

Apricot

Becoming a Strong Admin

We will begin shortly!

Meet Your Trainer

Jaime Ransom

Training & Development Associate

Learning Objective

To help attendees understand the best practices and expectations of a user in the Administrator role

Agenda

Role Of An Administrator

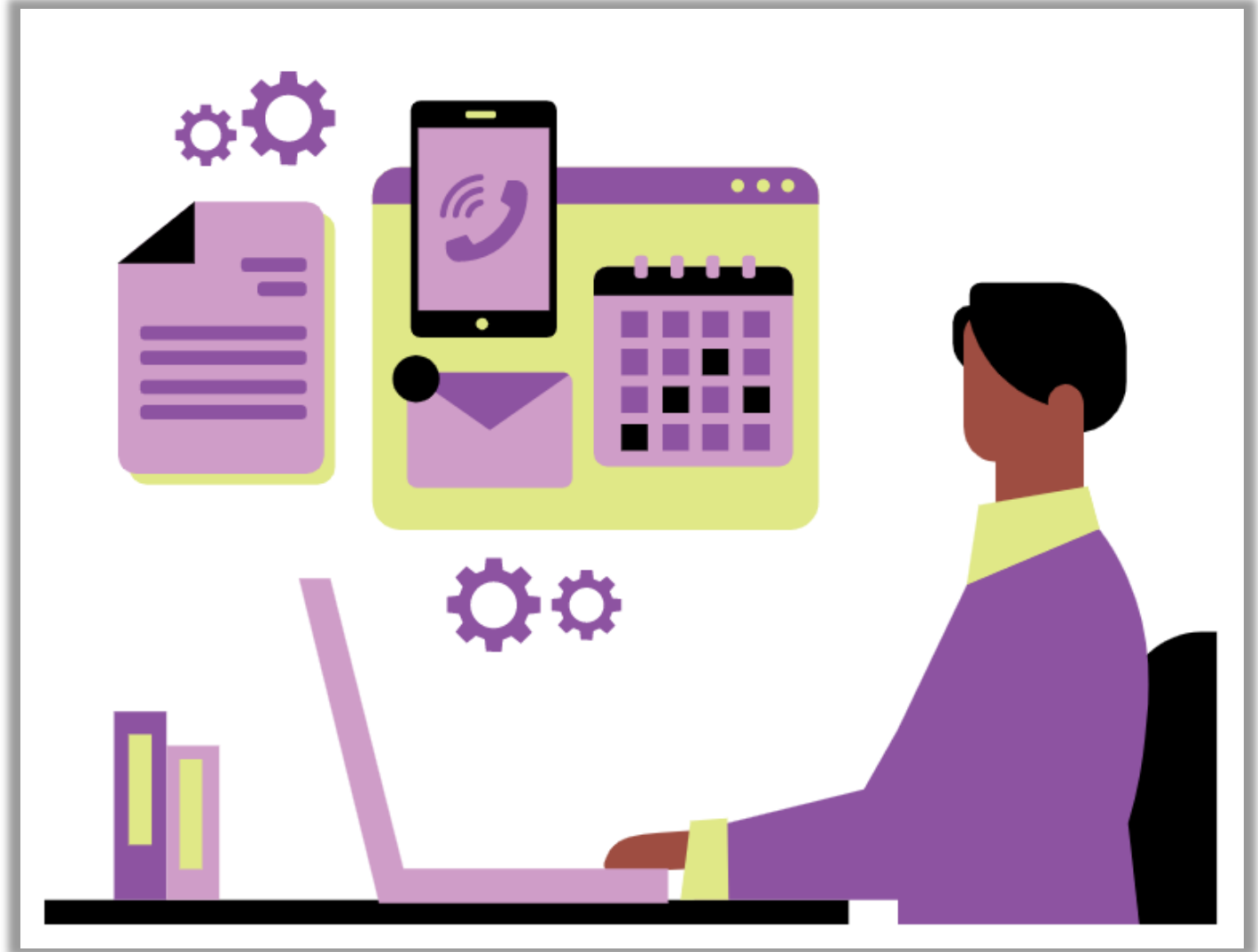
Admin Duties In Implementation

Admin Duties After Go Live

Role of an Administrator

Role of an Administrator

- Access to Data Entry & Design Tools.
- Defines what users can see
- Support users
- Can have 2 people fill this role



Role of an Administrator

Two Phases

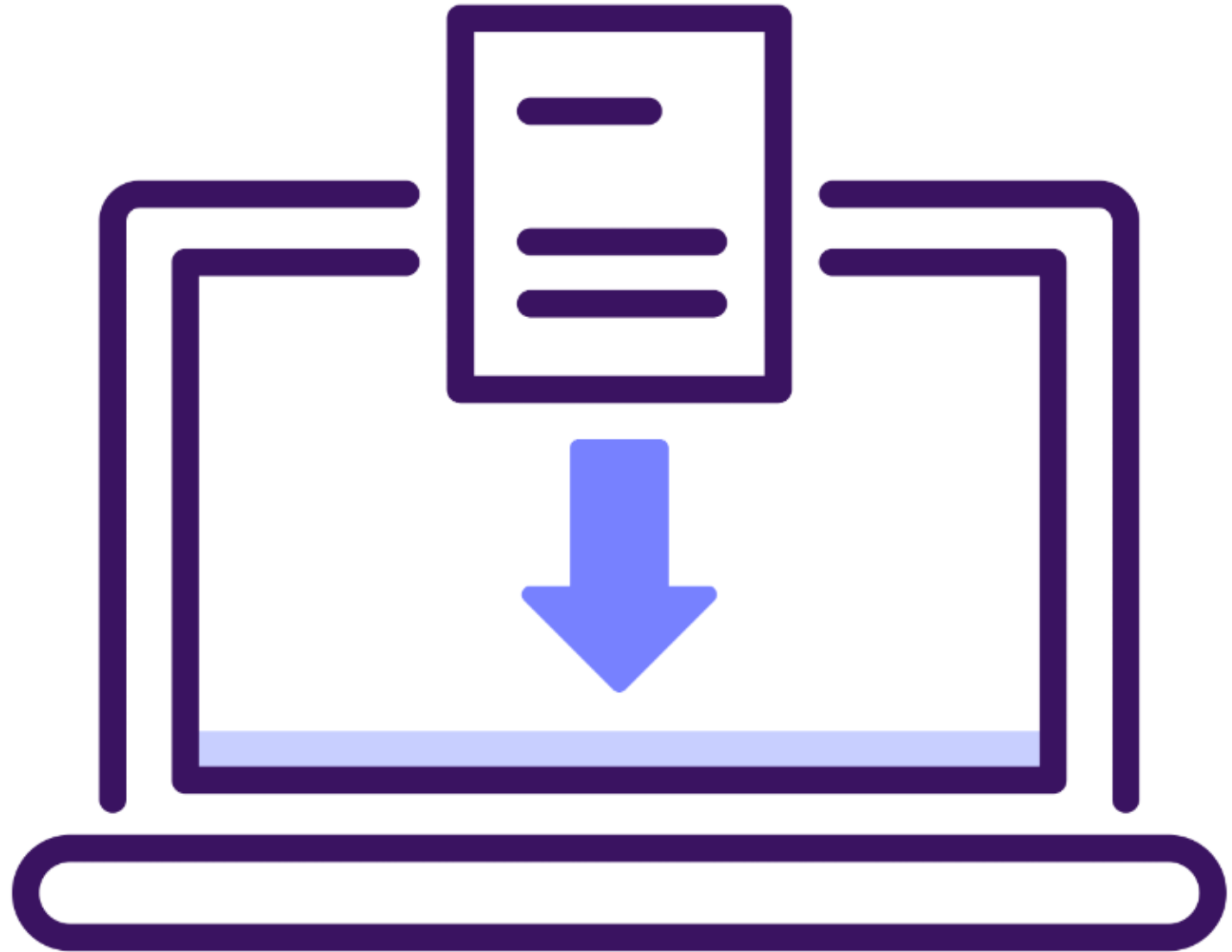
1. Implementation



Role of an Administrator

Two Phases

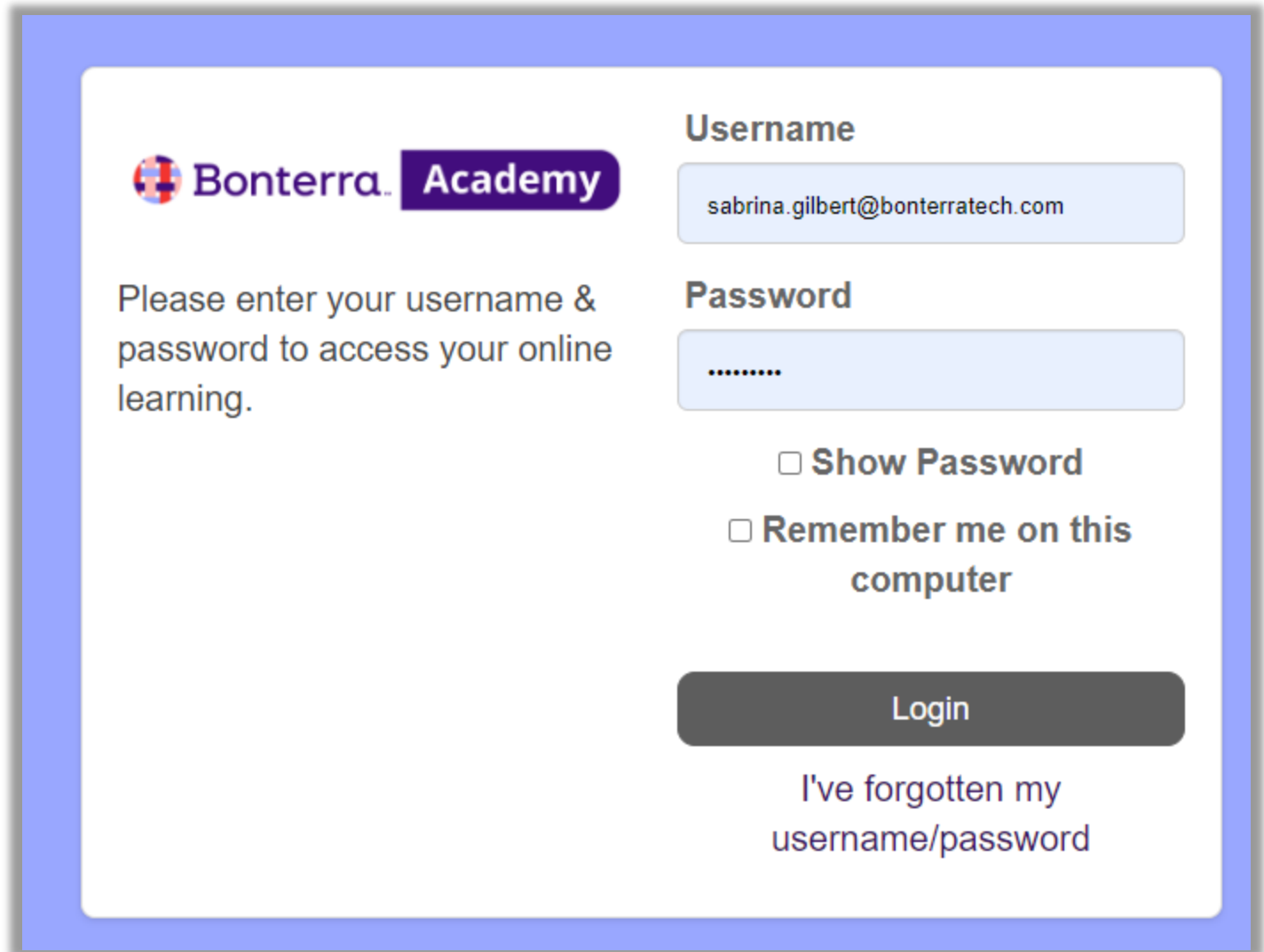
1. Implementation
2. Tracking Live Cases



Admin Duties During Implementation

During Implementation

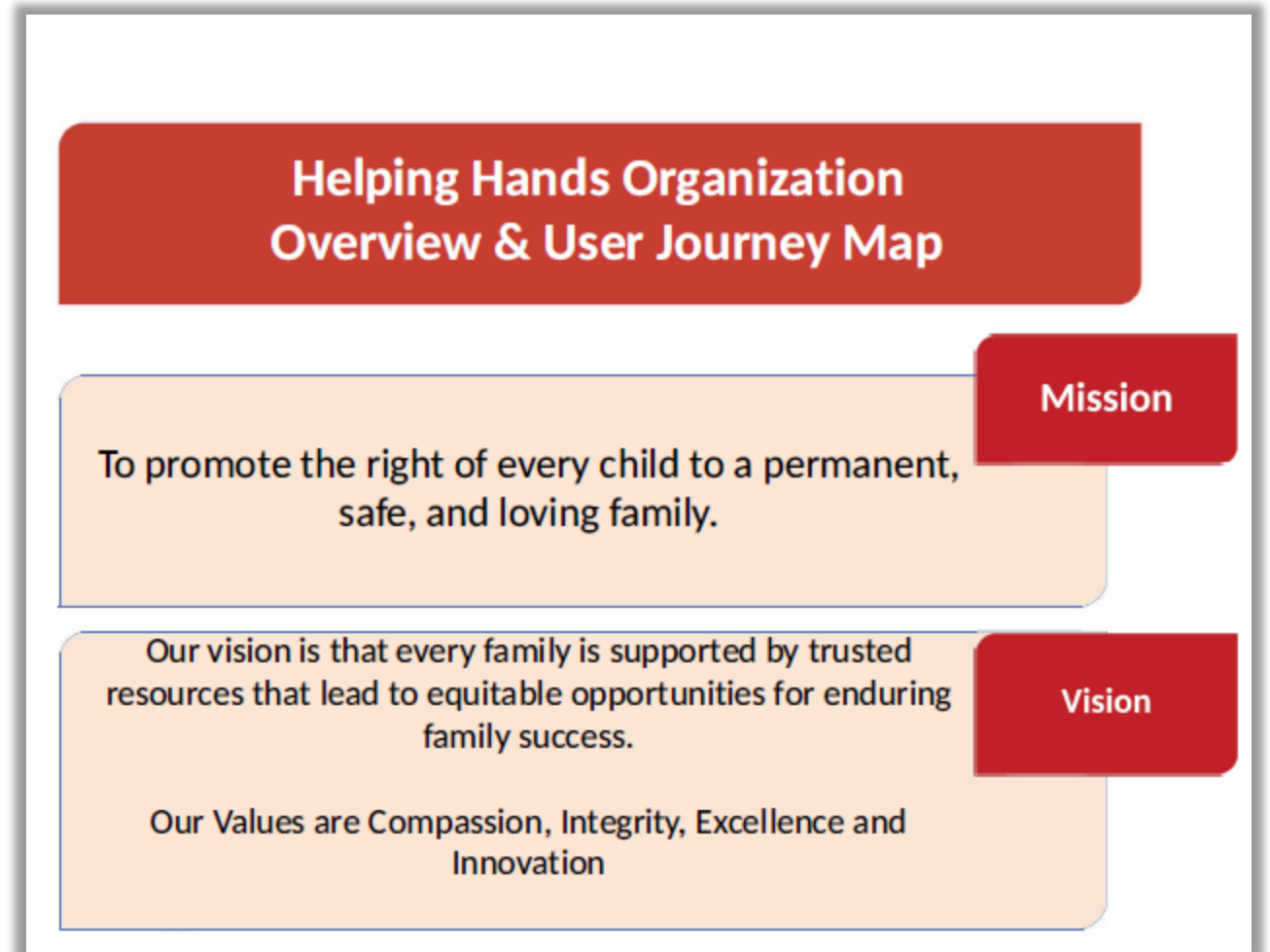
- Learn the software



The screenshot shows a login interface for Bonterra Academy. On the left, there is a logo consisting of a red and blue cross inside a circle, followed by the text "Bonterra." in purple and "Academy" in white on a purple rounded rectangle. Below the logo, the text reads: "Please enter your username & password to access your online learning." On the right side, there are two input fields: "Username" with the value "sabrina.gilbert@bonterratech.com" and "Password" with a masked value ".....". Below the password field are two checkboxes: "Show Password" and "Remember me on this computer". At the bottom right, there is a dark grey "Login" button and a link that says "I've forgotten my username/password".

During Implementation

- Learn the software
- Work with your Project Manager on design



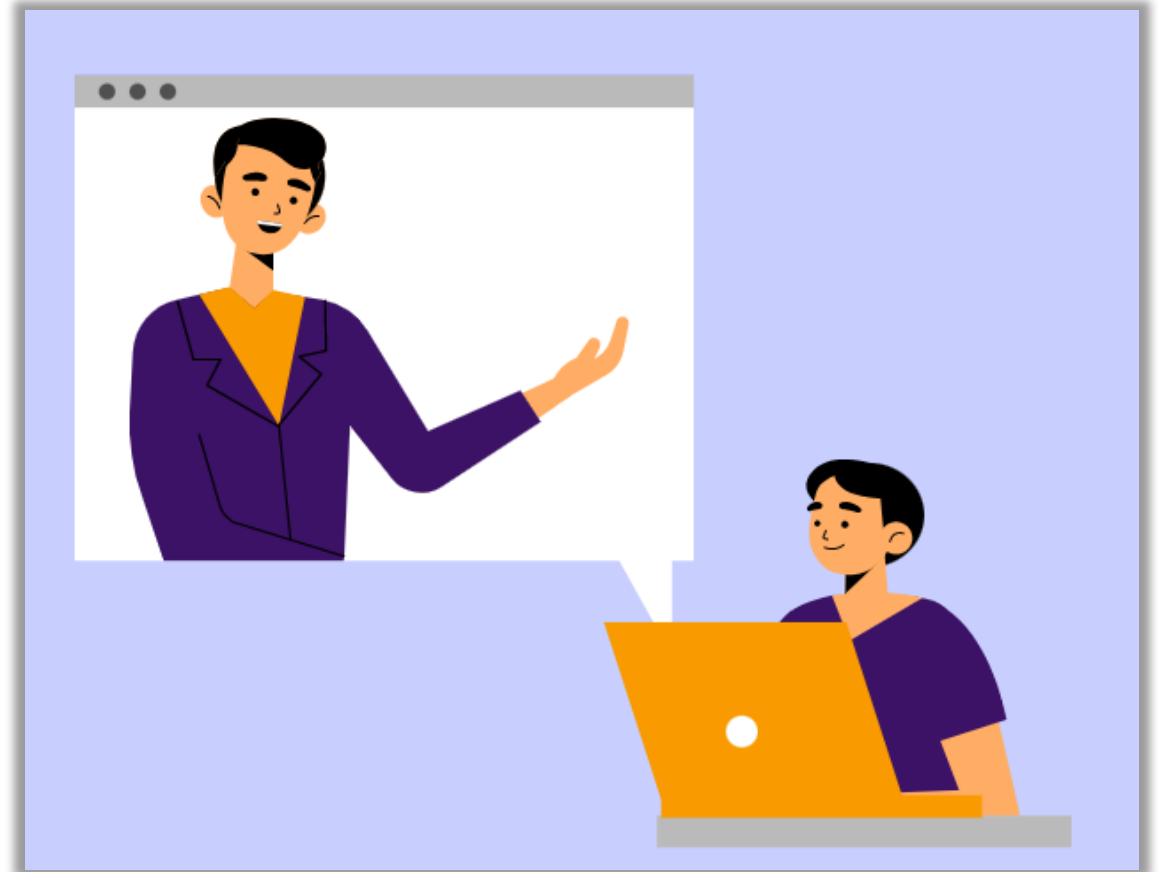
During Implementation

- Learn the software
- Work with your Project Manager on design
- Prepare for Launch



Learn the Software

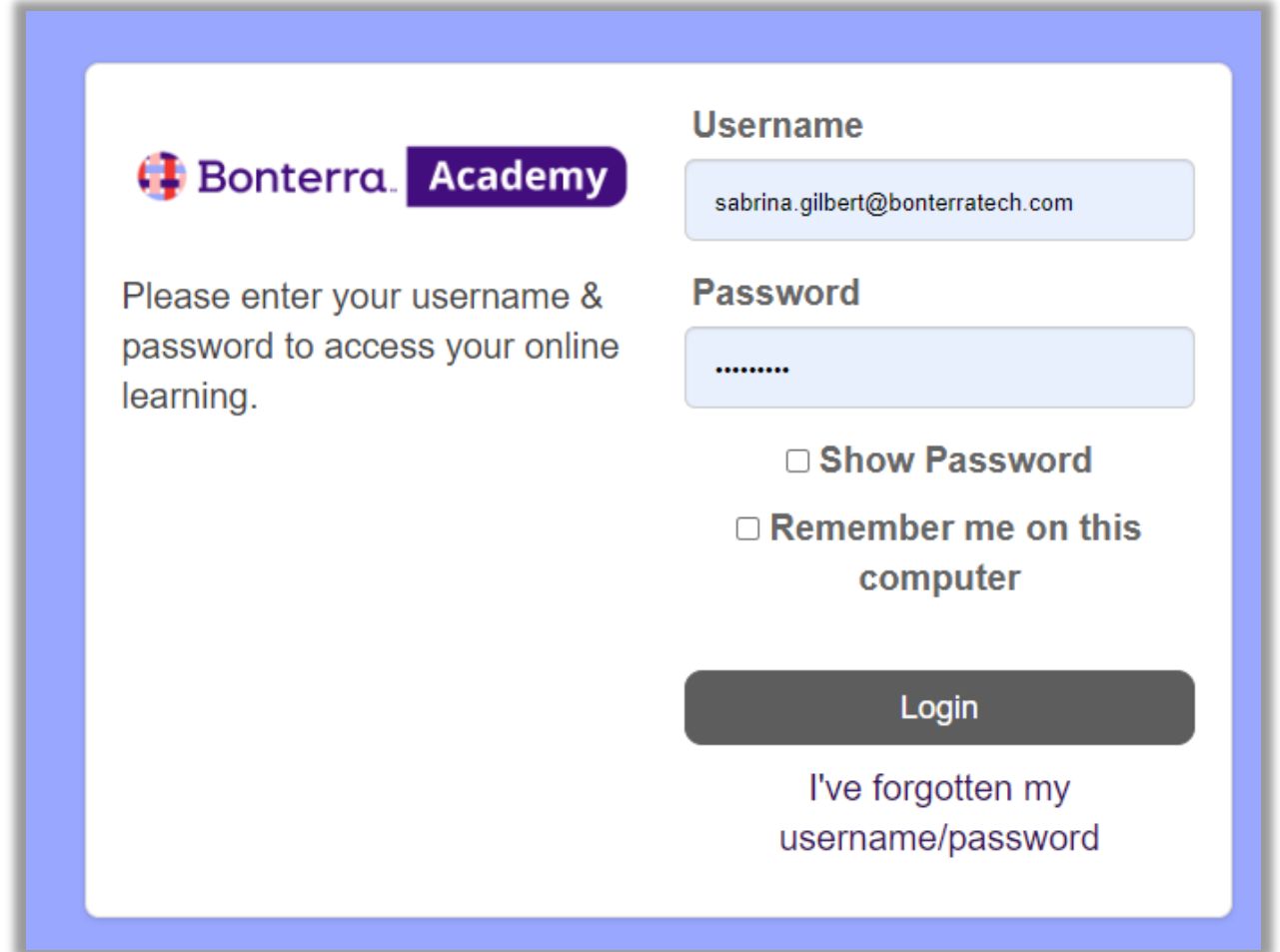
- Data entry & Admin functionality
- Informed decisions
- Ensures design best meets your organization's needs




Learn the Software

Suggested Learning Path

1. Apricot 101, 201, 301



The screenshot shows the Bonterra Academy login interface. It features the Bonterra Academy logo at the top left, followed by a prompt to enter a username and password. The username field contains 'sabrina.gilbert@bonterratech.com'. The password field is masked with dots. Below the password field are two checkboxes: 'Show Password' and 'Remember me on this computer'. A 'Login' button is positioned below the checkboxes, and a link for 'I've forgotten my username/password' is at the bottom.

 **Bonterra Academy**

Please enter your username & password to access your online learning.

Username
sabrina.gilbert@bonterratech.com

Password
.....

Show Password

Remember me on this computer

Login

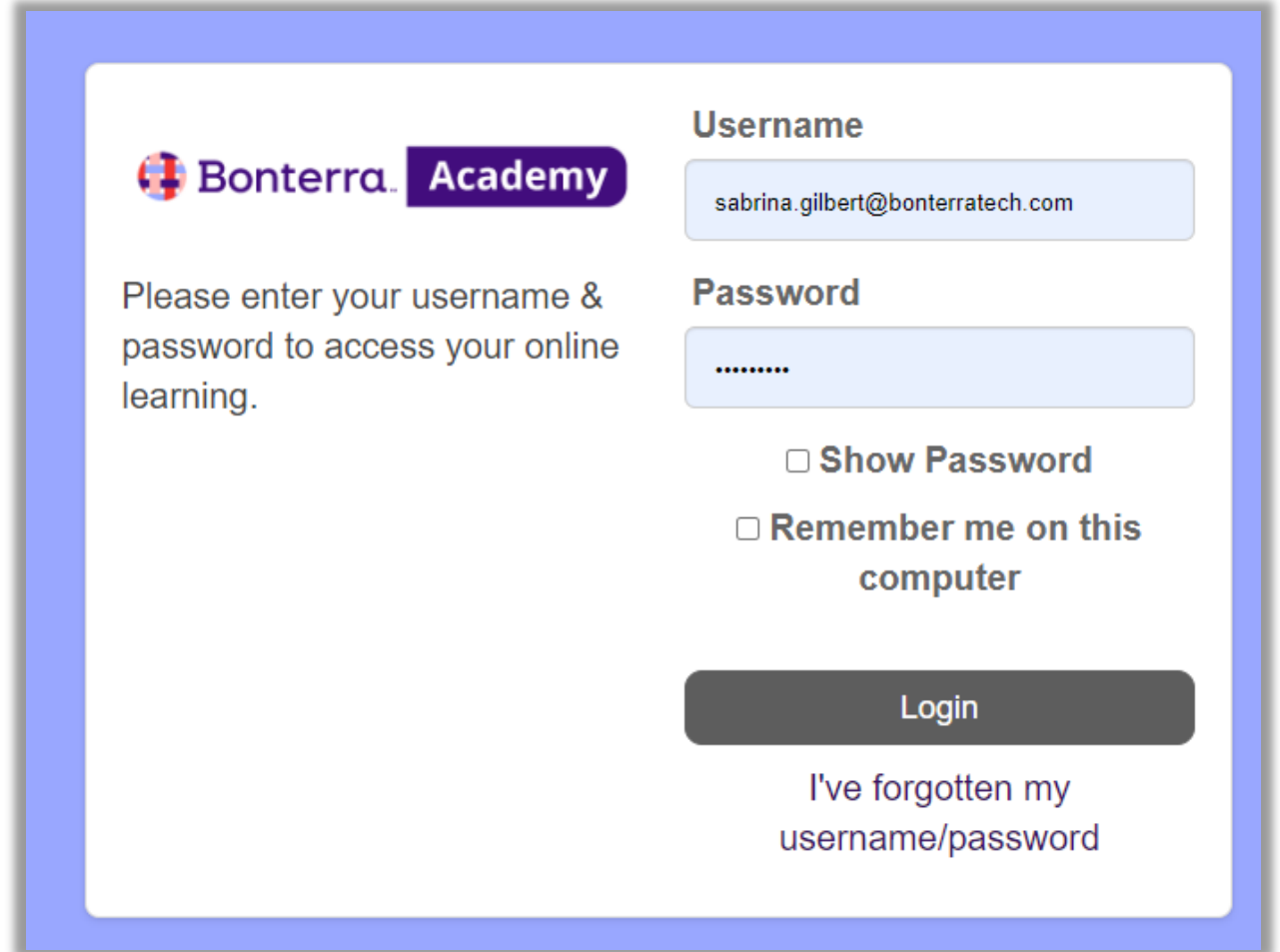
[I've forgotten my username/password](#)

 Save for later


Learn the Software

Suggested Learning Path

1. Apricot 101, 201, 301
2. Administrator Features in Bonterra Academy



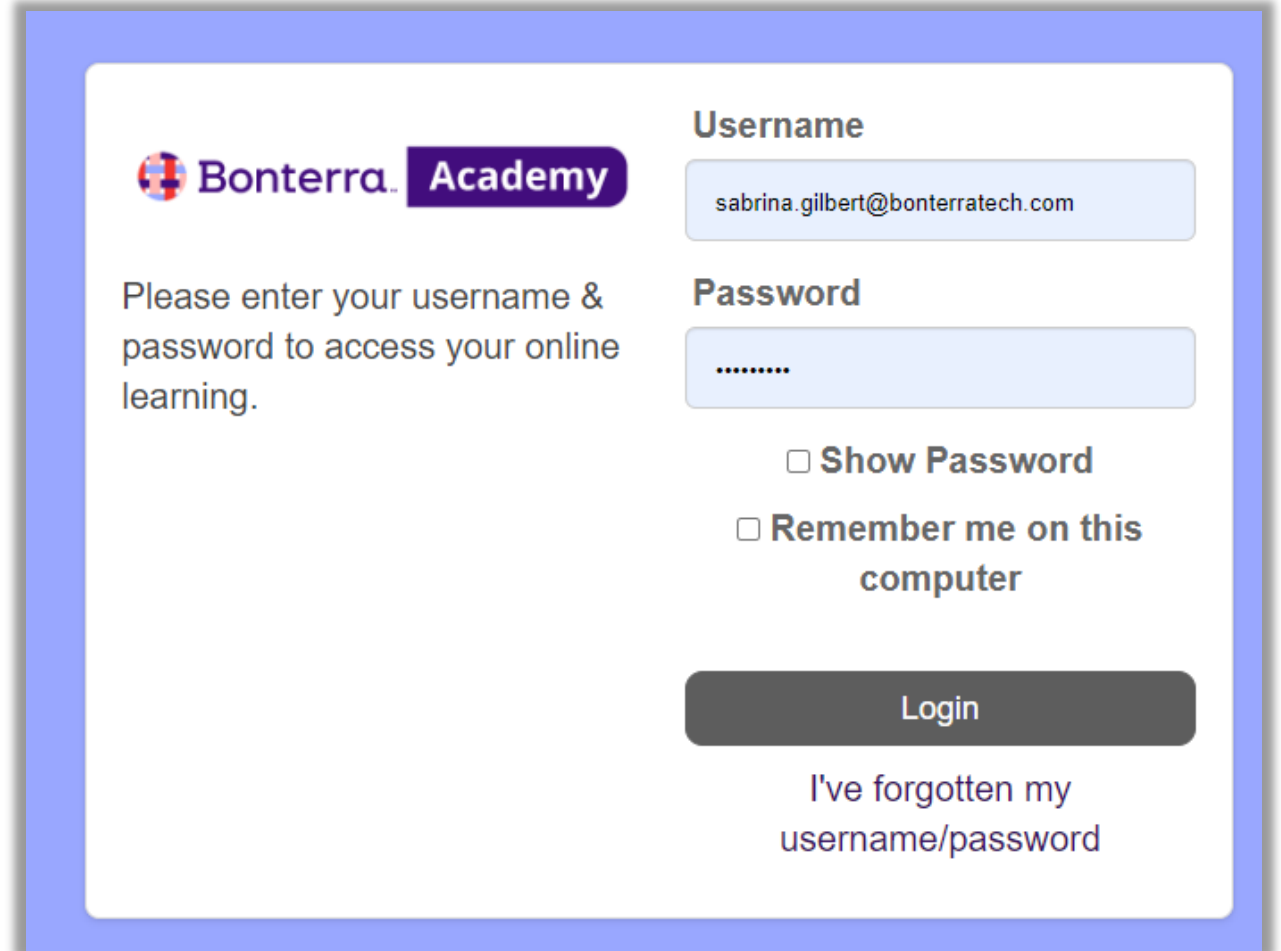
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 Save for later

Learn the Software

Suggested Learning Path

1. Apricot 101, 201, 301
2. Administrator Features in Bonterra Academy
3. Register for Free account (link in chat)
 1. Code; CORE ADMIN



 **Bonterra Academy**

Please enter your username & password to access your online learning.

Username
sabrina.gilbert@bonterratech.com

Password
.....

Show Password

Remember me on this computer

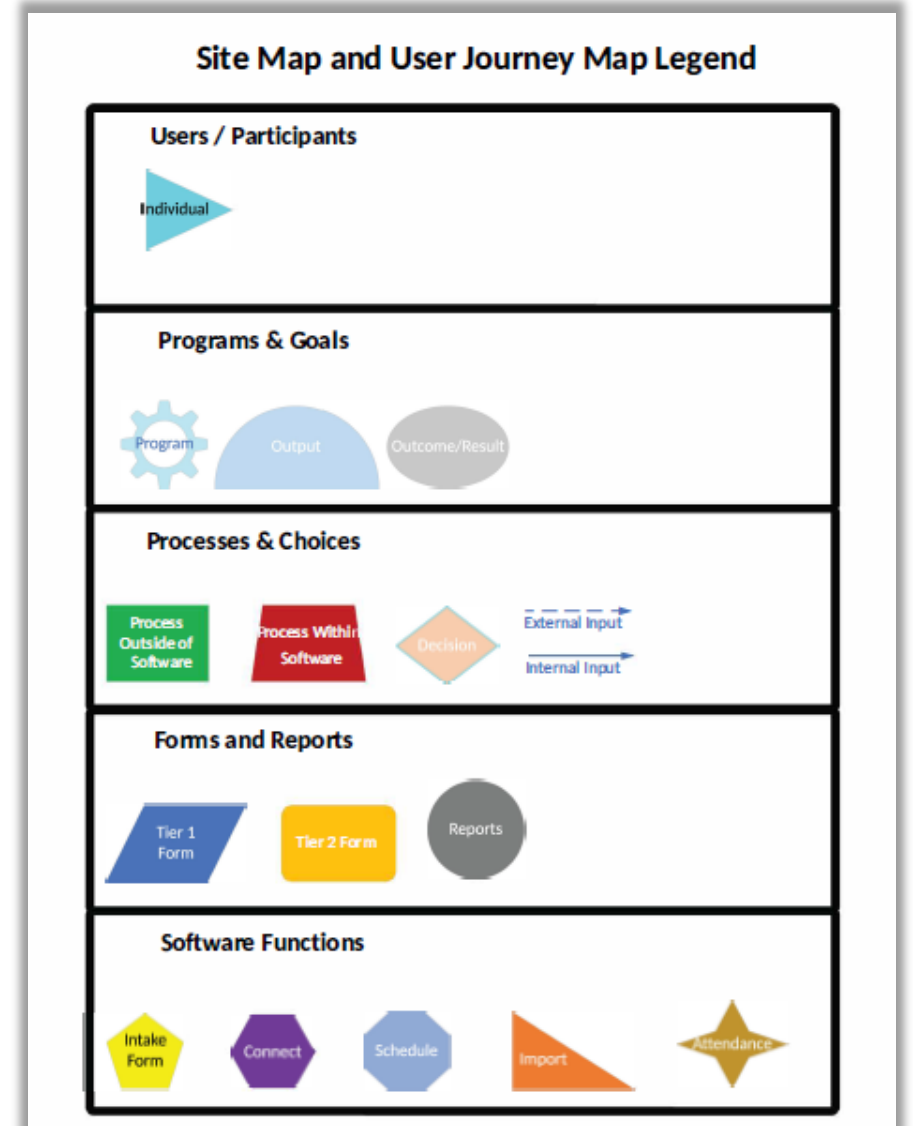
Login

[I've forgotten my username/password](#)

 Save for later

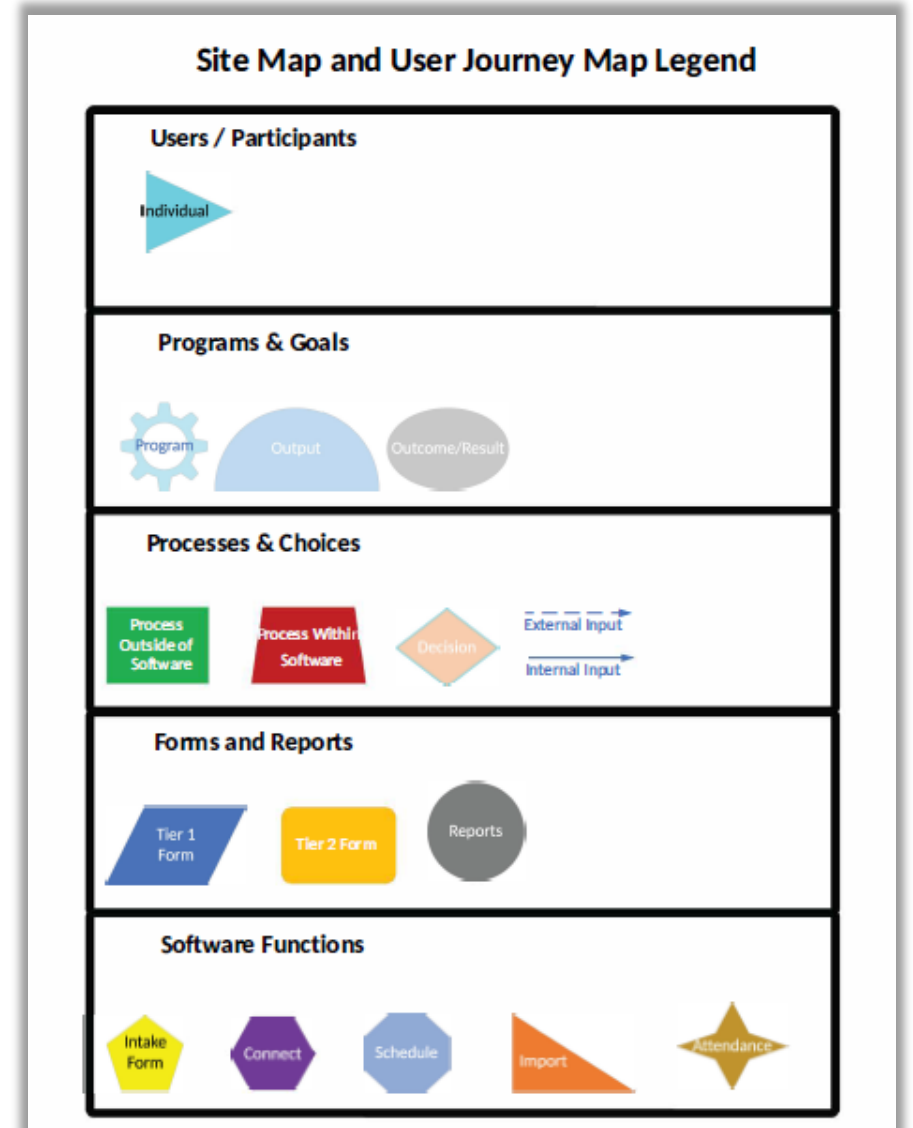
Work with Project Manager

- Fine tune your design



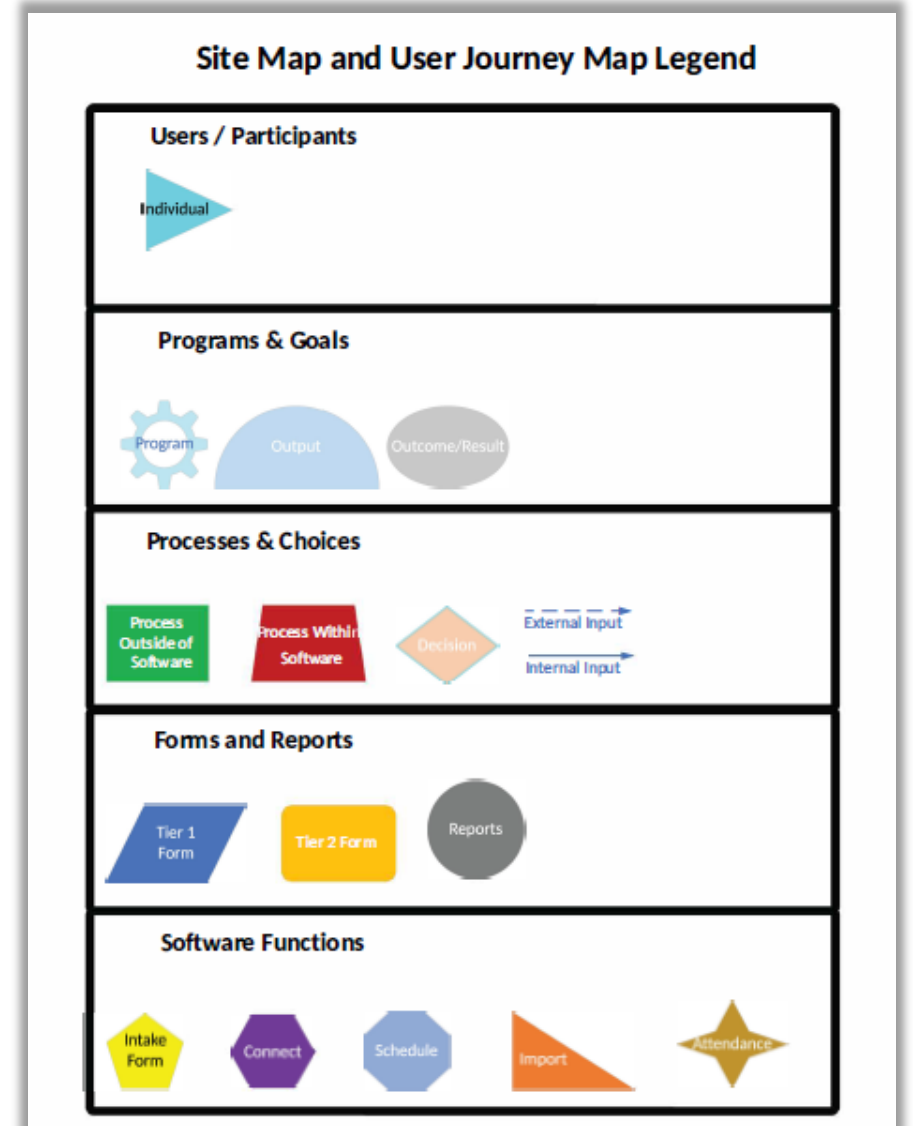
Work with Project Manager

- Fine tune your design
- Sharing S.O.P.s & giving feedback



Work with Project Manager

- Fine tune your design
- Sharing S.O.P.s & giving feedback
- Designing forms or reports*



Prepping for Launch


- Defining Staff Access

The screenshot shows a mobile application interface for managing 'Team Members'. At the top, there is a back arrow and the title 'Team Members'. Below the title are two tabs: 'DETAILS & PERMISSIONS' (which is selected and underlined) and 'ASSIGNED USERS'. The main content area is divided into two sections. The first section, 'Role Details', contains two input fields: 'NAME' with the value 'Team Members' and 'DESCRIPTION' with the value 'Job Coaches, Caseworkers'. The second section, 'Permissions', is currently empty.

Prepping for Launch

- Defining Staff Access
- Creating User Accounts

Add New User



User Details * Required

EMAIL *

FIRST NAME *

LAST NAME *

USER TYPE *

Administrator Standard

SELECT THE SITE(S) WITH WHICH THIS USER SHOULD BE ASSOCIATED... *

Prepping for Launch

- Defining Staff Access
- Creating User Accounts
- Training Staff

Custom End User Training (CEUT)

🕒 3 hr

This Custom Training will prepare your team of End Users to incorporate Apricot Software in their day-to-day duties and review the data entry process as it relates to Apricot for one program.

Please select a date and time for you and your team to attend a Training Session. A Trainer will follow up via email with a Training Proposal and a link to register up-to 15 Individuals.

Again... this is not a 1:1 Meeting. The date you select will be the date and time for your live training. make a selection that is good for your

[Cookie settings](#)

Select a Date & Time

June 2023

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	

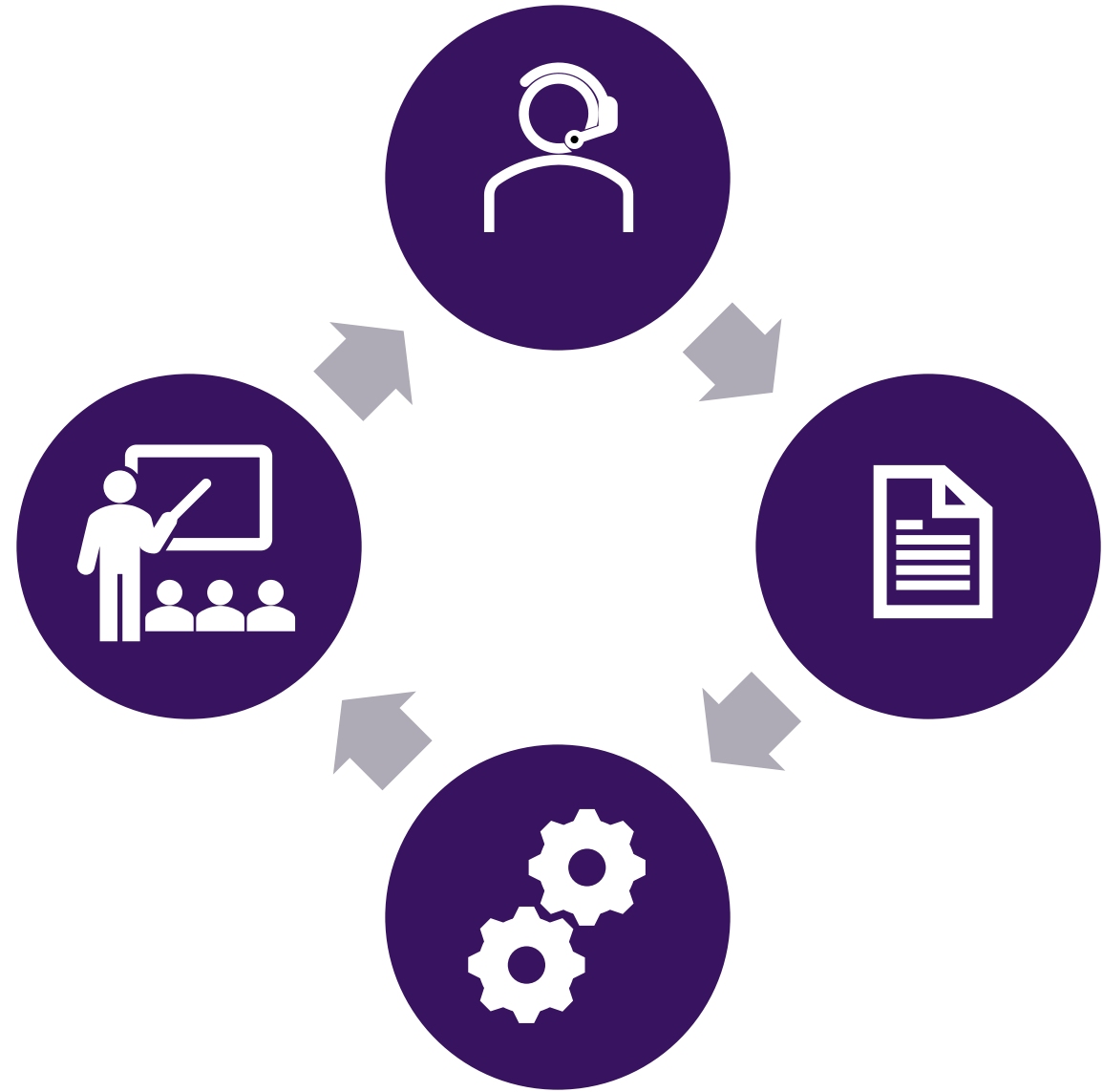
Time zone
🌐 Eastern Time - US & Canada (2:49pm) ▼

POWERED BY Calendly

Admin Duties After Go Live

Duties After Go Live

- Supporting Staff
- Managing Records
- Modifying Your Design
- Training New Users



Supporting Staff

- Updating Access
- Answering Questions
- Liaison with Support

Need Help ? ▾ Announcements

Welcome to our Case Management System!

If you have questions or need assistance please take the following steps:

Step 1
Review the FAQ form in the Support category of our Shared files area of the Software by [Clicking Here](#) or opening the FAQ Document in the Shared Files.

If the FAQ document does NOT address your needs continue to step 2.

Step 2
Email us at datasupport@gmail.com

Please include the following in your email:

- Name of the feature or form you're using
- Error message if any and the steps you took leading up to the error.
- Screen shot of issue

If you simply have requests, suggestions and or recommendations that can make the system easier to use please submit them by [clicking here](#) to complete our suggestions form.

Supporting Staff

- Audit Report
- Reminders to Log In
- Reminders to complete specific forms

Record Audits

Filters Reset Filters

User Filter

--All Programs--

--All Users--

Action Filters

- Record Created
- Record Saved No Changes
- Record Modified
- Record Archived
- Modified via Upgrade Script
- Created via Upgrade Script
- Created via View
- Record Created via Batch...
- Record Imported
- Record Updated via Import
- Record Restored
- Record Created via Regis...
- Record Imported (Reverted)
- User logged in
- Owner Changed
- Record Created from Copy
- Record Created in Workflow

Form Filter

--All Forms--

Start Date

End Date

Limit

Managing Records

- Data Integrity Reports
- Refresher Trainings

No Initial Assessment COLI

Missing Pre Test ▼

▶ Forms

▼ Filters +

▼ Limit Sections

Report last run May 10th 2023, 3:13 pm
[Click to refresh data](#)

Search Q Displaying 53 of 53 Rows (Expand All Cells)

First ▼	Last ▼	Date of Assessment ▼	Evaluation Type ▼
Alicia	Henry		
Alonzo	LaBatsille		
Alonzo	LaBarca		
Andrew	Jones		
April	Billingslea		
Asher	Billingslea		

Modifying Design

- Modify existing Forms
- Create or Modify Reports

Pending Inquiries ▼ Bulletin with Report Example

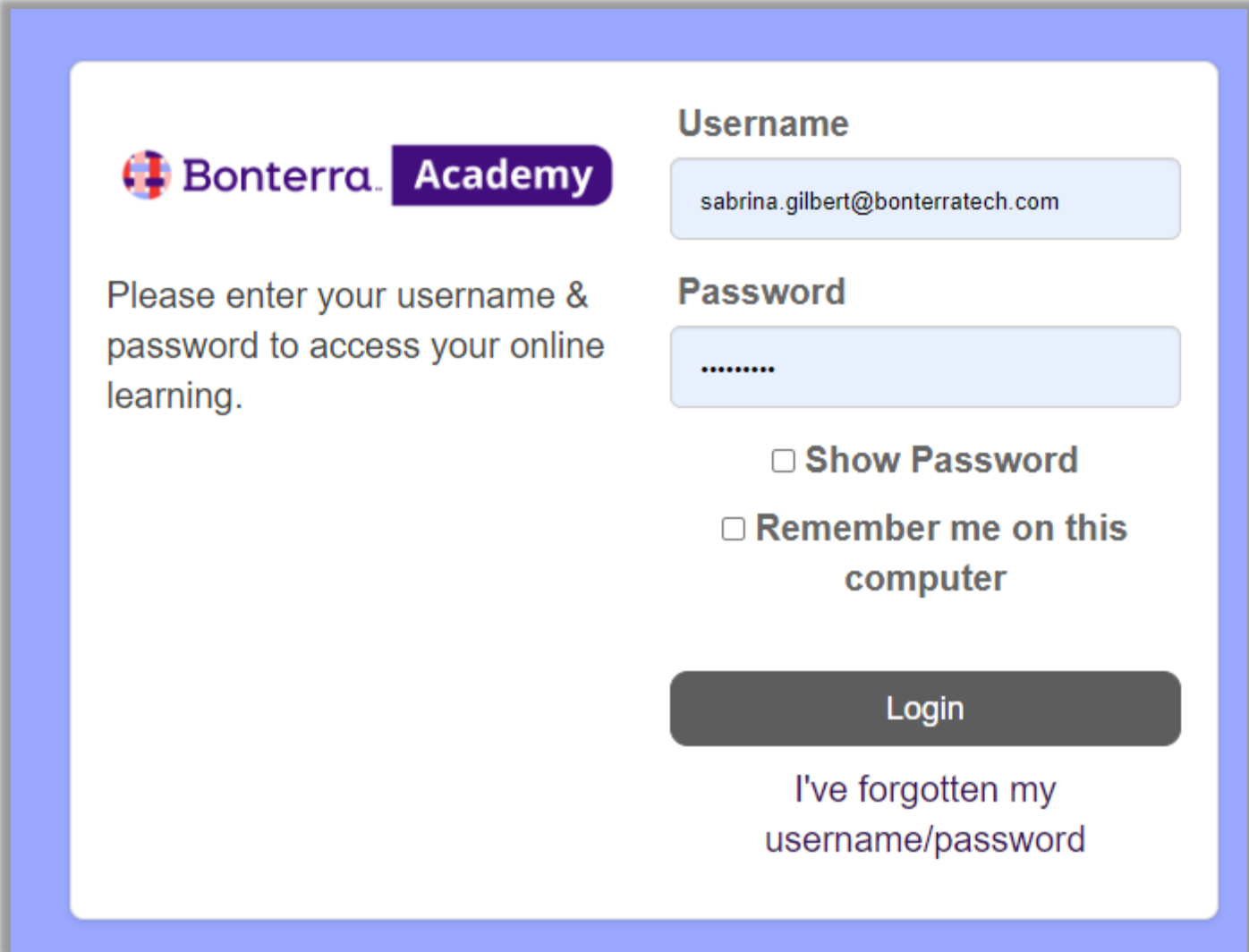
Pending Inquiries
Report last run May 10th 2023, 3:09 pm
[Click to refresh data](#)

Search Displaying 11 of 11 Rows (Expand All Cells)


First	Last	Client Phone Number	Client Email	Client Status
Alvy	Singer	512.454.5454.	alvy.singer@gmail.com	pending
Ashton	Carter	...	ashton@mymail.com	pending
Chris	Batten	...	cb1109@mymail.com	Pending
Elizabeth	Aquino	212.982.2622.	lizrules@mymail.com	Pending
Evan	Anderson	917.181.1525.	evana@mymail.com	Pending
Felicia	Batten	212.928.2726.	battenf@mymail.com	Pending
Heather	Carter	410.918.1716.	heatherc@officemail.com	Pending

Training New Users

- New Hires
- Bonterra Academy
- Walk through your system



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Password

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Show Password

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Login

[I've forgotten my username/password](#)

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.