

# Apricot Troubleshooting Your Report

# Meet Your Trainer

First Name Last Name

Training & Development Associate

# Learning Objective

Review 3 common mistakes users make when working with the Report Builder in Apricot so that Administrators can confidently trouble shoot and or avoid these issues when working with reports.

# Agenda

Red Error Message

Root & Connecting  
Form Relationship

Filter Logic

# Red Error Message

# Red Error Message

## Common Causes:

- Field Removed from a Form
- Broken Filter
- Broken Filter Logic

**Client List**

The field 'Ethnicity' referred to by the column 'Ethnicity' is no longer active. The section has been automatically repaired and should be republished.

Forms

Filters

Limit Sections

Report last run June 9th 2022, 1:18 pm  
Click to refresh data  
Results limited to the first group.

The field 'Ethnicity' referred to by the column 'Ethnicity' is no longer active. The section has been automatically repaired and should be republished.

First	Last	Date of Birth	Intake Date
Jen	Fulton	07/18/1990	10/12/201
Kris	Oppenheimer	05/02/1987	10/13/201

**Participant List**

Participant Profile (Always)

Filters

Record ID Matches Any Of 38

Client Status Matches Any Of Active or Inactive or Waiting List

Filter Logic

1 and 2

Group Filters

Limit Sections

Report last run November 9th 2022, 1:18 pm  
Click to refresh data  
Results limited to the first group.

SQLSTATE[42000]: Syntax error or access violation: 1064 You have an error in your SQL syntax; check the manual that corresponds to your MySQL server version for the right syntax to use near '(\*12), 2)) as column\_443 FROM documents as' at line 2, query was: SELECT IF (cast(data\_2.field\_8 AS CHAR) = '', '-none-', IF (data\_2.field\_8 IS NULL, 'No Value', data\_2.field\_8)) AS group\_column\_434, IF (cast(data\_2.field\_444 AS CHAR) = '', '-none-', IF (data\_2.field\_444 IS NULL, 'No Value', data\_2.field\_444)) AS group\_column\_433, data\_2.field\_2\_last as column\_431, data\_2.field\_2\_first as column\_430, data\_2.field\_96 as column\_432, data\_2.field\_8 as column\_434, data\_2.field\_444 as column\_433, IF(data\_2.field\_95 = '0000-00-00', '', DATE\_FORMAT(NOW(), '%Y') - DATE\_FORMAT(data\_2.field\_95, '%Y') - (DAYOFYEAR(NOW()) < DAYOFYEAR(data\_2.field\_95))) as column\_435, CONCAT('\$', FORMAT((\*12), 2)) as column\_443 FROM documents as doc\_2 INNER JOIN data\_2 as data\_2 ON data\_2.document\_id = doc\_2.id AND (data\_2.active = 1 OR data\_2.active IS NULL) WHERE ((cast(data\_2.document\_id as signed) = '38') AND (data\_2.field\_96 = 'Active' OR data\_2.field\_96 = 'Inactive' OR data\_2.field\_96 = 'Waiting List')) AND (concat(IF (cast(data\_2.field\_8 AS CHAR) = '', '-none-', IF (data\_2.field\_8 IS NULL, 'No Value', data\_2.field\_8))) = 'Male' AND concat(IF (cast(data\_2.field\_444 AS CHAR) = '', '-none-', IF (data\_2.field\_444 IS NULL, 'No Value', data\_2.field\_444))) = 'Non-Hispanic') ORDER BY data\_2.field\_8, data\_2.field\_444, doc\_2.id LIMIT 10

The sql statement was:

```
SELECT IF (cast(data_2.field_8 AS CHAR) = '', '-none-', IF (data_2.field_8 IS NULL, 'No Value', data_2.field_8)) AS group_column_434, IF (cast(data_2.field_444 AS CHAR) = '', '-none-', IF (data_2.field_444 IS NULL, 'No Value', data_2.field_444)) AS group_column_433, data_2.field_2_last as column_431, data_2.field_2_first as column_430, data_2.field_96 as column_432, data_2.field_8 as column_434, data_2.field_444 as column_433, IF(data_2.field_95 = '0000-00-00', '', DATE_FORMAT(NOW(), '%Y') - DATE_FORMAT(data_2.field_95, '%Y') - (DAYOFYEAR(NOW()) < DAYOFYEAR(data_2.field_95))) as column_435, CONCAT('$', FORMAT((*12), 2)) as column_443 FROM documents as doc_2 INNER JOIN data_2 as data_2 ON data_2.document_id = doc_2.id AND (data_2.active = 1 OR data_2.active IS NULL) WHERE ((cast(data_2.document_id as signed) = '38') AND (data_2.field_96 = 'Active' OR data_2.field_96 = 'Inactive' OR data_2.field_96 = 'Waiting List')) AND (concat(IF (cast(data_2.field_8 AS CHAR) = '', '-none-', IF (data_2.field_8 IS NULL, 'No Value', data_2.field_8))) = 'Male' AND concat(IF (cast(data_2.field_444 AS CHAR) = '', '-none-', IF (data_2.field_444 IS NULL, 'No Value', data_2.field_444))) = 'Non-Hispanic') ORDER BY data_2.field_8, data_2.field_444, doc_2.id LIMIT 10
```

# Troubleshooting Deactivated Field

## Option 1:

- Republish the Report
  - Resolves Message
  - Sometimes requires rebuilding\*

The screenshot displays a 'Client List' report interface. At the top, a dark teal header contains the title 'Client List' and a gear icon. Below the header, a red error message is displayed: 'The field 'Ethnicity' referred to by the column 'Ethnicity' is no longer active. The section has been automatically repaired and should be republished.' This message is underlined. The main content area shows a report summary: 'Report last run June 23rd 2023, 3:46 pm', 'Click to refresh data', and 'Results limited to the first 10 Rows.' Below this, another identical red error message is shown. At the bottom, a table header is visible with columns: 'First', 'Last', 'Date of Birth', 'Intake Date', 'Enrollment Date', '# Days b/n Intake & Enrollment', and 'Client Status'. Each column header has a gear icon. On the right side, a sidebar contains 'Requirements' (All checks passed) and 'Report Actions' (Add New Section, Save Report, Copy Report, Publish Report, Revert Report, Delete Report, Return to Report List). The 'Publish Report' button is highlighted with an orange border. A green circular button with a white arrow pointing up is located at the bottom right of the sidebar.

# Troubleshooting Deactivated Field

## Option 2:

1. Reactivate the field

Participant Profile

Profile Details ▾

**Participant Name**  First  Middle  Last

**Intake Date**  06/23/2023

**Date of Birth**  MM/DD/YYYY

**Client Status**

Active  
 Inactive  
 Other

**How did you hear about us?**

Internet  
 Newspaper  
 Radio  
 Other

**Client Phone Number**    ext.

**Client Email**  customer\_care@apricot.inf

**Inactive Fields** (drag and click save to activate)

**Parenting Pre Test**

**COLLAPSE ALL**

**Field Choices** ▾

**Requirements** ▾  
All checks passed

**Form Actions** ▾

Show/Hide Inactive Fields



# Troubleshooting Deactivated Field

## Option 2:

1. Reactivate the field
2. Remove the column from the report

The screenshot shows a 'Client List' interface with a 'Column Properties' dialog box open. The dialog box is titled 'Column Properties' and has a close button (X) in the top right corner. It contains the following fields and options:

- Name: Ethnicity
- Data Style:  Normal,  Text,  Numeric,  Custom Text,  Custom Numeric
- Summary:  No Summary,  Count Distinct
- Formatting: (collapsed)
- Form Info: (collapsed)
- Buttons: Delete (highlighted with an orange box and a '2' in a circle), Apply

An orange callout box with the text 'Click to open Field Properties' points to a gear icon on the 'Ethnicity' column header in the background table. The background table has columns for 'Ethnicity' and 'Client Status'. The 'Ethnicity' column is currently deactivated, indicated by a grey background and a gear icon. The 'Client Status' column is active, indicated by a green background and a gear icon.

Firs	Ethnicity	Client Status
Jen	Hispanic	Active
Kris	Non-Hispanic	Active
Illiar	Non-Hispanic	Active
Jess	Non-Hispanic	Active
Kend	Non-Hispanic	Active
Luis	Hispanic	Active

# Troubleshooting Deactivated Field

## Option 2:

1. Reactivate the field
2. Remove the column from the report
3. Publish changes to the report

Client List

Forms

- Participant Profile (Always)
- Program Enrollment and Exit (Always)

Filters

Limit Sections

Report last run June 23rd 2023, 4:15 pm  
Click to refresh data  
Results limited to the first 10 Rows.

First	Last	Date of Birth	Intake Date	Enrollment Date	# Days b/n Intake & Enrollment	Client Status	Gei
Jen	Fulton	07/18/1990	10/12/2016	01/23/2017	103	Active	Fen
Kris	Oppenheimer	05/02/1987	10/13/2016	01/24/2017	103	Active	Fen
Illiana	Pallmissiano	03/16/1985	10/15/2016	01/26/2017	103	Active	Fen

Field Choices

Requirements

All checks passed

Report Actions

- Add New Section
- Save Report
- Copy Report
- Publish Report**
- Revert Report
- Delete Report
- Return to Report List

# Troubleshooting Deactivated Field

## Option 2:

1. Reactivate the field
2. Remove the column from the report
3. Publish changes to the report
4. Deactivate the field again

The screenshot shows the 'Participant Profile' configuration interface. A 'Field Properties (dropdown)' dialog box is open for the 'Ethnicity' field. The dialog box contains the following sections:

- Display Name:** Ethnicity
- Standard Properties:**
  - Required
  - Duplicate Check
  - Locked
  - Quick View
  - Searchable
  - Hidden
  - Restricted
  - Clear On Copy
- Field Choices:**
  - Hispanic
  - Non-Hispanic
- Buttons:** Bulk Entry, Allow Other
- Special Properties:**
  - Default Value
  - Tooltip

The 'Deactivate' button is highlighted with a red box, and a circled '4' is next to it, indicating the step in the troubleshooting process. The 'Apply' button is also visible. The background shows the 'Demographic Info' section with fields for Ethnicity, Marital Status, Employed, Monthly Income, and Employer.

# Red Error Message

## Troubleshooting Broken Filter

1. Remove the filter
2. Add filter again

The screenshot shows a software interface with a sidebar on the left and a main content area. The sidebar has a 'Participant List' header and a 'Filters' section. In the 'Filters' section, a filter named 'Record ID Matches Any Of 38' is highlighted with a red box and a circled '1'. The main content area displays a red error message: 'SQLSTATE[42000]: Syntax error or access denied error: The table or view '...' does not exist in the database. The error message is partially obscured by a 'Filter Properties' dialog box. The dialog box has a 'Rule' section with 'Record ID' selected and 'Matches Any Of' chosen. Below this, there is a list of 'Lookup Values to Match' with checkboxes next to each value: 33 (1), 34 (1), 35 (1), 36 (1), 37 (1), 38 (1) (checked), 239 (1), 408 (1), 409 (1), and 410 (1). There is also a section for 'Other Values to Match' with a text input field. At the bottom of the dialog box, there are 'Options' including 'Inverse', 'Locked' (checked), 'Hidden', 'Global', and 'Comparison'. A red box with a circled '2' highlights the 'Delete' button, and an 'Apply' button is also visible.

# Red Error Message

## Troubleshooting Broken Filter Logic

1. Remove the last filter you added
2. Recreate the filter

The screenshot shows a 'Participant List' interface with a 'Filter Properties' dialog box open. The dialog box displays the following information:

- Rule: Client Status
- Matches Any Of
- Lookup Values to Match: Active (64), Inactive (2), Waiting List (2)
- Other Values to Match: Enter | separated values (or click lookup icon)
- Options: Inverse, Locked, Hidden, Global, Comparison

A red error message is visible at the bottom of the screen, starting with 'SQLSTATE[420... corresponds to your query was: SELE...'. The error message is partially obscured by the dialog box. A red box highlights the 'Delete' button in the dialog box, and a red circle with the number '1' highlights the filter rule 'Client Status Matches Any Of Active or Inactive' in the background interface.

# Root & Connecting Form Relationships

# Root & Connecting Form Relationships

## Common Challenges

- Duplicate Records

Services Related to Specific Program

▼ Forms

- Client Profile (Always)
- Enrollment (Always)
- Services (Always)

▼ Filters

▼ Limit Sections

Report last run November 3rd 2021, 8:45 am  
Click to refresh data  
Results limited to the first 10 Rows.

First	Last	Start Date	End Date	Program	Record ID
Sam	Doe	04/01/2017	04/14/2017	Legal	1437
Sam	Doe	04/01/2017	04/14/2017	Employment	1437
Sam	Doe	05/14/2020		Legal	1437
Sam	Doe	04/01/2017	04/14/2017	Legal	1438
Sam	Doe	04/01/2017	04/14/2017	Employment	1438
Sam	Doe	05/14/2020		Legal	1438
Sam	Doe	04/01/2017	04/14/2017	Legal	1439
Sam	Doe	04/01/2017	04/14/2017	Employment	1439
Sam	Doe	05/14/2020		Legal	1439
...	...	...	...	...	...

# Root & Connecting Form Relationships

## Common Challenges

- Duplicate Records

## Common Causes

- Not referencing Linking Field
- Inaccurate form order

Services Related to Specific Program

▼ Forms

- Client Profile (Always)
- Enrollment (Always)
- Services (Always)

▼ Filters

▼ Limit Sections

Report last run November 3rd 2021, 8:45 am  
Click to refresh data  
Results limited to the first 10 Rows.

First	Last	Start Date	End Date	Program	Record ID
Sam	Doe	04/01/2017	04/14/2017	Legal	1437
Sam	Doe	04/01/2017	04/14/2017	Employment	1437
Sam	Doe	05/14/2020		Legal	1437
Sam	Doe	04/01/2017	04/14/2017	Legal	1438
Sam	Doe	04/01/2017	04/14/2017	Employment	1438
Sam	Doe	05/14/2020		Legal	1438
Sam	Doe	04/01/2017	04/14/2017	Legal	1439
Sam	Doe	04/01/2017	04/14/2017	Employment	1439
Sam	Doe	05/14/2020		Legal	1439
...	...	...	...	...	...



# Root & Connecting Form Relationships

## Troubleshooting:

- Rebuild the section

Services by Program ▾

▼ Forms

- Participant Profile (Always)
- Services (Always)
- Program Enrollment and Exit (Always)

▼ Filters +

▼ Limit Sections

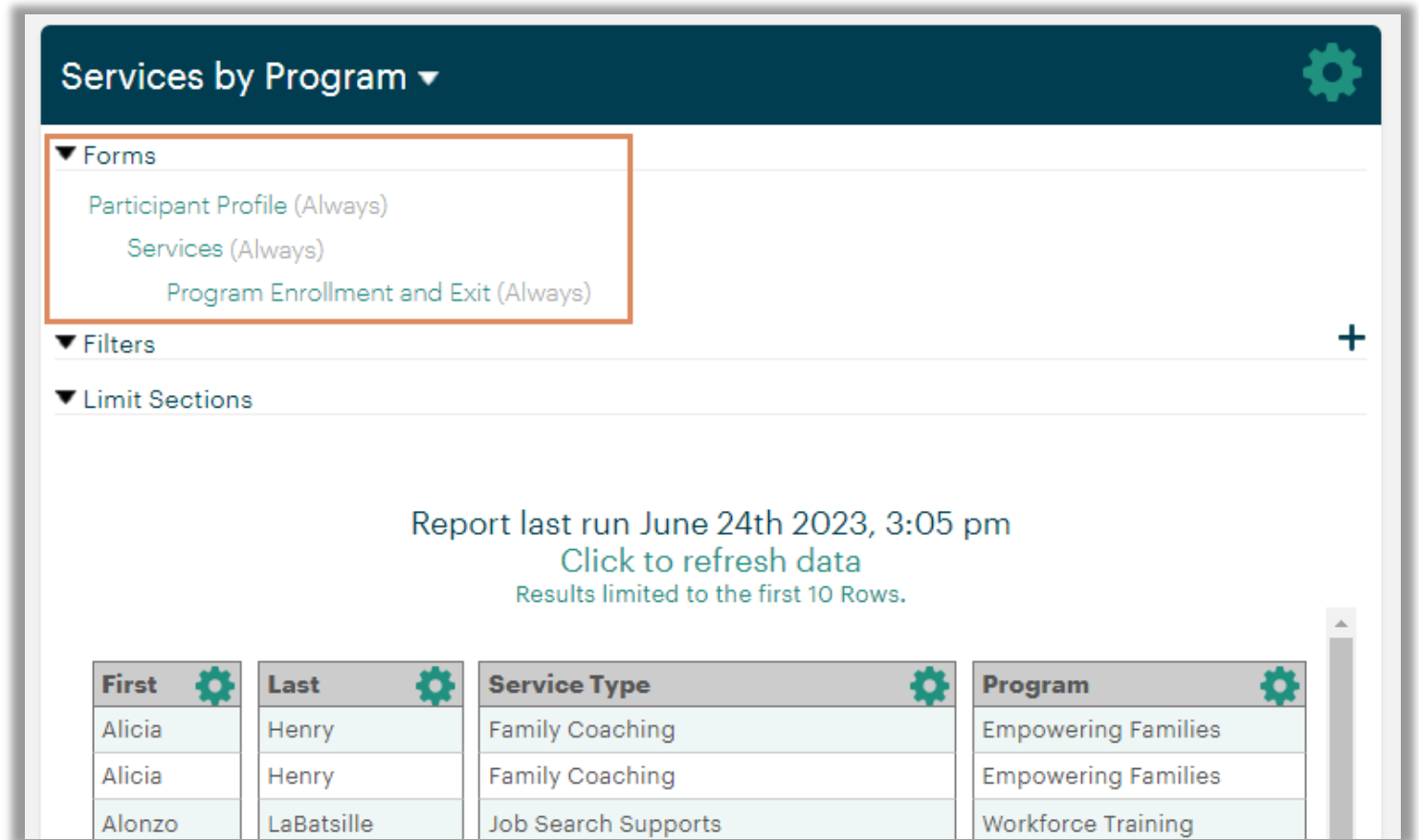
Report last run June 24th 2023, 3:05 pm  
Click to refresh data  
Results limited to the first 10 Rows.

First	Last	Service Type	Program
Alicia	Henry	Family Coaching	Empowering Families
Alicia	Henry	Family Coaching	Empowering Families
Alonzo	LaBatsille	Job Search Supports	Workforce Training

# Root & Connecting Form Relationships

## Troubleshooting:

- Rebuild the section
- Choose Root Form Wisely
- Consider what forms are related to one another before adding fields



Services by Program ▾

▼ Forms

- Participant Profile (Always)
- Services (Always)
- Program Enrollment and Exit (Always)

▼ Filters +

▼ Limit Sections

Report last run June 24th 2023, 3:05 pm  
[Click to refresh data](#)  
Results limited to the first 10 Rows.

First	Last	Service Type	Program
Alicia	Henry	Family Coaching	Empowering Families
Alicia	Henry	Family Coaching	Empowering Families
Alonzo	LaBatsille	Job Search Supports	Workforce Training

# Root & Connecting Form Relationships

## Troubleshooting:

- Rebuild the section
- Choose Root Form Wisely
- Consider what forms are related to one another before adding fields
- Adjust Form properties to ensure report shows data based on linked relationship

The screenshot displays a software interface for managing forms. The main window is titled "Client Services by Program" and shows a list of forms under the "Forms" section. The "Services (Always)" form is highlighted with a red box and a circled "1". Below the forms list, there are sections for "Filters" and "Limit Sections".

A modal window titled "Services Form Properties [highlight]" is open, showing configuration options for the selected form. The "Connected To" section has "Program Enrollment and Exit" selected with a red box and a circled "2". The "Using Field" section has "Associated Services (linking)" selected with a red box and a circled "3". The "Required" section has "Always" selected. The "Limit" section has "None" selected. There are checkboxes for "Enforce Programs filter (where applicable)" and "Enforce User Level Access filter (where applicable)". At the bottom of the modal, there are "Delete" and "Apply" buttons, with the "Apply" button highlighted by a red box and a circled "4".

On the right side of the interface, there are panels for "Field Choices", "Requirements", and "Report Actions". The "Field Choices" panel shows a tree view of fields, including "Special Columns", "Sites and Programs", "Enrollments", "Participant Profile", "Goals", "Individual Service Plan (ISP)", and "Services". The "Requirements" panel shows "All checks passed" with a green checkmark. The "Report Actions" panel shows options like "Add New Section", "Save Report", "Copy Report", "Publish Report", "Revert Report", and "Delete Report".

# Filter Logic

# Filter Logic

## Common Challenge

- Data not returning as expected

## Common Cause

- Logic missing parentheses

The screenshot shows a web interface for "Services by Date and Program". It includes a filter section with the following settings:

- Service Date is Between 05/31/2023 and 06/25/2023
- Program Matches Any Of Empowering Families
- County Matches Any Of Hudson County
- Filter Logic: 1 and 2 or 3

Below the filters, it states "Report last run June 25th 2023, 4:01 pm" and "Click to refresh data". A search bar is present above a table with 10 rows. The table columns are: First, Last, Program, Service Date, Service Type, Service Time in Hours, and County. The table data is as follows:

First	Last	Program	Service Date	Service Type	Service Time in Hours	County
Alicia	Henry	Empowering Families	06/06/2023	Counseling - Group Session	1.50	Hudson County
Alicia	Henry	Empowering Families	06/09/2023	Counseling - Group Session	2.00	Hudson County
Alicia	Henry	Empowering Families	06/15/2023	Resource Session	0.75	Hudson County
Alicia	Henry	Empowering Families	04/18/2023	Family Coaching	1.50	Hudson County
Alonzo	LaBataille	Workforce Training	04/10/2023	Job Search Supporta	0.75	Hudson County
Alonzo	LaBataille	Counseling	06/06/2023	Counseling - Group Session	1.50	Hudson County
Alonzo	LaBarca	Workforce Assistance	06/06/2023	Counseling - Group Session	1.50	Hudson County
Lara	Crofton	Counseling	06/09/2023	Counseling - Group Session	2.00	Hudson County
Lara	Crofton	Counseling	04/04/2023	Counseling - Individual Session	1.00	Hudson County
Luther	Henderson	Counseling	06/09/2023	Counseling - Group Session	2.00	Hudson County

# Filter Logic

## Trouble Shooting

- Add Parentheses to the logic
- Cross check with preview data

Services by Date and Program ▾

► Forms

▼ Filters +

Service Date Is Between 05/31/2023 and 06/25/2023 ✎

Program Matches Any Of Empowering Families

County Matches Any Of Hudson County

Filter Logic

1 and (2 or 3)

▼ Limit Sections

Report last run June 25th 2023, 4:04 pm  
[Click to refresh data](#)

Search  Q    Displaying 7 of 7 Rows    (Expand All Cells)

First ▼	Last ▼	Program ▼	Service Date ▼	Service Type ▼	Service Time in Hours ▼	County ▼
Alicia	Henry	Empowering Families	06/06/2023	Counseling - Group Session	1.50	Hudson County
Alicia	Henry	Empowering Families	06/09/2023	Counseling - Group Session	2.00	Hudson County
Alicia	Henry	Empowering Families	06/15/2023	Resource Session	0.75	Hudson County
Alonzo	LaBatsille	Counseling	06/06/2023	Counseling - Group Session	1.50	Hudson County
Alonzo	LaBarca	Workforce Assistance	06/06/2023	Counseling - Group Session	1.50	Hudson County
Lara	Crofton	Counseling	06/09/2023	Counseling - Group Session	2.00	Hudson County

# 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.