Fluxx Search Functionality

Table of Contents

Overview

Fluxx's search functionality works quite a bit differently from how both Blackbaud's and Legacy's did.

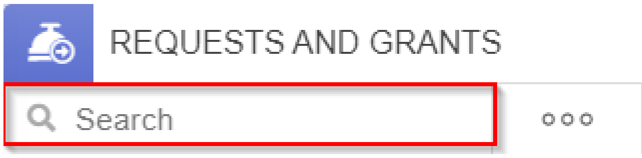
Within Fluxx, there are four types of searches we regularly use: **Card Searches**, **Card Filters**, **Universal Searches**, and **Ad-Hoc Reports**.

Card Searches

A **Card Search** is the simples of searches within Fluxx. It will search for numbers, names, or text strings that match the searched term within the **card** you entered the search term for. **Please Note**: A **Card Search** will only be able to search/find records for the card you are searching if the card's **filters** pull in those records to begin with. If, however, the filters added to your card **filter out**, for example, every Community Impact Grant, searching for the Reference Number (ID) of one of the Community Impact Grants will **NOT** return any results since those records aren't "in" the card to begin with due to your filters.

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 $10,000). Instead, you can type in things such as the 4 digit Grant Reference Number, Principal Investigator Name, grantee organization name, etc. in order to find records associated with a specific Grant.

Please see the screenshot to below to see an example card's (in this case, a Requests and Grants card) search bar. **Please note**: this search bar can be found for **ALL** card types, not just Requests and Grants.



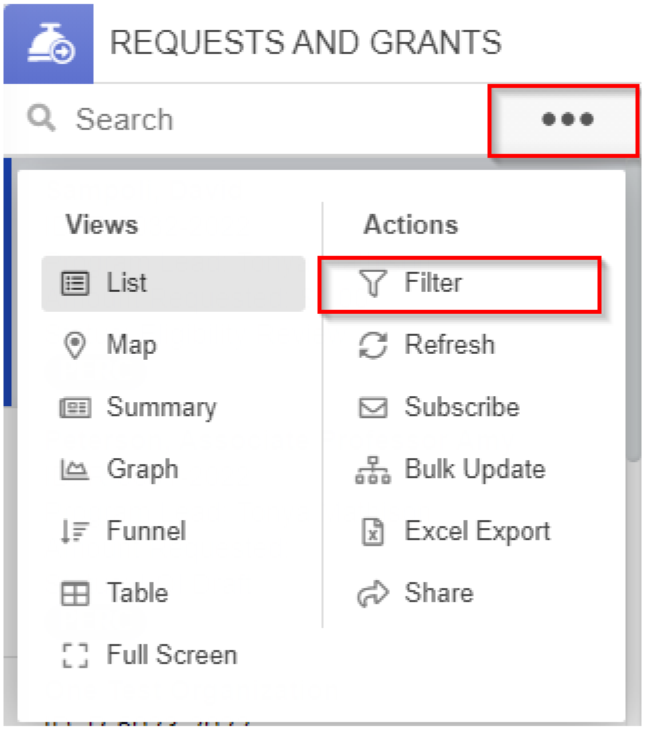
Card Filters

Card Filters are also found within the card itself; however, this is the **precision** method for searching records.

In Fluxx there are **two types of filters**: **Basic Filters** and **Advanced Filters**. Both allow you to filter records on the card, but **Advanced Filters** are both more complicated and more flexible that **Basic Filters**.

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** (using **Advanced Filters** – more on that in a second) to find records that match the specific criteria you enter. For example, within filters you could find Grants whose Grant Amount is greater than $10,000 and where the Primary Topic is Cancer.

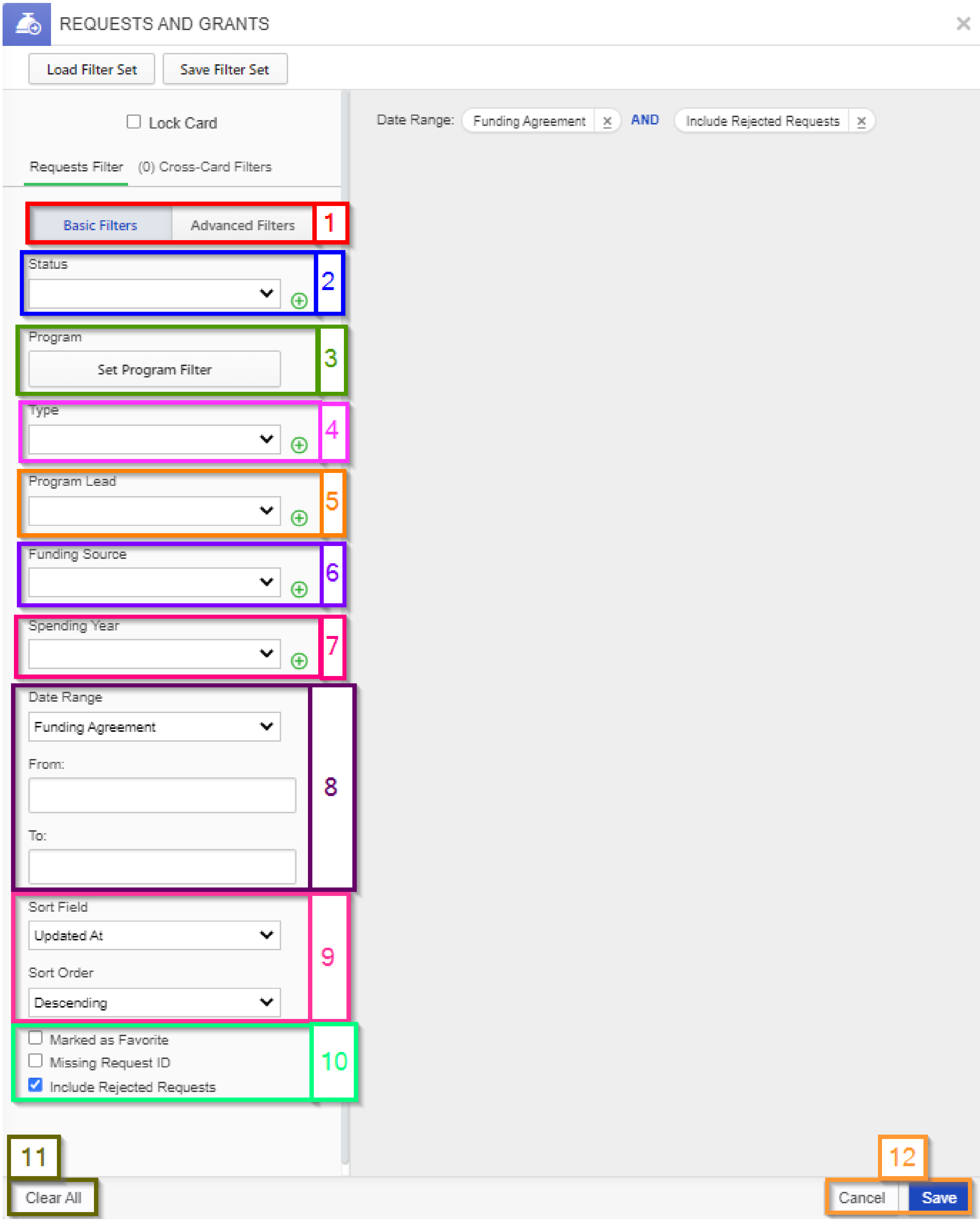
Please see the screenshot below to see the **Three Dots Menu** from a card and the **Filter** button from within the menu that pops up when you click the **Thre e Dots Menu** button.



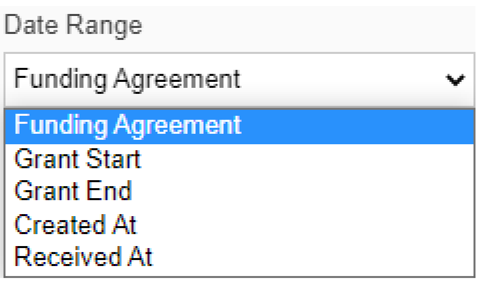
Basic Filters

When you click on the "**Filter**" button as shown in the screenshot above, you'll by default be brought to the **Default Filters** screen.

Default Filters are filters for the **most commonly used items/search terms** within Fluxx, allowing you to create useful searches quickly and without headache. Please see the screenshot below for highlighted, important items from the **Basic Filters** screen for the **Applications, Requests and Grants, and Grants** record types (the central record types in our database) and beneath the screenshot for descriptions of said items. Please note that, while the **B asic Filters** offered by different record types are NOT all the same, they share a number of similarities. Since the **Applications and Grants** record types are the most important for the WPP, this guide will focus on those record types. Please feel free to play around with other record types' **Basic Filters** in order to get a better understanding for what is offered for each different record type.



1. **Box # 1**: Shows the **Basic Filters** vs. **Advanced Filters** toggle. Currently, **Basic Filters** are selected (you can tell since the text "Basic Filters" is highlighted in **blue**). If you want to switch to **Advanced Filters**, you just need to click on the words "**Advanced Filters**" to toggle to the other filter type.
2. **Box # 2**: Shows the **Status** filter. This allows you to filter based off of a the **status** of Applications and Grants records. This is likely **the** most important search term in ALL of Fluxx.

3. **Box # 3**: Shows the **Program** filter allowing you to filter records based off of their **Fund** and their **Subfund**. For example, using this filter you could select only Applications and Grants which are for the OAC Community Impact Grant Program.
4. **Box # 4**: Shows the **Type** filter. This is the **Form type** of the grant application, i.e. which form within the system did they use/fill out for their application. This is a **critical** data point; with it, you can filter down to just the 2022 MCH Applications and Grants, the 2022 Community Impact Applications and Grants, the 2021 PERC New Investigator Applications and Grants, etc.
5. **Box # 5**: Shows the **Program Lead** filter. In WPP terminology, this is the **Program Officer** that is responsible for the Application RfP. For example, selected "Person X" will display all of the Applications and Grants for which Person X is listed as the main **Program Officer**.
6. **Box # 6**: Shows the **Funding Source** field. This allows you to search by **joint subfund** for grants. Unlike the **Program** filter (Box # 3), where everything has to be split out into either OAC **OR** PERC, this allows for subfunds which are **shared** between OAC and PERC to be selected.
    a. For example, the 2021 COVID-19 response RfP was for BOTH OAC applications AND PERC applicants. Within the **Program** filter, these had to be split out as "OAC 2021 COVID-19 Response Grants" and "PERC 2021 COVID-19 Response Grants." However, the **Funding Source** is just "2021 COVID-19 Response Grants" and will pull back BOTH OAC and PERC Applications and Grants of this type.
    b. This is useful for quickly pulling all grants for one type of RfP if the RfP was split between OAC and PERC, rather than having to run two search or play with the Program filter to include BOTH OAC and PERC applications and grants of that type.
7. **Box # 7**: Shows the **Spending Year** dropdown menu. This corresponds to the **Fiscal Year** in which funding was **awarded** for a given grant. For example, if I select "2022" from the dropdown menu, I will find all grants who were **awarded** with funding in between July 1st, 2021 and June 30th, 2022 (which is equivalent to UW's Fiscal Year 2022).
8. **Box # 8**: Shows the Date Range search term field. The three fields here work together for the date range search to work.
    a. The **Date Range** field is the **anchor field** that determines how the two **date fields** are used. There are four options to pick for this date range:
        i. 

        ii. **Funding Agreement**: The search will start from the **From** date and go to the **To** date looking for grants whose **Funding Agreement** was agreed to within that date range. **Funding Agreement** date means the date when the WPP agreed to fund this grant.
        iii. **Grant Start**: The search will start from the **From** date and go to the **To** date looking for grants whose **Project Start Date** is within that date range.
        iv. **Grant End**: The search will start from the **From** date and go to the **To** date looking for grants whose **Project End Date** is within that date range.
        v. **Created At**: The search will start from the **From** date and go to the **To** date looking for grants whose **Created Date** is within that date range. The **Created Date** is the date that the application was **first started**.
        vi. **Received At**: The search will start from the **From** date and go to the **To** date looking for grants whose **Received Date** is within that date range. The **Received Date** is the date that the application was **first submitted to the WPP**.
9. **Box # 9**: Shows the **Sort** options that determines how your card will **sort** the records that meet your filters. The **Sort Field** will determine what **Fiel** the system will sort based off of (by default: Time Last Updated). The **Sort Order** has two options: Ascending (going upwards) or Descending (going downwards).
10. **Box # 10**: Shows three checkboxes that change functionality for the cards filters.
    a. **Marked as Favorite**: Will pull in only records that have been **marked as a favorite** (ones that you have explicitly "starred"). Please note: Since favorites are unique to each user, this will show **different records to different users**.
    b. **Missing Request ID**: Will pull in requests that are **missing** and ID. None of our requests/grants should be missing an ID, so this checkbox should not be relevant to us.
    c. **Include Rejected Requests**: Will pull in records that are technically **Rejected**. Records are counted as **Rejected** are those that are **Declined** and **Withdrawn**. If this box is **NOT** checked, these records will be hidden by default (even if one of these statuses is explicitly selected but the checkbox is NOT checked).
11. **Box # 11**: Shows the **Clear All** button where you can clear ALL currently selected criteria from this filter.
12. **Box # 12**: Shows the **Cancel** and **Save** buttons. Hitting **Cancel** will cancel whatever filters you added here and bring you back to the card as it was before you clicked the "**Filter**" button in the first place. Hitting **Save** will save your filter criteria and then proceed to filter the card to display only the records that meet your criteria.

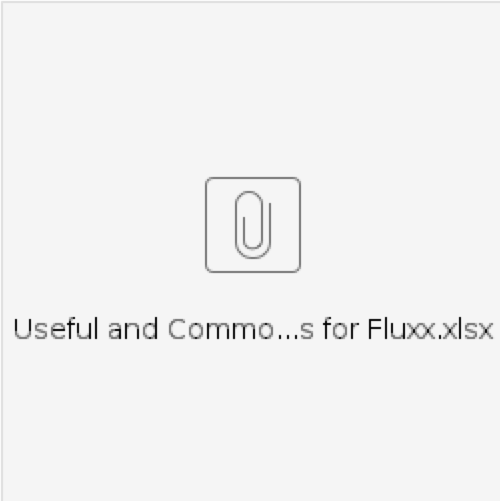
That covers all of the options available for **Basic Filters**.

Advanced Filters

Similar to **Basic Filters**, **Advanced Filters** allow you to filter records in your card based on criteria. Unlike **Basic Filters**, however, **Advanced Filters** do NOT have a set of pre-configured criteria to chose from; instead, the search is **entirely** up to you, the user.

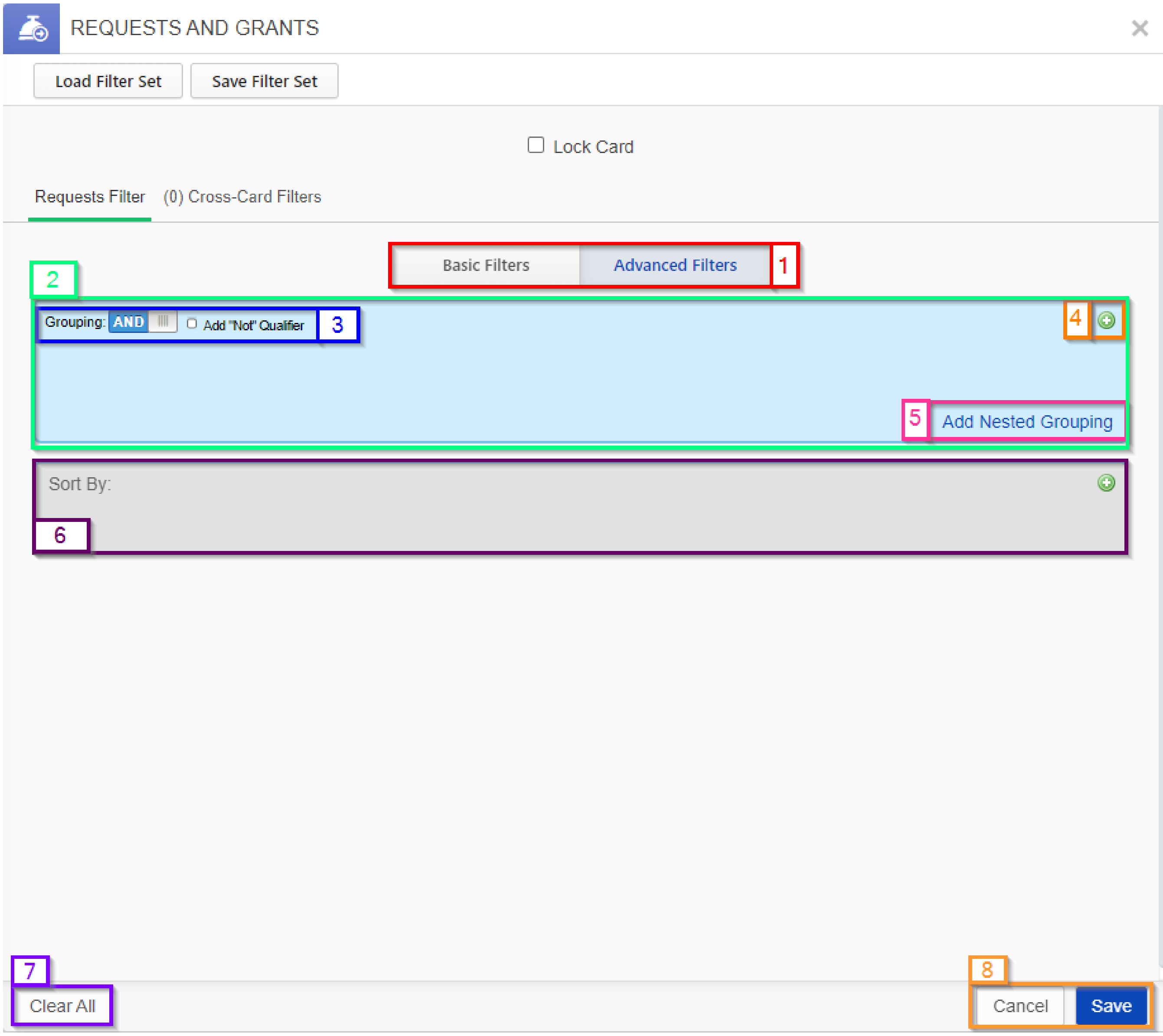
Before You Begin...

When using **Advanced Filters**, you'll need to know what the column names for important fields are. Please see the Excel sheet linked below to find important and frequently used columns in Fluxx and what they do.



Using Advanced Filters

Please see the screenshot below for highlighted, important items from the **Advanced Filters** screen and beneath the screenshot for descriptions of said items.

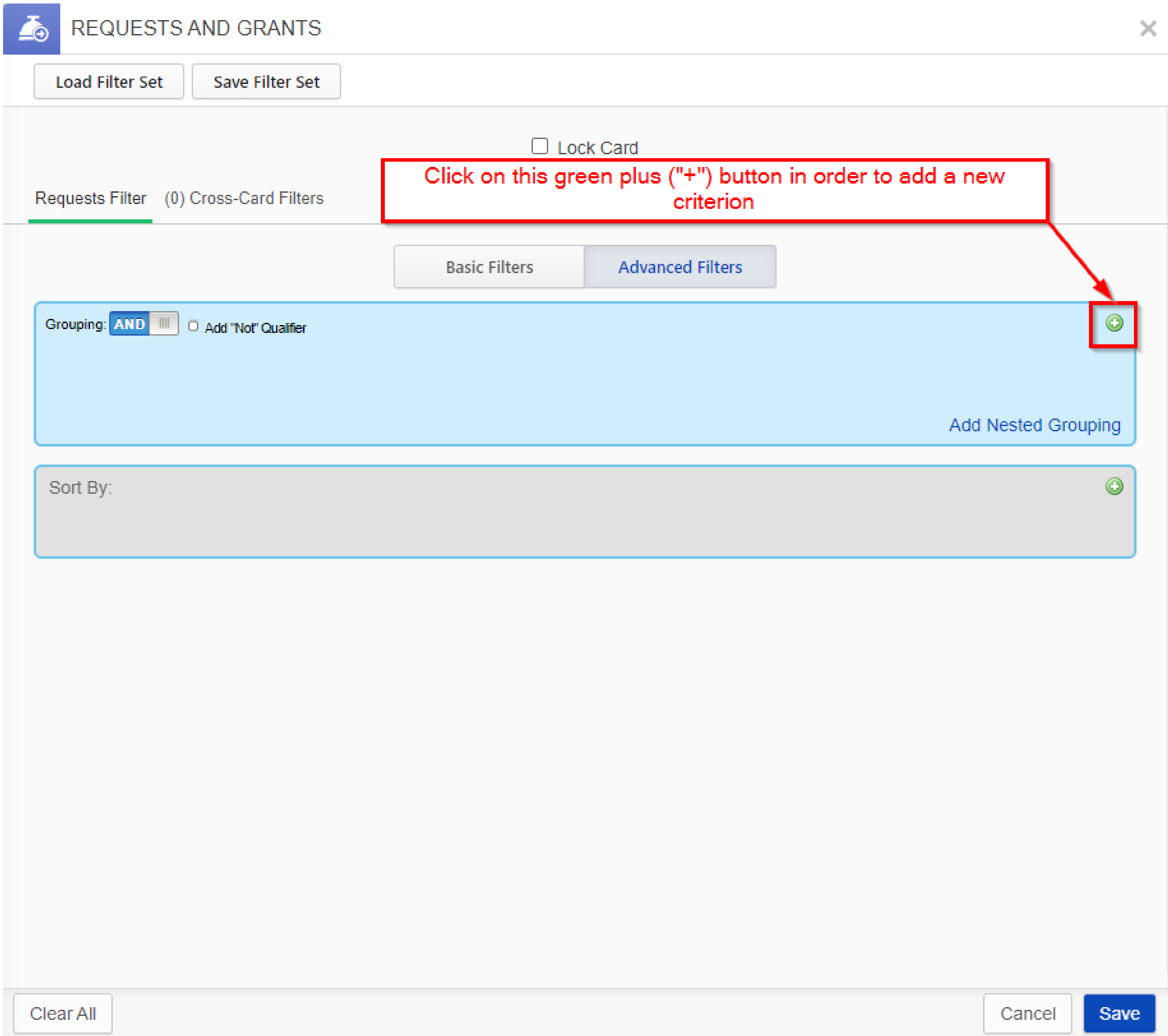


1. **Box # 1**: Shows the **Basic Filters** vs. **Advanced Filters** toggle. Currently, **Advanced Filters** are selected (you can tell since the text "Advanced Filters" is highlighted in **blue**). If you want to switch to **Basic Filters**, you just need to click on the words "**Basic Filters**" to toggle to the other filter type.
2. **Box # 2**: highlights the blue criteria box. All criteria added to the **Advanced Filters** will appear here in this blue box.
3. **Box # 3**: Shows the "**Grouping**" toggle for the criteria. By default, all criteria have **AND** logic between them; by clicking on that "**AND**" toggle, you can switch the **Grouping** type to **OR** logic in between the criteria. This can be useful if you are looking for records that have **EITHER** meet Criterion A **OR** meet Criterion B. Additionally, by clicking the checkbox to the left of the text "**Add "Not" Qualifier**" you can add NOT logic into the search.
4. **Box # 4**: Shows the **Green Plus ("+") Button** where you can add new criteria to the **Advanced Filters** box. Clicking on that **Green Plus Button** will pull up a new screen allowing you to select ANY of the fields available for that specific record type. In this example, clicking the Plus button will result in you being able to select from **every** field available for the Application and Grants record type.
5. **Box # 5**: Shows the **Add Nested Grouping** button. When you click on this button, you will added a new **subgrouping** within the blue box; every subgrouping can have its own **Grouping** (see Box # 3). This way, you can have really tricky logic for your criteria (e.g. either the record meets Criterion A or it meets Criterion B **AND** it also has to meet Criterion C and Criterion D).
6. **Box # 6**: Shows the **Sort By** box. Similar to the the green plus button shown in **Box # 4**, there is a Green Plus Button here that allows you to add **any field for this record type** as the sort field; from there, you'll be able to choose whether that field should be used to sort the records in an **Asc ending** fashion or a **Descending** fashion.
7. **Box # 7**: Shows the **Clear All** button where you can clear ALL currently selected criteria from this filter.
8. **Box # 8**: Shows the **Cancel** and **Save** buttons. Hitting **Cancel** will cancel whatever filters you added here and bring you back to the card as it was before you clicked the "**Filter**" button in the first place. Hitting **Save** will save your filter criteria and then proceed to filter the card to display only the records that meet your criteria.

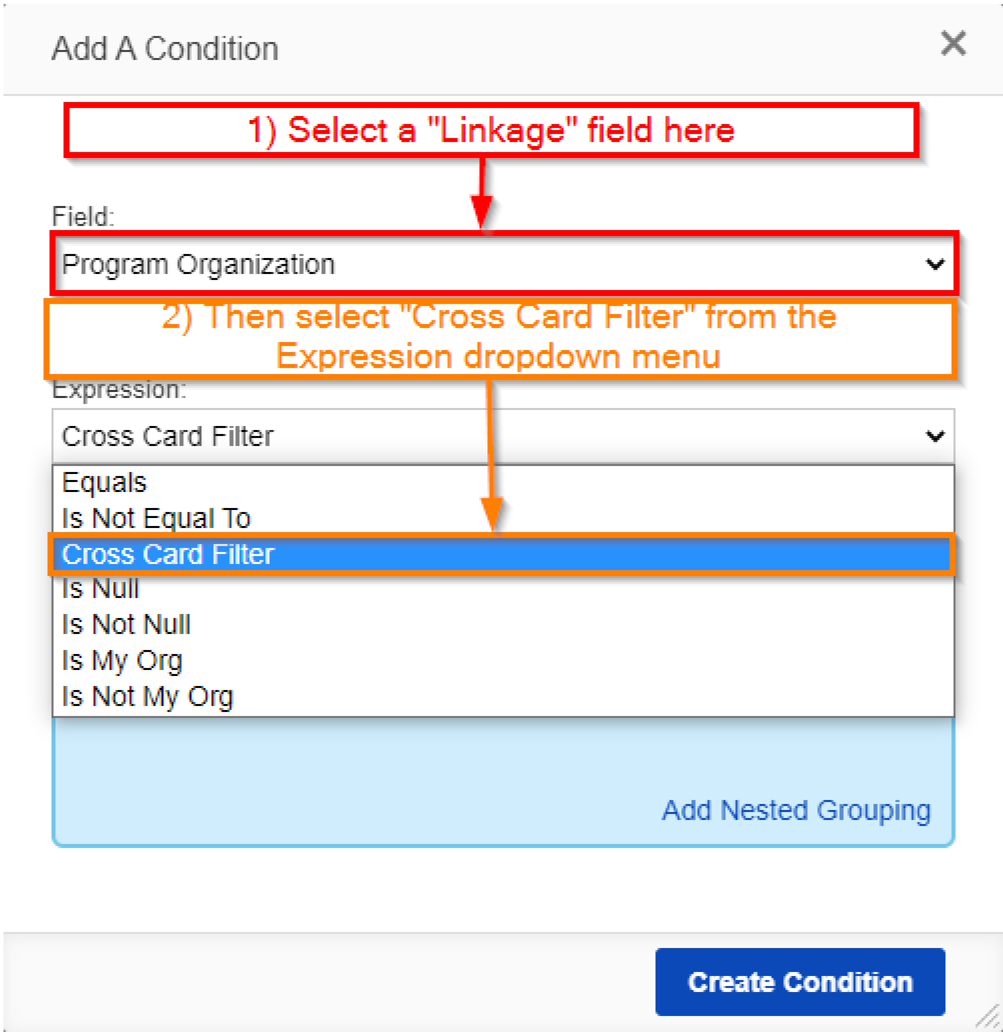
Cross Card Filters with Advanced Filters

Let's say that you're filtering for records of the **Applications and Grants** record type, but you want to find these records based off of information held on another record type. Let's say, for this example, that you want to find Grants where the Organization that requested the grant is based out of Milwaukee. This is all achievable within **Advanced Filters**.

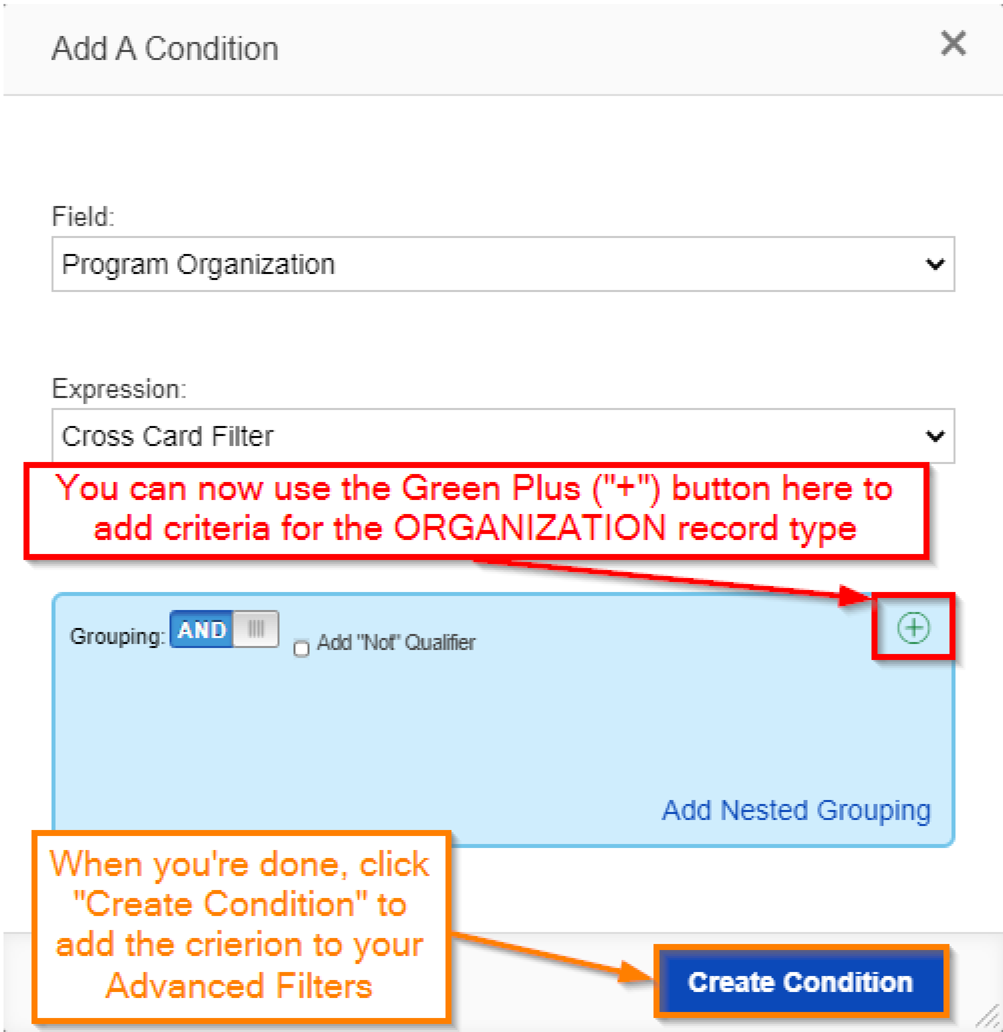
To start, head over to **Advanced Filters** and click on the **Green Plus Button** in order to add a new criterion to the filters. Please see also the screenshot below.



From the "**Add a Condition**" screen that pops up, you should select a field that serves as a **linkage** to another record type. For this example, I'll be using **P rogram Organization**, which is the field that links the **Application/Grant Record** back to the **Organization that is requesting said grant**. Once you've selected a **Field** that serves as a "**Linkage**" to another record type, open up the "**Expression**" dropdown menu and select "**Cross Card Filter**" from among the options. Please also see the screenshot below for visual instructions on how to do this.



Once you've selected "**Cross Card Filter**," a blue box similar to the one seen for **Advanced Filters** will appear allowing you to add criteria, change groupings, add "Not" qualifiers, etc. Now, you can add the criterion "**City**," use the Expression of "Equals" and enter in the text "**Milwaukee**." Once you click "**Create Condition**" and then "**Save**" from the **Advanced Filters** screen, the system will filter down the Application/Grant records to only those whose requesting Organization is based out of the city of Milwaukee.

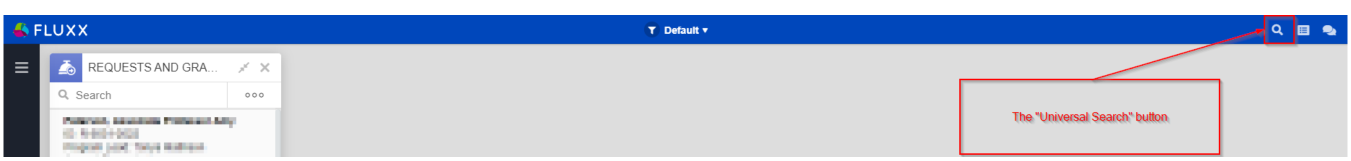


Universal Search

This search is an advanced search that does **NOT** limit itself to only one record type.

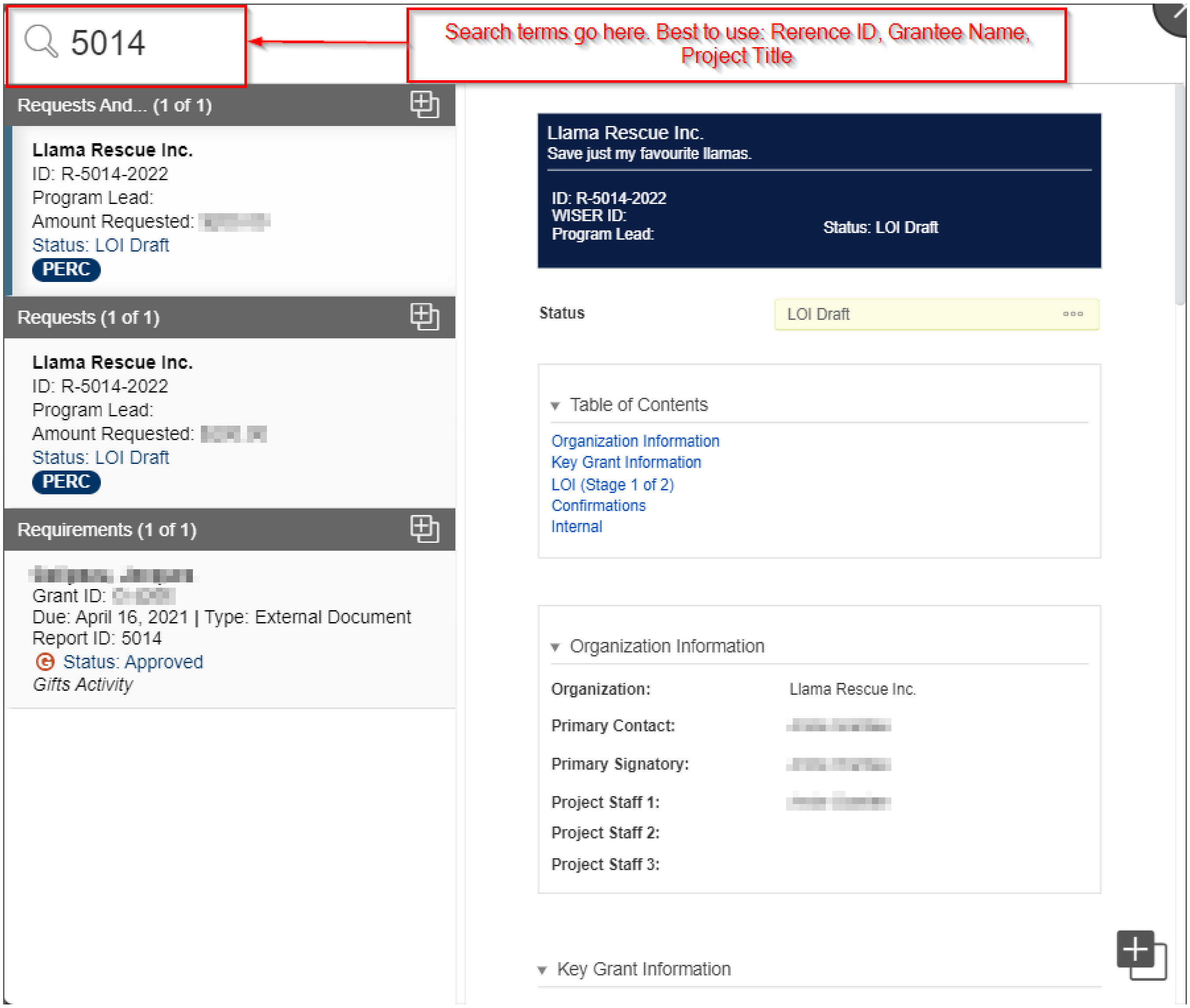
Universal Search – Allows you to search *every record in the system at once* for key words/IDs, names, etc. Very powerful for certain queries, but don't rely upon it for more complexes searches/to find records based off a certain criteria (i.e. something that can't be done easily in Universal Search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

Screenshot below for how to open the Universal Search bar:



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 it's ID (requirement ID) is also 5014.



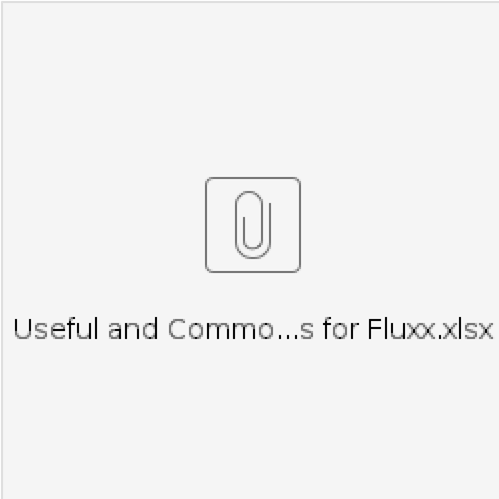
Ad-Hoc Reports

Ad-Hoc Reports are reports that we create that can be run on the fly, at any time, by any employee within the Fluxx system. Unlike filters or the Universal Search, these reports will NOT just show you records in the system; instead, Ad-Hoc Reports generate **Excel** or **CSV** files for which you can configure the Filters, the Columns, and the Groupings of the records returned. These reports are flexible and allow for us to add data from different record types all onto one report.

Before You Begin...

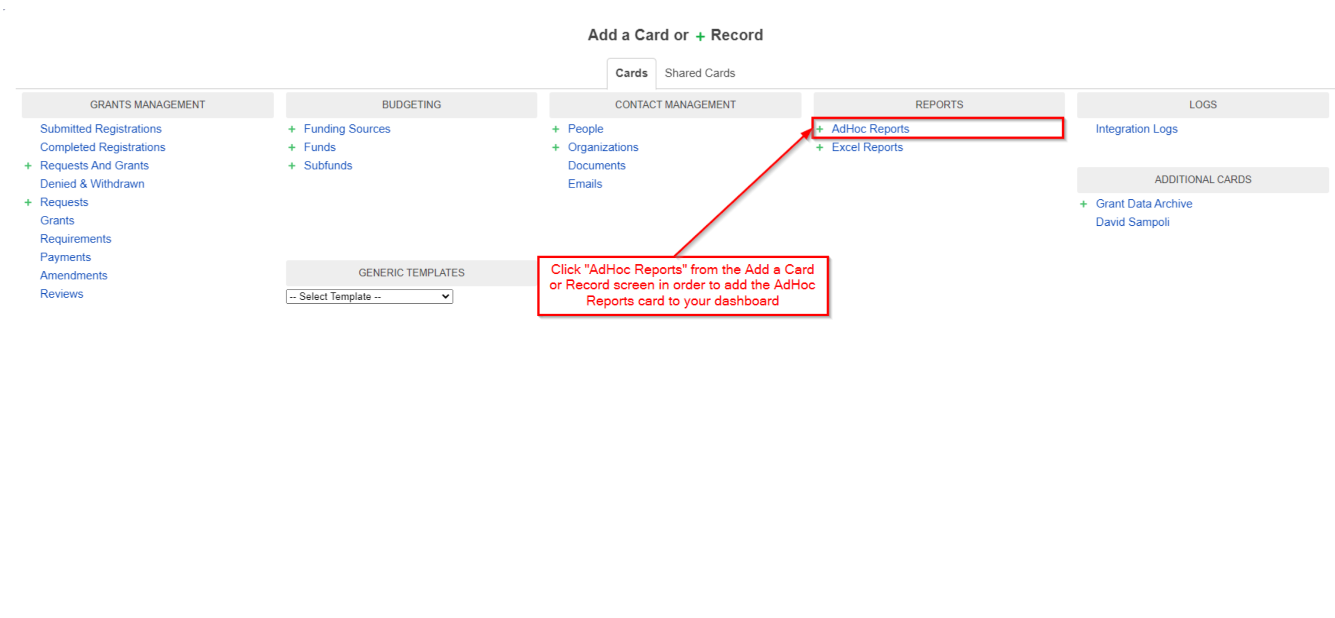
Fluxx has a great article regarding all things Ad-Hoc Reports related. Please see that article here: https://fluxxdev.atlassian.net/servicedesk/customer/portal/1/article/1795951277?src=-372247987

When using **Ad-Hoc Reports**, you'll need to know what the column names for important fields are. Please see the Excel sheet linked below to find important and frequently used columns in Fluxx and what they do.

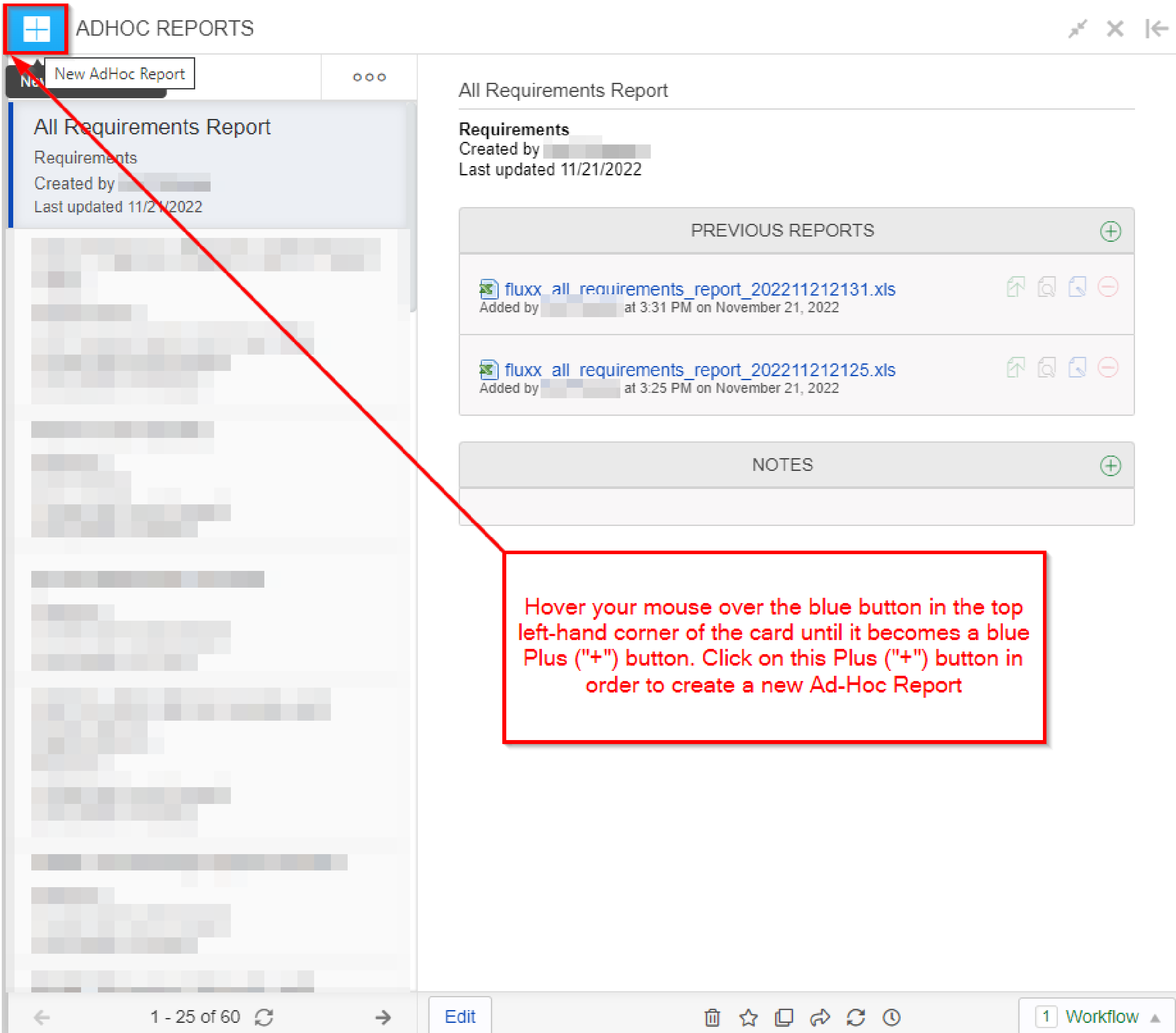


Managing Ad-Hoc Reports

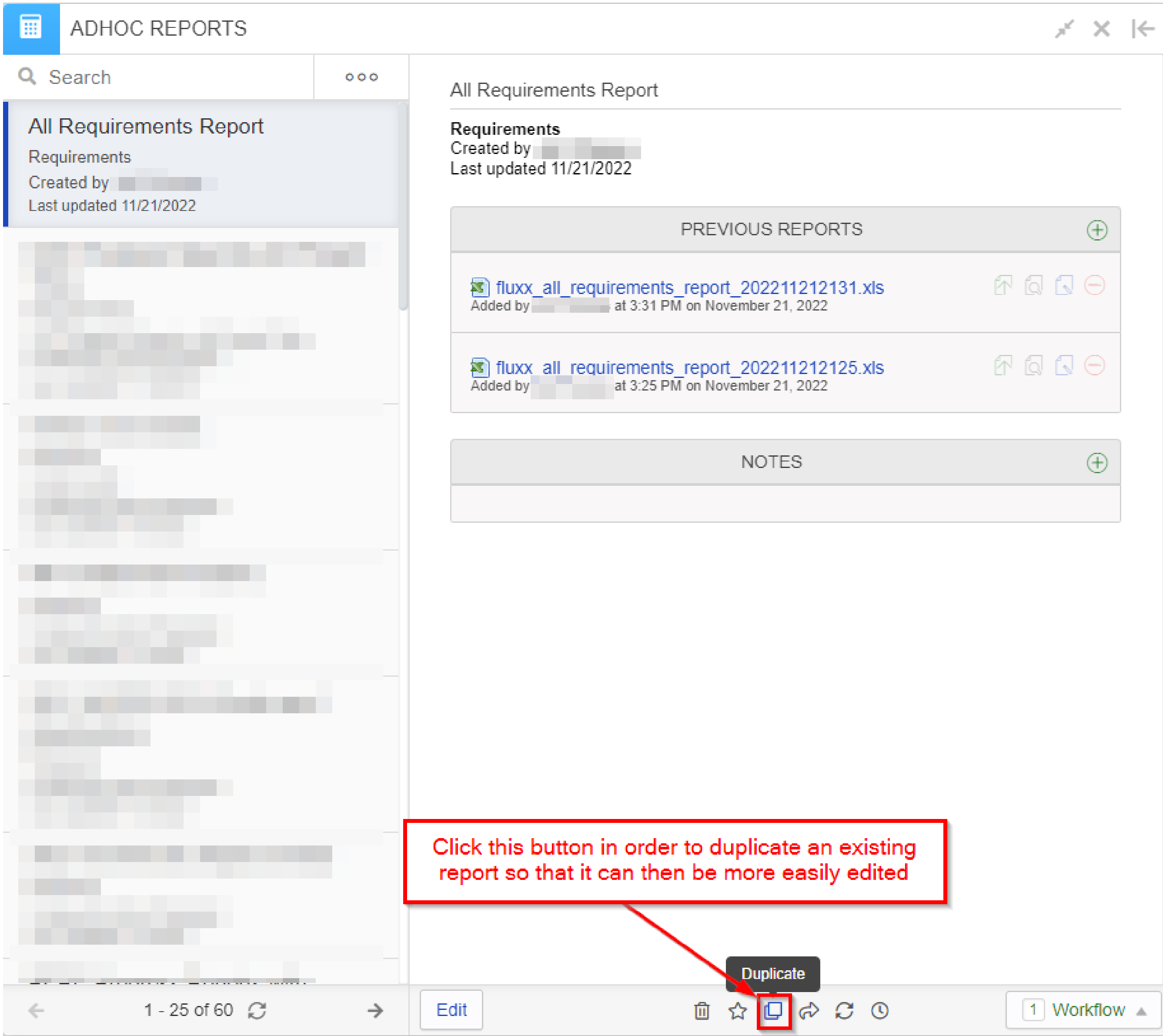
To begin creating an **Ad-Hoc Report** (or to begin editing one), first start by going to the **Add a Card or Record** screen. Please see the screenshot below for more information on this.



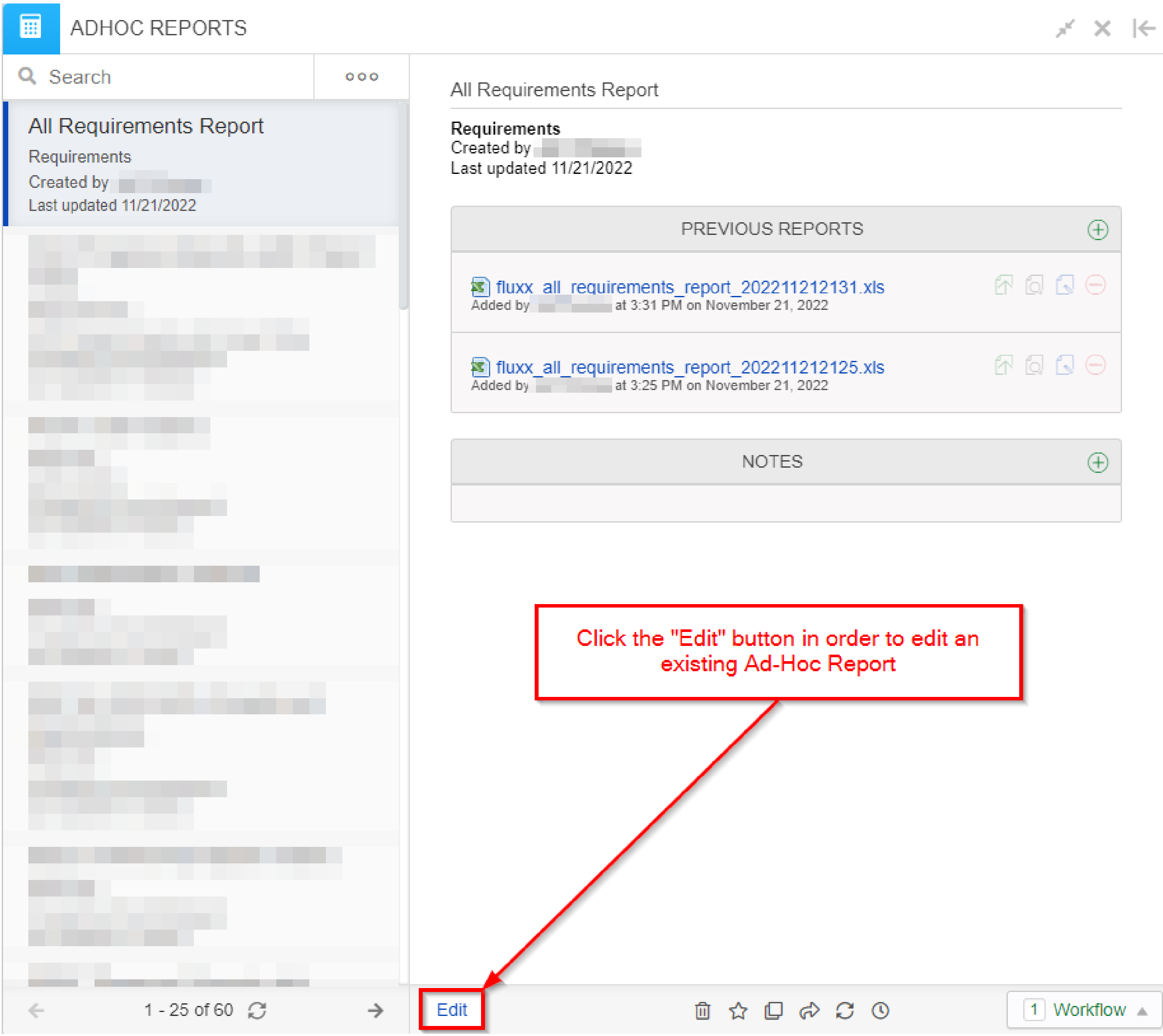
In order to create a new **Ad-Hoc Report**, hover your mouse button over the top left-hand corner of the card until the blue image becomes a blue **Plus** ("+") button. Click on this **Plus** button in order to create a new **Ad-Hoc Report**. Please see also the screenshot below for visual instructions.



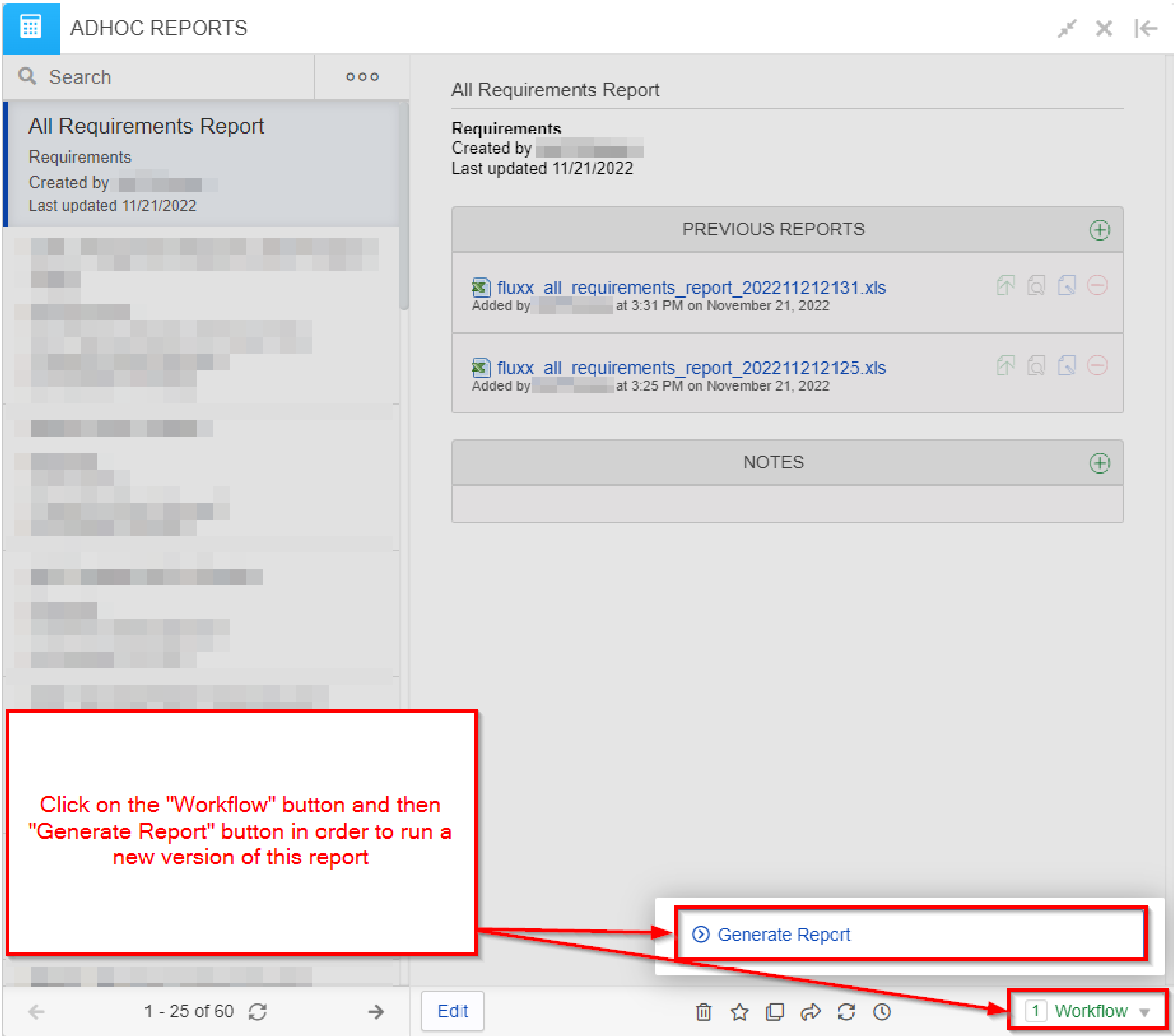
In order to **duplicate** an existing report for easier editing/changes, click on the report you want to duplicate from the report list and then find and click on the icon highlighted in the screenshot **below** in order to duplicate said report.



If you need to edit an existing report, you can click on the "**Edit**" button in the bottom left-hand corner of the card. Please also see the screenshot below.

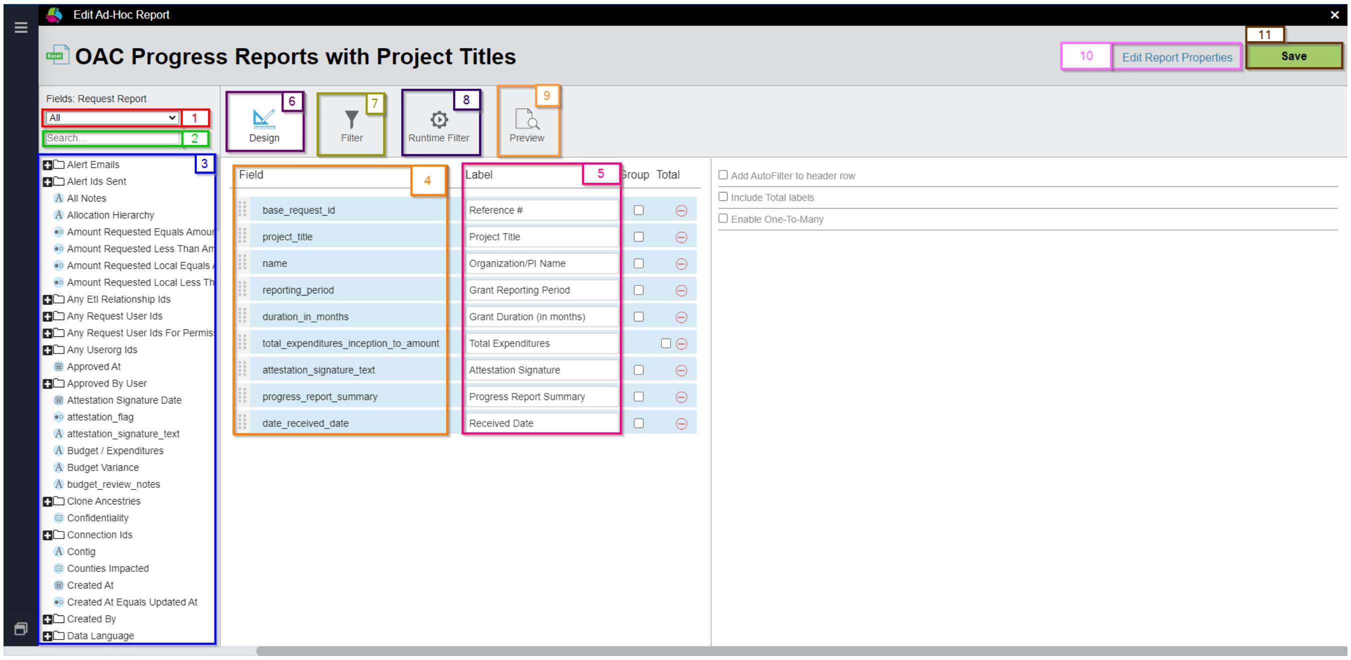


Finally, in order to run an **Ad-Hoc Report**, you should click on the "**Workflow**" button in the bottom right-hand corner of the card and then then "**Generate Report**" button from the menu that pops up.



Creating or Editing an Ad-Hoc Report

Hitting the blue Plus ("+") button OR the **edit** button on the Ad-Hoc Report card will bring you to another screen that looks like the one in the screenshot below. Please see the screenshot below for highlighted, important items from the **Edit Ad-Hoc Reports** screen and beneath the screenshot for descriptions of said items.



1. **Box # 1**: Shows which **columns** are currently displayed. By default this will sometimes be only **Recommended** columns; I recommend **always** switching this dropdown menu to display "**All**" columns (as shown in the screenshot above).
2. **Box # 2**: Shows where you can **search** for specific columns using a search term. Please be sure to use the Excel sheet linked from this article to find the names for commonly used columns; some column names are quite odd and unexpected.
3. **Box # 3**: Shows the list of possible columns to choose from for this report. Drag from this portion of the screen to the **Field** section (Boxes # 4 and 5 from the screenshot above) in order to add a specific column to the Ad-Hoc Report.
4. **Box # 4**: Shows the internal **column name** of the columns already selected from this report.
5. **Box # 5**: Shows the **Label** that is **configurable** for every column that you add to your report. This way, you can make the report more legible for end-users. For example, we usually change the label of the column "Base Request" or "base_request_id" to be "**Reference Number**" since that is the name that WPP is used to.
6. **Box # 6**: Shows the **Design** tab as currently selected. This where you **design** the columns of the report in question.
7. **Box # 7**: Shows the **Filter** tab. This allows you to have standing **filters** on this report so that it doesn't return EVERY record for this record type. Ad-Hoc Reports can use both **Basic** and **Advanced Filters** as you would be able to do for a normal card. Those won't be covered again here as they are covered earlier in this guide.
8. **Box # 8**: Allows you to add **Run-Time Filters**. These are different from normal filters. Normal filters (both of the **Basic** and **Advanced** variety) will ALWAYS be applied to this report whenever it is run. **Run-Time Filters**, on the other hand, will prompt the user for **values to search for for the specific Run-Time Criterion** you have entered. For example, a common **Run-Time Filter** to use is **Status**. Every time someone goes to run an Ad-Hoc Report that has a **Status** Run-Time Filter, a screen will pop up asking the user trying to run the report to enter in the statuses for which they would like to return the records with said statuses.
9. **Box # 9**: When clicked, will show you a **Preview** of how the report will look when it is run. Useful for checking that you are using a column that is actually populated or for checking if your filters will actually return any data.
10. **Box # 10**: Shows the **Edit Report Properties** button; when you click this button, you will be given the option to change the Report's name, description, and type (.xlsx or .csv).
11. **Box # 11**: Shows the **Save** button. Clicking this button will save what you have done to the report and bring you back to the **Ad-Hoc Report** card, from where you can run your newly created report.