Understanding Your Apricot Design Webinar

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Meet Your Trainer

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Training & Development Associate

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

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- Created during initial implementation

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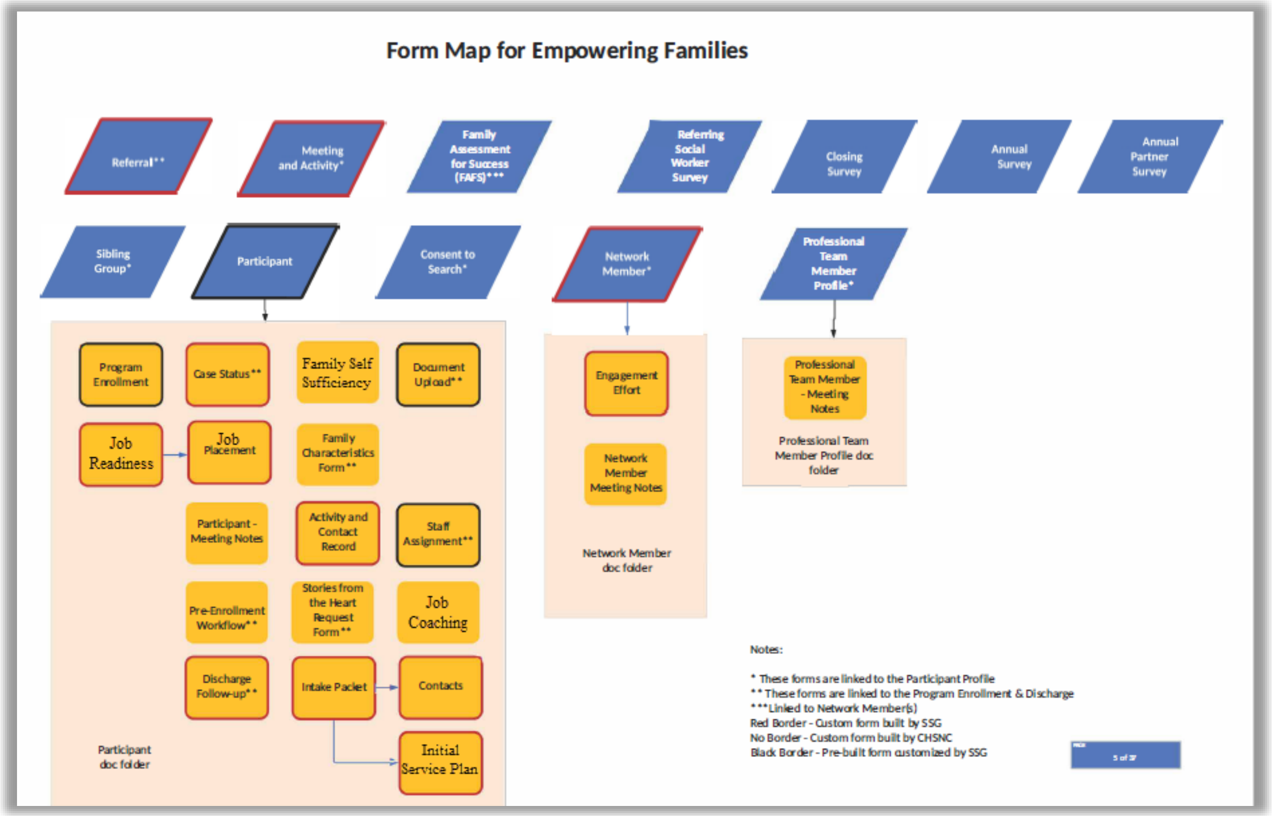
- Created during initial implementation
- Details original design & workflow



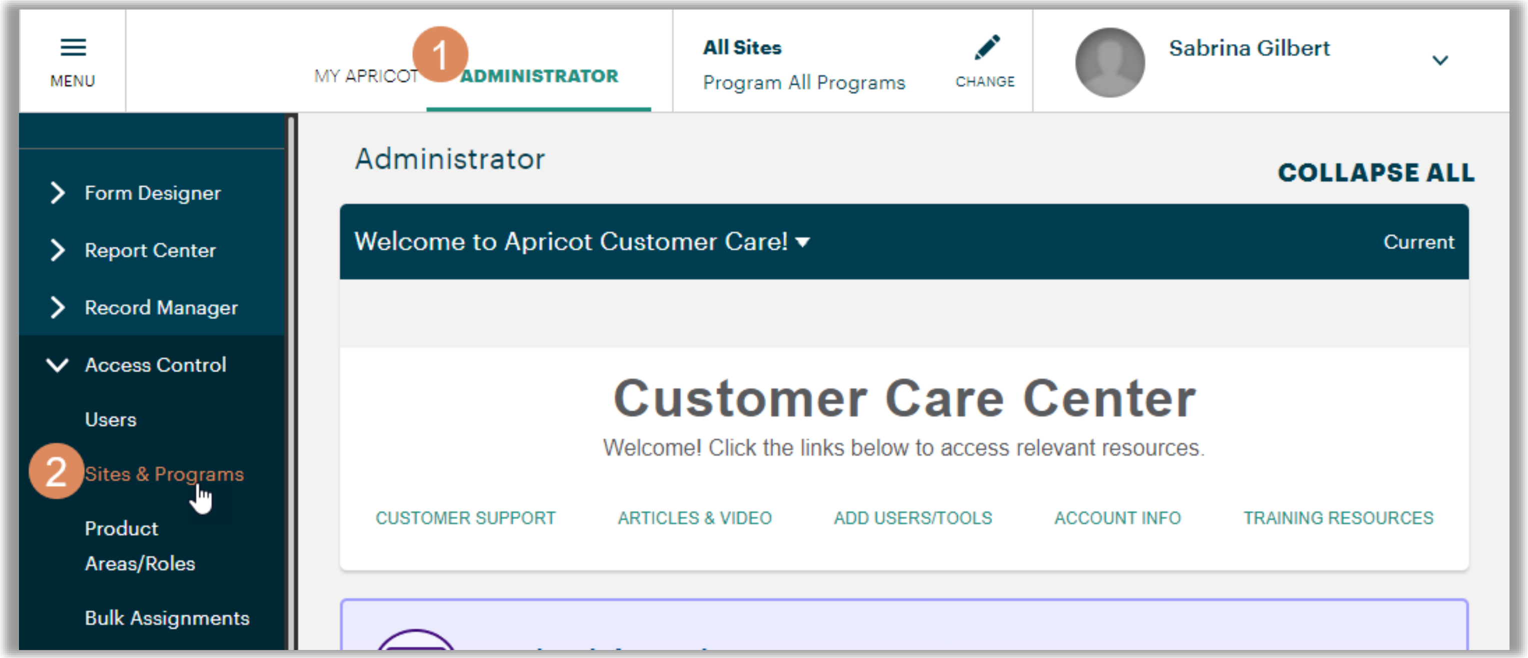
Solution Design Document

- 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

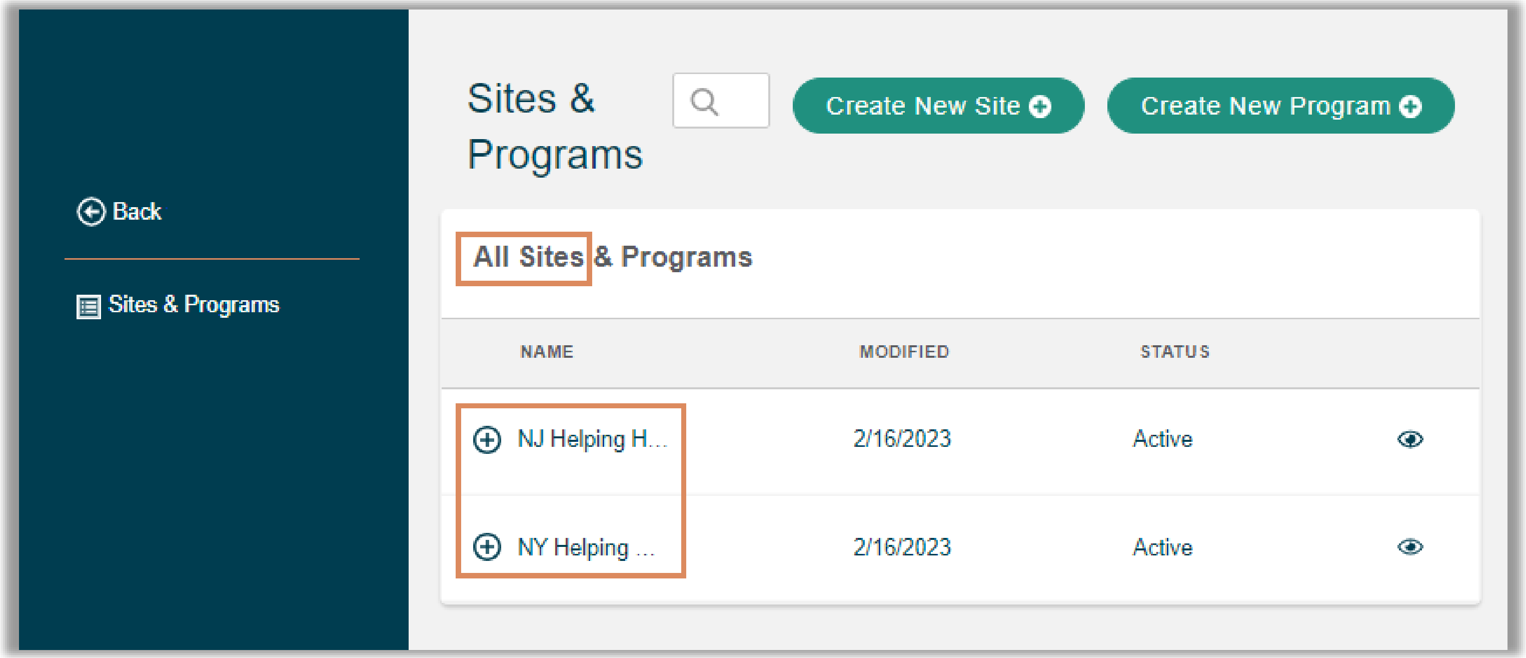
Site(s)

- View from Administrator Tab
  - Under Sites & Programs



Site(s)

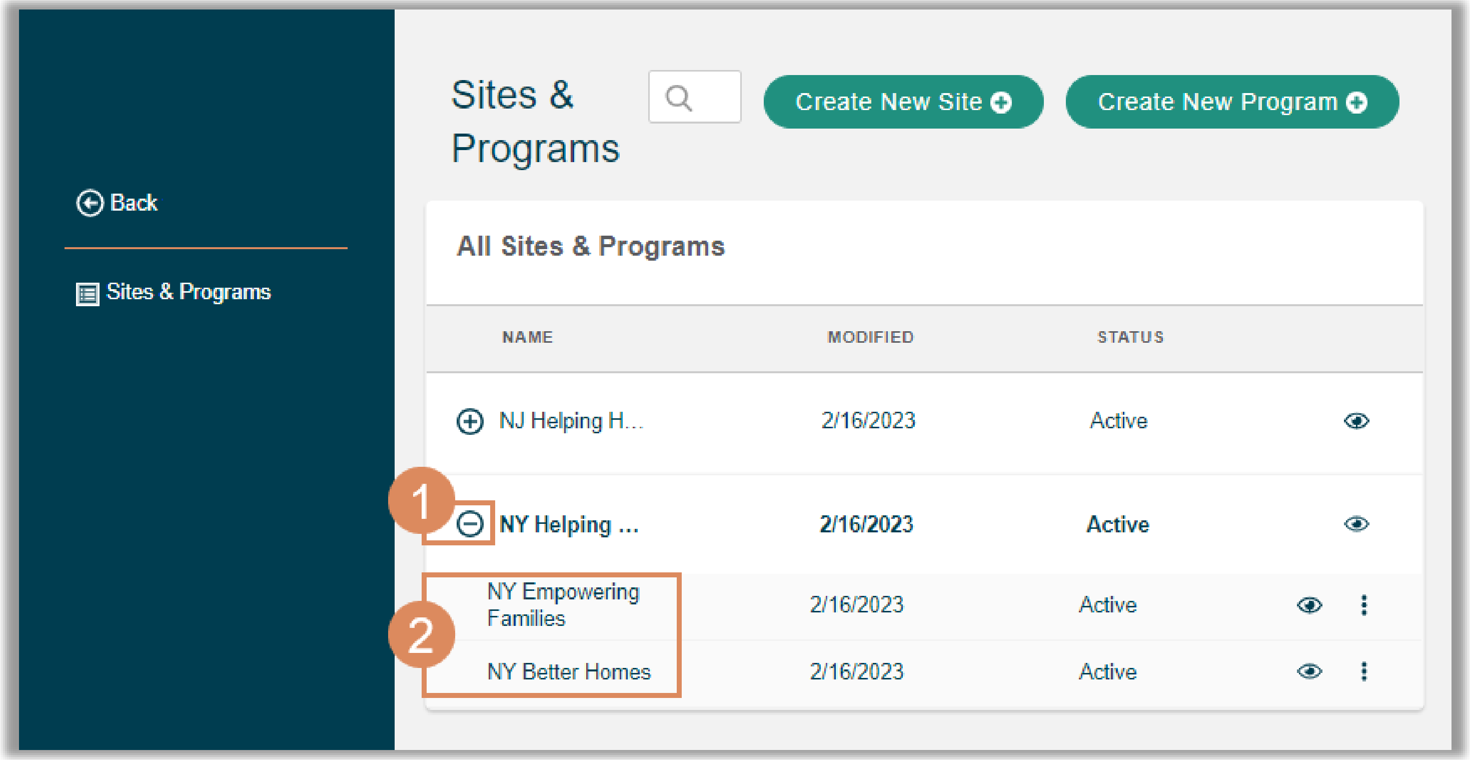
- View from Administrator Tab
  - Under Sites & Programs
- Admins have all access by default
- User access can be restricted



Program(s)

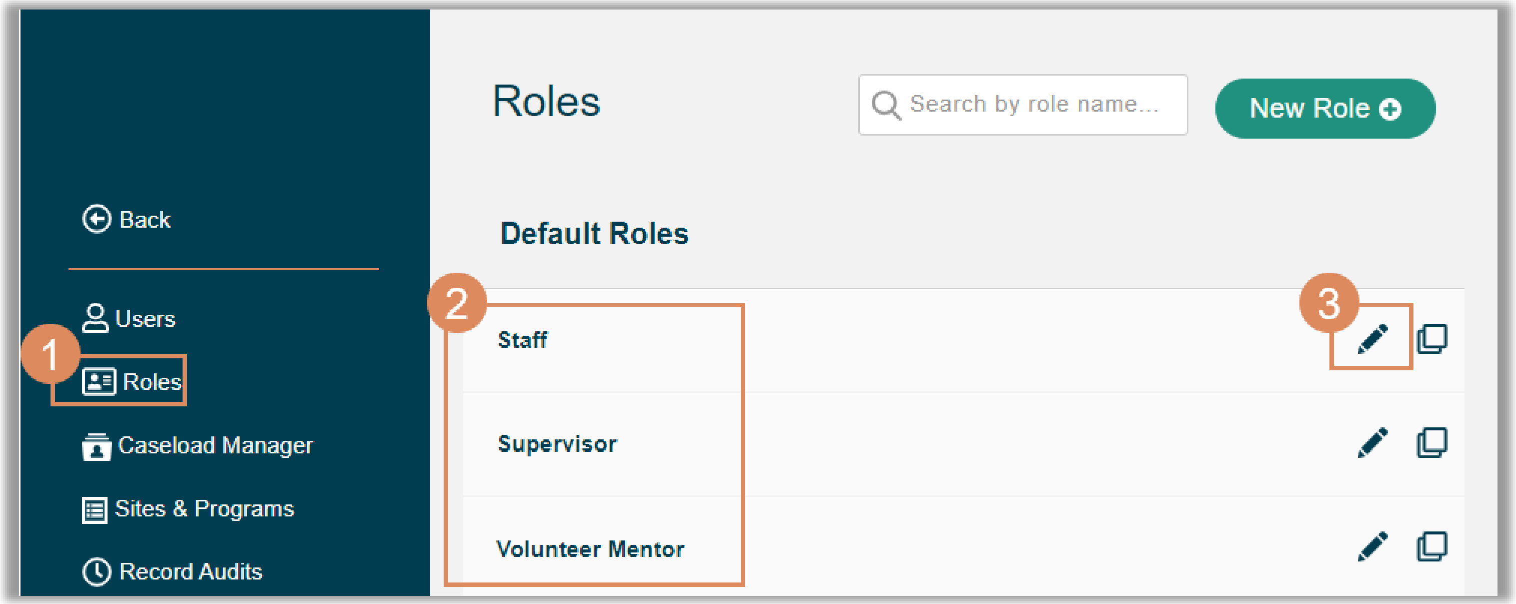
Nested within Sites

Click toggle next to Site to view



Roles

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

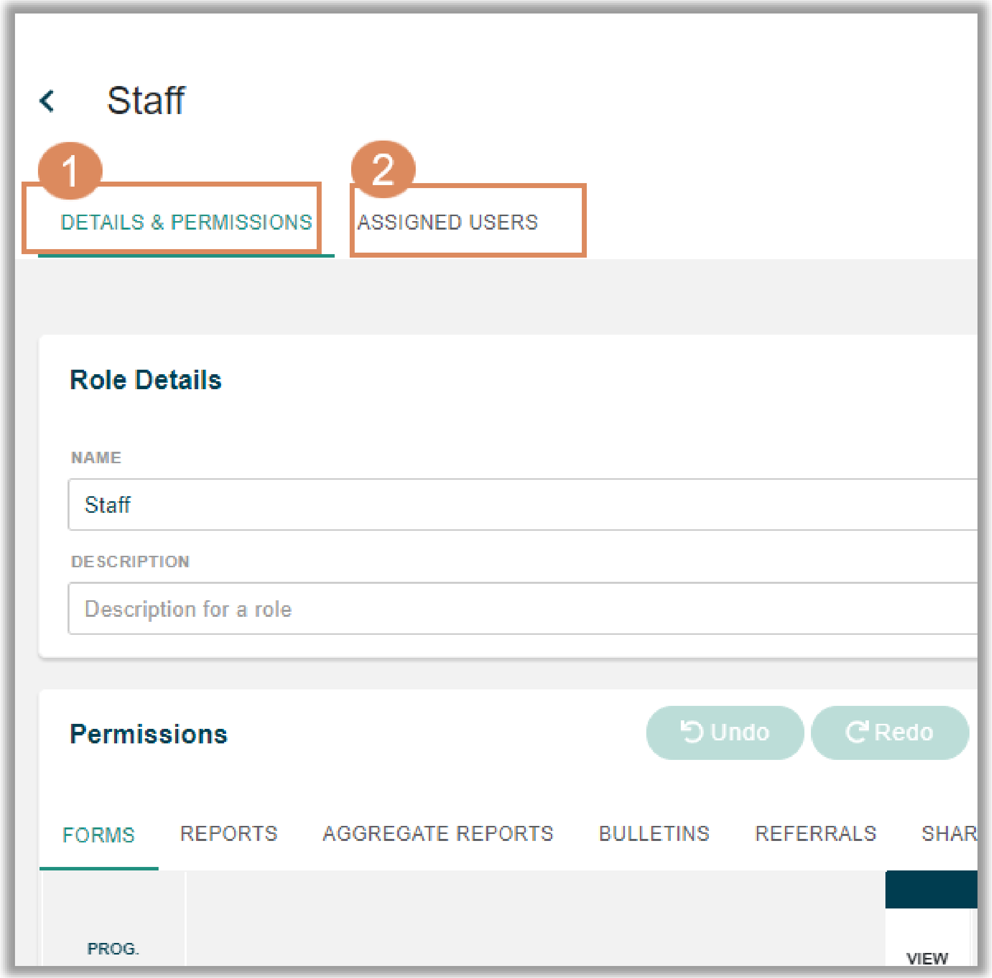


Roles

Click pencil icon to:

View Permissions

View assigned Users



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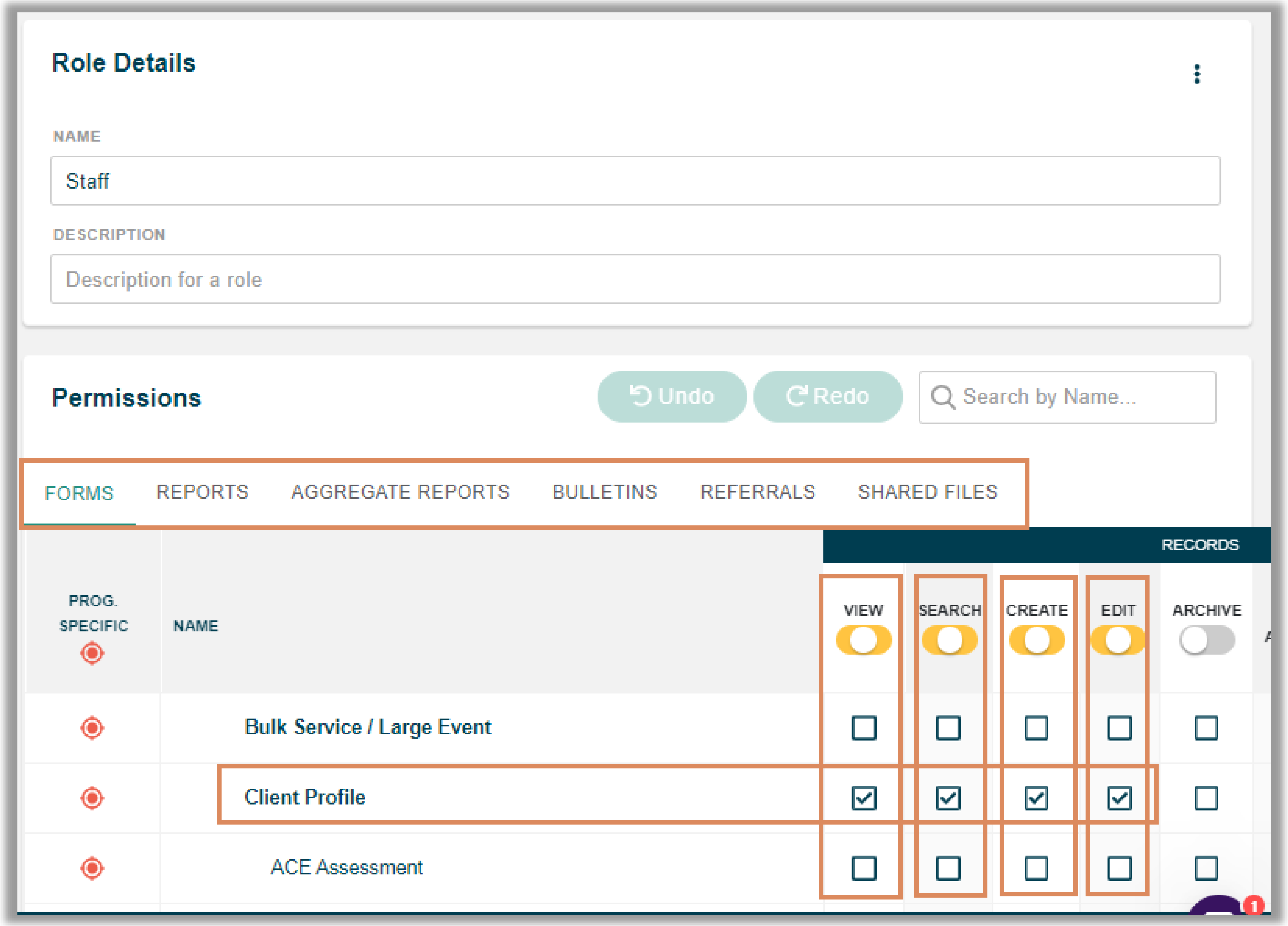
Roles

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.



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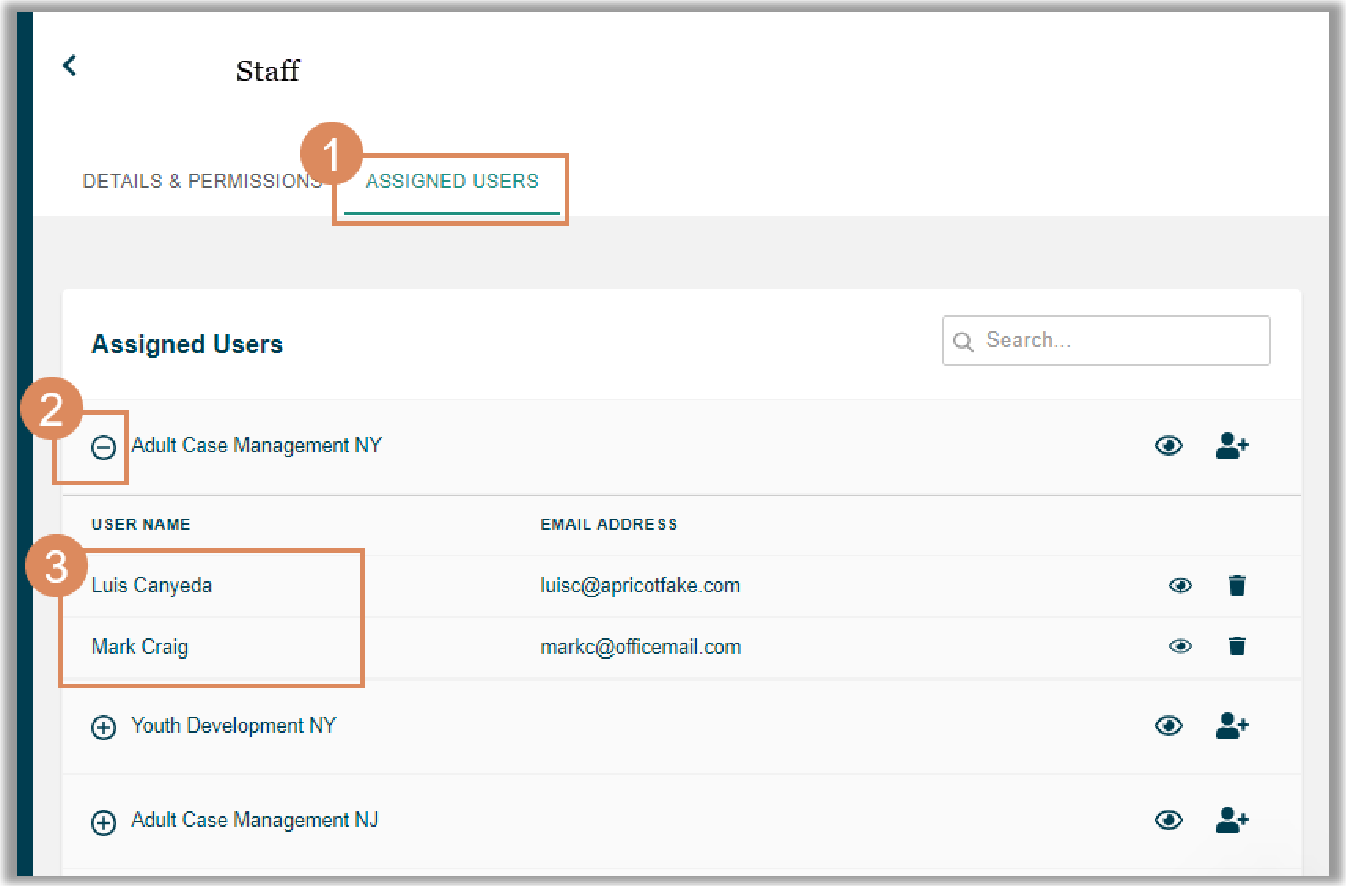
Roles

Assigned Users

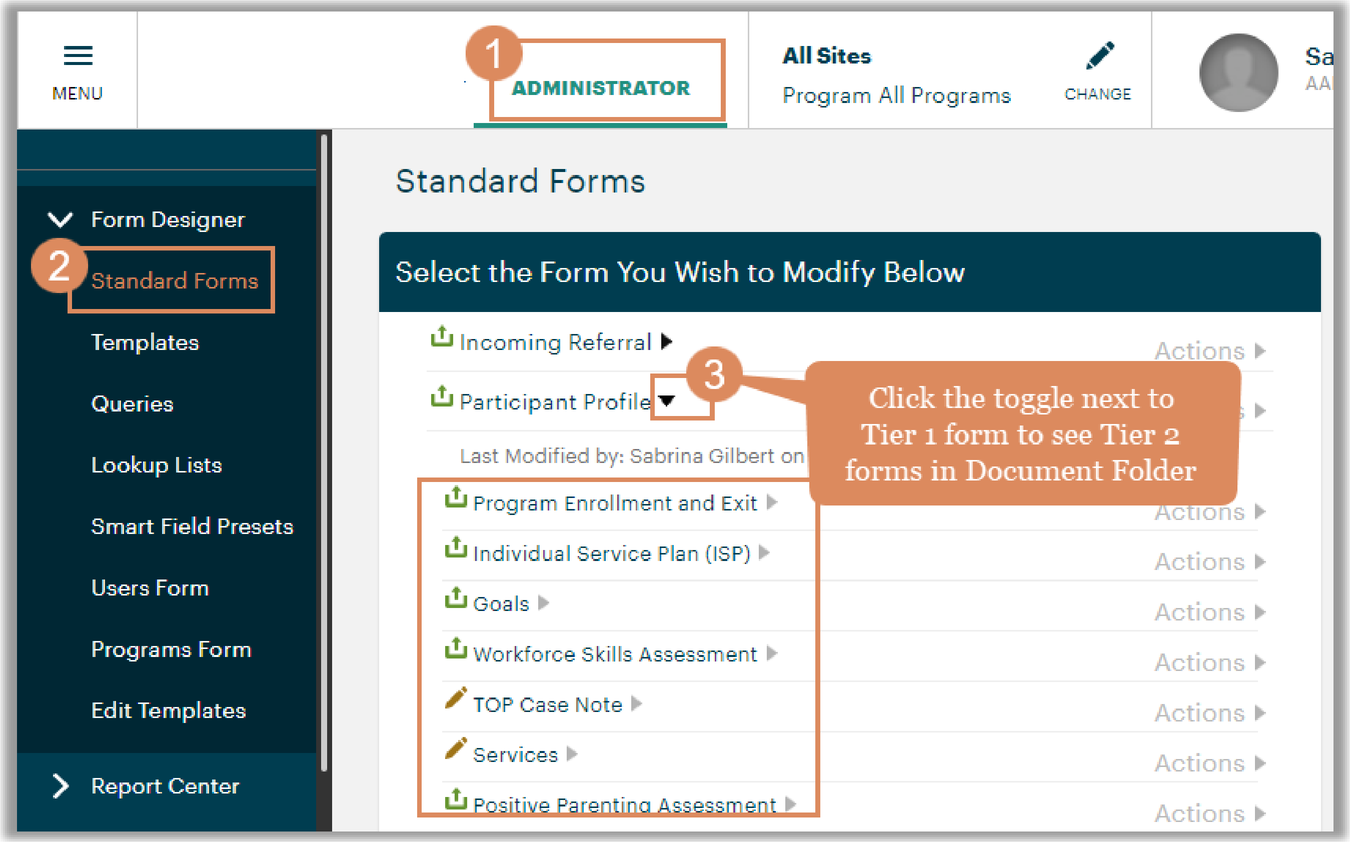
- Grouped by program
- Click toggle to view list



Forms

Forms

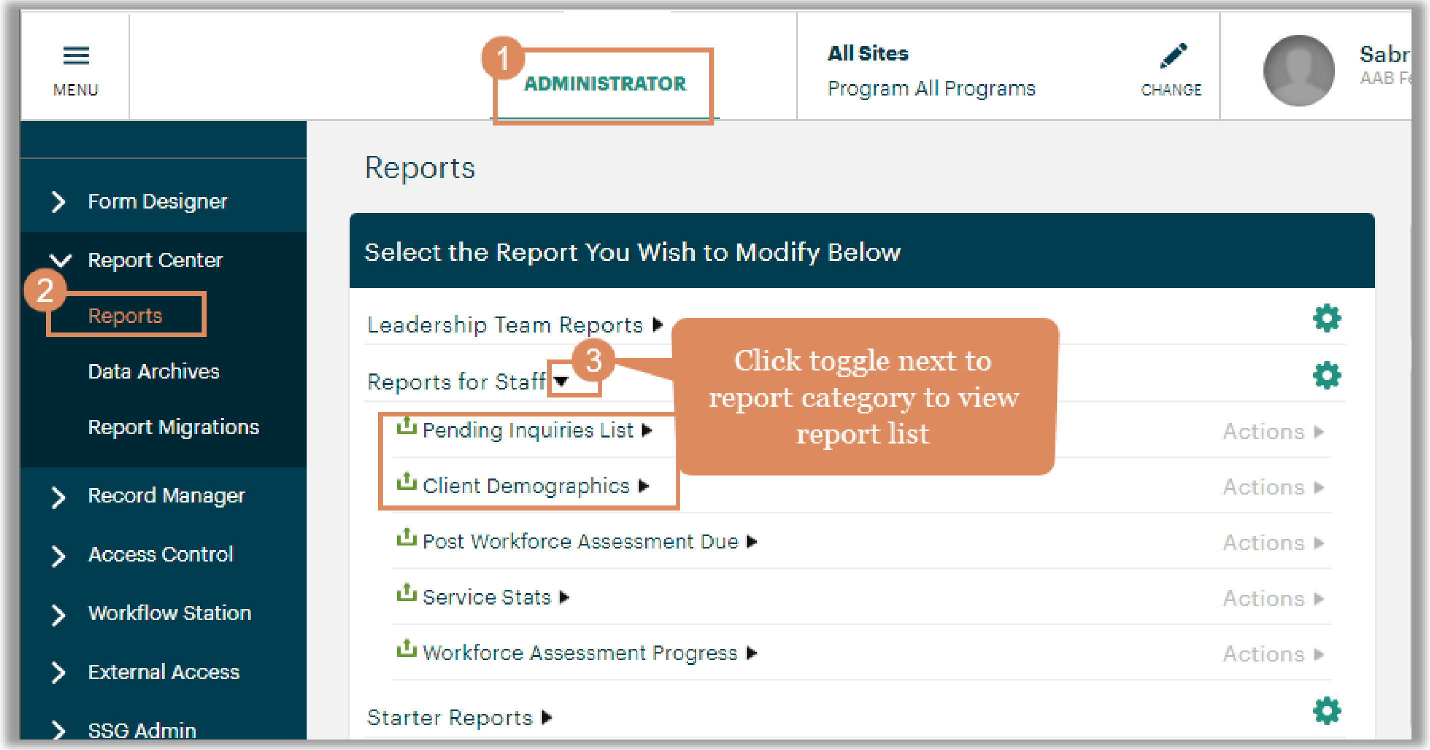
- Access via Standard Form Library
- Tier 1 Forms listed first
- Tier 2 Forms nested under Tier 1 Forms



Reports

Reports

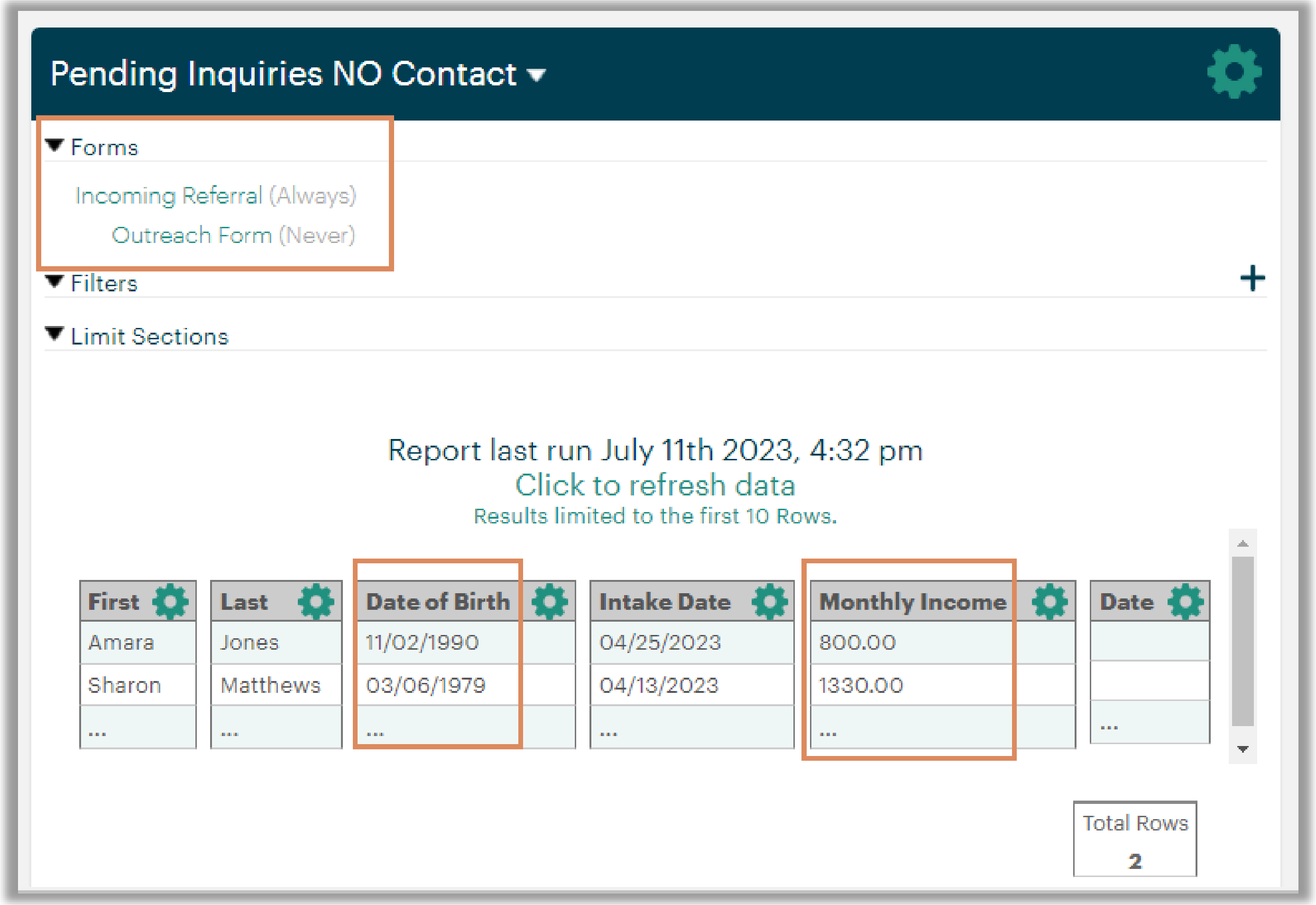
- Accessed Under Reports
- Grouped by Categories
- Click Toggle next to Category to view list of reports



Reports

<u>Edit Report to view:</u>

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



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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!

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Thank you for attending!

We hope to see you
in future trainings.