

# Fluxx Grantmaking - General Overview

## Child Articles Underneath This Parent Article

- [\(WPP Staff Only\) Fluxx Training Video Recordings](#)
- [IMPORTANT: Fluxx Considerations](#)
- [Contacts in Fluxx](#)
- [Fields, Field Types, and Field Modification](#)
- [Fluxx Applications](#)
- [Fluxx Data Structure Simplified](#)
- [Fluxx Funded Projects Page Report](#)
- [Fluxx Grantee Portal](#)
  - [How to Check Requirements in Fluxx](#)
  - [How to Submit a Requirement in Fluxx](#)
- [Fluxx Helpful Links](#)
- [Fluxx Merging Duplicate Records](#)
- [Fluxx Progress Report Review](#)
  - [Fluxx Progress Report Review Workflow and Build \(prior to August/September 2023\)](#)
- [Fluxx Production and Pre-Production Environment](#)
- [Fluxx External Reviewer Assignment](#)
- [Fluxx Reviewer Portal](#)
  - [How to Check and Submit Reviews Assigned to You in Fluxx](#)
- [Fluxx Search Functionality](#)
- [Generic and Custom Fields](#)
- [How to Get Support and Frequently Asked Questions](#)
- [New Users, Organizations, and Registrations in Fluxx](#)
  - [Roles, Programs, and Profiles \(or Portals\) Definitions](#)
- [The Admin Panel](#)
  - [Cache Menu of the Admin Panel](#)
  - [Card Documents Menu of the Admin Panel](#)
  - [Card Settings Menu of the Admin Panel](#)
  - [Data Management Menu of the Admin Panel](#)
  - [Finance Menu of the Admin Panel](#)
  - [Forms Menu of the Fluxx Admin Panel](#)
  - [Global Settings Menu of the Admin Panel](#)
  - [Migrations Menu of the Admin Panel](#)
  - [Plug Ins Menu of the Admin Panel](#)
  - [Programs Tab of the Admin Menu](#)
  - [Queue Menu of the Admin Panel](#)
  - [User Settings Menu of the Admin Panel](#)
  - [Workflow Menu of the Admin Panel](#)
- [DocuSign Integration with Fluxx](#)
- [Fluxx Comm Team Workflow](#)
- [Fluxx Grant Amendments](#)

## Table of Contents

- [1 Overview](#)
  - [1.1 Website URL](#)
  - [1.2 Record Types](#)
    - [1.2.1 Organization Records](#)
    - [1.2.2 Request/Grant Records](#)
    - [1.2.3 People Records](#)
    - [1.2.4 Review Records](#)
    - [1.2.5 Requirement Records](#)
  - [1.3 Cards](#)
    - [1.3.1 Finding Linked Records On a Card](#)
  - [1.4 Forms](#)
  - [1.5 Reporting](#)
  - [1.6 Searching](#)
  - [1.7 Correspondence with Grantee in Fluxx](#)
    - [1.7.1 Saving Correspondence From Outside the System to Fluxx](#)
    - [1.7.2 Emailing a Grantee From Within Fluxx](#)
    - [1.7.3 Letters](#)
  - [1.8 Record Locking](#)
    - [1.8.1 What It Looks Like in Fluxx](#)

## Overview

Fluxx Grantmaking is a software designed to manage the grants workflow from end to end, much like the predecessor system we used, Blackbaud Grantmaking.

Some concepts to note are included in this page.

**Before you begin:** Please make sure to refer to the [Employee Reference Guide](#) as well.

## Website URL

The main landing (home) page for WPP's Fluxx instance is: [https://wpp.fluxx.io/user\\_sessions/new](https://wpp.fluxx.io/user_sessions/new)

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## Record Types

To organize data properly, the data is managed with several unique record types.

All of these record types can be displayed in various ways using Cards – more on that in the [Cards](#) section, below.

The main record types that the WPP uses are:

### Organization Records

These records store data on the organization that submitted the request (or, in PERC's case, shows data relating to the Principal Investigator of the project). In OAC's case, they also store the **Tax ID** of the organization in question.

### Request/Grant Records

These records store all of the data related to grant applications, and subsequently grants if the application is approved. Request/Grant records are **the** central record from which all other records in the system link in one way or another.

### People Records

These records store information regarding the person or user who is signing into Fluxx. These records store the email addresses, titles, and login information (i.e. password) of the users in question.

### Review Records

These records store the scores, comments, and other information relating to the reviews that a reviewer has been assigned.

### Requirement Records

These records store information relating to regularly scheduled requirements (such as Financial Status Reports, OAC and PERC Progress Reports, etc.) that are assigned to specific Grants and Grantees.

## Cards

Within Fluxx, a **Card** is the visual display of a single record type or of a subset of records within a single record type.

For example: the **People Card**, when not filtered, will display EVERY person/user record in the database, including staff members, reviewers, grantees, and various other contacts.

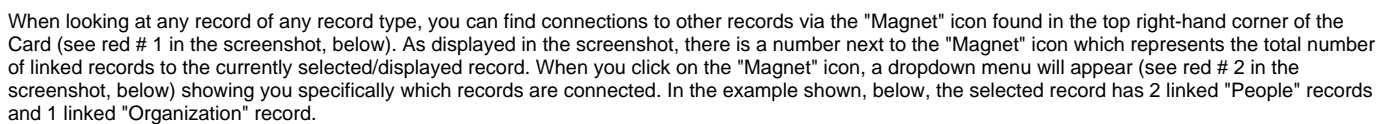
Not all cards display all records of a specific record type, however. As another example: the **Requests and Grants Card** stores ALL records for applications – ranging from those applications that were actually granted and are now closed grants to the applications we received and declined for one reason or another. The **Requests Card** also shows data from the "Request and Grants" record type; however, it will ONLY show you applications that were NOT granted, either because the application cycle is still in an early phase or because the application was declined.

**Cards** are also the individual "components" that form together to make a complete dashboard. For example, "3. Requirements Dashboard" contains a several different cards filtered to show Requirements moving through the workflow. The first Card, called "New" displays Requirements in that status of "New," i.e. they have been published and are waiting to be submitted by the grantee. After that, there's a Card called "Finance Review," showing all Requirements that are waiting for a review from the Finance Team, and so on.

A view of **ALL** of the various Cards available in the system:

GRANTS MANAGEMENT	BUDGETING	CONTACT MANAGEMENT	REPORTS	ADDITIONAL CARDS
Submitted Registrations Completed Registrations <a href="#">+ Requests And Grants</a> <a href="#">Denied &amp; Withdrawn</a> <a href="#">+ Requests</a> Grants Requirements Payments Amendments Reviews	<a href="#">+ Funding Sources</a> <a href="#">+ Funds</a> <a href="#">+ Subfunds</a>	<a href="#">+ People</a> <a href="#">+ Organizations</a> Documents Emails	<a href="#">+ AdHoc Reports</a> <a href="#">+ Excel Reports</a>	<a href="#">+ Grant Data Archive</a> <a href="#">Grant Request</a>
			SHARED CARDS	GENERIC TEMPLATES
			-- Select Card -- ▾	-- Select Template -- ▾

There is a relationship between the records types listed above. Please see the diagram below which outlines exactly how every data type connects to every other type within the Fluxx database (as you can see, the Request/Grant is at the center of all connections):



**FLUXX** Default ▾

**REQUESTS AND GRANTS**

Search

**Testing**

ID: [REDACTED]  
Program Lead: [REDACTED]  
Amount Requested: [REDACTED]  
Status: Eligibility Review

Status: Eligibility Review

Table of Contents

- Organization Information
- Key Grant Information
- Preliminary Application (Stage 1 of 2)
- Confirmations
- Internal

Organization Information

- Organization: [REDACTED]
- Primary Contact: [REDACTED]
- Primary Signatory: [REDACTED]
- Project Staff 1: [REDACTED]
- Project Staff 2: [REDACTED]
- Project Staff 3: [REDACTED]

Key Grant Information

Creation Date: October 7, 2021

Blackbaud Grant Type:

Amendments

People 2

Orgs 1

Payments

Requirements

Reviews

Funding Sources

Meetings and Site Visits

1 - 25 of 632

Edit

Workflow

If you would like to see specific details about the connected records, you need to click on the name of the record type itself (I.e. click on "People" to see the People records connected to this record).

FLUXX Default

### REQUESTS AND GRANTS

Search

**Testing**  
ID: [redacted]  
Program Lead: [redacted]  
Amount Requested: [redacted]  
Status: Eligibility Review

**Status** Eligibility Review

▼ Table of Contents

- Organization Information
- Key Grant Information
- Preliminary Application (Stage 1 of 2)
- Confirmations
- Internal

▼ Organization Information

Organization:	[redacted]
Primary Contact:	[redacted]
Primary Signatory:	[redacted]
Project Staff 1:	[redacted]
Project Staff 2:	[redacted]
Project Staff 3:	[redacted]

▼ Key Grant Information

Creation Date: October 7, 2021

Blackbaud Grant Type:

People 2

**Linked Person # 1 Name**

[redacted]

User can login: Yes

**Linked Person # 2 Name**

[redacted]

User can login: Yes

1 - 25 of 632

Edit

Workflow

From here, it's easy to jump to the connected records. If you'd like to open Linked Person # 1, for example, you would just need to click on their name from the dropdown menu. Doing so will open up another card to the right of your currently selected one (so, in this example a People Card would pop up to the right of the "Requests and Grants" Card). Please see the screenshot below to see how that People Card will appear.

**FLUXX** Default

**REQUESTS AND GRANTS**

Search

**Testing**  
ID: 123456789  
WISER ID: 123456789  
Program Lead: [Name]  
Status: Eligibility Review

**Status** Eligibility Review

**Table of Contents**  
Organization Information  
Key Grant Information  
Preliminary Application (Stage 1 of 2)  
Confirmations  
Internal

**Organization Information**  
Organization: [Name]  
Primary Contact: [Name]  
Primary Signatory: [Name]  
Project Staff 1: [Name]  
Project Staff 2: [Name]  
Project Staff 3: [Name]

**Key Grant Information**  
Creation Date: October 7, 2021  
Blackbaud Grant Type: [Type]

**People** 2  
Linked Person # 1 Name  
Linked Person # 2 Name  
User can login: Yes

**Linked Person # 1 Name**  
Title: TEST  
Email: [Email]  
Phone: [Phone]

**Contact Information**  
Prefix (i.e. Mr., Dr., etc.): [Prefix]  
First Name: [First Name]  
Middle Initial: [Middle Initial]  
Last Name: [Last Name]  
Suffix: [Suffix]  
Alias (or AKA): [Alias]  
Title: [Title]  
Email: [Email]  
Work Phone: [Work Phone]  
Work Phone Extension: [Work Phone Extension]  
Work Fax: [Work Fax]  
Track: [Track]  
UW Department: [UW Department]  
SMPH Division: [SMPH Division]  
Primary Affiliation: [Primary Affiliation]  
Biographical Statement: [Biographical Statement]

**INTERNAL**

1 - 25 of 632

2 Workflow

Clicking on the linked Person record will pull up a People Card with that user's information.

## Forms

While **Cards** hold the data are the individual "components" that form dashboards, **Forms** are what determine **how** the data is displayed. For example, by editing a **Form** you could move the a field, say "Project Title," on a Request/Grant down below the field "Amount Requested." Please see the screenshot, below, for an example of this. **Forms** determine how essentially *everything* in the system looks from Applications and Requirements to Users and Organizations.

**FLUXX** Data boxed in Red is based off of the Form's build in the background. All of this is customizable Default ▾

## REQUESTS AND GRANTS

Search

**Request: Basic**  
ID: 0000000000  
Program Lead: Tonya Robinson  
Amount Requested: \$1.00  
Status: Eligibility Review  
**PERC**

**Request: Advanced**  
ID: 0000000000  
Program Lead: Tonya Robinson  
Amount Requested: \$1.00  
Status: Eligibility Review  
**PERC**

**Request: Advanced**  
ID: 0000000000  
Program Lead: Tonya Robinson  
Amount Requested: \$1.00  
Status: Eligibility Review  
**PERC**

**Request: Advanced**  
ID: 0000000000  
Program Lead: Tonya Robinson  
Amount Requested: \$1.00  
Status: Eligibility Review  
**PERC**

**Request: Advanced**  
ID: 0000000000  
Program Lead: Tonya Robinson  
Amount Requested: \$1.00  
Status: Eligibility Review  
**PERC**

**Preliminary Application (Stage 1 of 2)**

**Documentation and Helpful Hints**

Before you begin please review the Request for Applications and the Grantee Reference Guide, both found linked below.

[Request for Applications](#)

[Grantee Reference Guide](#)

**Project Title:**  
Testing

**Amount Requested:** \$1.00

**Anticipated Start Date:** 1/1/2021

**Duration (in months):** 12

**Primary Topic:** Other

**If Other, please explain:** Testing

**Research/Education Classification:** Applied/Basic Health Research

Please list collaborators in the following format:  
Last Name, First Name, Degree, Title, Organization

**Project Collaborators:**  
Request: Basic, Test, Subject, Research, Partnership Program

**Confirmations**

Please check this box if this application is a resubmission of a previous application: Yes

1 - 25 of 632 [Edit](#) [Workflow](#)

All **Forms** are edited via the [Admin Panel](#). Please see the dedicated [Admin Panel](#) page for detailed information on how to edit forms.

## Reporting

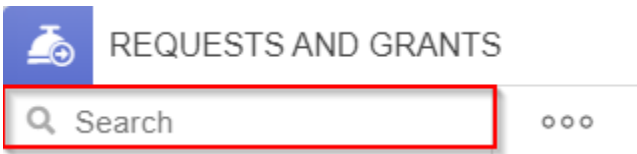
Within Fluxx, there are many different ways to report on data that you need to view. The first, and main way, we report is simply by using our dashboards. The WPP has set up several dashboard templates that are pre-filtered to show groups of records that are important for us (e.g. the Requirements dashboard displays the Grantee Requirements that we need to track). Each **Card** can also be exported to Excel if so required.

Beyond standard dashboards and cards, there are two other types of reports that can be used: **Ad-Hoc Reports** and **Excel Reports**. Please see the dedicated Advanced Reporting page for detailed information on these two types of reports.

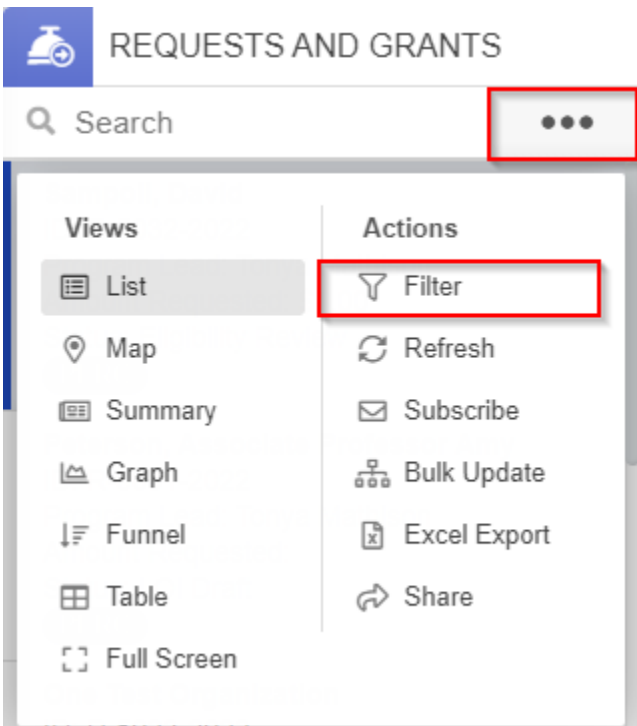
## Searching

There are three different search types:

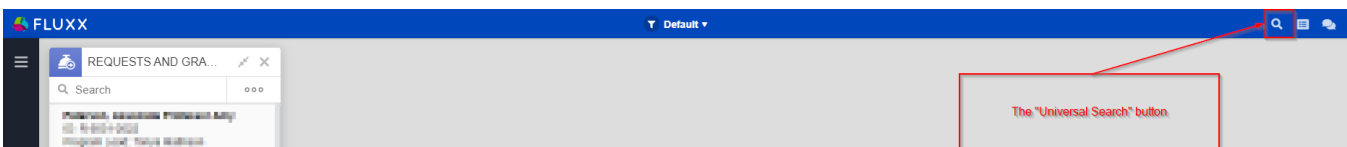
**Card Search** – From within the card itself, you can type in the "Search" bar to find specific records. This is a "brute force" way of searching as it will try to find exact matches and can't be used for specific field criteria (e.g. via this method I cannot search for Grants whose Grant Amount is greater than \$XXXX). Instead, you can type in things such as the 4 digit Grant Reference Number (or grantee organization name) in order to find records associated with a specific Grant.



**Card Filter** – Also found within the card itself, this is the precision method for searching records. From within the filter menu (found by clicking on the "Three Dot Menu" from within the card and then clicking the action "Filter"), you can search on **any field within the system** to find records that match the specific criteria you enter. For example, within filters you could find Grants whose Grant Amount is greater than \$XXXX and where the Primary Topic is Cancer.



**Universal Search** – Allows you to search *every record in the system at once* for key words/IDs, names, etc. Very powerful for certain queries, but don't rely upon it for more complex searches/to find records based off a certain criteria (i.e. something that can't be done easily in Universal Search is finding all grants whose grant amount is greater than \$100,000).



Once Universal Search is open, you can type terms or numbers into the search bar to search all records that might meet that criteria. For example: I know I have a test application with request # 5014. I type that number into the Universal Search, and I find the Request and any Requirements, Payments, Contacts, etc. that have that ID or that are connected to that request ID.

**Note:** Not all records that are returned are necessarily related to the Request I'm trying to look for. As you can see from my screenshot, below, the Requirement that is returned is NOT related to the Llama Rescue Inc. testing grant application, but was returned by the Universal Search because its ID (requirement ID) is also 5014.



🔍 5014

Search terms go here. Best to use: Rerence ID, Grantee Name, Project Title

Requests And... (1 of 1)

**Llama Rescue Inc.**  
 ID: R-5014-2022  
 Program Lead:  
 Amount Requested:    
 Status: LOI Draft  
PERC

Requests (1 of 1)

**Llama Rescue Inc.**  
 ID: R-5014-2022  
 Program Lead:  
 Amount Requested:    
 Status: LOI Draft  
PERC

Requirements (1 of 1)

**Llama Rescue Inc.**  
 Grant ID:    
 Due: April 16, 2021 | Type: External Document  
 Report ID: 5014  
Status: Approved  
*Gifts Activity*

**Llama Rescue Inc.**  
 Save just my favourite llamas.

---

ID: R-5014-2022  
 WISER ID:  
 Program Lead: Status: LOI Draft

Status LOI Draft ⋮

▼ Table of Contents

[Organization Information](#)  
[Key Grant Information](#)  
[LOI \(Stage 1 of 2\)](#)  
[Confirmations](#)  
[Internal](#)

▼ Organization Information

Organization:	Llama Rescue Inc.
Primary Contact:	<span style="background-color: #ccc; padding: 2px 10px;"> </span>
Primary Signatory:	<span style="background-color: #ccc; padding: 2px 10px;"> </span>
Project Staff 1:	<span style="background-color: #ccc; padding: 2px 10px;"> </span>
Project Staff 2:	<span style="background-color: #ccc; padding: 2px 10px;"> </span>
Project Staff 3:	<span style="background-color: #ccc; padding: 2px 10px;"> </span>

▼ Key Grant Information

More on Searches under [Search Functionality](#) page.

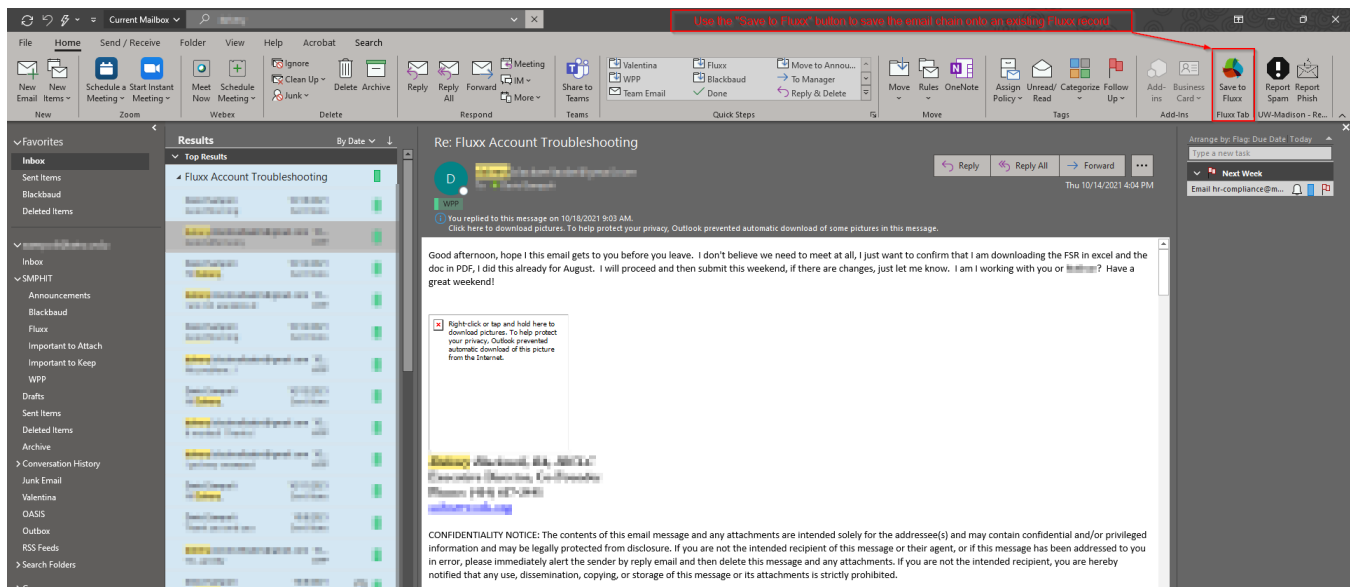
## Correspondence with Grantee in Fluxx

Within Fluxx, there are many different ways to generate correspondence to grantees. Additionally, Fluxx has a way to store correspondence that occurs **outside of the system** to records that exist within the system.

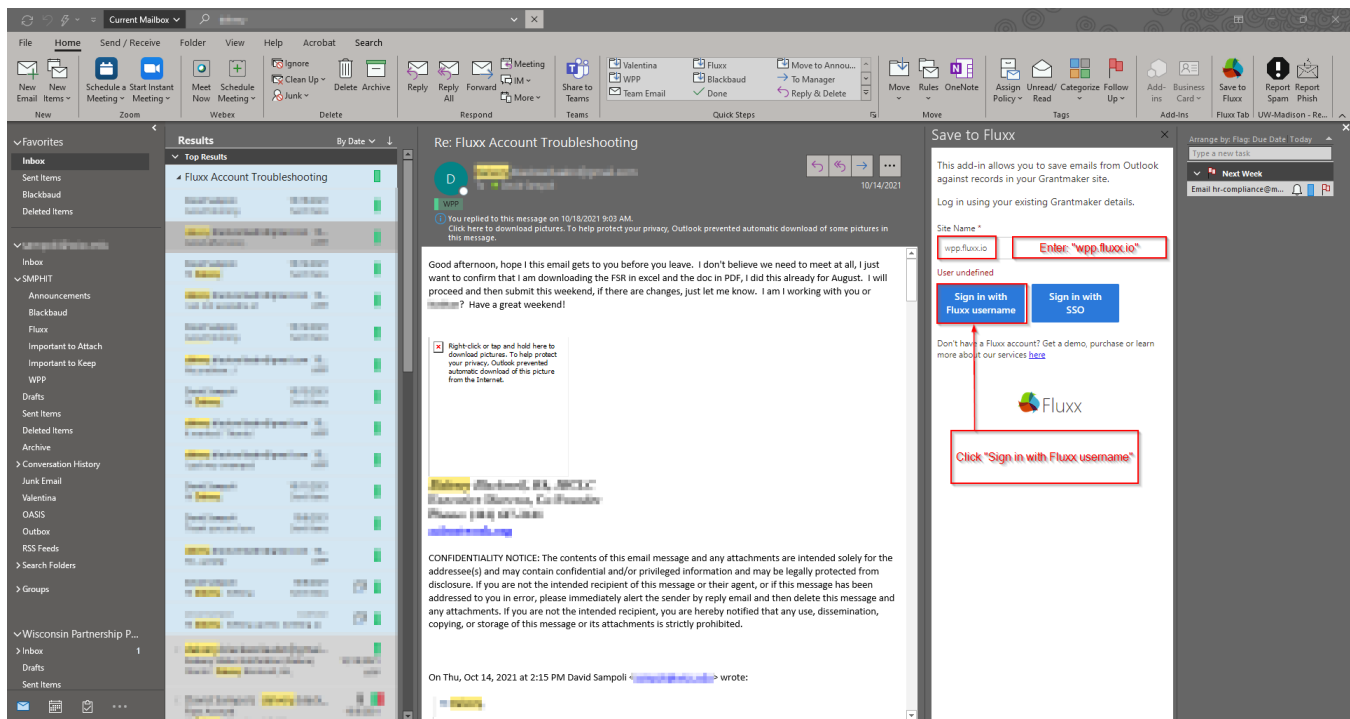
### Saving Correspondence From Outside the System to Fluxx

**Correspondence with Grantees in Outlook:** One of the main ways that Grantees communicate with the WPP is by emailing the Partnership Program. From Outlook, you can save an email chain onto an existing record within our Fluxx system using the [Fluxx Outlook Plugin](#).

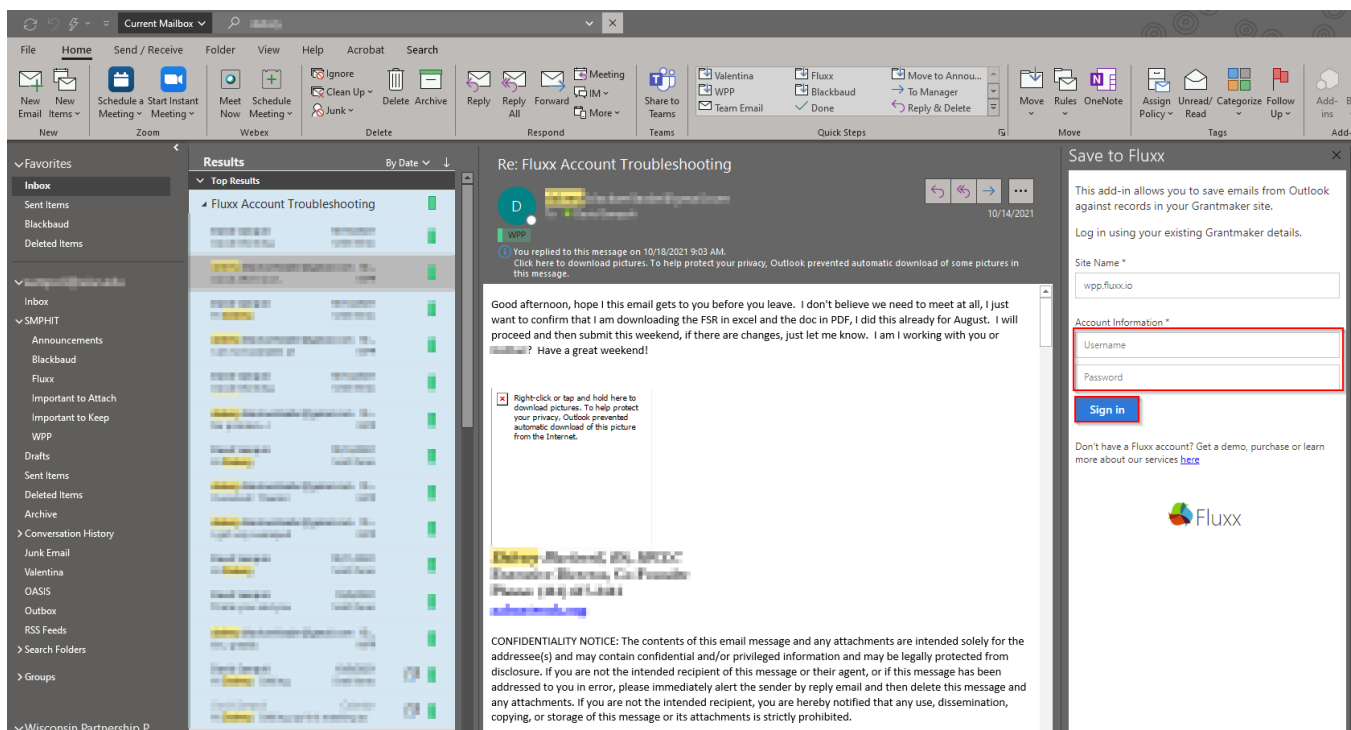
To begin, first download the Fluxx Outlook plugin by following the link above. Once the plugin is installed, you can save an email chain to Fluxx by selecting the plugin button "Save to Fluxx."



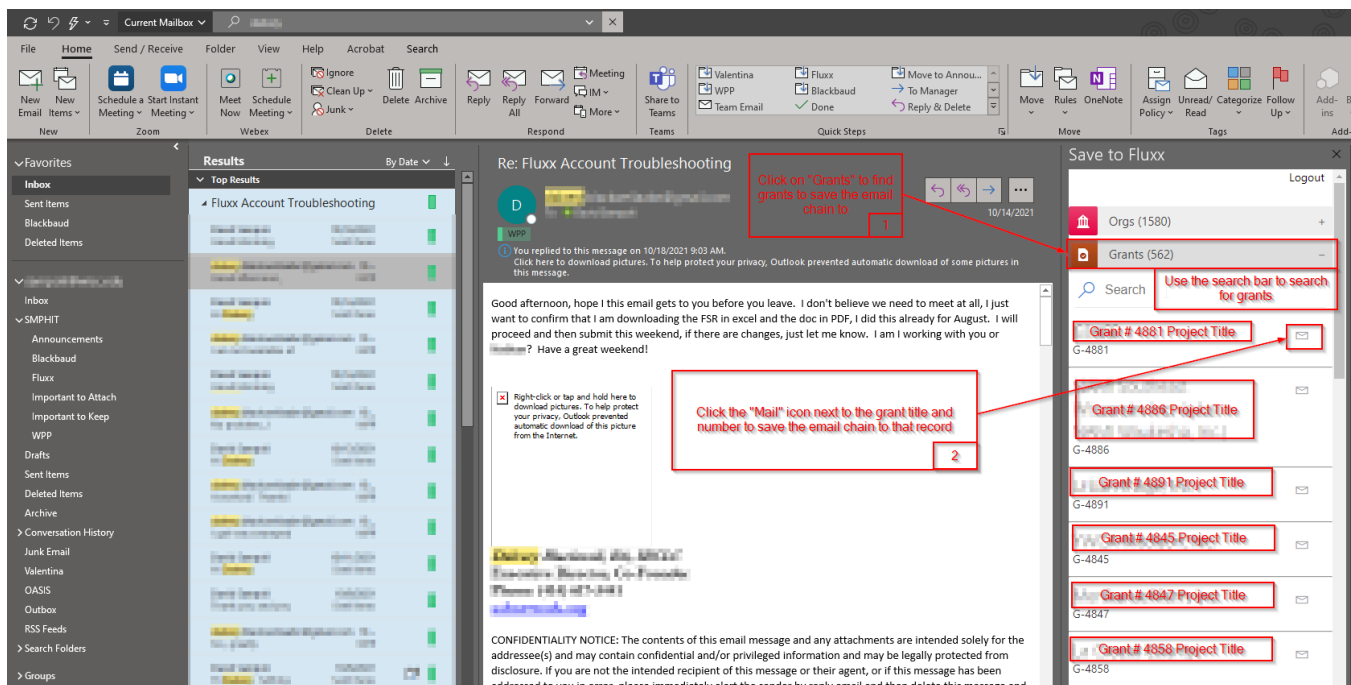
After you click "Save to Fluxx," you'll be prompted to enter information about our Fluxx instance. For "Site Name," you should type in "wpp.fluxx.io." Then click "Sign in with Fluxx username."



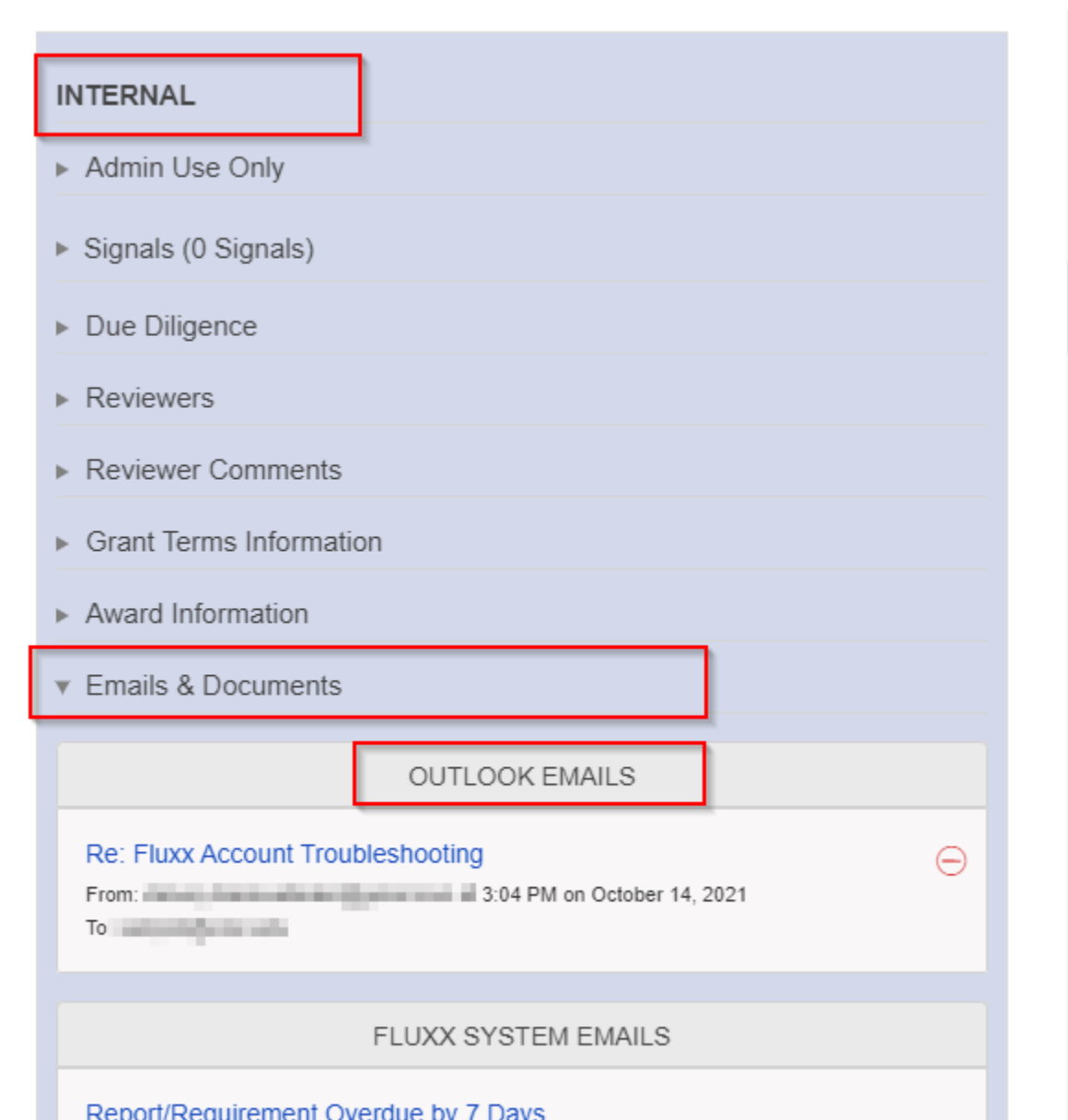
Once you do so, two boxes for your Fluxx account Username and Password will appear. Enter in the Username (email address) and Password that you use normally to sign into Fluxx and then click "Sign in."



After you click "Sign in," all of the records in the WPP's grant management database will appear organized under their record type (e.g. Grants will appear under the "Grants" tab). To save the email chain, first select a record type to save the email to (For the most part, it is recommended to save correspondence to a relevant **Grant** record since the Grant record type is at the center of the data from a Fluxx data mapping perspective.) After clicking the record type, all of the records underneath that type will appear with their Name and ID (you can also use the "Search" bar to find specific records). When you've found the record you want to save the email chain to, you can click the "Mail" icon next to the Record Name and ID. This will save the email chain to the record.



To see the email chain you saved, you'll just need to go to the record you saved the chain to in Fluxx and navigate to the "Internal" section. Within the Internal section, open up the subsection "Emails & Documents." The first item in "Email & Documents" is called "Outlook Emails" and stores the correspondence saved to the system from Outlook. Here, you can click on the hyperlink of the email subject like (in this case, "Re: Fluxx Account Troubleshooting") and the email chain will be opened up in a new Card on your current Fluxx dashboard.



## Emailing a Grantee From Within Fluxx

Within Fluxx, you send emails to grantees using **Email Templates**.

**Email Templates** store a combination of both plain, static text and dynamic text (which pulls data dynamically from the records that the email is being generated for) to generate messages that can be used for specific situations. **Example:** We have email templates set up to remind grantees when they have Requirements due within certain time windows (i.e. 30 days before, 1 day before, and 7 days after a Requirement Due Date). These messages pull dynamic data (such as the grantee's Grant Project Title name) and combine it with static text (i.e. "as stipulated in the Memorandum of Understanding.") to produce one cohesive email message.

Example of what an email template looks like within the Fluxx Admin Panel (this is the template for Requirement Due in 30 days). Text surrounded by a red box will dynamically pull data from the Requirement/Grant associated with this reminder; all other text is static.

The screenshot displays a document editor with a top navigation bar (Field, Table, Document Type, Liquid Block Tag, Raw) and a menu bar (File, Edit, Insert, View, Format, Table, Tools). The main content area shows an email template with three red boxes highlighting dynamic data pull fields: `model.request.project_title`, `model.model_theme.name`, and `model.due_at | format_date.`. A legend at the bottom indicates that a red box represents a dynamic data pull.

Field Table Document Type Liquid Block Tag Raw

File Edit Insert View Format Table Tools

Formats **B** *I* [List Icons] [List Icons]

[Link Icon] [Image Icon] [Print Icon] [Eye Icon] [Video Icon] A A [Smiley Icon]

This is a reminder that documentation of the following compliance document(s) is due for the grant, "`model.request.project_title`", as stipulated in the Memorandum of Understanding.

An updated `model.model_theme.name` report approval is due no later than `model.due_at | format_date.`

Complete and submit the document by logging into the Grantee Portal at [wpp.fluxx.io](http://wpp.fluxx.io). If you have any issues viewing your requirements, please let us know.

Questions should be directed to the Wisconsin Partnership Program at [wpp@hslc.wisc.edu](mailto:wpp@hslc.wisc.edu).

[Red Box] → Red box = dynamic data pull

Save

When that Report is Generated/Sent to the Grantee, those dynamic fields are replaced with the data found on the Grant/Requirement. The example below keeps all of the Dynamically pulled fields boxed in red, but shows how those fields populate with data now that the email is sent to a specific requirement:

## Report/Requirement Due in 30 days



### Report/Requirement Due in 30 days

to: "XXXXX [redacted]" <XXXXX@XXXXX.edu>

This is a reminder that documentation of the following compliance document(s) is due for the grant, [redacted] as stipulated in the Memorandum of Understanding.

An updated [redacted] report approval is due no later than [redacted].

Complete and submit the document by logging into the Grantee Portal at [wpp.fluxx.io](http://wpp.fluxx.io). If you have any issues viewing your requirements, please let us know.

Questions should be directed to the Wisconsin Partnership Program at [wpp@hslc.wisc.edu](mailto:wpp@hslc.wisc.edu).

There are two ways to send these email templates in Fluxx:

1. **System Emails:** The first way, which is both the most common way and the main way recommended, is to allow the system to send the email alert for you using logic. The system is capable of sending emails based on a record meeting specific criteria, i.e. that a Requirement is 30 days away from its Due Date and its status is still "New." When a record meets these criteria, the email alert will be automatically generated (and potentially automatically sent if "Automatically Send?" is set to yes).
  - a. This is the way that all email reminders are set up; i.e. 30 days before a Requirement's Due Date the grantees will receive an email letting them know that the requirement is due in 30 days.
2. **Manual Bulk Emails:** The second way is to use "Bulk Update" from within a Card screen in order to Bulk Send an email alert from a template. You will still need an email template, but instead of sending the email to only the records that meet specific criteria you can send the email alert out to a specific list of records that **you** want. You can also then utilize the Email Queue functionality in order to filter out emails even more granularly to only the specific contacts you need/want to contact.

## Letters

**Letter:** The user can generate longer-form documents that dynamically pull in fields from the related Grant Request; these are called **Letters**. These letters can be a big time saver; for example, in the past Partnership Program staff might have needed to manually write up the whole Grant Award Letter, but with the **Letter** functionality we can automate the generation of the Grant Award Letter from data we already have.

## Record Locking

**Record locking** is the technique prevalent across computing software platforms of preventing simultaneous access to data in a database (such as Fluxx), to prevent inconsistent results.

The classic example of what can occur **without** the use of record locking is demonstrated by two bank clerks attempting to update the same bank account for two different transactions in a system lacking record locking. Clerks 1 and 2 both retrieve (i.e., copy) the account's record. Clerk 1 applies and saves a transaction. Clerk 2 applies a different transaction to his saved copy, and saves the result, based on the original record and his changes, overwriting the transaction entered by clerk 1. The record no longer reflects the first transaction, as if it had never taken place.

A simple way to prevent this is to **lock the file** whenever a record is being modified by any user, so that no other user can save data while the first holds the lock. This prevents records from being overwritten incorrectly, but allows only one record to be processed at a time, locking out other users who need to edit records at the same time.

To allow several users to edit a database table at the same time and also prevent inconsistencies created by unrestricted access, a single record can be *locked* when attempting to edit or update it. Anyone attempting to edit the same record is denied edit access because of the lock (although they are able to view the record without editing it). Once the record is saved or edits are canceled, the lock is released. Records can never be saved so as to overwrite other changes, preserving data integrity.

## What It Looks Like in Fluxx

In Fluxx, all records are always readable. However, when you go to "**Edit**" the record, you may encounter a message stating that the record you are attempting to edit is **locked** and will also say which user is locking the record. An example of the message can be seen here:



The record you are editing is locked by [redacted] until 8/11/2022 14:14.

When the user who holds the lock **Saves & Closes** out of the record (i.e. their view returns to the "view-only" view), the record can be **edited** by the second user. The second user will then **hold the lock** on the record until they also **Save & Close** the record.