# Apricot
# Becoming a Strong Admin

We will begin shortly!

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# Meet Your Trainer

Jaime Ransom

Training & Development Associate

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# Learning Objective

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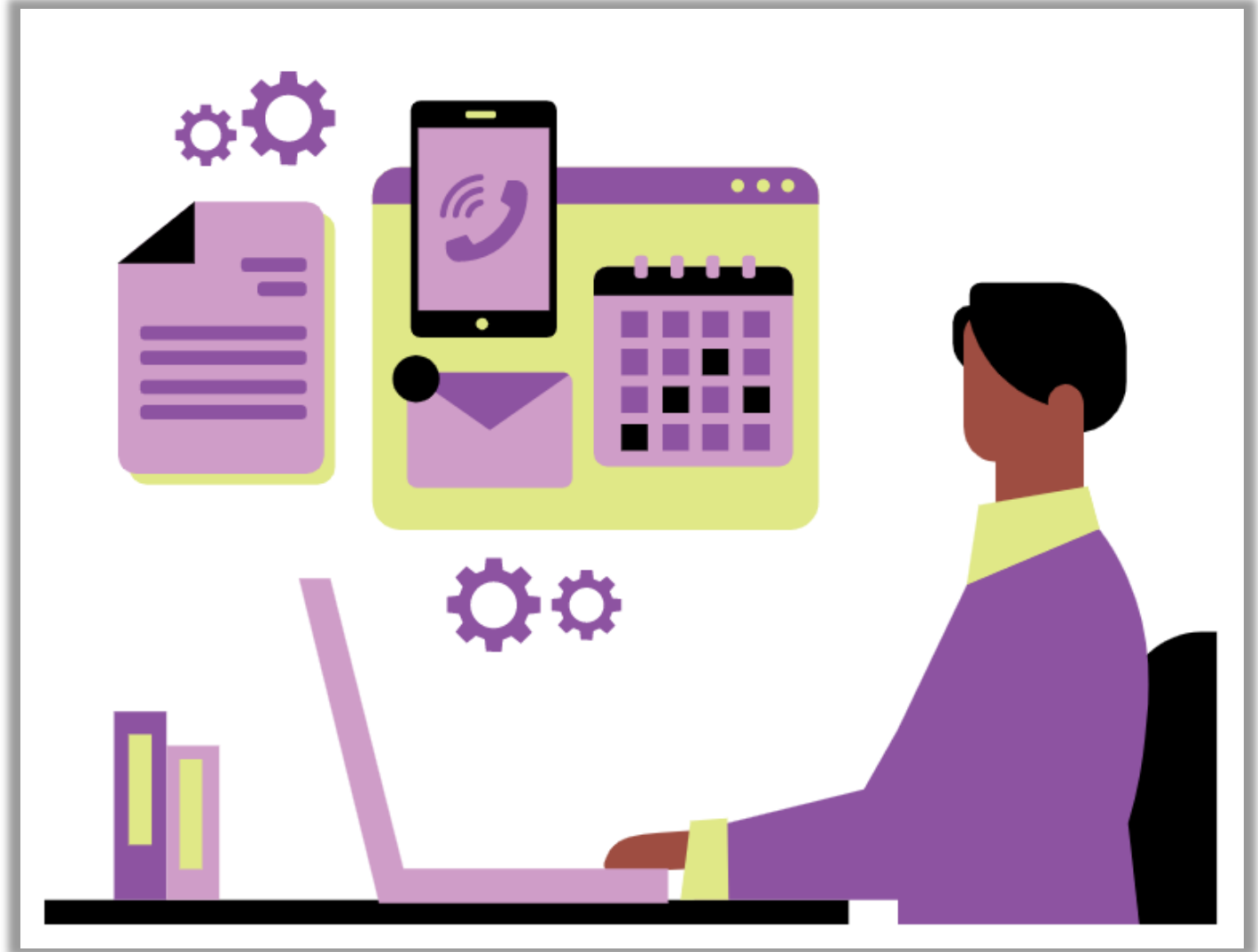
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# Agenda

Role Of An Administrator

Admin Duties In Implementation

Admin Duties After Go Live

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# Role of an Administrator

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# Role of an Administrator

- Access to Data Entry & Design Tools.

- Defines what users can see

- Support users

- Can have 2 people fill this role
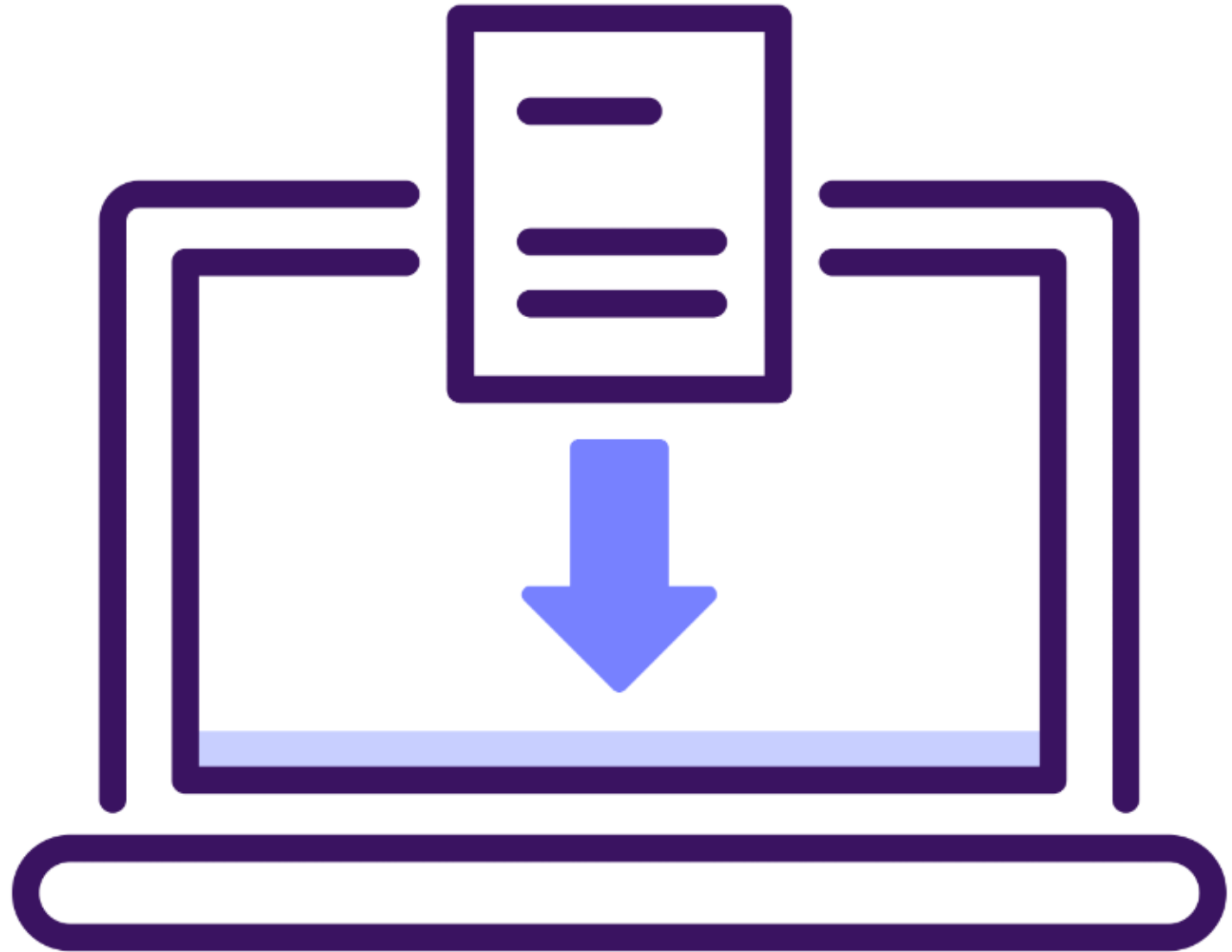


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# Role of an Administrator

Two Phases
1. Implementation
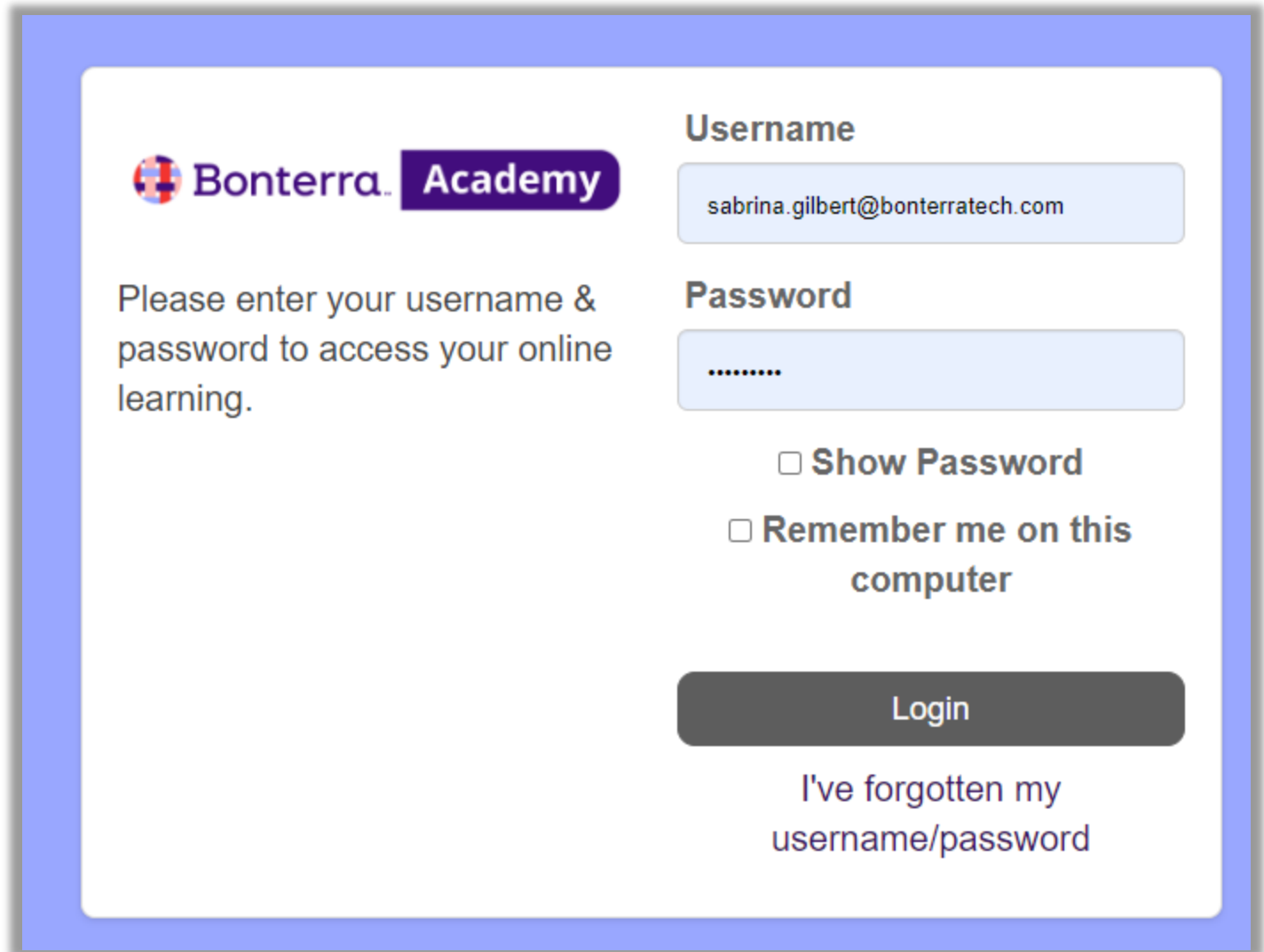
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# Role of an Administrator

Two Phases

1. Implementation
2. Tracking Live Cases

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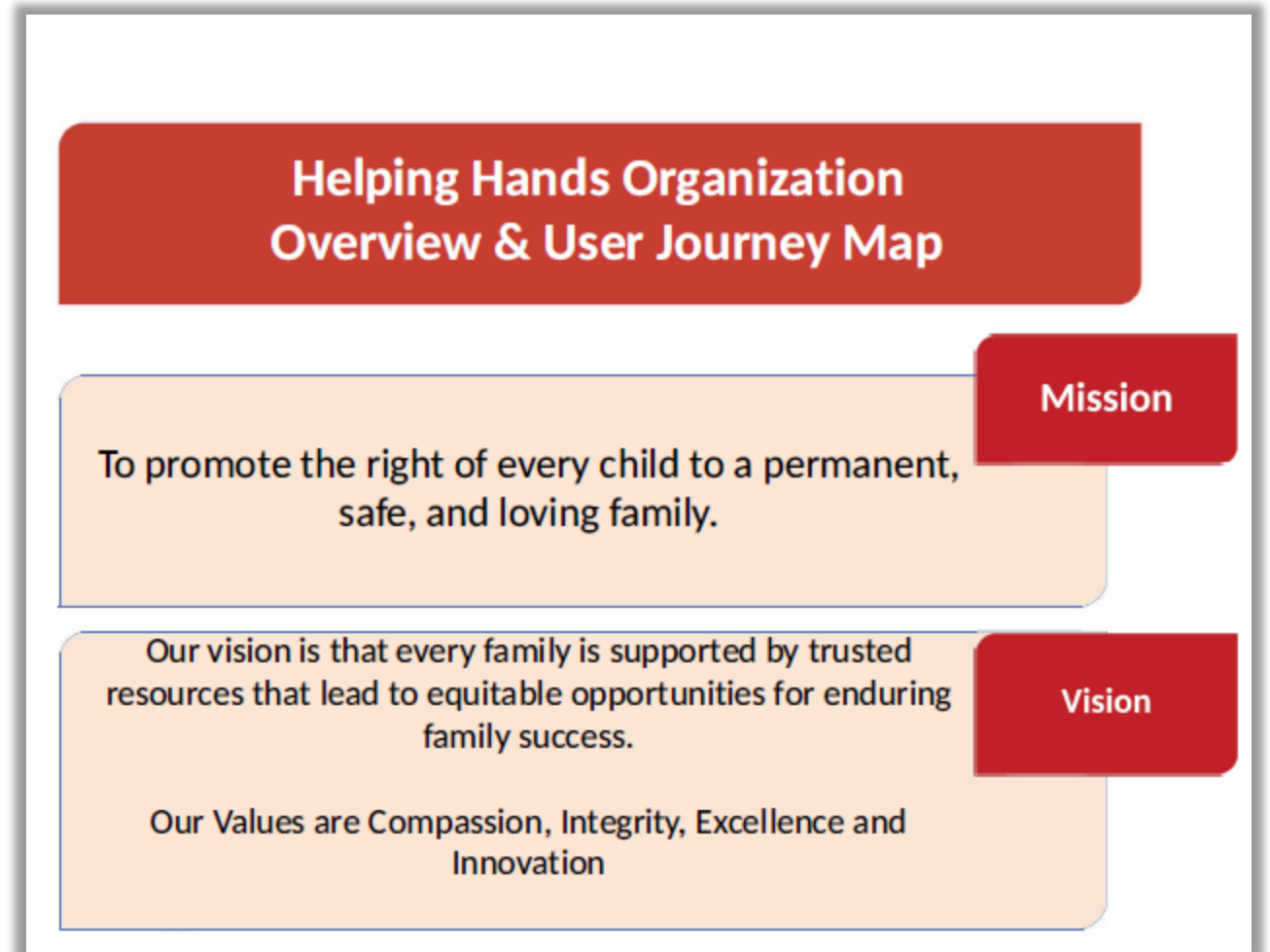# Admin Duties During Implementation

# During Implementation

- Learn the software

# During Implementation

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

**Helping Hands Organization Overview & User Journey Map**

**Mission**

To promote the right of every child to a permanent, safe, and loving family.

**Vision**

Our vision is that every family is supported by trusted resources that lead to equitable opportunities for enduring family success.

Our Values are Compassion, Integrity, Excellence and Innovation
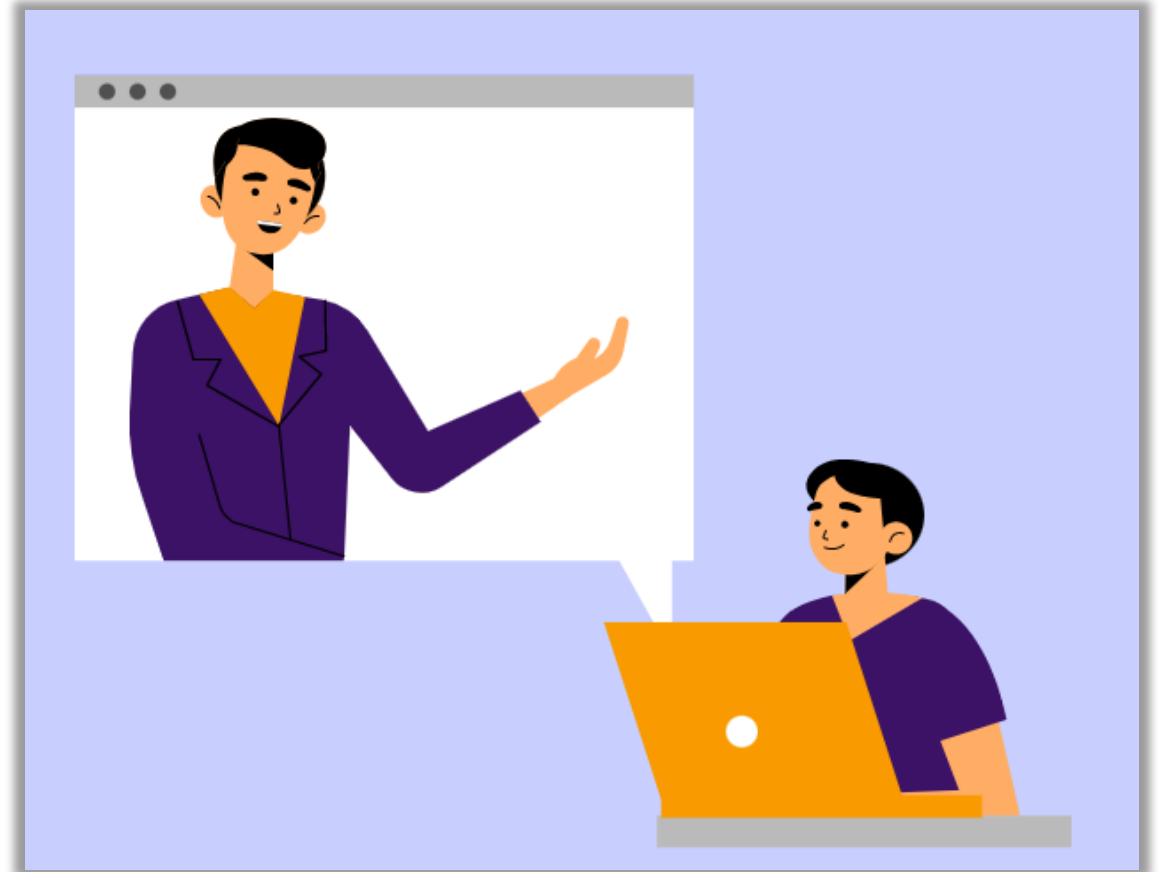
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# During Implementation

- Learn the software

- Work with your Project Manager on design

- Prepare for Launch



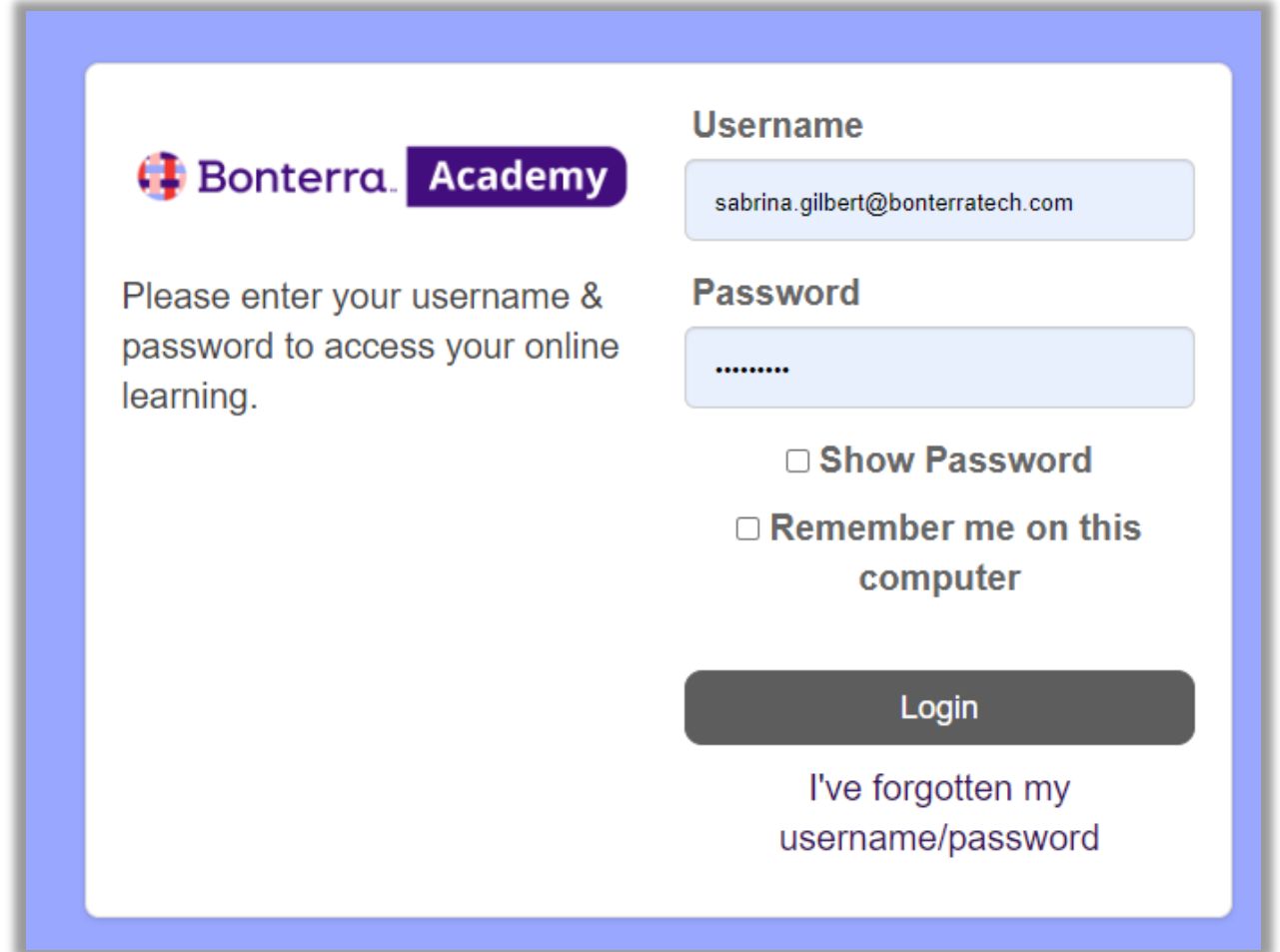Bonterra™

# Learn the Software

- Data entry & Admin functionality

- Informed decisions

- Ensures design best meets your organization's needs



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# Learn the Software

## Suggested Learning Path

1. Apricot 101, 201, 301



Save for later

# Learn the Software

Suggested Learning Path

1. Apricot 101, 201, 301

2. Administrator Features in Bonterra Academy



Save for later

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# Learn the Software

Suggested Learning Path

1. Apricot 101, 201, 301

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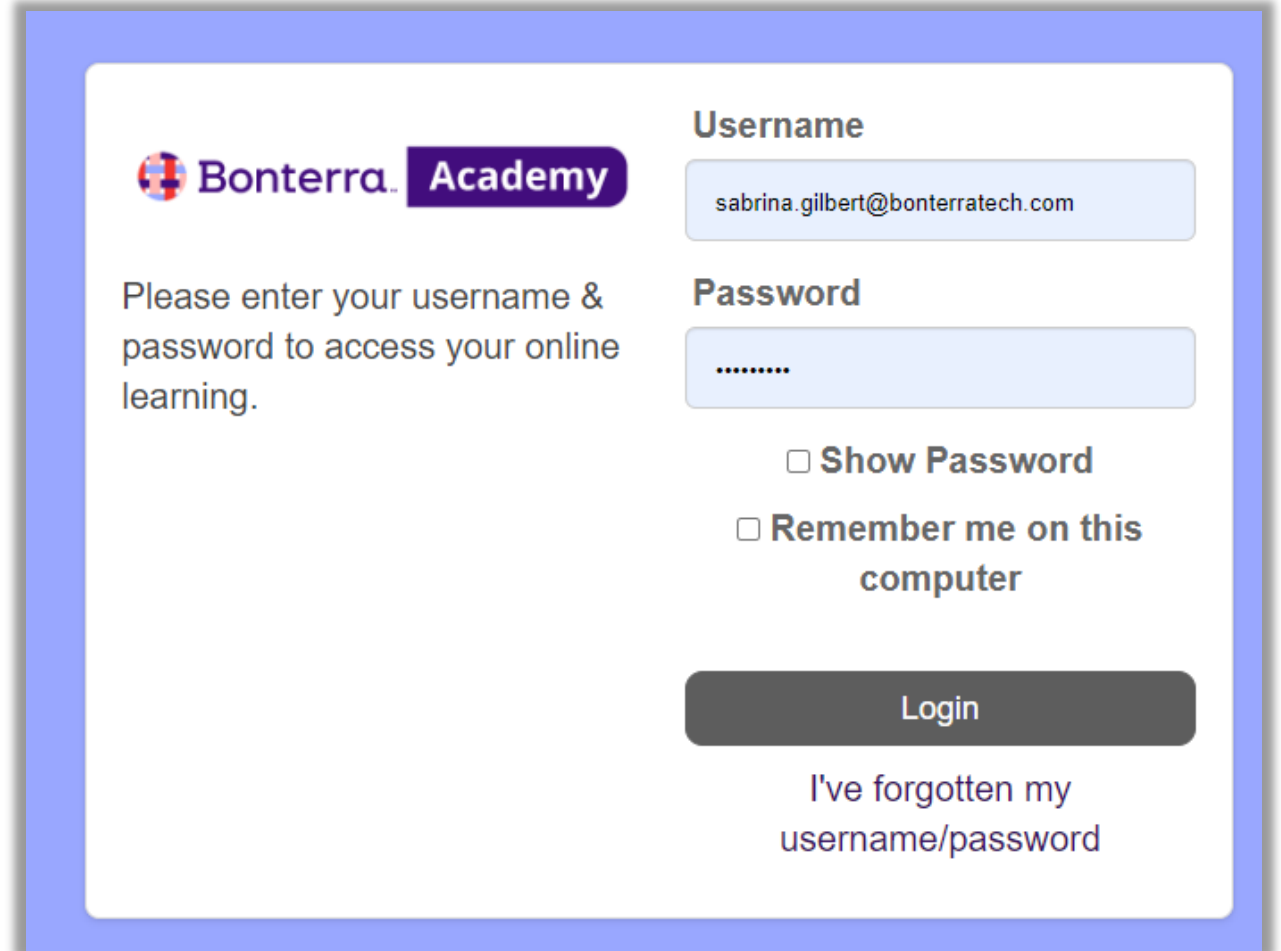
3. Register for Free account (link in chat)
   1. Code; CORE ADMIN



Save for later

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# Work with Project Manager

- Fine tune your design



**Site Map and User Journey Map Legend**

Users / Participants
- Individual

Programs & Goals
- Program
- Output
- Outcome/Result

Processes & Choices
- Process Outside of Software
- Process Within Software
- Decision
- External Input
- Internal Input

Forms and Reports
- Tier 1 Form
- Tier 2 Form
- Reports

Software Functions
- Intake Form
- Connect
- Schedule
- Import
- Attendance

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# Work with Project Manager

- Fine tune your design

- Sharing S.O.P.s & giving feedback



**Site Map and User Journey Map Legend**

**Users / Participants**
Individual

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Process Outside of Software · Process Within Software · Decision · External Input · Internal Input

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Tier 1 Form · Tier 2 Form · Reports

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Intake Form · Connect · Schedule · Import · Attendance
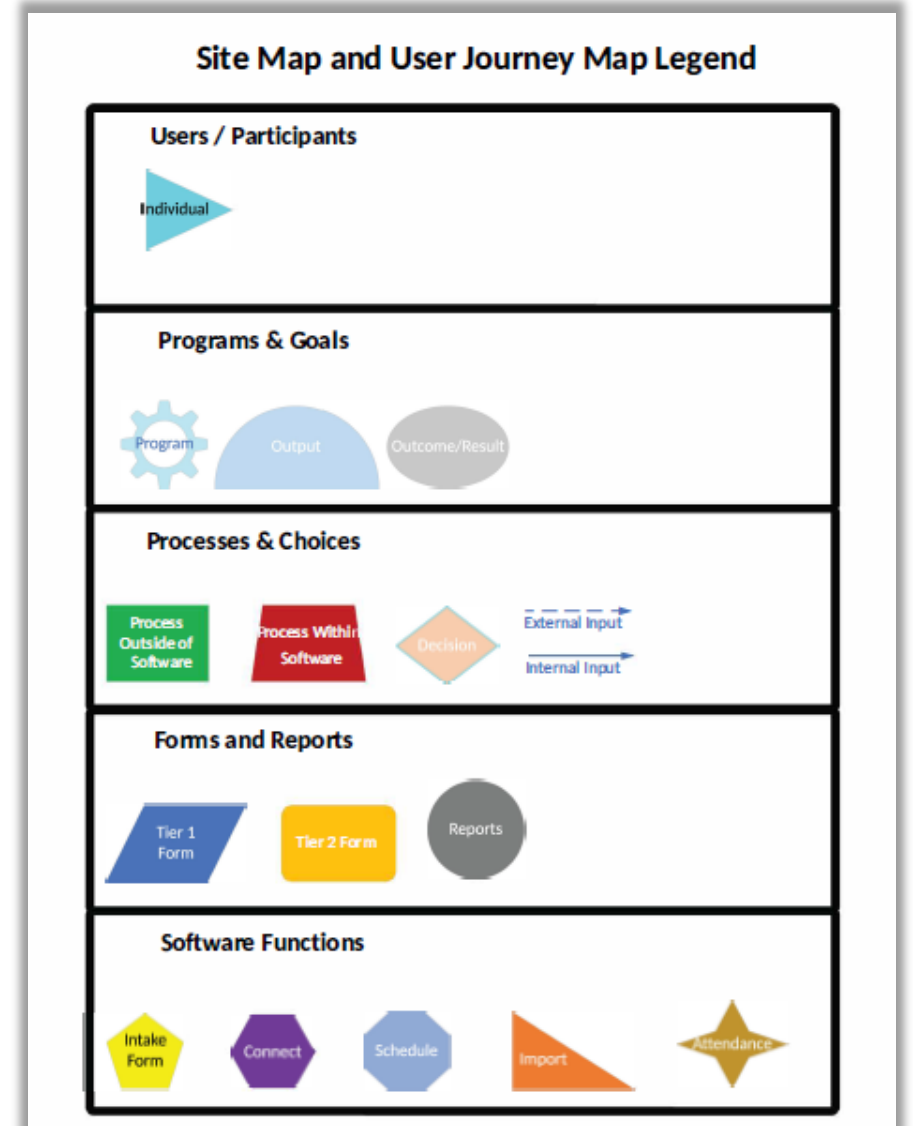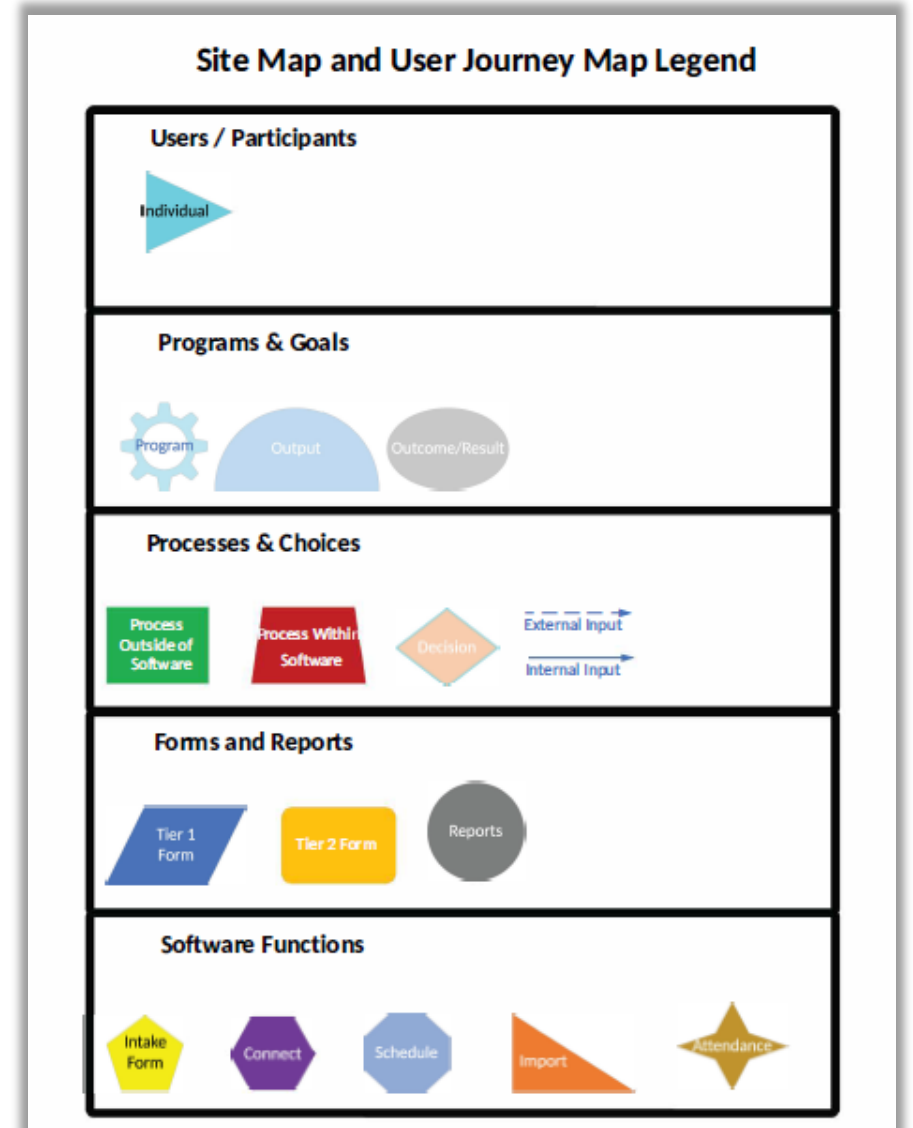
# Work with Project Manager

- Fine tune your design

- Sharing S.O.P.s & giving feedback

- Designing forms or reports*



Site Map and User Journey Map Legend

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# Prepping for Launch

- Defining Staff Access

# Prepping for Launch

- Defining Staff Access
- Creating User Accounts

# Prepping for Launch

- Defining Staff Access
- Creating User Accounts
- Training Staff



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# Admin Duties After Go Live

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# Duties After Go Live

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



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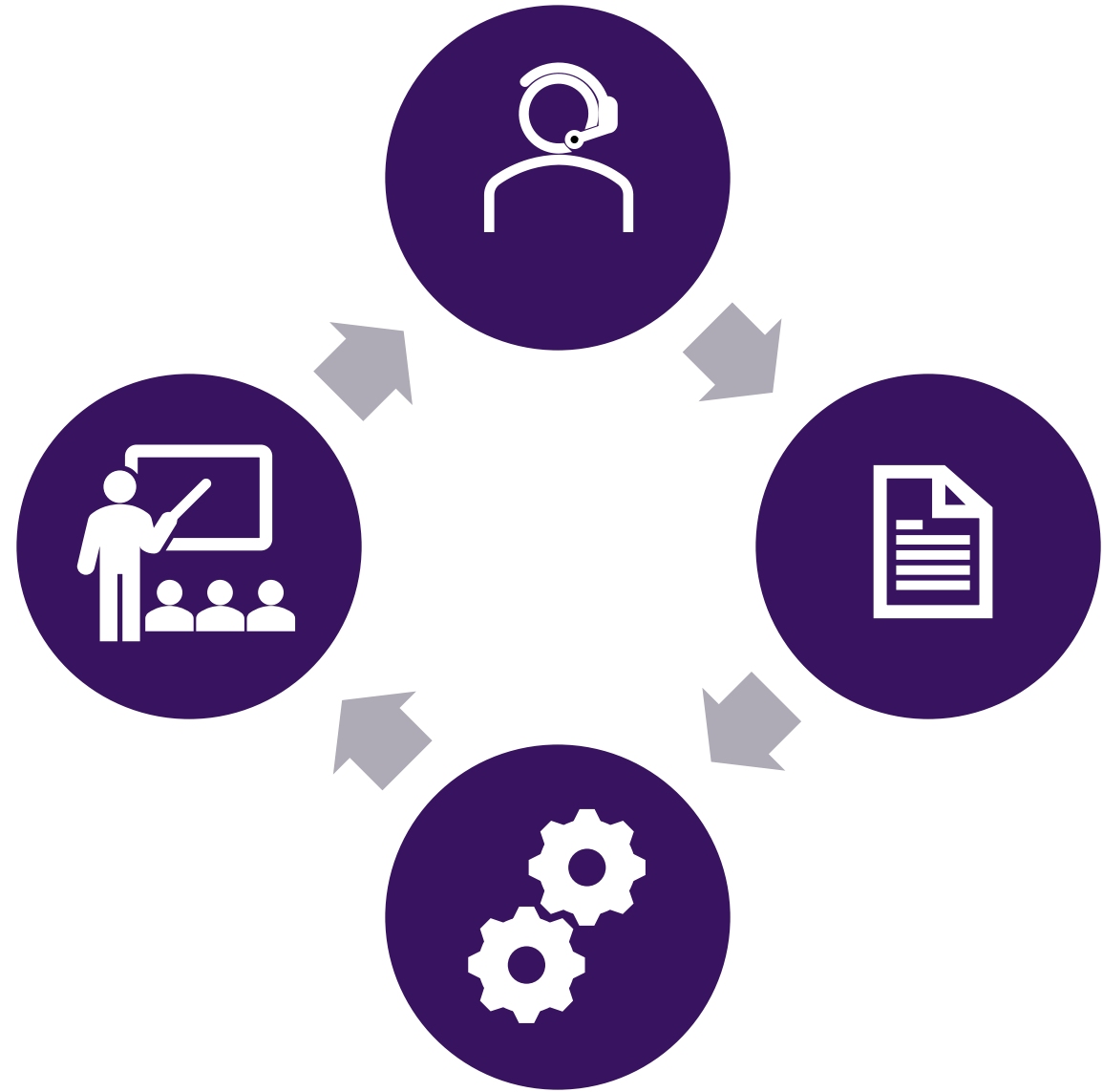
# Supporting Staff

- 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:*

<u>Step 1</u>
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.*

<u>Step 2</u>
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.

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# Supporting Staff

- Audit Report

- Reminders to Log In

- Reminders to complete specific forms

## Record Audits

### Filters

Reset Filters

**User Filter**

--All Programs-- ⌄

--All Users-- ⌄

**Form Filter**

--All Forms-- ⌄

**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

**Start Date**

04/17/2012

**End Date**

05/10/2023

**Limit**

100

Search

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# Managing Records

- Data Integrity Reports
- Refresher Trainings

# Modifying Design

- Modify existing Forms

- Create or Modify Reports



**Pending Inquiries** ▼                                    Bulletin with Report Example
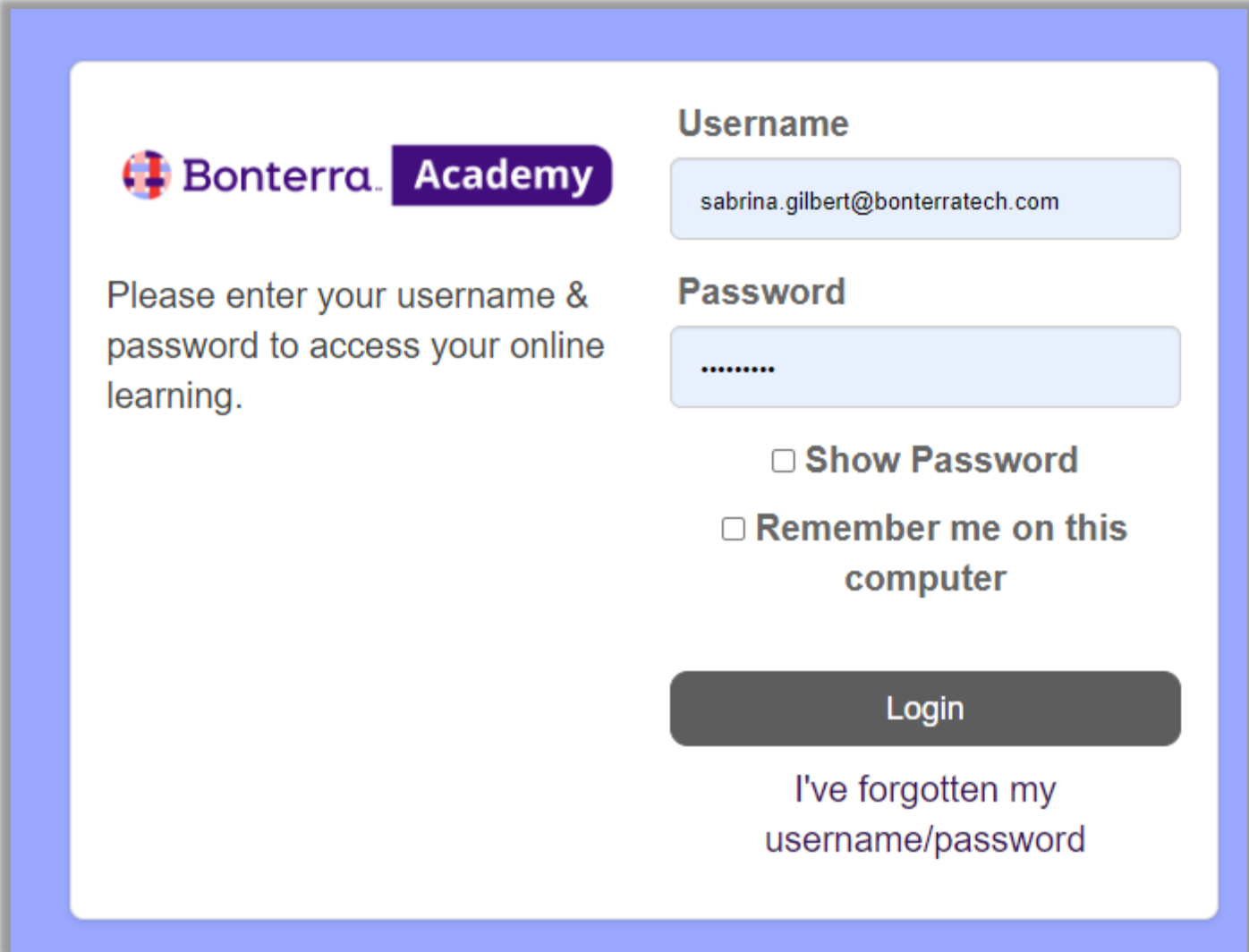
Pending Inqueries
Report last run May 10th 2023, 3:09 pm
Click to refresh data

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@officeemail.com | Pending |

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# Training New Users

- New Hires
- Bonterra Academy
- Walk through your system

# 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!

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# 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

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# 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!



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Thank you for attending!

We hope to see you
in future trainings.

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