be applied to most columns, but options vary by type of data.
- Most useful with **Numeric** fields and **Date / Time** fields.



Count Distinct

- Recommended for showing **unduplicated count** of Participants.
- Use with a unique data point such as **Record ID**.
- Works even when Participants have multiple rows (for example with service or enrollment data).
- Not recommended for other types of text data unless you just need a count of answer choices selected (for example – Gender).

Column Properties

Name
Participants

Data Style Summary Group By This Column

Normal No Summary No

With Identifier Field(s) Count Distinct Yes

Custom Text

Custom Numeric

Formatting ▶

Form Info ▶

Delete Apply

Participants ▼
Luigi Jones (455)
Alonzo LaBatsille (456)
Heather Carter (624)
Rian Yu (695)
Distinct Participants Values
4

Totals Section View

- Option under Section **Display Styles** for **Totals** only.
- Ideal when coupled with **Grouping** for summaries by category.

Display Style

Hidden

Graph Only

Totals

Rows

Vertical

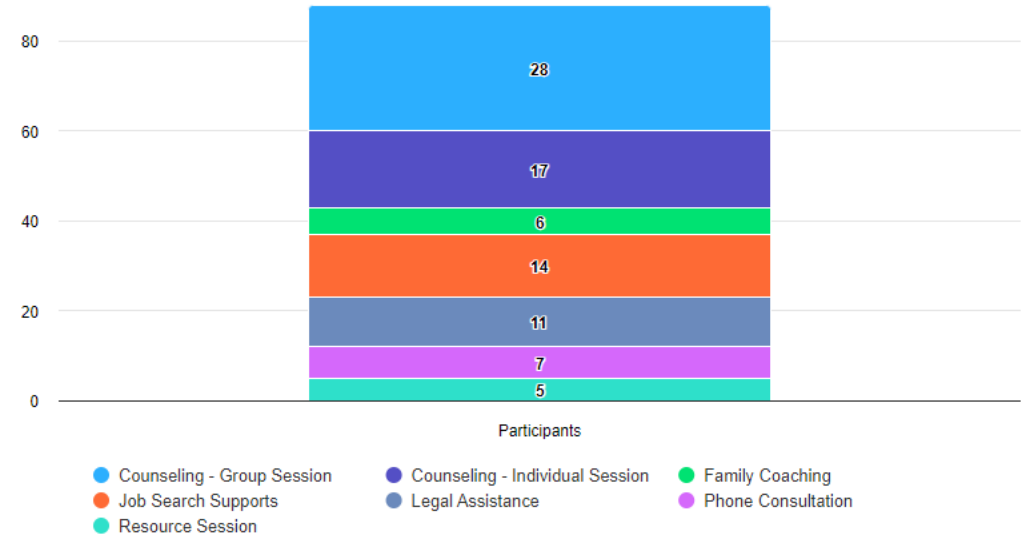
Counseling - Group Session	Total Service Time in Hours 149.00	Distinct Participants Values 28	Row Count 78
Counseling - Individual Session	Total Service Time in Hours 45.00	Distinct Participants Values 17	Row Count 26
Family Coaching	Total Service Time in Hours 24.25	Distinct Participants Values 6	Row Count 10
Job Search Supports	Total Service Time in Hours 31.25	Distinct Participants Values 14	Row Count 20
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Graphs with Summaries

Step 1: Enable Graph in Section Settings.

Step 2: Configure Summaries as Data Source.

Step 3: Select with Summaries to include.



	Total Service Time in Hours	Distinct Participants Values	Row Count
Counseling - Group Session	149.00	28	78
Counseling - Individual Session	45.00	17	26
Family Coaching	24.25	6	10
Job Search Supports	31.25	14	20
Legal Assistance	36.50	11	17
Phone Consultation	11.45	7	10
Resource Session	6.00	5	6

Summary Sections

Summary Sections

- Recommended for showing totals from different sections.
- Allows for top level, at a glance view of data.

Step 1: Build Sections to reference.

Step 2: Add New Section for Summary.

Step 3: Add Summary Column(s).

Step 4: Configure each column.

The screenshot displays the Apricot 360 Administrator interface. The top navigation bar includes the Apricot 360 logo, the user name 'Taylor Roderick', and the role 'ADMINISTRATOR'. The main content area is titled 'Client Count' and features a 'Global Values' section with an 'Add' button, a 'Client List' section, and a 'Summary Section' section. The 'Summary Section' is expanded to show 'Forms', 'Filters', and 'Limit Sections'. Below these sections, there is a message: 'Report last run August 2nd 2021, 1:31 pm. Click to refresh data. Auto run has been turned off for this section. Click here to turn it back on.' At the bottom, there are two columns: 'Section Count' and 'Section Summary', each with a gear icon for configuration. On the right side, there is a 'Field Choices' panel with a 'COLLAPSE ALL' button. The panel is expanded to show 'Special Columns' with sub-items 'Calculation Columns', 'Summary Columns', 'Section Summary', and 'Section Count'. An orange arrow points from the 'Section Summary' item in the 'Field Choices' panel to the 'Section Summary' column in the main content area. There are also orange circles with numbers 1, 2, and 3 highlighting specific elements: 1 is near the 'Add New Section' button, 2 is near the 'Add' button in the 'Global Values' section, and 3 is near the 'Section Summary' item in the 'Field Choices' panel.

Summary Columns

Section Count

Column Properties [Close]

Name: Section Count

Data Style: Normal, Custom Text, Custom Numeric

Summary: No Summary, Value

Group By This Column: No, Yes

Summary Type: Section Count

Choose a Section: --Select a Section--

Formatting >

[Delete] [Apply]

Section Summary

Column Properties [Close]

Name: Section Summary

Data Style: Normal, Custom Text, Custom Numeric

Summary: No Summary, Value

Group By This Column: No, Yes

Summary Type: Section Summary

Choose a Section: --Select a Section--

Choose a Column: --Select a Column--

This will not take group filters into account when calculating the summary value.

Formatting >

[Delete] [Apply]

Best Practices Tips

Best Practice Tips

1. Choose your **Summary Type(s)** based on the data your audience needs to see up front.
2. Remember to use Record ID from your Tier 1 with **Count Distinct** to see an unduplicated count.
3. Don't try to accomplish too much in one section. Use several and then a **Summary Section**.
4. Add **Calculation Columns** for additional analysis within a Summary Section.
5. **Outcomes Reporting** is an added way to use summaries to show progress toward goals.

Additional Resources

Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)
- [Bonterra Academy](#) – Free Webinars & Recordings
- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics
- [Admin Labs](#) – 2 Hour Live Trainings on Specific Capabilities
- [Private Training](#) – 1:1 Sessions with Training Expert in Your Apricot (End User & Admin Topics Available)

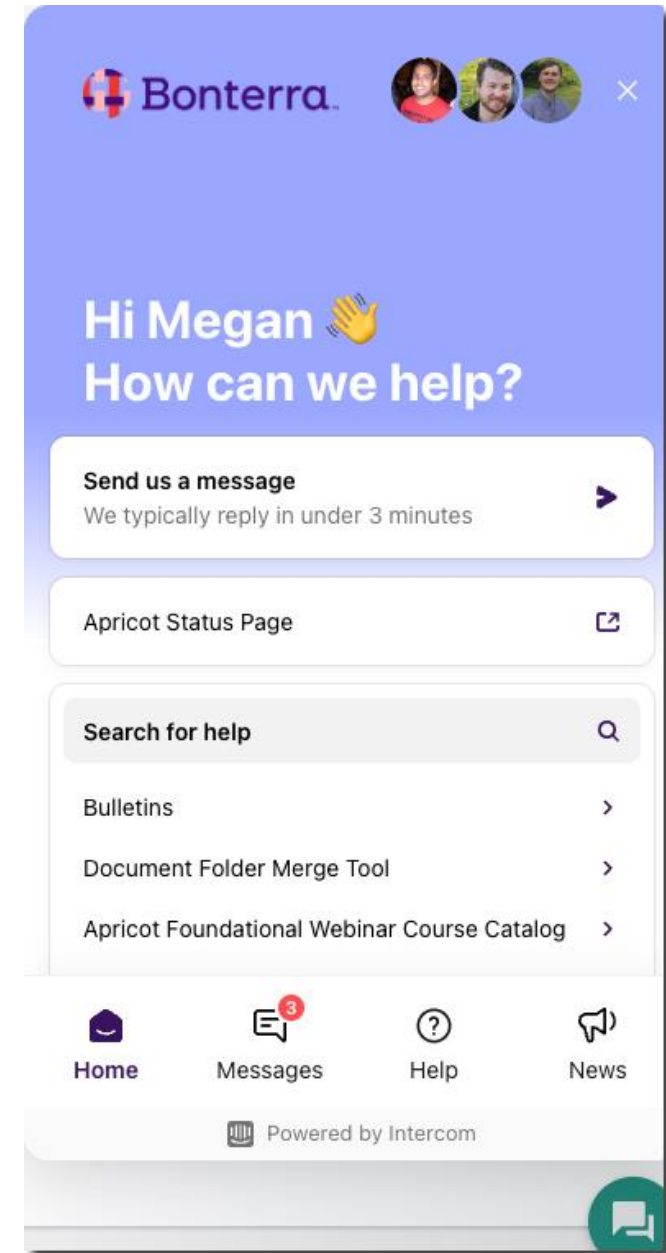


Build confidence & knowledge in
our software!

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Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email:
apricot@bonterratech.com



Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you
in future trainings.