Building Reports with Multiple Forms: A Best Practice Guide

Welcome, we will start shortly!

Bonterra™

Meet Your Trainer

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Learning Objective

The goal for this session is to highlight common challenges when building reports with data from multiple forms and give you strategies to ensure your numbers are accurate for your needs.

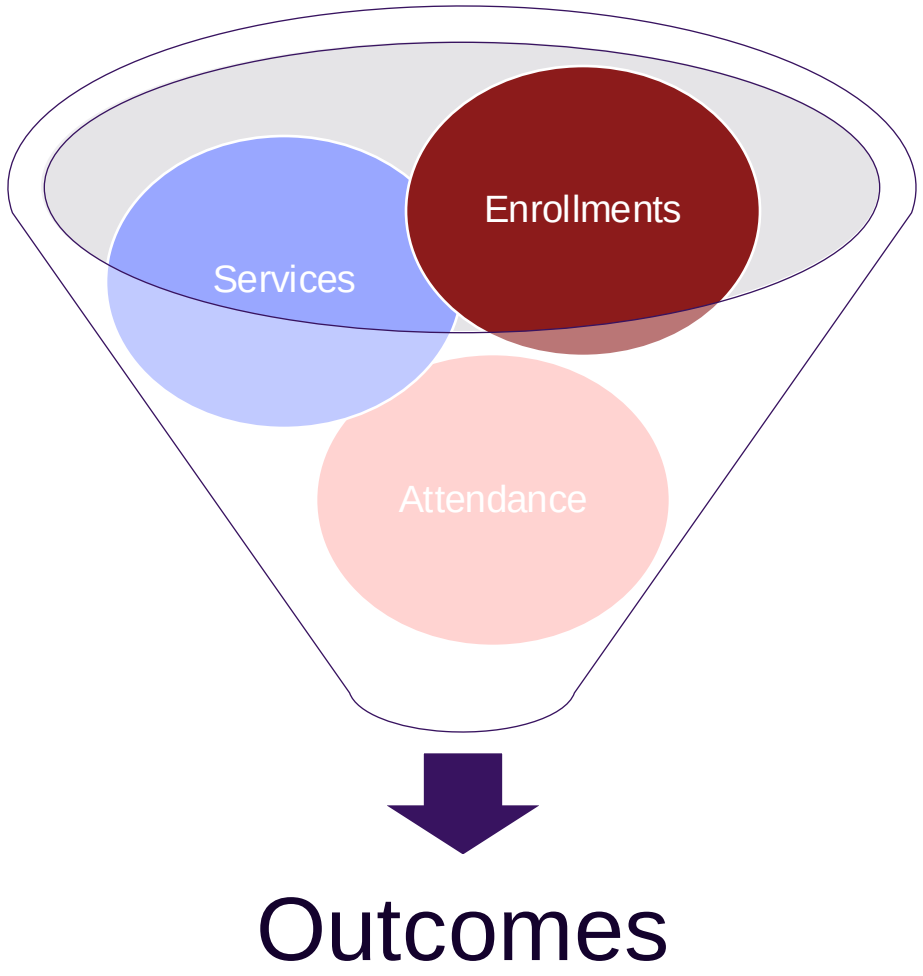
Agenda

- Situation
- Root Form
- Linking Relationships
- Limiting Records

Situation

Reporting on Multiple Forms

- How do you pull together data from different places in Apricot to yield accurate, combined reporting?
  - *Tier 1 Profiles, Tier 2 Enrollments / Services / Attendance / Assessments / Case Notes / etc.*
- Every additional form added to a report takes consideration.
- Need to avoid unexpected duplication or restriction of data.
- Important to know when to combine or separate.



Example Duplication

▾ Alonzo LaBatsille (456)

Row Count 14

Search | Displaying 14 of 14 Rows (Expand All Cells)

Participant	Enrollment Date	Program	Service Date	Service Type
Alonzo LaBatsille (456)	09/02/2016	Workforce Training	09/03/2016	Job Search Supports
Alonzo LaBatsille (456)	09/02/2016	Workforce Training	03/18/2016	Counseling - Group Session
Alonzo LaBatsille (456)	09/02/2016	Workforce Training	04/10/2016	Counseling - Group Session
Alonzo LaBatsille (456)	09/02/2016	Workforce Training	05/11/2016	Counseling - Group Session
Alonzo LaBatsille (456)	09/02/2016	Workforce Training	03/15/2017	Counseling - Individual Session
Alonzo LaBatsille (456)	09/02/2016	Workforce Tra		
Alonzo LaBatsille (456)	09/02/2016	Workforce Tra		
Alonzo LaBatsille (456)	02/23/2016	Counseling		
Alonzo LaBatsille (456)	02/23/2016	Counseling		
Alonzo LaBatsille (456)	02/23/2016	Counseling		
Alonzo LaBatsille (456)	02/23/2016	Counseling		
Alonzo LaBatsille (456)	02/23/2016	Counseling		
Alonzo LaBatsille (456)	02/23/2016	Counseling		
Alonzo LaBatsille (456)	02/23/2016	Counseling		

One set of Services listed twice because there are two Program Enrollments.

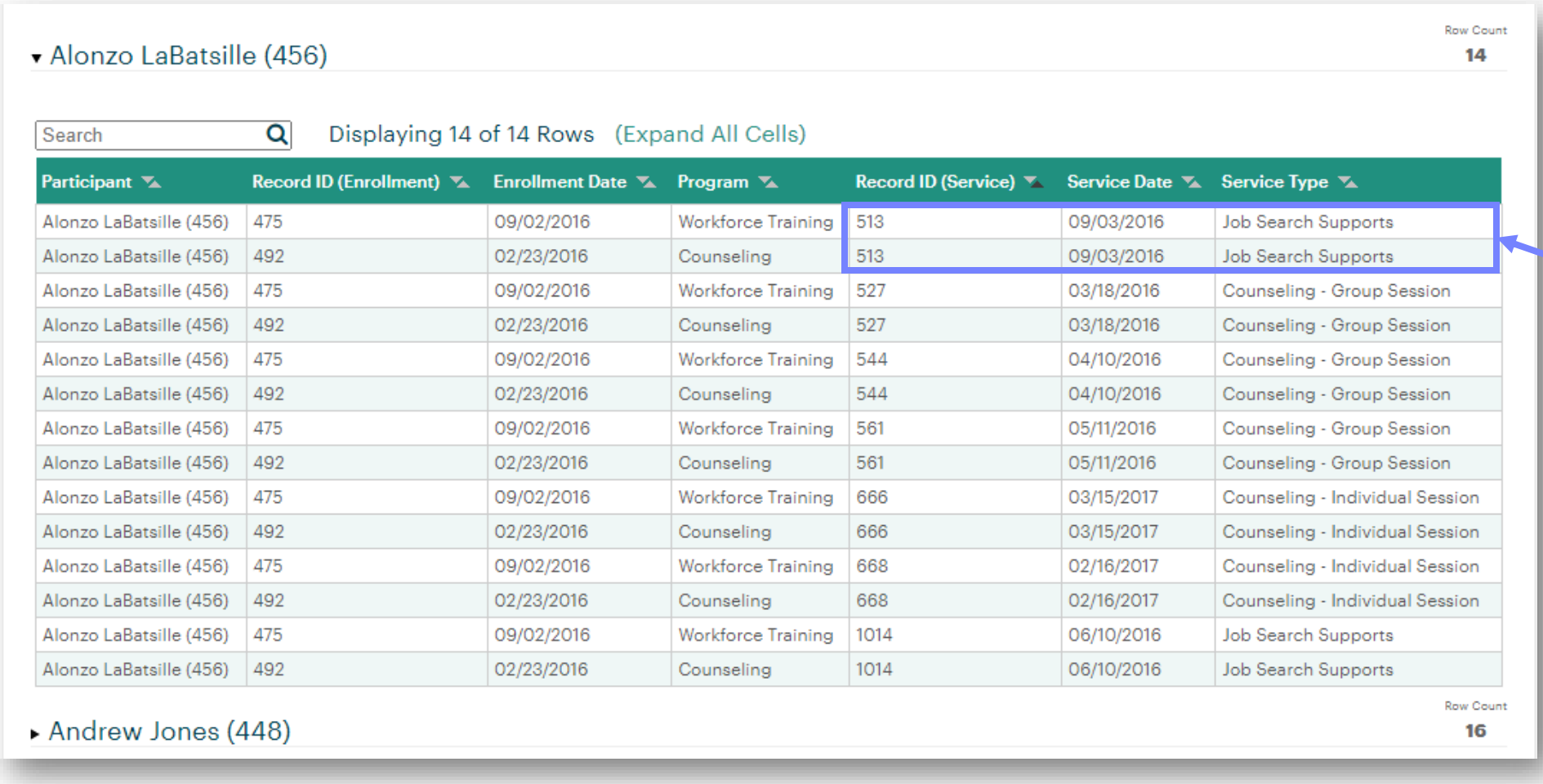
Search | Displaying 7 of 7 Rows (Expand All Cells)

Participants	Enrollment Date	Program	Service Date	Service Type
Alonzo LaBatsille (456)	09/02/2016	Workforce Training	09/03/2016	Job Search Supports
Alonzo LaBatsille (456)	09/02/2016	Workforce Training	06/10/2016	Job Search Supports
Alonzo LaBatsille (456)	02/23/2016	Counseling	03/18/2016	Counseling - Group Session
Alonzo LaBatsille (456)	02/23/2016	Counseling	04/10/2016	Counseling - Group Session
Alonzo LaBatsille (456)	02/23/2016	Counseling	05/11/2016	Counseling - Group Session
Alonzo LaBatsille (456)	02/23/2016	Counseling	03/15/2017	Counseling - Individual Session
Alonzo LaBatsille (456)	02/23/2016	Counseling	02/16/2017	Counseling - Individual Session

Services unduplicated and linked to correct Program Enrollment.

Total Rows 7

Identifying Inaccurate Reports



▾ Alonzo LaBatsille (456)

Row Count 14

Search

Displaying 14 of 14 Rows (Expand All Cells)

Participant	Record ID (Enrollment)	Enrollment Date	Program	Record ID (Service)	Service Date	Service Type
Alonzo LaBatsille (456)	475	09/02/2016	Workforce Training	513	09/03/2016	Job Search Supports
Alonzo LaBatsille (456)	492	02/23/2016	Counseling	513	09/03/2016	Job Search Supports
Alonzo LaBatsille (456)	475	09/02/2016	Workforce Training	527	03/18/2016	Counseling - Group Session
Alonzo LaBatsille (456)	492	02/23/2016	Counseling	527	03/18/2016	Counseling - Group Session
Alonzo LaBatsille (456)	475	09/02/2016	Workforce Training	544	04/10/2016	Counseling - Group Session
Alonzo LaBatsille (456)	492	02/23/2016	Counseling	544	04/10/2016	Counseling - Group Session
Alonzo LaBatsille (456)	475	09/02/2016	Workforce Training	561	05/11/2016	Counseling - Group Session
Alonzo LaBatsille (456)	492	02/23/2016	Counseling	561	05/11/2016	Counseling - Group Session
Alonzo LaBatsille (456)	475	09/02/2016	Workforce Training	666	03/15/2017	Counseling - Individual Session
Alonzo LaBatsille (456)	492	02/23/2016	Counseling	666	03/15/2017	Counseling - Individual Session
Alonzo LaBatsille (456)	475	09/02/2016	Workforce Training	668	02/16/2017	Counseling - Individual Session
Alonzo LaBatsille (456)	492	02/23/2016	Counseling	668	02/16/2017	Counseling - Individual Session
Alonzo LaBatsille (456)	475	09/02/2016	Workforce Training	1014	06/10/2016	Job Search Supports
Alonzo LaBatsille (456)	492	02/23/2016	Counseling	1014	06/10/2016	Job Search Supports

Row Count 16

▸ Andrew Jones (448)

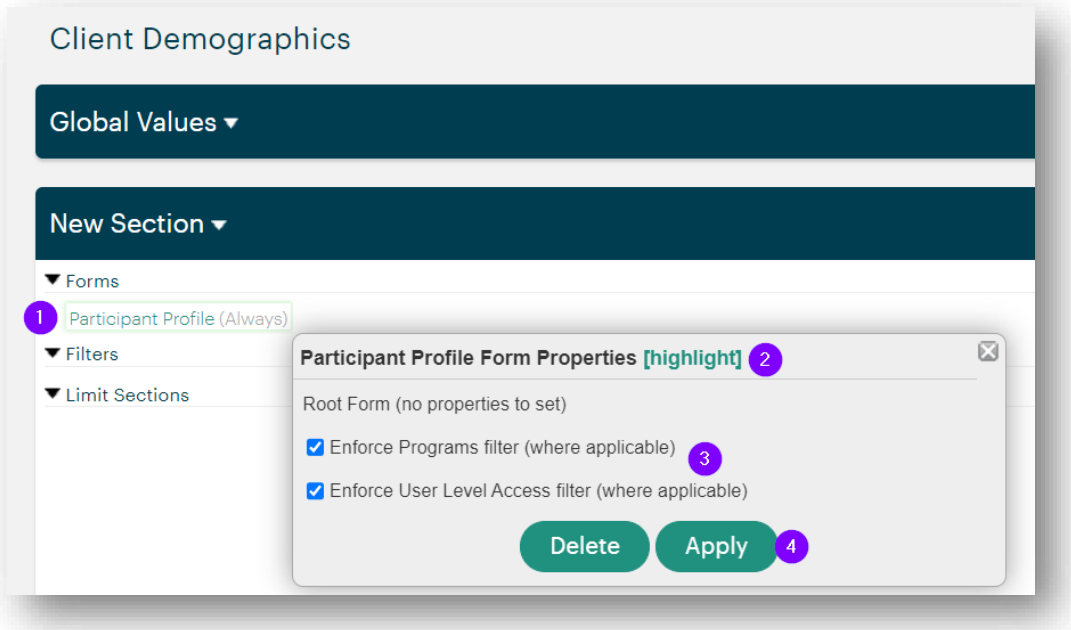
Root Form

Root Form

- Based on first data point pulled into a report.
- Should be top of the chain, what everything relates back to.
- Cannot be changed once selected without rebuilding.

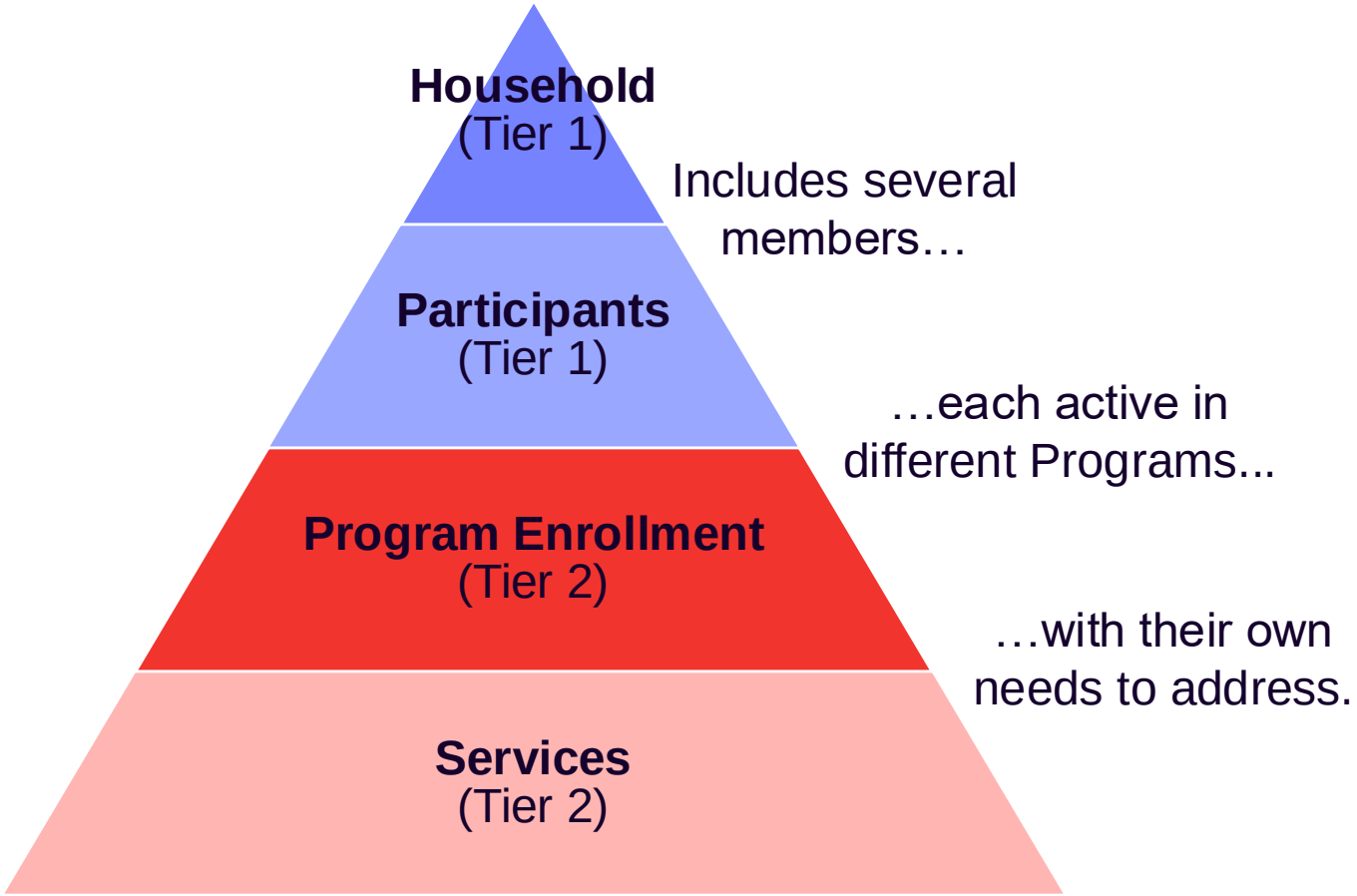
Best Practice: Always start with Tier 1.

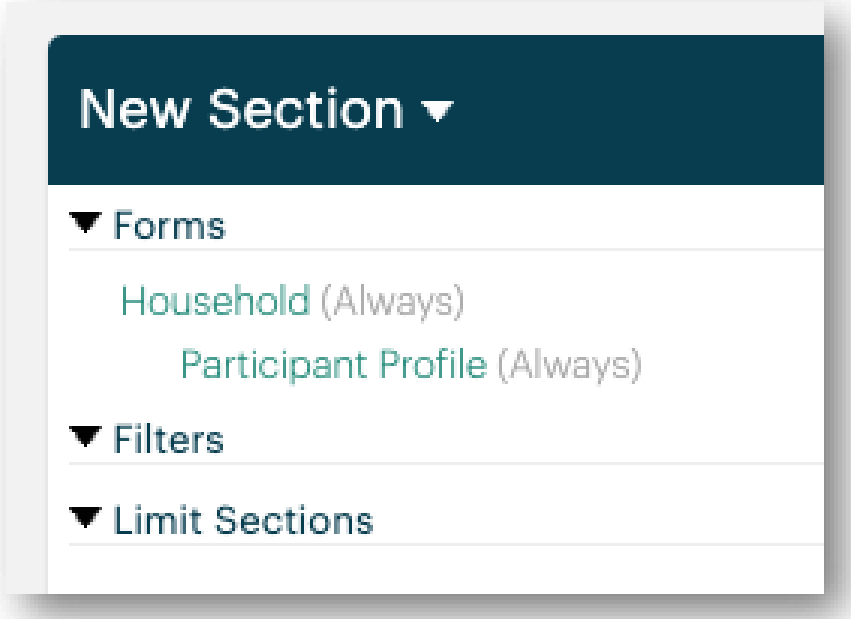
Tip: Use Tier 1 **Record ID** and select **“With Identifier Field(s)”** to show record name field.



Root Form

- When working with multiple related Tier 1s, start at the top.





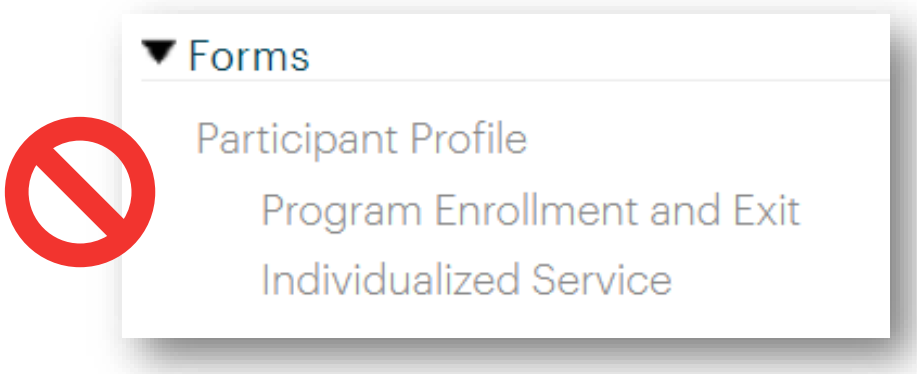
Tip: Only include minimum forms for your reporting needs.

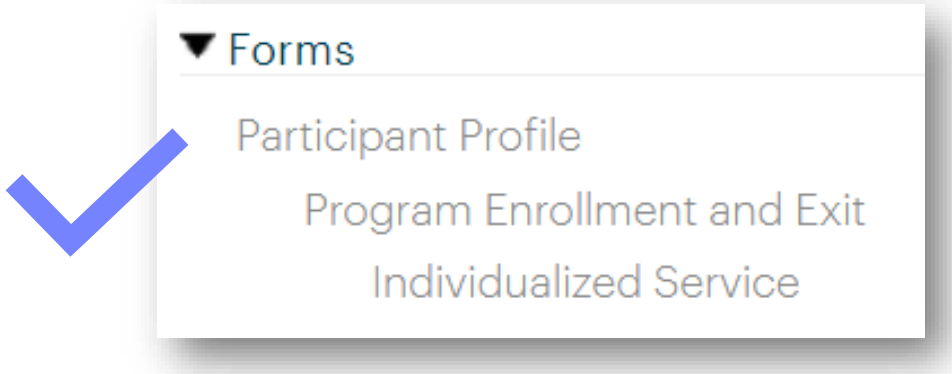
Linking Relationships

Linking Relationships

- One of the most common causes of **duplication** in reporting is pulling in multiple Tier 2 forms without telling Apricot which link to reference (Tier 1 is the default).
- Can also be caused by **missing a link** that associates related records.
- Apricot will not let you build a report with completed unrelated forms.

Best Practice: Use linking with related Tier 2s to keep reporting accurate.





Linked Tier 2s

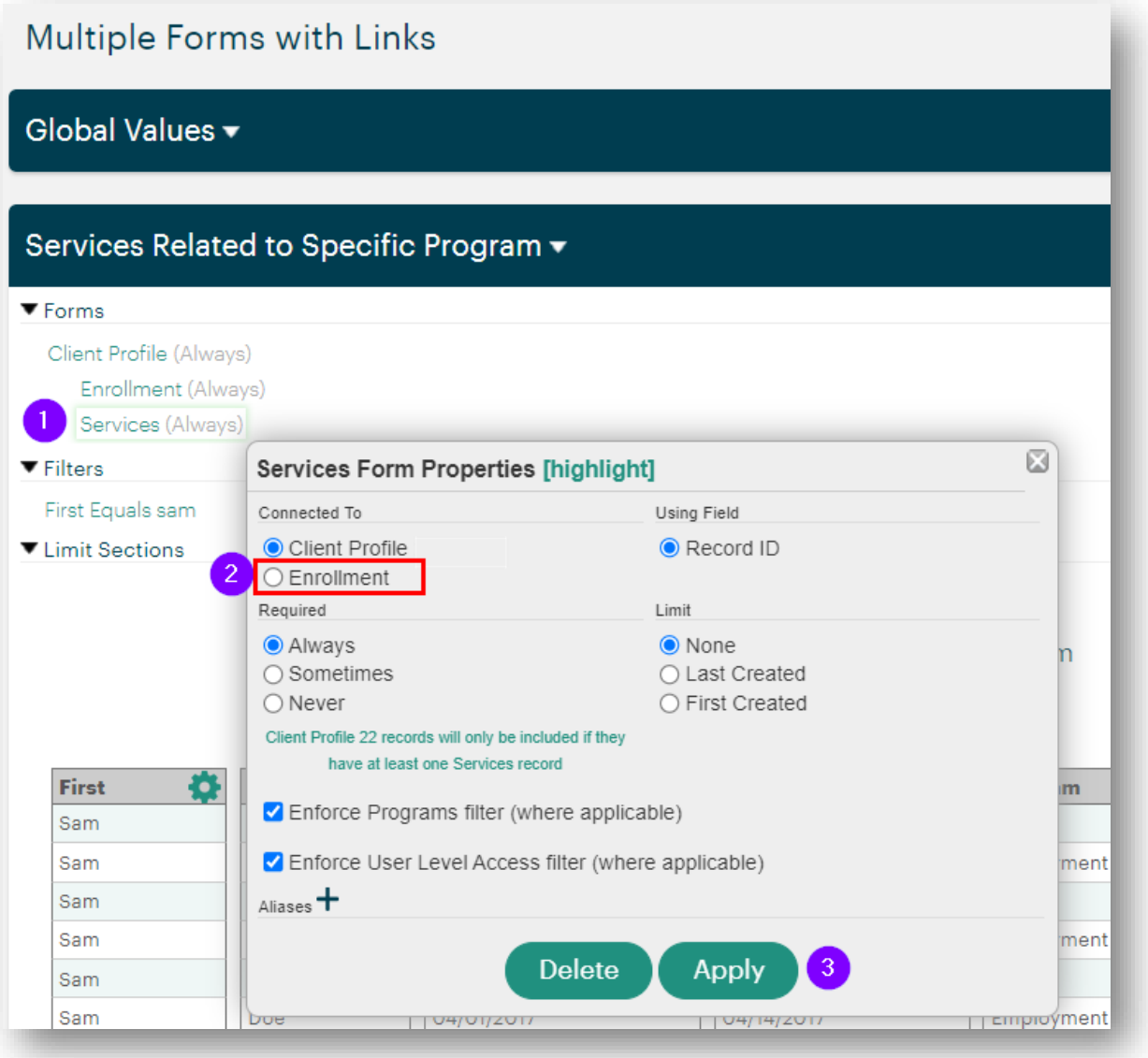
Step 1: Pull in data from Tier 1.

Step 2: Pull in data from two related Tier 2s.

Step 3: Click on Tier 2 Form to Specify Link.

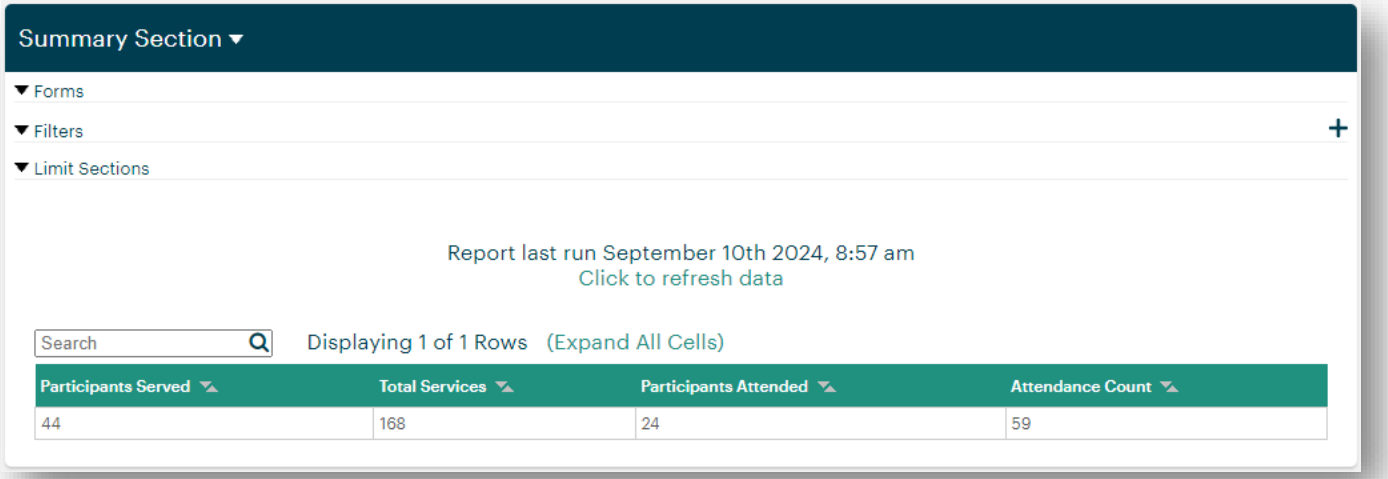
Step 4: Update “Connected To” Field.

Step 5: Publish to Refresh.



Separate Sections

- It's common to need **multiple Sections** for one report.
- You cannot pull **unrelated forms** into the same Section (i.e. Tier 1s or Tier 2s from separate Tier 1s).
- If 2 or more Tier 2 forms under the same Tier 1 are not linked, they **shouldn't be combined** in one Section.
- Create separate Sections & combine with a **Summary Section**.



Limiting Records

Limiting Records

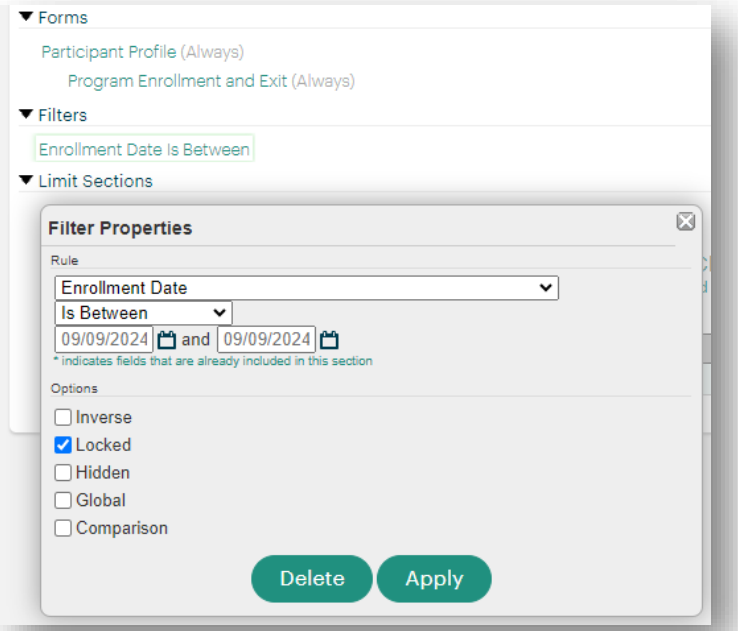
- Options to focus reporting on desired data.
- Need to avoid unintended restriction.

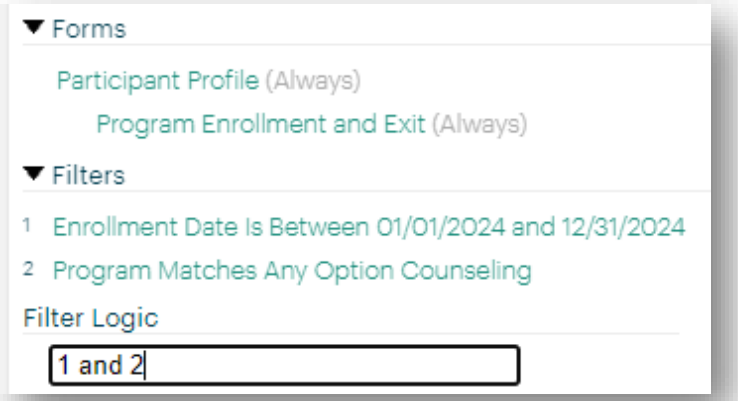
Report Filters

- Narrow down included records based on different datapoints.

Tips & Tricks:

- Use **Global Filters** with multi-section reports.
- Use "**Searchable**" setting for common filters.
- Apply **Filter Logic** for more advanced filtering.
- **Inverse Filter** gives you everything but "xyz."
- **Group Filters** apply to Grouped data.
- **Comparison Filters** work on to like datapoints.





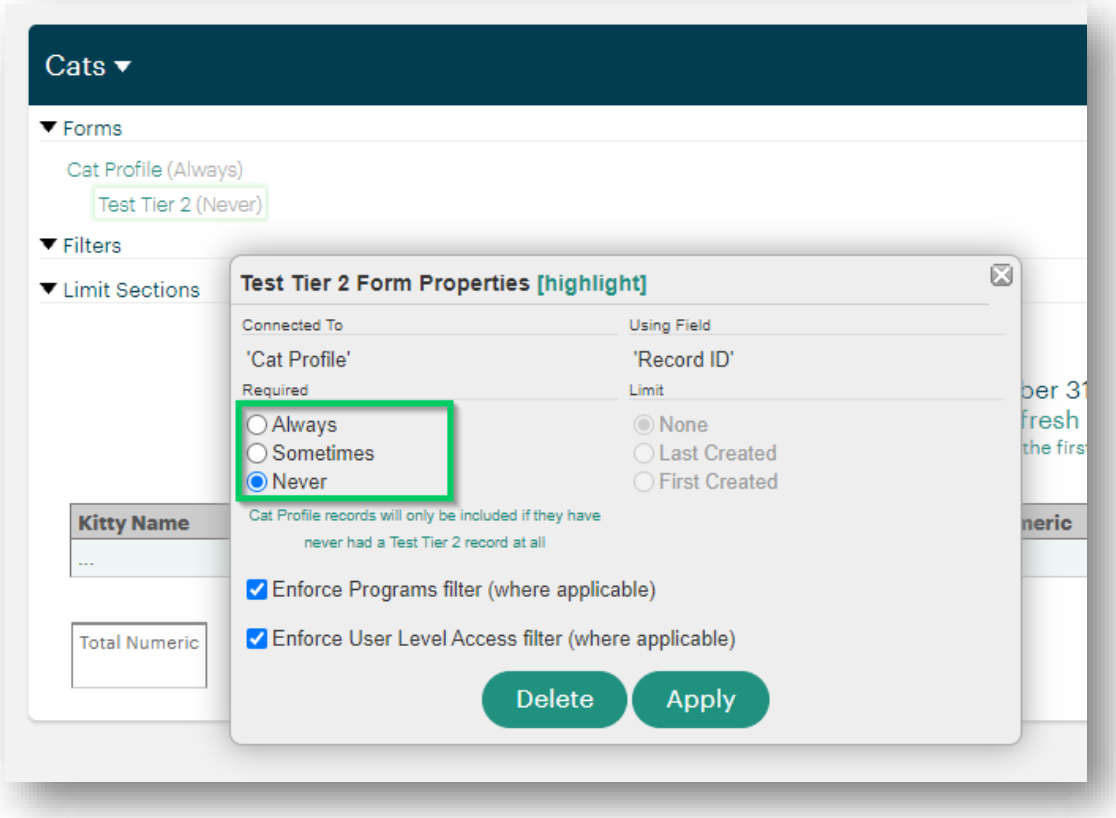
Required

- Option to choose which records from Secondary forms are included in the report.
- Good way to see completed vs. missing data.

Always – Like a filter that only pulls records where both Root & Secondary are filled out.

Sometimes – Pulls all records for Root form whether or not Secondary has been filled out.

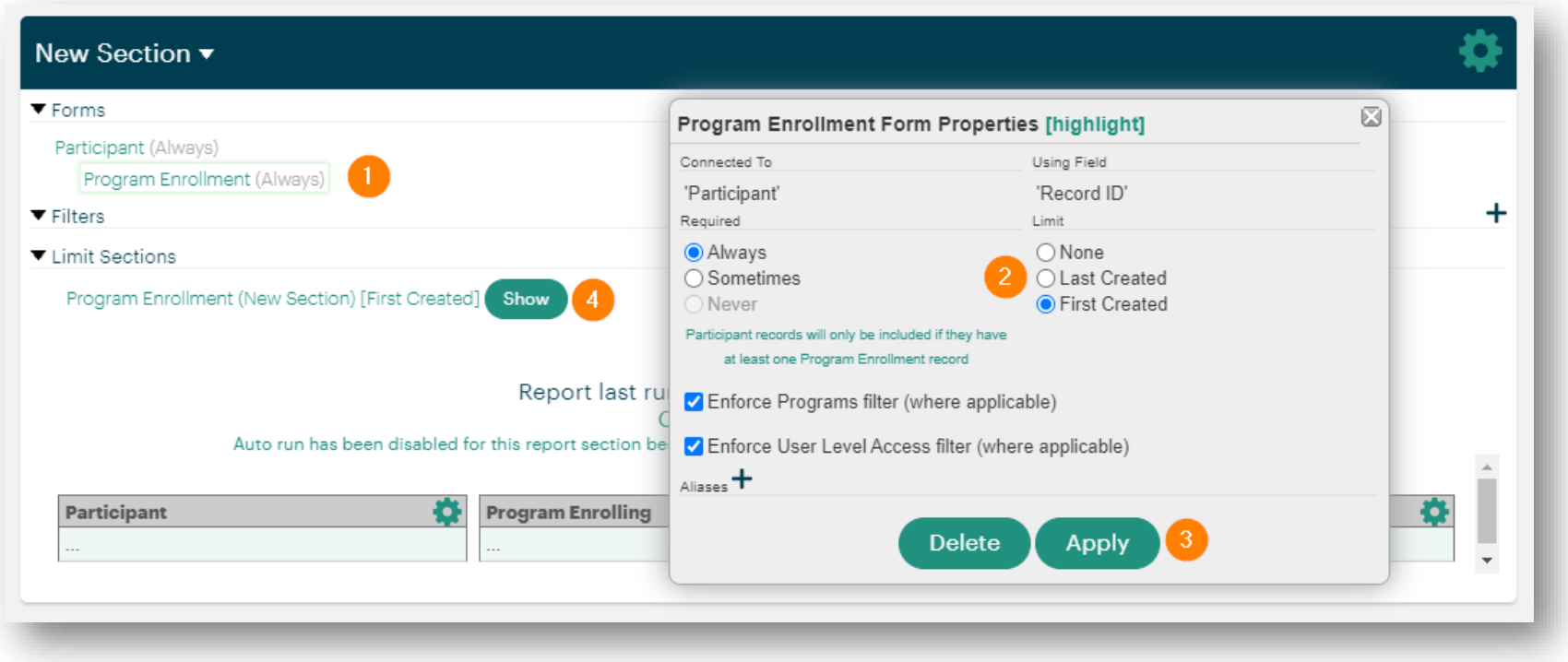
Never – Like a filter that only pulls in Root form records that do not have Secondary filled out.



Limits

- Option to restrict Secondary form records to just one per (based on Creation Date).

- **Last Created**
- **First Created**



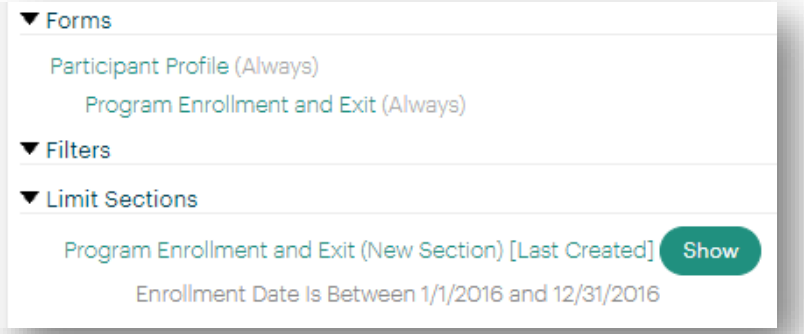
Tip: Does not work well with imported records where Creation Date is all the same.

Limits & Filters

- When using Limits, where you apply the filter matters.

Option 1: Filter Before Limit

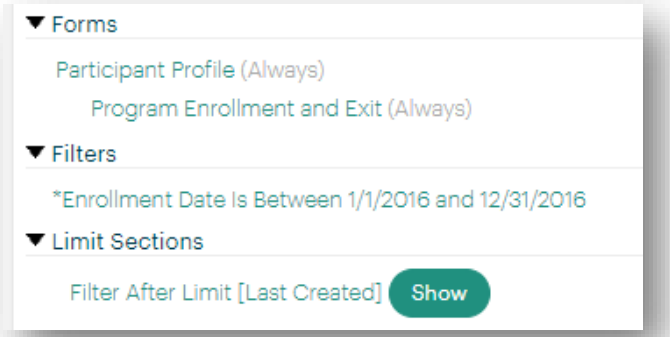
- *First / Last record THAT falls within filter.*
- Add filter within the Limit section.



Ex: Show me the most recent Service Participants received in this timeframe.

Option 2: Filter After Limit

- *First / Last record IF it falls within filter.*
- Add filter within the Main section.



Ex: Show me Participants only if their most recent Service happened in this timeframe.

Additional Resources

Additional Training Opportunities

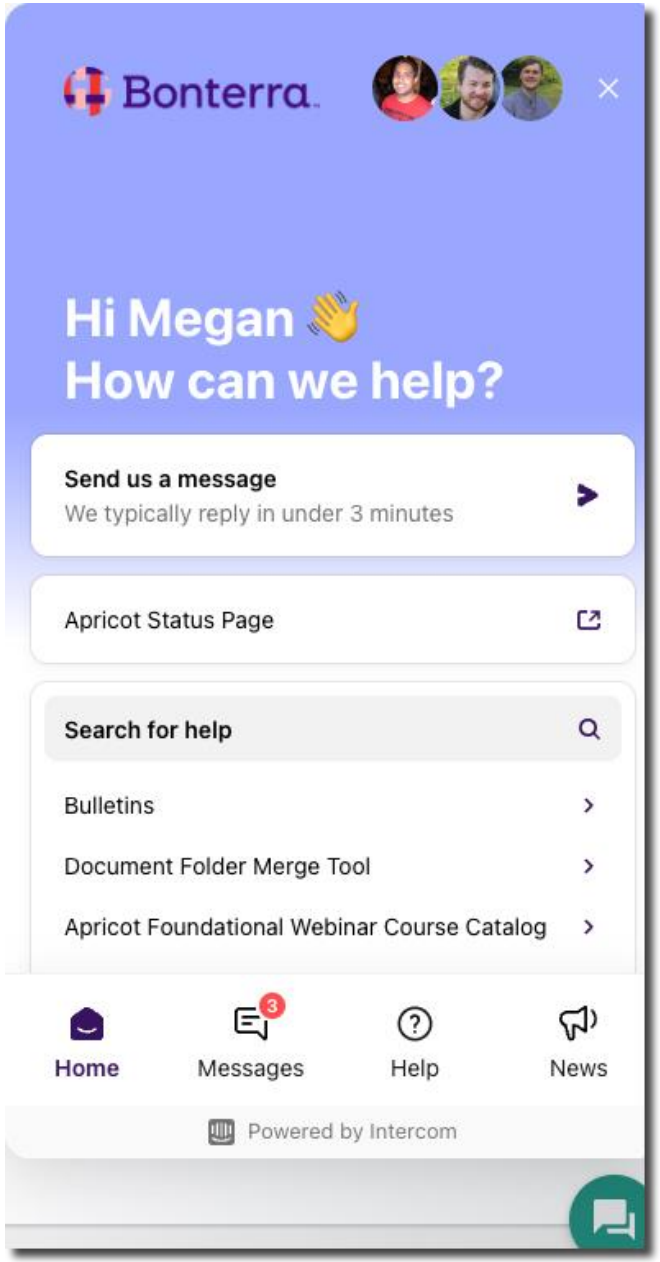
- Knowledge Base – How-To Articles (Search Chat or Visit Online)
- Bonterra Academy – Free Webinars & Recordings
- Foundations – Intensive, Multiday Courses to Cover Admin Basics
- Admin Labs – 2 Hour Live Trainings on Specific Capabilities
- Private Training – 1:1 Sessions with Training Expert in Your 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.

Bonterra™