



# 2018 US Avature Specialist Certification

## First Time Attendees

### What's new in Avature?

2017 released admin-specific features

#### • User Management

- Managing user access to Avature and/or portals
- Roles & access restrictions
- Reporting on user activity

#### • Workflows Bootcamp

- Understanding types of workflows – definition & examples
- Workflow steps:
  - Setting privacy
  - Configuring step's external display
  - Understanding pre-conditions
  - Setting up categories

#### • Workflow Actions

- Available actions
- Considerations
- Setting pre-conditions & delays
- Reporting on people/job progression through Lists & Pipeline report

#### • Data Modelling

- Storing data in Avature – structure design
- Choosing the right field type – considerations, field attributes & examples
- Using fields in views, email templates, lists and portals
- Data Model in Action: real-life scenarios

#### • Avature User Support Understanding Common Exceptions

- Troubleshooting
- Reporting to Technical Support
- Full journal
- Background tasks & massive actions