

# Using Limits in Reporting

Apricot Targeted Webinar

# Meet Your Trainer

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# Learning Objective

This training will cover:

- Adding Limits
- Use Cases

By the end of this session, the goal is for you to understand how to effectively add and manipulate limits within your Apricot reports.

# Agenda

Adding Limits

Key Consideration

# Adding Limits

# Adding a Limit

- Limits further narrow down results by limiting the records pulled into the report
  - First Created
  - Last Created

The screenshot displays the 'Program Enrollment Form Properties' dialog box. The 'Limit' section is highlighted with a red box, showing the following options:

- None
- Last Created
- First Created

Below the 'Limit' section, the text reads: 'Only the first created Program Enrollment record for each Participant will be included'.

The background shows the 'Program Enrollment' sidebar with the following sections:

- Forms
  - Participant (Always)
  - Program Enrollment (Always)
- Filters
- Group Filters
- Limit Sections
  - Program Enrollment (Program Enrollment)
  - Start Date This Month

A red circle with the number '1' is positioned next to 'Program Enrollment (Always)' in the sidebar.

# Limited Results & Limit Section

Once a limit has been added:

- Your report will show the results based on the limits you added and,
- A limit section appears with the option to “Show”

The screenshot displays a software interface for 'Program Enrollment'. The main header is 'Program Enrollment' with a dropdown arrow and a gear icon. Below the header, there are several sections: 'Forms' (containing 'Participant (Always)' and 'Program Enrollment (Always)'), 'Filters' (with a plus sign), 'Group Filters' (with a plus sign), and 'Limit Sections'. The 'Limit Sections' section is highlighted with a red border and contains one entry: 'Program Enrollment (Program Enrollment) [First Created]' with a green 'Show' button next to it.

# Data Comparison

**Program Enrollment** ▾

▼ Forms  
Participant  
Program Enrollment

▼ Filters +  
Start Date This Month

▼ Limit Sections  
Program Enrollment (Program Enrollment) [First Created] Show  
Start Date This Month

Report last run May 28th 2024, 3:47 pm  
[Click to refresh data](#)

	Percent of Total	Row Count
▶ Counselling	40%	2
▶ Workforce Development	20%	1
▶ Youth Services	40%	2

Total Rows  
**5**

**Program Enrollment (Program Enrollment)** ▾ **Limit Section [First Created]**

▼ Forms  
Participant  
Program Enrollment

▼ Filters +  
Start Date This Month

▼ Limit Sections

Report last run May 28th 2024, 3:47 pm  
[Click to refresh data](#)

▶ Leo Dodds (2544)	Row Count <b>1</b>
▶ Leo Morales (2586)	Row Count <b>1</b>
▶ Molly Walker (2564)	Row Count <b>2</b>
▶ Rashida Tray (2577)	Row Count <b>2</b>
▶ Sammy Costello (2603)	Row Count <b>1</b>

Total Rows  
**7**



# Key Consideration

# First vs. Last **CREATED**

The limit that you can apply to a form is either the first created or the last created record. If you use:

- Import
- Batch record creation

to add records in bulk, your created date may not reflect the actual date of service on the form.

The date the record was **CREATED** is what the limit applies to, **NOT** the date listed on the form.



# 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)

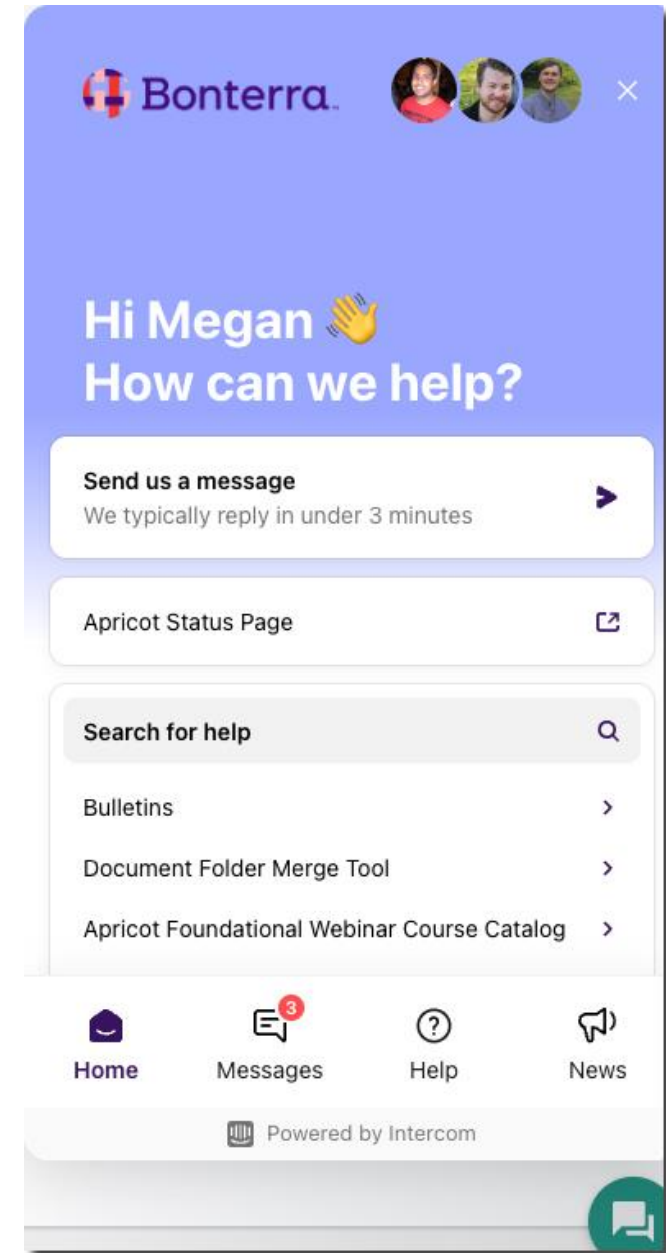


Build confidence & knowledge in  
our software!

# 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](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.