

Understanding Your Apricot Design Webinar

Meet Your Trainer

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Learning Objective

This webinar will teach you how to locate the key components of your unique configuration and understand how they relate to one another.

Agenda

Solution Design Document

Sites, Programs & Roles

Forms

Reports

Solution Design Document

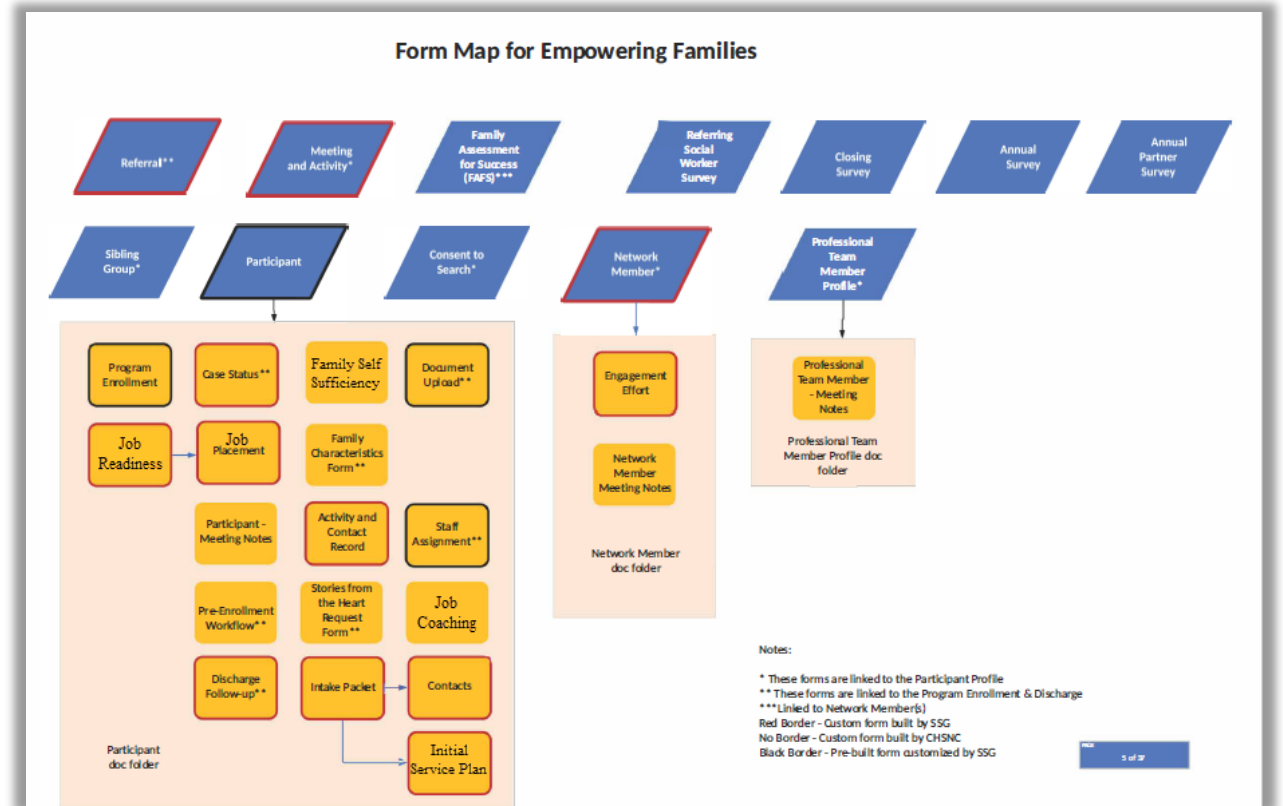
Solution Design Document

- Created during initial implementation



Solution Design Document

- Created during initial implementation
- Details original design & workflow



Solution Design Document

- Created during initial implementation
- Details original design & workflow
- Reach out to Account Manager for access
- *NOTE: Does not reflect modifications post implementation



Sites, Programs & Roles

Site(s)

- View from Administrator Tab
 - Under Sites & Programs

The screenshot displays the Apricot Administrator interface. At the top, there is a navigation bar with a 'MENU' icon, 'MY APRICOT' with a '1' badge, 'ADMINISTRATOR', 'All Sites' with a 'Program All Programs' dropdown, a 'CHANGE' button, and a user profile for 'Sabrina Gilbert'. The left sidebar contains a menu with items: 'Form Designer', 'Report Center', 'Record Manager', 'Access Control' (expanded to show 'Users'), '2 Sites & Programs' (highlighted with a hand cursor), 'Product', 'Areas/Roles', and 'Bulk Assignments'. The main content area shows a 'Welcome to Apricot Customer Care!' message, a 'Customer Care Center' heading, and a list of links: 'CUSTOMER SUPPORT', 'ARTICLES & VIDEO', 'ADD USERS/TOOLS', 'ACCOUNT INFO', and 'TRAINING RESOURCES'. A 'COLLAPSE ALL' button is visible in the top right of the main content area.

Site(s)

- View from Administrator Tab
 - Under Sites & Programs
- Admins have all access by default
- User access can be restricted

The screenshot displays the 'Sites & Programs' management interface. On the left is a dark teal sidebar with a 'Back' button and a 'Sites & Programs' menu item. The main content area has a header with 'Sites & Programs', a search box, and two green buttons: 'Create New Site +' and 'Create New Program +'. Below the header is a filter dropdown set to 'All Sites & Programs'. A table lists the following data:

NAME	MODIFIED	STATUS	
+ NJ Helping H...	2/16/2023	Active	👁
+ NY Helping ...	2/16/2023	Active	👁

Program(s)

Nested within Sites

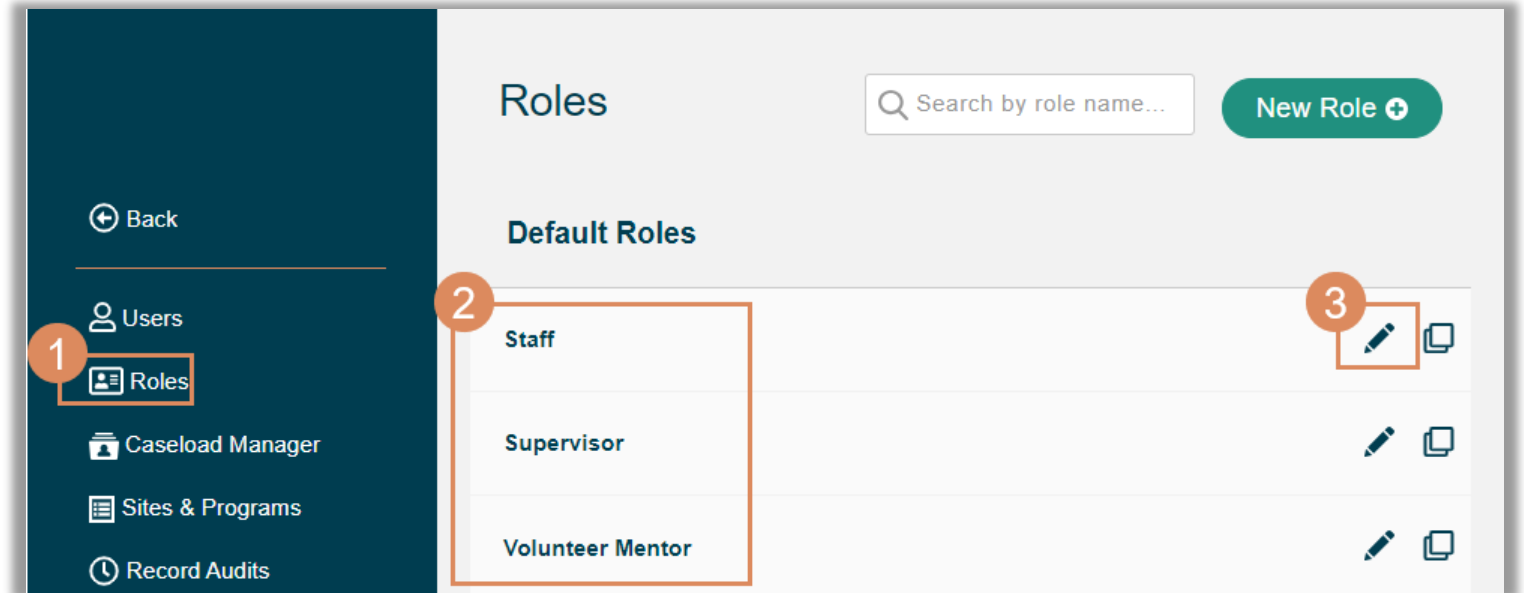
Click toggle next to Site to view

The screenshot shows a web interface for 'Sites & Programs'. On the left is a dark teal sidebar with a 'Back' button and a 'Sites & Programs' menu item. The main content area has a header with a search bar, 'Create New Site' button, and 'Create New Program' button. Below is a table titled 'All Sites & Programs' with columns for NAME, MODIFIED, and STATUS. The table lists four programs, all with a status of 'Active' and a modified date of '2/16/2023'. The first row is 'NJ Helping H...', the second is 'NY Helping ...', the third is 'NY Empowering Families', and the fourth is 'NY Better Homes'. Callout '1' points to the expand/collapse toggle for 'NY Helping ...', and callout '2' points to the 'NY Empowering Families' row.

NAME	MODIFIED	STATUS
⊕ NJ Helping H...	2/16/2023	Active
⊖ NY Helping ...	2/16/2023	Active
NY Empowering Families	2/16/2023	Active
NY Better Homes	2/16/2023	Active

Roles

- Shows features users can access
- Shows actions users can take
- Visible from the Account Management App
- Pencil icon to view details



Roles

Click pencil icon to:

View Permissions

View assigned Users

< Staff

1 DETAILS & PERMISSIONS 2 ASSIGNED USERS

Role Details

NAME
Staff

DESCRIPTION
Description for a role

Permissions

Undo Redo

FORMS REPORTS AGGREGATE REPORTS BULLETINS REFERRALS SHAR

PROG.	VIEW
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Roles

Permissions Tab

- Each feature has a subtab
- Each column is a different action
- Check = user **can** take that action with that feature
- Unchecked = user **cannot** take that action with that feature.

Role Details

NAME
Staff

DESCRIPTION
Description for a role

Permissions Undo Redo

FORMS REPORTS AGGREGATE REPORTS BULLETINS REFERRALS SHARED FILES

PROG. SPECIFIC	NAME	VIEW	SEARCH	CREATE	EDIT	ARCHIVE
<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Bulk Service / Large Event	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Client Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	ACE Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Roles

Assigned Users

- Grouped by program
- Click toggle to view list

The screenshot shows a mobile application interface for 'Staff'. At the top, there is a back arrow and the title 'Staff'. Below the title, there are two tabs: 'DETAILS & PERMISSIONS' and 'ASSIGNED USERS'. Callout 1 points to the 'ASSIGNED USERS' tab. Below the tabs is a section titled 'Assigned Users' with a search bar on the right. Callout 2 points to a toggle icon (a minus sign in a circle) next to 'Adult Case Management NY'. Below this is a table with two columns: 'USER NAME' and 'EMAIL ADDRESS'. Callout 3 points to the first row of the table, which contains 'Luis Canyeda' and 'luisc@apricotfake.com'. The table also includes icons for visibility and user management for each row.

USER NAME	EMAIL ADDRESS
Luis Canyeda	luisc@apricotfake.com
Mark Craig	markc@officemail.com

Forms

Forms

- Access via Standard Form Library
- Tier 1 Forms listed first
- Tier 2 Forms nested under Tier 1 Forms

The screenshot shows the Bonterra user interface for managing forms. At the top, a navigation bar includes a 'MENU' icon, a user profile for 'ADMINISTRATOR' (annotated with a '1'), and site information 'All Sites' and 'Program All Programs'. A left-hand sidebar contains a menu with 'Form Designer' expanded, and 'Standard Forms' highlighted with a '2'. The main content area is titled 'Standard Forms' and contains a list of forms under the heading 'Select the Form You Wish to Modify Below'. The forms listed are: Incoming Referral, Participant Profile (annotated with a '3'), Program Enrollment and Exit, Individual Service Plan (ISP), Goals, Workforce Skills Assessment, TOP Case Note, Services, and Positive Parenting Assessment. Each form entry has a green folder icon and an 'Actions' link. A callout box points to the 'Participant Profile' entry, stating: 'Click the toggle next to Tier 1 form to see Tier 2 forms in Document Folder'.

Reports

Reports

- Accessed Under Reports
- Grouped by Categories
- Click Toggle next to Category to view list of reports

The screenshot shows the Bonterra Reports interface. At the top, there is a navigation bar with a 'MENU' icon, a user profile for 'ADMINISTRATOR', and site information 'All Sites Program All Programs'. A callout '1' points to the 'ADMINISTRATOR' label. On the left, a dark sidebar contains a menu with 'Reports' highlighted by a callout '2'. The main content area is titled 'Reports' and contains a list of report categories. A callout '3' points to a dropdown arrow next to 'Reports for Staff', with a text box stating 'Click toggle next to report category to view report list'. The report list includes: Leadership Team Reports, Reports for Staff (with a dropdown arrow), Pending Inquiries List, Client Demographics, Post Workforce Assessment Due, Service Stats, and Workforce Assessment Progress. Each category has an 'Actions' link and a gear icon for settings.

Reports

Edit Report to view:

- Forms data is from
- Questions from the forms data is from

Pending Inquiries NO Contact

▼ Forms

- Incoming Referral (Always)
- Outreach Form (Never)

▼ Filters

▼ Limit Sections

Report last run July 11th 2023, 4:32 pm
Click to refresh data
Results limited to the first 10 Rows.

First	Last	Date of Birth	Intake Date	Monthly Income	Date
Amara	Jones	11/02/1990	04/25/2023	800.00	
Sharon	Matthews	03/06/1979	04/13/2023	1330.00	
...

Total Rows
2

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.