

Results Ordering & Sorting Data Webinar

Meet Your Trainer

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Learning Objective

Help Report Writers understand how the default ordering of data in results and how to use sorting tool to customize the layout of data within Results reports.

Agenda

Default Ordering

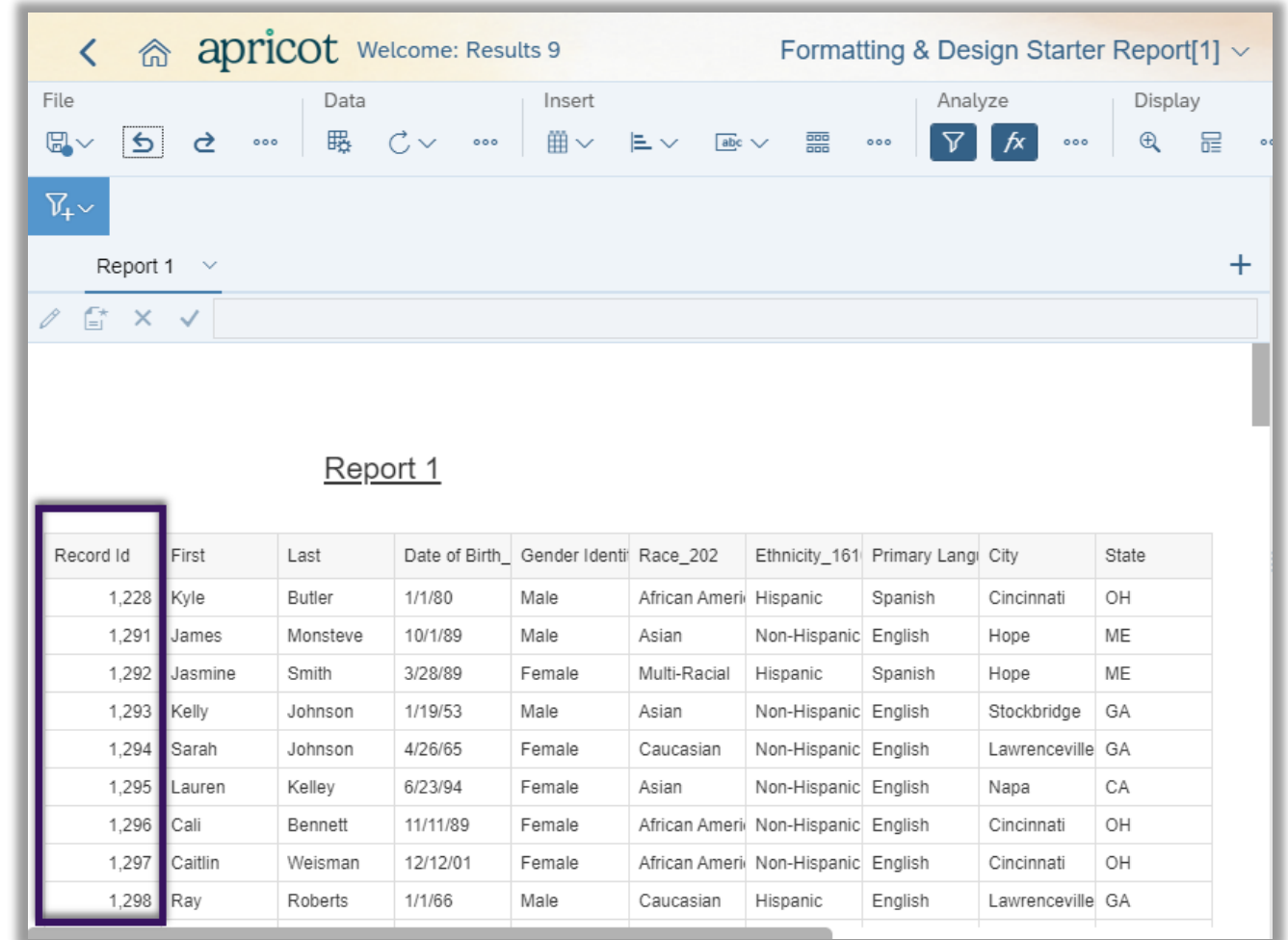
Sorting Tool

Advanced Sorting

Default Ordering

Default Ordering

- Based on first column of table
- Ascending order



The screenshot shows the Apricot software interface. The top navigation bar includes a home icon, the 'apricot' logo, 'Welcome: Results 9', and a dropdown menu for 'Formatting & Design Starter Report[1]'. Below this is a ribbon with tabs for 'File', 'Data', 'Insert', 'Analyze', and 'Display'. The 'Analyze' tab is active, showing a filter icon and a formula icon. Below the ribbon is a 'Report 1' dropdown menu. The main content area displays a table titled 'Report 1'. The table has 10 columns: 'Record Id', 'First', 'Last', 'Date of Birth_', 'Gender Identifi', 'Race_202', 'Ethnicity_161', 'Primary Lang', 'City', and 'State'. The 'Record Id' column is highlighted with a purple box, indicating it is the default sorting key. The data is sorted in ascending order of 'Record Id'.

Record Id	First	Last	Date of Birth_	Gender Identifi	Race_202	Ethnicity_161	Primary Lang	City	State
1,228	Kyle	Butler	1/1/80	Male	African Ameri	Hispanic	Spanish	Cincinnati	OH
1,291	James	Monsteve	10/1/89	Male	Asian	Non-Hispanic	English	Hope	ME
1,292	Jasmine	Smith	3/28/89	Female	Multi-Racial	Hispanic	Spanish	Hope	ME
1,293	Kelly	Johnson	1/19/53	Male	Asian	Non-Hispanic	English	Stockbridge	GA
1,294	Sarah	Johnson	4/26/65	Female	Caucasian	Non-Hispanic	English	Lawrenceville	GA
1,295	Lauren	Kelley	6/23/94	Female	Asian	Non-Hispanic	English	Napa	CA
1,296	Cali	Bennett	11/11/89	Female	African Ameri	Non-Hispanic	English	Cincinnati	OH
1,297	Caitlin	Weisman	12/12/01	Female	African Ameri	Non-Hispanic	English	Cincinnati	OH
1,298	Ray	Roberts	1/1/66	Male	Caucasian	Hispanic	English	Lawrenceville	GA

Default Ordering

- Based on first column of table
- Ascending order
- Two ways to modify
 - Re – order columns
 - Use Sort Tool

The screenshot shows the Apricot software interface. At the top, there is a navigation bar with a home icon, the text 'apricot', and 'Welcome: Results 9'. To the right, it says 'Formatting & Design Starter Report[1]'. Below this is a ribbon with tabs for 'File', 'Data', 'Insert', 'Analyze', and 'Display'. The 'Analyze' tab is active, showing a filter icon and a formula icon. Below the ribbon, there is a 'Report 1' dropdown menu. The main area displays a table titled 'Report 1'. The table has 10 columns: 'Last', 'Record Id', 'First', 'Date of Birth_', 'Gender Identifi', 'Race_202', 'Ethnicity_161', 'Primary Lang', 'City', and 'State'. The 'Last' column is highlighted with a blue border. The formula bar above the table shows '=NameOf([Last])'. The table data is as follows:

Last	Record Id	First	Date of Birth_	Gender Identifi	Race_202	Ethnicity_161	Primary Lang	City	State
Abe	1,575	Marcella	5/19/05	Female	African Ameri	Non-Hispanic	English		
Adkins	1,544	Stephanie	12/16/51	Female	Caucasian	Non-Hispanic	English	Austin	TX
Adkins	1,670	Lynne	6/17/41	Female	Caucasian	Non-Hispanic	English	Austin	TX
Allen	1,645	Gilbert	12/22/07	Male	Caucasian	Non-Hispanic	English	Austin	TX
Allen	1,680	Joseph	11/25/54	Male	Bi-racial	Non-Hispanic	English	Austin	TX
Allen	2,498	Joan	2/6/08	Transgender	Multi-Racial	Hispanic	Don't Know/R		
Allison	1,595	Nancy	8/10/92	Female	Caucasian	Non-Hispanic	English	Austin	TX
Alston	1,562	Evelyn	10/27/33	Female	Caucasian	Non-Hispanic	English		
Amonsta	1,300	John	3/22/90	Male	Caucasian	Hispanic	English	Houston	TX

Sorting Tool

Sorting Tool

- Accessed under the Show Report Element Data
- Apply to single or multiple columns
- Can be removed if needed

The screenshot shows the Apricot software interface. At the top, there is a navigation bar with the text "apricot Welcome: Results 9" and "Formatting & Design Starter Report[1]...". Below this is a ribbon with tabs for "Data", "Insert", "Analyze", "Display", and "Navigate". The "Analyze" tab is active, showing a filter icon and a formula bar containing "=NameOf([First])".

The main area displays a table titled "Report 1" with the following data:

First	Last	Date of Birth_	Gender Identifi	Race_202	Ethnicity_161	Primary Lang	City	State
Abigail	Lamb	8/10/92	Female	Multi-Racial	Non-Hispanic	English	Austin	TX
Adriane	Northrop	3/13/96	Female	Native Americ	Non-Hispanic	Spanish	Hope	ME
Alicia	Leander	1/1/01	Female	African Ameri	Hispanic	Spanish	Baltimore	MD
Alyssa	Navarez	7/12/05	Female	Caucasian	Hispanic	English	Cincinnati	OH
Amanda	Clifford	1/11/53	Female	Asian	Non-Hispanic	English		
Amelia	Deering	10/17/28	Female	Multi-Racial	Non-Hispanic	English		
Amos	Tatum	8/9/07	Male	Bi-racial	Hispanic	English	Poughkeepsie	NY

On the right side, there is a "Table Cell" panel. It contains a "Rows (2)" section with two sorting options: "First Sort ascending" and "Last Sort ascending". A purple box highlights the "Last Sort ascending" option, and a hand cursor is pointing at it. Another purple box highlights the "Add a sort" button at the bottom of the panel.

Sorting Tool

Steps

1. Click the Column or Table
2. Click the Wrench and Screwdriver Icon
3. Click the Up and Down Arrow Icon
4. Select desired column to sort by in drop down
5. Refine the Sort (optional)

The screenshot shows the Apricot software interface with the following elements:

- Top Bar:** Navigation icons, "apricot" logo, "Welcome: Results 9", and "Formatting & Design Starter Report[1]..."
- Ribbon:** File, Data, Insert, Analyze, Display, and Navigate tabs with various icons.
- Table:** A table titled "Report 1" with columns: Record Id, First, Last, Date of Birth, Gender Identif, Race_202, Ethnicity_161, Primary Lang, City, and State. The "First" column header is highlighted with a blue box and a circled "1".
- Table Cell Panel:** A panel on the right showing sorting options for "Rows (2)". It lists "First" and "Last" columns, each with a "Sort ascending" option. A circled "2" points to the wrench and screwdriver icon, a circled "3" to the up and down arrow icon, a circled "4" to the "Add a sort" dropdown menu, and a circled "5" to the "Sort ascending" option for the "Last" column.

Advanced Sorting

Advanced Sorting

- Sorting on multiple columns
- Creates a hierarchy
- Based on first field added

The screenshot shows the Apricot software interface. The main window displays a table titled "Report 1" with the following data:

Record Id	First	Last	Date of Birth	Gender Ident	Race_202	Ethnicity_161	Primary Lang	City	State
1,575	Marcella	Abe	5/19/05	Female	African Ameri	Non-Hispanic	English		
1,670	Lynne	Adkins	6/17/41	Female	Caucasian	Non-Hispanic	English	Austin	TX
1,544	Stephanie	Adkins	12/16/51	Female	Caucasian	Non-Hispanic	English	Austin	TX
1,645	Gilbert	Allen	12/22/07	Male	Caucasian	Non-Hispanic	English	Austin	TX
2,498	Joan	Allen	2/6/08	Transgender	Multi-Racial	Hispanic	Don't Know/R		
1,680	Joseph	Allen	11/25/54	Male	Bi-racial	Non-Hispanic	English	Austin	TX
1,595	Nancy	Allison	8/10/92	Female	Caucasian	Non-Hispanic	English	Austin	TX
1,562	Evelyn	Alston	10/27/33	Female	Caucasian	Non-Hispanic	English		
1,300	John	Amonsta	3/22/90	Male	Caucasian	Hispanic	English	Houston	TX

The interface includes a top navigation bar with "apricot" and "Welcome: Results 9". Below it is a ribbon with tabs for File, Data, Insert, Analyze, Display, and Navigate. The "Analyze" tab is active, showing a filter icon and a formula bar containing "=NameOf([First])". On the right side, a "Table Cell" panel is open, showing sorting options for "Rows (2)". Two sorting options are visible: "Last Sort ascending" and "First Sort ascending", both with a sort icon. A purple box highlights these two options. Below the table, there is a "Add a sort" dropdown menu.

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.

Training Survey

Please complete the survey:



We value your feedback!

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.