Apricot Designing Forms for Effective Reporting: A Best Practice Guide

Bonterra™

Meet Your Trainer

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Training & Development Associate

Learning Objective

Help Administrators understand how the report builder in Apricot interacts with various field choices in the Form Design tool so that they can make informed decisions when designing or modifying forms.

Agenda

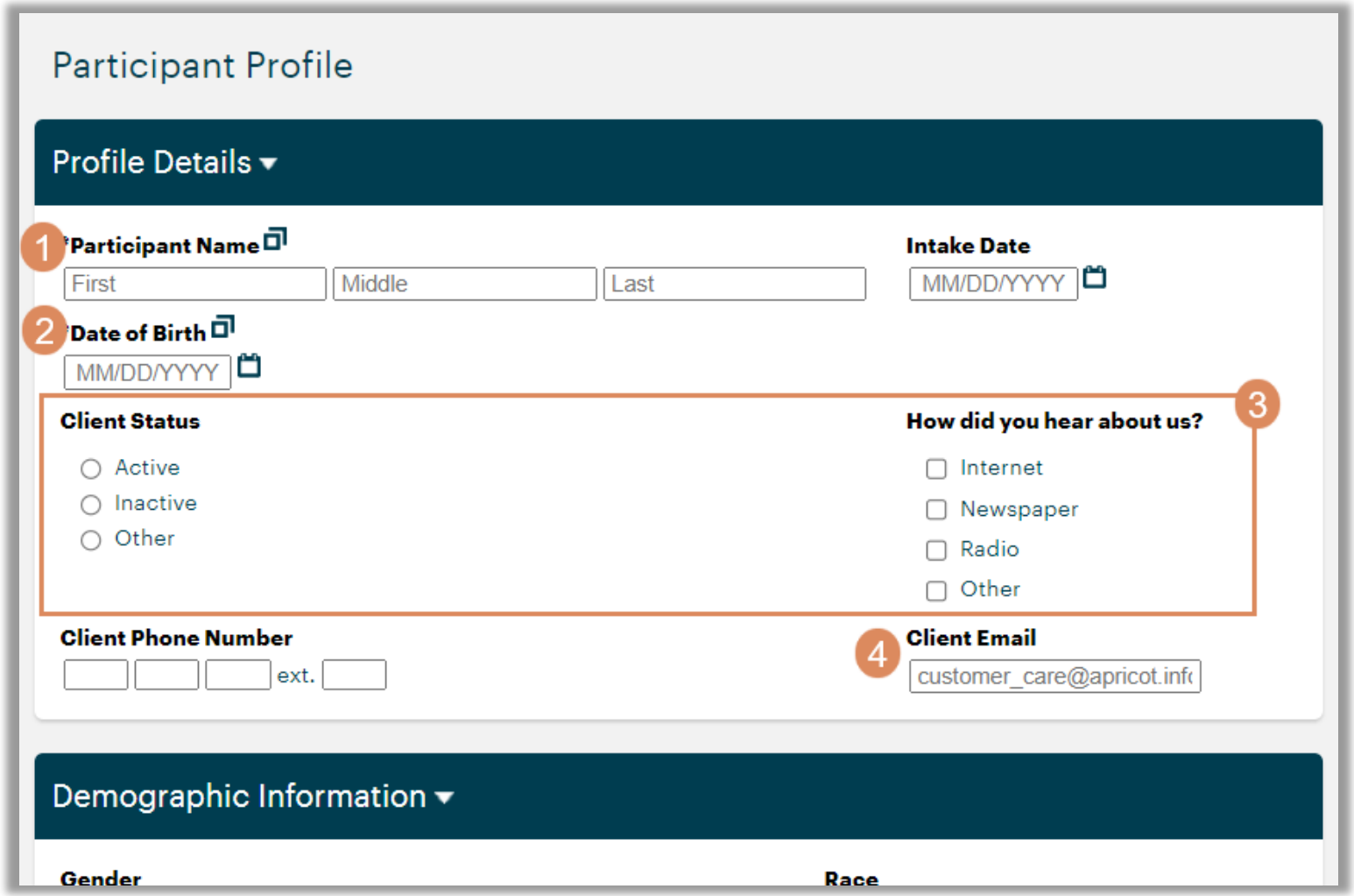
- Overview of Field Choices
- Report Builder Expected Behavior
- Best Practices

Overview of Field Choices

Field Choices

Field Choice Categories

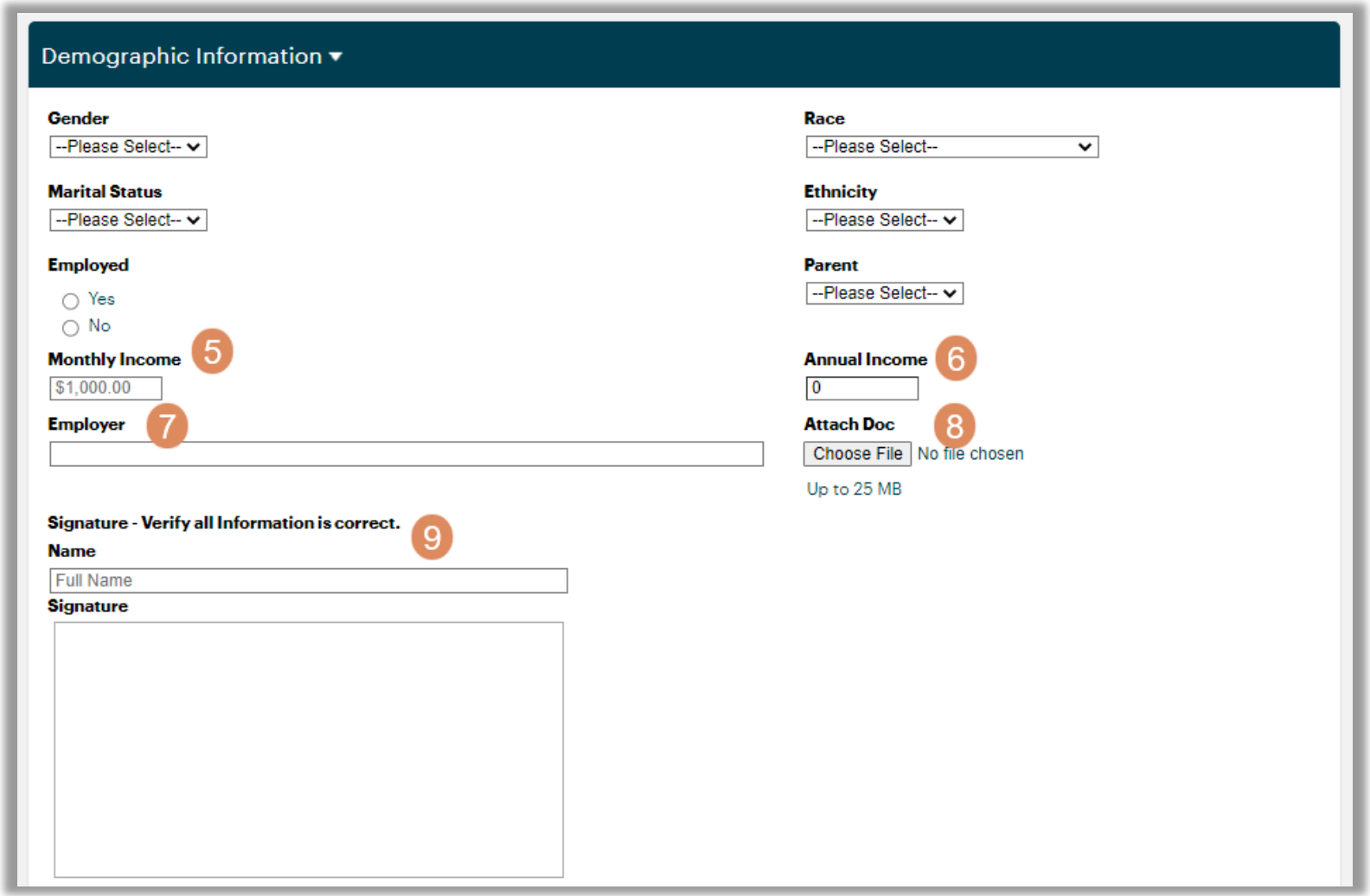
1. Demographic
2. Date and Time
3. Option
4. Hyperlink



Field Choices

Field Choice Categories

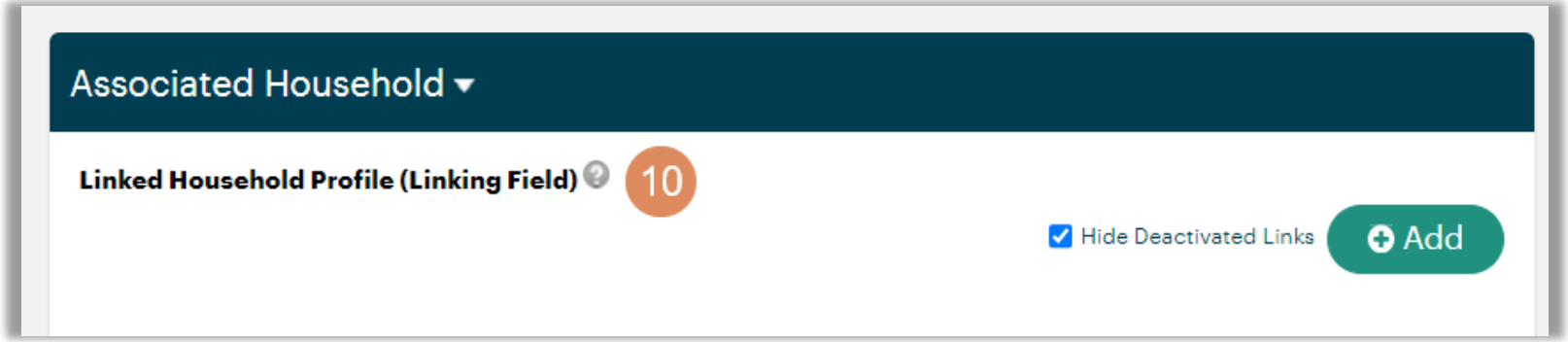
1. Demographic
2. Date and Time
3. Option
4. Hyperlink
5. Numeric
6. Calculation
7. Text
8. Upload
9. Special fields



Field Choices

Field Choice Categories

1. Demographic
2. Date and Time
3. Option
4. Hyperlink
5. Numeric
6. Calculation
7. Text
8. Upload
9. Special fields
10. Linking fields

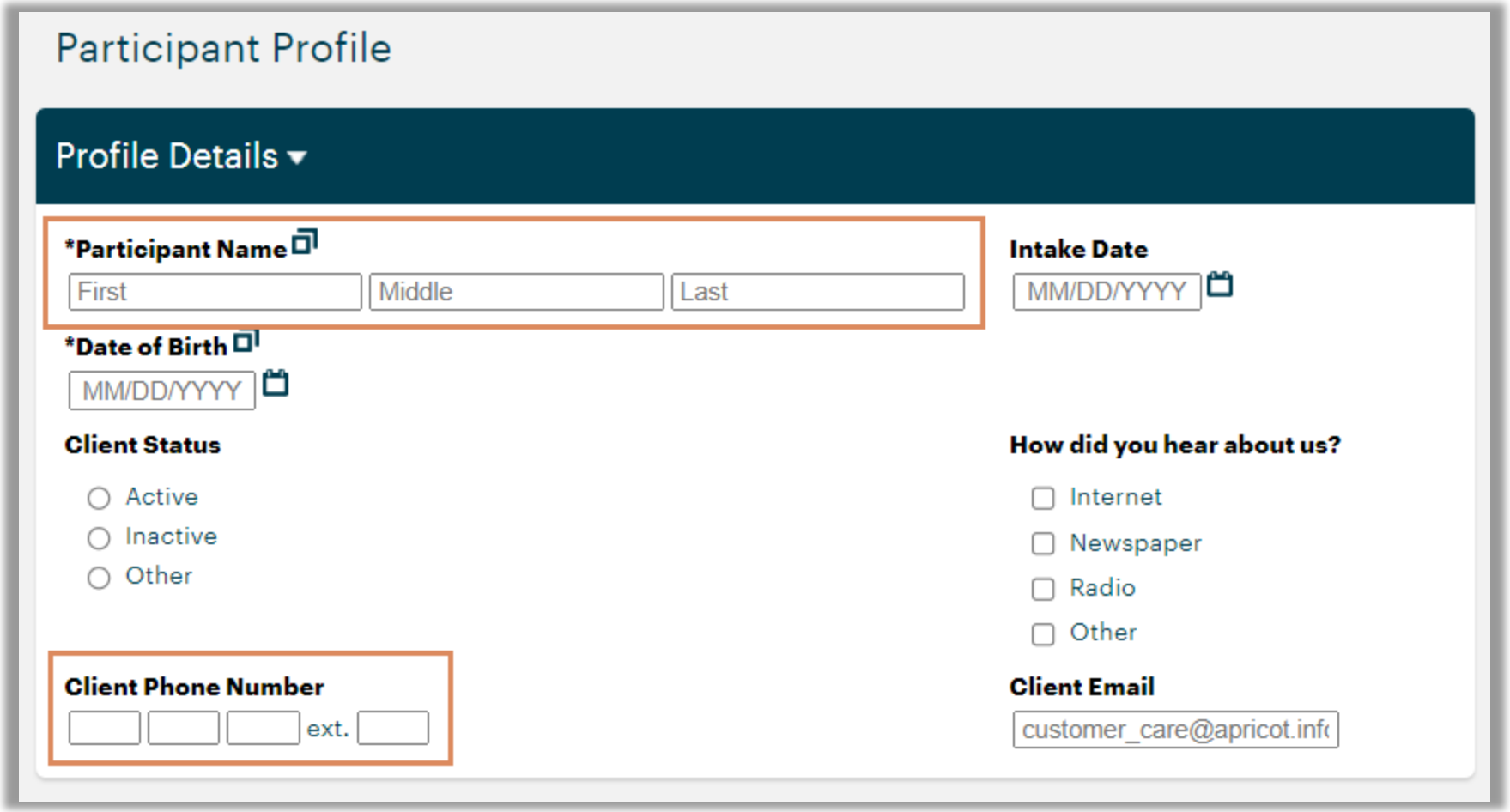


Report Builder Expected Behavior

Expected Behavior – Fill - In The Blank Fields

Demographics

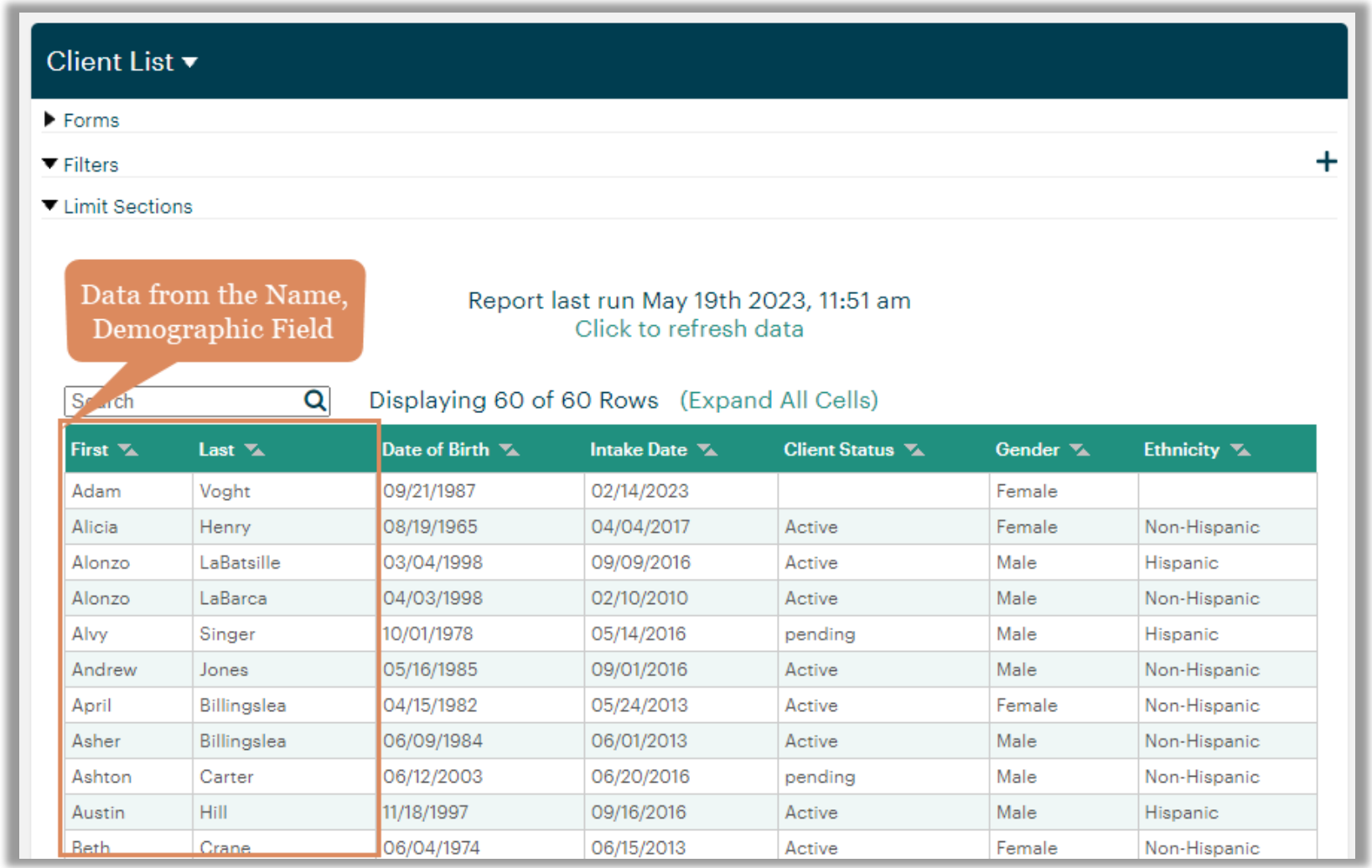
- Preformatted
- Fill in the blank



Expected Behavior – Fill - In The Blank Fields

Demographics

- Preformatted
- Fill in the blank
- Responses Not Uniform

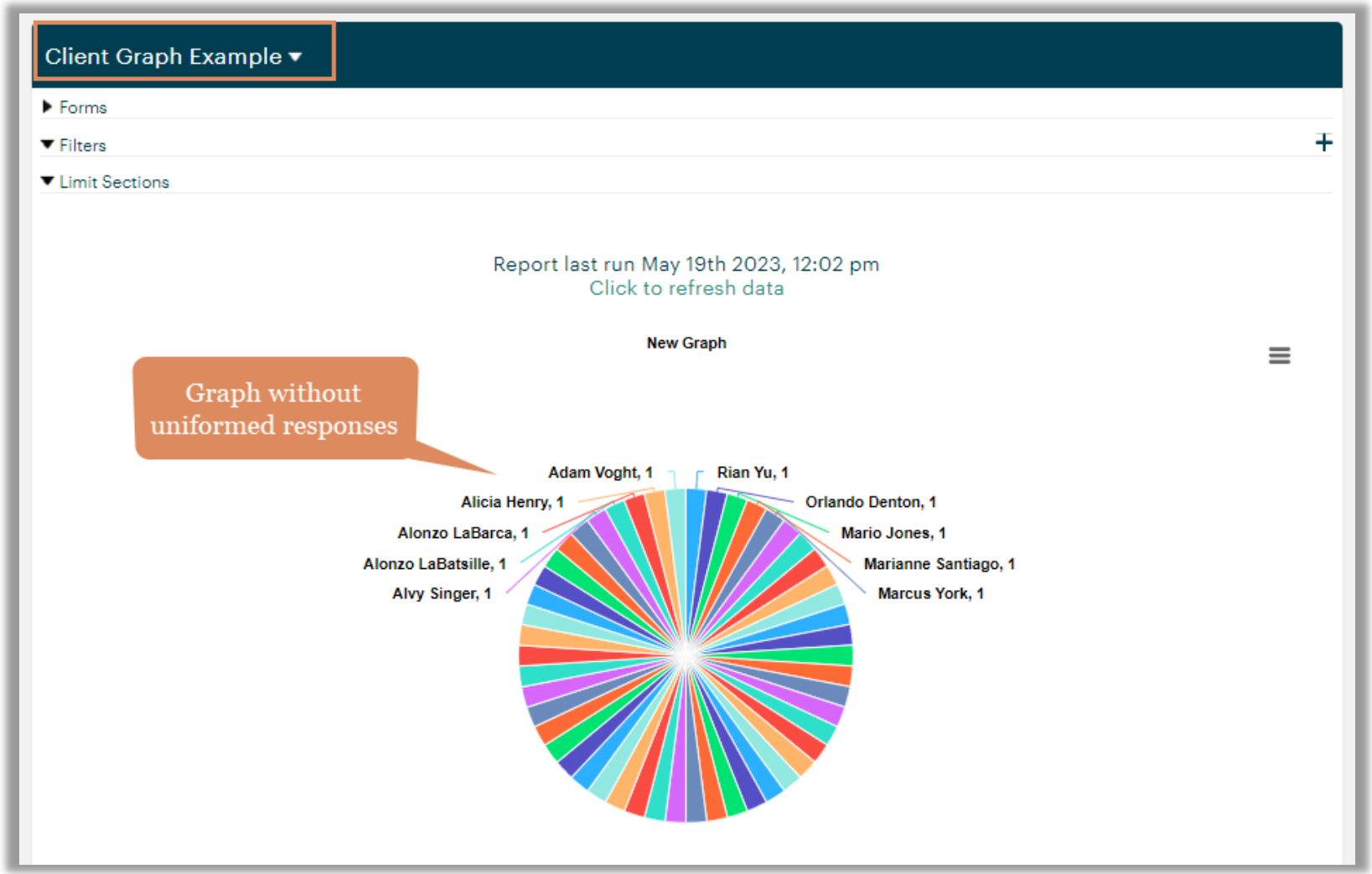


First	Last	Date of Birth	Intake Date	Client Status	Gender	Ethnicity
Adam	Voght	09/21/1987	02/14/2023		Female	
Alicia	Henry	08/19/1965	04/04/2017	Active	Female	Non-Hispanic
Alonzo	LaBatsille	03/04/1998	09/09/2016	Active	Male	Hispanic
Alonzo	LaBarca	04/03/1998	02/10/2010	Active	Male	Non-Hispanic
Alvy	Singer	10/01/1978	05/14/2016	pending	Male	Hispanic
Andrew	Jones	05/16/1985	09/01/2016	Active	Male	Non-Hispanic
April	Billingslea	04/15/1982	05/24/2013	Active	Female	Non-Hispanic
Asher	Billingslea	06/09/1984	06/01/2013	Active	Male	Non-Hispanic
Ashton	Carter	06/12/2003	06/20/2016	pending	Male	Non-Hispanic
Austin	Hill	11/18/1997	09/16/2016	Active	Male	Hispanic
Beth	Crane	06/04/1974	06/15/2013	Active	Female	Non-Hispanic

Expected Behavior – Fill - In The Blank Fields

Demographics

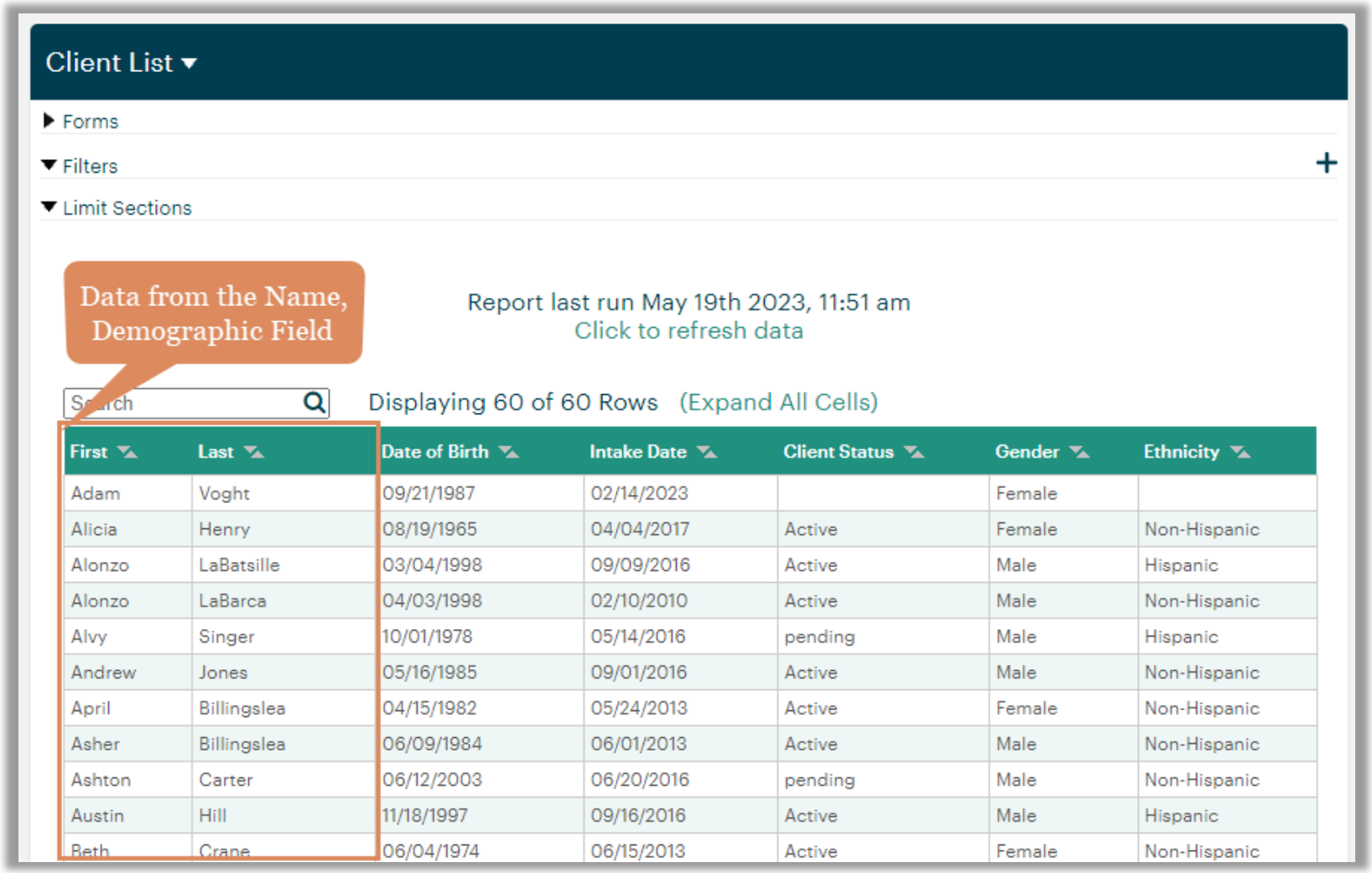
- Preformatted
- Fill in the blank
- Responses Not Uniform
  - Don’t Graph Well



Expected Behavior – Fill - In The Blank Fields

Demographics

- Preformatted
- Fill in the blank
- Responses Not Uniform
  - Don't Graph Well
- Good for lists & counting



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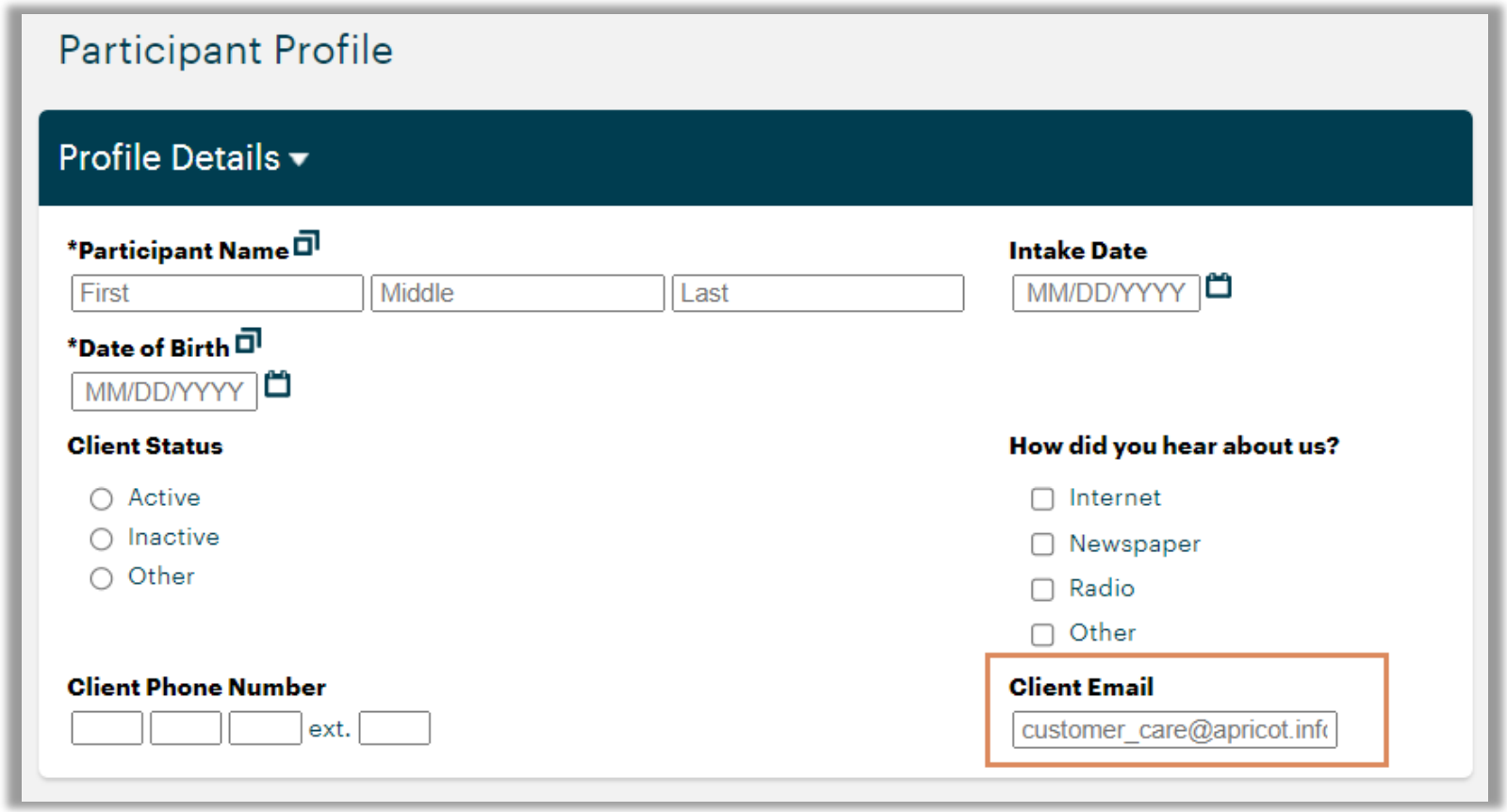
Expected Behavior – Fill – In The Blank Fields

Other Field Choices Like this

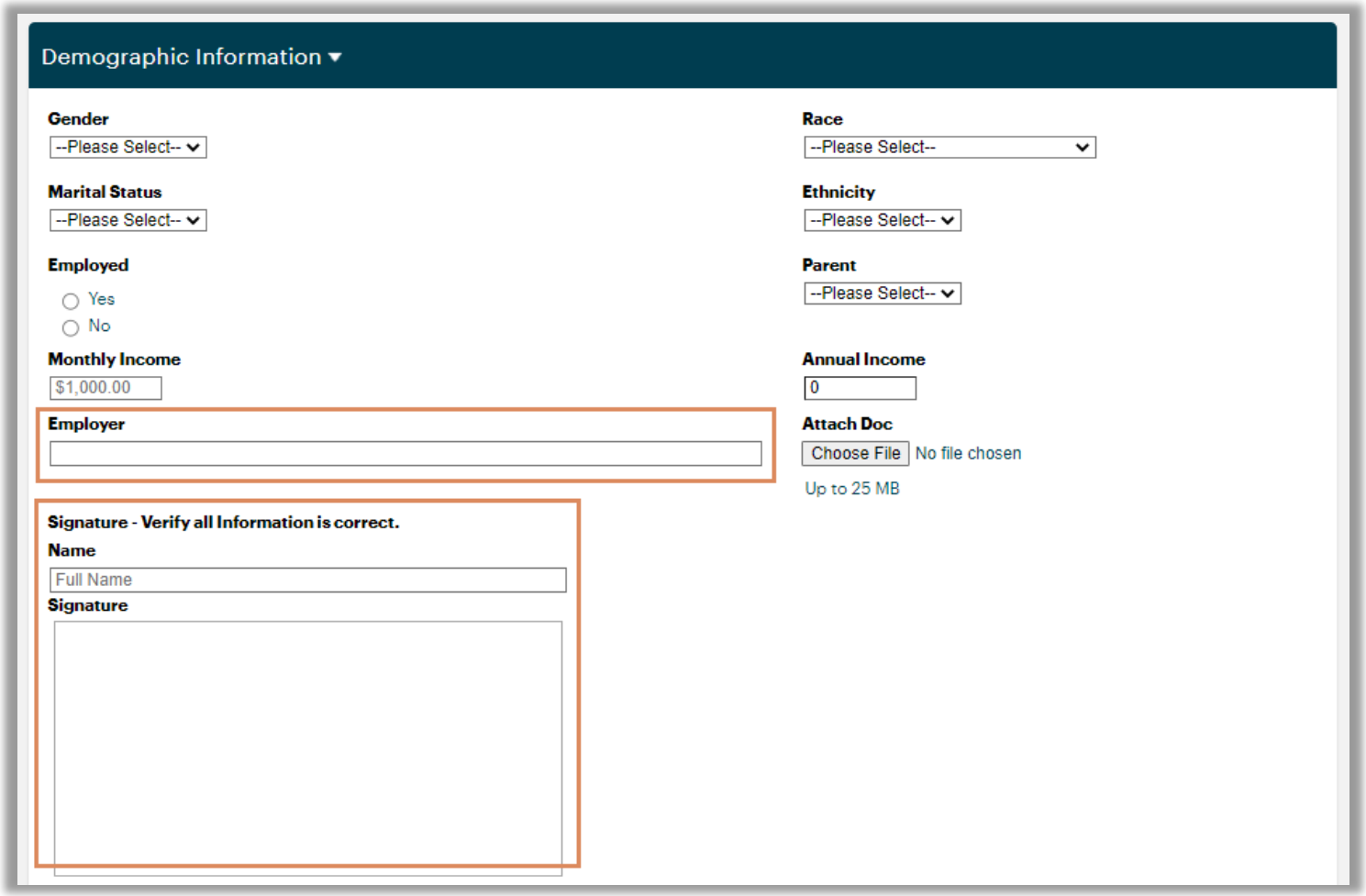
- Email & Hyperlink



Expected Behavior – Fill – In The Blank Fields

Other Field Choices Like this

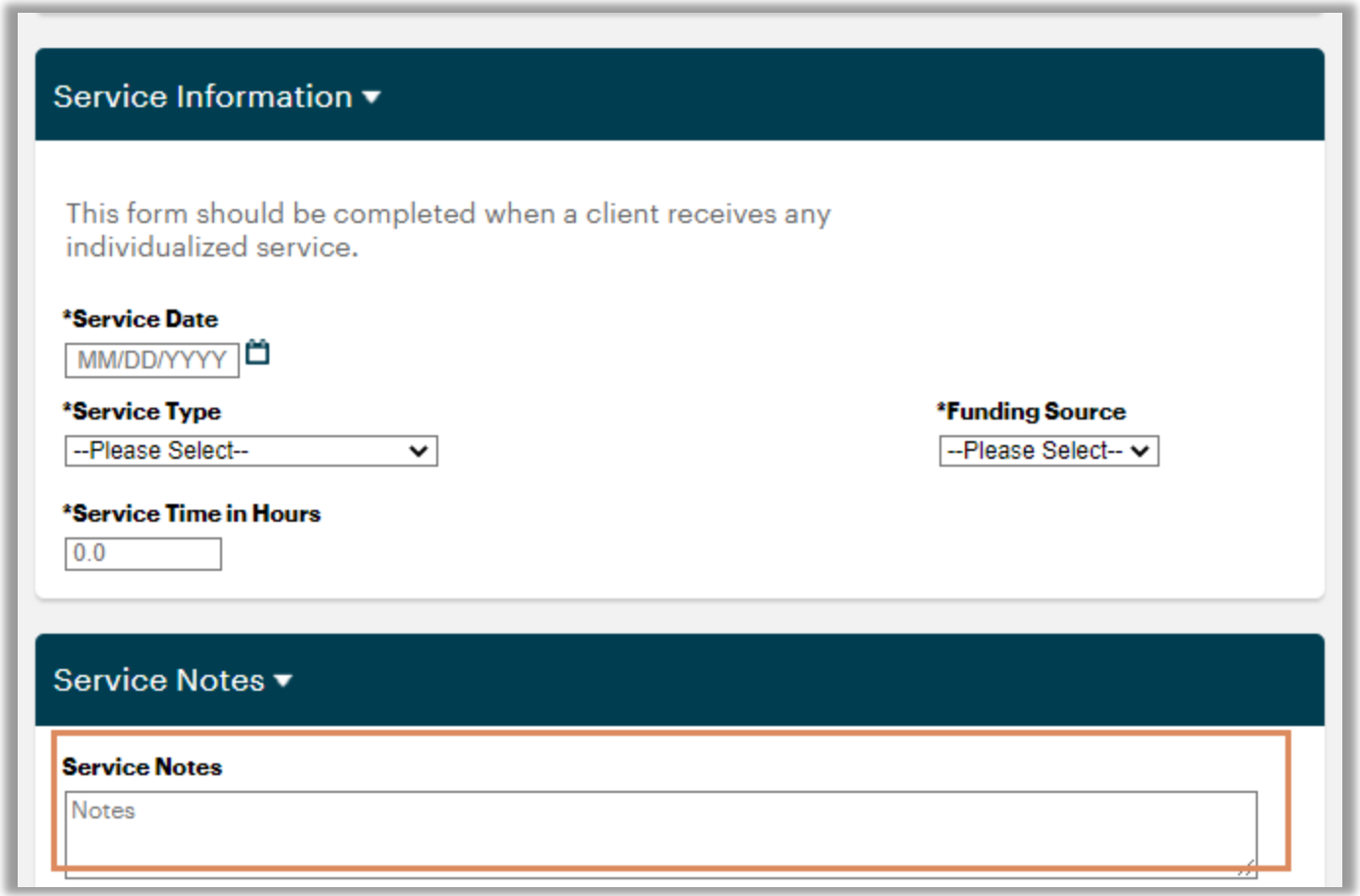
- Email & Hyperlink
- Signature
- Text Elements
  - Employer field



Expected Behavior – Fill – In The Blank Fields

Other Field Choices Like this

- Email & Hyperlink
- Signature
- Text Elements
  - Employer field
  - Notes fields



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- Signature
- Text Elements
  - Employer field
  - Notes fields
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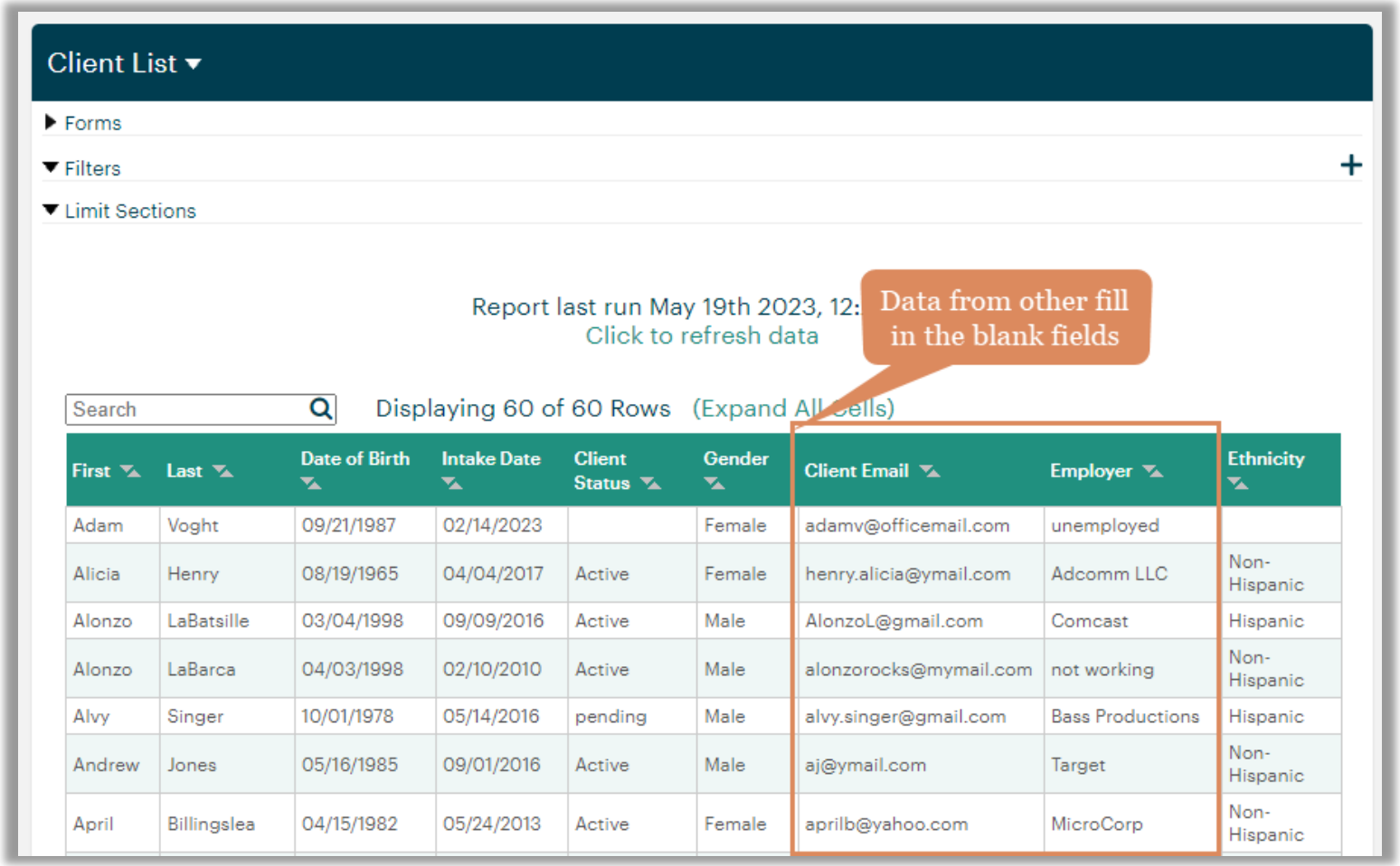
- Good for lists & counting

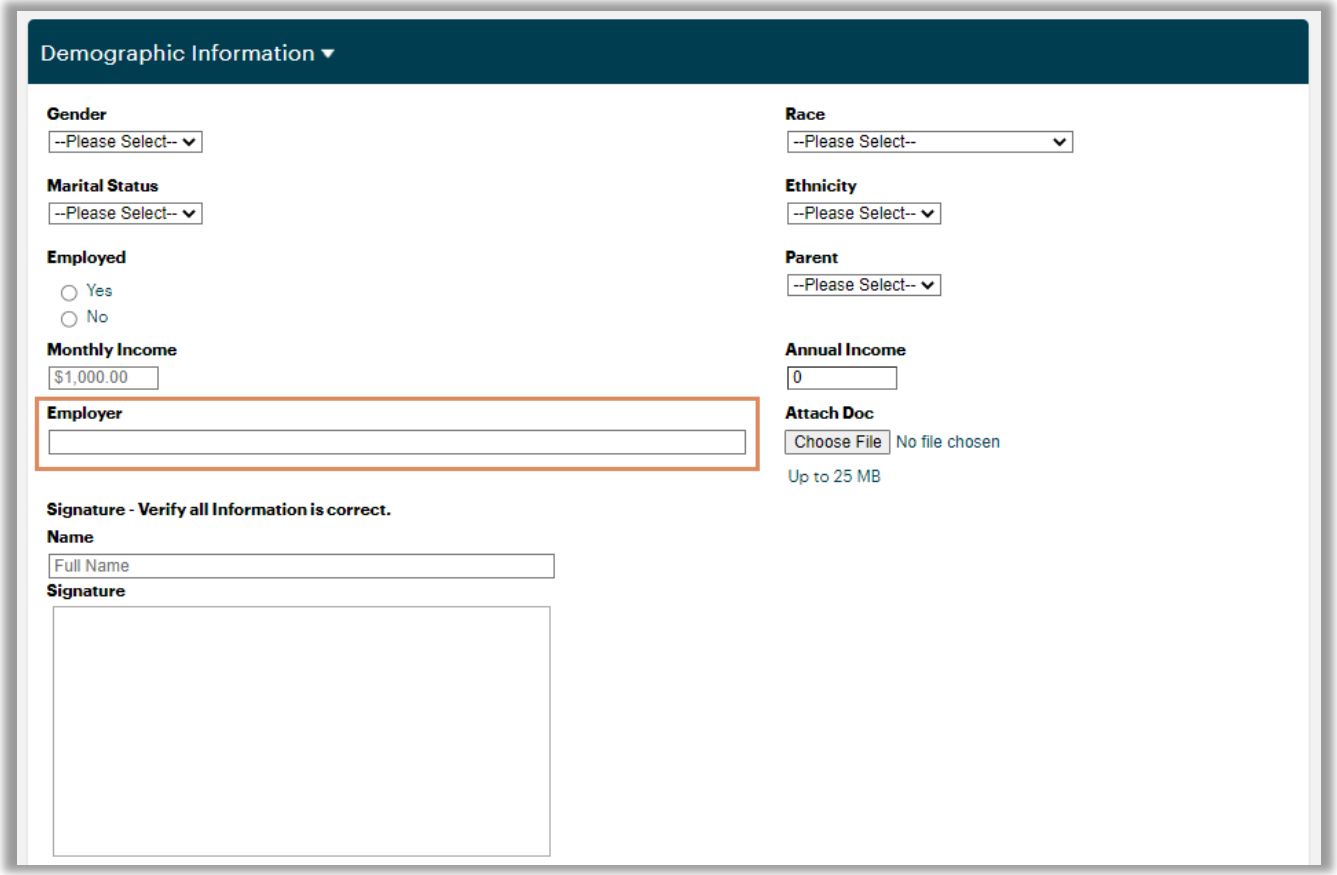


First	Last	Date of Birth	Intake Date	Client Status	Gender	Client Email	Employer	Ethnicity
Adam	Voght	09/21/1987	02/14/2023		Female	adamv@officemail.com	unemployed	
Alicia	Henry	08/19/1965	04/04/2017	Active	Female	henry.alicia@ymail.com	Adcomm LLC	Non-Hispanic
Alonzo	LaBatsille	03/04/1998	09/09/2016	Active	Male	AlonzoL@gmail.com	Comcast	Hispanic
Alonzo	LaBarca	04/03/1998	02/10/2010	Active	Male	alonzorocks@mymail.com	not working	Non-Hispanic
Alvy	Singer	10/01/1978	05/14/2016	pending	Male	alvy.singer@gmail.com	Bass Productions	Hispanic
Andrew	Jones	05/16/1985	09/01/2016	Active	Male	aj@ymail.com	Target	Non-Hispanic
April	Billingslea	04/15/1982	05/24/2013	Active	Female	aprilb@yahoo.com	MicroCorp	Non-Hispanic

Expected Behavior – Fill – In The Blank Fields

Note on Text Fields:

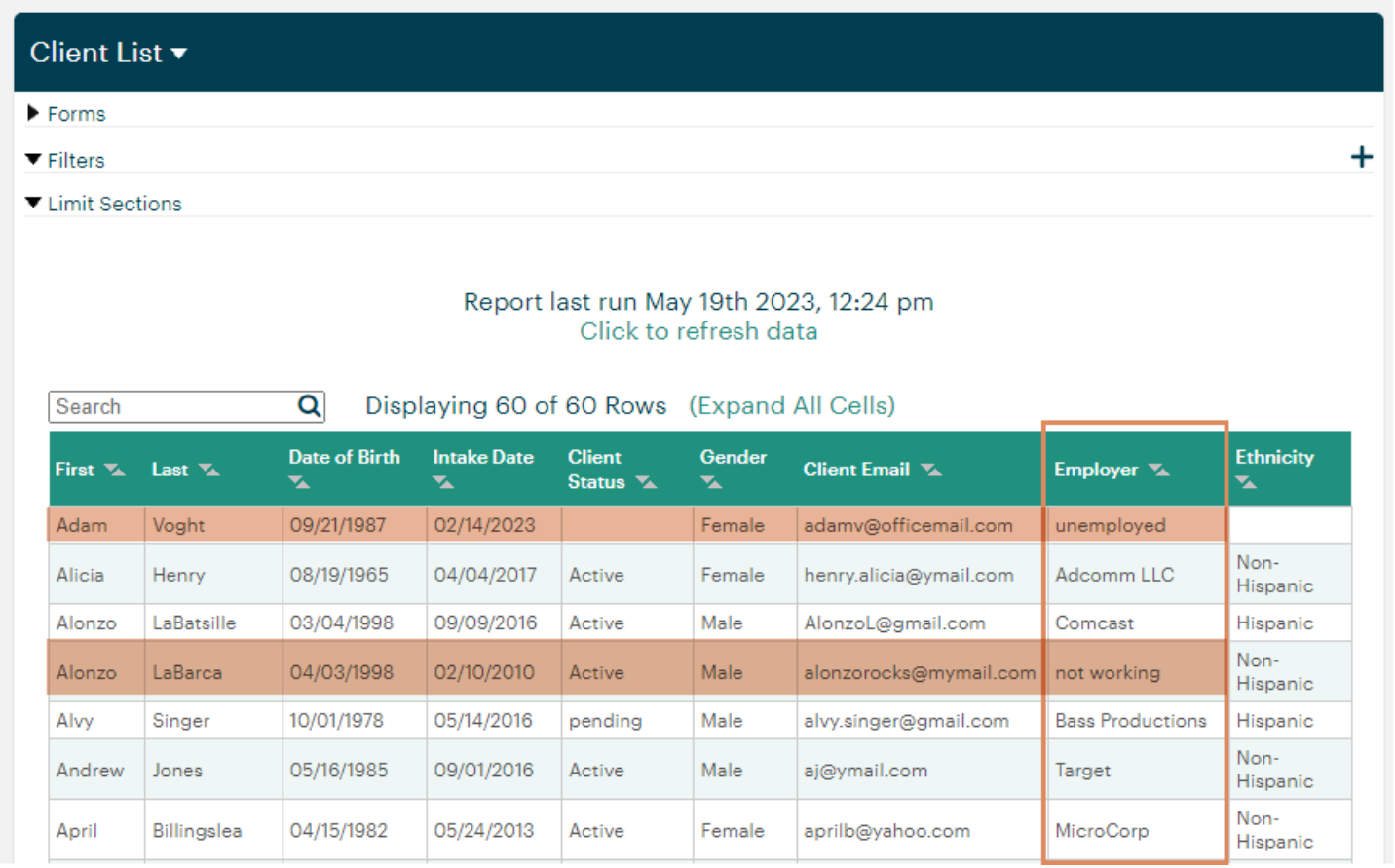
- What makes sense for data entry, may not be best for reporting.
- Making Employer field a text field works well for data entry



Expected Behavior – Fill – In The Blank Fields

Note on Text Fields:

- What makes sense for data entry, may not be best for reporting.
- Making Employer field a text field works well for data entry
- Employer field as text won't give accurate percent of employed vs. unemployed in reports.

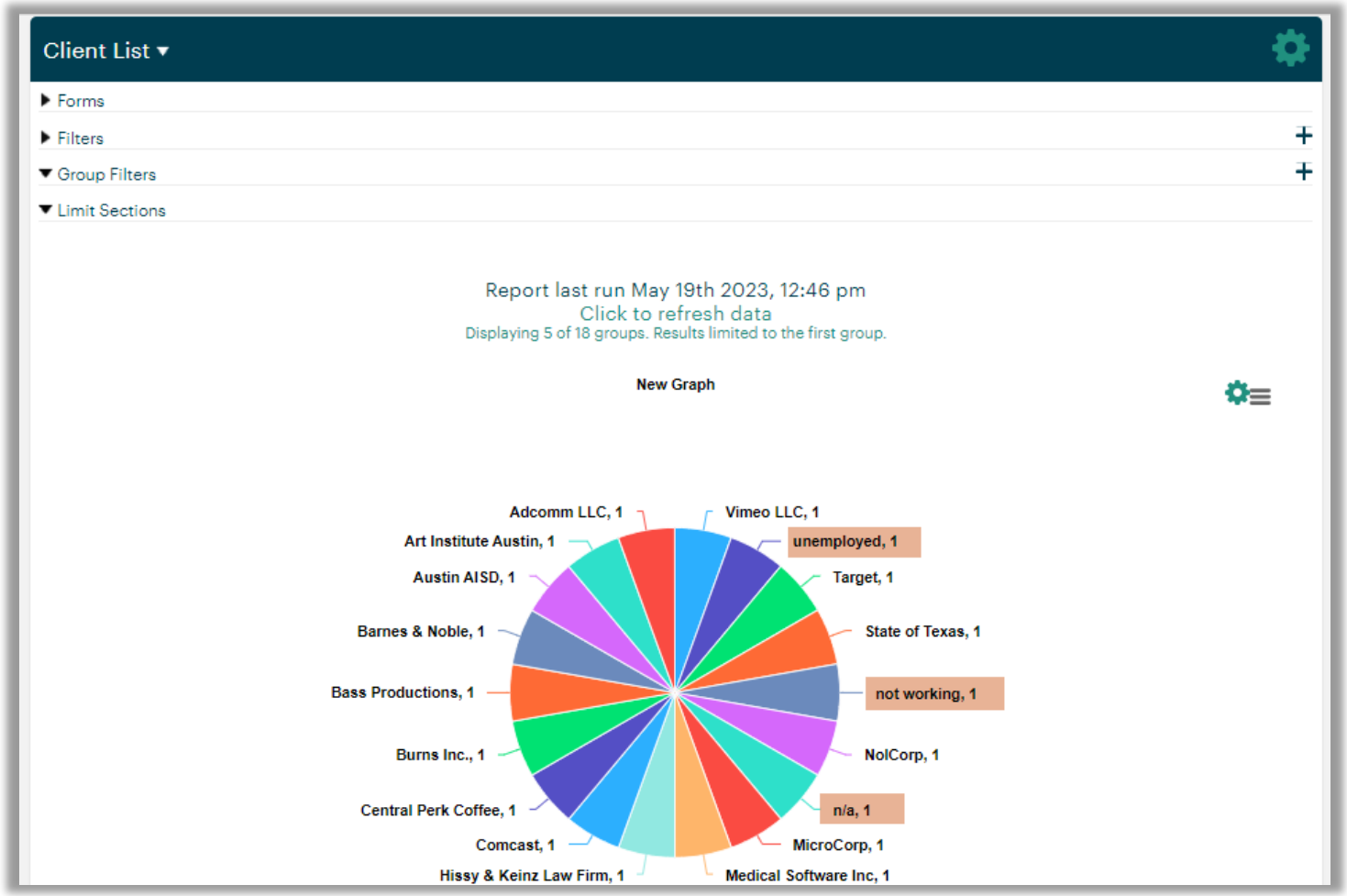


First	Last	Date of Birth	Intake Date	Client Status	Gender	Client Email	Employer	Ethnicity
Adam	Voght	09/21/1987	02/14/2023		Female	adamv@officemail.com	unemployed	
Alicia	Henry	08/19/1965	04/04/2017	Active	Female	henry.alicia@ymail.com	Adcomm LLC	Non-Hispanic
Alonzo	LaBatsille	03/04/1998	09/09/2016	Active	Male	AlonzoL@gmail.com	Comcast	Hispanic
Alonzo	LaBarca	04/03/1998	02/10/2010	Active	Male	alonzorocks@mymail.com	not working	Non-Hispanic
Alvy	Singer	10/01/1978	05/14/2016	pending	Male	alvy.singer@gmail.com	Bass Productions	Hispanic
Andrew	Jones	05/16/1985	09/01/2016	Active	Male	aj@ymail.com	Target	Non-Hispanic
April	Billingslea	04/15/1982	05/24/2013	Active	Female	aprilb@yahoo.com	MicroCorp	Non-Hispanic

Expected Behavior – Fill – In The Blank Fields

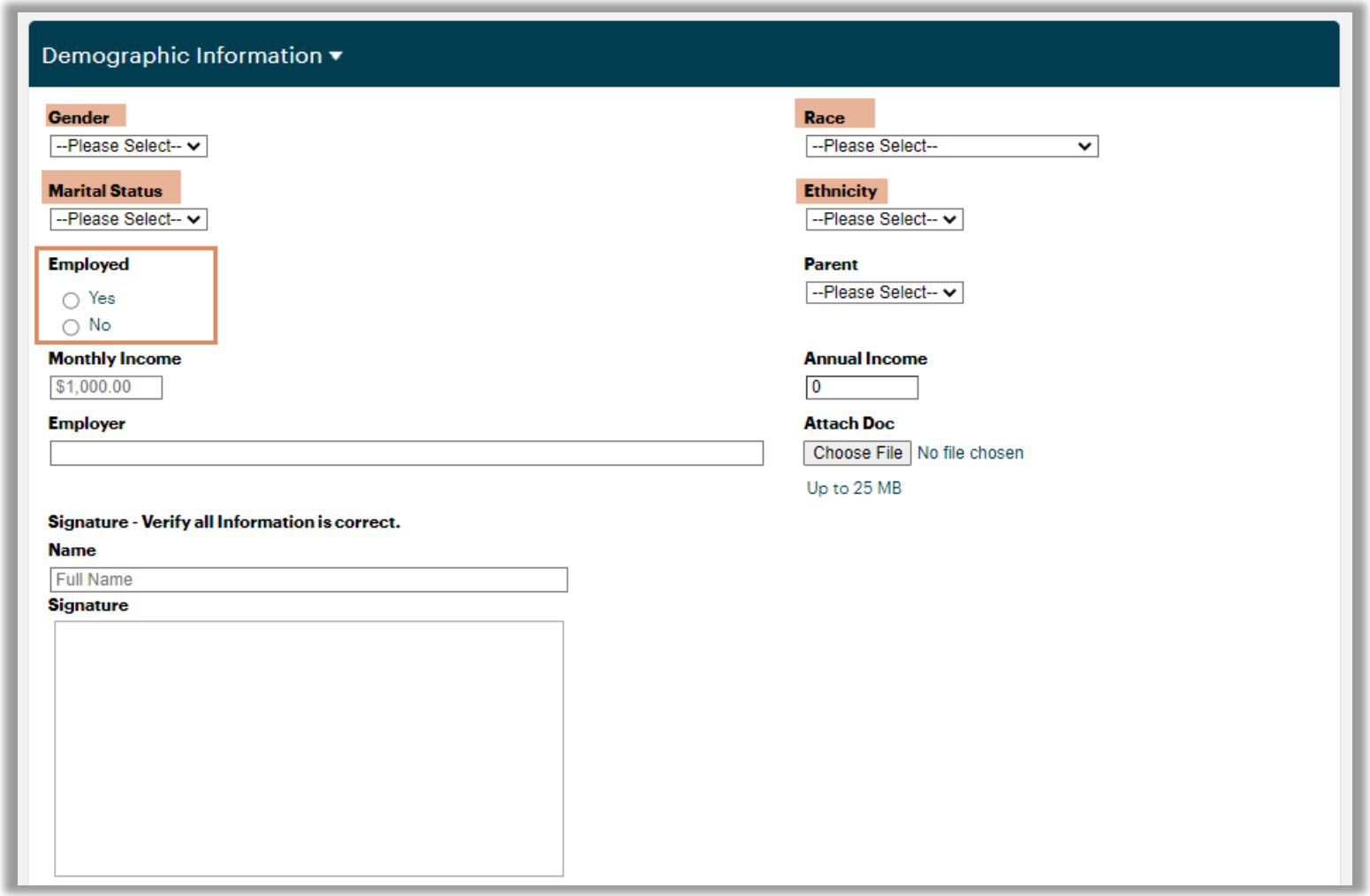
Note on Text Fields:

- What makes sense for data entry, may not be best for reporting.
- Making Employer field a text field works well for data entry
- Employer field as text won't give accurate percent of employed vs. unemployed in reports.
  - Due to lack of uniformed answers



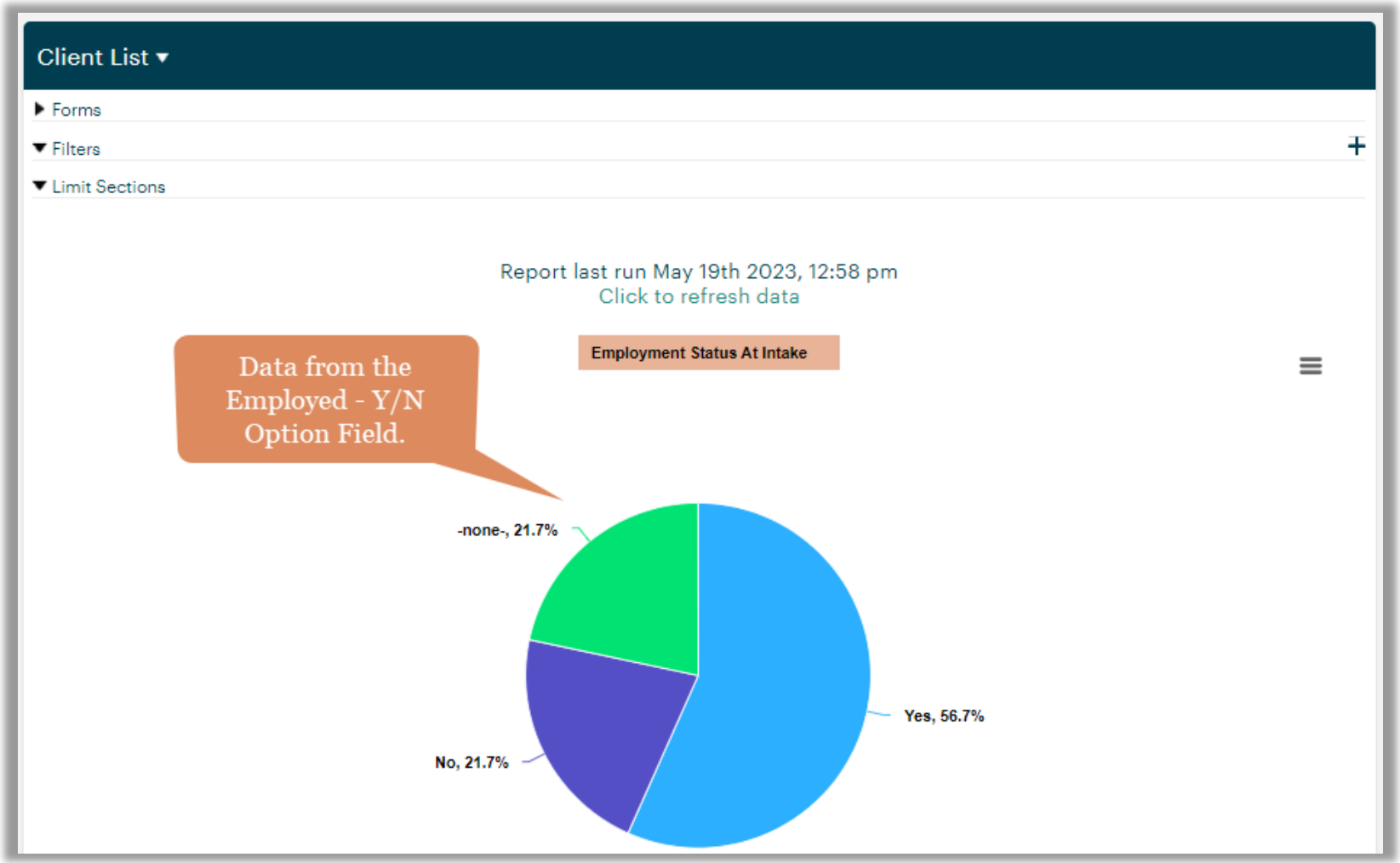
Expected Behavior – Option Fields

- Radio button, Dropdown, Checkbox, Masked value, Likert Scale
- Force uniformed answers



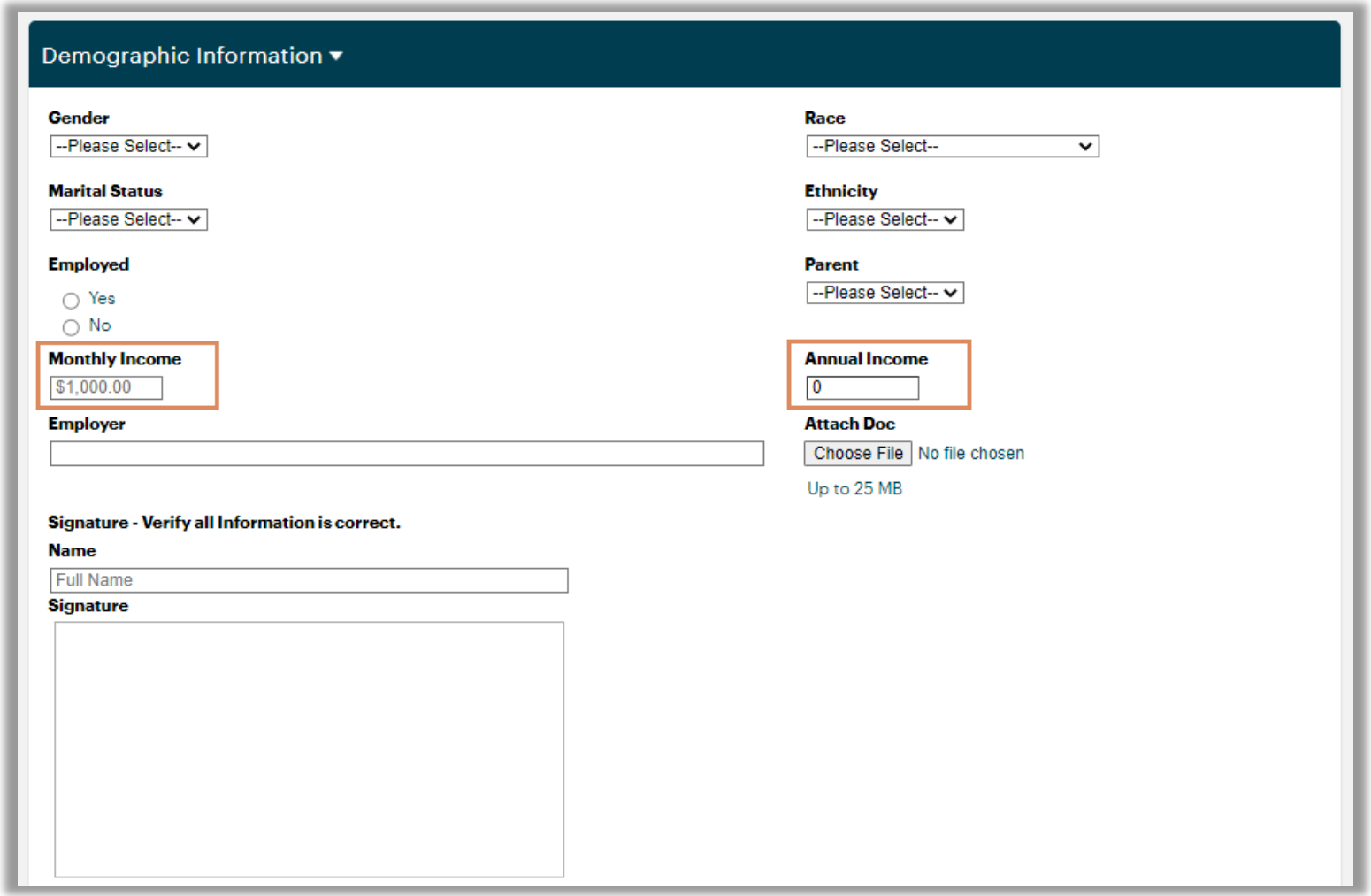
Expected Behavior – Option Fields

- Radio button, Dropdown, Checkbox, Masked value, Likert Scale
- Force uniformed answers
- Good for pulling statistical numbers



Expected Behavior – Numeric & Calculation Fields

- Currency, Decimal, Numeric, Calculation fields
- Force uniformed answers



Expected Behavior – Numeric & Calculation Fields

- Currency, Decimal, Numeric, Calculation fields
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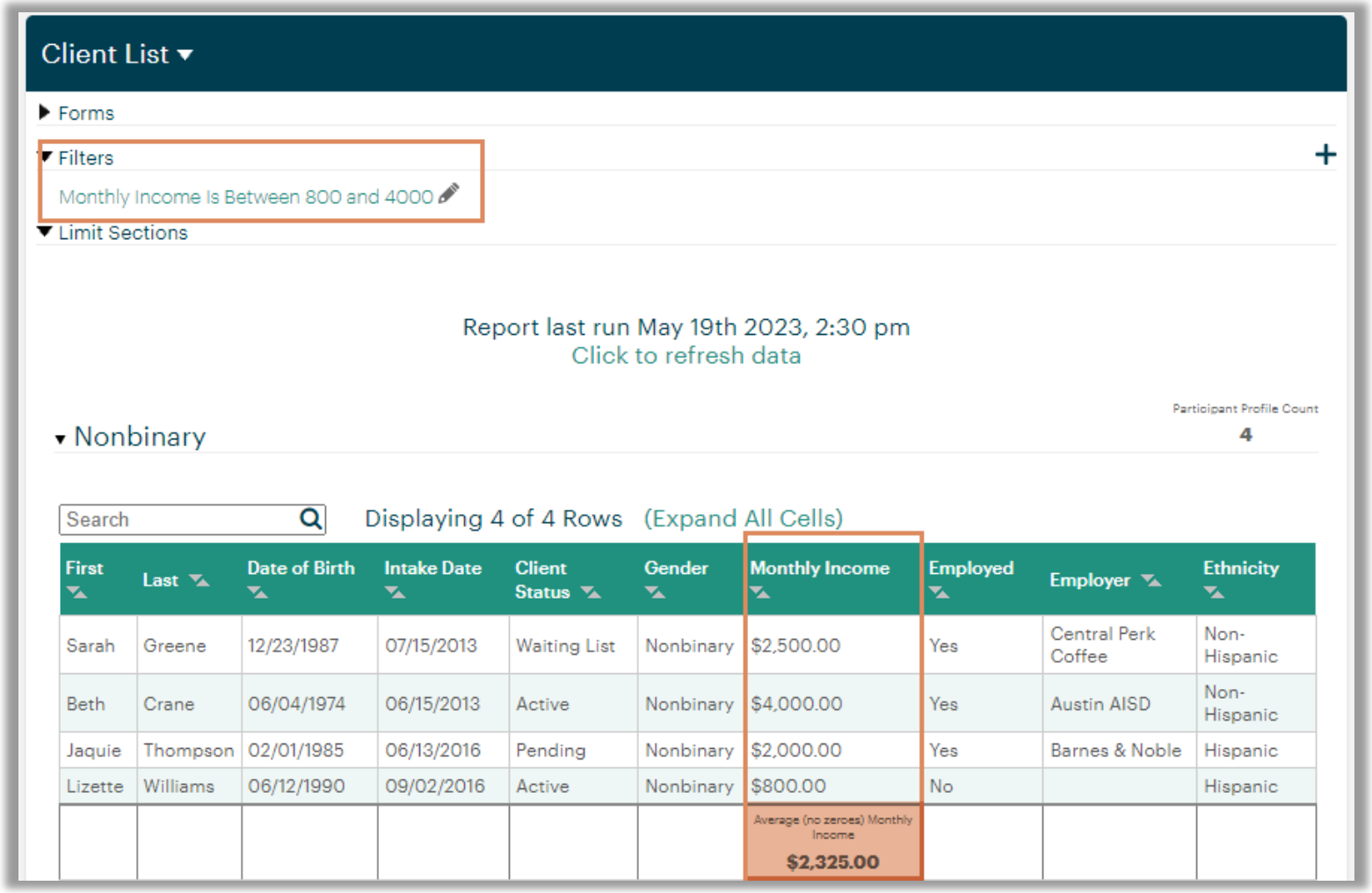

First	Last	Date of Birth	Intake Date	Client Status	Gender	Monthly Income	Employed	Employer	Ethnicity
Sarah	Greene	12/23/1987	07/15/2013	Waiting List	Nonbinary	$2,500.00	Yes	Central Perk Coffee	Non-Hispanic
Beth	Crane	06/04/1974	06/15/2013	Active	Nonbinary	$4,000.00	Yes	Austin AISD	Non-Hispanic
Jaquie	Thompson	02/01/1985	06/13/2016	Pending	Nonbinary	$2,000.00	Yes	Barnes & Noble	Hispanic
Lizette	Williams	06/12/1990	09/02/2016	Active	Nonbinary	$800.00	No		Hispanic

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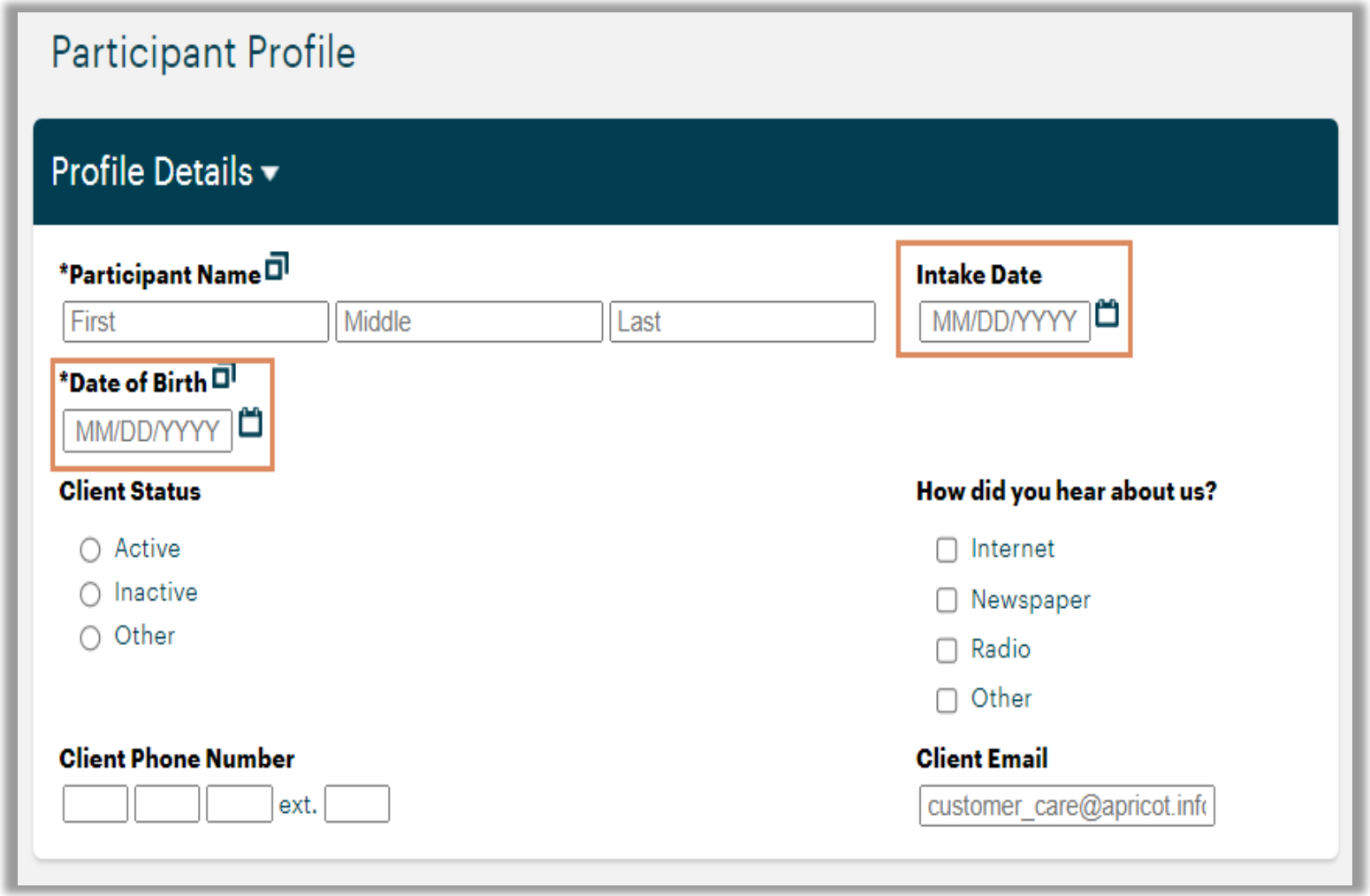
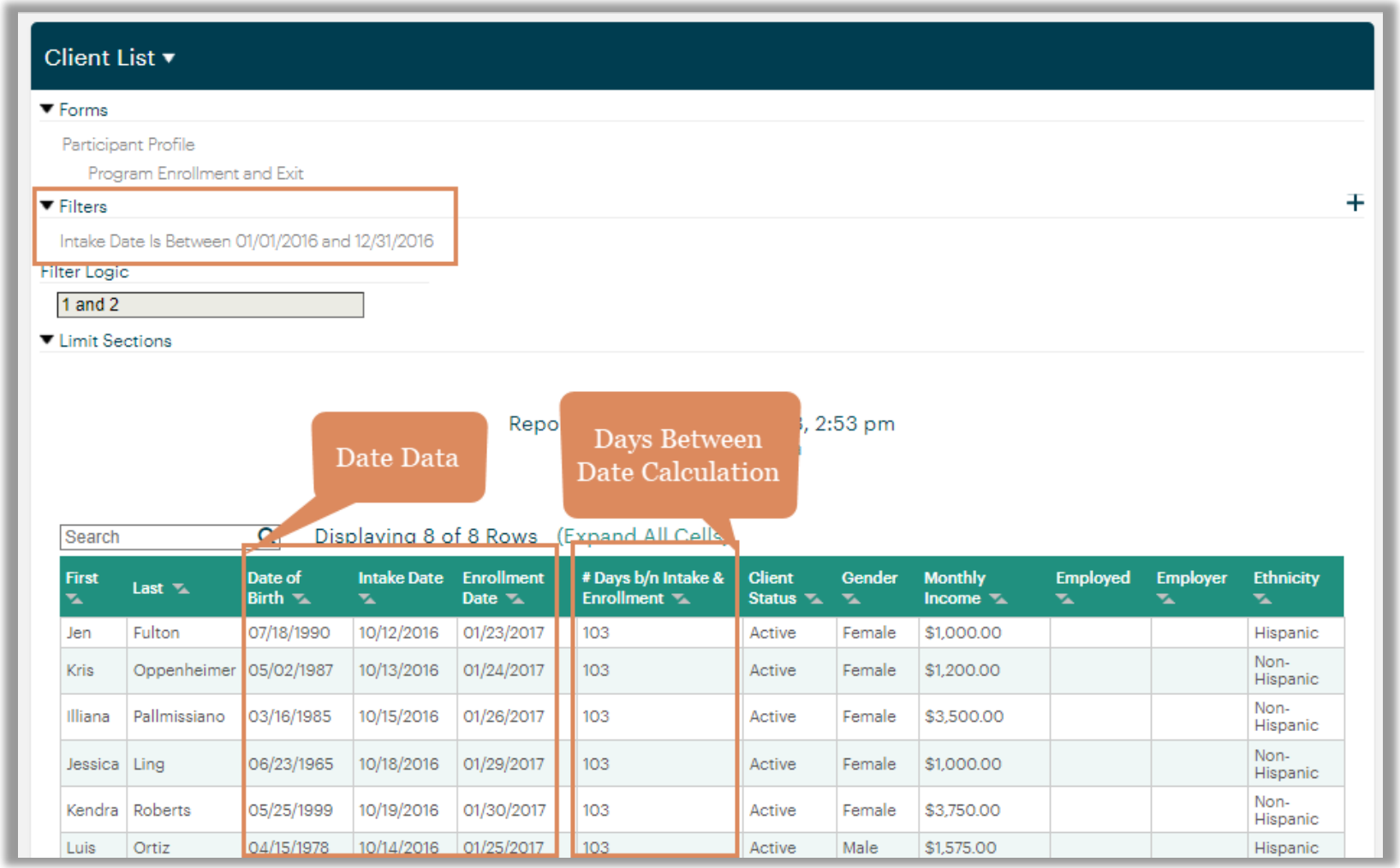
Expected Behavior – Date Fields

- Date, Date Dropdown
- Force uniformed answers



Expected Behavior – Date Fields

- Date, Date Dropdown
- Force uniformed answers
- Good for pulling statistical numbers



First	Last	Date of Birth	Intake Date	Enrollment Date	# Days b/n Intake & Enrollment	Client Status	Gender	Monthly Income	Employed	Employer	Ethnicity
Jen	Fulton	07/18/1990	10/12/2016	01/23/2017	103	Active	Female	$1,000.00			Hispanic
Kris	Oppenheimer	05/02/1987	10/13/2016	01/24/2017	103	Active	Female	$1,200.00			Non-Hispanic
Illiana	Pallmissiano	03/16/1985	10/15/2016	01/26/2017	103	Active	Female	$3,500.00			Non-Hispanic
Jessica	Ling	06/23/1965	10/18/2016	01/29/2017	103	Active	Female	$1,000.00			Non-Hispanic
Kendra	Roberts	05/25/1999	10/19/2016	01/30/2017	103	Active	Female	$3,750.00			Non-Hispanic
Luis	Ortiz	04/15/1978	10/14/2016	01/25/2017	103	Active	Male	$1,575.00			Hispanic

Best Practice

Best Practice

Question to Ask When Designing Forms:

Will I need to pull statistical data from this field?

Good for Pulling Stats Use if answer is “yes”	Good for Listing Things Use if answer is “No”
Option Fields	Demographic Fields
Numeric Fields	Text Fields
Calculations Fields	Upload Fields
Date and Time Fields	Hyperlink

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.

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