

Programs Tab of the Admin Menu

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The **Programs tab** of the Admin Menu allows admins to create/edit/delete **Programs**, **Subprograms**, **Initiatives** (not used by WPP), and **Sub Initiatives** (also not used by WPP).

What is a Program?

Programs are to Fluxx what **Funds** are to the WPP; they represent the **highest-level grouping** of grants within the system and are one of the primary items used to filter grants. WPP has two Programs (and therefore Funds): the Partnership Education and Research Committee (PERC) and the Oversight and Advisory Committee (OAC).

Within the WPP's instance of Fluxx, **Programs** are tied 1:1 with **Funds**. As you can see from this example Community Impact Grant below, WPP always stamps **both** the **Program** and the **Fund** on every grant (even though these are the same value). This resulted from our transition from Blackbaud Fluxx where the **Fund** was the old default used in Blackbaud, but **Program** is a default field in Fluxx that **must** be filled in. Additionally, **Subprograms** are equivalent to **Subfunds** for the WPP (also seen in the screenshot below).

▼ Award Information

Program:	Oversight and Advisory Committee
Sub Program:	Community Impact Grant
Program Lead:	[Redacted]
Fund:	Oversight and Advisory Committee
Fund:Subfund:	Community Impact Grant

Funds Tab

The **Funds** tab within the Admin menu lets an admin create/edit/delete **Funds**. See the screenshot below for highlighted items from this page and beneath the screenshot for descriptions of said items.

The screenshot shows the FLUXX application interface with the 'Funds' tab selected. The interface is divided into a left sidebar, a main content area, and a right 'Attributes' panel. Numbered callouts highlight specific elements:

- Box # 1:** Points to the 'Funds' tab in the top navigation bar.
- Box # 2:** Points to the 'Partnership Education and Research Committee' entry in the 'All Programs' list.
- Box # 3:** Points to the 'Name' field in the 'Attributes' panel, which contains 'Partnership Education and Research Committee'.
- Box # 4:** Points to the 'Description' field in the 'Attributes' panel.
- Box # 5:** Points to the 'Parent Fund' dropdown menu in the 'Attributes' panel, which is set to 'All Programs'.
- Box # 6:** Points to the 'Retired' checkbox in the 'Attributes' panel, which is currently unchecked.
- Box # 7:** Points to the 'Delete' button at the bottom right of the 'Attributes' panel.
- Box # 8:** Points to the 'Save' button at the bottom right of the 'Attributes' panel.
- Box # 9:** Points to the 'New Fund' button at the bottom of the main content area.

- Box # 1:** Shows the **Funds** tab as currently selected.
- Box # 2:** Shows the **Fund** that you currently have selected. You can tell which **Fund** is currently selected NOT ONLY based off of the name (match name of **Fund** with "**Name**" from box # 3), BUT ALSO from the **slim green line** that appears to the **LEFT** of the Fund name.
- Box # 3:** Shows the **Fund Name**. This can be changed at any time without breaking anything in the system; however, we have trained employees on the current **Fund** names, so please do **NOT** change these names unless you have a very good reason to do so.
- Box # 4:** Shows the **Fund Description**. This is NOT required and WPP has generally not filled these out.
- Box # 5:** Shows the **Parent Fund** for this fund. Any **Program** that is NOT **All Programs** will have a Parent Fund = All Programs. This is so that, if **someone's Role is setup with "All Programs"** (as the WPP recommends), then they will have access to records from All Programs (not just OAC or PERC).
- Box # 6:** Shows the **Retired** checkbox. If this **IS** checked, then the **Program** is considered Retired and will no longer be available for selection from the normal dropdown menus.
- Box # 7:** Shows the **Delete** button. Please do **NOT** click this button unless a Program has been created in error; **Programs have Subprograms** linked out underneath them, so deleting a **Program** can not only screw up many of the applications/grants in the system, but also unlink all of the Subprograms from the Program that is deleted. Long story short: Do not do this unless it's truly necessary.
- Box # 8:** Shows the **Save** button where you can save any changes that you have made to the Program. If you've made **any** changes, you **must** hit the save button in order for your changes to be effectuated. Otherwise, **your changes will be discarded**.
- Box # 9:** Shows the **New Fund** button where you can create a new Fund if necessary. For the WPP, this shouldn't ever be necessary (unless drastic changes are made to the OAC/PERC or a new committee is added, all all of which is highly unlikely).

Subfunds Tab

Nearly identical to the **Funds** tab, the **Subfunds** tab allows you to create/edit/delete **Subfunds**. Please see the screenshot below to see highlighted, important items from the **Subfunds** tab and beneath the screenshot for descriptions of said items.

The screenshot displays the FLUXX application interface for managing subfunds. On the left, a sidebar contains various navigation options. The main area shows a list of subfunds, with the 'Collaborative Health Sciences Program' selected. The 'Attributes' panel on the right allows for editing the selected subfund's details. Numbered boxes 1 through 9 identify key UI components for user guidance.

- Box # 1:** Shows the **Subfunds** tab as currently selected.
- Box # 2:** Shows the **Subfund** that you currently have selected. You can tell which **Subfund** is currently selected NOT ONLY based off of the name (match name of **Subfund** with "**Name**" from box # 3), BUT ALSO from the **slim green line** that appears to the **LEFT** of the Subfund name.
- Box # 3:** Shows the **Subfund Name** field. This can be edited/configured at any time without breaking anything in the system; however, please **refrain from changing the names of existing Subfunds unless absolutely necessary** as we have trained employees on the current names.
- Box # 4:** Shows the **Subfund description** box where a description can be provided for this Subfund. Descriptions are **optional**, and WPP does not generally fill out these descriptions.
- Box # 5:** Shows the **Fund** field for the Subfund. Every **Subfund** has to live **underneath** a Fund. Most are fairly straightforward; Subfunds with **Community** in their name are generally **OAC** Subfunds, and those with **PERC** or **Science** in their name are generally **PERC** Subfunds.
- Box # 6:** Shows the **Retired** checkbox. If this **IS** checked, then the Subfund will be considered **Retired** and will NOT be available for selection from the usual dropdown menus where it is found.
- Box # 7:** Shows the **Delete** button where you can delete this Subfund. Please do **NOT** click this button unless a Subfund has been created in error; deleting a **Subfund** can screw up many of the applications/grants in the system that were tied to this Subfund. Long story short: Do not do this unless it's truly necessary.
- Box # 8:** Shows the **Save** button where you can save any changes made to this Subfund. If you've made **any** changes, you **must** hit the save button in order for your changes to be effectuated. Otherwise, **your changes will be discarded**.
- Box # 9:** Shows the **New Subfund** button where you can create a new Subfund if needed.

Initiatives and Subinitiatives

The WPP **suppresses** "Program Levels" **below the Subfund-level**. This means that we do NOT make sure of Initiatives or Subinitiatives. If we did, they would function similarly to Subfunds but would be 1 - 2 levels **beneath the subfund**. Therefore, these tabs are NOT used by the WPP.