

Apricot Analyzing Your Data with Report Filters

Meet Your Trainer

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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

Client List

New Section ▾

▼ Forms

Participant Profile

▼ Filters

▼ Limit Sections

Report last run May 26th 2023, 2:43 pm
[Click to refresh data](#)

Search Displaying 65 of 65 Rows (Expand All Cells)

First ▾	Last ▾	Date of Birth ▾	Intake Date ▾	Monthly Income ▾	Gender ▾	Ethnicity ▾
Alicia	Henry	08/19/1965	04/04/2017	\$4,500.00	Female	Non-Hispanic
Alonzo	LaBatsille	03/04/1998	09/09/2016	\$1,200.00	Male	Hispanic
Alonzo	LaBarca	04/03/1998	02/10/2010	\$0.00	Male	Non-Hispanic
Alvy	Singer	10/01/1978	05/14/2016	\$4,000.00	Male	Hispanic
Andrew	Jones	05/16/1985	09/01/2016	\$1,500.00	Male	Non-Hispanic
Apple	Moore	01/19/1998	03/02/2023	\$1,100.00	Female	Hispanic
April	Billingslea	04/15/1982	05/24/2013	\$6,000.00	Female	Non-Hispanic
Asher	Billingslea	06/09/1984	06/01/2013	\$5,000.00	Male	Non-Hispanic

Adding Filters

Adding Filters

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

Client Demographics

Forms

Participant Profile (Always)

Filters

Filter Properties

Rule

Intake Date

Is Between

05/26/2023 and 05/26/2023

Options

Inverse

Locked

Hidden

Global

Comparison

Delete Apply

Income	Gender	Ethnicity
	Female	Non-Hispanic
	Male	Hispanic
	Male	Non-Hispanic
	Male	Hispanic
	Male	Non-Hispanic
	Female	Hispanic

Adding Filters

- Only apply to section it's in

Client Demographics ▾

▼ Forms

Participant Profile

▼ Filters

Intake Date Is Between 01/01/2023 and 05/26/2023

▼ Limit Sections

Report last run May 26th 2023, 3:28 pm
[Click to refresh data](#)

Search Displaying 11 of 11 Rows (Expand All Cells)

First ▾	Last ▾	Date of Birth ▾	Intake Date ▾	Monthly Income ▾	Gender ▾	Ethnicity ▾
Apple	Moore	01/19/1998	03/02/2023	\$1,100.00	Female	Hispanic
Betsy	Murray	01/22/1998	03/05/2023	\$1,400.00	Female	Hispanic
Caitlin	Smith	06/09/1980	04/11/2023	\$0.00		Non-Hispanic
Caitlin	Smith	06/04/1980	04/11/2023	\$0.00		Non-Hispanic
Clementine	Smith	01/18/1998	03/01/2023	\$5,000.00	Female	Hispanic
Dave	Robinson	01/25/1998	03/08/2023	\$4,800.00	Male	Non-Hispanic
Elsie	Larsen	01/26/1998	03/09/2023	\$7,400.00	Female	Hispanic

Adding Filters

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

The screenshot displays a software interface for managing client data. At the top, there are two dark blue navigation bars: 'Client Demographics' and 'Client by Ethnicity'. Below these, a 'Forms' section is expanded to show 'Participant Profile' and 'Filters'. The 'Filters' option is highlighted with an orange box. Below the forms, there is a 'Limit Sections' section. A central message states 'Report last run May 26th 2023, 3:28 pm' with a 'Click to refresh data' link. On the right, a 'Row Count' of 29 is shown. Below this, a search bar and the text 'Displaying 29 of 29 Rows (Expand All Cells)' are visible. A table with 7 columns is shown below: First, Last, Date of Birth, Intake Date, Monthly Income, Gender, and Ethnicity. The 'Intake Date' column is highlighted with an orange box. The table contains four rows of data.

First	Last	Date of Birth	Intake Date	Monthly Income	Gender	Ethnicity
Lonnie	Singer	10/01/1978	01/20/2015	\$3,500.00	Male	Hispanic
Alvy	Singer	10/01/1978	05/14/2016	\$4,000.00	Male	Hispanic
Trey	Singer	05/17/1981	06/13/2016	\$4,500.00	Male	Hispanic
Jaquie	Thompson	02/01/1985	06/13/2016	\$2,000.00	Female	Hispanic

Adding Filters

- Publish to save

Client Demographics

▼ Forms

Participant Profile (Always)

▼ Filters

Intake Date is Between 01/01/2023 and 05/26/2023

▼ Limit Sections

Report last run May 26th 2023, 3:28 pm
Click to refresh data
Results limited to the first 10 Rows.

First	Last	Date of Birth	Intake Date	Monthly Income	Gender	Ethnicity
Apple	Moore				Female	Hispanic
Betsy	Murray	01/19/1998	03/02/2023	\$1,100.00	Female	Hispanic
Caitlin	Smith	01/22/1998	03/05/2023	\$1,400.00		Non-Hispanic
Caitlin	Smith	06/09/1980	04/11/2023	\$0.00		
Clementine	Smith	06/04/1980	04/11/2023	\$0.00	Female	Non-Hispanic

Requirements ▼
All checks passed

Report Actions ▼

- + Add New Section
- Save Report
- Copy Report
- Publish Report
- Revert Report
- Delete Report
- Return to Report List

Adding Filters

- Publish to save
- Run report to test

Client Demographics ▼

▼ Forms

Participant Profile

▼ Filters

Intake Date Is Between 01/01/2023 and 05/26/2023

▼ Limit Sections

Report last run May 26th 2023, 3:28 pm
Click to refresh data

Search Displaying 11 of 11 Rows (Expand All Cells)

First ▼	Last ▼	Date of Birth ▼	Intake Date ▼	Monthly Income ▼	Gender ▼	Ethnicity ▼
Apple	Moore	01/19/1998	03/02/2023	\$1,100.00	Female	Hispanic
Betsy	Murray	01/22/1998	03/05/2023	\$1,400.00	Female	Hispanic
Caitlin	Smith	06/09/1980	04/11/2023	\$0.00		Non-Hispanic
Caitlin	Smith	06/04/1980	04/11/2023	\$0.00		Non-Hispanic
Clementine	Smith	01/18/1998	03/01/2023	\$5,000.00	Female	Hispanic
Dave	Robinson	01/25/1998	03/08/2023	\$4,800.00	Male	Non-Hispanic
Elsie	Larsen	01/26/1998	03/09/2023	\$7,400.00	Female	Hispanic

Adding Filters

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

Client Demographics

Forms

Participant Profile

Filters

Intake Date Is Between 01/01/2023 and 05/26/2023

Limit Sections

Report last run May 26th 2023, 3:28 pm
Click to refresh data

Search Displaying 11 of 11 Rows (Expand All Cells)

First	Last	Date of Birth	Intake Date	Monthly Income	Gender	Ethnicity
Apple	Moore	01/19/1998	03/02/2023	\$1,100.00	Female	Hispanic
Betsy	Murray	01/22/1998	03/05/2023	\$1,400.00	Female	Hispanic
Caitlin	Smith	06/09/1980	04/11/2023	\$0.00		Non-Hispanic
Caitlin	Smith	06/04/1980	04/11/2023	\$0.00		Non-Hispanic
Clementine	Smith	01/18/1998	03/01/2023	\$5,000.00	Female	Hispanic
Dave	Robinson	01/25/1998	03/08/2023	\$4,800.00	Male	Non-Hispanic

Filter Options

Filter Options - Locked

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

Client Demographics ▾

▼ Forms

Participant Profile (Always)

▼ Filters

Intake Date Is Between 01/01/2023 and 05/26/2023

▼ Limit Sections

Filter Properties

Rule

Intake Date

Is Between ▾

01/01/2023 and 05/26/2023

* indicates fields that are already included in this section

Options

Inverse

Locked

Hidden

Global

Comparison

Delete Apply

Filter Options - Locked

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

The screenshot displays a software interface for a report. At the top, there is a navigation bar with a 'MENU' icon, 'All Sites' and 'Program All Programs' text, a 'CHANGE' button with a pencil icon, and a user profile for 'Sabrina Gilbert' (Helping Hands Org... (116273)).

The main content area is titled 'Client Demographics' and contains several sections: 'Forms' (with 'Participant Profile'), 'Filters', and 'Limit Sections'. The 'Filters' section is highlighted with a red box and a circled '1'. It contains a filter rule: 'Intake Date Is Between 02/01/2023 and 05/26/2023'. A pencil icon next to the filter text indicates that the filter parameters can be changed at runtime.

A 'Filter Properties' dialog box is open over the filter rule, showing the following details:

- Rule: Intake Date
- Operator: Is Between
- Values: 02/01/2023 and 05/26/2023
- Options: Inverse, Global, Comparison
- Buttons: Apply

A circled '2' points to the date fields in the dialog. A callout box with an orange background and white text says: 'Pencil icon indicates ability to change parameters'.

On the right side of the interface, there is a 'Report Actions' panel with the following options: Edit, Refresh All Sections, Print Mode, Export, Full Screen, Reset Filters, and Return to List.

At the bottom of the interface, a table displays client data:

First	Last					
Apple	Moore					
Betsy	Murray					
Caitlin	Smith					
Caitlin	Smith					
Clementine	Smith	01/18/1998	03/01/2023	\$5,000.00	Female	Hispanic
Dave	Robinson	01/25/1998	03/08/2023	\$4,800.00	Male	Non-Hispanic

Filter Options – Inverse

Does opposite of selected Operator

Client Demographics ▾

▼ Forms

Participant Profile (Always)

▼ Filters

Intake Date Is Between 01/01/2023 and 05/26/2023

▼ Limit Sections

Filter Properties [X]

Rule

Intake Date ▾

Is Between ▾

01/01/2023 [📅] and 05/26/2023 [📅]

* indicates fields that are already included in this section

Options

Inverse

Locked

Hidden

Global

Comparison

Delete Apply

Filter Options – Inverse

Does opposite of selected Operator

Example: Checking Inverse for “Is Between” creates “Is **NOT** between”

The screenshot displays a user interface for configuring filters. At the top, a dark teal header reads "Client Demographics" with a downward arrow. Below this, there are sections for "Forms" (containing "Participant Profile (Always)"), "Filters" (containing "Intake Date Is Not Between 01/01/2023 and 05/26/2023"), and "Limit Sections". A "Filter Properties" dialog box is open, showing the following configuration:

- Rule:** Intake Date (dropdown)
- Operator:** Is Not Between (dropdown, highlighted with an orange box)
- Values:** 01/01/2023 (calendar icon) and 05/26/2023 (calendar icon)
- Options:**
 - Inverse (highlighted with an orange box)
 - Locked
 - Hidden
 - Global
 - Comparison

At the bottom of the dialog are "Delete" and "Apply" buttons. A small note below the date fields states: "* indicates fields that are already included in this section".

Filter Options – Hidden

- Automatically Locks filter

Client Demographics ▾

▼ Forms

Participant Profile (Always)

▼ Filters

Intake Date Is Between 01/01/2023 and 05/26/2023

▼ Limit Sections

Filter Properties

Rule

Intake Date ▾

Is Between ▾

01/01/2023 📅 and 05/26/2023 📅

* indicates fields that are already included in this section

Options

Inverse

Locked

Hidden

Global

Comparison

Delete Apply

Filter Options – Hidden

- Automatically Locks filter
- Hides from view at run time

The screenshot shows a web application interface for 'Client Lists (Screen Shots)'. The top navigation bar includes a 'MENU' icon, 'All Sites' (Program All Programs), a 'CHANGE' button, and a user profile for 'Sabrina Gilbert' (Helping Hands Org... (116273)).

The main content area is titled 'Client Lists (Screen Shots)'. On the left, there is a sidebar for 'Client Demographics' with a dropdown menu. The 'Filters' option is highlighted with a red box. Other options in the sidebar include 'Forms' (with a sub-item 'Participant Profile') and 'Limit Sections'. A plus sign is visible to the right of the 'Filters' option.

Below the sidebar, the report title is 'Report last run May 26th 2023, 3:56 pm' with a 'Click to refresh data' link. A search bar is present above the table. The table displays 11 rows of data, with the 'Intake Date' column highlighted by a red box. The table columns are: First, Last, Date of Birth, Intake Date, Monthly Income, Gender, and Ethnicity.

On the right side, there is a 'COLLAPSE ALL' button and a 'Report Actions' panel with the following options: Edit, Refresh All Sections, Print Mode, Export, Full Screen, Reset Filters, and Return to List.

First	Last	Date of Birth	Intake Date	Monthly Income	Gender	Ethnicity
Apple	Moore	01/19/1998	03/02/2023	\$1,100.00	Female	Hispanic
Betsy	Murray	01/22/1998	03/05/2023	\$1,400.00	Female	Hispanic
Caitlin	Smith	06/09/1980	04/11/2023	\$0.00		Non-Hispanic
Caitlin	Smith	06/04/1980	04/11/2023	\$0.00		Non-Hispanic
Clementine	Smith	01/18/1998	03/01/2023	\$5,000.00	Female	Hispanic
Dave	Robinson	01/25/1998	03/08/2023	\$4,800.00	Male	Non-Hispanic
Elsie	Larsen	01/26/1998	03/09/2023	\$7,400.00	Female	Hispanic

Filter Options – Global

Reference Global Values

Saves Time

Eliminates error

The screenshot displays a software interface with a dark teal header. The top section is titled "Global Values" and contains two entries: "FY Start Date equals 1/1/2023" and "FY End Date equals 12/31/2023", both with edit icons. Below this is a "Client Demographics" section with a gear icon. Under "Forms", there is a "Participant Profile (Always)" entry. Under "Filters", there is an entry "Intake Date Is Between [1/1/2023]". A "Filter Properties" dialog box is open, showing a rule for "Intake Date" with the operator "Is Between". The "and" operator is selected, and "FY Start Date" is chosen from the dropdown menu. The "Global" checkbox is checked. The dialog box also includes options for "Inverse", "Locked", "Hidden", and "Comparison", along with "Delete" and "Apply" buttons. In the background, there are "Gender" and "Ethnicity" filter cards and a "Total Rows" indicator showing 0.

Filter Options – Global

Steps:

1. Create Global Values

The screenshot displays the 'Global Values' interface. At the top right, there is a dark teal header with the text 'Global Values' and a dropdown arrow, followed by a green 'Add' button with a plus icon, labeled with a circled '1'. Below this is a 'Global Value Properties' dialog box. The dialog box has a title bar with a close button. It contains several fields: 'Name' with the value 'FY Start Date' (labeled with a circled '2'), 'Value' with the value '1/1/2023' and a calendar icon (labeled with a circled '4'), and 'Type' with radio buttons for 'Text', 'Number', 'Date' (selected), and 'Time' (labeled with a circled '3'). To the right of the 'Type' section are 'Options' with checkboxes for 'Locked' and 'Hidden'. At the bottom of the dialog box are two green buttons: 'Delete' and 'Apply' (labeled with a circled '5'). The background shows a list of global values with a gear icon and a plus sign.

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

The screenshot displays the 'Client Demographics' interface. A 'Filter Properties' dialog box is open, showing the configuration for a filter. The 'Rule' section includes a dropdown for 'Intake Date' (3), the operator 'Is Between' (3), and two dropdowns for 'FY Start Date' and 'FY End Date' (5) connected by 'and'. The 'Options' section has 'Global' checked (4). The 'Apply' button is highlighted (6). In the background, a 'Forms' section shows 'Participant Profile (Always)' with a plus sign (2), and 'Gender' and 'Ethnicity' sections with gear icons. A 'Total Rows' box shows '0'.

Filter Options - Global

Publish and Run

Changes in Global Value apply to all sections

The screenshot displays a software interface with a top navigation bar. On the left is a 'MENU' icon. The center shows 'All Sites' and 'Program All Programs'. On the right is a 'CHANGE' icon and a user profile for 'Sabrina Gilbert' from 'Helping Hands Org...' (116273). Below the navigation bar, there are three main sections: 'Global Values', 'Client Demographics', and 'Client by Ethnicity'. The 'Global Values' section contains two date pickers: 'FY Start Date' set to '1/1/2023' and 'FY End Date' set to '12/31/2023', both highlighted with an orange border. The 'Client by Ethnicity' section has a 'Filters' subsection with a filter 'Intake Date Is Between [1/1/2023] and [12/31/2023]' also highlighted with an orange border. Below the filters, a message states 'Report last run May 26th 2023, 4:28 pm' with a 'Click to refresh data' link. A table shows two rows: 'Hispanic' with a row count of 6, and 'Non-Hispanic' with a row count of 5. A 'Total Rows' label is at the bottom right. On the far right, a 'Report Actions' panel includes buttons for 'Edit', 'Refresh All Sections', 'Print Mode', 'Export', 'Full Screen', 'Reset Filters', and 'Return to List'. A chat icon is located at the bottom right of the interface.

Filter Options - Comparison

- Compare data across two report columns

The screenshot displays a software interface for managing filters. At the top, a dark teal header reads "Client Demographics" with a downward arrow. Below this, a section titled "Forms" lists "Participant Profile (Always)" and "Job Placement (Always)". A section titled "Filters" shows a list of filters, with one highlighted in orange: "Current Monthly Income Is Greater Than [Monthly Income]".

An overlay window titled "Filter Properties" is open, showing the configuration for the selected filter. The "Rule" section contains three dropdown menus: "Current Monthly Income", "Is Greater Than", and "Monthly Income". Below this, the "Options" section has several checkboxes: "Inverse", "Locked", "Hidden", "Global", and "Comparison". The "Comparison" checkbox is checked and highlighted with an orange box. At the bottom of the dialog are "Delete" and "Apply" buttons.

Filter Options - Comparison

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

The screenshot displays a web application interface for a report. At the top, there is a navigation bar with a menu icon, the text 'All Sites Program All Programs', a 'CHANGE' button, and a user profile for 'Sabrina Gilbert' from 'Helping Hands Org...' (116273). Below the navigation bar, the main content area is titled 'Client Demographics'. It contains several sections: 'Forms' (Participant Profile, Job Placement), 'Filters' (Current Monthly Income Is Greater Than [Monthly Income at Intake]), 'Filter Logic' (1 and 2), and 'Limit Sections'. A message indicates the report was last run on May 26th 2023 at 4:13 pm, with a 'Click to refresh data' link. Below this, there is a search bar and a table displaying 2 rows of data. The table has columns for First, Last, Date of Birth, Intake Date, Monthly Income at Intake, Current Monthly Income, Gender, and Ethnicity. The 'Current Monthly Income' column is highlighted in orange. A 'Total Rows' box shows the number 2. On the right side, there is a 'Report Actions' panel with buttons for Edit, Refresh All Sections, Print Mode, Export, Full Screen, Reset Filters, and Return to List.

First	Last	Date of Birth	Intake Date	Monthly Income at Intake	Current Monthly Income	Gender	Ethnicity
Apple	Moore	01/19/1998	03/02/2023	\$985.00	\$1,200.00	Female	Hispanic
John	Black	01/23/1998	03/06/2023	\$785.00	\$2,400.00	Male	Non-Hispanic

Filter Logic

Filter Logic

- When 2 or more filters
- AND condition by default

Client Demographics [Settings]

▼ Forms
Participant Profile (Always)

▼ Filters
Intake Date Is Between [1/1/2023] and [12/31/2023] [Edit]
Monthly Income at Intake Is Less Than 2000

Filter Logic
1 and 2

▼ Limit Sections

Report last run May 26th
Click to Results

First	Last	Date of Birth	Intake Date	Monthly Income at Intake	Gender	Ethnicity
Apple	Moore	01/19/1998	03/02/2023	\$985.00	Female	Hispanic
Betsy	Murray	01/22/1998	03/05/2023	\$1,400.00	Female	Hispanic
Caitlin	Smith	06/09/1980	04/11/2023	\$0.00		Non-Hispanic
Caitlin	Smith	06/04/1980	04/11/2023	\$0.00		Non-Hispanic
John	Black	01/23/1998	03/06/2023	\$785.00	Male	Non-Hispanic
Paul	Brown	01/24/1998	03/07/2023	\$1,100.00	Male	Non-Hispanic
...

Only shows those who meet both parameters due to AND condition in above filter logic.

Filter Logic

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

Client Demographics ▼

▼ Forms
Participant Profile (Always)

▼ Filters
Intake Date Is Between [1/1/2023] and [12/31/2023] ✎
Monthly Income at Intake Is Less Than 2000

Filter Logic

▼ Limit Sections

Report last run May 26th 2023 11:01 pm
Click to refresh data
Results limited to the first 10 Rows.

First	Last	Date of Birth	Intake Date	Monthly Income at Intake	Gender	Ethnicity
Alonzo	LaBatsille	03/04/1998	09/09/2016	\$1,200.00	Male	Hispanic
Alonzo	LaBarca	04/03/1998	02/10/2010	\$0.00	Male	Non-Hispanic
Andrew	Jones	05/16/1985	09/01/2016	\$1,500.00	Male	Non-Hispanic
Apple	Moore	01/19/1998	03/02/2023	\$985.00	Female	Hispanic
Ashton	Carter	06/12/2003	06/20/2016	\$0.00	Male	Non-Hispanic
Betsy	Murray	01/22/1998	03/05/2023	\$1,400.00	Female	Hispanic

Shows those who meet either one of the parameters due to OR condition in filter logic. These clients are outside the date range BUT they meet the income criteria

Filter Logic

Allows Flexibility

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

Client Demographics

▼ Forms
Participant Profile (Always)

▼ Filters
Intake Date Is Between [1/1/2023] and [12/31/2023]
Monthly Income at Intake Is Less Than 2000
Race Matches Any Of Asian or Black or African American or Multi-Racial

Filter Logic
1 and (2 or 3)

▼ Limit Sections

Report last run May 26th 2023, 4:38 pm
Click to refresh data
Results limited to the first 10 Rows.

First	Last	Date of Birth	Intake Date	Monthly Income at Intake	Race		
Apple	Moore	01/19/1998	03/02/2023	\$985.00	Multi-Racial		
Betsy	Murray	01/22/1998	03/05/2023	\$1,400.00	Multi-Racial	Female	Hispanic
Caitlin	Smith	06/09/1980	04/11/2023	\$0.00			Non-Hispanic
Caitlin	Smith	06/04/1980	04/11/2023	\$0.00			Non-Hispanic
Clementine	Smith	01/18/1998	03/01/2023	\$5,000.00	Multi-Racial	Female	Hispanic
Dave	Robinson	01/25/1998	03/08/2023	\$4,800.00	Black or African American		
Elaie	Larsen	01/26/1998	03/09/2023	\$7,400.00	Black or African American		
John	Black	01/23/1998	03/06/2023	\$785.00	Multi-Racial	Male	Non-Hispanic

meet both parameters

Above income but meet race parameter

Filter Logic

No parenthesis by default which can make data inaccurate

Client Demographics ▾

▼ Forms

- Participant Profile

▼ Filters

- Intake Date Is Between [1/1/2023] and [12/31/2023] ✎
- Monthly Income at Intake Is Less Than 2000
- Race Matches Any Option Asian or Black or African American or Multi-Racial

Filter Logic

1 and 2 or 3

▼ Limit Sections

Report last run May 26th 2023
Click to refresh data

Search Displaying 33 of 33 Rows (Export)

First	Last	Date of Birth	Intake Date	Monthly Income at Intake	Race	Gender	Ethnicity
Summer	Wheatly	06/09/2002	09/12/2016	\$4,500.00	Black or African American	Female	Non-Hispanic
Sondra	Williams	11/17/1980	04/06/2017	\$1,500.00	Black or African American	Female	Hispanic
Sarah	Greene	12/23/1987	07/15/2013	\$2,500.00	Black or African American	Female	Non-Hispanic
Sally	Peacock	01/20/1998	03/03/2023	\$2,400.00	Multi-Racial	Female	Hispanic
Rian	Yu	05/15/1999	04/11/2017	\$3,000.00	Asian	Female	Non-Hispanic
Rachel	Murray	01/21/1998	03/04/2023	\$3,200.00	Multi-Racial	Female	Hispanic
Paul	Brown	01/24/1998	03/07/2023	\$1,100.00	White or Caucasian	Male	Non-Hispanic

Filter Logic

No parenthesis by default which can make data inaccurate

Add context by using parenthesis

The screenshot shows a 'Client Demographics' report interface. It includes sections for 'Forms', 'Filters', 'Filter Logic', and 'Limit Sections'. The 'Filter Logic' section contains a text input field with the value '1 and (2 or 3)'. Below this, there is a message: 'Report last run May 26th 2023, 4:38 pm', 'Click to refresh data', and 'Results limited to the first 10 Rows.' At the bottom, there is a table with 7 columns: First, Last, Date of Birth, Intake Date, Monthly Income at Intake, Race, and Gender. The table contains 3 rows of data.

First	Last	Date of Birth	Intake Date	Monthly Income at Intake	Race	Gender
Apple	Moore	01/19/1998	03/02/2023	\$985.00	Multi-Racial	Female
Betsy	Murray	01/22/1998	03/05/2023	\$1,400.00	Multi-Racial	Female
Caitlin	Smith	06/09/1980	04/11/2023	\$0.00		

Filter Logic

No parenthesis by default which can make data inaccurate

Add context by using parenthesis

Parenthesis informs software which filters the conditions apply to

Client Demographics ▾

▼ Forms

Participant Profile (Always)

▼ Filters

Intake Date Is Between [1/1/2023] and [12/31/2023] ✎

Monthly Income at Intake Is Less Than 2000

Race Matches Any Of Asian or Black or African American or Multi-Racial

Filter Logic

1 and (2 or 3)

▼ Limit Sections

Report last run May 26th 2023, 4:38 pm
Click to refresh data
Results limited to the first 10 Rows.

First	Last	Date of Birth	Intake Date	Monthly Income at Intake	Race	Gender
Apple	Moore	01/19/1998	03/02/2023	\$985.00	Multi-Racial	Female
Betsy	Murray	01/22/1998	03/05/2023	\$1,400.00	Multi-Racial	Female
Caitlin	Smith	06/09/1980	04/11/2023	\$0.00		

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.