Apricot
Measuring Client Progress via Forms

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Meet Your Trainer

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Learning Objective

Review best practices for working with some of the advanced form design features in Apricot so that Administrators can make informed decisions when creating new forms.

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Agenda

Masked Value Fields

Look Up Lists

Calculations

Testing Your Design

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Masked Value Fields

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Masked Value Fields

- 3 Types:
  - Likert Scale

Masked Value Fields

- <u>3 Types:</u>
  - Likert Scale
  - Masked Dropdown

Masked Value Fields

- 3 Types:
  - Likert Scale
  - Masked Dropdown
  - Masked Radio Button
- Same function

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Masked Value Fields

- 3 Types:
  - Likert Scale
  - Masked Dropdown
  - Masked Radio Button
- Same function
- Different Formatting

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Masked Value Fields

- Option Fields

- Each Choice has a Backend value

Masked Value Fields

- Option Fields

- Each Choice has a Backend value

- Backend value used to calculate change

Job Readiness Assessment

Main ▾

Assessment Date *
[MM/DD/YYYY] 📅

Assessment Instance *
○ Initial
○ 90 Day
○ 180 Day Instance

I have enrolled in or completed
Strongly Disagree   Disagree

I am confident with my intervie
--Please Select-- ▾

Field Properties (calculation (+) add) ⊠

Display Name
Job Readiness Score

Standard Properties
☐ Required   ☐ Duplicate Check   ☐ Locked
☑ Quick View   ☐ Searchable   ☐ Hidden
☐ Restricted   ☐ Clear On Copy

Special Properties
Minimum Value

Tooltip

Software will sum the numbers associated with each selected response as the score
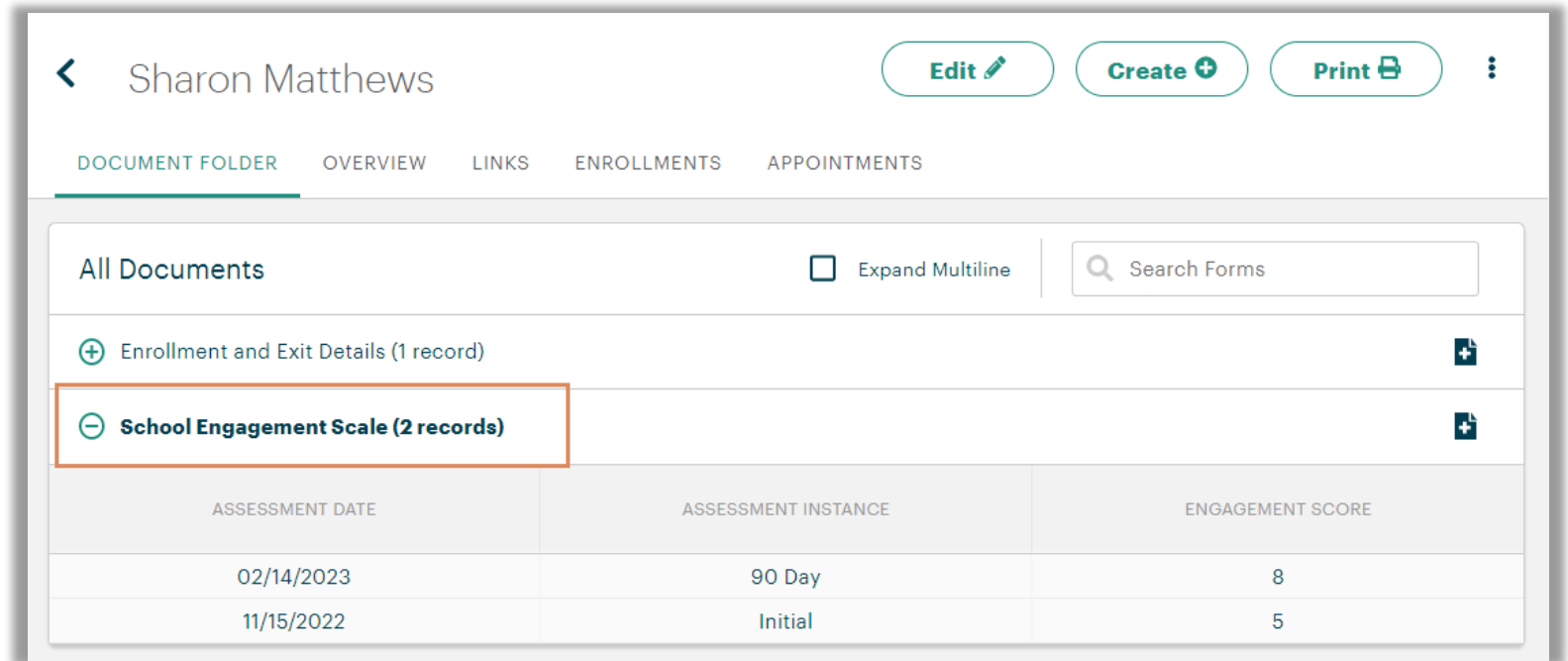
Component Fields ✚
I have enrolled in or completed my GED/HS diploma ▾   ⊠
I am confident with writing my resume ▾   ⊠
I am confident with my interview skills ▾   ⊠
✚ I'm confident with my soft skills ▾   ⊠

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Masked Value Fields

- Option Fields

- Each Choice has a Backend value

- Backend value used to calculate change

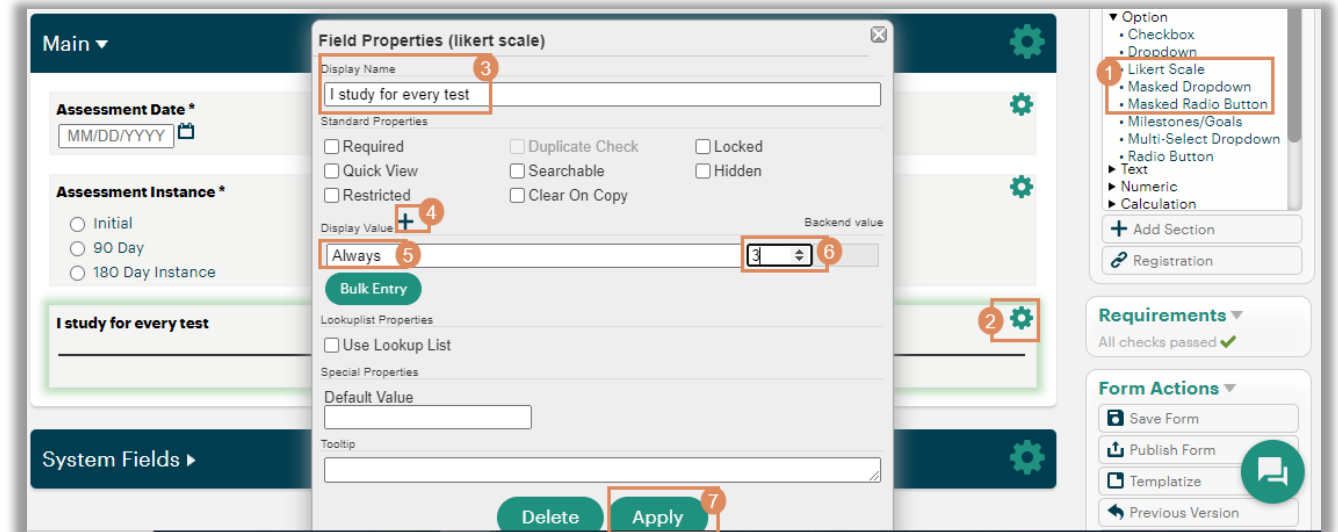- Example: Measuring change in school engagement.

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Working With Masked Value Fields

Steps

1. Drag Masked Value field onto Form

2. Open Field Properties

3. Enter question text in Display Name box

4. Click + next to Field Choices

5. Enter text option in Display Name

6. Enter numeric value in Backend Value

7. Repeat steps 4 – 6 as needed

8. Click Apply

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Look Up Lists

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Look Up Lists

- Saves Time

- Design the Multiple-Choice List once

- Apply to several questions

Look Up Lists

- Saves Time

- Design the Multiple-Choice List once

- Apply to several questions

- Accessed via Left Navigation Bar
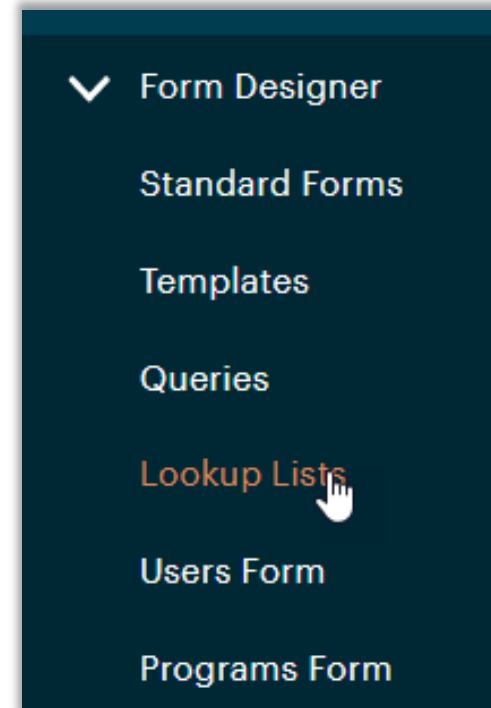
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Look Up Lists

Exist in Categories

Create New Categories as needed

Creating Look Up Lists

Steps

1. Create New Look Up List
2. Select Type
3. Assign Category
4. Name List

Creating Look Up Lists

Steps

1. Create New Look Up List

2. Select Type

3. Assign Category

4. Name List

5. Enter Values

6. Save

Applying Look Up Lists

Steps:

1. Add desired Field Choice

2. Open Field Properties

3. Check Use Look Up List

4. Select Desired List

5. Click Appy

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Calculations

Calculations

Software will not assume

Must be added to get score

Adding Calculations

Steps

1. Select desired math operator in the Calculations Field Choices

2. Open the Field Properties

3. Name your Calculation

4. Select Desired Questions to include in Calculation

5. Use + sign to include additional questions.
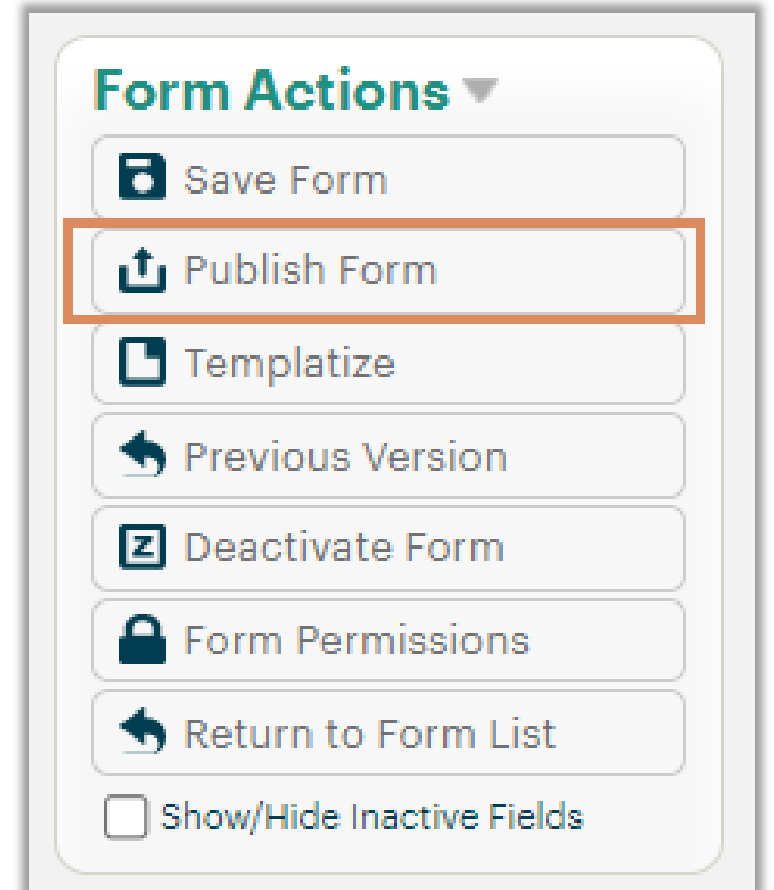
6. Click Apply to Save Your changes

Publish Form

Publish Form to make it available for testing and
data entry.

Testing Your Design

Testing Your Design

Open Data Entry Tab

Create a Fake Record

Additional Resources

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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!

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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

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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!

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Thank you for attending!

We hope to see you
in future trainings.

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