

Results Conditional Formatting Webinar

Meet Your Trainer

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Learning Objective

After completing this training, Report Writers will understand how to use Results formatting tools to customize the look and feel of reports.

Agenda

Overview

Creating Rules

Applying Rule to Direct Column

Applying a Rule to Unrelated Column

Conditional Formatting Overview

Conditional Formatting Overview

Conditional Formatting

The purpose of Formatting Rules is to highlight data that meets specific criteria. Formatting can be used to highlight records that have poor data quality, or to alert staff when a participant needs a specific service or is ineligible to receive a service.

In this example, Participants younger than 18 have their DOB highlighted in yellow.

1,633	Kimberley	Keyes	8th Ave Service	1/26/04	Female
1,606	Scott	Hendrick	8th Ave Service	6/13/04	Male
1,575	Marcella	Abe	8th Ave Service	5/19/05	Female
2,379	Alyssa	Navarez	8th Ave Service	7/12/05	Female
1,582	Morgan	Thresher	8th Ave Service	10/9/06	Male
1,614	Karen	Walters	8th Ave Service	7/17/07	Female
1,671	Amos	Tatum	8th Ave Service	8/9/07	Male
1,645	Gilbert	Allen	8th Ave Service	12/22/07	Male
1,650	William	Chen	8th Ave Service	12/24/07	Male
2,432	Bobby	Thomas	8th Ave Service	1/1/08	Male
1,522	Thomas	Jones	8th Ave Service	1/23/08	Male
2,498	Joan	Allen	8th Ave Service	2/6/08	Male
1,640	Brenda	Coffey	8th Ave Service	12/18/08	Female
1,663	Penny	Flowers	8th Ave Service	3/27/09	Female
1,566	Tina	Hall	8th Ave Service	4/5/09	Female

Conditional Formatting Overview

Two main steps

- Create Rule
- Apply Rule

Conditional Formatting Overview

There are Two Steps: Create and Apply

Step 1: Create

1. Go to Analyze > ... > Formatting Rules
2. Click + to open the Create Rule window
3. Name, select filters and/or add conditions, determine format that will be applied, click OK to save the Rule

Step 2: Apply

4. Select which column to apply formatting to and right click > Formatting Rules
5. Check the box for the desired rule and click OK
6. Confirm format was applied correctly based on rule

Creating Rules

Creating Rules

Steps to Create

1. Go to Analyze > ... > Formatting Rules
2. Click + to open the Create Rule window
3. Name, select filters and/or add conditions, determine format that will be applied, click OK to save the Rule

The screenshot illustrates the steps to create a rule in the software. It shows the 'Analyze' menu with 'Formatting Rules...' selected. The 'Create Rule' dialog is open, showing the following details:

- Name:** English Speakers who speak Spanish
- Description:** (Empty field)
- Conditions:**

Filter	Operator	Operands
Primary Language_212	Equal to	English
Secondary Language_213	Equal to	Spanish
- Format:** Cell Contents

Red arrows and numbered callouts (1, 2, 3) indicate the sequence of actions: 1. Clicking the 'Formatting Rules...' option in the 'Analyze' menu; 2. Clicking the '+' button to open the 'Create Rule' dialog; 3. Clicking the 'Format ...' button to specify the format to be applied.

Formatting Rules

Create Rule

Name: English Speakers who speak Spanish

Description:

Add Condition Condition

Filter	Operator	Operands
Primary Language_212	Equal to	English
And		
Secondary Language_213	Equal to	Spanish

Cell Contents

Format ...

3

OK Cancel

Applying Rule to Direct Column

Applying Rule to Direct Column

Steps to Apply

4. Select which column to apply formatting to and right click > Formatting Rules
5. Check the box for the desired rule and click OK
6. Confirm format was applied correctly based on rule

The screenshot illustrates the process of applying a formatting rule to a column in a table. The 'Apply Formatting Rules' dialog box is open, showing a list of rules. The 'DOB = Child' rule is selected, indicated by a checked box and an orange arrow. The dialog box also shows a list of other rules and their descriptions. A context menu is open over the table, with 'Formatting Rules...' highlighted, indicated by a red circle with the number 4. The table shows a date column with yellow highlighting for dates on or after 7/17/07, indicating that the 'DOB = Child' rule has been applied. The 'OK' button is highlighted with a red circle with the number 6, and an orange arrow points to it. The table data is as follows:

DOB = Child	Description
<input checked="" type="checkbox"/>	DOB = Child

1,633	Kimberley				
1,606	Scott				
1,575	Marcella				
2,379	Alyssa				
1,582	Morgan				
1,614	Karen Walters	8th Ave Service	7/17/07	Female	
1,671	Amos Tatum	8th Ave Service	8/9/07	Male	
1,645	Gilbert Allen	8th Ave Service	12/22/07	Male	
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1,522	Thomas Jones	8th Ave Service	1/23/08	Male	
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1,663	Penny Flowers	8th Ave Service	3/27/09	Female	
1,566	Tina Hall	8th Ave Service	4/5/09	Female	

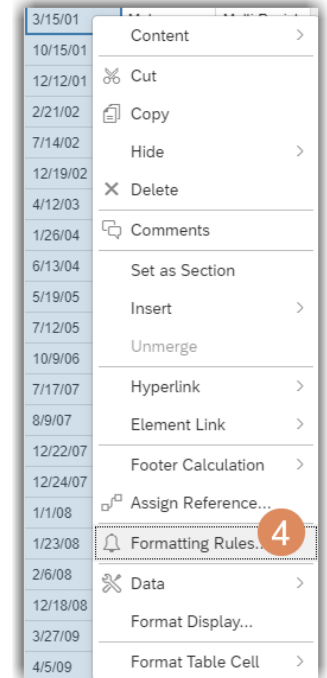
Applying a Rule to unrelated column

Applying Rule to Unrelated Column

Steps to Apply

4. Select which column to apply formatting to and right click > Formatting Rules
5. Check the box for the desired rule and click OK
6. Confirm format was applied correctly based on rule

1,633	Kimberley	Keyes	8th Ave Service	1/26/04	Female
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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
- Boot Camps - Intensive Multiday Trainings that Cover the Basics
- Labs - 2 hr Live Trainings on Specific Topics and Capabilities



Build confidence and 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.