

# Building Reports to Pull Record IDs for Import

## Apricot Targeted Webinar

# Meet Your Trainer

Annie Novacek

Sr. Training Specialist

[ClientTrainingRequests@BonterraTech.com](mailto:ClientTrainingRequests@BonterraTech.com)



# Learning Objective

This training will cover how to build a basic report of Record IDs that you can use when importing data into the system.

This would be useful when:

- Replacing a field in an existing form form and,
- Importing data for existing participants

# Agenda

Record IDs

Building Record ID Reports

# Record IDs

# Record IDs

- Unique number automatically generated by Apricot
- Each Tier 1 and Tier 2 form will have a unique record ID associated to it
- Found at the bottom of a form under "System Fields"

Program Enrollment

Leo Dodds  
Quick View Information ▶

Enrollment ▶

Exit ▶

System Fields ▼

| Record ID | Modification Date      | Modified By | Creation Date          | Created By  | Assigned Programs |
|-----------|------------------------|-------------|------------------------|-------------|-------------------|
| 2569      | 02/15/2024 2:04 PM CST | Megan Dodds | 02/15/2024 2:04 PM CST | Megan Dodds | - Intake          |

# Record IDs in Report Builder

- Record IDs can be pulled into a report as an identifier field

The screenshot displays the 'Missing Data' report builder interface. On the right, the 'Field Choices' panel is highlighted with a red box, showing a tree view under 'Participant' with 'Record ID' selected. Below this, the 'Requirements' section shows 'All checks passed' and the 'Report Actions' section includes buttons for 'Add New Section', 'Save Report', 'Copy Report', 'Publish Report', and 'Revert Report'. The main report area shows a table with columns: 'Record ID', 'Record ID', 'Service Provided', and 'Total Time'. The first 'Record ID' column is highlighted with a red box. At the bottom, a message states 'Report last run May 9th 2024, 12:54 pm' and 'Auto run has been turned off for this section. Click here to turn it back on.'

# Building Record ID Reports



# Report for Replacing an Existing Field

- Build a report that includes the following fields from the Form you just edited:
  - Record ID (under system fields)
  - Original Field
- Publish and run report
- Under Report Actions, select “Export”
- Save this file

The screenshot shows a report interface for 'Replacing Field Types'. The report title is 'Replacing Field Types'. Below the title, there are sections for 'Forms' (Request for Services), 'Filters', and 'Limit Sections'. A message indicates the report was last run on May 8th 2024 at 12:07 pm, with a 'Click to refresh data' link. A search bar is present, and the report is displaying 2 of 2 rows. The table has two columns: 'Record ID' and 'I am interested in services for:'. The data rows are: 2605 (Myself) and 2606 (Myself). A 'Total Rows' box shows 2. On the right, the 'Report Actions' sidebar includes: Edit, Refresh All Sections, Print Mode, Export, Full Screen, Reset Filters, and Return to List. Red circles with numbers 1, 2, and 3 highlight the 'Record ID' column header, the 'I am interested in services for:' column header, and the 'Export' button in the sidebar, respectively.

| Record ID | I am interested in services for: |
|-----------|----------------------------------|
| 2605      | Myself                           |
| 2606      | Myself                           |

# 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)

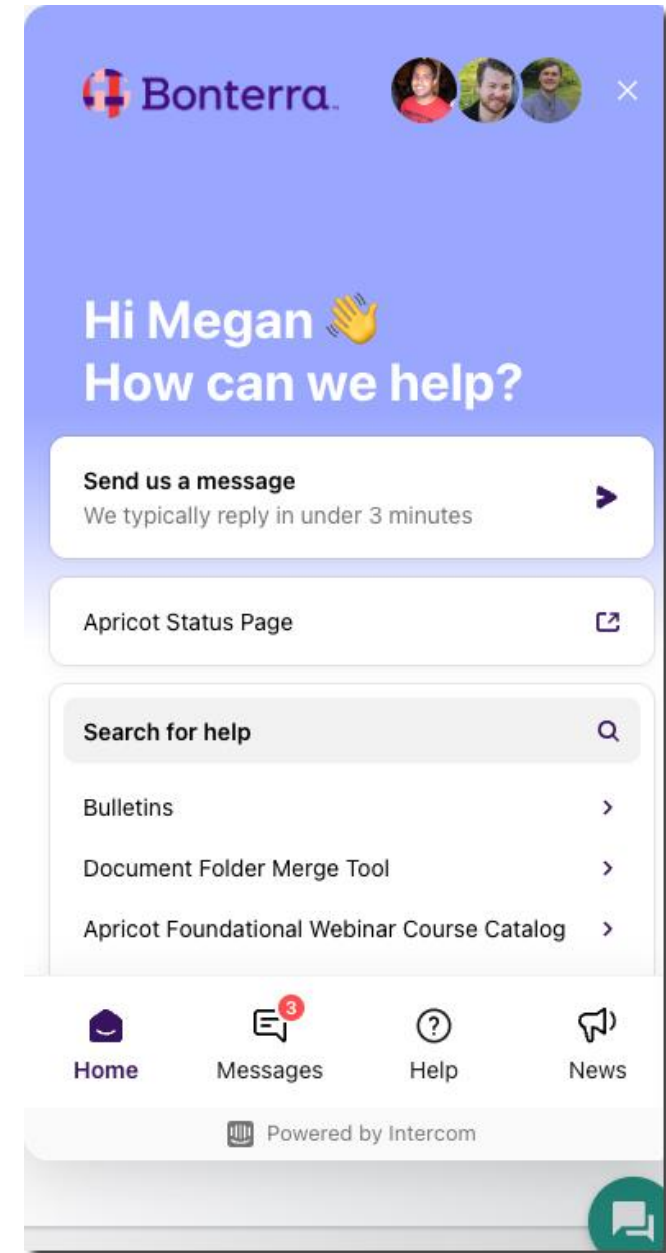


Build confidence & knowledge in  
our software!

# 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.