Results: Footer Calculations & References Webinar

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Meet Your Trainer

Jaime Ransom

Training Specialist

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Learning Objective

After completing this training, Report Writers will understand how to use footers to summarize or clarify data in tables, and use references to optimally position this information.

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Agenda

Overview

Footer Calculations

Adding Footer Calculations

Using References

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Overview

Overview

Footer Calculations provide an easy approach to using standardized calculations to the bottom of tables.

2,458	Zane Peacock	1/9/88	Male	Asian
2,463	Xavier Hildebrandt	5/6/72	Male	Other
2,470	Melissa Avila	4/4/74	Female	Other
2,480	Kathy Lee	5/5/76	Female	Caucasian
2,504	Jill Brown	1/1/00	Female	Caucasian
2,516	John Turner	1/1/00	Male	Bi-racial
	Min:	4/9/36		
	Max:	7/12/05		
			Count:	9

Footer Calculations

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Footer Calculations

Available Calculations:

- Count
- Min
- Max
- Sum
- Average
- Percentage

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Footer Calculations

Count

- Provides the total number of unique values in the associated column.

- Most frequently used

- Count Record IDs to identify unique records:
    - Count of Participants
    - Count of Forms/TouchPoints Completed
    - Count of Enrollments
    - Count of Referrals

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Footer Calculations

Minimum / Maximum

- Numeric - Min is the smallest number, Max is the largest
- Text - Min is the lowest value alphabetically, Max is the highest
- Date - Min is the earliest date chronologically, Max is the latest

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Footer Calculations

Sum

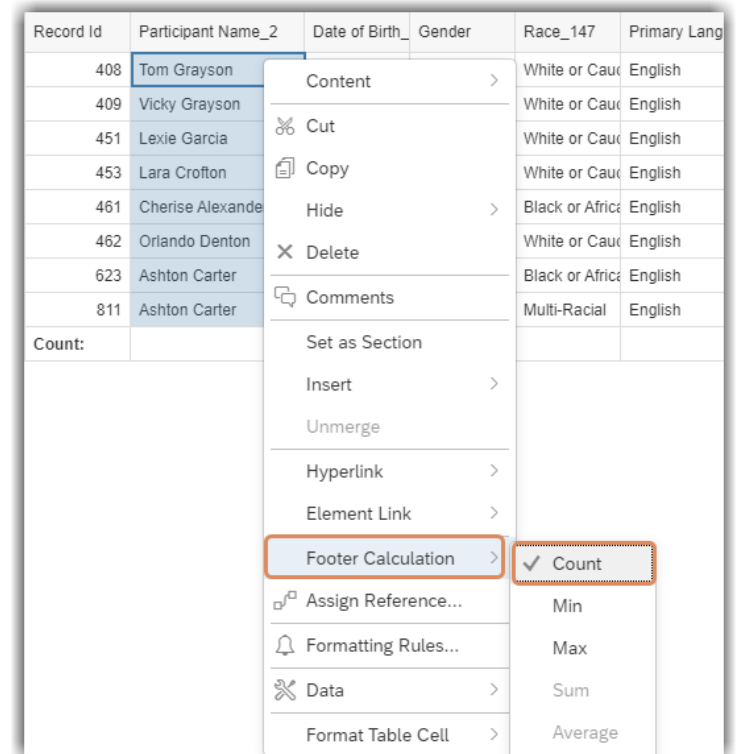- Totals the values in the column above
- Only available for Numeric data

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Footer Calculations

Average / Percentage

- Displays the Average of Values, or Percentage of Total, based on the values in the column
- Only available for Numeric data

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Adding Footer Calculations

Adding Footer Calculations

- Select a column, right click and select Footer Calculation

- Choose the desired calculation(s)

Adding Footer Calculations

The result will appear in the last row of the table on the last page of the report tab.

You can remove a Footer Calculation by visiting the same menu and unchecking it.

References

References

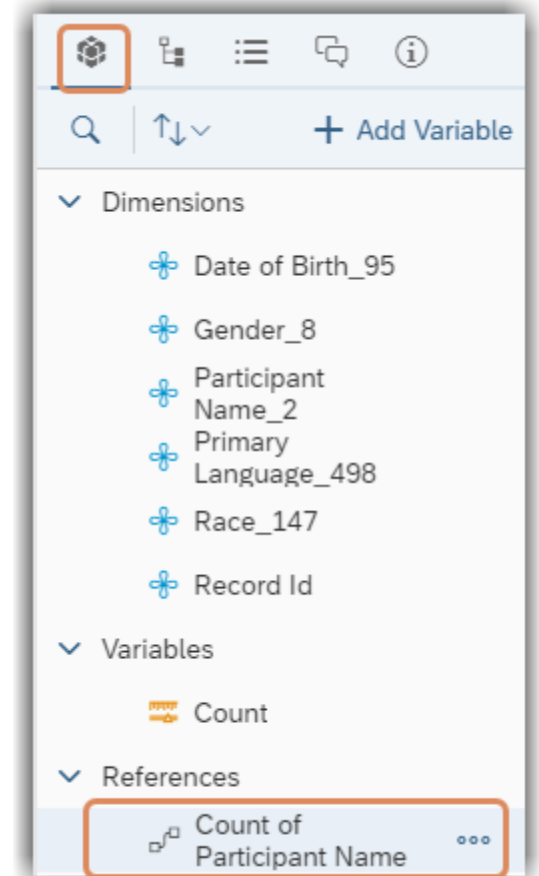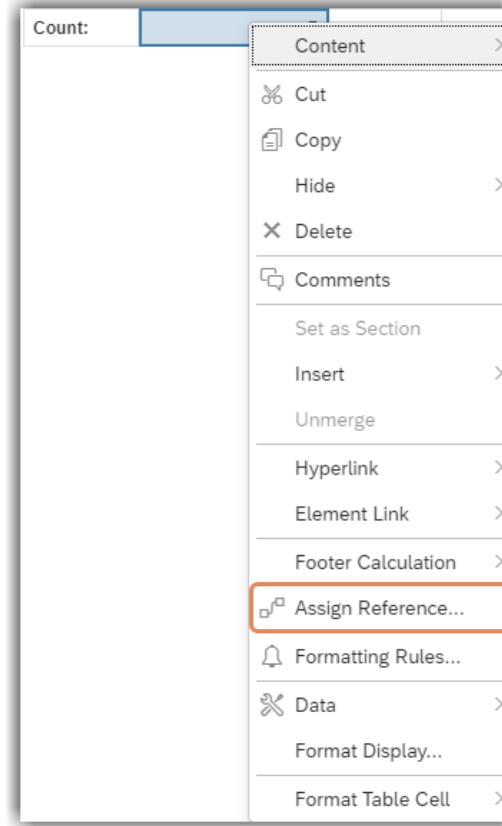References allow for the creation of a pointer to another cell, so the value can be displayed in other locations.

Non-dynamic: only reflects the value in the source cell

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Adding a Reference

Select the desired cell, right-click and select Assign Reference.

Name the Reference – use a unique name or tag.

Reference will be added to bottom of Document Objects.

Additional Resources

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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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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

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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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