

When to Use Results Reporting

Comparison of Apricot Reporting Options

Welcome, we will start shortly!

Meet Your Trainer

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Learning Objective

By the end of this session, our goal is to help you understand the benefits of Results Reporting so you can decide when to use this more robust tool.

Agenda

Intro to Results

Reporting Comparison

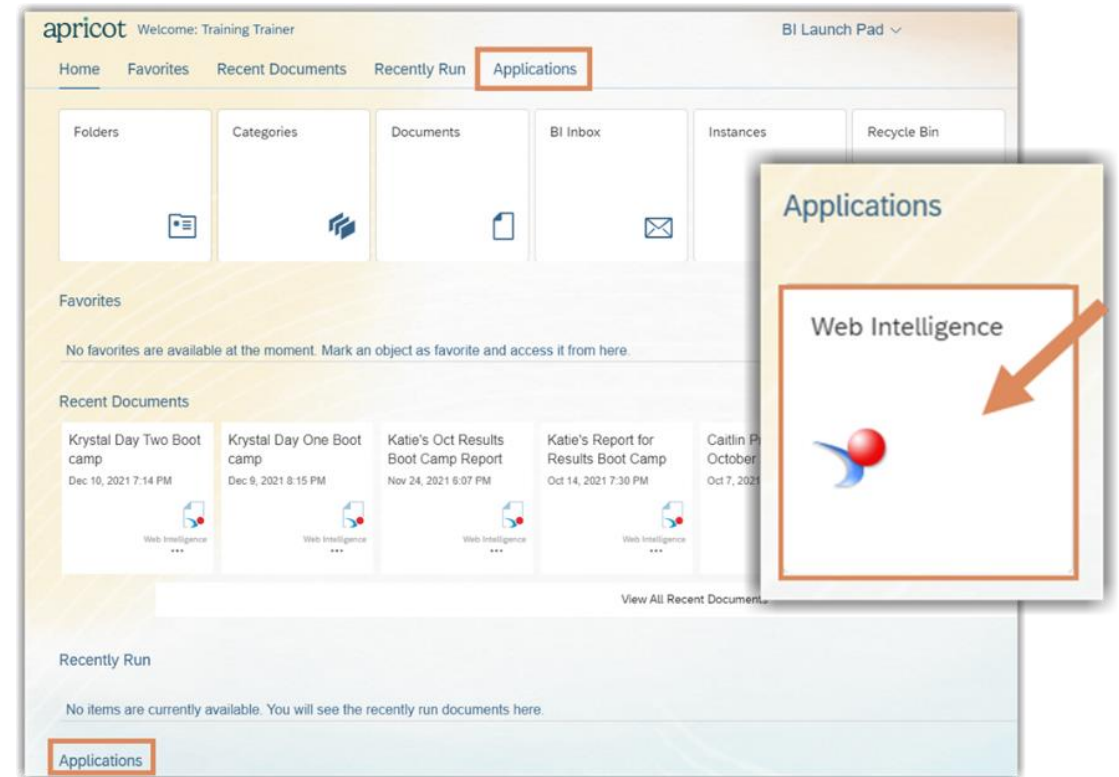
Results Reporting Strengths

Native Reporting Strengths

Intro to Results

Apricot Results Reporting

- Robust reporting tool available in Apricot Enterprise (360).
- Utilizes product developed by SAP Business Objects called Web Intelligence (WebI for short).
- Accessible only to Admins, but lots of sharing options.
- Can work with Flattened & Unflattened data.
- Customize formatting, variables, formulas & more.



Apricot Results Reporting

The screenshot displays the Apricot software interface. The main window shows a report titled "Report 1" with a data table. The table has the following columns: Record Id, Participant Name, Gender_8, Ethnicity_444, Race_147, and Date of Birth. The data rows are as follows:

Record Id	Participant Name	Gender_8	Ethnicity_444	Race_147	Date of Birth
33	Lonnie Singer	Male	Hispanic	Native Hawaii	10/1/78
34	April Billingsle	Female	Non-Hispanic	Asian	4/15/82
35	Asher Billings	Male	Hispanic	White or Cauc	6/9/84
36	Sarah Greene	Female	Non-Hispanic	Black or Afric	12/23/87
37	Beth Crane	Female	Non-Hispanic	White or Cauc	6/4/74
38	Jacob Smithe	Male	Non-Hispanic	Black or Afric	3/24/82
239	Alvy Singer	Male	Hispanic	Multi-Racial	10/1/78
408	Tom Grayson	Male	Non-Hispanic	White or Cauc	6/9/77
409	Vicky Grayson	Female	Non-Hispanic	White or Cauc	1/6/79
410	Trey Singer	Male	Hispanic	White or Cauc	5/17/81
412	Ellery Thomp	Male	Non-Hispanic	Black or Afric	11/5/85
413	Jaquie Thomp	Female	Hispanic	White or Cauc	2/1/85
448	Andrew Jones	Male	Non-Hispanic	Asian	5/16/85

The interface also shows a sidebar on the right with a "Dimensions" section containing the following items:

- Date of Birth_95
- Ethnicity_444
- Gender_8
- Participant Name_2
- Race_147
- Record Id

The top navigation bar includes the Apricot logo, the user name "Welcome: Katie Hange", and the "Web Intelligence" menu. The bottom of the report window has buttons for "Instant...", "Apply", and "Cancel".

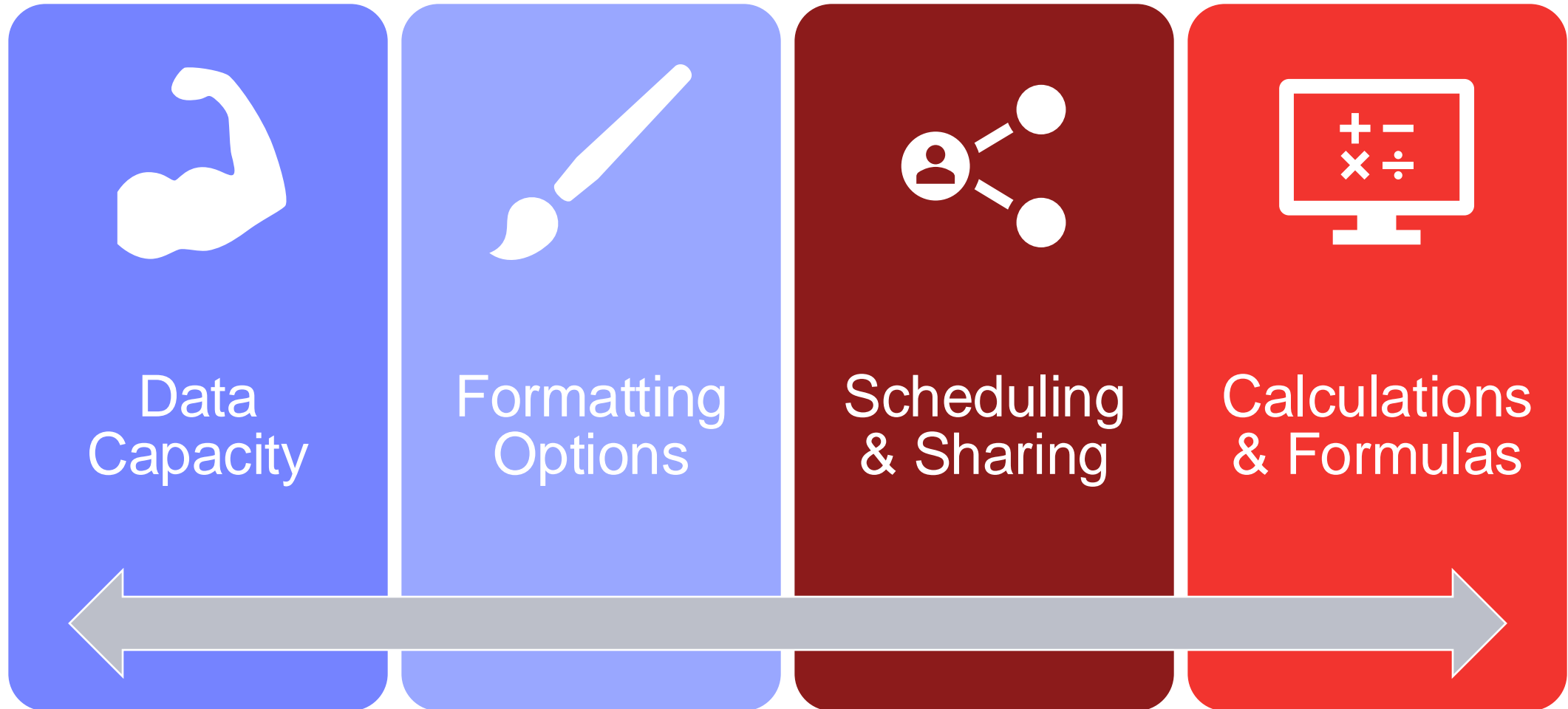
Reporting Comparison

Apricot Reporting Options

	Native Reporting	Results Reporting
Availability	All Versions	Apricot Enterprise (360)
User Access	Admins & Advanced Access (Editing) All Users (Viewing)	Admins Only (Editing & Viewing)
Data Access	All Data	Must Enable by Form
Saving	Auto-Save	Must Actively Save
Formatting	Minimal	Highly Customizable
Calculations & Summaries	Basic	Complex Formulas & Variables
Graphing	Basic	Advanced

Results Reporting Strengths

Results Reporting Strengths



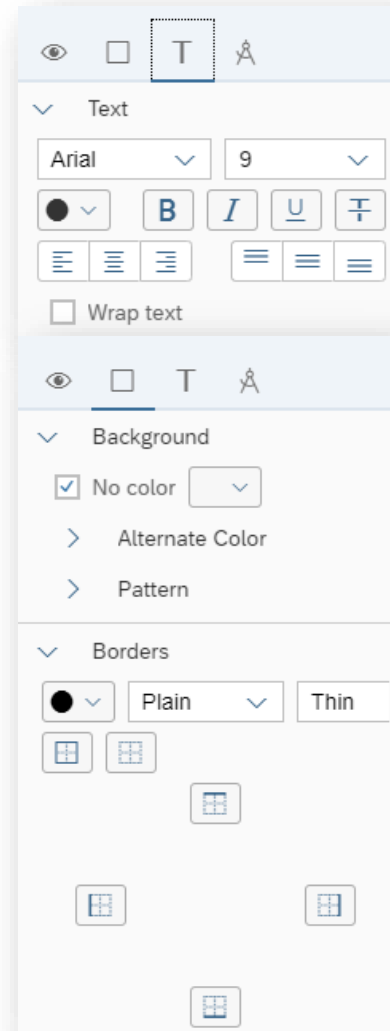
Data Capacity

- High Volume of Source Data
- Pulling from Multiple Forms



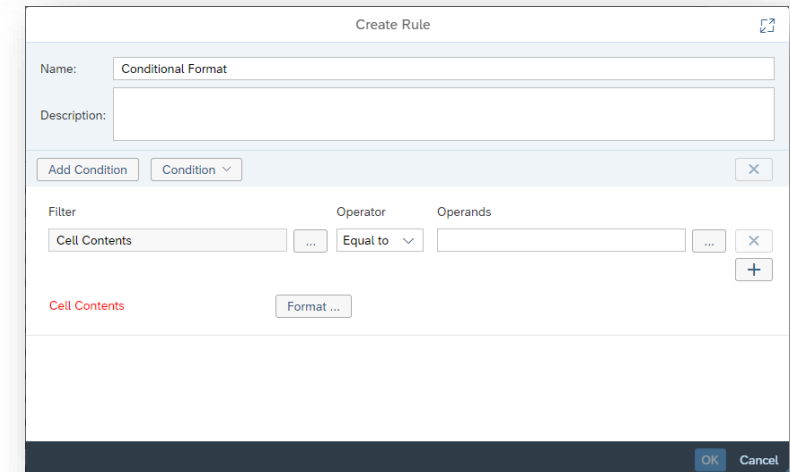
Formatting Options

- Adding Logo / Branding
- Text & Cell Formatting
- Data Display Options
- Custom Sorting
- Conditional Formatting



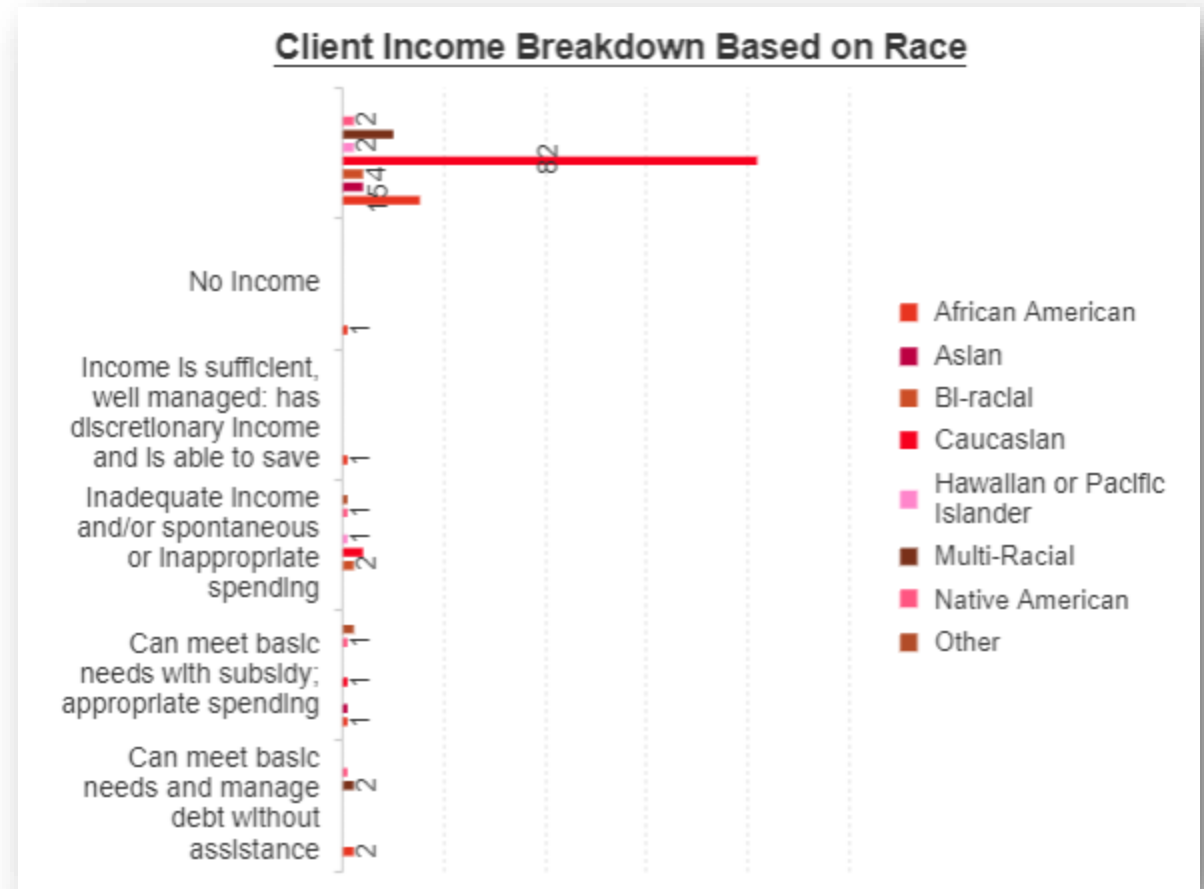
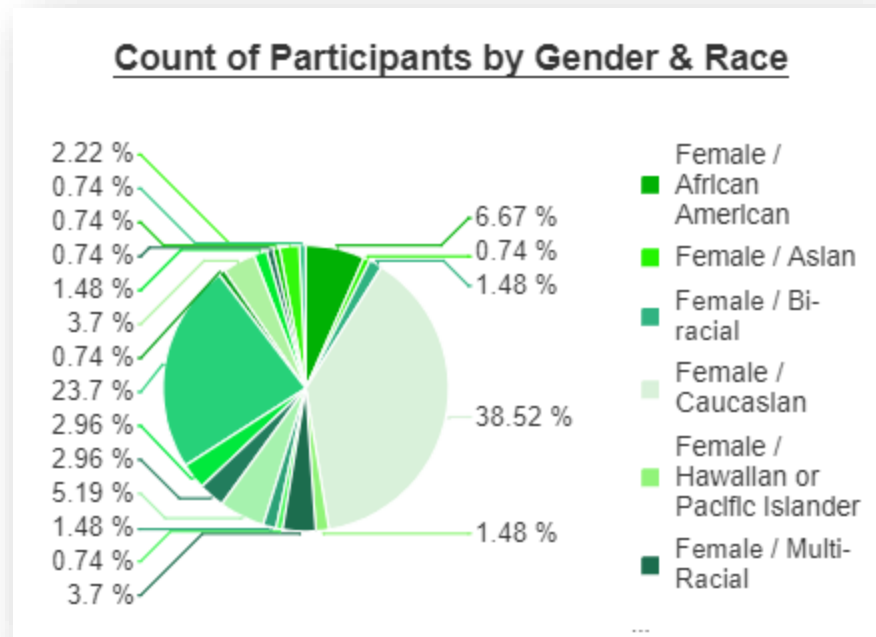
A screenshot of the 'Format Display' dialog box. It shows a table with various data types and their corresponding display formats. The 'Date/Time' row is highlighted, showing the format 'September 21, 2004'. The dialog also includes an 'Add Custom Format' button and 'OK', 'Apply', and 'Cancel' buttons at the bottom.

Default	Date/Time	+ Add Custom Format
Number	9/21/2004 8:45:30 PM	
Currency	Tuesday, September 21, 2004	
Date/Time	September 21, 2004	
Boolean	Sep 21, 2004	
Percentage	9/21/04	
Custom	8:45:30 PM	
	8:45 PM	
	Sep 21, 2004 8:45:30 PM	
	9/21/04 8:45 PM	



Formatting Options

- Advanced Graphing



Scheduling & Sharing

- Schedule to Send to Non-Admins
- Print Layout Formatting for Export
- Export Portions of Reports

The screenshot shows an email configuration window with the following sections:

- Delivery Details:** Includes checkboxes for "Keep instance in history" (checked) and "Use default settings" (unchecked).
- System Details:** Includes fields for "From:" (noreply@socialsolutions.com), "To:", "Cc:", "Bcc:", "Reply To:", "Subject:", and "Message:" (with a rich text editor toolbar).

The image displays two overlapping screenshots of report configuration menus. The top screenshot shows a menu with three numbered callouts: 1 (top toolbar), 2 (font icon), and 3 (Page Break section). The bottom screenshot shows a detailed configuration panel for "Report 1" with the following settings:

- Quick Display Mode:** Rows: 100, Columns: 20.
- Print Layout:** Size: A4, Orientation: Portrait.
- Margins:** Top: 0.79 inches, Bottom: 0.79 inches, Left: 0.79 inches, Right: 0.79 inches.
- Scaling:** Adjust to: 100%, Fit to: Auto (Page(s) wide), Auto (Page(s) tall).

Calculations & Formulas

- Counts & Aggregation
- Summary Tables & Cross-Tabs
- Variables as New Data Points

Record Id	Participant Name_2	Date of Birth_	Gender	Race_147	Primary Lang
408	Tom Grayson			White or Cau	English
409	Vicky Grayson			White or Cau	English
451	Lexie Garcia			White or Cau	English
453	Lara Crofton			White or Cau	English
461	Cherise Alexande			Black or Africa	English
462	Orlando Denton			White or Cau	English
623	Ashton Carter			Black or Africa	English
811	Ashton Carter			Multi-Racial	English
Count:					

Footer Calculation >

- Count
- Min
- Max
- Sum
- Average

Edit Variable

Qualification: Measure

Type: Number

OK Cancel

	Female	Male
African American	7	9
Asian	4	3
Bi-racial	2	5
Caucasian	81	74
Hawaiian or Pacific Islander	3	1
Multi-Racial	4	8
Native American	1	2
Other	2	

Objects

Type here to filter objects tree

- Query 1
 - Date of Birth_199
 - Ethnicity_1616
 - Gender Identity_200
 - Name_198
 - Primary Language_212
 - Race_202
 - Record Id

Functions

Type here to filter functions tree

- All
- Aggregate
- Character
- DataProvider
- DateTime
- Document
- Logical
- Misc

Operators

= < <= <> > >= . +

- / * ()

Values...

Prompts...

:

:

After

All

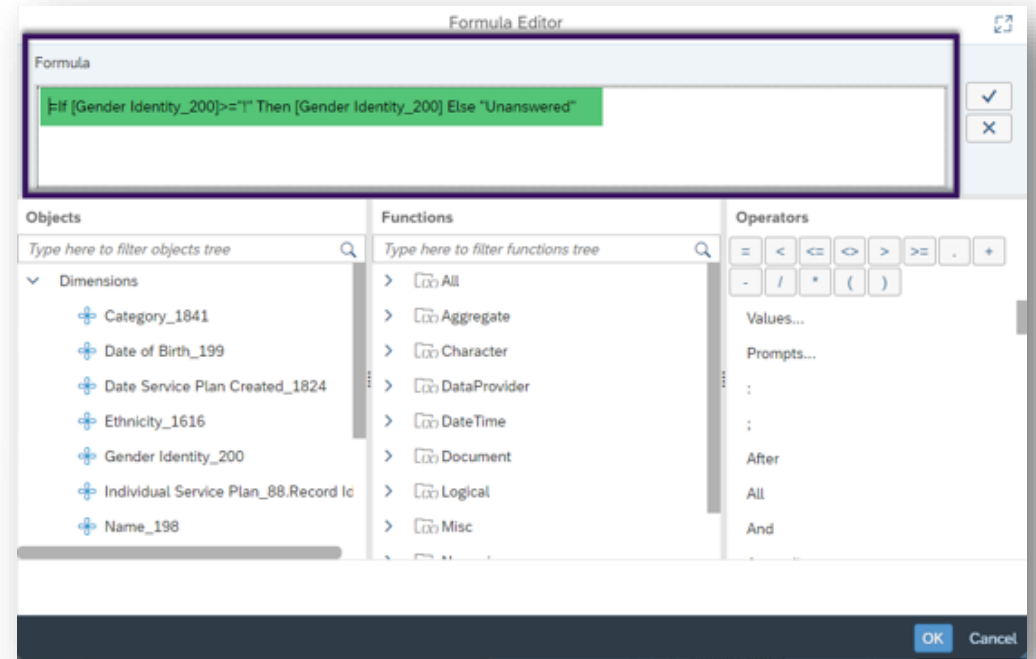
And

OK Cancel

Calculations & Formulas

- Formulas to Transform & Analyze Data
- Popular Examples:
 - Filling in Empty / Unanswered Cells
 - Separating Multiselect Data
 - Set Date Field for First or Last Limit
 - Converting Times & Dates

Secondary Language_213	Secondary Language
	Unanswered
	Unanswered
	Unanswered
	Unanswered
	Unanswered
English	English
Spanish	Spanish
English	English



Count	Secondary Language
7	English
2	Spanish
197	Unanswered

Native Reporting Strengths

Native Reporting Strengths



Quicker to
Learn &
Implement



User Access
Less Limited



All Data
Automatically
Available



Handles
Some Form
Relationships
Better



Additional Resources

Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)
- [Bonterra Academy](#) – Free Webinars & Recordings
- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics
- [Admin Labs](#) – 2 Hour Live Trainings on Specific Capabilities
- [Private Training](#) – 1:1 Sessions with Training Expert in Your Apricot (End User & Admin Topics Available)

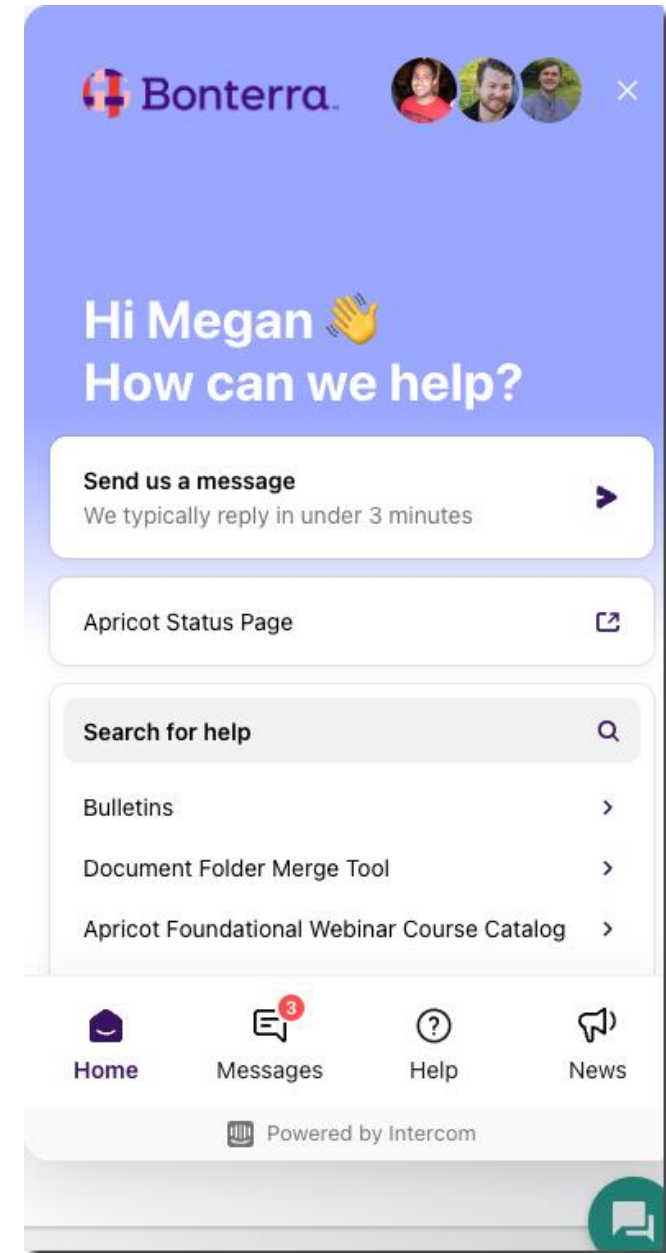


Build confidence & knowledge in
our software!

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.