Working With Templates

Apricot Fundamentals

We will begin shortly!

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Meet Your Trainer

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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

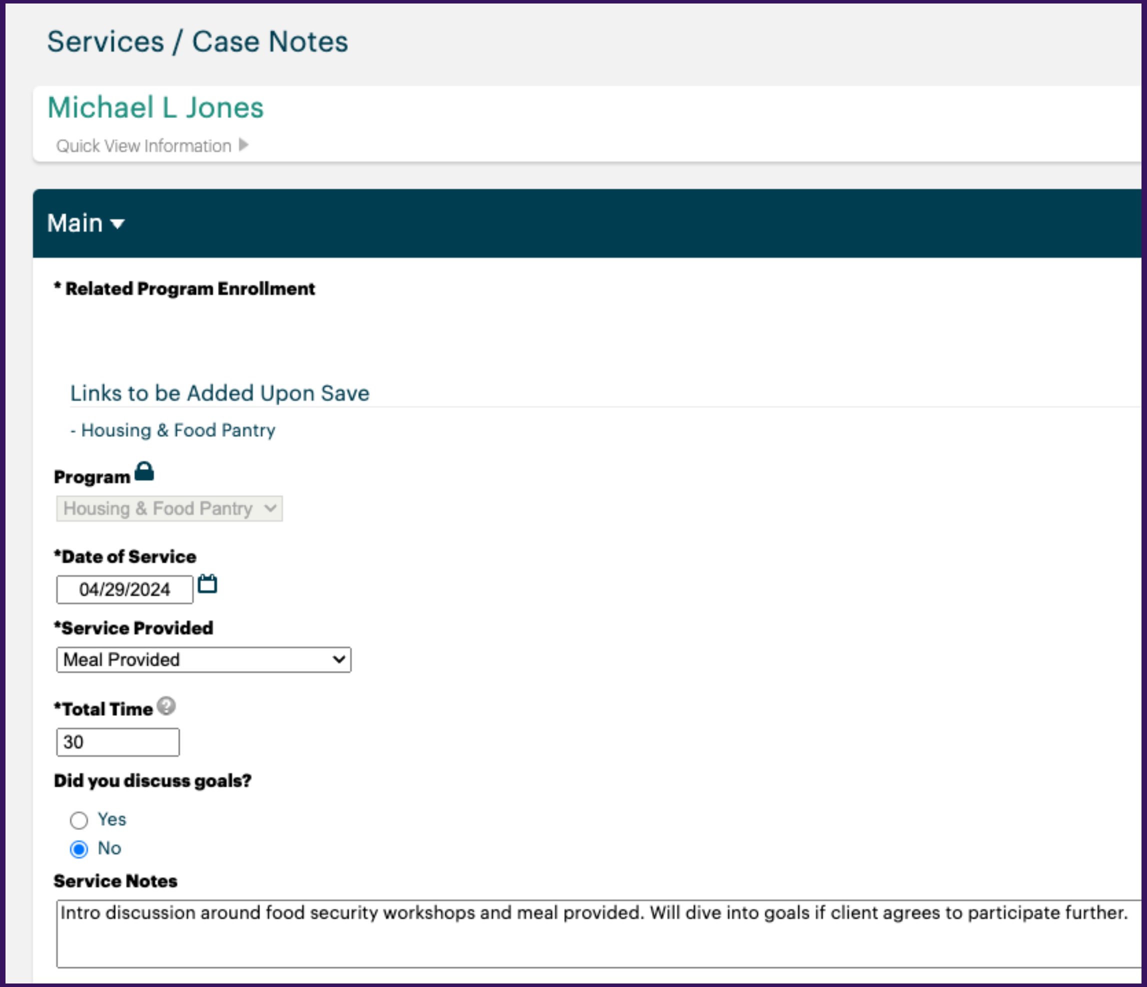
Form Templates

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



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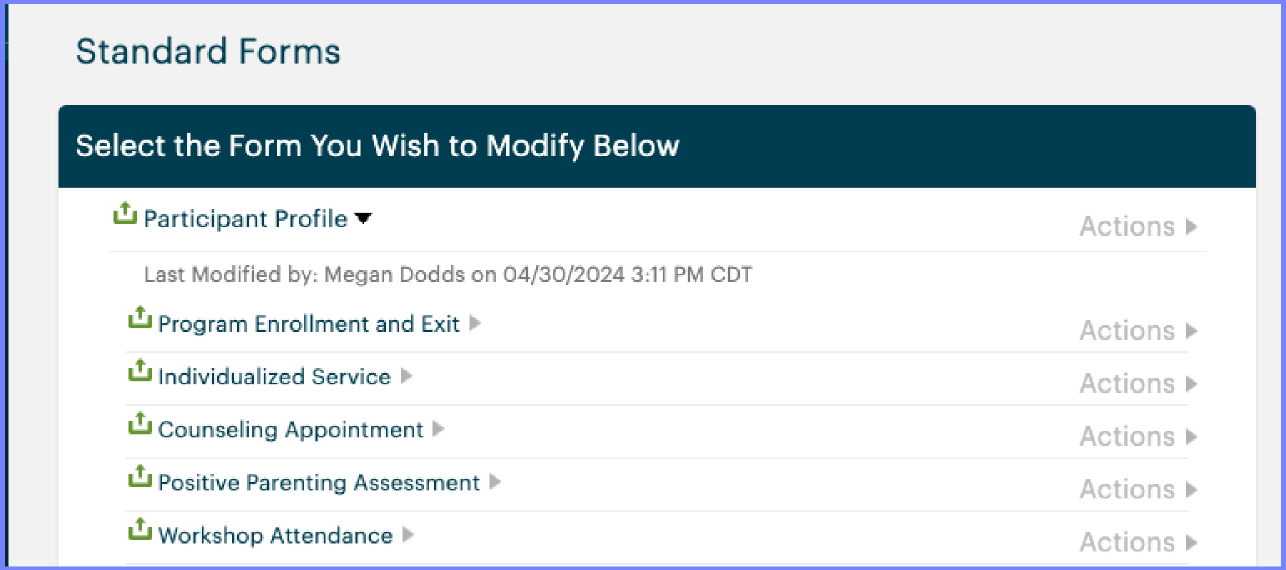
Pre-Published Forms

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.

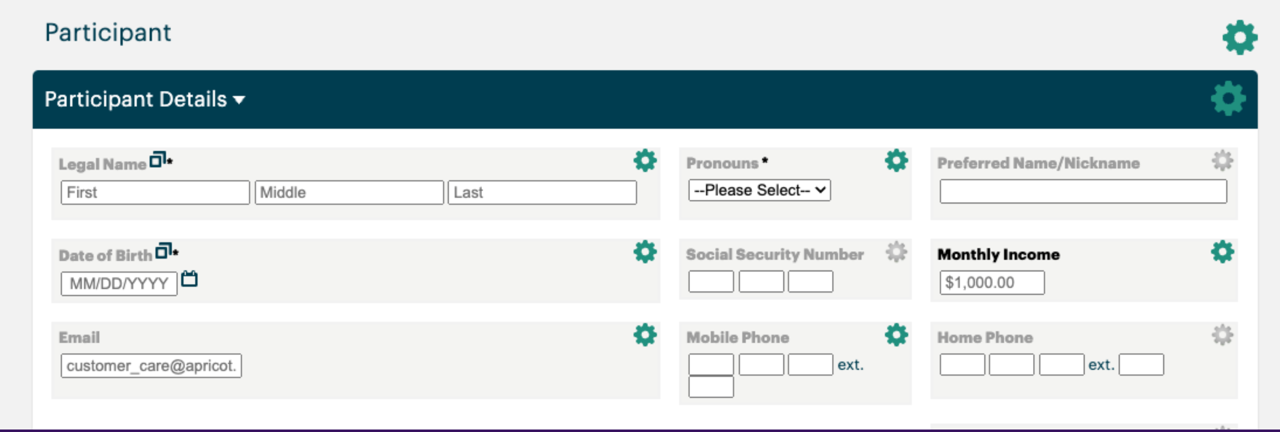
You can incorporate any of these Tier 1 and Tier 2 forms into your Apricot!



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



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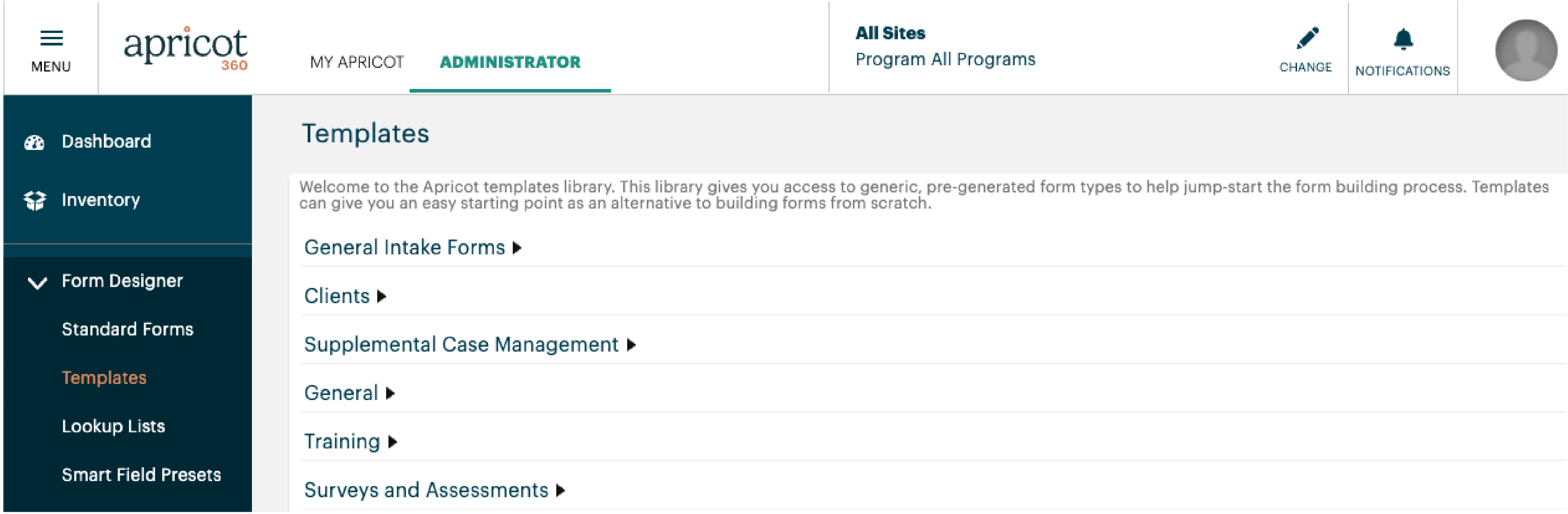
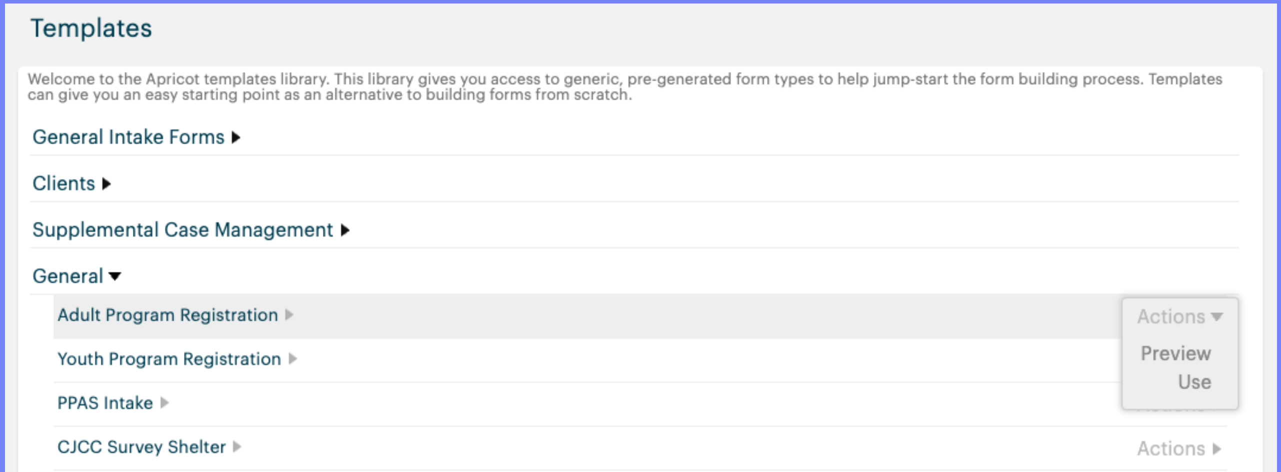
Template Library

- 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



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!

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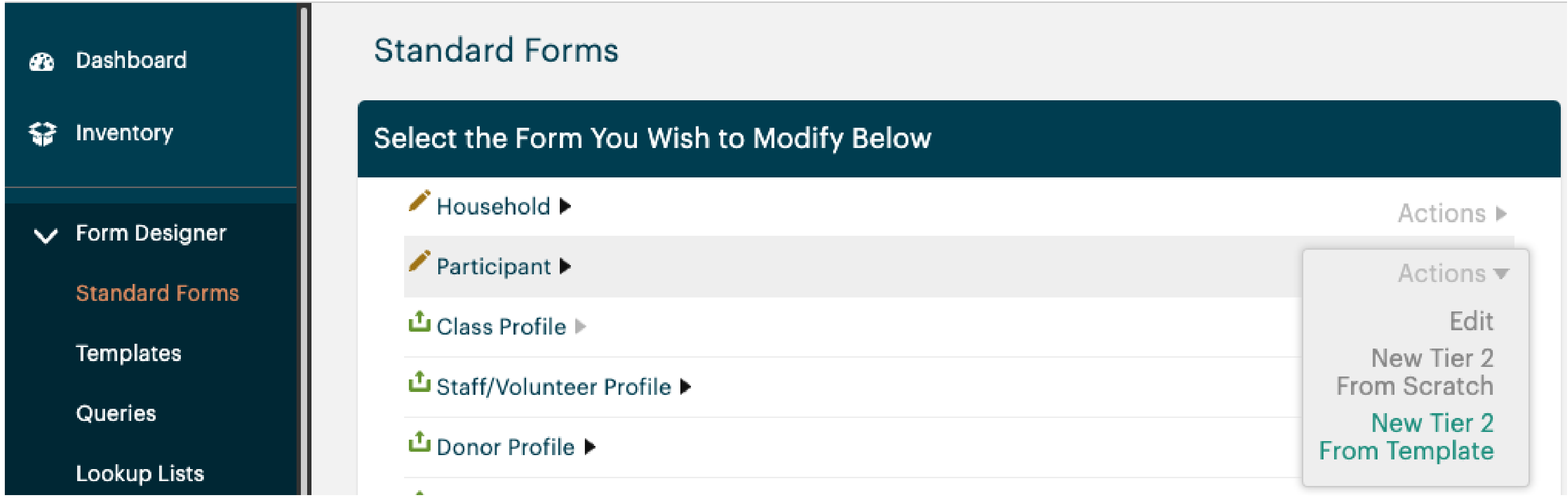
NOTE!

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’



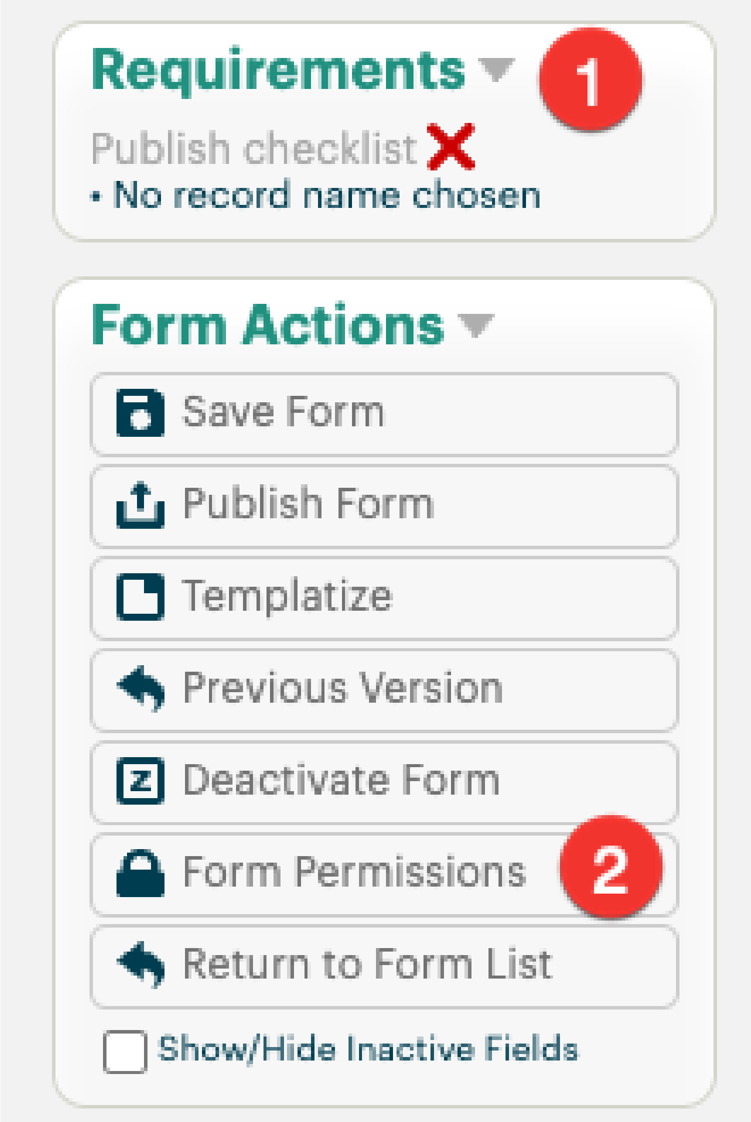
Publishing Your Template

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!



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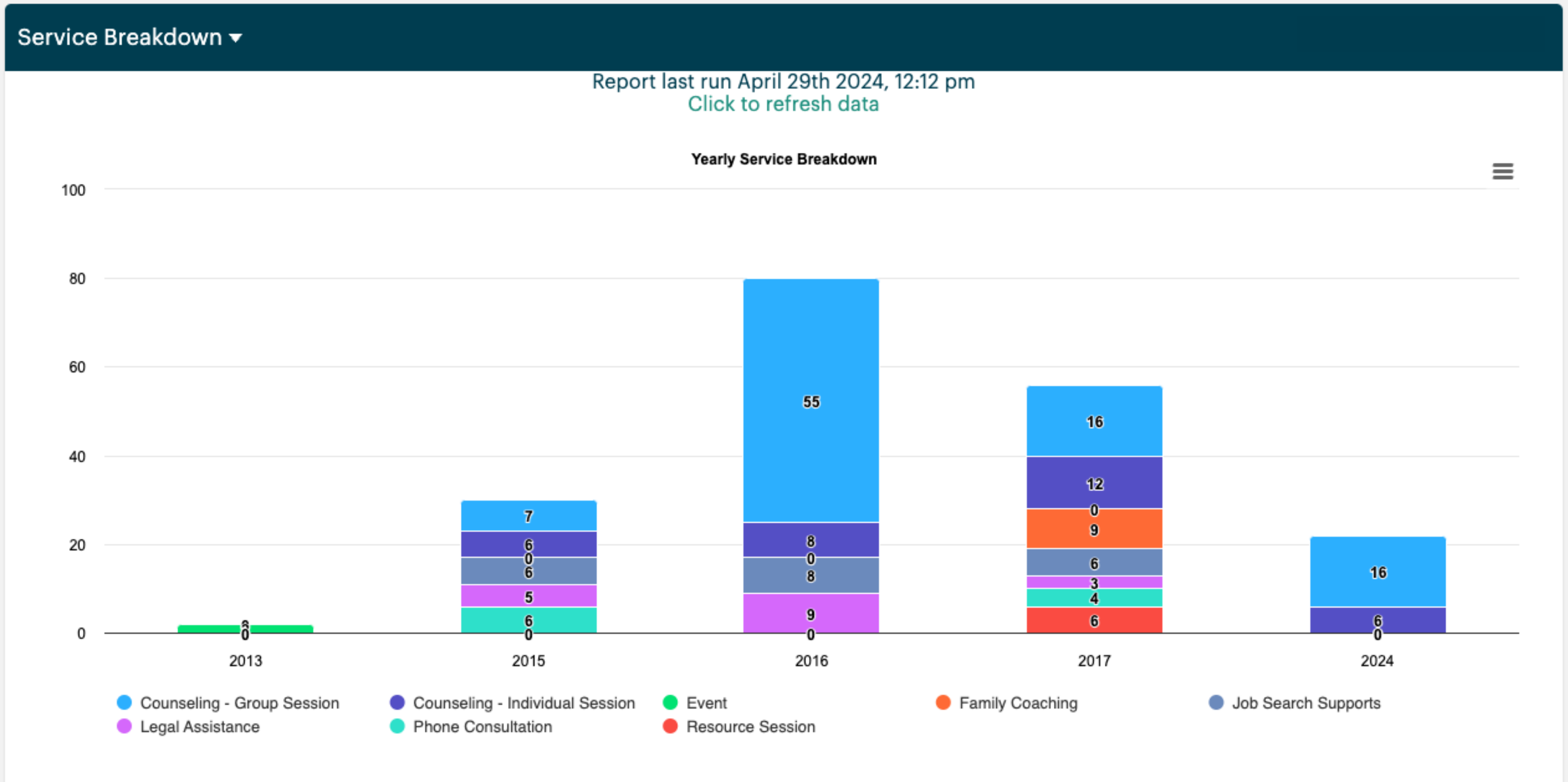
Report Templates

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!



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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

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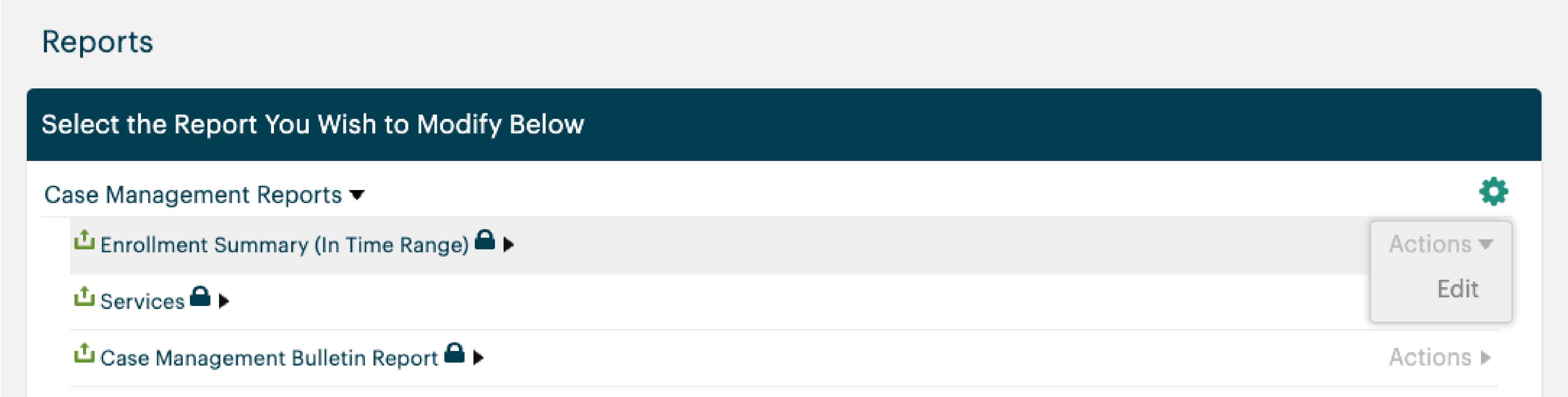
Using A Report

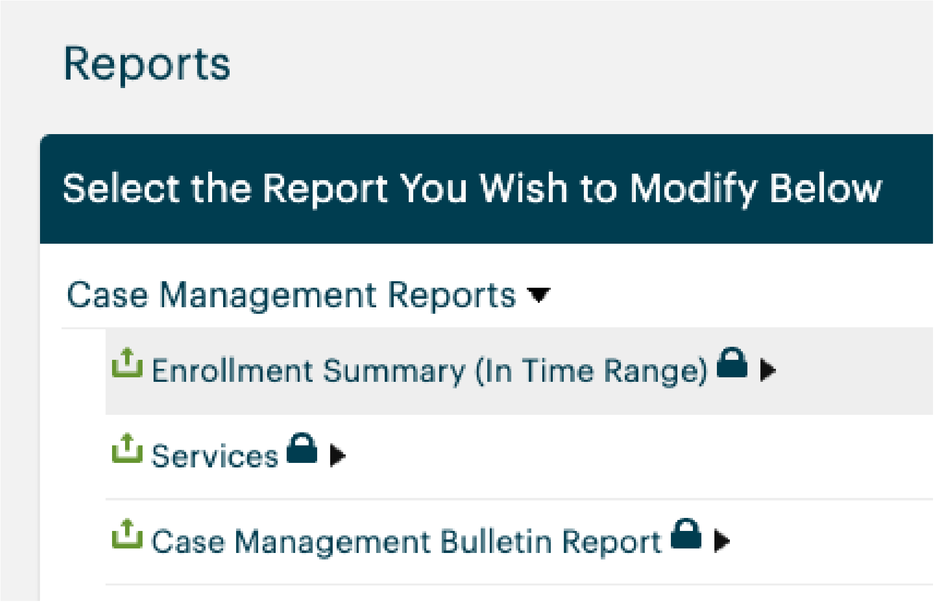
- Select the arrow beside the appropriate section of reports to see what is available
- Select the green cog on the right of the report you wish to open
- Select ‘Edit’

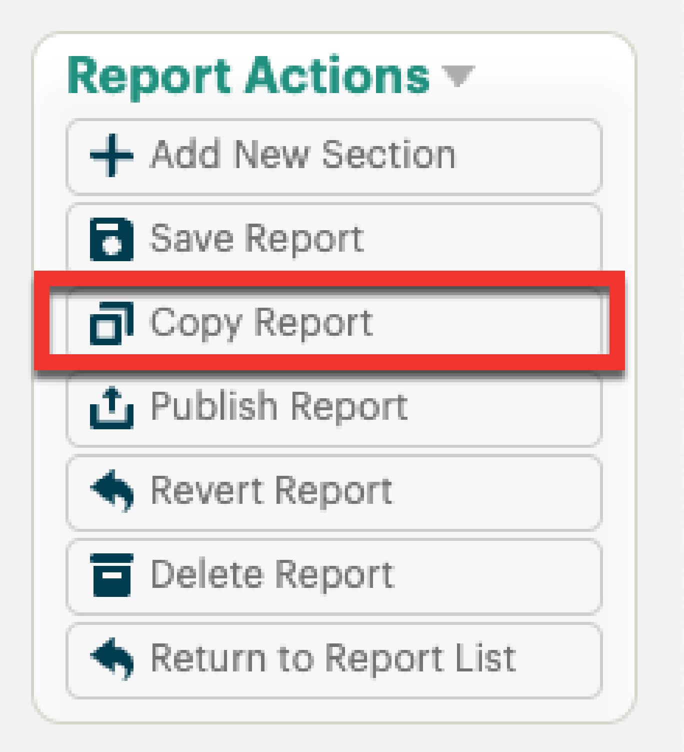


Best Practice: Copying A Report

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.





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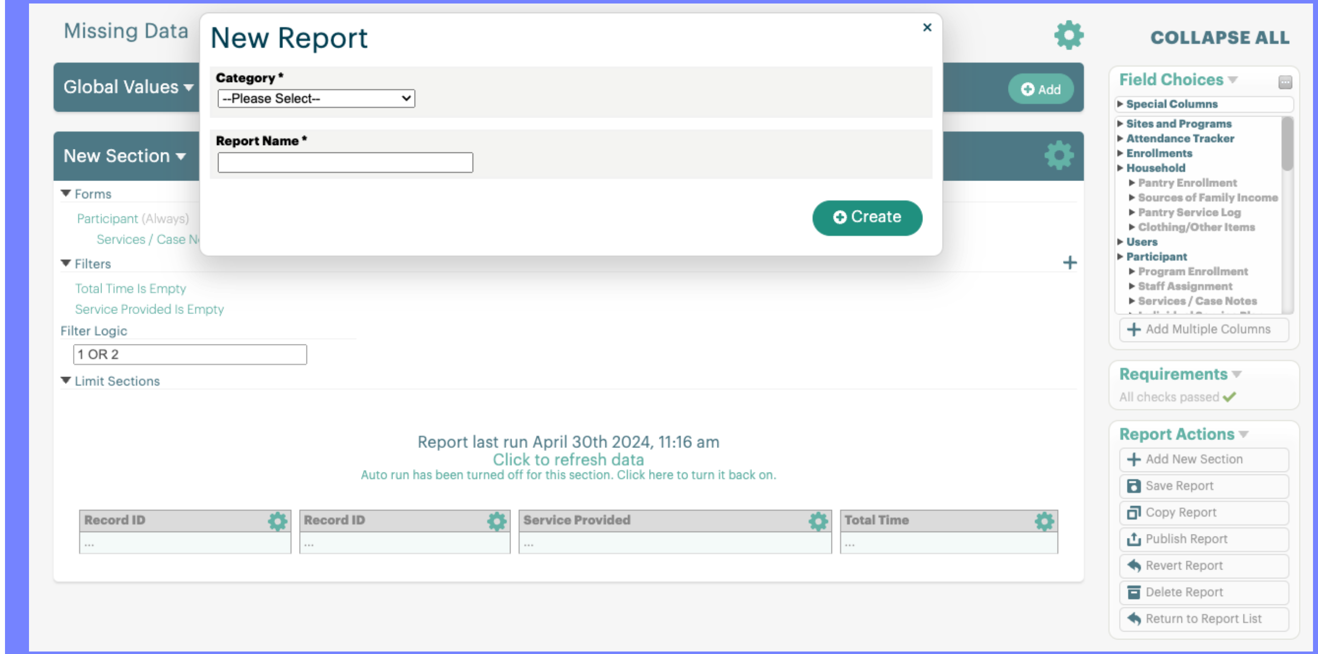
Using A Report

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!



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.

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Additional Resources

Additional Training Opportunities

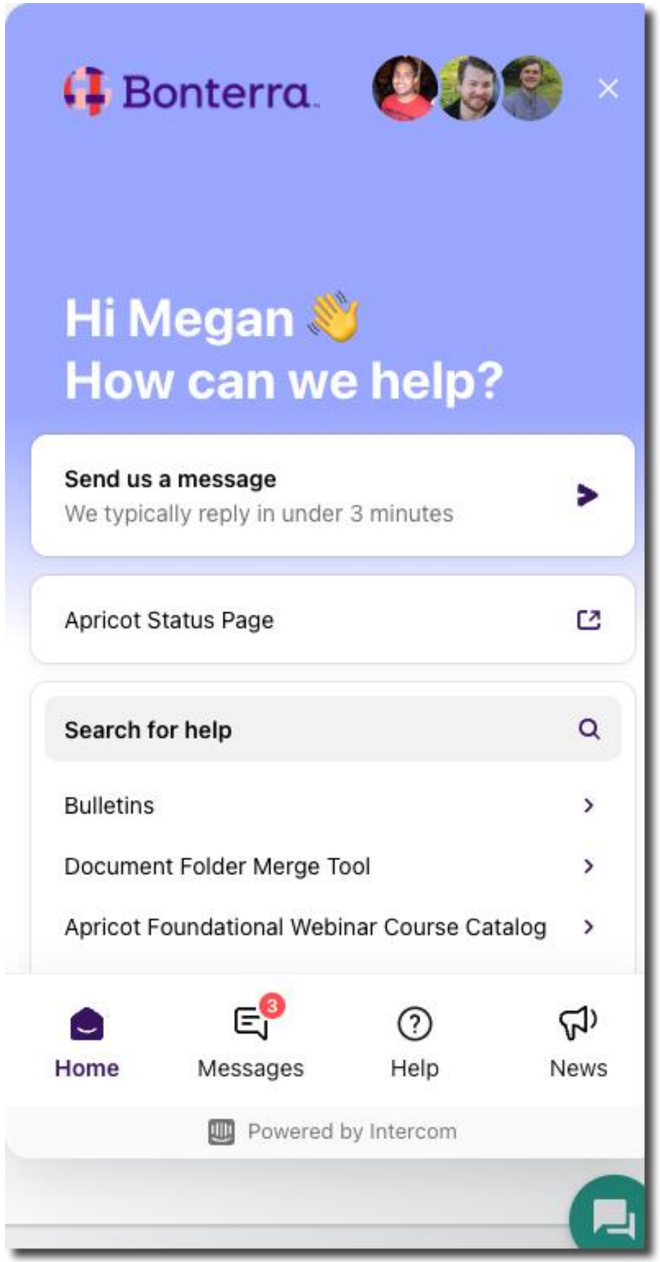
- Knowledge Base – How-To Articles (Search Chat or Visit Online)
- Bonterra Academy – Free Webinars & Recordings
- Foundations – Intensive, Multiday Courses to Cover Admin Basics
- Admin Labs – 2 Hour Live Trainings on Specific Capabilities
- Private Training – 1:1 Sessions with Training Expert in Your 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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