# Apricot Analyzing Your Data with Report Filters



#### Meet Your Trainer

Jaime Ransom

Training & Development Associate



#### Learning Objective

Review filter functionality within the Report Builder so that Administrators can make informed decisions when designing reports.



## Agenda

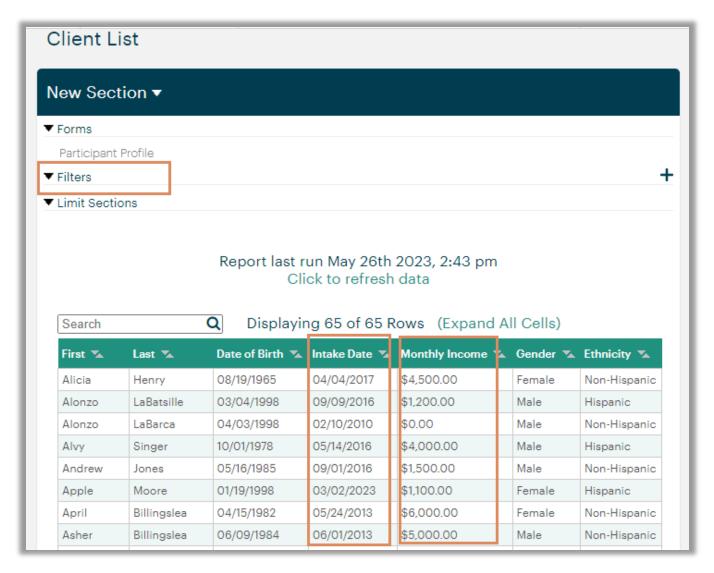
Purpose of Filters Adding Filters Filter Options Filter Logic



## Purpose of Filters

#### Purpose of Filters

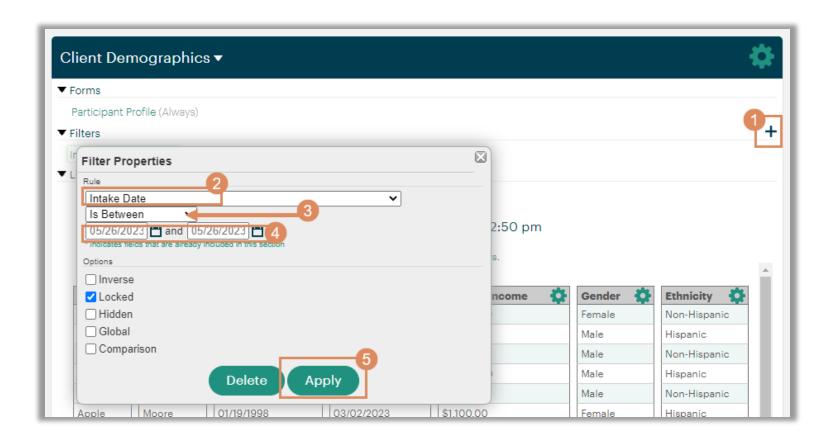
- All data by default
- Filters narrow scope
- Example:
- To see new clients making under \$2k/month; need to add a filter





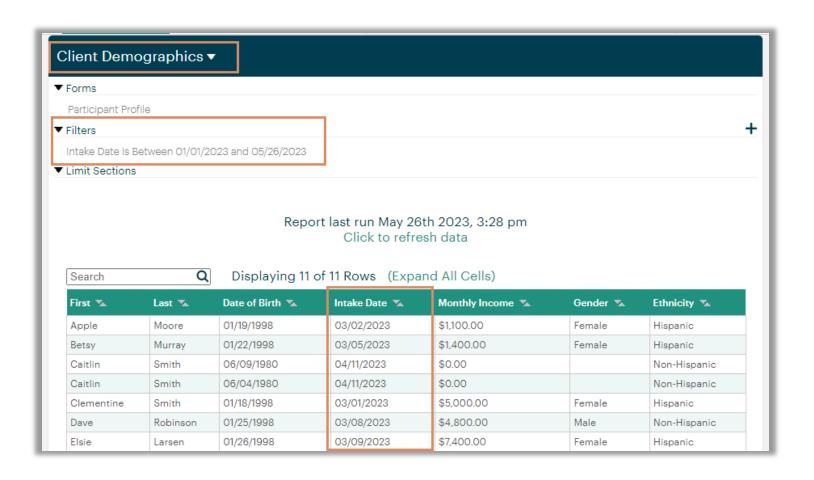
#### Steps:

- 1. Click the + to the right of filters
- 2. Select data point to filter by
- 3. Select desired operator
- 4. Set filter parameters
- 5. Click Apply to save



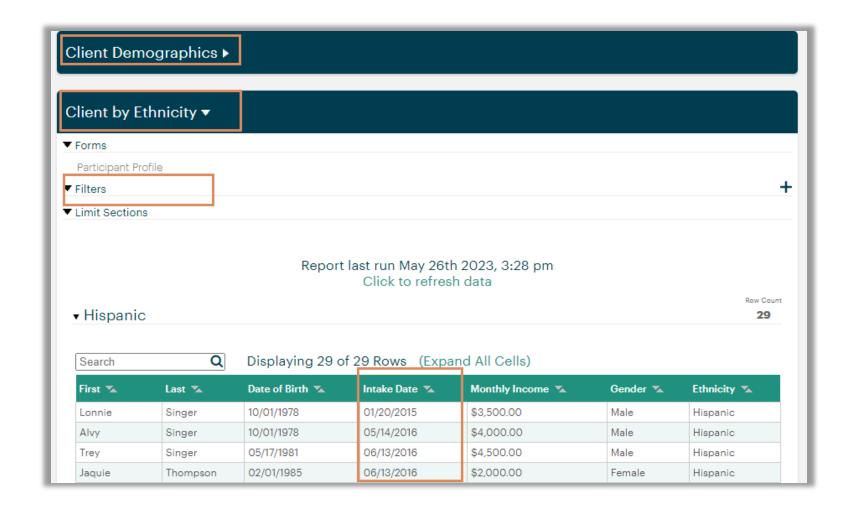


Only apply to section it's in



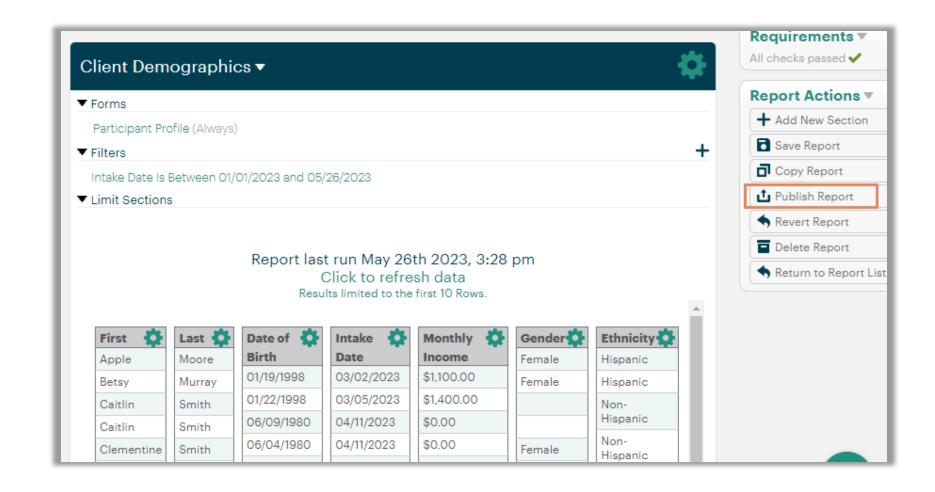


- Only apply to section it's in
- Must be added to each section
- Save time using Global values\*



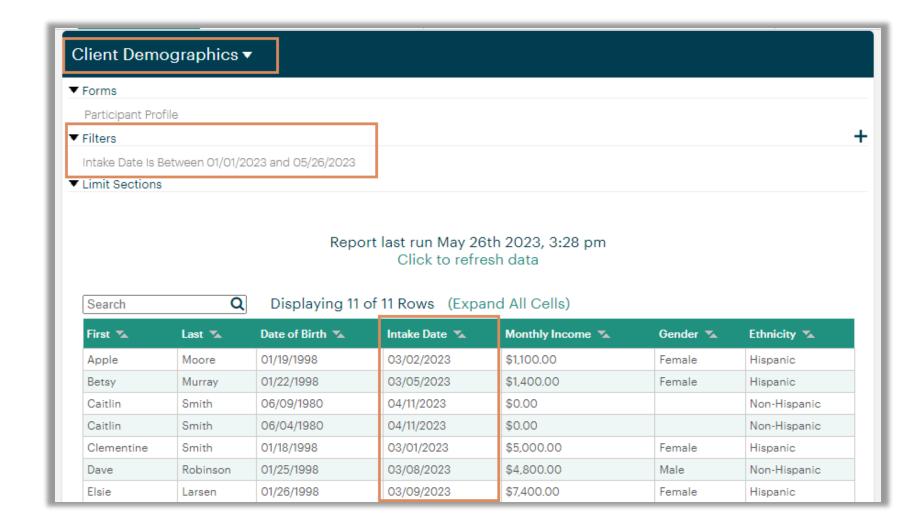


Publish to save



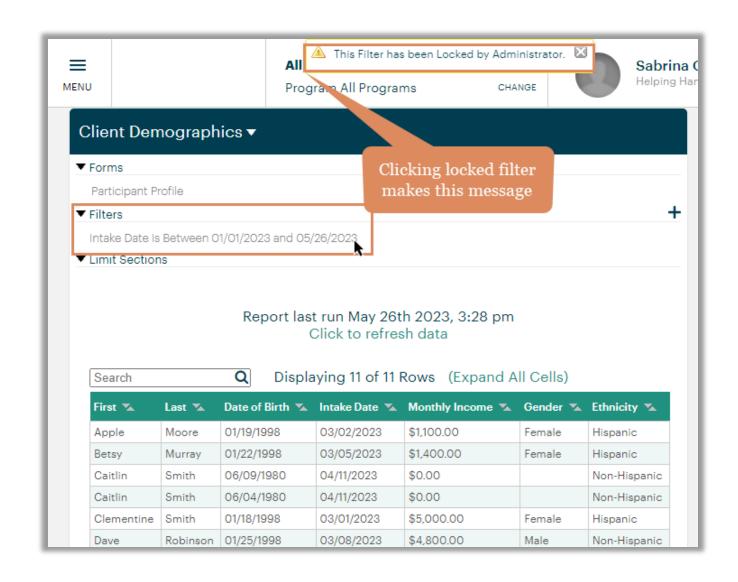


- Publish to save
- Run report to test





- Publish to save
- Run report to test
- Locked by Default

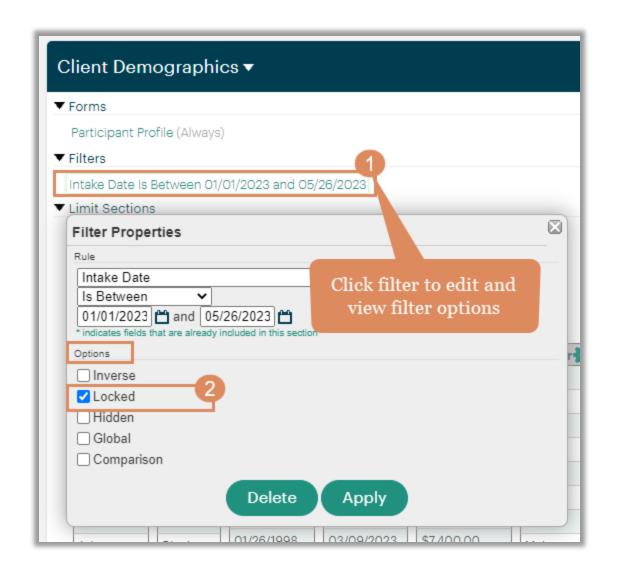




## Filter Options

#### Filter Options - Locked

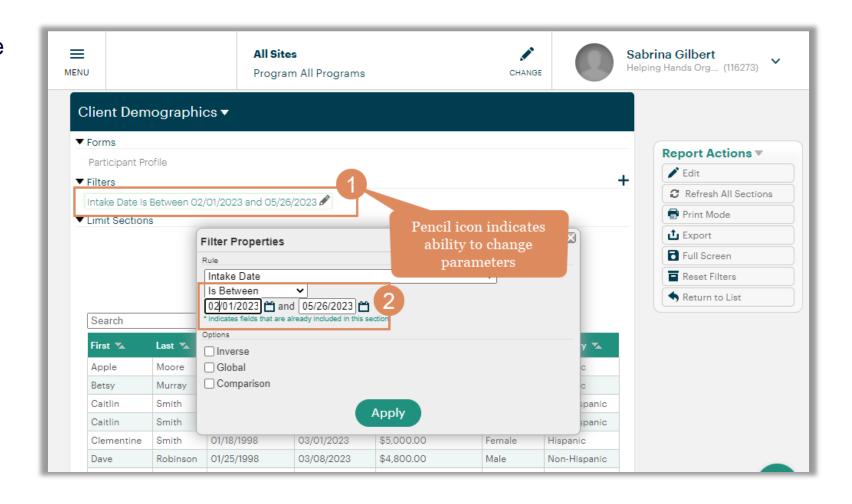
- Click Filter to edit
- Check box turns on option
- Unchecked box turns option off





#### Filter Options - Locked

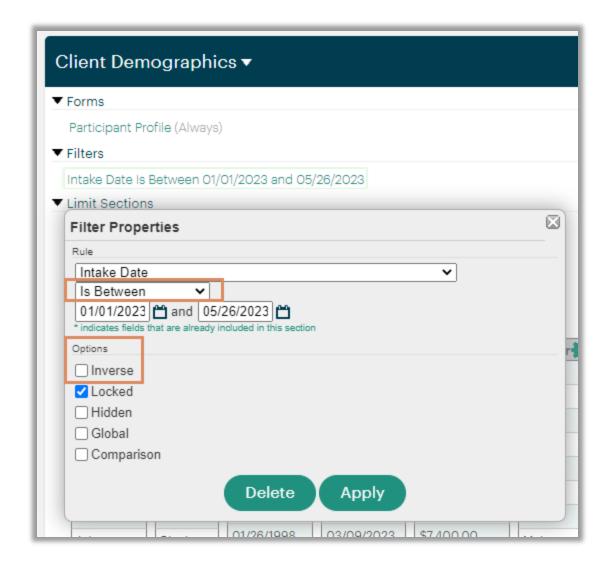
- Unlocked filter is called Run Time filter.
- Can change parameters when running the report





#### Filter Options – Inverse

Does opposite of selected Operator



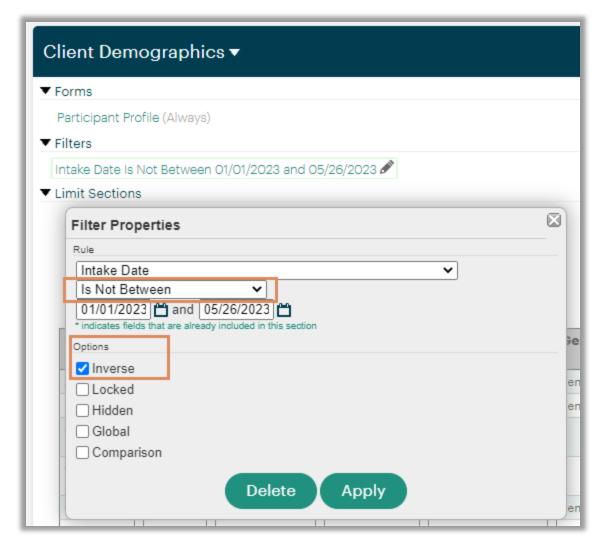


#### Filter Options – Inverse

Does opposite of selected Operator

Example: Checking Inverse for "Is

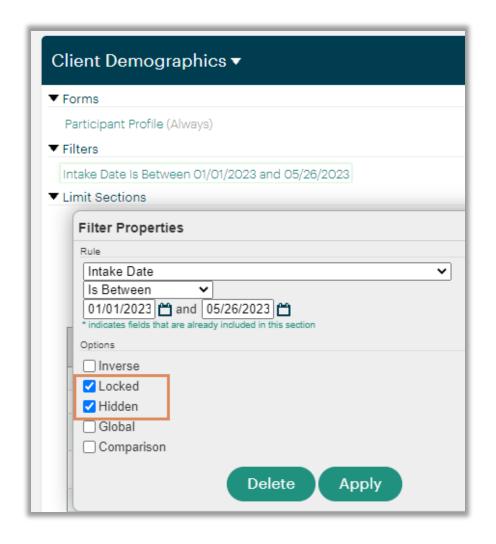
Between" creates "Is **NOT** between"





#### Filter Options – Hidden

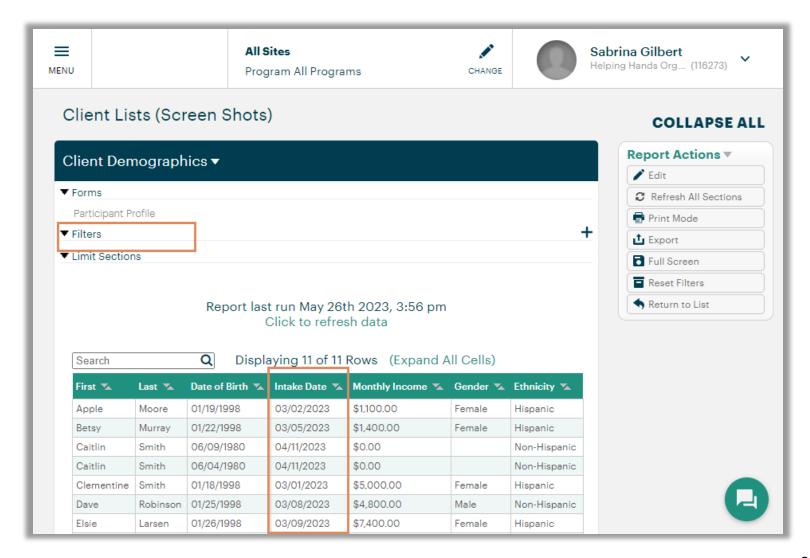
Automatically Locks filter





#### Filter Options – Hidden

- Automatically Locks filter
- Hides from view at run time



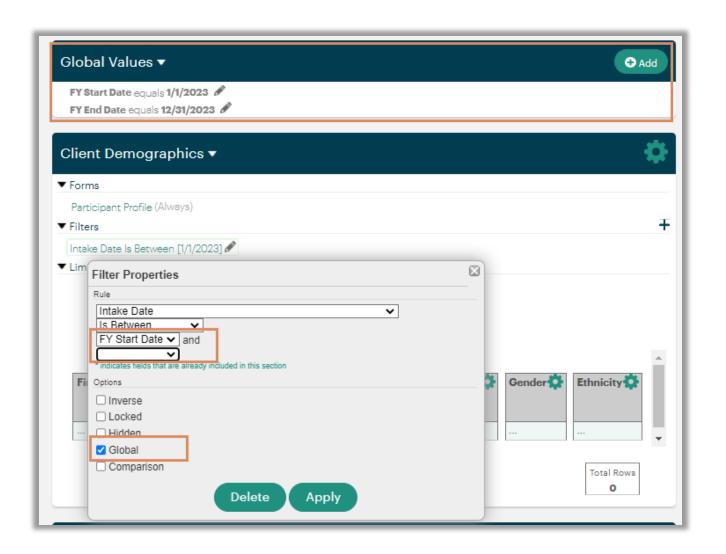


#### Filter Options – Global

Reference Global Values

Saves Time

Eliminates error

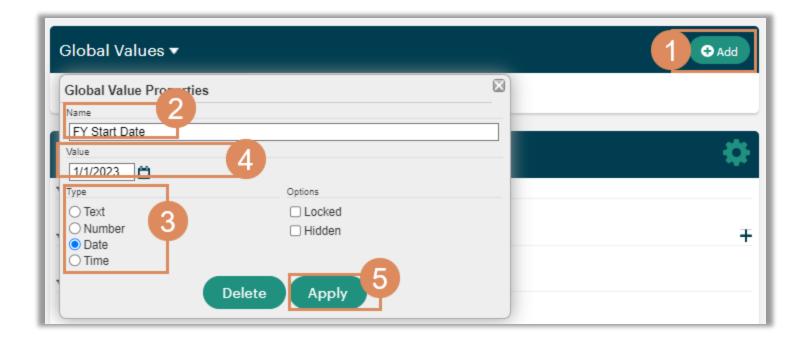




## Filter Options – Global

#### Steps:

1. Create Global Values

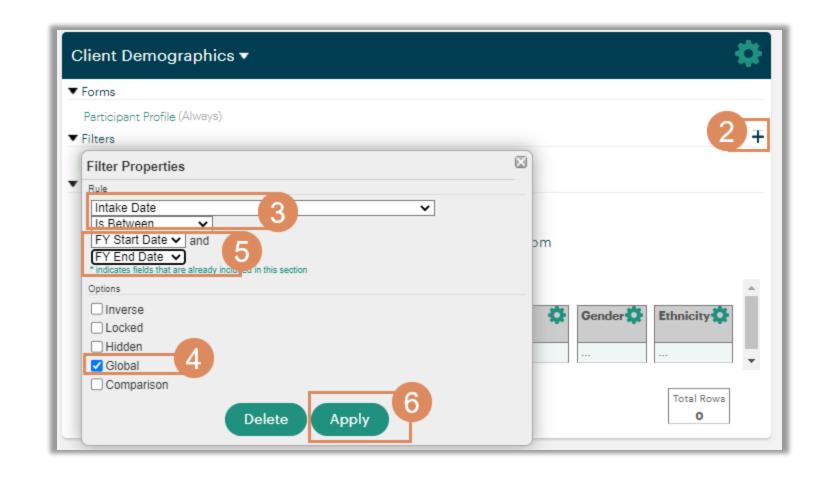




#### Filter Options – Global

#### Steps:

- 1. Create Global Values
- 2. Add Filter
- 3. Select Operator
- 4. Check Global Option
- 5. Select Global Values
- 6. Apply
- 7. Repeat steps in each section

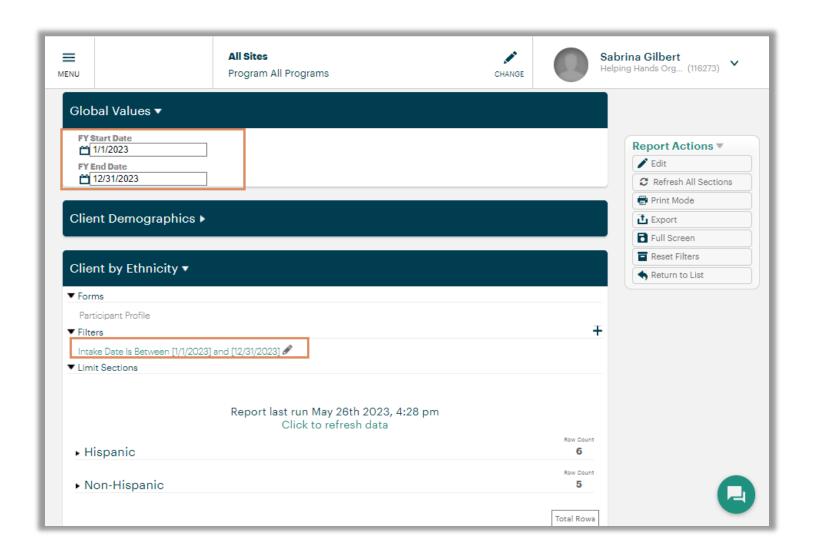




#### Filter Options - Global

Publish and Run

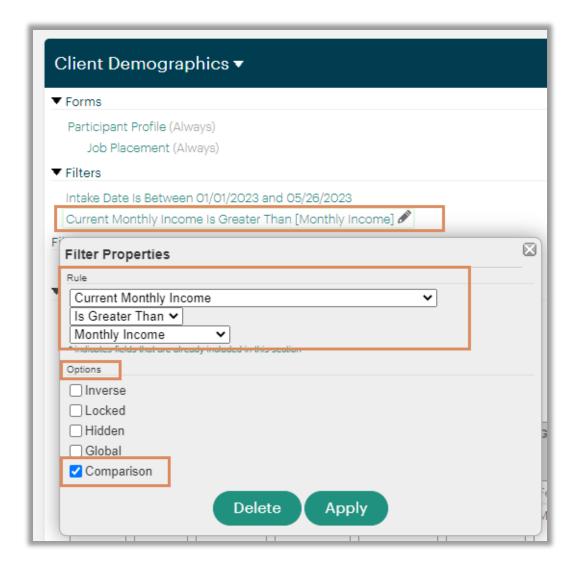
Changes in Global Value apply to all sections





### Filter Options - Comparison

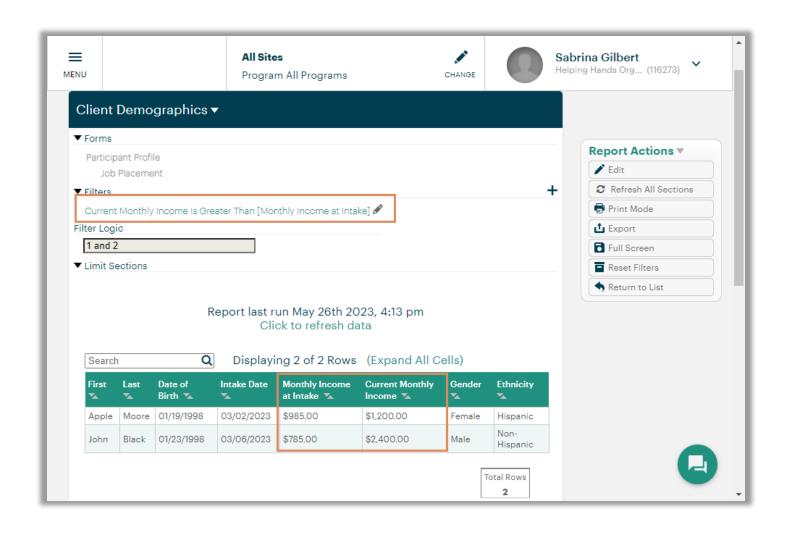
Compare data across two report columns





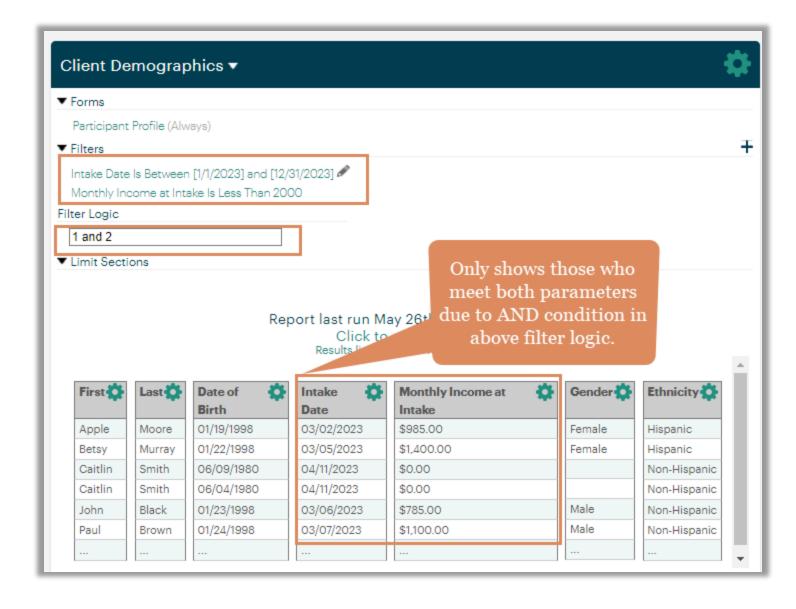
#### Filter Options - Comparison

- Compare data across two report columns
- Removes records that don't meet criteria



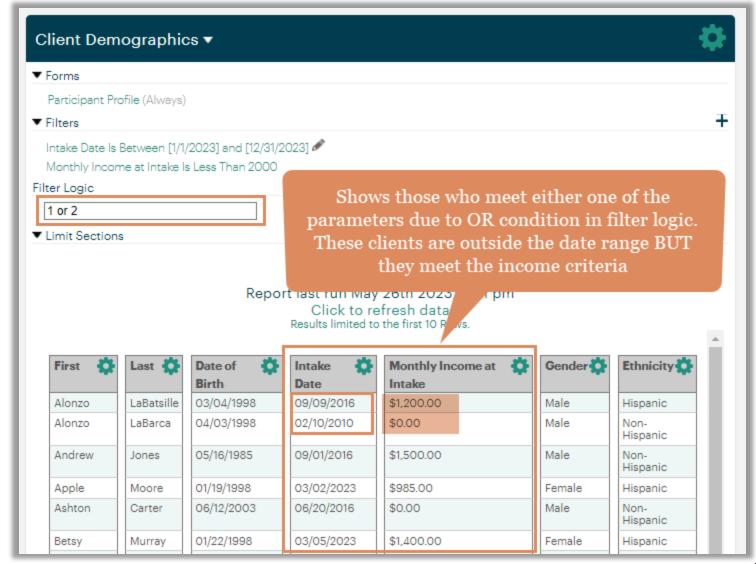


- When 2 or more filters
- AND condition by default





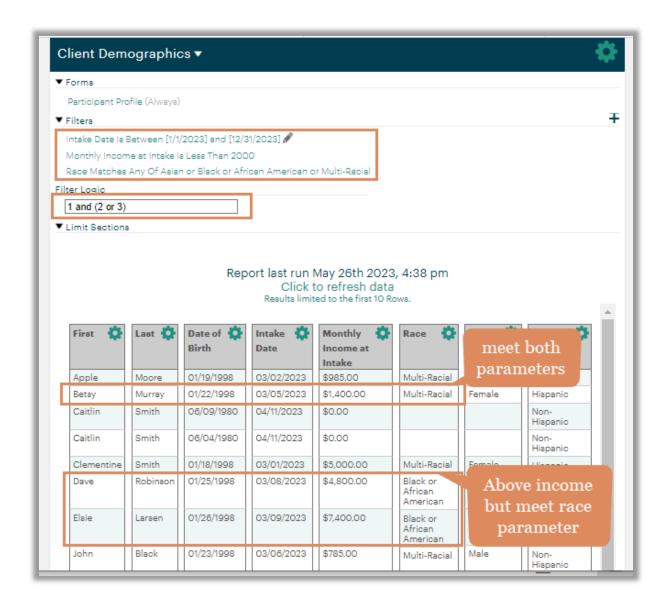
- When 2 or more filters
- AND condition by default
- Can change to OR





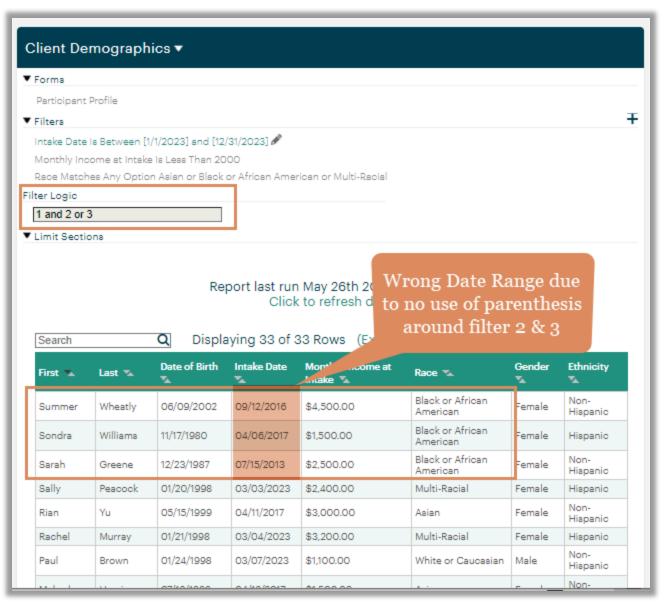
Allows Flexibility

Example: See clients who started in 2023 and are either BIPOC or make under \$2K





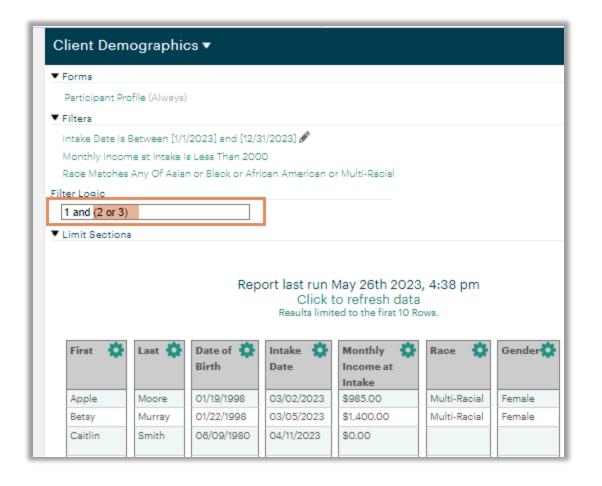
No parenthesis by default which can make data inaccurate





No parenthesis by default which can make data inaccurate

Add context by using parenthesis

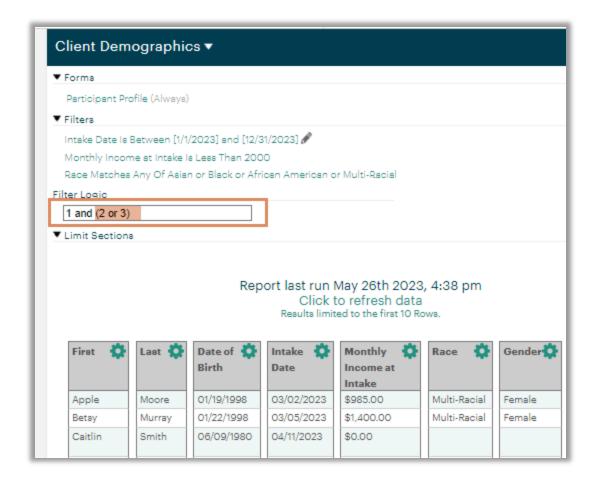




No parenthesis by default which can make data inaccurate

Add context by using parenthesis

Parenthesis informs software which filters the conditions apply to





## Additional Resources



#### Additional Training Opportunities

- Knowledge Base How-To Articles (Search Chat or Visit Online)
- Bonterra Academy Free Webinars & Recordings
- <u>Foundations</u> 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: <a href="mailto:apricot@bonterratech.com">apricot@bonterratech.com</a>

## 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.

