

Building Reports with Multiple Forms: A Best Practice Guide

Welcome, we will start shortly!



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

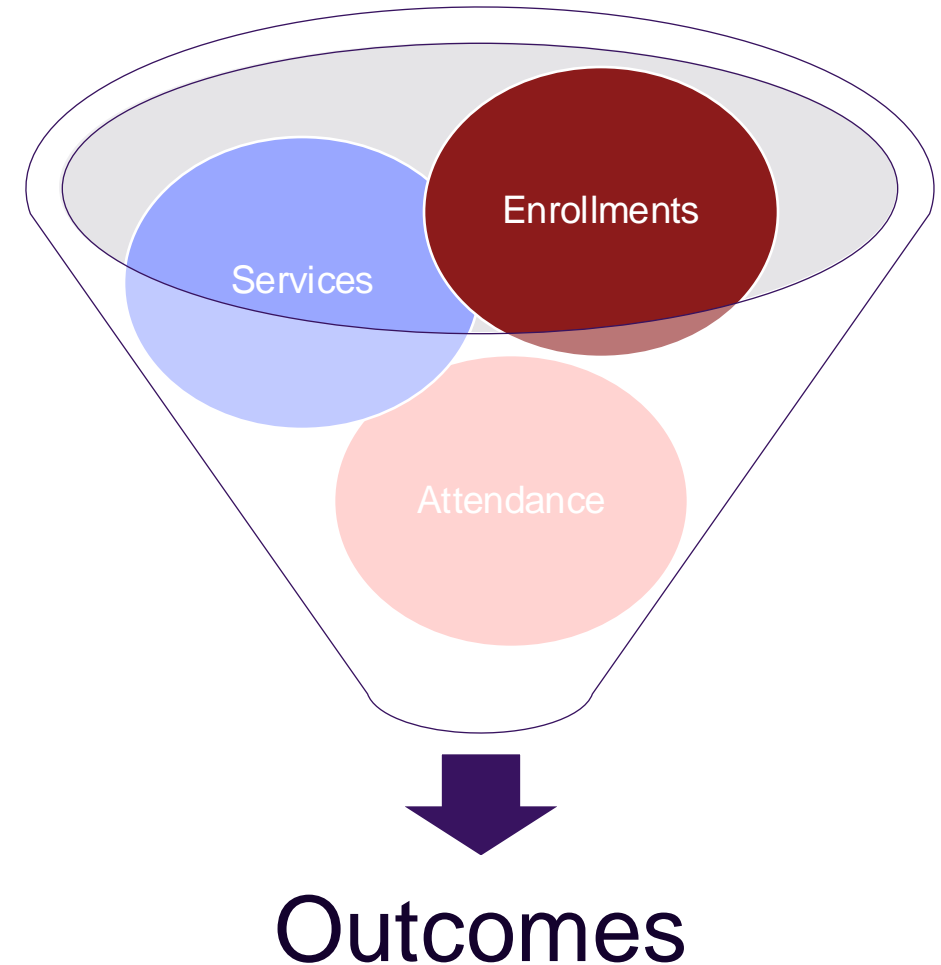
Linking Relationships

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 Q 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 Training		
Alonzo LaBatsille (456)	09/02/2016	Workforce Training		
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 Q 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

► Andrew Jones (448) Row Count
16

Field Choices ▼

- Special Columns
- Participant Profile
 - Program Enrollment and Exit
 - ▼ Individualized Service
 - Service Information
 - Insurance Information
 - ▼ System Fields
 - Record ID
 - Created By
 - Creation Date
 - Modified By
 - Modification Date
 - Assigned Programs

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.

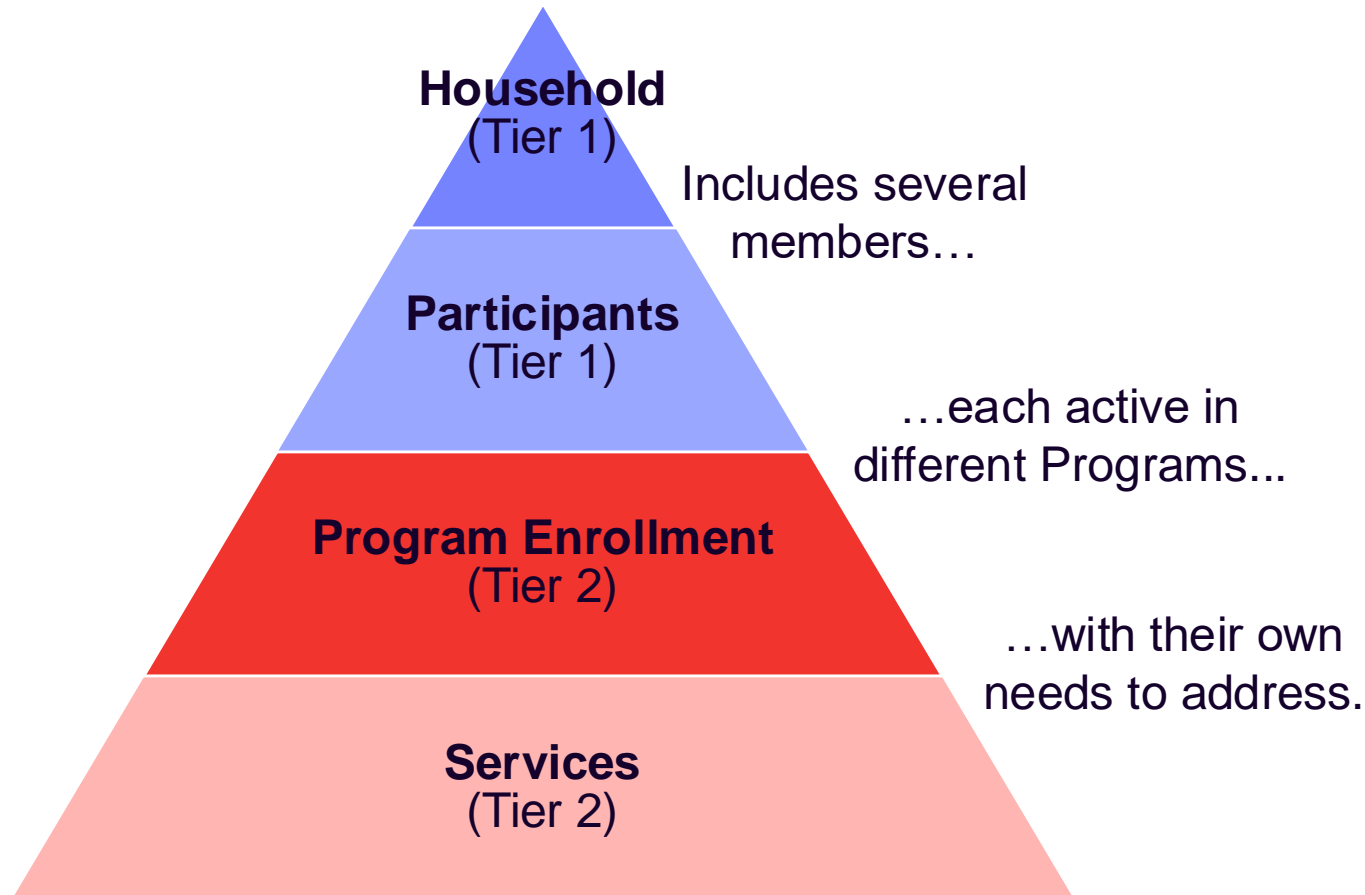
Best Practice: Always start with Tier 1.

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

The screenshot shows the 'Client Demographics' interface. The 'Forms' section is expanded, and 'Participant Profile (Always)' is selected. A modal window titled 'Participant Profile Form Properties [highlight]' is open, showing the 'Root Form (no properties to set)' and two checked options: 'Enforce Programs filter (where applicable)' and 'Enforce User Level Access filter (where applicable)'. The modal includes 'Delete' and 'Apply' buttons.

Root Form

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



New Section ▼

▼ Forms

Household (Always)

Participant Profile (Always)

▼ Filters

▼ Limit Sections

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.



▼ Forms

Participant Profile

Program Enrollment and Exit

Individualized Service



▼ Forms

Participant Profile

Program Enrollment and Exit

Individualized Service

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.

Multiple Forms with Links

Global Values ▾

Services Related to Specific Program ▾

▼ Forms

- Client Profile (Always)
- Enrollment (Always)
- 1 Services (Always)

▼ Filters

- First Equals sam

▼ Limit Sections

2

Services Form Properties [highlight]

Connected To: Client Profile Enrollment

Using Field: Record ID

Required: Always Sometimes Never

Limit: None Last Created First Created

Client Profile 22 records will only be included if they have at least one Services record

Enforce Programs filter (where applicable)

Enforce User Level Access filter (where applicable)

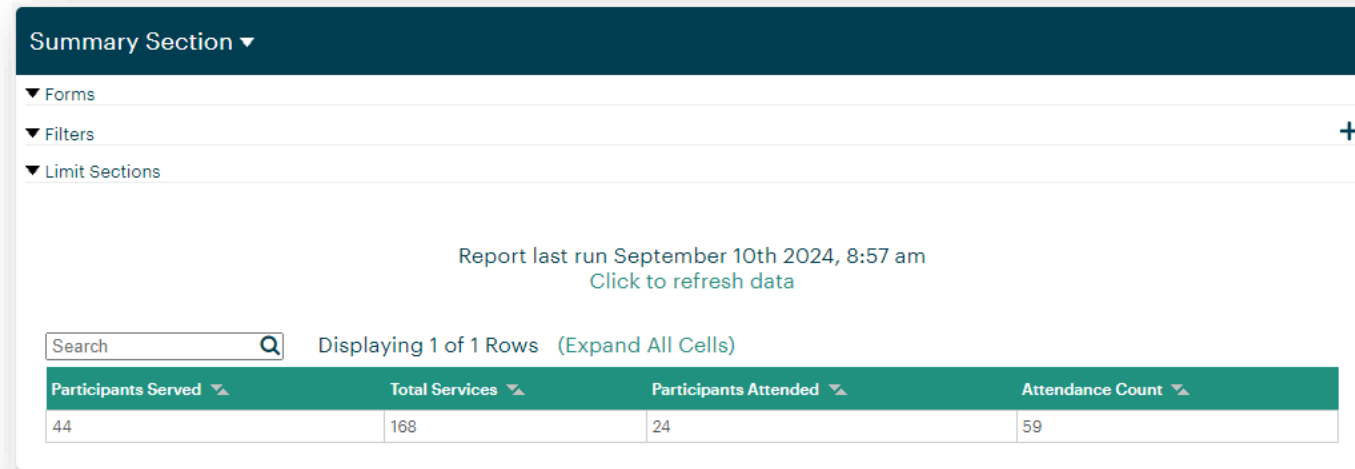
Aliases +

Delete Apply 3

First
Sam
Sam
Sam
Sam
Sam
Sam
Sam

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**.



The screenshot displays a report interface with a dark teal header labeled "Summary Section". Below the header are three expandable sections: "Forms", "Filters", and "Limit Sections". A plus sign is visible to the right of the "Filters" section. The main content area contains the text "Report last run September 10th 2024, 8:57 am" and a link "Click to refresh data". Below this is a search bar and the text "Displaying 1 of 1 Rows (Expand All Cells)". A table with a teal header and one data row is shown. The table columns are "Participants Served", "Total Services", "Participants Attended", and "Attendance Count". The data row contains the values 44, 168, 24, and 59 respectively.

Participants Served	Total Services	Participants Attended	Attendance Count
44	168	24	59

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.

The screenshot shows a 'Filter Properties' dialog box. The 'Rule' section is set to 'Enrollment Date' with the operator 'Is Between' and the values '09/09/2024' and '09/09/2024'. Below this, there are checkboxes for 'Inverse', 'Locked' (which is checked), 'Hidden', 'Global', and 'Comparison'. At the bottom right, there are 'Delete' and 'Apply' buttons. The background shows a partial view of a report structure with sections for 'Forms' and 'Filters'.

The screenshot shows the 'Filter Logic' configuration in a report. It lists two filters: '1 Enrollment Date Is Between 01/01/2024 and 12/31/2024' and '2 Program Matches Any Option Counseling'. Below the list, there is a 'Filter Logic' section with a text input field containing '1 and 2'.

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.

The screenshot shows a software interface for 'Cats' with a modal dialog titled 'Test Tier 2 Form Properties [highlight]'. The dialog is open over a background interface showing 'Forms' (Cat Profile (Always), Test Tier 2 (Never)), 'Filters', and 'Limit Sections'. The modal dialog contains the following information:

Connected To	Using Field
'Cat Profile'	'Record ID'

Required

Always
 Sometimes
 Never

Limit

None
 Last Created
 First Created

Cat Profile records will only be included if they have never had a Test Tier 2 record at all

Enforce Programs filter (where applicable)
 Enforce User Level Access filter (where applicable)

Buttons: Delete, Apply

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.

The screenshot displays a software interface for configuring form properties. The background shows a 'New Section' dropdown menu with sections for 'Forms', 'Filters', and 'Limit Sections'. The 'Forms' section includes 'Participant (Always)' and 'Program Enrollment (Always)'. The 'Limit Sections' section includes 'Program Enrollment (New Section) [First Created]'. A modal window titled 'Program Enrollment Form Properties [highlight]' is open, showing configuration for the 'Participant' form. The modal includes options for 'Required' (Always, Sometimes, Never) and 'Limit' (None, Last Created, First Created). The 'First Created' limit is selected. There are also checkboxes for 'Enforce Programs filter (where applicable)' and 'Enforce User Level Access filter (where applicable)'. Buttons for 'Delete' and 'Apply' are at the bottom of the modal. Orange callout numbers 1, 2, 3, and 4 highlight specific elements: 1 points to 'Program Enrollment (Always)', 2 to the 'Limit' section, 3 to the 'Apply' button, and 4 to the 'Show' button for 'Program Enrollment (New Section) [First Created]'.

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.

▼ Forms

Participant Profile (Always)
Program Enrollment and Exit (Always)

▼ Filters

▼ Limit Sections

Program Enrollment and Exit (New Section) [Last Created] Show

Enrollment Date Is Between 1/1/2016 and 12/31/2016

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.

▼ Forms

Participant Profile (Always)
Program Enrollment and Exit (Always)

▼ Filters

*Enrollment Date Is Between 1/1/2016 and 12/31/2016

▼ Limit Sections

Filter After Limit [Last Created] Show

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)

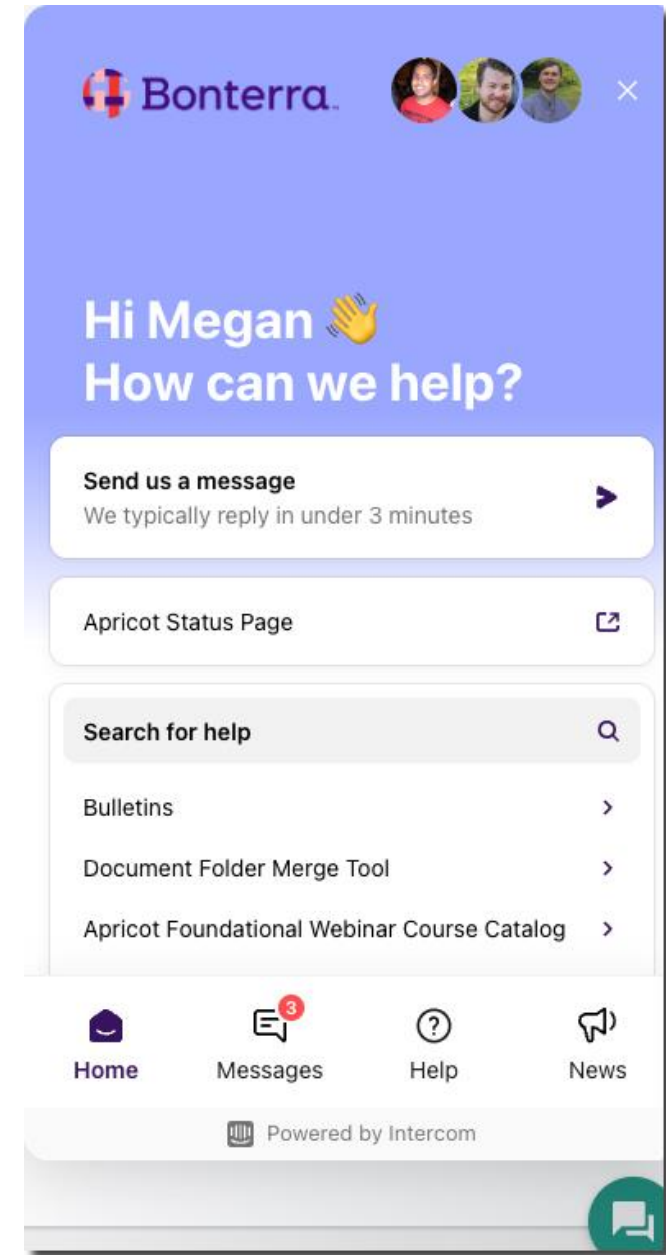


Build confidence & knowledge in
our software!

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.