

Apricot

Preparing Your Apricot Rollout Webinar

Meet Your Trainer

First Name Last Name

Training & Development Associate

Learning Objective

To provide tips, best practices and suggestions for launching Apricot with your staff so that Administrators can make informed decisions when developing and fine tuning their Go Live plan.

Agenda

What Go Live Means

Finalizing Forms & Reports

Finalizing Roles & User Accounts

Training & Supporting Staff

What it means to “Go Live”

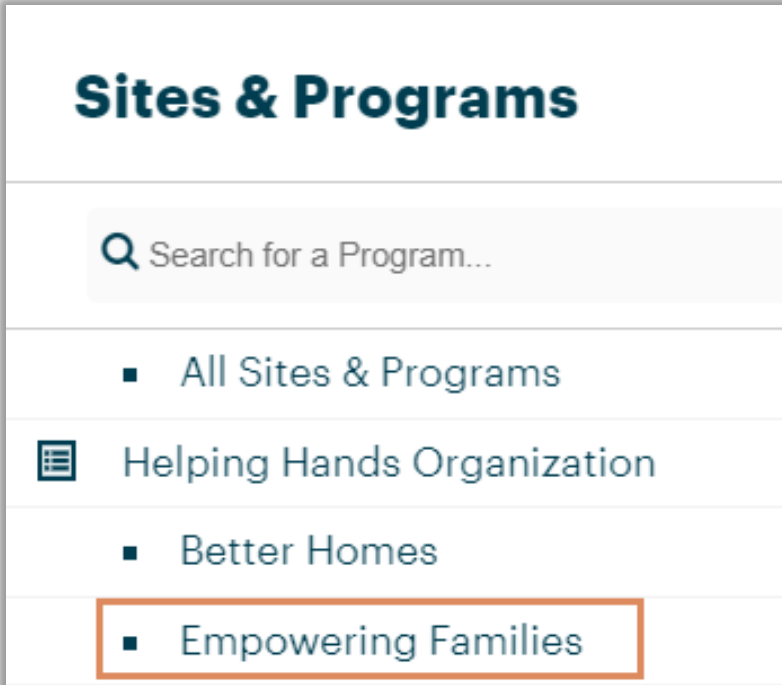
What it means to “Go Live”

- Date you choose to start entering real data
- Anytime after initial design is complete



Go Live by Program Strategy

- Helpful if implementation did not cover all programs
- Start using the system while continuing design BTS



Sites & Programs

Search for a Program...

- All Sites & Programs
- Helping Hands Organization
 - Better Homes
 - Empowering Families

Go Live in Phases Strategy

Gives staff gradual introduction



Go Live in Phases Strategy

Gives staff gradual introduction

Example:

1st week Tier 1 Data.

The screenshot shows a web application interface for managing 'Incoming Referrals'. On the left is a dark sidebar with a 'Search Records' dropdown menu containing 'Incoming Referral', 'Participant Profile', and 'Household Profile'. The 'Incoming Referral' option is highlighted with an orange box. The main content area is titled 'Incoming Referral' and contains an 'Incoming Referral Search' section with a search bar and a 'Browse All' link. Below this, it states 'The following 7 Incoming Referral records are available' and displays a table with columns for Client Name, Date Of Birth, Cell Phone, and Email. The right sidebar is titled 'EXPAND ALL' and contains a 'Search Actions' dropdown menu with options like 'New Incoming Referral', 'Clear Search History', 'Program Access', 'Merge Folders', 'Create Referral', and 'Show Enrollment Actions'. The 'New Incoming Referral' option is highlighted with an orange box.

Client Name	Date Of Birth	Cell Phone	Email
Maya Anderson	10/09/1986	717-898-9090	manderson@fakemail.com
Alicia Henry	08/19/1965		henry.alicia@ymail.com
Amara Jones	11/02/1990	212-876-2546	amara1234@fakemail.com

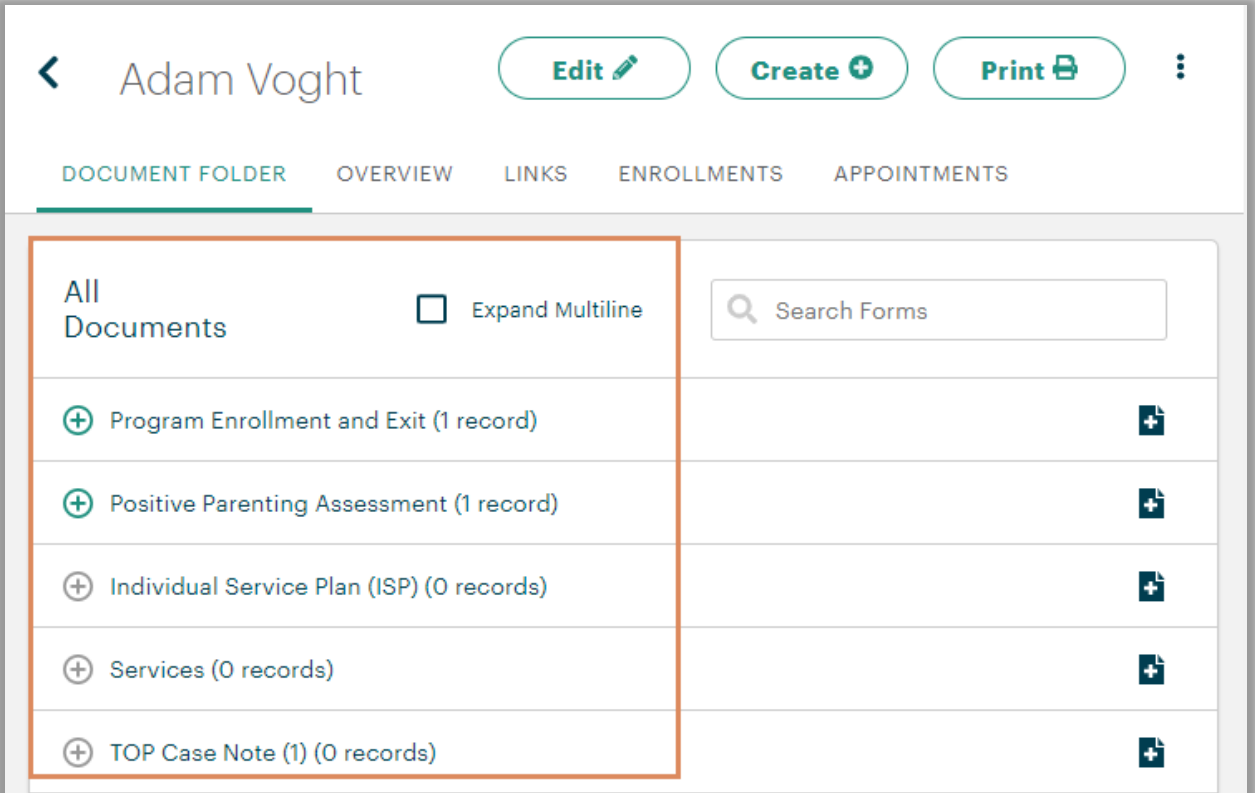
Go Live in Phases Strategy

Gives staff gradual introduction

Example:

1st week Tier 1 Data.

2nd week Tier 1 and Tier 2 Data



The screenshot shows a user interface for a user named Adam Voght. At the top, there are navigation buttons for 'Edit', 'Create', and 'Print'. Below this is a menu with options: 'DOCUMENT FOLDER', 'OVERVIEW', 'LINKS', 'ENROLLMENTS', and 'APPOINTMENTS'. The 'DOCUMENT FOLDER' option is selected and highlighted with a green underline. The main content area displays a list of document folders under the heading 'All Documents'. There is a search bar labeled 'Search Forms' and an 'Expand Multiline' checkbox. The list includes the following items:

- Program Enrollment and Exit (1 record)
- Positive Parenting Assessment (1 record)
- Individual Service Plan (ISP) (0 records)
- Services (0 records)
- TOP Case Note (1) (0 records)

Each item in the list has a plus icon on the left and a document icon on the right. The entire list area is enclosed in a brown rectangular border.

Go Live 'Rip the Band-Aid' Strategy

- All Programs & All Features
- Less time/effort to launch
- Team may require more support at first*

The screenshot shows the administrator interface of a Case Management System. At the top, there is a navigation bar with a 'MENU' icon, the role 'ADMINISTRATOR', 'All Sites' (Program All Programs), a 'CHANGE' button, and a user profile for 'Sabrina Gilbert'. The main content area is titled 'Welcome to our Case Management System!' and includes a 'Need Help?' dropdown menu and an 'Announcements' section. The left sidebar contains a 'MENU' with options: 'Search Records' (with sub-items: Incoming Referral, Participant Profile, Household Profile, Caseworker Profile, Classes Offered), 'My Apricot Tools', 'Customer Care', and 'Help Center'. The main content area provides instructions for users who need help, including 'Step 1' (review the FAQ form) and 'Step 2' (email support at datasupport@gmail.com). A list of items to include in the email is provided: Name of the feature or form you're using, Error message if any and the steps you took leading up to the error, and Screen shot of issue. A final note encourages users to submit requests, suggestions, and recommendations to make the system easier to use.

Finalizing Forms & Reports

Finalizing Forms

Questions to ask:

1. Are all fields pertinent to reporting required in my form?
2. Are all the desired options listed in the multiple-choice fields of my forms?
3. Are all the required forms published with the appropriate form permissions enabled?
4. Have all changes that were requested during the testing phase been made in the respective forms?
5. Are there any key forms that still need to be created in Apricot?



Finalizing Reports

Option 1: Leadership Reports ready by launch date & build user reports later.

The screenshot shows a web interface titled "My Reports". Below the title is a dark teal bar with the text "Select a Report Below". A dropdown menu is open, showing "Leadership Team Reports" with a downward arrow. The dropdown contains three items: "Data Quality Report", "FY Report", and "No Initial Assessment", each with a right-pointing arrow. To the right of each item is a link labeled "Actions" with a right-pointing arrow. The entire dropdown menu is highlighted with an orange border.

Report Type	Actions
Leadership Team Reports	
Data Quality Report	Actions
FY Report	Actions
No Initial Assessment	Actions

Finalizing Reports

Option 1: Leadership Reports ready by launch date & build user reports later.

Option 2: Reports for both staff & leadership ready by launch date.

The screenshot displays a web interface titled "My Reports". At the top, there is a dark teal header with the text "Select a Report Below". Below this, the interface is organized into two main sections. The first section, "Leadership Team Reports", is highlighted with an orange border and contains a single report option: "Leadership Team Reports" with a right-pointing arrow. The second section, "Reports for Staff", is also highlighted with an orange border and features a dropdown arrow. Underneath, it lists five report options, each with a right-pointing arrow and an "Actions" link with a right-pointing arrow to its right. The report options are: "Client List", "Pending Inquiries List", "Count of Contacts by Client", "Service Stats", and "Count of Contacts by Client".

Report Category	Report Name	Action
Leadership Team Reports	Leadership Team Reports	
Reports for Staff	Client List	Actions
	Pending Inquiries List	Actions
	Count of Contacts by Client	Actions
	Service Stats	Actions
	Count of Contacts by Client	Actions

Finalizing Reports

Option 1: Leadership Reports ready by launch date & build user reports later.

Option 2: Reports for both staff & leadership ready by launch date.

Example Report for Staff: Pending Inquiries Report

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
Jane	Doe	555.555.5555.	jdoe@fake.com	Pending
Jaquie	Thompson	512.777.4547.	jthompson@gmail.com	Pending
Trey	Singer	512.556.4544.	treysinger@gmail.com	Pending
Vicky	Grayson	512.454.5545.	vgrayson@gmail.com	Pending

Finalizing Reports

Questions to ask:

1. Have we created reports that could support my staff with daily processes?
2. Are the reports that support daily tasks connected to the Bulletins feature?
3. Are all the required reports published with the appropriate permissions enabled?
4. Have all reports that were requested during the testing phase been created and published?
5. Are there any key reports that still need to be created in Apricot?



Finalizing Roles & User Accounts

Finalizing Roles

- Ensures users have access to desired features
- Accessed via Manage Roles

The screenshot displays the 'Role Details' page for a role named 'Team Members'. The role's description is 'Job Coaches, Caseworkers'. The 'Permissions' section is active, showing a list of permissions under the 'FORMS' category. The permissions are 'Class Profile', 'Donor Profile', and 'Contact'. Each permission has a 'VIEW' toggle (checked), a 'SEARCH' toggle (checked), a 'CREATE' toggle (unchecked), and an 'EDIT' toggle (unchecked). The 'FORMS' tab is highlighted in the navigation bar, and the 'Permissions' section is also highlighted.

PROG. SPECIFIC	NAME	VIEW	SEARCH	CREATE	EDIT
<input checked="" type="checkbox"/>	Class Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Donor Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Finalizing Roles

Questions to ask:

1. Are all the appropriate forms and records visible for this role (including any new forms)?
2. Are all the appropriate actions for the pertinent forms enabled for users in this role?
3. Are all the appropriate reports with the appropriate actions enabled for this role (including new reports)?
4. Do users in this role have access to all the appropriate bulletins?
5. Do users in this role have access to all the appropriate shared files?
6. Do users in this role appropriate access for the Referrals feature?



Finalize User Accounts

- Create User Accounts

Users

Search... All Programs All Roles

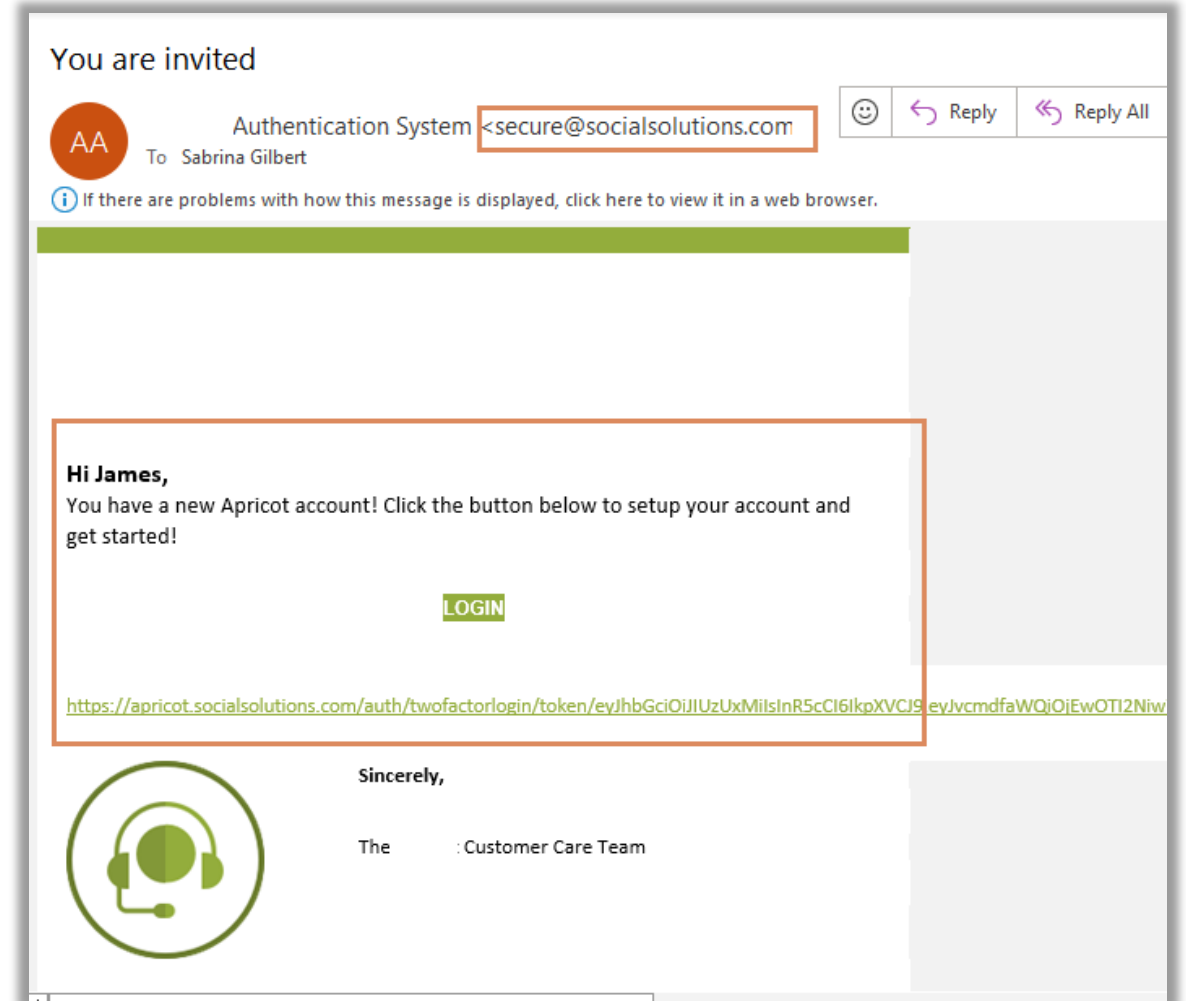
Administrator: 2 allowed (2 left) Standard Users: 10 allowed (1 left)

New User +

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

Finalize User Accounts

- Create User Accounts
 - Triggers Email Invite
 - Link expires after 30mins
- Make Inactive until Training Day
- Reactivate just before training
 - Triggers Email Invite again



Finalize User Accounts

Steps to Create New User:

1. Users
2. New User

Users

Search... All Programs All Roles

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

New User +

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

Finalize User Accounts

Steps to Create New User:

1. Users
2. New User
3. Enter User Details
4. Click Add in Roles Section

User Details * Required

EMAIL *

FIRST NAME * LAST NAME *

USER TYPE *

Administrator Standard

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

Select... | v

Site Administrator Allowed

Roles/Sites & Programs Assignment - At least one is required.

ADD +

Finalize User Accounts

Steps to Create New User:

1. Users
2. New User
3. Enter User Details
4. Click Add in Roles Section
5. Select desired Role and Programs
6. Save
7. Repeat for additional roles as needed

The screenshot shows a web form titled "Add Role/Sites & Programs Assignment" with a "Required" indicator. The form includes a "ROLE" dropdown menu currently set to "Team Members", which is highlighted with a red box and a callout "5". Below the dropdown is a "-- FOR --" label. A search bar with "Search..." is also present. Below the search bar is a list of programs under the heading "Helping Hands NJ (3 Programs)", which is also highlighted with a red box and a callout "5". The list includes "Adult Case Management NJ" (checkbox), "Youth Development NJ" (checkbox checked), and "Mentoring NJ" (checkbox). At the bottom right, there are "CANCEL" and "SAVE" buttons, with the "SAVE" button highlighted by a red box and a callout "6".

Finalize User Accounts

Steps to Create New User:

1. Users
2. New User
3. Enter User Details
4. Click Add in Roles Section
5. Select desired Role and Programs
6. Save
7. Repeat for additional roles as needed
8. Click Send Invite

User Details * Required

EMAIL *
vhewitt@socialsolutions.com

FIRST NAME *
Valerie

LAST NAME *
Hewitt

USER TYPE *
 Administrator Standard

SELECT THE SITE(S) WITH WHICH THIS USER SHOULD BE ASSOCIATED... *
Helping Hands NJ x | v

Site Administrator Allowed

Roles/Sites & Programs Assignment - At least one is required. ?

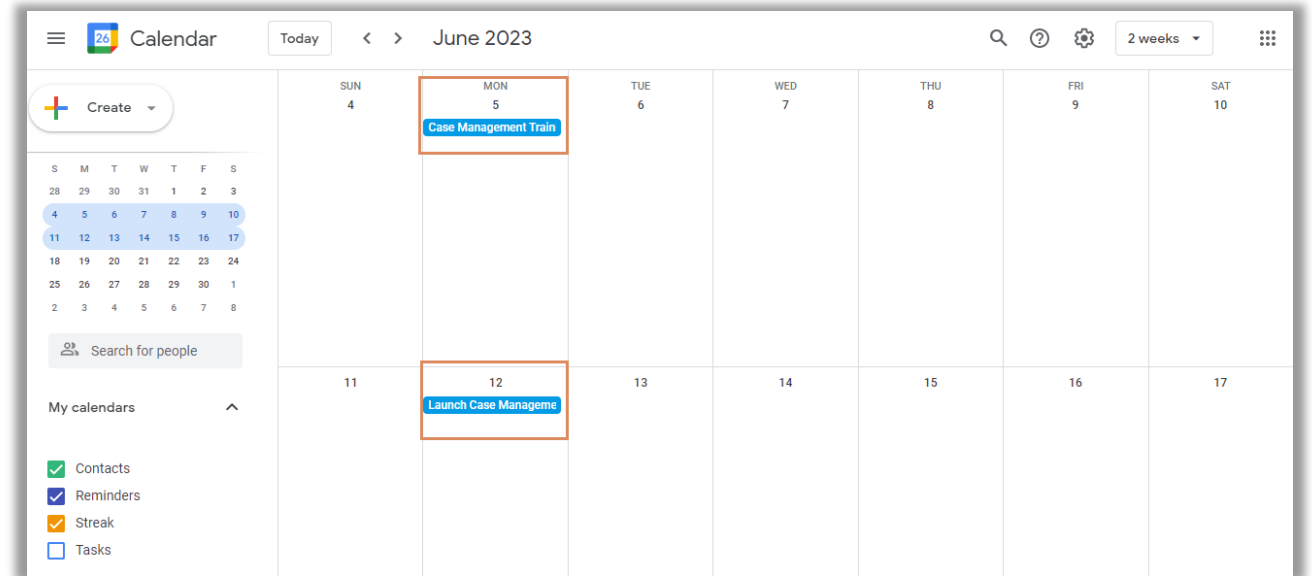
Team Members
Programs: 1 (All)

SEND INVITE

Training & Supporting Staff

Training & Supporting Staff

- 1 week or less before launch date



Training & Supporting Staff

- 1 week or less before launch date
- **Options:**
 - Custom Training with Bonterra
 - Host your own training

Custom End User Training (CEUT)

🕒 3 hr

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

[Cookie settings](#)

Select a Date & Time

June 2023

Wednesday, June 21

● times you're available

● 10:00am

Time zone

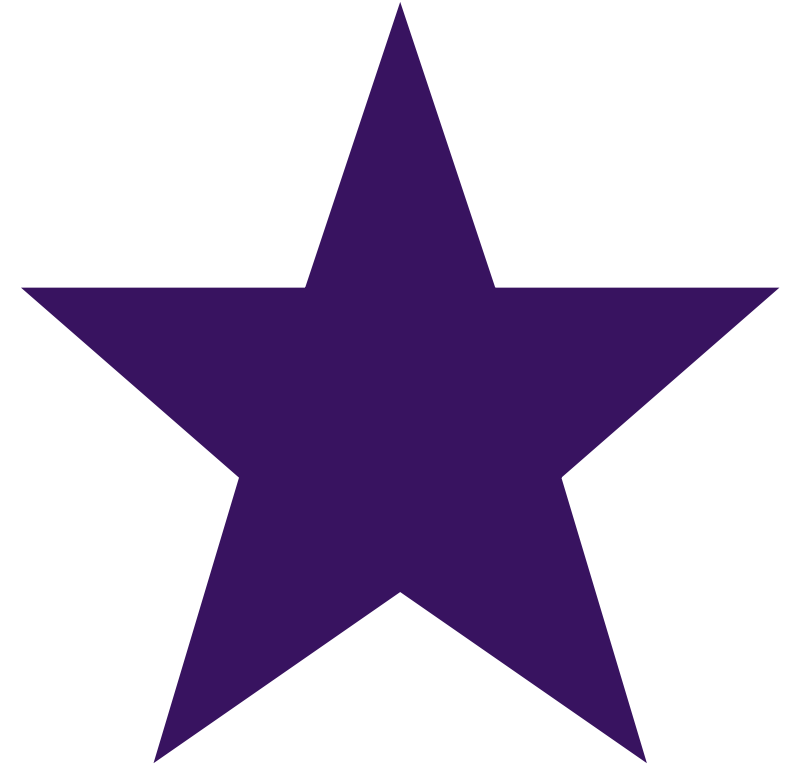
🌐 Eastern Time - US & Cana... (12:55pm) ▼

POWERED BY
Calendly

Training & Supporting Staff

Best Practice:

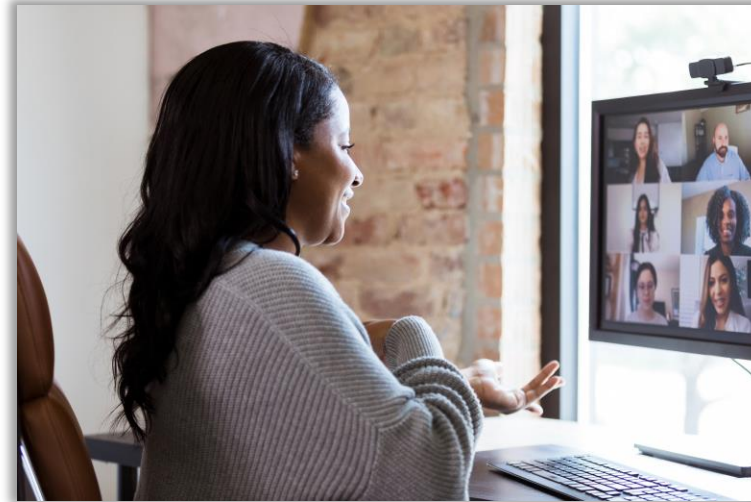
- 1 Program at a time
- Workflow from intake to exit
- 15 Attendees or less
- Train in live system
- You show, Then Staff Do



Training & Supporting Staff

Logistics

- Virtual
- In Person
 - Projector
 - Wi – fi
 - Computers



Training & Supporting Staff

Logistics

- Virtual
- In Person
 - Projector
 - Wi – fi
 - Computers
- Track Suggestions



Training & Supporting Staff

Logistics

- Virtual
- In Person
 - Projector
 - Wi – fi
 - Computers
- Track Suggestions
- Plan for support after training

Welcome to our Case Management System! COLLAPSE ALL

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.

Training & Supporting Staff

Logistics

- Virtual
- In Person
 - Projector
 - Wi – fi
 - Computers
- Track Suggestions
- Plan for support after training
- Set expectations

The screenshot shows a calendar application for June 2023. The main calendar view is a grid with columns for days of the week (SUN, MON, TUE, WED) and rows for dates. A 'Case Management Train' event is scheduled for Monday, June 5th. Another event, 'Launch Case Manageme', is scheduled for Tuesday, June 12th. A callout box with an orange border and background points to the 12th, containing the text 'Announce Launch Date during Training'. The left sidebar contains a 'Create' button, a mini-month calendar, a 'Search for people' field, and a 'My calendars' section with checkboxes for 'Contacts', 'Reminders', 'Streak', and 'Tasks'.

Training & Supporting Staff


To-Do Day Before Launch

- Archive fake records

Participant Profile


COLLAPSE ALL


Profile Details ▾


***Participant Name** 

Wilbur Middle Fake

Intake Date

10/16/2016 

***Date of Birth** 

09/18/1950 

Client Status

Active
 Inactive
 Other

How did you hear about us?

Internet
 Newspaper
 Radio
 Other

Client Phone Number

ext.

Client Email

customer_care@apricot.infr

Record Options ▾

Save Record
 Print Mode
 Copy Record
 Archive Record
 View History
 New Participant Pr
 View Folder
 Go To Search

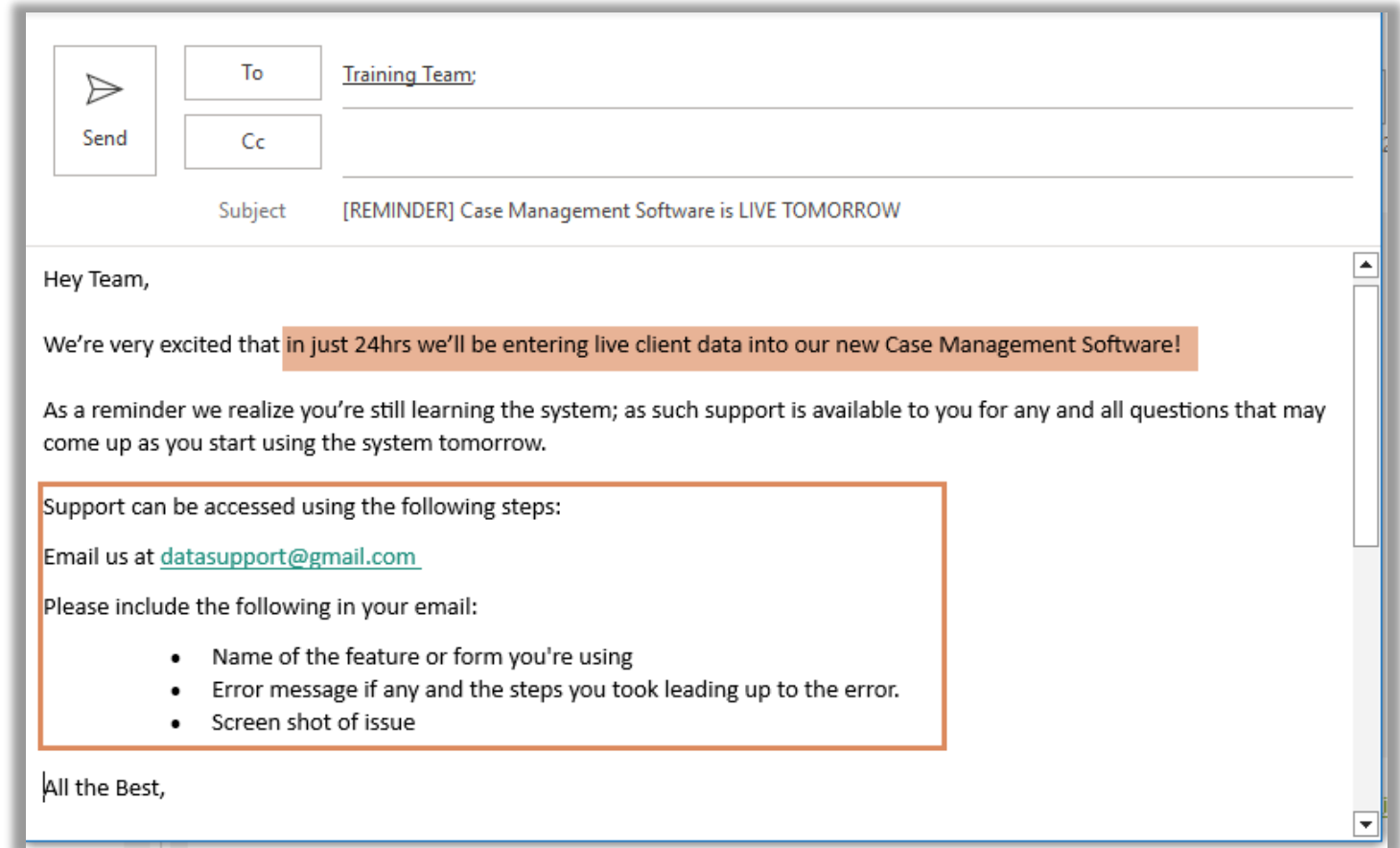
Assigned Program

Better Homes
 Program Access

Training & Supporting Staff

To-Do Day Before Launch

- Archive fake records
- Reminder email to staff
- Answer questions



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.