Using Aliases in Reporting

Apricot Targeted Webinar

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Meet Your Trainer

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Learning Objective

This training will cover:
- Adding Aliases
- Adding Filters to Aliases

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

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Agenda

What is an Alias?

Adding an Alias

Configuring an Alias

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Aliases

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What is an Alias?

- Allows you to compare multiple versions/responses to a field on a form

- Must be used in conjunction with a Limit

- Useful for comparison reporting

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Adding an Alias

1. Ensure you have a limit on the applicable form for first or last created
2. Select the "+" beside the Alias heading to add
3. Rename and determine the limit you wish to apply for comparison

Configuring Your Alias

1. Drag and drop the field you wish to compare for EACH alias you have added in
2. Edit each column to pull from a different alias

Publish & Run Report

Once all aliases have been added and configured, you can publish and run your report!

Aliases - Happiness Assessment ▼

▼ Forms
    Participant
       * Happiness Assessment
▼ Filters   +
▼ Limit Sections

Report last run May 29th 2024, 11:55 am
Click to refresh data

Displaying 8 of 8 Rows (Expand All Cells)

Name	Total Happiness Score	Total Happiness Score [Mid Assessment]	Total Happiness Score [Post Assessment]
Leo Dodds (2544)	20	20	20
Maisy Zurcher (2545)	20	18	20
Molly Walker (2564)	20	20	20
Henry Smith (2575)	4	8	14
Michael Jones (2576)	14	14	20
Rashida Tray (2577)	12	16	20
Leo Morales (2586)	10	12	16
Sammy Costello (2603)	8	12	16

Total Rows
8

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Graph It!

Depending on what you have used this for, a graph could be an interesting and helpful visual representation of this comparison!

Change in Happiness Assessment: Pre - Mid - Post

Leo Dodds (2544) • Maisy Zurcher (2545) • Molly Walker (2564) • Henry Smith (2575) • Michael Jones (2576) • Rashida Tray (2577) • Leo Morales (2586) • Sammy Costello (2603)

Graph It!

Change in Happiness Assessment: Pre - Mid - Post

13.5	15	18.3
Total Happiness Score	Total Happiness Score [Mid Assessment]	Total Happiness Score [Post Assessment]
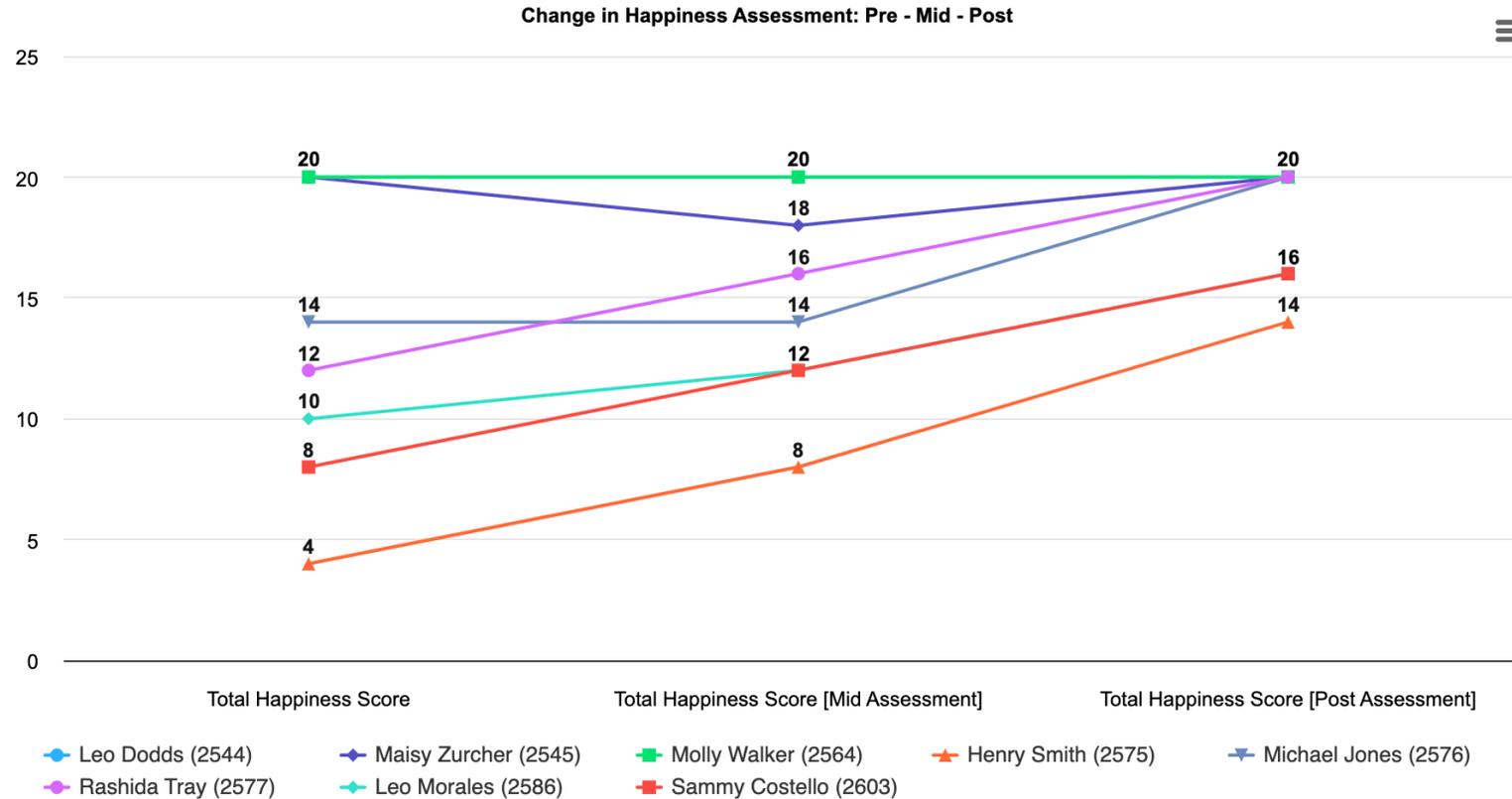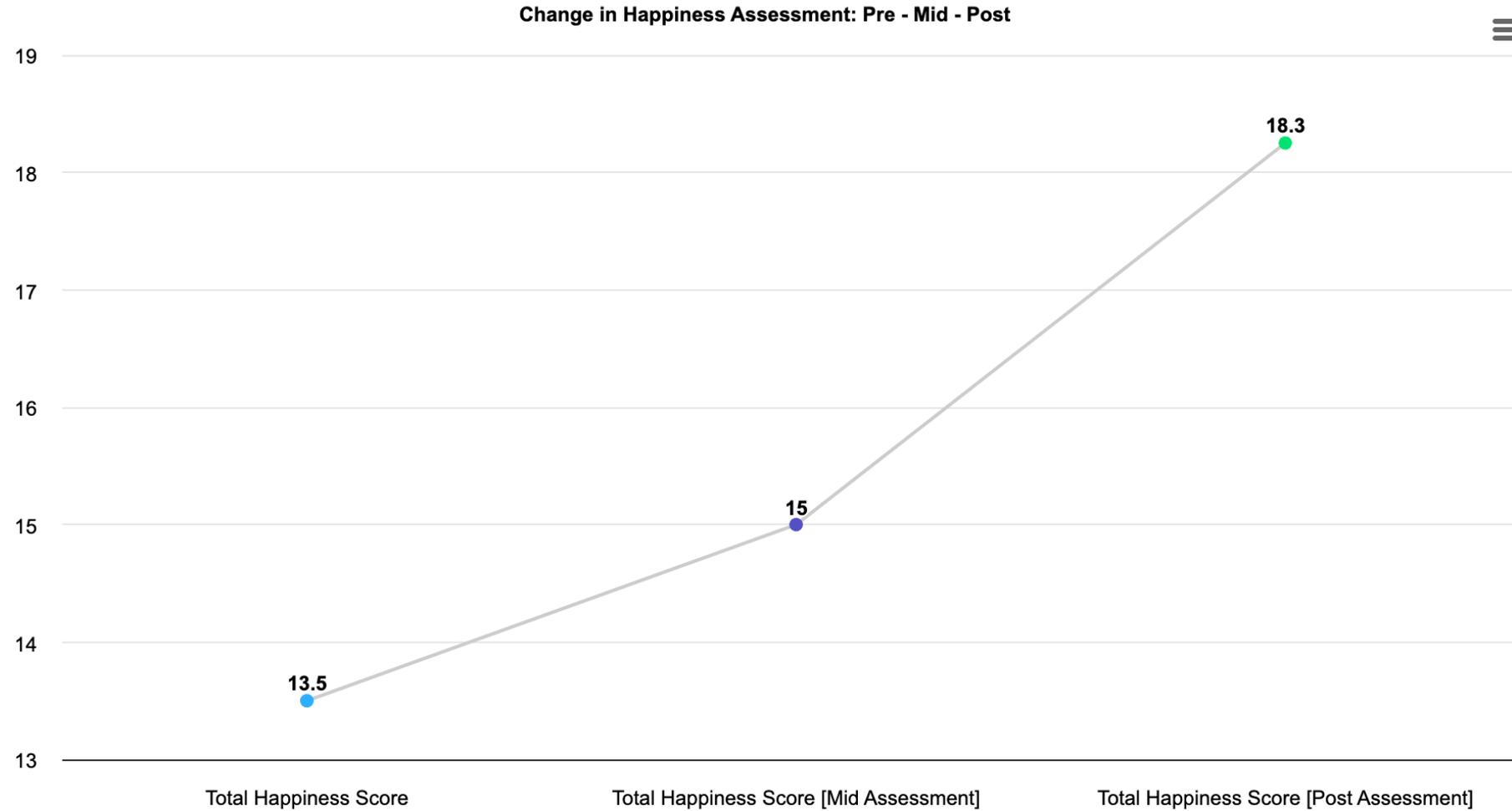
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Additional Resources

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!

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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
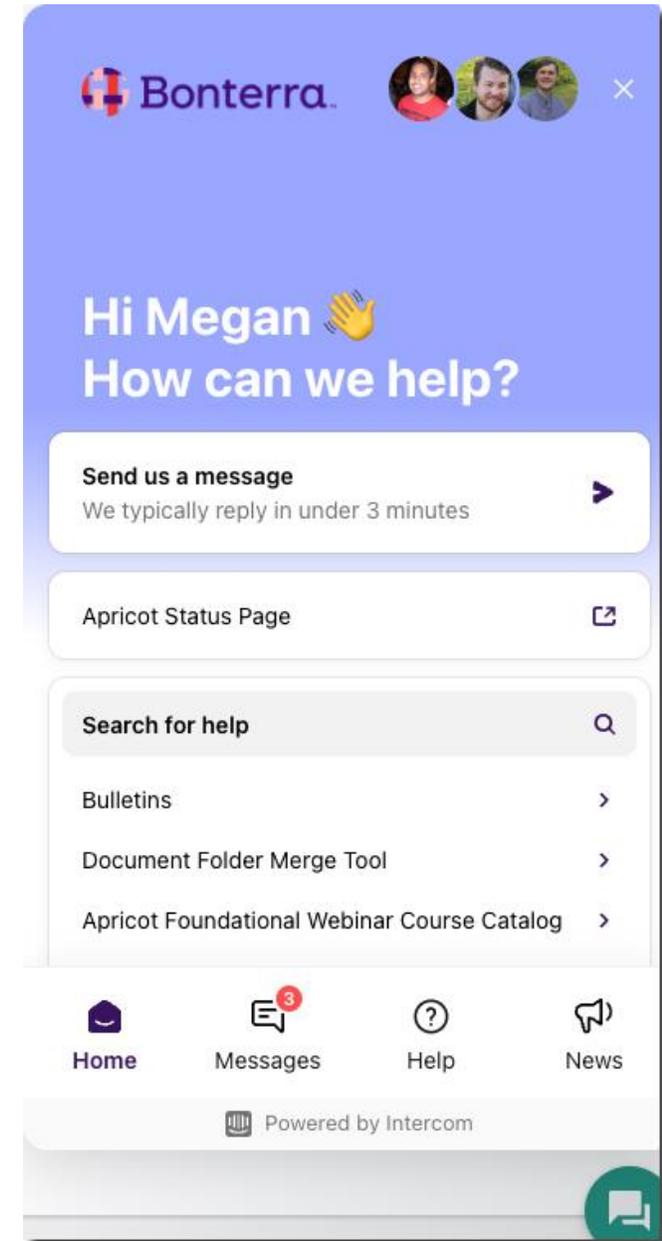
Q & A

- 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!

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Thank you for attending!

We hope to see you
in future trainings.

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