

Formula Bar and Variable Editor Webinar

Meet Your Trainer

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Learning Objective

Help Report Writers understand best practices for creating popular advanced formulas and/or variables in results so that users confidently know when to use which tool when designing Results reports.

Agenda

Formula Bar

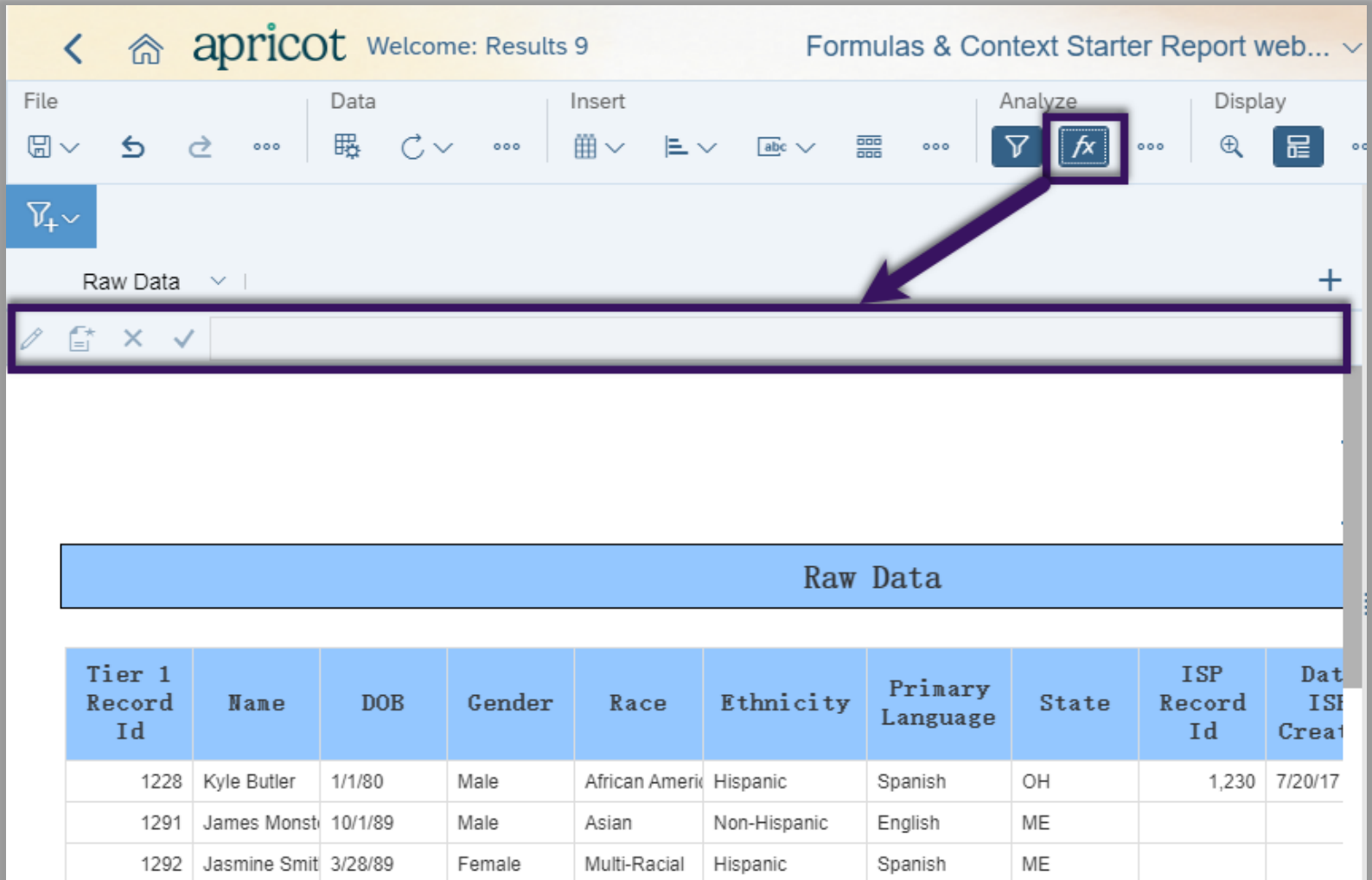
Variable Editor

Popular Advanced
Formulas

Formula Bar

Formula Bar

- Window into a cell
- Viewed in 2 ways
 - Click a cell to view bar
 - Click F(x) to collapse or expand



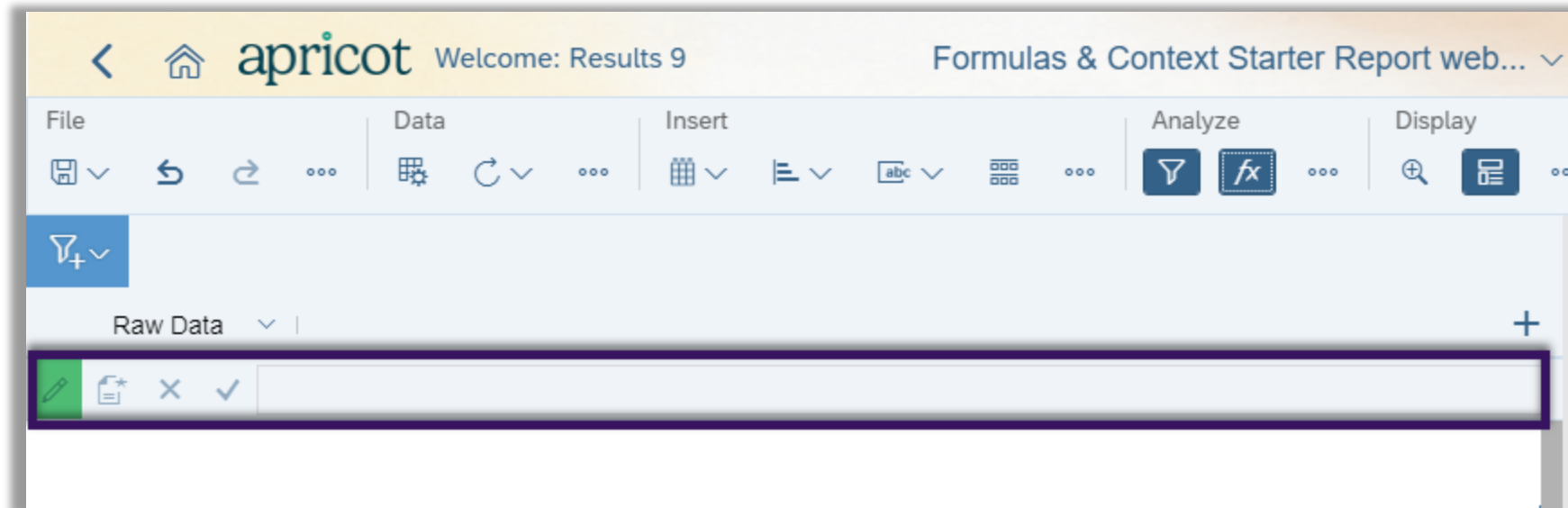
The screenshot shows the Apricot web application interface. The top navigation bar includes a home icon, the text "apricot", and "Welcome: Results 9". The main title is "Formulas & Context Starter Report web...". The interface features a menu bar with "File", "Data", "Insert", "Analyze", and "Display". The "Analyze" menu is open, showing a filter icon and a formula icon (fx) which is highlighted with a purple box. A purple arrow points from the formula icon to the Formula Bar below. The Formula Bar is a horizontal input field with a purple border, containing a pencil icon, a plus icon, a close icon (x), and a checkmark icon. Below the Formula Bar is a table titled "Raw Data" with the following columns: Tier 1 Record Id, Name, DOB, Gender, Race, Ethnicity, Primary Language, State, ISP Record Id, and Date of Birth. The table contains three rows of data.

Tier 1 Record Id	Name	DOB	Gender	Race	Ethnicity	Primary Language	State	ISP Record Id	Date of Birth
1228	Kyle Butler	1/1/80	Male	African American	Hispanic	Spanish	OH	1,230	7/20/17
1291	James Monst	10/1/89	Male	Asian	Non-Hispanic	English	ME		
1292	Jasmine Smit	3/28/89	Female	Multi-Racial	Hispanic	Spanish	ME		

Formula Bar

Four Icons

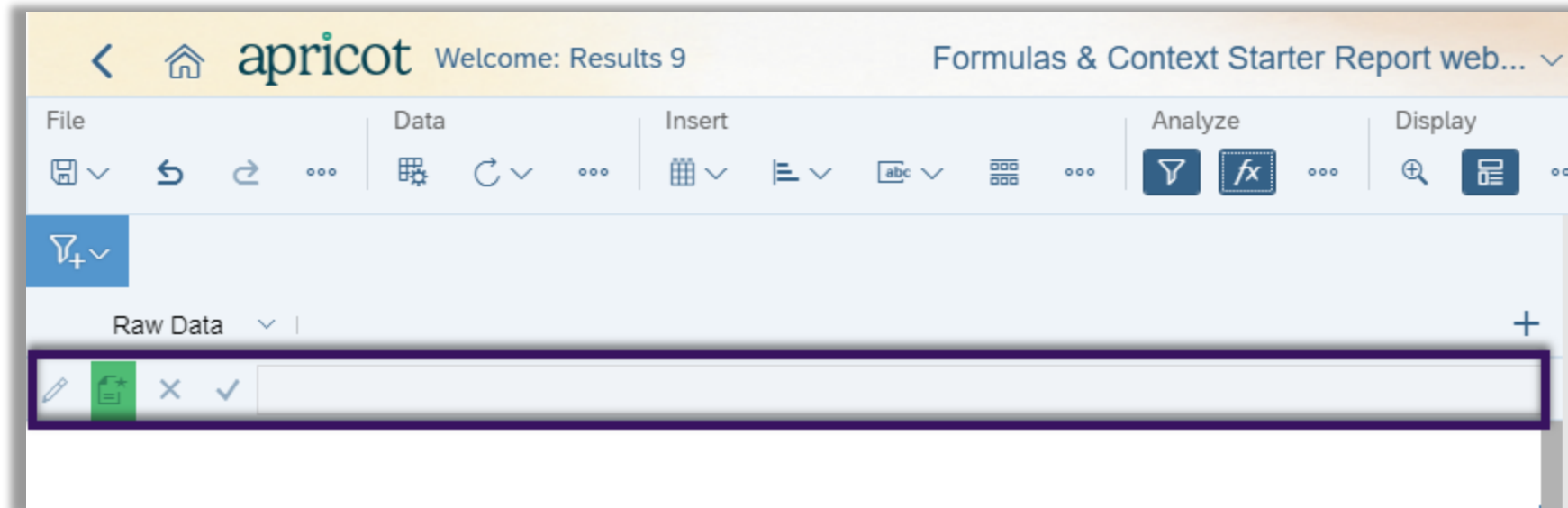
- Formula Editor (pencil icon)



Formula Bar

Four Icons

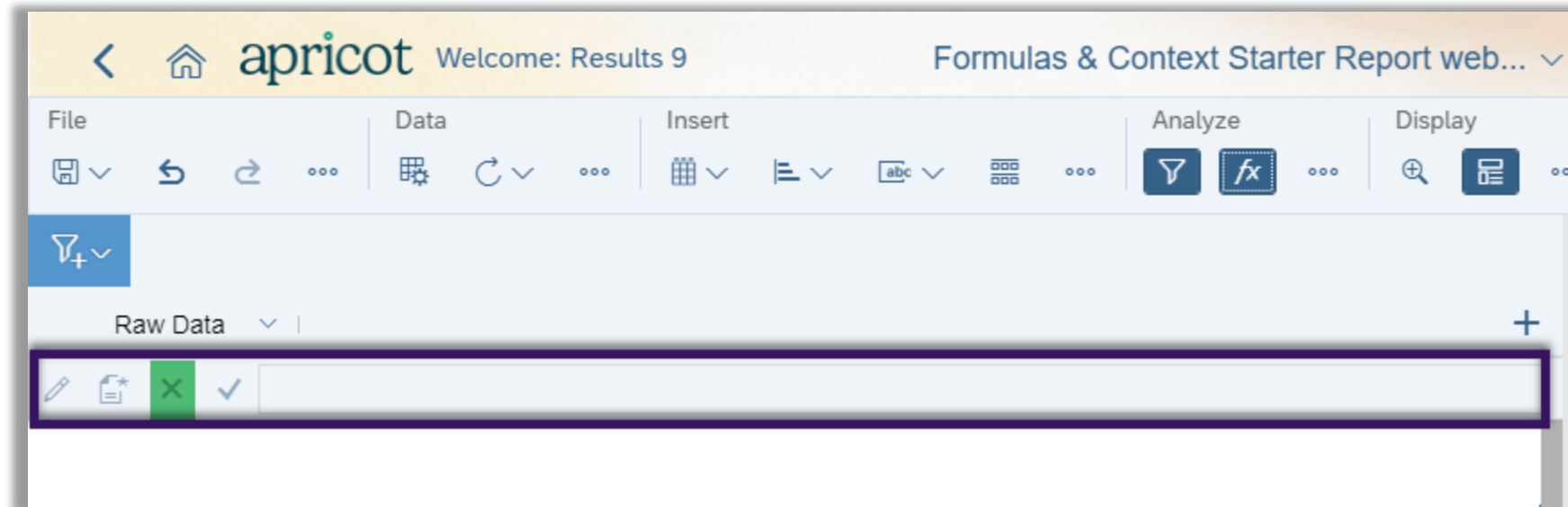
- Formula Editor (pencil icon)
- Create Variable (paper icon)



Formula Bar

Four Icons

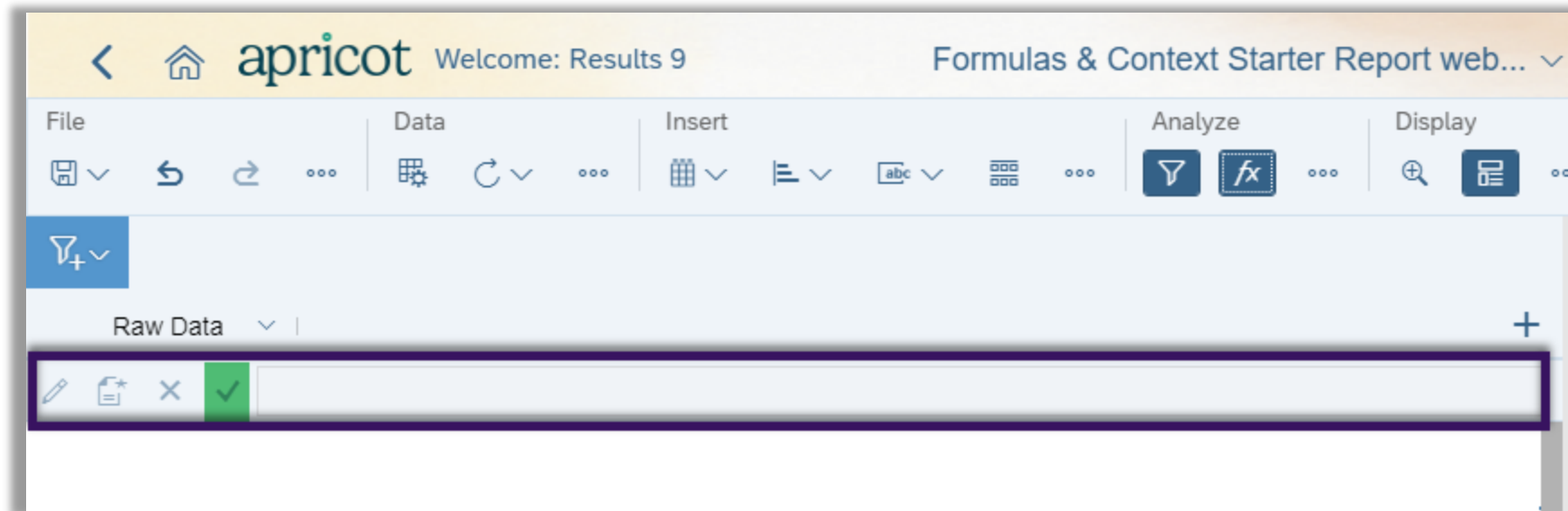
- Formula Editor (pencil icon)
- Create Variable (paper icon)
- Cancel Button (X icon)



Formula Bar

Four Icons

- Formula Editor (pencil icon)
- Create Variable (paper icon)
- Cancel Button (X icon)
- Validate Button (check mark icon)



Variable Editor

What is a Variable?

- A reusable formula
- Saves time
- Simplifies report design

County

Geolocation

Zip

Variables

Age

Count

Count of Services

Sum of Time

What is a Variable?

- A reusable formula
- Saves time
- Simplifies report design
- Accessed under Available Document Objects menu

The screenshot displays the Apricot software interface. The top navigation bar includes the Apricot logo, 'Welcome: Results 9', and the title 'Formulas & Context Starter Report web...'. The menu bar contains 'File', 'Data', 'Insert', 'Analyze', and 'Display'. The main workspace shows a 'Raw Data' table with columns: Tier 1 Record Id, Name, DOB, Gender, Race, Ethnicity, Primary Language. A right-hand panel displays 'Dimensions' with a list of variables like 'Category_1841', 'Date of Birth_199', etc. A 'Block 1' panel is open, showing a 'Turn Into...' dropdown, 'Data Assignment', and 'Columns (12)'. A '+ Add Variable' button is highlighted with a red box and a '2' in a red circle. A red circle with '1' highlights a gear icon in the top right of the workspace.

Variable Editor

Four Components

- Name

The screenshot shows the 'Create Variable' dialog box. It has a title bar with the text 'Create Variable' and a close button. The main area is divided into several sections:

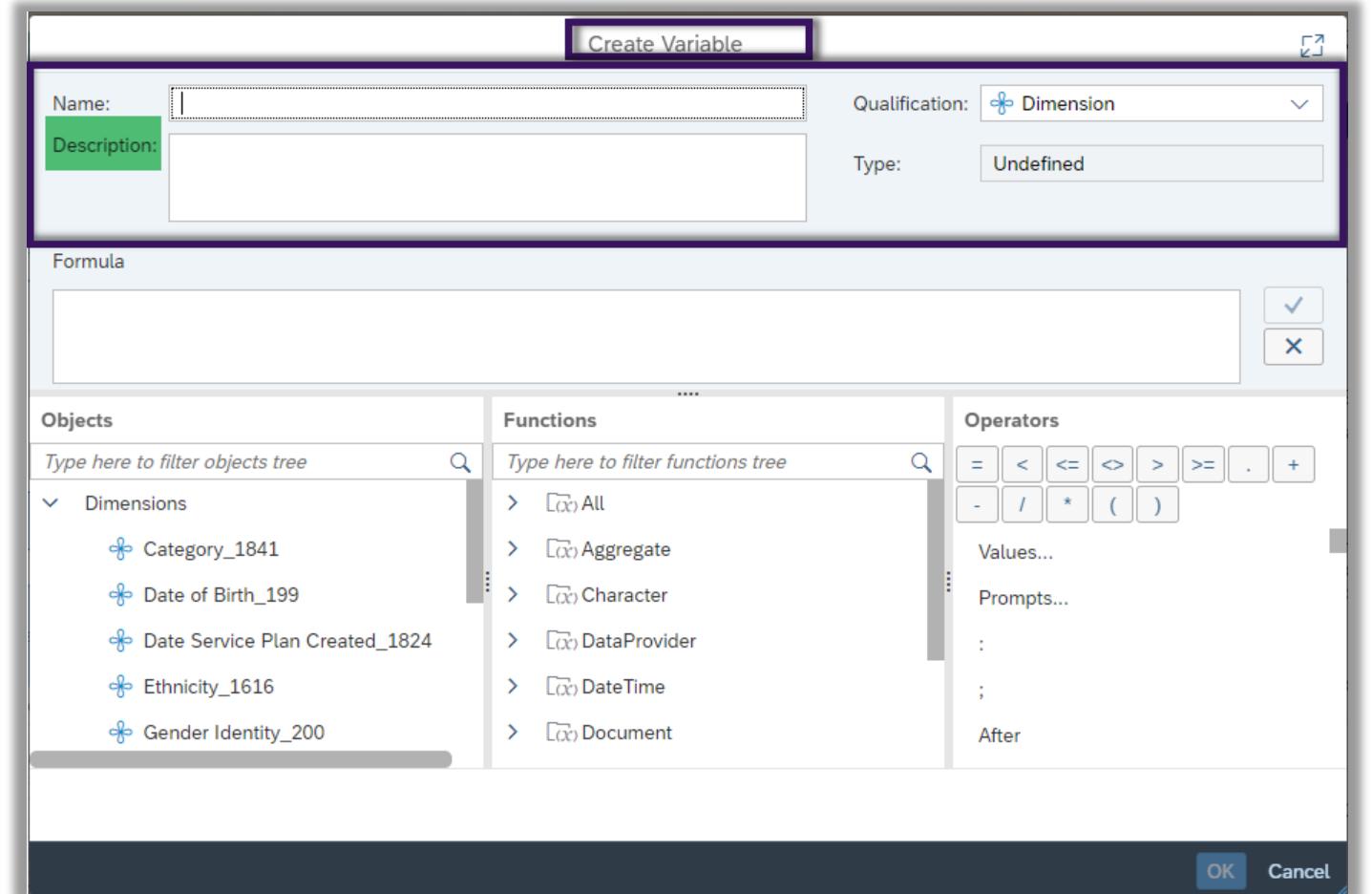
- Name:** A text input field.
- Description:** A larger text input area.
- Qualification:** A dropdown menu currently showing 'Dimension'.
- Type:** A dropdown menu currently showing 'Undefined'.
- Formula:** A large text area for entering a formula, with 'OK' and 'Cancel' buttons to its right.
- Objects:** A tree view showing a list of dimensions under the 'Dimensions' folder, including 'Category_1841', 'Date of Birth_199', 'Date Service Plan Created_1824', 'Ethnicity_1616', and 'Gender Identity_200'.
- Functions:** A tree view showing a list of functions under the 'Functions' folder, including 'All', 'Aggregate', 'Character', 'DataProvider', 'DateTime', and 'Document'.
- Operators:** A panel showing various operators: '=', '<', '<=', '<>', '>', '>=', '.', '+', '-', '/', '*', '(', ')'. Below these are sections for 'Values...', 'Prompts...', ':', ';', and 'After'.

At the bottom right of the dialog, there are 'OK' and 'Cancel' buttons.

Variable Editor

Four Components

- Name
- Description



The screenshot shows the 'Create Variable' dialog box. The 'Name' field is empty, and the 'Description' field is highlighted in green. The 'Qualification' dropdown is set to 'Dimension', and the 'Type' dropdown is set to 'Undefined'. The 'Formula' section is empty. The 'Objects' panel shows a search bar and a list of dimensions: 'Category_1841', 'Date of Birth_199', 'Date Service Plan Created_1824', 'Ethnicity_1616', and 'Gender Identity_200'. The 'Functions' panel shows a search bar and a list of functions: 'All', 'Aggregate', 'Character', 'DataProvider', 'DateTime', and 'Document'. The 'Operators' panel shows a search bar and a list of operators: '=', '<', '<=', '<>', '>', '>=', '.', '+', '-', '/', '*', '(', ')'. The 'Values...', 'Prompts...', ':', ';', and 'After' sections are also visible. The 'OK' and 'Cancel' buttons are at the bottom right.

Variable Editor

Four Components

- Name
- Description
- Qualification

The screenshot shows the 'Create Variable' dialog box. The 'Name' field is empty. The 'Description' field is empty. The 'Qualification' dropdown is set to 'Dimension'. The 'Type' dropdown is set to 'Undefined'. The 'Formula' field is empty. The 'Objects' list shows a tree structure under 'Dimensions' with items: 'Category_1841', 'Date of Birth_199', 'Date Service Plan Created_1824', 'Ethnicity_1616', and 'Gender Identity_200'. The 'Functions' list shows a tree structure with items: '

Variable Editor

Four Components

- Name
- Description
- Qualification
 - Dimension
 - Measure
 - Detail

Create Variable

Name:

Description:

Qualification:

Type:

Formula

Objects

Type here to filter objects tree

- Dimensions
 - Category_1841
 - Date of Birth_199
 - Date Service Plan Created_1824
 - Ethnicity_1616
 - Gender Identity_200

Functions

Type here to filter functions tree

- All
- Aggregate
- Character
- DataProvider
- DateTime
- Document

Operators

= < <= <> > >= . +

- / * ()

Values...

Prompts...

:

;

After

Variable Editor

Four Components

- Name
- Description
- Qualification
- Type

Create Variable

Name:

Description:

Qualification:

Type:

Formula

Objects

Type here to filter objects tree

- Dimensions
 - Category_1841
 - Date of Birth_199
 - Date Service Plan Created_1824
 - Ethnicity_1616
 - Gender Identity_200

Functions

Type here to filter functions tree

- All
- Aggregate
- Character
- DataProvider
- DateTime
- Document

Operators

= < <= <> > >= . +

- / * ()

Values...

Prompts...

:

;

After

OK Cancel

Popular Advanced Formulas

Popular Formulas

Year (or Month, Day, etc)

- Allows for simple aggregation for time periods, which can be utilized in filtering or chart creation
- =Year([Date of Service])

Year	Count
2016	57
2017	147
2018	4
2020	2

Popular Formulas

Display Null Values with other Text

- Especially helpful for use in Input Controls, Report Filters, Summary Tables, and Charts

=If [Data Object]>="!" Then [Data Object] Else "Unanswered"

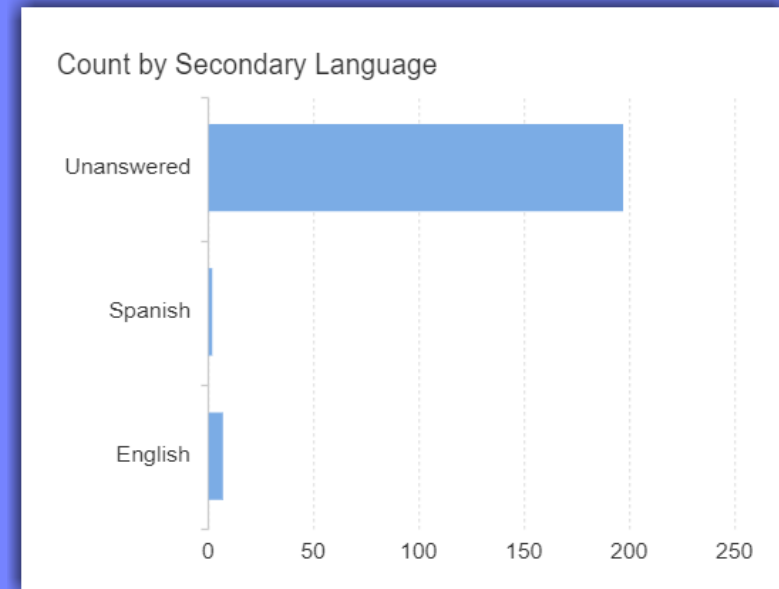
OR

=If IsNull([Data Object]) Then "Unanswered" Else [Data Object]

- >=! Formulas are relied on more in Apricot
- If IsNull Formulas are relied on more in ETO

Secondary Language_213	Secondary Language
	Unanswered
	Unanswered
	Unanswered
	Unanswered
	Unanswered
English	English
Spanish	Spanish
English	English
	Unanswered
	Unanswered
	Unanswered
Spanish	Spanish

Count	Secondary Language
7	English
2	Spanish
197	Unanswered



Popular Formulas

Calculate Age based on Today's Date

- Revise name of Date of Birth field name in formula to match the Object in your report

=DatesBetween([Date of Birth];CurrentDate();YearPeriod)

DOB	Age
1/1/80	42
1/19/53	69
11/11/89	32
10/1/75	46
3/22/90	31
1/1/45	77
1/1/65	57
10/21/11	10
3/23/00	21
9/4/68	53

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.

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.