

# Apricot

## Designing Forms for Effective Reporting: A Best Practice Guide

# Meet Your Trainer

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# 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


### Participant Profile

#### Profile Details ▾

**1** **Participant Name** 

First  Middle  Last

**2** **Date of Birth** 

MM/DD/YYYY 

**3** **Client Status**

Active  
 Inactive  
 Other

**How did you hear about us?**

Internet  
 Newspaper  
 Radio  
 Other

**4** **Client Email**

customer\_care@apricot.inf

**Client Phone Number**

ext.

#### Demographic Information ▾

**Gender** **Race**

# 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

The screenshot shows a form titled "Demographic Information" with a dark teal header. The form is divided into two columns. The left column contains fields for Gender, Marital Status, Employed (radio buttons), Monthly Income (numeric), and Employer (text). The right column contains fields for Race, Ethnicity, Parent (dropdown), Annual Income (numeric), and Attach Doc (file upload). At the bottom, there is a "Signature" section with a "Name" field and a "Signature" area. Numbered callouts (5-9) are placed over the form to identify field types: 5 is over the Monthly Income field, 6 is over the Annual Income field, 7 is over the Employer field, 8 is over the Attach Doc field, and 9 is over the "Signature - Verify all Information is correct." instruction.

**Demographic Information** ▾

**Gender**  
--Please Select-- ▾

**Marital Status**  
--Please Select-- ▾

**Employed**  
 Yes  
 No

**Monthly Income** 5  
\$1,000.00

**Employer** 7  
\_\_\_\_\_

**Signature - Verify all Information is correct.** 9

**Name**  
Full Name \_\_\_\_\_

**Signature**  
\_\_\_\_\_

**Race**  
--Please Select-- ▾

**Ethnicity**  
--Please Select-- ▾

**Parent**  
--Please Select-- ▾

**Annual Income** 6  
0

**Attach Doc** 8  
Choose File No file chosen  
Up to 25 MB

# 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

The screenshot displays a user interface for field selection. At the top, a dark teal header bar contains the text "Associated Household" followed by a downward-pointing triangle. Below this, the main content area is white. It features the text "Linked Household Profile (Linking Field)" with a small question mark icon to its right. To the right of this text is a circular orange badge containing the number "10". Further to the right, there is a checkbox labeled "Hide Deactivated Links" which is currently checked. At the bottom right of the interface is a green rounded rectangular button with a white plus sign and the word "Add".



# Report Builder Expected Behavior


# Expected Behavior – Fill - In The Blank Fields

## Demographics


- Preformatted
- Fill in the blank


### Participant Profile

#### Profile Details ▾

**\*Participant Name** 

First  Middle  Last

**\*Date of Birth** 

MM/DD/YYYY 

**Client Status**

Active


Inactive

Other

**Client Phone Number**

ext.

**Intake Date**

MM/DD/YYYY 

**How did you hear about us?**

Internet

Newspaper

Radio

Other

**Client Email**

customer\_care@apricot.info

# Expected Behavior – Fill - In The Blank Fields

## Demographics

- Preformatted
- Fill in the blank
- Responses Not Uniform

Client List ▾

► Forms

▼ Filters +

▼ Limit Sections

Report last run May 19th 2023, 11:51 am  
[Click to refresh data](#)

Search 🔍

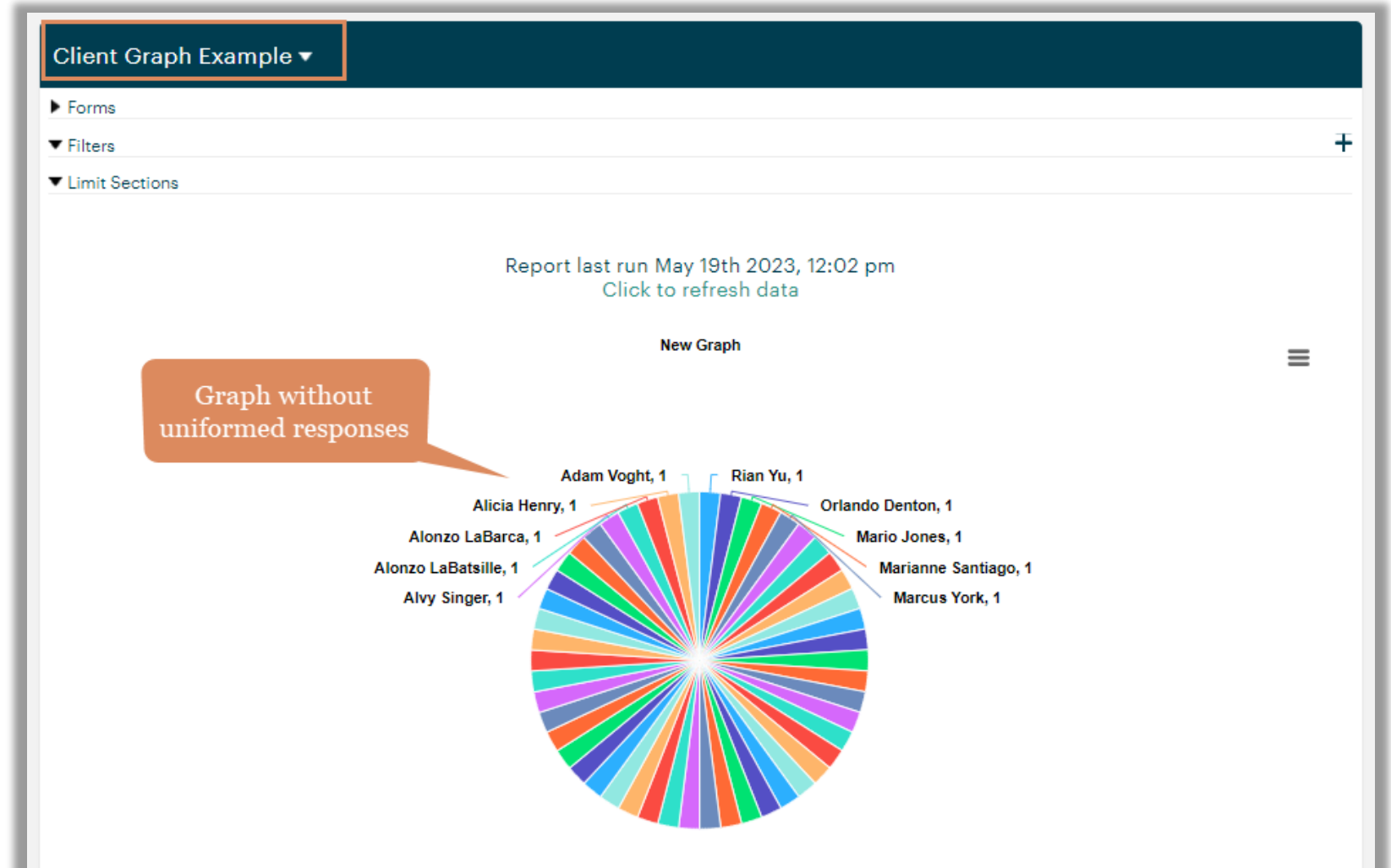
Displaying 60 of 60 Rows (Expand All Cells)

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

Client List ▾

► Forms

▼ Filters +

▼ Limit Sections

Report last run May 19th 2023, 11:51 am  
[Click to refresh data](#)

Search 🔍 Displaying 60 of 60 Rows (Expand All Cells)

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

## Other Field Choices Like this


- Email & Hyperlink


### Participant Profile

#### Profile Details ▾

**\*Participant Name** 

First  Middle  Last

**\*Date of Birth** 




**Client Status**

Active  
 Inactive  
 Other

**Client Phone Number**

ext.

**Intake Date**



**How did you hear about us?**

Internet  
 Newspaper  
 Radio  
 Other

**Client Email**

# Expected Behavior – Fill – In The Blank Fields

## Other Field Choices Like this

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

The screenshot shows a 'Demographic Information' form with the following fields and their current values:

- Gender:** --Please Select--
- Marital Status:** --Please Select--
- Employed:** Radio buttons for Yes and No.
- Monthly Income:** \$1,000.00
- Employer:** A text input field, highlighted with an orange border.
- Signature - Verify all Information is correct:** A section containing:
  - Name:** Full Name
  - Signature:** A large text area, highlighted with an orange border.
- Race:** --Please Select--
- Ethnicity:** --Please Select--
- Parent:** --Please Select--
- Annual Income:** 0
- Attach Doc:** Choose File button, No file chosen, Up to 25 MB

# Expected Behavior – Fill – In The Blank Fields

## Other Field Choices Like this

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

The screenshot shows a form titled "Service Information" with a dark teal header. Below the header, there is a descriptive text: "This form should be completed when a client receives any individualized service." The form contains several required fields, indicated by an asterisk (\*):

- \*Service Date**: A text input field with the placeholder "MM/DD/YYYY" and a calendar icon.
- \*Service Type**: A dropdown menu with the placeholder "--Please Select--".
- \*Funding Source**: A dropdown menu with the placeholder "--Please Select--".
- \*Service Time in Hours**: A text input field with the value "0.0".

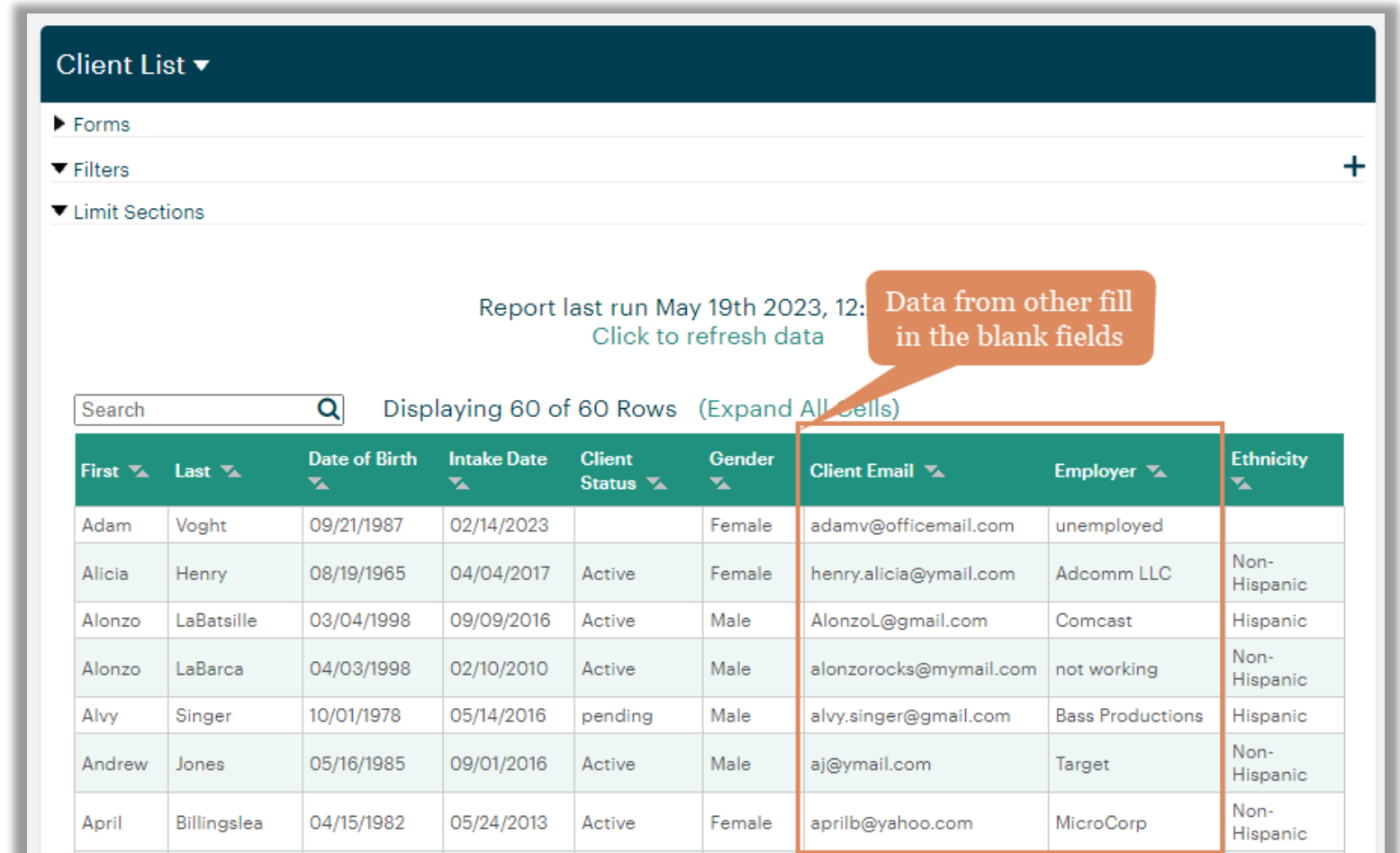
Below the "Service Information" section is another section titled "Service Notes" with a dark teal header. Underneath, there is a text area labeled "Service Notes" with the placeholder "Notes". The text area is highlighted with an orange border.



# Expected Behavior – Fill – In The Blank Fields

## Other Field Choices Like this

- Email & Hyperlink
- Signature
- Text Elements
  - Employer field
  - Notes fields
- Responses Not Uniform
- Good for lists & counting



The screenshot shows a 'Client List' interface. At the top, there are sections for 'Forms', 'Filters', and 'Limit Sections'. Below these is a report summary: 'Report last run May 19th 2023, 12:00' with a 'Click to refresh data' link. A search bar is present, and the table indicates 'Displaying 60 of 60 Rows (Expand All Cells)'. The table has columns for First, Last, Date of Birth, Intake Date, Client Status, Gender, Client Email, Employer, and Ethnicity. An orange callout box with the text 'Data from other fill in the blank fields' points to the 'Client Email', 'Employer', and 'Ethnicity' columns of the first row, which are currently blank.

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

The screenshot shows a 'Demographic Information' form with the following fields:

- Gender:** --Please Select-- (dropdown)
- Marital Status:** --Please Select-- (dropdown)
- Employed:** Radio buttons for Yes and No.
- Monthly Income:** Text field containing '\$1,000.00'.
- Employer:** Text field, highlighted with an orange border.
- Race:** --Please Select-- (dropdown)
- Ethnicity:** --Please Select-- (dropdown)
- Parent:** --Please Select-- (dropdown)
- Annual Income:** Text field containing '0'.
- Attach Doc:** 'Choose File' button, 'No file chosen', and 'Up to 25 MB'.

Below the form, there is a section for 'Signature - Verify all Information is correct.' containing a 'Name' field with 'Full Name' and a 'Signature' field.

# 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.

Client List ▾

► Forms

▼ Filters +

▼ Limit Sections

Report last run May 19th 2023, 12:24 pm  
[Click to refresh data](#)

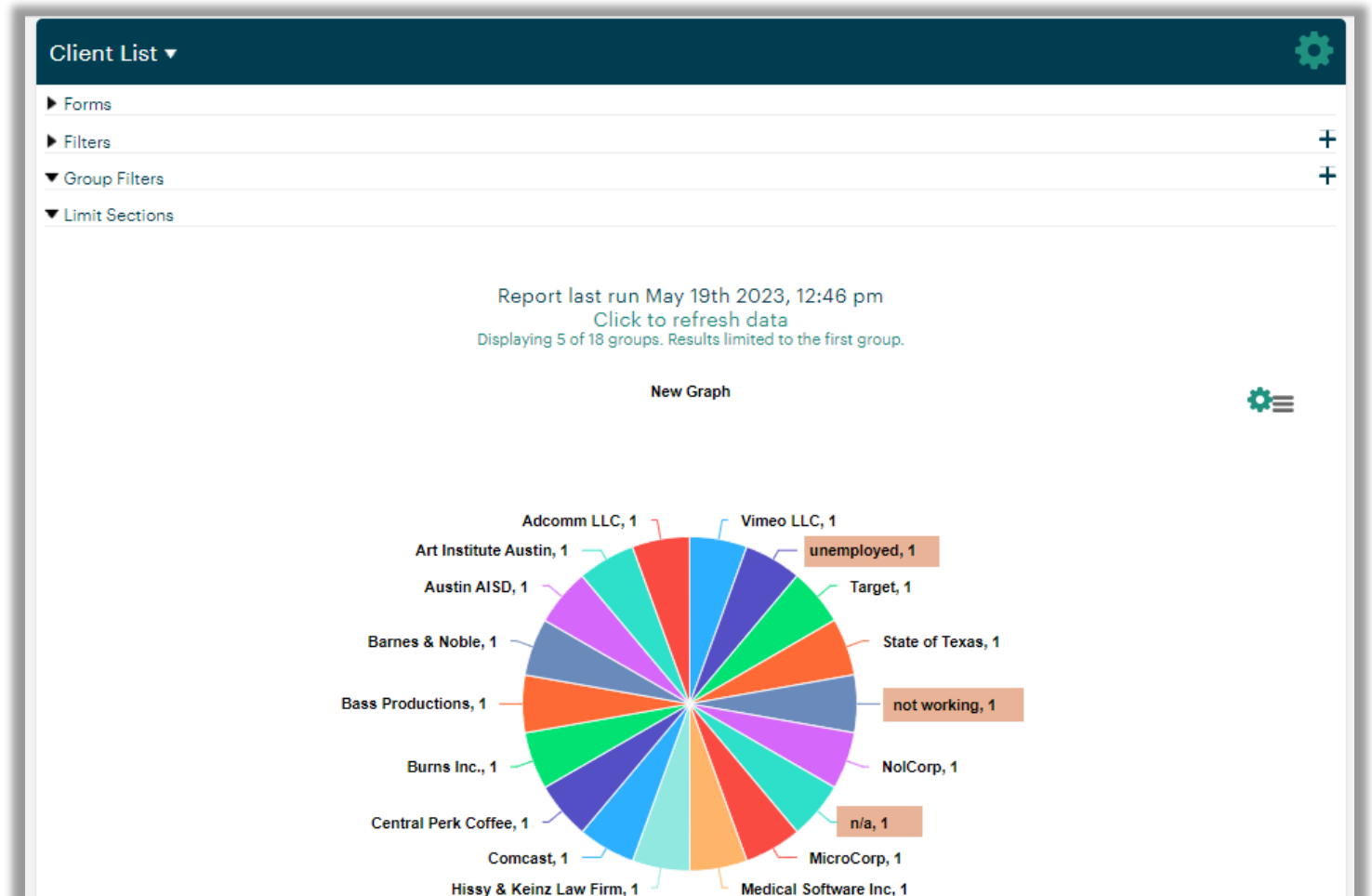
Search  Q Displaying 60 of 60 Rows (Expand All Cells)

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

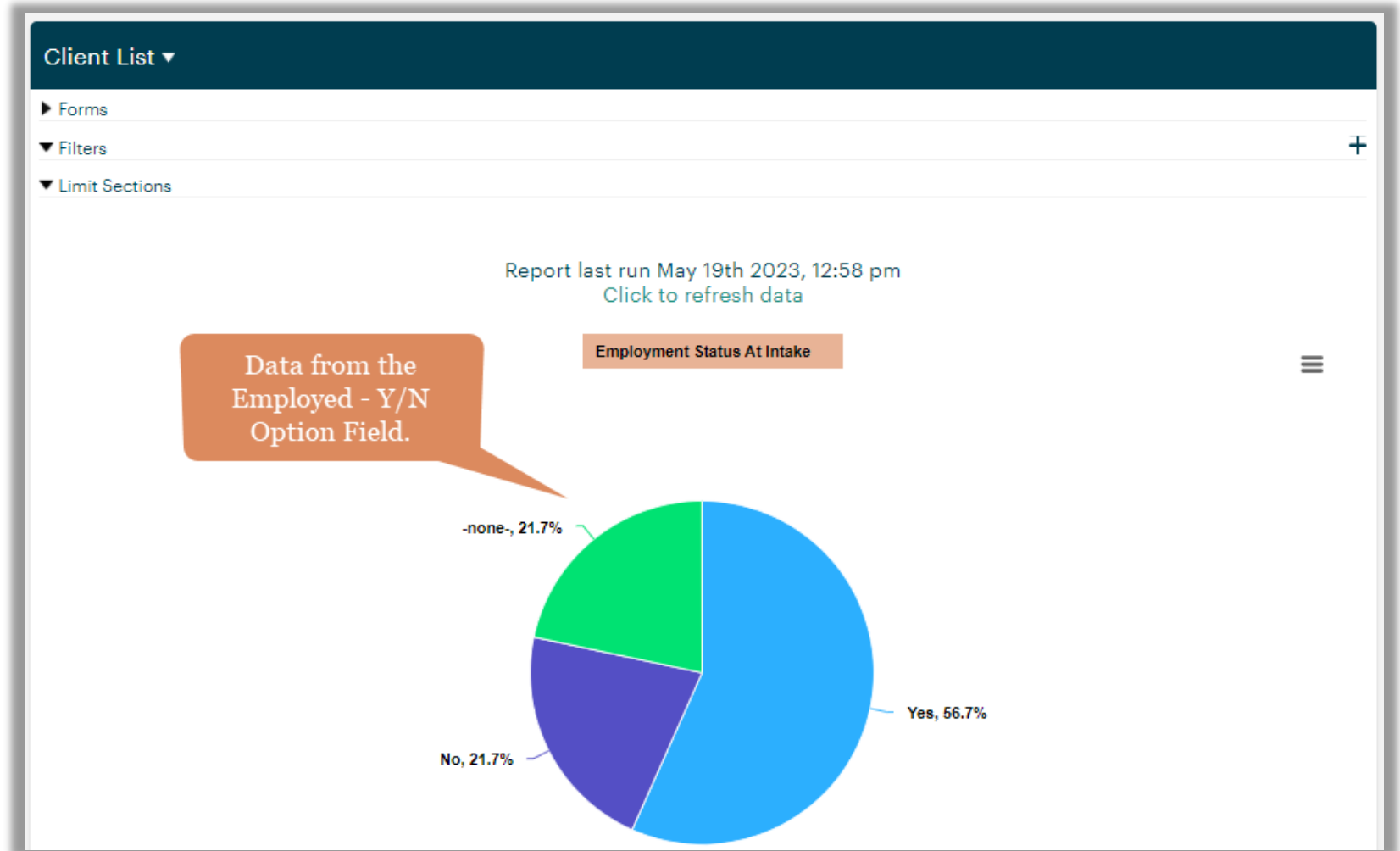
- Radio button, Dropdown, Checkbox, Masked value, Likert Scale
- Force uniformed answers

### Demographic Information ▾

<b>Gender</b> --Please Select-- ▾	<b>Race</b> --Please Select-- ▾
<b>Marital Status</b> --Please Select-- ▾	<b>Ethnicity</b> --Please Select-- ▾
<b>Employed</b> <input type="radio"/> Yes <input type="radio"/> No	<b>Parent</b> --Please Select-- ▾
<b>Monthly Income</b> \$1,000.00	<b>Annual Income</b> 0
<b>Employer</b> <input type="text"/>	<b>Attach Doc</b> <input type="button" value="Choose File"/> No file chosen Up to 25 MB
<b>Signature - Verify all Information is correct.</b>	
<b>Name</b> <input type="text" value="Full Name"/>	
<b>Signature</b> <input type="text"/>	

# 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

### Demographic Information ▾

<b>Gender</b> --Please Select-- ▾	<b>Race</b> --Please Select-- ▾
<b>Marital Status</b> --Please Select-- ▾	<b>Ethnicity</b> --Please Select-- ▾
<b>Employed</b> <input type="radio"/> Yes <input type="radio"/> No	<b>Parent</b> --Please Select-- ▾
<b>Monthly Income</b> \$1,000.00	<b>Annual Income</b> 0
<b>Employer</b> <input type="text"/>	<b>Attach Doc</b> <input type="button" value="Choose File"/> No file chosen Up to 25 MB

**Signature - Verify all Information is correct.**

**Name**

**Signature**

# Expected Behavior – Numeric & Calculation Fields

- Currency, Decimal, Numeric, Calculation fields
- Force uniformed answers
- Good for pulling statistical numbers

Client List ▾

▶ Forms

▾ Filters +

Monthly Income Is Between 800 and 4000

▾ Limit Sections

Report last run May 19th 2023, 2:30 pm

[Click to refresh data](#)

Participant Profile Count

▾ Nonbinary **4**

Q
Displaying 4 of 4 Rows (Expand All Cells)

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
						Average (no zeroes) Monthly Income			
						<b>\$2,325.00</b>			




# Expected Behavior – Date Fields


- Date, Date Dropdown
- Force uniformed answers

Participant Profile


Profile Details ▾


**\*Participant Name** 

First Middle Last

**Intake Date** 

MM/DD/YYYY

**\*Date of Birth** 

MM/DD/YYYY 

**Client Status**

Active

Inactive

Other

**Client Phone Number**

ext.

**How did you hear about us?**

Internet

Newspaper

Radio

Other

**Client Email**

customer\_care@apricot.info

# Expected Behavior – Date Fields

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

The screenshot displays a 'Client List' interface. At the top, there are sections for 'Forms' (Participant Profile, Program Enrollment and Exit), 'Filters' (Intake Date Is Between 01/01/2016 and 12/31/2016), and 'Filter Logic' (1 and 2). Below these is a 'Limit Sections' section. The main part of the interface is a table with the following columns: First, Last, Date of Birth, Intake Date, Enrollment Date, # Days b/n Intake & Enrollment, Client Status, Gender, Monthly Income, Employed, Employer, and Ethnicity. The table contains 8 rows of data. Two callout boxes are present: 'Date Data' points to the 'Date of Birth' and 'Intake Date' columns, and 'Days Between Date Calculation' points to the '# Days b/n Intake & Enrollment' column. The table is titled 'Displaying 8 of 8 Rows (Expand All Cells)'.

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?

<b>Good for Pulling Stats Use if answer is “yes”</b>	<b>Good for Listing Things Use if answer is “No”</b>
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](mailto: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.