Options for Tracking Attendance

How to Choose for your organization

Welcome, we will start shortly!

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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

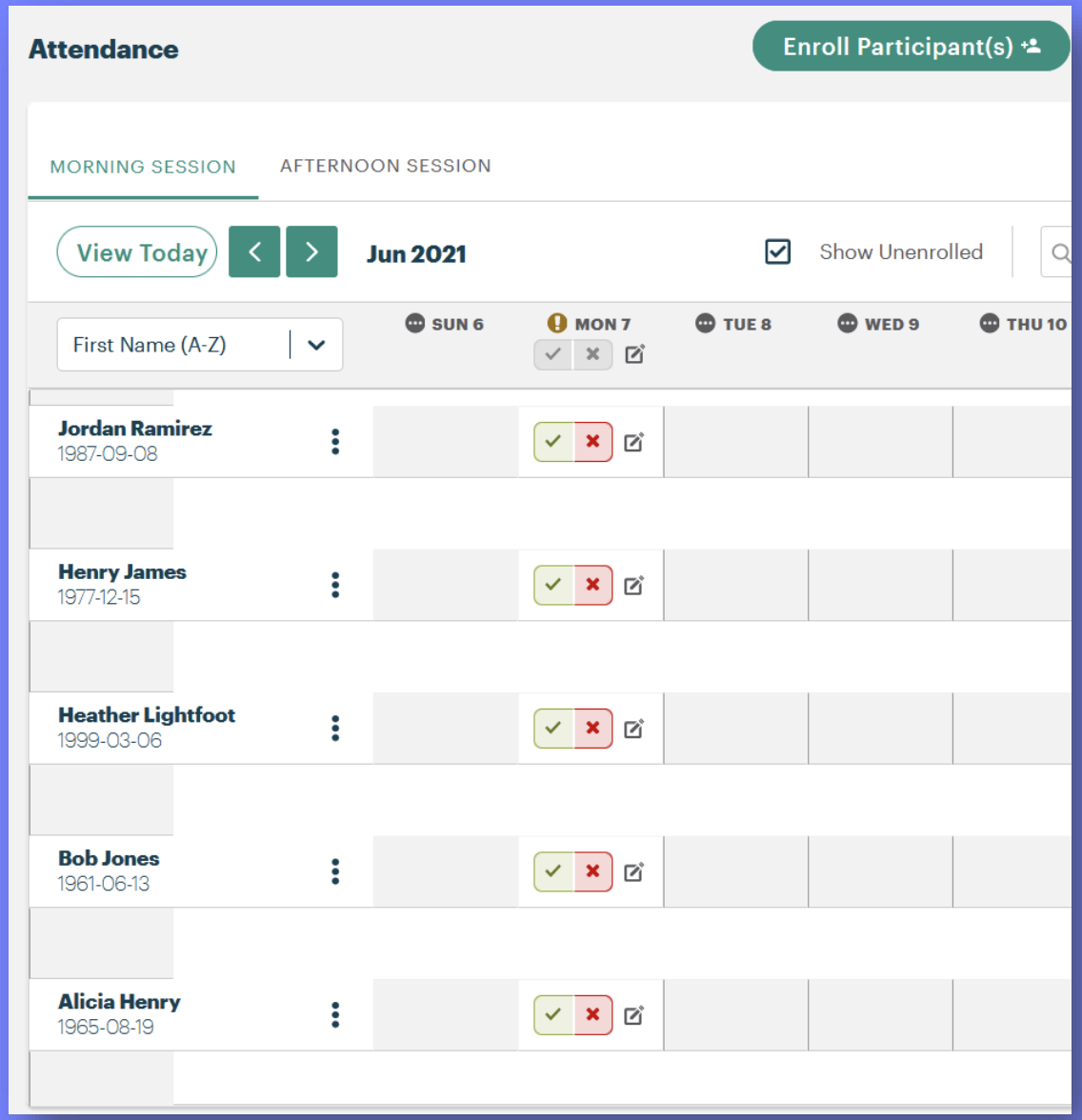
- Classes
- Workshops
- Group Therapy
- Events
- Meals
- Resource Pickups
- Volunteer Activities
- Info Sessions

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.



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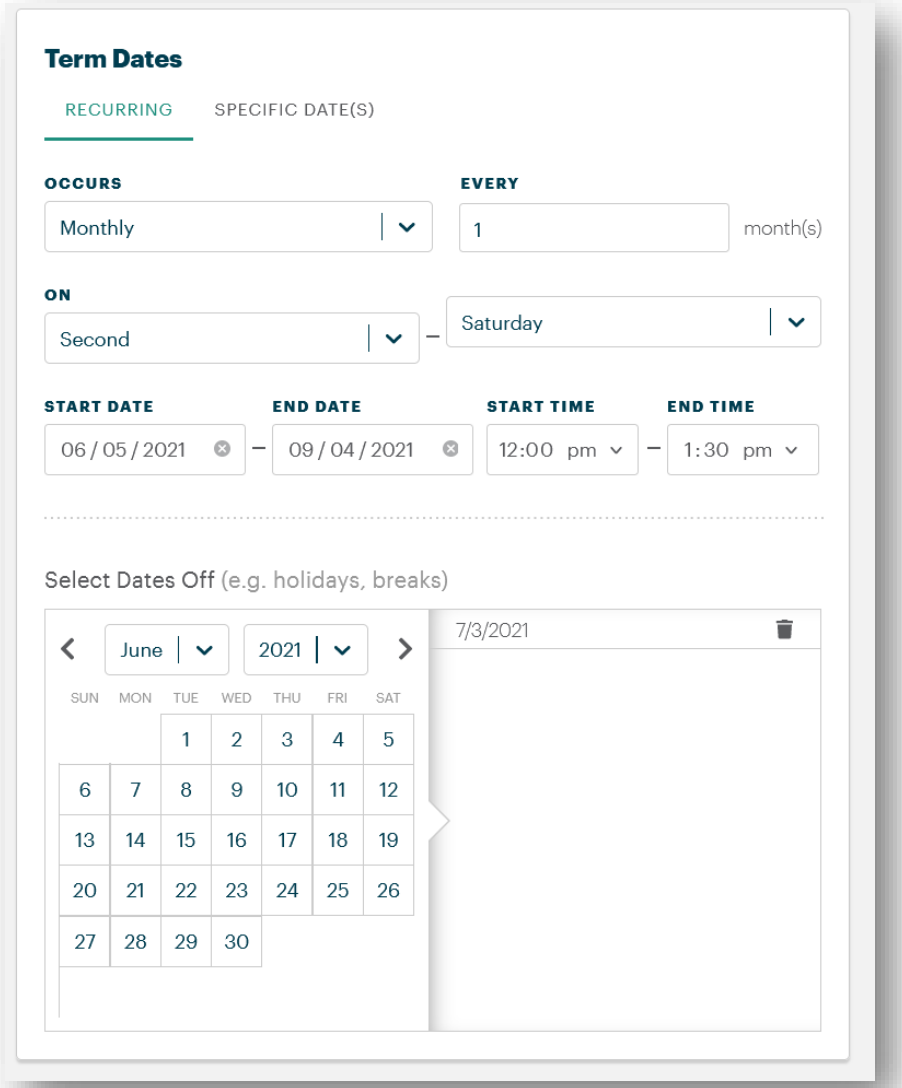
Setting Up Attendance Tracker

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!



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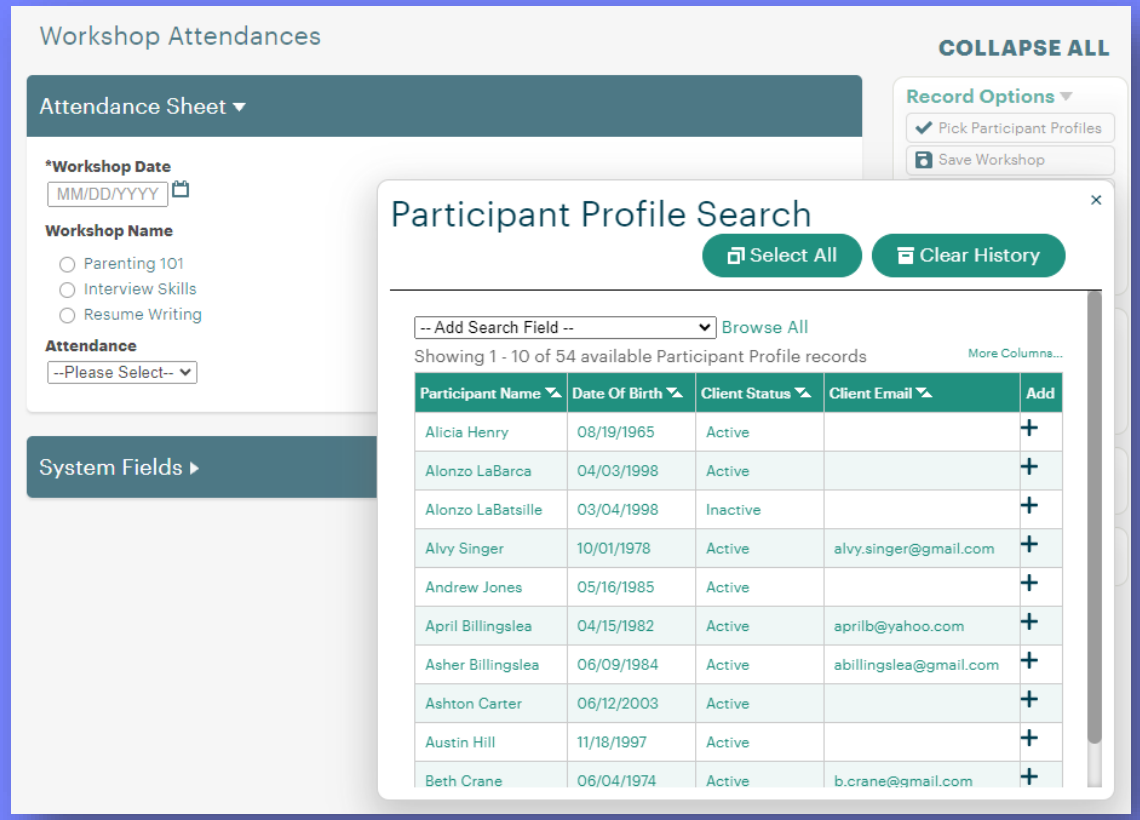
Batch Record Creation

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.



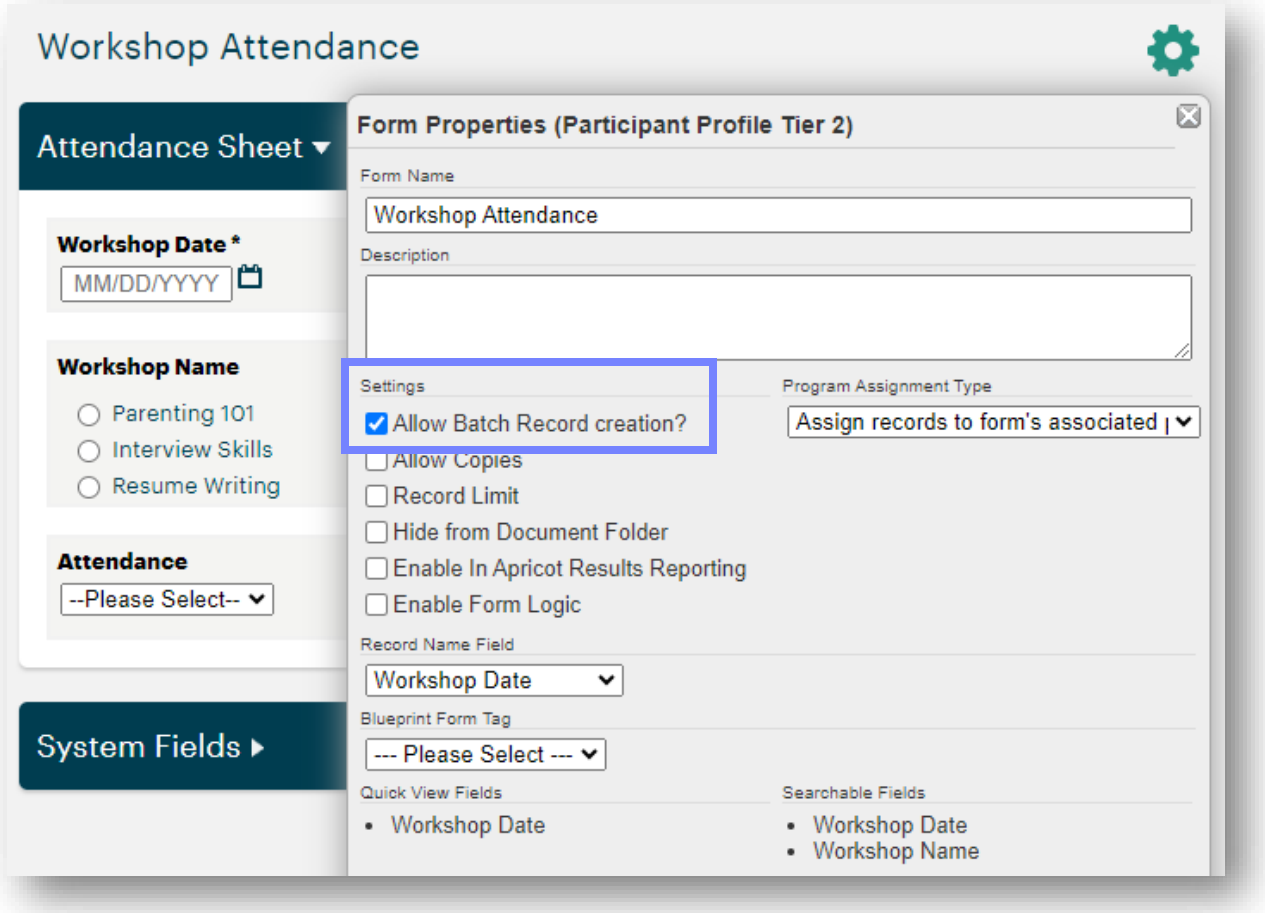
Setting Up Batch Record Creation

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.



Favorite Lists

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

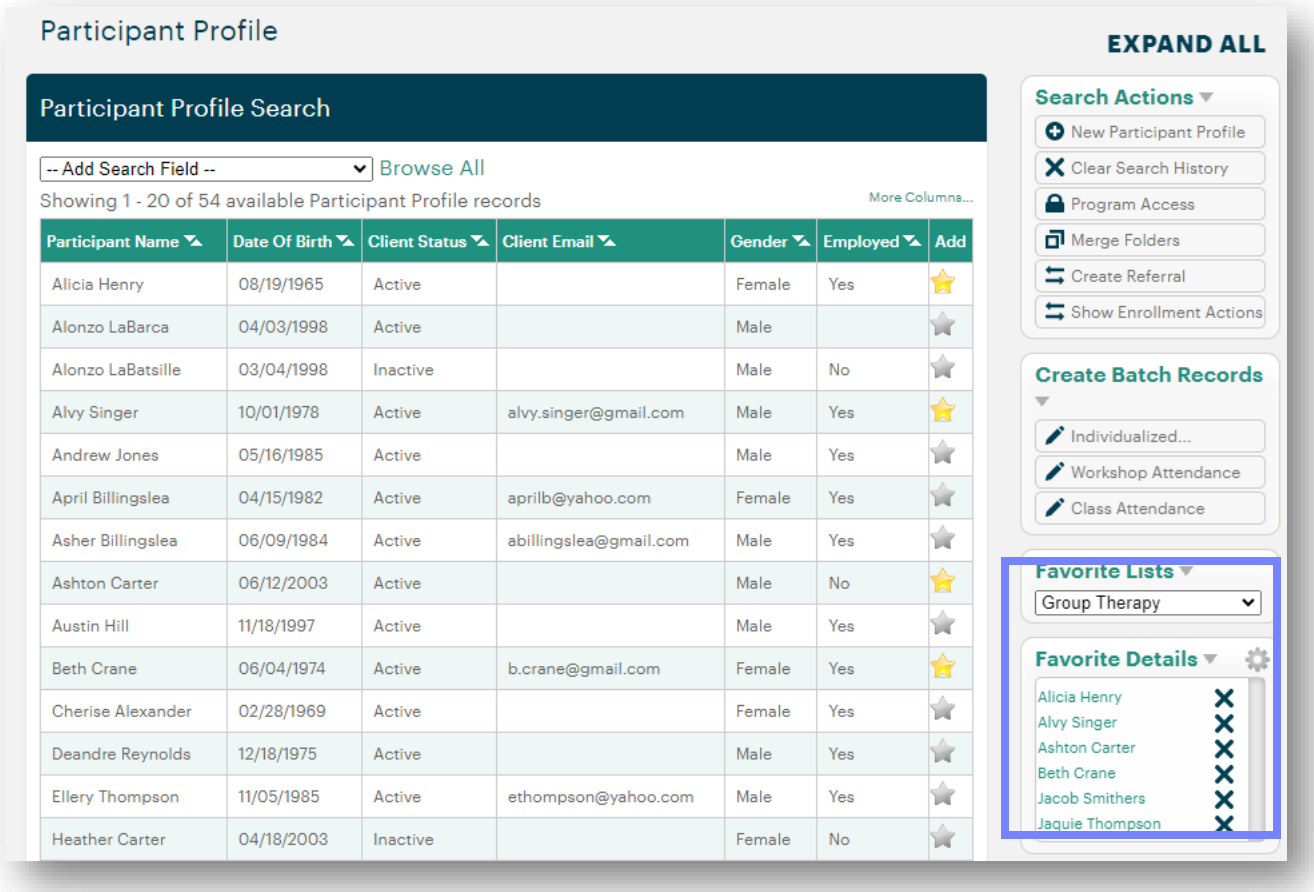
Step 1: Select Tier 1 under Search Records.

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.



Comparison

Comparison

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

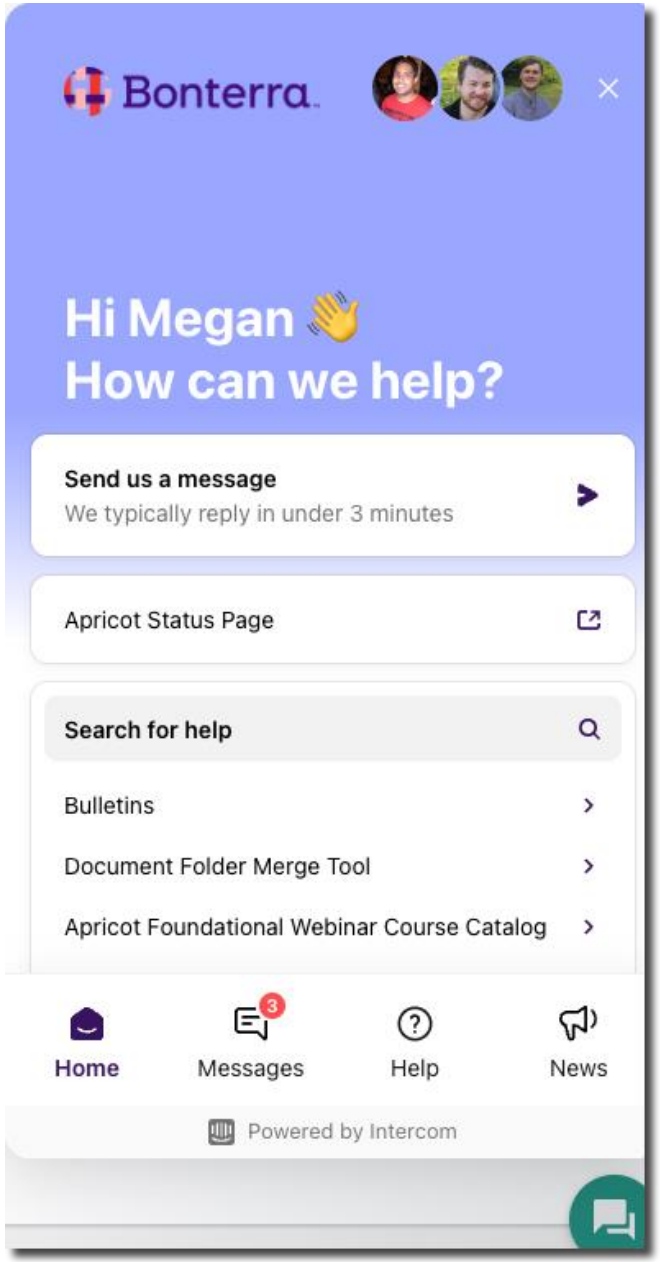
- Knowledge Base – How-To Articles (Search Chat or Visit Online)
- Bonterra Academy – Free Webinars & Recordings
- Foundations – Intensive, Multiday Courses to Cover Admin Basics
- Admin Labs – 2 Hour Live Trainings on Specific Capabilities
- Private Training – 1:1 Sessions with Training Expert in Your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



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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