

Results Webinar Advanced Query Filters

Meet Your Trainer

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Learning Objective

Help Report Writers understand best practices for using the query filter in results so that users feel confident when narrowing data sets within Results reports.

Agenda

Filtering Overview

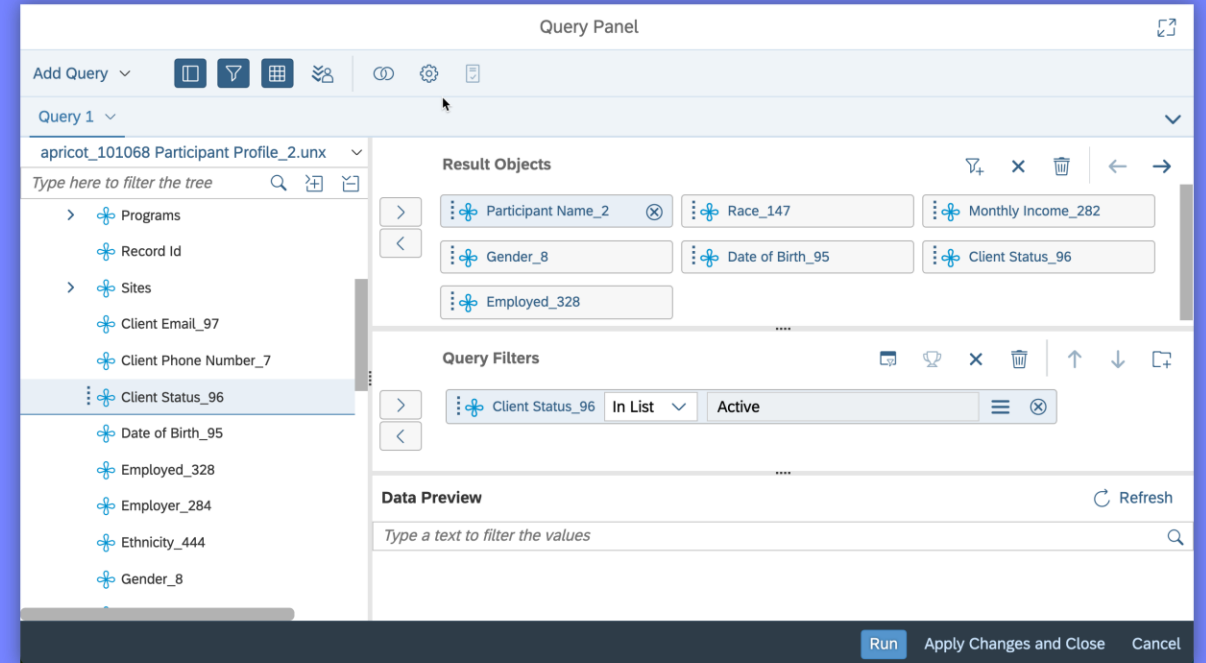
Consolidate Prompts

Filter Logic

Filtering Overview

When to Use Query Filters:

- This can be considered the first layer of filtering the data; narrows which data from the selected universe will be returned in the report
- The less data the report generates, the faster it will generate
- Additional filters can be applied within the report if needed using Report Filters and/or Input Controls



Steps for Setting Up Query Filters

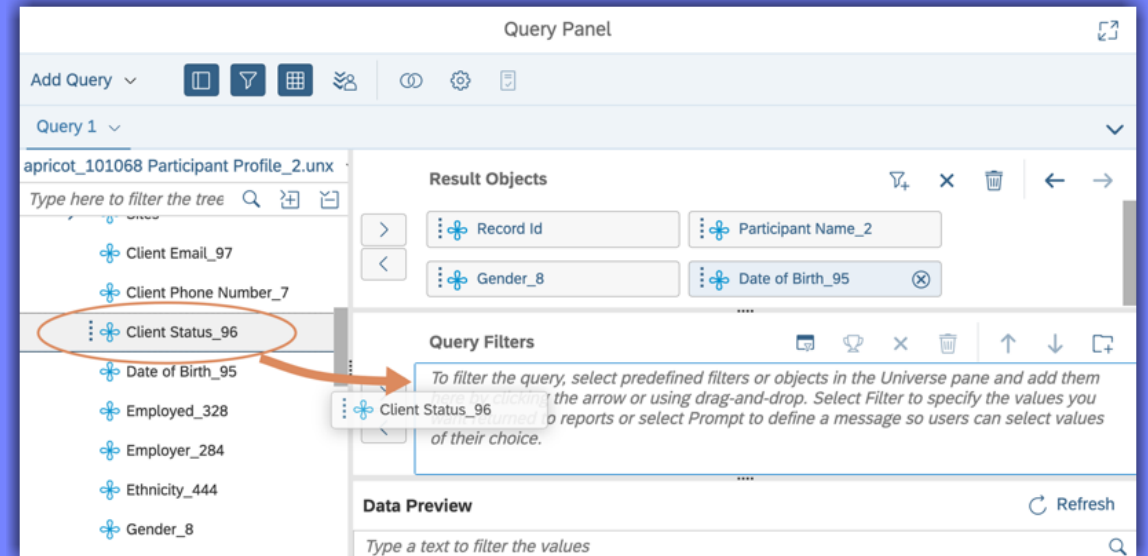
1. Determine which Data Element(s) to filter by
2. Select Filter Functions (Equal To, In List, Between, etc)
3. Select Filter Type (Constant, Values from list, Prompt)
 - Configure Prompt Properties if applicable
 - Consolidate Prompts using Prompt Text if applicable

Filter Logic options that are less commonly used, but are important to know:

- Set Filter Relationships (And/Or)
- Nesting

Step 1: Select Which Data to Filter By

- Drag and drop data element or select and click the right arrow to move into Query Filters box
- If needed, multiple fields can be included in the Query Filters

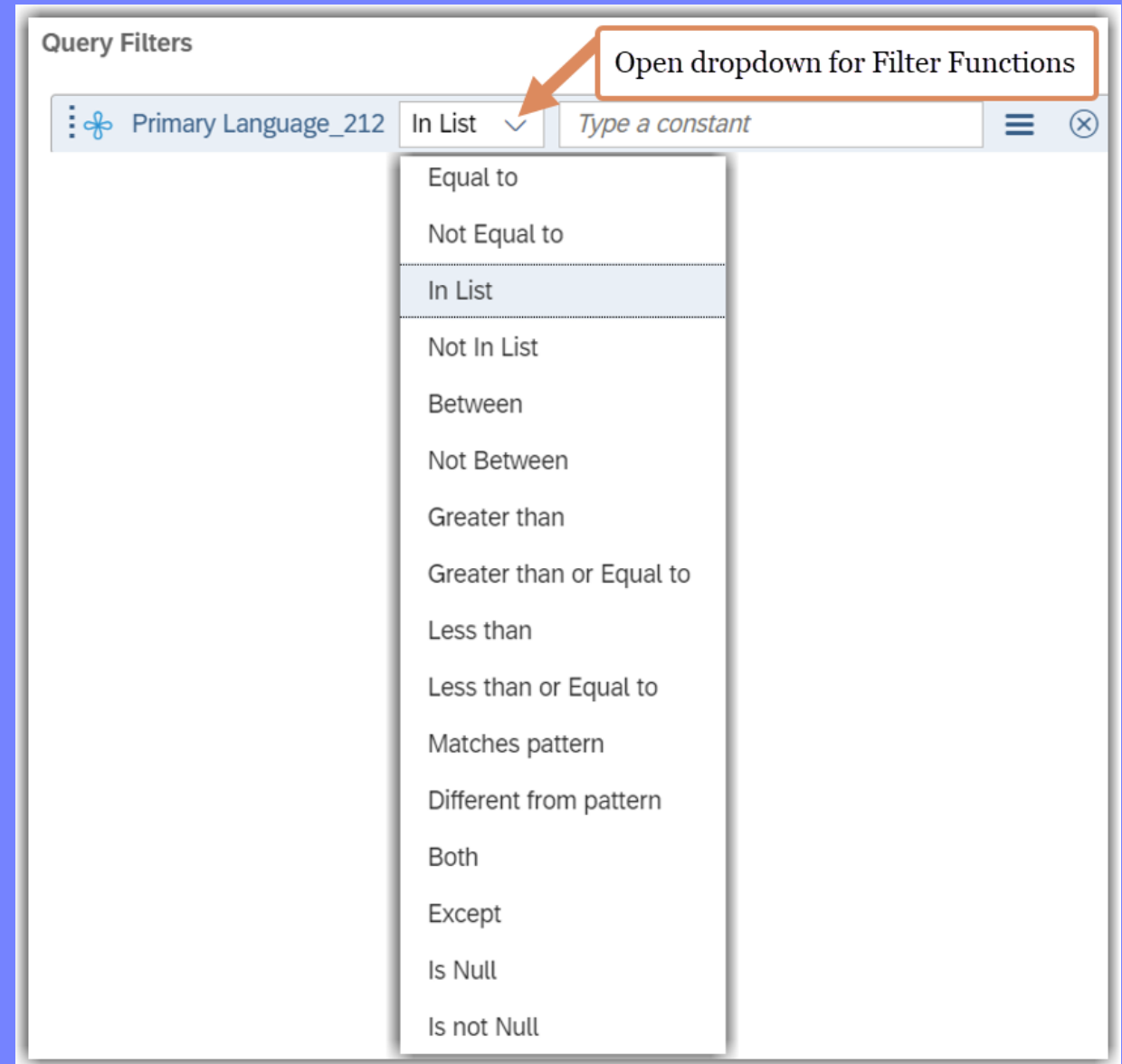


Step 2: Filter Function

Click to open the dropdown following the field name

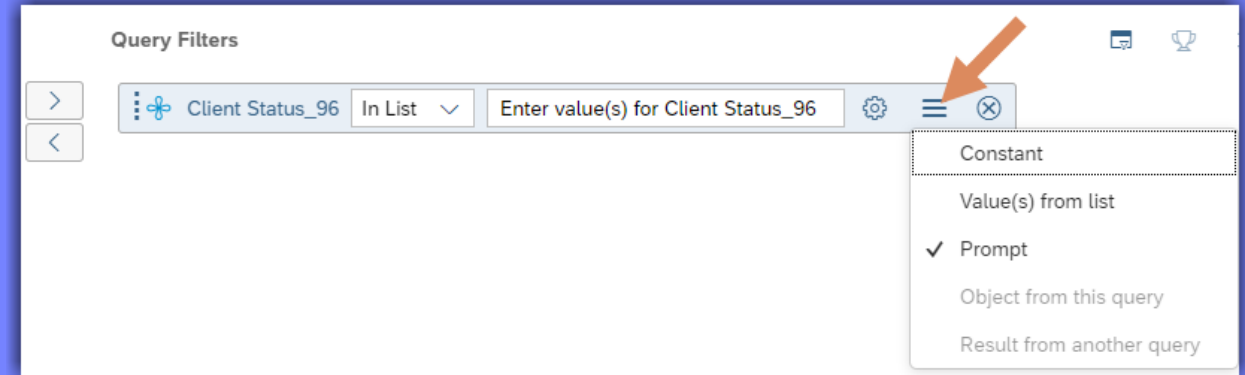
Popular functions include:

- Equal to
- In List
- Between
- Great than
- Less than



Step 3: Filter Type

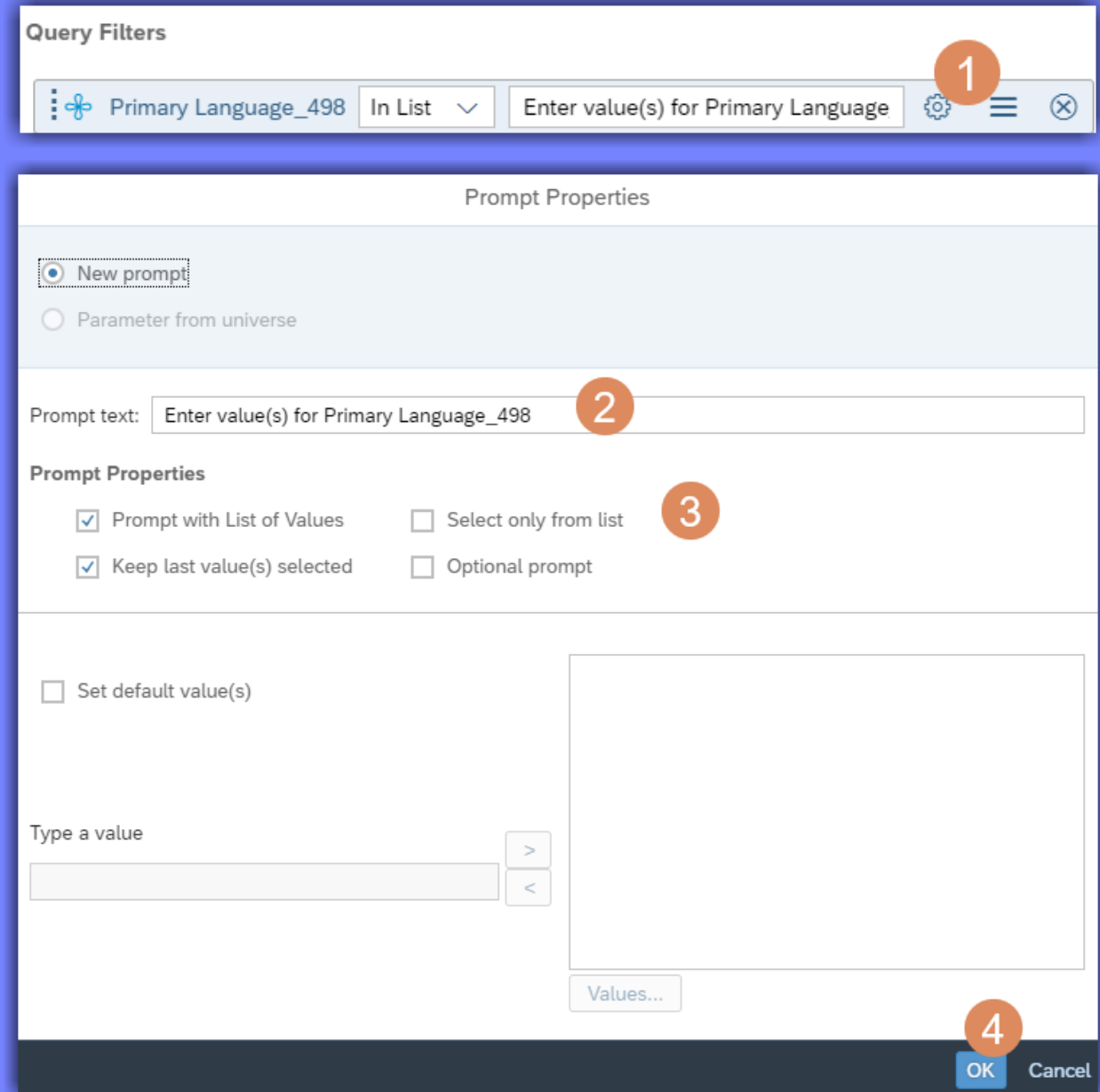
- Constant will be based on what the Report Builder selects
- Value(s) from list allows the report builder to select criteria from a list of options
- Prompt unlocks the filter, meaning any user running the report will set the values for that



Prompt Properties

Adjust how users will experience prompts

1. Click the gear icon to access options, including:
 - Update prompt text
 - Prompt with list of values, Make prompt optional, Keep last values selected, etc
2. Click OK to save changes made to prompt properties



Query Filters

Primary Language_498 In List Enter value(s) for Primary Language

Prompt Properties

New prompt
 Parameter from universe

Prompt text: Enter value(s) for Primary Language_498

Prompt Properties

Prompt with List of Values Select only from list
 Keep last value(s) selected Optional prompt

Set default value(s)

Type a value

Values...

OK Cancel

Best Practice

Keep in mind:

Uncheck Prompt with List of Values when filtering for dates.

Otherwise, users will need to scroll through all available date values and select a date from that list.

The image shows a 'Prompt Properties' dialog box on the left and a date selection list on the right. In the 'Prompt Properties' dialog, the 'Prompt text' is 'Enter Date of Birth Start'. Under 'Prompt Properties', the 'Prompt with List of Values' checkbox is unchecked, and the 'Keep last value(s) selected' checkbox is checked. An orange arrow points to the 'Prompt with List of Values' checkbox. The date selection list on the right is titled '* Enter Date of Birth Start' and contains a search bar and a list of dates. A red 'no' symbol is placed over the date list. A text box with an orange border contains the text: 'If Prompt with List of Values box is left checked this is how the prompting date filter will appear.'

Prompt Properties

New prompt
 Parameter from universe

Prompt text: Enter Date of Birth Start

Prompt Properties

Prompt with List of Values
 Keep last value(s) selected
 Select only
 Optional pr

* Enter Date of Birth Start

Search or enter a value manually

Date of Birth_199

10/1/1989 12:00:00 AM
 1/19/1953 12:00:00 AM
 6/23/1994 12:00:00 AM
 11/11/1989 12:00:00 AM
 12/12/2001 12:00:00 AM
 1/1/1966 12:00:00 AM
 3/22/1990 12:00:00 AM
 1/1/1965 12:00:00 AM

If Prompt with List of Values box is left checked this is how the prompting date filter will appear.

Consolidate Prompts

Consolidate Prompts

Make running reports faster and easier!

Ask yourself if the same values should apply to multiple filters. If yes:

- Adjust prompt text so that it matches
- Test to make sure it works as intended
- This consolidation will reduce the number of prompts a user needs to complete to run the report

Before:

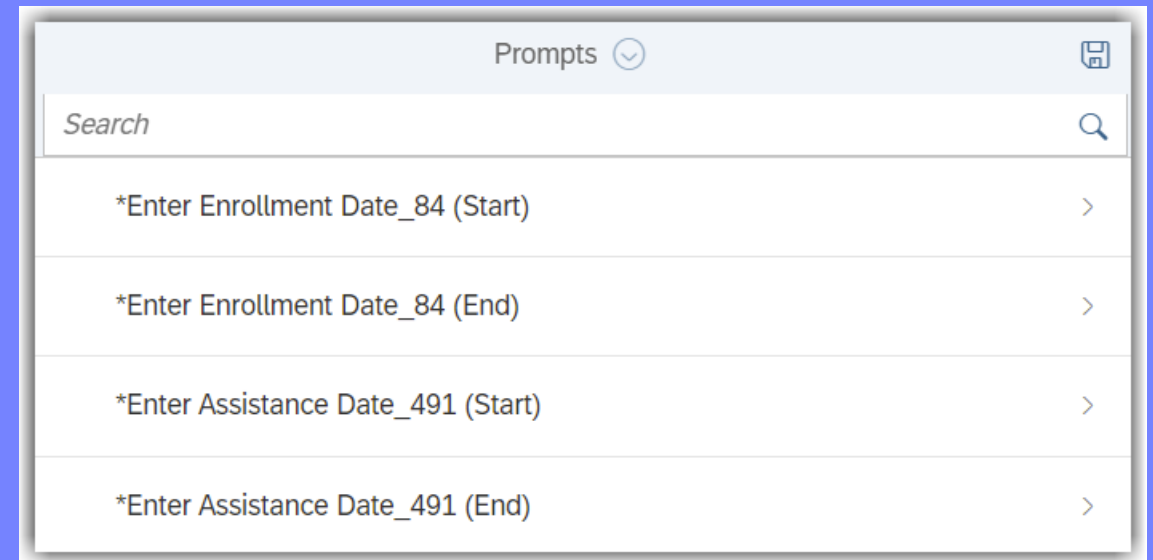


Query Filters

AND

Enrollment Date_84 Between Enter Enrollment Date_84 (Start) And Enter Enrollment Date_84 (End)

Assistance Date_491 Between Enter Assistance Date_491 (Start) And Enter Assistance Date_491 (End)



Prompts

Search

*Enter Enrollment Date_84 (Start)

*Enter Enrollment Date_84 (End)

*Enter Assistance Date_491 (Start)

*Enter Assistance Date_491 (End)

Consolidate Prompts

After:

Enrollment Date_84 Between Start Date End Date

Assistance Date_491 Between Start Date End Date

Prompts

Search

*Start Date >

*End Date >

Filter Logic

Filter Logic

AND/OR

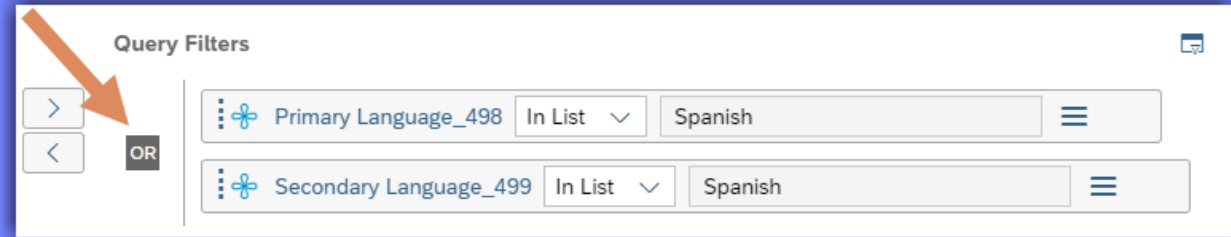
How do the Query Filters relate to one another?

AND – records must match all Query Filters

OR – records must match one or more Query Filters

Click AND and it becomes OR

Click OR and it returns to AND



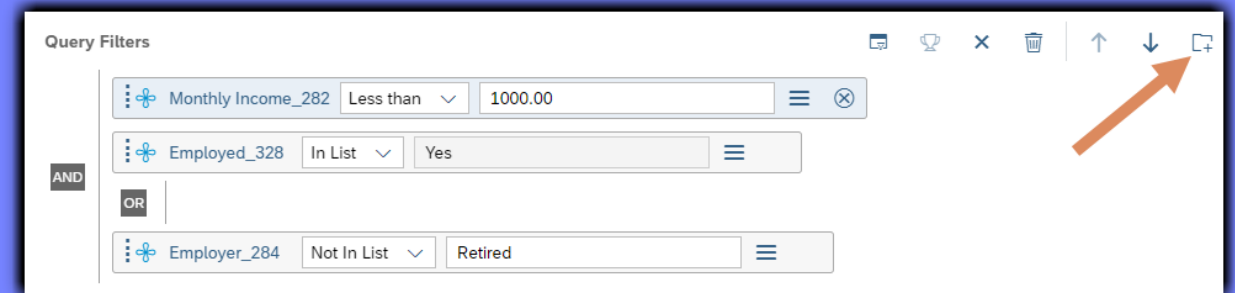
Filter Logic

Add Nested Filter

How do the Query Filters relate to one another?

- Nesting filters can be thought of like adding parenthesis in math
- Inside logic is performed first, followed by Outside logic

In this example, Participants must be Employed OR they have a value for Employer that is not Retired. AND they must have a Monthly Income < \$1000



Additional Resources

Additional Training Opportunities

- Knowledge Base Articles – Search in Chat
- On-demand Videos in our [Bonterra Academy](#)
- Free Webinars & Recordings
- Foundations - Intensive Multiday Trainings that Cover the Basics
- Labs - 2 hr Live Trainings on Specific Topics and Capabilities



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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.