

Apricot Linking Data for Effective Reporting

Meet Your Trainer

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Learning Objective

Review best practices for using Linking Fields within the Form Designer of Apricot so that Administrators can make informed decisions when creating or modifying forms.

Agenda

Purpose of Linking Fields

Working with Linking Fields

Testing Your Design

Linking Field Best Practices

Purpose of Linking Fields

Purpose of Linking Fields

- Shows a relationship between records for reporting
- Common Example Households & Participants

Household Profile

Household Details ▶

Family Members ▼

Associated Client Profile Records

Hide Deactivated Links + Add

Participant Profile					Link Info			
Participant Name ▼	Date of Birth ▼	Client Status ▼	Client Email ▼	Gender ▼	Head of Household?	Active ▼	Delete	Date ▼
April Billingslea	04/15/1982	Active	aprilb@yahoo.com	Nonbinary	No ▼	<input checked="" type="checkbox"/>		Added on 01/15/2015
Asher Billingslea	06/09/1984	Active	abilingslea@gmail.com	Male	Yes ▼	<input checked="" type="checkbox"/>		Added on 01/15/2015

Total Active Links:2, Total Deactivated Links:0, Current Active Links:2, Current Deactivated Links:0

Purpose of Linking Fields

- Linked records create ease of navigation

The screenshot displays a user interface for a 'Household Profile'. It includes sections for 'Household Details' and 'Family Members'. The main section is 'Associated Client Profile Records', which contains a table with columns for 'Participant Profile' and 'Link Info'. An orange callout box highlights the first row of the table, indicating that clicking on the record name navigates to the participant profile.

Participant Profile					Link Info			
Participant Name	Date of Birth	Link Status	Client Email	Gender	Head of Household?	Active	Delete	Date
April Billingslea	04/15/1982	Active	aprilb@yahoo.com	Nonbinary	No	<input checked="" type="checkbox"/>		Added on 01/15/2015
Asher Billingslea	06/09/1984	Active	abillingslea@gmail.com	Male	Yes	<input checked="" type="checkbox"/>		Added on 01/15/2015

Total Active Links:2, Total Deactivated Links:0, Current Active Links:2, Current Deactivated Links:0

Purpose of Linking Fields

- Linked records create ease of navigation
- Link can be made from either form

The screenshot shows a 'Participant Profile' form with the following sections:

- Participant Profile** (highlighted with an orange border)
- Profile Details** ▶
- Demographic Information** ▶
- Associated Household** ▼ (highlighted with an orange border)
- Linked Household Profile (Linking Field)** ⓘ (highlighted with an orange border)
- Hide Deactivated Links
- Add** (green button with a plus icon)

Working with Linking Fields

Working with Linking Fields

Linking Field Example:

Link Incoming Referrals to Participant Profiles

Incoming Referral

Incoming Referral Search

-- Add Search Field -- [Browse All](#)

The following 7 Incoming Referral records are available

Client Name ▾	Date Of Birth ▾
Maya Anderson	10/09/1986
Alicia Henry	08/19/1965
Amara Jones	11/02/1990
Isabelle Lopez	09/17/1986
Cat Martin	02/23/2000
Sharon Matthews	03/06/1979
Adam Voght	09/21/1987

Participant Profile

Participant Profile Search

-- Add Search Field -- [Browse All](#)

Showing 1 - 20 of 60 available Participant Profile records

Participant Name ▾	Date Of Birth ▾	Client Status ▾	Client Email ▾
Adam Voght	09/21/1987		adamv@officemail.com
Alicia Henry	08/19/1965	Active	henry.alicia@ymail.com
Alonzo LaBarca	04/03/1998	Active	alonzorocks@mymail.com
Alonzo LaBatsille	03/04/1998	Active	AlonzoL@gmail.com

Working with Linking Fields

Steps:

1. Open the Base Form in the edit view
2. Add linking field to the base form
3. Insert link instructions
4. Select Target Form
5. Set linking relationship
6. Save
7. Publish Base Form
8. Update field properties in the Target Form
9. Publish Target Form

Working with Linking Fields

Step 1. Open the Base Form in the edit view

The screenshot displays the Bonterra Form Designer interface. On the left, a dark sidebar contains a navigation menu with the following items: 'Form Designer' (expanded), 'Standard Forms' (highlighted with an orange box and a '1' in a circle), 'Templates', 'Queries', 'Lookup Lists', and 'Users Form'. The main content area is titled 'Standard Forms' and features a dark teal header with the text 'Select the Form You Wish to Modify Below'. Below this header, a list of forms is shown, each with a green up arrow icon and a right-pointing chevron: 'Participant Profile', 'Incoming Referral' (highlighted with a grey background), 'Household Profile', and 'Caseworker Profile'. To the right of the 'Incoming Referral' form, an 'Actions' dropdown menu is open, showing options: 'Edit' (highlighted with an orange box and a '2' in a circle), 'New Tier 2', and 'From Scratch'.

Working with Linking Fields

Step 1. Open the Base Form in the edit view

Step 2. Add the linking field to the form

The screenshot displays the Bonterra form editor interface. The main form is titled "Incoming Referral" and contains two sections: "Main Contact Info" and "Referral Status Details". The "Referral Status Details" section includes a "Status" field with two radio button options: "Enrolling in Program" and "Declined Offer". Below this is a "Link Instructions" field, which is highlighted with an orange box and a circled "2". To the right of the form is a sidebar titled "COLLAPSE ALL" with a "Field Choices" dropdown menu. The "Field Choices" menu is open, showing a list of field types: Demographic, Option, Text, Numeric, Calculation, Date and Time, Upload, Hyperlink, Linking, and Special. The "Linking" category is expanded, showing sub-options: Auto Populate, Dynamic Checkboxes, Dynamic Dropdown, Link, and Special. The "Link" option is highlighted with an orange box and a circled "1". At the bottom of the sidebar are two buttons: "+ Add Section" and "Registration".

Working with Linking Fields

Step 3: Insert Link Instructions

Incoming Referral

Main Contact Info ▶

Referral Status Details

Status

- Enrolling in Program
- Declined Offer

Link Instructions

Field Properties (link)

Display Name

Link Instructions

Standard Properties

- Required
- Duplicate Check
- Locked
- Quick View
- Searchable
- Hidden
- Restricted
- Clear On Copy

Linked To

-- Please Select -- 1 1

This is required record(s) can be linked to each of these records of these records can be linked to each record

Working with Linking Fields

Step 4: Select Target Form

Incoming Referral

Main Contact Info ▶

Referral Status Data

Status

- Enrolling in Program
- Declined Offer

Link Instructions

Field Properties (link)

Display Name
Link Instructions

Standard Properties

- Required
- Duplicate Check
- Locked
- Quick View
- Searchable
- Hidden
- Restricted
- Clear On Copy

Linked To

-- Please Select -- 1 1

This is required

record(s) can be linked to each of these records

of these records can be linked to each record

Working with Linking Fields

Step 5: Set the Linking Relationship

Step 6: Save

Step 7: Publish the Form

The screenshot shows the 'Field Properties (link)' dialog box with the following settings:

- Display Name:** Click to select Participant Profile
- Standard Properties:**
 - Required
 - Duplicate Check
 - Locked
 - Quick View
 - Searchable
 - Hidden
 - Restricted
 - Clear On Copy
- Linked To:** Participant Profile (dropdown), 1 (dropdown), 1 (dropdown). A tooltip for the second '1' dropdown reads: "1 record(s) can be linked to each of these records" and "1 of these records can be linked to each record". A red circle with the number '5' is next to this section.
- Number of Links per page:** 5 (dropdown)
- Special Properties:**
 - Wizard Style (enables wizard style linking)
 - Show Associated Records (show other records of THIS form that are linked to the same record)
 - Show Link Description (allow users to specify additional information to identify each link)
- Tooltip:** (empty text box)

At the bottom, there are 'Delete' and 'Apply' buttons. A red circle with the number '6' is next to the 'Apply' button.

Working with Linking Fields

Step 8: Update Field Properties of the Target Form

Step 9: Publish the Target Form.

The screenshot displays a software interface for managing a 'Participant Profile' form. The main interface has a dark teal header with 'Participant Profile' and a gear icon. Below the header are several menu items: 'Profile Details', 'Demographic Information', 'Linked 'Incoming Referral' Records', 'Associated Household', and 'System Fields'. The 'Linked 'Incoming Referral' Records' menu item is highlighted with a green border. A modal dialog box titled 'Field Properties (target link)' is open over the 'Link Instructions' field. The dialog box contains the following fields and options:

- Display Name:** A text input field containing 'Link Instructions'.
- Standard Properties:** A group of checkboxes including:
 - Required
 - Duplicate Check
 - Locked
 - Quick View
 - Searchable
 - Hidden
 - Restricted
 - Clear On Copy
- Linked To:** A dropdown menu showing 'Incoming Referral'.
- Number of Links per page:** A dropdown menu showing '5'.
- Special Properties:** A checkbox for 'Show Associated Records (show other records of THIS form that are linked to the same record)'.
- Tooltip:** An empty text input field.

At the bottom of the dialog box are two buttons: 'Deactivate' and 'Apply'.

Testing Your Design

Testing Your Design

Access the Data Entry Tab
Enter Fake Incoming Referral

Incoming Referral

Main Contact Info ▾

All information is confidential and will not be shared without your written consent.

***Intake Date**

***Client Name**

***Date of Birth**

Cell Phone ext.

Work Phone ext.

How did you hear about us?

- Internet
- Newspaper
- Outreach Event
- Other

Email

Demographics ▶

Referral Status Details ▾

Status

- Enrolling in Program
- Declined Offer

Click to select Participant Profile

Hide Deactivated Links

Best Practice

Best Practice – Same Folder Linking

Linking Field Property

Helpful when linking two Tier 2 Forms

Field Properties (link)

Display Name
Associated Services

Standard Properties

Required Duplicate Check Locked
 Quick View Searchable Hidden
 Restricted Clear On Copy

Linked To

Services Many Many
Services record(s) can be linked to each of these records of these records can be linked to each Services record

Number of Links per page
5

Special Properties

Same Folder Linking
(only allow links to records in the same folder)

Wizard Style
(enables wizard style linking)

Show Associated Records
(show other records of THIS form that are linked to the same record)

Show Link Description
(allow users to specify additional information to identify each link)

Best Practice – Same Folder Linking

Linking Field Property

Helpful when linking two Tier 2 Forms

Narrows search results

The screenshot displays a user interface for a service provider named Alonzo LaBatsille. A search modal titled "Program Enrollment and Exit Search" is open, showing a search dropdown menu and a "Browse All" button. Below the search, it states "The following records are available" and "Program Enrollment and Exit (2 records)". A table lists the records:

Program	Enrollment Date	Exit Date
Counseling	02/23/2016	
Workforce Training	09/02/2016	

At the bottom of the search modal, there is a checkbox for "Hide Deactivated Links" and an "Add" button.

Best Practice – Same Folder Linking

Same Folder Linking Property **NOT** enabled

The screenshot displays a web application interface for 'Program Enrollment and Exit Search'. On the left, a sidebar shows 'Services' with a search for 'Alonzo LaBatsille' and a 'Quick View Information' button. The main content area has a search bar with 'Alonzo LaBatsille' entered and a 'Link All' button. Below the search bar, there is a dropdown menu for adding search fields and a 'Browse All' button. The text 'Showing 1 - 10 of 60 available Participant Profile records' is displayed above a table of participant records. The table has columns for 'Participant Name', 'Date Of Birth', and 'Client Status'. The record for 'Alonzo LaBarca' is highlighted in orange. Below the table, a section titled 'Displaying 1 Program Enrollment and Exit record.' shows a table with columns for 'Program', 'Enrollment Date', and 'Exit Date'. The record for 'Workforce Assistance' is shown with an enrollment date of '02/03/2015'. The table of participant records continues below, with 'Alonzo LaBatsille' highlighted in orange.

	...	(new)	Participant Name ▾	Date Of Birth ▾	Client Status ▾
▶	1	(new)	Adam Voght	09/21/1987	
▶	1	(new)	Alicia Henry	08/19/1965	Active
▼	1	(new)	Alonzo LaBarca	04/03/1998	Active

Displaying 1 Program Enrollment and Exit record. [More Columns...](#)

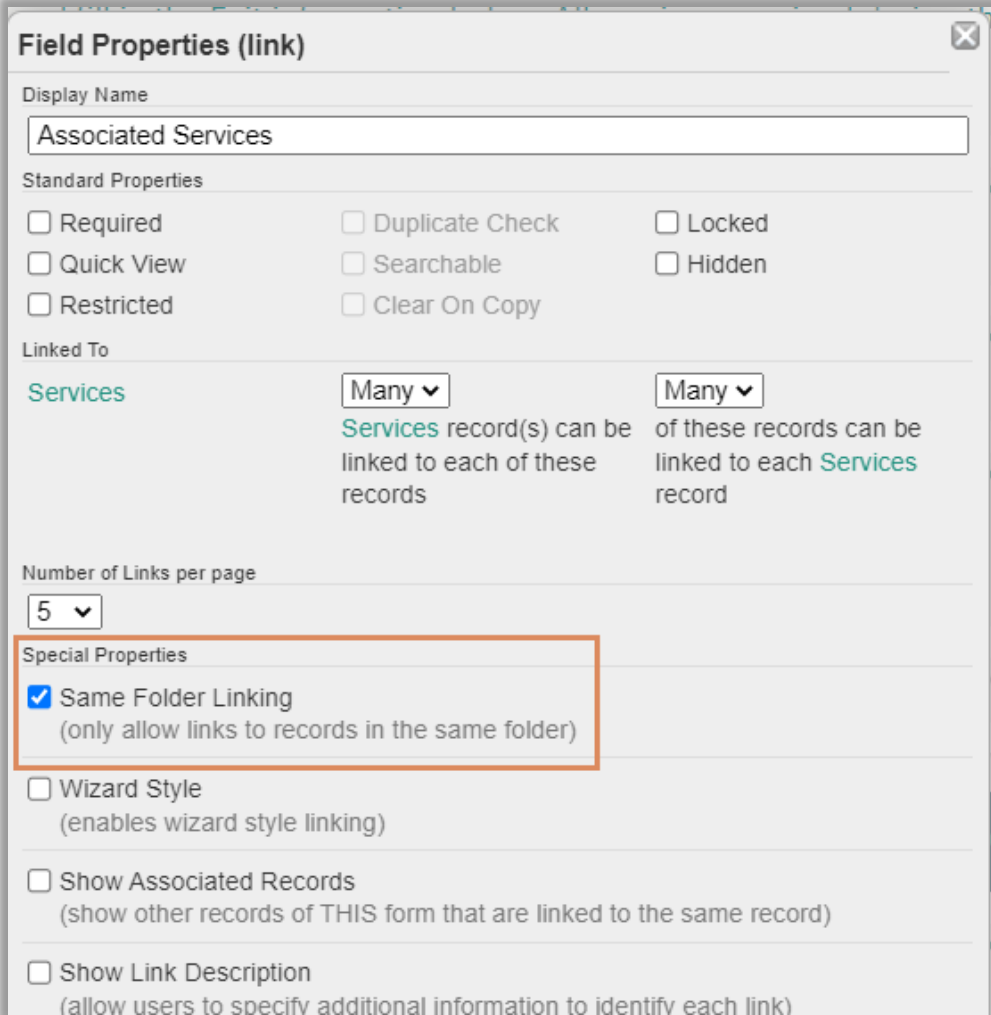
Program	Enrollment Date	Exit Date
Workforce Assistance	02/03/2015	

▶	2	(new)	Alonzo LaBatsille	03/04/1998	Active
		(new)	Alvy Singer	10/01/1978	pending

Best Practice – Same Folder Linking

Same Folder Linking Property **NOT** enabled

Turn on via Field Properties



The screenshot shows the 'Field Properties (link)' dialog box with the following settings:

- Display Name: Associated Services
- Standard Properties:
 - Required
 - Duplicate Check
 - Locked
 - Quick View
 - Searchable
 - Hidden
 - Restricted
 - Clear On Copy
- Linked To:
 - Services
 - Many
 - Services record(s) can be linked to each of these records
 - Many
 - of these records can be linked to each Services record
- Number of Links per page: 5
- Special Properties:
 - Same Folder Linking (only allow links to records in the same folder)
 - Wizard Style (enables wizard style linking)
 - Show Associated Records (show other records of THIS form that are linked to the same record)
 - Show Link Description (allow users to specify additional information to identify each link)

Best Practice – Same Folder Linking

Same Folder Linking Property **NOT** enabled

Same Folder Linking Property **IS** enabled

Services

Alonzo LaBatsille

Quick View Information ▶

Service Information ▶

Service Notes ▶

Linked 'Program Enrollment and Exit Search

Program providing service

Program Enrollment and Exit Search

-- Add Search Field -- ▾ Browse All

The following records are available

Program Enrollment and Exit (2 records)

Program ▾	Enrollment Date ▾	Exit Date
Counseling	02/23/2016	
Workforce Training	09/02/2016	

Hide Deactivated Links + Add

Best Practice – Wizard Linking

Field Property

Field Properties (link)

Display Name
Individual Goal Setting

Standard Properties

Required Duplicate Check Locked
 Quick View Searchable Hidden
 Restricted Clear On Copy

Linked To

Goals Many Many
record(s) can be linked to of these records can be
each of these records linked to each record

Number of Links per page
5

Special Properties

Same Folder Linking
(only allow links to records in the same folder)

Wizard Style
(enables wizard style linking)

Show Associated Records
(show other records of THIS form that are linked to the same record)

Show Link Description
(allow users to specify additional information to identify each link)

Tooltip

Delete Apply

Best Practice – Wizard Linking

Field Property

Displays a +New button

Improve workflow

The screenshot displays a user interface for an Individual Service Plan (ISP) for Alonzo LaBatsille. The interface is organized into a vertical stack of sections:

- Individual Service Plan (ISP)**: The main title at the top.
- Alonzo LaBatsille**: The user's name, with a "Quick View Information" link below it.
- Main**: A dark teal button with a right-pointing arrow.
- Plan Details and Narrative**: A dark teal button with a right-pointing arrow.
- Goal Setting**: A dark teal button with a downward-pointing arrow.
- Individual Goal Setting**: A white box with an orange border containing:
 - A checkbox labeled "Hide Deactivated Links" which is checked.
 - A green button with a white plus sign and the text "New".

Best Practice – Wizard Linking

Steps:

1. Open desired Form in Edit view
2. Add Linking field
3. Manage Standard Field Properties
4. Check Wizard Style option under Special Properties
5. Apply
6. Publish

The screenshot shows the 'Field Properties (link)' dialog box. It has a title bar with a close button and a tab labeled 'Field Properties (link)'. The dialog is divided into several sections:

- Display Name:** A text input field.
- Standard Properties:** A group of checkboxes including 'Required', 'Quick View' (checked), 'Restricted', 'Duplicate Check', 'Searchable', 'Clear On Copy', 'Locked', and 'Hidden'.
- Linked To:** A dropdown menu followed by two 'Many' dropdowns. Below them, text reads: 'record(s) can be linked to each of these records' and 'of these records can be linked to each record'.
- Number of Links per page:** A dropdown menu set to '5'.
- Special Properties:** A group of checkboxes including 'Same Folder Linking', 'Wizard Style' (checked), 'Show Associated Records', and 'Show Link Description'.
- Tooltip:** A text input field.
- Buttons:** 'Delete' and 'Apply' buttons at the bottom right.

Numbered callouts are present: '3' points to the title bar, '4' points to the 'Wizard Style' checkbox, and '5' points to the 'Apply' button.

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.