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2023

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USER CONFERENCE 2023

MAKING GOapply MORE USER FRIENDLY

PRESENTED BY
JEN TENN AND GAIL SULLIVAN

GOAL OF THIS SESSION

- Help you help your applicants
 - Utilizing resources and tools
 - Tips and tricks
 - Troubleshooting with your applicants

GOapply COMPONENTS

- GOapply UI – Applicant Portal
- GOapply App – in akoyaGO; where you will manage applications, status tracking records, users
- GOManager - Builder

GOapply SETTINGS

The screenshot displays the 'akoyaGO GOapply' settings interface. The top navigation bar includes a search bar and a 'SANDBOX' label. The left sidebar lists various settings categories, with 'GOapply Settings' currently selected. The main content area shows the '1000 - Saved GOapply Settings' configuration. The 'General' tab is active, displaying settings for 'GOapply URL', 'Applicant Approver', 'Registration Status', 'Foundation Contact', 'Allowable Registration Type', and 'Theme'. The 'Theme' section includes options for 'Primary Logo', 'Navbar Logo', 'Body Background Color', 'Primary Color', 'Secondary Color', and 'Global Link Color'. The 'Labels' section shows 'Application Apply' and 'Login Instruction'.

akoyaGO GOapply | Search | SANDBOX

1000 - Saved
GOapply Settings

General | Organization Profile Form Editor | Related

GOapply URL: <https://goapply2.akoyago.com/Empowered>

Applicant Approver: Automatic Approval

Registration Status: Open

Foundation Contact: Training User

Allowable Registration Type: Both

Theme

Primary Logo: [Logo] [Open] [Delete]

Navbar Logo: [Logo] [Open] [Delete]

Navbar Background Color: ---

Body Background Color: ---

Primary Color: ---

Secondary Color: ---

Global Link Color: ---

Labels

Application Apply: Apply

Login Instruction: login instructions xxx

REGISTRATION AND APPROVAL SETTINGS

1000 - Saved

GOapply Settings

1000 ID

General

Organization Profile Form Editor

Related

GOapply URL

https://goapply2.akoyago.com/Empowered

Applicant Approver

* Automatic Approval

Registration Status

* Open

Foundation Contact



* TU Training User

Allowable Registration Type

* Both

CUSTOMIZING YOUR GOAPPLY USER INTERFACE

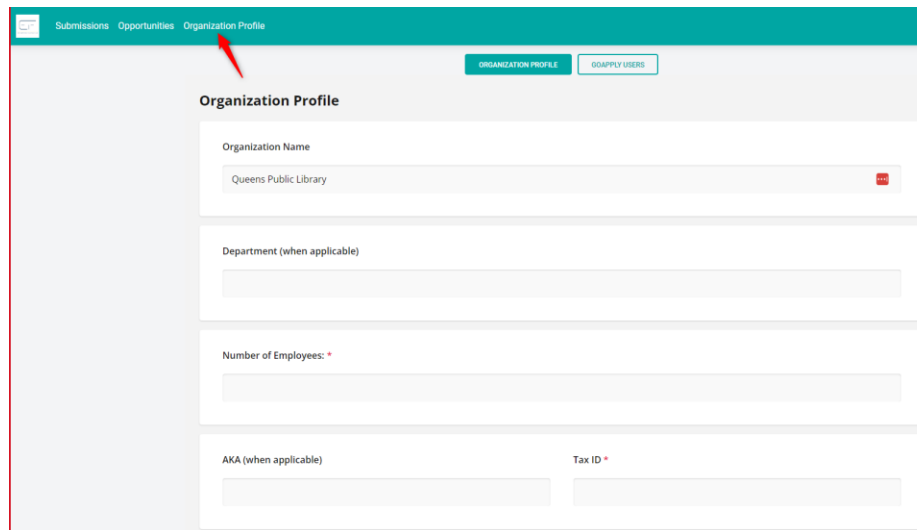
Theme

| | | | | | |
|--------------|---|-------------------------|---|-----------------------|-----|
| Primary Logo |  | Navbar Logo |  | Body Background Color | --- |
| | <input type="button" value="Open"/> <input type="button" value="Delete"/> | | <input type="button" value="Open"/> <input type="button" value="Delete"/> | Primary Color | --- |
| | | Navbar Background Color | --- | Secondary Color | --- |
| | | | | Global Link Color | --- |

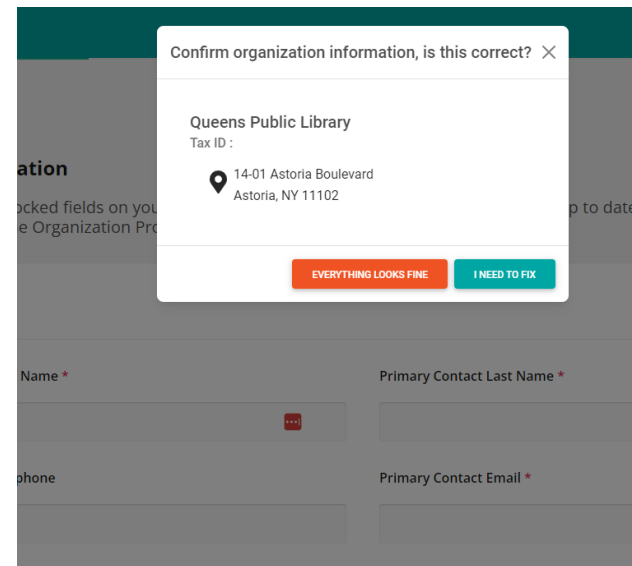
<https://gosupport.powerappsportals.com/knowledgebase/article/KA-01178/en-us>

ORGANIZATION PROFILE

- Organization users only
- View or edit organization information not specific to an application



The screenshot shows a web application interface with a teal header bar containing navigation links: Submissions, Opportunities, and Organization Profile. A red arrow points to the Organization Profile link. Below the header, there are two buttons: ORGANIZATION PROFILE (highlighted) and GO APPLY USERS. The main content area is titled "Organization Profile" and contains several input fields: Organization Name (with "Queens Public Library" entered), Department (when applicable), Number of Employees (marked with a red asterisk), AKA (when applicable), and Tax ID (marked with a red asterisk). Each field has a red "X" icon on the right side of the input box.



The screenshot shows a confirmation dialog box titled "Confirm organization information, is this correct?" with a close button (X). The dialog displays the following information: "Queens Public Library", "Tax ID:", and a location pin icon followed by "14-01 Astoria Boulevard, Astoria, NY 11102". At the bottom of the dialog are two buttons: "EVERYTHING LOOKS FINE" (orange) and "I NEED TO FIX" (teal). The background of the dialog is semi-transparent, showing parts of the organization profile form.

ORGANIZATION PROFILE FORM EDITOR

1000 - Saved
GOapply Settings

1000
ID

General **Organization Profile Form Editor** Related ▾

Org Profile Form Definition [OrgProfileFormDefinition_8e54cc05-ec55-ed11-bba3-00224824973c_2023-04-26T14:15:57Z.json](#) Delete

Display GOapply Users ☒

Launch Form Editor
Opens the form editor in a new browser tab

ORGANIZATION PROFILE FORM EDITOR

How can I adjust what my applicants are allowed to enter or modify in the Organization Profile?

The screenshot displays the GOManager web application interface for editing an organization profile. The top navigation bar includes 'GOManager', 'Home', 'GOapply', and 'GOfund'. The main content area is titled 'Organization Profile' and features a 'Survey Designer' tab. Below the title, there are input fields for 'Organization Name' (with a 0/160 character limit) and 'Department (when applicable)' (with a 0/100 character limit). At the bottom, there are fields for 'AKA (when applicable)' and 'Tax ID'. On the right side, a 'TOOLBOX' panel lists various form elements that can be added to the profile, including 'Editor', 'Account Number', 'ACH Default', 'Address 1', and various address components like 'Address 1: Address Type', 'Address 1: City', 'Address 1: Country/Region', 'Address 1: County', 'Address 1: Fax', 'Address 1: Freight Terms', 'Address 1: Name', 'Address 1: Post Office Box', 'Address 1: Primary Contact Name', 'Address 1: Shipping Method', 'Address 1: State/Province', 'Address 1: Street 1', 'Address 1: Street 2', and 'Address 1: Street 3'.

ORGANIZATION PROFILE FORM EDITOR

- What type of questions to include?
 - Fields truly about the organization that you want to overwrite on the constituent record
- Applicants don't need to fill out with every request, but instead update as needed
- Examples: No of Employees, Social Media Sites, Purpose/Mission

GObapply UI – SUBMITTED DASHBOARD

- Applicants can access past applications, reports, etc. from the Submitted Dashboard
- Can download as PDF

GOapply APPLICANT GUIDE

- We offer a template GOapply Applicant Guide you can provide to your applicants to help them navigate the applicant portal
- This is available as a Word document so you can customize with instructions specific to your organization

<https://gosupport.powerappsportals.com/knowledgebase/article/KA-01171/en-us>

TROUBLESHOOTING

- What can I use on the backend to help troubleshoot issues for my applicants?
 - GOapply Users
 - GOapply Status Tracking

GOapply USERS

- Can start here to see if a user has successfully registered
 - Will let you know if they registered as an Organization or Individual (Parent Constituent)
- User Role (Applicant, Reviewer, or Both)
- User Permissions
 - Contributor cannot submit
- Status Reason
- Can see related Status Tracking Records

GOapply STATUS TRACKING RECORDS

How can I use them to track
in-progress and completed
submissions?

The screenshot displays the akoyaGO GOapply Status Tracking interface. The top navigation bar includes the akoyaGO logo, a search bar, and a menu with options like Home, Recent, and Pinned. The left sidebar lists various application management tools, with 'GOapply Status Tr...' highlighted. The main content area shows details for application 0001003, including the applicant organization 'A Healthier You Inc.', the application name 'Grant Application', and a progress status of 100%. The interface is clean and professional, with a teal and white color scheme.

akoyaGO GOapply

0001003 - Saved
GOapply Status Tracking

General Internal Related

GOapply Applicant Organization: A Healthier You Inc.

GOapply User: ---

GOapply Application: 001002

GOapply Application Name: Grant Application

Request: 022938

Current Phase: 001002

GOapply Phase Name: Application

Override Phase Due Date: ---

Current Phase Status: Submitted

Progress (%): 100

Most Recent Submit Date: 10/27/2022 7:06 AM

Submitter: gail@akoyago.com

GOapply STATUS TRACKING RECORDS

- Applicant will have a unique Status Tracking record for each phase
- Submission Status
- Errors
- Changing Status back to InProgress

IMPERSONATE APPLICANTS

- Foundation staff can view GOapply as a specific applicant to help and troubleshoot
 - Start from User record
 - Click Impersonate
 - Can do anything the user has permission to do

The screenshot displays the GOapply web application interface. At the top, there is a teal header bar with the 'GOapply' logo, a search bar, and the word 'SANDBOX' followed by several icons. Below the header is a toolbar with various action buttons: 'Save', 'Save & Close', 'New', 'Impersonate' (highlighted with a red box), 'Deactivate', 'Delete', 'Refresh', 'Check Access', 'Assign', 'Flow', and 'Share'. The main content area shows a user record for 'erenadlz@wired.com'. The record includes tabs for 'User Info', 'Registration Info', 'Activation URLs', 'Status Tracking', 'GOapply Responses', 'Internal', and 'Related'. The 'User Info' tab is active, displaying a table with the following details:

| | | | |
|--------------------|---------------------------------|------------------|--------------------|
| First Name | Betty | Last Name | Delwater |
| Applicant Type | Organization | Email | erenadlz@wired.com |
| Parent Constituent | 701 Center for Contemporary Art | | |
| Role | Applicant | User Permissions | Submitter |

GOapply ADMIN GUIDE

- Helpful Knowledge Article covering all things GOapply
- Will walk you through the items covered today

<https://gosupport.powerappsportals.com/knowledgebase/article/KA-01077/en-us>

Peer Presenter:

Chamika Ford, Saginaw Community Foundation
Program Officer

APPLICATION GUIDE VIDEOS

- **Why**

- Helps guide applicants through the application
- Share important information on what your reviewers are expecting

- **How**

- Record a Zoom meeting using the share screen option
- Collaborate with the marketing team or use a video editing software (ex. Adobe Premiere) to edit the videos
- Use a video platform to link the videos to your organization's website



APPLICATION CREATION

- Using Tool Tips
 - Adds additional instructions or descriptions to questions
 - Add scholarship criteria within the application

The screenshot displays the AkoyaGO application creation interface. On the left, a list of scholarships is shown, including 'Thomas Burkhardt Scholarship (for law or music)', 'Mary Ellen Gase Scholarship', 'Gospel Fest Music Arts Scholarship', and 'Ruth Mitchell Hanson Scholarship'. Each entry has an 'Apply' button. A tooltip is visible over the 'Mary Ellen Gase Scholarship' entry, showing its details. The detailed view on the right includes a 'General' tab with a 'Name' field set to 'Mary Ellen Gase Scholarship', a 'Target entity' field, and a 'Target field' field. It also has checkboxes for 'Hide from Reviewer', 'Lookup Field', and 'Override Field'. The 'Qualifications' section lists criteria: 'Minimum 3.0 GPA', 'High school senior in voice/keyboard from Saginaw Arts and Sciences Academy (SASA), or choir at Arthur Hill High School or Saginaw High School', 'Four semesters in choir or voice/keyboard department', 'Pursuing an undergraduate degree in choral or keyboard music education or performance', and 'Full-time enrollment'. A note at the bottom states: '*Applicants must upload or provide a link to a video performance or audition'.

APPLICATION CREATION

- Logic Branching
 - Filtering the application
 - Current Educational Status
 - School
 - Employment history

The image displays three overlapping screenshots of the 'Saginaw Community Foundation Scholarship Application' form, demonstrating how logic branching is implemented based on the 'Current Educational Status' field.

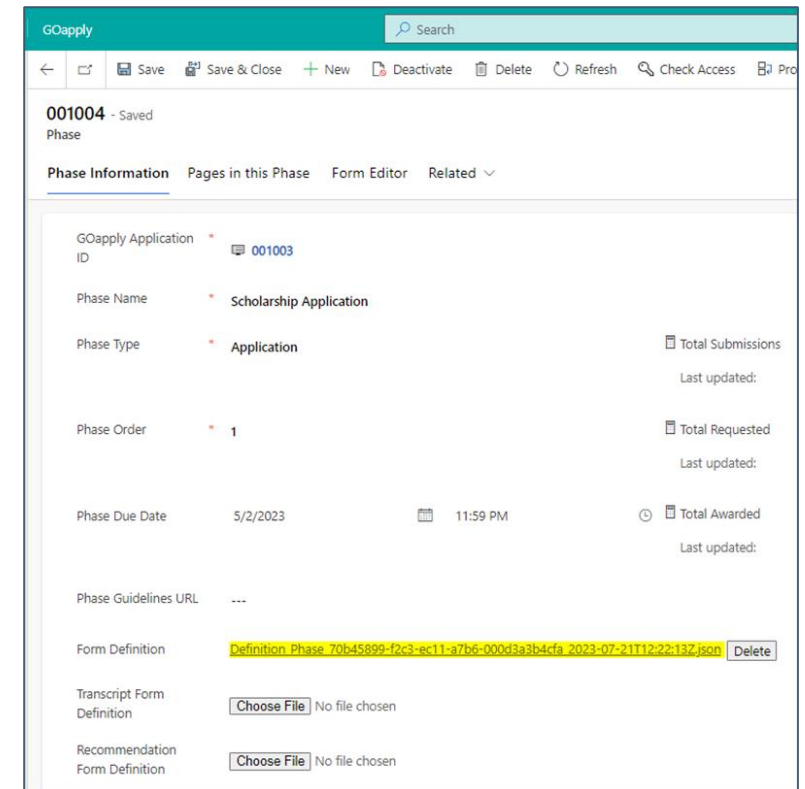
Top Screenshot (Page 6 of 15): Shows the 'Education Information' section with the 'Current Educational Status' dropdown menu open, displaying 'Select...'. Below the dropdown, it says 'You may continue to the next page'.

Bottom Left Screenshot (Page 6 of 15): Shows the 'Education Information' section with 'Current Educational Status' set to 'College Freshman'. The 'High School Attended' dropdown is visible below it.

Bottom Right Screenshot (Page 6 of 15): Shows the 'Education Information' section with 'Current Educational Status' set to 'High School Senior'. This view includes additional fields: 'High School' (dropdown), 'High School County' (dropdown), 'High School Graduation Year' (text input), 'High School GPA' (text input), 'Are you attending Great Lakes Early College?' (dropdown), 'Colleges/Universities Applied To' (text input with instructions), 'Degree Type' (dropdown), and 'Are you a dual-enrolled student?' (dropdown).

Troubleshooting

- Form Definition Files
 - Download, save and upload when needed
 - A starting place for future applications and forms
 - Duplicate the application or Reviewer criteria form
- Test the application
 - Ask your colleagues to help by submitting a mock application



The screenshot shows the 'GOapply' interface for a 'Phase' named '001004 - Saved'. The page has a teal header with a search bar and navigation icons. Below the header, there's a 'Phase Information' tab selected, with other tabs like 'Pages in this Phase', 'Form Editor', and 'Related'. The main content area displays various fields for the phase:

- GOapply Application ID:** 001003
- Phase Name:** Scholarship Application
- Phase Type:** Application
- Phase Order:** 1
- Phase Due Date:** 5/2/2023, 11:59 PM
- Phase Guidelines URL:** ---
- Form Definition:** Definition Phase: 70b45899-f2c3-ec11-a7b6-000d3a3b4cfa 2023-07-21T12:22:13Z.json (with a 'Delete' button)
- Transcript Form Definition:** Choose File (No file chosen)
- Recommendation Form Definition:** Choose File (No file chosen)

On the right side, there are summary statistics: 'Total Submissions', 'Total Requested', and 'Total Awarded', each with a 'Last updated:' timestamp.

QUESTIONS?

THANK YOU

Presented By

Jen Tenn

Project Manager



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the conference album!

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