

Keeping Your Data Organized & Secure: Apricot Program Assignment Options

Welcome, we will start shortly!



Meet Your Trainer

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Learning Objective

This training will cover:

- How to control the way your data is organized into Programs.
- The importance of Program Assignment for data security.
- Best practices to updating assignments with existing data.

Our goal for this session is to help you feel confident setting up and managing Program Assignment to organize and control access to your data.

Agenda

Programs Refersher

Program Assignment Options

Adjusting Program Assignment

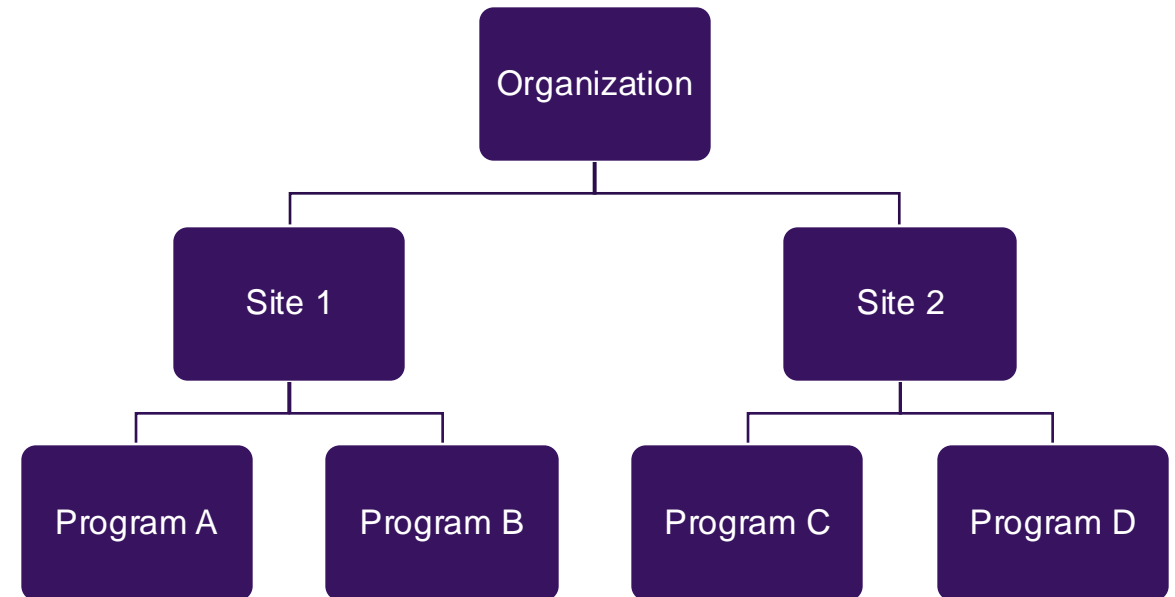
Reminders & Tips

Programs Refresher

Programs in Apricot

Programs Are:

1. System for **organizing** your data: Every record lives in at least one Program.
2. Method of **controlling security**: Users can only see data for the Programs they are assigned.
3. Opportunity to **streamline** user experience: Admins customize what is available by Program.



Programs Are Not:

1. Best practice for tracking **Program Enrollment**: Use a Tier 2 form to see history.



Programs in Apricot: Organization

How do you want to arrange your data?

- Active vs. Alumni
- Geographic locations
- Different departments
- Program phases

Example Nonprofit	Organization Offerings	Apricot Programs
New Hope	Financial Literacy, Job Placement & Retention	<ul style="list-style-type: none">• New Hope Clients• New Hope Alumni
Daily Bread	Food Pantry, Cooking Classes, Food Rescue	<ul style="list-style-type: none">• DB Brooklyn• DB Queens
Teach a Man to Fish	ESL, GED, Vocational Classes, Tutoring, Job Search and Retention, Apricot.	<ul style="list-style-type: none">• Adult Education• Workforce Development

Programs in Apricot: Security

- Data protection at various levels
- Each User can have unique access

Sites & Programs

Role Based Permissions

Named Users

Caseloads

Secure Fields

Programs in Apricot: Streamlining

Focus user attention on just the items they need to manage their day to day:

- Forms
- Records
- Bulletins
- Reports

The image shows a side-by-side comparison of the Apricot CORE user interface for two different programs. The left panel is for 'Program College Prep' and the right panel is for 'Program Empowering Families'. Both panels show a user profile for 'Aaron Anderson' with an 'Edit' button. The left panel has a sidebar menu with 'Search Records' and 'Participant Profile' highlighted. The right panel has a sidebar menu with 'Search Records', 'Participant Profile', and 'Household Profile' highlighted. The main content area of both panels shows 'All Documents' with an 'Expand Multiline' checkbox and a list of records: 'Program Enrollment and Exit (0 records)', 'Individualized Service (0 records)', 'Counseling Appointment (0 records)', and 'Positive Parenting Assessment (0 records)'. The right panel also shows 'Program Enrollment and Exit (0 records)', 'Individualized Service (0 records)', 'Counseling Appointment (0 records)', and 'Positive Parenting Assessment (0 records)'. The 'VS' label is placed between the two panels, and orange boxes highlight the differences in the sidebar menu and the main content area.

Program Assignment Options

Program Assignment Options

- Setting at the form level
- Can be different for each form

Options:

1. User selects program assignment
2. Assign records to form's associated programs
3. Assign records to user's associated programs

Form Properties (Tier 1)

Form Name
Participant

Description

Settings

- Hide from Navigation Menu
- Allow Search by Linked Forms
- Allow Copies
- Enable In Apricot Results Reporting
- Enable Form Logic

Record Name Field
Name

Quick View Fields

- Name
- Date of Birth
- Gender Identity
- Marital Status
- Employment Status

Searchable Fields

- Name
- Date of Birth
- Gender Identity
- Assigned Programs

History

First published by: [Apricot Subsystem](#)
Last published by: [Annie Novacek](#)

Apply

Program Assignment Type

- Assign records to user's active program
- User selects program assignment
- Assign records to form's associated programs
- Assign records to user's active programs

Program Assignment Options: Manual

1. User selects program assignment

- Triggers Program Assignment pop up at record save
- Allows for selecting one Program, several or all
- Recommended when forms & users are active in most Programs, but records need to be organized

Assign Programs [Close]

Available Programs [Add All >>]

- Health & Human Services
- Housing Program
- Intake
- Justice / Reentry
- Workforce Development
- Youth Services

Assigned Programs [Remove All <<]

- Adult Case Management

[Add >]

[< Remove]

Use the Add and Remove buttons above to update program assignment

You must save the record for the access changes to be applied

[Apply] [Cancel]

Program Assignment Options: Automatic

2. Assign records to form's associated programs

- Automatically assigns to all Programs with access to that form
- Ideal for forms limited to specific Program(s)

Form Permissions Search by Role...

Name ↓	Records							Forms
	View	Search	Create	Edit	Archive	Caseloads	View Secure Fields	Edit
Admin Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bottom Text's Role	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case Management (Caseloads On)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Donor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Event Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program A Case Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program B Case Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
This Guy's Role	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
This Guy's Second Role	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CANCEL SAVE

Program Assignment Options: Automatic

3. Assign records to user's associated programs

- Automatically assigns to all Programs the user can access
- Best for users with access to just the Program(s) they work in

The screenshot displays the 'Permissions' configuration page. At the top, there are 'Undo' and 'Redo' buttons and a search bar labeled 'Search by Name...'. Below this is a horizontal menu with tabs for 'FORMS', 'REPORTS', 'AGGREGATE REPORTS', 'BULLETINS', 'REFERRALS', and 'SHARED FILES'. The 'FORMS' tab is selected. The main content area is divided into two sections: 'RECORDS' and 'FORMS'. The 'RECORDS' section contains several toggle switches for permissions: 'VIEW' (checked), 'SEARCH' (checked), 'CREATE' (checked), 'EDIT' (checked), 'ARCHIVE' (unchecked), 'IGNORE PROGRAM ASSIGNMENT' (unchecked), 'CASELOAD' (unchecked), 'VIEW SECURE FIELDS' (unchecked), and 'EDIT' (unchecked). The 'FORMS' section is currently empty.

Adjusting Program Assignment

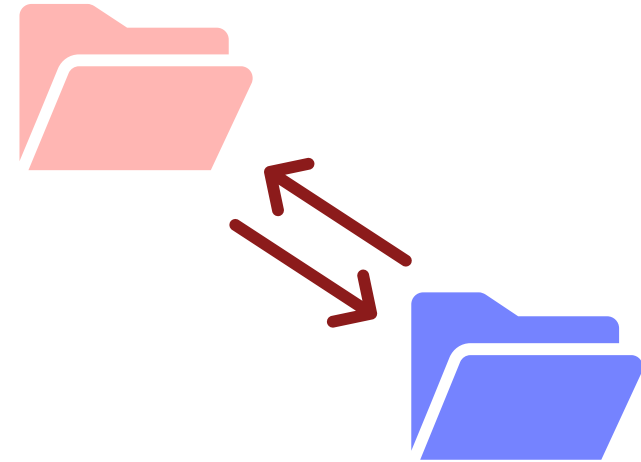
Adjusting Program Assignment

Options:

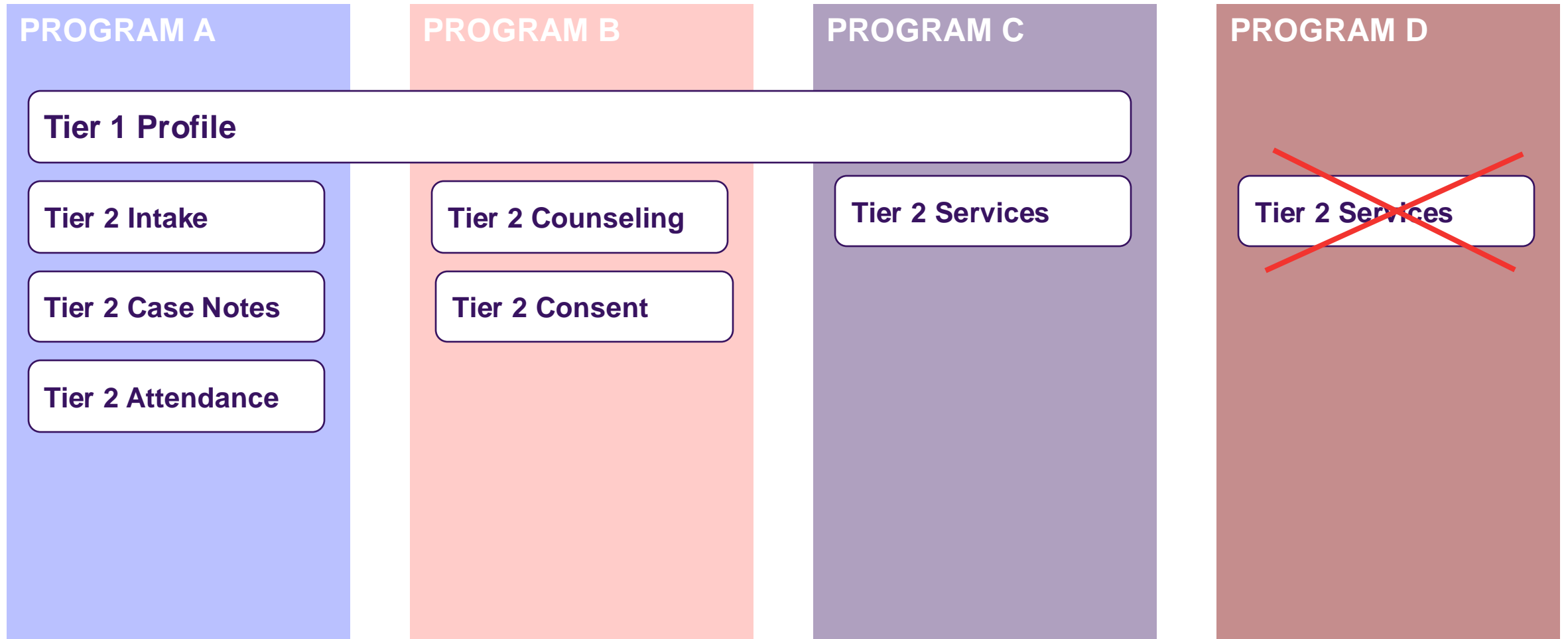
1. Individually at the Record Level
2. Bulk Assignment within Search Records
3. Program Assignment via Import
4. *Ignore Program Assignment Checkbox*

Considerations:

- All Records must be assigned to at least one Program.
- Be mindful of assignment for related Tier 1 and Tier 2 records.



Program Assignment for Related Records



At the Record Level

- Available to edit for each Record
- Program Access button on the right
- Recommended for one-offs or a few records

The screenshot displays the Apricot 360 user interface. At the top, the user is logged in as Annie Novacek, an Administrator. The main navigation menu on the left includes Dashboard, Inventory, Search Record, Hidden Record, and My Apricot Tools. The current page is titled 'Participant' and shows an 'Assign Programs' modal window. This modal is divided into three main sections: 'Add Case Manager' with a dropdown menu and an 'Add Case Manager' button; 'Assigned Case Managers' (currently empty); and 'Available Programs' and 'Assigned Programs' lists. The 'Available Programs' list includes 'Health & Human Services', 'Housing Program', 'Intake', and 'Justice / Reentry', with a red warning message: '2 Tier 2 record(s) will also be removed from this program'. The 'Assigned Programs' list currently contains 'Workforce Development' and 'Youth Services'. Between these lists are 'Add >' and '< Remove' buttons. At the bottom of the modal, there is a note: 'Use the Add and Remove buttons above to update program assignment' and a warning: 'You must save the record for the access changes to be applied', followed by 'Apply' and 'Cancel' buttons. On the right side of the interface, there is a 'COLLAPSE ALL' button and several utility panels: 'Record Options' (Save Record, Print Mode, Archive Record, View History, New Participant, View Folder, Go To Search), 'Attached Enrollments' (Attach to Enrollment), 'Assigned Programs' (Adult Case Management, Youth Services, Workforce Development, Program Access), 'Record Save Checklist' (Required Field Checks, Valid Date, Field Validation Checks), and 'Form Logic Rules'.

Bulk Assignment

- Use Search Records to filter down specific set of data and reassign in bulk
- Recommended for batches with the same Program Assignment needs
- Can apply to Tier 1 or Tier 2 records
- Admins can revert if done in error

Assign Programs

This will affect ALL records that match the current search criteria. Are you sure you want to continue?

Form
Participant ▾

Select Case Manager
▾ Add Case Manager Remove Case Manager

Assigned Case Managers ⓘ

Removed Case Managers ⓘ

Available Programs Add All >>

Housing Program
Intake
Justice / Reentry

Assigned Programs << Remove All

Adult Case Management
Health & Human Services
Workforce Development
Youth Services

Add >
< Remove

Use the Add and Remove buttons above to update program assignment

Apply Cancel

Data Import

- Another bulk option, but best when you need to apply different Program Assignments to a batch of records
- List the Program ID in the spreadsheet for each record

Assigned Programs (field_2089)

Any number of the following Program Ids separated by a '|' character

Id - Program Name

1174 - Adult Case Management

2491 - Health & Human Services

2493 - Housing Program

2559 - Intake

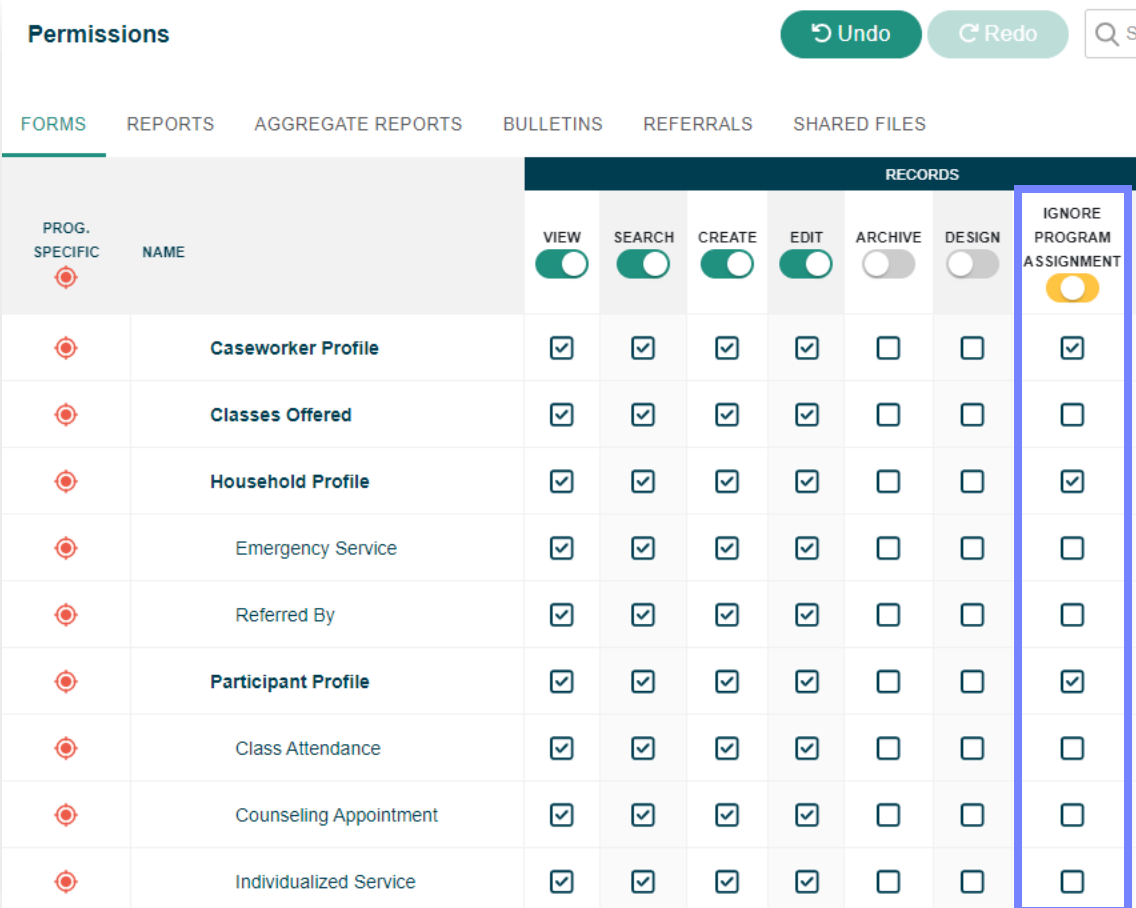
2408 - Justice / Reentry

2495 - Workforce Development

1190 - Youth Services

Ignore Program Assignment

- Option at the Role level to overlook Program Assignment so users can see everything.
- Allows for opening access to data without moving any records across Programs.
- Only recommended when you don't need to restrict access.



The screenshot shows a 'Permissions' interface with a table of records. The table has columns for 'PROG. SPECIFIC', 'NAME', 'VIEW', 'SEARCH', 'CREATE', 'EDIT', 'ARCHIVE', 'DESIGN', and 'IGNORE PROGRAM ASSIGNMENT'. The 'IGNORE PROGRAM ASSIGNMENT' column is highlighted with a blue border. The 'VIEW', 'SEARCH', 'CREATE', and 'EDIT' columns have green toggle switches, while 'ARCHIVE' and 'DESIGN' have grey toggle switches. The 'IGNORE PROGRAM ASSIGNMENT' column has a yellow toggle switch.

PROG. SPECIFIC	NAME	VIEW	SEARCH	CREATE	EDIT	ARCHIVE	DESIGN	IGNORE PROGRAM ASSIGNMENT
<input checked="" type="checkbox"/>	Caseworker Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Classes Offered	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Household Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Emergency Service	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Referred By	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Participant Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Class Attendance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Counseling Appointment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Individualized Service	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Reminders & Tips

Reminders & Tips

1. Don't rely just on Program Assignment for Enrollment data.
2. Use a report to check Program Assignment while making changes.
3. Be careful with related Tier 1 and Tier 2 records; avoid missing Programs.
4. Move data before deactivating a Program if you still need to access.
5. Caseloads is a more granular level of record assignment.

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)

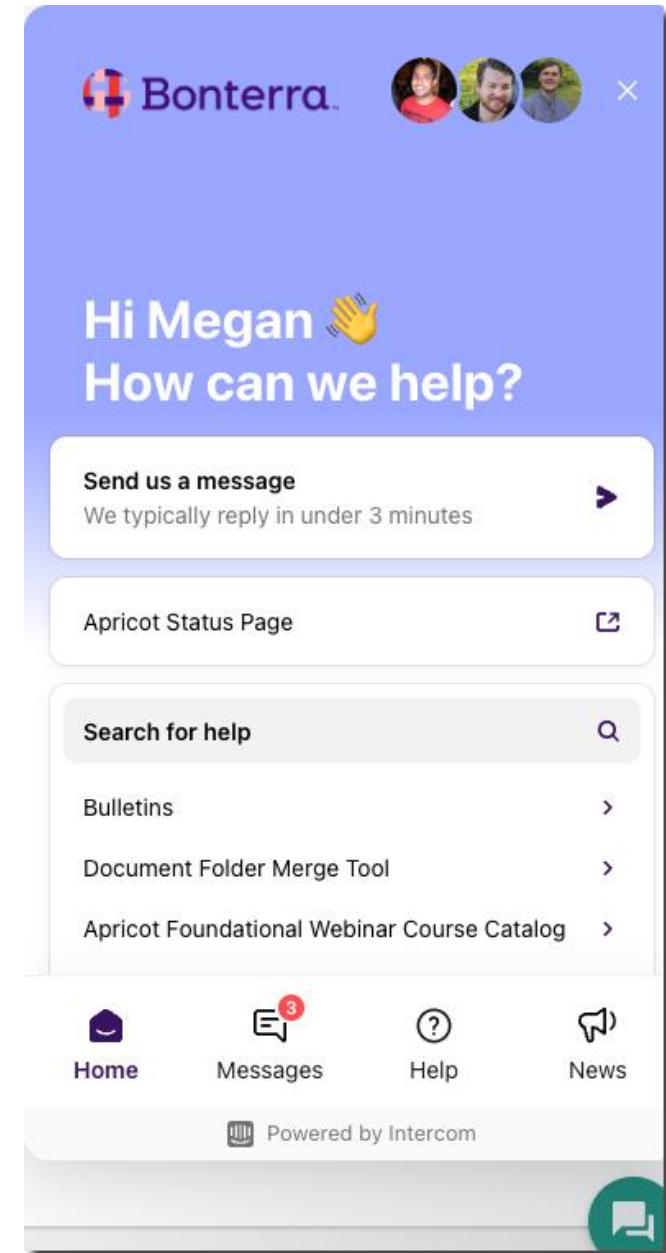


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Q & A

- 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!



Thank you for attending!

We hope to see you
in future trainings.