Popular Advanced Formulas Webinar

Bonterra™

Meet Your Trainer

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Training Specialist

Learning Objective

Help Report Writers understand best practices for creating popular advanced formulas and/or variables in results so that users confidently know when to use which tool when designing Results reports.

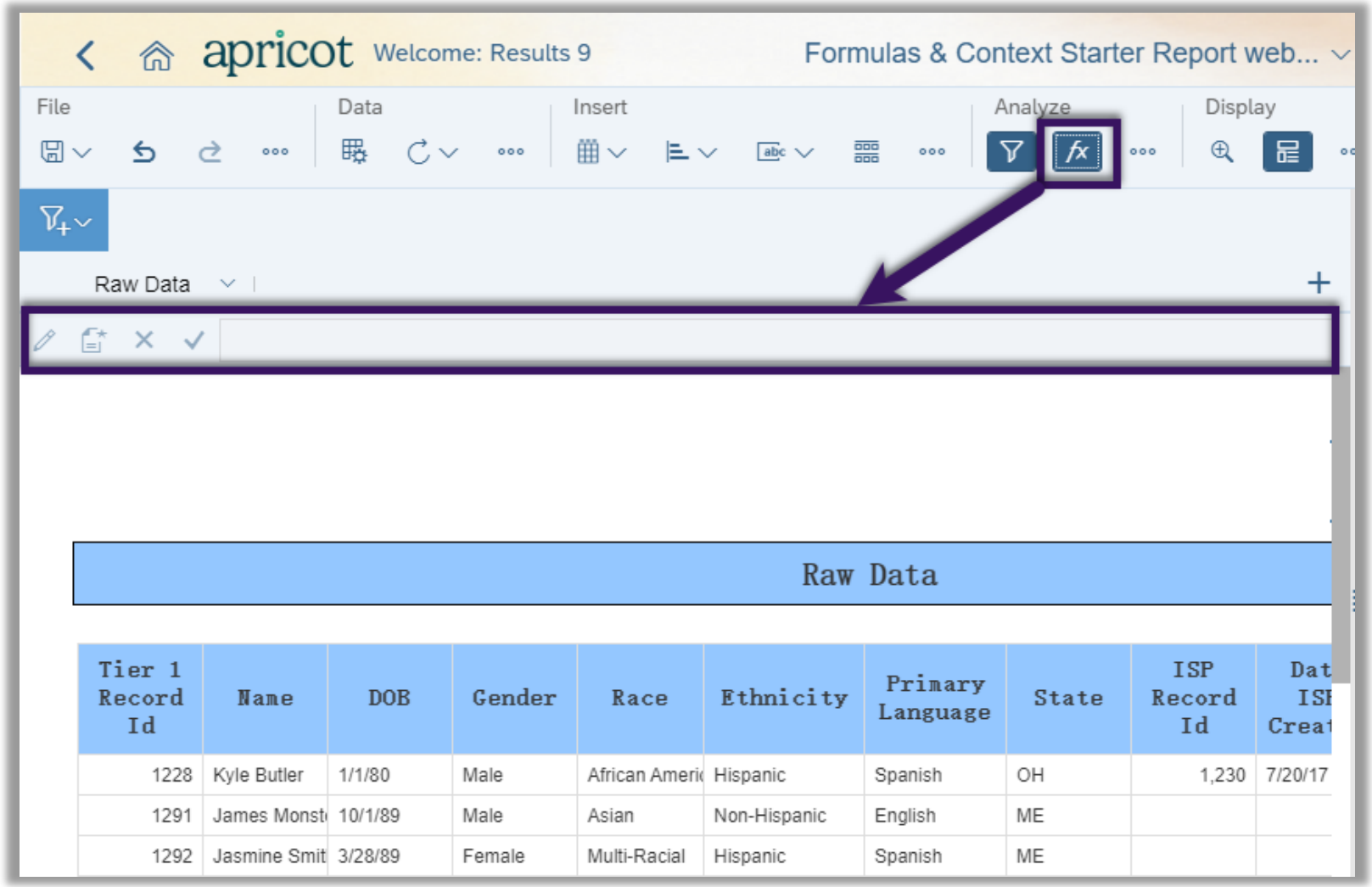
Agenda

- Formula Bar
- Variable Editor
- Popular Advanced Formulas

Formula Bar

Formula Bar

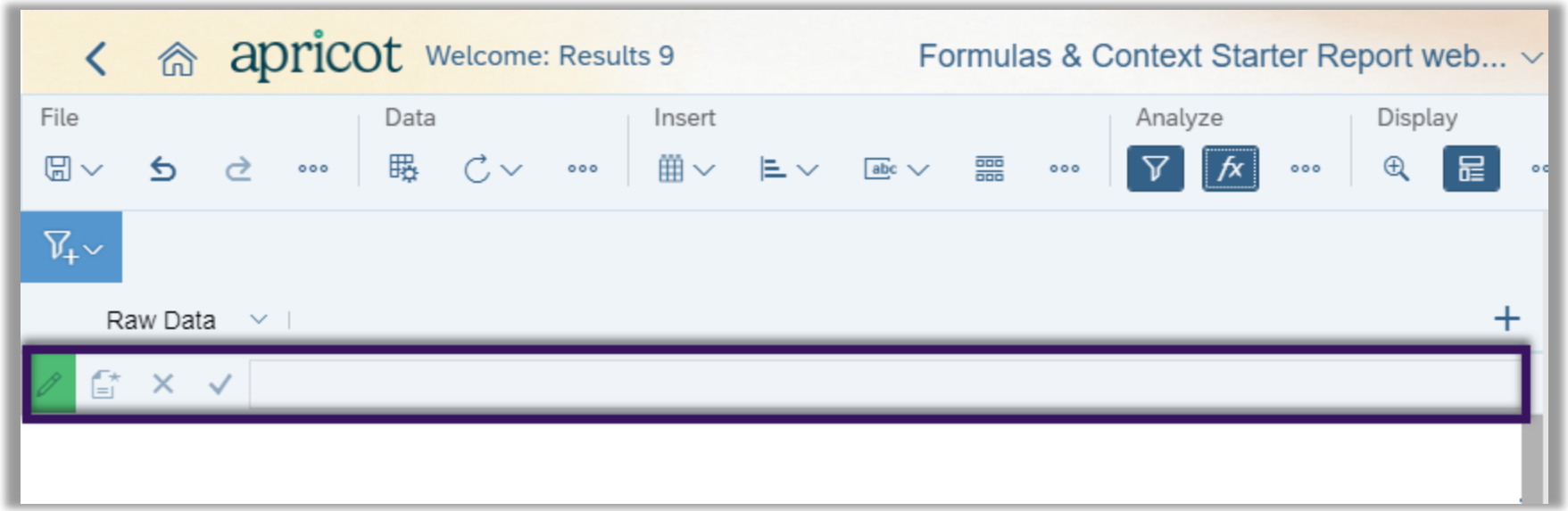
- Window into a cell
- Viewed in 2 ways
  - Click a cell to view bar
  - Click F(x) to collapse or expand



Formula Bar

Four Icons

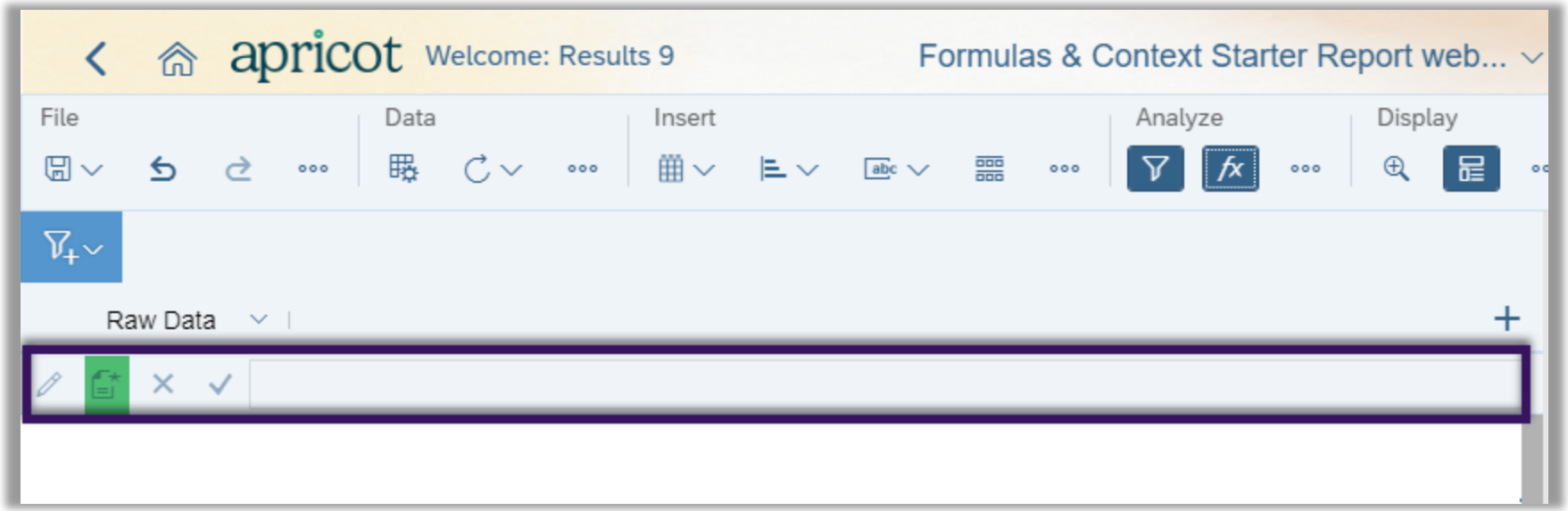
- Formula Editor (pencil icon)



Formula Bar

Four Icons

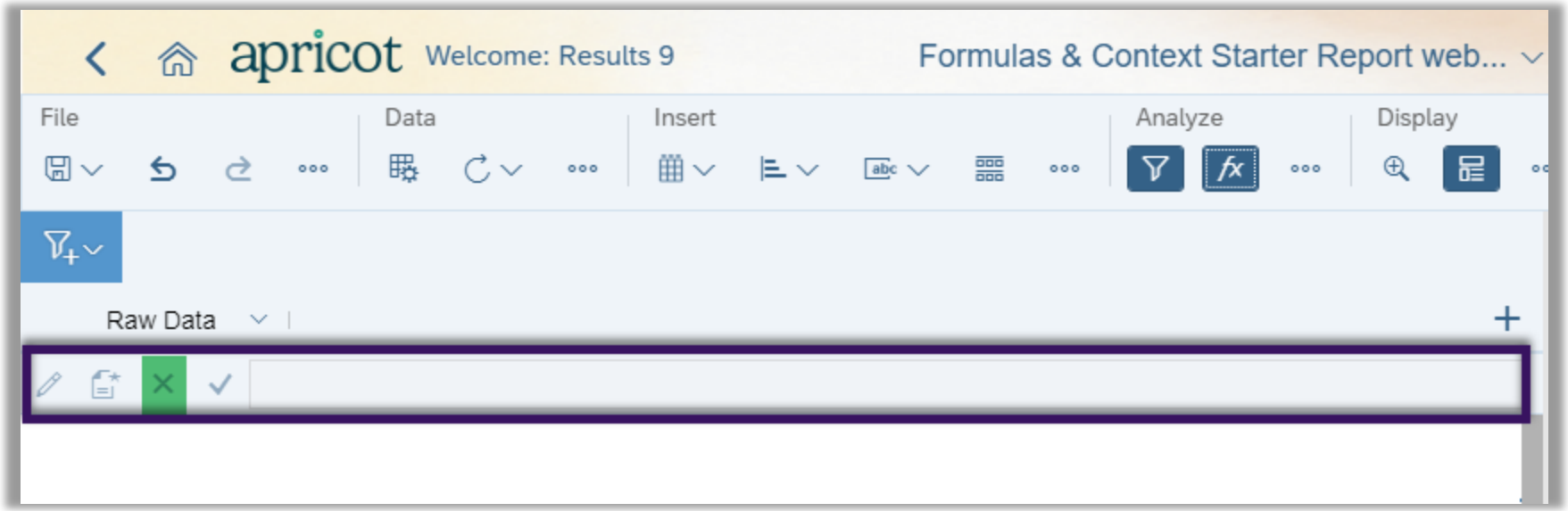
- Formula Editor (pencil icon)
- Create Variable (paper icon)



Formula Bar

Four Icons

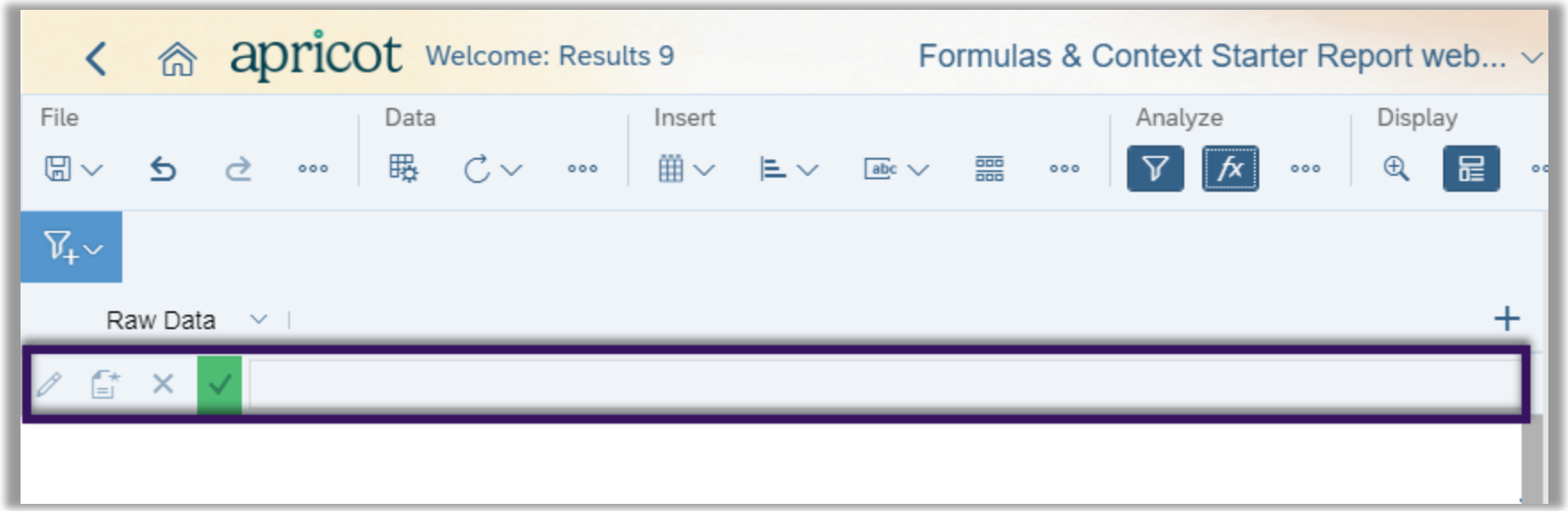
- Formula Editor (pencil icon)
- Create Variable (paper icon)
- Cancel Button (X icon)



Formula Bar

Four Icons

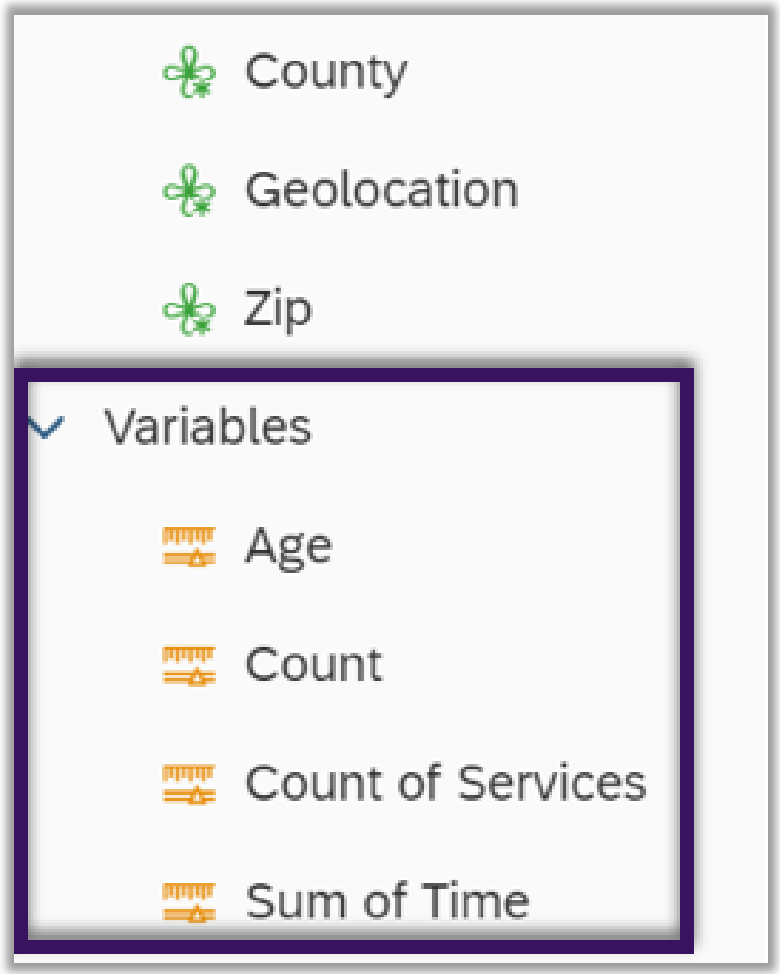
- Formula Editor (pencil icon)
- Create Variable (paper icon)
- Cancel Button (X icon)
- Validate Button (check mark icon)



Variable Editor

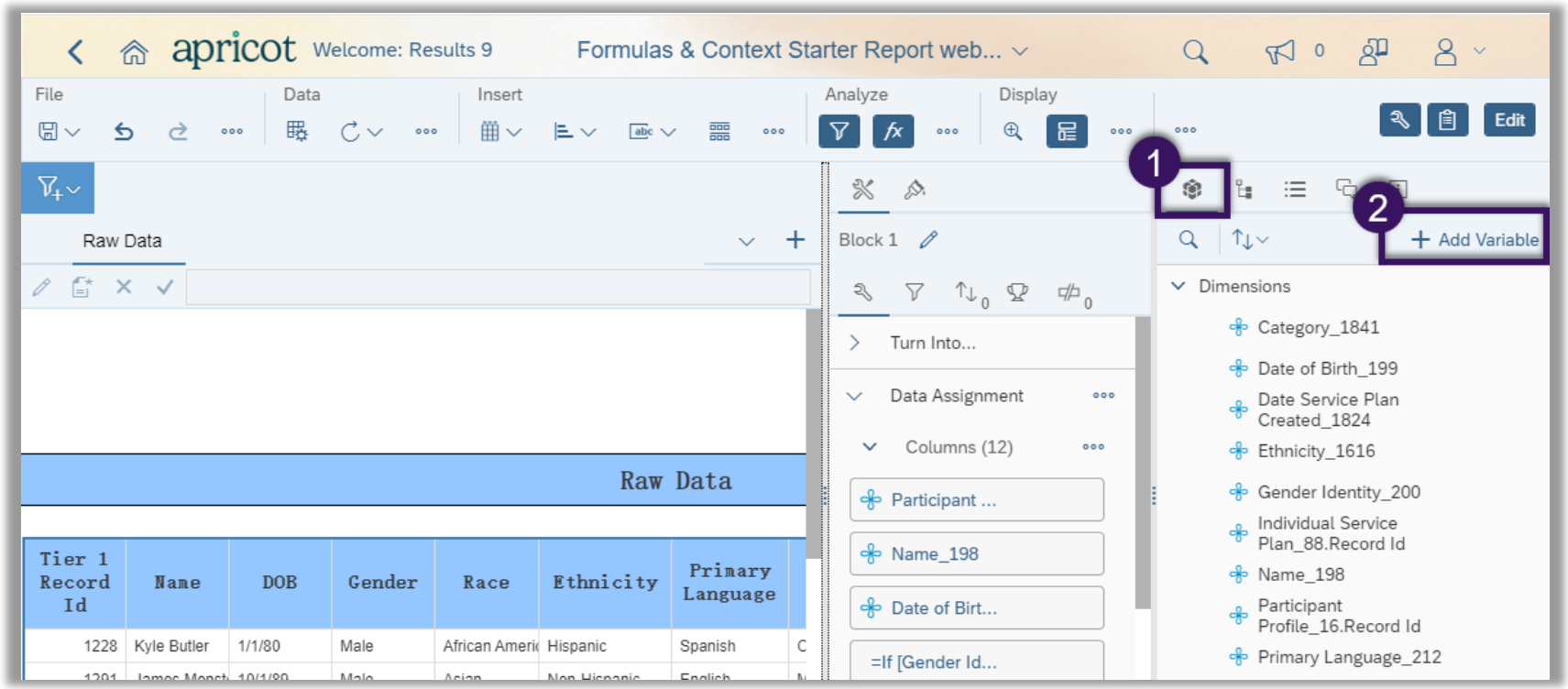
What is a Variable?

- A reusable formula
- Saves time
- Simplifies report design



What is a Variable?

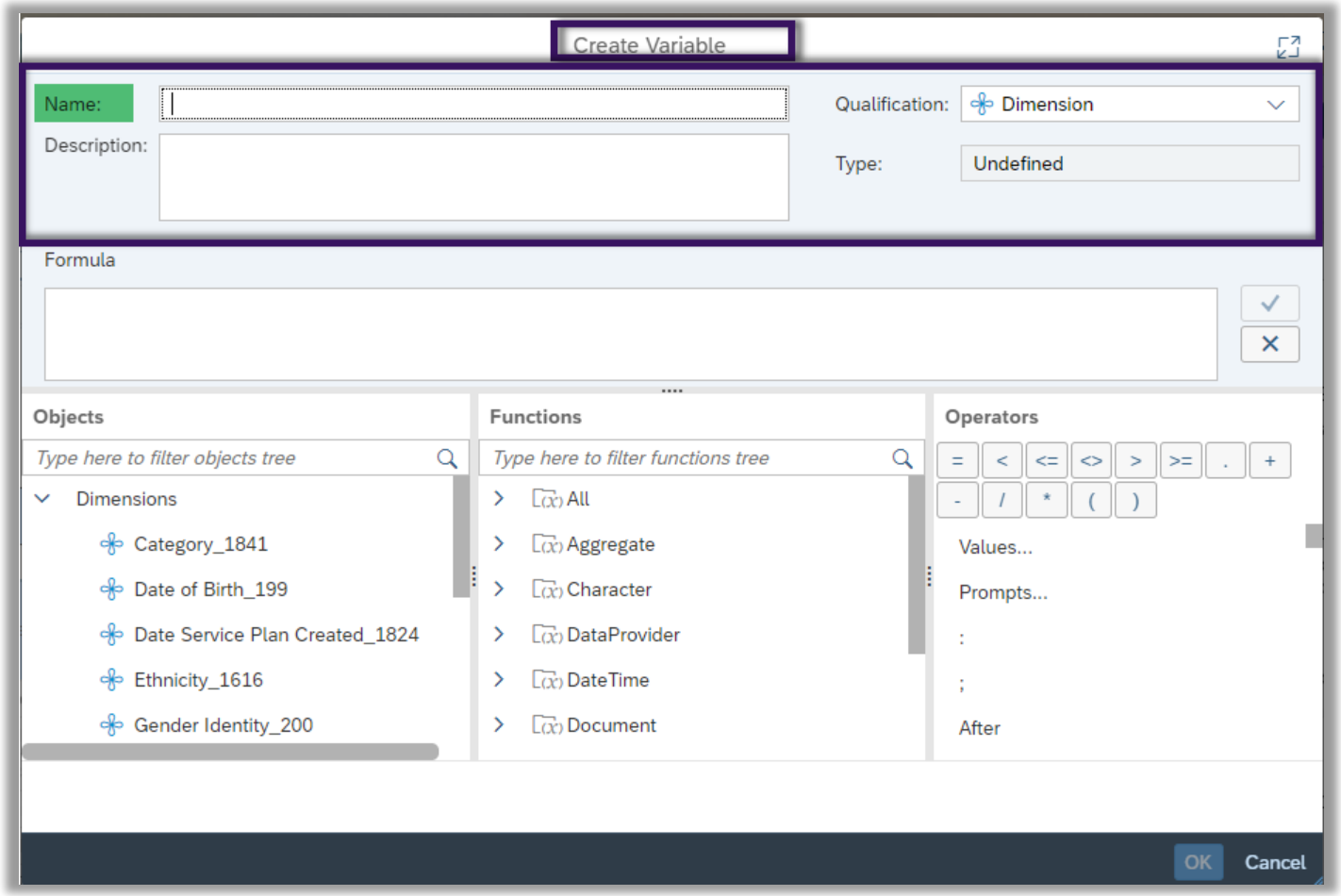
- A reusable formula
- Saves time
- Simplifies report design
- Accessed under Available Document Objects menu



Variable Editor

Four Components

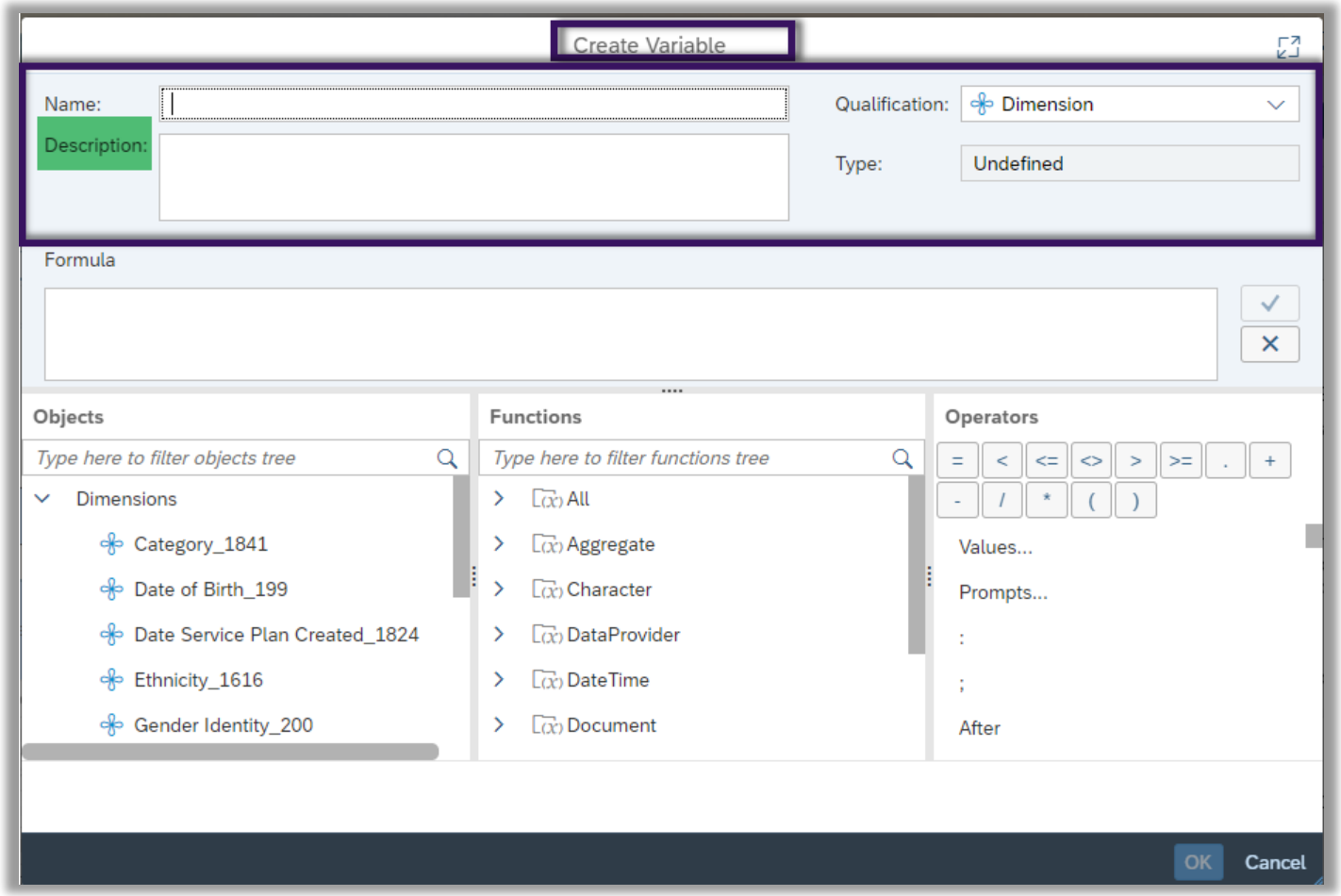
- Name



Variable Editor

Four Components

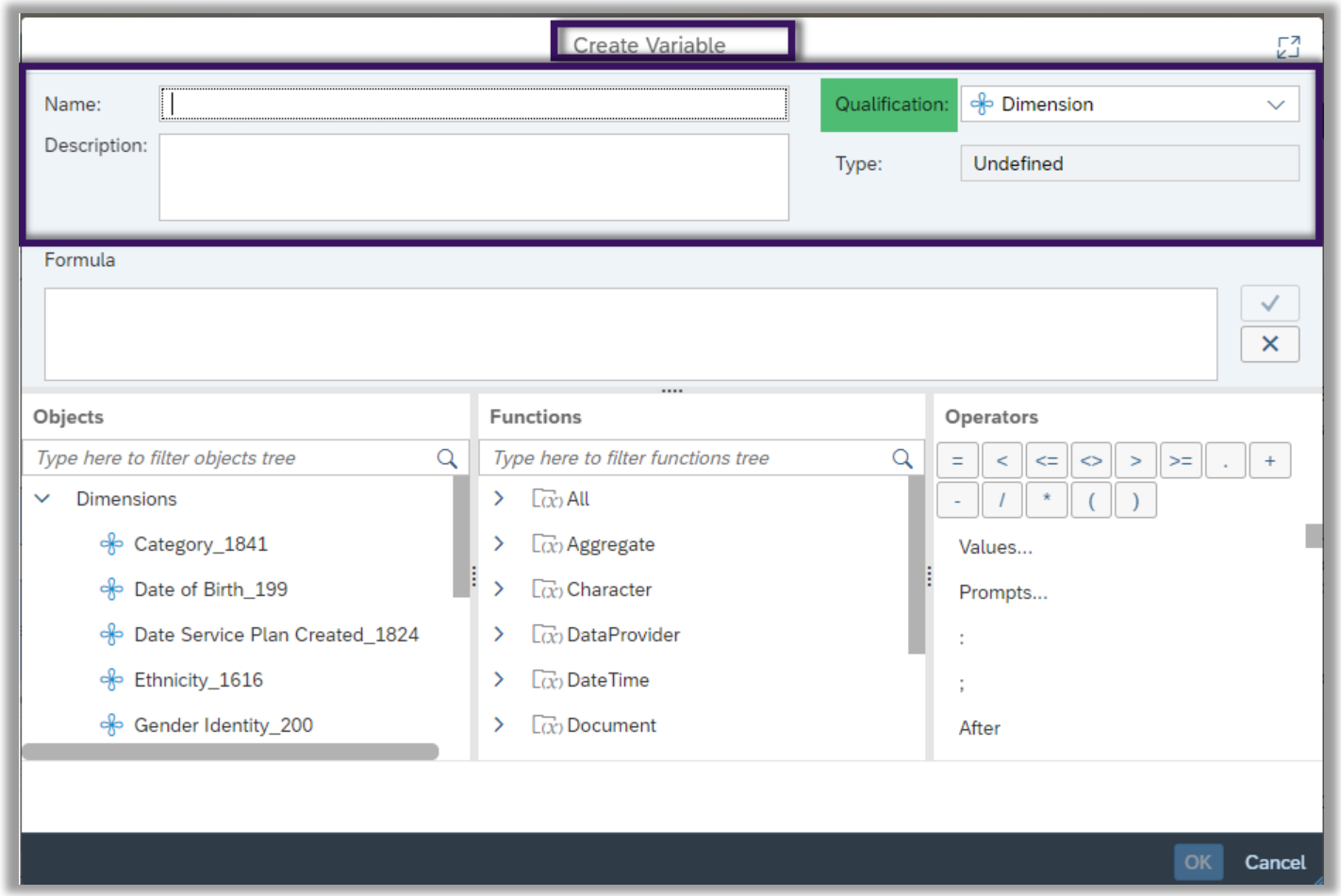
- Name
- Description



Variable Editor

Four Components

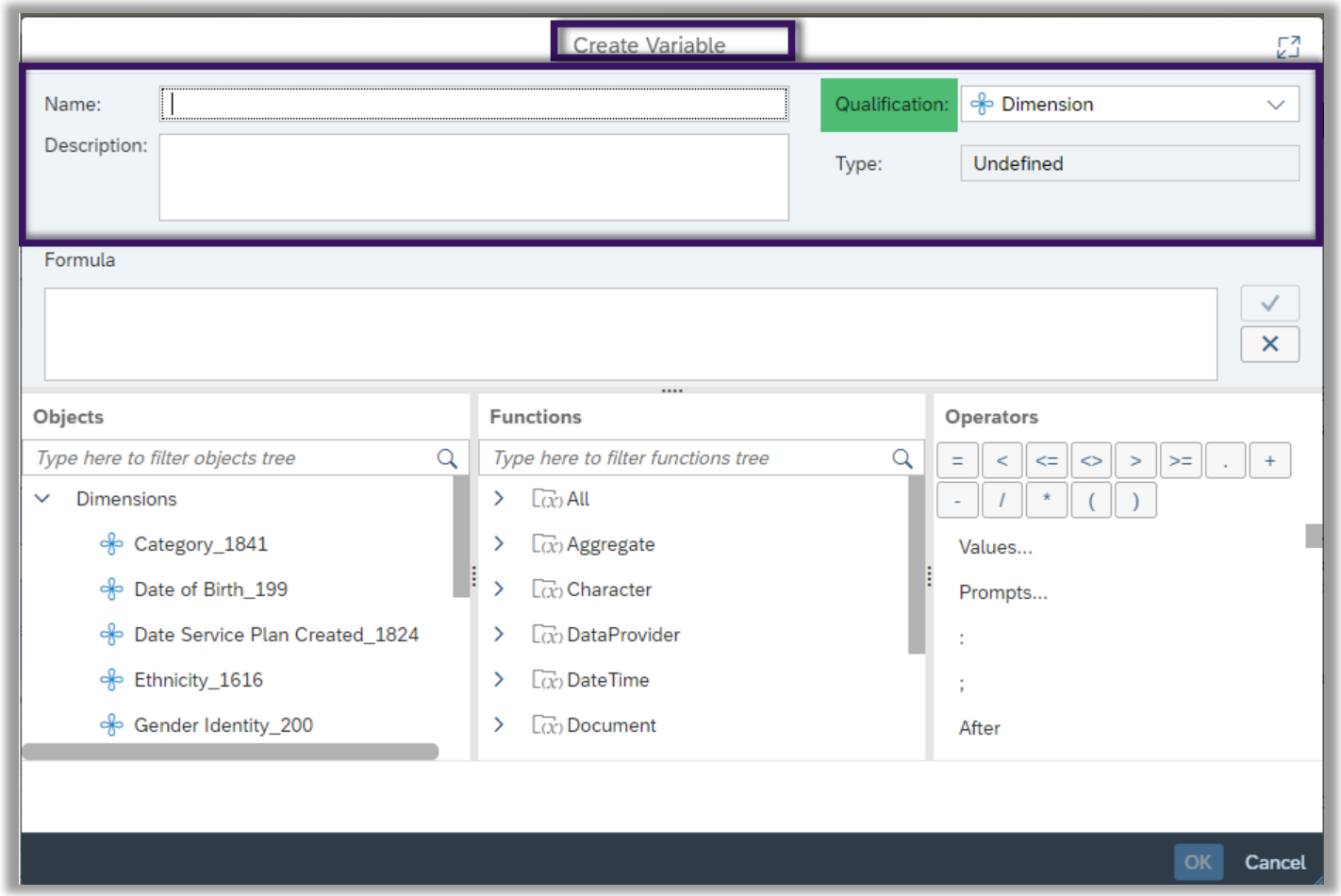
- Name
- Description
- Qualification



Variable Editor

Four Components

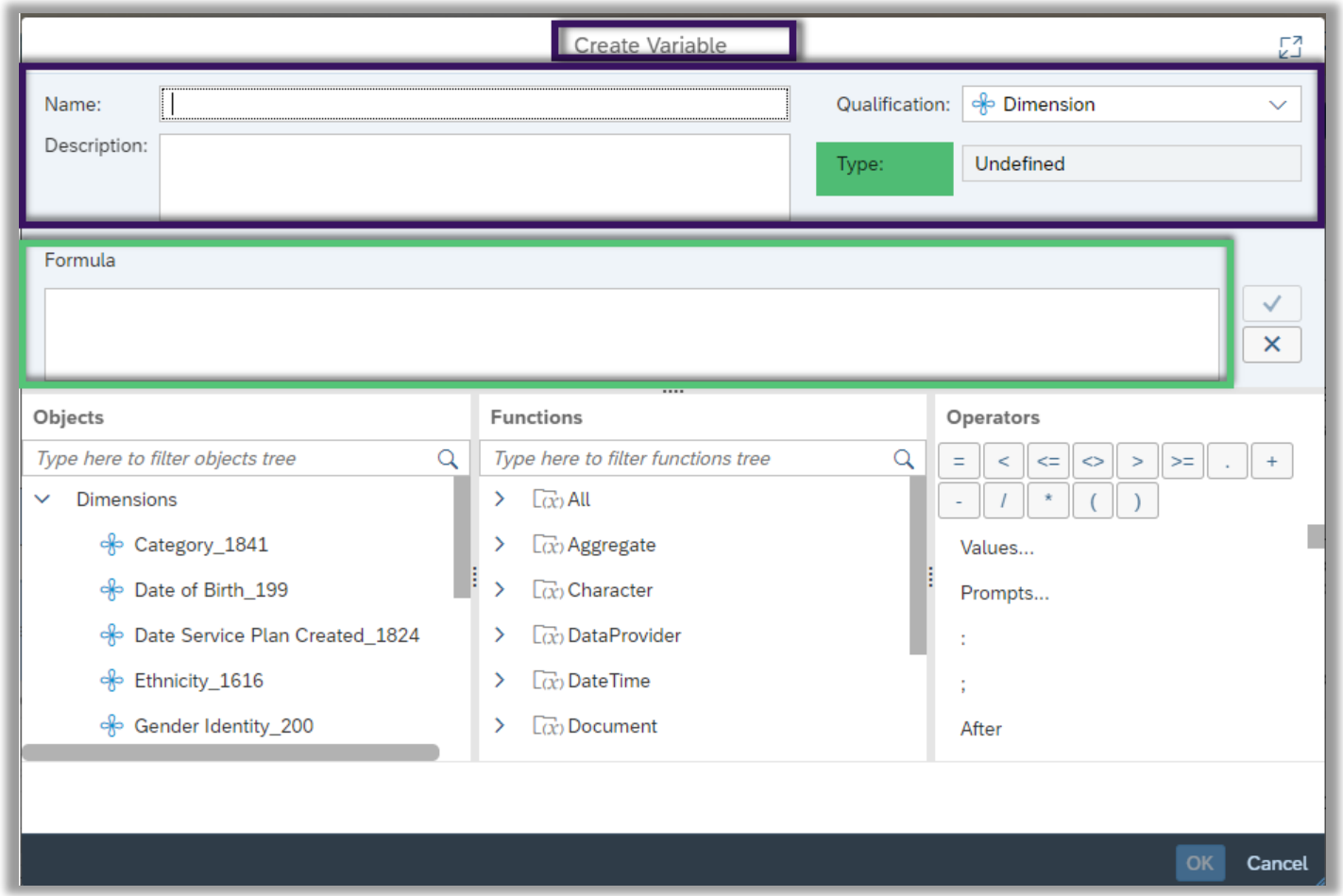
- Name
- Description
- Qualification
  - Dimension
  - Measure
  - Detail



Variable Editor

Four Components

- Name
- Description
- Qualification
- Type



Popular Advanced Formulas

Popular Formulas

Year (or Month, Day, etc)

- Allows for simple aggregation for time periods, which can be utilized in filtering or chart creation
- =Year([Date of Service])

Year	Count
2016	57
2017	147
2018	4
2020	2

Popular Formulas

Display Null Values with other Text

- Especially helpful for use in Input Controls, Report Filters, Summary Tables, and Charts

=If [Data Object]>="!" Then [Data Object] Else "Unanswered"

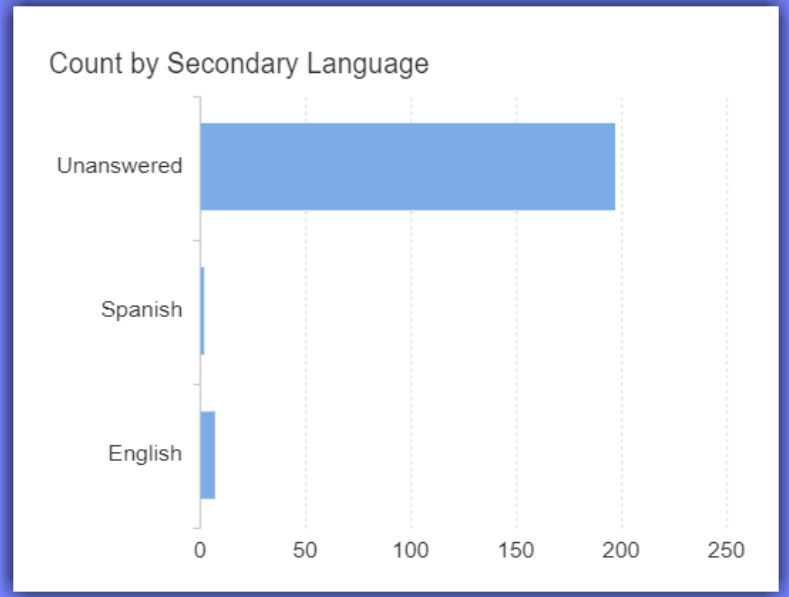
OR

=If IsNull([Data Object]) Then "Unanswered" Else [Data Object]

- >=! Formulas are relied on more in Apricot
- If IsNull Formulas are relied on more in ETO

Secondary Language_213	Secondary Language
	Unanswered
	Unanswered
	Unanswered
	Unanswered
	Unanswered
English	English
Spanish	Spanish
English	English
	Unanswered
	Unanswered
	Unanswered
Spanish	Spanish

Count	Secondary Language
7	English
2	Spanish
197	Unanswered



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Popular Formulas

Calculate Age based on Today's Date

- Revise name of Date of Birth field name in formula to match the Object in your report

=DatesBetween([Date of Birth];CurrentDate();YearPeriod)

DOB	Age
1/1/80	42
1/19/53	69
11/11/89	32
10/1/75	46
3/22/90	31
1/1/45	77
1/1/65	57
10/21/11	10
3/23/00	21
9/4/68	53

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

Build confidence and 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.

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