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CRM FOR ADMINISTRATORS

PRESENTED BY
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RESPONSIBILITIES OF AN ADMINISTRATOR

What are your responsibilities as an Administrator and what power do you have?

akoyaGO ROLES

There are two main security roles
Administrator and a Team user

PERMISSION OVERVIEW

Akoya.net Function	Administrative User	Team User
Data entry/lookup	x	x
Create/update personal views, dashboards, charts, reports	x	x
Create/modify system views, dashboards, charts, reports	x	
View system views, dashboards, charts, reports	x	x
Run a workflow	x	x
Create/modify workflows	x	
Create/modify business rules	x	
Run document templates	x	x
Create/modify document templates	x	
Integrate with Outlook	x	x
Import data	x	
Create/modify forms, entities and fields	x	
Create/modify marketing lists	x	
Create quick campaigns	x	x
Create/modify campaigns	x	
Configure record auditing	x	
Configure duplicate detection rules	x	
Create/modify business units and teams	x	
Manage user roles	x	
Create/modify user security roles	x	
Create/modify security groups	x	

akoyaGO VS. OFFICE 365 ADMIN

You may be an akoyaGO administrator but that does not mean you are an admin (global admin) for your Office 365 Tenant.

What are the differences?

Office 365 Admin

- Manage User within the Tenant
- Give access to all Office 365 Products
- Manage licenses for all products

akoyaGO Admin

- Manage User within akoyaGO
- Manage User Roles (Security)
Have access to Power Apps to make system changes

ONBOARDING USER

Only administrators can add and remove users. What do you need to do to give a new user access? (White Paper in GOSupport Onboarding and Offboarding Users)

Steps to onboard a user:

1. Add the license in O365 if a global admin
2. Add the user (akoyaGO & Business Central)
3. Assign to Group if you are using groups
4. Add Outlook integration
5. Add to akoyaGO subsite in SharePoint
6. Assign Security Roles if using
7. Understand Field Level Security

OFFBOARDING USER

Only administrators can add and remove users. What do you need to do to give a new user access? (White Paper in GOSupport Onboarding and Offboarding Users)

Steps to offboard a user:

1. Reassign records to another user (this will include workflows created by user)
2. You have process or views that looks for that user you must updated those processes.
3. Remove akoyaGo Role
4. Remove PowerApps license (if global admin in Office 365)

SYSTEM DESIGN

- You are in control of ensuring your system is working efficiently
- This captures the data points that help your team process transactions and create tools to analyze data while maintaining data integrity
- How do you do this?
 - Managing your Forms
 - Ensuring you have the right views
 - Efficient Dashboards

...all ensuring the information is always at your fingertips

Form Design

- Maintaining your forms will ensure you are capturing the data you need for the team to do their jobs as well as ensure you are capturing the data points you need
- How do you do this?
 - Fields and Forms
 - Adding and Removing Fields
 - Adding Field Level Security – be cautious here!

System Views

- What is a system view?
 - A system view is a view that is visible to all users
 - It can only be edited by an Administrator
 - Other users can create their own view from a system view
- How do we build a system view?

System Dashboard

- What is System dashboard?
 - System dashboard is like a system view, the dashboard is accessible to all users
 - Only administrators can create a system dashboard
 - Created using PowerApps
- How do we build a system dashboard?

Data Integrity

- Dashboards and views are a great way to ensure data integrity since records can be created in so many ways
 - GOapply
 - GOfund
 - Staff

THANK YOU

Presented By

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