

Apricot Managing User Accounts Webinar

Meet Your Trainer

First Name Last Name

Training & Development Associate

Learning Objective

Provide foundational understanding of managing user accounts so that Administrators can confidently create and adjust user accounts as needed.

Agenda

What Are User Accounts

Creating New User Accounts

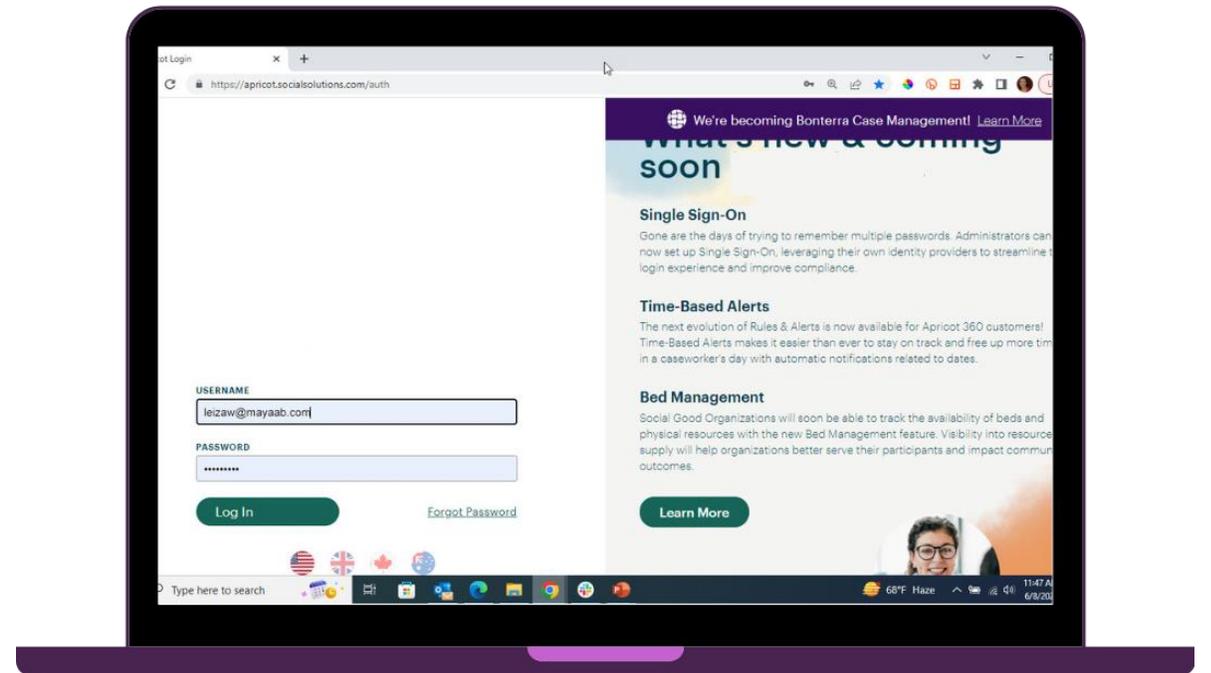
Password Security

Managing Changes

What Are User Accounts

What Are User Accounts

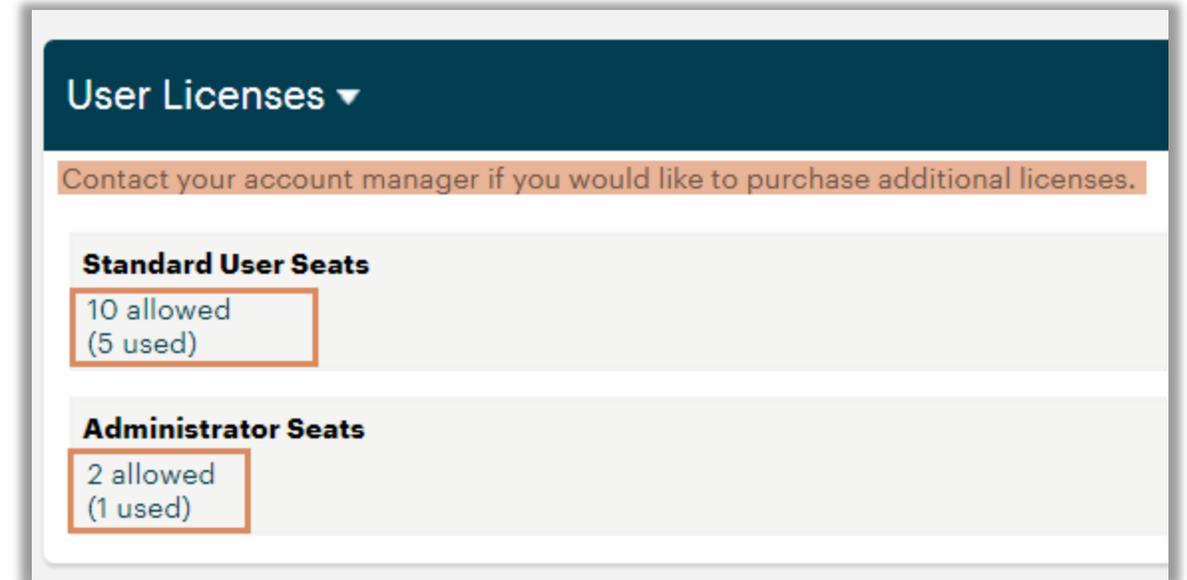
- Allows individuals access to the software
- Requires a username and password
- Must be assigned to a Role & Program



Creating New User Accounts

Creating New User Accounts

- Limited number of user seats available



The screenshot shows a 'User Licenses' section with a dark teal header. Below the header is a light orange banner with the text 'Contact your account manager if you would like to purchase additional licenses.' Underneath, there are two sections: 'Standard User Seats' and 'Administrator Seats'. Each section has a box containing the number of seats allowed and the number of seats used.

License Type	Allowed	Used
Standard User Seats	10	5
Administrator Seats	2	1

Creating New User Accounts

- Limited number of user seats available
- 2 Types: Standard or Administrator

Add New User



User Details * Required

EMAIL *

FIRST NAME *

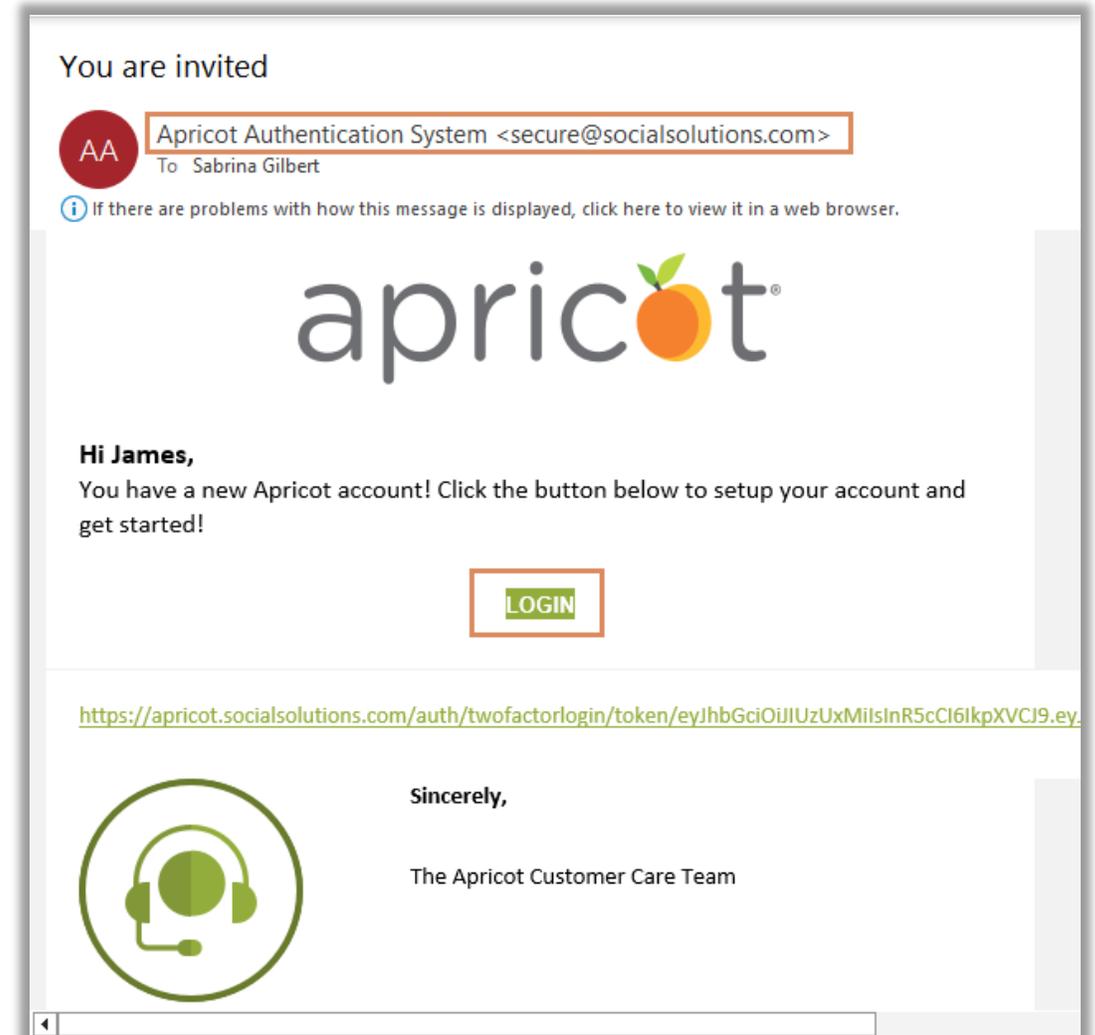
LAST NAME *

USER TYPE *

Administrator Standard

Creating New User Accounts

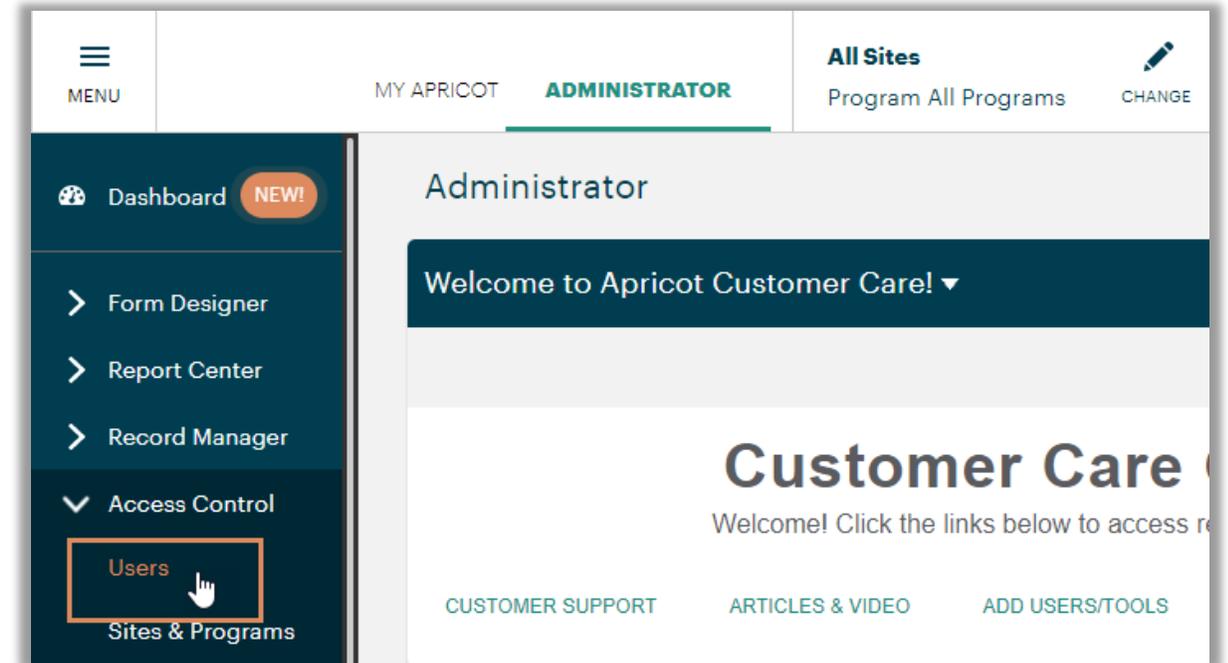
- Limited number of user seats available
- 2 Types: Standard or Administrator
- Login link is emailed to users
 - Link only valid for 30mins*
 - Check junk mail
 - From: secure@socialsolutions.com



Creating New User Accounts

Steps:

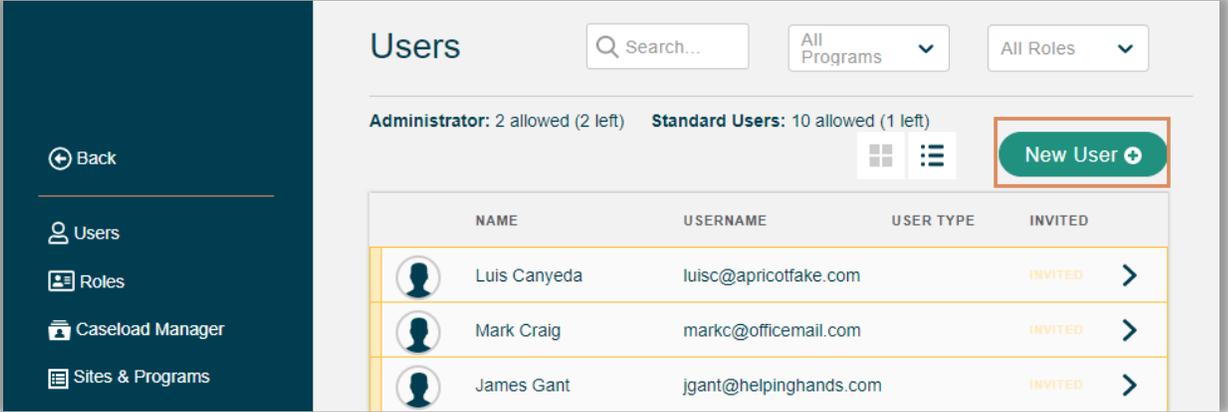
1. Click the Users option under the Access Control option on the left navigation bar



Creating New User Accounts

Steps:

1. Click the Users option under the Access Control option on the left navigation bar
2. Click New User on the right



The screenshot displays the 'Users' management interface. On the left is a dark teal navigation bar with options: Back, Users, Roles, Caseload Manager, and Sites & Programs. The main content area has a header with 'Users', a search bar, and dropdowns for 'All Programs' and 'All Roles'. Below the header, it shows 'Administrator: 2 allowed (2 left)' and 'Standard Users: 10 allowed (1 left)'. A green 'New User +' button is highlighted with a red box. Below this is a table with columns: NAME, USERNAME, USER TYPE, and INVITED.

NAME	USERNAME	USER TYPE	INVITED
Luis Canyeda	luisc@apricotfake.com		INVITED >
Mark Craig	markc@officemail.com		INVITED >
James Gant	jgant@helpinghands.com		INVITED >

Creating New User Accounts

Steps:

1. Click the Users option under the Access Control option on the left navigation bar
2. Click New User on the right
3. Enter the User Details
4. Select the Site the users should have access to
5. Allow Site Administrator Access (if needed)
6. Assign appropriate Roles and Programs
7. Send Invite

The screenshot shows a user creation form with the following sections and steps:

- Step 3: User Details** (Required). Fields include: EMAIL, FIRST NAME, LAST NAME, and USER TYPE (radio buttons for Administrator and Standard).
- Step 4:** A dropdown menu labeled "SELECT THE SITE(S) WITH WHICH THIS USER SHOULD BE ASSOCIATED..." with a "Select..." placeholder.
- Step 5:** A toggle switch labeled "Site Administrator Allowed" with a help icon.
- Step 6:** A section titled "Roles/Sites & Programs Assignment - At least one is required." with an "ADD +" button.
- Step 7:** A "SEND INVITE" button at the bottom right.

Password Security

Password Security

- Users create their own
- Keeps information secure
- Default Requirements
 - Contain 5 characters
 - Contain 1 number
 - Contain 1 symbol
 - Strength of Medium - High

The screenshot displays a user interface for changing a password. At the top left, it shows 'All Sites' and 'Program All Programs'. At the top right, there is a user profile for 'James Gant' from 'Helping Hands Organization' with a 'CHANGE' button. The main content area is titled 'Password Details' and contains the following elements:

- 'New Password *' with an input field.
- 'Confirm New Password *' with an input field.
- 'Password Strength:' with a progress bar.
- A green 'Change Password' button.

Password Security

Managing Passwords:

- Failed login attempts locks account



Password Security

Managing Passwords:

- Failed login attempts locks account
- User Access
 - Forgot Password Link
 - Used to unlock OR reset passwords
 - Email link valid for **30mins**

The image shows a login form with the following elements:

- USERNAME** label above a text input field containing "leizaw@mayaab.com".
- PASSWORD** label above a text input field containing seven dots.
- A dark green rounded button labeled "Log In".
- A link labeled "Forgot Password" enclosed in a red rectangular border.
- Four circular icons representing flags: United States, United Kingdom, Canada, and Australia.

Password Security

Managing Passwords:

- Failed login attempts locks account
- User Access
 - Forgot Password Link
 - Used to unlock OR reset passwords
 - Email link valid for **30mins**
- Administrator Access
 - Force Password Reset Button
 - Send Password Reset Email
 - Both unlock OR reset passwords

The screenshot displays a user management interface. On the left is a dark teal sidebar with navigation options: 'Back to', 'Users', 'Roles', 'Caseload Manager', 'Sites & Programs', 'Record Audits', and 'Logout'. The main content area shows a user profile for 'abby@officemail.com' with first name 'Abby' and last name 'Lipard'. The 'ACTIVE' status is shown as a green toggle switch. An 'Update' button is located at the bottom right of the profile section. Below this is a 'Security' section with a 'PASSWORD' field containing masked characters. At the bottom right of the security section, two buttons are highlighted with an orange border: 'Force Password Reset' and 'Send Password Reset Email'.

Managing Changes

Managing Changes

- Expand Roles & Program Access
- Change Name & Email

User Details

EMAIL
abby@officemail.com

FIRST NAME
Abby

LAST NAME
Lipard

ACTIVE

Update

User Settings

USER TYPE
Standard

SITE ASSOCIATION
Select...

Site Administrator Allowed

Assigned Roles, Sites & Programs

ADD +

Update

Security

PASSWORD

Update

User Preferences

Managing Changes

Steps to update User Account:

1. Click desired user from Manage Users Page

Users Search... All Programs All Roles

Administrator: 2 allowed (2 left) Standard Users: 10 allowed (1 left)

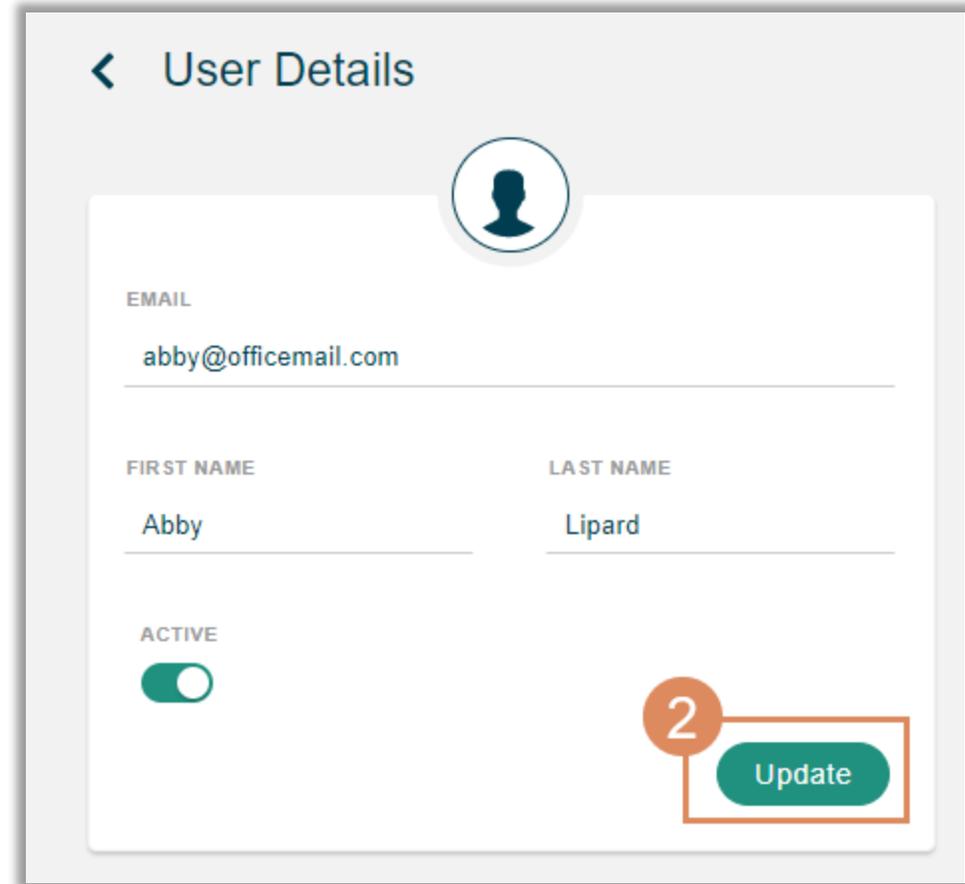
New User

NAME ↓	USERNAME	USER TYPE	INVITED
John Wilson	johnw@helingshands.org		INVITED >
Abby Lipard	abby@officemail.com		1 INVITED >
Bobby Jones	bobbyj@helpinghands.org		INVITED >

Managing Changes

Steps to update User Account:

1. Click desired user from Manage Users Page
2. Click Update on User Card to change name & Email



The screenshot shows a 'User Details' form with the following fields and controls:

- EMAIL:** abby@officemail.com
- FIRST NAME:** Abby
- LAST NAME:** Lipard
- ACTIVE:** A toggle switch is currently turned on (green).
- Update:** A green button with the text 'Update' is located at the bottom right. It is highlighted with a red rectangular box, and a red circle containing the number '2' is positioned above the box, indicating the second step in the process.

Managing Changes

Steps to update User Account:

1. Click desired user from Manage Users Page
2. Click Update on User Card to change name & Email
3. Make changes and click Save

3

* Required

EMAIL *

abby@officemail.com

FIRST NAME *

Abby

LAST NAME *

Lipard

ACTIVE

CANCEL SAVE

Managing Changes

Steps to update User Account:

1. Click desired user from Manage Users Page
2. Click Update on User Card to change name & Email
3. Make changes and click Save
4. Click Add in the User Settings

User Details

EMAIL
abby@officemail.com

FIRST NAME
Abby

LAST NAME
Lipard

ACTIVE

Update

Security

PASSWORD

User Settings

USER TYPE
Standard

SITE ASSOCIATION
Select...

Site Administrator Allowed

Assigned Roles, Sites & Programs

ADD +

Update

Managing Changes

Steps to update User Account:

1. Click desired user from Manage Users Page
2. Click Update on User Card to change name & Email
3. Make changes and click Save
4. Click Add in the User Settings
5. Assign new Roles & Programs
6. Click Save

Add Role/Sites & Programs Assignment * Required

5 **ROLE**
Supervisor

-- FOR --

Q Search...

⊖ 8th Ave Services Organization (2 Programs)	⊕
Strong Families	<input checked="" type="checkbox"/>
Case Management	<input type="checkbox"/>

Managing Changes

For Staff Turn Over

- Make departing person's user account inactive
- Create a NEW user account for new hire

The screenshot displays the 'Users' management page. At the top, there is a search bar and filters for 'All Programs' and 'All Roles'. Below the filters, it shows 'Administrator: 2 allowed (2 left)' and 'Standard Users: 10 allowed (2 left)'. A 'New User +' button is visible. The main content is a table of users:

	NAME ↑	USERNAME	USER TYPE	INVITED
	Luis Canyeda	luisc@apricotfake.com		INVITED >
	Mark Craig	markc@officemail.com	INACTIVE	>
	James Gant	jgant@helpinghands.org		INVITED >

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.