

Apricot Measuring Client Progress via Forms

Meet Your Trainer

Jaime Ransom

Training & Development Associate

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.

Agenda

Masked Value Fields

Look Up Lists

Calculations


Testing Your Design

Masked Value Fields

Masked Value Fields

- 3 Types:
 - Likert Scale

Main ▾

***Assessment Date**
 

***Assessment Instance**

Initial
 90 Day
 180 Day Instance

***I have enrolled in or completed my GED/HS diploma**

—————

Strongly Disagree Disagree Neutral Agree Strongly Agree

I am confident with my interview skills
 ▾

I am confident with writing my resume

Strongly Disagree
 Disagree
 Neutral
 Agree
 Strongly Agree

Masked Value Fields

- 3 Types:
 - Likert Scale
 - Masked Dropdown

The screenshot displays a web form with a dark teal header containing a 'Main' dropdown menu. The form includes several sections:

- *Assessment Date:** A text input field with a calendar icon and a masked format 'MM/DD/YYYY'.
- *Assessment Instance:** Three radio button options: 'Initial', '90 Day', and '180 Day Instance'.
- *I have enrolled in or completed my GED/HS diploma:** A horizontal Likert scale with five points labeled 'Strongly Disagree', 'Disagree', 'Neutral', 'Agree', and 'Strongly Agree', each with a corresponding radio button.
- I am confident with my interview skills:** A masked dropdown menu with the text '--Please Select--' and a downward arrow, highlighted with an orange border.
- I am confident with writing my resume:** Five radio button options: 'Strongly Disagree', 'Disagree', 'Neutral', 'Agree', and 'Strongly Agree'.

Masked Value Fields

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

The screenshot displays a web form with a dark teal header containing the text "Main" and a downward arrow. Below the header, the form contains several sections:

- *Assessment Date**: A text input field with a placeholder "MM/DD/YYYY" and a calendar icon to its right.
- *Assessment Instance**: Three radio button options: "Initial", "90 Day", and "180 Day Instance".
- *I have enrolled in or completed my GED/HS diploma**: A horizontal Likert scale with five points labeled "Strongly Disagree", "Disagree", "Neutral", "Agree", and "Strongly Agree". Each point has a radio button above it.
- I am confident with my interview skills**: A dropdown menu with the text "--Please Select--" and a downward arrow.
- I am confident with writing my resume**: Five radio button options: "Strongly Disagree", "Disagree", "Neutral", "Agree", and "Strongly Agree". This section is enclosed in an orange rectangular box.

Masked Value Fields

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

Main ▾

***Assessment Date**
 📅

***Assessment Instance**

Initial
 90 Day
 180 Day Instance

***I have enrolled in or completed my GED/HS diploma**

— Strongly Disagree — Disagree — Neutral — Agree — Strongly Agree

I am confident with my interview skills
 ▾

I am confident with writing my resume

Strongly Disagree
 Disagree
 Neutral
 Agree
 Strongly Agree

Masked Value Fields

- Option Fields
- Each Choice has a Backend value

Job Readiness Assessment

Main ▾

Field Properties (masked dropdown)

Display Name: I am confident with my interview skills

Standard Properties: Duplicate Check, Searchable, Clear On Copy

Restricted

Shows on Data Entry

Masked from Data Entry but can be used in calculations

Display Value +	Backend value
Strongly Disagree	1
Disagree	2
Neutral	3
Agree	4
Strogly Agree	5

Bulk Entry

Lookuplist Properties

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 interview

--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

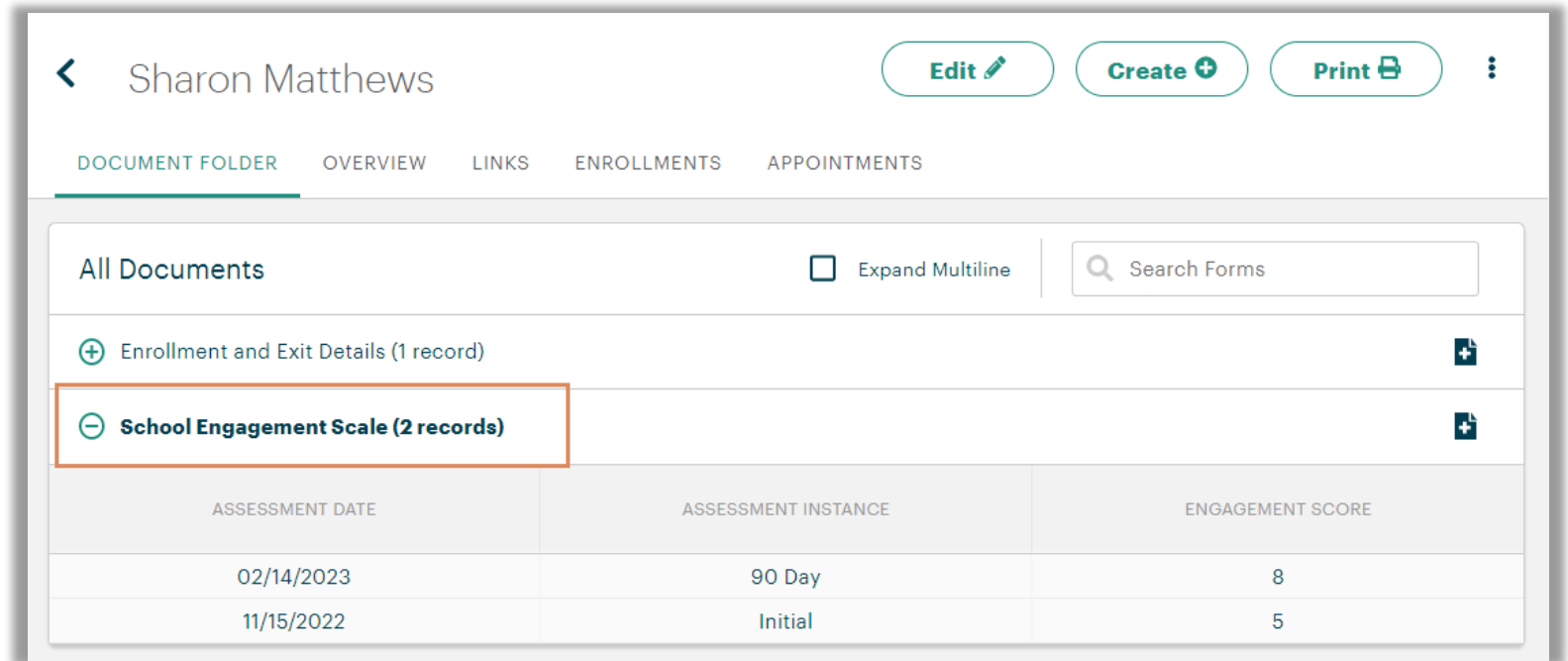
Component Fields +

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 ▾

Software will sum the numbers associated with each selected response as the score

Masked Value Fields

- Option Fields
- Each Choice has a Backend value
- Backend value used to calculate change
- Example: Measuring change in school engagement.



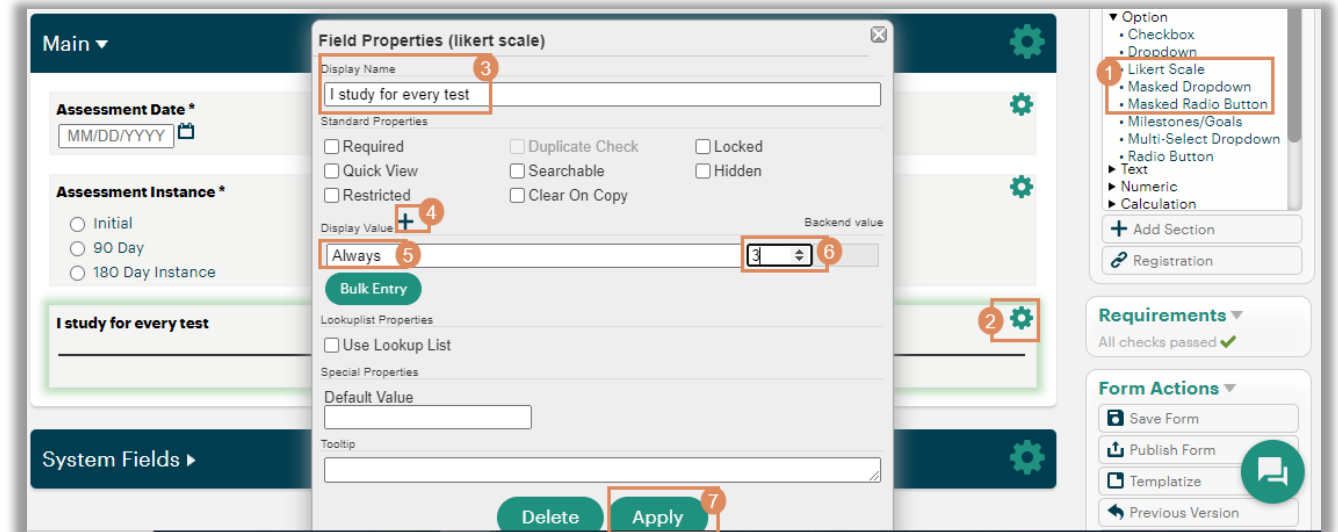
The screenshot shows a user profile for Sharon Matthews with navigation tabs for DOCUMENT FOLDER, OVERVIEW, LINKS, ENROLLMENTS, and APPOINTMENTS. Under the DOCUMENT FOLDER tab, there is a section for 'All Documents' with an 'Expand Multiline' checkbox and a 'Search Forms' input. Two document entries are listed: 'Enrollment and Exit Details (1 record)' and 'School Engagement Scale (2 records)'. The 'School Engagement Scale' entry is highlighted with an orange box. Below this, a table displays assessment data.

ASSESSMENT DATE	ASSESSMENT INSTANCE	ENGAGEMENT SCORE
02/14/2023	90 Day	8
11/15/2022	Initial	5

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



Look Up Lists

Look Up Lists

- Saves Time
- Design the Multiple-Choice List once
- Apply to several questions

Strongly Disagree to Strongly Agree (masked lookup list) 

Used In ▼

Job Readiness Assessment [View](#)

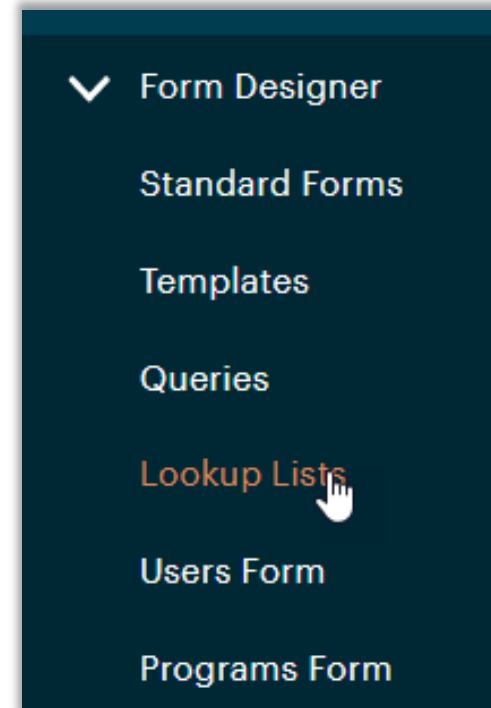
- 1 I have enrolled in or completed my GED/HS diploma
- 2 I'm confident with my soft skills

Build Lookup List ▼ [Add Rows](#)

Display Value ▼	Backend Value ▼
Strongly Disagree	1
Disagree	2
Neutral	3
Agree	4
Strongly Agree	5

Look Up Lists

- Saves Time
- Design the Multiple-Choice List once
- Apply to several questions
- Accessed via Left Navigation Bar



Look Up Lists

Exist in Categories

Create New Categories as needed

The screenshot displays the Bonterra software interface for managing lookup lists. On the left is a dark sidebar with navigation items: Standard Forms, Templates, Queries, **Lookup Lists** (highlighted), and Users Form. The main content area is titled 'Lookup Lists' and features a 'Manage Lookup Lists' header. Below this header is a list of categories: 'Demographics' and 'Assessments & Surveys', each with a right-pointing arrow and a gear icon. An orange callout box labeled 'Existing Categories' points to the 'Demographics' category. On the right side of the main content area, there is a panel titled 'EXPAND ALL' containing a 'Lookup List Actions' dropdown menu. This menu includes three options: '+ Create New Category' (highlighted with an orange border), '+ Create New Lookup List', and 'Show Inactive Lists' (with an unchecked checkbox).

Creating Look Up Lists

Steps

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

The screenshot shows a 'New Lookup List' form with three main sections, each marked with a numbered orange circle:


- Type *** (Step 2): Radio buttons for 'Simple' and 'Masked'. 'Masked' is selected.
- Category *** (Step 3): A dropdown menu showing 'Assessments & Surveys'.
- List Name *** (Step 4): An empty text input field.



A green 'Create' button with a plus icon is located at the bottom right of the form.




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






Always Sometimes Never (masked lookup list) 

Build Lookup List  

Display Value 	Backend Value 
Display Value: Empty Rows will be removed upon save and refresh	Backend Value 
Display Value: Empty Rows will be removed upon save and refresh	Backend Value

COLLAPSE ALL

Lookup List Actions 

-  Save Lookup List 
-  Delete Lookup List
-  Enable Bulk Entry
-  Return to All Lists

Lookup List

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 Apply

The screenshot shows a dialog box titled "Field Properties (likert scale)". The "Display Name" field contains the text "I'm confident with my soft skills". Under the "Standard Properties" section, there are several checkboxes: "Required", "Duplicate Check", "Locked", "Quick View", "Searchable", "Hidden", "Restricted", and "Clear On Copy". Under the "Lookuplist Properties" section, the "Use Lookup List" checkbox is checked. Below this, a dropdown menu is open, showing a list of options: "--Please Select--", "Demographics", "Test", "Assessments & Surveys", and "Strongly Disagree to Strongly Agree". The "Demographics" option is highlighted. At the bottom of the dialog, there are two buttons: "Deactivate" and "Apply".

Field Properties (likert scale)

Display Name
I'm confident with my soft skills

Standard Properties

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

Lookuplist Properties

- Use Lookup List

--Please Select--

Demographics

Test

Assessments & Surveys

Strongly Disagree to Strongly Agree


Deactivate Apply

Calculations

Calculations

Software will not assume
Must be added to get score

Assessment ▾

***Assessment Date**
 

***Assessment Instance**

Initial
 90 Day
 180 Day Instance

***I have enrolled in or completed my GED/HS diploma**

Strongly Disagree Disagree Neutral Agree Strongly Agree

I am confident with my interview skills
 ▾

I am confident with writing my resume

Strongly Disagree
 Disagree
 Neutral
 Agree
 Strongly Agree

I'm confident with my soft skills

Strongly Disagree Disagree Neutral Agree Strongly Agree

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

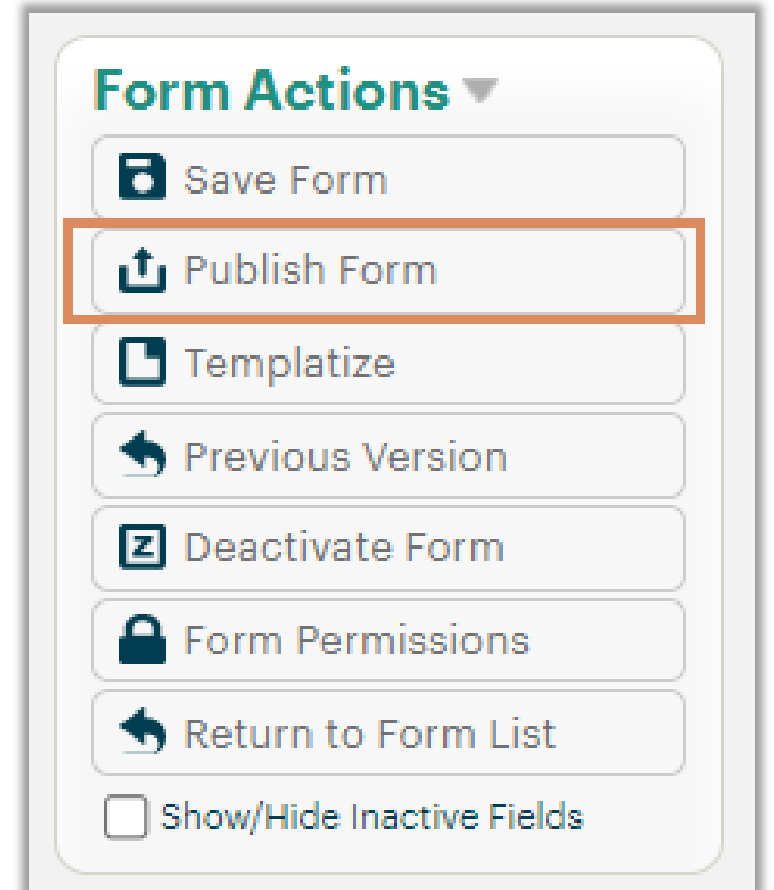
The screenshot displays the 'Job Readiness Assessment' interface. A 'Field Properties (calculation (+) add)' dialog box is open, showing the configuration for a new calculation field. The dialog box is divided into several sections:

- Display Name:** A text input field containing 'Job Readiness Score'.
- Standard Properties:** A grid of checkboxes for 'Required', 'Duplicate Check', 'Locked', 'Quick View' (checked), 'Searchable', and 'Hidden'.
- Special Properties:** Input fields for 'Minimum Value' and 'Maximum Value'.
- Tooltip:** A text input field for a tooltip.
- Component Fields:** A list of questions with dropdown arrows, including 'I have enrolled in or completed my GED/HS diploma', 'I am confident with writing my resume', 'I am confident with my interview skills', and 'I'm confident with my soft skills'. A '+' sign and the number '5' are next to the list header.

Numbered callouts (1-5) highlight key elements: 1 points to the '+ add' button, 2 to the dialog title, 3 to the display name field, 4 to the component fields list, and 5 to the '+' sign in the component fields header.

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

The screenshot shows a user profile page for Sharon Matthews. At the top, there are navigation tabs: DOCUMENT FOLDER (selected), OVERVIEW, LINKS, ENROLLMENTS, and APPOINTMENTS. Below the tabs, there is a section titled 'All Documents' with an 'Expand Multiline' checkbox and a 'Search Forms' input field. The document list includes 'Enrollment and Exit Details (1 record)' and 'School Engagement Scale'. The 'Add' button (a square with a plus sign) for 'School Engagement Scale' is highlighted with a red box.

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.