

# Apricot Entering Attendance via Registration Grid Webinar

# Meet Your Trainer

First Name Last Name

Training & Development Associate

# Learning Objective

Introduce standard users to the purpose of and best practices for entering data in Registration Grid feature in Apricot so that users can confidently use the tool as needed.

# Agenda

What is Registration Grid

Creating a Group Roster

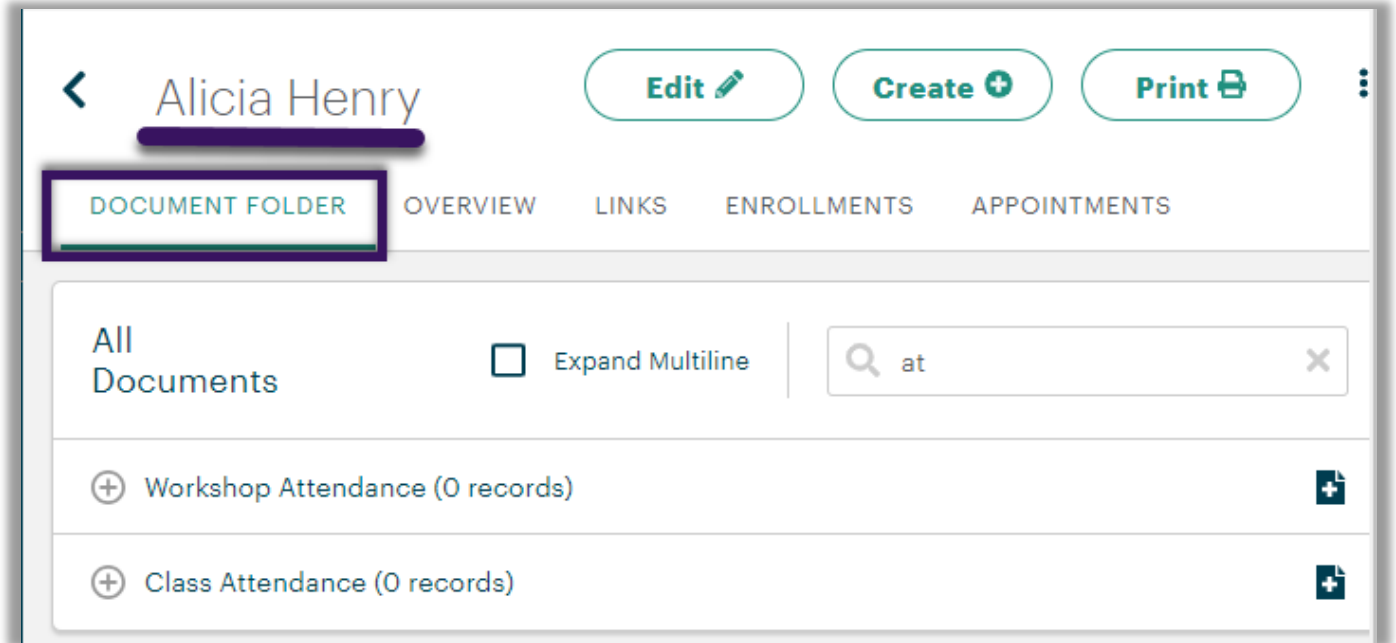
Editing Group Roster

Tracking Attendance

# What is Registration Grid

# What is Registration Grid

- Saves time tracking attendance
  - Instead of one - by - one data entry



The screenshot displays a user profile interface for 'Alicia Henry'. At the top, there are navigation buttons for 'Edit', 'Create', and 'Print'. Below the name, a 'DOCUMENT FOLDER' tab is highlighted with a purple box, alongside other tabs: 'OVERVIEW', 'LINKS', 'ENROLLMENTS', and 'APPOINTMENTS'. The main content area shows 'All Documents' with an 'Expand Multiline' checkbox and a search bar containing 'at'. Below this, there are two expandable sections: 'Workshop Attendance (0 records)' and 'Class Attendance (0 records)', each with a plus icon and a document icon.

# What is Registration Grid

- Saves time tracking attendance
  - Instead of one – by - one data entry
- Create set group roster
- Enter attendance for all registrants simultaneously

Record Attendance Here for Parent Advocacy

**Parent Advocacy**  
Quick View Information ▶

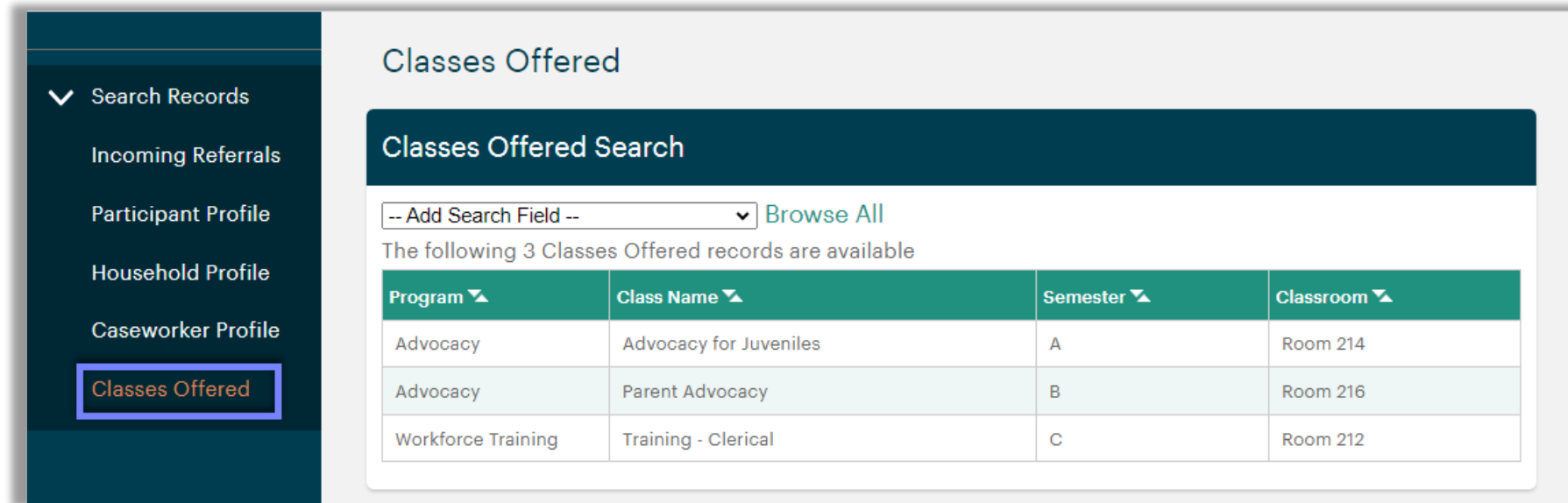
Record Attendance Here ▼

**Record Attendance**  
09/05/2023 📅 3 Update

Participant Profile 4 Records	09/05/2023	09/06/2023	09/07/2023
	<b>Attendance</b> --Please Select-- ▼	<b>Attendance</b> --Please Select-- ▼	<b>Attendance</b> --Please Select-- ▼
<a href="#">Alonzo LaBatsille</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼
<a href="#">April Billingslea</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼
<a href="#">Beth Crane</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼

# What is Registration Grid

- Accessed via Record Search
- Forms using Registration Grid are managed by Administrators
- Contact Administrator to gain access



Classes Offered

Classes Offered Search

-- Add Search Field -- [Browse All](#)

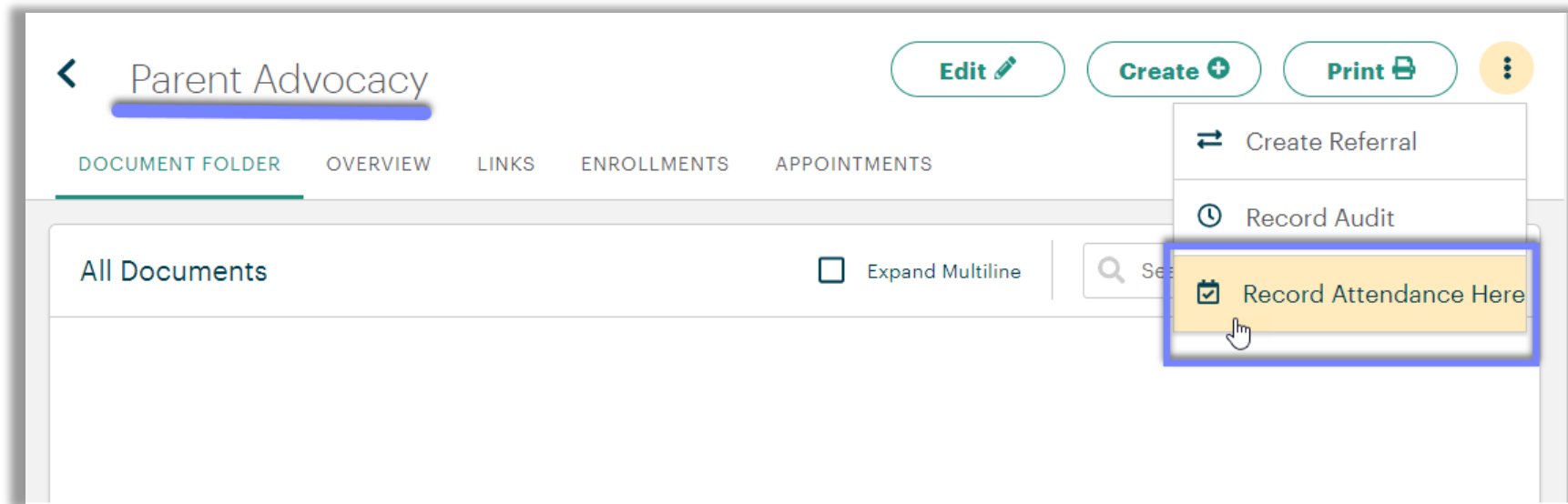
The following 3 Classes Offered records are available

Program	Class Name	Semester	Classroom
Advocacy	Advocacy for Juveniles	A	Room 214
Advocacy	Parent Advocacy	B	Room 216
Workforce Training	Training - Clerical	C	Room 212



# What is Registration Grid

- Accessed via Record Search
- Forms using Registration Grid are managed by Administrators
- Group Rosters & Attendance entered by Standard Users



# What is Registration Grid

## 2 Steps for Tracking Attendance:

1. Create Group Roster

Classes Offered

Enrollment Information ▾

\*Program

\*Class Name  \*Semester

\*Classroom

Links for Registration Grid ▾

Add attendees or registrants here  Hide Deactivated Links

Participant Profile					Link Info		
Participant Name ▾	Date of Birth ▾	Client Status ▾	Client Email ▾	Gender ▾	Active ▾	Delete	Date ▾
Sarah Greene	12/23/1987	Waiting List	sarah2532@yahoo.com	Female	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>	Added on 09/13/2023
Beth Crane	06/04/1974	Active	b.crane@gmail.com	Female	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>	Added on 09/13/2023

# What is Registration Grid

## 2 Steps for Tracking Attendance:

1. Create Group Roster
2. Track Attendance

Record Attendance Here for Parent Advocacy

**Parent Advocacy**  
Quick View Information ▶

Record Attendance Here ▼

**Record Attendance**  
09/05/2023 📅 3 Update

Participant Profile 4 Records	09/05/2023	09/06/2023	09/07/2023
	<b>Attendance</b> --Please Select-- ▼	<b>Attendance</b> --Please Select-- ▼	<b>Attendance</b> --Please Select-- ▼
<a href="#">Alonzo LaBatsille</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼
<a href="#">April Billingslea</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼
<a href="#">Beth Crane</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼

# Creating a Group Roster

# Creating a Group Roster

## Steps to Create Group Roster

1. Click the Tier 1 Form under the Record Search

The screenshot displays the 'Classes Offered' section of the Bonterra system. On the left, a dark sidebar contains a menu with the following items: Search Records, Incoming Referrals, Participant Profile, Household Profile, Caseworker Profile, and Classes Offered. The 'Classes Offered' item is highlighted with a blue box and a circled '1' next to it. The main content area is titled 'Classes Offered' and features a 'Classes Offered Search' section. This section includes a search bar with the placeholder text '-- Add Search Field --' and a 'Browse All' button. Below the search bar, a message states 'The following 3 Classes Offered records are available'. A table with four columns (Program, Class Name, Semester, Classroom) displays the following data:

Program	Class Name	Semester	Classroom
Advocacy	Advocacy for Juveniles	A	Room 214
Advocacy	Parent Advocacy	B	Room 216
Workforce Training	Training - Clerical	C	Room 212

# Creating a Group Roster

## Steps to Create Group Roster

1. Click the Tier 1 Form under the Record Search
2. Search for and select desired Group to open it in the edit view

Classes Offered

Classes Offered Search

-- Add Search Field -- [Browse All](#)

**Class Name (Classes Offered)** [Clear Field](#) ✕

The following 2 Classes Offered records matched your search criteria

Class Name ▾	Program ▾	Semester ▾	Classroom ▾
Advocacy for Juveniles	Advocacy	A	Room 214
Parent Advocacy	Advocacy	B	Room 216

# Creating a Group Roster

## Steps to Create Group Roster

1. Click the Tier 1 Form
2. Open the desired Group in the edit view
3. Click +Add next to the Add Participants field

Classes Offered

Enrollment Information ▾

\*Program

\*Class Name  \*Semester

\*Classroom

Links for Registration Grid ▾

Add attendees or registrants here

Hide Deactivated Links

Participant Profile					Link Info		
Participant Name ▾	Date of Birth ▾	Client Status ▾	Client Email ▾	Gender ▾	Active ▾	Delete	Date ▾
Sarah Greene	12/23/1987	Waiting List	sarah2532@yahoo.com	Female	<input checked="" type="checkbox"/>	<input type="button" value="🗑"/>	Added on 09/13/2023
Beth Crane	06/04/1974	Active	b.crane@gmail.com	Female	<input checked="" type="checkbox"/>	<input type="button" value="🗑"/>	Added on 09/13/2023

# Creating a Group Roster

## Steps to Create Group Roster

1. Click the Tier 1 Form
2. Open the desired Group in the edit view
3. Click +Add next to the Add Participants field
4. Search & Select desired Participant(s)

Classes Offered

Enrollment Information ▶

Links for Registration Grid ▼

Add attendees or registrants here

Hide Deactivated Links [+ Add](#)

Participant Profile Search [+ Create New](#) [Link All](#) [Clear History](#) ✕

-- Add Search Field -- [Browse All](#)

**Participant Name (Participant Profile)** [Clear Field](#) ✕

First  Middle  Last

The following 2 Participant Profile records matched your search criteria [More Columns...](#)

Participant Name ▼	Date Of Birth ▼	Client Status ▼	Client Email ▼
April Billingslea	04/15/1982	Active	aprilb@yahoo.com
Asher Billingslea	06/09/1984	Active	abilingslea@gmail.com

Hide Deactivated Links [+ Add](#)



# Creating a Group Roster

## Steps to Create Group Roster

1. Click the Tier 1 Form
2. Open the desired Group in the edit view
3. Click +Add next to the Add Participants field
4. Search & Select desired Participant(s)
5. Click X to close search pop – up
6. Click Save Record

The screenshot displays the 'Classes Offered' interface. At the top, there are sections for 'Enrollment Information' and 'Links for Registration Grid'. Below these is a search area for participants. A search pop-up is open, showing a search bar and a table of results. The table has columns for Participant Name, Date Of Birth, Client Status, and Client Email. Two participants are listed: April Billinglea and Asher Billinglea. A red 'X' button is visible in the top right of the search pop-up, corresponding to step 5. To the right of the main interface is a sidebar with 'Record Options' and 'Record Save Checklist'. The 'Save Record' button in the 'Record Options' section is highlighted with a red circle and the number 6, corresponding to step 6.

Participant Name	Date Of Birth	Client Status	Client Email
April Billinglea	04/15/1982	Active	aprilb@yahoo.com
Asher Billinglea	06/09/1984	Active	abillinglea@gmail.com

# Editing a Group Roster

# Editing a Group Roster

- Group Roster is flexible
- Add or Remove participants any time



# Editing a Group Roster

- Group Roster is flexible
- Add or Remove participants any time
  - Client moves or has schedule conflict

The screenshot displays a web application interface for editing a group roster. It is divided into two main sections: Enrollment Information and Links for Registration Grid.

**Enrollment Information**

- \*Program**: Advocacy (dropdown)
- \*Class Name**: Parent Advocacy (text input)
- \*Semester**: B (dropdown)
- \*Classroom**: Room 216 (dropdown)

**Links for Registration Grid**

**Add attendees or registrants here**

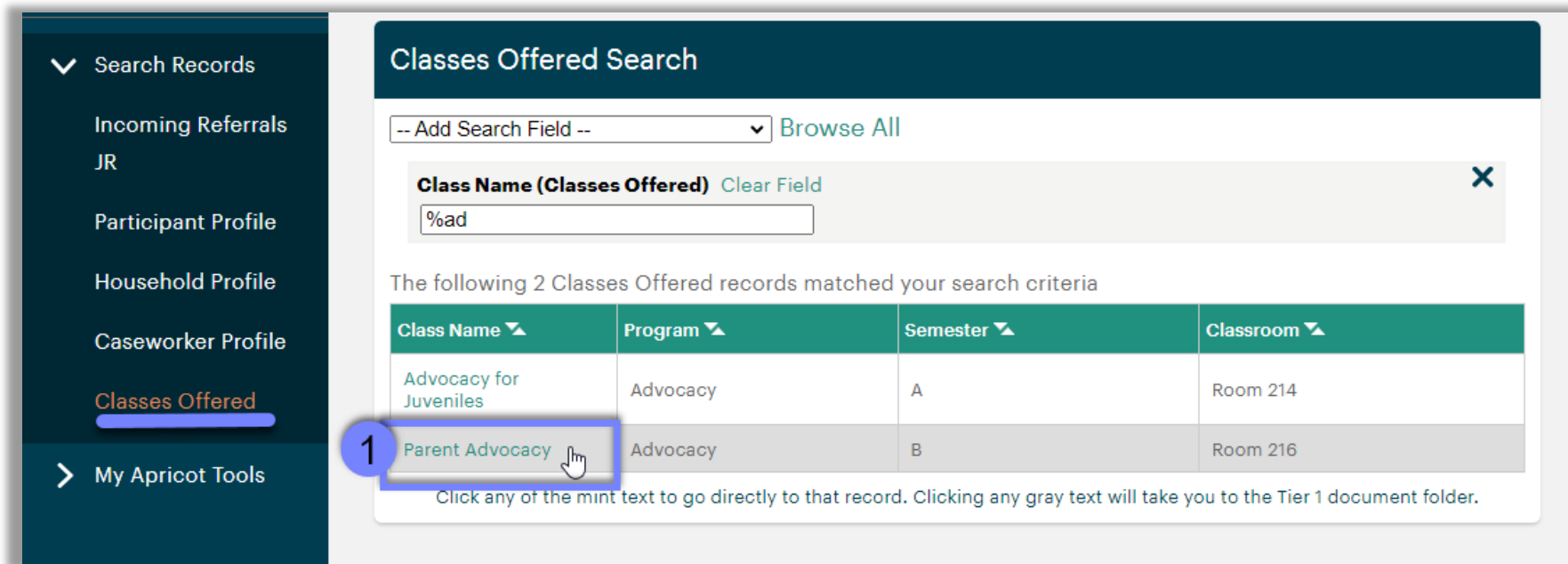
Hide Deactivated Links [+ Add](#)

Participant Profile					Link Info		
Participant Name	Date of Birth	Veteran Status	Client Status	Client Email	Active	Delete	Date
Sarah Greene	12/23/1987		Waiting List	sarah2532@yahoo.com	<input checked="" type="checkbox"/>		Added on 09/13/2023
Beth Crane	06/04/1974		Active	b.crane@gmail.com	<input checked="" type="checkbox"/>		Added on 09/13/2023
April Billingslea	04/15/1982		Active	aprilb@yahoo.com	<input checked="" type="checkbox"/>		Added on 09/13/2023

# Editing a Group Roster

## Steps to Edit Group Roster

1. Open the desired Group in the edit view



**Classes Offered Search**

-- Add Search Field -- [Browse All](#)

**Class Name (Classes Offered)** [Clear Field](#) ✕

%ad

The following 2 Classes Offered records matched your search criteria

Class Name ▾	Program ▾	Semester ▾	Classroom ▾
Advocacy for Juveniles	Advocacy	A	Room 214
Parent Advocacy	Advocacy	B	Room 216


Click any of the mint text to go directly to that record. Clicking any gray text will take you to the Tier 1 document folder.



# Editing a Group Roster

## Steps to Edit Group Roster

1. Open the desired Group in the edit view
2. Scroll to the section for adding registrants

### Enrollment Information ▾

**\*Program** 




**\*Class Name**   **\*Semester** 

**\*Classroom**

### Links for Registration Grid ▾

**Add attendees or registrants here** 2

Hide Deactivated Links + Add


Participant Profile					Link Info		
Participant Name ▾	Date of Birth ▾	Veteran Status ▾	Client Status ▾	Client Email ▾	Active ▾	Delete	Date ▾
Sarah Greene	12/23/1987		Waiting List	sarah2532@yahoo.com	<input checked="" type="checkbox"/>		Added on 09/13/2023
Beth Crane	06/04/1974		Active	b.crane@gmail.com	<input checked="" type="checkbox"/>		Added on 09/13/2023
April Billingslea	04/15/1982		Active	aprilb@yahoo.com	<input checked="" type="checkbox"/>		Added on 09/13/2023


# Editing a Group Roster


## Steps to Edit Group Roster

1. Open the desired Group in the edit view
2. Scroll to the section for adding registrants
3. Uncheck the box in the Active column to the right of the desired participant

### Enrollment Information ▾

**\*Program**   
Advocacy ▾

**\*Class Name**  Parent Advocacy




**\*Semester**  B ▾

**\*Classroom**  
Room 216 ▾

### Links for Registration Grid ▾

**Add attendees or registrants here**

Hide Deactivated Links [+ Add](#)

Participant Profile					Link Info		
Participant Name	Date of Birth	Veteran Status	Client Status	Client Email	Active	Delete	Date
Sarah Greene	12/23/1987		Waiting List	sarah2532@yahoo.com	<input checked="" type="checkbox"/>		Added on 09/13/2023
Beth Crane	06/04/1974		Active	b.crane@gmail.com	<input checked="" type="checkbox"/>		Added on 09/13/2023
April Billingslea	04/15/1982		Active	aprilb@yahoo.com	<input checked="" type="checkbox"/>		Added on 09/13/2023

# Editing a Group Roster

## Steps to Edit Group Roster

1. Open the desired Group in the edit view
2. Scroll to the section for adding registrants
3. Uncheck the box in the Active column to the right of the desired participant
4. Click Save Record

**Enrollment Information**

\*Program

\*Class Name  \*Semester

\*Classroom

**Links for Registration Grid**

Add attendees or registrants here  Hide Deactivated Links

Participant Profile					Link Info		
Participant Name	Date of Birth	Veteran Status	Client Status	Client Email	Active	Delete	Date
Beth Crane	06/04/1974		Active	b.crane@gmail.com	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>	Added on 09/13/2023
April Billingslea	04/15/1982		Active	aprilb@yahoo.com	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>	Added on 09/13/2023
Alonzo LaBatsille	03/04/1998		Active		<input checked="" type="checkbox"/>	<input type="button" value="Delete"/>	Added on 10/10/2017

**Record Options**

4

**Record Save Checklist**

Required Field Checks

Field Validation Checks

**Last Saved**

09/13/2023 2:25 PM CDT

Sabrina Gilbert

**Favorites**

My Classes Offered Records



# Editing a Group Roster

## Steps to Edit Group Roster

1. Open the desired Group in the edit view
2. Scroll to the section for adding registrants
3. Click the kebab icon next to the desired participant
4. Click Save Record

\*Note: Unenrolled members do NOT show on roster due to Hide Deactivated Links setting.

The screenshot displays the 'Enrollment Information' section with the following details:

- \*Program:** Advocacy
- \*Class Name:** Parent Advocacy
- \*Semester:** B
- \*Classroom:** Room 216

Below this is the 'Links for Registration Grid' section, which includes a toggle for 'Hide Deactivated Links' (checked) and an 'Add' button. The registration grid contains the following data:

Participant Profile					Link Info		
Participant Name	Date of Birth	Veteran Status	Client Status	Client Email	Active	Delete	Date
Beth Crane	06/04/1974		Active	b.crane@gmail.com	<input checked="" type="checkbox"/>		Added on 09/13/2023
April Billingslea	04/15/1982		Active	aprilb@yahoo.com	<input checked="" type="checkbox"/>		Added on 09/13/2023
Alonzo LaBatsille	03/04/1998		Active		<input checked="" type="checkbox"/>		Added on 10/10/2017

On the right side of the interface, there are several utility panels:

- Record Options:** Save Record, Print Mode, Archive Record, View History, New Classes Offered, Record Attendance, View Folder, Go To Search.
- Record Save Checklist:** Required Field Checks (checked), Field Validation Checks (checked).
- Last Saved:** 09/13/2023 2:25 PM CDT, Sabrina Gilbert.
- Favorites:** My Classes Offered Records, Set Favorites.

# Tracking Attendance

# Tracking Attendance

- Accessed via Document folder

The screenshot displays a software interface for tracking attendance. At the top, there is a navigation bar with a back arrow, the title "Parent Advocacy", and buttons for "Edit", "Create", and "Print". Below this is a tabbed interface with "DOCUMENT FOLDER" selected. The main content area shows "All Documents" and a "No Associated Forms" message. A dropdown menu is open, showing options: "Create Referral", "Record Audit", and "Record Attendance Here".

1 DOCUMENT FOLDER OVERVIEW LINKS ENROLLMENTS APPOINTMENTS

All Documents Expand Multiline

**No Associated Forms**  
Either no forms exist or you don't have access to view them.  
Please contact your administrator.

2

3

Record Attendance Here

# Tracking Attendance

- Accessed via Document folder
- Week view by default
- Adjust date to track previous weeks
- Parameters **do not** skip dates.
  - Be intentional to enter attendance according to group schedule

Record Attendance Here for Parent Advocacy

Parent Advocacy  
Quick View Information ▶

Record Attendance Here ▼

Record Attendance  
09/04/2023 5 Update

Participant Profile 4 Records	09/04/2023	09/05/2023	09/06/2023	09/07/2023	09/08/2023	
	Attendance --Please Select-- ▼	Attendance --Please Select-- ▼	Attendance --Please Select-- ▼	Attendance --Please Select-- ▼	Attendance --Please Select-- ▼	Update All
<a href="#">Alonzo LaBatsille</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	Attendance --Please Select-- ▼
<a href="#">April Billingslea</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	Attendance --Please Select-- ▼
<a href="#">Beth Crane</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	Attendance --Please Select-- ▼
<a href="#">Sarah Greene</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	Attendance --Please Select-- ▼

# Tracking Attendance

- Accessed via Document folder
- Week view by default
- Adjust date to track previous weeks
- Parameters **do not** skip dates.
  - Be intentional to enter attendance according to group schedule
- Update All saves time
- Data stores in Participant Document Folder

Record Attendance Here for Parent Advocacy

Parent Advocacy  
Quick View Information ▶

Record Attendance Here ▼

Record Attendance  
09/04/2023 📅 5 Update

Participant Profile 4 Records	09/04/2023	09/05/2023	09/06/2023	09/07/2023	09/08/2023	
	Attendance --Please Select-- ▼	Attendance --Please Select-- ▼	Attendance --Please Select-- ▼	Attendance --Please Select-- ▼	Attendance --Please Select-- ▼	Update All
<a href="#">Alonzo LaBatsille</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	Attendance --Please Select-- ▼
<a href="#">April Billingslea</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	Attendance --Please Select-- ▼
<a href="#">Beth Crane</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	Attendance --Please Select-- ▼
<a href="#">Sarah Greene</a>	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	--Please Select-- ▼	Attendance --Please Select-- ▼

# Tracking Attendance

## Steps:

1. Open the kebab menu in the Document Folder
2. Click Record Attendance

The screenshot displays the 'Parent Advocacy' interface. At the top, there are navigation tabs: 'DOCUMENT FOLDER' (highlighted), 'OVERVIEW', 'LINKS', 'ENROLLMENTS', and 'APPOINTMENTS'. To the right of these tabs are three buttons: 'Edit' with a pencil icon, 'Create' with a plus icon, and 'Print' with a printer icon. A yellow circle with the number '1' highlights the kebab menu icon (three vertical dots) to the right of the 'Print' button. A dropdown menu is open, showing three options: 'Create Referral' with a double-headed arrow icon, 'Record Audit' with a clock icon, and 'Record Attendance Here' with a calendar icon. A yellow circle with the number '2' highlights the 'Record Attendance Here' option, which is also highlighted with a blue border and a mouse cursor. Below the menu, the main content area shows 'All Documents' with an 'Expand Multiline' checkbox and a search icon. A large document icon with an exclamation mark is centered, with the text 'No Associated Forms' and a message: 'Either no forms exist or you don't have access to view them. Please contact your administrator.'

# Tracking Attendance

## Steps:

1. Open the kebab menu in the Document Folder
2. Click Record Attendance
3. Set the desired date parameters
4. Enter attendance
5. Click Save Record
6. Repeat for additional weeks

Record Attendance Here ▾

Record Attendance

09/04/2023 📅 5 Update

Participant Profile 4 Records	09/04/2023	09/05/2023	09/06/2023	09/07/2023	09/08/2023	
	Attendance --Please Select-- ▾	Attendance Present ▾	Attendance --Please Select-- ▾	Attendance ▾	Attendance --Please Select-- ▾	Update All
<a href="#">Alonzo LaBatsille</a>	--Please Select-- ▾	Present ▾	--Please Select-- ▾	Late ▾	--Please Select-- ▾	Attendance --Please Select-- ▾
<a href="#">April Billingslea</a>	--Please Select-- ▾	Present ▾	--Please Select-- ▾	Present ▾	--Please Select-- ▾	Attendance --Please Select-- ▾
<a href="#">Beth Crane</a>	--Please Select-- ▾	Present ▾	--Please Select-- ▾	Absent ▾	--Please Select-- ▾	Attendance --Please Select-- ▾
<a href="#">Sarah Greene</a>	--Please Select-- ▾	Present ▾	--Please Select-- ▾	Present ▾	--Please Select-- ▾	Attendance --Please Select-- ▾

# 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](mailto: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.