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**EMPOWERED**

USER  
CONFERENCE  
2023

# EMPOWERED

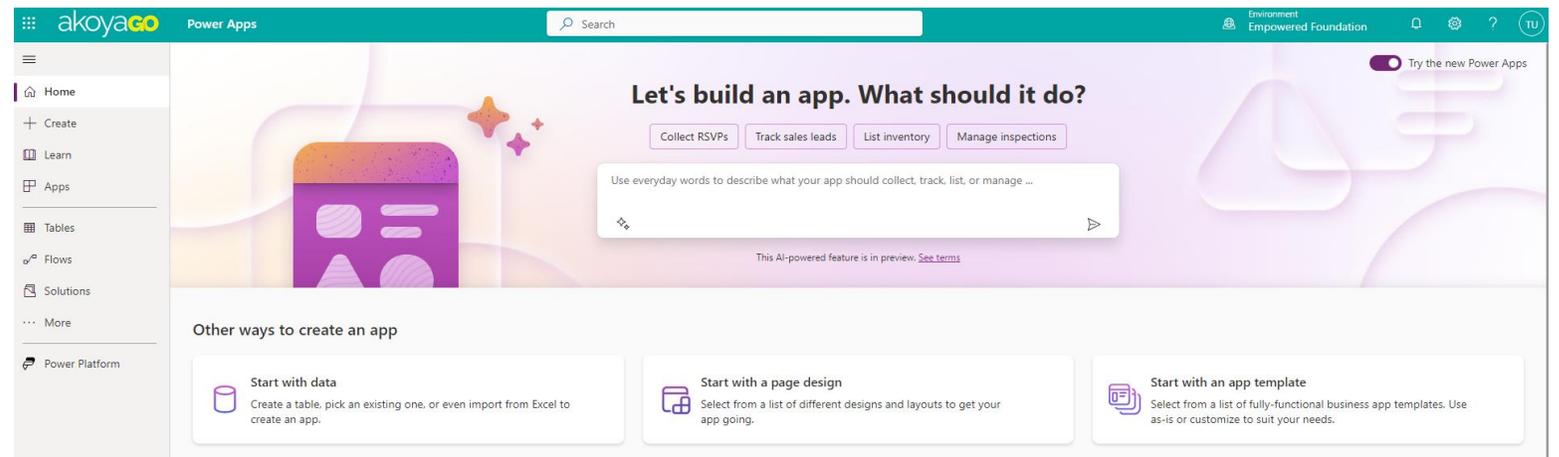
USER CONFERENCE 2023

## 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](https://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 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 action buttons for '+ New', 'Edit', 'Create an app', 'Using this table', 'Import', 'Export', 'Advanced', and 'Delete'. The main content area is titled 'Tables > Request' and contains four panes: 'Table properties', 'Schema', 'Data experiences', and 'Customizations'. The 'Table properties' pane shows the table name 'Request', its type 'Standard', and the last modified date '4 months ago'. The 'Schema' pane is highlighted and contains three options: 'Columns' (which is circled in red), 'Relationships', and 'Keys'. The 'Data experiences' pane lists 'Forms', 'Views', 'Charts', and 'Dashboards'. The 'Customizations' pane 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	

# 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-hand navigation pane has the 'Tables' option highlighted with a red circle '1'. The main content area shows a list of tables. The 'Request' table is selected, indicated by a red circle '4' next to its name. The search bar at the top right contains the text 'request' and is highlighted with a red circle '3'. The 'All' filter tab is also highlighted with a red circle '2'. The table list includes columns for Name, Type, Managed, Customizable, and Tags.

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

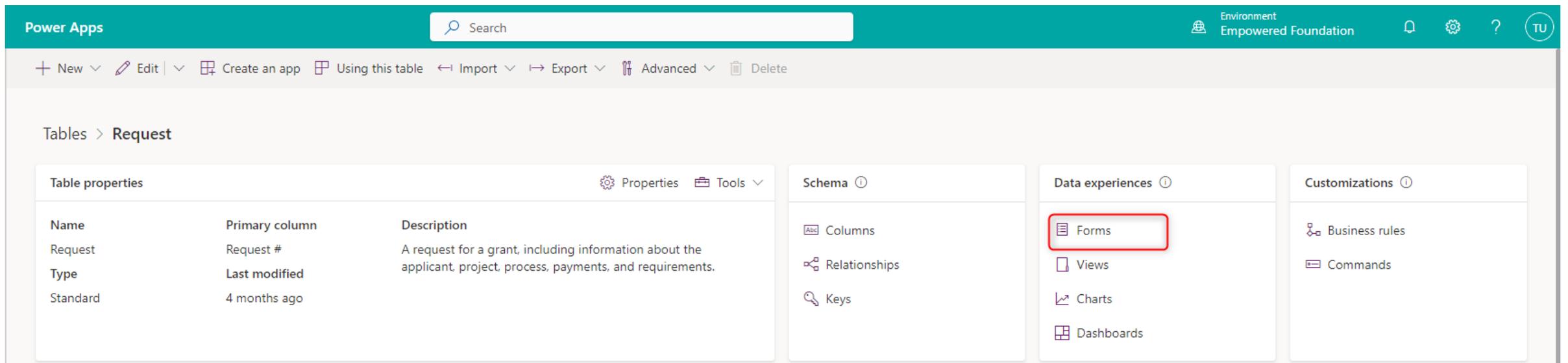
023057 - Saved  
Request

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 several action buttons: '+ 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', 'Type' is 'Standard', 'Primary column' is 'Request #', and 'Last modified' is '4 months ago'. The 'Description' is 'A request for a grant, including information about the applicant, project, process, payments, and requirements.'
- Schema:** Contains options for 'Columns', 'Relationships', and 'Keys'.
- Data experiences:** Contains options for 'Forms', 'Views', 'Charts', and 'Dashboards'. The 'Forms' option is highlighted with a red box.
- Customizations:** Contains 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 is divided into several sections: 'Title\*', 'Applicant\*', 'Primary Contact', 'Request Type\*' (with a sub-section for 'Grant'), 'Special Request Status', 'Finished', and 'Interfund Gift'. The 'Interfund Gift' field is highlighted with a red box. On the right side, there is a 'Properties' panel for the 'Interfund Gift' field. Under the 'Display options' section, the 'Hide' checkbox is checked and highlighted with a red box. Other options include 'Hide label', 'Hide on phone', 'Lock', 'Read-only', 'Disable most recently used items', 'Use Main Form Dialog for Create', and 'Use Main Form Dialog for Edit'. The 'Default view' is 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			Properties	Tools
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

# BUSINESS RULES

[+ New business rule](#) [Advanced](#) ▼

Tables > Request > Business rules ▼

Name <span>↑</span> <span>▼</span>	Status <span>▼</span>	Scope <span>▼</span>
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	Application Review	Decision
Title To provide three years of general o...	CIO PT Pat Thraen	Request Status Approved
Concept To provide three years of general ...	Reviewer 1 PT Pat Thraen	Special Request Status ---
GOapply Phase ---	Reviewer 2 Liz Codina	Cover Sheet Individual
GOapply Application ID Renewal Application	Full Team Review <input type="checkbox"/>	CIO Meeting Review Date (Application) 12/6/2022
Application ID ---	Grant App Review Meeting Complete Yes	Board Meeting Date 3/7/2023
Request Received 11/15/2022	Site Visit	Decision Date 3/7/2023
Submission Accepted Yes	Site Visit Needed? No	

# 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 ⋮



009126  
KANEKO  
To provide capital support for the Collection Building.



009120  
Omaha Botanical Center, Inc.  
To provide capital support for the Old Market Park and ...



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](#)

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**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

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**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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