

Using Aliases in Reporting

Apricot Targeted Webinar

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.

Agenda

What is an Alias?

Adding an Alias

Configuring an Alias

Aliases

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

Happiness Assessment Form Properties [highlight]

Connected To	Using Field
'Participant'	'Record ID'
Required	Limit
<input checked="" type="radio"/> Always	<input type="radio"/> None
<input type="radio"/> Sometimes	<input type="radio"/> Last Created
<input type="radio"/> Never	<input checked="" type="radio"/> First Created

Participant records will only be included if they have at least one Happiness Assessment record

Enforce Programs filter (where applicable)

Enforce User Level Access filter (where applicable)

Aliases +

Name	Limit
Mid Assessment	<input type="radio"/> Last Created
	<input checked="" type="radio"/> Next Created
	<input type="radio"/> Previous Created
	<input type="radio"/> First Created
Name	Limit
Post Assessment	<input checked="" type="radio"/> Last Created
	<input type="radio"/> Next Created
	<input type="radio"/> Previous Created
	<input type="radio"/> First Created

Delete Apply

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

Aliases - Happiness Assessment ▼

- ▼ Forms
 - Participant (Always)
 - * Happiness Assessment (Always)
- ▼ Filters
- ▼ Limit Sections
 - Happiness Assessment (Aliases - Happiness Assessment) [First Created]
 - Happiness Assessment (Aliases - Happiness Assessment) [Mid Assessment]
 - Happiness Assessment (Aliases - Happiness Assessment) [Post Assessment]

Happiness Assessment Form Properties [highlight]

Connected To: Using Field: 'Participant', 'Record ID'

Required: Always, Sometimes, Never

Limit: None, Last Created, First Created

Participant records will only be included if they have at least one Happiness Assessment record

Enforce Programs filter (where applicable)

Enforce User Level Access filter (where applicable)

Aliases +

Name	Limit
Mid Assessment	<input type="radio"/> Last Created, <input checked="" type="radio"/> Next Created, <input type="radio"/> Previous Created, <input type="radio"/> First Created
Post Assessment	<input checked="" type="radio"/> Last Created, <input type="radio"/> Next Created, <input type="radio"/> Previous Created, <input type="radio"/> First Created

Report la

Auto run has been disabled for this report section

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

The screenshot shows the 'Aliases - Happiness Assessment' interface. A 'Column Properties' dialog box is open, displaying the following settings:

- Name:** Total Happiness Score [Post Assessment]
- Data Style:** Normal, Dollars, Percent, 2 Decimal, Whole Number
- Summary:** No Summary, Total, Average, Average (no zeroes), Minimum, Maximum, Count Distinct
- Group By This Column:** No, Yes

The 'Form Info' section shows:

Form	Section	Field
Happiness Assessment	Main	Total Happiness Score

Red circles with numbers 1, 2, and 3 highlight the gear icon on the table header, the 'Form Info' section, and the 'Form' dropdown menu, respectively.

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](#)

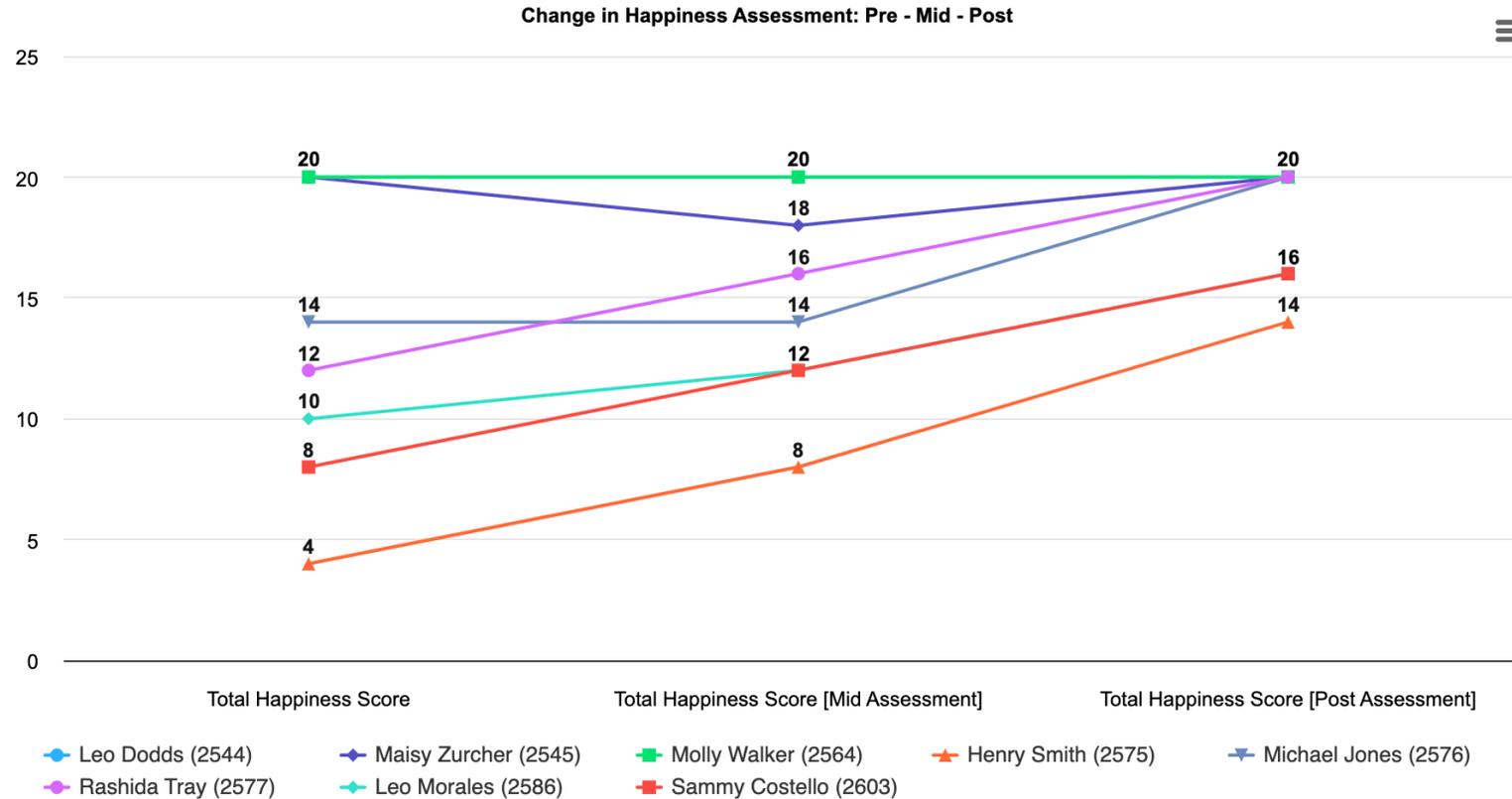
Search Displaying 8 of 8 Rows (Expand All Cells)

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

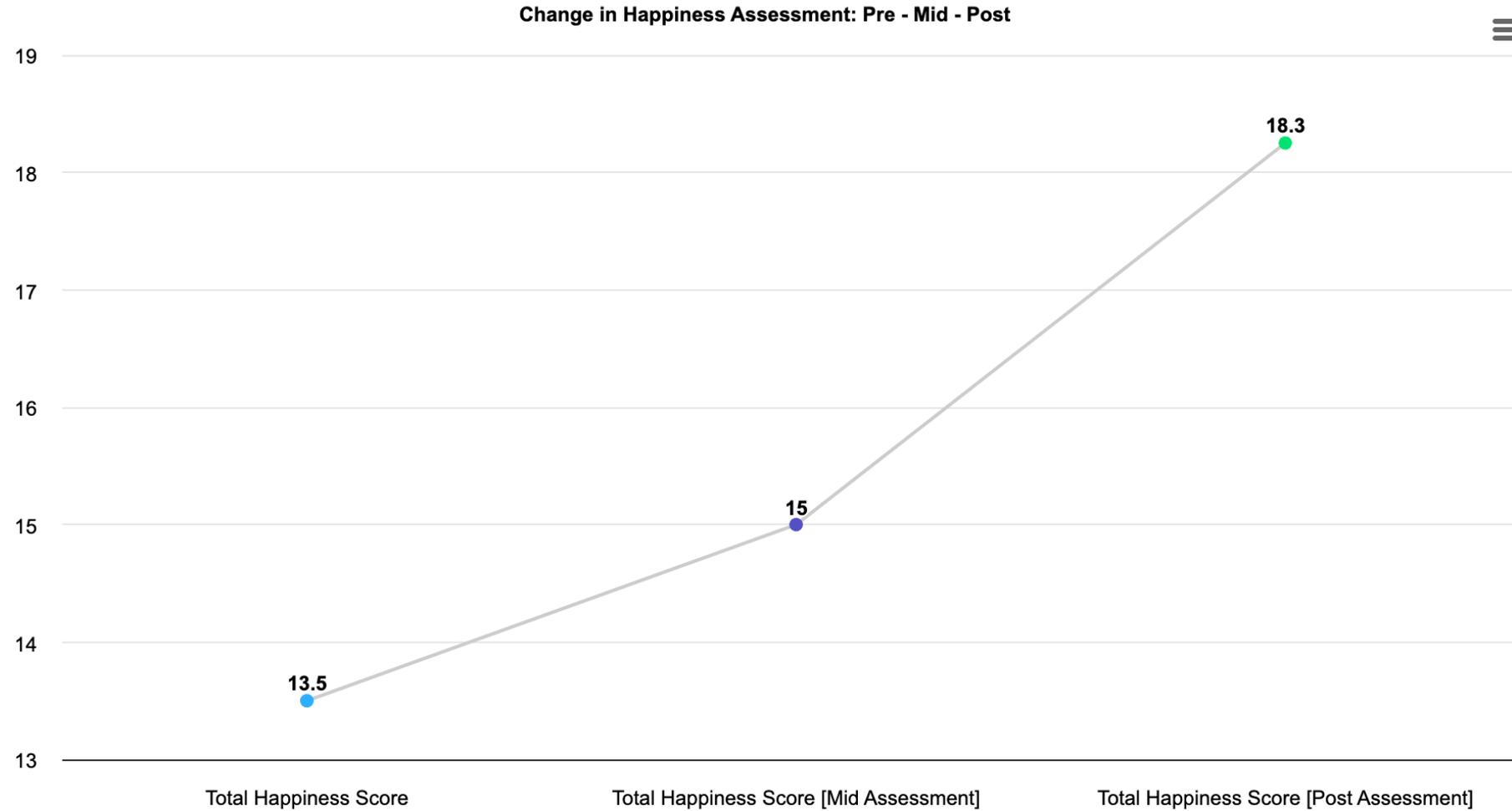
Total Rows
8

Graph It!

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



Graph It!



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)

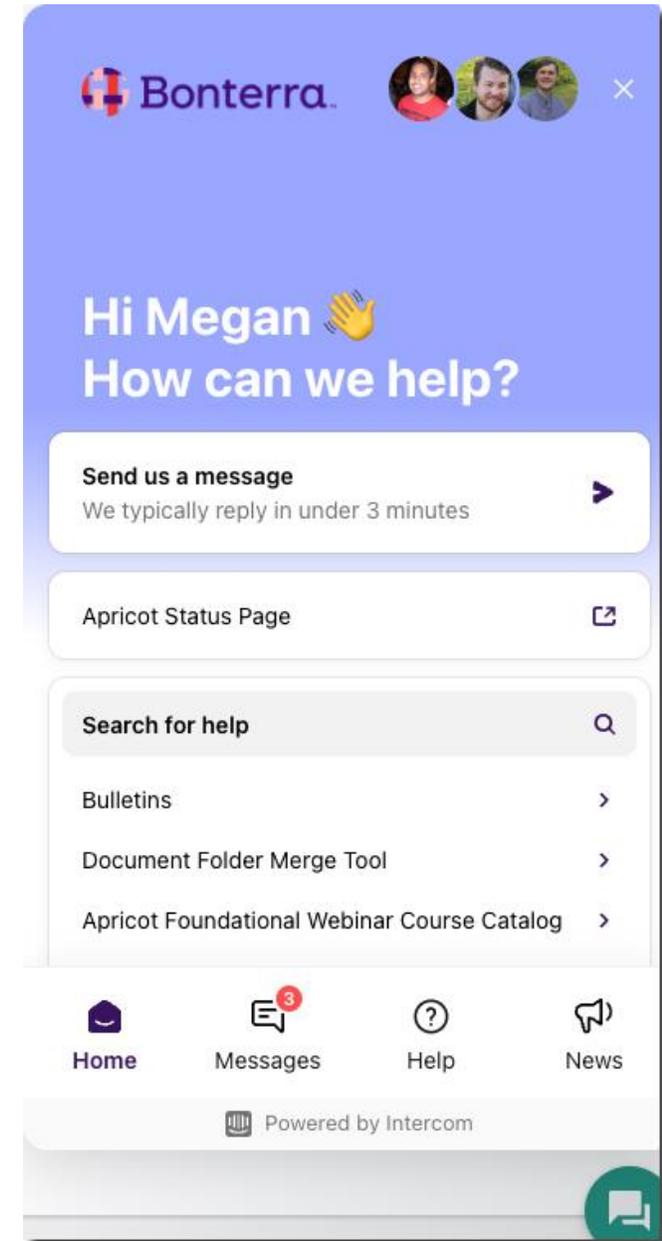


Build confidence & knowledge in
our software!

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.