

Gaining Insights from Survey & Assessment Data

Welcome, we will start shortly!

Meet Your Trainer

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Learning Objective

Our goal for this session is to give you strategies for reporting on your Surveys and Assessments to see trends, change over time and other insights.

Agenda

Overview

Calculations

Aggregation

Comparison

Overview

Reporting on Surveys & Assessments

Opportunity to turn **Qualitative** data into **Quantitative** insights.



Calculations

- Score Totals
- Across Row Analysis



Aggregation

- Trends
- Averages
- Min / Max



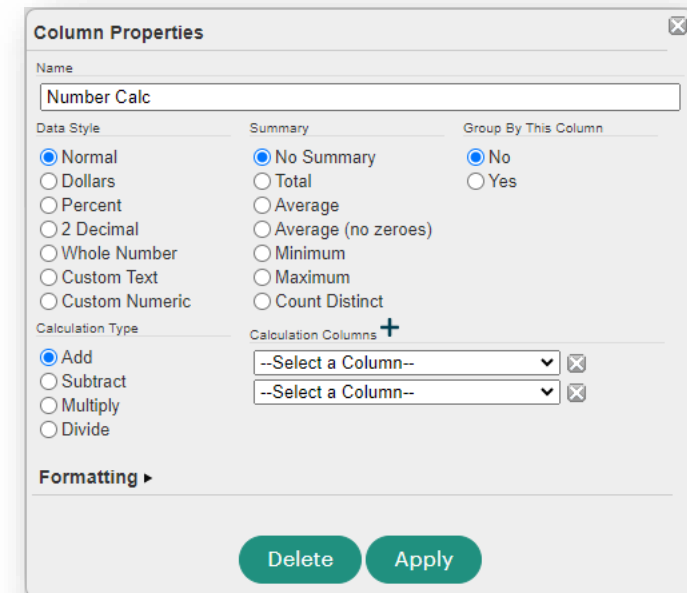
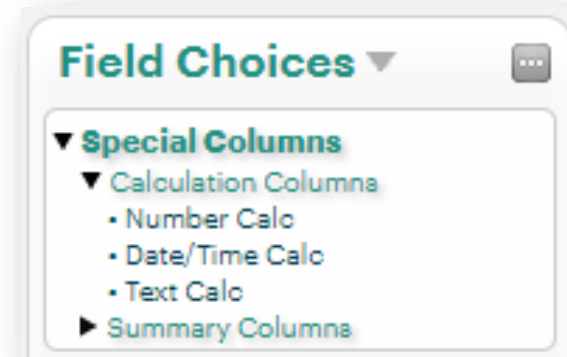
Comparison

- Pre & Post
- Progress / Change Over Time

Calculations

Calculation Columns

- Recommended for Surveys & Assessments where you can't include a Calculation Field in the form (externally shared).
- Opportunity for further analysis, but calculations may require several columns, one per operation (+ - x ÷).
- Apricot Column Summaries can also provide some calculation (Average, Minimum / Maximum).
- For more advanced formulas, consider Results Reporting.



Calculating Total Score

Step 1: Start with data from Tier 1.

- Recommend Record ID with identifier field(s).

Step 2: Pull in data from Survey or Assessment Tier 2.

- One column for each weighted field to add in the total.
- Must update Column Properties to show Stored Value.
- Can hide individual columns if you only want total.

2

Column Properties

Name
I often spend more time trying to think of...

Data Style

- Display Value
- Stored Value
- Custom Text
- Custom Numeric

Summary

Data Style changed -- Click here to refresh

- No Summary
- Count Distinct

Group By This Column

- No
- Yes

Formatting

Sort

- None
- Ascending
- Descending

Hidden

- No
- Yes

Width [reset]

Display Limit None [reset]

Alignment

- Left
- Center
- Right

Font Style

- Normal
- Bold
- Italicized

Color [reset]

Form Info

Delete Apply

Calculating Total Score

Step 3: Add a Calculation column.

- Configure to total up each individual field.
- Can only reference numeric or masked fields.

Column Properties

Name: Total Score

Data Style: Normal

Summary: No Summary

Group By This Column: No

Calculation Type: Add

Calculation Columns:

- I often spend more time trying to th
- Asking for help on the job is a sign
- I think it's okay to take off time from
- I usually try to avoid doing job task:
- I have held a couple of jobs for less

Buttons: Delete, Apply

Aggregation

Aggregate Analysis

- Calculation Columns apply across a single row, one record or one Participant's data per.
- Column Summaries apply down a column with records from multiple Participants.
- Can apply Grouping at Participant level to analyze one person's multiple records.

Data Style	Summary
<input checked="" type="radio"/> Normal	<input checked="" type="radio"/> No Summary
<input type="radio"/> Dollars	<input type="radio"/> Total
<input type="radio"/> Percent	<input type="radio"/> Average
<input type="radio"/> 2 Decimal	<input type="radio"/> Average (no zeroes)
<input type="radio"/> Whole Number	<input type="radio"/> Minimum
<input type="radio"/> Custom Text	<input type="radio"/> Maximum
<input type="radio"/> Custom Numeric	<input type="radio"/> Count Distinct

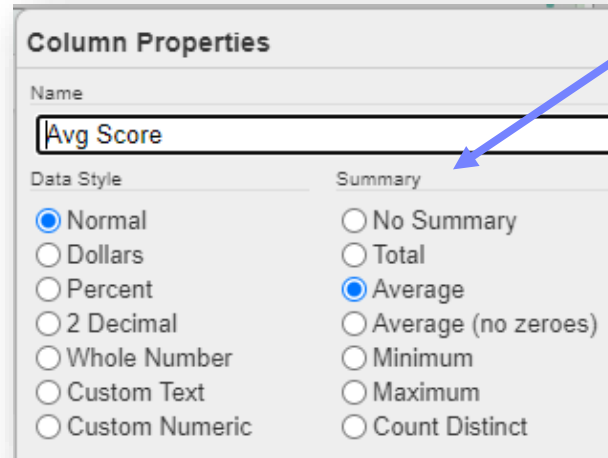
Aggregate Analysis

Step 1: Start with data from Tier 1.

- Recommend Record ID with identifier field(s).

Step 2: Pull in data from Survey or Assessment Tier 2.

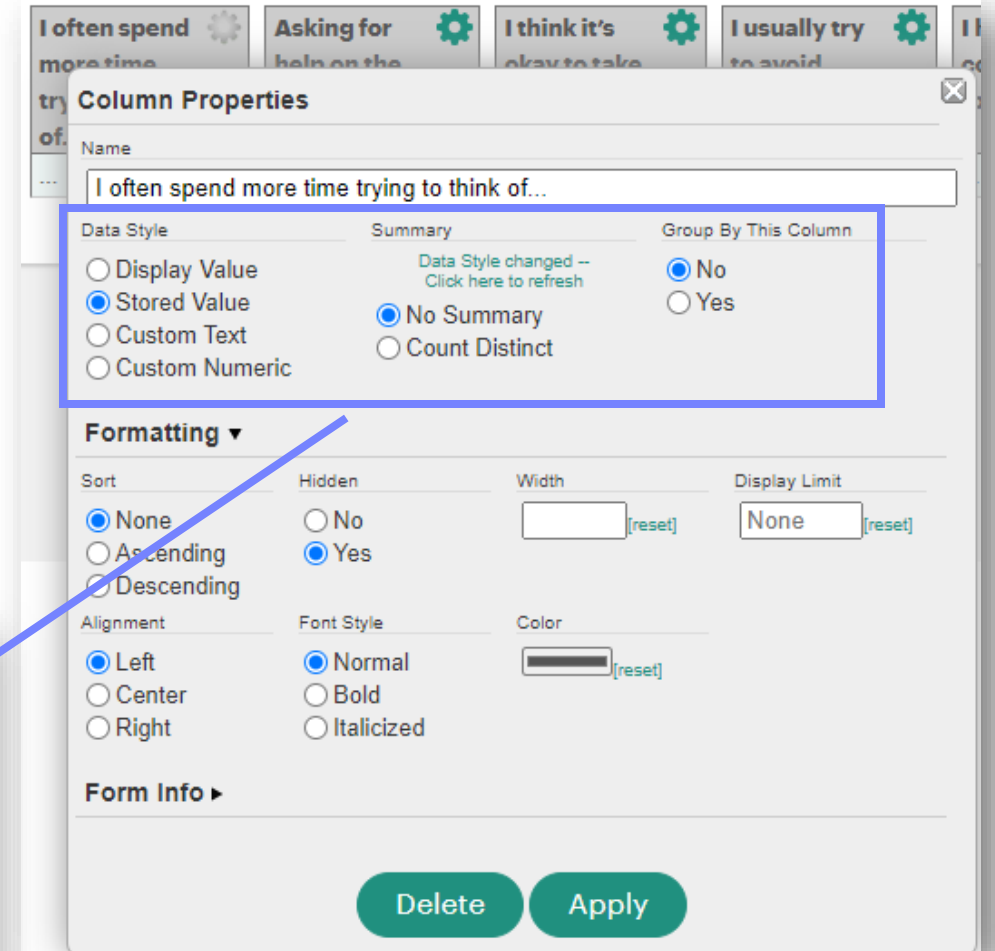
- Must update Column Properties to show Stored Value.
- Refresh Summary Options for numeric analysis.



Column Properties

Name: Avg Score

Data Style	Summary
<input checked="" type="radio"/> Normal	<input type="radio"/> No Summary
<input type="radio"/> Dollars	<input type="radio"/> Total
<input type="radio"/> Percent	<input checked="" type="radio"/> Average
<input type="radio"/> 2 Decimal	<input type="radio"/> Average (no zeroes)
<input type="radio"/> Whole Number	<input type="radio"/> Minimum
<input type="radio"/> Custom Text	<input type="radio"/> Maximum
<input type="radio"/> Custom Numeric	<input type="radio"/> Count Distinct



Column Properties

Name: I often spend more time trying to think of...

Data Style	Summary	Group By This Column
<input type="radio"/> Display Value	Data Style changed -- Click here to refresh	<input checked="" type="radio"/> No
<input checked="" type="radio"/> Stored Value	<input checked="" type="radio"/> No Summary	<input type="radio"/> Yes
<input type="radio"/> Custom Text	<input type="radio"/> Count Distinct	
<input type="radio"/> Custom Numeric		

Formatting

Sort: <input checked="" type="radio"/> None, <input type="radio"/> Ascending, <input type="radio"/> Descending	Hidden: <input type="radio"/> No, <input checked="" type="radio"/> Yes	Width: [reset]	Display Limit: None [reset]
Alignment: <input checked="" type="radio"/> Left, <input type="radio"/> Center, <input type="radio"/> Right	Font Style: <input checked="" type="radio"/> Normal, <input type="radio"/> Bold, <input type="radio"/> Italicized	Color: [reset]	

Form Info

Buttons: Delete, Apply

Aggregate Analysis

Optional:

Step 3: Apply Grouping.

Step 4: Change Section Properties to Totals.

Section Properties

Section Name
Aggregate Scores

Display Style

- Hidden
- Graph Only
- Totals
- Rows
- Vertical

Totals Only ▾

▼ Forms
Participant Profile
Soft Skills Assessment

▼ Filters +

▼ Limit Sections

Report last run September 16th 2024, 4:59 pm
[Click to refresh data](#)

	Maximum Highest Score	Minimum Lowest Score	Average Avg Score	Row Count
Alonzo LaBarca (790)	8	5	6.5	2
Alonzo LaBatsille (456)	4		2	2
Andrew Jones (448)	7	2	4.5	2
April Billingslea (34)	13	-4	4.5	2
Ashton Carter (623)	3	1	2	2
Austin Hill (463)	4		2	2

Comparison

Comparison Reporting

- Opportunity to compare multiple submissions of the same form.
- Ideal for looking at Survey & Assessment Scores by Participant.
- Consolidates data into one row per Participant for side-by-side review.
- Add Calculation to show change over time / improvement.

Participant ▼	Date [Pre] ▼	Total Score [Pre] ▼	Date [Post] ▼	Total Score [Post] ▼	Change Over Time ▼
Alonzo LaBarca (790)	02/09/2024	5	06/09/2024	8	3
Alonzo LaBatsille (456)	01/15/2024	0	05/15/2024	4	4
Andrew Jones (448)	01/09/2024	2	05/09/2024	7	5
April Billingslea (34)	01/02/2024	-4	05/02/2024	13	17
Ashton Carter (623)	01/22/2024	1	05/22/2024	3	2
Austin Hill (463)	01/20/2024	0	05/20/2024	4	4
Beth Crane (37)	01/04/2024	9	05/04/2024	13	4
Carlos Alegre (1006)	02/11/2024	3	06/11/2024	2	-1
Deandre Reynolds (685)	01/30/2024	-1	05/30/2024	14	15

Comparison Reporting

Step 1: Start with data from Tier 1.

- Recommend Record ID with identifier field(s).
- Allows Apricot to consolidate rows by person.

Step 2: Add data from Tier 2 Survey or Assessment.

- Include Score or weighted value field(s).
- Pull in same field multiple times to compare.

1

Column Properties
Name
Record ID
Data Style
 Normal
 With Identifier Field(s)
 Custom Text
 Custom Numeric

2

Record ID	Total Score	Total Score
...

Comparison Reporting

Step 3: Click on Tier 2 Form title to configure comparison.

- Choose “First Created” under Limits.
- Then add Aliases for each submission.
- For example: Pre / Post or 30 / 60 / 90 Day

Soft Skills Assessment Form Properties [highlight]

Connected To: 'Participant Profile' Using Field: 'Record ID'

Required:

- Always
- Sometimes
- Never

Participant Profile records will only be included if they have at least one Soft Skills Assessment record

Enforce Programs filter (where applicable)

Enforce User Level Access filter (where applicable)

Aliases +

Name	Limit
Pre	<input type="radio"/> Last Created <input type="radio"/> Next Created <input type="radio"/> Previous Created <input checked="" type="radio"/> First Created
Post	<input checked="" type="radio"/> Last Created <input type="radio"/> Next Created <input type="radio"/> Previous Created <input type="radio"/> First Created

Buttons: Delete, Apply

Comparison Reporting

Step 4: Update Column Properties for each Score field.

- Expand Form Info to choose Alias.
- Apply one Alias per repeated column.

The screenshot shows the 'Column Properties' dialog box for the 'Total Score [Pre]' column. The 'Form Info' dropdown is expanded, showing the following options:

Form	Section	Field
Soft Skills Assessment	Assessment	Total Score
Soft Skills Assessment [Pre]		
Soft Skills Assessment [Post]		

Comparison Reporting

Step 5: Add Calculation columns to analyze.

- One Calculation column per operation (+ - x ÷).
- Indicate which fields to use in the calculation.

Examples:

- Subtract [Pre] from [Post] for **Change Over Time**
- Days Between [Pre] and [Post] Assessment Dates for **Timeframe of Change**

The screenshot shows the 'Column Properties' dialog box for a column named 'Change Over Time'. The dialog is divided into several sections:

- Name:** 'Change Over Time'
- Data Style:** Radio buttons for Normal (selected), Dollars, Percent, 2 Decimal, Whole Number, Custom Text, and Custom Numeric.
- Summary:** Radio buttons for No Summary (selected), Total, Average, Average (no zeroes), Minimum, Maximum, and Count Distinct.
- Group By This Column:** Radio buttons for No (selected) and Yes.
- Calculation Type:** Radio buttons for Add, Subtract (selected), Multiply, and Divide. A blue bracket highlights this section.
- Calculation Columns:** A list of two columns: 'Total Score [Post]' and 'Total Score [Pre]'. Each entry has a dropdown arrow and a delete 'X' button. A blue box highlights this section.
- Formatting:** A collapsed section indicated by a right-pointing triangle.

At the bottom of the dialog are two buttons: 'Delete' and 'Apply'.

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)

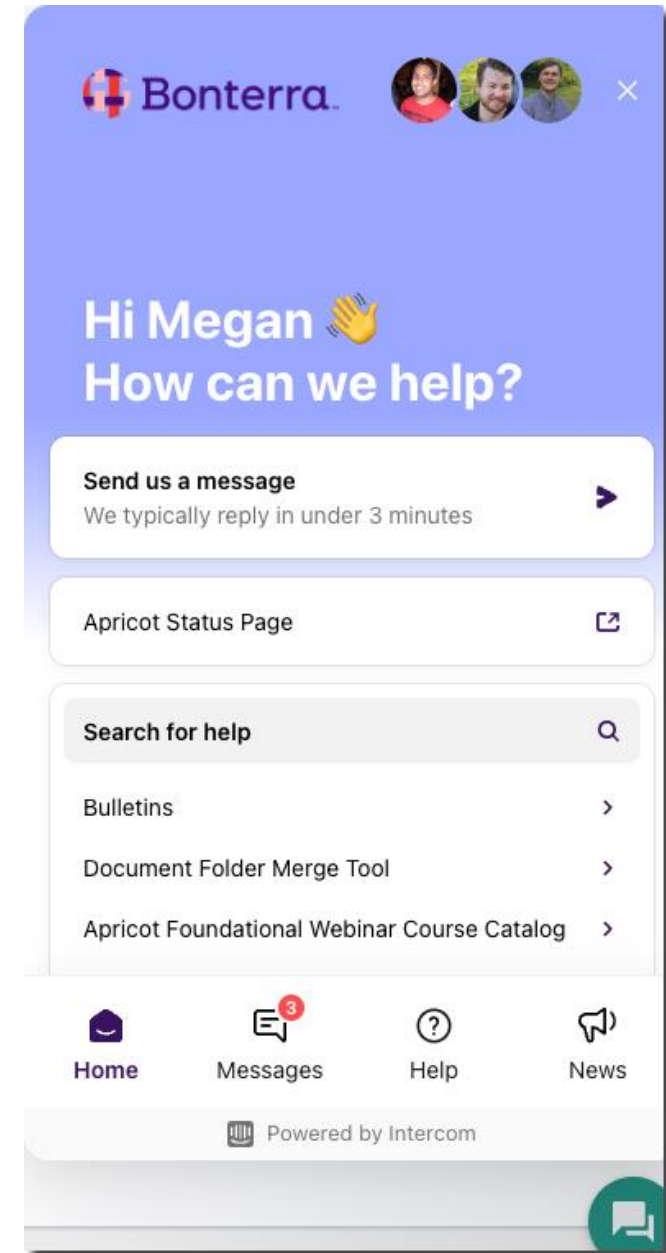


Build confidence & knowledge in
our software!

Customer Support

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.