

# Results Formula Basics Webinar

# Meet Your Trainer

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# Learning Objective

Help Report Writers develop a strong foundation for writing formulas in results so that users feel confident when working with the variable editor within Results reports.

# Agenda

Formula Overview

Formula Components

General Syntax Rules

# Formula Overview

# Formula Overview

## Two Common Purposes

- Customize how data is displayed
- Create custom calculations

The screenshot displays the Apricot application interface. In the background, a data table is visible with columns for Name, DOB, Gender, and Race. The 'Gender' column is highlighted with a purple box. Overlaid on this is the 'Formula Editor' dialog box. The 'Formula' field contains the text: `=If [Gender Identity_200]>="!" Then [Gender Identity_200] Else "Unanswered"`. Below the formula field are three panels: 'Objects' (listing dimensions like Category\_1841, Date of Birth\_199, etc.), 'Functions' (listing categories like All, Aggregate, Character, etc.), and 'Operators' (listing symbols like =, <, <=, <>, >, >=, ., +, -, /, \*, (, ), Values..., Prompts..., :, ;, After, All, And). The 'OK' and 'Cancel' buttons are at the bottom right of the dialog.

# Formula Components

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## Four Components

- Data

The screenshot displays the 'Formula Editor' window. At the top, the title bar reads 'Formula Editor'. Below it, a text area contains the formula: `If [Gender Identity_200]>="!" Then [Gender Identity_200] Else "Unanswered"`. The text area has a checkmark button on the right. Below the formula area are three panels: 'Objects', 'Functions', and 'Operators'. The 'Objects' panel is highlighted with a purple box and contains a search bar and a list of dimensions including 'Category\_1841', 'Date of Birth\_199', 'Date Service Plan Created\_1824', 'Ethnicity\_1616', 'Gender Identity\_200', 'Individual Service Plan\_88.Record Id', and 'Name\_198'. The 'Functions' panel also has a search bar and lists categories like 'All', 'Aggregate', 'Character', 'DataProvider', 'DateTime', 'Document', 'Logical', and 'Misc'. The 'Operators' panel shows various symbols for comparison and arithmetic, such as '=', '<', '<=', '<>', '>', '>=', '.', '+', '-', '/', '\*', and '(', ')'. At the bottom right, there are 'OK' and 'Cancel' buttons.



# Formula Components

## Four Components

- Data
- Functions

The screenshot displays the 'Formula Editor' window. At the top, the title bar reads 'Formula Editor'. Below it, a text area contains the formula: `=If [Gender Identity_200]>="!" Then [Gender Identity_200] Else "Unanswered"`. The words 'If', 'Then', and 'Else' are highlighted in green. To the right of the formula are 'OK' and 'Cancel' buttons. Below the formula editor, there are three panels: 'Objects', 'Functions', and 'Operators'. The 'Functions' panel is highlighted with a purple box. The 'Objects' panel shows a tree view under 'Dimensions' with items like 'Category\_1841', 'Date of Birth\_199', 'Date Service Plan Created\_1824', 'Ethnicity\_1616', 'Gender Identity\_200', 'Individual Service Plan\_88.Record Id', and 'Name\_198'. The 'Functions' panel has a search bar and a list of function categories: 'All', 'Aggregate', 'Character', 'DataProvider', 'DateTime', 'Document', 'Logical', and 'Misc'. The 'Operators' panel shows various operators: '=', '<', '<=', '<>', '>', '>=', '.', '+', '-', '/', '\*', '(', ')', 'Values...', 'Prompts...', ':', ';', 'After', 'All', and 'And'. At the bottom right, there are 'OK' and 'Cancel' buttons.

# Formula Components

## Four Components

- Data
- Functions
- Operators

The screenshot displays the 'Formula Editor' window. At the top, the title bar reads 'Formula Editor'. Below it, a text area contains the formula: `IF [Gender Identity_200] >= "!" Then [Gender Identity_200] Else "Unanswered"`. The operator `>=` is highlighted in green. To the right of the formula are 'OK' and 'Cancel' buttons. Below the formula editor are three panels: 'Objects', 'Functions', and 'Operators'. The 'Objects' panel shows a tree view under 'Dimensions' with items like 'Category\_1841', 'Date of Birth\_199', 'Date Service Plan Created\_1824', 'Ethnicity\_1616', 'Gender Identity\_200', 'Individual Service Plan\_88.Record Id', and 'Name\_198'. The 'Functions' panel shows a tree view with categories like 'All', 'Aggregate', 'Character', 'DataProvider', 'DateTime', 'Document', 'Logical', and 'Misc'. The 'Operators' panel is highlighted with a red box and contains a list of operators: '=', '<', '<=', '<>', '>', '>=', '.', '+', '-', '/', '\*', '(', ')'. Below the operators are sections for 'Values...', 'Prompts...', ':', ';', 'After', 'All', and 'And'. At the bottom right of the window are 'OK' and 'Cancel' buttons.

# Formula Components

## Four Components

- Data
- Functions
- Operators
- Syntax

The screenshot displays the 'Formula Editor' window. At the top, the title bar reads 'Formula Editor'. Below it, a text box labeled 'Formula' contains the text: `IF [Gender Identity_200]>="!" Then [Gender Identity_200] Else "Unanswered"`. The text `"Unanswered"` is highlighted with a purple box. To the right of the text box are two buttons: a checkmark (OK) and an 'X' (Cancel). Below the formula text box are three panels: 'Objects', 'Functions', and 'Operators'. The 'Objects' panel has a search bar and a list of dimensions including 'Category\_1841', 'Date of Birth\_199', 'Date Service Plan Created\_1824', 'Ethnicity\_1616', 'Gender Identity\_200', 'Individual Service Plan\_88.Record Id', and 'Name\_198'. The 'Functions' panel has a search bar and a list of function categories like 'All', 'Aggregate', 'Character', 'DataProvider', 'DateTime', 'Document', 'Logical', and 'Misc'. The 'Operators' panel has a search bar and a list of operators including '=', '<', '<=', '<>', '>', '>=', '.', '+', '-', '/', '\*', '(', ')', 'Values...', 'Prompts...', ':', ';', 'After', 'All', and 'And'. At the bottom right of the window are 'OK' and 'Cancel' buttons.

# Formula Components

## Four Components

- Data
- Functions
- Operators
- Syntax

**look at the dog brown**

# Formula Components

## Four Components

- Data
- Functions
- Operators
- Syntax

**Look at the brown dog.**

# General Syntax Rules

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## Objects & Variables

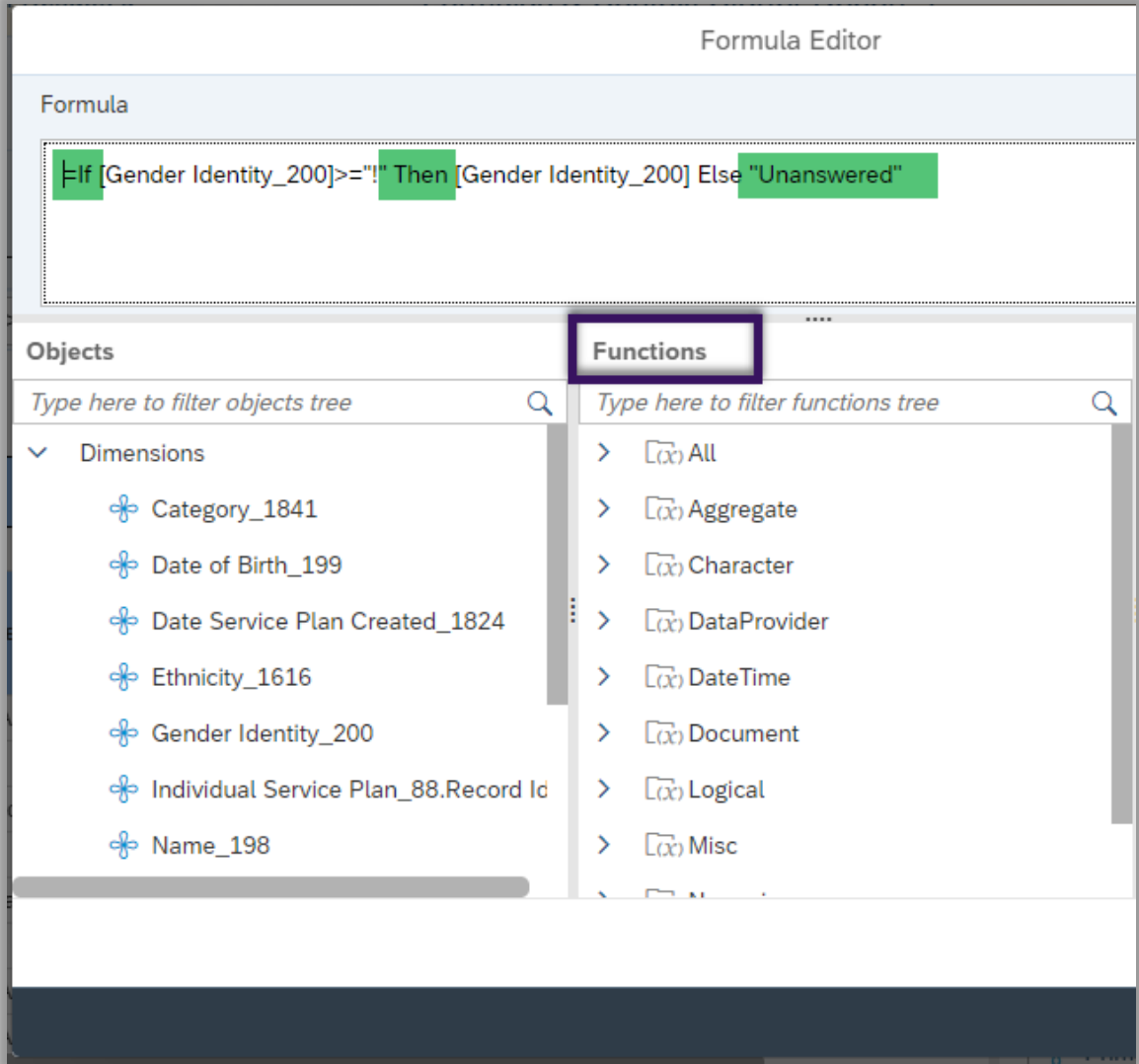
- Enclosed in brackets [ ]
- Same name includes Query Name in brackets
- Select from Object box.

The screenshot displays the 'Formula Editor' interface. At the top, the title 'Formula Editor' is visible. Below it, a text area labeled 'Formula' contains the following code: `If [Gender Identity_200]>="!" Then [Gender Identity_200] Else "Unanswered"`. The text `[Gender Identity_200]` is highlighted in green. Below the formula editor, there are two panels: 'Objects' and 'Functions'. The 'Objects' panel is highlighted with a purple border and contains a search bar with the text 'Type here to filter objects tree' and a magnifying glass icon. Below the search bar, a list of objects is shown under the 'Dimensions' category, including 'Category\_1841', 'Date of Birth\_199', 'Date Service Plan Created\_1824', 'Ethnicity\_1616', 'Gender Identity\_200', 'Individual Service Plan\_88.Record Id', and 'Name\_198'. The 'Functions' panel also has a search bar with the text 'Type here to filter functions tree' and a magnifying glass icon. Below the search bar, a list of function categories is shown, including 'All', 'Aggregate', 'Character', 'DataProvider', 'DateTime', 'Document', 'Logical', and 'Misc'.

# General Syntax Rules

## Formulas

- All formulas start with =
- String values show in quotes ( " , *not* " )
- Enclose all functions in parenthesis
  - \*Except If/Then
- Separate different objects within semicolon



The screenshot displays the 'Formula Editor' interface. At the top, the title 'Formula Editor' is centered. Below it, a 'Formula' field contains the text: `=If [Gender Identity_200]>="!" Then [Gender Identity_200] Else "Unanswered"`. The words 'If', 'Then', and 'Else' are highlighted in green. Below the formula field, there are two panels: 'Objects' and 'Functions'. The 'Objects' panel has a search bar and a list of dimensions including 'Category\_1841', 'Date of Birth\_199', 'Date Service Plan Created\_1824', 'Ethnicity\_1616', 'Gender Identity\_200', 'Individual Service Plan\_88.Record Id', and 'Name\_198'. The 'Functions' panel is highlighted with a purple box and has a search bar and a list of function categories including 'All', 'Aggregate', 'Character', 'DataProvider', 'DateTime', 'Document', 'Logical', and 'Misc'.



# General Syntax Rules

## Importance of Identifiers

- Ensure data quality
- Basic ingredient for formulas
- Best practice to always include in Query Results

Participant Name_2	Gender_8
Alvy Singer	Male
Asher Billingslea	Male
Austin Hill	Male
Heather Carter	Female

Record Id	Participant Name_2	Gender_8
35	Asher Billingslea	Male
239	Alvy Singer	Male
463	Austin Hill	Male
624	Heather Carter	Female
1,180	Austin Hill	Male

# 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](mailto: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.