

Adding Filters to Limits

Apricot Targeted Webinar

Meet Your Trainer

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Learning Objective

This training will cover:

- Adding Filters to Limited Data
- Adding Filters to All Data

By the end of this session, the goal is for you to understand how to effectively add filters to your limited data.

Agenda

Adding Filters

Filtering Limited Data

Filtering All Data

Adding Filters with Limits

Adding Filters

There are two ways to add a filter to a limit and your results will differ based on how you add it:

1. Add a filter to the main section alongside your limit
2. Add a filter to the limited section

Filter Properties ✕

Rule

--Select a Filter-- ▼

* indicates fields that are already included in this section

Options

Inverse

Locked

Hidden

Global

Comparison

Delete Apply

Adding a Filter to Limited Data

When you add a filter to the main section of your report, you are layering that filter on top of the limited data.

The results will pull solely from the limited data subset.

Filters can be:

- Date range
- Program Enrolled
- Site enrolled
- Etc.

The screenshot shows a software interface for managing reports. The main window is titled "Program Enrollment" and has a sidebar with navigation options: "Forms", "Filters", "Group Filters", and "Limit Sections". A "Filter Properties" dialog box is open in the center, allowing the user to select a filter rule. The dialog box has a "Rule" section with a dropdown menu currently showing "--Select a Filter--". Below this, there are two sections: "Columns" and "Searchable Fields". The "Columns" section lists: "Participant Name/ID", "Program Enrollment ID", "Program Enrolling", and "Site". The "Searchable Fields" section lists: "Legal Name First", "Legal Name Middle", "Legal Name Last", "Preferred Name/Nickname", "Date of Birth", "Mobile Phone", "*Program Enrolling", and "*Site". At the bottom of the dialog box, there is a blue button labeled "Start Date" and a button labeled "Exit Date". The background interface shows a table with columns for "Site" and "Program Enrollment", and a green "Apply" button. A message at the bottom of the interface reads: "Auto run has been... use it uses limit sections. Please publish and run your report to... results".

Adding a Filter to All Data

The second way to filter these results is to add a filter below in the Limit Section

- Select Show on the Limit Section
- Unhide the section
- Add the filter to filter all data

This is applying the filter to ALL data BEFORE the limit has been applied, effectively changing the dataset that the limit can be applied to.

Program Enrollment (Program Enrollment) ▼ Limit Section [First Created] ⚙️

▼ Forms

- Participant (Always)
- Program Enrollment (Always)

▼ Filters

- Start Date This Month

▼ Limit Sections

Filter Properties [Close]

Rule

Start Date ▼

This Month ▼

* indicates fields that are already included in this section

Options

- Inverse
- Locked
- Hidden
- Global
- Comparison

Delete 3 Apply

▶ Leo Doc	Row Count	1
▶ Leo Mo	Row Count	1
▶ Molly W	Row Count	2
▶ Rashida	Row Count	2
▶ Sammy Costello (2603)	Row Count	1
Total Rows		7

Use Case

The screenshot displays a web application interface with a sidebar on the left and a main content area on the right. The sidebar is titled "Services Provided by Program" and contains several expandable sections: "Forms", "Filters", "Group Filters", and "Limit Sections". Under "Filters", a filter rule is visible: "Start Date Is Between 05/01/2024 and 05/31/2024". Under "Limit Sections", a section titled "Program Enrollment (Services Provided by Program)" contains a sub-section "*Program Enrolling Equals Youth Services".

The main content area shows a "Filter Properties" dialog box. The dialog has a title bar with a close button. It contains the following fields and options:

- Rule:** A dropdown menu set to "Start Date", followed by another dropdown set to "Is Between". Below these are two date input fields: "05/01/2024" and "05/31/2024", each with a calendar icon. A note below the dates reads: "* indicates fields that are already included in this section".
- Options:** A list of checkboxes:
 - Inverse
 - Locked (highlighted with a red box)
 - Hidden
 - Global
 - Comparison
- Buttons:** Two green buttons at the bottom: "Delete" and "Apply".

At the bottom of the dialog, there is a link that says "Click to refresh data".

Limited Data Results:

Monthly Youth Services Program Enrollments ▼

▼ Forms

Participant

Program Enrollment

▼ Filters

*Start Date Is Between 05/01/2024 and 05/31/2024 ✎

▼ Limit Sections

Youth Services Enrollment - Full Data Set [First Created] **Hide**

*Program Enrolling Matches Any Of Youth Services

Report last run May 29th 2024, 3:21 pm
[Click to refresh data](#)

▶ Youth Services

Percent of Total **100%** Row Count **2**

Total Rows
2

Full Data Set:

Youth Services Enrollment - Full Data Set ▼ Limit Section [First Created]

▼ Forms

Participant

Program Enrollment

▼ Filters +

*Program Enrolling Matches Any Of Youth Services

▼ Limit Sections

Report last run May 29th 2024, 3:19 pm
[Click to refresh data](#)

▶ Leo Dodds (2544)	Row Count 2
▶ Leo Morales (2586)	Row Count 1
▶ Rashida Tray (2577)	Row Count 1
Total Rows 4	

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)

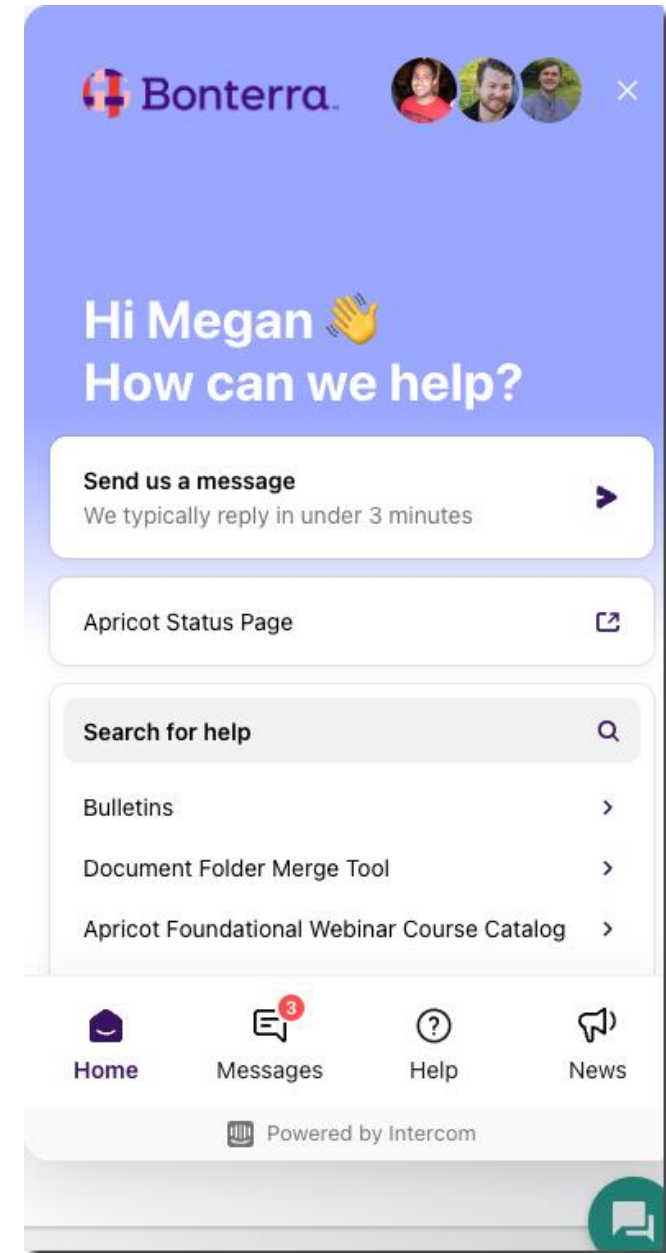


Build confidence & knowledge in
our software!

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.