Results Ordering & Sorting Data Webinar

Bonterra™

Meet Your Trainer

Andrew Vought

Training Specialist

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.

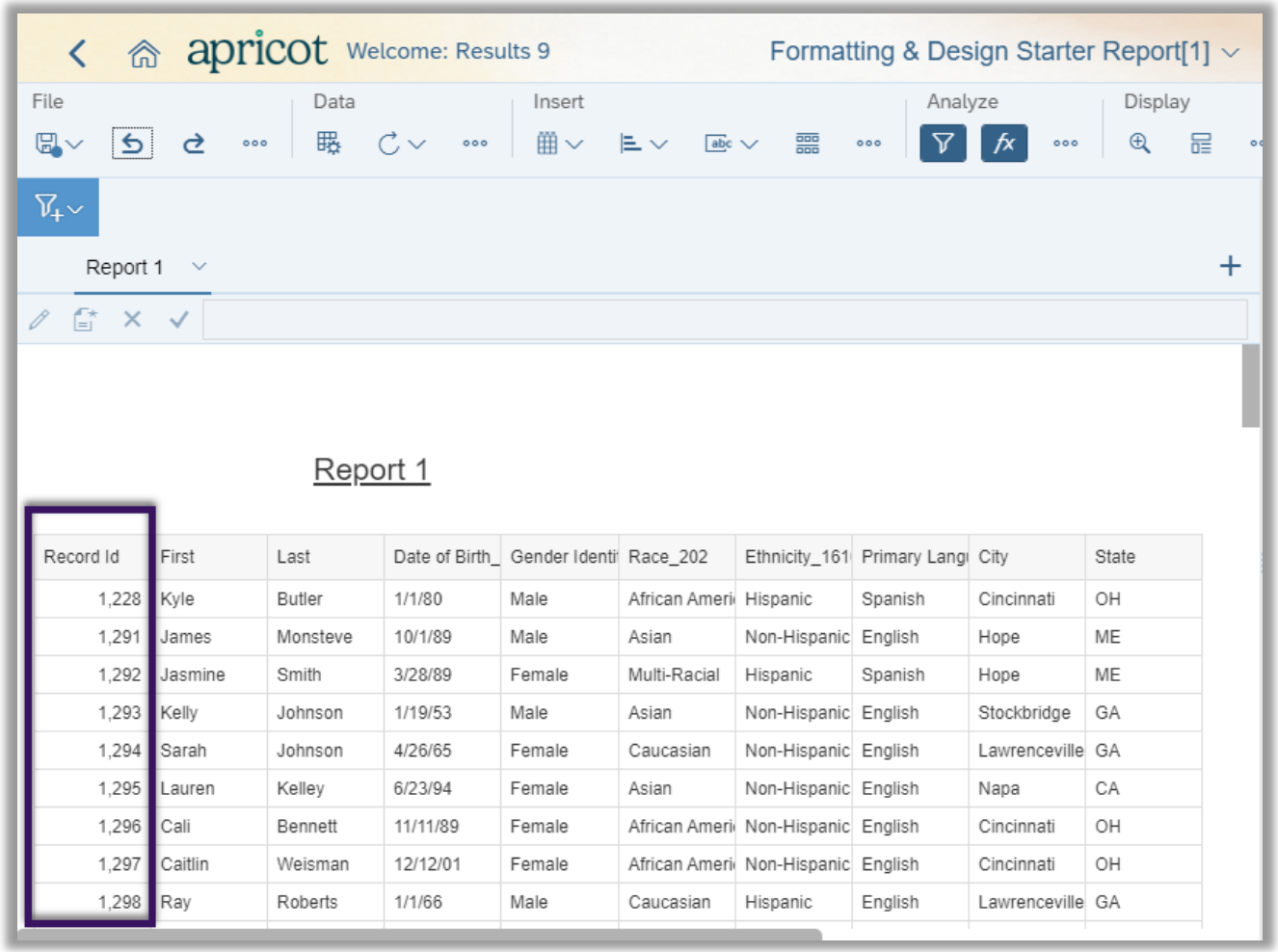
Agenda

- Default Ordering
- Sorting Tool
- Advanced Sorting

Default Ordering

Default Ordering

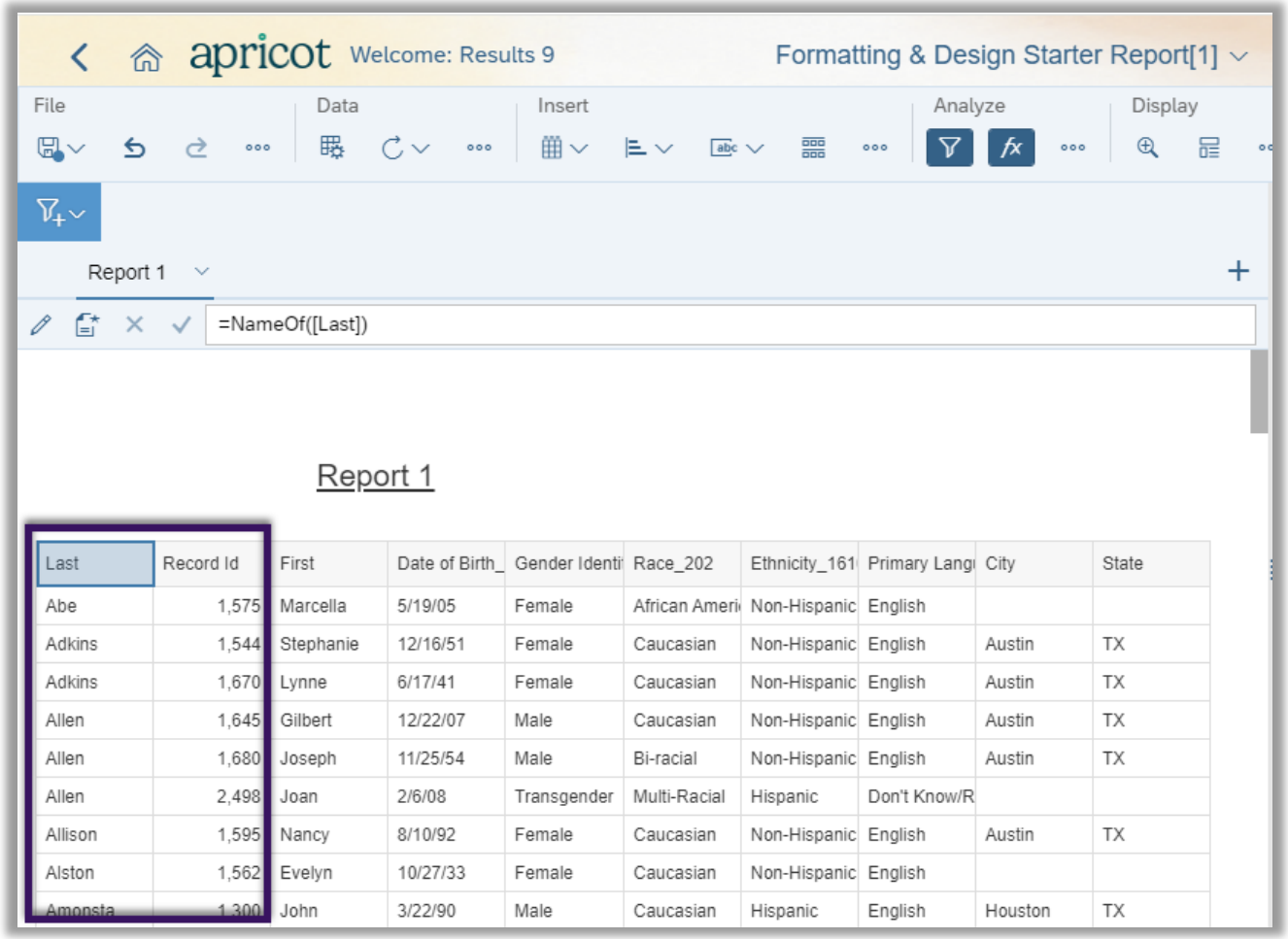
- Based on first column of table
- Ascending order



Record Id	First	Last	Date of Birth_	Gender Identi	Race_202	Ethnicity_161	Primary Langu	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

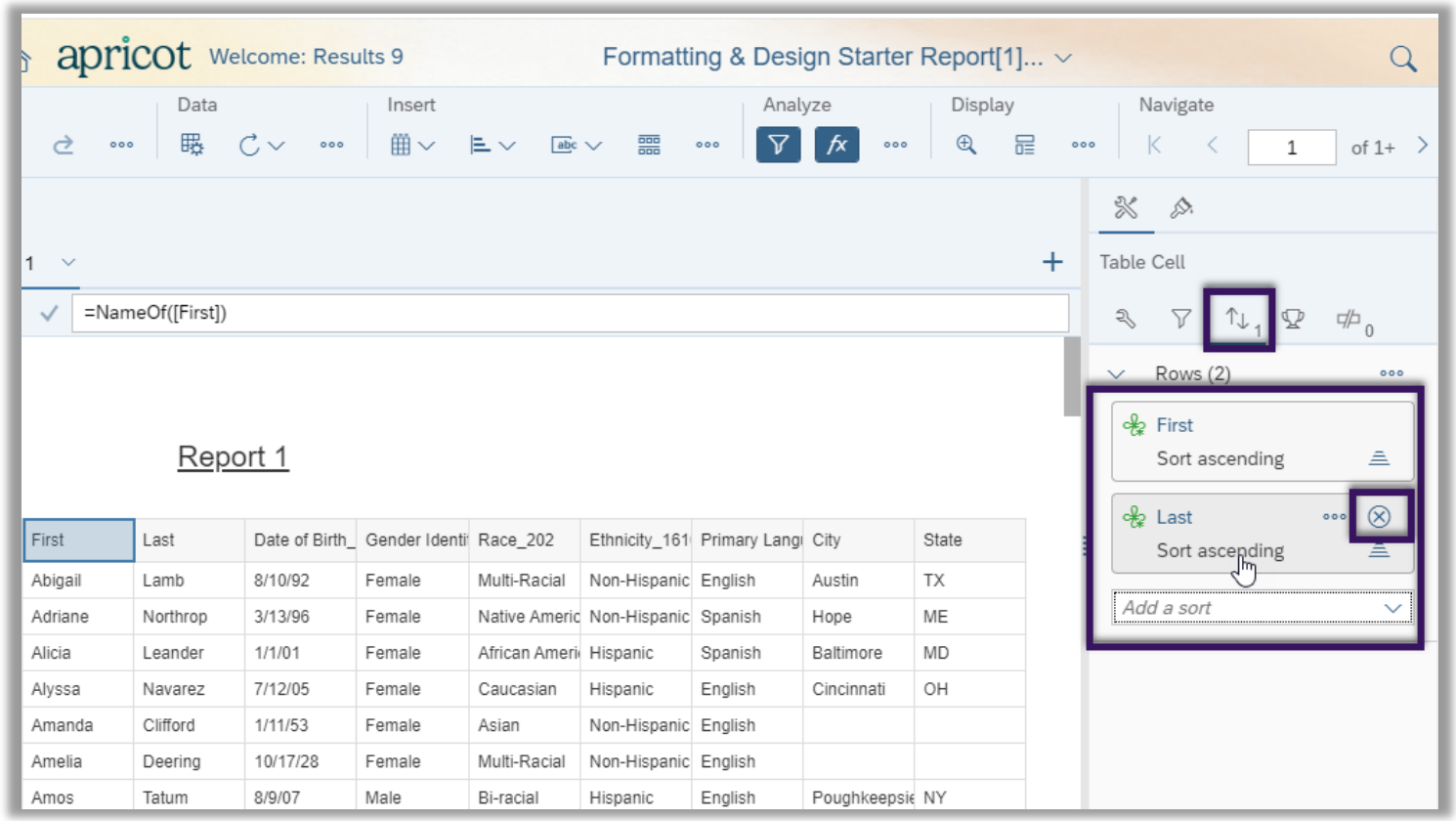
- Based on first column of table
- Ascending order
- Two ways to modify
  - Re – order columns
  - Use Sort Tool



Sorting Tool

Sorting Tool

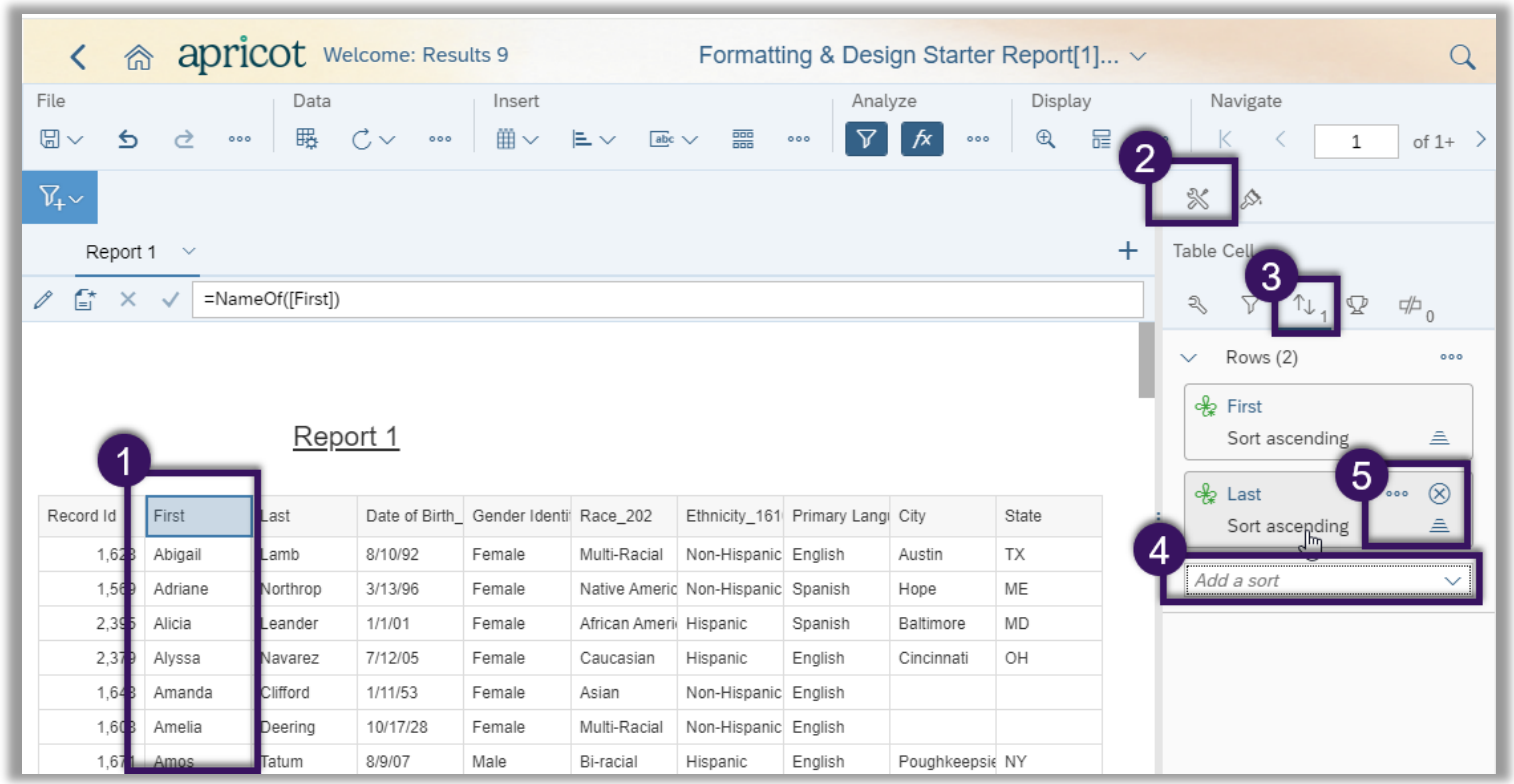
- Accessed under the Show Report Element Data
- Apply to single or multiple columns
- Can be removed if needed



Sorting Tool

Steps

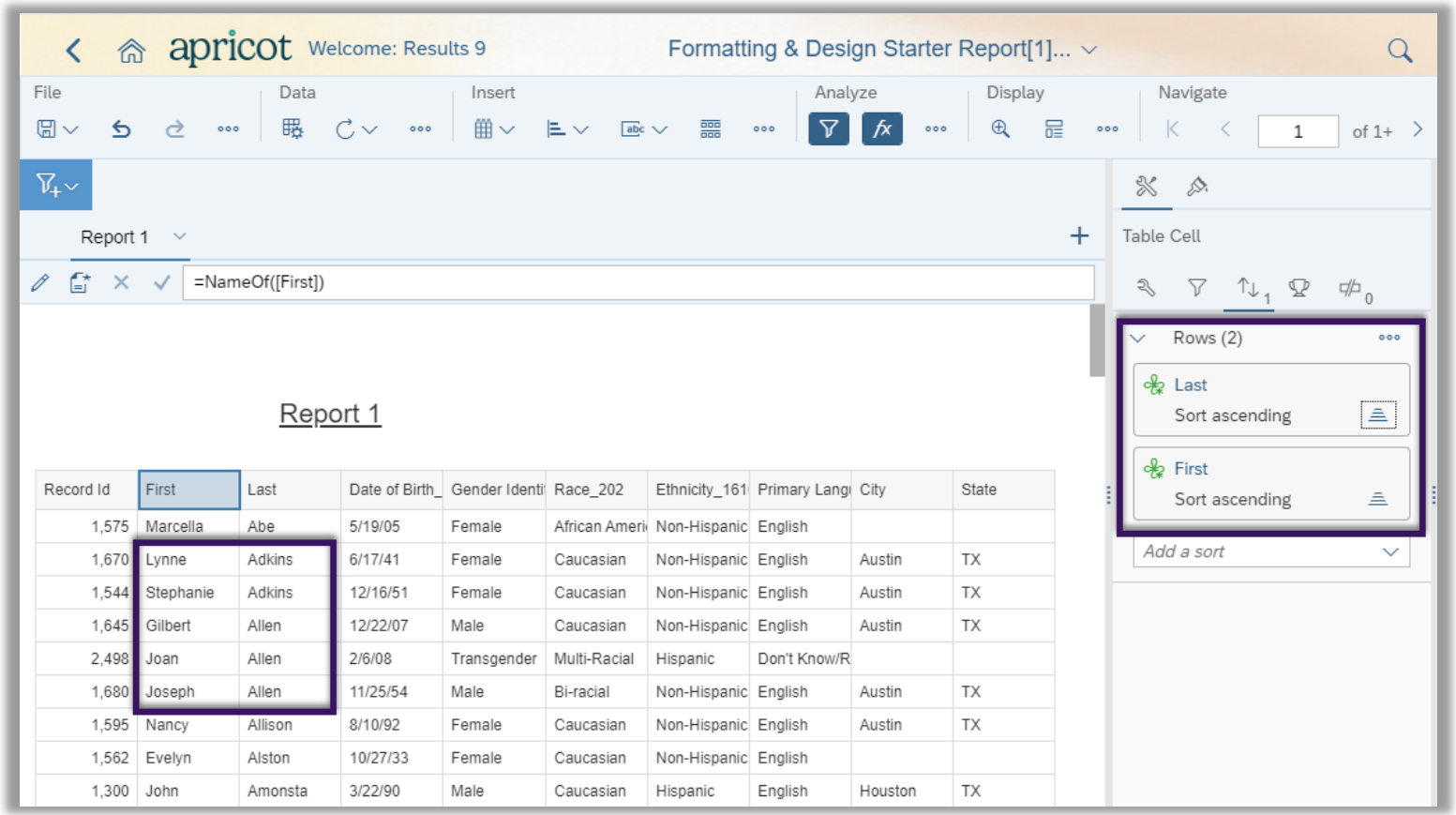
1. Click the Column or Table
2. Click the Wrench and Screwdriver Icon
3. Click the Up and Down Arrow Icon
4. Select desired column to sort by in drop down
5. Refine the Sort (optional)



Advanced Sorting

Advanced Sorting

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



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!

Bonterra

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.

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