

# How to Migrate to Role Based Permissions

Welcome, we will start shortly!

# Meet Your Trainer

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# Learning Objective

This training will cover:

- Role Based Permissions benefits & limitations.
- How to tell which version of Permissions you're using.
- Steps to migrate & take advantage of new features.

By the end of this session, our goal for you is to feel confident making the switch to new Role Based Permissions for managing your user access.

# Agenda

Overview

Benefits

Limitations

How to Migrate

# Overview

# Permissions

Settings to determine which Users can View, Create and Edit Records, Reports & more.

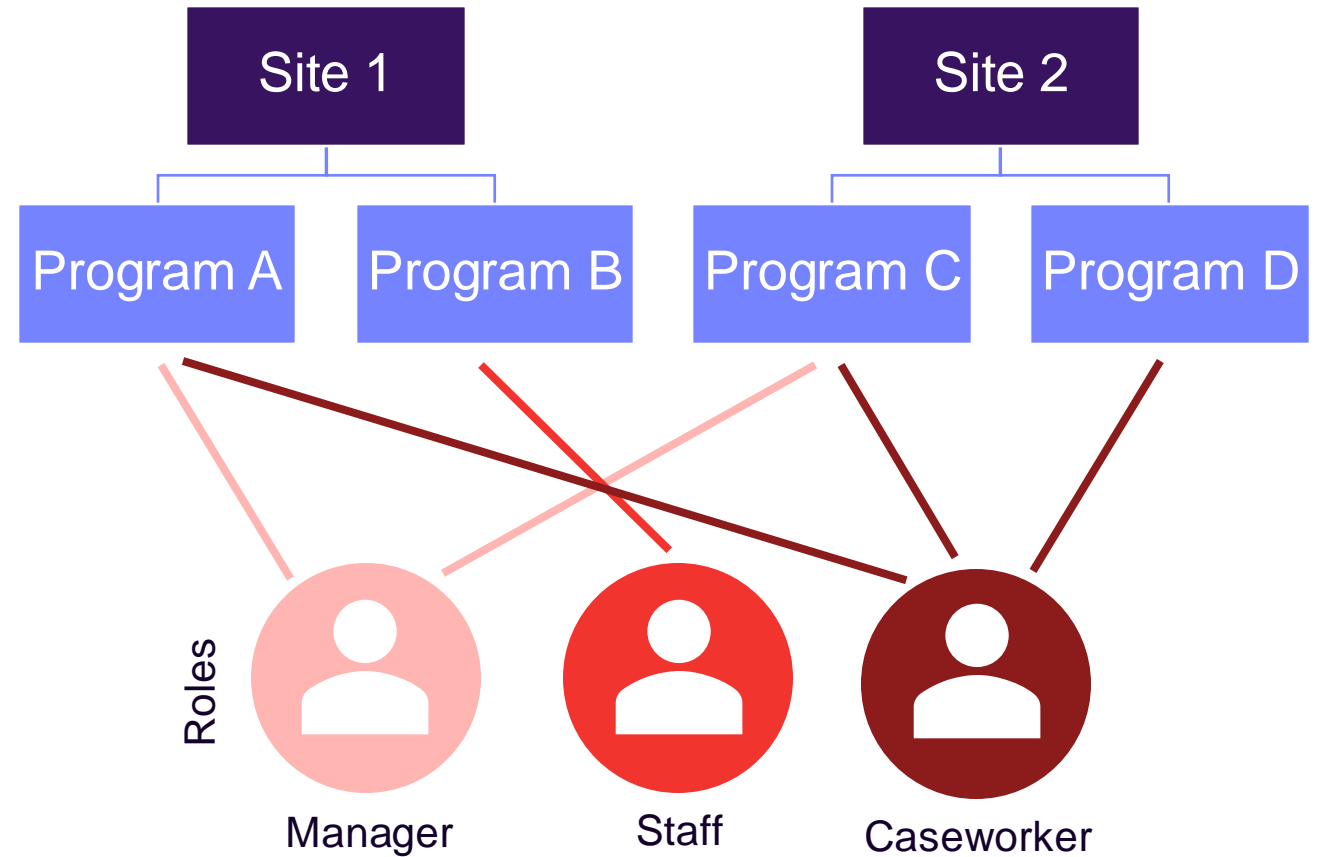
**Permissions** Undo Redo

FORMS | REPORTS | AGGREGATE REPORTS | BULLETINS | REFERRALS | SHARED FILES

		RECORDS							FORMS	
PROG. SPECIFIC	NAME	VIEW	SEARCH	CREATE	EDIT	ARCHIVE	IGNORE PROGRAM ASSIGNMENT	CASELOAD	VIEW SECURE FIELDS	EDIT
		<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"/>	<input type="checkbox"/>

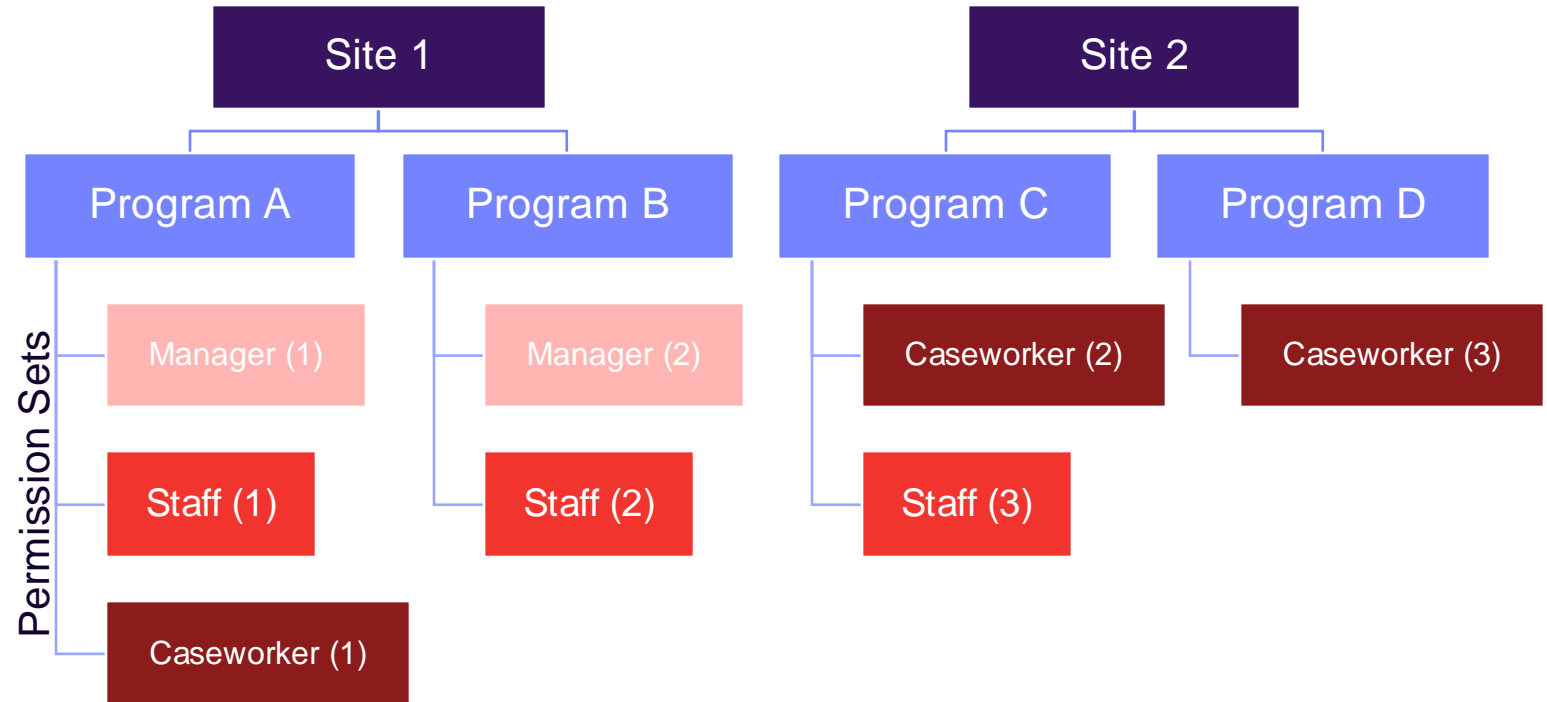
# Role Based Permissions

- New & improved version of permissions.
- Simplified, but with same level of control.
- Roles can apply to any User & Program.



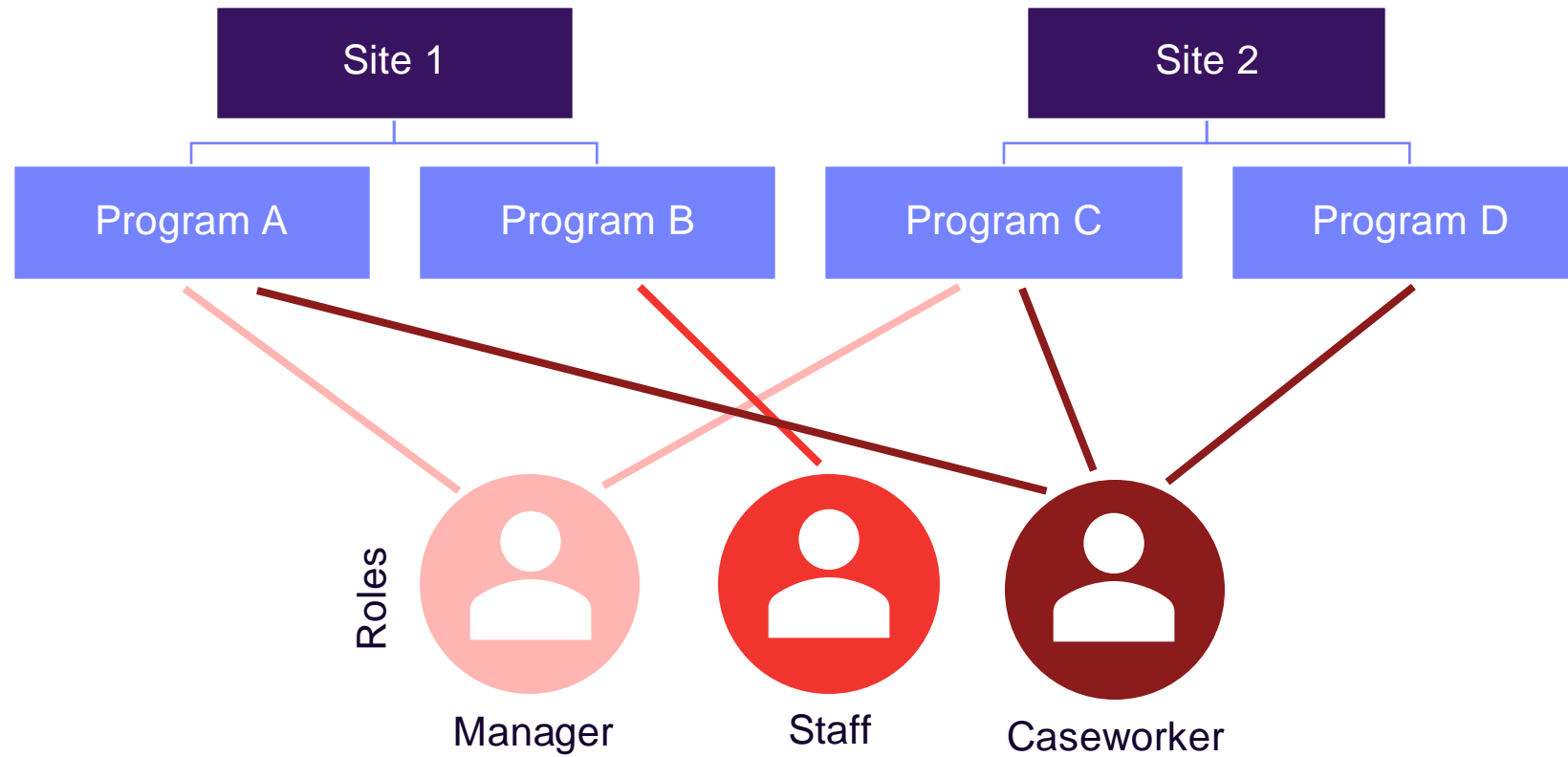
# Legacy Permissions

- More rigid permissions structure by Program.
- Permissions Sets created under each Program.
- Any updates must be made to each Permission Set.





# Comparison



## Role Based Permissions

# Which Version Do I Have?

Role Based Permissions

apricot 360

Back to Apricot

- Users
- Roles
- Caseload Manager
- Sites & Programs
- Secure Field Audits

Legacy Permissions

apricot 360

Back to Apricot

- Sites & Programs

## Users

Search...

All Programs

All Roles

Administrator: 100 allowed (91 left) Standard Users: 300 allowed (279 left) Guest Users: 4 total

New User

NAME	USERNAME	USER TYPE	INVITED
Maranda Admin	maranda.mdy@gmail.com	ADMINISTRATOR	
Test Guest	guest@test.com	GUEST	INVITED
This Guy	thisguy@righthere.com		
Test Invited	test@invited.com		INVITED
Case Loads	caseloads@socialsolutions.com		INVITED

MY APRICOT

ADMINISTRATOR

All Sites

Program All Programs

CHANGE



Maranda Moody  
Maranda Tests All T... (109356)

## Administrator

COLLAPSE ALL



### Switch to Role Based Permissions

The new and improved Role-Based Permissions (RBP) is now available for your organization to opt-in! With Role-Based Permissions, you gain access to a more intuitive permissions experience, as well as groundbreaking functionality like Caseloads and Site Administrators. Click here to begin your migration to this new experience!

LEARN MORE

GET STARTED

# Which Version Do I Have?

## Legacy Permissions

**Permissions** ▾

If a user has ANY permissions for a form, they must also have "View" permission for that form.  
 If a user cannot "View" a Tier 1 form, then they cannot "View" any of the associated Tier 2 forms either.  
 "Archive" at the Tier 1 level is only available for administrators, since it requires full permissions for all Tier 2 forms.

**Forms** Reports Bulletins Shared Files Referrals

Form	View Record	Search Record	Create Record	Edit Record	Archive Record	Ignore Program Assignment	Apply User RLA	Create/Edit Forms
Participant Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program Enrollment and Exit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Individualized Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Counseling Appointment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Positive Parenting Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workshop Attendance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Class Attendance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workforce Assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Role Based Permissions

**Permissions** Undo Redo

FORMS REPORTS AGGREGATE REPORTS BULLETINS REFERRALS SHARED FILES

PROG. SPECIFIC	NAME	RECORDS									FORMS
		VIEW	SEARCH	CREATE	EDIT	ARCHIVE	IGNORE PROGRAM ASSIGNMENT	CASELOAD	VIEW SECURE FIELDS	EDIT	
<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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Classes Offered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input 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 type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Referred By	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Class Attendance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

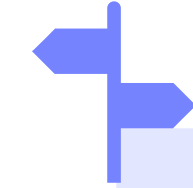
# Benefits

# Benefits of Role Based Permissions



## Easy to Manage

- Everything permissions in one place.
- Only need to edit Role once to apply to any Program.



## Granular Security

- Customizations available at Program level.
- Advanced Access for Admin-like options.



## New Features

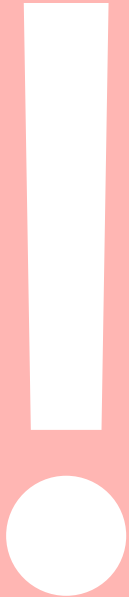
- Site Admins
- Caseloads
- Secure Fields
- More to come

# Limitations

# Limitations of Role Based Permissions

## Role Based Permissions Does Not Support:

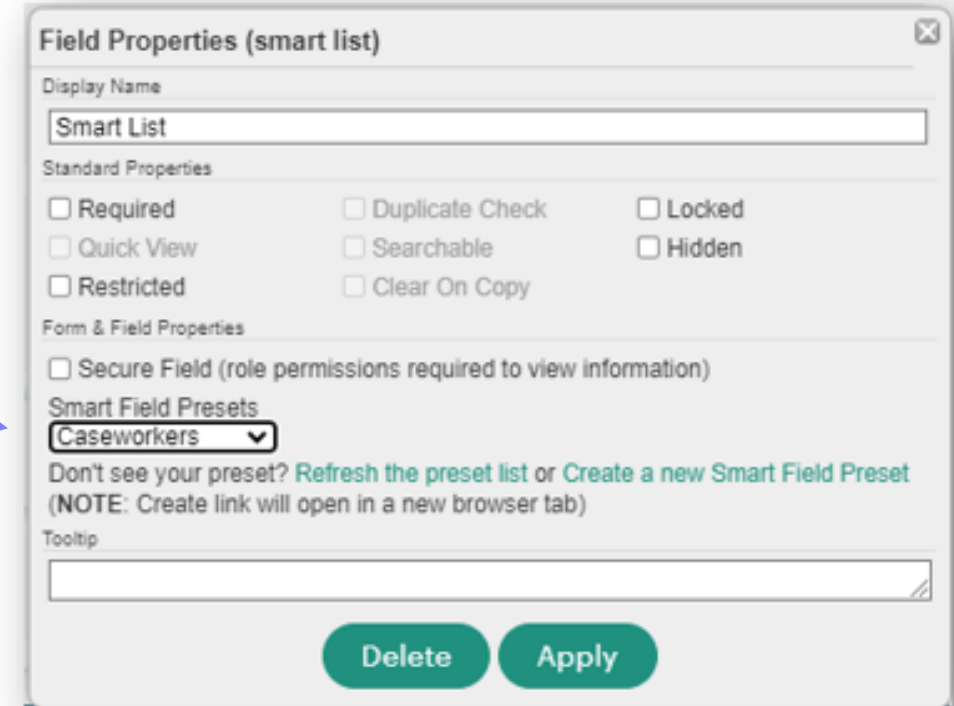
- Dynamic fields connected to Users.
- Custom fields in User profile.
- User Record Level Access (Tier 2 level).
- No option to switch back.



# Limitations of Role Based Permissions

## Role Based Permissions Does Not Support:

- Dynamic fields connected to Users.
- Custom fields in User profile.
- **Consider Tier 1 Profile & Smart Lists.**
- User Record Level Access (Tier 2 level).
- No option to switch back.



The screenshot shows a dialog box titled "Field Properties (smart list)". It contains several sections:

- Display Name:** A text input field containing "Smart List".
- Standard Properties:** A grid of checkboxes for "Required", "Duplicate Check", "Locked", "Quick View", "Searchable", "Hidden", "Restricted", and "Clear On Copy".
- Form & Field Properties:** A checkbox for "Secure Field (role permissions required to view information)".
- Smart Field Presets:** A dropdown menu currently showing "Caseworkers".
- Footer:** Two buttons labeled "Delete" and "Apply".

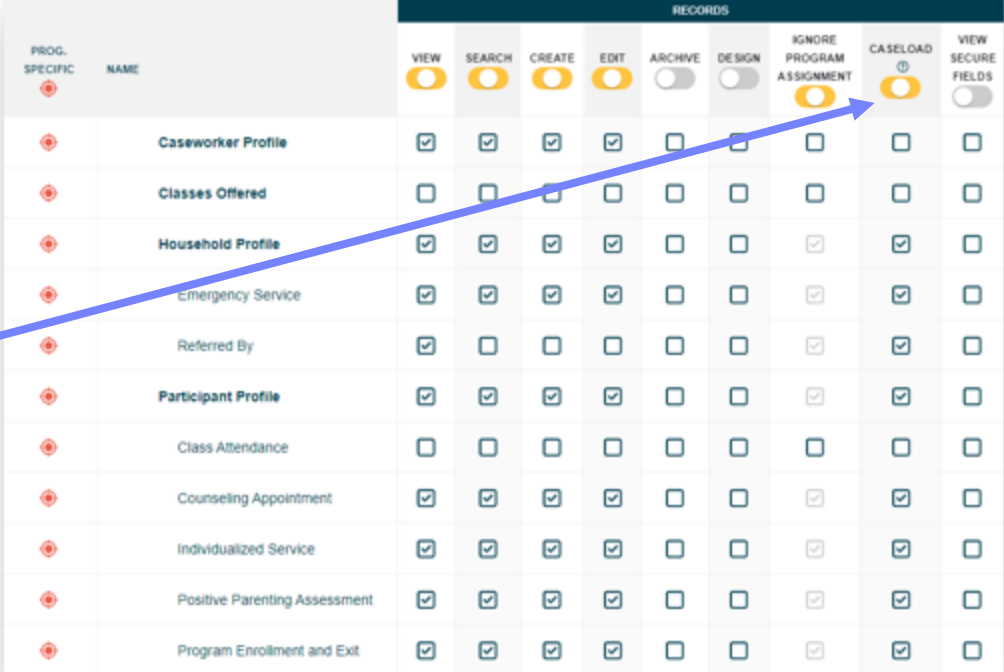
A blue arrow points from the text "Consider Tier 1 Profile & Smart Lists." in the list to the "Smart Field Presets" dropdown menu.



# Limitations of Role Based Permissions

## Role Based Permissions Does Not Support:

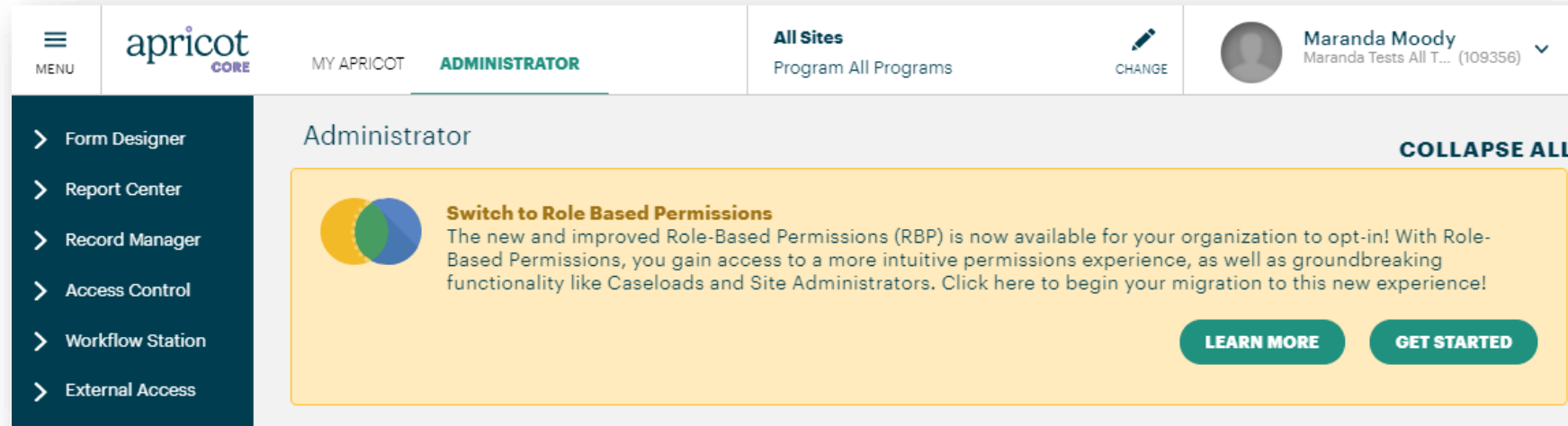
- Dynamic fields connected to Users.
- Custom fields in User profile.
- User Record Level Access (Tier 2 level).
  - **Can accomplish with Caseloads.**
- No option to switch back.



PROG. SPECIFIC	NAME	RECORDS								
		VIEW	SEARCH	CREATE	EDIT	ARCHIVE	DESIGN	IGNORE PROGRAM ASSIGNMENT	CASELOAD	VIEW SECURE FIELDS
+	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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
+	Classes Offered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>	<input 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
+	Referred By	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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"/>	<input type="checkbox"/>
+	Class Attendance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
+	Positive Parenting Assessment	<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"/>	<input type="checkbox"/>
+	Program Enrollment and Exit	<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"/>	<input type="checkbox"/>

# How to Migrate

# How to Migrate



The screenshot shows the Apricot CORE Administrator interface. The top navigation bar includes the Apricot CORE logo, the user's name (Maranda Moody), and the role (ADMINISTRATOR). A sidebar menu on the left lists various functions: Form Designer, Report Center, Record Manager, Access Control, Workflow Station, and External Access. The main content area displays a notification titled "Switch to Role Based Permissions" with a yellow background. The notification text states: "The new and improved Role-Based Permissions (RBP) is now available for your organization to opt-in! With Role-Based Permissions, you gain access to a more intuitive permissions experience, as well as groundbreaking functionality like Caseloads and Site Administrators. Click here to begin your migration to this new experience!" Below the text are two buttons: "LEARN MORE" and "GET STARTED".

**Step 1:** Click to [Get Started] with Migration.

**Step 2:** Review Disclaimers & click [Switch Now].

**Step 3:** Apricot converts Permission Sets to Roles.

**Step 4:** Review & clean up converted Roles.

**Step 5:** Apply new features.

# Role Review & Clean Up

Apricot creates a Role for every Permission set, so you may have duplicates.

- *Default Naming Convention: Permission Set Name – Program Name*
- Recommend consolidating & deactivating to streamline.

Optional, but recommended step after migration is complete.

Volunteer

DETAILS & PERMISSIONS ASSIGNED USERS

**Role Details**

NAME: Volunteer

DESCRIPTION: These permissions allow users to access volunteer and event records

**Permissions**

NAME	RECORDS							FORMS
	VIEW	SEARCH	CREATE	EDIT	ARCHIVE	CASELOAD	EDIT	
Classes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Donor Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

**Role Details**

**Deactivate Role**

ROLE NAME: Volunteer

Please type role name below to confirm role deactivation.

ROLE NAME:

Cancel Save

# New Features

## Site Admins

Advanced access for Standard Users within specific Sites:

- View All Configured Forms
- Create and Edit Users
- Create and Edit Programs
- Grant Permissions to Users
- Import Records
- Access Audit Trails
- Create Standard Reports

The screenshot displays the 'User Details' page in the Apricot 360 system. The interface is divided into three main sections: a left sidebar, a central user information panel, and a right-hand settings panel.

**Left Sidebar:** Contains the Apricot 360 logo and navigation links: 'Back to Apricot', 'Users', 'Roles', 'Caseload Manager', 'Sites & Programs', and 'Record Audits'.

**Central User Information Panel:** Titled 'User Details', it shows a profile picture placeholder, an email address 'carrie\_caseworker@ssg.com', first name 'Carrie', and last name 'Caseworker'. There is an 'ACTIVE' toggle switch that is currently turned on. An 'Update' button is located at the bottom right of this section. Below this is a 'Security' section with a 'PASSWORD' field containing masked characters and another 'Update' button.

**Right-hand Settings Panel:** Titled 'User Settings', it includes a 'USER TYPE' dropdown menu set to 'Standard'. Below that is a 'SITE ASSOCIATION' dropdown menu showing 'Apricot Training' and 'Case Management' as selected sites. At the bottom, there is a 'Site Administrator Allowed' toggle switch that is turned on, followed by a section titled 'Select which sites this user can administer below...' with a table of permissions:

SITES	CREATE/EDIT FORMS	UNARCHIVE RECORDS
<input type="checkbox"/> Apricot Training	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Case Management	<input type="checkbox"/>	<input type="checkbox"/>

# New Features

## Caseloads

Ability to assign & limit User access to specific Participants.

- Protects Data Security
- Streamlines Workflow
- New version of User RLA

The screenshot displays two overlapping views of the Apricot 360 software interface. The background view is a modal titled "Edit Carrie Caseworker's Caseload" with a close button (X) in the top right. Below the title, it states "Current Caseload: 7 record(s)". There are two tabs: "CASELOAD" (active) and "TRANSFER". A search bar and a dropdown menu labeled "Select..." are visible. Below this is a table with two columns: "PARTICIPANT NAME" and "ASSIGNED STAFF".

PARTICIPANT NAME	ASSIGNED STAFF
Lonnie M Singer	Carrie Caseworker
April Billingslea	Ian Intake, Carrie Caseworker
Sarah Greene	Carrie Caseworker
Beth Crane	Kevin Case, Carrie Caseworker
Vicky Grayson	Carrie Caseworker

At the bottom of the modal, there is a "VIEW" dropdown set to "5" and a "PAGE" indicator showing "1".

The foreground view is the "My Caseload" page for an administrator. It features a dark blue sidebar menu with the following items: Dashboard, Inventory, Search Records, My Apricot Tools (expanded), My Caseloads (highlighted), My Reports, My Bulletins, My Shared Files, Schedule, Classes & Terms, and My Referrals. The main content area shows the title "My Caseload" and a table with the column "PARTICIPANT NAME" listing: Lonnie Singer, April Billingslea, Asher Billingslea, Sarah Greene, and Beth Crane.

# New Features

## Secure Fields

Option to restrict access to sensitive data fields to only certain users.

MY APRICOT ADMINISTRATOR

### Participant Profile

#### Participant Contact Information

Name  Middle

Social Security Number  [Show](#) | [Update](#)

Home Phone    ext.

Work Phone    ext.

Home Address  [Clear](#) | [Show](#) | [Update](#)

NAME	RECORDS						VIEW SECURE FIELDS	FORMS
	VIEW	SEARCH	CREATE	EDIT	ARCHIVE	CASELOAD		
Class Profile	<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"/>	<input type="checkbox"/>
Donor Profile	<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"/>	<input type="checkbox"/>
Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Donation	<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"/>	<input type="checkbox"/>
External Referral	<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"/>	<input type="checkbox"/>
Household Profile	<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"/>	<input type="checkbox"/>
Party Intake	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Party Service Log	<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"/>	<input type="checkbox"/>
Job Placement Employer Pr...	<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"/>	<input type="checkbox"/>
Participant Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# 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)

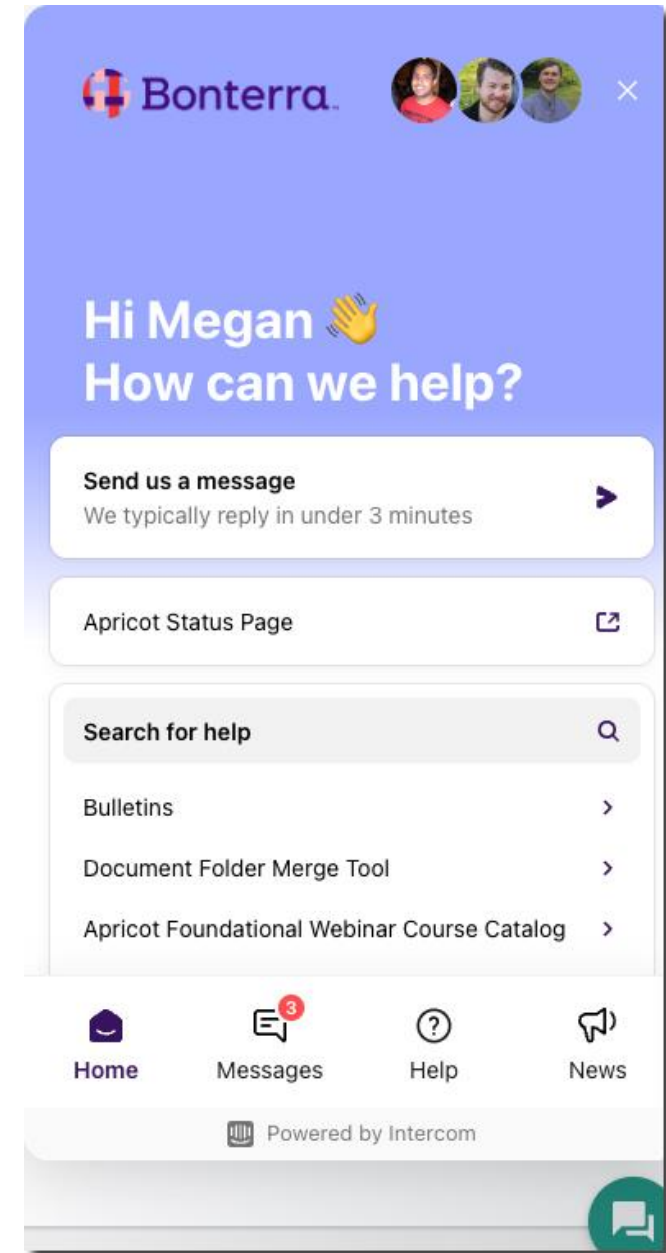


Build confidence & knowledge in  
our software!

# 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.