

# Granting Standard Users Advanced Permissions

Welcome, we will start shortly!

# Meet Your Trainer

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# Learning Objective

By the end of this session, our goal is to give you a thorough understanding of the different advanced permissions you can assign your Users to help you manage your database.

# Agenda

Managing User Access

Site Administrators

Advanced Access

Comparison & Reminders

# Managing User Access

# Managing User Access

## **Administrators** > Widest Access & Responsibility

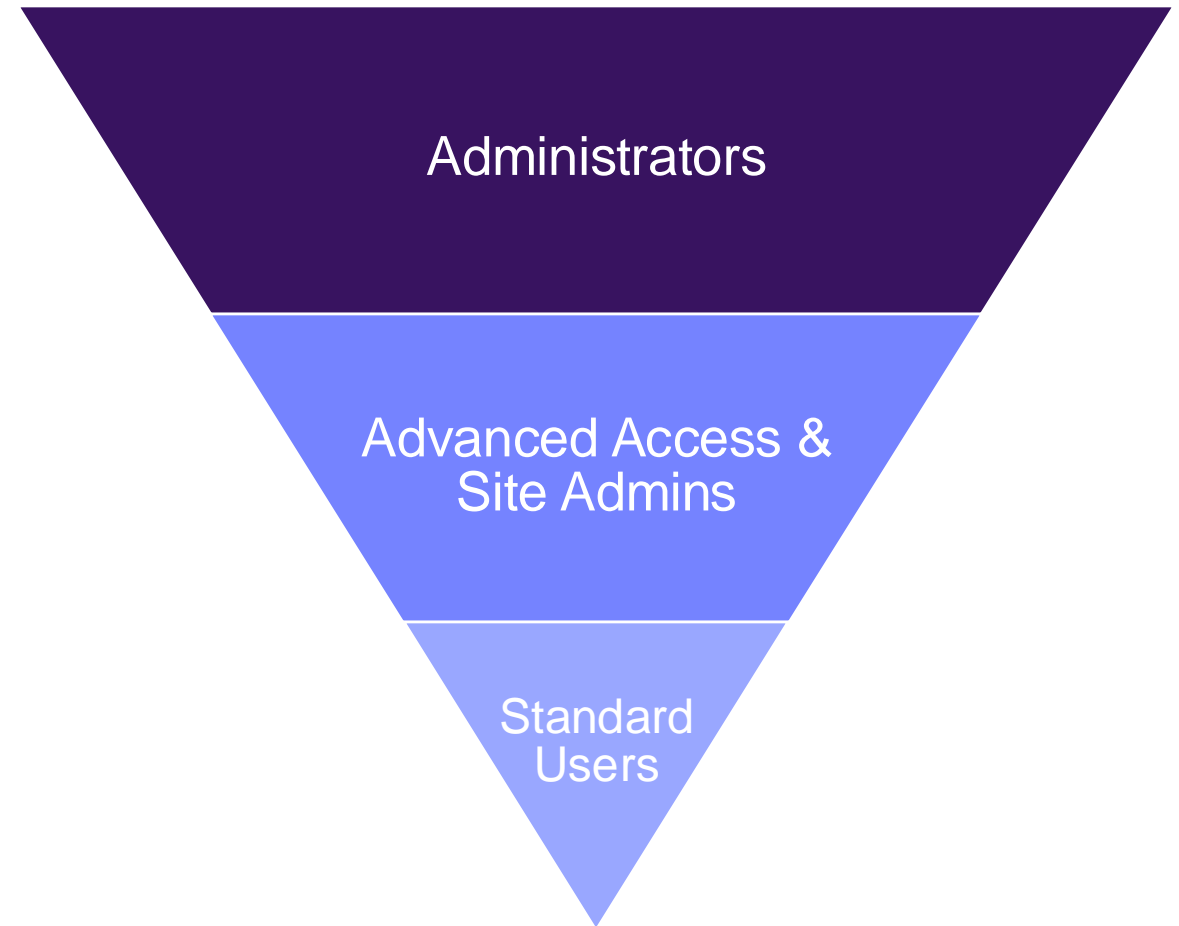
- Limited Count of Users
- Manager / Director

## **Advanced Permissions** > Select Abilities

- Small to Medium Group
- Supervisors / Managers

## **Standard Users** > Most Controlled Access

- Largest Group
- Frontline Staff



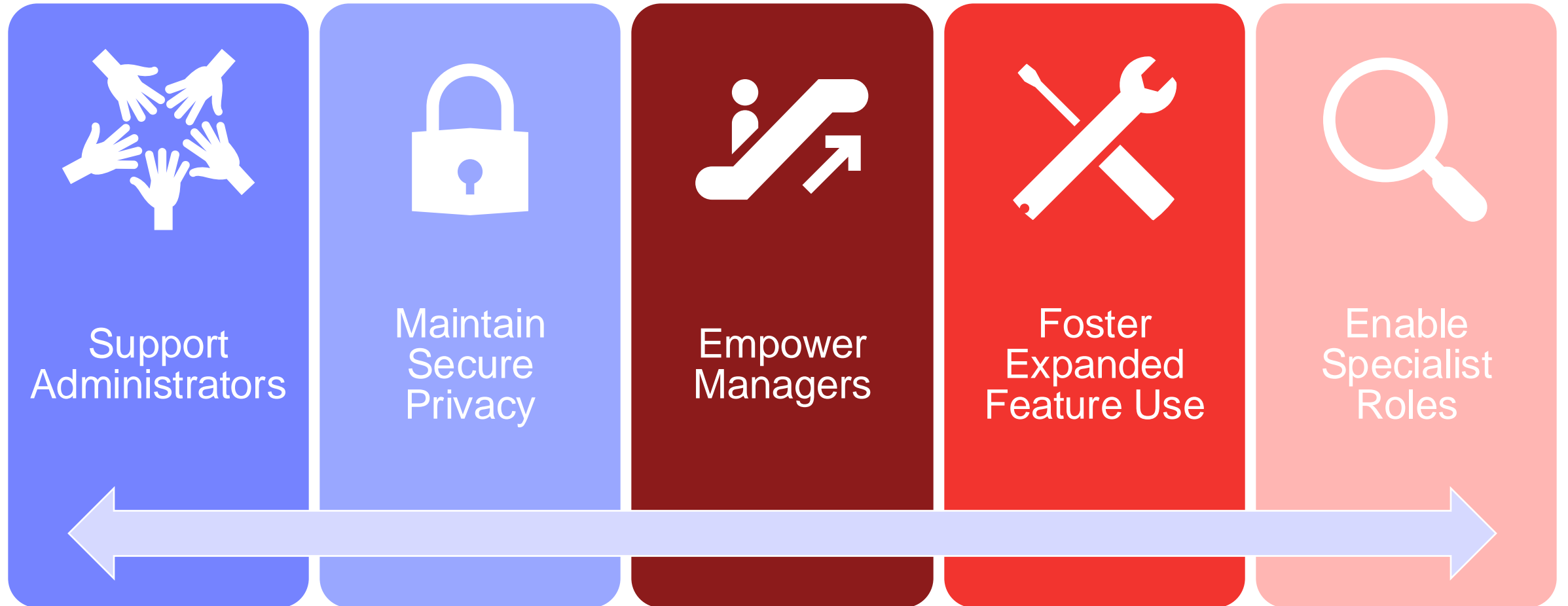
# Managing User Access

- See available and active user count by type under Access Control > Users.
- Standard User Count includes Administrators.
- No limit to users with Advanced Permissions.

The screenshot displays the 'Users' management page in the Apricot 360 system. The sidebar on the left contains the following navigation items: 'Back to Apricot', 'Users', 'Roles', 'Caseload Manager', 'Sites & Programs', and 'Record Audits'. The main content area features a search bar and a summary box with the following text: 'Administrator: 2 allowed (1 left) Standard Users: 20 allowed (12 left)'. Below this is a table of users.

	NAME	USERNAME
	Kevin Case	kevin_casemanager@ssg.com
	Carrie Caseworker	carrie_caseworker@ssg.com
	Dora Development	dora_diaz@ssg.com
	Ian Intake	ian@example.com

# Benefits of Advanced Permissions





# Site Administrators

# Site Administrators

- Ability to grant Standard User **Site specific** Admin capabilities.

## Included Access:

- 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 Apricot 360 interface. On the left is a dark teal sidebar with the Apricot 360 logo and navigation links: Back to Apricot, Users, Roles, Caseload Manager, Sites & Programs, and Record Audits. The main content area is titled 'Apricot Training' and features a 'Site Details' section with fields for NAME (Apricot Training) and STATUS (Active). Below this is a 'DESCRIPTION' field and two buttons: 'Show More' and 'Update'. A 'Site Admins' table is shown below, with a search bar and a table with columns: NAME, EMAIL, CREATE/EDIT FORMS, and UNARCHIVE RECORDS. The table contains one entry for Kevin Case with email kevin\_casemanager@ssg.com. At the bottom of the table are pagination controls (VIEW 10, PAGE 1 of 1) and an 'ADD SITE ADMIN' button.

NAME	EMAIL	CREATE/EDIT FORMS	UNARCHIVE RECORDS
Kevin Case	kevin_casemanager@ssg.com	✓	✓

# How to Enable

**Step 1:** Go to Access Control > Users.

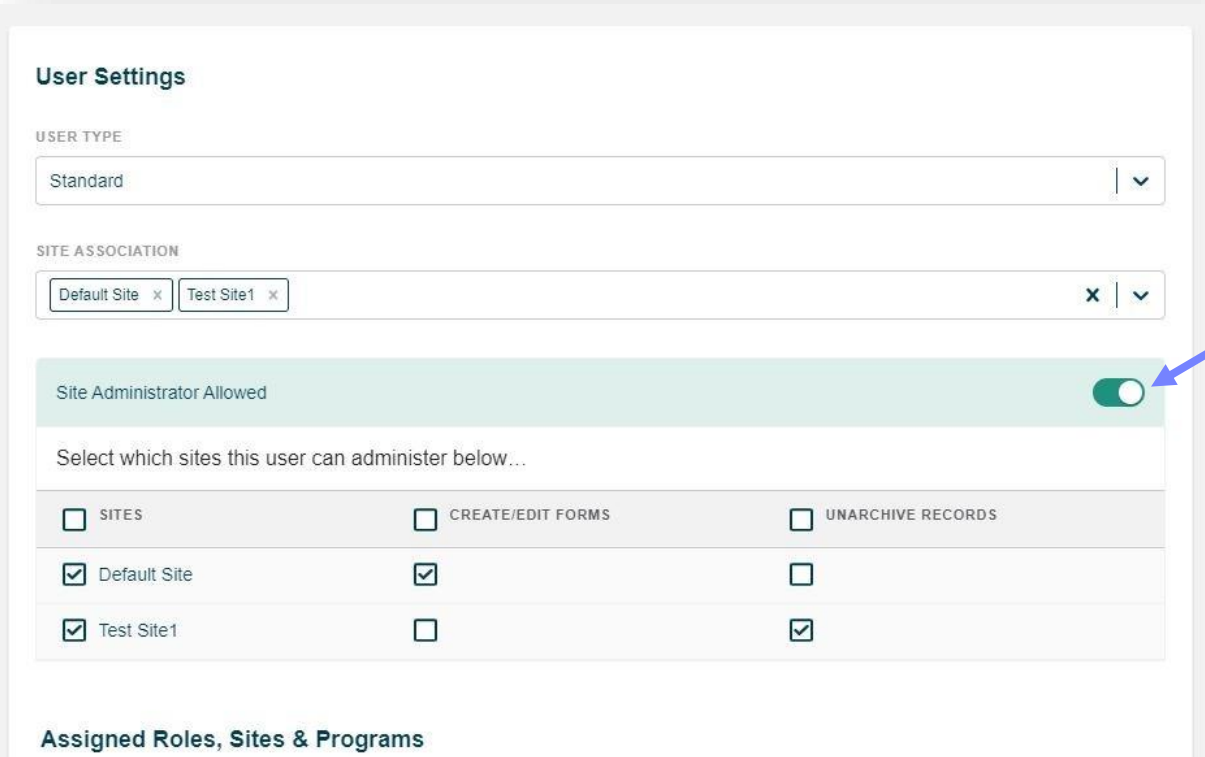
**Step 2:** Select User & Toggle on Site Administrator Allowed.

**Step 3:** Check box for Site(s).

**Step 4:** Determine additional access:

- Create/Edit Forms
- Unarchive Records

**Step 5:** Save



The screenshot displays the 'User Settings' configuration page. At the top, the 'USER TYPE' is set to 'Standard'. Below that, the 'SITE ASSOCIATION' field shows 'Default Site' and 'Test Site1' as selected sites. A prominent green bar contains the 'Site Administrator Allowed' toggle, which is currently turned on, indicated by a blue arrow. Below this bar, a section titled 'Select which sites this user can administer below...' contains a table of permissions for each site.

SITES	CREATE/EDIT FORMS	UNARCHIVE RECORDS
<input checked="" type="checkbox"/> Default Site	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Test Site1	<input type="checkbox"/>	<input checked="" type="checkbox"/>

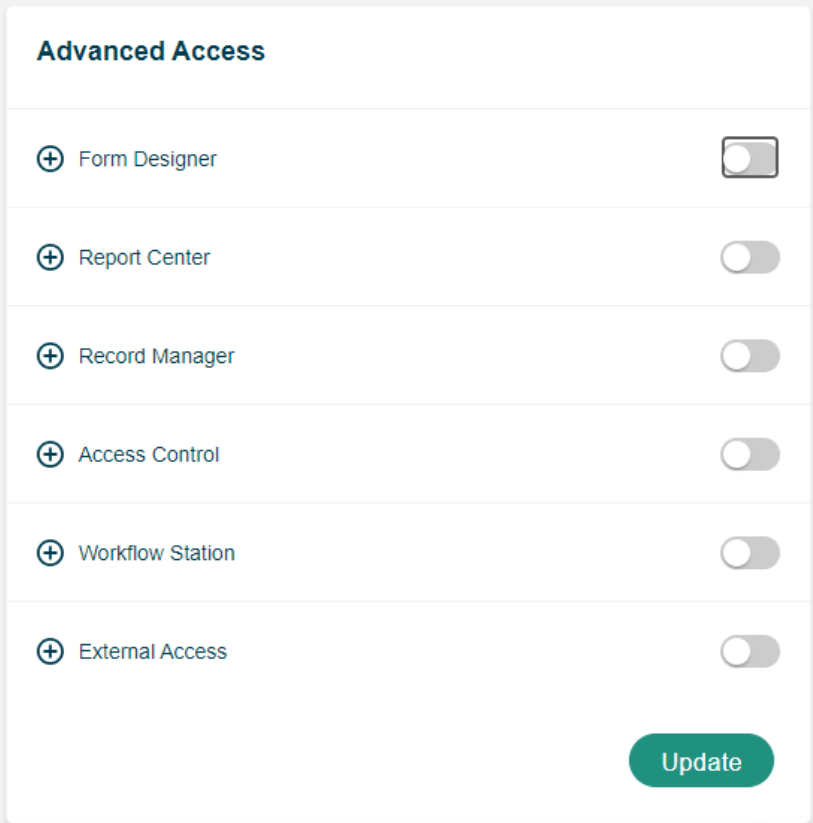
# Advanced Access

# Advanced Access

- Ability to grant Standard Users **feature specific** Admin access.
- Recommended for specific use cases, supporting an Admin.

## Examples:

- Grant Manager needs to run Reports.
- Outreach Coordinator needs to manage Connect.
- Intake Manager needs to update external forms.
- Intern needs to help Import records.
- Compliance Officer needs to check Record Audits.



The screenshot shows a settings panel titled "Advanced Access". It contains a list of six features, each with a plus icon in a circle and a toggle switch. The "Form Designer" toggle is currently turned on, while the others are off. A green "Update" button is located at the bottom right of the panel.

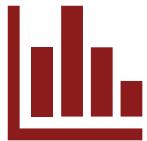
Feature	Access Status
Form Designer	On
Report Center	Off
Record Manager	Off
Access Control	Off
Workflow Station	Off
External Access	Off

# Advanced Access



## Form Designer

- Standard Forms
- Templates
- Lookup Lists



## Report Center

- Reports
- Data Archives



## Record Manager

- Imports
- Archived Records
- Record Audits



## Access Control

- Bulk Assignments
- Account Information



## Workflow Station

- Bulletins
- Shared Files
- Apricot Settings



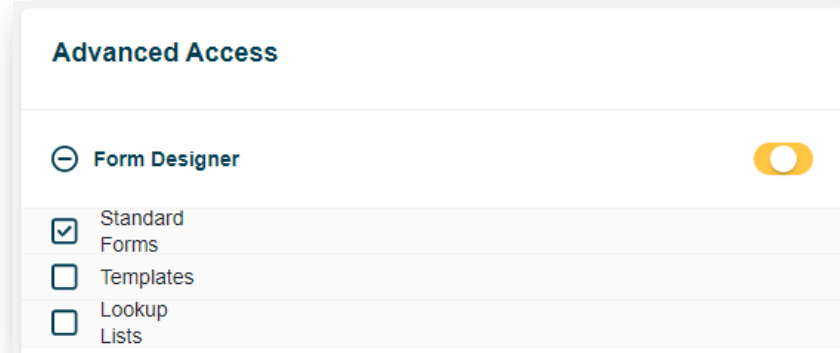
## External Access

- Secure Web Forms
- Connect
- Intake

# How to Enable

## Step 1: At the User Level.

- Toggle on all or expand category to select a few.



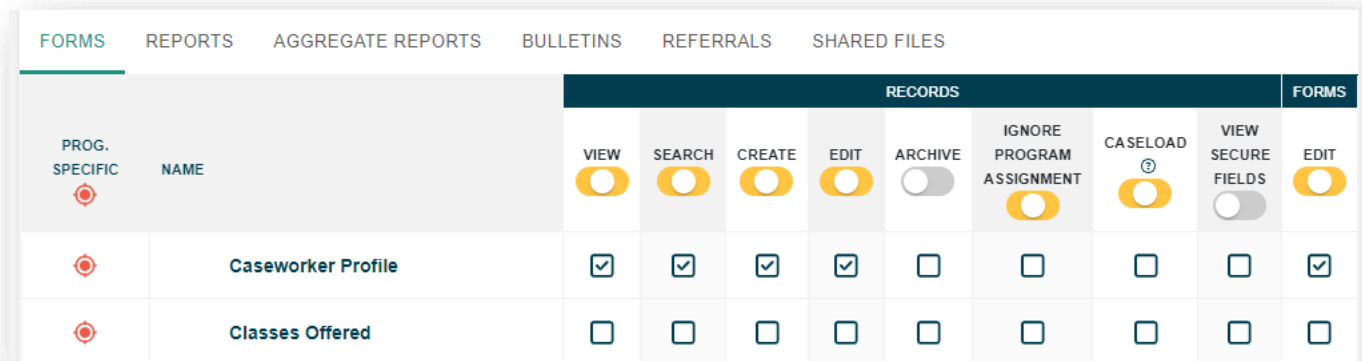
**Advanced Access**

Form Designer

- Standard Forms
- Templates
- Lookup Lists

## Step 2: At the Role Level.

- Completes the process for specific existing Forms & Reports.



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											
	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 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"/>											

# Comparison & Reminders



# Advanced Permissions Comparison

	Full Admin	Site Admin	Advanced Access
Scope	Full Instance	Specific Site(s)	Full Instance
<b>Form Designer</b>			
Create New Forms	Y	Y	Y
Manage Existing Forms	Y	Only Specified	Only Specified
Use Templates	Y	Y	Y
Lookup Lists	Y	Y	Y
Smart Field Presets	Y		
<b>Report Center</b>			
Create New Reports	Y	Y	Y
Manage Existing Reports	Y	Only Specified	Only Specified
Data Archives	Y		Y
Results Reporting (Apricot Enterprise / 360)	Y		

# Advanced Permissions Comparison

	Full Admin	Site Admin	Advanced Access
Scope	Full Instance	Specific Site(s)	Full Instance
<b>Access Control</b>			
Create New Users	Y	Standard Users	
Manage Existing Users	Y		
Create & Manage Roles	Y		
Create New Sites	Y		
Manage Existing Sites	Y		
Create New Programs	Y	Y	
Manage Existing Programs	Y	Y	
Configure Caseloads	Y		
Manage / Assign Caseloads	Y	Y	
Undo Bulk Assignments	Y		Y

# Advanced Permissions Comparison

	Full Admin	Site Admin	Advanced Access
Scope	Full Instance	Specific Site(s)	Full Instance
<b>Workflow Station</b>			
Rules & Alerts	Y		
Workflow Builder	Y		
Create New Bulletins	Y		Y
Manage Existing Bulletins	Y		
Add New Shared Files	Y		Y
Manage Existing Shared Files	Y		
Update Apricot Settings	Y		Y
<b>External Access &amp; Connect</b>			
Create New Intake Forms	Y		Y
Manage Existing Intake Forms	Y		
Create & Manage Participant Types	Y		Y
Update Connect Settings	Y		
Send New Direct Messages	Y		Y
Manage Direct Messages	Y		

# Reminders

1. Full Admin access is required to manage everything; Advanced Permissions only go so far.
  - *Advanced Access allows for creating new Forms or Reports, but managing only specific existing ones.*
  - *Site Admins can create & manage their own Standard Users, but not any existing.*
  - *Only Full Admins can manage features like Smart Fields, Rules & Alerts, Workflows.*
2. There is no way to limit records that full Admins see, so choose a lower level if privacy concerns.
3. Site Admins have Site specific access; Advanced Access is Feature specific.
4. Advanced Access to edit existing Forms & Reports requires enablement at User & Role level.
5. Any Advanced Permissions can be revoked at any time if a User's needs change.

# 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)

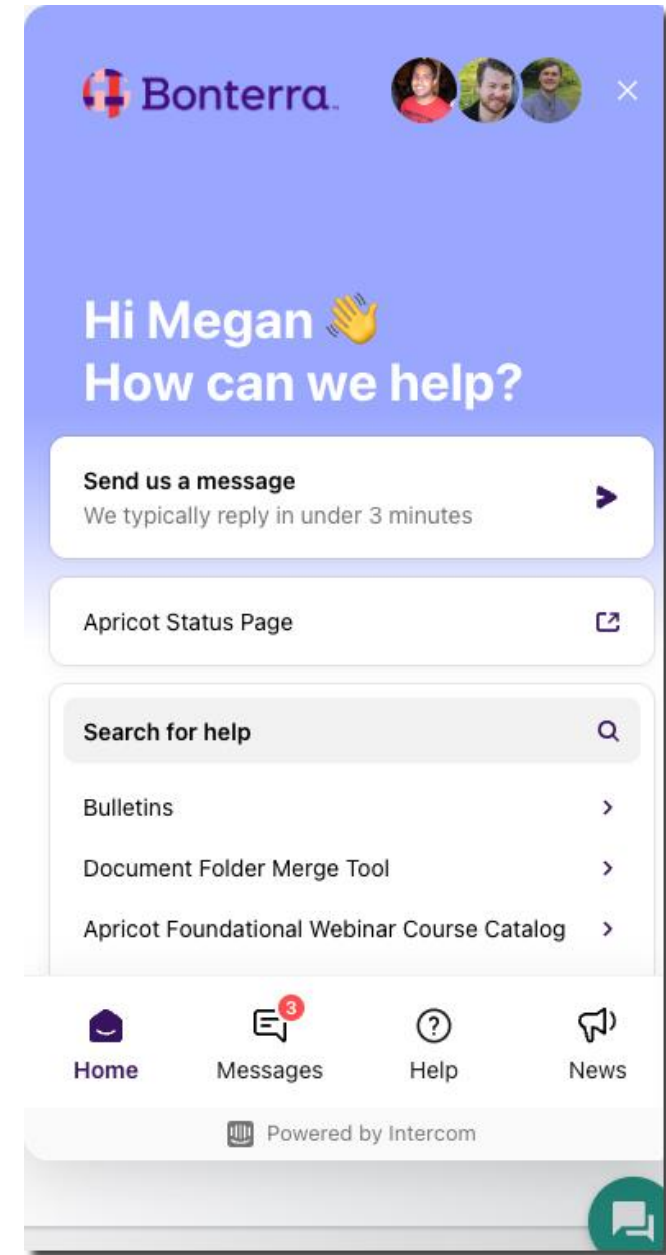


Build confidence & knowledge in  
our software!

# 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.