

EMPOWERED

2025 | USER CONFERENCE | DETROIT, MI

TEAMS, SECURITY, AND ONBOARDING: MANAGING STAFF ACCESS & TRANSITIONS

PRESENTED BY

Alyson Belvin, Director of Client Services

akoyago

LEARNING OBJECTIVES

- Best practices for onboarding
- MS Admin Center - Licenses & Teams
- Outlook & Sharepoint Integration
- Security Roles
- Reassigning records, processes
- Letter Templates
- Training
- Best practices for offboarding

GRANTS MANAGER RETIRING

- Jen, the long-time Grants Manager at the Empowered Foundation, has announced her retirement, effective at the end of September.
- Alyson will be her replacement, starting at Empowered Foundation mid-September
- 2 weeks of overlap for Jen to onboard Alyson
- Jen has access to akoyaGO CRM only (no BC)

LICENSES

- In order for both Jen and Alyson to access akoyaGO during the transition period, both need a license
- Power Apps License is needed to access akoyaGO
- License Assignment takes place <https://admin.microsoft.com/#/users>
 - Must have role of Global Admin in MS Tenant or User Administration

Best Practice

If you need additional Power Apps or Business Central licenses, reach out via GOsupport.

TEAMS & GROUPS IN ADMIN CENTER

Microsoft 365 admin center

JCF

Active teams and groups

About Groups Using Teams And SharePoint Where to store files

Teams & Microsoft 365 groups Distribution list Security groups

+ Add a security group + Add a mail-enabled security group Export Refresh

	Name ↑	Email	Sync status	Created on	Choose columns
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

OUTLOOK INTEGRATION

- Enable App for all users
 - Depending when you were installed, may need to complete this step or may have already been done for you

Power Platform Admin Center

- Approve Mailbox
- Test & Enable

New User

- Allow Emails to be sent

SHAREPOINT

- If you have custom SharePoint security, you will need to complete additional set up.

Best Practice

If you don't have any custom SharePoint security, no additional steps needed.

SECURITY

- Security Roles

 - [CRM Standard User Roles Knowledge Article](#)

 - Determine Table (Entity) Level Permissions
 - OOB or custom

- Field Level Security

 - Custom (if your foundation has set this up)

WHAT IS A SECURITY ROLE?

- Assigned to all akoyaGO Users
- All users must be assigned an akoyaGO Admin User, akoyaGO Team User, or akoyaGO Read-Only User Security Role
- All users must be assigned Dynamics Outlook 365 for Outlook integration
- Stack Security Roles; one with greater permissions will take precedence

akoyaGO Functions	Administrator User	Team User	Read-Only User
Data lookup	X	X	X
Data entry	X	X	
Create/update personal views, dashboards, charts, reports	X	X	X
View system views, dashboards, charts, and reports	X	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		

OTHER OUT-OF-THE-BOX SECURITY ROLES

- Stack these with akoyaGO Team or Admin User
- GOapply Administrator
 - Gives user create, read, write, assign, share permissions for GOapply specific tables such as Add GOapply Users, Opportunities, Phases, Status Tracking, etc.
- System Customizer
 - Needed to make system wide changes/customizations in Power Apps
- Send to Accounting
 - Needed to send Request Payments, Gift Payments, and/or Interfund Grants to

CUSTOM SECURITY ROLES

- After assigning out of the box Security Roles, assign/consider any custom Security Roles set up for your organization
 - Example: Empowered has a custom table/entity. In order to access this custom table, Alyson ALSO needs to be assigned the Empowered Custom Security Role.

REASSIGNMENT

- Records
- Processes
 - Checking for hard coded references
 - Example: workflow *EMPOWERED - Send Grant Award Email*
- Sharing Personal Views/Dashboards

Best Practice

If a staff member is offboarding and sharing Personal Views/Dashboards, give ALL permissions to the other users

USING VIEWS

- Email Drafts
- Activities
 - How to find Activities that were reassigned to Alyson

CHECKING OTHER USER FIELDS

- GOapply Settings – Foundation Contact
- GOfund Settings – Foundation User
- GOfund Settings – Foundation User
- GOdonate Settings – Foundation User
- GOapply Opportunity – Internal Phase Contact
- Fund – Foundation Staff Contact
- Custom fields like Program Officer, Grants Manager, Development Staff

Best Practice

Any lookup field to User (excluding Owner) should be checked!

LETTER TEMPLATES

- Jen's name and contact info is included on the *Empowered Award Letter* Letter Template
- Change to Alyson and upload updated version

TRAINING

- Standard Training Menu available on GOsupport
- Check for recordings of previous trainings (saved to akoyaGO constituent)
- Set up Internal trainings to go through your specific processes
 - Who is responsible for what tasks
 - Do you use custom System Views, Workflows, System Dashboards, Letter Templates, etc in your day-to-day processes?

OFFBOARDING

- Alias email to existing email
- Take away Jen's license

THANK YOU

Presented by

Alyson Belvin

Director of Client Services