

Apricot

Supporting New Users: A Best Practice Guide

Meet Your Trainer

First Name Last Name

Training & Development Associate

Learning Objective

Introduce Administrators to the best features in the software that can help you support your team in building good data entry habits in Apricot.

Agenda

Supporting Good Log In Habits via Record Audits

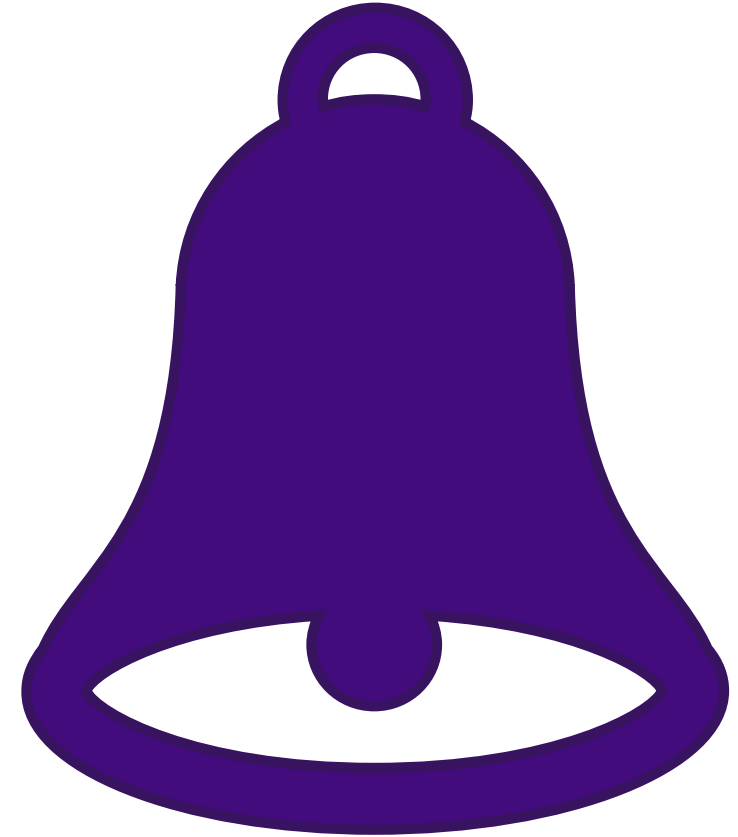
Trouble Shooting “Missing” Data via Record Audits

Data Clean Up via Archive Records

Supporting Good Login Habits

Supporting Good Login Habits

- Helpful during initial Go Live
- Email Reminders
- Team Meetings



Supporting Good Login Habits

- Record Audits Tool

The screenshot displays the 'Record Audits' interface. On the left is a dark teal navigation sidebar with the following items: Form Designer, Report Center, Record Manager (expanded), Imports, Archived Records, Record Audits (highlighted in orange), Access Control, Workflow Station, External Access, Connect, Customer Care, and Help Center. The main content area is titled 'Record Audits' and features a 'Filters' section with a 'Reset Filters' button. The filters are organized as follows:

- User Filter:** Two dropdown menus set to '--All Programs--' and '--All Users--'.
- Action Filters:** A list of checkboxes for various actions. The 'User logged in' checkbox is checked and highlighted with an orange box. Other actions include 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), Role Created, and Program Added.
- Form Filter:** A dropdown menu set to '--All Forms--'.
- Start Date:** A date input field containing '06/01/2021' with a calendar icon.
- End Date:** A date input field containing '04/08/2023' with a calendar icon.
- Limit:** A text input field containing '100'.

A 'Search' button with a magnifying glass icon is located in the bottom right corner of the main content area.

Supporting Good Login Habits

- Record Audits Tool
- Unlisted users **have not** logged in

Results						Export Results
User Name	Form Name ▼	Tier 1 Record Name ▼	Record ID ▼	Action ▼	Time ▲	
Sabrina Gilbert (SSG)	Users			User logged in	04/07/2023 2:03 PM CDT	
Kyle Della Rocca (SSG)	Users			User logged in	02/15/2023 11:32 AM CST	
Taylor Roderick (SSG)	Users			User logged in	02/15/2023 10:13 AM CST	
Sabrina Gilbert (SSG)	Users			User logged in	02/10/2023 1:24 PM CST	
Kyle Della Rocca (SSG)	Users			User logged in	01/25/2023 10:55 AM CST	
Zoe Rivkind (SSG)	Users			User logged in	05/26/2022 3:29 PM CDT	
Mary Broome (SSG)	Users			User logged in	03/02/2022 5:10 PM CST	
Asnake Hailegiorghis (SSG)	Users			User logged in	11/24/2021 11:24 AM CST	
Taylor Roderick (SSG)	Users			User logged in	07/15/2021 12:53 PM CDT	

Trouble Shooting “Missing” Data

Trouble Shooting “Missing” Data via Record Audits

Questions to Ask:

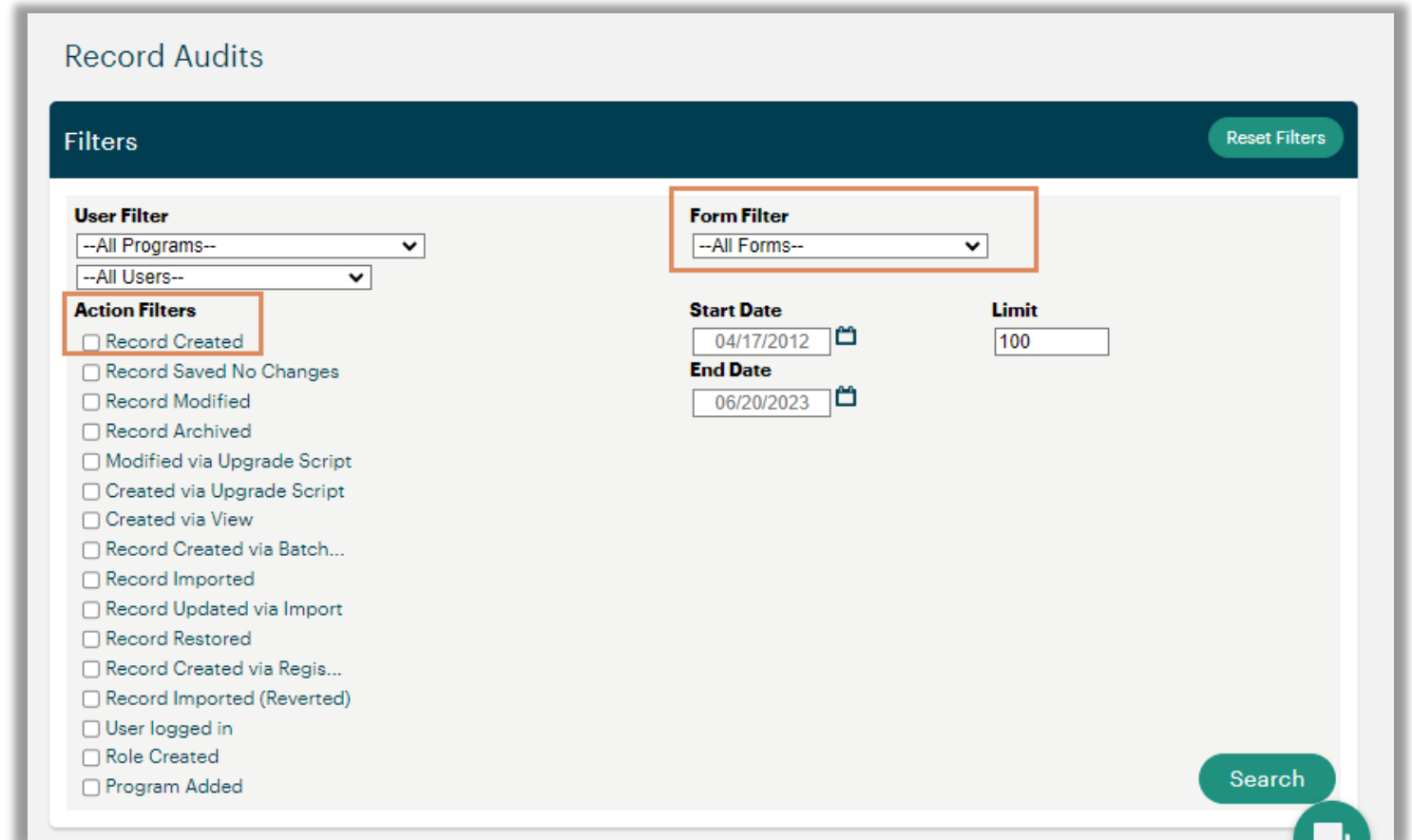
- Did the data save?
- Has the data been changed?
- Has the record been archived?
- What program is the record assigned to?



Trouble Shooting “Missing” Data via Record Audits

Record Audit Action Filters to use:

- Record Created



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
- Role Created
- Program Added

Start Date 04/17/2012

End Date 06/20/2023

Limit 100

Search

Trouble Shooting “Missing” Data via Record Audits

Record Audit Action Filters to use:

- Record Created
- Record Modified

The screenshot displays the 'Record Audits' interface. At the top, there is a 'Filters' section with a 'Reset Filters' button. Below this, the 'User Filter' section contains two dropdown menus: '--All Programs--' and '--All Users--'. The 'Form Filter' section contains a dropdown menu: '--All Forms--'. The 'Action Filters' section contains a list of checkboxes, with 'Record Modified' highlighted by an orange box. The 'Start Date' field is set to '04/17/2012' and the 'End Date' field is set to '06/20/2023'. The 'Limit' field is set to '100'. A 'Search' button is located at the bottom right of the interface.

Trouble Shooting “Missing” Data via Record Audits

Record Audit Action Filters to use:

- Record Created
- Record Modified
- Record Archived

The screenshot displays the 'Record Audits' interface. At the top, there is a 'Filters' section with a 'Reset Filters' button. Below this, there are several filter categories:

- User Filter:** Two dropdown menus, one for 'Programs' (set to '--All Programs--') and one for 'Users' (set to '--All Users--').
- Form Filter:** A dropdown menu set to '--All Forms--', highlighted with an orange box.
- Action Filters:** A list of checkboxes for various actions. The 'Record Archived' checkbox is highlighted with an orange box.
- Start Date:** A date input field set to '04/17/2012' with a calendar icon.
- End Date:** A date input field set to '06/20/2023' with a calendar icon.
- Limit:** A numeric input field set to '100'.

At the bottom right, there is a 'Search' button.

Trouble Shooting “Missing” Data via Record Audits

Record Audit Action Filters to use:

- Record Created
- Record Modified
- Record Archived
- Program Added

The screenshot displays the 'Record Audits' interface. At the top, there is a 'Filters' section with a 'Reset Filters' button. Below this, there are several filter categories:

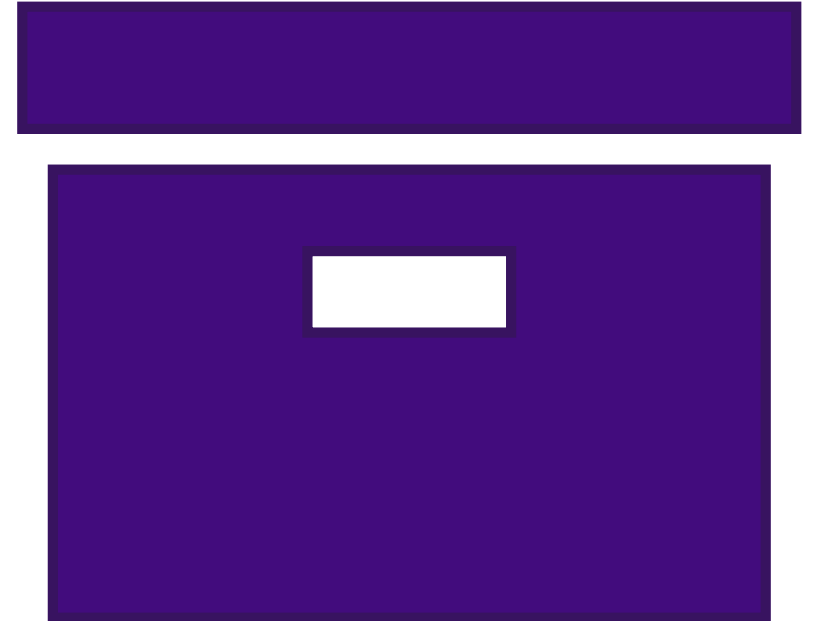
- User Filter:** Two dropdown menus, one for '--All Programs--' and one for '--All Users--'.
- Form Filter:** A dropdown menu for '--All Forms--', highlighted with an orange box.
- Action Filters:** A list of checkboxes for various actions. The 'Program Added' checkbox at the bottom is highlighted with an orange box.
- Start Date:** A date input field showing '04/17/2012' with a calendar icon.
- End Date:** A date input field showing '06/20/2023' with a calendar icon.
- Limit:** A text input field showing '100'.

At the bottom right of the interface, there is a 'Search' button.

Data Clean Up

Data Clean Up via Archived Records

- Remove fake records
- Remove duplicated Tier 2 data
- Remove inaccurate Tier 2 data
- Admin **only** by default



Data Clean Up via Archived Records

Steps

1. Open the desired record in the edit view
2. Click Archive Record in Record Actions palette
3. Notice the record is no longer visible when searching

The screenshot displays the 'Service Tracking' form for a record titled 'Sarah Greene'. The form includes several fields: a date field for '*Service Date' (06/14/2023), a radio button selection for 'Service Location/Method' (with 'In-Person Office' selected), a dropdown for '*Service Type' (set to 'Counseling - Group Session'), and a time field for '*Service Time in Hours' (2.00). On the right side, a 'Record Options' palette is visible, containing buttons for 'Save Record', 'Print Mode', 'Archive Record' (highlighted with an orange border and a '2' in a circle), 'View History', 'New Service Tracking', 'View Folder', and 'Go To Search'. A 'COLLAPSE ALL' button is located at the top right of the palette. A '1' in a circle highlights the 'Service Information' header. Below the form, there are sections for 'Attached Enrollments' (with an 'Attach to Enrollment' button), 'Assigned Programs' (listing 'Better Homes Counseling Empowering Families' and a 'Program Access' button), and a 'Record Save Checklist' (with 'Required Field Checks' and 'Field Validation Check' items). A 'Last Saved' dropdown is at the bottom right, accompanied by a green circular icon with a white document symbol.

Data Clean Up via Archived Records

- Archived data **is not deleted** but **does not** show in reports
- Can be viewed in Admin Tab
- Can be restored if needed

The screenshot shows a software interface with a dark teal sidebar on the left and a main content area on the right. The sidebar contains the following menu items: Form Designer, Report Center, Record Manager (expanded), Imports, Archived Records (highlighted with an orange border), and Record Audits. The main content area is titled "Archived Records" and has an "EXPAND ALL" button in the top right. Below the title is a dark teal header with the text "Select a form to search its archived records". The main area displays a list of forms with their archived record counts and action buttons:

Form Name	Archived Records Count	Actions
Participant Profile	0 Archived Records	Actions ▶
Program Enrollment and Exit	3 Archived Records	Actions ▶
Service Tracking	31 Archived Records	Actions ▶
Workshop Attendance	1 Archived Records	Actions ▶
Users	5 Archived Records	Actions ▶

A search bar is located at the bottom right of the main content area, with a "Search" button highlighted in orange. A mouse cursor is pointing at the "Actions" button for the "Workshop Attendance" form.

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.