Results Webinar Common Formulas



Meet Your Trainer

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Training Specialist



Learning Objective

Help Report Writers understand best practices for writing charts & graphs in results so that users feel confident when graphing data sets within Results reports.





Common Formulas Overview

Types of Formulas

Commonly Used Formulas



Common Formulas Overview



Parts of a Formula

The parts in **bolded green** below are the **data**:

=If ([Gender]) >="!" Then [Gender] Else "Not Answered"

The parts in **bolded blue** below are the **functions**: = **If (**[Gender]) >="!" **Then** [Gender] **Else** "Not Answered"

The part in **bolded red** below is an **operator**: =If ([Gender]) >="!" Then [Gender] Else "Not Answered"

The parts in bolded purple below is the syntax: =If ([Gender]) >="!" Then [Gender] Else "Not Answered"

Record Id	Participant Na	Date of Birth_	Gender_8	*Gender
801	Sean Morris	4/28/86		Unanswered
805	Michael Stedo	4/8/20		Unanswered
809	a c	1/1/00		Unanswered
409	Vicky Graysor	1/6/79	Female	Female
413	Jaquie Thomp	2/1/85	Female	Female
449	Lizette Willian	6/12/90	Female	Female
451	Lexie Garcia	12/13/75	Female	Female
453	Lara Crofton	2/5/78	Female	Female





Best Practice

Keep in mind:

Formatting, including spacing and character placement is vital to developing formulas that work accurately.

When copying and pasting formulas, be mindful that quotation marks are straight and not curly.

Essentially, if a formula that contains quotation marks does not work, try deleting and re-typing the quotes. This will often fix a formula that is otherwise written correctly.





Types of Formulas



Types of Formulas

- 1. Footer Calculations (we learned yesterday)
- 2. Type into Formula Bar
- 3. Use Formula Editor
- 4. Create Variables with Variable Editor

File Formula Image: Summary Image: Summary Summary Objects Summary Objects Type here to filter objects tree Type here to filter functions tree Image: Summary Image: Summary Image: Summary Image: Summa	く 命	Formula Editor			
Objects Functions Operators Type here to filter objects tree Type here to filter functions tree = < < > > = >= =<	File $\Box \sim 5$ $\nabla_{+} \sim$	Formula			
	Jose Jimenez 9 Kan Arg 4.0, Kanny 14.0, Kanny Black 1.2, Lonnie Mitche 10.0, Lonie Singer 3.5, Luig Ortes 9 Lui Ortz 1.5, Luite Hende 3.0, Marcur York 77 Mario Jones 8 Ortando Dent 3.5, Tom Grayson 5,0,0 Trey Singer 4.5, Willium Jones 7 William Jones 124	Objects Type here to filter objects tree Dimensions Client Status_96 Date of Birth_95 Date of Birth_95 Employed_328 Gender_8 Monthly Income_282 Participant Name_2 Race_147 	Functions Type here to filter functions tree > (a)All > (a)Aggregate > (a)DataProvider > (a)DateTime (a)Document (a)Misc	Operators = < <= <> >= . + - / * () Values Prompts : : After All And	for Results 14/21 v.1 1_user_1 21 6:17:07



Formula Bar

- A "window into a cell"
- Create a quick formula for format purposes, or to just use once in the report
- Click through the icons to:
 - Display a helpful editor
 - Turn the formula into a variable
 - Restore the old cell contents
 - Validate the formula



🜗 Bonterra.

Formula Editor

- Click the pencil icon on the left of the Formula
 Bar
- Select from available Objects, Functions, and Operators
- Does not include Name, Description, Type, or Qualification
- Formulas created here will not be saved as objects that can be used ongoing

Formula Editor					
Formula					
=Count([Record Id])		×			
Objects	Functions	Operators			
Type here to filter objects tree Q	Type here to filter functions tree	= < <= <> > >=			
✓ Dimensions	> [₇₂ All	. + - / * ()			
😽 Date of Birth_95	> [x] Aggregate	Values			
📌 Gender_8	> [x) Character	Prompts			
😚 Participant Name_2	> [x) DataProvider	:			
🔶 Primary Language_498	> [DateTime	;			
rest of the second sec	> [Document	After			
📌 Record Id	> [cx Logical	All			
> Variables	> [cit Misc	And			
	> [\vec{x} Numeric	Ascending			
	> [at Set	Before			
Record Id					

Cancel

ОК

Commonly Used Formulas



Commonly Used Formulas

Row Number

• To make locating and communicating about specific rows of data easier

=LineNumber()-1

Great option for the Formula Bar versus
 Variable Editor

1	1,228	Kyle	Butler	1/1/80	Spanish	
2	1,293	Kelly	Johnson	1/19/53	English	
3	1,296	Cali	Bennett	11/11/89	English	
4	1,299	Matt	Stevens	10/1/75	English	
5	1,300	John	Amonsta	3/22/90	English	
6	1,302	Sarah	Stevens	1/1/45	English	English
7	1,303	Wynn	Stevens	1/1/65	English	Spanish
8	1,490	Robert	Contreras	10/21/11	Spanish	English
9	1,491	James	Cheney	3/23/00	English	
10	1,492	Joe	Pickard	9/4/68	English	
11	1,493	Carol	Stansberry	9/8/55	English	
12	1,494	Gloria	Rosario	7/14/02	English	Spanish
13	1,495	Kristi	Hines	10/31/65	English	
14	1,496	John	Dubuque	9/6/30	English	



Additional Resources





We value your feedback!

Please complete our survey (scan the QR code or click the link in chat). Thank you!





Additional Training Opportunities

- Knowledge Base Articles Search in Chat
- On-demand Videos in our <u>Bonterra Academy</u>
- 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.



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Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email: <u>apricot@bonterratech.com</u>



- 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.

