

# Results Webinar Flags

# Meet Your Trainer

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# Learning Objective

Help Report Writers to understand best practices for creating flags in Results, ensuring users feel confident when utilizing flags in their reports.

# Agenda

Flags Overview

Completion Flags

Common Flag  
Examples

# Flags Overview

# Flags Overview

## Consider Commonly Counted Data Points

Assign a value of “Yes” or 1 to data that matches certain criteria captured in Forms (TouchPoints in ETO), Program Enrollment, and other parts of your software. Examples include:

- Funder Source
- Service Types
- Goal Completion
- Absent, Tardy, Present values
- Dates: Within Forms/TouchPoints, Program Enrollment, Program Dismissal
- Missing/Null data

# Use Cases: Common Formula Purposes

If Then - to assign a value to an object, if-then logic is used

Here's the typical structure of a flag variable:

***=(If [Object] fits defined parameter here Then "Yes") In (contextual ID here)***

***=(If [Attendance] = "Present" then "Yes") in ([Record ID])***

# Completion Flags



# Completion Flags

## Completion Flags using the **If** Function

Completion flags are used to see if forms in Apricot/ETO have been taken (recorded.)

To create a basic completion flag, use the following formula layout:

=(If [Record ID xyz] > 0 Then "Yes") In ([Tier 1 Record ID abc])

We will break down the formula in the next slide...

# Completion Flags

=(If [Record ID xyz] > 0 Then "Yes") In ([Tier 1 Record ID abc])

- The **If** condition includes the Record ID for the Form we are analyzing.
- The condition on the Record ID\_xyz is that it must be greater than zero.
- All Records IDs are > 0, therefore, this translates to, “If the Record ID exists...”
- If the response exists, the Value will always be "Yes"

We will break down the last part of the formula in the next slide...

# Flags Starter Report

There are 2 tables in your starter report tab. The table on the left includes “Goals” form responses, and the table on the right includes “Services” responses. In Hands-on #2 we are going to build variables that tell us if a participant has at least 1 response to one or both of these forms.

## Goals and Services

Participant Pr	First	Last	Goals_87. Record Id	Goal Category_1815	Goal_1812	Goal Status_1816	Start Date_1811	Target Date_1814
1,228	Kyle	Butler	1,231	Food	Research Schoo	In progress	7/20/17	8/1/17
1,228	Kyle	Butler	1,232	Legal	Apply to Schools	In progress	7/20/17	9/1/17
1,228	Kyle	Butler	2,555	Employment		Complete	6/15/19	8/1/19
1,293	Kelly	Johnson						
1,296	Cali	Bennett						
1,299	Matt	Stevens						
1,300	John	Amonsta						
1,302	Sarah	Stevens						
1,303	Wynn	Stevens						
1,490	Robbie	Contreras						

Participant Pr	First	Last	Services_62. Record Id	Date of Service_1204	Goal(s) discussed_1845
1,228	Kyle	Butler	1,233	10/20/17	1,231
1,228	Kyle	Butler	2,334	12/18/17	
1,228	Kyle	Butler	2,645	1/17/17	
1,228	Kyle	Butler	2,646	4/17/17	
1,228	Kyle	Butler	2,647	9/17/17	
1,293	Kelly	Johnson	2,341	12/16/17	
1,296	Cali	Bennett	2,336	12/12/17	
1,299	Matt	Stevens	2,348	9/5/17	
1,300	John	Amonsta	2,338	12/16/17	
1,302	Sarah	Stevens	2,343	12/20/17	

# Common Flag Examples

# Common Flag Examples (Value Flags)

## Value Flags using the **If** Function and **=** Operator

Value flags are used to highlight specified Values. For example, if we want to flag all Participants who responded to the question “Source of Income?” with “Social Security”

To create a basic value flag, use the following formula layout:

=(If [Question ID xyz] =“ABC” Then 1) In ([Tier 1 Record Id abc])

Using the example above:

=(If [Source of Income?] =“Social Security” Then 1) In ([Tier 1 Record Id abc])

...We will break down the formula in the next slide.

# Common Flag Examples (Date Flags)

## Date Flags using the **If** Function and **Between** Operator

Date flags are used to highlight Forms completed between two dates. For example, if we want to flag all Participants who completed a Form/TouchPoint in a specific quarter, month, or year, we can use the following formula layout:

=(If [Date Taken] **Between** ('First Date in Range' ; 'Last Date in Range') Then "Period Name") **In** ([Record ID])

Example of a formula that flags all Forms completed in the calendar year 2020:

=(If [Date Taken] **Between** ('1/1/2020';'12/31/2020') Then "2020") **In** ([Tier 1 Record Id abc])

# 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.