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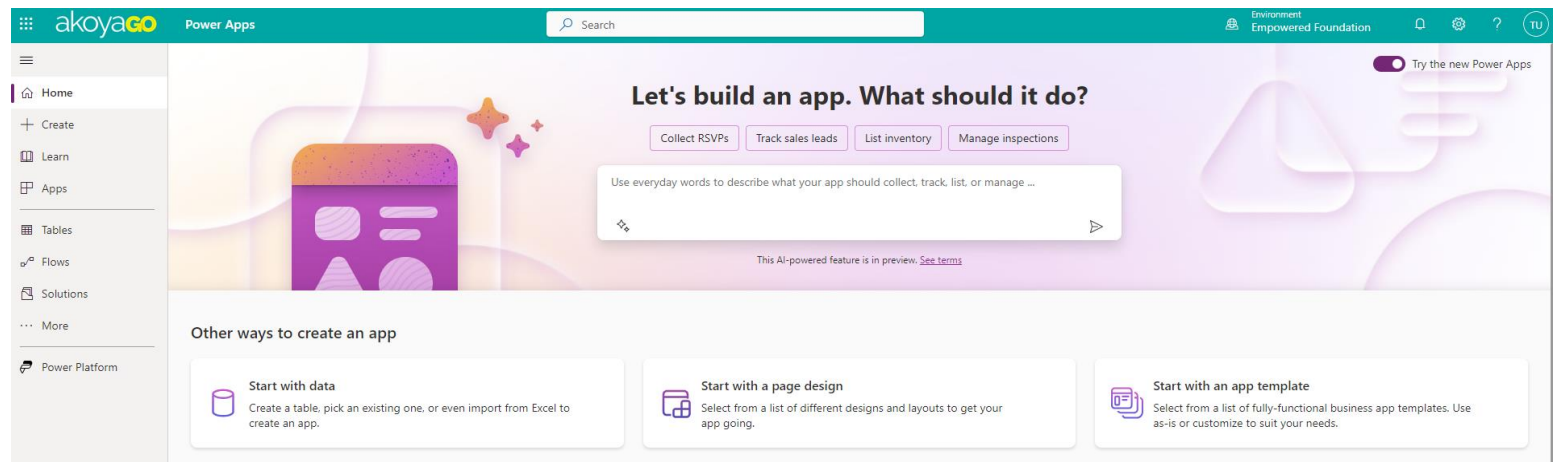
USER CONFERENCE 2023

BASIC CUSTOMIZATIONS IN POWER APPS

PRESENTED BY
JEN TENN AND GAIL SULLIVAN

ACCESSING POWER APPS FROM akoyaGO

- What is Power Apps? How is this different from my akoyaGO site?
 - make.powerapps.com
- Who can access Power Apps?
- Choose Environment with akoyaGO (not Default)



POWER APPS TERMINOLOGY

- Entities = Tables
- Fields = Columns

The screenshot displays the Power Apps interface for a table named 'Request'. The top navigation bar includes 'Power Apps', a search bar, and the environment 'Empowered Foundation'. Below the navigation bar, a toolbar contains options like 'New', 'Edit', 'Create an app', 'Using this table', 'Import', 'Export', 'Advanced', and 'Delete'. The main content area is titled 'Tables > Request' and features four panels: 'Table properties', 'Schema', 'Data experiences', and 'Customizations'. The 'Table properties' panel shows the table's name, type, primary column, and last modified date. The 'Schema' panel, which is highlighted with a red box, lists 'Columns', 'Relationships', and 'Keys'. The 'Data experiences' panel lists 'Forms', 'Views', 'Charts', and 'Dashboards'. The 'Customizations' panel lists 'Business rules' and 'Commands'.

Table properties		
Name	Primary column	Description
Request	Request #	A request for a grant, including information about the applicant, project, process, payments, and requirements.
Type	Last modified	
Standard	4 months ago	

Schema

- Columns
- Relationships
- Keys

Data experiences

- Forms
- Views
- Charts
- Dashboards

Customizations

- Business rules
- Commands

CREATING NEW FIELDS

- First, you must identify the entity/table to which you want to add the field.
 - Example: adding a custom "Withdrawal Notes" field to Request

The screenshot shows the Microsoft Dynamics 365 'Tables' page. The left sidebar contains navigation links: Home, Create, Learn, Apps, Tables (highlighted with a red circle 1), Flows, Solutions, More, and Power Platform. The main area has a top bar with '+ New table', 'Import', and 'Export' options. Below this is a 'Tables' section with tabs for 'Recommended', 'Custom', and 'All' (highlighted with a red circle 2). A search bar at the top right contains the text 'request' (highlighted with a red circle 3). The table list below has columns: Table, Name, Type, Managed, Customizable, and Tags. The 'Request' table is highlighted with a red circle 4.

Table	Name	Type	Managed	Customizable	Tags
Case Suggestion Request Payload	msdyn_casesuggestionreq...	Standard	Yes	Yes	Standard
Custom API Request Parameter	customapirequestparameter	Standard	Yes	No	Managed
Data Movement Service Request	msdyn_dmsrequest	Standard	Yes	Yes	Standard
Data Movement Service Request Status	msdyn_dmsrequeststatus	Standard	Yes	Yes	Standard
EnableArchivalRequest	enablearchivalrequest	Standard	Yes	Yes	Standard
Omnichannel Request	msdyn_ocrequest	Standard	Yes	Yes	Standard
Payment or Requirement	akoya_requestpayment	Standard	Yes	Yes	Standard
Request	akoya_request	Standard	Yes	Yes	Standard

DETERMINE YOUR FIELD TYPE

- After you have determined **where** to build the field (Entity/Table), you need to determine what **type** of field you need

New column

Previously called fields. [Learn more](#)

Display name *

Description ⓘ

Data type * ⓘ

Single line of text

Search

Text

Number

Date and time

Lookup

Choice

Currency

Autonumber

File




Formula (Preview)

MAKING A FIELD REQUIRED

- Business Required vs. Business Recommended
- WARNING - be very thoughtful about the fields you make required!
 - You cannot create or modify a record if you have not populated a required field

023057 - Saved Request

Summary Payments & Requirements Documents Project

Title	+ let's build a playground
Applicant	*  A Hand Up Foundation Inc.
Primary Contact	 Gail Sullivan
Request Type	* Grant Required
Program	+ --- Recommended
Special Request Status	---
Finished	--- 
Interfund Gift	---

ADDING FIELDS TO FORMS; MODIFYING FORM LAYOUT

- We can add our new field to the Request by clicking Forms
- We can also modify the layout of our forms here

The screenshot shows the Power Apps interface for configuring a table named 'Request'. The top navigation bar includes 'Power Apps', a search bar, and the environment 'Empowered Foundation'. Below the navigation bar, there are tabs for 'New', 'Edit', 'Create an app', 'Using this table', 'Import', 'Export', 'Advanced', and 'Delete'. The main content area is divided into several panels:

- Table properties:** A table with columns 'Name', 'Primary column', and 'Description'. The 'Name' column contains 'Request' and 'Type' contains 'Standard'. The 'Primary column' column contains 'Request #' and 'Last modified'. The 'Description' column contains 'A request for a grant, including information about the applicant, project, process, payments, and requirements.'
- Schema:** A panel with options for 'Columns', 'Relationships', and 'Keys'.
- Data experiences:** A panel with options for 'Forms', 'Views', 'Charts', and 'Dashboards'. The 'Forms' option is highlighted with a red box.
- Customizations:** A panel with options for 'Business rules' and 'Commands'.

ADDING FIELDS TO FORMS; MODIFYING FORM LAYOUT

- A form displays your fields so you can interact with your data, allowing you to find or enter information efficiently
- How can I organize my forms?
 - Tab vs a Section
 - Adding Labels
- What if I display the same field in multiple spots?

HIDING AND DELETING FIELDS

- You can hide akoyaGO fields that you do not want to see on the form
 - Best practice is not to delete any akoyaGO out of the box fields
 - You can delete a custom field that you accidentally created or no longer need, but first need to remove dependencies (not displayed on form, in views, BRs, Processes, etc.)

The screenshot shows the 'New Request' form in akoyaGO. The form has a top navigation bar with tabs: Summary, Payments & Requirements, Documents, Project, Scholarship, Process, GOApply, Funding Opportunities, Outcomes, and Interests. The 'Summary' tab is active. The form contains several fields: Title*, Applicant*, Primary Contact, Request Type* (Grant), Program*, Special Request Status, Finished, and Interfund Gift. The 'Interfund Gift' field is highlighted with a red box. On the right side, there is a sidebar titled 'Interfund Gift Lookup' with tabs: Properties, Events, and Business rule. The 'Properties' tab is active, showing 'Display options' for the 'Interfund Gift' table column. The 'Display options' section includes a 'Label*' field set to 'Interfund Gift' and several checkboxes: 'Hide label', 'Hide on phone', 'Hide' (highlighted with a red box), 'Lock', 'Read-only', 'Disable most recently used items', 'Use Main Form Dialog for Create', and 'Use Main Form Dialog for Edit'. Below these options, there is a 'Table' section with 'Gift' and a 'Default view' dropdown set to 'Gift Lookup View'.

BUSINESS RULES

- A Business Rule is a rule that updates one field after an action is taken on another field
- You can use a Business Rule to make a field required only under certain circumstances
- Examples in akoyaGO
 - Decision Date is required on Request only when Original Grant contains data
 - Applicant is not required when Request Type = Scholarship

BUSINESS RULES

Let's make Withdrawal Notes only required if Special Request Status = Withdrawn

Tables > Request

Table properties

Request

Type

Standard

Primary column

Request #

Last modified

4 months ago

Description

A request for a grant, including information about the applicant, project, process, payments, and requirements.

Schema

Columns

Relationships

Keys

Data experiences

Forms

Views

Charts











Dashboards

Customizations

Business rules

Commands

BUSINESS RULES

+ New business rule  Advanced ▼			
Tables > Request > Business rules ▼			
Name ↑ ▼		Status ▼	Scope ▼
Class Rank Score		On	Table
Default to Grant as Request Type		On	Table
Make Received date contain data		On	Table
Not require applicant for scholarships		On	Table
Require Decision Date if original grant contain...		Off	Request (Accounting)
Set Request Status		On	Table
Set status to "awaiting third party reply"		On	Table
Set Status to In review		On	Table
Show import detail if it contains data		On	Table

Peer Presenter:

Laura Gano, Peter Kiewit Foundation
HR and Grants Manager

REQUEST ENTITY

023080 - Saved
Request

Approved
Request Status

7/6/2023
Decision Date



Arts, Culture
Program

\$1,000.00
Grant Amount

▼

Summary Payments & Requirements Documents Project Scholarship **Process** GOapply Funding Opportunities Outcomes Interests Internal Information Related ▼

LETTER OF INTENT

LOI Received	---	
LOI Acknowledged	---	
LOI Decision Date	---	
LOI Requested Amount	---	

APPLICATION

Request Received	---	
Request Acknowledged	---	

DECISION

Decision Date	7/6/2023	
Board Summary Notes	---	
Review Complete	No	
Denial Reason	---	
Date Notified	---	
Conditions	---	

SITE VISIT

Site Visit Date	---	
Site Visit Notes	---	

RECOMMENDATION INFO

GOfund Recommender	---	
Anonymous	No	
Grant Recommender	---	
Grant Recommender Email	---	
Grant Recommender Phone	---	
Grant Recommender Certification	No	
Recommended Payment Date	---	

UTILIZING CUSTOMIZED FIELDS & TABS

009111 - Saved
Request

Completely KIDS
Applicant




Approved
Request Status

3/7/2023
Decision Date




\$525,000.00
Grant Amount

Cover Sheet Request Breakdown What's New & Notes Payments & Requirements App Review (Process) Grant Agreement File Closure Internal Information Related

Submission

Title	To provide three years of general o...
Concept	 To provide three years of general ...
GOapply Phase	---
GOapply Application ID	 Renewal Application
Application ID	---
Request Received	11/15/2022 
Submission Accepted	Yes

Application Review

CIO	 Pat Thraen
Reviewer 1	 Pat Thraen
Reviewer 2	 Liz Codina
Full Team Review	<input type="checkbox"/>
Grant App Review Meeting Complete	Yes

Site Visit

Site Visit Needed?	No
--------------------	----

Decision

Request Status	Approved
Special Request Status	---
Cover Sheet	Individual
CIO Meeting Review Date (Application)	12/6/2022 
Board Meeting Date	3/7/2023 
Decision Date	3/7/2023 

IMPROVED INTERNAL PROCESSES

CIO Task Management ▾

Synopsis Generated (Ready for CIO Edits)

Search



No data available.

ABC 0 - 0 of 0

New Submissions Ready for Review

Search

0

009126

KANEKO

To provide capital support for the Collection Building.

0

009120

Omaha Botanical Center, Inc.

To provide capital support for the Old Market Park and ...

0

009177

University of Nebraska Foundation

To provide capital support for Project NExT.

ABC 1 - 3 of 3

Requests 'Approved' – Terms not Complete

Search



No data available.

ABC 0 - 0 of 0

CALCULATED FIELDS

009111 - Saved Request

Completely KIDS Applicant

Approved Request Status

3/7/2023 Decision Date

\$525,000.00 Grant Amount

Cover Sheet

Request Breakdown

What's New & Notes

Payments & Requirements

App Review (Process)

Grant Agreement

File Closure

Internal Information

Related

Funding Requested - Overview (calculates from below)

Number of Years of Funding Requested	3		
Total Project Cost	\$20,590,246		
Funds Available	\$4,664,110	Funds Available Percent of TPC	22.65
Balance Needed	\$15,926,136	Balance Needed Percent of TPC	77.35
Requested Amount	\$600,000	Requested Amount Percent of TPC	2.91

Funding Requested - Breakdown by Year

1st Year Period	1/1/2023-12/31/2023	2nd Year Period	1/1/2024-12/31/2024	3rd Year Period	1/1/2025-12/31/2025
1st Year Total Project Cost	\$6,736,583	2nd Year Total Project Cost	\$6,863,837	3rd Year Total Project Cost	\$6,989,826
1st Year Funds Available	\$3,130,110	2nd Year Funds Available	\$917,000	3rd Year Funds Available	\$617,000
1st Year Balance Needed (calculated)	\$3,606,473	2nd Year Balance Needed (calculated)	\$5,946,837	3rd Year Balance Needed (calculated)	\$6,372,826
1st Year Requested Amount	\$200,000	2nd Year Requested Amount	\$200,000	3rd Year Requested Amount	\$200,000

QUESTIONS?

THANK YOU

Presented By

Jen Tenn

Project Manager



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the conference album!

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