

Results Query Filter Webinar

Meet Your Trainer

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Learning Objective

Help Report Writers understand best practices for using the query filter in results so that users feel confident when narrowing data sets within Results reports.

Agenda

Filtering Overview

Query Filter

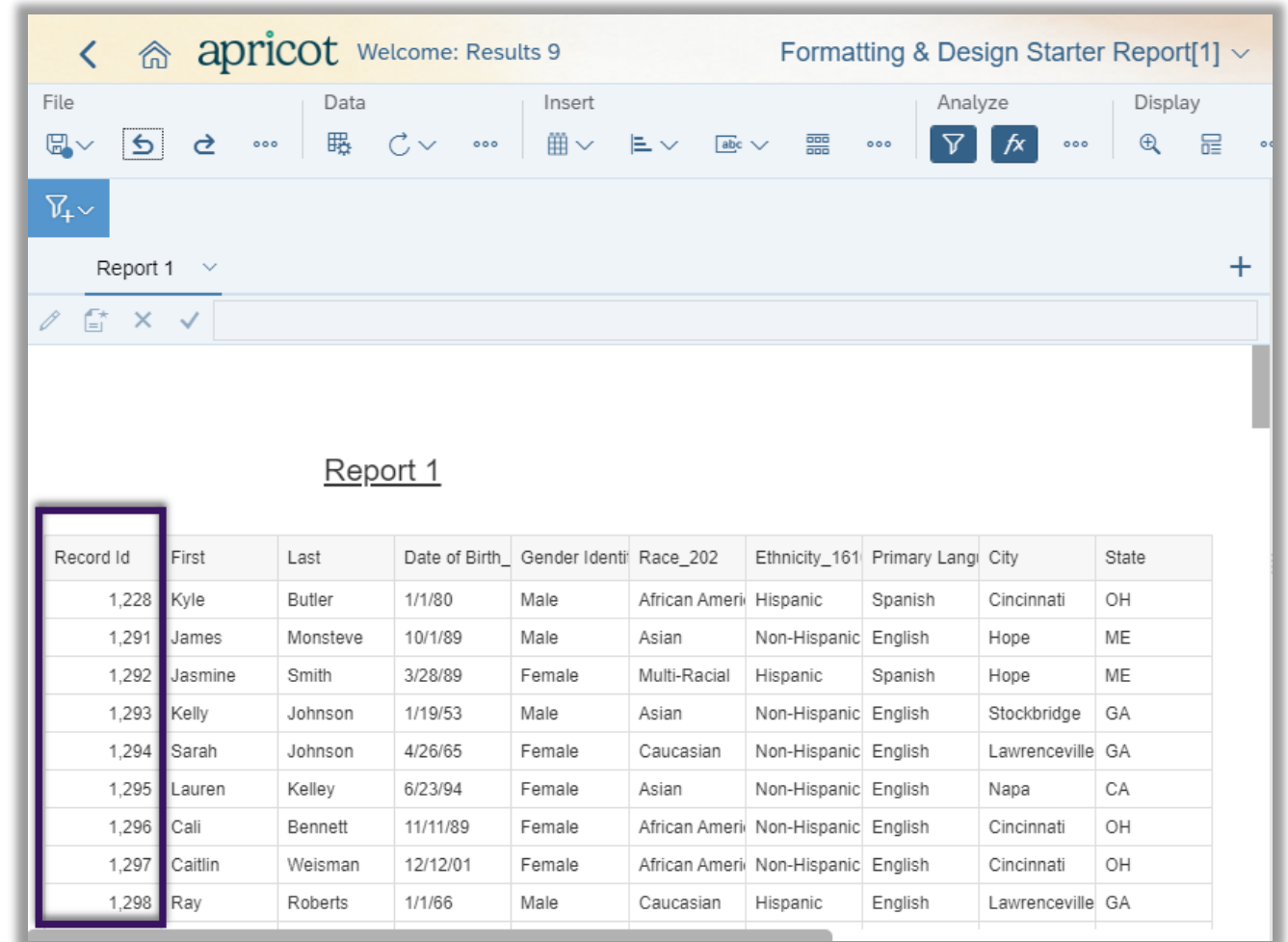
Advanced Query Filter

Filtering Overview

Filtering Overview

Three Key types

- Query Filter
- Report Filter
- Input Control



The screenshot shows the Apricot software interface. The top navigation bar includes the Apricot logo, a home icon, and the text 'Welcome: Results 9'. The main title is '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 (funnel) and a formula icon (fx). 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. The data rows are as follows:

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 American	Hispanic	Spanish	Cincinnati	OH
1,291	James	Monstev	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 American	Non-Hispanic	English	Cincinnati	OH
1,297	Caitlin	Weisman	12/12/01	Female	African American	Non-Hispanic	English	Cincinnati	OH
1,298	Ray	Roberts	1/1/66	Male	Caucasian	Hispanic	English	Lawrenceville	GA

Filtering Overview

Query Filter

- Applies to whole report
- Can be prompted

The screenshot displays the 'Query Panel' interface. On the left, a tree view shows a hierarchy of fields under the query 'apricot_101068 Participant Profile_2.unx'. The 'Client Status_96' field is selected. The 'Result Objects' section in the center shows a list of fields: Participant Name_2, Race_147, Monthly Income_282, Gender_8, Date of Birth_95, Client Status_96, and Employed_328. The 'Query Filters' section at the bottom, highlighted with a purple border, shows a filter for 'Client Status_96' with a dropdown menu set to 'In List' and a text input field containing 'Active'. The 'Data Preview' section at the bottom right has a search bar with the placeholder text 'Type a text to filter the values'. At the bottom of the panel, there are buttons for 'Run', 'Apply Changes and Close', and 'Cancel'.

Query Filter

Query Filter

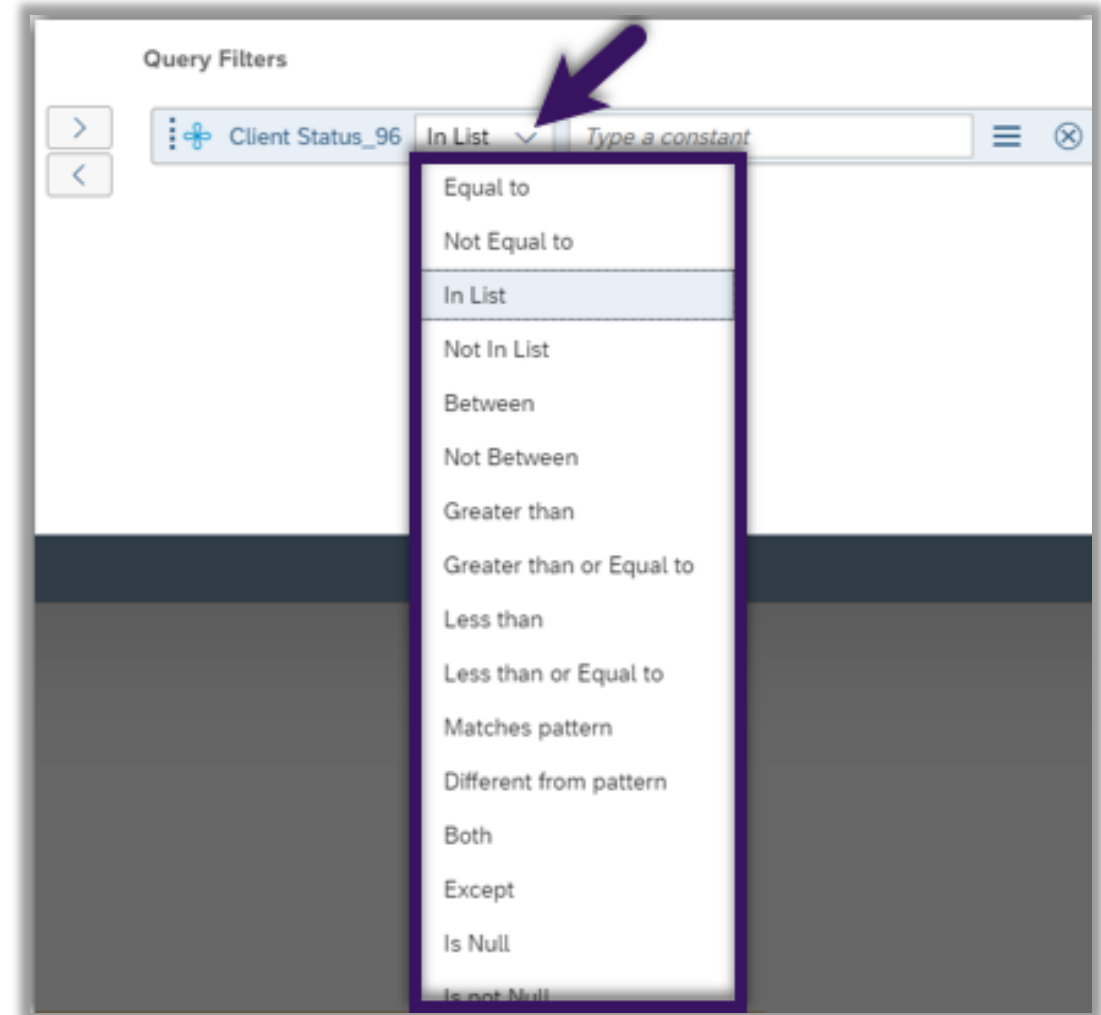
- Narrow data in report
- Optimize report speed
- First layer of filtering

The screenshot displays the 'Query Panel' interface. On the left, a tree view shows the data structure for 'apricot_101068 Participant Profile_2.unx'. The 'Client Status_96' field is selected. The 'Result Objects' section on the right lists various fields: Participant Name_2, Race_147, Monthly Income_282, Gender_8, Date of Birth_95, Client Status_96, and Employed_328. The 'Query Filters' section, highlighted with a purple border, shows a filter for 'Client Status_96' with a dropdown menu set to 'In List' and a text input field containing 'Active'. Below this is a 'Data Preview' section with a search bar for filtering values. At the bottom right, there are buttons for 'Run', 'Apply Changes and Close', and 'Cancel'.

Query Filter

Three Components

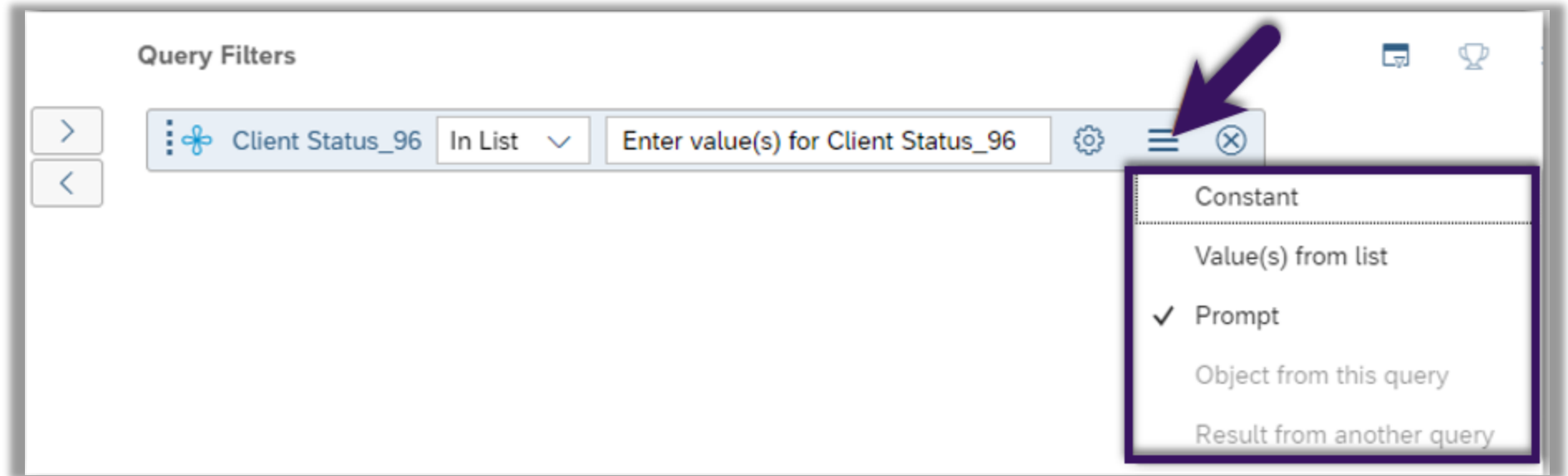
- Filter Function



Query Filter

Three Components

- Filter Function
- Filter Type



Query Filter

Three Components

- Filter Function
- Filter Type
- Prompt Properties

Prompt Properties

New prompt
 Parameter from universe

Prompt text:

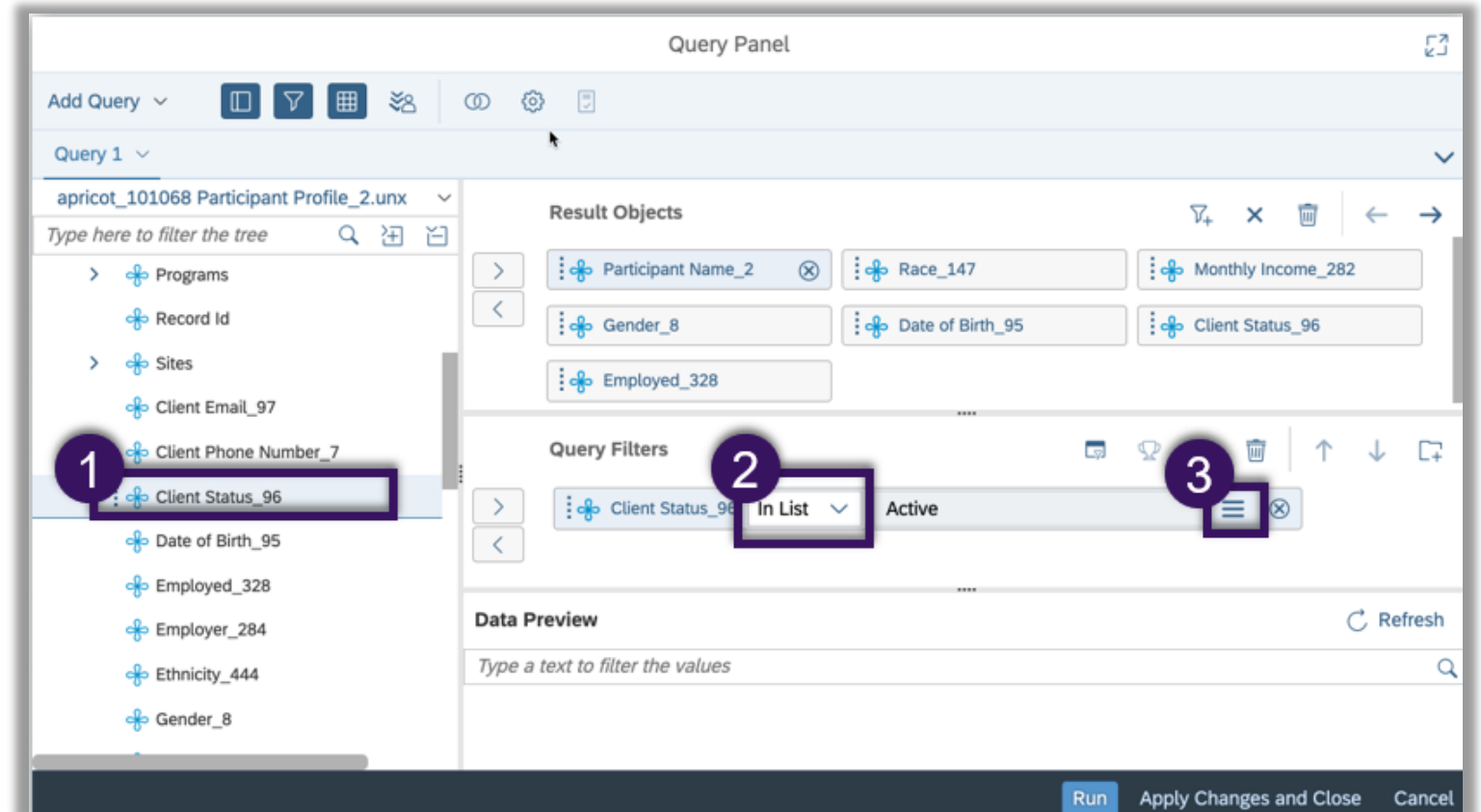
Prompt Properties

Prompt with List of Values Select only from list
 Keep last value(s) selected Optional prompt

Query Filter

Steps

1. Select desired data element(s)
2. Select filter function
3. Select filter type
4. Configure prompt properties (if applicable)

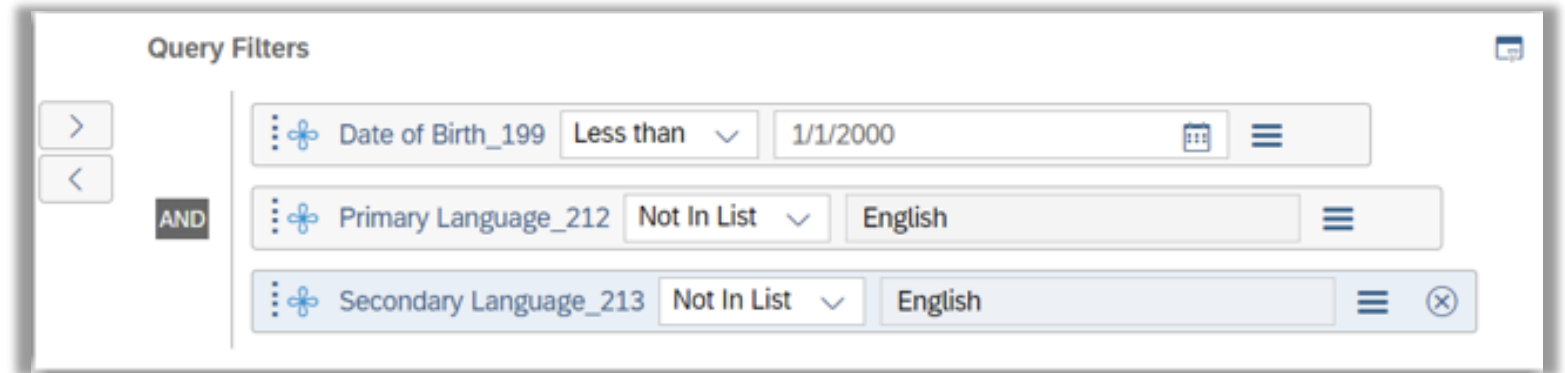


Advanced Query Filter Skills

Advanced Query Filter Skills

Three Types

- And / Or Condition
- Consolidate Prompts



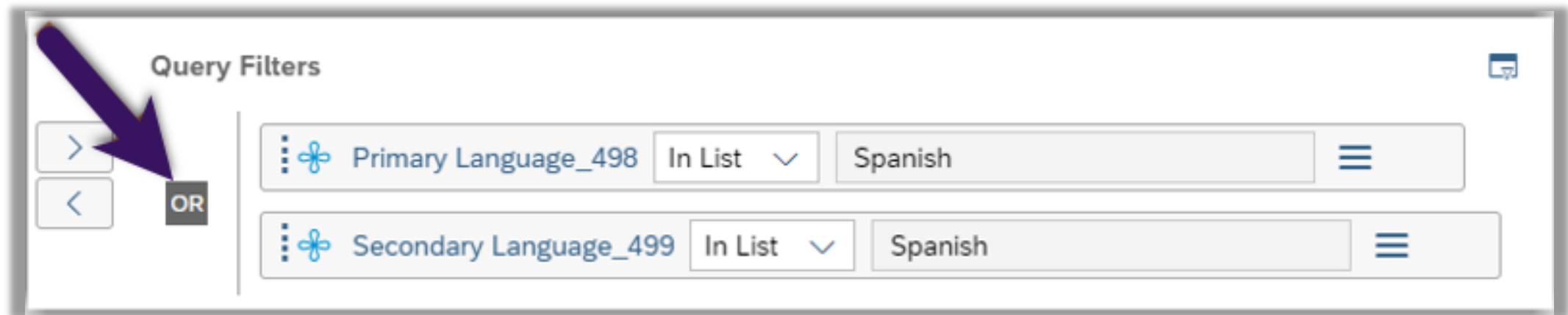
The screenshot displays a 'Query Filters' window with three filter conditions. The first condition is 'Date of Birth_199' with the operator 'Less than' and the value '1/1/2000'. The second condition is 'Primary Language_212' with the operator 'Not In List' and the value 'English'. The third condition is 'Secondary Language_213' with the operator 'Not In List' and the value 'English'. The conditions are connected by an 'AND' operator. Navigation arrows are visible on the left side of the window.

Field	Operator	Value
Date of Birth_199	Less than	1/1/2000
Primary Language_212	Not In List	English
Secondary Language_213	Not In List	English

Advanced Query Filter Skills

And / Or Condition

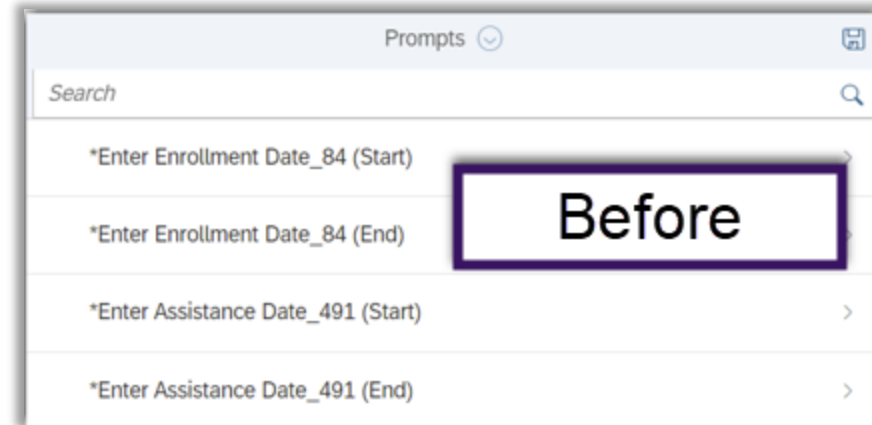
- Changed by double clicking text
- And returns exact match on **all** filters
- OR returns records that match any **one** or more of the filters



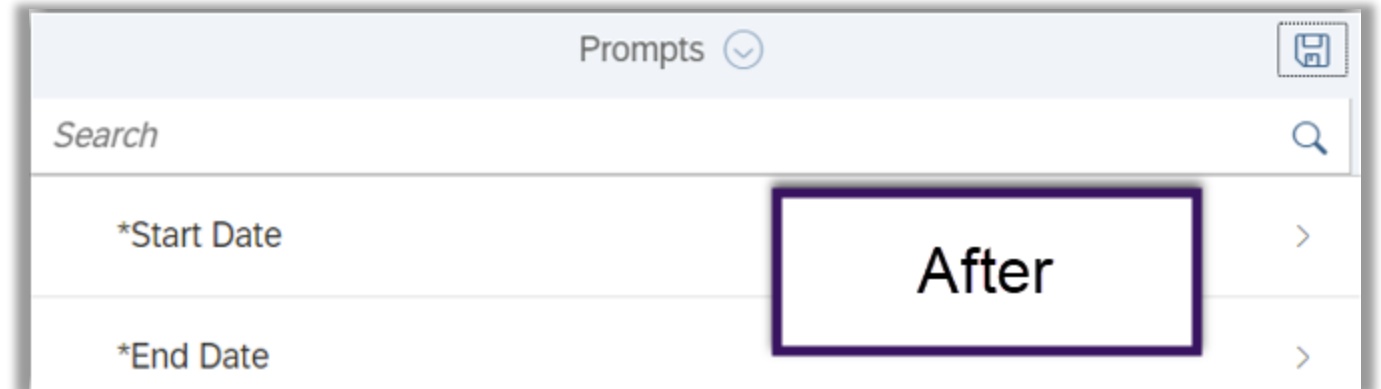
Advanced Query Filter Skills

Consolidating Prompts

- Reduces Prompts to be completed
- More User Friendly



A screenshot of a 'Prompts' dialog box. The title bar says 'Prompts' with a dropdown arrow and a save icon. Below the title bar is a search bar with the placeholder text 'Search' and a magnifying glass icon. The main area contains four prompts, each with a right-pointing arrow: '*Enter Enrollment Date_84 (Start)', '*Enter Enrollment Date_84 (End)', '*Enter Assistance Date_491 (Start)', and '*Enter Assistance Date_491 (End)'. A purple box labeled 'Before' is overlaid on the right side of the dialog, encompassing the first two prompts.



A screenshot of a 'Prompts' dialog box, similar to the one above. The title bar says 'Prompts' with a dropdown arrow and a save icon. Below the title bar is a search bar with the placeholder text 'Search' and a magnifying glass icon. The main area contains two prompts, each with a right-pointing arrow: '*Start Date' and '*End Date'. A purple box labeled 'After' is overlaid on the right side of the dialog, encompassing both prompts.

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.