

December 2025 User Group - Grants and Scholarships in GOapply – Meeting Transcript

Addie Kelzer 1:00

I do see a couple of items in the forum so we can bring those questions forward, but if you have placed any of those questions in the forum, feel free to not wait for me.

You can raise your hand at any time to bring those forward.

So to get us started, let's go ahead and use the chat functionality to introduce yourselves. Let's go with your name, your organization, the role that you serve in in your organization.

And then maybe just something you're looking forward to during this holiday season or end of year. Maybe you just want the year to be done, I don't know, but just something you're looking forward to this time of year would be a nice fun thing to share. So while you're getting started in the chat.

I'll just introduce myself. My name is Addie Kelzer. I'm the Manager of Client Experience here at akoyaGO, working with the Account Management team. I have a couple colleagues on the line that might help answer a few questions or dig up a couple resources if needed.

So I know we sometimes lean on those in for me internal resources for a couple of functionality answers here and there, but I want to also shine the light on the focus of user group is really to help you all engage with each other and so I'm hoping that when you bring.

Amy Pancake 2:18

OK.

Kaley Greene 2:19

The general.

Addie Kelzer 2:25

Forward. Most of those are going to be geared at your peers to help you ideate processes or questions about standard functionality or something you're thinking about implementing or changing, and then we'll chime in if we need to.

Amy Pancake 2:34

Yeah.

Addie Kelzer 2:41

So I see the chat is going. I'm going to get rid of a little bit of background noise here, but otherwise I want to go ahead and open it up right away for anybody that has a question. I know that this hour goes fast, so feel free to unmute yourself or.

Or to raise your virtual hand if you have a question. And then it's also just nice to see people on camera if you have the availability to turn your camera on and join us virtually. All right, Karen, I see you have your hand up. Do you want to lead us off with the first question?

Amy Pancake 3:16

Yeah.

Karin-EWVCF 3:20

Yes, if I could. The question is when you have a for scholarships, if you have a large volume of students for one scholarship, for instance, 200 students for one scholarship, how do you, how does everybody kind of break those down in order to?

Addie Kelzer 3:22

Great.

Karin-EWVCF 3:40

Make it manageable for your reviewers to to take a look at that, because obviously we don't want to send all of them through.

Kirsten Avey 3:43

At.

Addie Kelzer 3:47

So a lot of requests that are part of 1 reviewer group feels like a lot for the reviewers. OK, great.

Karin-EWVCF 3:51

Yes.

Correct.

Yeah, we just want to make it more manageable.

Addie Kelzer 4:00

Mhm.

Who's got some thoughts for Karen?

If you have ideas, go ahead and unmute yourself.

Marla Aronovitch 4:20

Oh sure, I can go first. So what I did is I break my reviewer group into. I do it usually into thirds and then that way each reviewer is only reviewing.

Addie Kelzer 4:23

Great.

Marla Aronovitch 4:35

In my case, I get about 60 scholarships, so they each get 20 to review. And what I do is I take the three reviewers scores, average them, and that becomes the score for that scholarship or sympath. It just and because I can't ask reviewers to review 60, so we just break it down into smaller groups. So you have.

Amy Pancake 4:45

Yes.

Addie Kelzer 4:52

Mm.

Marla Aronovitch 4:55

Three separate scholarship review groups, but it's the same group doing the same kids, so that you're getting a score that you should be representative. They're all judging them equally.

Amy Pancake 4:57

Mhm.

Addie Kelzer 5:11

Thanks, Marla.

Karin-EWVCF 5:13

Thank you.

Addie Kelzer 5:22

Anybody else breaking out large volumes of requests into multiple review groups or otherwise? Yeah, OK, so I see some nodding heads that some others are doing it in the same fashion, Karen.

Karin-EWVCF 5:35

OK, sounds good.

Addie Kelzer 5:46

All right. Feel free to chime in further on that topic. Otherwise we can jump to a new topic. I don't see any hands up, so I'll leave it to you.

I thought for sure you all would be talkative today since many of you have scholarships and grants opening in January or opened earlier this month.

Lori, you have your hand up. Go ahead.

Lori Steinhilber 6:22

OK, so we're starting to work on our scholarships now and creating the applications as also getting our student release forms. I created my student release form yesterday in the simple form builder, so when I went to attach.

The simple the student release form to the request.

It pulled.

A student release form from 2024 that's not published.

It didn't pull the one that I had published, so I don't know if I'm skipping a step.

Or should I be attaching it to the to the opportunity first?

And then to the request.

Addie Kelzer 7:15

Lori, I'm wondering if it would be helpful to share screen to show exactly what you're coming up against. Would you be willing to do that? OK, I let me make you a presenter here.

Lori Steinhilber 7:24

Um, I can try that.

Amy Pancake 7:31

OK.

Addie Kelzer 7:33

OK, you should have availability to present at any time or share screen.

Kirsten Avey 7:45

OK.

Addie Kelzer 8:17

I'm loving that a couple of you have very festive backgrounds.

Lori Steinhilber 8:27

I'm trying to log in here, so just give me a second.

Addie Kelzer 8:31

OK, sounds good.

While you're doing that, Lori, I'm going to offer a couple of reminders. I saw in the chat a few of you are taking extended leaves. Bravo. Congratulations, you've earned it. Just a reminder though, if you are going to be out of office and you have open support cases.

Our support team is happy to keep those open as long as they get some sort of response via auto e-mail that you're out of the office and then they know, especially if it includes the dates that you'll actually be out of office, then they know when to circle back. So for anybody that's got open support cases while you go out of office. If you don't mind just setting up that auto reply, then if we reach out, we'll know

when to circle back.

On that note too, akoyaGO offices will be closed December 24th, 25th and 26th and also the expected January 1st. So you're welcome to continue to submit support cases during that time and we'll get to them when we return to the offices.

Virtually we're not, most of us are not in an office that following Monday. And then I also just wanted to call out that Lisa you did, Lisa Bates, you did a great job of calling out the scholarship user group, which we're kind of just doing a couple of pop-ups for scholarships exclusions.

Exclusively, you called it out in the forum inviting people to register. And so that is January 14th. So we'll have a special user group for scholarships, specifically scholarships in GOapply.

Lori Steinhilber 10:08

I got your ice cream.

Addie Kelzer 10:20

I will get the one of us will get the link to that event in the chat so that you can register if you haven't already.

OK, Lori, I'm seeing a double of the meeting. Are you share? You're gonna share a coy?

Lori Steinhilber 10:38

Um, I'm working on that, yeah.

Addie Kelzer 10:41

OK, sounds good.

Lori Steinhilber 10:43

Uh, let's see.

Oh.

It.

Addie Kelzer 10:57

And if you're not almost there, Lori, we might just let you give you a little space to

get logged in and set that question up. OK, perfect. Then let's go ahead and do that. Just raise your hand again, Lori, when you're ready so that I know to circle back.

Lori Steinhilber 11:03

Yeah, let me do that.

Go ahead, just move on.

OK, great. Thanks.

Addie Kelzer 11:16

OK, in the chat is the Scholarships User Group event link, so you can register there. Let's go ahead and move over to Mindy. You have a question for the group.

Mindy Eggleston 11:27

I do. I am working on the scholarship matching. My application is opening on this Monday, December 15th at 9:00 in the morning. My question is.

If I make and I don't know if I'm have the right terminology, but I have 118 scholarships in there if I make a supplemental application with the simple form builder for a specific award that.

Let's say a nursing scholarship that needs the person to upload an essay about why they want to be a nurse. That this family wants something extra. I know enough to name the upload field.

You know, nursing essay or whatever I wanna call it. However, when I test my form or my application in my documents, it just says requested scholarship.

Um, something.

And I'm wondering, and I've asked the question, but I don't think I asked it right.

Does it have to be called that or could I call it the Linda Michael Nursing Scholarship or?

Or does it not matter because I'm the only one that sees it?

Because it'll go into the review group for the, you know, I don't, I don't know. It just for me when I'm practicing, I of course did several things. So I have several little lines that say requested scholarship something.

Um.

Is there a way to name those things? I named the pages. I I don't know.

Addie Kelzer 13:20

OK, so you want.

OK, so you want there to be a standard naming convention when the files come in so that they don't all appear to be the same kind of the same name.

Mindy Eggleston 13:39

Yes, yes, that's what does.

Addie Kelzer 13:39

OK. Does anybody want to speak to how to make that happen?

Meghan Davignon 13:41

So there's.

Yeah, I was just gonna confirm there's not a way to specify the naming convention for those right now, but we do have an active product suggestion. I think that we just received maybe last week on this and we agree that should they should be easier for you to identify. But you're also right that your reviewers are only gonna see the attachments pertinent to the scholarship you assigned to them. So they.

Mindy Eggleston 13:53

OK.

OK.

Meghan Davignon 14:04

If they're reviewing for the nursing scholarship, they're only gonna see the nursing scholarship attachments based on that review group settings.

Mindy Eggleston 14:13

OK. And has anybody else launched it? I mean, I've spent a lot of time. I have 118 scholarships in there, but I'm nervous and I, you know, I don't know, I've done all the testing.

Has anybody else started it already? Like when I test it, it seems to do what I want. You know, my account manager Sarah's looked at it like both of us feel pretty good, but I'm still scared to death.

Addie Kelzer 14:30

OK.

Kelly Nelson 14:47

I can answer that question. This is Kelly here at the South Dakota Community Foundation. I have over 350 scholarships in our portal and I've had it up and running since the 1st of September.

Mindy Eggleston 14:58

OK.

Kelly Nelson 15:04

So, um, it's it's working smoothly for me right now.

Mindy Eggleston 15:10

OK. OK. All right. Thank you.

Addie Kelzer 15:15

Thanks, Kelly.

All right. Good luck with your lunch on Monday, Mindy. And kudos for doing all that testing. That's always that first recommendation is test, test, test, try to break it. So sounds like you've done that thoroughly.

All right, Carrie, go ahead.

Keri Jaynes 15:36

Thank you. I am curious what others are doing with review responses. So we have a couple of different committees that are completing those review forms and answering their questions.

And then as far as I can tell, the process I've been turning those responses into any sort of like table that can help them understand the other committee members feelings about the applications. It's very tedious and I'm wondering if I'm missing something.

So they're exporting these review responses, and each response has its own row on the spreadsheet, which makes it really challenging to work with. I'll drop a a

screenshot into the chat just as a reminder.

We're not sure. I'm hoping that I'm just missing something, but there's something else we can do.

Addie Kelzer 16:28

And Carrie.

Is the staff that's reviewing these reviewer responses?

Keri Jaynes 16:39

Yeah, yeah.

Addie Kelzer 16:41

OK.

Anybody have thoughts for Carrie here?

Rebecca Knight 16:48

I don't have, I don't have any particular thoughts. I truly just I I do it manually where I take the the final score of all of them and average that. That's how I do it. It's just in a spreadsheet, but I would like to.

Addie Kelzer 16:48

If you're doing something similar.

Rebecca Knight 17:06

Yeah, say that it would be lovely if we could get a better report for these, just so that we don't have to do them manually anymore. So I'm kind of just backing up what is being said here.

Lori Steinhilber 17:06

I'll second.

Keri Jaynes 17:18

Thank you. Yeah, thank you.

Michelle Goodthunder 17:21

We'll just add in. We also do it manually. We have this fancy spreadsheet that pulls in the questions and then concatenates all the answers. So it's like a big summary for that question. And that's what I present to my team when we're talking about whether to approve or not. But again, it's setting up the spreadsheet and it's very manual.

Keri Jaynes 17:36

Mhm.

Rebecca Knight 17:41

Yeah.

Michelle Goodthunder 17:41

And PDS.

Josh Jaeger 17:45

So we've tried to do, to the extent that we're able, lots of scoring, numerical scoring. So that way we can use the reviewer scores to build a a more summarized kind of.

Rebecca Knight 17:45

The.

Josh Jaeger 18:01

View to maybe jump out into a spreadsheet or often it's internal staff that are just looking at a view that was created based on the reviewer score. But that was also part of why we wanted to have the individual scores also map into the view that shows in the review group and GOapply.

So that folks could kind of see what the average score was next to the score that they provided for any given application.

Keri Jaynes 18:23

Yeah.

Josh Jaeger 18:28

So I'm a big fan of trying to apply scores and weights to things. It's just easier than

trying to read through a bunch of unstructured data. And I think there's often a way to, even if it's still somewhat subjective, apply scores.

To responses in ways that you just can't capture using unstructured free text entry. So that'd be my suggestion. Try to find a way to make things numerical.

Keri Jaynes 18:54

I think you made me think about the review portal itself too, and as far as I remember, there's no way to export those review responses at this time. Is that still accurate? Because it does make a nicer view showing everything.

a little bit more summarized.

Addie Kelzer 19:19

That might be a good product suggestion, Carrie. If you already like how it displays in the review, can you put that product suggestion in the forum and others can attach themselves to it, but that'll really give us something tangible to work from.

That's my other I think request on this question is what would you want it to?

Keri Jaynes 19:23

Hi.

OK.

Addie Kelzer 19:39

Do or look like and then we can.

Keri Jaynes 19:40

Mhm.

Josh Jaeger 19:41

I would upvote the heck out of that. And actually, as I'm hearing you describe that, Addie, I wonder if there's space to create something similar to what exists in GOfund right now for GOfund charts.

Michelle Goodthunder 19:43

Yeah.

Addie Kelzer 19:54

OK.

Josh Jaeger 19:54

You could mirror that and GOapply in in a way that would allow us as back end staffers to create certain charts that look at certain GOapply related tables and and kind of build our own charts to display to reviewers.

That, I don't know, show some some more specificity in a way that's more digestible than a bunch of numbers or a bunch of rows.

Addie Kelzer 20:19

Hmm. Interesting.

Meghan Davignon 20:23

Just a plug from the.

Rebecca Knight 20:23

But yeah, I I also like the way that the reviewer comments page looks. That's what I tend to go to when I'm trying to get when I'm getting the final scores. And this might be a Power Apps thing, but if if if all of the.

Like reviews were in the same order on every application. That would be great too, cause the names come up in different orders per application. So so I can't just like copy and paste them every time because they're specific to each reviewer.

Josh Jaeger 20:52

Um.

Meghan Davignon 20:59

Sorry, I just wanted to clarify to make sure I understand what you just said, Rebecca. So on the review comments screen where you can see everybody's scores and comments, the reviewers are sorted differently depending on the application. They're probably currently sorted the order which they were submitted, but I'm sure that's something that we can change. So it's alphabetical by reviewer.

Rebecca Knight 21:09

Uh, yeah.

Yeah.

That would be lovely. Thank you.

Meghan Davignon 21:17

Mm-hmm, mm-hmm.

Keri Jaynes 21:18

Mm.

Addie Kelzer 21:19

Rebecca, can you enter that in the forum so we can capture that product suggestion?

Rebecca Knight 21:24

Uh, yeah, absolutely.

Addie Kelzer 21:26

That would be awesome.

Meghan Davignon 21:26

I was also gonna request for those of you who are having trouble getting the output in a way that's meaningful or helpful for you. We love to see examples of what you want the output to look like because then we can we put it into practice and I there's a lot of different preferences, but we're trying to find as much common ground as we can and and provide options so.

Keri Jaynes 21:27

We.

Addie Kelzer 21:46

Turk.

Meghan Davignon 21:46

If you have a sample of what you want the data to look like, we love to see it.

Rebecca Knight 21:49

Yeah, absolute. OK, I can definitely do that, yeah.

Keri Jaynes 21:52

I'm happy to create a product suggestion for making the reviewer comments exportable and also what I would love to see is if it was all review responses for all like in review applications in that review group in one view.

With the request numbers and you can export it because this is really what I'm trying to do. It's like whenever I'm making these documents for committees, it's like the question is at the top and the column and then the responses flow down from there and each individual response has its own row.

But I will definitely upload a couple of examples of what our committees like to see when they're reviewing their applications, because I think this could be really helpful.

Meghan Davignon 22:44

And we do have the report which can be run from CRM for GOapply review responses. You can run that from the review group which is like the summary report. So if you have feedback on that layout and ways that that type of report could be. More useful. Again, we love to hear that, and if you have specific examples, that's even better.

Keri Jaynes 23:04

Is it possible to show us because I mean I have the review responses and I export them into a spreadsheet, but is there a report that I'm missing?

Meghan Davignon 23:16

So from the review group. So if you go into the GOapply area and then review groups and then open the review group that you are evaluating, you should see a menu called Run Report at the top bar. Depending on the width of your screen, you might need to click the ellipsis to see more options to get that run report button and there should.

Keri Jaynes 23:25

Mm-hmm.

OK.

Meghan Davignon 23:36

be at least one report option there for you.

Keri Jaynes 23:39

OK, I see three options. How do we change or edit this?

Meghan Davignon 23:45

So these reports are SQL reports, so they don't use our wizard tool. So unfortunately that means they're difficult to modify unless you're comfortable with something like Visual Studio. But this is where if you have feedback on what I like, what we could provide as a canned report that would be really useful for you. We can make those changes.

Keri Jaynes 24:07

OK. Thank you.

Addie Kelzer 24:10

Great question, Carrie. We've got three or four product suggestions that came out of that. So appreciate you guys entering those in the forum.

All right.

Rebecca Knight 24:25

Um, real quick, can you guys put like a link to the forum just in the chat? I'll bookmark it.

Addie Kelzer 24:30

Yeah, actually our lovely product team added it sooner than I ever could have hoped for. It's in your left hand navigation of akoyaGO already. If you scroll all the way to the bottom, I have heard users say though if they have never joined the forum, it will just spin because you actually.

Rebecca Knight 24:36

Oh, you.

OK, cool.

Addie Kelzer 24:50

You need to like click an invite link first, so we would have provided those to most users in the past, but happy to resend them. If anybody's getting that spinning, it's not loading.

Put your name in the chat with form next to it and we'll get an invite out to you after this call.

Rebecca Knight 25:11

Thank you. I was able to get in, so thank you.

Addie Kelzer 25:13

Yeah.

Yeah, we can't currently bridge, not in an elegant way, from GOSupport to the forum for now, so from the CRM will be the best.

Rebecca Knight 25:29

OK.

Addie Kelzer 25:30

OK. Thanks. And Lisa, Lisa put the main URL in there if you. Yeah, great. All right, Kristen.

Rebecca Knight 25:34

Yeah. Thank you.

Kristen Kohn 25:42

This is scholarship specific, but I would love some creative thinking to help me out with the problem I'm having. I'm using Automatch and I have a fund.

Tracy Russman 25:56

Realize I turned it all the way down.

Kristen Kohn 25:57

That awards three different scholarships, so the three scholarships are attached to the fund. Two of those scholarships have the exact same criteria, and additionally, students are required to submit an essay as part of those.

Scholarships. So a lot of students will qualify for both of those. I really don't want them to have to complete the essay twice when they opt in, but I am struggling to figure out how to navigate that.

And I do want to keep them as two separate scholarship awards for my own data and tracking. So I'm just curious if there's any suggestions from the group how to.

Manage students so that they are not having to duplicate their work.

Josh Jaeger 27:05

I wonder if you were to add a text area field on the request that mapped from both scholarships onto the request.

Kristen Kohn 27:18

uh Can you give me a little more? I'm not quite following yet.

Josh Jaeger 27:22

So, right. So if you so each scholarship is gonna have its own application, right? So then you could have the student in one of those scholarships.

Kristen Kohn 27:31

Mhm.

Josh Jaeger 27:39

Fill out a a text area field that would map onto the request and then that text area field would already be populated then when they went to the next scholarship to fill that field out if you mapped the same field onto the second application.

Although now that I am saying that, I'm remembering that Marni said that there's a a

default value challenge that's coming in a product update soon that right now we don't. You can't put a default value in a question.

Tracy Russman 27:55

OK.

Josh Jaeger 28:11

Field, but I think once that update were to come through that would work. But anybody's certainly free to correct me if I'm wrong. I'm sorry, my 2 year old is very excited about seeing everybody.

Kristen Kohn 28:26

That's no problem.

Addie Kelzer 28:26

She's just stretching her tech legs early on in her career.

Kristen Kohn 28:33

My current solution is I'm just in the form editor. I'm going to put a note. If you already answered this for scholarship A, you don't have to answer it again because they go to the same review group.

Addie Kelzer 28:34

Yeah.

Kristen Kohn 28:49

And they'll be all part of the.

the um application. So that's kind of my solution right now, but that feels

Yeah, okay, not great. So I just wondered if there were any other creative solutions.

Josh Jaeger 29:09

I admit to being super interested about what the use case is for having two separate scholarships for so far what I've heard described as the same exact scholarship.

Kristen Kohn 29:21

It would be because they are honoring people from their organization with the named scholarships. Um But yes, it is really just more work for me to manage them. But I will note that there's not really an easy way to, I've learned also, there's not really an easy way to combine the scholarships, especially with older data. It requires a lot of manual work, so I don't really want to try to make a case to combine them with the the fund holders. So they're separate. Just trying to figure out right now how to umm not duplicate student work. So, okay.

Addie Kelzer 30:18

Mhm.

Marla Aronovitch 30:19

Can I just say you're a lot nicer than I would ever be? I make them work for the money. It's, you know, you're getting a scholarship, you're getting the money. What does it take to copy and paste it from one application into the next? It's, you know what, work for the money. It doesn't come free. That's how my philosophy in it. It's. You know, just to think. I mean, it's copy and paste. It's really, it takes another two seconds out of their day.

Kristen Kohn 30:46

That's true, Marla, and I I I'm not against that either, although I think it just is going to it would the same reviewers will be looking at this. So it's just going to create 2 pages of the exact same essay, which I don't know it.

Marla Aronovitch 30:55

Yep.

Mindy Eggleston 30:59

Mm.

Kristen Kohn 31:01

But yeah, I agree. That could be another option. I could just simply say you can copy and paste or you can you can write a completely different essay if you want to.

Marla Aronovitch 31:10

Different essay. Yeah, yeah, yeah.

Kristen Kohn 31:13

OK, well, if anyone has a a brainstorm in the middle of the night, please reach out. I'd love to hear your idea.

Addie Kelzer 31:18

But.

But.

Hopefully none of you are thinking about akoyaGO in the middle of the night.

Thanks, Kristen.

Tracy Russman 31:30

But of course you guys are. We want you to be thinking about it all the time.

Addie Kelzer 31:36

No, we have boundaries. We try. No boundaries. Boundaries. Yeah, that's hilarious.

Tracy, you had a question for the group, didn't you? I think you're next.

Tracy Russman 31:38

Did you say bad dreams or boundaries?

Okay, thank you. Sorry I came in late. Um,

Use the simple form builder for the first time and I love the ease of it. Is anyone else using it routinely? OK, I.

I don't know how to make it map the submission date, the some of the pre-mapped fields that I like to see come across and populate automatically based on a hidden field that I've used in the advanced form builder.

But is there, is it just limited? Is that just one of the limitations of it? It can't really do that. For example, we have a drop-down list in our database of what type of grant it is, and I usually pre-fill that so that when it comes across, I know which kind of grant they're applying for.

Is there a way to do that invisibly to the applicant in Simple Form Builder?

Addie Kelzer 32:48

Can you clarify that where that custom field lives, Tracy? What table does that custom field live on?

Tracy Russman 32:55

In the request table, yeah, we call it committee, which is not really the right name, but it's been around since Pearl days, so we still keep that name and there's a drop down. And so I understand that I can remove all the other options besides the one I want in simple form.

Addie Kelzer 32:57

Oh, in the request, OK.

Mindy Eggleston 33:07

Yeah.

Tracy Russman 33:15

Form Builder and then force the applicant to just select that one and then it will map. Same with the submission date if that whatever they type in will map if I ask them to type that in manually. But is there a way to do it in Simple Form Builder where it's just pre?

You know the program field, for example, the field of interest field. These are ones that I've typically mapped in the past without the applicant even knowing it so.

Mindy Eggleston 33:40

Mm.

Addie Kelzer 33:43

All right, those of you that are using simple form builder.

Josh Jaeger 33:47

It's same Josh's challenge here with the and it's. I think it boils down to the default value. Again, there's ways to get at the submission date depending on what you're trying to accomplish with it. But as it relates to having sort of pre-populated values in

there until default values are made possible, we're kind of stuck.
Which is really the only thing that's kind of stopping me from moving forward with Simple Form Builder at this time.

Tracy Russman 34:11

Mhm.

Meghan Davignon 34:13

Right now that that default value feature should be restored in the January release. So that's like the 22nd I think of January.

Tracy Russman 34:13

Yeah, I didn't know that until I was. Go ahead, please.

So what is that going to do?

Meghan Davignon 34:26

So you'll be able to set a default value for like your choice fields, and then you can hide that field from your users if you don't even want them to see it.

Tracy Russman 34:29

Ace.

Yay. OK. All right, cool. Thank you. I just wondered if I was missing something. I even have a case then about this, so I can cancel that now because I just wasn't sure.

Good.

Josh Jaeger 34:35

Right.

Addie Kelzer 34:40

Uh.

Meghan Davignon 34:40

And then Tracy, for this the submission date, you shouldn't have to map that. That should auto populate.

Tracy Russman 34:45

Yeah, I don't know why it's not populating.

Meghan Davignon 34:48

I'm maybe you have a custom version of that field. I would be curious about that because there's a few fields which auto populate no matter what you do. So that would be worth a support case because I would expect that to be filling.

Tracy Russman 34:58

OK. Just to see where it's going then maybe we've hidden that field. That seems weird, but maybe, maybe that's it. All right, I'll keep my case. Thank you.

Meghan Davignon 35:02

Mhm, mhm.

Josh Jaeger 35:09

Tracy, where? Where do you use the submission date? Like what? What are you? Where are you needing to see it?

Tracy Russman 35:15

It's it's on the process tab, the process of the grant application received or letter of intent received, interim report dates, you know, those kind of things.

Josh Jaeger 35:25

Interesting. I would argue that the request created on date would be the same as the submission date for requests that are created by by GOapply. So there's that but the for things like the interim.

Tracy Russman 35:33

True. Good point. Yep.

Josh Jaeger 35:41

Submission dates the If you look in the GOapply tab, I would expect the submission

date to show up in those GOapply subgrids as well for each of those report phases or those phases.

Tracy Russman 35:52

Well, you know, that would make sense, Josh. Where were you when I was building all these last week? Come on, I didn't even.

Meghan Davignon 35:55

For, yeah, for.

For request type application, the request received date should be populating and then for your interim and final reports there's a requirement received date on the requirement record. But yeah, also the GOapply submission dates and the GOapply grid should show you that as well.

Tracy Russman 36:15

I knew it was a simple answer. I knew it was easy. I just didn't. I couldn't find it. Thank you.

Addie Kelzer 36:22

That's great. That's why we all come together.

All right. So Tracy, what's our last one in line? Lori, I want to give you an opportunity to circle back to your question. If you wanted to share, you still have the ability to share screen.

Meghan Davignon 36:31

8.

Addie Kelzer 36:53

Other rule. OK, perfect. OK, tee up your question again for us, Lori.

You might be on mute.

Lori Steinhilber 37:05

OK, so this is my opportunity. Then I go into my phases and I have my 2025 student release form.

So when I want to attach that student release form to a request.

Do and then I go into the request itself to the opportunity.
And attach it to the opportunity or do I go into the request that I want it to attach to?

Josh Jaeger 37:42

Is this an auto match?

Mindy Eggleston 37:43

OK.

Lori Steinhilber 37:45

No, this is in simple form builder.

Josh Jaeger 37:48

So I would, I would expect to see that when they submit that student release form, first of all your phase orders are the same, so that could create some challenges there. But once you fix that, I would expect that once they submit. The student release form phase that that would show up as a PDF in your Documents tab on the request.

Lori Steinhilber 38:11

That's what I would like to have happen, but how do I get it to the request?

Josh Jaeger 38:16

This should just happen, but.

Meghan Davignon 38:16

Looks like right now your phase. Both of these phases are on the same opportunity which is called Student Release Farm. You need this to be a phase on the opportunity that this should be associated with.

Lori Steinhilber 38:27

OK, so I should go into the opportunity that I want it to be associated with and attach this phase.

Meghan Davignon 38:34

Yeah. And actually what I would probably do is figure out what the opportunity number is for that and then go into the phase and change the opportunity from there. I think you'll have to do it from the phase rather than doing it from the opportunity.

Lori Steinhilber 38:48

OK.

I'll try that.

And then the other question that we had was when we're creating the simple in the simple form builder.

We were having a problem adding the transcript.

See if I can pull one of those up.

So should we still add the transcript from this screen?

Meghan Davignon 39:52

Yes, yes, you need to define your transcript form 1st and then you can attach it to your application.

Lori Steinhilber 40:01

OK.

And do we still need to add it in the form editor, then, if it's added there, OK.

OK.

OK. And I think we might have other questions.

Addie Kelzer 40:28

5.

Lori Steinhilber 40:29

If anybody has like 15 minutes after this meeting that they can give us.

Addie Kelzer 40:37

I'll let anybody self volunteer if they do in the chat, Lori.

Lori Steinhilber 40:42

OK, great. Thanks.

Addie Kelzer 40:43

Um, but good. Thank you for sharing screen. That helps immensely to visualize.

Lori Steinhilber 40:49

Thank you.

Addie Kelzer 40:50

Yeah, absolutely.

OK. And then I'm just going to take over your screen share briefly.

To get us back to the room. All right, Tracy, you have another question for the group.

Tracy Russman 41:08

It was really just when she said that about the transcript, it made me wonder. Or maybe it was the form that one of the phases. Anyway, is there any problem or any danger in?

Downloading the Jason file from one application and just plunking it in as the Jason file of a new new opportunity or a new form and then tweaking it from there. As long as I'm saying within simple or advanced, I can't do it across I know, but is there any danger in doing that because I've done that quite a lot.

Meghan Davignon 41:42

No, you can certainly download a Jason file from one and upload it to a new form. If it was advanced, it's going to open as advanced. You can't make it go back to simple, so there's no if you can't mess that up, it's going to know what the source was.

Tracy Russman 41:44

K.

OK.

Yes, correct. OK.

Yeah, OK.

Meghan Davignon 41:57

But that's totally fine. What we don't support is manually manipulating the Jason file, so we just wanna make sure copy from one to the other, but.

Tracy Russman 41:59

All right.

Oh, yeah. No, no, no, no.

And then is there?

Can we still um?

You know up update the form definition or is that very naughty?

Meghan Davignon 42:20

I mean, sometimes it is required, right? There's just certain situations where it it must be done. We just try to do it as little as possible because there's in many situations a risk of data loss, right? So if you have a field that you need to remove because it was added as the wrong format or something.

Tracy Russman 42:33

Mhm.

Meghan Davignon 42:37

Users who have input data into that field will lose that data, and we don't want that.

Tracy Russman 42:43

OK. All right. But I just launched a couple days ago. There's only a couple in draft and I need to add the thing I just talked about, which is how to get the the, the committee to come across. So I was hoping I could still do that, but it's not that important. I'll just.

I'll proceed with caution. Thank you.

Meghan Davignon 43:02

If we really like, if you really weren't allowed to do it, we wouldn't have told you how to. We understand it's necessary in some cases.

Tracy Russman 43:07

Yeah. Yeah. OK. All right. So it's the same process. You just select the ones that are in draft and then update the form definition on those alone. OK.

Meghan Davignon 43:18

Right. And that is documented now in our good GOsupport.

43:18

Mhm.

Tracy Russman 43:19

OK, great. Thank you. OK, thank you.

Addie Kelzer 43:23

OK, great. I think you're still on the nice list, Tracy.

Tracy Russman 43:28

And naughty should definitely be one. It's a definition that we need to add to the the user manuals.

Addie Kelzer 43:33

All right, Erin, you have a question.

Trisler, Erin 43:41

Yes, thank you. So piggybacking on the Jason file. So there is a section and it's a panel for contact updates that I would like to go into one that I know is working and take only that section of the Jason coding.

And then paste it in to replace the other and I know where to start and where to stop it. Is there any caution or any sort of, you know, but doesn't work well or could that work based on what you know?

Meghan Davignon 44:18

OK. Truly, if you do it perfectly, yeah, it will work. It's just a very high risk thing to do. So we technically say don't do it right. Because if if you do a copy paste and you miss

even one character, you might have a form that's inoperable and then it's billable for us to try.

Trisler, Erin 44:24

OK.

Yeah.

Meghan Davignon 44:38

Try to troubleshoot it for you so we don't, and it's so tedious. We just don't want you to have to do that. So just take a backup before you do it to make sure that if you need to restore back to a version that's working, you have it available.

Trisler, Erin 44:52

OK. So then what would be your best practice for? There's a function that's just not working in all of our report phases and we have probably 20 report phases.

So I need to get one of them perfect and then apply that to all the rest. And to do it, you know, each at a time is really tedious and time sensitive. So I'm just trying to find a workaround that could help. Do you have another idea or?

Meghan Davignon 45:22

Yeah, yeah. There's not really any other option besides doing it in the form builder. Those are really the only two ways to do it. And I understand the tedium of having to redo that in the form builder. Just the form builder contains the guardrails that make sure everything remains operational. So that's our best practice, but understand the situation that you're in.

Trisler, Erin 45:31

Yeah.

OK.

OK.

Okay, yeah, thank you.

Addie Kelzer 45:51

Oh, great, Tracy. Go ahead.

Tracy Russman 45:54

Surprise the transcript form, which is like a little sub form builder within the simple form builder. Can that be used for other things like a budget for a regular grant for example? Or is it just for transcripts?

I haven't looked at it. Like I said, I just started using simple, so just.

Josh Jaeger 46:21

Is there any reason why you couldn't, uh, have them upload a file?

Tracy Russman 46:25

Yeah, that's what we do. But we we like them to upload our file. Like so we say please download our, you know, budget template and then re-upload it and then in the following field. So I just wondered if there's a way to build it right in the thing. I I didn't know that was a thing, so just curious.

Josh Jaeger 46:26

Oh, something like a.

Tracy Russman 46:44

Anyone?

Meghan Davignon 46:44

From a technical, from a technical perspective, no, there's nothing to prevent you from doing that. Although on the back end it is labeled transcript like there's some areas where that is hard coded that you can't change it.

Michelle Goodthunder 46:44

On that.

Tracy Russman 46:51

Mhm.

OK.

Josh Jaeger 46:57

Be interesting to see akoyaGO make that more agnostic.

Tracy Russman 46:57

Is there any other way anybody else doing that where you want them to fill out a specific form? But I don't want to just build field and field and field and field because that will not map and it won't come across as a document. So is there any other suggestions for how to handle that?

Like a project worksheet, budget worksheet. So we're saying tell us about your project, how much is it going to cost and how much is coming from this grant versus another grant, etcetera. Anybody using something like that?

Josh Jaeger 47:29

I like what GOapply does for reviewers in that vein, where if you wanted reviewers to have access to certain documents across the board, they can click on and download that stuff. Be cool to see that functionality available at the.

Tracy Russman 47:33

Mhm.

Mm.

Josh Jaeger 47:44

Opportunity level for the I guess it'd be the application that that the phase level maybe.

Meghan Davignon 47:51

Yeah, right now our best practice is to include a hyperlink to a document that's stored on a server you manage or in your cloud.

Marla Aronovitch 47:52

I put.

Tracy Russman 47:58

Yeah, that's what we do. OK, so we're doing the best practice. I'm not naughty. Yay.

Marla Aronovitch 48:01

But I put the.

Josh Jaeger 48:05

One thing that we're considering doing to get around that because we also offer templates for budgets and for outcomes post award is we're gonna we're storing the template in a certain area in our SharePoint Server and then triggering an e-mail upon approval.

Marla Aronovitch 48:06

I.

Yeah.

Josh Jaeger 48:23

Uh, that goes out and has those templates as attachments.

Tracy Russman 48:30

Like an afterward, like afterward thing.

Josh Jaeger 48:32

Yep.

But again, that's that's post application, right? Post award. So still not a solution for what you're saying.

Marla Aronovitch 48:35

Josie.

Michelle Goodthunder 48:42

Those emails are getting flagged by security for having attachments like that.

Marla Aronovitch 48:43

But I put it in.

Josh Jaeger 48:48

Have not actually gotten one out the door yet, so I will let you know. I'm also an admin on our Microsoft tenant, so I have ways around that, but it's still I think an important question worth answering.

Michelle Goodthunder 48:51

I'd be curious.

Tracy Russman 48:54

Mm.

Addie Kelzer 49:06

Marla, you had something to add?

Marla Aronovitch 49:08

Sure. I was, I'll add to this, but I had a question because I just put the template for the project budget within within the grant application and I have all the subsections right government grants and they can add a row in that and they all add up in the end and at the very bottom it has the balance has to be 0 so.

They have to balance up their budget, but it's all in the application.

And same with the expenses.

Tracy Russman 49:33

Where do those fields? So sorry, do you have CRM fields to to match that then or like so you have item one is OK?

Marla Aronovitch 49:40

Yes, yeah, they do. They do. The program expenses map and that, yeah.

Tracy Russman 49:45

So it it it met.

Marla Aronovitch 49:46

But don't ask me cause I'm not the expert at it, but that's how we do it. But if I'm gonna go to my second question, but my my question is this, does anybody have issues with the when they ask for recommendations from students on scholarships?

Of the e-mail of the recommendations not coming back because the e-mail somehow aren't getting to the recommenders and I I came I I had quite a well a few last year that didn't come through, but even ones where.

We knew that the the e-mail address was correct. The school checked the firewall because it was a professor and it wasn't being blocked by their firewall or anything, but the e-mail was just not going through for the professor to do a reference and I'm wondering.

Saying, you know, in that case, do we put in a case for support? Like, like why they're not? They've checked their junk mail, they've checked everything.

But they're just not going through.

Karin-EWVCF 50:45

I mean, we're still in testing and we've had that problem.

Marla Aronovitch 50:49

Oh.

Karin-EWVCF 50:50

A lot.

Addie Kelzer 50:56

Has anybody else come across this or brought this up to our support team and received a resolution?

To answer one of your questions, Marla absolutely can be a GOSupport case, because if it is an issue, we'll want to identify what the problem is and push out a correction.

Josh Jaeger 51:09

I love you.

So.

Marla Aronovitch 51:12

OK.

Josh Jaeger 51:16

OK.

Yeah, and I think some.

Meghan Davignon 51:20

Generally speaking, when your emails are being delivered to some recipients and not others, the problem is going to be on the receiving e-mail server end. So something about our message is triggering a spam filter that doesn't put it, even put it to the user's junk box, right? It's being quarantined.

I have seen this is more common with educational institutions like high schools. So that is most likely the answer that we're going to come up with if you tell me that you're that it's being received by some parties but not others, because then it's not, you know, the issue's not on the sending side.

We can obviously review the content of the message and see if there's any recommendations we can make for general spam filtering, but you might have to reach out to the educational institution and say please whitelist our domain.

Marla Aronovitch 52:05

Yeah.

Addie Kelzer 52:06

Mm.

Marla Aronovitch 52:09

Yes.

Addie Kelzer 52:13

Great. Thanks, Marla. Tracy, did we get you something helpful? OK, great.

All right, Lisa.

Lisa Bates 52:25

OK, totally different topic. I know when we have grant writers that don't want to use different emails, we can tell them to add the plus one or whatever to the end of their e-mail address.

So I have this guy that applied and he applied under the wrong organization and so we got that figured out how to fix the status tracking and the request.

But then I pulled him up and he has five different. GOapply user accounts, two of them for the same organization. And he says, Oh yes, several of those emails are inactive. And the best route is to make all of them with this one primary contact. And if necessary, here's a secondary and I'm just. I don't know the best way to. Fix this. If I just deactivate them and tell them if he wants to apply for them, he needs to request a new account and do it with the plus. In his e-mail and I think for him that's going to be very confusing. Is there a way for me to manually do it for him? Or what's the best suggestion? I'm open to ideas.

Meghan Davignon 53:56

You mean manually set up the user accounts?

Lisa Bates 53:58

Yeah.

Meghan Davignon 54:00

You could use the add GOapply user function.

He'll still need to set the passwords on those, but it will establish the accounts with the appropriate parent constituents.

Lisa Bates 54:13

OK.

That might be the easiest way.

Meghan Davignon 54:18

OK.

Josh Jaeger 54:18

We've run into similar issues with having not, not even just having grant writers that have multiple organizations for whom they're submitting grants, but also having technical challenges. And at some level, we've decided that the onus has to be on the grant writer to be able to use the.

The tools that are available to that person to write grants. That's just the way things work. And certainly, you know, I've I've applied for grants to the federal government through Smartsimple before, and it's not simple. We used to call it.

Lisa Bates 54:42

Yeah.

Josh Jaeger 54:53

What did we used to call it? It was like dumb, hard or something. But you know, if I if I couldn't submit that grant through Smartsimple, then we just didn't get the grant. And it was a, you know, half \$1,000,000 grant that managed the whole program for homeless veterans. So that wasn't an option and we just had to figure it out.

Lisa Bates 55:12

Yeah, this came in as Chanticleer String Quartet and it was for a food bank asking for money to buy food. I was like, hmm.

Josh Jaeger 55:23

We actually had one grant writer who logged in as the wrong organization. Excuse me, I'm busy, thank you. Signed up as the wrong organization and then changed the name and all of the information for the constituent record. Yeah. So when change requests became a thing, we were very thankful to akoyaGO. For doing that 'cause that took a lot of undoing and redoing.

Addie Kelzer 55:44

Mm.

Lisa Bates 55:50

I think I'll go that route, Meghan. Thank you.

Addie Kelzer 55:55

Lisa, I did put in that possibly you already have this resource, but it's just goes over plus addressing in case it would be helpful for any of you to share directly with a grant writer so that you don't have to explain how that works.

Um, they can gain access to this because it's not required to be signed into the support to be.

Meghan Davignon 56:16

This may seem really obvious, but I just want to state it because I do this when I'm testing in your environments. You know I'm Meghan at akoyaGO, but when I set up a user account, you know in Wayne County Foundation, it's Meghan plus WCF. Like I don't just pick a random digit, I try to make it identifiable so I know which organization to use that login for.

Addie Kelzer 56:38

Good. All right. We have very limited time left. Karen, you're next in line and you might wrap us up for the day.

Karin-EWVCF 56:49

Just a question I had for our it's kind of winds back to the emails because we've had it with the where it hasn't appeared even in quarantine. Where is it going? That's that's the only problem.

Meghan Davignon 57:11

Yeah. So if you can see it in your outbox, because when we send from Dynamics, we're actually sending from Exchange and that means it's successfully being sent. So there is some purgatory on the receiver side and depending on the e-mail provider that looks different. So you know if they're using like an SMTP or they're using Exchange Online, it it can vary so.

The IT manager of that receiving domain is gonna have the best resources to help you in that case.

Karin-EWVCF 57:39

Would you suggest that we put something maybe just saying please?

You know, make sure that we're, you know, a friendly receiver or something like that.

Meghan Davignon 57:49

It can't hurt like the more that you draw attention to it, the better your odds are of being received.

Karin-EWVCF 57:51

OK.

OK.

OK, perfect. Thank you.

Josh Jaeger 57:56

Send an e-mail that says please accept our e-mail.

Meghan Davignon 57:57

Put it on your registration page and every other page.

Karin-EWVCF 58:04

Okay. All right. Thank you.

Addie Kelzer 58:08

So I know we probably have at least one question that was unanswered that we didn't have time to get to today. So I just put in the chat the link to the category in community forum that is specific to this user group. So Mindy, feel free to drop your question in there or if there are others that would like to continue the conversation between now and February.

We'll go ahead and wrap up today. Our next round of user groups will start in February, but to recap, January 14th will be our scholarship specific user group, so please register for that.

January 22nd is our next product update that will again be mostly bug fixes and then our next release that will be full of enhancements will come in March. The full list of our projected release schedule is also available on Community Forum.

You won't see any akoyaGO staff working December 24th through the 26th. Please set up your out of offices if you are going to be out and you have open support cases that we're trying to e-mail you about. And then lastly, just a reminder if you haven't already seen it in your.

Inbox that we sent out our end of year survey. This is critical for us to get feedback on a variety of different things, including user groups. And so if you could take the time over the next couple weeks to fill out that survey, we would appreciate it a lot. There's a lot of really wonderful people in the room and I just want to thank you all

for your participation.

Participation all year long in user groups. You guys are really glue players around here, keeping the akoyaGO community alive and fresh all year long. So just to really appreciate you being here and helping each other. We'll catch you all in February.

Have a happy New Year.