Apricot
Extracting Your Data: A Best Practice Guide for Building Reports

Bonterra™

Meet Your Trainer

First Name Last Name

Training & Development Associate

Learning Objective

Review foundational skills and expected behavior of the Report Builder in Apricot so that Administrators can make informed decisions when creating or modifying reports.

Agenda

- Purpose
- Structure of Report Builder
- Building Reports
- Formatting Reports

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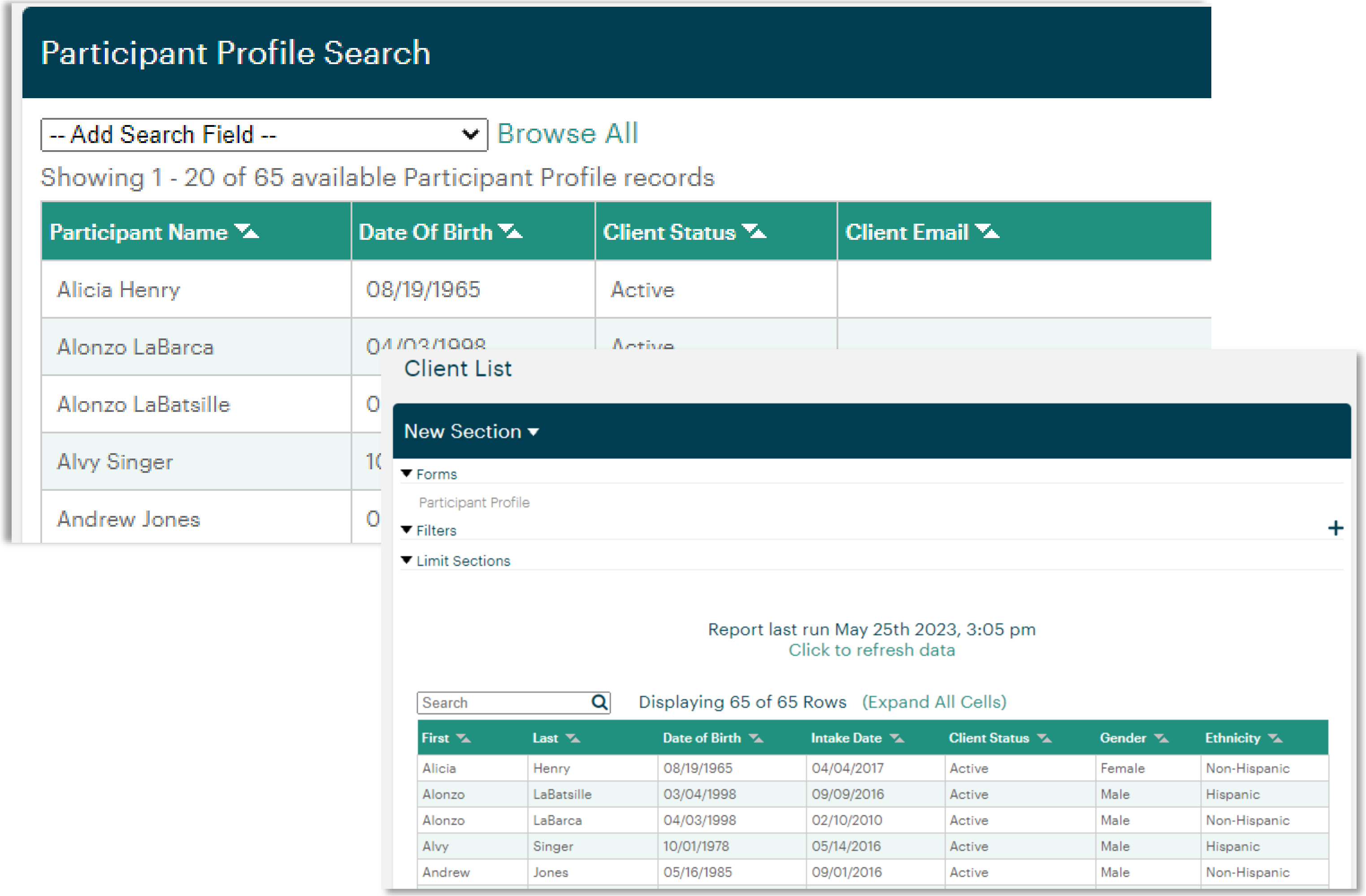
Purpose of the Report Builder

Purpose of the Report

Retrieve records created via Forms in the system



Structure of the Report Builder

Structure of the Report

1. Title
2. Section
3. Graph
4. Group Drilldown
5. Table

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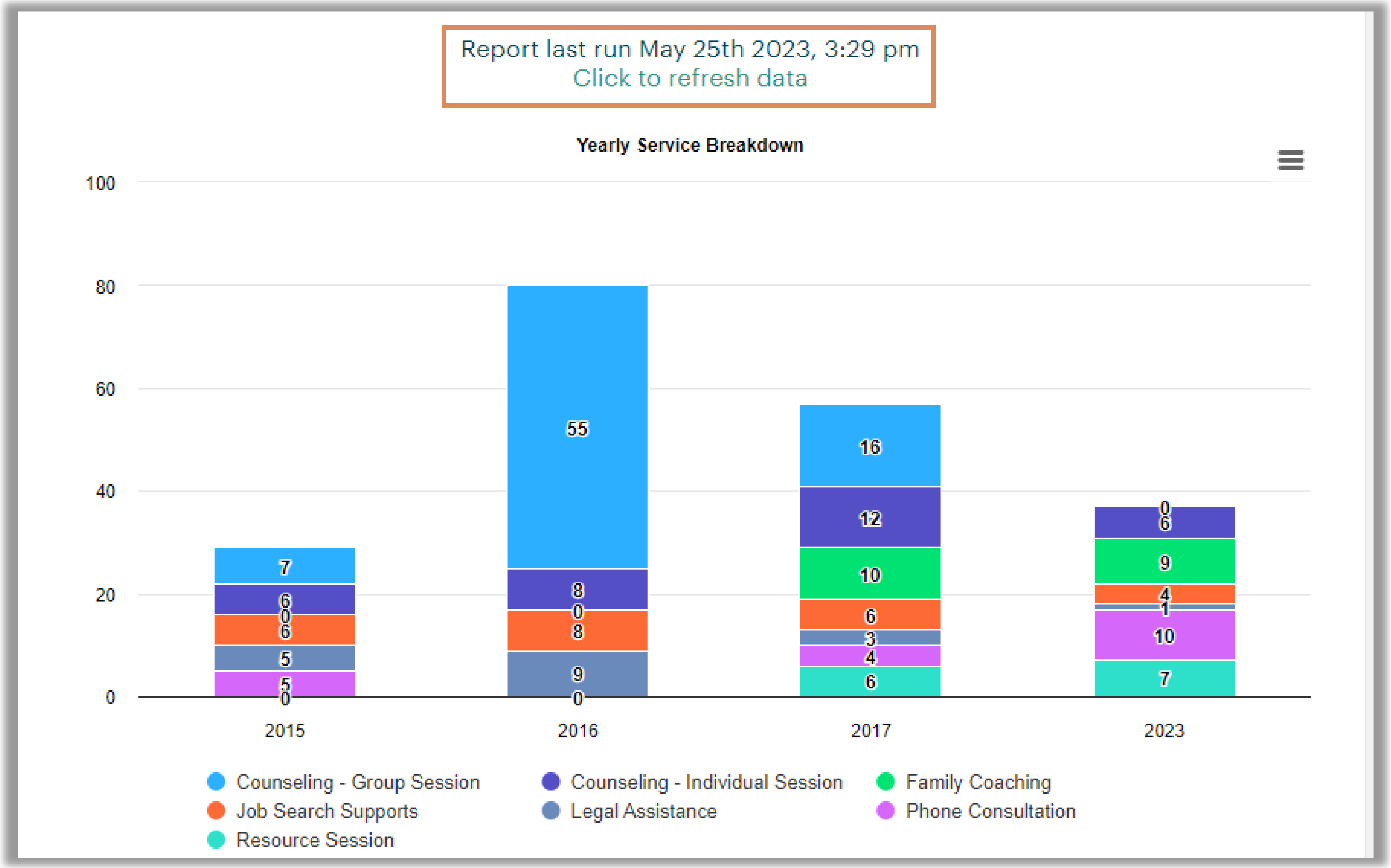
Structure of the Report

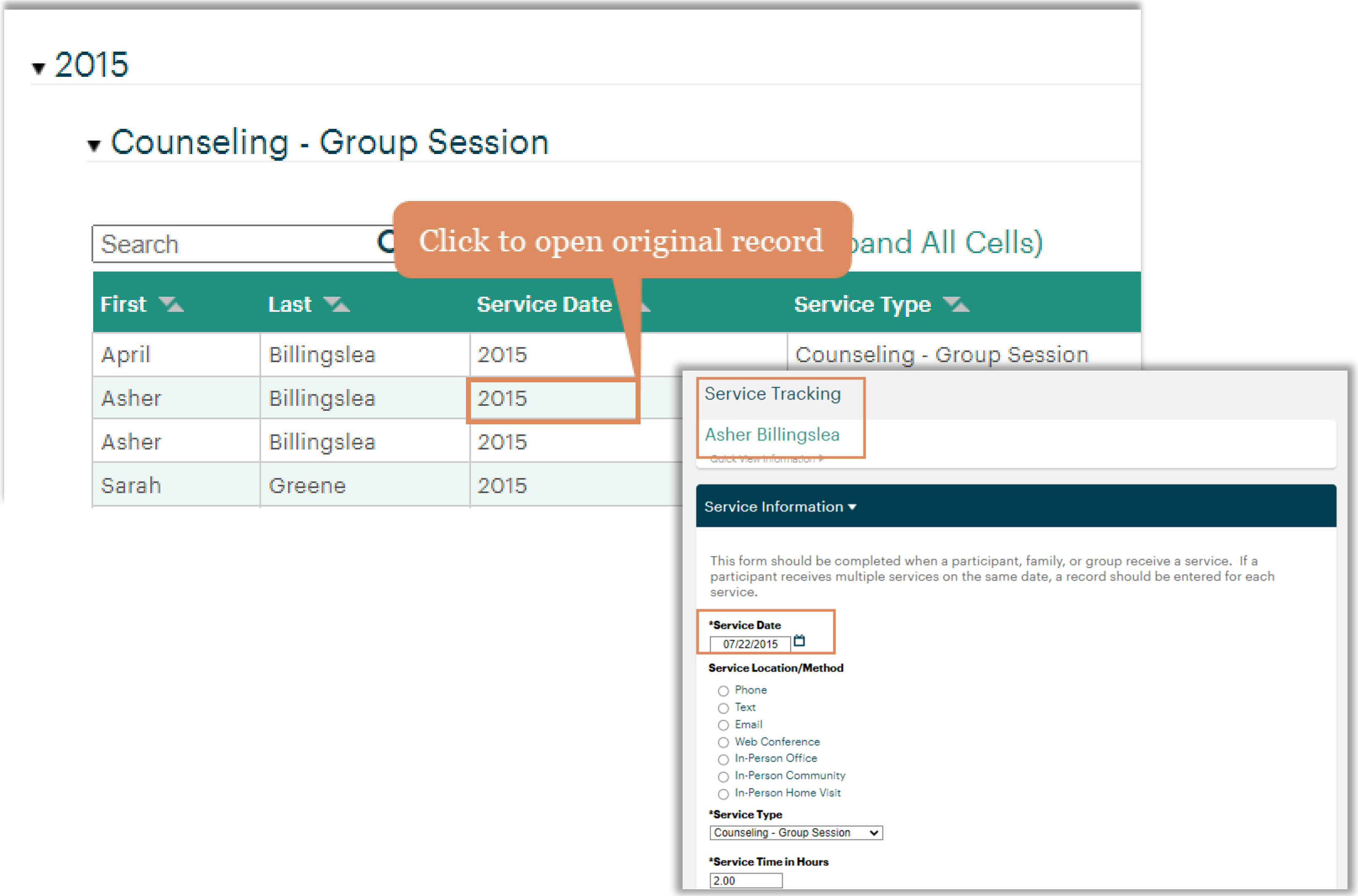
Data is current as of run time



Structure of the Report

Data is current as of run time

Data is functional

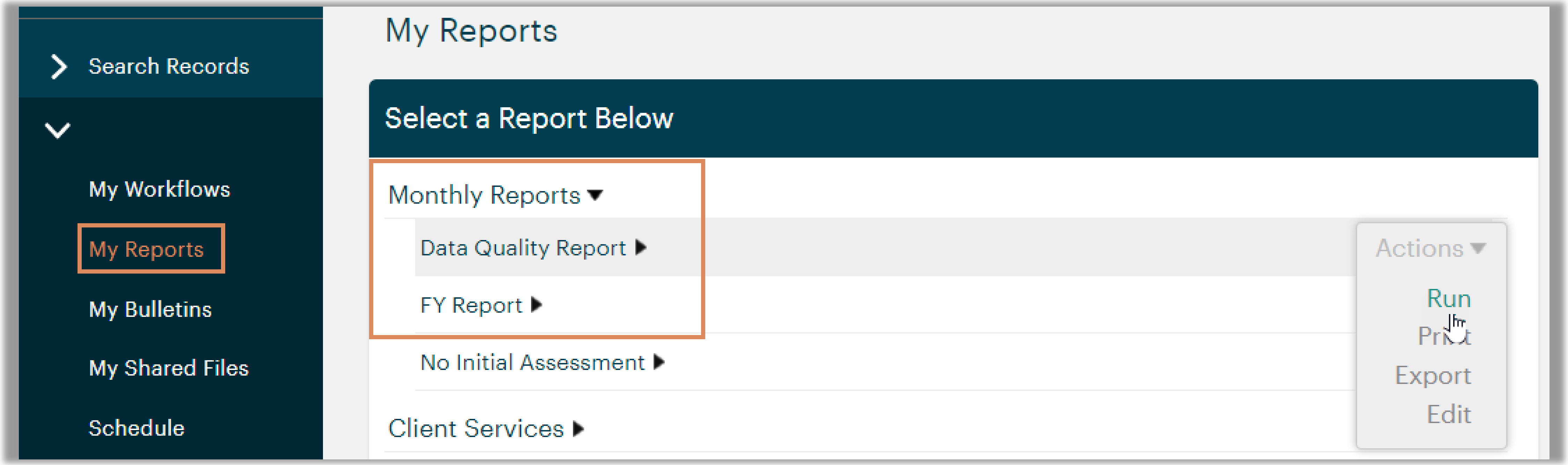


Structure of the Report

Data is current as of run time

Data is functional

Great for Cyclical Reports



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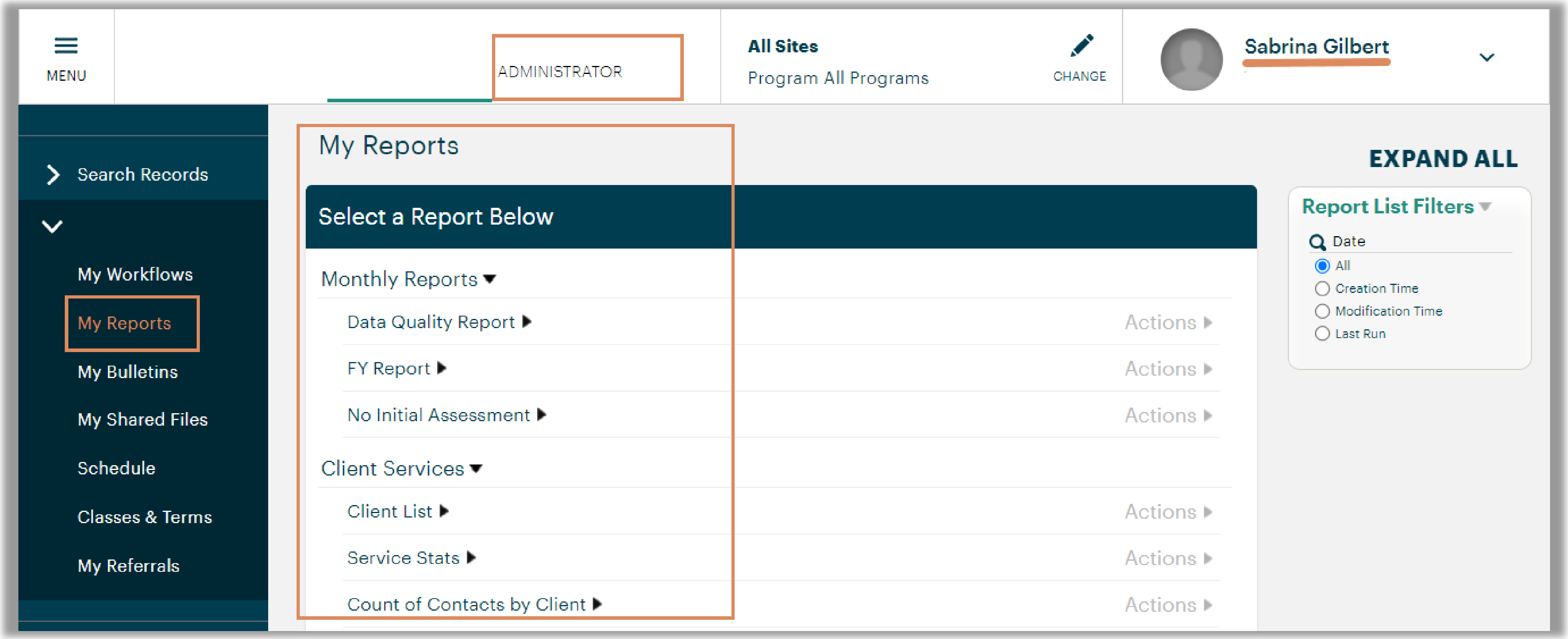
Structure of the Report

Only Admins can run reports by default



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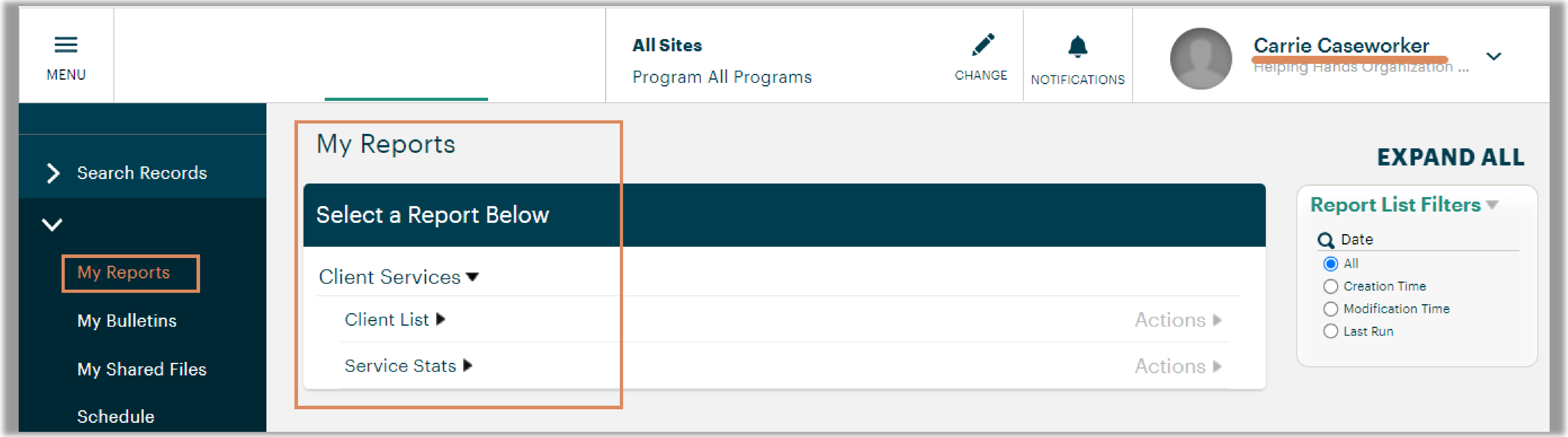
Structure of the Report

Only Admins can run reports by default

Admins can grant Standard Users access

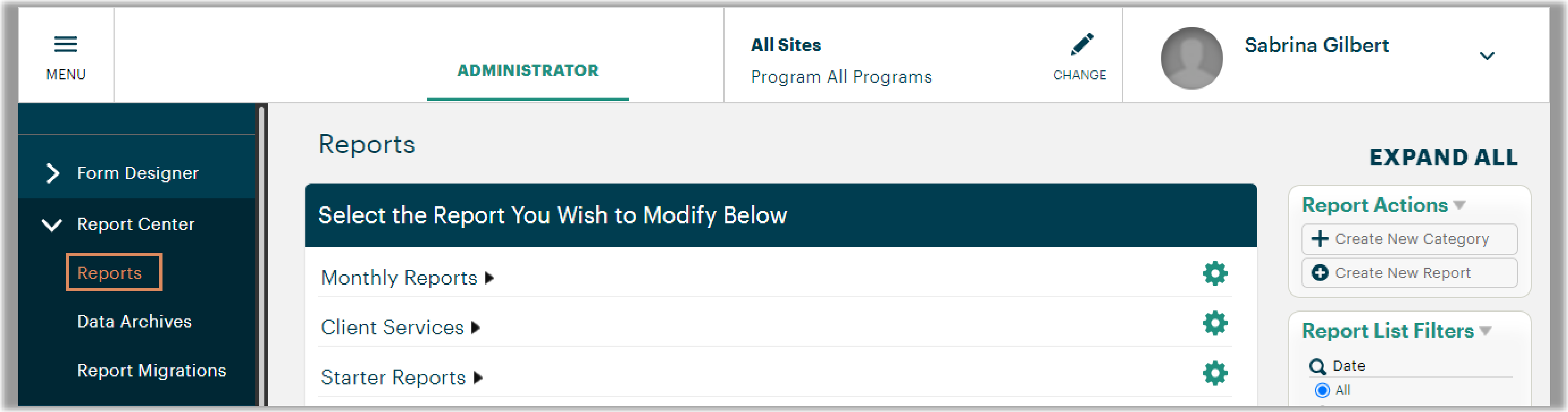


Building Reports

Building Reports

Admin only by default

Accessed via Report Center



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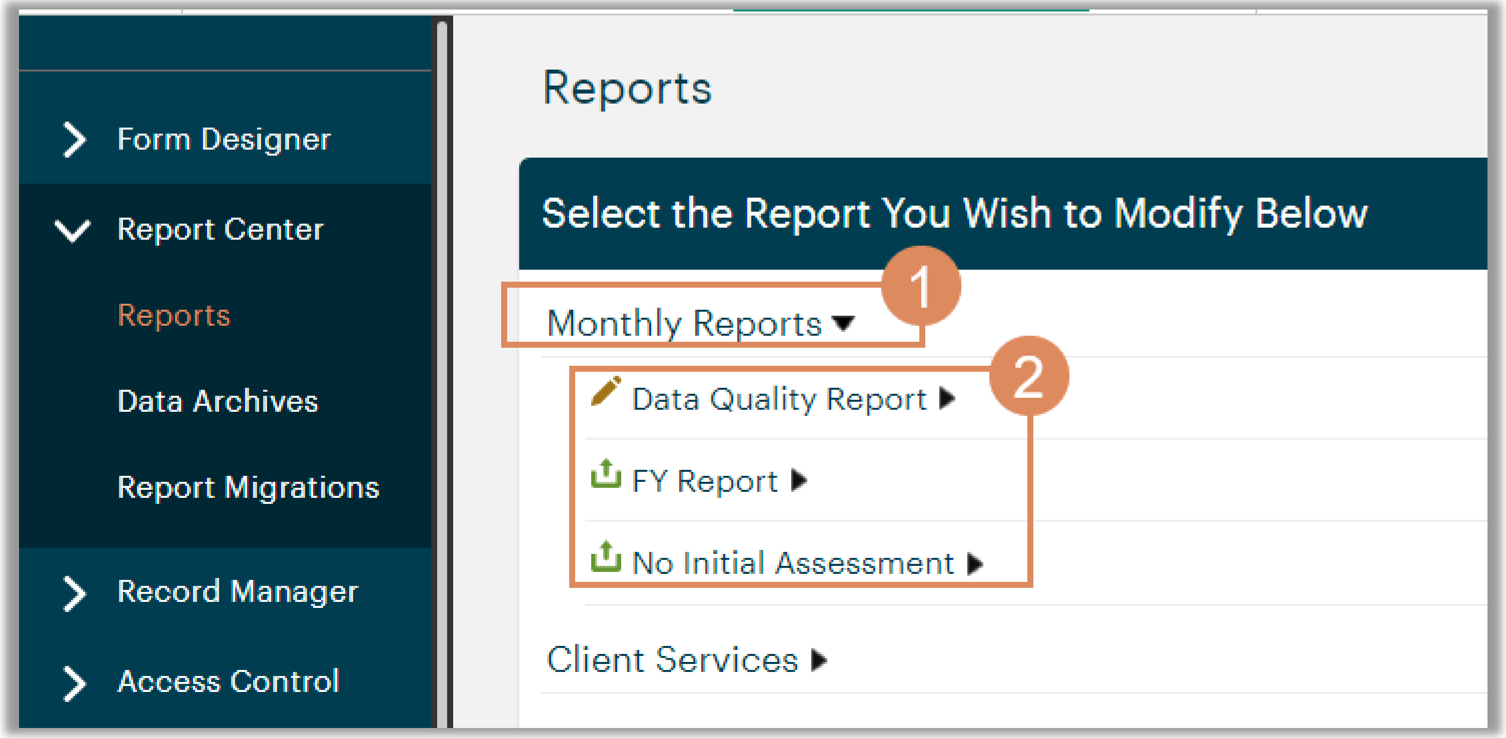
Building Reports

1. Report Category
2. Report



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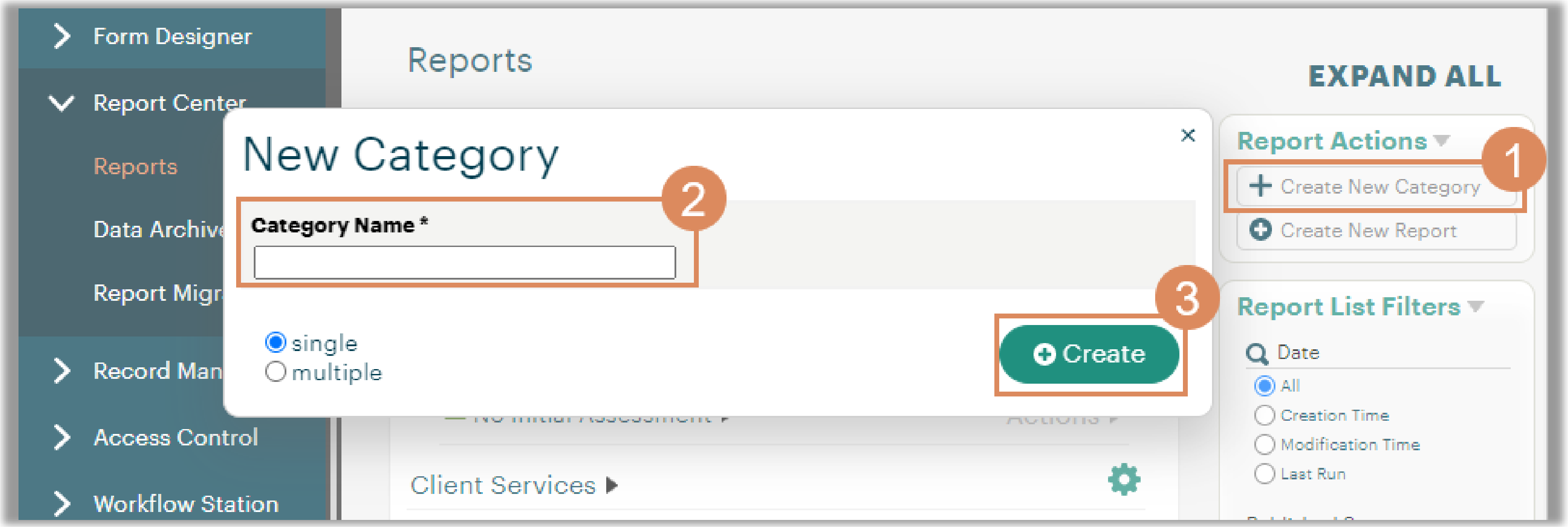
Building Reports

<u>Steps to Create a New Category</u>

1. Create New Category
2. Name Category
3. Create



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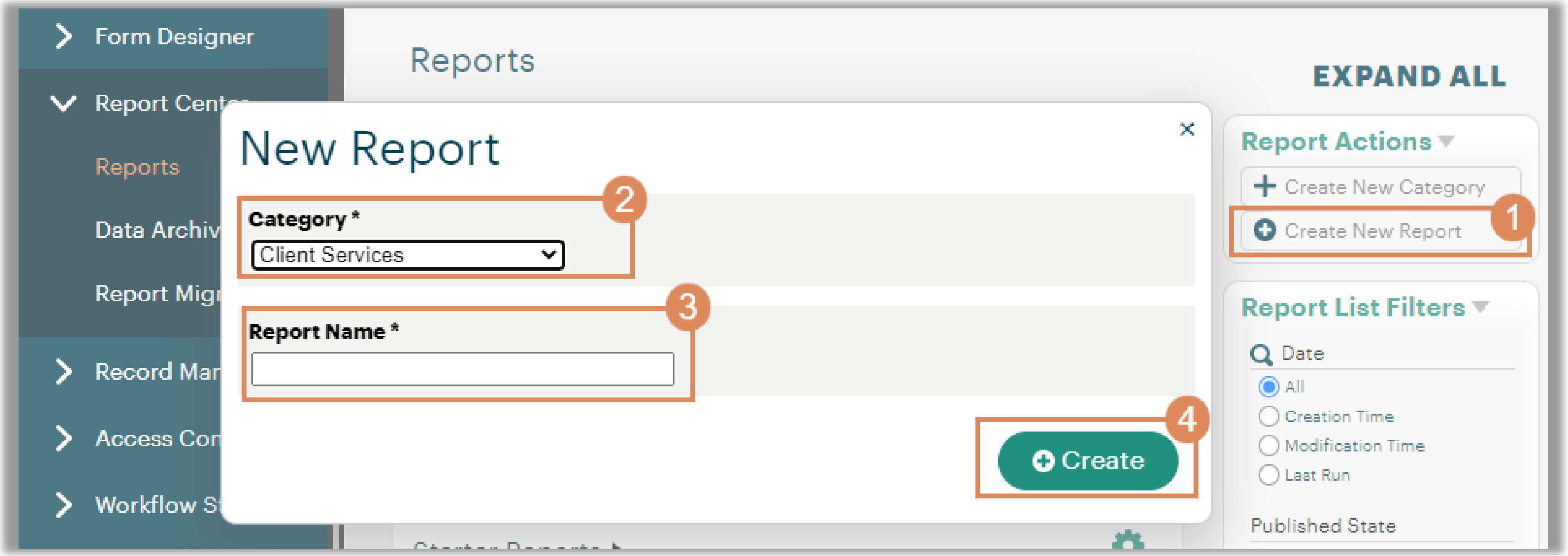
Building Reports

<u>Steps to Start Creating a New Report</u>

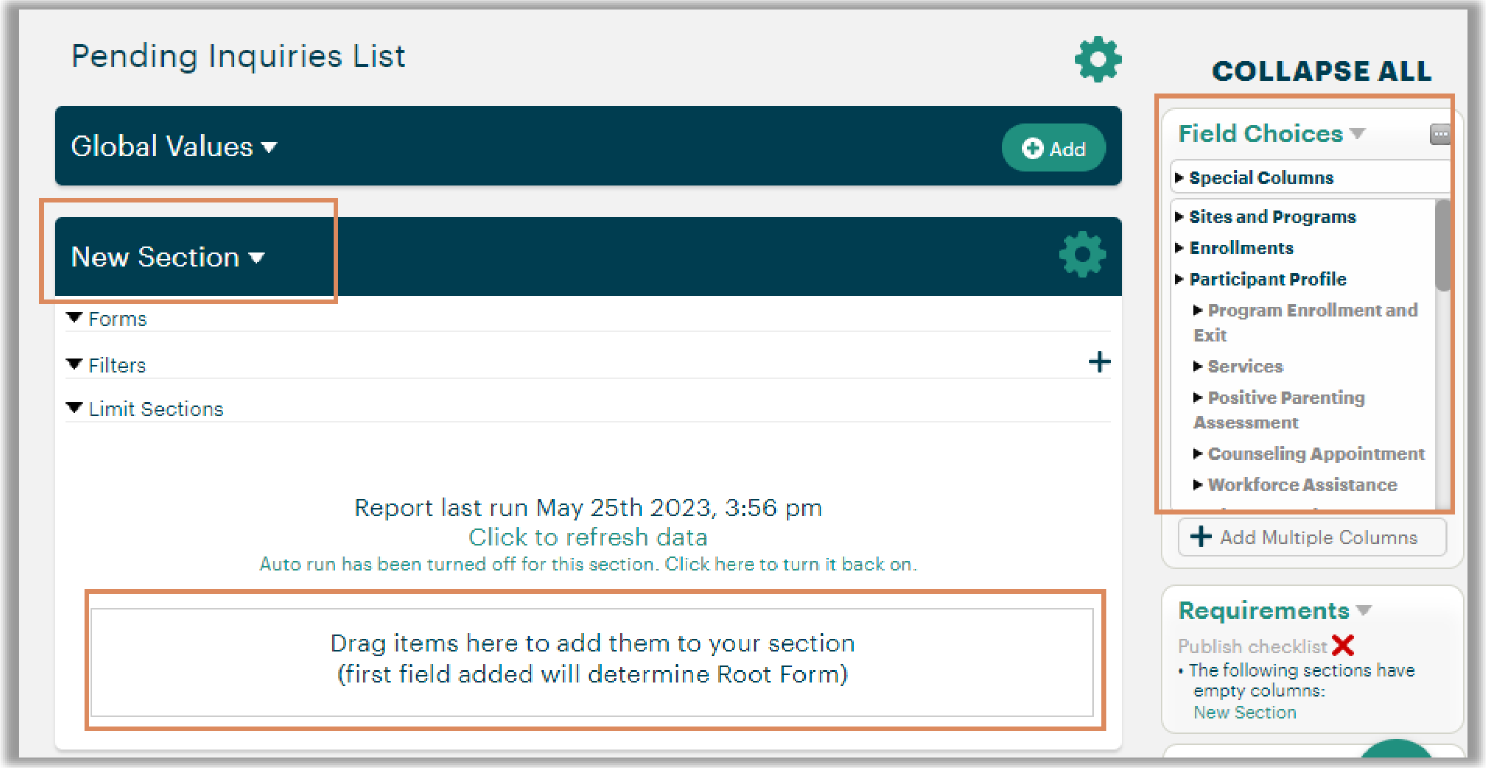
1. Create New Report
2. Assign to Category
3. Name Report



Building Reports

One blank section by default

Drag and drop datapoints from field choices palette



Building Reports

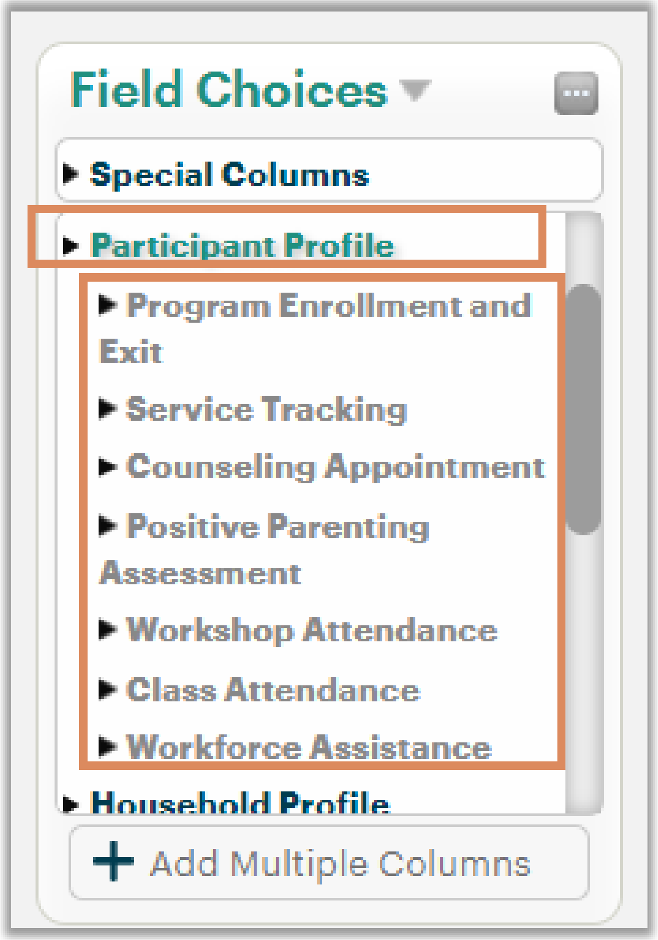
<u>Questions to ask when designing reports:</u>

1. What forms are we using to track the metrics I want?
2. Which questions on those forms demonstrate the requested outcome(s) and/or information?
3. How specifically are we defining any subjective terms in the request (i.e., active, enrolled, successful completion)?

Building Reports

Tier 1 Forms first

Tier 2 Forms underneath



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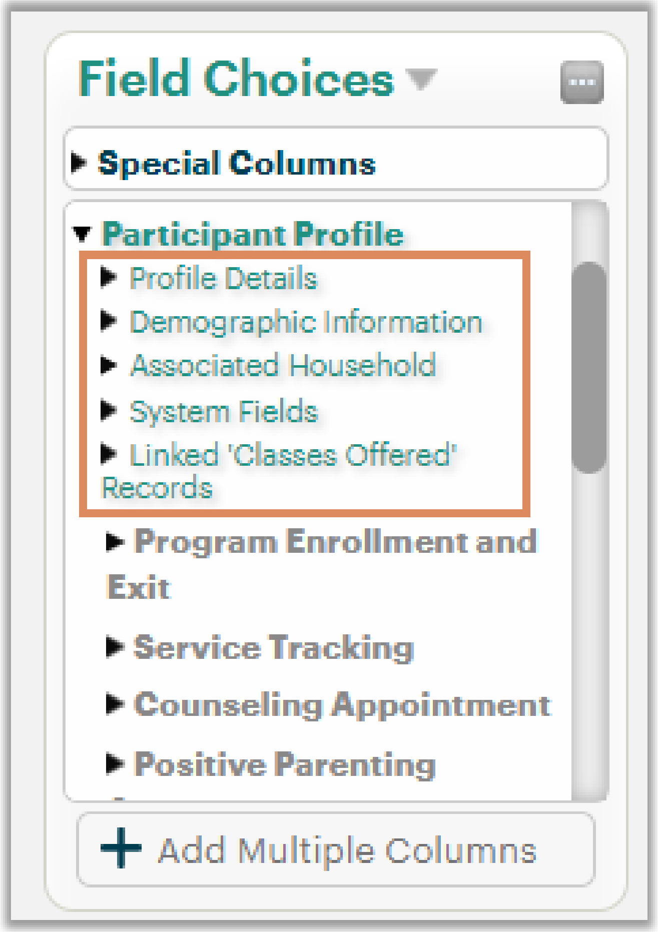
Building Reports

Tier 1 Forms first

Tier 2 Forms underneath

Click Form to see form section



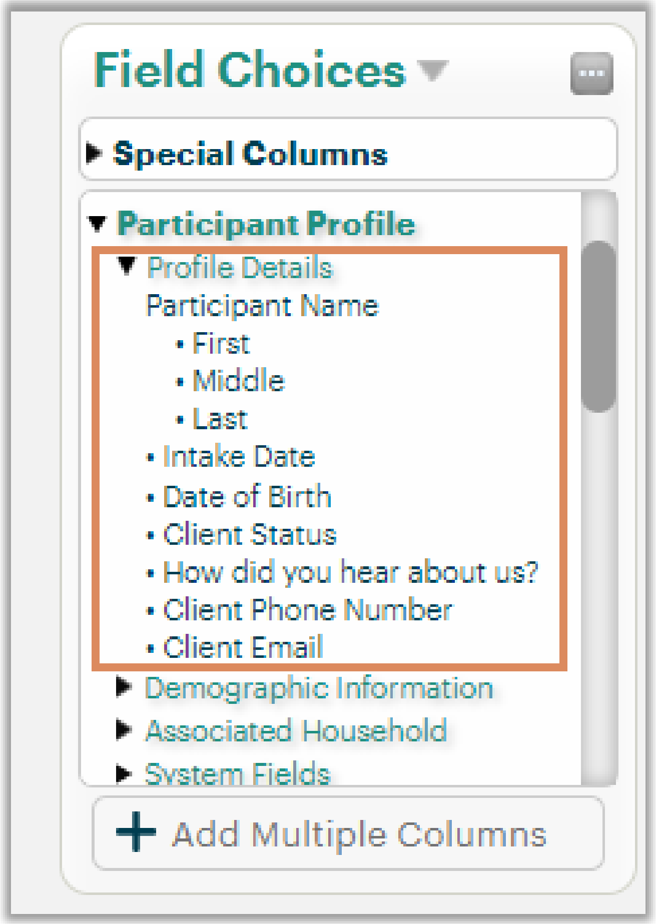
Building Reports

Tier 1 Forms first

Tier 2 Forms underneath

Click Form to see form section

Click Form section to see fields



Building Reports

Tier 1 Forms first

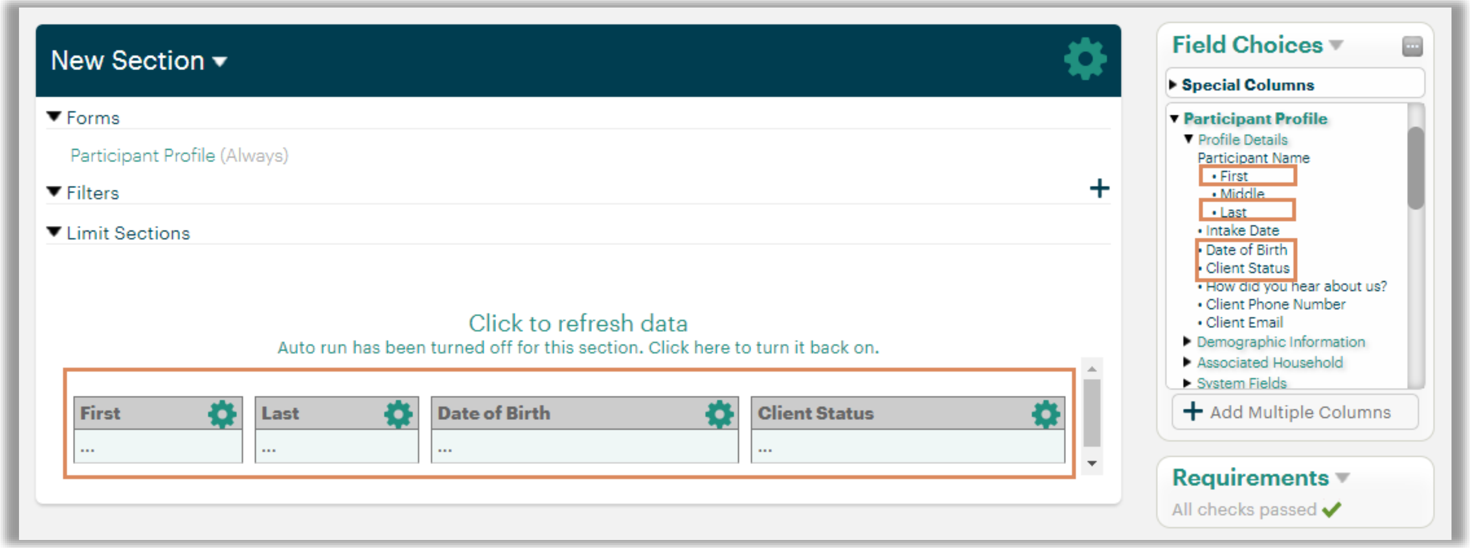
Tier 2 Forms underneath

Click Form to see form section

Click Form section to see fields

Drag field to report section to make column

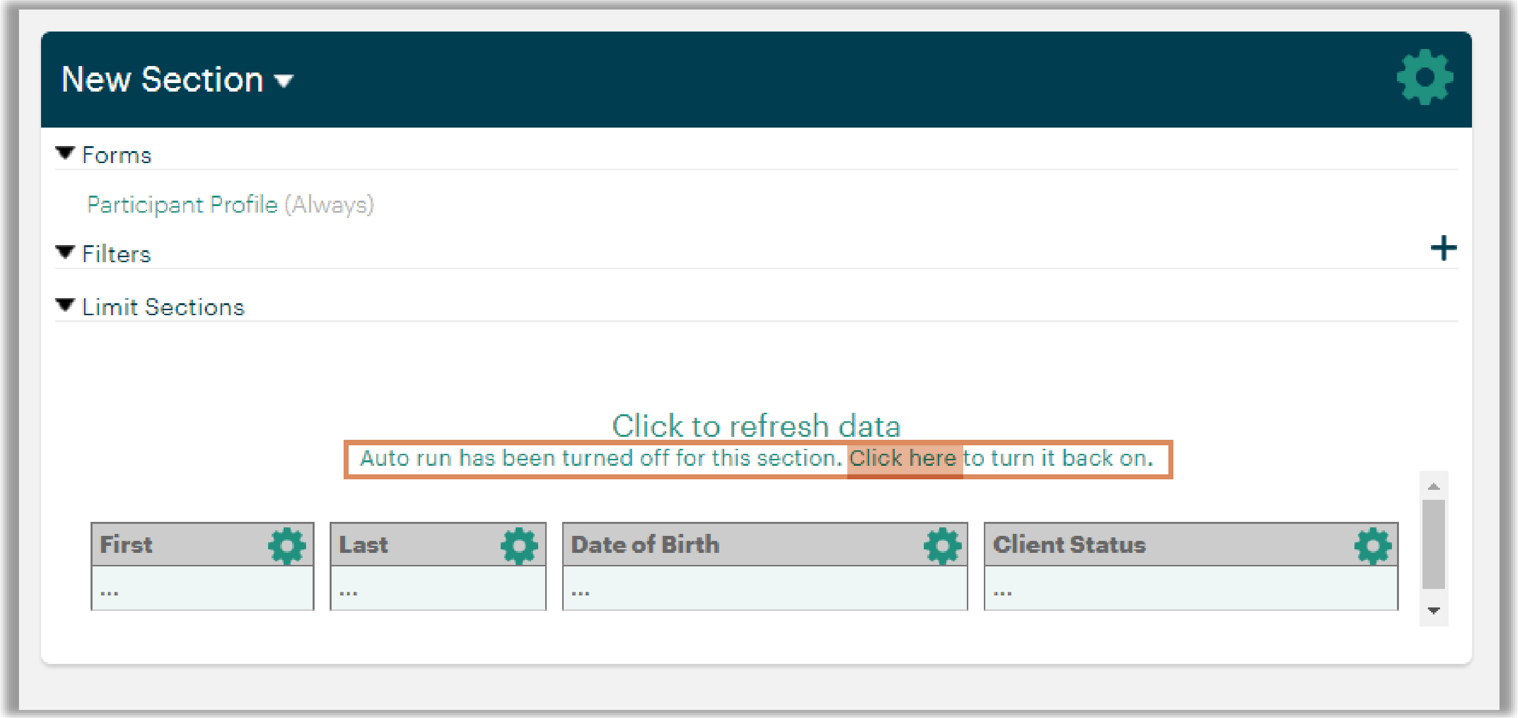
Repeat as needed



Building Reports

Autorun is Off by Default

Turn on to see preview

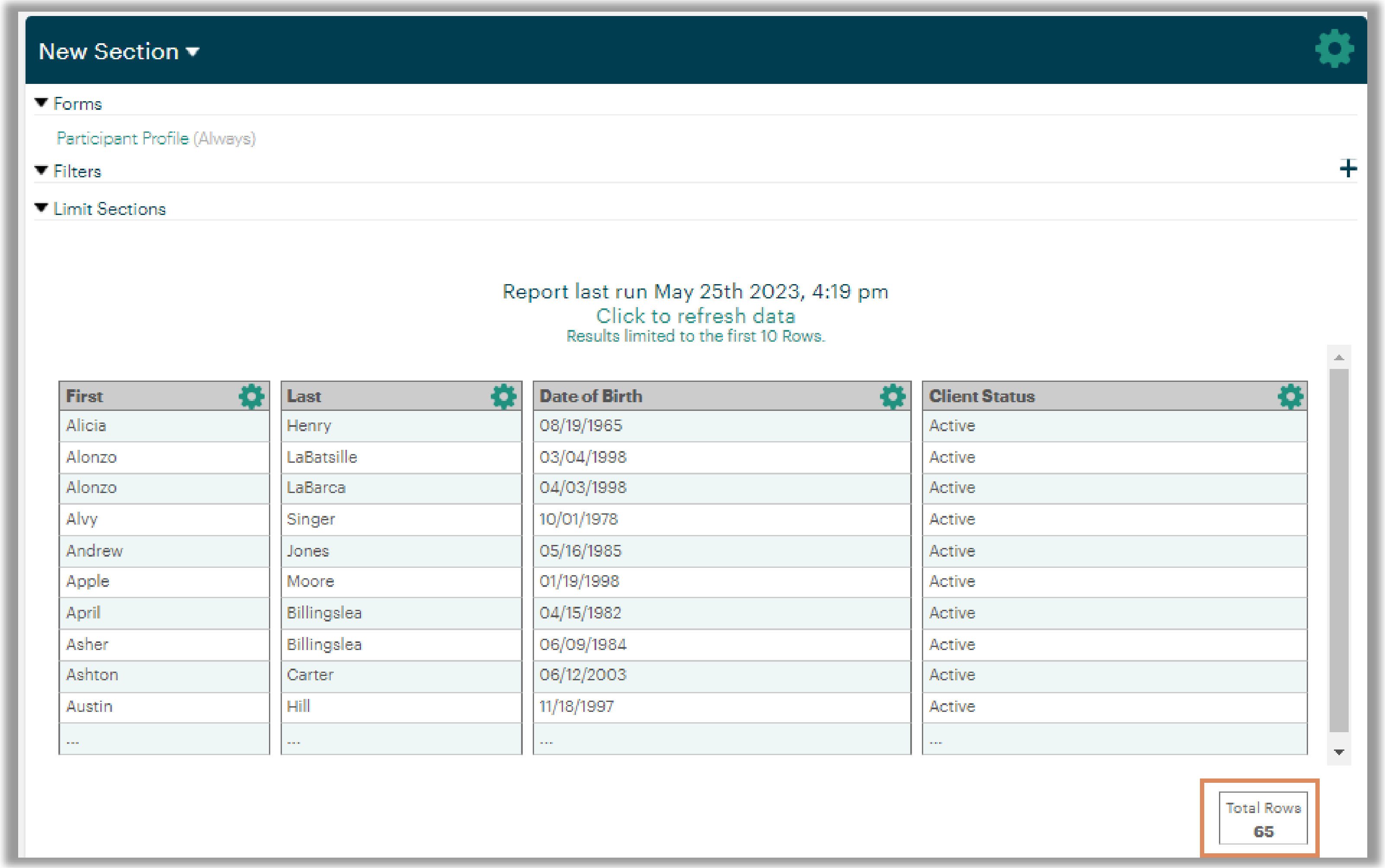


Building Reports

Autorun is Off by Default

Turn on to see preview

Row Count **not** client count



New Section

Forms

Participant Profile (Always)

Filters

Limit Sections

Report last run May 25th 2023, 4:19 pm

Click to refresh data

Results limited to the first 10 Rows.

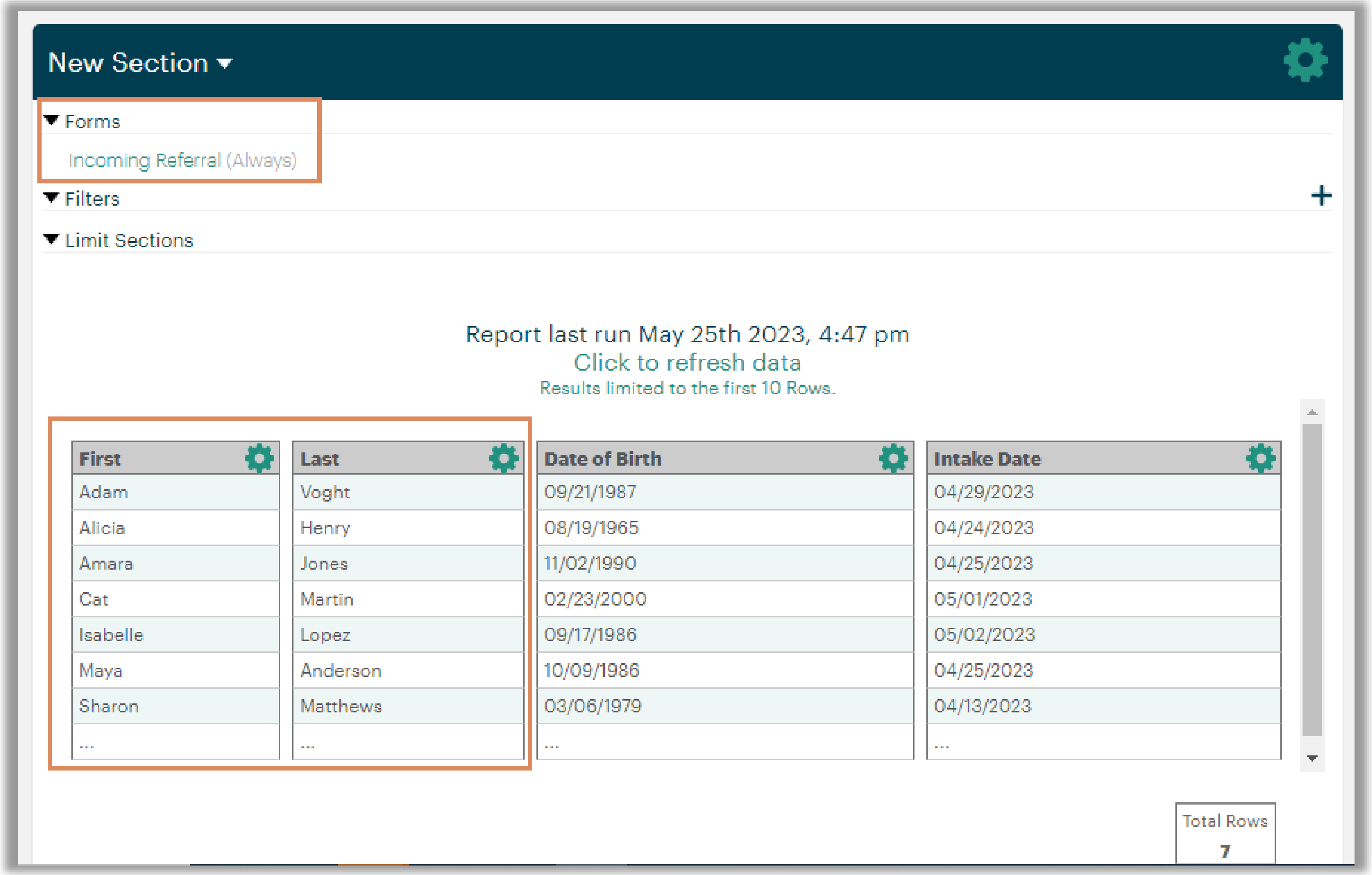
First	Last	Date of Birth	Client Status
Alicia	Henry	08/19/1965	Active
Alonzo	LaBatsille	03/04/1998	Active
Alonzo	LaBarca	04/03/1998	Active
Alvy	Singer	10/01/1978	Active
Andrew	Jones	05/16/1985	Active
Apple	Moore	01/19/1998	Active
April	Billingslea	04/15/1982	Active
Asher	Billingslea	06/09/1984	Active
Ashton	Carter	06/12/2003	Active
Austin	Hill	11/18/1997	Active
...	...	...	...

Total Rows

65

Building Reports

- Will display all data by default
- Preview is limited
- Forms included in report listed under forms
- Can include data from multiple forms in one section.



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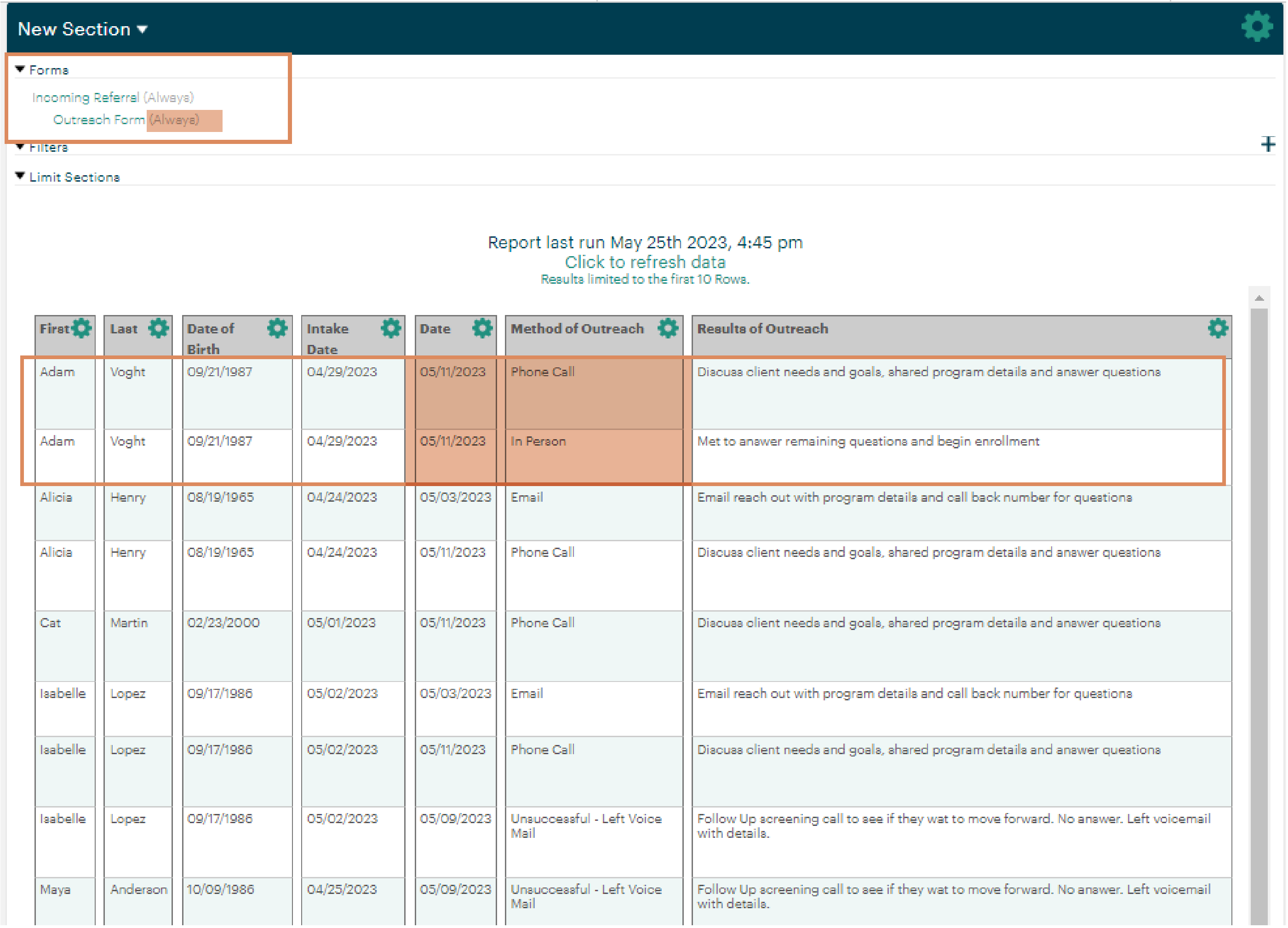
Building Reports

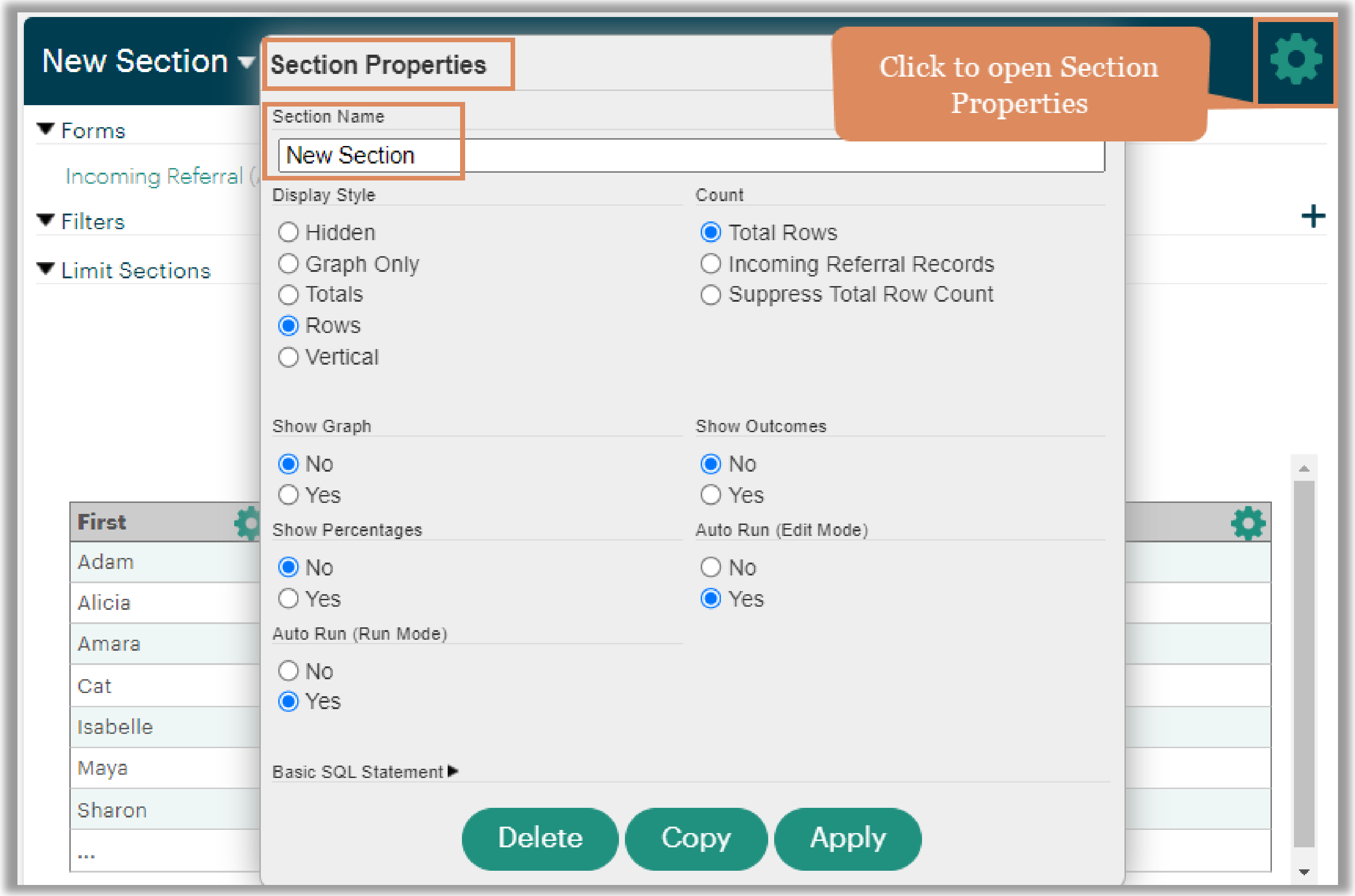
- Data from multiple forms has AND condition by default.
- Only shows subjects with data in both forms
- Data shows **one row per record**
- Section counts rows by default **not** individuals



Formatting Reports

Formatting Reports

- Change Section Properties
- Click Gear icon
- Change Section Name



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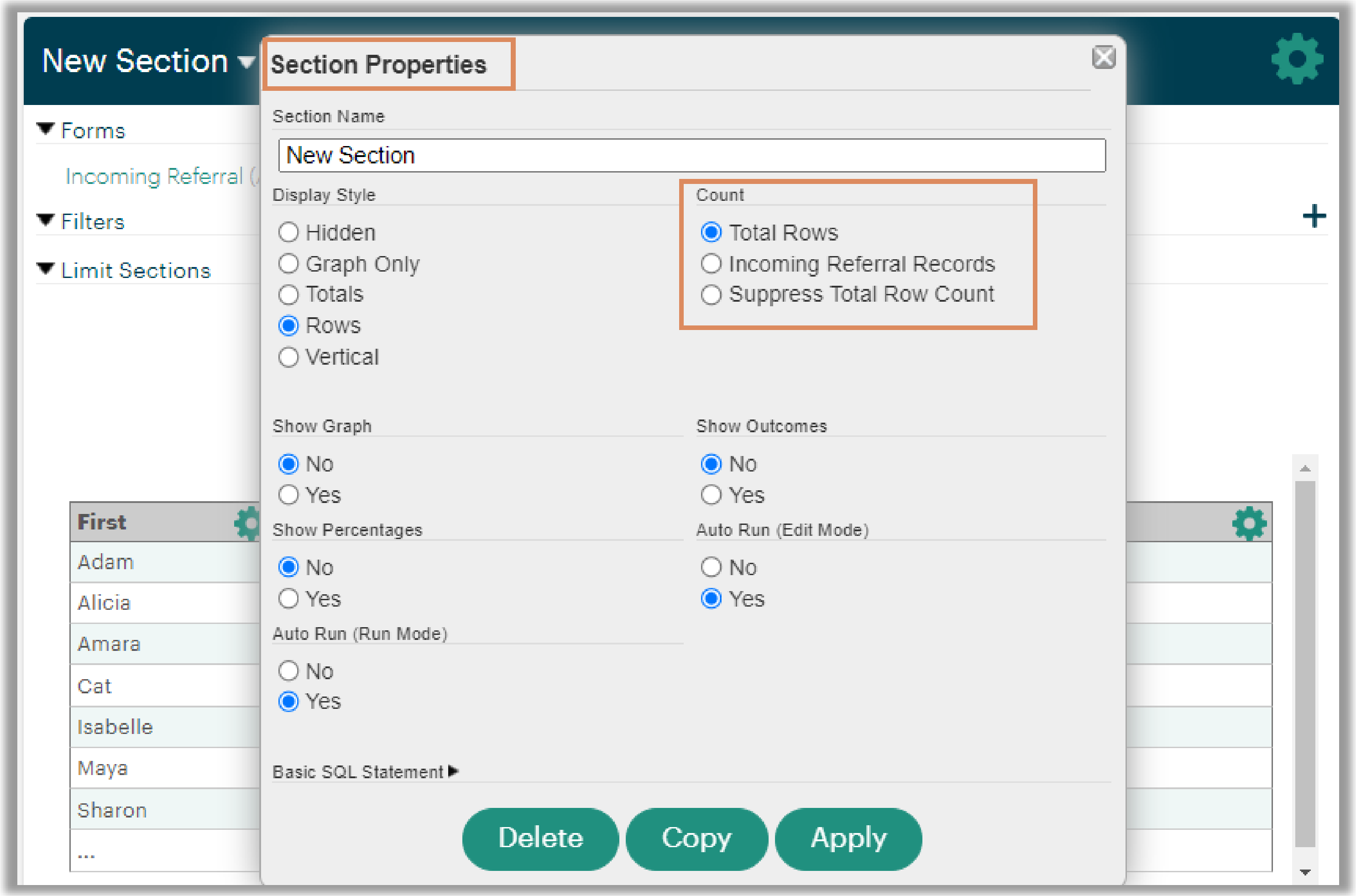
Formatting Reports

- Change Section Count
- Rows (default)
- Number of Records
- Suppress Count



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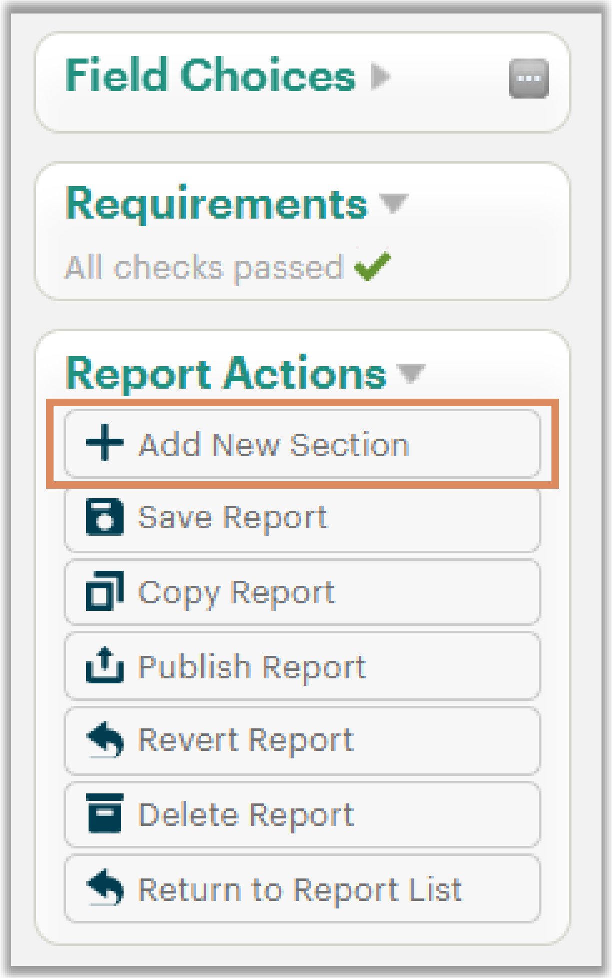
Formatting Reports

- Add New Sections as needed
- Section are autonomous
- Help organize data sets



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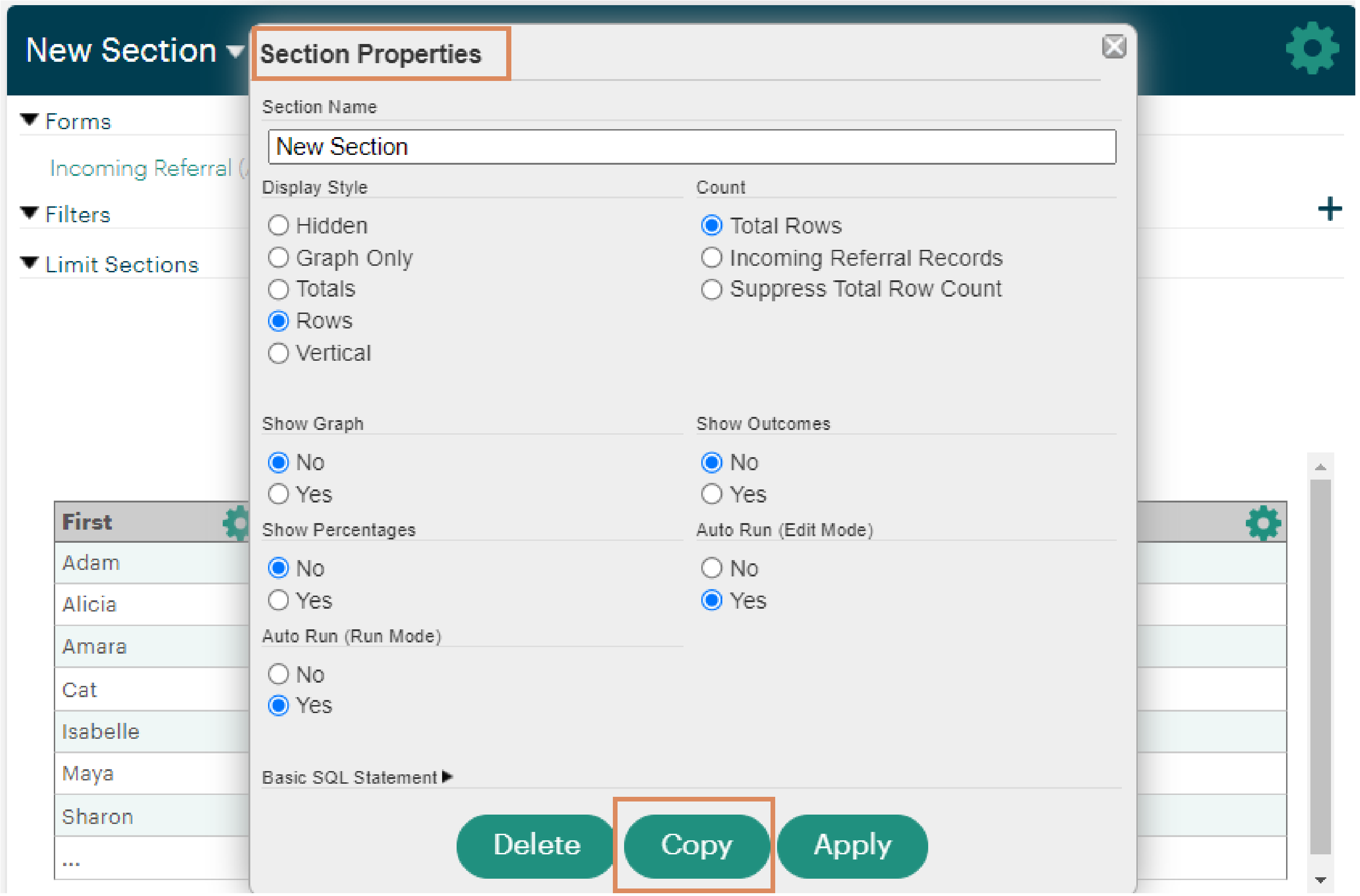
Formatting Reports

- Copy existing section



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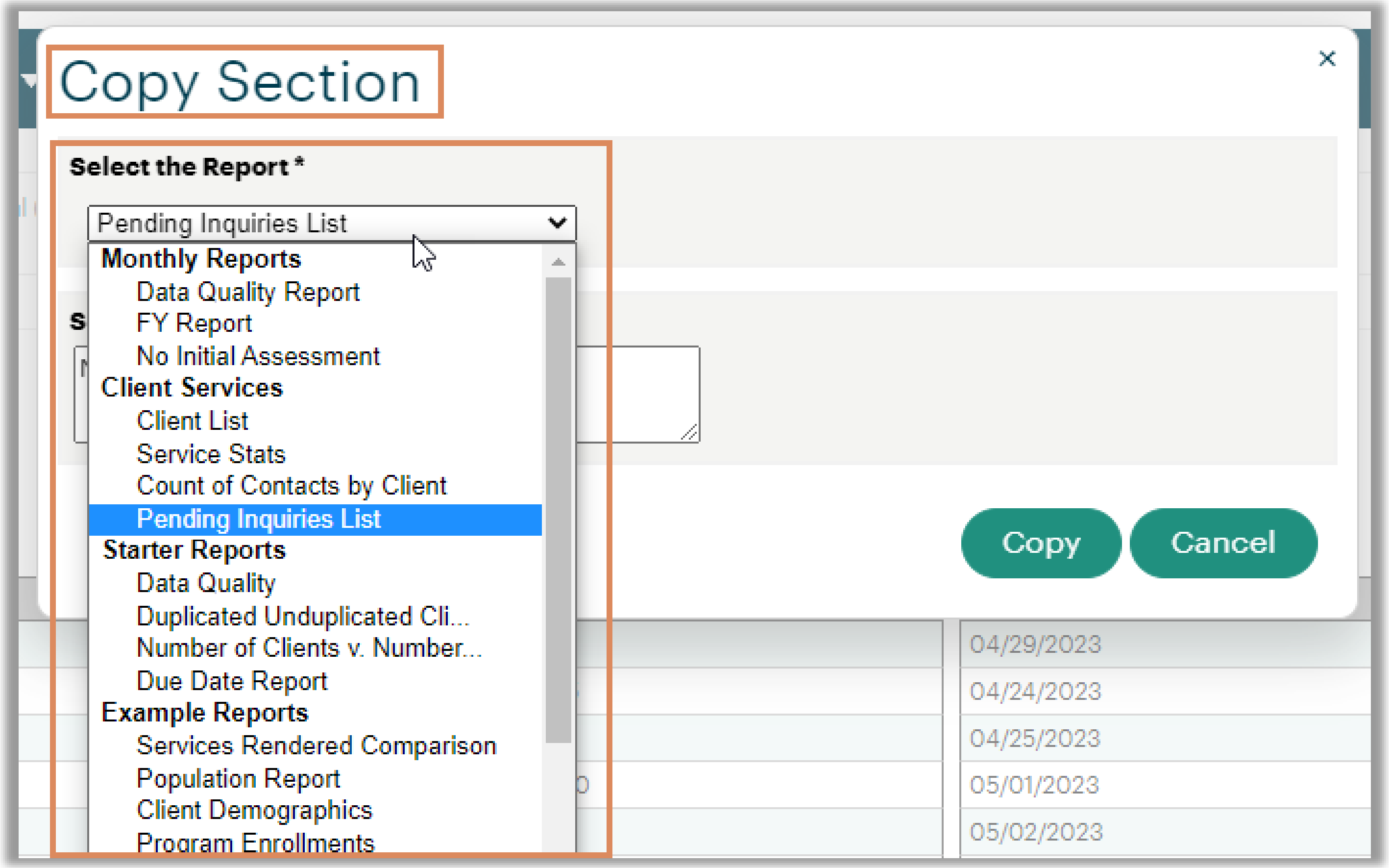
Formatting Reports

- Copy existing section
- To **<u>same or different</u>** report



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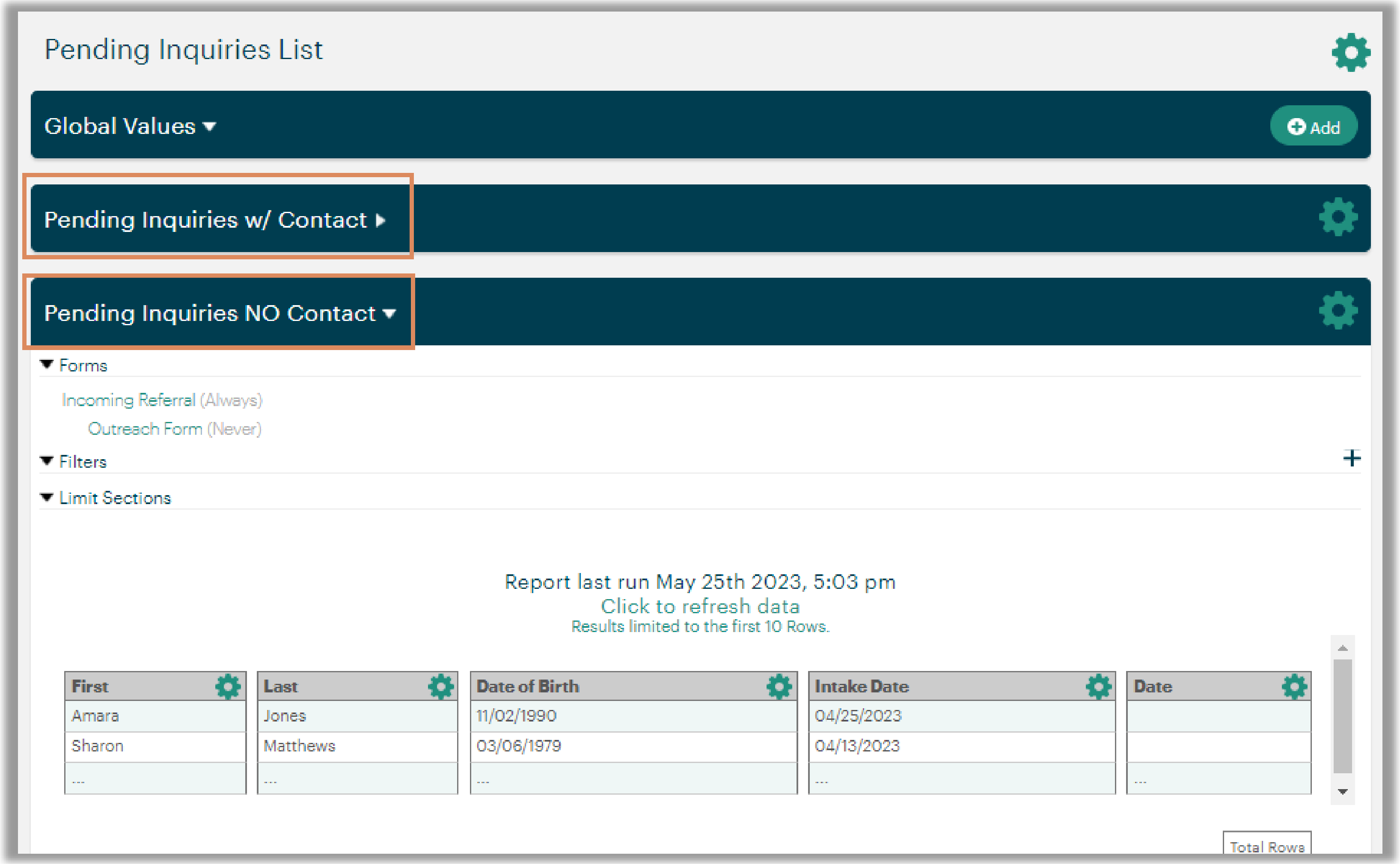
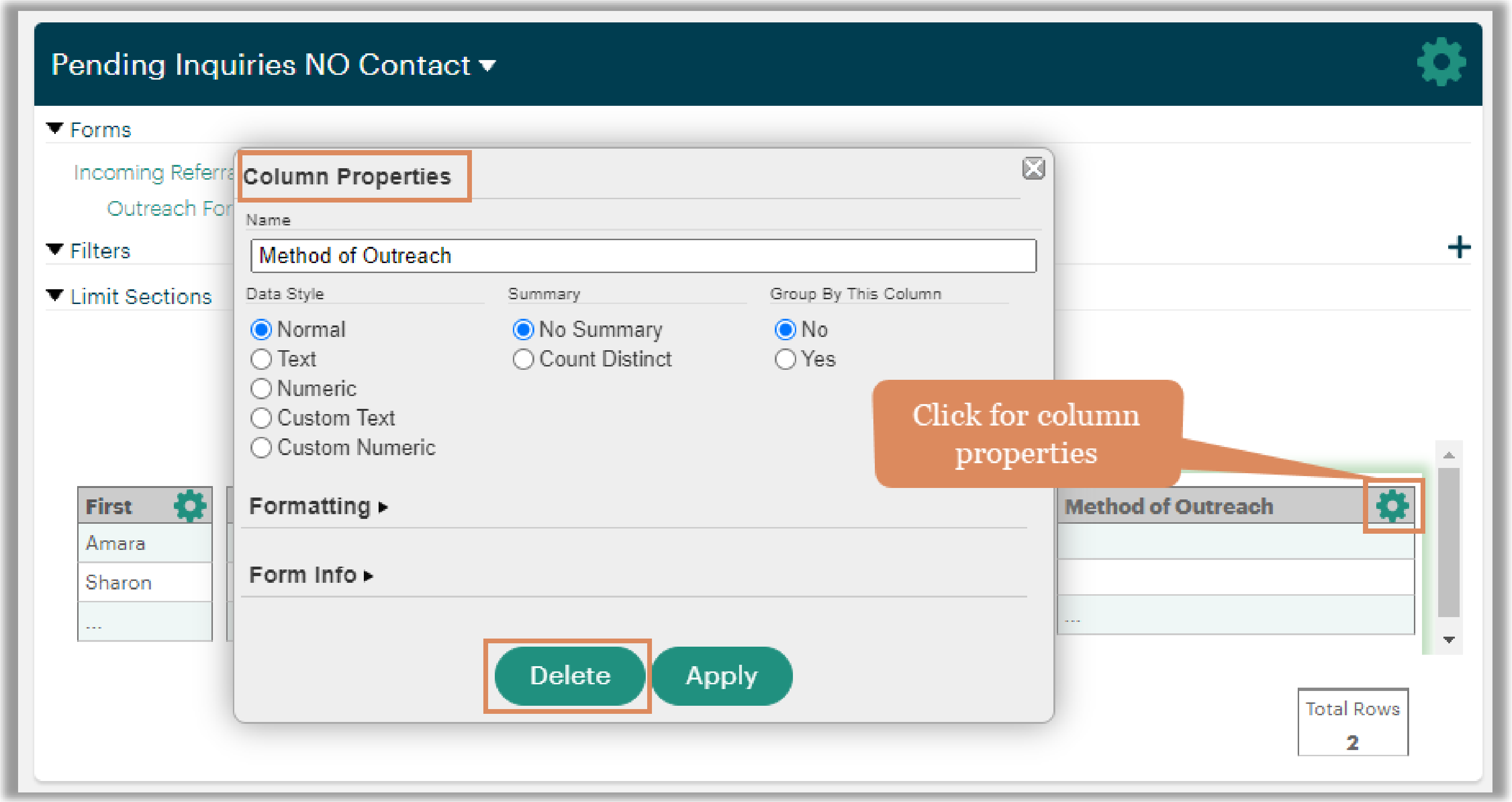
Formatting Reports

- Copy existing section
- To **<u>same or different</u>** report
- Saves Time



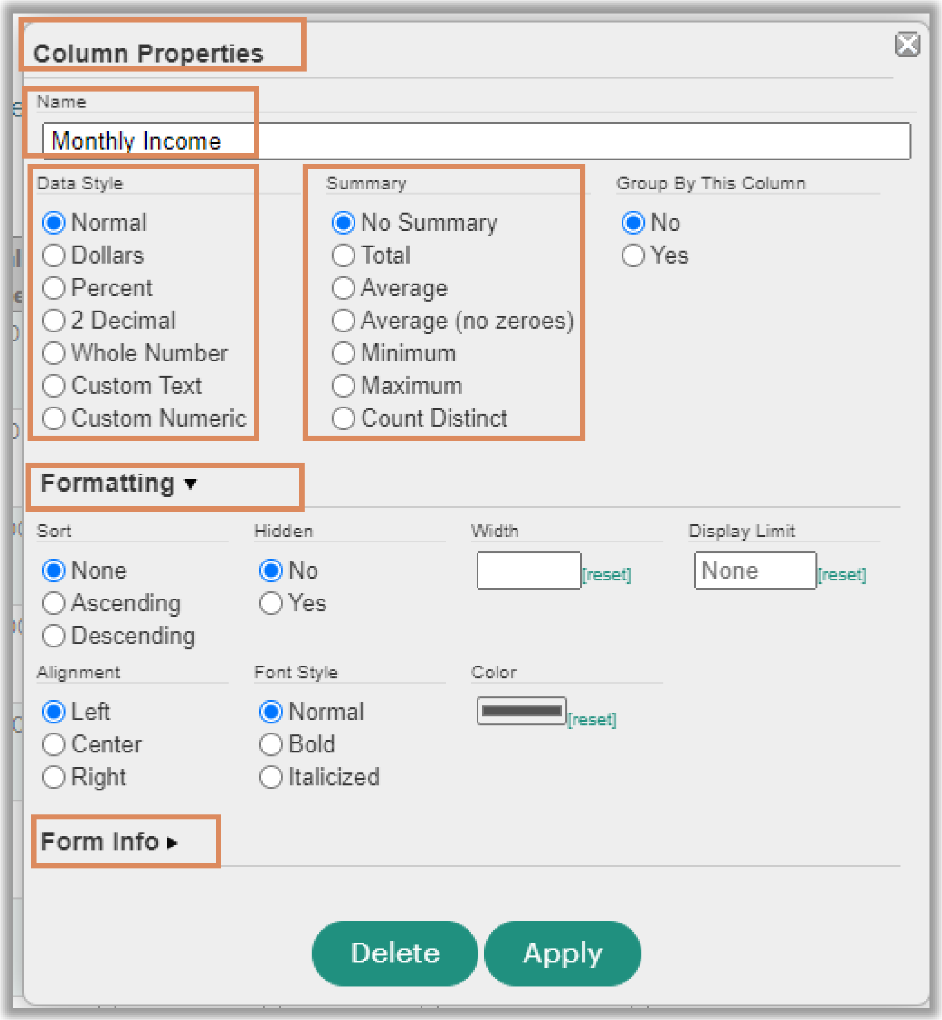
Formatting Reports

- Column Gear shows column properties
- Delete to remove column



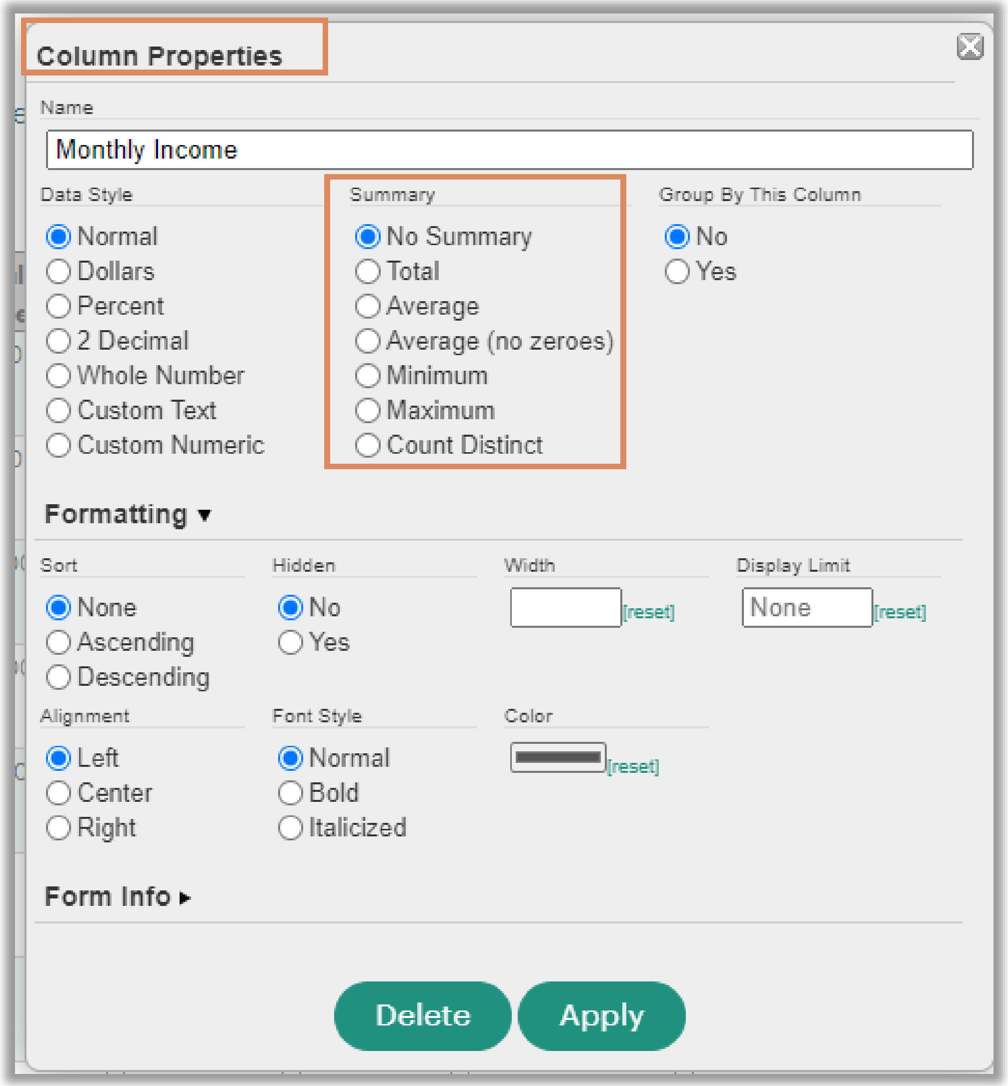
Formatting Reports

- Column Properties
  - Name
  - Data Style
  - Summary
  - Formatting
  - Form Info
- Options vary by data type



Formatting Reports

- Similar to sum feature in excel



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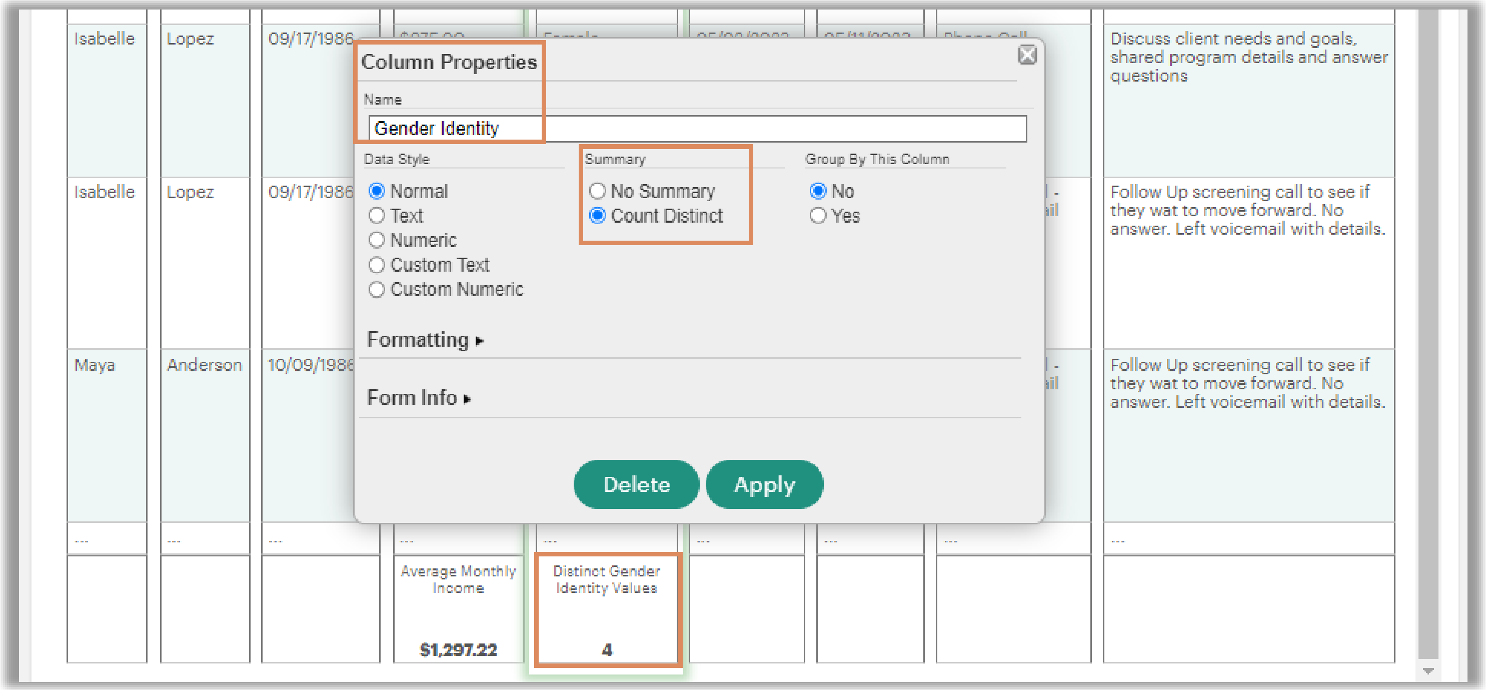
Formatting Reports

- Similar to sum feature in excel
- Summaries display at bottom of the column

First	Last	Date of Birth	Monthly Income	Intake Date	Date	Method of Outreach	Results of Outreach
Adam	Voght	09/21/1987	$1,275.00	04/29/2023	05/11/2023	Phone Call	Discuss client needs and goals, shared program details and answer questions
Adam	Voght	09/21/1987	$1,275.00	04/29/2023	05/11/2023	In Person	Met to answer remaining questions and begin enrollment
Alicia	Henry	08/19/1965	$2,000.00	04/24/2023	05/03/2023	Email	Email reach out with program details and call back number for questions
Alicia	Henry	08/19/1965	$2,000.00	04/24/2023	05/11/2023	Phone Call	Discuss client needs and goals, shared program details and answer questions
Cat	Martin	02/23/2000	$1,200.00	05/01/2023	05/11/2023	Phone Call	Discuss client needs and goals, shared program details and answer questions
Isabelle	Lopez	09/17/1986	$975.00	05/02/2023	05/03/2023	Email	Email reach out with program details and call back number for questions
Isabelle	Lopez	09/17/1986	$975.00	05/02/2023	05/11/2023	Phone Call	Discuss client needs and goals, shared program details and answer questions
Isabelle	Lopez	09/17/1986	$975.00	05/02/2023	05/09/2023	Unsuccessful - Left Voice Mail	Follow Up screening call to see if they wat to move forward. No answer. Left voicemail with details.
Maya	Anderson	10/09/1986	$1,000.00	04/25/2023	05/09/2023	Unsuccessful - Left Voice Mail	Follow Up screening call to see if they wat to move forward. No answer. Left voicemail with details.
...	...	...	...	...	...	...	...
			Average Monthly Income **$1,297.22**				

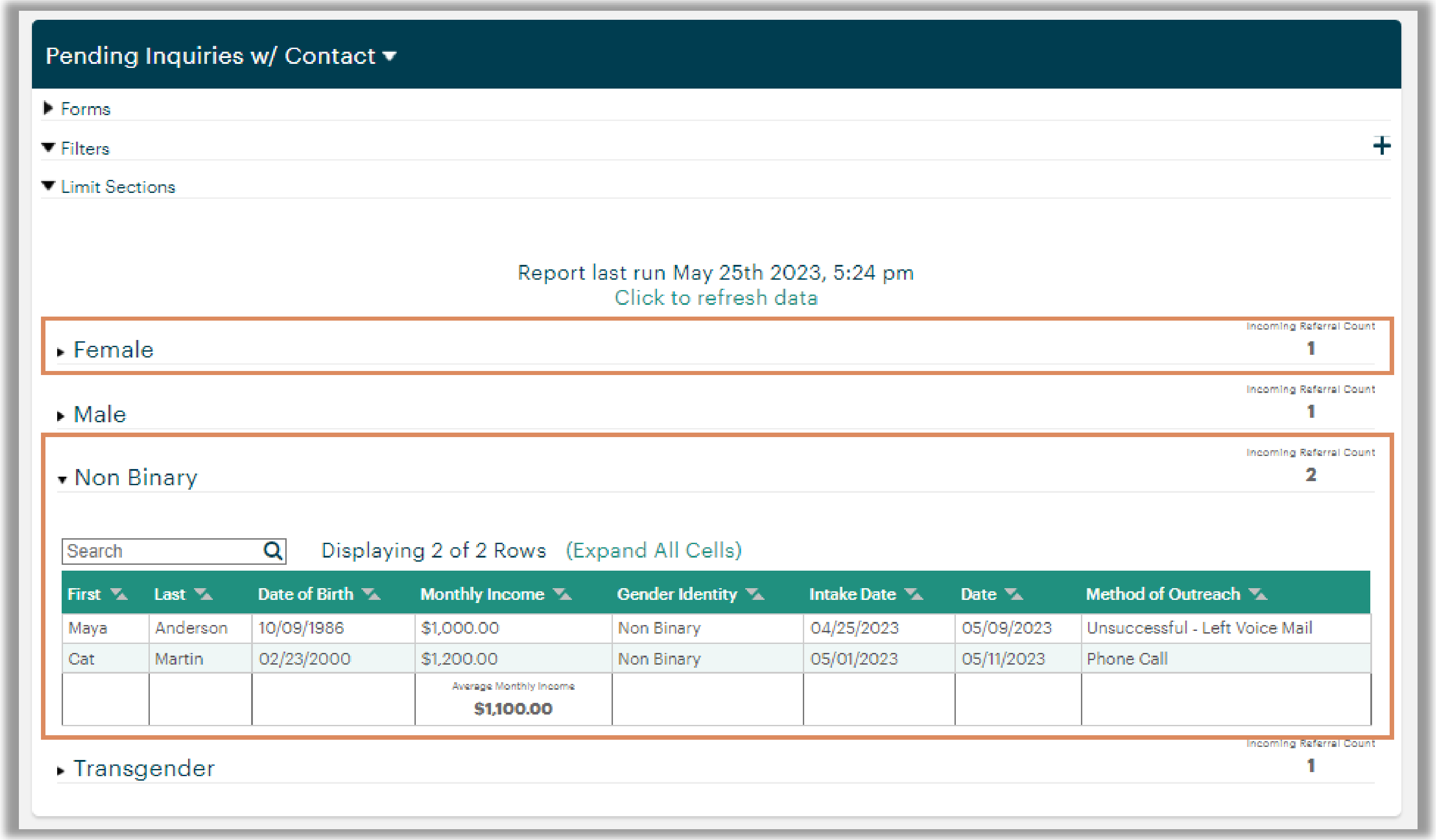
Formatting Reports

- Summary for text data shows number of options



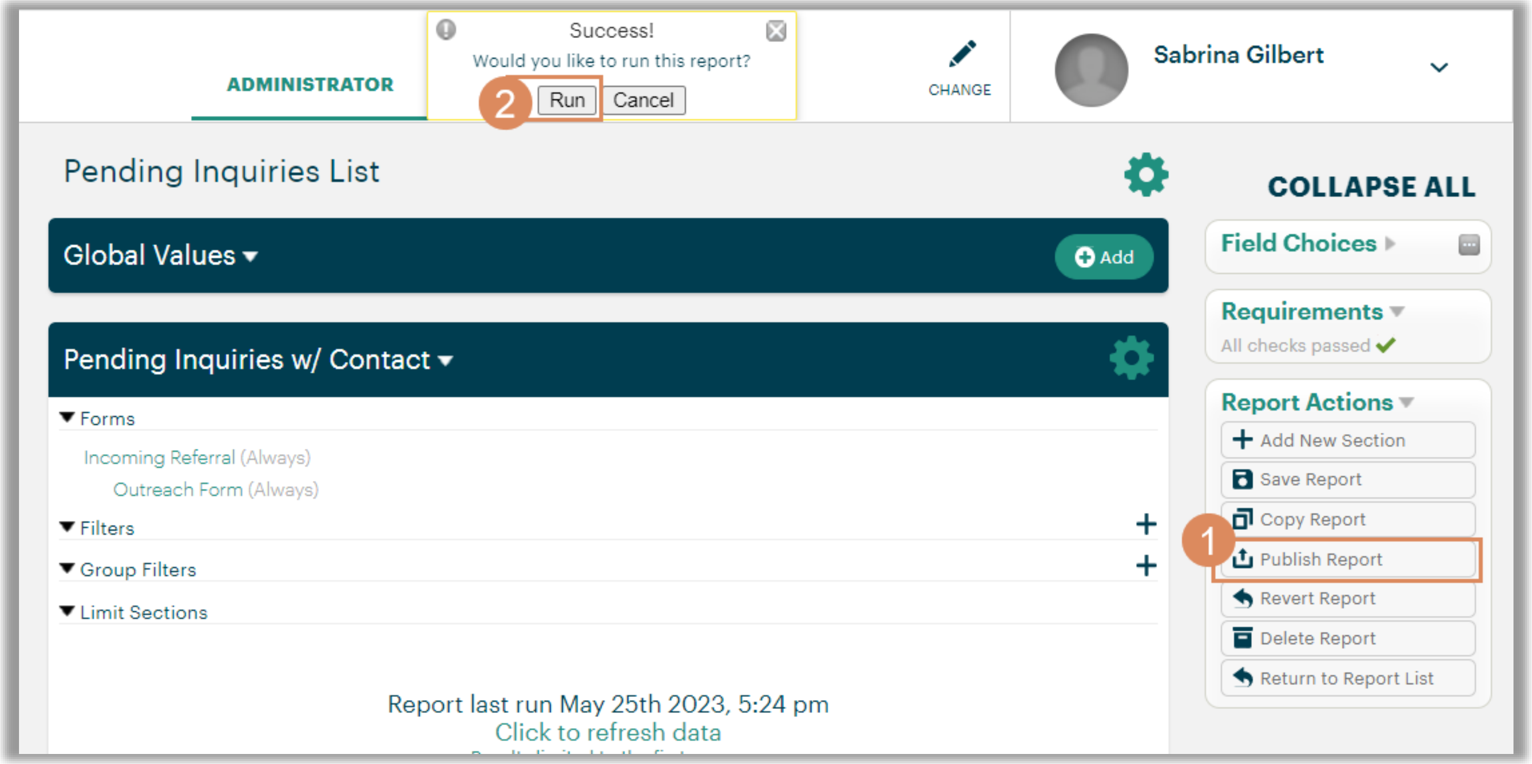
Formatting Reports

- Summary for text data shows number of options
- Use Group property to count by text data.



Publish and test

- Must publish to see full data set
- Run to ensure desired layout



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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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