

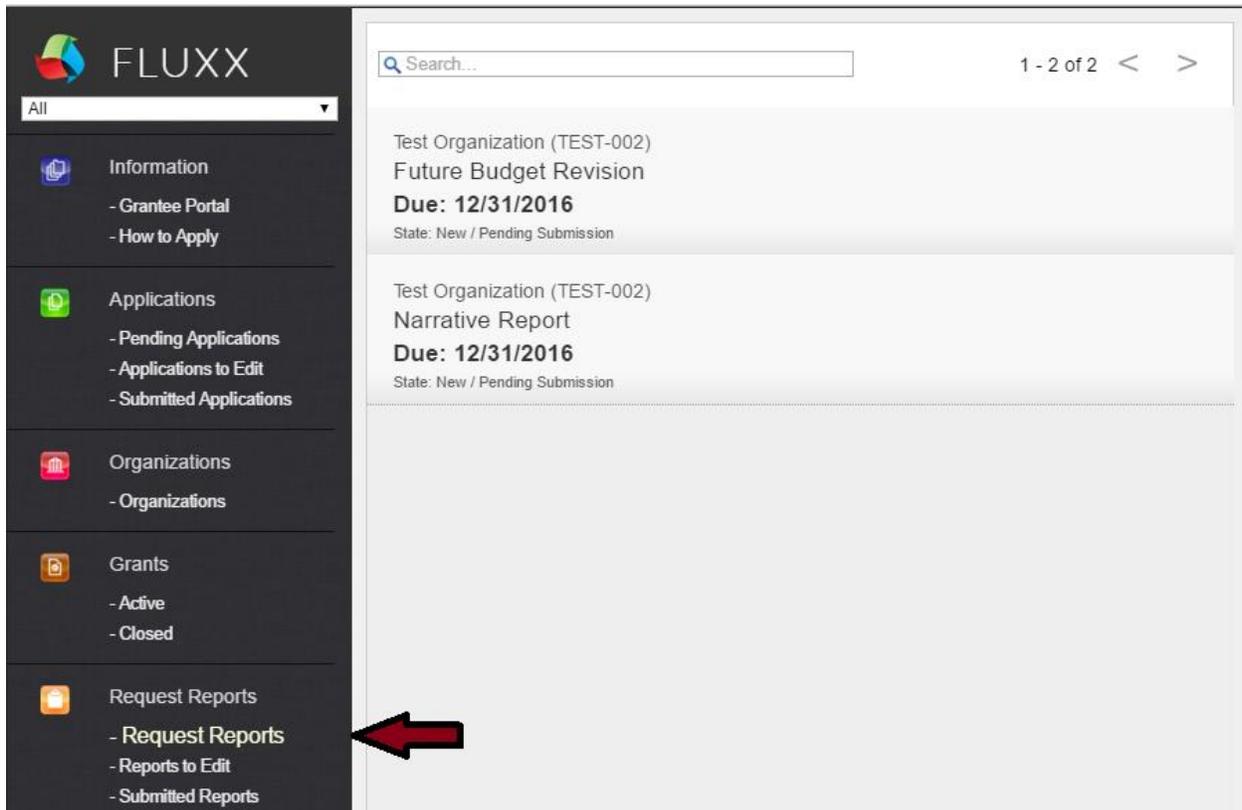
Submitting Reports in the Fluxx System

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Narrative Report Submission

- The Narrative Report submission process has changed from our previous system. Now the narrative information should be entered directly into an online form, and should no longer be uploaded as a separate document. If you have miscellaneous materials to be uploaded, you can do so under the Requirement Documents section at the bottom of the form by clicking on the green button with the plus sign, **but these materials will NOT be accepted in lieu of completing the online narrative report form.**
- Within the Grantee portal, click “Request Reports” on the left-hand side of the screen. The list of outstanding reports will be in chronological order by due date.



- Please be certain to select the Narrative Report for the specific grant and grant year, and click on that link (there may be several if you have a multi-year grant). You will then see the form you will need to complete. At the top of the form, click the Edit button. This will open up the form with text boxes.

The screenshot displays the FLUXX web application interface. On the left is a dark sidebar with the FLUXX logo and a navigation menu. The main content area is white and contains a form titled "Narrative Report". At the top of the form, there are three buttons: "Edit", "Printable", and "Submit". A red arrow points to the "Edit" button. Below the buttons, a green message says "Save frequently during report process". The form title "Narrative Report" is centered. Below the title, the "Due On:" date is 12/31/2016, and the "Approved On:" field is empty. A yellow warning box contains the text "Please note:" followed by five bullet points, each with a warning triangle icon, stating that questions 1(a), 1(b), 2, 3(a), 3(b), and 4 require answers. Below the warning box, there is a paragraph of instructions: "All required questions must contain text before the system will save your answers. If you would like to save and complete your report later, please put placeholder text (such as 'to be completed') for the unanswered questions to allow the system to save your completed answers." At the bottom, another paragraph states: "If you have miscellaneous materials to be uploaded, you can do so under the Requirement Documents section at the bottom of the form by clicking on the green button with the plus sign, but these materials will not be accepted in lieu of completing the online narrative report".

FLUXX

All

Information
- Grantee Portal
- How to Apply

Applications
- Pending Applications
- Applications to Edit
- Submitted Applications

Organizations
- Organizations

Grants
- Active
- Closed

Request Reports
- Request Reports
- Reports to Edit
- Submitted Reports

← Edit Printable Submit

Save frequently during report process

Narrative Report

Due On: 12/31/2016

Approved On:

Please note:

- ⚠ Question 1.(a) requires an answer.
- ⚠ Question 1.(b) requires an answer.
- ⚠ Question 2 requires an answer.
- ⚠ Question 3.(a) requires an answer.
- ⚠ Question 3.(b) requires an answer.
- ⚠ Question 4 requires an answer.

All required questions must contain text before the system will save your answers. If you would like to save and complete your report later, please put placeholder text (such as "to be completed") for the unanswered questions to allow the system to save your completed answers.

If you have miscellaneous materials to be uploaded, you can do so under the Requirement Documents section at the bottom of the form by clicking on the green button with the plus sign, but these materials will not be accepted in lieu of completing the online narrative report

- You can either type directly into those boxes or copy and paste text into them from another source. The yellow box will clarify which questions on this form require a response. Also, please be aware that if you use either the “less than” or “greater than” symbols (< or >) in the text boxes, you must put a space both before and after the symbol or your text may not be visible after you save it. **Please be sure to save your report frequently, as this system will log you out after 30 minutes of inactivity.**

The screenshot displays the FLUXX web application interface. On the left is a dark sidebar with the FLUXX logo and a navigation menu with categories: Information (Grantee Portal, How to Apply), Applications (Pending Applications, Applications to Edit, Submitted Applications), Organizations (Organizations), Grants (Active, Closed), Request Reports (Request Reports, Reports to Edit, Submitted Reports), and Payments (Scheduled Payments, Payments Paid). The main content area has a top bar with 'Cancel', 'Save', and a dropdown menu. A green message reads 'Save frequently during report process'. Below is the 'Narrative Report' form with 'Due On' (12/31/2016) and 'Approved On' fields. A yellow 'Please note' box contains a list of five questions requiring answers, with a red arrow pointing to the second item. Below this is explanatory text about saving and uploading materials. The 'Narrative Information' section includes a paragraph and a sub-section '1. PROGRESS TOWARD PROJECT GOALS.' with a text input field containing 'Enter text here.' and a red arrow pointing to it.

- If you have other materials you would like to attach related to your narrative report (e.g., brochures, publications, etc.), you can attach them at the bottom of the page by clicking the green plus sign and uploading them from your computer.

The screenshot shows a web application interface. On the left is a dark sidebar menu with the following sections:

- Applications** (green icon):
 - Pending Applications
 - Applications to Edit
 - Submitted Applications
- Organizations** (red icon):
 - Organizations
- Grants** (orange icon):
 - Active
 - Closed
- Request Reports** (orange icon):
 - Request Reports
 - Reports to Edit
 - Submitted Reports
- Payments** (purple icon):
 - Scheduled Payments
 - Payments Paid

At the bottom of the sidebar are links for "Change Password" and "Logout".

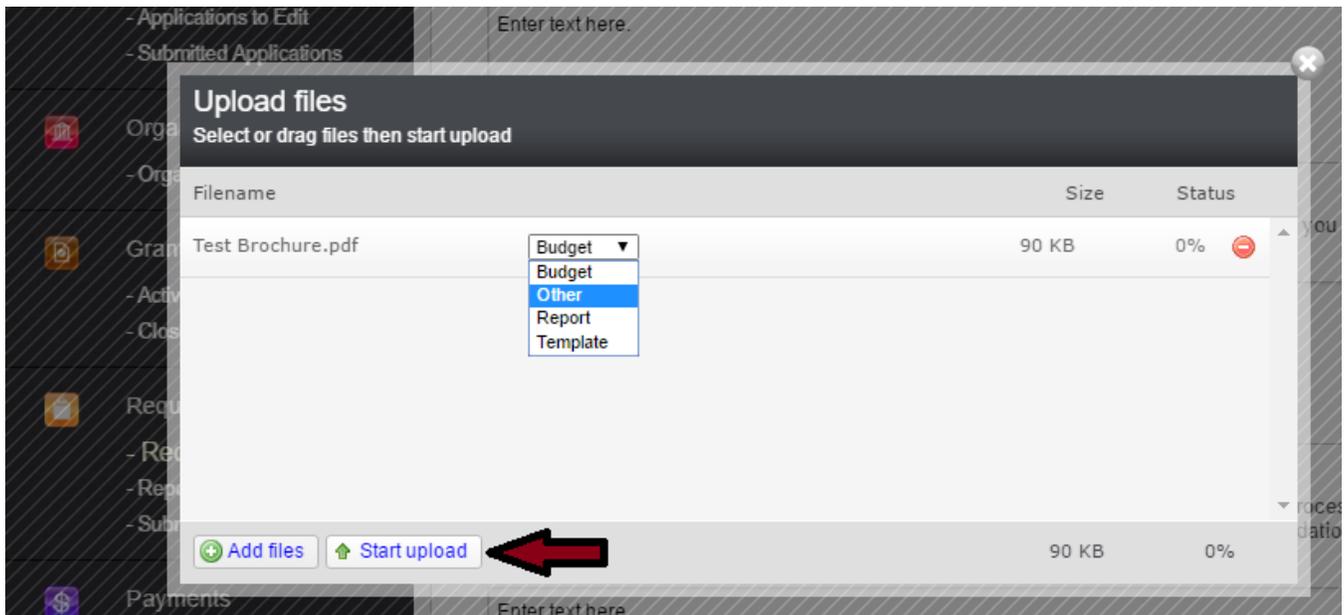
The main content area contains several text input fields with the placeholder text "Enter text here.":

- Field 1: (7) Summarize progress toward project outcomes (i.e., what results were expected if the project [or phases of the project] was successful?) and include key evaluation results related to the funded grant project. [If possible, attach the most recent evaluation report of results and/or findings.]
- Field 2: 4. SUSTAINABILITY. What have you done to further the sustainability of the project? [OPTIONAL: What do you plan to do during the next grant period to promote sustainability?]
- Field 3: 5. FEEDBACK ABOUT INTERACTIONS WITH THE FOUNDATION. Provide feedback about the Hogg Foundation's grantmaking and grant management process. What worked and what didn't work about your organization's interactions with the foundation, required meetings, reports, etc.?
- Field 4: 6. ADDITIONAL INFORMATION. Please include any additional information you would like us to know.

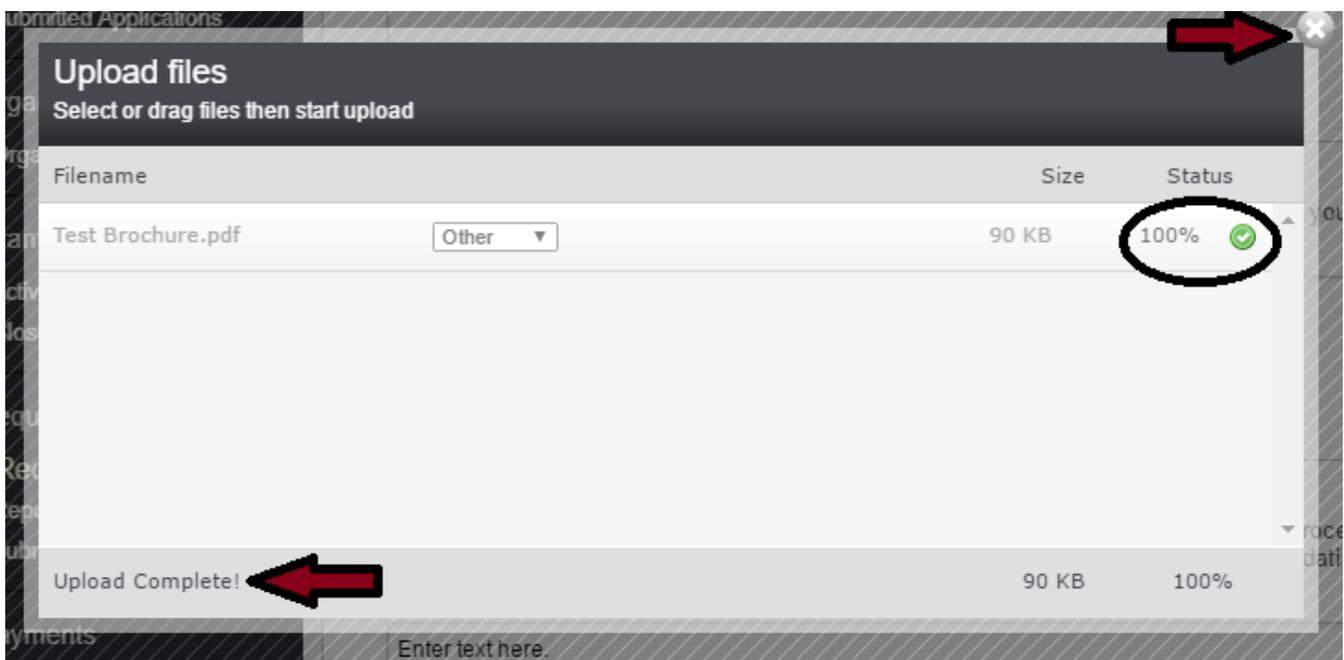
At the bottom of the main content area is a grey bar labeled "REQUIREMENT DOCUMENTS" with a green plus icon to its right, which is highlighted by a red arrow.

The screenshot shows a "Upload files" dialog box. The dialog has a title bar with a close button (X) and a subtitle "Select or drag files then start upload". Below the subtitle is a table with the following columns: "Filename", "Size", and "Status". The table is currently empty, with the text "Drag files here." centered below it. At the bottom of the dialog are two buttons: "Add files" (with a green plus icon) and "Start upload" (with an upward arrow icon). A red arrow points to the "Add files" button.

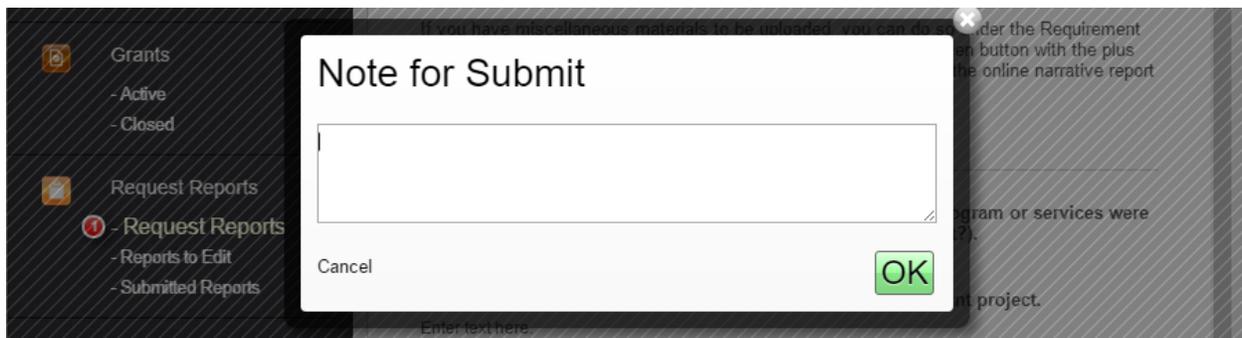
- After attaching any additional files, select Other from the drop-down menu and click “Start upload”. If you are adding multiple files, they must be added one at a time, but can be uploaded all at once.



- The upload is complete when you see “Upload Complete!” in the bottom left-hand corner of the Upload files box and the Status shows 100% with a green checkmark to the right. You can then close the Upload box by clicking the white “X” in the upper right-hand corner.



- After you have answered all the required questions and uploading any additional materials to your report, save it for the final time, and click the green Submit button at the top of the page. A box with “Note for Submit” will pop up, giving you the opportunity to provide brief information about the document you’ve uploaded if you so choose to, however, you are not required to enter anything in that box. Click “OK” to complete submission of your narrative requirement.



Fiscal Report Submission

- Fiscal Reports are uploaded in an Excel spreadsheet template that we provide you.
- To access your fiscal report template, within the Grantee portal, click “Request Reports” under “Request Reports” on the left-hand side of the screen and select the report for the grant period you are reporting on.

The screenshot shows the FLUXX Grantee Portal interface. On the left is a dark sidebar with a navigation menu. The 'Request Reports' section is selected, and a red arrow points to it. The main content area displays a list of reports for 'Test Organization (TEST-002)'. The reports are: 'Future Budget Revision', 'Fiscal Report', and 'Narrative Report'. Each report has a 'Due: 12/31/2016' and 'State: New / Pending Submission'. A red arrow points to the 'Fiscal Report' entry.

- In the Requirement Documents section, you should see a file with the word “Template” below the file name. Clicking on that link will allow you to download the template to your computer.

The screenshot shows the 'Fiscal Report' detail page in the FLUXX Grantee Portal. At the top right are buttons for 'Edit', 'Printable', and 'Submit'. The page title is 'Fiscal Report'. Below the title, it shows 'Due On: 12/31/2016' and 'Approved On:'. A message states: 'Please attach the Fiscal Report to the below "Requirement Documents" section.' Below this is a 'REQUIREMENT DOCUMENTS' section containing a file named 'TEST-001 2016 Fiscal Report.xlsx'. Below the file name is the word 'Template' and the text 'Added by Mary Admin at 10:21 AM on April 13, 2016'.

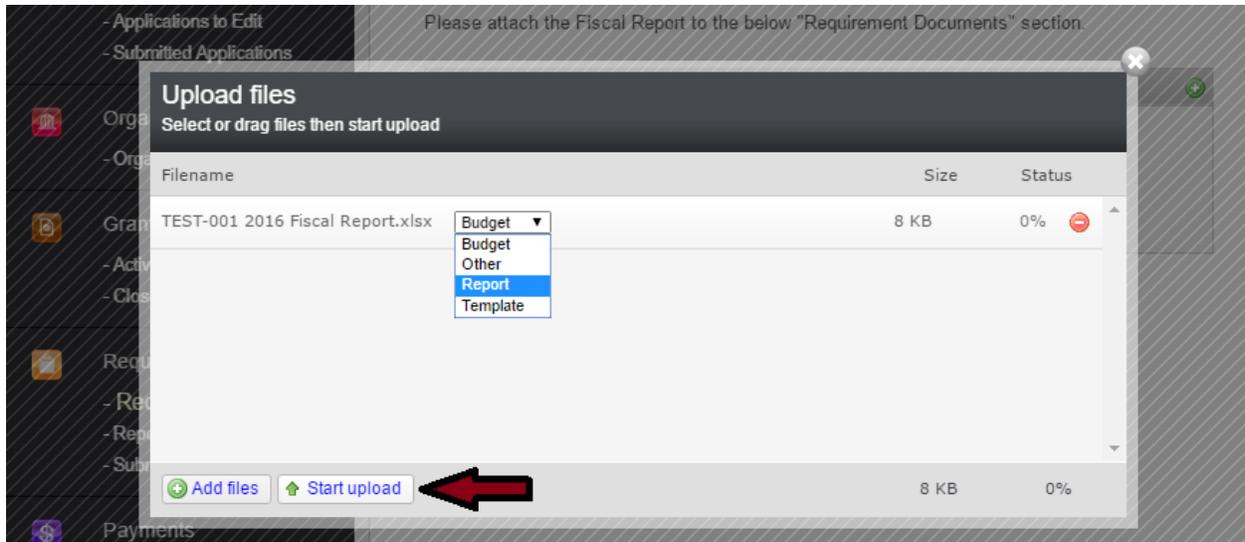
- Enter your expenditures from the grant period you are reporting on into the spreadsheet. Please utilize the Narrative column to explain all variances in expenditures, whether over-expenditures or under-expenditures.
- Please DO NOT change the formulas, fields, or the template other than entering expenditures and variances.
- Once complete, please save the file (using the same file name) in Excel format, not as a PDF.
- Return to the “Request Reports” section of the Fluxx Grantee portal where you downloaded your template. Again, select the link for the specific grant and grant year you are reporting on.
- Click the green button with the plus sign in the Requirement Documents box.

The screenshot displays the FLUXX Grantee Portal interface. On the left is a dark sidebar with the FLUXX logo and a navigation menu including Information, Applications, Organizations, and Grants. The main content area is titled 'Fiscal Report' and includes a 'Due On: 12/31/2016' and 'Approved On:' field. Below this, a text instruction reads 'Please attach the Fiscal Report to the below "Requirement Documents" section.' A 'REQUIREMENT DOCUMENTS' box contains a green plus button, which is highlighted by a red arrow. Below the plus button, a file entry is shown: 'TEST-001 2016 Fiscal Report.xlsx', Template, Added by Mary Admin at 10:21 AM on April 13, 2016. At the top right of the main content area are buttons for 'Edit', 'Printable', and 'Submit'.

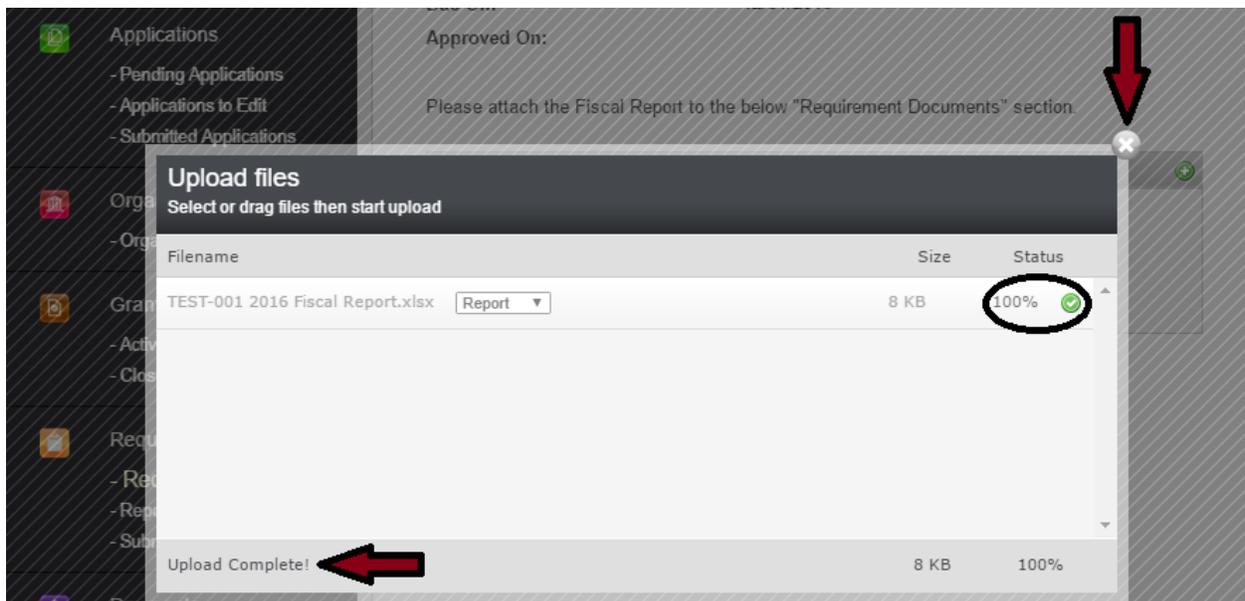
- You will then see the Upload files box.

The screenshot shows an 'Upload files' dialog box overlaid on the portal. The dialog has a title bar 'Upload files' and a subtitle 'Select or drag files then start upload'. It contains a table with columns 'Filename', 'Size', and 'Status'. The table is currently empty with the text 'Drag files here.' in the center. At the bottom of the dialog are two buttons: 'Add files' and 'Start upload'.

- Click the “Add files” button to select the completed fiscal report on your computer. From the drop-down menu, select Report. Click “Start Upload”.



- The upload is complete when you see “Upload Complete!” in the bottom left-hand corner of the Upload files box and the Status shows 100% with a green checkmark to the right. You can then close the Upload box by clicking the white “X” in the upper right-hand corner.



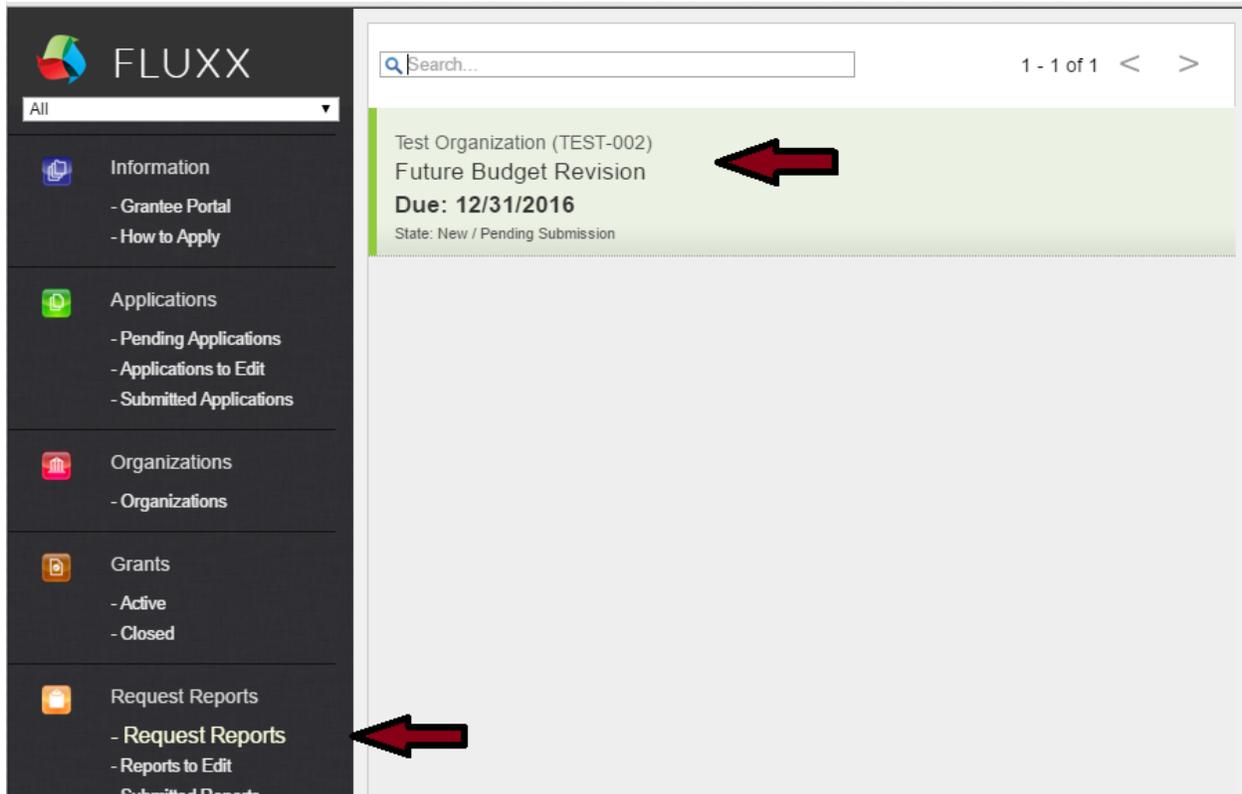
- You will then see both the original template and the report you just uploaded in the Requirement Documents section. Click the green “Submit” button at the top right-hand side of the page to submit your fiscal report. A box with “Note for Submit” will pop up, giving you the opportunity to provide brief information if you so choose, but you are not required to enter anything in it. Please click “OK” to complete submission of your fiscal report.

The screenshot shows the FLUXX web application interface. On the left is a dark sidebar with navigation options: Information (Grantee Portal, How to Apply), Applications (Pending Applications, Applications to Edit, Submitted Applications), Organizations (Organizations), Grants (Active, Closed), and Request Reports (Request Reports). The top navigation bar contains a back arrow, 'Edit', 'Printable', and a green 'Submit' button. A red arrow points to the 'Submit' button. The main content area is titled 'Fiscal Report' and shows 'Due On: 12/31/2016' and 'Approved On:'. Below this is a section titled 'REQUIREMENT DOCUMENTS' containing two entries: 'TEST-001 2016 Fiscal Report.xlsx' (Report, Added by Test2 Grantee at 11:08 AM on April 13, 2016) and 'TEST-001 2016 Fiscal Report.xlsx' (Template, Added by Mary Admin at 10:21 AM on April 13, 2016).

This screenshot shows a 'Note for Submit' dialog box overlaid on the application. The dialog box has a title bar with 'Note for Submit' and a close button. It contains a large text input field for a note, a 'Cancel' button, and a green 'OK' button. The background is dimmed, showing the 'REQUIREMENT DOCUMENTS' section with the 'TEST-001 2016 Fiscal Report.xlsx' (Report) entry.

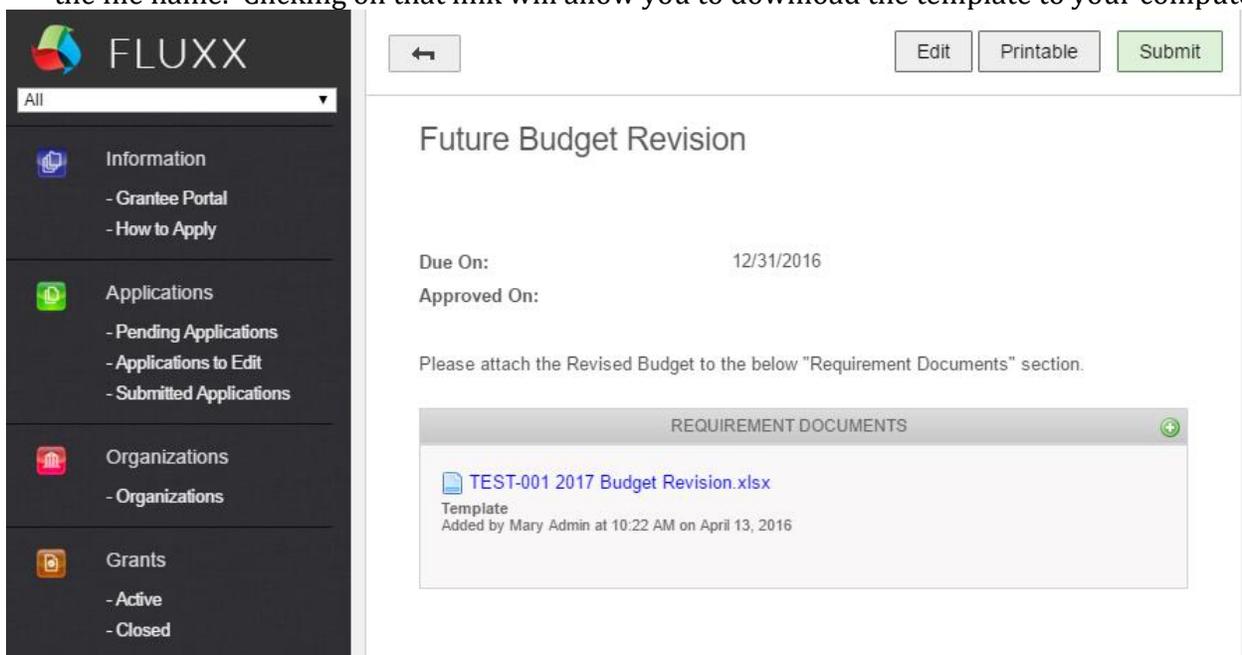
Budget Change Request Submission

- As with fiscal reports, budget change requests are uploaded in an Excel spreadsheet template that we provide you.
- To access your budget template, within the Grantee portal, click “Request Reports” under “Request Reports” on the left-hand side of the screen and select the report for the grant period you are reporting on.



The screenshot shows the FLUXX Grantee Portal interface. On the left is a dark sidebar with a navigation menu. The 'Request Reports' section is highlighted with a red arrow pointing to it. The main content area shows a list of reports for 'Test Organization (TEST-002)'. The report 'Future Budget Revision' is highlighted in green and has a red arrow pointing to it. The report details include 'Due: 12/31/2016' and 'State: New / Pending Submission'. A search bar and pagination controls are visible at the top of the main content area.

- In the Requirement Documents section, you should see a file with the word “Template” below the file name. Clicking on that link will allow you to download the template to your computer.



The screenshot shows the 'Future Budget Revision' report details page in the FLUXX Grantee Portal. The sidebar is visible on the left. The main content area has a title 'Future Budget Revision' and buttons for 'Edit', 'Printable', and 'Submit'. Below the title, the 'Due On:' date is '12/31/2016' and 'Approved On:' is blank. A message states: 'Please attach the Revised Budget to the below "Requirement Documents" section.' Below this is a 'REQUIREMENT DOCUMENTS' section with a plus icon. It contains a file named 'TEST-001 2017 Budget Revision.xlsx' with the word 'Template' below it. The file was added by 'Mary Admin' at '10:22 AM on April 13, 2016'.

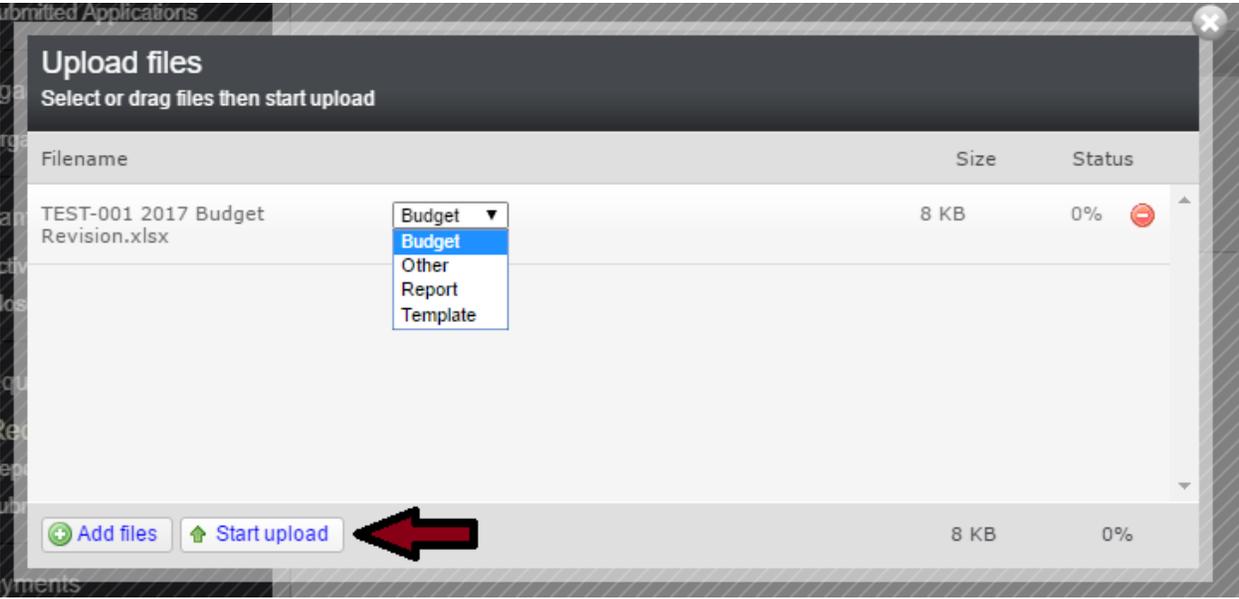
- Enter the proposed changes where appropriate into the spreadsheet. Please utilize the Narrative column to explain all requested changes.
- Please DO NOT change the formulas, fields, or the template other than entering proposed amount changes and variances.
- Once complete, please save the file (using the same file name) in Excel format, not as a PDF.
- Return to the “Request Reports” section of the Fluxx Grantee portal where you downloaded your template. Again, select the link for the specific grant and grant year you are reporting on.
- Click the green button with the plus sign in the Requirement Documents box.

The screenshot displays the FLUXX portal interface. On the left is a dark sidebar with the FLUXX logo and a navigation menu. The main content area is titled 'Future Budget Revision' and includes a 'Due On: 12/31/2016' field and an 'Approved On:' field. Below these fields is a text instruction: 'Please attach the Revised Budget to the below "Requirement Documents" section.' Underneath is a box labeled 'REQUIREMENT DOCUMENTS' which contains a file entry: 'TEST-001 2017 Budget Revision.xlsx', identified as a 'Template' added by 'Mary Admin' on 'April 13, 2016'. A red arrow points to a green plus sign button located in the top right corner of the 'REQUIREMENT DOCUMENTS' box.

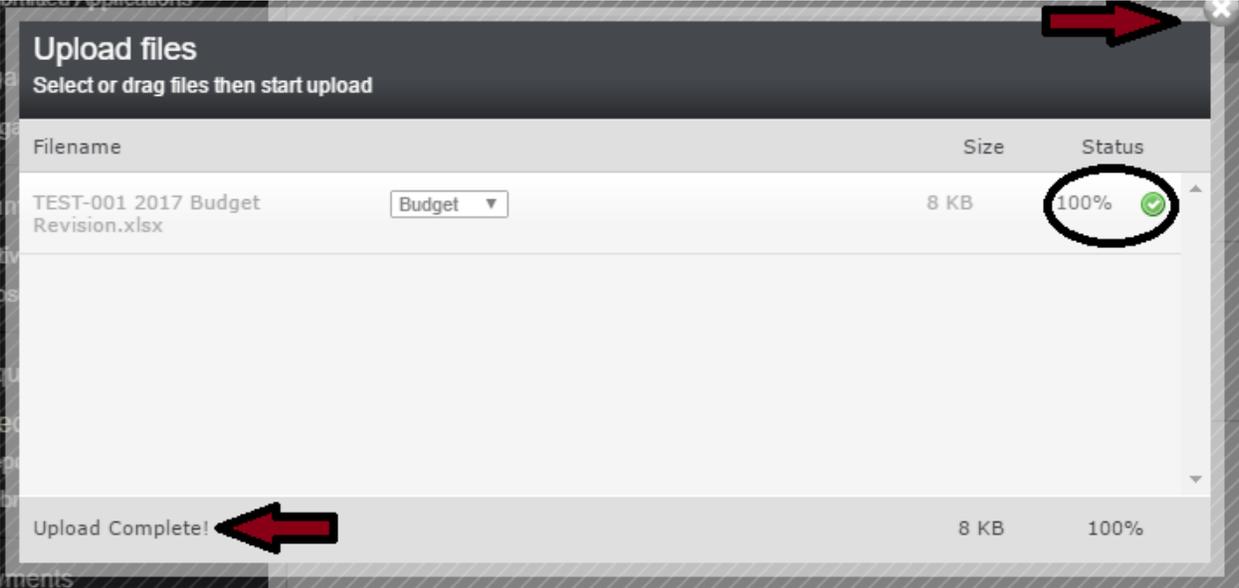
- You will then see the Upload files box.

The screenshot shows a modal dialog box titled 'Upload files'. The dialog contains the instruction 'Select or drag files then start upload'. Below this is a table with three columns: 'Filename', 'Size', and 'Status'. The table is currently empty and contains the text 'Drag files here.' Below the table are two buttons: 'Add files' (with a plus sign icon) and 'Start upload' (with an upload icon).

- Click the “Add files” button to select the completed budget revision document on your computer. From the drop-down menu, select Budget. Click “Start Upload”.



- The upload is complete when you see “Upload Complete!” in the bottom left-hand corner of the Upload files box and the Status shows 100% with a green checkmark to the right. You can then close the Upload files box by clicking the white “X” in the upper right-hand corner.



- You will then see both the original template and the report you just uploaded in the Requirement Documents section. Click the green “Submit” button at the top right-hand side of the page to submit your fiscal report. A box with “Note for Submit” will pop up, giving you the opportunity to provide brief information if you so choose, but you are not required to enter anything in it. Please click “OK” to complete your submission.

FLUXX

All

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- Grantee Portal
- How to Apply

Applications
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- Closed

Request Reports
- Request Reports
- Reports to Edit
- Submitted Reports

← Edit Printable **Submit**

Future Budget Revision

Due On: 12/31/2016
Approved On:

Please attach the Revised Budget to the below "Requirement Documents" section.

REQUIREMENT DOCUMENTS

TEST-001 2017 Budget Revision.xlsx
Budget
Added by Test2 Grantee at 10:39 AM on April 14, 2016

TEST-001 2017 Budget Revision.xlsx
Template
Added by Mary Admin at 10:22 AM on April 13, 2016

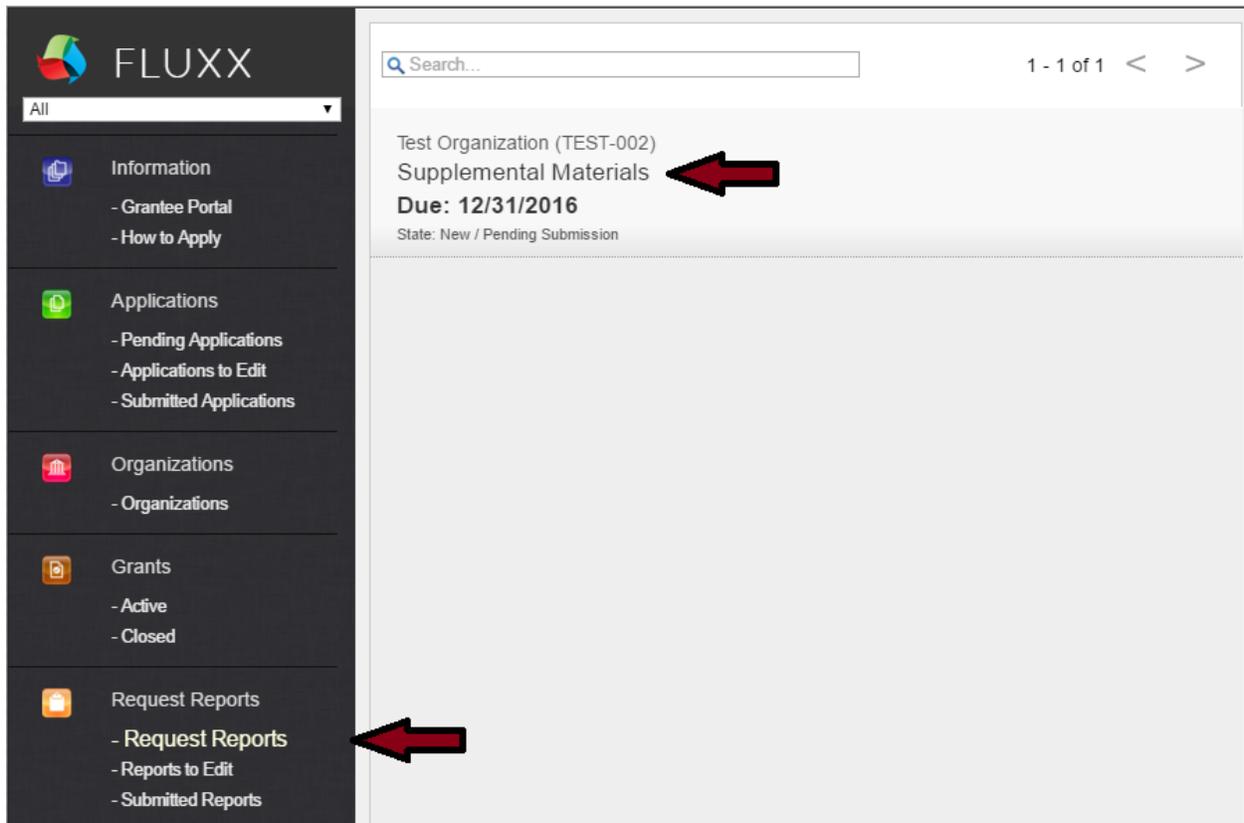
TEST-001 2017 Budget Revision.xlsx
Budget
Added by Test2 Grantee at 10:39 AM on April 14, 2016

Note for Submit

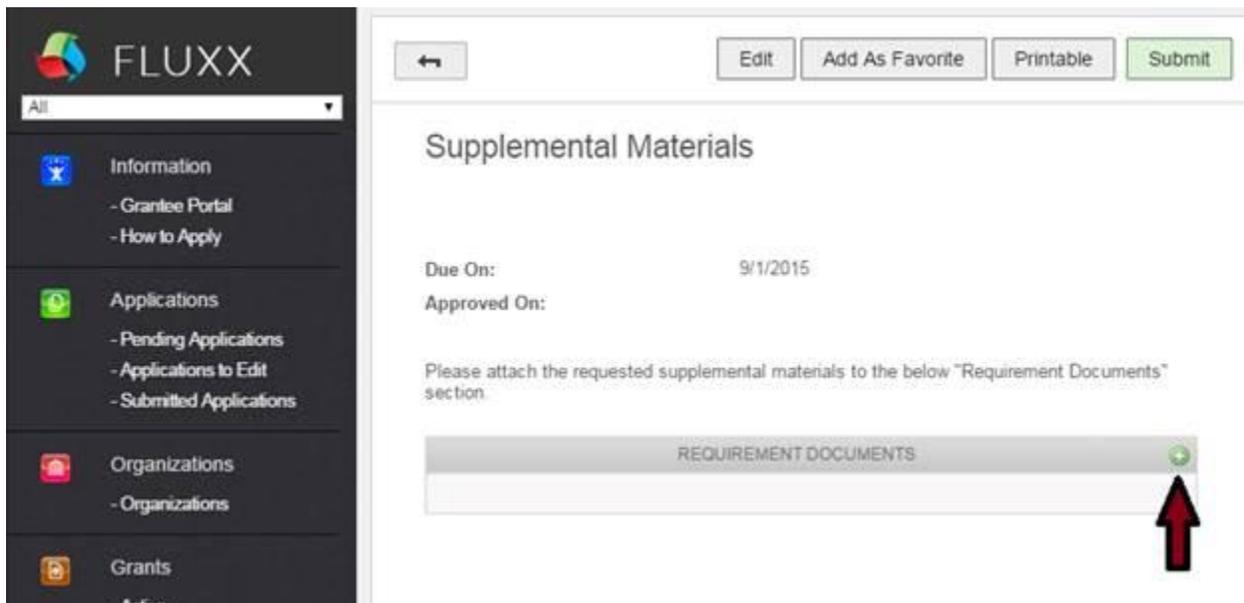
Cancel **OK**

Supplemental Materials Submission

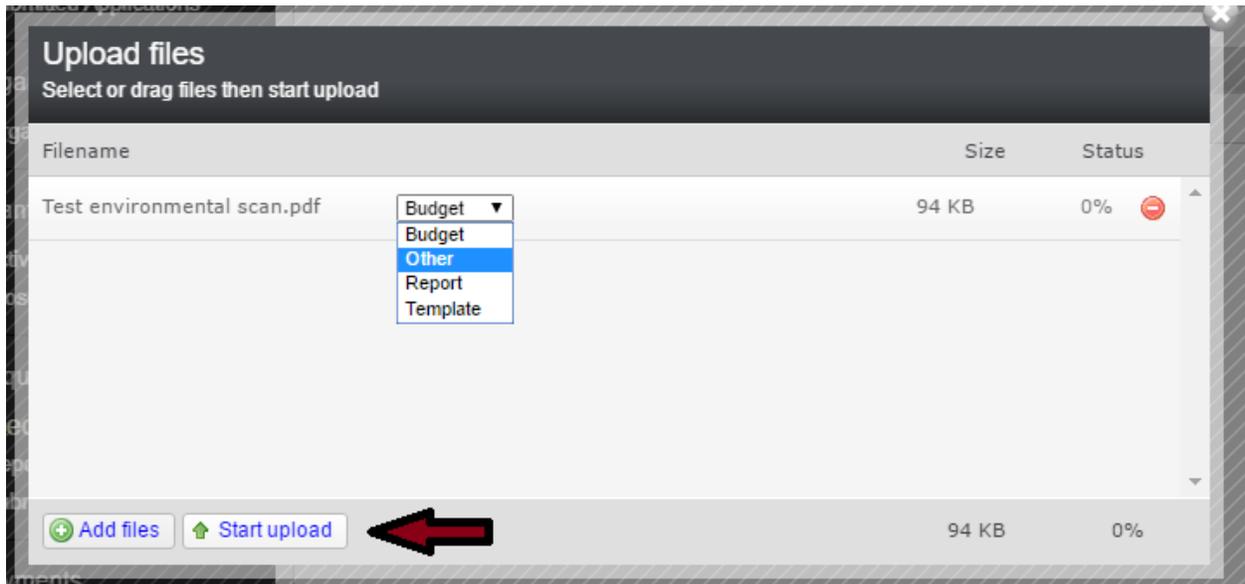
- Supplemental materials will each have their own report slot and are uploaded in a similar manner as Fiscal Reports.
- If supplemental materials (e.g., environmental scan or dissemination plan) have been requested, complete the required supplemental materials and save the files to your computer
- Return to the Fluxx Grantee portal and click “Request Reports” on the left-hand side of the screen. Click the Supplemental Materials for the specific grant and grant year for your report.



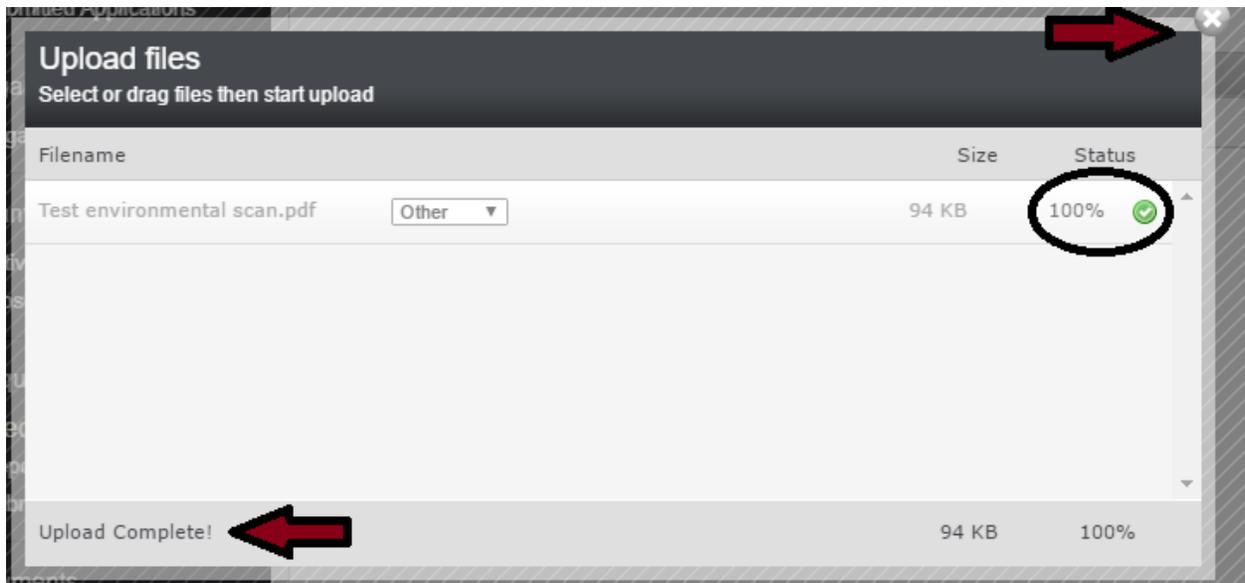
- Click the green button with the plus sign in the Requirement Documents box.



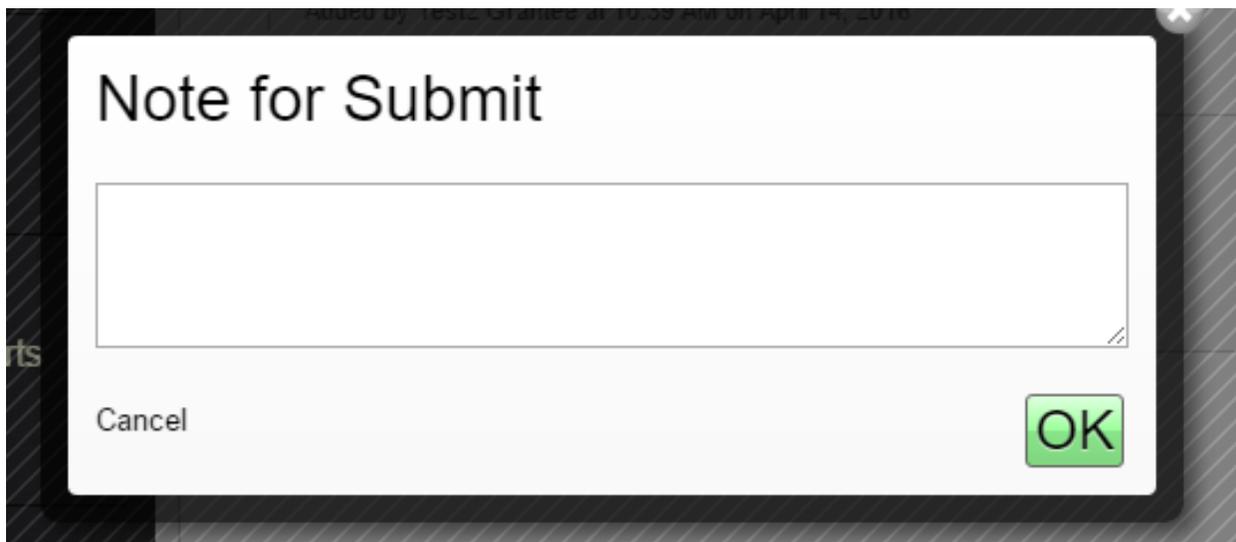
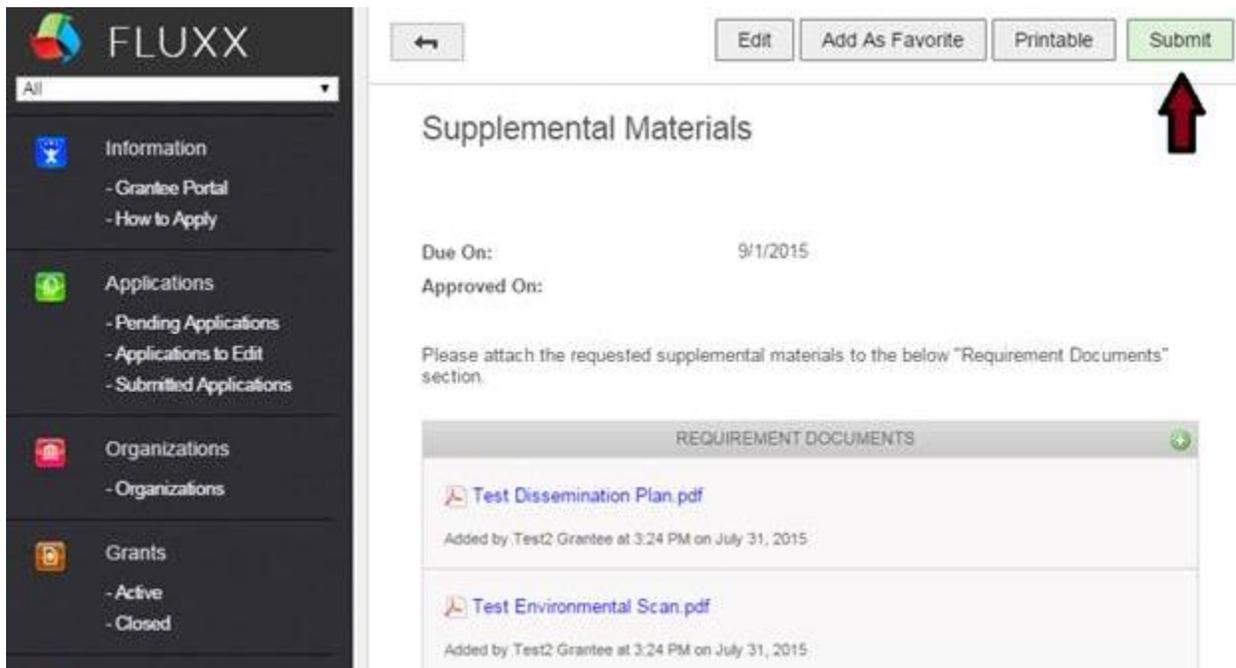
- Click the “Add files” button to select the supplemental material file(s) on your computer. From the drop-down menu, select Other. Click “Start Upload”. If you are adding multiple files, they must be added one at a time, but can be uploaded all at once.



- The upload is complete when you see “Upload Complete!” in the bottom left-hand corner of the Upload files box and the Status shows 100% with a green checkmark to the right. You can then close the Upload files box by clicking the white “X” in the upper right-hand corner.



- You will then see the documents you have uploaded into the Supplemental Materials section. Click the green “Submit” button at the top right-hand side of the page to submit your supplemental materials. A box with “Note for Submit” will pop up, giving you the opportunity to provide brief information if you so choose, but you are not required to enter anything in it. Please click “OK” to complete your submission.



Miscellaneous

- When you are finished submitting your reports, you can review all submitted reports by clicking Submitted Reports on the left-hand side of the page. You can also see the status of each report from this page (State). If you have recently submitted a report and don't see it in the list, you may see a blue oval at the top of the page that says "Update available". Clicking on that oval should update the list of submitted reports. If a report still isn't showing up in the Submitted Reports list, refresh your browser. However, if it still doesn't show up, return to the Request Reports list and confirm that you have actually hit the Submit button. **PLEASE NOTE: Do not click the Submit button until your report is completed.** You will not be able to edit it once you've submitted it. If you do so inadvertently, please contact the Program Officer and ask them to return the report to you for correction.

The screenshot shows the FLUXX web application interface. On the left is a dark sidebar with the FLUXX logo and a navigation menu. The menu items are: Information (Grantee Portal, How to Apply), Applications (Pending Applications, Applications to Edit, Submitted Applications), Organizations (Organizations), Grants (Active, Closed), and Request Reports (Request Reports, Reports to Edit, Submitted Reports). A red arrow points to the 'Submitted Reports' link. The main content area has a search bar and a list of three reports, all with a 'State: Received' status and a 'Due: 12/31/2016' date. The reports are: 'Future Budget Revision', 'Fiscal Report', and 'Narrative Report'. At the top right of the main area, it says '1 - 3 of 3' with navigation arrows.

The screenshot shows the FLUXX web application interface after an update. A blue notification bubble at the top right says '1 update available'. The search bar now shows '0 Entries'. The sidebar navigation menu is partially visible, showing 'Information' (Grantee Portal, How to Apply).

- If you receive notification that a report has been returned to you, you will find it under Reports to Edit.

