

# Working With Templates

Apricot Fundamentals

We will begin shortly!

# Meet Your Trainer

Megan Dodds

Sr. Training Specialist

[clienttrainingrequests@bonterratech.com](mailto:clienttrainingrequests@bonterratech.com)



# Learning Objective

This training will cover:

- Form Templates
- Report Templates

By the end of this session, the goal is for you to understand how to effectively utilize the templates within Apricot to expedite your creation of forms and reports.

# Agenda

Form Templates

Report Templates

# Form Templates

# Apricot Forms

- Tier 1 and Tier 2 forms used to track data entry within Apricot
- Tier 1 forms are generally used for collecting demographic information
  - Intake Forms
  - Participant Profile
- Tier 2 forms are generally used for tracking services data
  - Counselling Notes
  - Workshop Attendance


Services / Case Notes


**Michael L Jones**  
Quick View Information ▶

Main ▼


**\* Related Program Enrollment**

Links to be Added Upon Save  
- Housing & Food Pantry

**Program**   
Housing & Food Pantry ▼

**\*Date of Service**  
04/29/2024 

**\*Service Provided**  
Meal Provided ▼

**\*Total Time**   
30

**Did you discuss goals?**

Yes  
 No

**Service Notes**

Intro discussion around food security workshops and meal provided. Will dive into goals if client agrees to participate further.



# Pre-Published Forms

In your new Apricot, you may notice some pre-published forms built with the intention of creating a basic workflow process for you to elaborate on.

You can incorporate any of these Tier 1 and Tier 2 forms into your Apricot!

Standard Forms

Select the Form You Wish to Modify Below

 Participant Profile ▼	Actions ▶
Last Modified by: Megan Dodds on 04/30/2024 3:11 PM CDT	
 Program Enrollment and Exit ▶	Actions ▶
 Individualized Service ▶	Actions ▶
 Counseling Appointment ▶	Actions ▶
 Positive Parenting Assessment ▶	Actions ▶
 Workshop Attendance ▶	Actions ▶

# Participant Blueprint

One of these forms, is our Participant Blueprint:

- Restricted form created to track demographic/intake data for your participants
- Set up with some best practices for data collection – ie: name, standardized DOB, standardized address etc.
- Plan to build out exciting capabilities around this form
- Ability to add additional sections for agency specific fields

The screenshot displays a web form titled "Participant" with a "Participant Details" section. The form includes several input fields and dropdown menus, each with a gear icon for configuration. The fields are: "Legal Name" (split into First, Middle, and Last), "Pronouns" (a dropdown menu), "Preferred Name/Nickname", "Date of Birth" (MM/DD/YYYY), "Social Security Number" (three separate boxes), "Monthly Income" (a text box with "\$1,000.00"), "Email" (customer\_care@apricot.), "Mobile Phone" (three boxes followed by "ext."), and "Home Phone" (three boxes followed by "ext.").



# Template Library

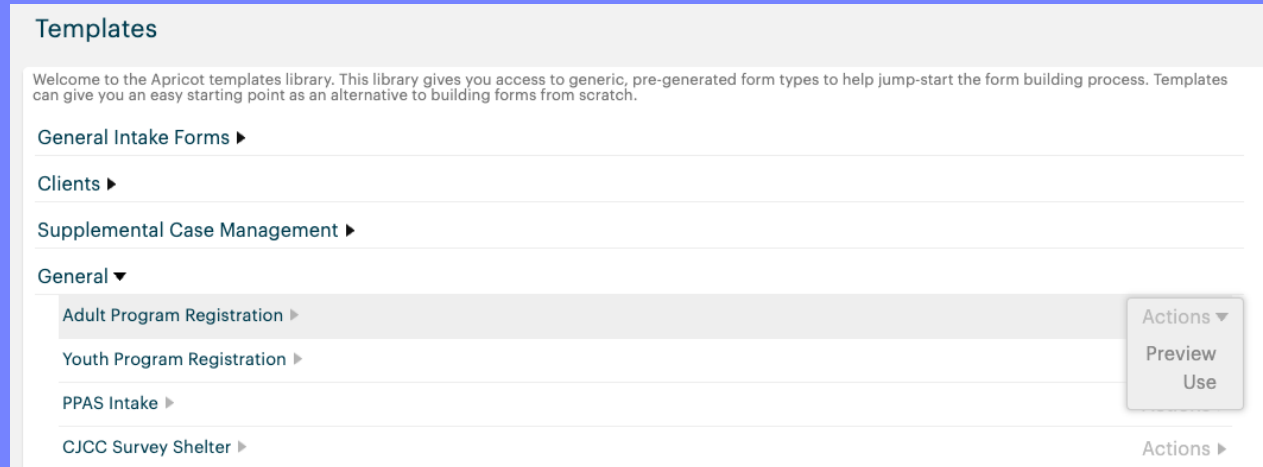
- The template library includes a number of generic forms and assessments that you can use to save time as you dive into form building in Apricot

The screenshot displays the Apricot 360 Administrator interface. The top navigation bar includes a menu icon, the Apricot 360 logo, the user role 'ADMINISTRATOR', and options for 'All Sites' and 'Program All Programs'. On the right, there are icons for 'CHANGE', 'NOTIFICATIONS', and a user profile picture. A dark teal sidebar on the left contains navigation links: Dashboard, Inventory, Form Designer (with a dropdown arrow), Standard Forms, Templates (highlighted in orange), Lookup Lists, and Smart Field Presets. The main content area is titled 'Templates' and contains a welcome message: 'Welcome to the Apricot templates library. This library gives you access to generic, pre-generated form types to help jump-start the form building process. Templates can give you an easy starting point as an alternative to building forms from scratch.' Below the message is a list of template categories, each with a right-pointing arrow: General Intake Forms, Clients, Supplemental Case Management, General, Training, and Surveys and Assessments.

# Using Templates from the Library

- Select the arrow beside the "type" of form you would like to create (ie. Clients, Surveys and Assessments etc.)
- Navigate to the specific template you want to use
- Select the 'Actions' button and either 'Preview' or 'Use'

If you are not changing the template, you can publish it immediately to make it active in your system. Otherwise, the form is now ready for you to customize!



The screenshot shows a web interface titled "Templates". At the top, there is a welcome message: "Welcome to the Apricot templates library. This library gives you access to generic, pre-generated form types to help jump-start the form building process. Templates can give you an easy starting point as an alternative to building forms from scratch." Below this, there are several categories of templates, each with a right-pointing arrow: "General Intake Forms", "Clients", "Supplemental Case Management", and "General". Under the "General" category, there are four items: "Adult Program Registration", "Youth Program Registration", "PPAS Intake", and "CJCC Survey Shelter". To the right of the "Adult Program Registration" item, there is a button labeled "Actions" with a dropdown arrow. This button is open, showing two options: "Preview" and "Use". To the right of the "CJCC Survey Shelter" item, there is another button labeled "Actions" with a right-pointing arrow.

# NOTE!

Using a form from the template library will create a **TIER 1 form** in your database.

If you want to create a form that will be used to track services or be completed multiple times for each participant, you will want to create a Tier 2 form instead.

# Creating a Tier 2 from Template

- Navigate to the 'Form Designer' drawer on the right-hand side of the Administrator Tab
- Open the 'Standard Forms' section
- Select the arrow to the right of the Tier 1 form that your Tier 2 should fall under
- Select 'New Tier 2 from Template'
- Navigate to the specific template you want to use
- Select the 'Actions' button and either 'Preview' or 'Use'

The screenshot displays the Bonterra Administrator interface. On the left is a dark teal sidebar with a 'Form Designer' drawer expanded, showing options: Dashboard, Inventory, Form Designer (selected), Standard Forms, Templates, Queries, and Lookup Lists. The main content area is titled 'Standard Forms' and contains a dark teal header with the text 'Select the Form You Wish to Modify Below'. Below this header is a list of form categories: Household, Participant, Class Profile, Staff/Volunteer Profile, and Donor Profile. Each category has a right-pointing arrow. An 'Actions' dropdown menu is open over the 'Participant' category, showing options: Edit, New Tier 2 From Scratch, and New Tier 2 From Template (highlighted in green).

# Publishing Your Template

Prior to publishing your new form, there are two things to keep in mind:

1. Fulfil any unmet requirements noted on the right-hand side (ie. Record name, required fields, duplicate check, etc.)
2. Set the form permissions to ensure staff can access the form once it has been published. By default, there are **NO** form permissions set up.

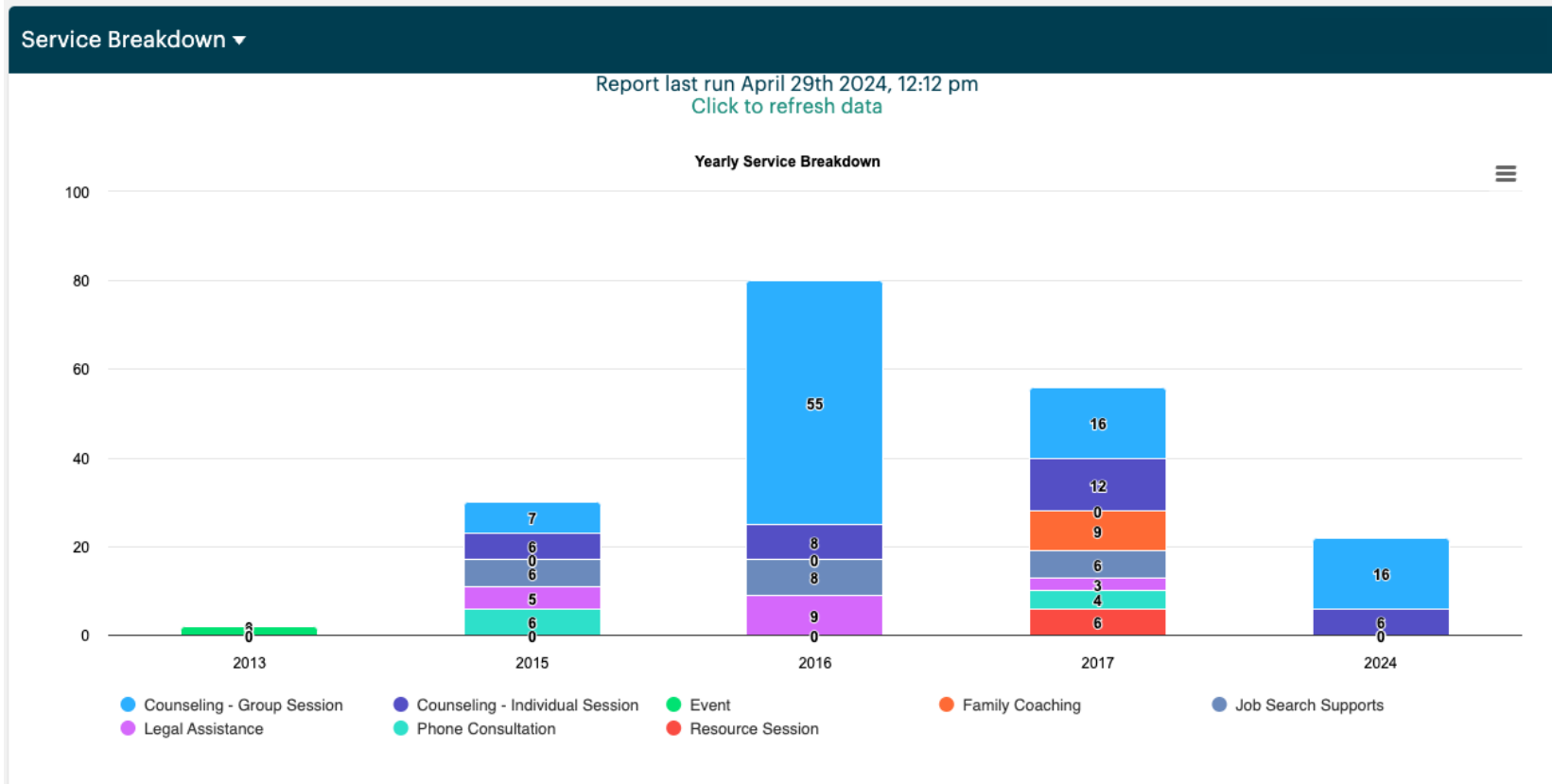
If you are not making any changes to the template, these are the only two considerations required before publishing!

The screenshot shows a user interface for publishing a form template. It is divided into two main sections: 'Requirements' and 'Form Actions'. The 'Requirements' section is highlighted with a red circle containing the number '1'. It contains the text 'Publish checklist' followed by a red 'X' icon, and a bullet point: '• No record name chosen'. The 'Form Actions' section is highlighted with a red circle containing the number '2'. It contains a list of buttons: 'Save Form', 'Publish Form', 'Templatize', 'Previous Version', 'Deactivate Form', 'Form Permissions', 'Return to Form List', and 'Show/Hide Inactive Fields'. The 'Form Permissions' button is highlighted with a red circle containing the number '2'.

# Report Templates

# Apricot Reports

- Reports are built in Apricot to provide you with key insights and summaries of the data collected within your forms
- Can create cyclical reports for funders or data quality reports for administrators
- Reports may show where data is missing, participant change over time, numbers of clients served, demographic breakdowns and more!



# Report Templates

- Reports are built from the 'Report Center' on the Administrative side of Apricot
- Any default reports will populate when you navigate to the 'Reports' section

The screenshot displays the Apricot 360 Administrator interface. The top navigation bar includes a 'MENU' icon, the 'apricot 360' logo, and the user's role 'ADMINISTRATOR'. A dark teal sidebar on the left contains a menu with the following items: Dashboard, Inventory, Form Designer, Report Center (expanded), Reports (highlighted in orange), Aggregate Reports, Data Archives, and Report Migrations. The main content area is titled 'Reports' and features a dark teal header with the text 'Select the Report You Wish to Modify Below'. Below this header, a list of report categories is shown, each with a right-pointing arrow: Case Management Reports, Apricot Site Administration Reports, Executive Reports, Referral Reports, Class Attendance (Registration Grid) Reports, Employment Tracking Reports, and Pantry Management Reports.



# Using A Report

- Select the arrow beside the appropriate section of reports to see what is available
- Select the green cog on the right of the report you wish to open
- Select 'Edit'

## Reports

Select the Report You Wish to Modify Below

### Case Management Reports ▼



📄 Enrollment Summary (In Time Range) 🔒 ▶

📄 Services 🔒 ▶

📄 Case Management Bulletin Report 🔒 ▶

Actions ▼

Edit

Actions ▶



# Best Practice: Copying A Report

**Best practice is to copy the existing report prior to making any changes.** This preserves the original so that you can use it in the future if you made a mistake, or simply need to create another similar report.

Note the lock icon beside some of these reports, once opened you cannot edit without first copying the report.

Reports

Select the Report You Wish to Modify Below

Case Management Reports ▾

- Enrollment Summary (In Time Range) 🔒 ▶
- Services 🔒 ▶
- Case Management Bulletin Report 🔒 ▶

Report Actions ▾

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

# Using A Report

Once you have selected 'Copy Report', you will be prompted to select a new Category and Report name.

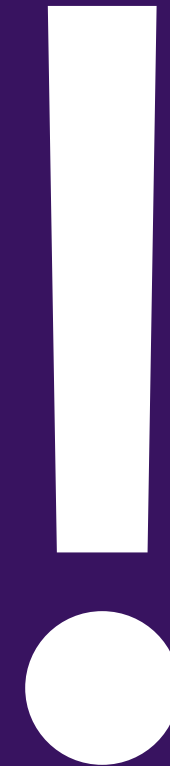
Fill in these fields, then select 'Create' to open your new copied version of the report that is ready for publication or to be edited to meet your needs!

The screenshot shows a 'New Report' dialog box overlaid on a software interface. The dialog box has two main input fields: 'Category \*' with a dropdown menu showing '--Please Select--' and an 'Add' button, and 'Report Name \*' with a text input field and a 'Create' button. The background interface includes a sidebar with 'Global Values', 'New Section', and 'Filters' sections. The 'Filters' section shows 'Total Time Is Empty' and 'Service Provided Is Empty' with a 'Filter Logic' dropdown set to '1 OR 2'. Below the filters, there is a 'Limit Sections' section and a table with columns 'Record ID', 'Record ID', 'Service Provided', and 'Total Time'. A status message indicates the report was last run on April 30th, 2024, at 11:16 am, and provides links to refresh data and turn auto-run back on. On the right side of the interface, there is a 'Field Choices' panel with a tree view of categories like 'Special Columns', 'Sites and Programs', 'Attendance Tracker', 'Enrollments', 'Household', 'Users', and 'Participant'. Below this are 'Requirements' (All checks passed) and 'Report Actions' (Add New Section, Save Report, Copy Report, Publish Report, Revert Report, Delete Report, Return to Report List).

# NOTE!

Reports will need to be made available to the appropriate staff through role-based permissions.

Reports are defaulted to **not** be automatically available so ensure you navigate to the appropriate roles and grant access.



# 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)

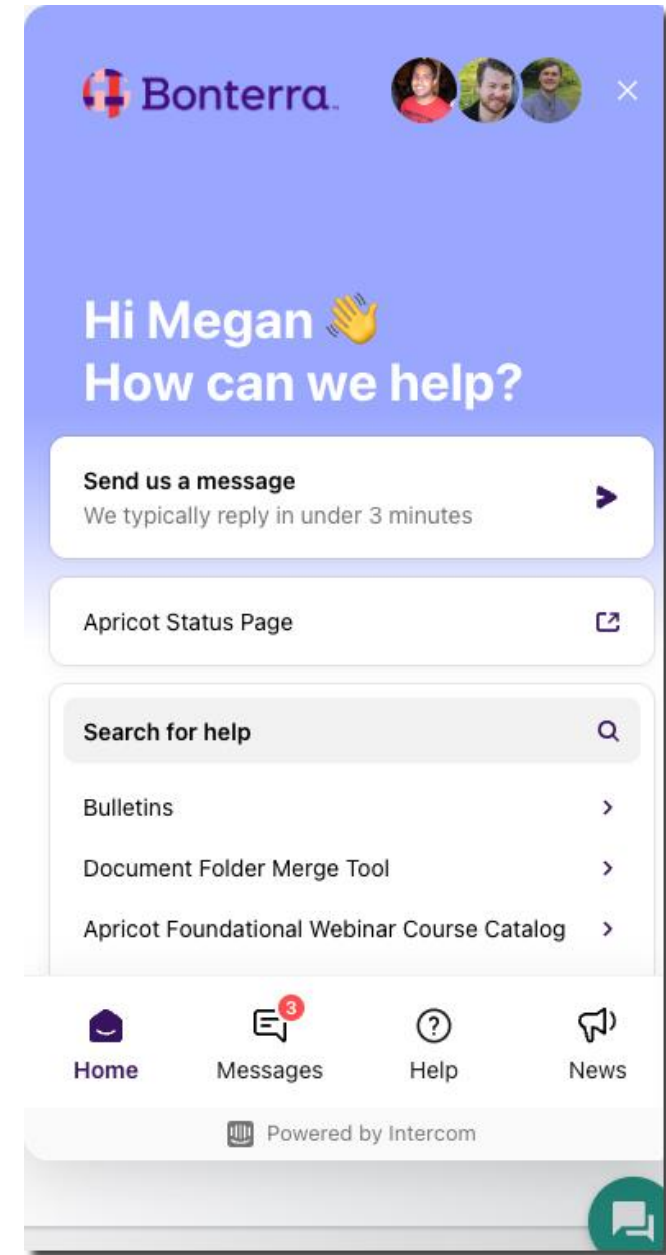


Build confidence & knowledge in  
our software!

# 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.