

# Starting Strong With Apricot

## Apricot Fundamentals

We will begin shortly!



# Meet Your Trainer

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# Learning Objective

This training will cover:

- The structure of Apricot
- Users and Permissions
- Basic setup of forms & reports

By the end of this session, the goal is for you to understand the structure of Apricot, as well as the fundamental areas of Apricot that are key to using the system effectively.

# Agenda

Apricot Structure

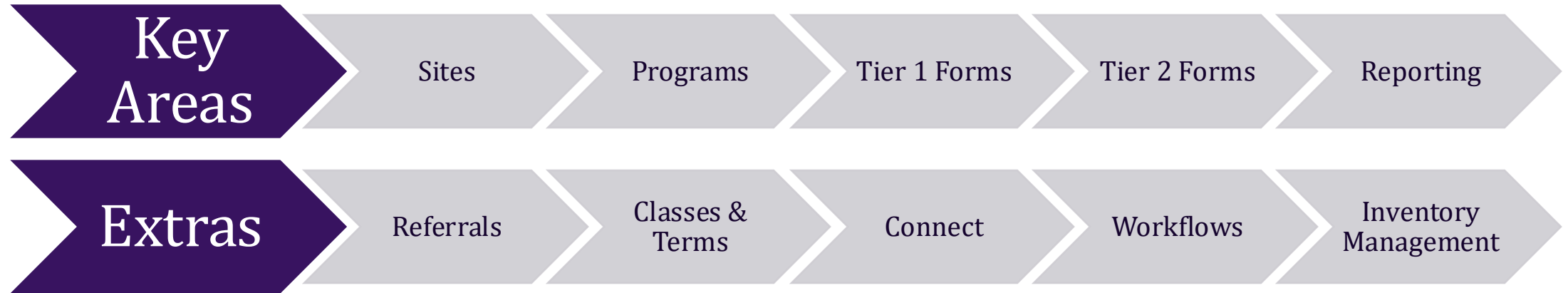
Sites & Programs

Users & Permissions

Forms & Reports

# Apricot Structure

# Features of Apricot



# The Filing Cabinet

Think of Apricot like an old school filing cabinet

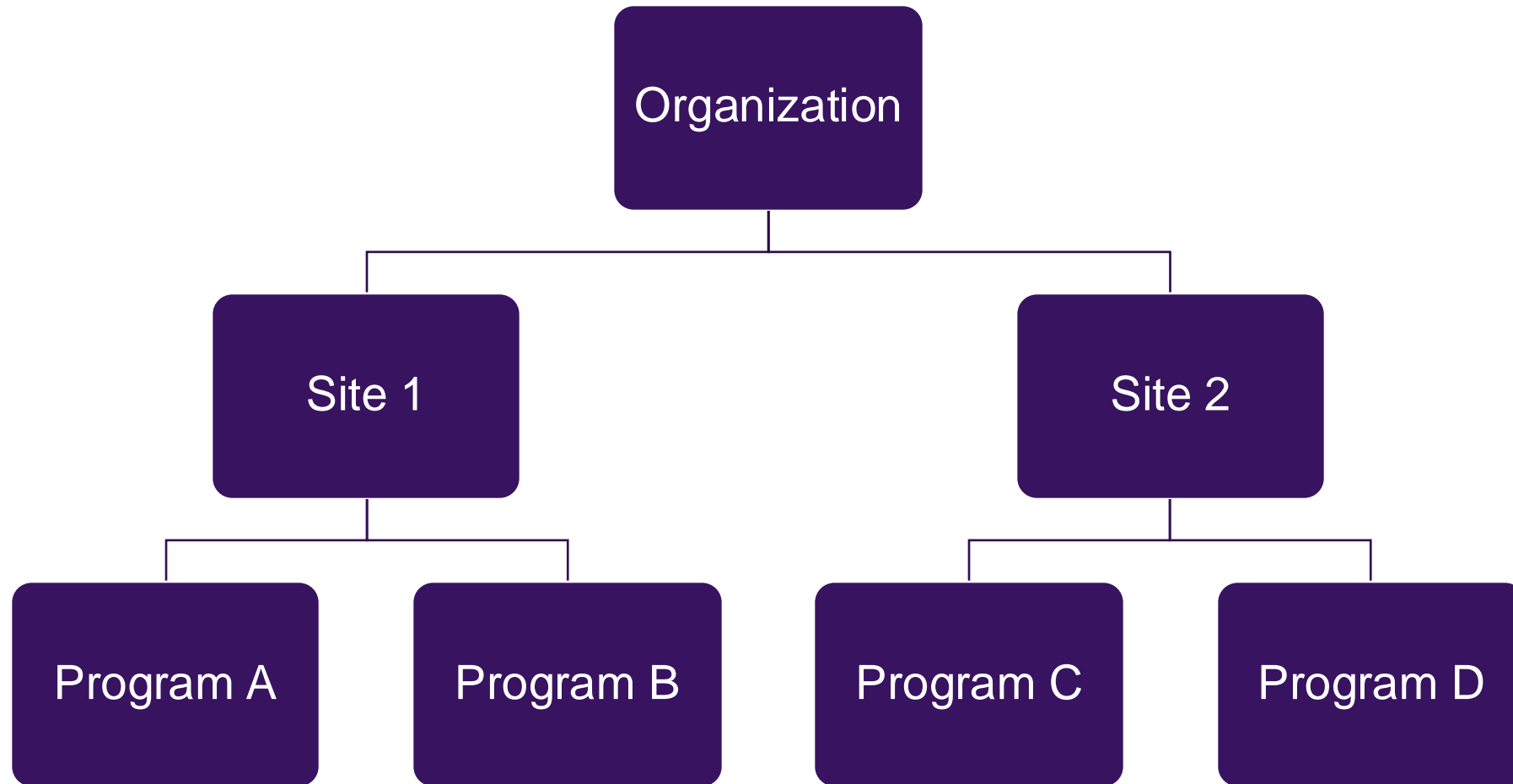
1. Filing cabinet = Apricot site
2. Drawer = Program within that site
3. File = Document Folder
  - Face sheet = Tier 1 form
  - Service notes = Tier 2 forms



# Sites & Programs



# Site and Program Structure



# Site & Program Structure

## Programs:

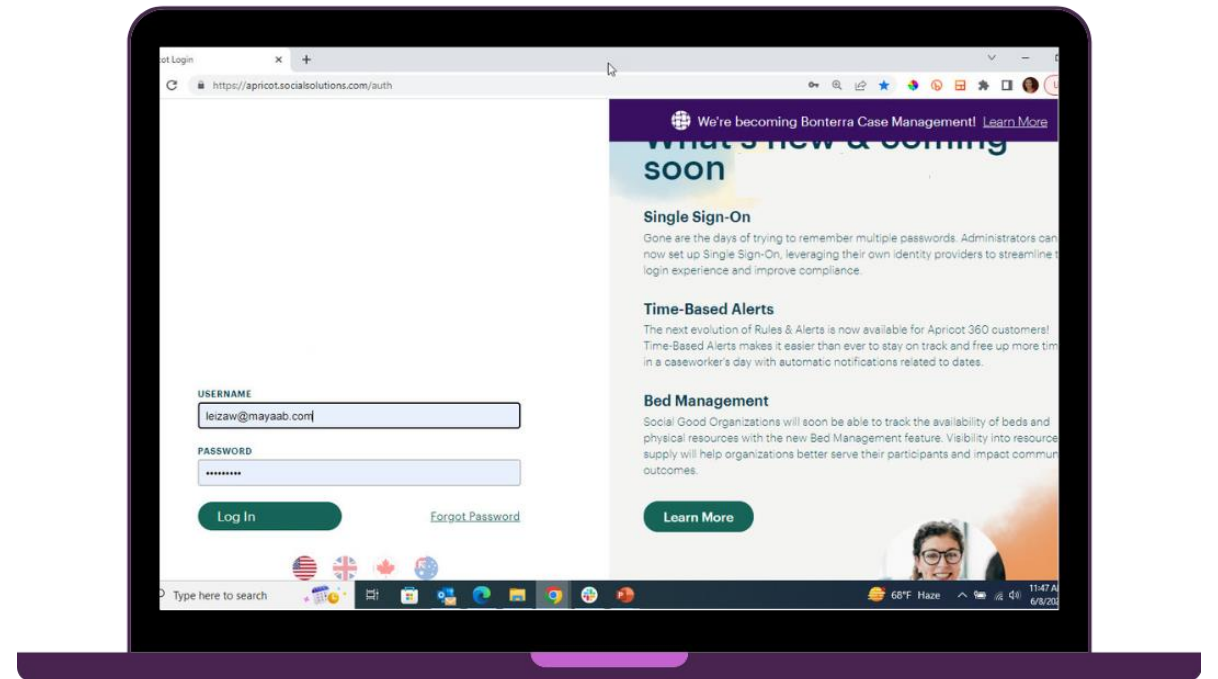
- Divide data by organizational programs
  - Forms
  - Clients
  - Reports

The image displays a side-by-side comparison of the Apricot CORE user interface for two different programs. The left panel shows the 'Program College Prep' site, and the right panel shows the 'Program Empowering Families' site. Both panels are for the user 'Aaron Anderson' and are in the 'DOCUMENT FOLDER' view. The left panel's sidebar menu includes 'My Apricot', 'Administrator', 'Search Records', 'Participant Profile', and 'My Apricot Tools'. The right panel's sidebar menu includes 'My Apricot', 'Administrator', 'Search Records', 'Participant Profile', 'Household Profile', and 'My Apricot Tools'. The main content area of both panels shows 'All Documents' with an 'Expand Multiline' checkbox and a list of document types: 'Program Enrollment and Exit (0 records)', 'Individualized Service (0 records)', 'Counseling Appointment (0 records)', and 'Positive Parenting Assessment (0 records)'. The 'vs' label between the two panels indicates a comparison of the site structure and available data.

# Users & Permissions

# What Are User Accounts

- Allows individuals access to the software
- Requires a username and password
- Must be assigned to a Role & Program



# What are Roles?

- Indicate what features should be available
  - Forms
  - Reports
  - Bulletins
  - Referrals
  - Shared Files
- Indicate what action users should be able to take with those features
- Can have multiple roles
- Single Role can be used across different job titles with similar duties.

**Role Details**

NAME  
Data Entry Staff

DESCRIPTION  
Description for a role

**Permissions**

Undo Redo Search by Name...

FORMS REPORTS AGGREGATE REPORTS BULLETINS REFERRALS SHARED FILES

PROG. SPECIFIC	NAME	RECORDS								FORMS
		VIEW	SEARCH	CREATE	EDIT	ARCHIVE	IGNORE PROGRAM ASSIGNMENT	CASELOAD	VIEW SECURE FIELDS	EDIT
<input checked="" type="checkbox"/>	Class Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Donor Profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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# Forms & Reports

# Apricot Forms

- Tier 1 and Tier 2 forms used to track data entry within Apricot
- Tier 1 forms are generally used for collecting demographic information
  - Intake Forms
  - Participant Profile
- Tier 2 forms are generally used for tracking services data
  - Counselling Notes
  - Workshop Attendance


Services / Case Notes


**Michael L Jones**  
Quick View Information ▶

Main ▼


**\* Related Program Enrollment**

Links to be Added Upon Save  
- Housing & Food Pantry

**Program**   
Housing & Food Pantry ▼

**\*Date of Service**  
04/29/2024 

**\*Service Provided**  
Meal Provided ▼

**\*Total Time**   
30

**Did you discuss goals?**

Yes  
 No

**Service Notes**  
Intro discussion around food security workshops and meal provided. Will dive into goals if client agrees to participate further.

# Form Builder

- Forms are built in Apricot to replicate the paper forms or spreadsheets that your agency may have previously utilized
- Built on the administrative side of Apricot
- Structured to capture data in a way that allows for optimal reporting

The screenshot displays the Apricot 360 Form Builder interface. The top navigation bar includes the Apricot 360 logo, a menu icon, and the user's name 'Megan Dodds' with a profile picture. The main content area is titled 'Participant' and shows a 'Participant Details' form with the following fields:

- Legal Name:** First, Middle, Last
- Legal Name differs from Preferred Name?** (Yes/No radio buttons)
- Preferred Name/Nickname:** Text input
- Date of Birth:** MM/DD/YYYY with a calendar icon
- Nickname or Alias?** (Yes/No radio buttons)
- Pronouns:** --Please Select-- dropdown
- Email:** customer\_care@apricot.
- Mobile Phone:** [ ] [ ] [ ] ext. [ ]
- Monthly Income:** \$1,000.00
- Social Security Number:** [ ] [ ] [ ]
- Home Phone:** [ ] [ ] [ ] ext. [ ]
- Drivers License Number:** [ ] [ ] [ ] [ ] [ ] [ ]
- Mailing Address:** Clear button, Address (Line 1, Line 2), City, State (dropdown), County, Zip

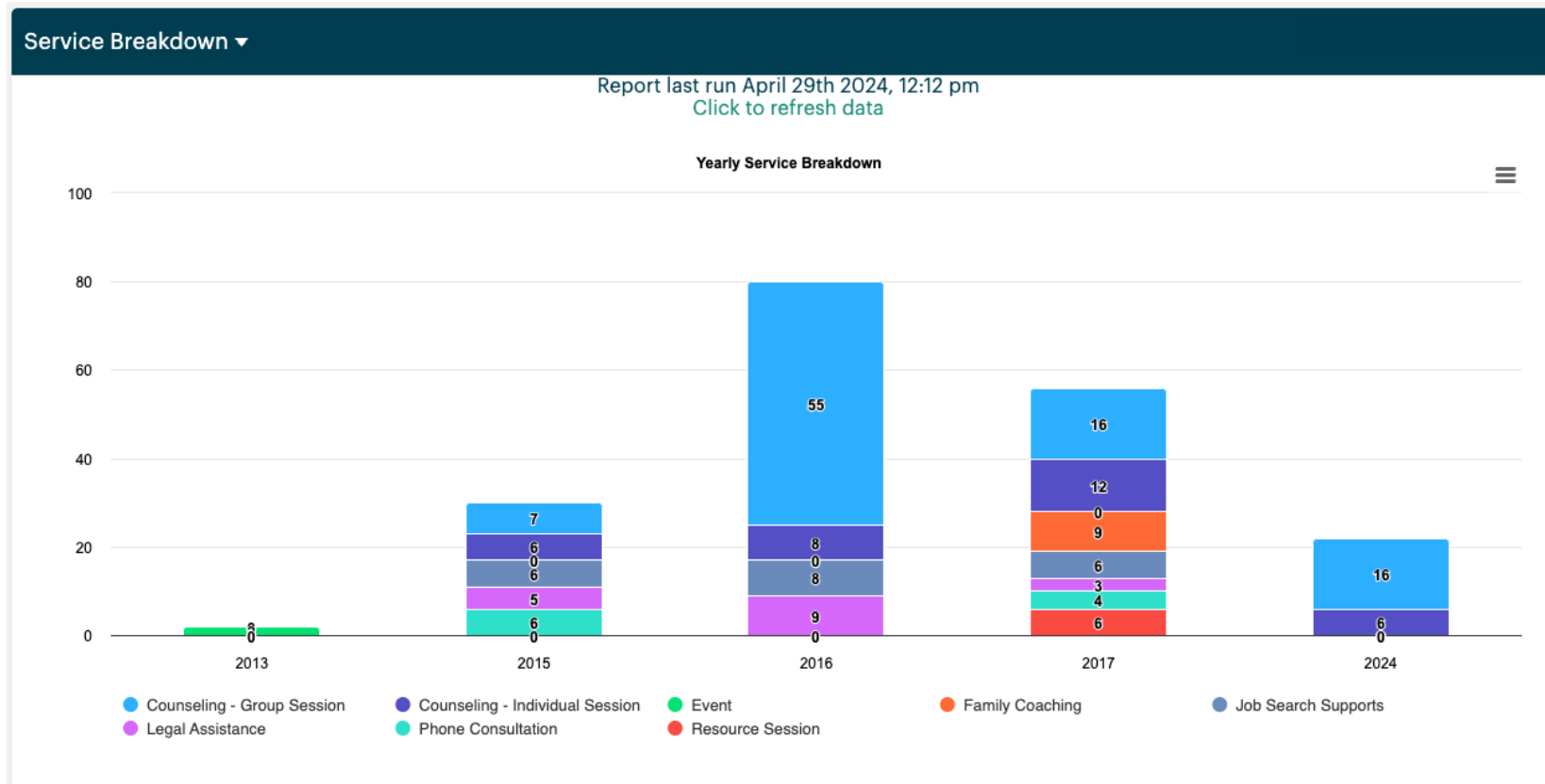
The left sidebar menu includes: Dashboard, Inventory, **Form Designer** (highlighted with a red box), Report Center, Record Manager, Access Control, Workflow Station, External Access, SSG Admin, Connect, Customer Care, and Help Center.

The right sidebar contains a 'COLLAPSE ALL' button, a 'Field Choices' dropdown menu with options like All, Demographic, Option, Text, Numeric, Calculation, Date and Time, Upload, Hyperlink, Linking, Special, and Smart Fields; an 'Add Section' button; a 'Registration' button; a 'Requirements' section showing 'All checks passed'; and a 'Form Actions' section with buttons for Save Form, Publish Form, Templatize, Previous Version, Deactivate Form, Form Permissions, Return to Form List, and Show/Hide Inactive Fields.



# Apricot Reports

- Reports are built in Apricot to provide you with key insights and summaries of the data collected within your forms
- Can create cyclical reports for funders or data quality reports for administrators
- Reports may show where data is missing, participant change over time, numbers of clients served, demographic breakdowns and more!



# Report Builder

- Reports are built from the data fields collected in your forms
- Built on the administrative side of Apricot
- Present rows of data or visual representations

The screenshot displays the 'Report Builder' interface. At the top, there is a 'Missing Data' section with a gear icon. Below it is a 'Global Values' section with a dropdown arrow and an 'Add' button. The main area is titled 'New Section' and contains several expandable sections: 'Forms' (with sub-items 'Participant (Always)' and 'Services / Case Notes (Always)'), 'Filters' (with sub-items 'Total Time Is Empty' and 'Service Provided Is Empty'), 'Filter Logic' (with a dropdown set to '1 OR 2'), and 'Limit Sections'. A central message states: 'Report last run May 1st 2024, 11:39 am. Click to refresh data. Auto run has been turned off for this section. Click here to turn it back on.' Below this is a table with columns: 'Record ID', 'Record ID', 'Service Provided', and 'Total Time', each with a gear icon. On the right side, there is a 'COLLAPSE ALL' button, a 'Field Choices' panel with a list of categories like 'Special Columns', 'Sites and Programs', 'Attendance Tracker', 'Enrollments', 'Household', 'Users', and 'Participant', and a 'Requirements' panel showing 'All checks passed' with a green checkmark. At the bottom right, there is a 'Report Actions' panel with buttons for 'Add New Section', 'Save Report', 'Copy Report', 'Publish Report', 'Revert Report', and 'Delete Report'.

*View the "Connection Between Forms & Reporting" webinar for best practices to optimize reports.*

# 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)

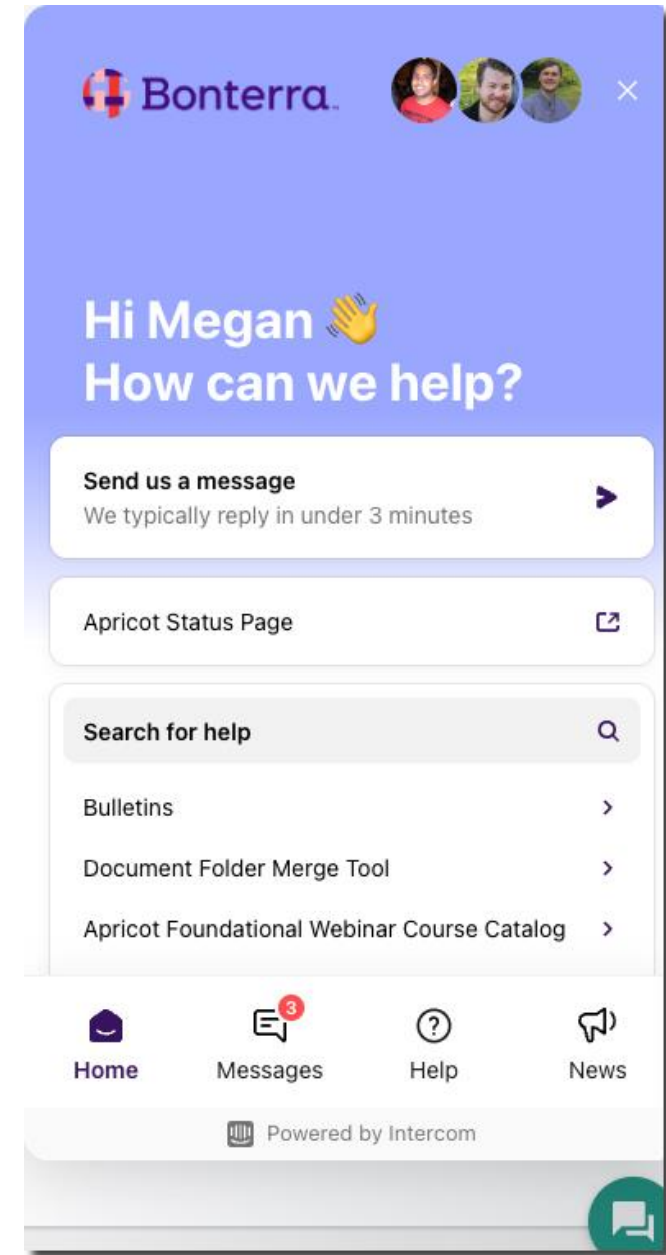


Build confidence & knowledge in  
our software!

# 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.