

Results: Report Filters Webinar

Meet Your Trainer

First Name Last Name

Training & Development Associate

Learning Objective

After completing this training, Report Writers will understand how to use Report Filters to adjust the data displayed by reports.

Agenda

Overview

Common Uses

Adding Report Filters

Managing Report Filters

Overview

Overview

- Filters data within select tables, charts, report tabs
- Applied to data after Query Filters
- Not visible to viewers
- No prompt – fixed values

Common Uses

Common Uses

Often used to review the same set of data for different groups of participants

Examples:

- Demographic value
- Roster/class
- Program

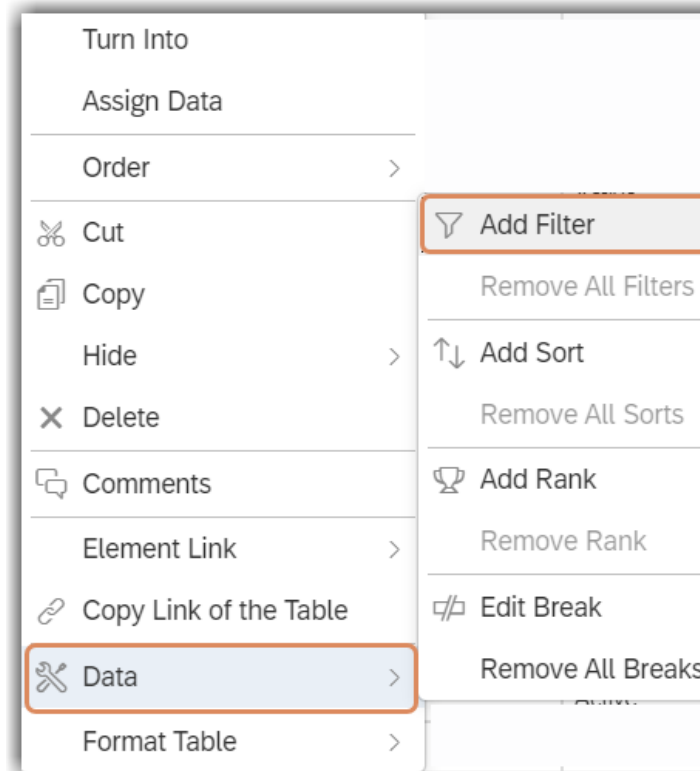
Adding Report Filters

Steps to Configure Report Filters

1. Select the area of the report where the filter will be applied, right-click, and go to Add Filter
2. Determine which object to filter on
3. Determine which value to filter by
4. Repeat Steps 2 & 3 to filter for any additional objects

Add Report Filters

Select the area of the report where the filter will be applied, right-click, and go to Add Filter




Add Report Filters



Drag a Data Object into the Filter panel

The screenshot displays a software interface with two main panels. The left panel, titled 'Block 1', contains a 'Filtered By' section with a dropdown menu set to 'Element Link'. Below this is a 'Filters' section with a plus icon and a list of filters. One filter, 'Goal Categ...', is highlighted with a red arrow. The right panel, titled 'Query 1', contains a list of data objects, each with a plus icon. The objects listed are: 'Date of Birth_199', 'Date of Service_1204', 'Goal Category_1815', 'Goal Status_1816', 'Goal_1812', and 'Goal(s) discussed_1845'. A red arrow points from the 'Goal Category_1815' object in the right panel to the 'Goal Categ...' filter in the left panel.




Add Report Filters

Select the value(s) to filter by

Select values for Goal Category_1815 (Query 1) 

Search or Manual Entry  

- Adult Education
- Children's Education
- Employment
- Family Relations
- Food
- Housing
- Income
- Legal
- Mental Health
- Mobility
- Substance Abuse

 1  

Add Report Filters

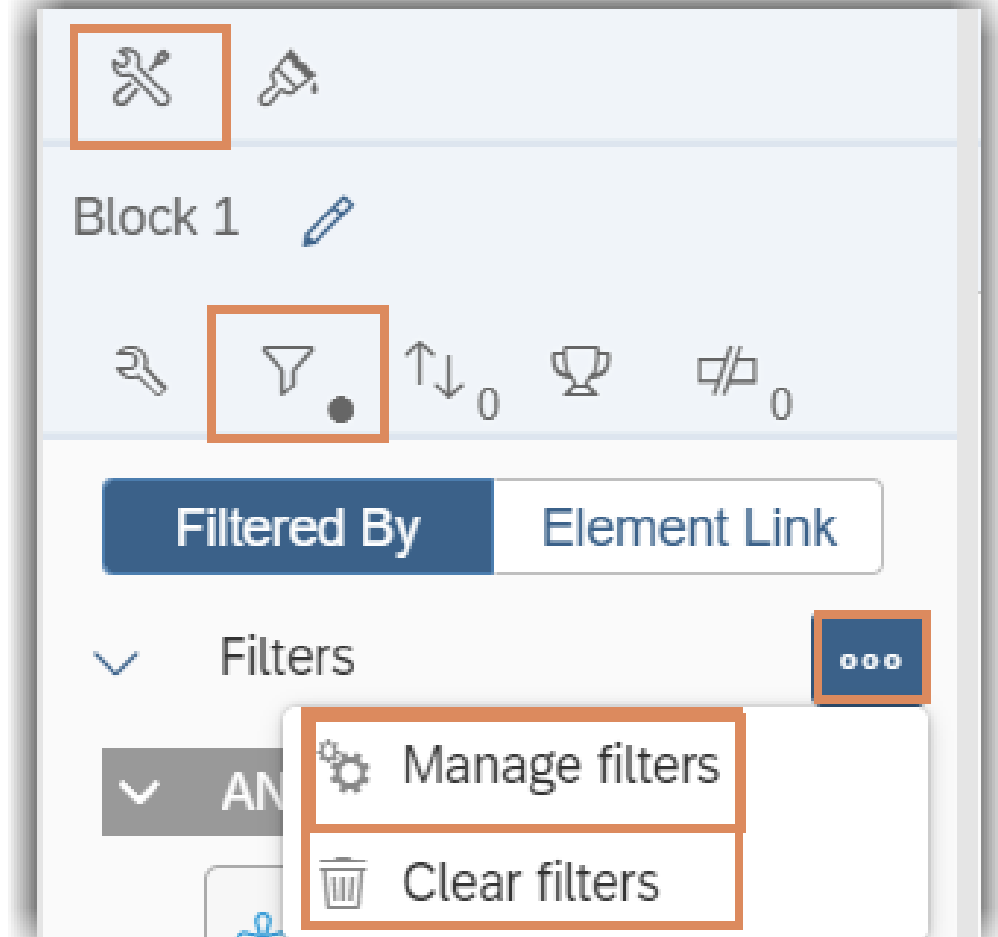
Repeat as needed

▼ Adult Education ▼ Mental Health ▼ Housing ▼

Managing Report Filters

Managing Report Filters

Click the '...' and select Manage or Clear



Managing Report Filters

From the Manage Page:

- Filter logic can be changed: AND/OR
- Filters may be Nested
- Filters can be deleted
- View where the filter is applied

The screenshot shows a 'Report Filter' dialog box. On the left, a tree view shows a hierarchy: 'AV Filtering Starter Report Sept 23' > 'Adult Education' > 'Vertical Table : Block 1'. A mouse cursor is over 'Vertical Table : Block 1'. The main area is titled 'Filter On Block 1' and contains a filter rule: 'Goal Category_1815 In List' with a dropdown arrow and 'Adult Education' with a delete icon. Below this, there are two panels: 'Available Values' and 'Selected Values'. The 'Available Values' panel has a search bar and a list of categories with checkboxes: 'Goal Category_1815' (checked), 'Adult Education' (checked), 'Children's Education', 'Employment', 'Family Relations', 'Food', 'Housing', and 'Income'. The 'Selected Values' panel shows 'Goal Category_1815 In List' and 'Adult Education' with a 'Clear Selection' link. At the bottom right, there are 'OK', 'Apply', and 'Cancel' buttons.

Additional Resources

Additional Training Opportunities

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



Build confidence and knowledge
in our software.

Training Survey

Please complete the survey:



We value your feedback!

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.