Results Webinar Advanced Query Filters

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Meet Your Trainer

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Learning Objective

Help Report Writers understand best practices for using the query filter in results so that users feel confident when narrowing data sets within Results reports.

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Agenda

Filtering Overview

Consolidate Prompts

Filter Logic

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Filtering Overview

When to Use Query Filters:

- This can be considered the first layer of filtering the data; narrows which data from the selected universe will be returned in the report

- The less data the report generates, the faster it will generate

- Additional filters can be applied within the report if needed using Report Filters and/or Input Controls

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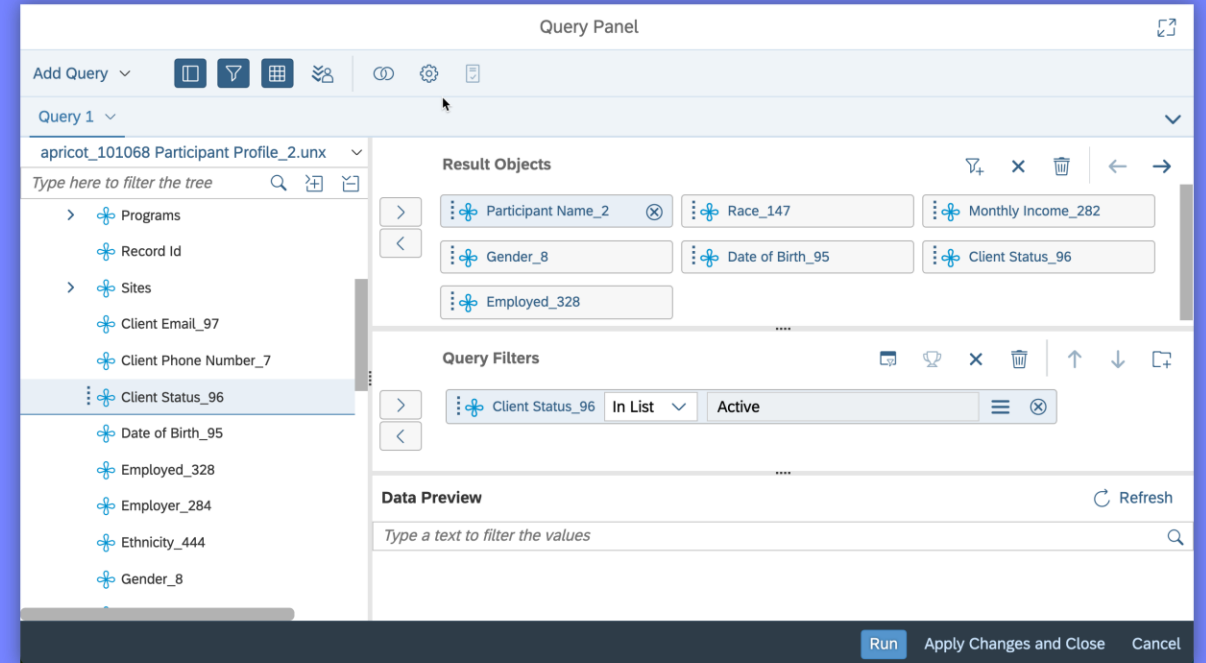
Steps for Setting Up Query Filters

1. Determine which Data Element(s) to filter by
2. Select Filter Functions (Equal To, In List, Between, etc)
3. Select Filter Type (Constant, Values from list, Prompt)
   - Configure Prompt Properties if applicable
     - Consolidate Prompts using Prompt Text if applicable

Filter Logic options that are less commonly used, but are important to know:
- Set Filter Relationships (And/Or)
- Nesting

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Step 1: Select Which Data to Filter By

- Drag and drop data element or select and click the right arrow to move into Query Filters box

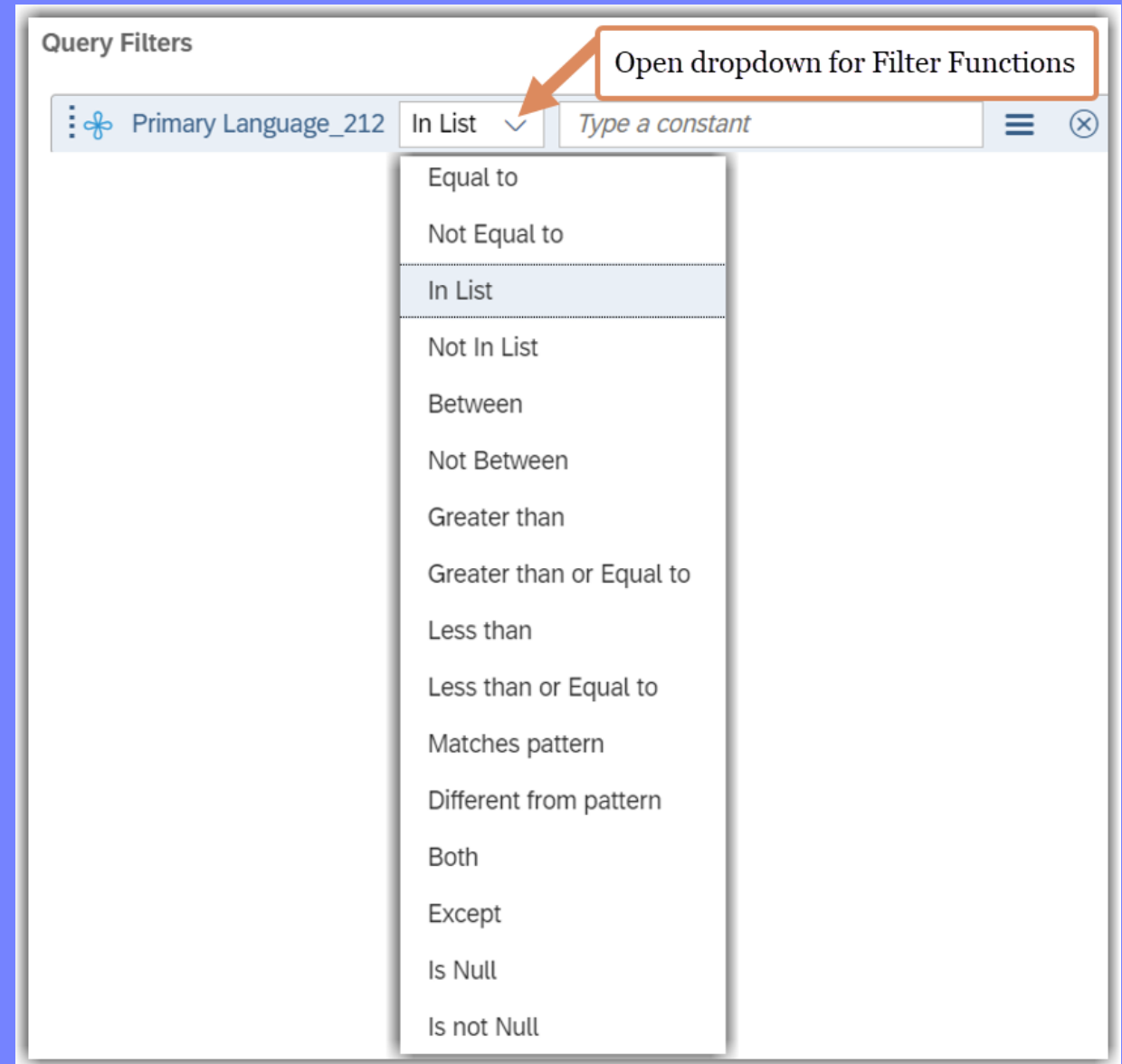- If needed, multiple fields can be included in the Query Filters
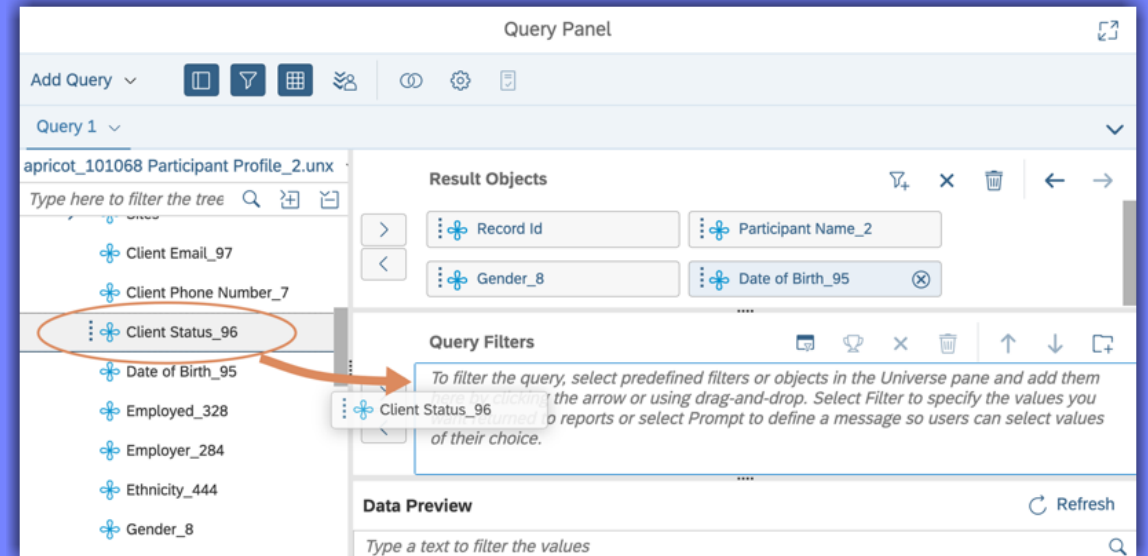
Step 2: Filter Function

Click to open the dropdown following the field name

Popular functions include:

- Equal to
- In List
- Between
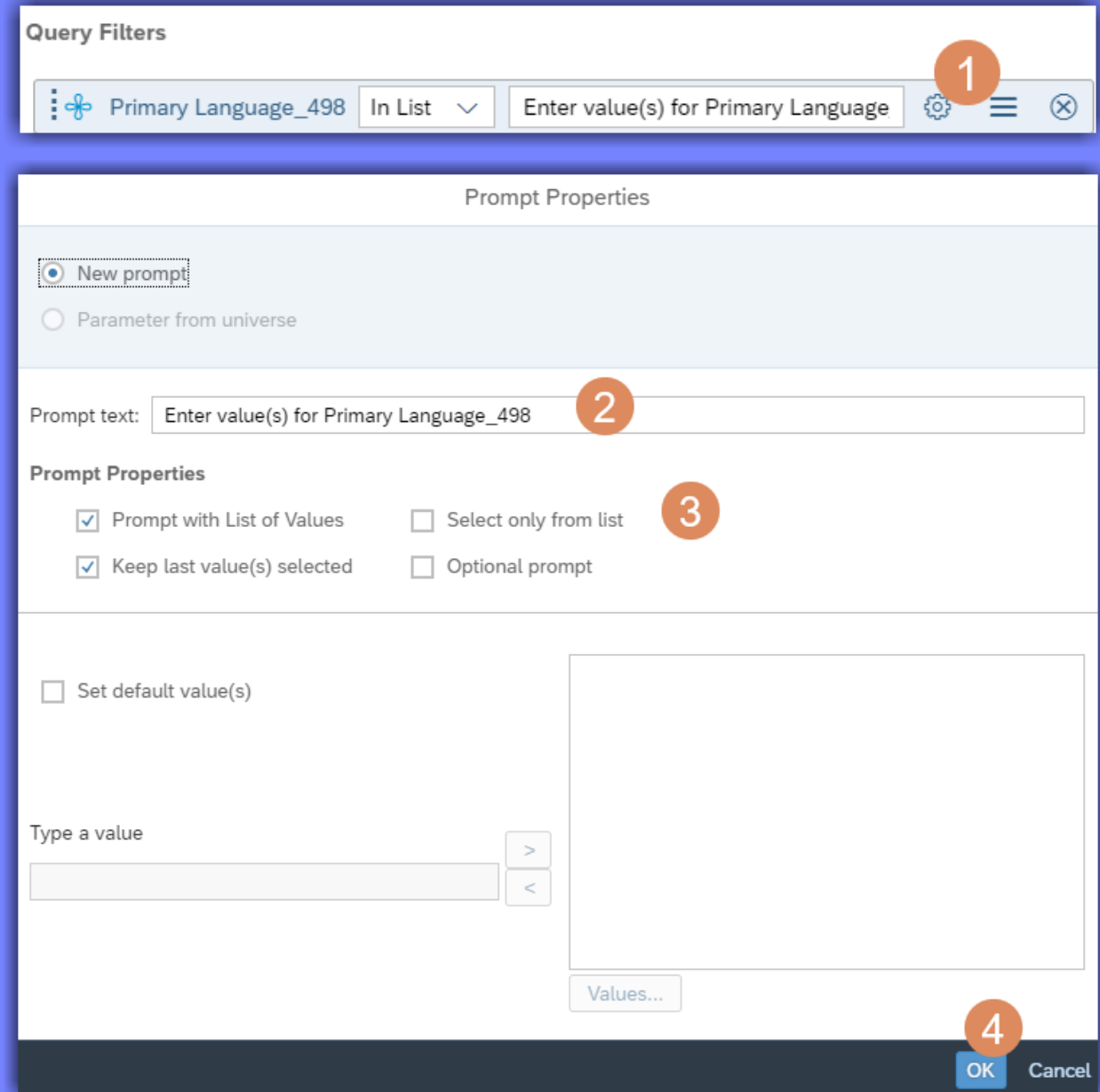- Great than
- Less than

Step 3: Filter Type

- Constant will be based on what the Report Builder selects
- Value(s) from list allows the report builder to select criteria from a list of options
- Prompt unlocks the filter, meaning any user running the report will set the values for that
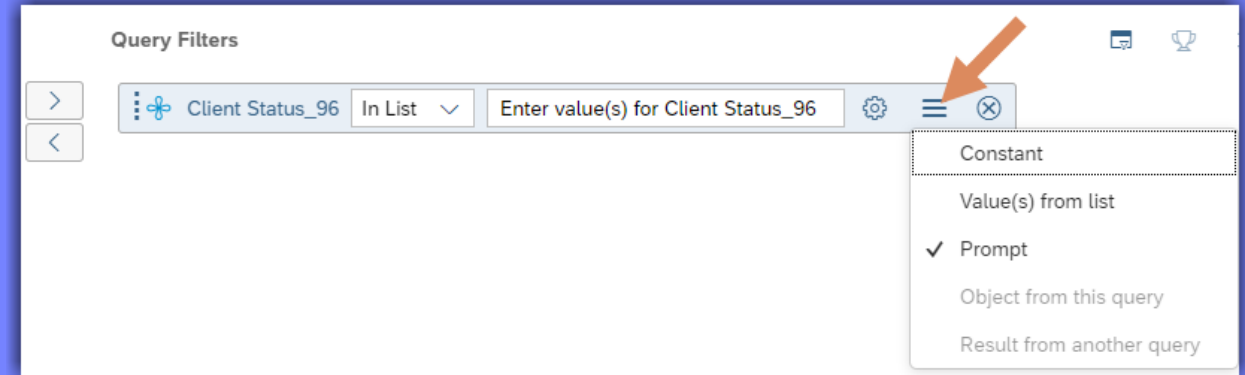
Prompt Properties

Adjust how users will experience prompts

1. Click the gear icon to access options, including:
    - Update prompt text
    - Prompt with list of values, Make prompt optional, Keep last values selected, etc

2. Click OK to save changes made to prompt properties

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Best Practice

Keep in mind:

Uncheck Prompt with List of Values when filtering for dates.

Otherwise, users will need to scroll through all available date values and select a date from that list.

Consolidate Prompts

Consolidate Prompts

Make running reports faster and easier!

Ask yourself if the same values should apply to multiple filters. If yes:

- Adjust prompt text so that it matches

- Test to make sure it works as intended

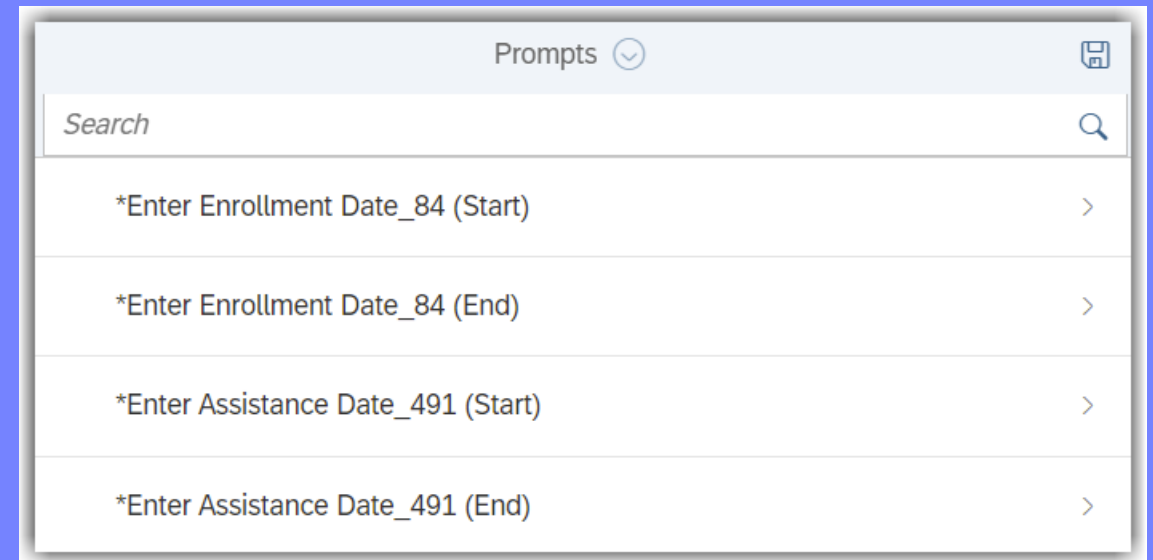- This consolidation will reduce the number of prompts a user needs to complete to run the report

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Consolidate Prompts

After:

Filter Logic
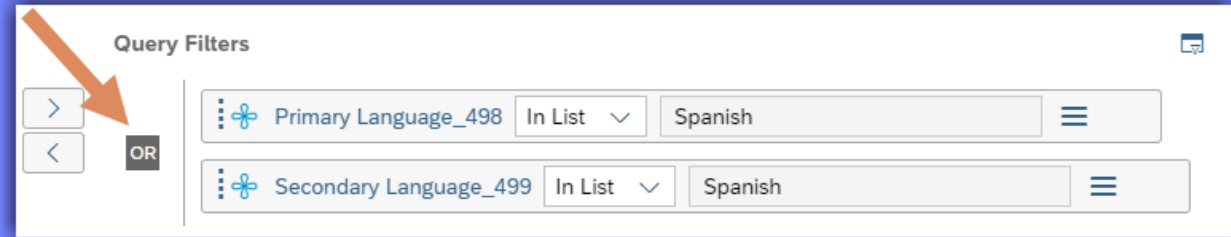
Filter Logic

AND/OR

How do the Query Filters relate to one another?

AND – records must match all Query Filters

OR – records must match one or more Query Filters

Click AND and it becomes OR

Click OR and it returns to AND

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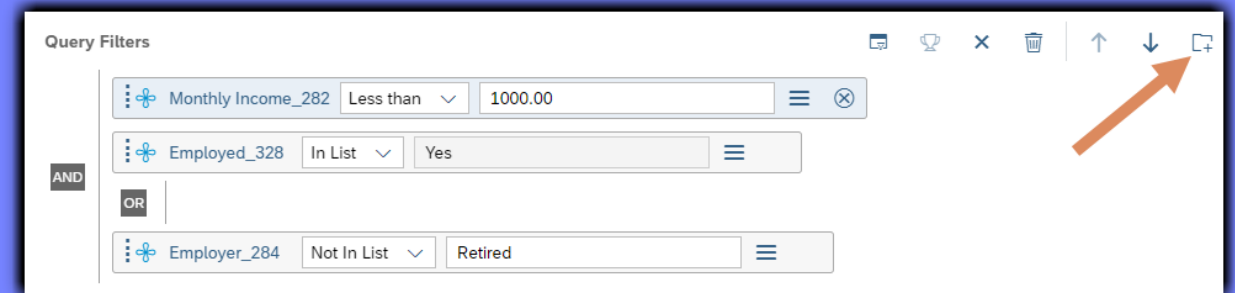# Filter Logic

Add Nested Filter

How do the Query Filters relate to one another?

- Nesting filters can be thought of like adding parenthesis in math

- Inside logic is performed first, followed by Outside logic

In this example, Participants must be Employed OR they have a value for Employer that is not Retired. AND they must have a Monthly Income < $1000

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Additional Resources

Additional Training Opportunities

- Knowledge Base Articles – Search in Chat

- On-demand Videos in our [Bonterra Academy](#)

- Free Webinars & Recordings

- Foundations - Intensive Multiday Trainings that Cover the Basics

- Labs - 2 hr Live Trainings on Specific Topics and Capabilities

Build confidence and knowledge in our software.

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Training Survey

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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

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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!

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Thank you for attending!

We hope to see you
in future trainings.

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