

# Options for Tracking Attendance

How to Choose for your organization

Welcome, we will start shortly!



# Meet Your Trainer

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# Learning Objective

This training will cover:

- Different methods for tracking attendance.
- Benefits and use cases of each approach.

By the end of this session, our goal is to help you compare the ways you can track attendance in Apricot to choose the one that best meets your organization's needs.

# Agenda

Overview

Attendance Tracker

Batch Record Creation

Option Comparison

# Attendance Overview

# Attendance Overview

Ability to track participant activity in bulk for different types of sessions.



**Attendance Tracker**



**Batch Record Creation**

## Considerations:

- Does your organization offer classes, workshops, groups or events?
- Are the attendees for these activities consistent or variable over time?
- Are you tracking an anonymous count or attendance by individual?
- Do you need to know just who shows up or everyone's attendance status?

# Attendance Examples

Classes

Workshops

Group  
Therapy

Events

Meals

Resource  
Pickups

Volunteer  
Activities

Info  
Sessions

# Attendance Tracker aka Classes & Terms



# Attendance Tracker

- Newer feature released in 2021.
- Recommended for **recurring classes** with a **consistent roster** of students.
- Can log same data or customize by person.
- Use with **up to 2 Attendee Tier 1 forms**.
- Can create **Classes** with multiple **Terms** and **Sessions** for logging daily attendance.
- Includes **completion criteria** to track risks.
- Add **custom fields** for notes & other data.
- Data syncs **overnight** for next day reporting.

The screenshot displays the 'Attendance' interface. At the top right, there is a button labeled 'Enroll Participant(s)'. Below this, there are tabs for 'MORNING SESSION' and 'AFTERNOON SESSION'. A navigation bar shows 'View Today', navigation arrows, and the month 'Jun 2021'. A search bar is on the right with a 'Show Unenrolled' checkbox. Below the navigation, there are filters for 'First Name (A-Z)' and a calendar view for the month of June, with days SUN 6, MON 7, TUE 8, WED 9, and THU 10. The main area is a table with columns for each day. The table lists participants with their names and birth dates, and their attendance status for each day. The participants listed are Jordan Ramirez (1987-09-08), Henry James (1977-12-15), Heather Lightfoot (1999-03-06), Bob Jones (1961-06-13), and Alicia Henry (1965-08-19). Each row has a green checkmark for the 7th, a red X for the 8th, and an edit icon for the 9th.

	SUN 6	MON 7	TUE 8	WED 9	THU 10
<b>Jordan Ramirez</b> 1987-09-08		✓	✗		
<b>Henry James</b> 1977-12-15		✓	✗		
<b>Heather Lightfoot</b> 1999-03-06		✓	✗		
<b>Bob Jones</b> 1961-06-13		✓	✗		
<b>Alicia Henry</b> 1965-08-19		✓	✗		

# Setting Up Attendance Tracker

**Step 1:** Configure Classes & Terms, selecting up to two Tier 1 Participant / Attendee Forms.

**Step 2:** Create new Class and add Terms, with attendance dates and completion criteria.

**Step 3:** Set up daily Session(s) and custom Attendance Notes Fields if relevant.

**Step 4:** Enroll Attendees and start logging attendance!

**Term Dates**

RECURRING SPECIFIC DATE(S)

**OCCURS** Monthly | v **EVERY** 1 month(s)

**ON** Second | v - Saturday | v

**START DATE** 06/05/2021 ✕ - **END DATE** 09/04/2021 ✕ **START TIME** 12:00 pm v - **END TIME** 1:30 pm v

Select Dates Off (e.g. holidays, breaks)

< June | v 2021 | v >

SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

7/3/2021 ✕

# Batch Record Creation

# Batch Record Creation

- Ideal for tracking **one-time events** or recurring sessions with **different attendees**.
- Often used when only need to capture who showed up (as opposed to Present & Absent).
- Log the **same attendance data** for everyone selected (not customizable by person).
- Use with **unlimited Tier 1 Attendee** forms.
- Setting can be enabled for any Tier 2.

The screenshot displays the 'Workshop Attendances' interface. On the left, there is a form for creating an attendance record. The form includes a date picker for the workshop date, radio buttons for selecting a workshop name (Parenting 101, Interview Skills, Resume Writing), and a dropdown for attendance status. A 'System Fields' section is also visible. On the right, a 'Participant Profile Search' modal is open, showing a table of 54 available records. The table has columns for Participant Name, Date Of Birth, Client Status, Client Email, and an Add button. The records listed include Alicia Henry, Alonzo LaBarca, Alonzo LaBatsille, Alvy Singer, Andrew Jones, April Billingslea, Asher Billingslea, Ashton Carter, Austin Hill, and Beth Crane.

Workshop Attendances COLLAPSE ALL

Attendance Sheet ▾

**\*Workshop Date**  
MM/DD/YYYY 📅

**Workshop Name**

Parenting 101  
 Interview Skills  
 Resume Writing

**Attendance**  
--Please Select-- ▾

System Fields ▶

**Participant Profile Search** ✕

Select All Clear History

--Add Search Field -- ▾ Browse All

Showing 1 - 10 of 54 available Participant Profile records More Columns...

Participant Name ▾	Date Of Birth ▾	Client Status ▾	Client Email ▾	Add
Alicia Henry	08/19/1965	Active		+
Alonzo LaBarca	04/03/1998	Active		+
Alonzo LaBatsille	03/04/1998	Inactive		+
Alvy Singer	10/01/1978	Active	alvy.singer@gmail.com	+
Andrew Jones	05/16/1985	Active		+
April Billingslea	04/15/1982	Active	aprilb@yahoo.com	+
Asher Billingslea	06/09/1984	Active	abillingslea@gmail.com	+
Ashton Carter	06/12/2003	Active		+
Austin Hill	11/18/1997	Active		+
Beth Crane	06/04/1974	Active	b.crane@gmail.com	+

# Setting Up Batch Record Creation

**Step 1:** Select Attendee Tier 1.

**Step 2:** Create Attendance Tier 2.

**Step 3:** Enable Batch Record for Tier 2.

**Step 4:** Start logging attendance.

Workshop Attendance

Attendance Sheet ▾

**Workshop Date \***  
MM/DD/YYYY 📅

**Workshop Name**

Parenting 101  
 Interview Skills  
 Resume Writing

**Attendance**  
--Please Select-- ▾

System Fields ▶

**Form Properties (Participant Profile Tier 2)**

Form Name  
Workshop Attendance

Description

Settings

Allow Batch Record creation?  
 Allow Copies  
 Record Limit  
 Hide from Document Folder  
 Enable In Apricot Results Reporting  
 Enable Form Logic

Program Assignment Type  
Assign records to form's associated ▾

Record Name Field  
Workshop Date ▾

Blueprint Form Tag  
--- Please Select --- ▾

Quick View Fields

- Workshop Date

Searchable Fields

- Workshop Date
- Workshop Name

# Favorite Lists

- Preloaded list of possible attendees
- Save time instead of manually selecting each
- Recommended for groups of related people

**Step 1:** Select Tier 1 under Search Records.

**Step 2:** Click the dropdown under Favorite Lists.

**Step 3:** Select [Create New] & set list name.

**Step 4:** Use search to find Participants.

**Step 5:** Click star to add to list.

The screenshot displays the 'Participant Profile' search interface. At the top, there is a search bar with a dropdown menu set to '-- Add Search Field --' and a 'Browse All' button. Below the search bar, it indicates 'Showing 1 - 20 of 54 available Participant Profile records' and a 'More Columns...' link. The main content is a table with the following columns: Participant Name, Date Of Birth, Client Status, Client Email, Gender, Employed, and Add. The table lists 20 participants, with stars indicating they are added to favorite lists. On the right side, there is a sidebar with an 'EXPAND ALL' button. The sidebar contains several sections: 'Search Actions' with buttons for 'New Participant Profile', 'Clear Search History', 'Program Access', 'Merge Folders', 'Create Referral', and 'Show Enrollment Actions'; 'Create Batch Records' with buttons for 'Individualized...', 'Workshop Attendance', and 'Class Attendance'; and 'Favorite Lists' with a dropdown menu set to 'Group Therapy' and a 'Favorite Details' section listing participants with 'X' marks next to their names.

Participant Name	Date Of Birth	Client Status	Client Email	Gender	Employed	Add
Alicia Henry	08/19/1965	Active		Female	Yes	★
Alonzo LaBarca	04/03/1998	Active		Male		★
Alonzo LaBatsille	03/04/1998	Inactive		Male	No	★
Alvy Singer	10/01/1978	Active	alvy.singer@gmail.com	Male	Yes	★
Andrew Jones	05/16/1985	Active		Male	Yes	★
April Billingslea	04/15/1982	Active	aprilb@yahoo.com	Female	Yes	★
Asher Billingslea	06/09/1984	Active	abillingslea@gmail.com	Male	Yes	★
Ashton Carter	06/12/2003	Active		Male	No	★
Austin Hill	11/18/1997	Active		Male	Yes	★
Beth Crane	06/04/1974	Active	b.crane@gmail.com	Female	Yes	★
Cherise Alexander	02/28/1969	Active		Female	Yes	★
Deandre Reynolds	12/18/1975	Active		Male	Yes	★
Ellery Thompson	11/05/1985	Active	ethompson@yahoo.com	Male	Yes	★
Heather Carter	04/18/2003	Inactive		Female	No	★

# Comparison

# Comparison

	<b>Attendance Tracker</b>	<b>Batch Records</b>
<b>Feature Availability</b>	Pro (Core) & Enterprise (360)	All Versions of Apricot
<b>Class / Event Type</b>	Recurring with Set Roster	Nonrecurring and/or Varying Attendees
<b>Attendee Types</b>	Up to 2 Tier 1 Forms	Unlimited Tier 1 Forms
<b>Attendance Data</b>	Same for All with Ability to Customize by Individual	Same Data for All
<b>Reporting</b>	Overnight Sync	Real Time



# Which Solution to Choose



## Attendance Tracker

- Spring Semester Parenting Class
- Weekly Recurring Group Therapy
- Court Mandated Anger Management



## Batch Record Creation

- Popup Health Resource Fair
- Weekly Drop In Group Therapy Session
- Group Volunteer Shift
- Daily Free Lunch

# 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)

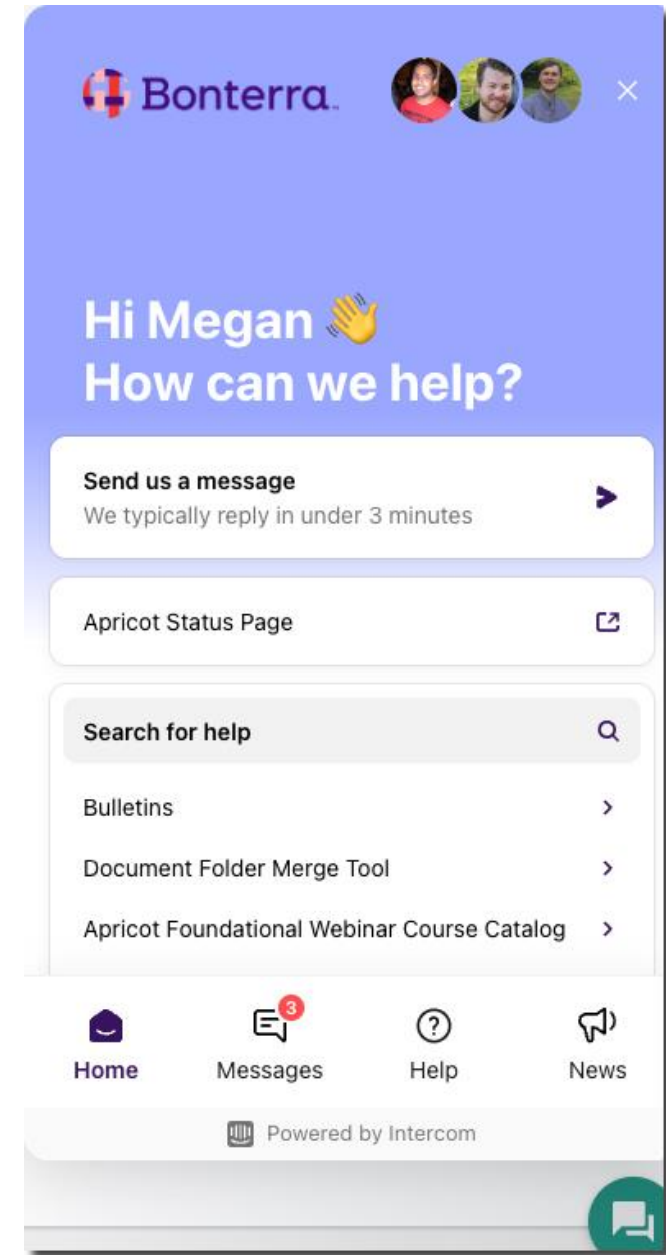


Build confidence & knowledge in  
our software!

# 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.