Apricot
Preparing Your Apricot Rollout Webinar

Bonterra™

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

Bonterra™

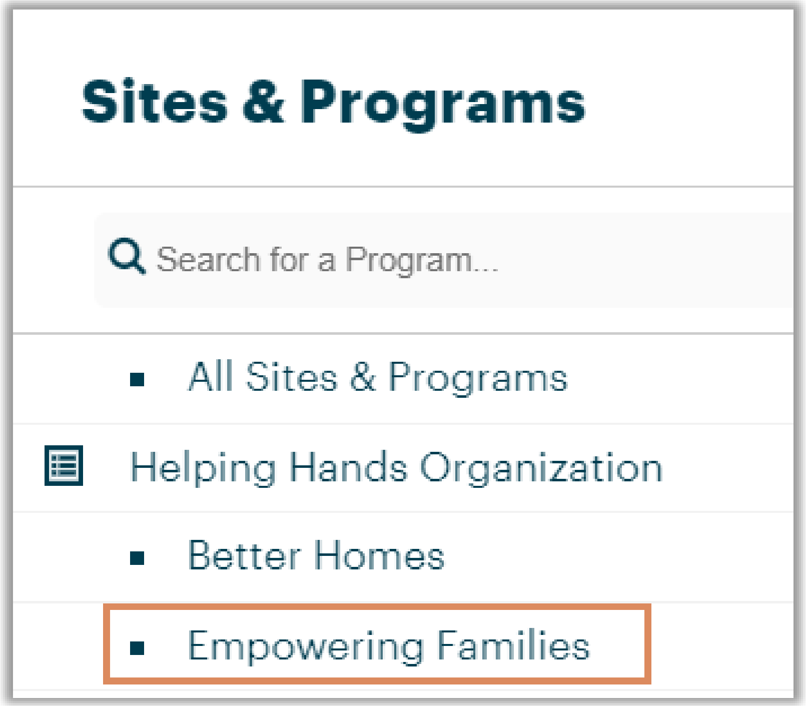
What it means to "Go Live"

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



Go Live in Phases Strategy

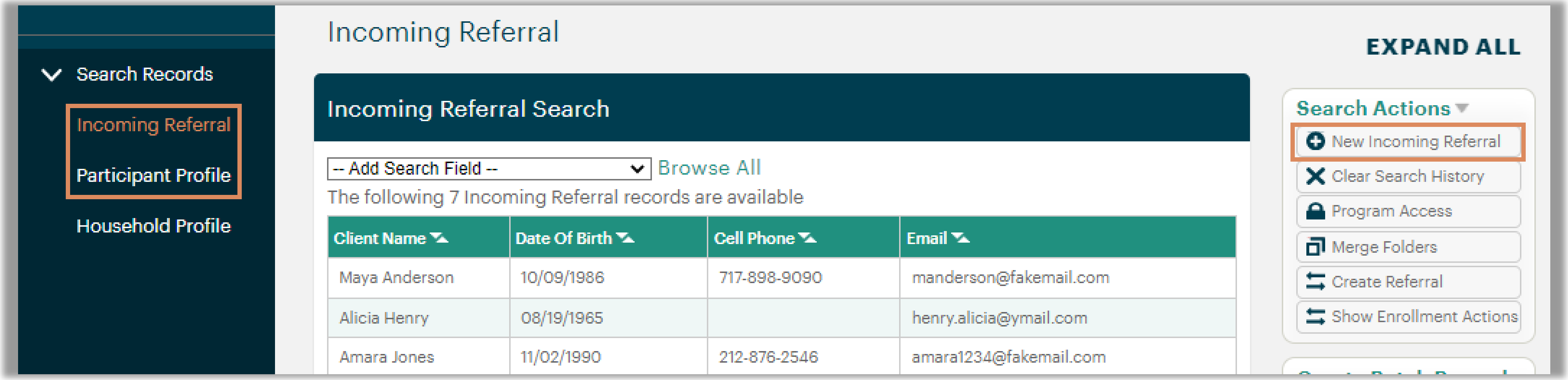
Gives staff gradual introduction

Go Live in Phases Strategy

Gives staff gradual introduction

<u>Example:</u>

1st week Tier 1 Data.



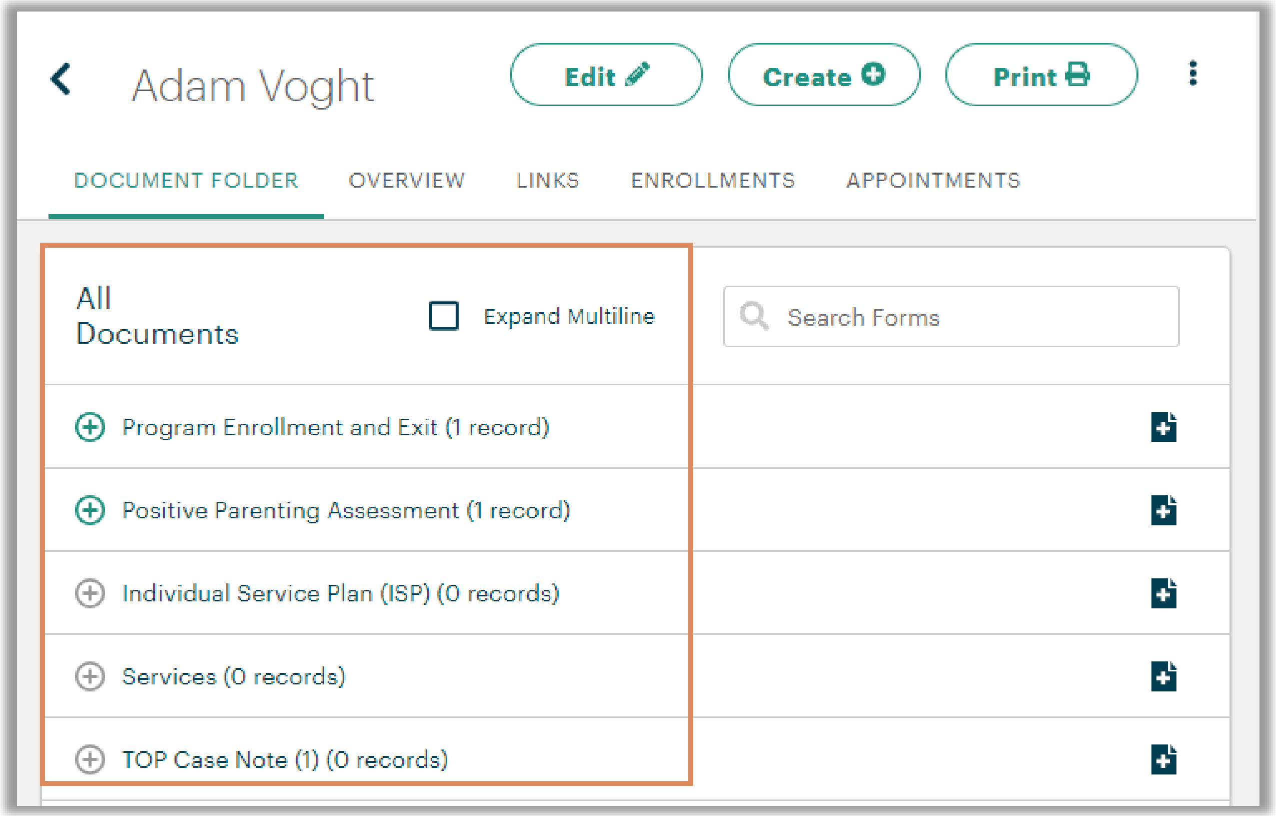
Go Live in Phases Strategy

Gives staff gradual introduction

<u>Example:</u>

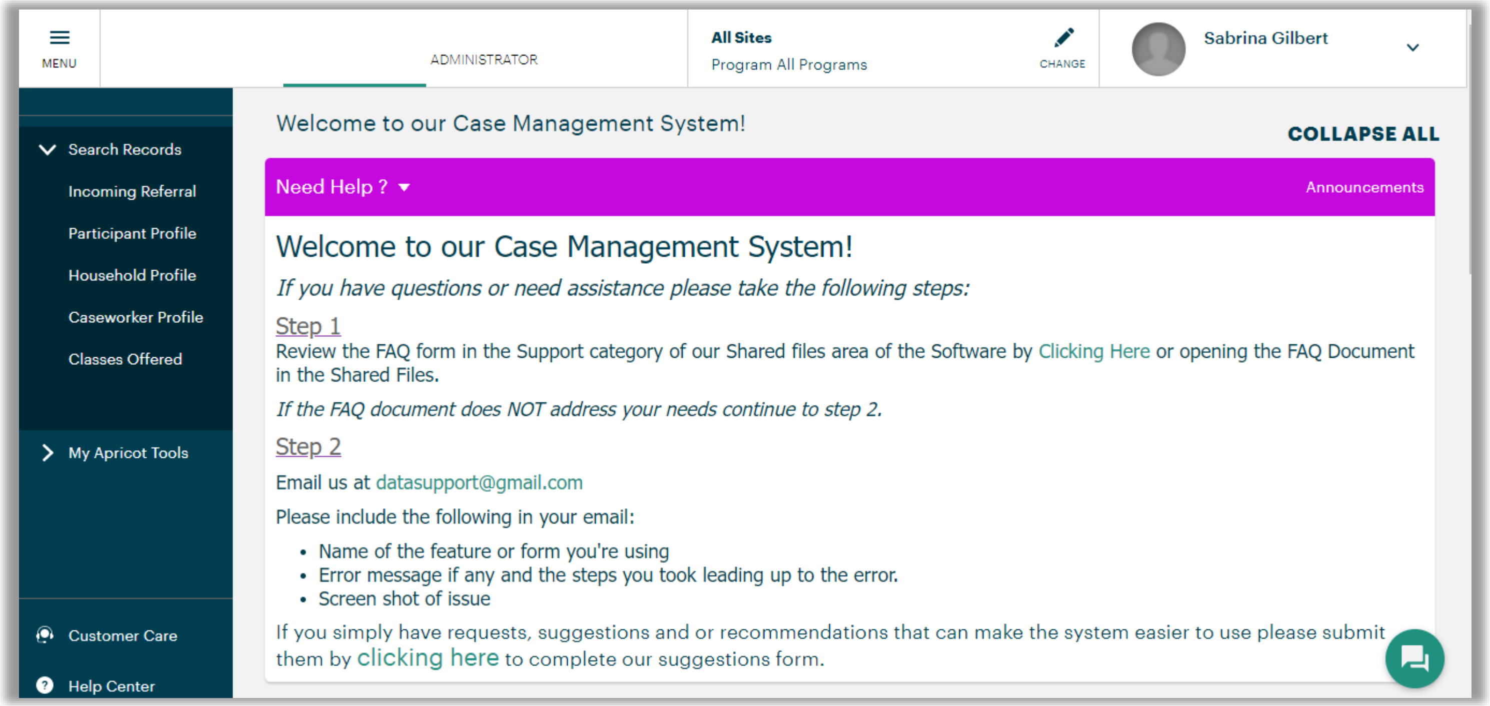
1st week Tier 1 Data.

2nd week Tier 1 **<u>and</u>** Tier 2 Data



Go Live 'Rip the Band-Aid' Strategy

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



Bonterra

Finalizing Forms & Reports

Finalizing Forms

<u>Questions to ask:</u>

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?

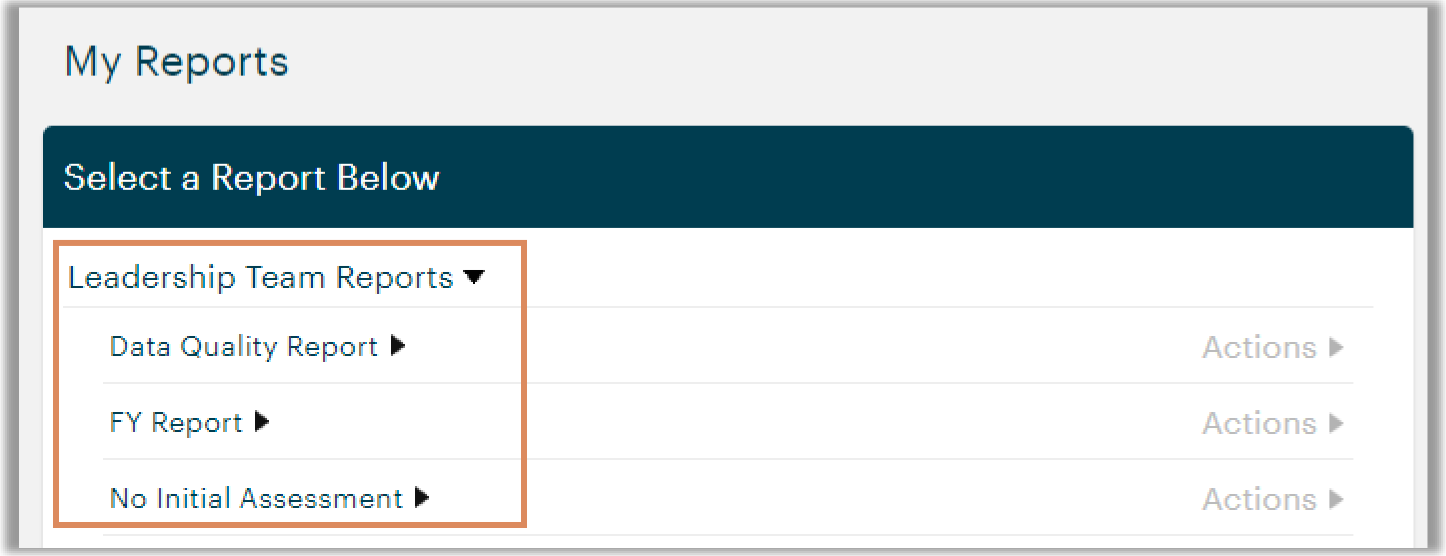
3. Are all the required forms published with the appropriate form permissions enabled?

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

<u>Option 1:</u> Leadership Reports ready by launch date & build user reports later.

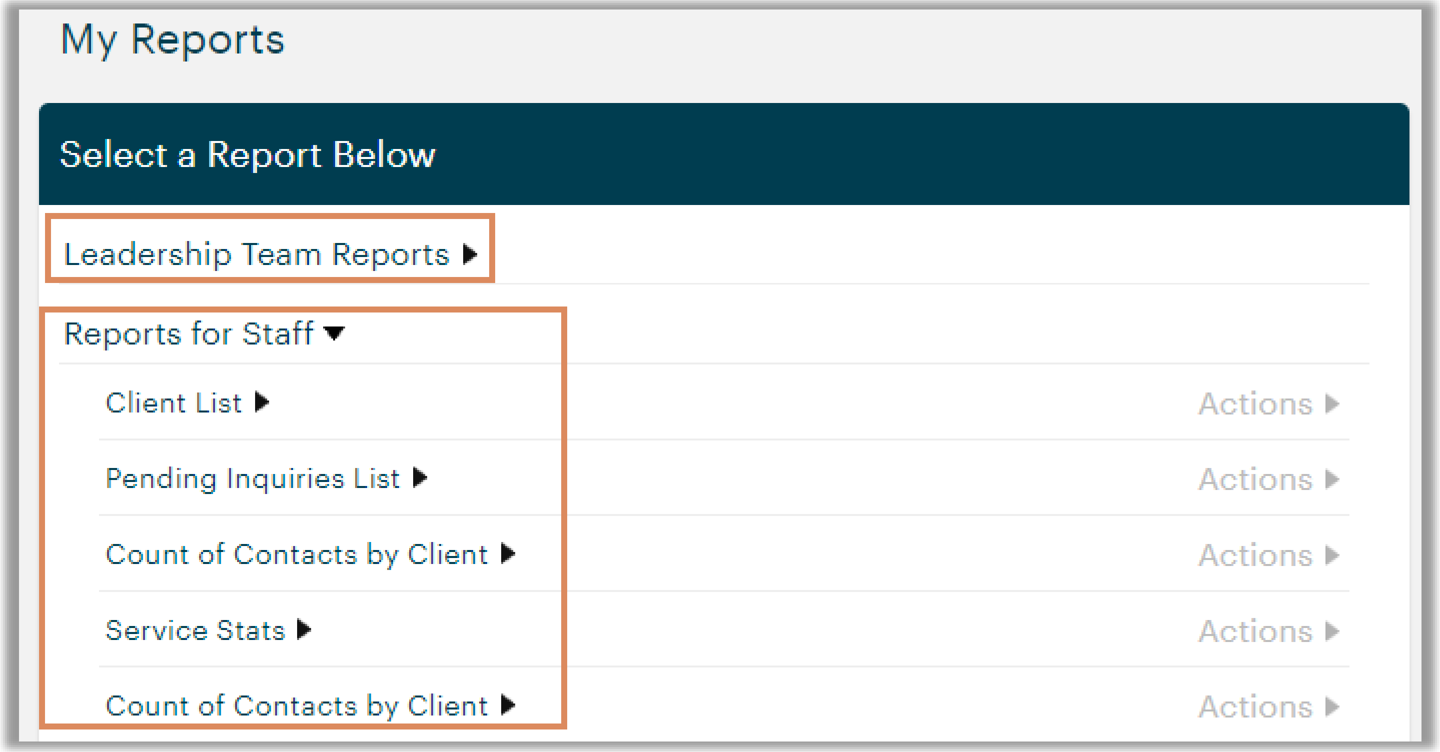


Bonterra

Finalizing Reports

<u>Option 1:</u> Leadership Reports ready by launch date & build user reports later.

<u>Option 2:</u> Reports for both staff & leadership ready by launch date.



Finalizing Reports

<u>Option 1:</u> Leadership Reports ready by launch date & build user reports later.

<u>Option 2:</u> Reports for both staff & leadership ready by launch date.

Example Report for Staff: Pending Inquiries Report

Pending Inquiries

Bulletin with Report Example

Pending Inqueries
Report last run May 26th 2023, 10:50 am
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
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

Total R
11

Finalizing Reports

<u>Questions to ask:</u>

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?

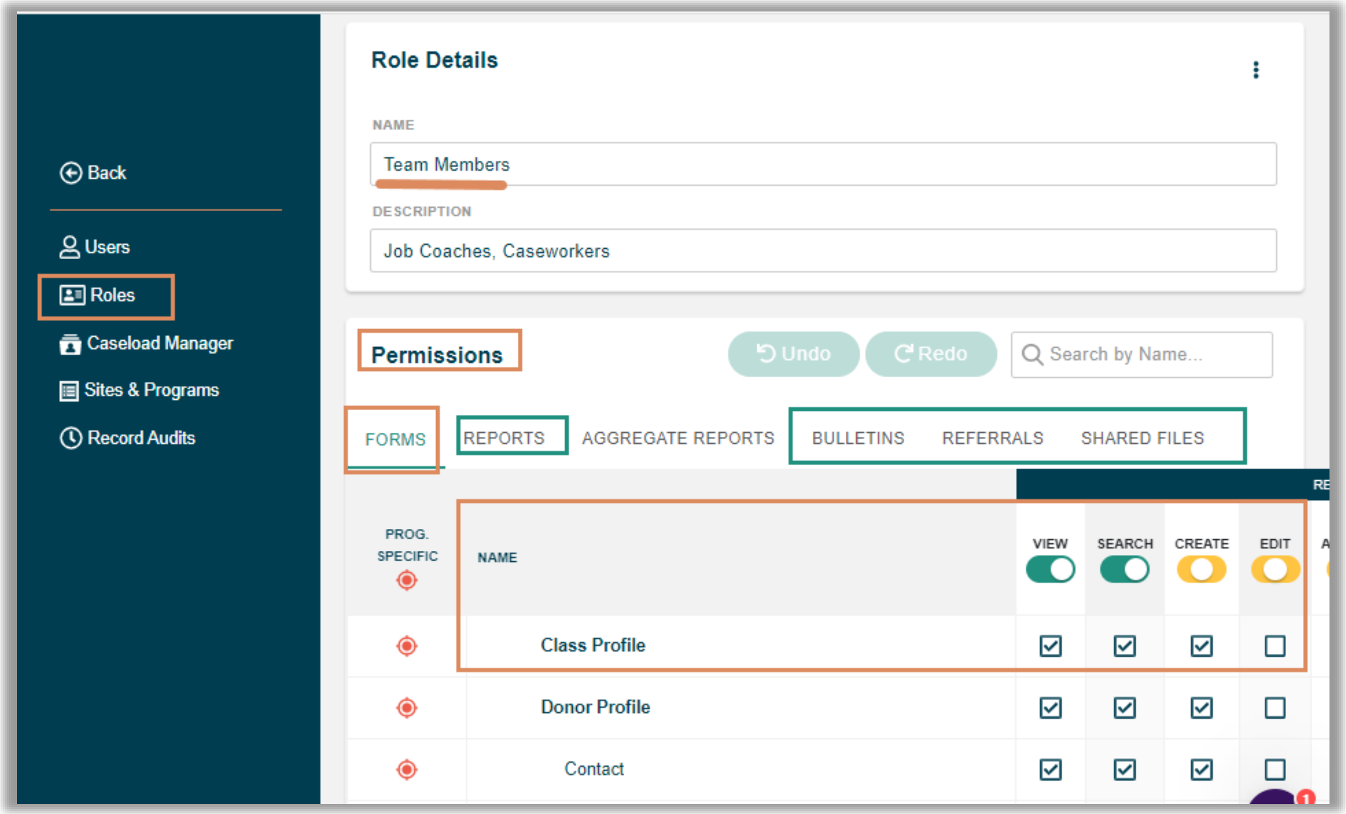
4. Have all reports that were requested during the testing phase been created and published?

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



Bonterra

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?

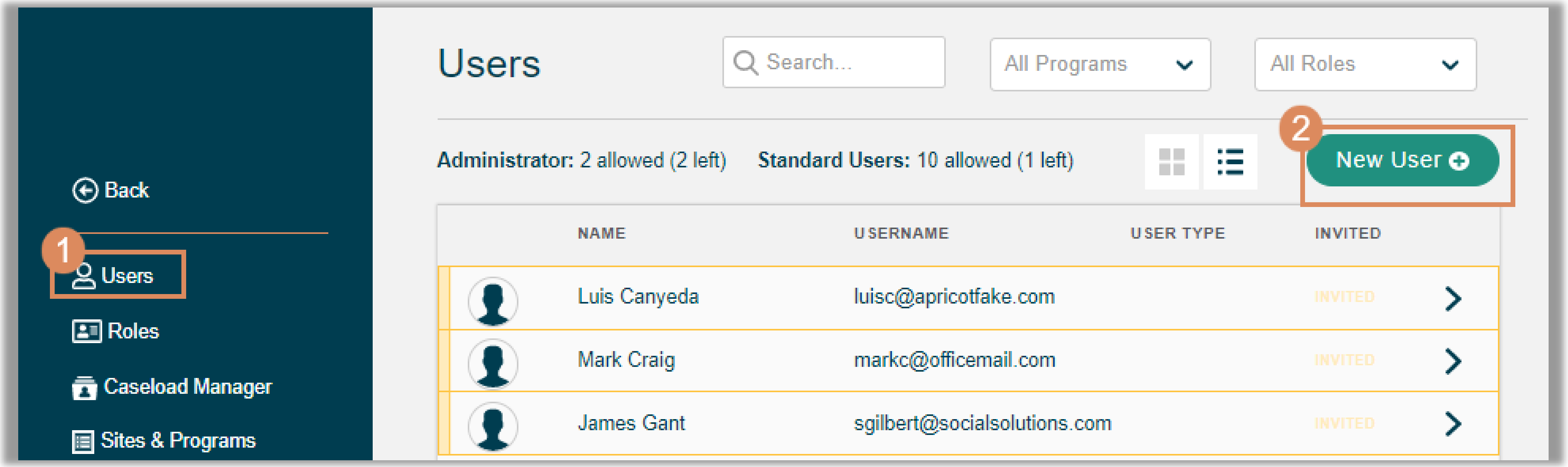
3. Are all the appropriate reports with the appropriate actions enabled for this role (including new reports)?

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?

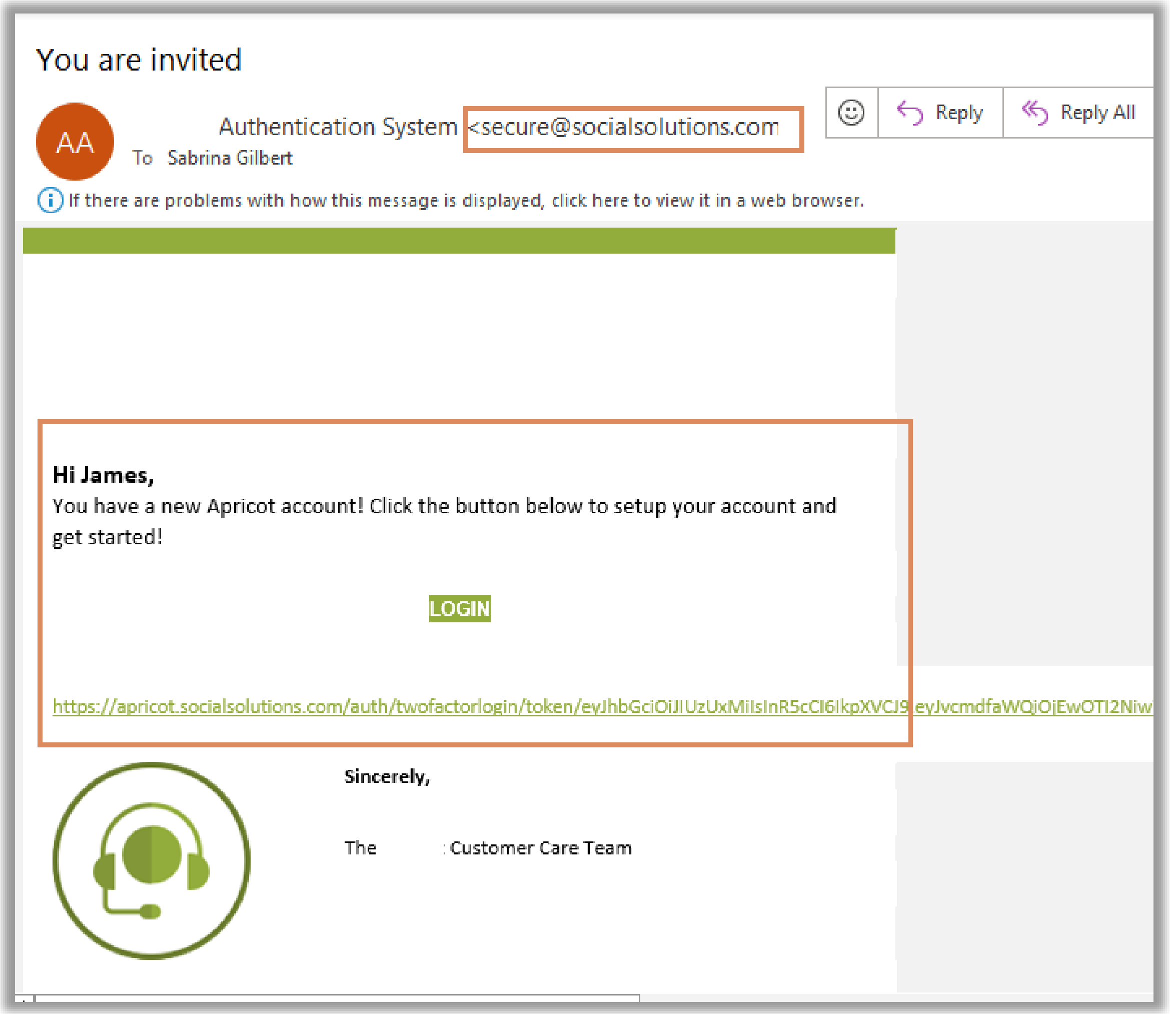
Finalize User Accounts

- Create User Accounts



Finalize User Accounts

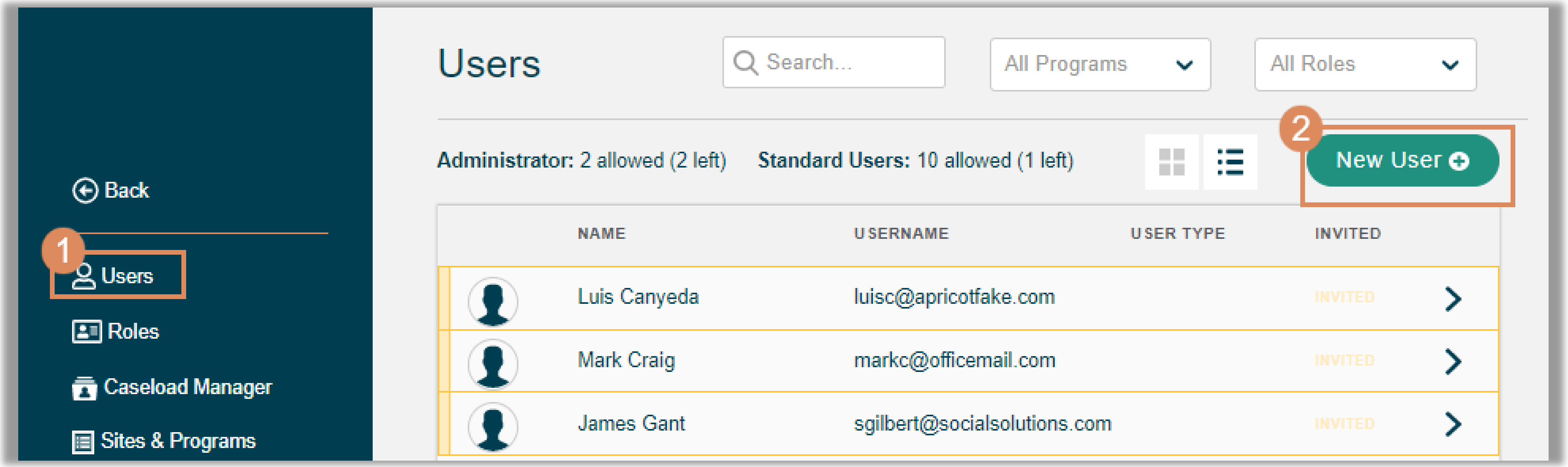
- Create User Accounts
  - Triggers Email Invite
  - Link expires after 30mins
- Make Inactive until Training Day
- Reactivate just before training
  - Triggers Email Invite again



Finalize User Accounts

<u>Steps to Create New User:</u>

1. Users
2. New User

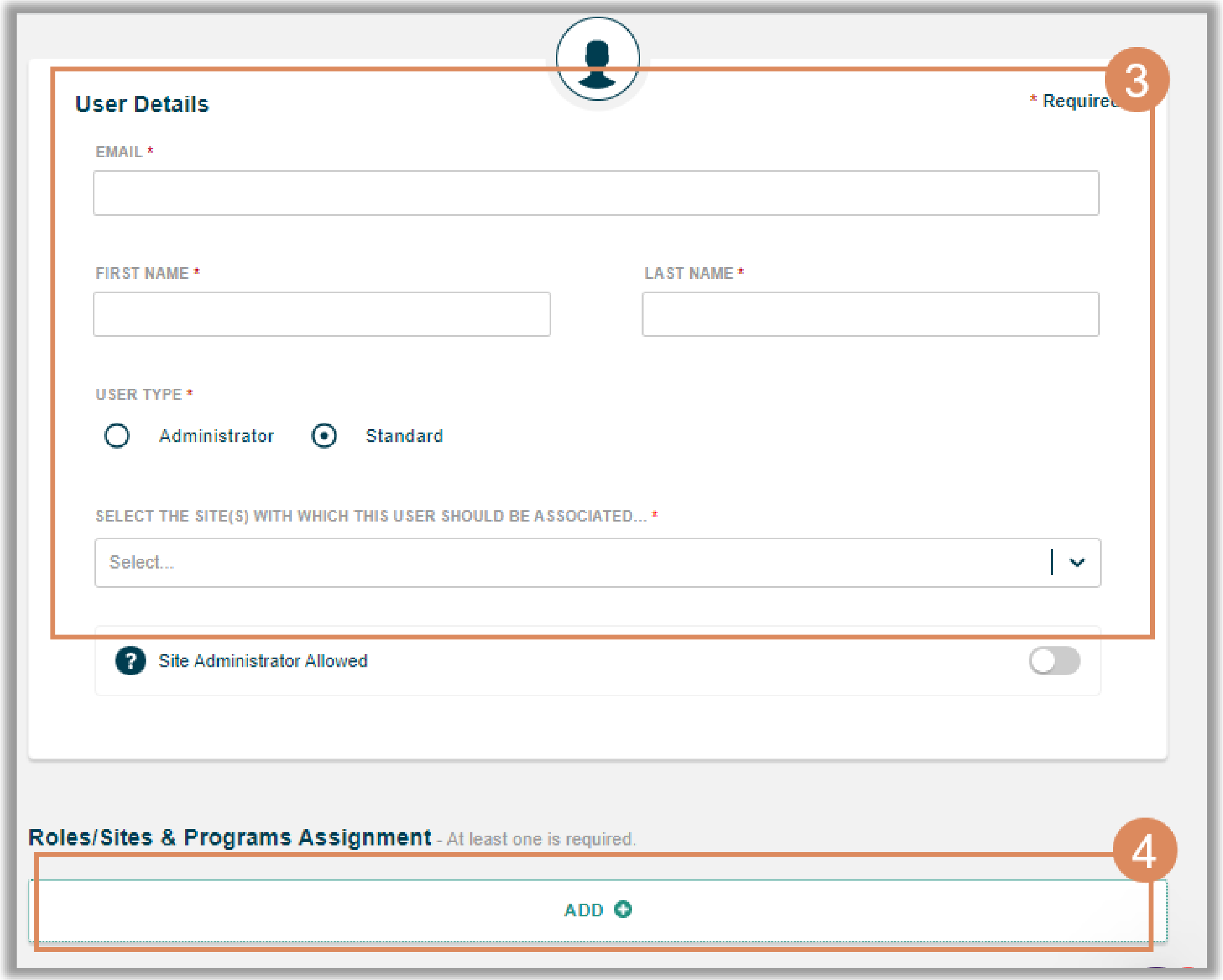


Bonterra

Finalize User Accounts

<u>Steps to Create New User:</u>

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

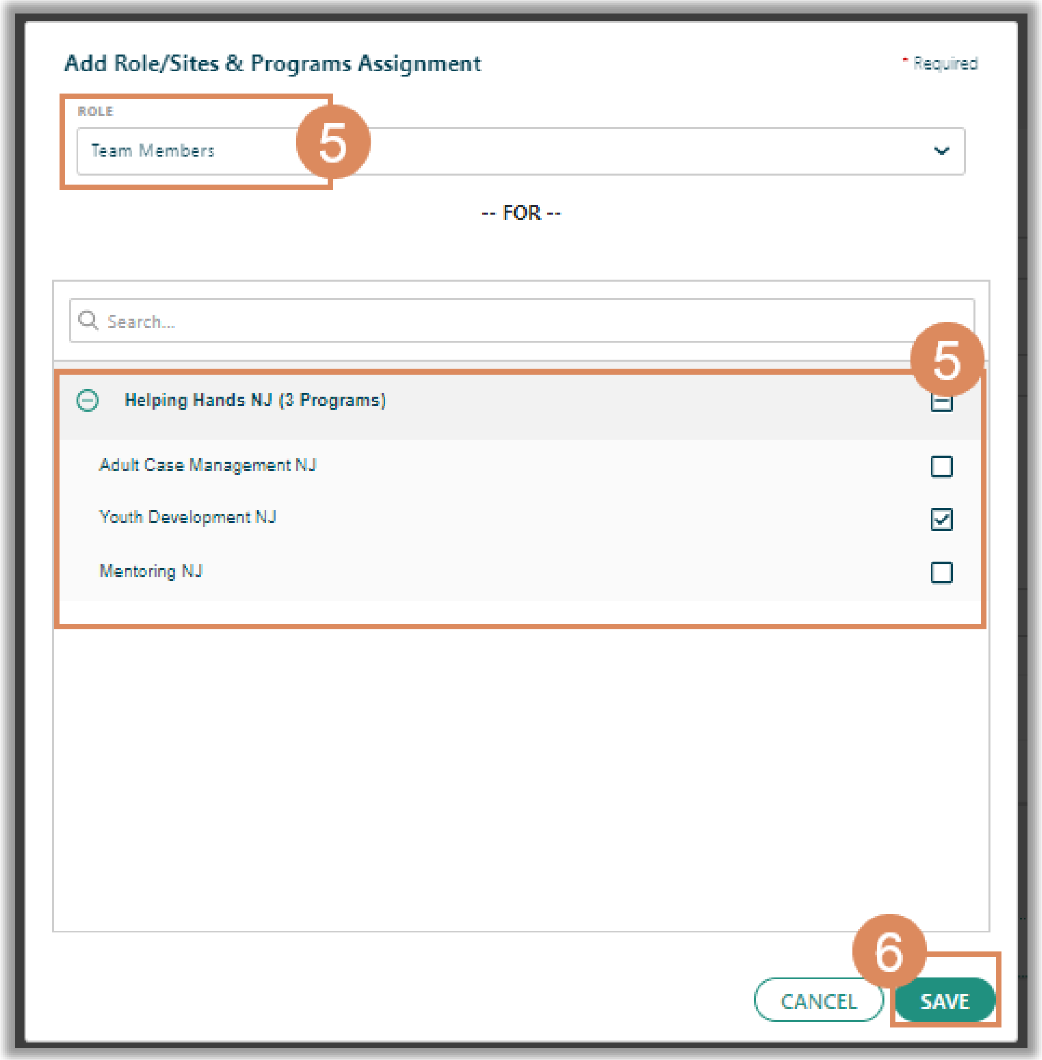


Bonterra

Finalize User Accounts

<u>Steps to Create New User:</u>

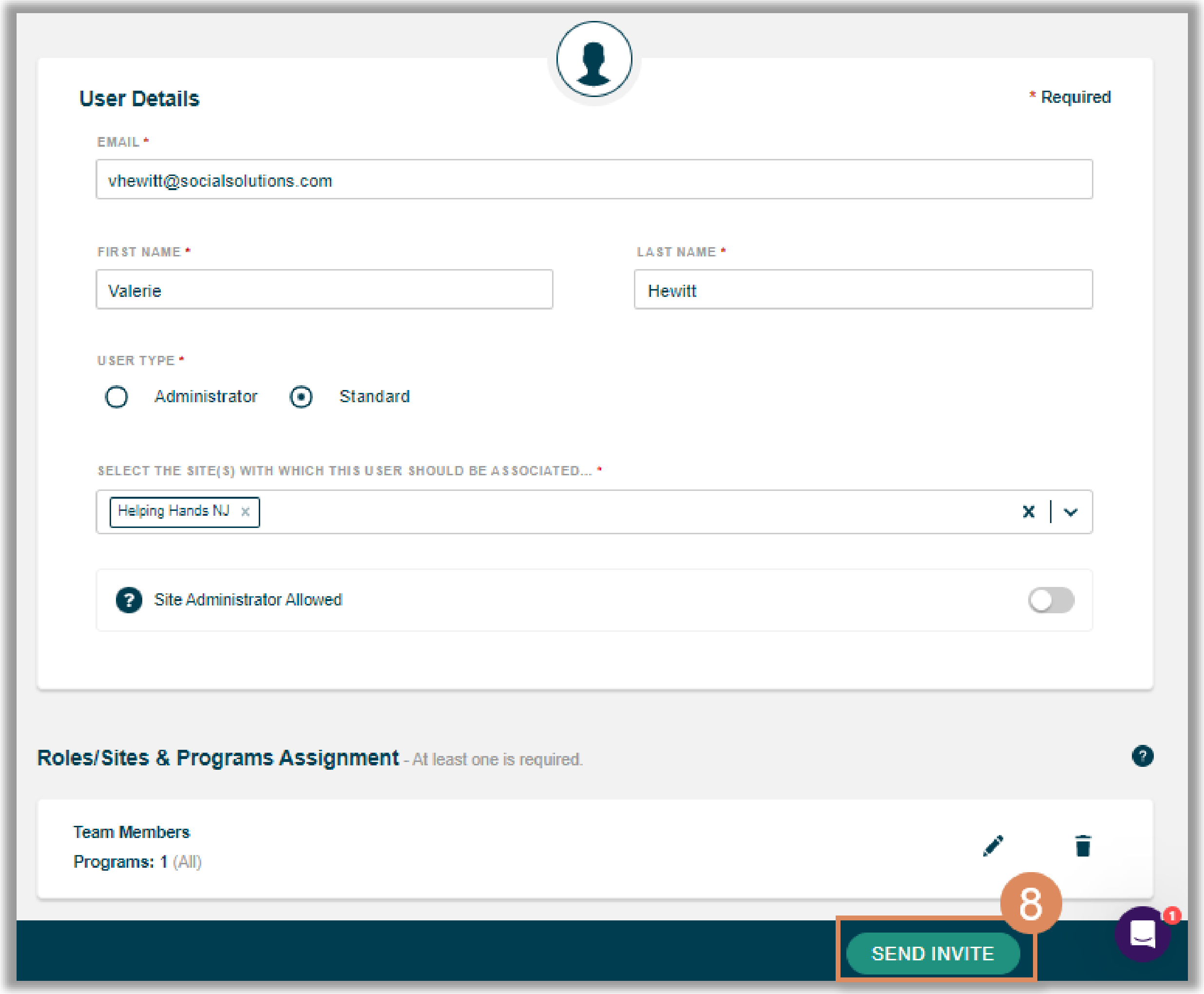
1. Users
2. New User
3. Enter User Details
4. Click Add in Roles Section
5. Select desired Role and Programs
6. Save
7. Repeat for additional roles as needed



Finalize User Accounts

<u>Steps to Create New User:</u>

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

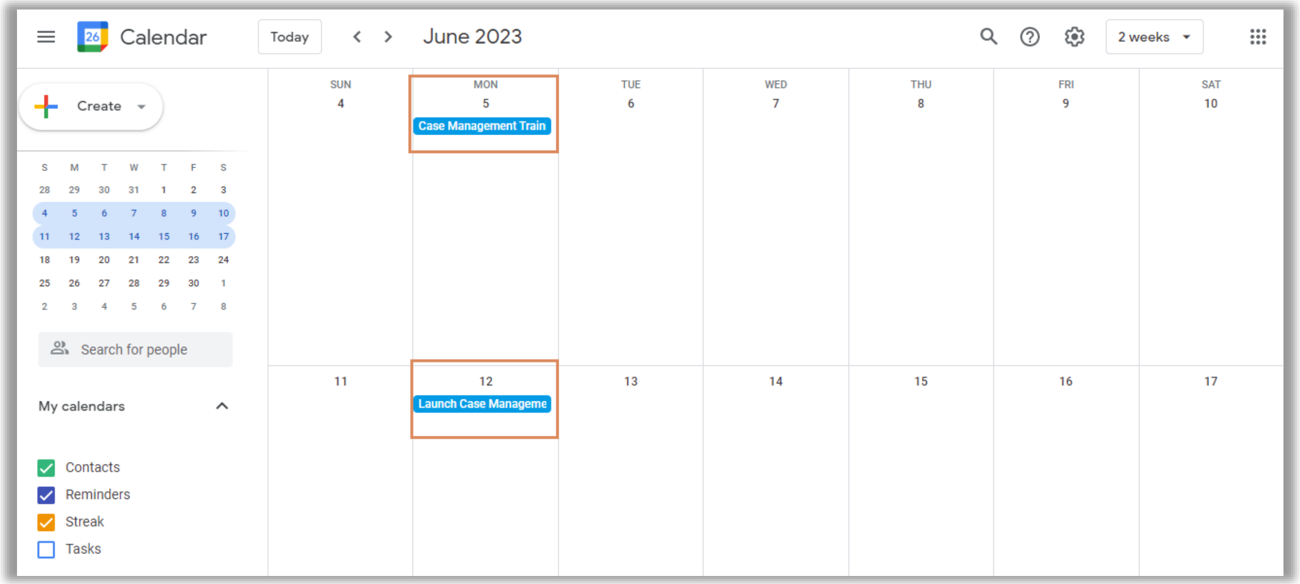


Bonterra

Training & Supporting Staff

Training & Supporting Staff

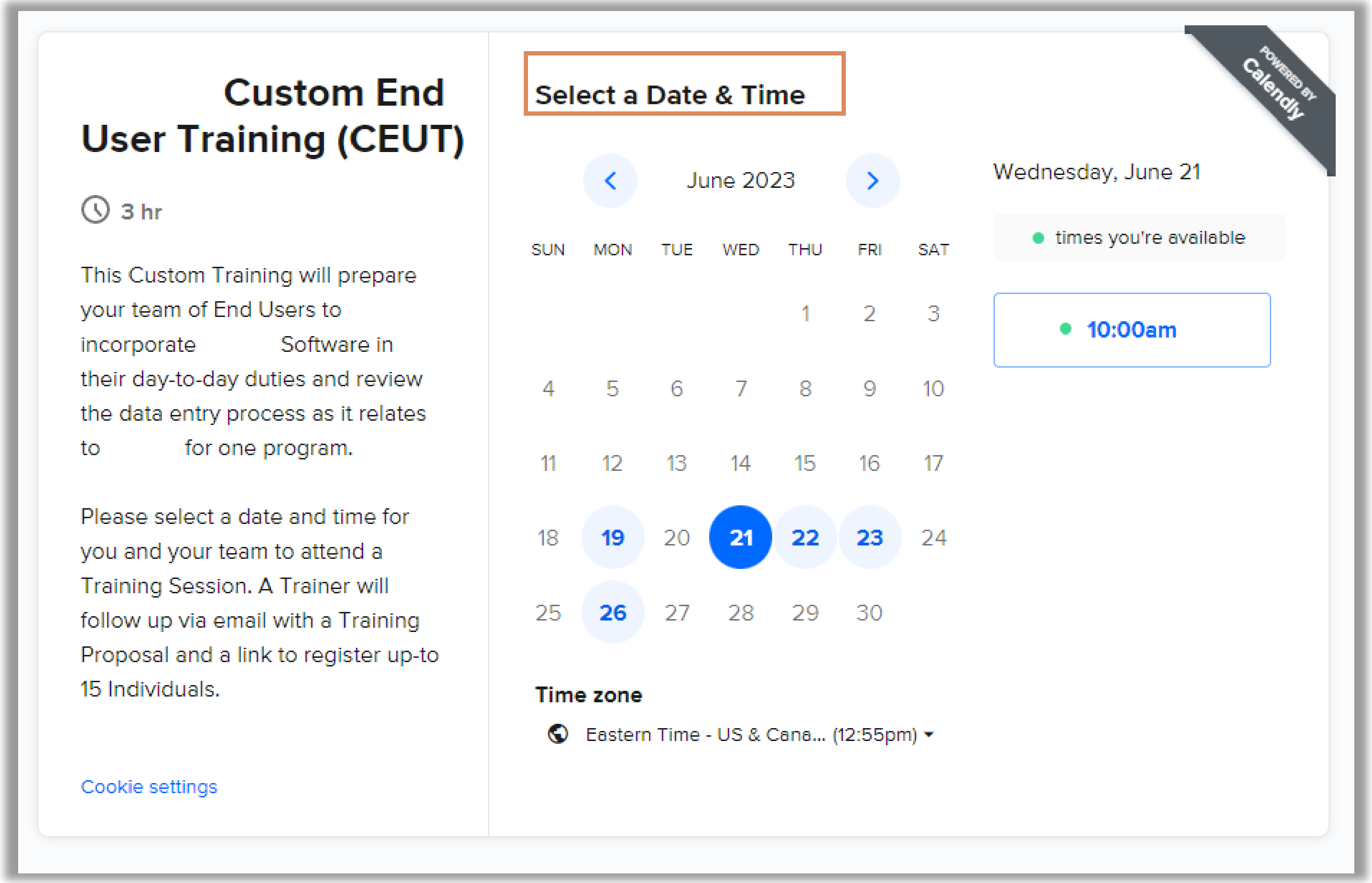
- 1 week or less before launch date



![Bonterra logo]

Training & Supporting Staff

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



Bonterra

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

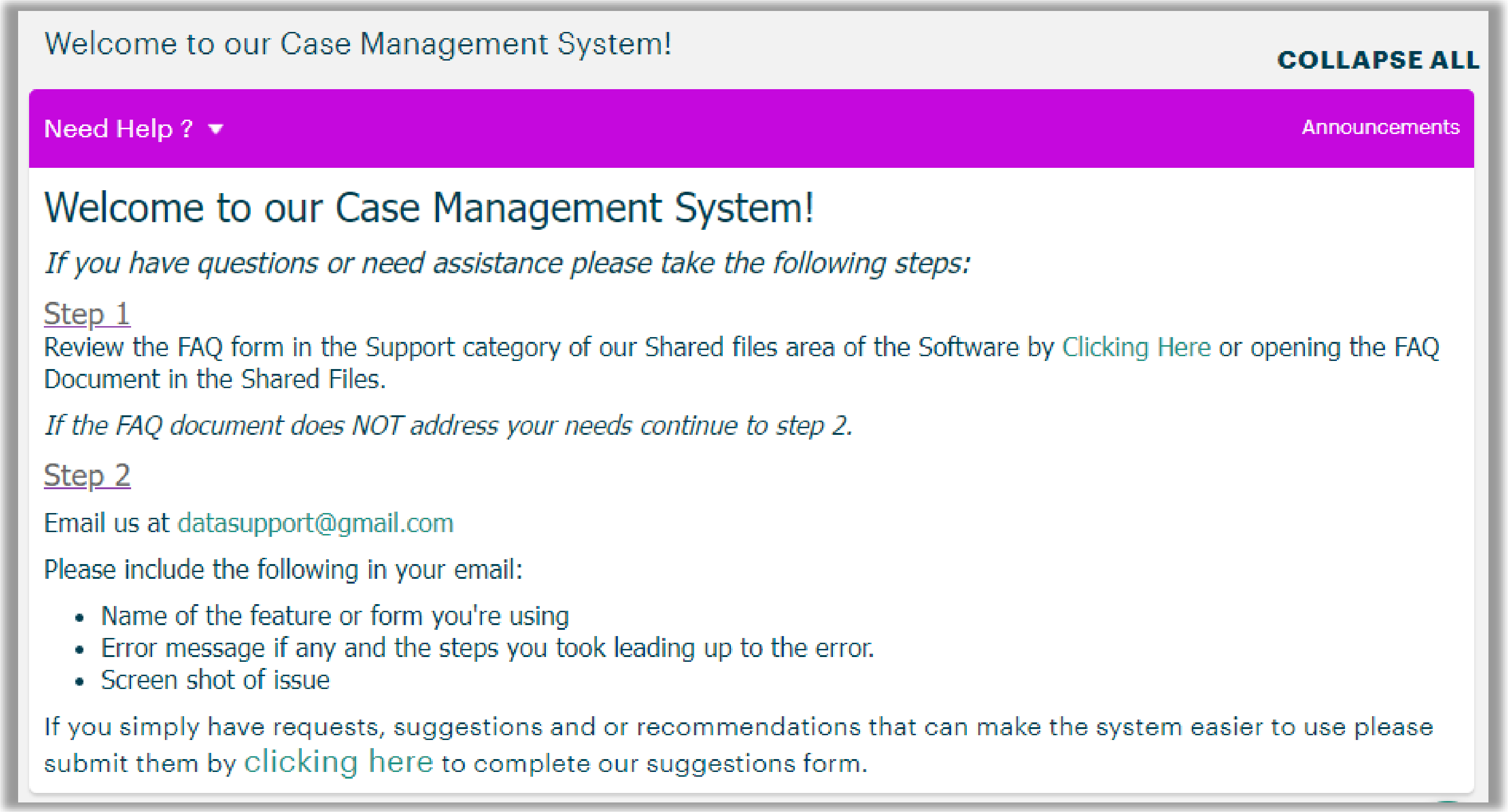
Logistics

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

Training & Supporting Staff

<u>Logistics</u>

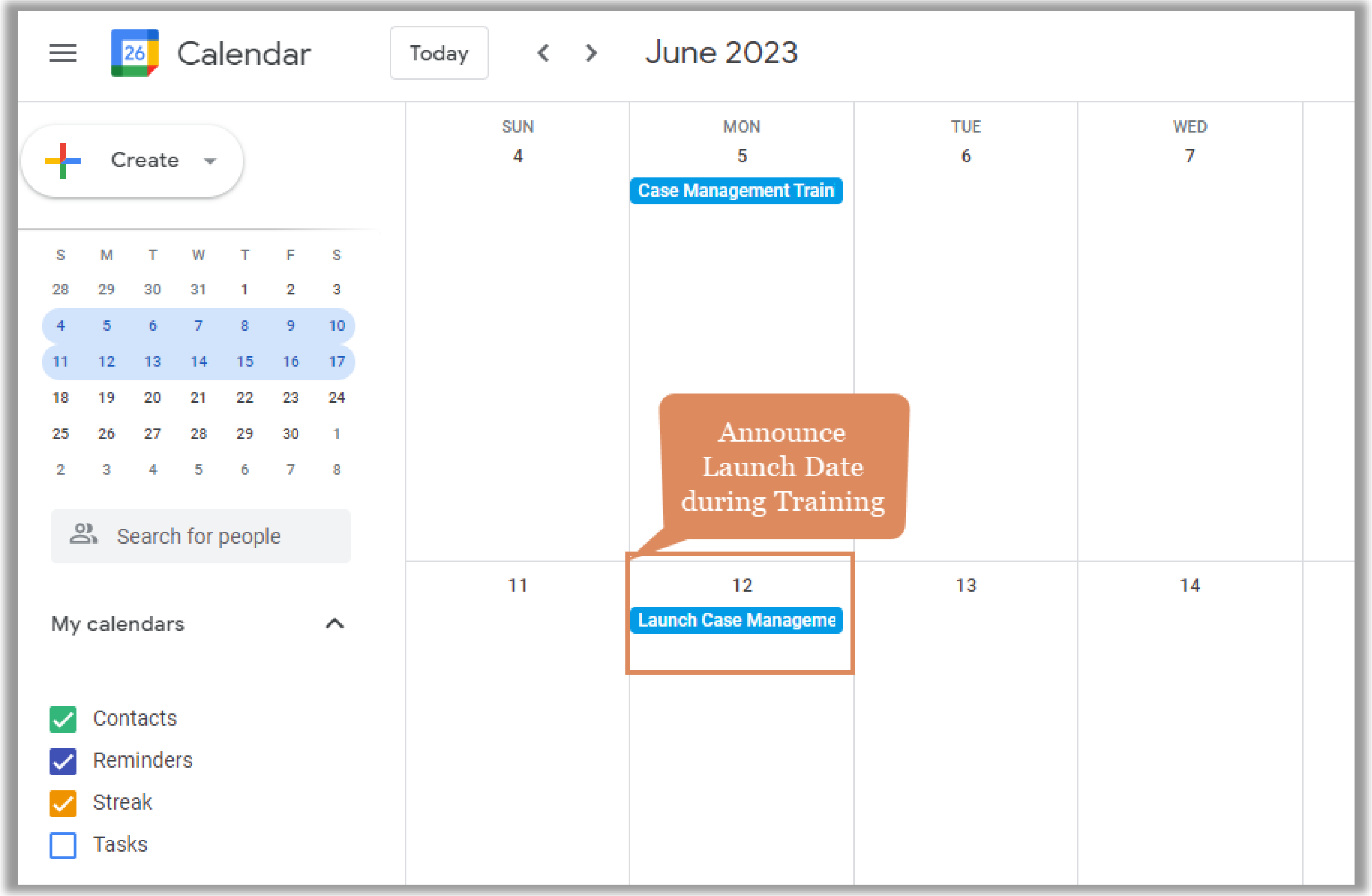
- Virtual
- In Person
  - Projector
  - Wi – fi
  - Computers
- Track Suggestions
- Plan for support after training



Training & Supporting Staff

Logistics

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



Bonterra

Training & Supporting Staff

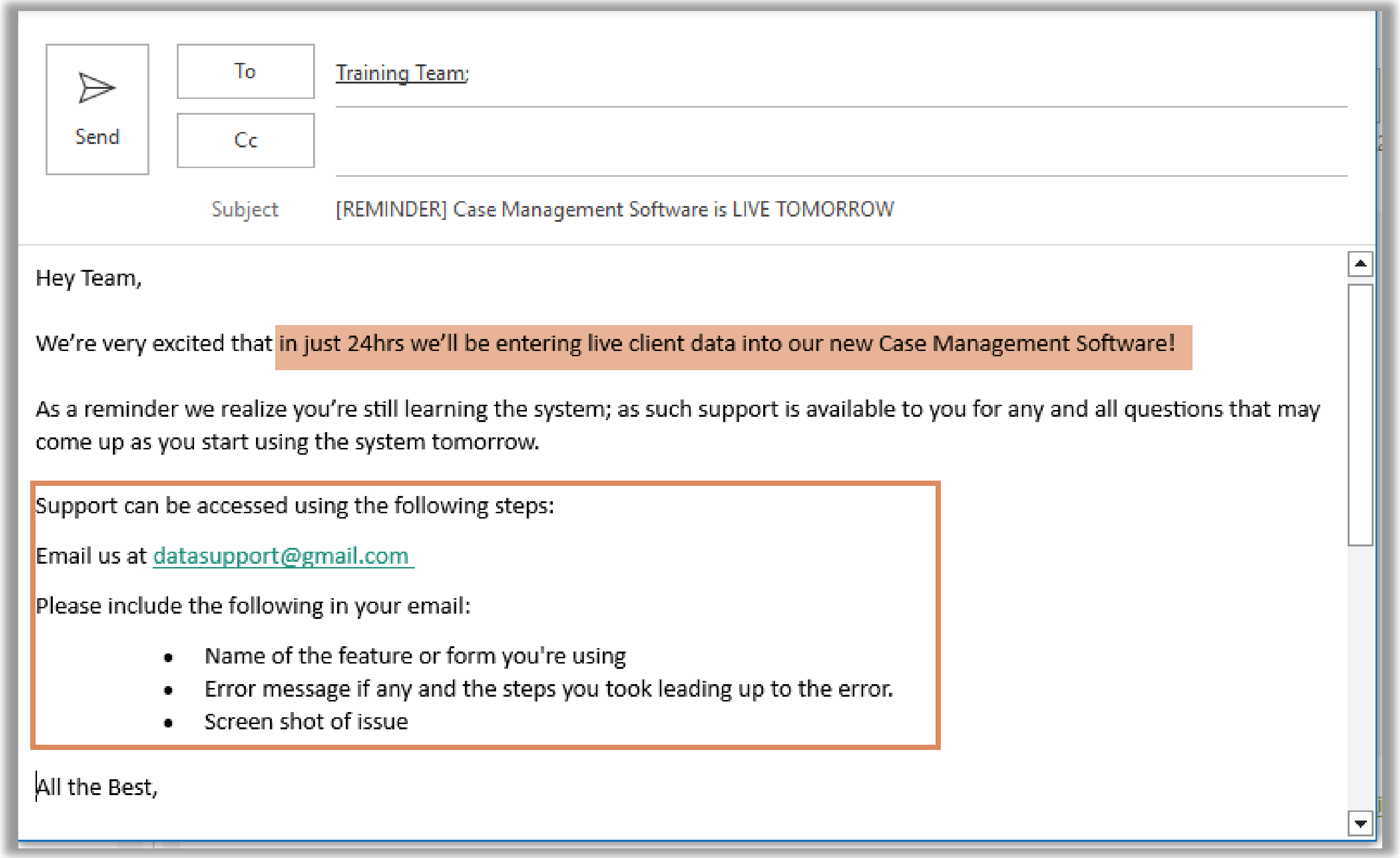
<u>To-Do Day Before Launch</u>

- Archive fake records

Training & Supporting Staff

<u>To-Do Day Before Launch</u>

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



Bonterra

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!

Bonterra™

Thank you for attending!

We hope to see you
in future trainings.

Bonterra™