Apricot
Managing User Access Webinar

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Meet Your Trainer

First Name Last Name

Training & Development Associate

Learning Objective

Provide foundational understanding of how to manage user access using the Roles feature in the software so that Administrators can streamline the user's experience in accordance with their unique duties and responsibilities in the software.

Agenda

- What are Roles
- Managing Existing Roles
- Creating New Roles
- Assigning Roles to Users

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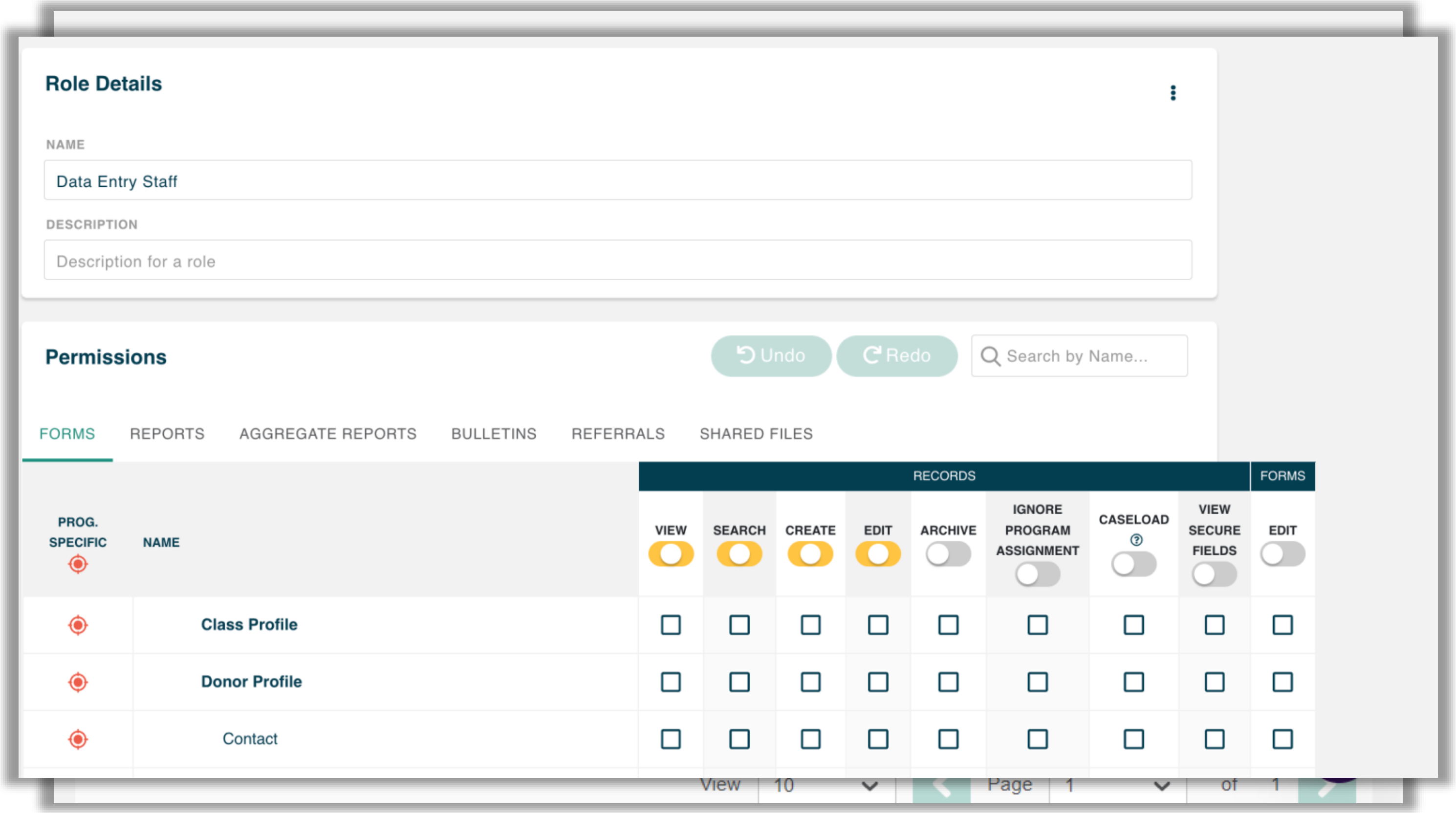
What Are Roles

What are Roles?

- Indicate what features should be available
  - Forms
  - Reports
  - Bulletins
  - Referrals
  - Shared Files
- Indicate what action users should be able to take with those features
- Can have multiple roles
- Single Role can be used across different job titles with similar duties.



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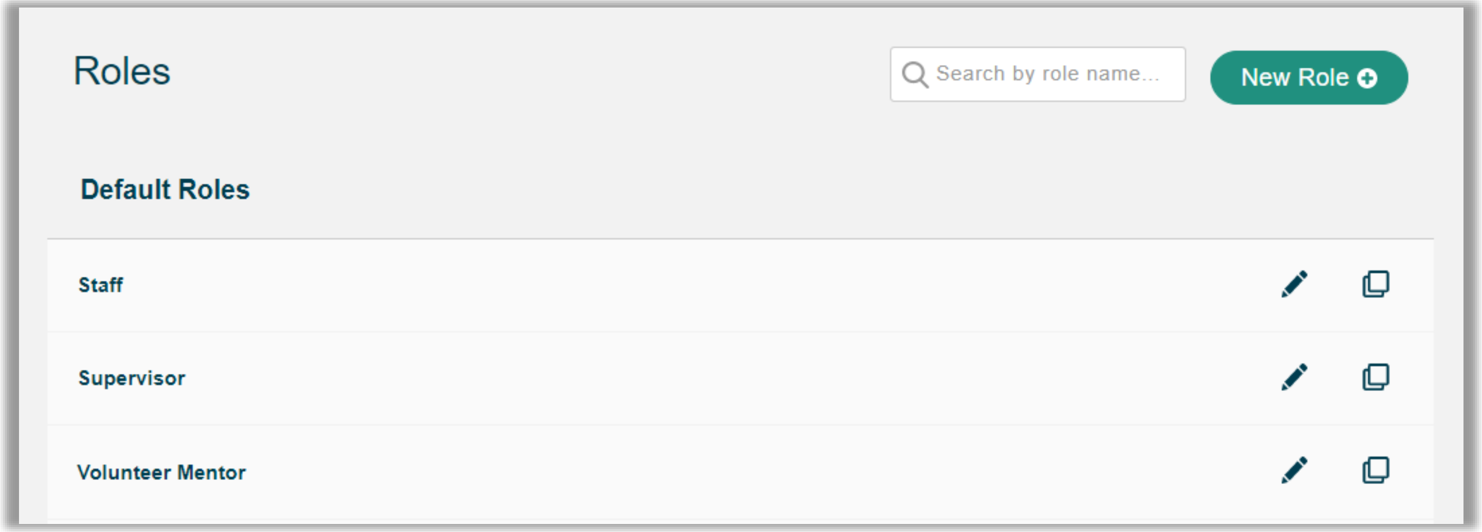
Managing Existing Roles

Managing Existing Roles

- 4 Default Roles
  - Staff
  - Supervisor
  - Volunteer Mentor
  - Interns
- Rename
- Change Permission settings
- Copy as template for additional role



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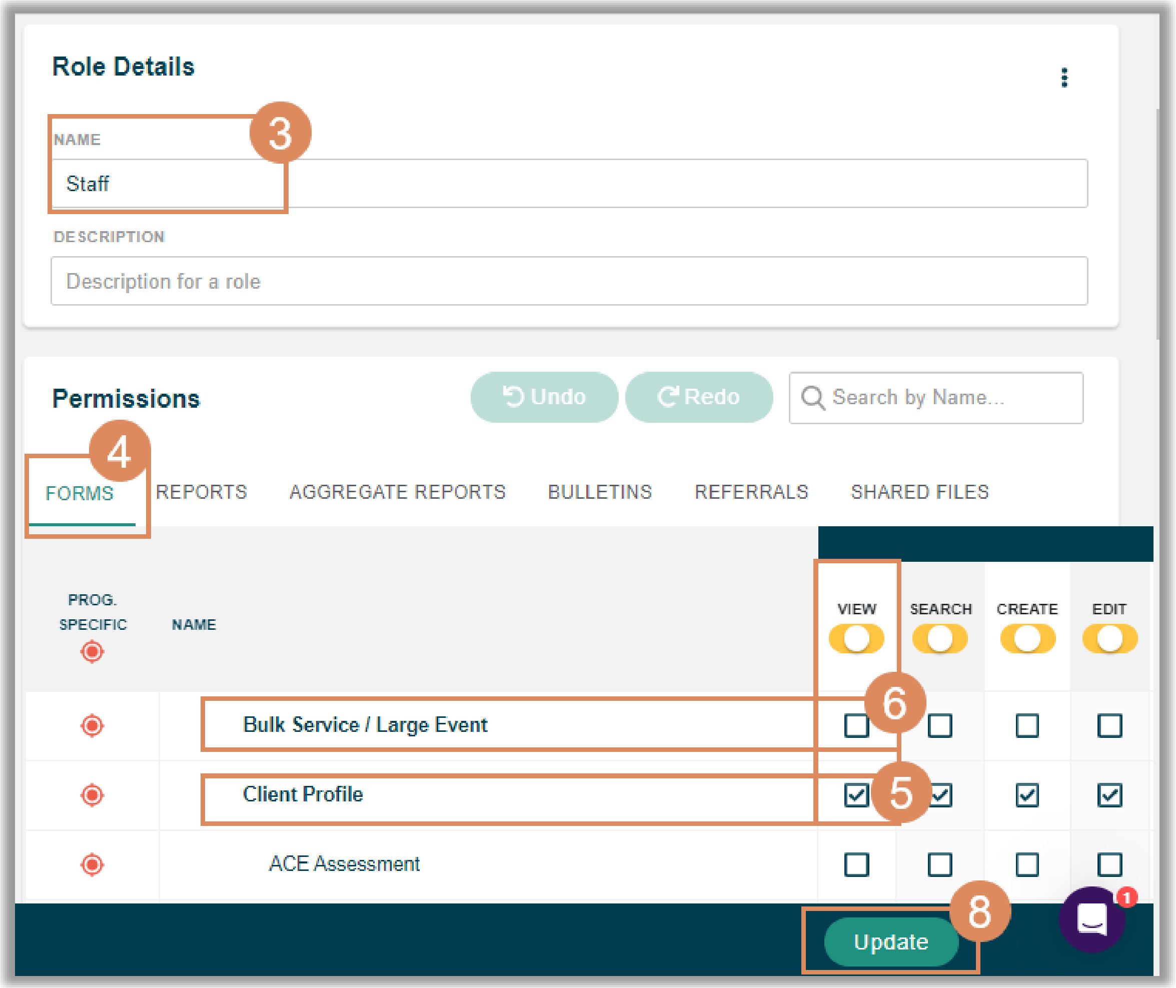
Managing Existing Roles

Steps to Modify Existing Role

1. Administrator Tab > Access Control> Sites & Programs > Roles
2. Click the Pencil icon next to the desired role
3. Change name of the Role (if desired)
4. View Permissions for each feature one tab at a time
5. Check the box in the action column to grant users with this role access to that that action with that feature.
6. Uncheck the box of an action column to remove access to take that action with that feature for users assigned to this role.
7. Repeat steps 4 – 6 for remaining tabs.
8. Click Update



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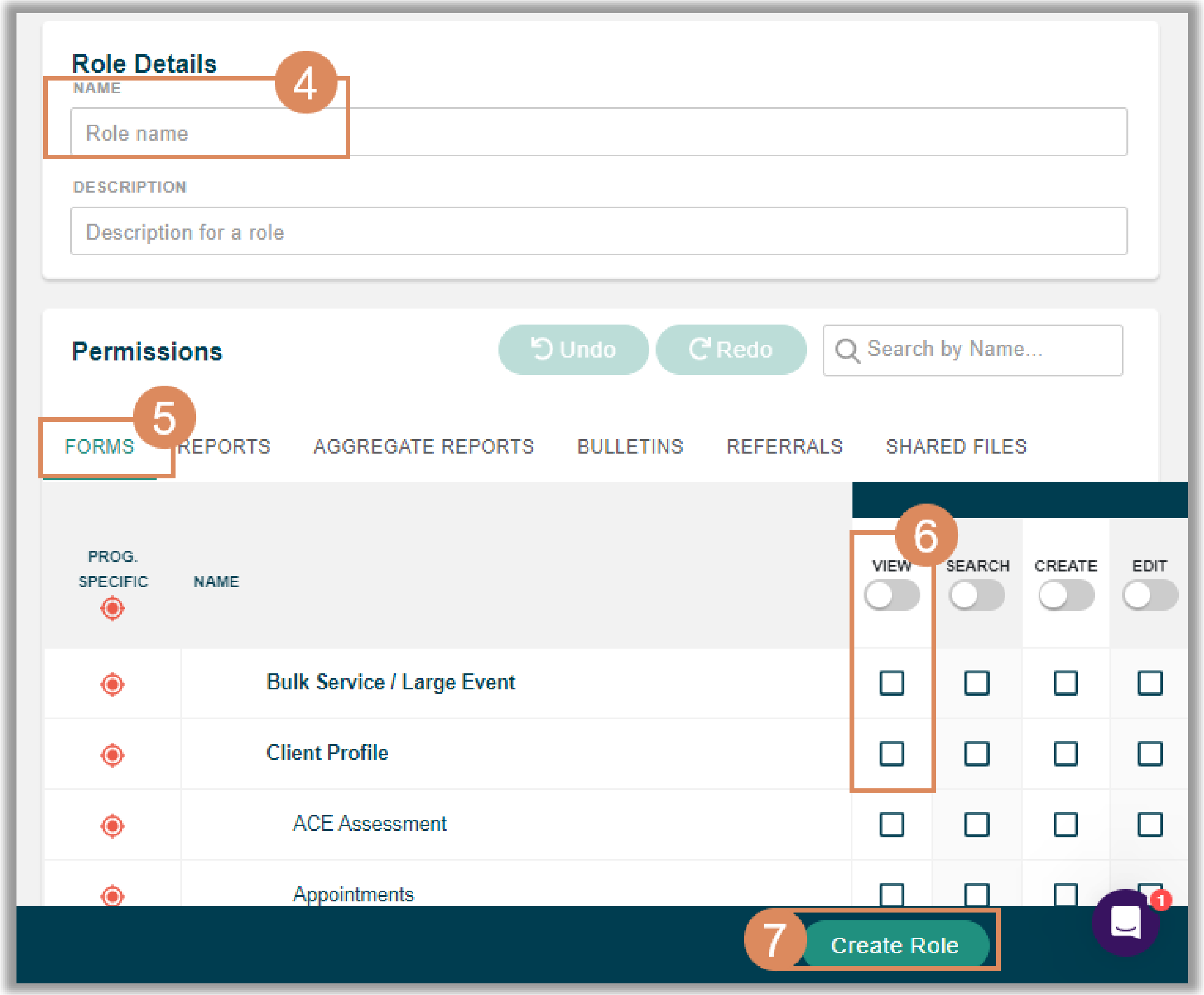
Creating New Roles

Creating New Roles

<u>Steps to Create Roles</u>

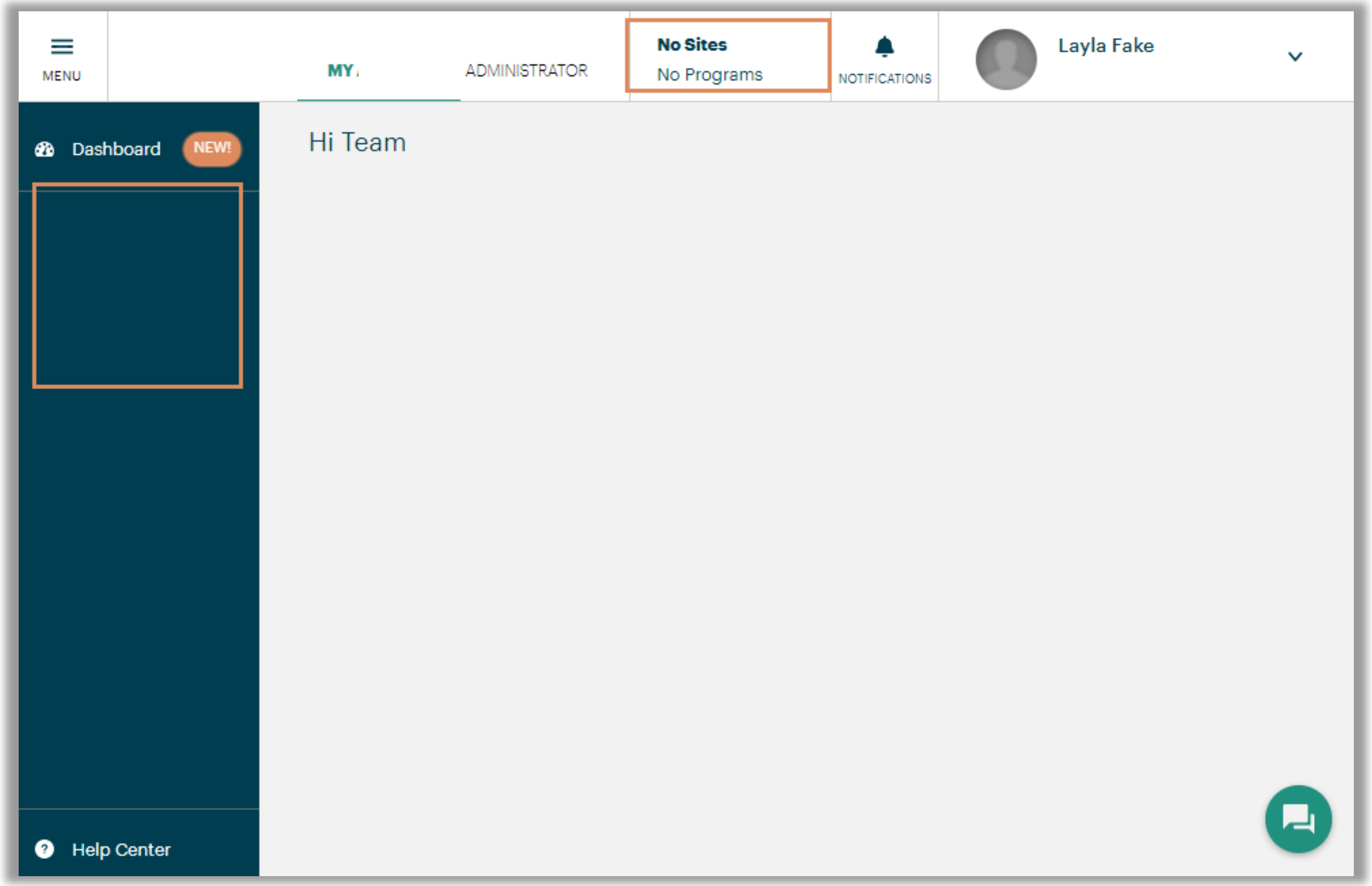
1. Administrator Tab > Access Control > Sites & Programs
2. Click Roles
3. Click New Role
4. Name your Role
5. Enable desired features one tab at a time
6. Check boxes in action columns to enable that permission to users assigned to this Role.
7. Click Create Role.



Assigning Roles to Users

Assigning Roles to Users

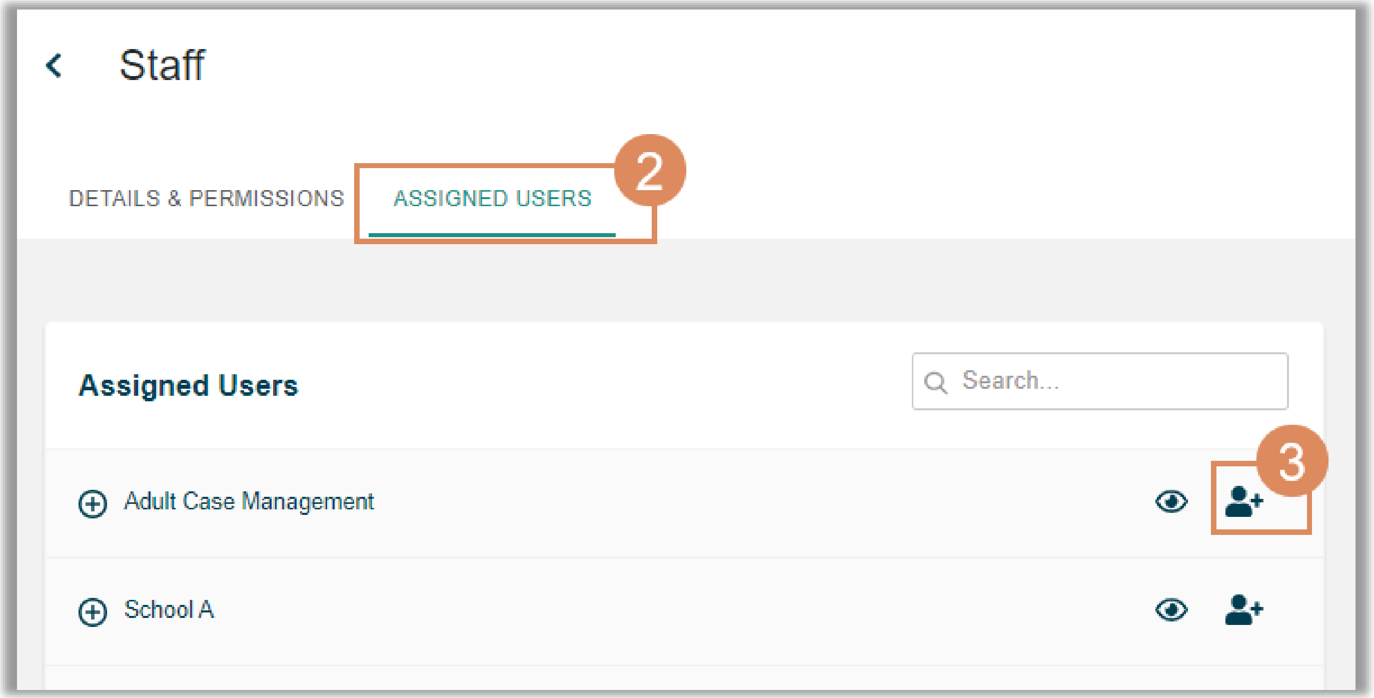
- Must be assigned to both Users and Programs
- Software makes no assumptions
- Skipping this step **restricts access to everything** in the software.



Assigning Roles to Users

Steps to Assign Roles to Existing User Accounts

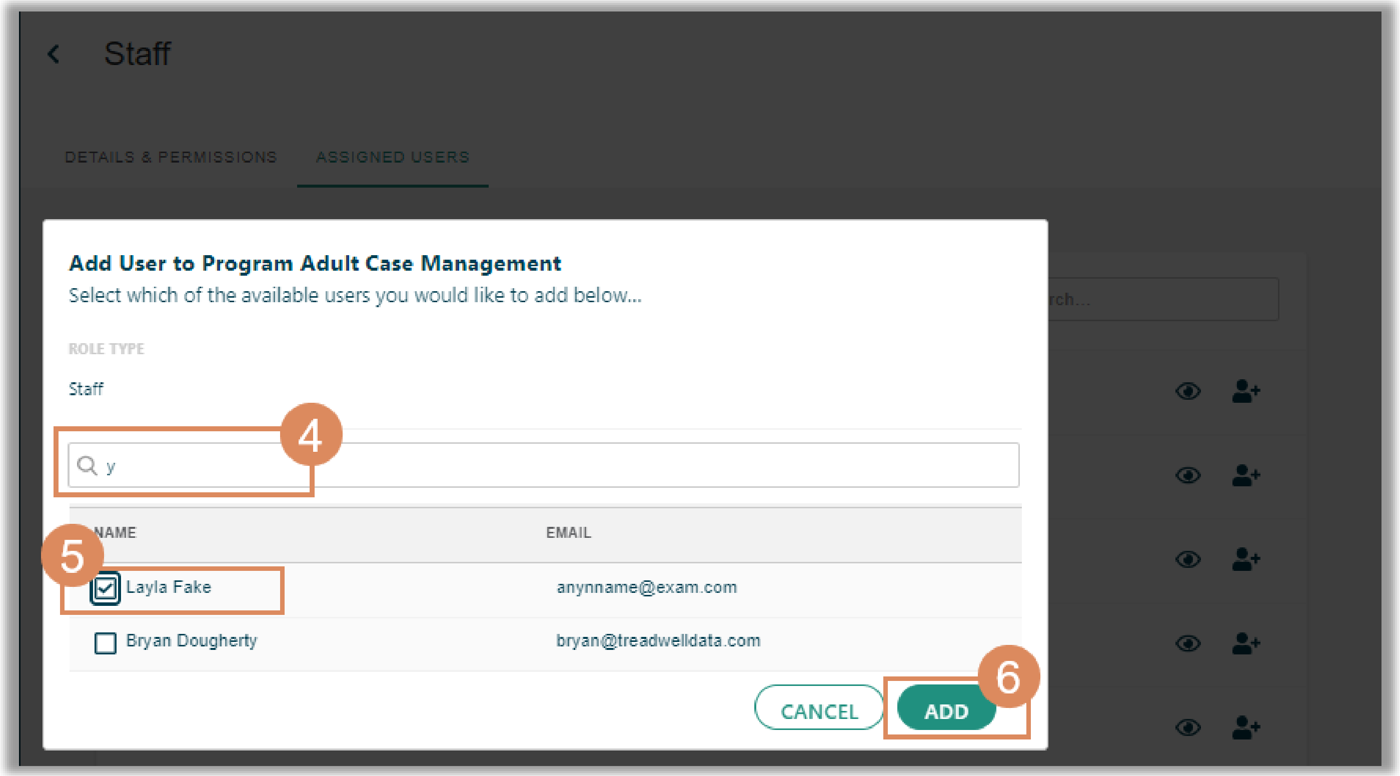
1. Open the desired Role in the edit view from the manage roles page.
2. Click the Assigned Users Tab
3. Click the Add person icon next to the desired program



Assigning Roles to Users

<u>Steps to Assign Roles to Existing User Accounts</u>

1. Open the desired Role in the edit view from the manage roles page.
2. Click the Assigned Users Tab
3. Click the Add person icon next to the desired program
4. Search for the desired user
5. Check the box next to the desired user's name
6. Click Add



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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