

Adding Filters to Aliases

Apricot Targeted Webinar

Meet Your Trainer

Megan Dodds

Sr. Training Specialist

Clienttrainingrequests@bonterratech.com



Learning Objective

This training will cover:

- Adding Filters
- Example Use Cases

By the end of this session, the goal is for you to understand how to effectively use filters within aliases to manipulate report results.

Agenda

What is a Filter?

Adding Filters to Aliases

Adding Filters

What is a Filter?

- Adds another layer of criteria onto your results
- Allows you to specify date ranges to pull results from

The screenshot displays a software interface for configuring filters. At the top, a dark teal header contains the text "Happiness Assessment (Aliases - Happiness Assessment)" with a dropdown arrow and "Limit Section" with a gear icon. Below the header, a sidebar on the left lists "Forms" (Participant (Always), Happiness Assessment (Always)) and "Filters" (with a "--New Filter--" button). A "Limit Section" dropdown is also visible. A "Filter Properties" dialog box is open in the center, showing a "Rule" section with a checked "Select a Filter" option and a "Columns" list including "Participant", "Happiness Assessment - Record ID", "Happiness Assessment - Pre/Post Assessment", and "Date of Assessment" (which is highlighted in blue). Below the columns are "Searchable Fields" like "Legal Name First" and "Legal Name Middle". In the background, a table shows columns for "Pre/Post Assessment" and "Date of Assessment", each with a gear icon. A red circle with the number "1" and a plus sign is positioned in the top right of the main content area, and a red circle with the number "2" is positioned over the "Limit Section" dropdown in the sidebar.

Adding a Filter to an Alias

As you add in aliases, you should see limit sections appearing at the top of your report. You can navigate to the alias that you would like to apply the filter to by selecting “Show”

The screenshot displays a user interface for 'Aliases - Happiness Assessment'. The interface is organized into sections: 'Forms', 'Filters', and 'Limit Sections'. Under 'Limit Sections', three entries are listed, each with a 'Show' button. The first entry, 'Happiness Assessment (Aliases - Happiness Assessment) [First Created]', is highlighted with a red rectangular box. The other two entries are 'Happiness Assessment (Aliases - Happiness Assessment) [Mid Assessment]' and 'Happiness Assessment (Aliases - Happiness Assessment) [Post Assessment]'. A green gear icon is visible in the top right corner of the header area.

Adding a Filter to an Alias

You can apply the filter directly to the alias within the Limit Section

1. Select the plus (+) sign to the right of the Filters row
2. Identify the filter you would like to add in
3. Configure that filter

Happiness Assessment (Aliases - First Created Happiness Assessment) ▾ Limit Section ⚙

▼ Forms

Participant (Always)

Happiness Assessment (Always)

▼ Filters

--New Filter--

▼ Limit Section

1 +

Filter Properties [X]

Rule

✓ --Select a Filter--

Columns

Participant

Happiness Assessment - Record ID

Happiness Assessment - Pre/Post Assessment

Date of Assessment

Searchable Fields

Legal Name First

Legal Name Middle

Legal Name Last

Participant (grouped)

Date of Assessment

Adding a Filter to an Alias

Depending on the rule selected, your options will differ.

- Is
- Is After
- Is Empty or After
- Is Before
- Is Empty or Before
- Is Between
- Is Empty
- Today
- This Week
- This Month
- ✓ This Year
- Within the Last
- Within the Next

Filter Properties

Rule

Date of Assessment

This Year

* indicates fields that are already included in this section

Options

Inverse

Locked

Hidden

Global

Comparison

Delete Apply

Publish and Run!

Once your filters have been applied, publish and run your report to ensure everything looks good!

Aliases - Happiness Assessment ▾

▼ Forms

Participant
* Happiness Assessment

▼ Filters +

▼ Limit Sections

Happiness Assessment (Aliases - First Created Happiness Assessment) [First Created] Hide

Date of Assessment This Year

Happiness Assessment (Aliases - Happiness Assessment) [Mid Assessment] Hide

Happiness Assessment (Aliases - Happiness Assessment) [Post Assessment] Hide

Report last run June 3rd 2024, 10:14 am
[Click to refresh data](#)

Search Q Displaying 8 of 8 Rows (Expand All Cells)

Name ▾	Date of Assessment ▾	Total Happiness Score ▾	Total Happiness Score [Mid Assessment] ▾	Total Happiness Score [Post Assessment] ▾	Creation Date ▾
Leo Dodds (2544)	03/13/2024	20	20	15	03/13/2024 9:38 AM
Maisy Zurcher (2545)	03/14/2024	20	18	20	03/14/2024 9:14 AM
Molly Walker (2564)	03/14/2024	20	20	20	03/14/2024 9:13 AM
Henry Smith (2571)	03/14/2024	4	8	14	03/14/2024 9:13 AM

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)

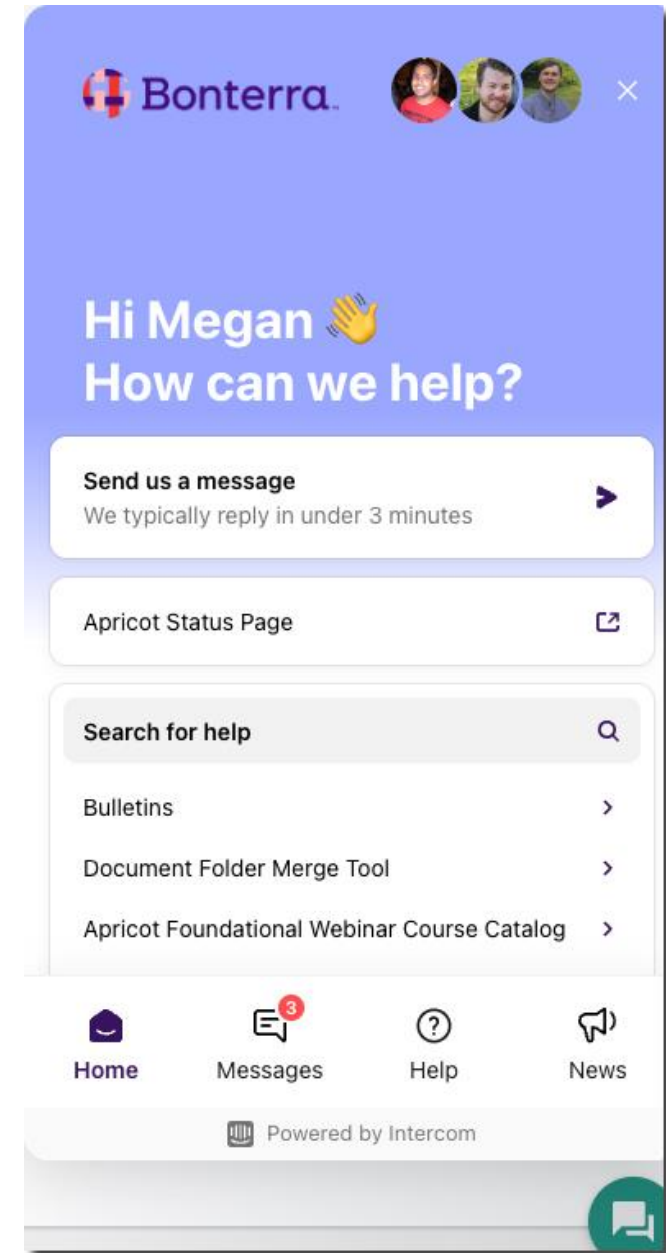


Build confidence & knowledge in
our software!

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.