

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

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.

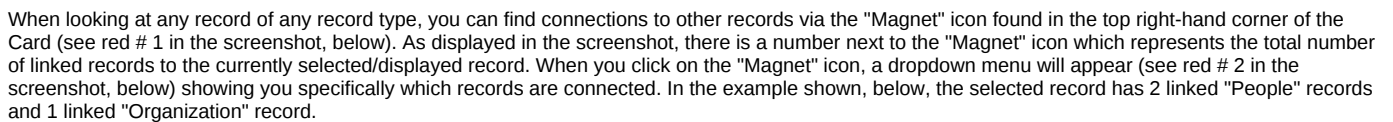
Not all cards display all records of a specific record type, however. As another example: the **Requests and Grants Card** stores ALL records for applications – ranging from those applications that were actually granted and are now closed grants to the applications we received and declined for one reason 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	+ Funding Sources	+ People	+ AdHoc Reports	+ Grant Data Archive
Completed Registrations	+ Funds	+ Organizations	+ Excel Reports	Grant Reports
+ Requests And Grants	+ Subfunds	Documents		
Denied & Withdrawn		Emails		
+ Requests				
Grants			SHARED CARDS	GENERIC TEMPLATES
Requirements			-- Select Card -- ▾	-- Select Template -- ▾
Payments				
Amendments				
Reviews				

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

Orgs

Payments

Requirements

Reviews

Funding Sources

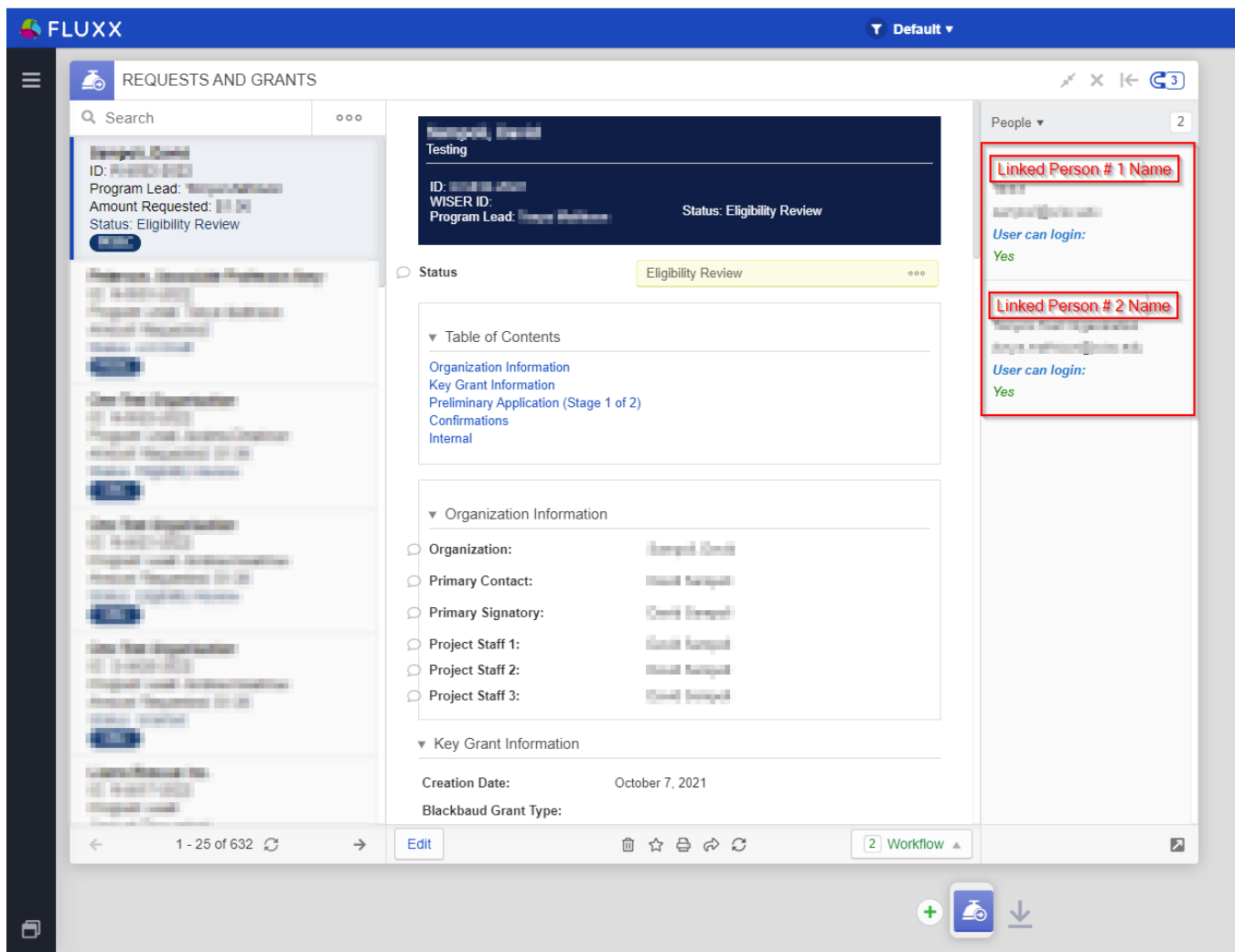
Meetings and Site Visits

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).



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

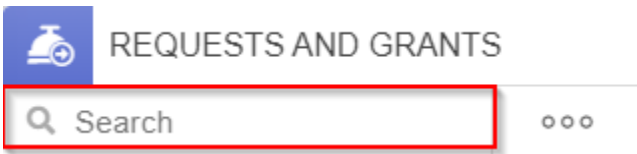
1 - 25 of 632

2 Workflow

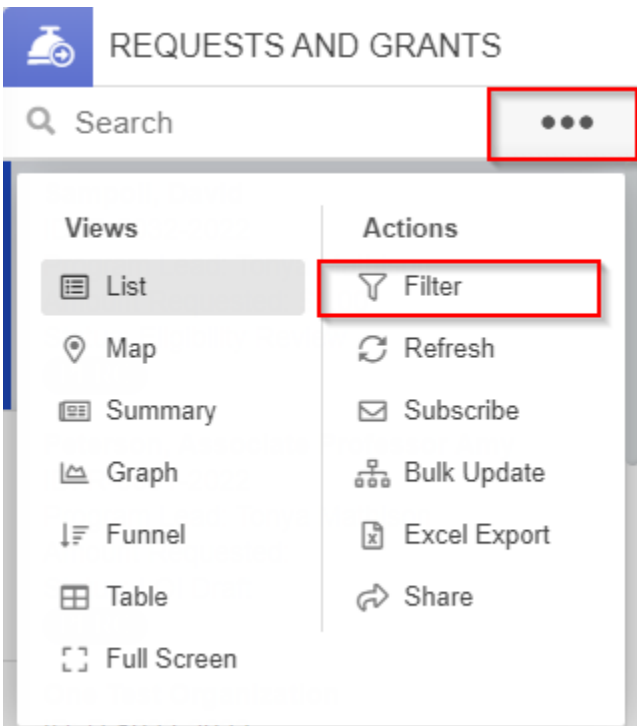
Clicking on the linked Person record will pull up a People Card with that user's information.

Forms

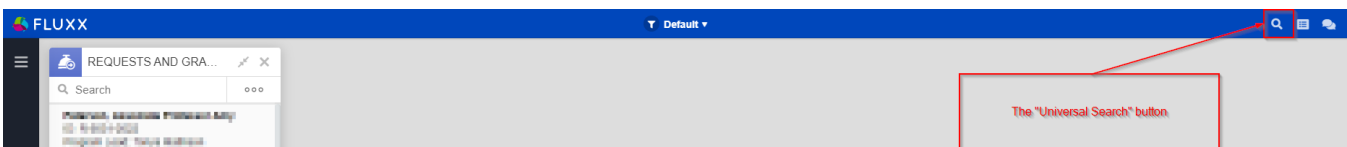
While **Cards** hold the data are the individual "components" that form dashboards, **Forms** are what determine **how** the data is displayed. For example, by editing a **Form** you could move the a field, say "Project Title," on a Request/Grant down below the field "Amount Requested." Please see the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



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: [REDACTED]
 Status: LOI Draft
PERC

Requests (1 of 1)

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

Requirements (1 of 1)

[REDACTED]
 Grant ID: [REDACTED]
 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:	[REDACTED]
Primary Signatory:	[REDACTED]
Project Staff 1:	[REDACTED]
Project Staff 2:	
Project Staff 3:	

▼ Key Grant Information

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

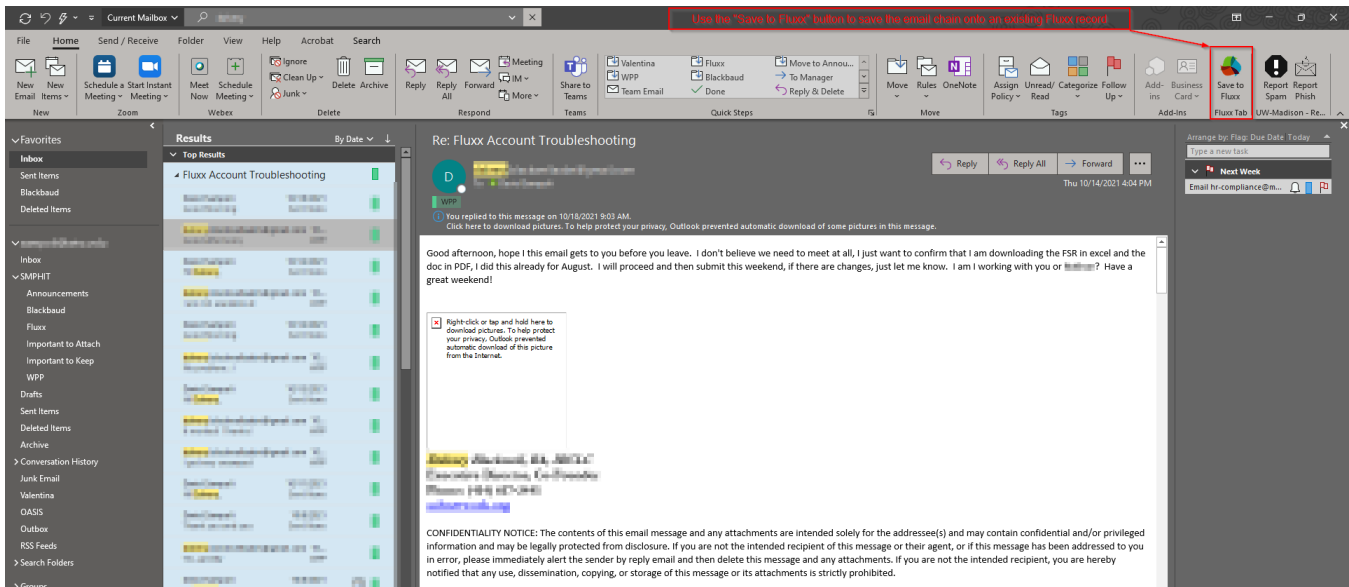
Correspondence with Grantee in Fluxx

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.

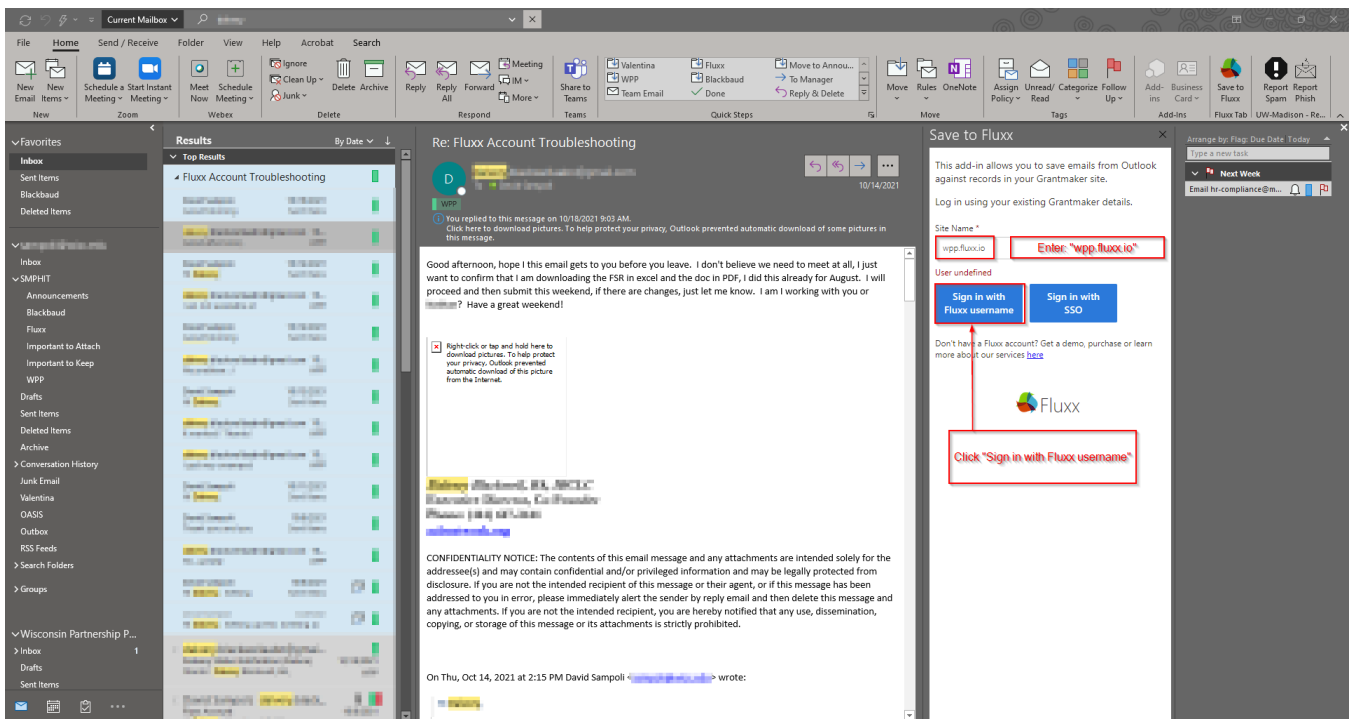
Saving Correspondence From Outside the System to Fluxx

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](#).

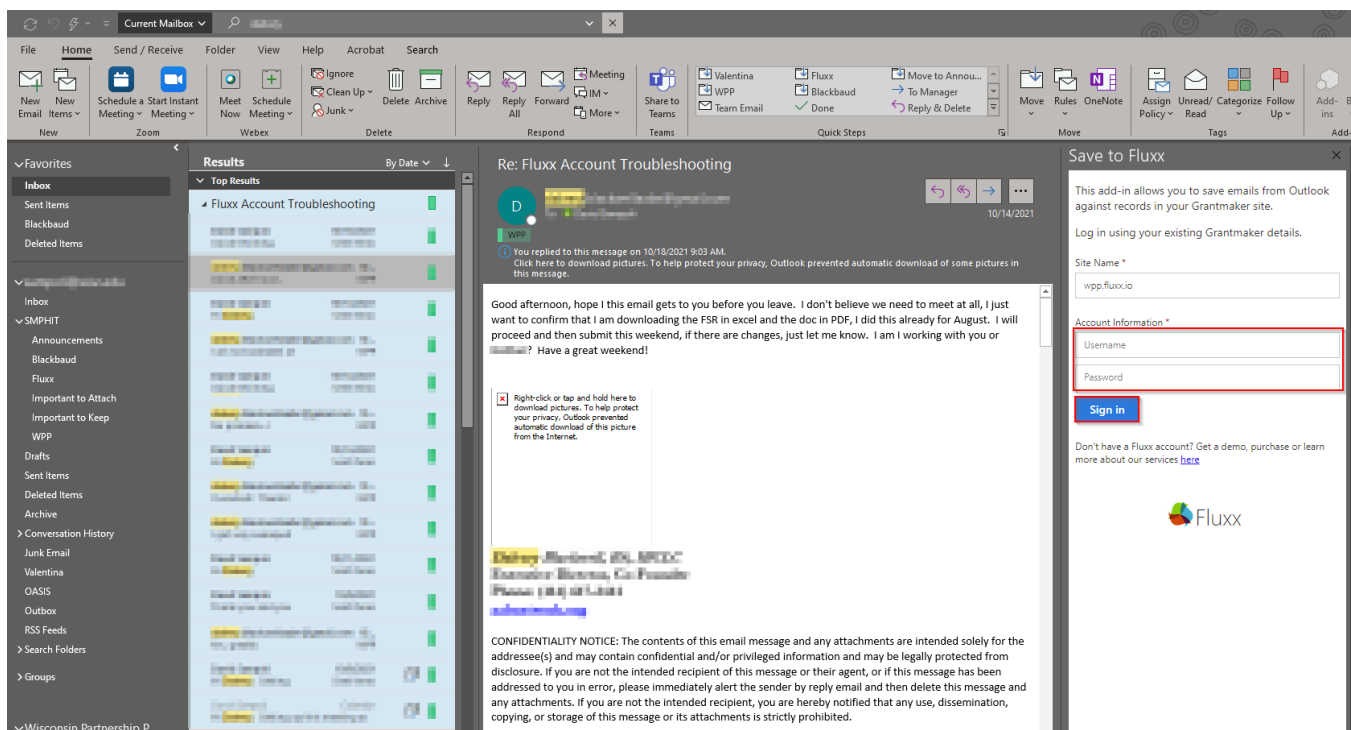
To begin, first download the Fluxx Outlook plugin by following the link above. Once the plugin is installed, you can save an email chain to Fluxx by selecting the plugin button "Save to Fluxx."



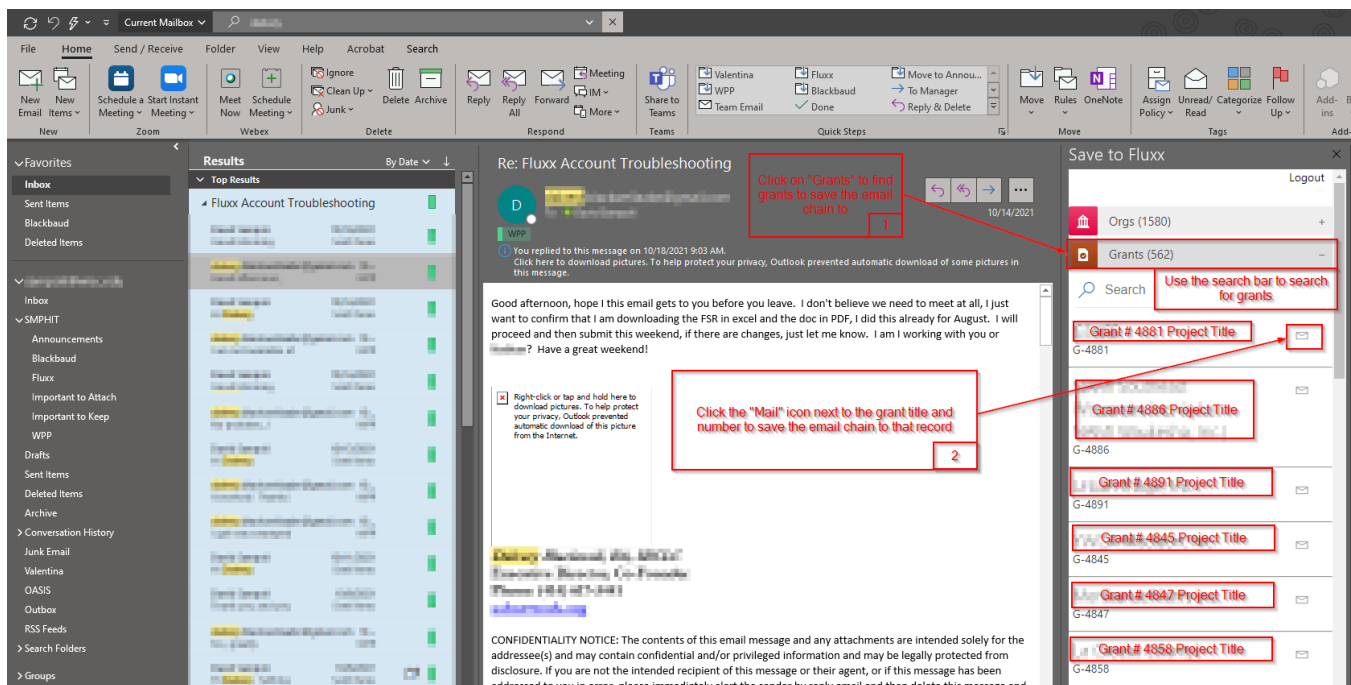
After you click "Save to Fluxx," you'll be prompted to enter information about our Fluxx instance. For "Site Name," you should type in "wpp.fluxx.io." Then click "Sign in with Fluxx username."



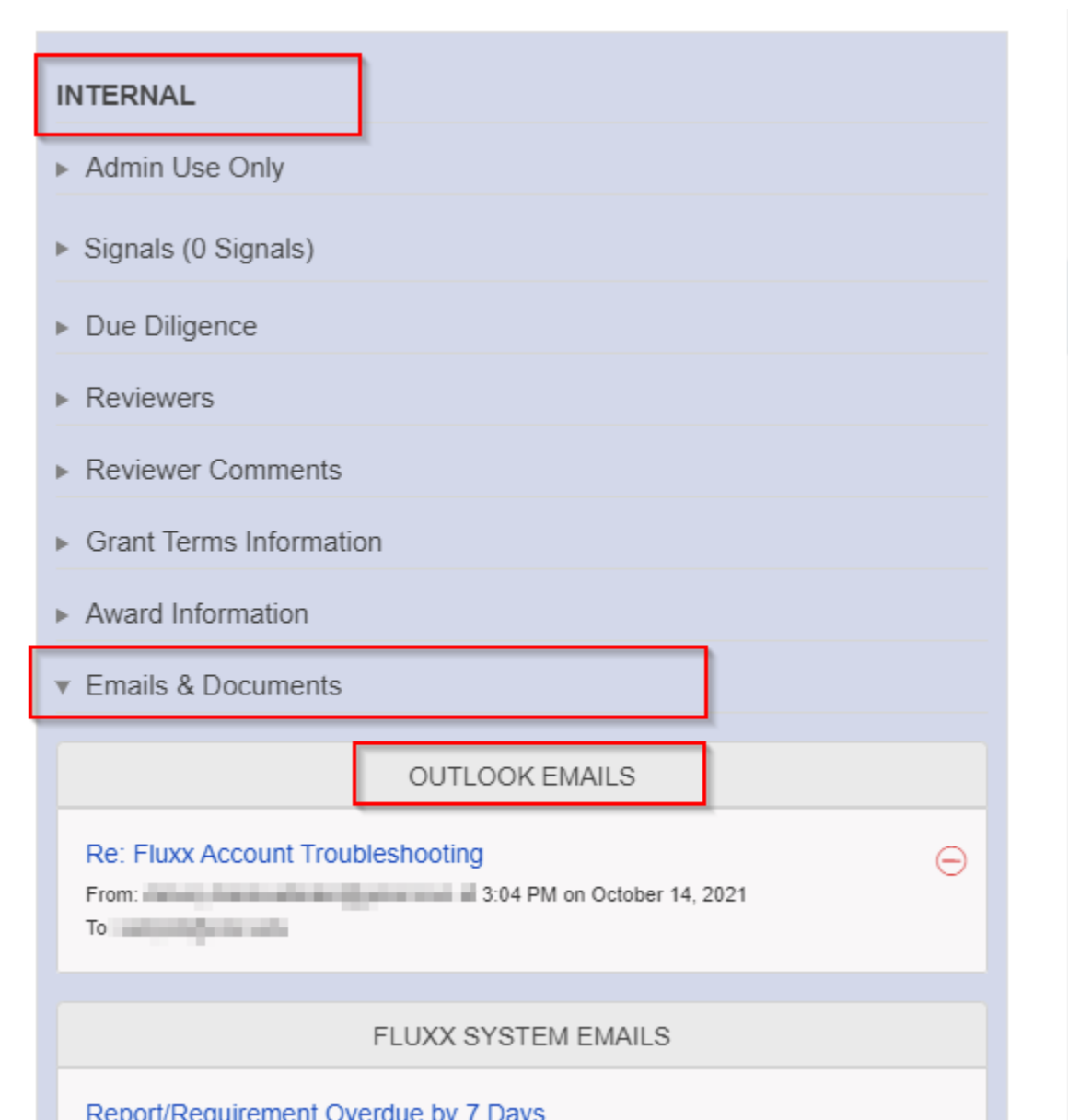
Once you do so, two boxes for your Fluxx account Username and Password will appear. Enter in the Username (email address) and Password that you use normally to sign into Fluxx and then click "Sign in."



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 shows 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 editor contains a draft email template with several red boxes highlighting dynamic data placeholders:

- `{model.request.project_title}` in the first paragraph.
- `{model.model_theme.name}` in the second paragraph.
- `{model.due_at | format_date:}` in the second paragraph.

Below the text, a legend shows a red box followed by an arrow pointing to a larger red box containing the text "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. 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.

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.