

# Apricot Becoming a Strong User Webinar

# Meet Your Trainer

First Name Last Name

Training & Development Associate

# Learning Objective

Introduce standard users to the best practices for data entry and obtaining support for using Apricot so that users can effectively leverage the software as a tool to make their job easier.

# Agenda

Data Integrity

Navigating the Help Center

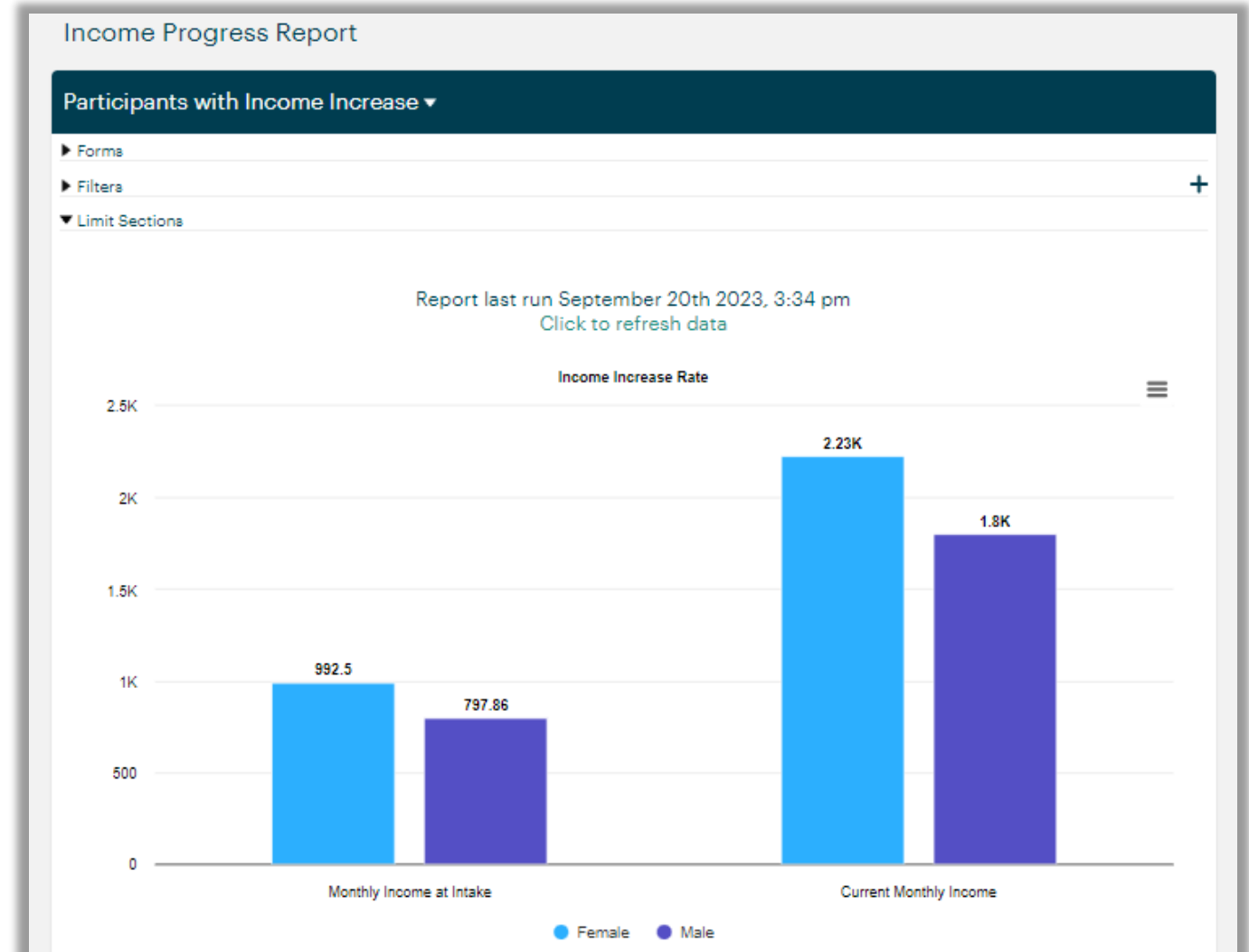
Contacting Your Administrator

Bonterra Academy

# Data Integrity


# Data Integrity

- Purpose of Apricot
  - Measure & Demonstrate Impact
  - Data Integrity is a determining factor in achieving this purpose



# Data Integrity

- Inaccurate data in Forms shows in Reports
- Reports become inconclusive





New Section ▾ 

► Forms

▼ Filters +

▼ Limit Sections

Report last run September 20th 2023, 3:46 pm  
[Click to refresh data](#)  
Results limited to the first 10 Rows.

First 	Last 	Monthly Income at Intake 	Current Monthly Income 
Alicia	Henry		2200.00
Alonzo	LaBatsille	1200.00	
Alonzo	LaBarca	0.00	2200.00
Alvy			
Andrew			
Apple			

## Participant Profile

### Profile Details ▾

#### \*Participant Name

Alicia  Middle  Henry

#### \*Date of Birth

08/19/1965

#### Contact Type

--Please Select-- ▾

#### Client Status

- Active  
 Inactive  
 Other

#### Intake Date

04/04/2017

#### Monthly Income (at Intake)

#### How did you hear about us?

- Internet  
 Newspaper  
 Radio  
 Referral from Partner

# Data Integrity

## Four Pillars

- Accuracy
- Uniformity
- Completeness
- Timeliness





# Data Integrity

## Accuracy

- Is data entered in the system correctly?
  - Correct Format?
  - Most Up to date?

### Track Services

Alicia Henry  
[Quick View Information](#)

#### Service Information

This form should be completed when a client receives any individualized service.

**\*Service Date**  
09/05/2023

**\*Service Type**  
Job Search Supports

**\*Funding Source**  
ABC

**\*Service Time**  
1 [Track in Minutes](#)


# Data Integrity

## Uniformity


- Built into most fields
- “Other” option is the exception


Participant Profile

Profile Details ▾

**\*Participant Name** 

Alicia Middle Henry

**\*Date of Birth** 

08/19/1965 

**Client Status**

Active

Inactive


Other

Wait List

**Client Phone Number**

ext.

**Intake Date**

04/04/2017 

**Are you a Veteran**

Yes

No

**How did you hear about us?**

Internet

Newspaper

Radio

Other

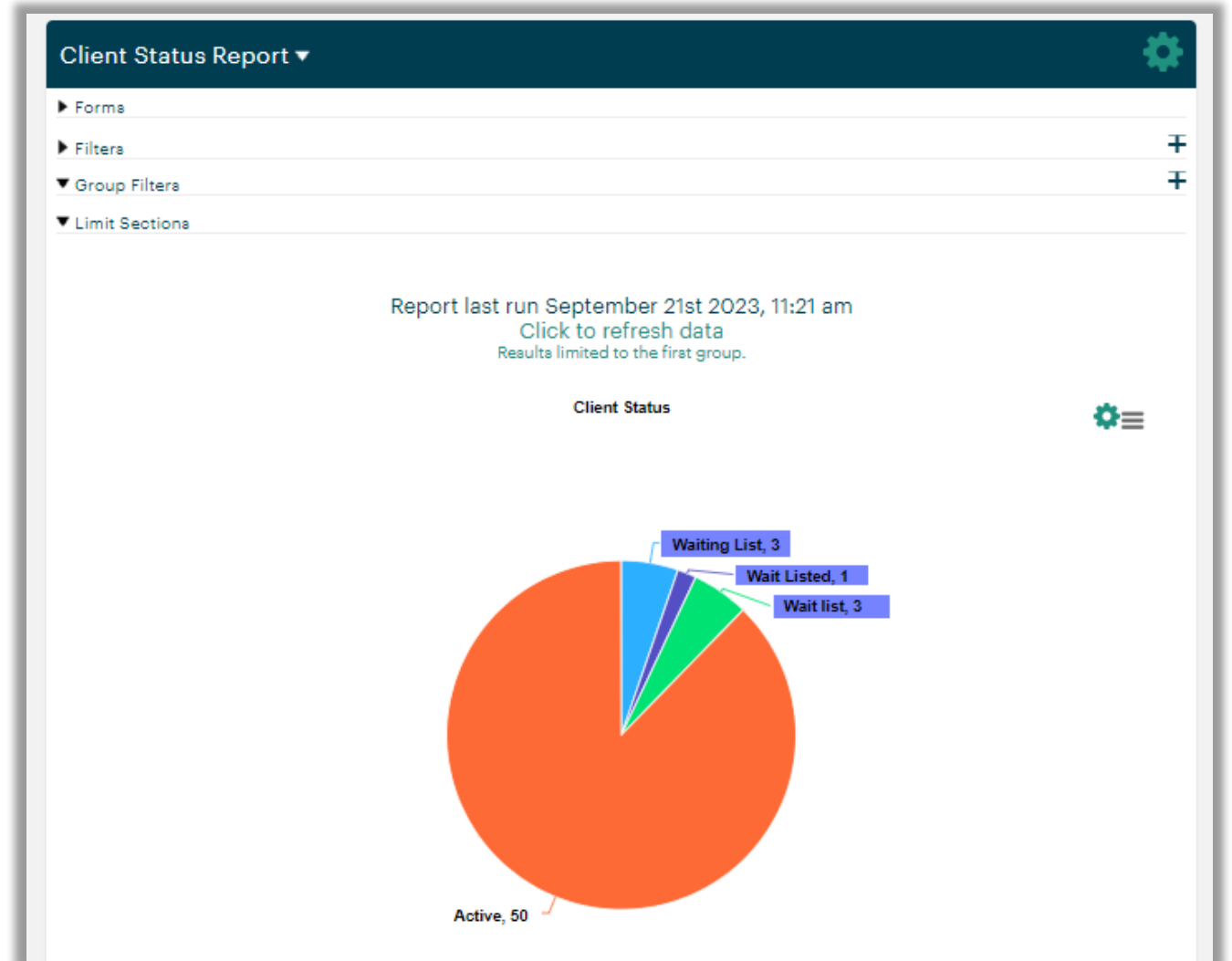
**Client Email**

customer\_care@apricot.inf

# Data Integrity

## Uniformity

- Variations Impact Reports
- Ask Administrator



# Data Integrity

## Completeness

- Is the data there?

### Participant Profile


#### Profile Details ▾

<b>*Participant Name</b>	<input type="text" value="Alicia"/> <input type="text" value="Middle"/> <input type="text" value="Henry"/>	<b>Intake Date</b>	<input type="text" value="04/04/2017"/>
<b>*Date of Birth</b>	<input type="text" value="08/19/1965"/>	<b>Monthly Income (at Intake)</b>	<input type="text"/>
<b>Contact Type</b>	<input type="text" value="--Please Select--"/> ▾	<b>How did you hear about us?</b>	
<b>Client Status</b>	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Other	<input type="checkbox"/> Internet <input type="checkbox"/> Newspaper <input type="checkbox"/> Radio <input type="checkbox"/> Referral from Partner	


# Data Integrity

## Completeness

- Is the data there?
- Unanswered fields create blank reports
- Enter data in all fields





New Section ▾ 

► Forms

▼ Filters 

▼ Limit Sections

Report last run September 20th 2023, 3:46 pm  
Click to refresh data  
Results limited to the first 10 Rows.

First 	Last 	Monthly Income at Intake 	Current Monthly Income 
Alicia	Henry		2200.00
Alonzo	LaBatsille	1200.00	
Alonzo	LaBarca	0.00	2200.00
Alvy	Singer	4000.00	2200.00
Andrew	Jones	1500.00	
Apple	Moore	985.00	1200.00


# Data Integrity

## Timeliness


- In time for reporting
- Entered close to real time


Participant Profile

Profile Details ▾

**\*Participant Name** 

First  Middle  Last

**\*Date of Birth** 

MM/DD/YYYY 

**Client Status**

Active


Inactive

Other

**Client Phone Number**

ext.

**Intake Date**

09/21/2023 

September ▾ 2023 ▾ today

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Other

**Client Email**

customer\_care@apricot.inf

# Navigating the Help Center

# Navigating the Help Center

- Accessed via Left Navigation Bar
- Functions like Google Search
- Accessible to all users

The screenshot shows the Bonterra Help Center interface. On the left is a dark teal navigation bar with the following items: Search Records, My Apricot Tools (expanded), My Reports, My Bulletins, My Shared Files, Schedule, Classes & Terms, My Referrals, Customer Care, and Help Center. The 'Help Center' item is highlighted with a green box and a green arrow pointing to it from a callout box that says 'Opens New Tab'. The main content area has a teal header with 'Welcome to the Training instance!' and a 'Training Site' dropdown. Below that is a white box with the text: 'This is a training site. You may open your organization's instance of the software to meet the needs of your program(s)'. A purple header with 'Need Help?' is followed by a white box with 'Welcome to our Case Management System!' and the text: 'If you have questions or need assistance please take the following steps'. Below this is a link 'Click here to open a support form by Clicking Here' and the text: 'If the FAQ document does NOT address your needs continue to step 2.' followed by 'Step 2' and 'Email us at [datasupport@gmail.com](mailto:datasupport@gmail.com)'.



# Navigating the Help Center

## Steps to Navigate the Help Center

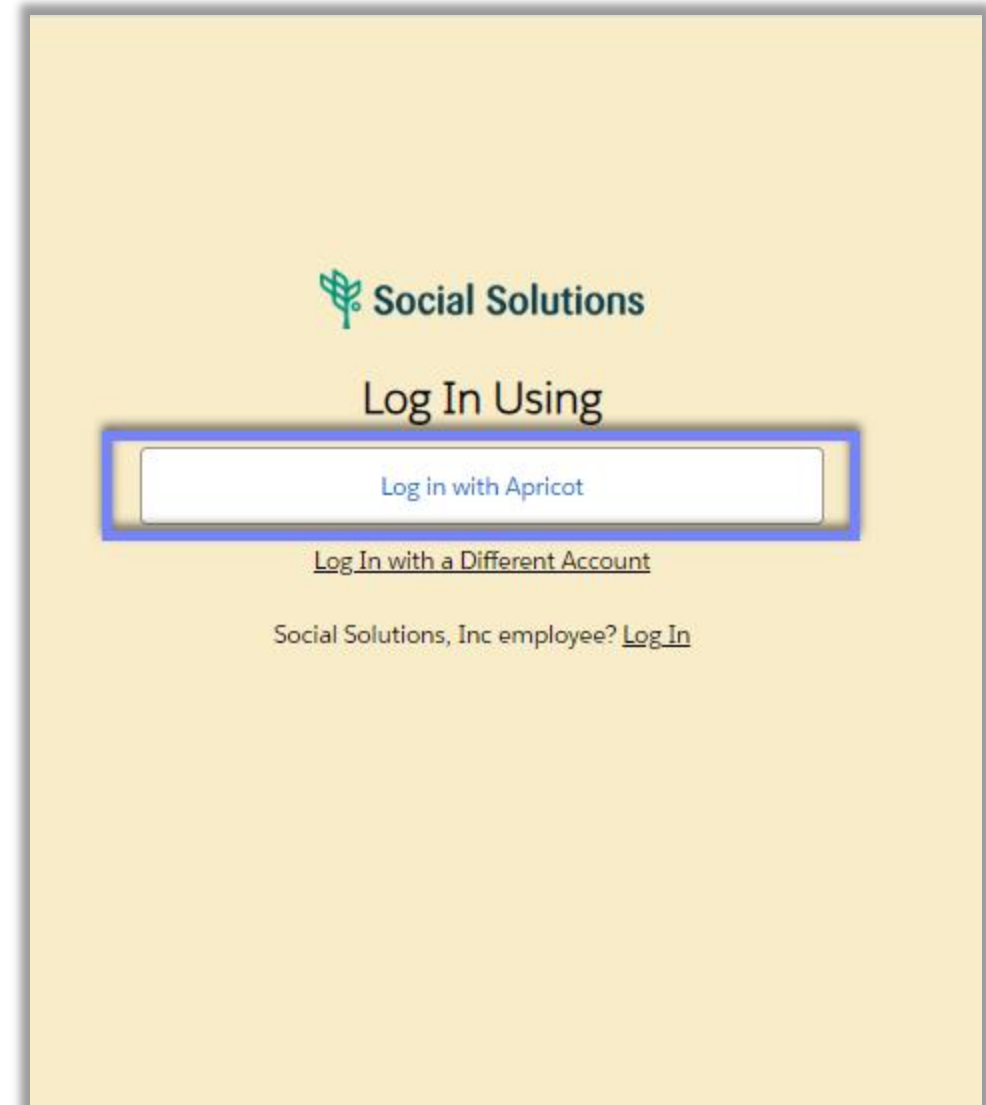
1. Click the Help Center option on the left Navigation Bar

The screenshot displays the Bonterra user interface. On the left is a dark teal navigation bar with the following items: Search Records, My Apricot Tools (expanded), My Reports, My Bulletins, My Shared Files, Schedule, Classes & Terms, My Referrals, Customer Care, and Help Center. The Help Center item is highlighted with a blue box and a red circle containing the number 1. The main content area on the right has a light gray header with the text "Welcome to the Training instance!". Below this is a dark teal bar labeled "Training Site" with a dropdown arrow. The content below this bar reads: "This is a training site. You may open your organization's instance of the software to meet the needs of your program(s)." Below that is a purple bar labeled "Need Help?" with a dropdown arrow. The content below this bar reads: "Welcome to our Case Management System!" followed by the italicized text "If you have questions or need assistance please take the following steps". It then lists "Step 1" as "Review the FAQ form by [Clicking Here](#)" and "If the FAQ document does NOT address your needs continue to step 2." "Step 2" is "Email us at [datasupport@gmail.com](mailto:datasupport@gmail.com)".

# Navigating the Help Center

## Steps to Navigate the Help Center

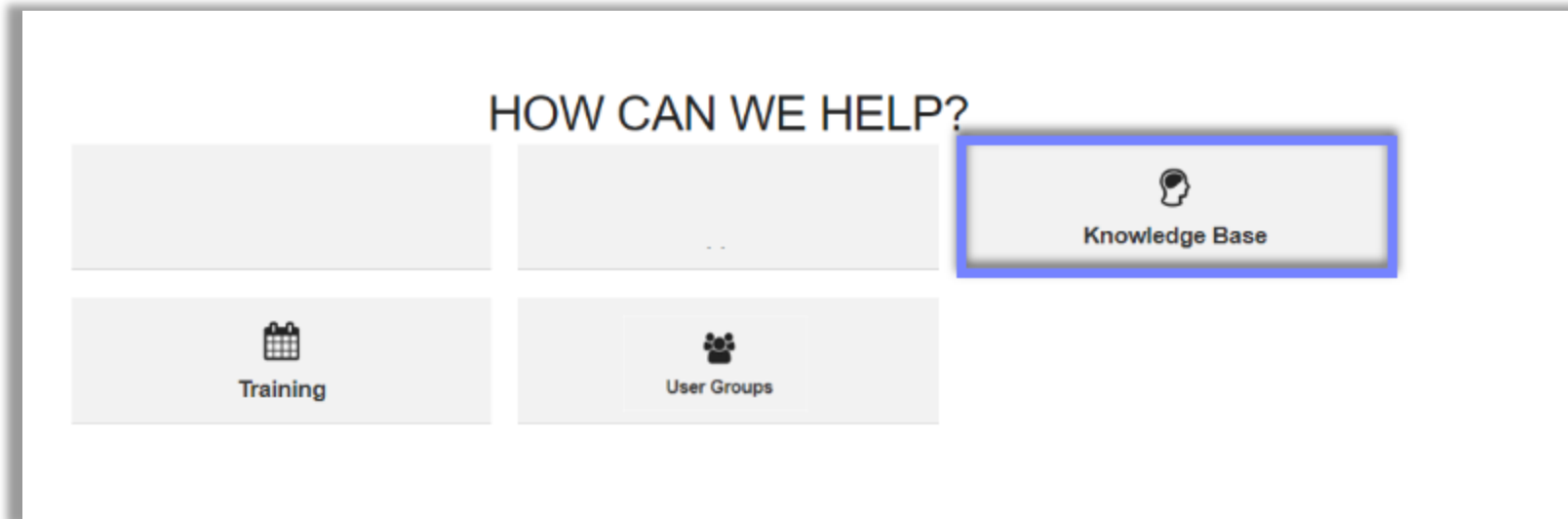
1. Click the Help Center option on the left Navigation Bar
  - a) Click Log in Using Apricot



# Navigating the Help Center

## Steps to Navigate the Help Center

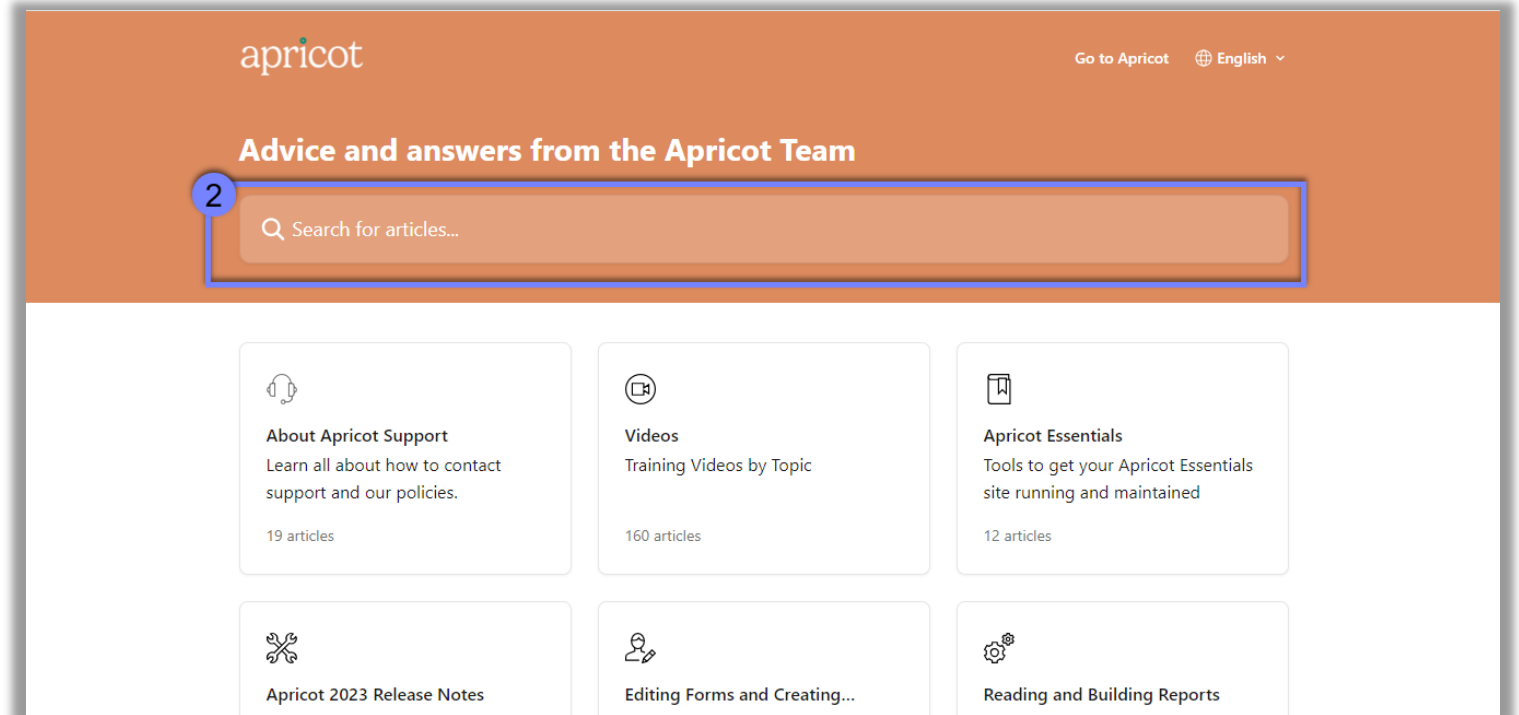
1. Click the Help Center option on the left Navigation Bar
  - a) Click Log in Using Apricot
  - b) Click Knowledge Base



# Navigating the Help Center

## Steps to Navigate the Help Center

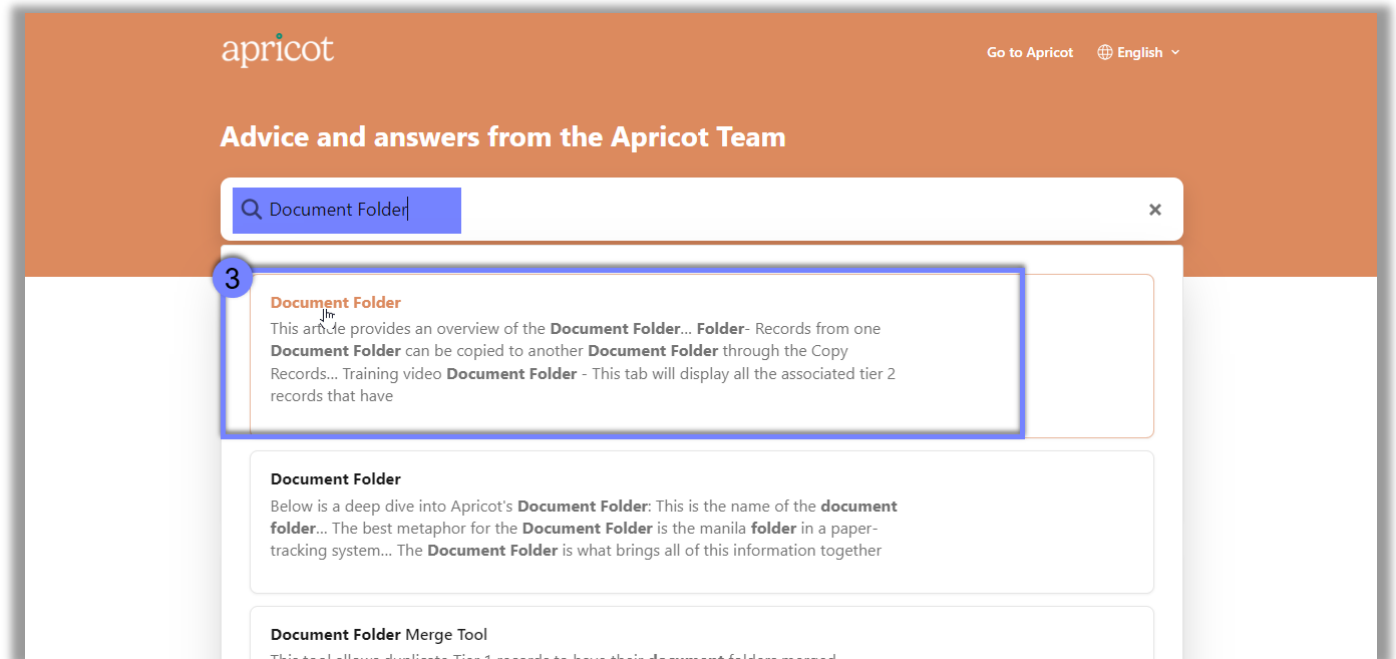
1. Click the Help Center option on the left Navigation Bar
2. Enter the feature name in the Search Terms



# Navigating the Help Center

## Steps to Navigate the Help Center

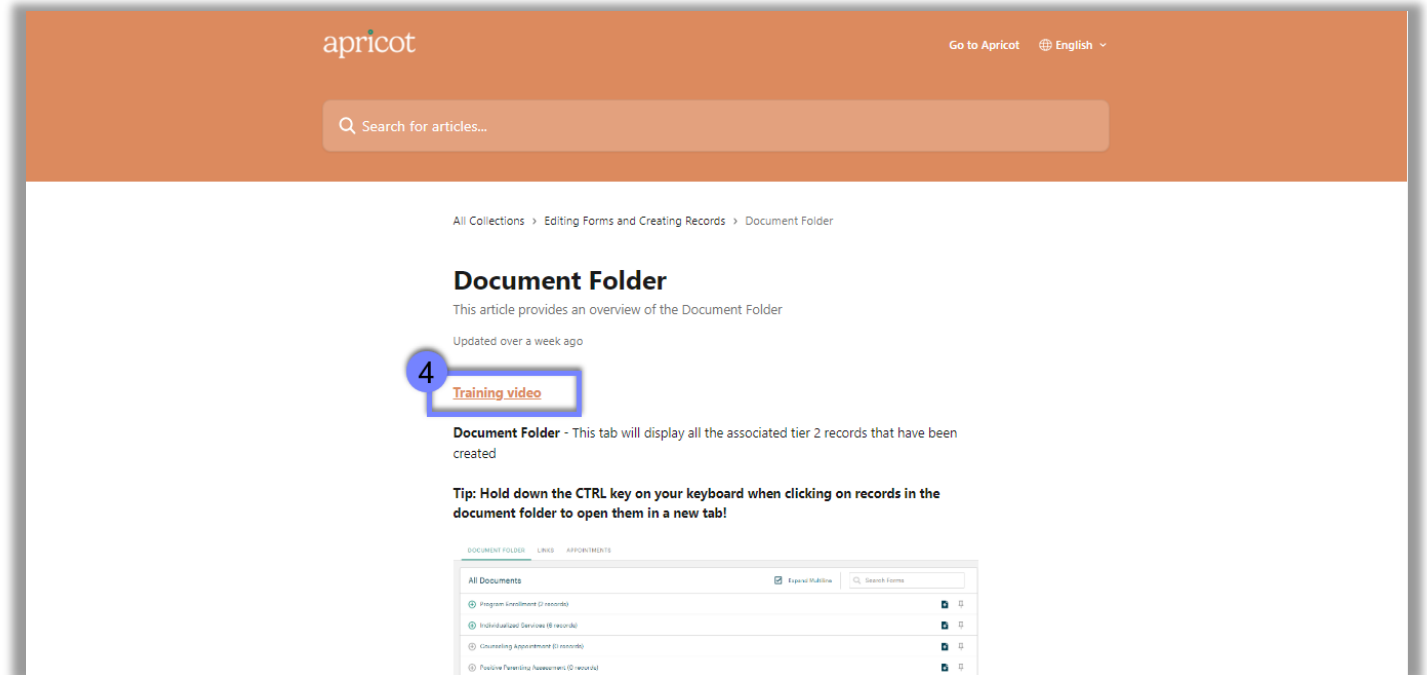
1. Click the Help Center option on the left Navigation Bar
2. Enter the feature name in the Search Terms
3. Select the desired article from Search Results



# Navigating the Help Center

## Steps to Navigate the Help Center

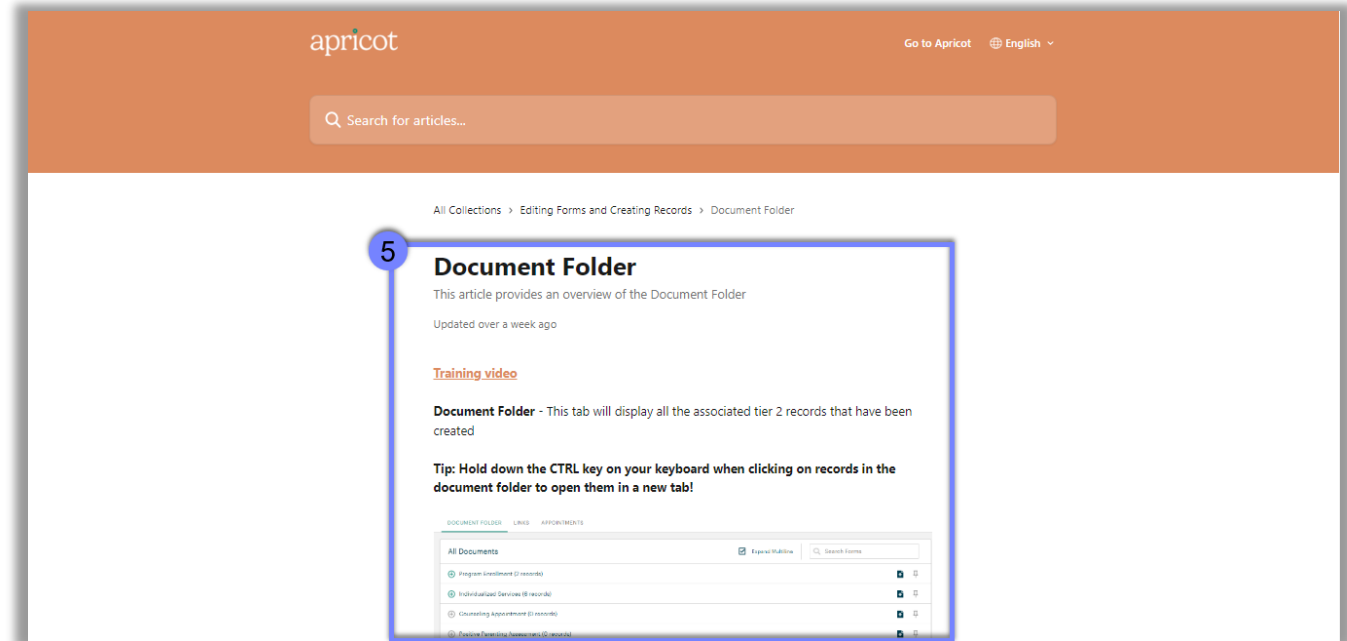
1. Click the Help Center option on the left Navigation Bar
2. Enter the feature name in the Search Terms
3. Select the desired article from Search Results
4. Click Video Link(s) to watch video demo (optional)



# Navigating the Help Center

## Steps to Navigate the Help Center

1. Click the Help Center option on the left Navigation Bar
2. Enter the feature name in the Search Terms
3. Select the desired article from Search Results
4. Click Video Link(s) to watch video demo (optional)
5. Read through article and follow steps
6. Repeat steps to access additional articles



# Contacting Your Administrator



# Contacting Your Administrator

- Request access
- Report an error message
- Clarity on Org. specific Protocol



# Contacting Your Administrator

## Include the following:

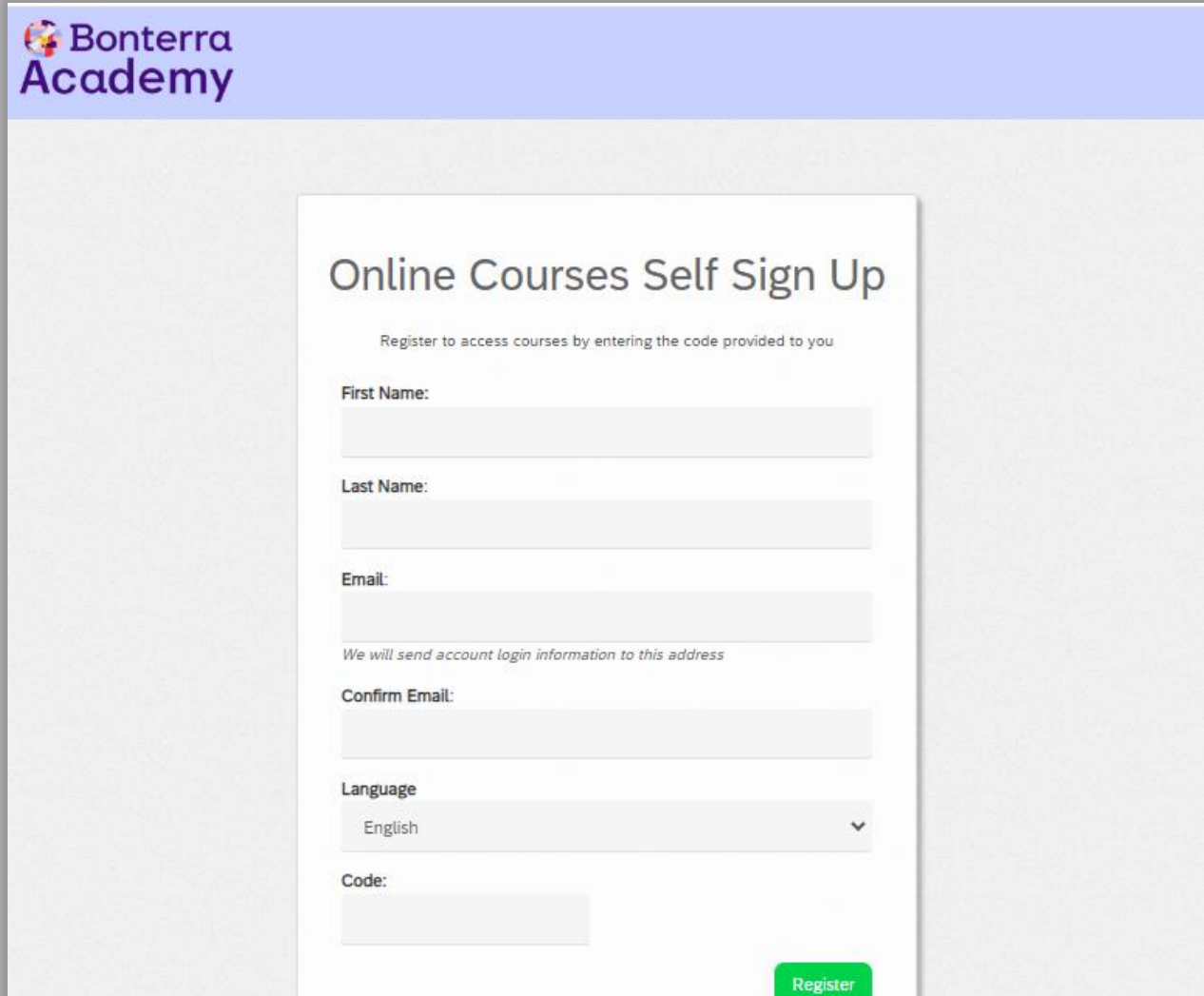
- Program Name
- Name of Form/Feature
- Steps leading to challenge
- Screen Shot

The screenshot displays an email composition window. The 'To' field is 'Support@Helpinghands.org' and the 'Subject' is 'Help Accessing a Form in Apricot'. The email body reads: 'Hello, I'm trying to view and update a counseling appointment for Alonzo LaBatsille in Apricot. However when I'm logged into the Better Homes Program and I open his folder I don't see the Counseling appointment form listed at all 😞 Can you help me please?'. An inset screenshot shows the Apricot interface for user 'Alonzo LaBatsille'. The 'All Documents' section is highlighted, showing a list of document types: 'Program Enrollment and Exit (0 records)', 'Service Tracking (1 record)', 'Positive Parenting Assessment (0 records)', and 'Job Placement (0 records)'. The 'Counseling appointment form' mentioned in the email is not visible in this list.

# Bonterra Academy

# Bonterra Academy

- Free Account
- Accessed via Self Sign – Up link
- Code: Apricot End User



The screenshot shows the Bonterra Academy website header with the logo and name. Below the header is a white form titled "Online Courses Self Sign Up". The form contains the following fields and text:

- Header: Bonterra Academy
- Title: Online Courses Self Sign Up
- Instruction: Register to access courses by entering the code provided to you
- Form Fields:
  - First Name: [Text Input]
  - Last Name: [Text Input]
  - Email: [Text Input]
  - Confirm Email: [Text Input]
  - Language: [Dropdown Menu] (Currently set to English)
  - Code: [Text Input]
- Submit Button: Register

Save for later

# Bonterra Academy

## Steps to Sign Up with Free Account

1. Click the Self Sign – Up link
2. Enter your Name & Email
3. Enter the text **Apricot End User** in the CODE field
4. Click Register

**Online Courses Self Sign Up**

Register to access courses by entering the code provided to you

**2**

**First Name:**  
Elizabeth

**Last Name:**  
Avalos

**Email:**  
lizavalos@gmail.com

*We will send account login information to this address*

**Confirm Email:**  
lizaalos@gmail.com

**Language**  
English

**3**

**Code:**  
Apricot End User

**4**

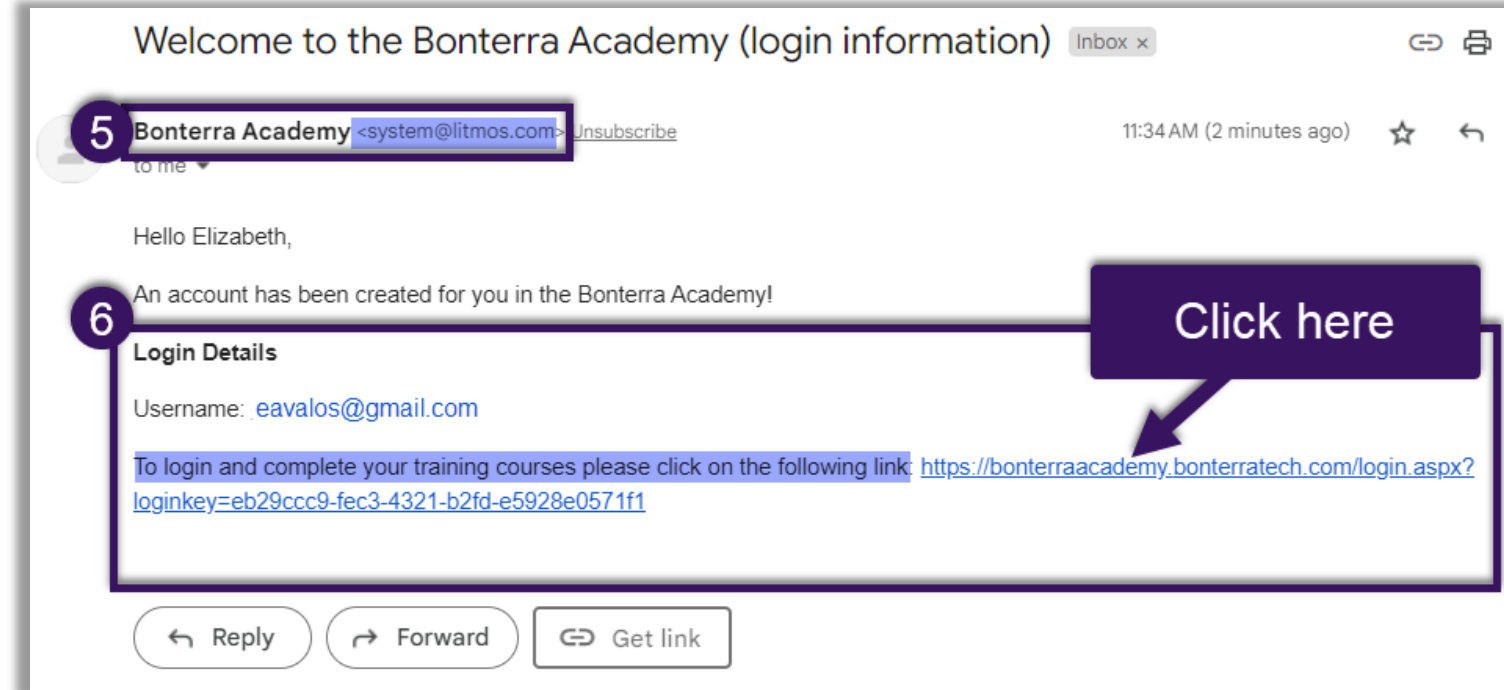
**Register**

Save for later

# Bonterra Academy

## Steps to Sign Up with Free Account

1. Open the Self Sign – Up link
2. Enter your Name & Email
3. Enter the text **Apricot End User** in the CODE field
4. Click Register
5. Look for Email from [system@litmos.com](mailto:system@litmos.com) prompting you to choose password and log in for first time
6. Click the link in the email.

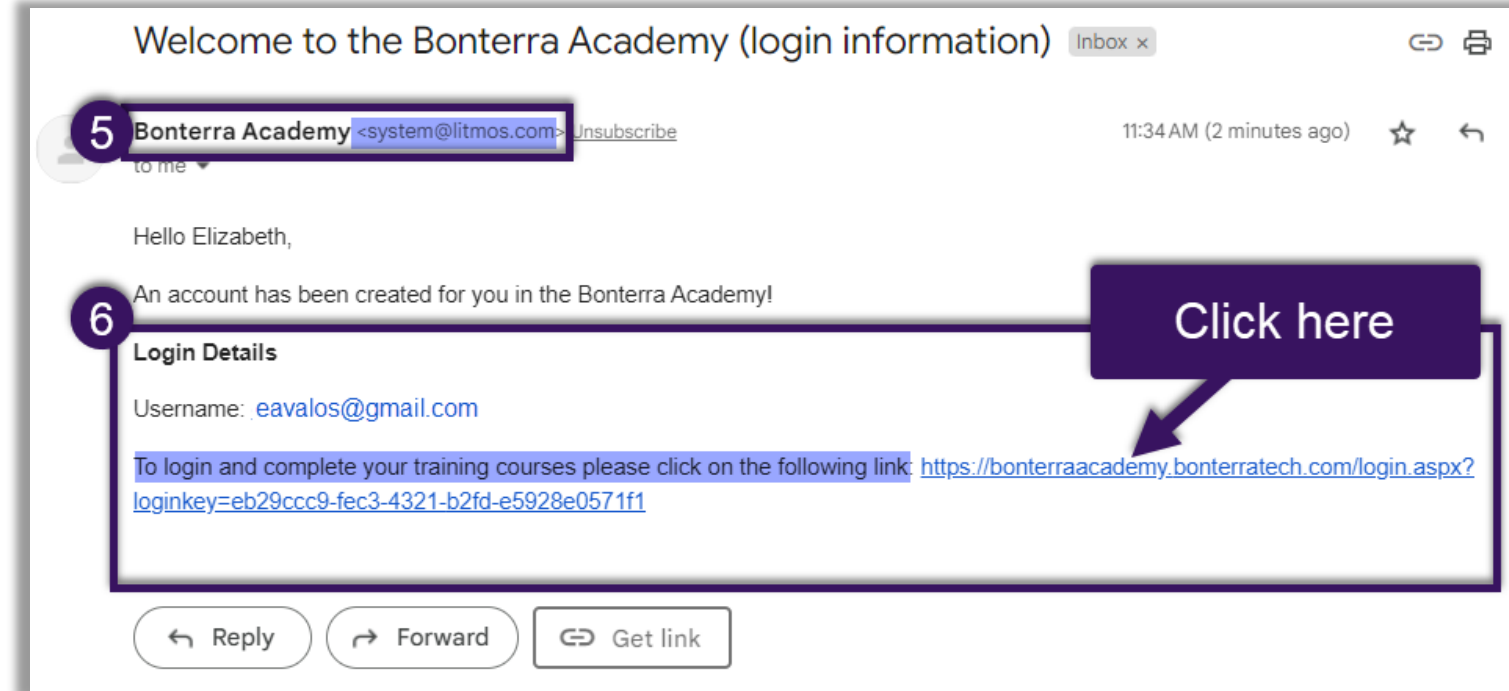


Save for later

# Bonterra Academy

## Steps to Sign Up with Free Account

1. Open the Self Sign – Up link
2. Enter your Name & Email
3. Enter the text **Apricot End User** in the CODE field
4. Click Register
5. Look for Email from [system@litmos.com](mailto:system@litmos.com) prompting you to choose password and log in for first time
6. Click the link in the email
7. Create a password.



Save for later

# Bonterra Academy

## Steps to Sign Up with Free Account

1. Open the Self Sign – Up link
2. Enter your Name & Email
3. Enter the text **Apricot End User** in the CODE field
4. Click Register
5. Look for Email from [system@litmos.com](mailto:system@litmos.com) prompting you to choose password and log in for first time
6. Click the link in the email.
7. Create a Password
8. Click Continue to Log into the Academy

The screenshot shows the Bonterra Academy registration interface. At the top, the logo and name 'Bonterra Academy' are displayed. Below the logo, a greeting reads 'Hello, Elizabeth Avalos'. The main content area is divided into two sections. The first section, labeled '1. Confirm your name' with a note '\* is required field', contains a message: 'Please make sure that we have your first and last names correct.' It features two input fields: 'First Name\*' with the value 'Elizabeth' and 'Last Name\*' with the value 'Avalos'. A purple box with the number '7' highlights the '2. Create a password' section below. The second section, labeled '2. Create a password', includes a light blue box with the text 'Next time you login you will use the following username and password'. Below this, the 'Username' is listed as 'coachsabrinag@gmail.com' and the 'Password\*' field is shown with a masked input. A purple box with the number '8' highlights a 'Continue' button on the right side of the form.



# Learn the Software

## Suggested Learning Path

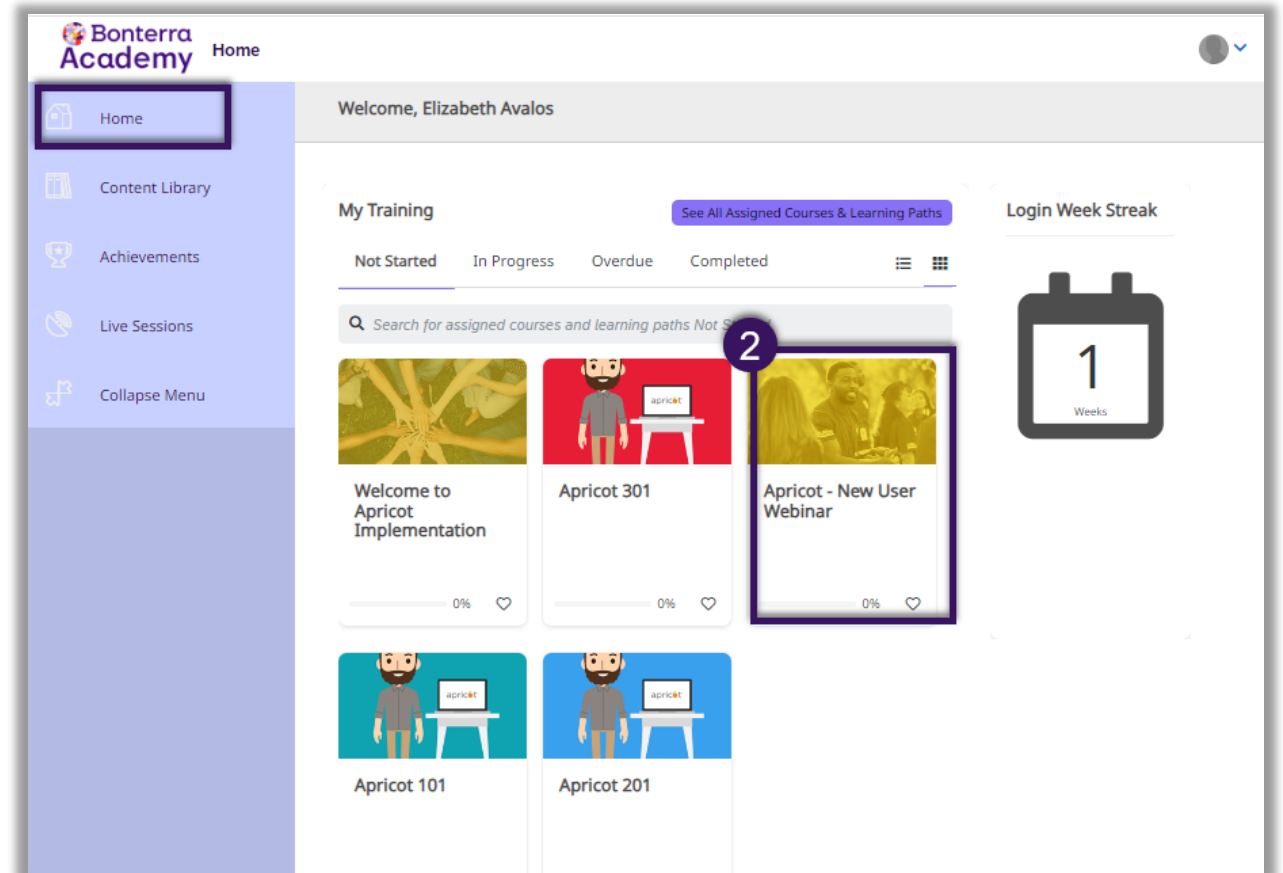
1. Apricot 101, 201, 301

The screenshot displays the Bonterra Academy home page for user Elizabeth Avalos. The interface includes a navigation sidebar on the left with options: Home (highlighted with a purple box), Content Library, Achievements, Live Sessions, and Collapse Menu. The main content area is titled 'Welcome, Elizabeth Avalos' and features a 'My Training' section. This section has tabs for 'Not Started', 'In Progress', 'Overdue', and 'Completed', with 'Not Started' selected. A search bar is present with the text 'Search for assigned courses and learning paths Not Started'. Below the search bar, a grid of course cards is shown. The first row contains three cards: 'Welcome to Apricot Implementation', 'Apricot 301', and 'Apricot - New User Webinar'. The second row contains two cards: 'Apricot 101' and 'Apricot 201'. A purple box highlights the 'Apricot 101' and 'Apricot 201' cards, and a purple circle with the number '1' is placed above them. Another purple circle with the number '1' is placed above the 'Apricot 301' card. To the right of the training section is a 'Login Week Streak' widget showing a calendar icon with the number '1' and the text 'Weeks'. The Bonterra Academy logo and 'Home' text are visible in the top left corner of the interface.

# Learn the Software

## Suggested Learning Path

1. Apricot 101, 201, 301
2. Apricot Foundational Webinars for Data Entry



Save for later

# 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)

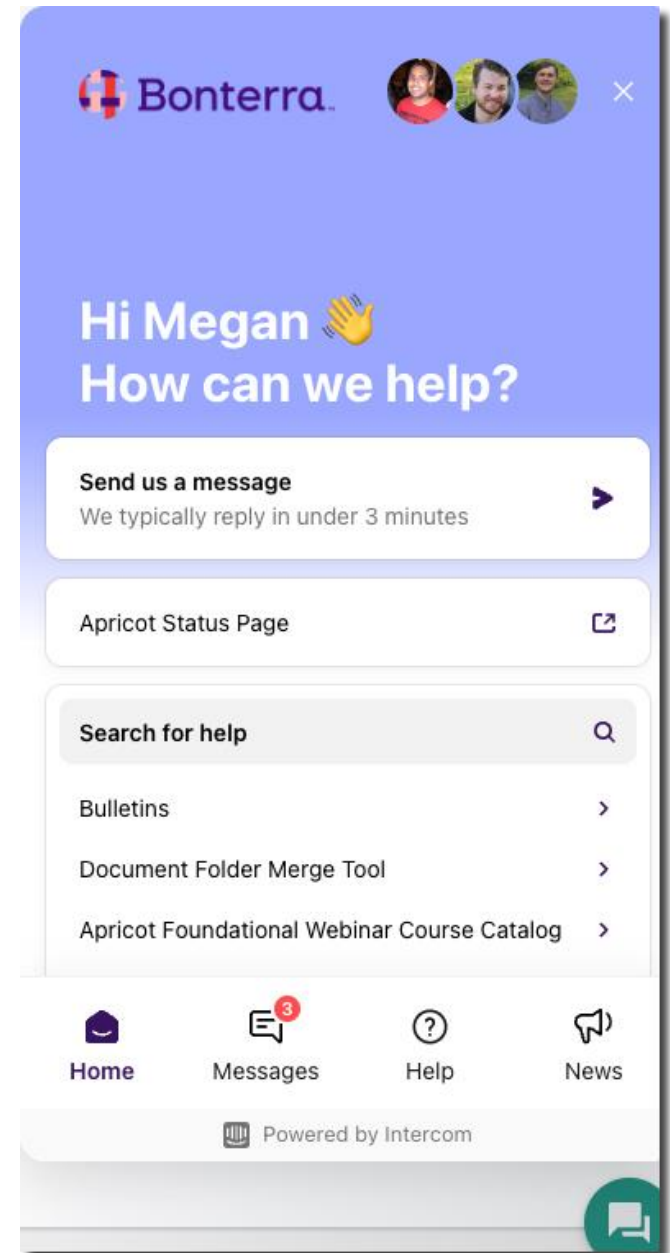


Build confidence & knowledge in  
our software!

# 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.