



Fluxx Guidance

Updated March 2020



Table of Contents

Click on the topics below to go to each section.

Getting Started

- Document Naming Convention
- Log-in Information

Proposals

- Starting a Proposal
- Uploading Proposal Documents
- Submitting a Proposal
- Navigating Proposals in Fluxx

Grants

Reports

- Navigating Reports in Fluxx
- Grant Agreements
- Reports Due Section
- Uploading Progress Report Documents
- Uploading Amendment and Completion Report Documents
- Submitting a Report



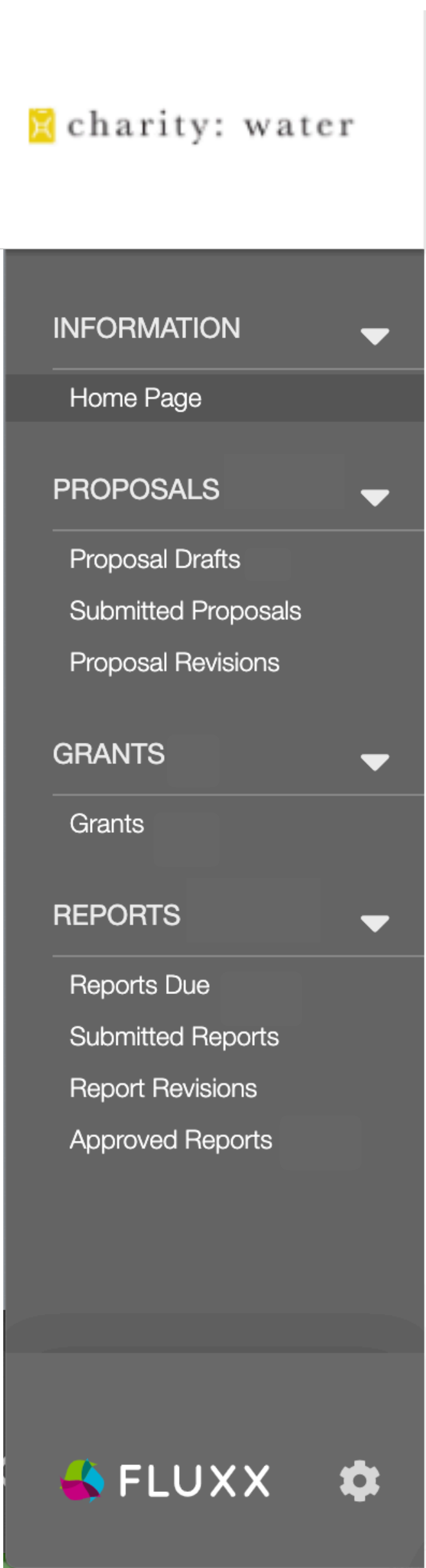
Getting Started

charity: water’s Fluxx partner portal is the hub for managing all your charity: water grant proposals and reports.

In the portal you can:

- view details and documents for all proposals and grants.
- view report due dates for open grants and submit upcoming reports.
- exchange documents with your Water Programs Manager and/or Water Programs Associate.

Note that if we are funding multiple country programs with your organization, you will see Proposals, Grants, and Reports for your entire organization in your Fluxx view.



Welcome! This is where ending the water crisis begins.

Welcome to charity: water's partner portal!

This is the hub for managing all your charity: water grant proposals and reports. Here, you can create, edit, and submit proposals; find information for ongoing grants; and exchange reports with the Water Programs Team at charity: water.

Together, we can bring clean water to millions more people. Thank you for all you do to help end the water crisis.

OVERVIEW

From this portal you can:

- Submit a Proposal
- Revise a Proposal if revisions are requested
- View open Grants
- Submit Reports that are due
- Revise a Report if revisions are requested

HOW TO USE THE PORTAL

Use the links in the left-hand menu to access the following:

PROPOSALS

PROPOSAL DRAFTS

Once you've been invited to submit a proposal, click on "Proposal Drafts" to find the proposal card. The proposal card is where you will input proposal information



Document Naming Convention

[GRANT ID] Proposal Narrative_v1_[DATE OF SUBMISSION].doc

[GRANT ID] Proposal Budget_v1_[DATE OF SUBMISSION].xls

⋮

Grant ID

This will be given to you by your Water Programs Manager or Water Programs Associate when the Request for Proposal is sent to you.

⋮

Document Type

This should be Program Profile (for the Proposal only), Narrative, Budget, Response to Comments, or, if a supporting document, a descriptive name for the document.

⋮

Version

This is the version of the document being submitted, and numbers should be consecutive. Note the final version of documents may not be the same as each other (ex. the Narrative may be v3 while the budget is v6) depending on changes you have been asked to make.

⋮

Submission Date

This is the date documents are uploaded to Fluxx before being submitted to charity: water. While the date can be in any format (ex. DDMonthYY, DD.MM.YYYY) please be consistent across all documents.



Log-in Information



Welcome to the Partner Workspace!

Your username will be the e-mail you provided to charity: water.



Login Now:

Create or change your password with this link.



[Reset or create password](#)

First time here? Please Create an Account Now to register your organization and receive your username and password.

Already have an account? Login to submit a new concept note or manage an existing one.

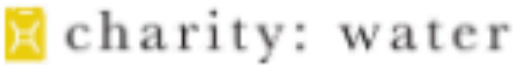


You can access Fluxx using the following link: charitywater.fluxx.io



Starting a Proposal

Once you’ve been invited to submit a proposal, click on “Proposal Drafts” to find the proposal card.



INFORMATION

Home Page

PROPOSALS

Proposal Drafts

Submitted Proposals

Proposal Revisions

GRANTS

Grants



REPORTS


Reports Due

Submitted Reports

Report Revisions

Approved Reports



Welcome! This is where ending the water crisis begins.

Welcome to charity: water's partner portal!

This is the hub for managing all your charity: water grant proposals and reports. Here, you can create, edit, and submit proposals; find information for ongoing grants; and exchange reports with the Water Programs Team at charity: water.

Together, we can bring clean water to millions more people. Thank you for all you do to help end the water crisis.

OVERVIEW

From this portal you can:

- Submit a Proposal
- Revise a Proposal if revisions are requested
- View open Grants
- Submit Reports that are due
- Revise a Report if revisions are requested

HOW TO USE THE PORTAL

Use the links in the left-hand menu to access the following:

PROPOSALS

PROPOSAL DRAFTS

Once you've been invited to submit a proposal, click on "Proposal Drafts" to find the proposal card. The proposal card is where you will input proposal information



Starting a Proposal

On the proposal card, your Water Programs Associate will have already filled in the necessary information in the Organization and Program Information sections.

Please review and confirm this information is correct. If you need to make changes, such as selecting a different **Primary Contact** and **Primary Signatory** for the Proposal, click “Edit”. Remember to hit “Save” at the bottom of the proposal card when you are finished.

Edit



[Grant ID]
Organization Name
Grant Amount
Cost per person
Year - Half

PROPOSAL

ORGANIZATION

Organization:

Location:

Primary Contact

Primary Signatory

PROGRAM INFORMATION

Summary of Program:

Country:

PER Amount:

Uploading Proposal Documents

On the proposal card, scroll down and click the button next to the **Concept Note | Proposal Documents** section.

Click “Add files” to browse for the required proposal documents or drag the files to the Upload files box.

Assign the appropriate document type to every attachment using the drop down menu.

When all documents have been added, click “Start upload”. When the Status for all documents has reached 100%, the window can be closed. Documents will now appear under the corresponding proposal.

Upload files

Select or drag files then start upload

Filename		Size	Status
Program Profile_v1_DATE OF SUBMISSION.docx	1. Program Profile	11 KB	0%
GRANT ID Narrative_v1_DATE OF SUBMISSION.docx	2. Proposal Narrative	11 KB	0%
GRANT ID Budget_v1_DATE OF SUBMISSION.xlsx	<div> <div>1. Program Profile</div> <div>2. Proposal Narrative</div> <div>✓ 3. Proposal Budget & Expenditures</div> <div>4. Proposal Supporting Doc</div> <div>5. Response to Proposal Comments</div> <div>6. c:w Comments - Revisions Required</div> <div>7. c:w Approved - Proposal Document</div> </div>	8 KB	0%
		31 KB	0%

Add files

Start upload

1. *Program Profile* - use for the Program Profile
2. *Proposal Narrative* - use for the Narrative document
3. *Proposal Budget and Expenditures* - use for the Budget document
4. *Proposal Supporting Doc* - use for any document supporting your Proposal submission, but that is not the Program Profile, Narrative, Budget, or response to comments
5. *Response to Proposal Comments* - use for any document responding to charity: water comments on your Proposal submission

Please only classify documents using tags 1 through 5. Tags 6 and 7 will be used by your charity: water Water Programs Manager or Water Programs Associate to classify documents.



Submitting a Proposal

When you’ve finished reviewing the Proposal details and have uploaded the necessary documents, click the green “Submit Proposal Documents” button at the bottom to fully submit the request to your charity: water Water Programs Manager.

Make sure all documents have been uploaded before clicking “Submit Proposal Documents” as once this button has been pushed you will not be able to make changes to the Proposal.

Edit

[Grant ID]

Organization Name

Grant Amount

Cost per person

Year - Half

PROPOSAL

ORGANIZATION

Organization:

Location:

Primary Contact

Primary Signatory

PROGRAM INFORMATION

Summary of Program:

Country:

PER Amount:

Submit Proposal Documents



Navigating Proposals

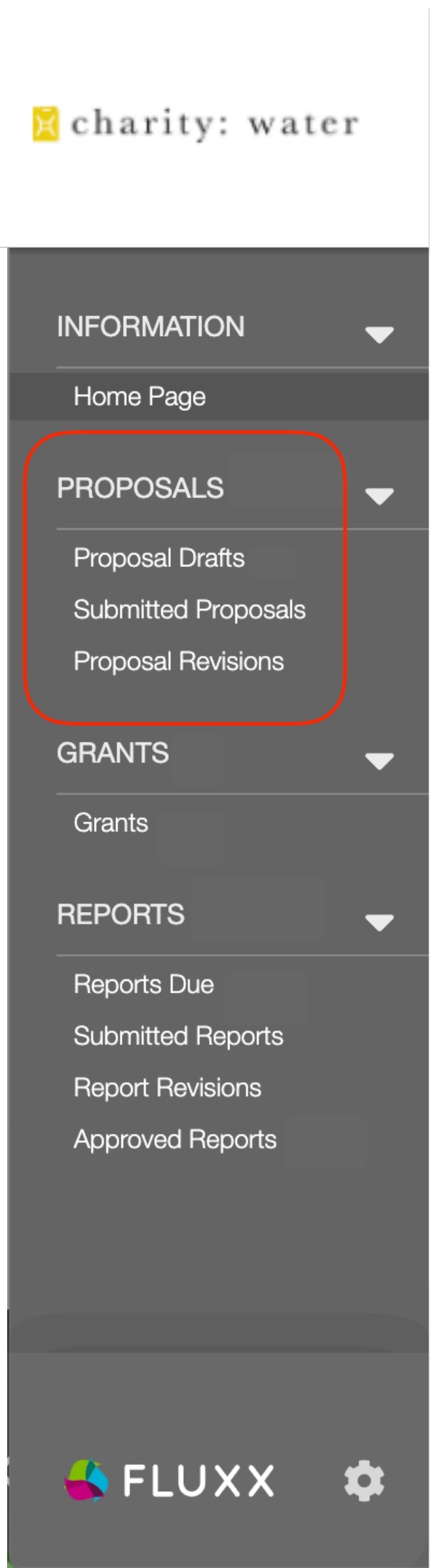
You can navigate through the **Proposals** sections of the portal using the menu on the left side of the home page.

Proposal Drafts - Proposals that have been saved but not yet submitted can be found here.

Submitted Proposals - Proposals that have been submitted to charity: water can be found here. This section is read-only for your team.

Proposal Revisions - Proposals that have been submitted, reviewed by charity: water, and require revisions from your team are found here.

For each proposal listed, you will see the charity: water Grant ID, country of implementation, amount requested, cost per beneficiary, and granting time period.



Welcome! This is where ending the water crisis begins.

Welcome to charity: water's partner portal!

This is the hub for managing all your charity: water grant proposals and reports. Here, you can create, edit, and submit proposals; find information for ongoing grants; and exchange reports with the Water Programs Team at charity: water.

Together, we can bring clean water to millions more people. Thank you for all you do to help end the water crisis.

OVERVIEW

From this portal you can:

- Submit a Proposal
- Revise a Proposal if revisions are requested
- View open Grants
- Submit Reports that are due
- Revise a Report if revisions are requested

HOW TO USE THE PORTAL

Use the links in the left-hand menu to access the following:

PROPOSALS

PROPOSAL DRAFTS

Once you've been invited to submit a proposal, click on "Proposal Drafts" to find the proposal card. The proposal card is where you will input proposal information

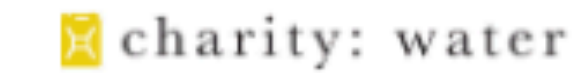


Grants

All open and closed charity: water grants can be found under the **Grants** section in the menu. You can click into each grant to view the details for that grant.

For each grant listed, you will see the charity: water Grant ID, country of implementation, amount granted, cost per beneficiary, and granting time period.

You can find a read-only version of the grant's proposal documents by clicking into each grant.



INFORMATION

Home Page

PROPOSALS

Proposal Drafts

Submitted Proposals

Proposal Revisions

GRANTS

Grants



REPORTS

Reports Due

Submitted Reports

Report Revisions

Approved Reports





Welcome! This is where ending the water crisis begins.

Welcome to charity: water's partner portal!

This is the hub for managing all your charity: water grant proposals and reports. Here, you can create, edit, and submit proposals; find information for ongoing grants; and exchange reports with the Water Programs Team at charity: water.

Together, we can bring clean water to millions more people. Thank you for all you do to help end the water crisis.

OVERVIEW

From this portal you can:

- Submit a Proposal
- Revise a Proposal if revisions are requested
- View open Grants
- Submit Reports that are due
- Revise a Report if revisions are requested

HOW TO USE THE PORTAL

Use the links in the left-hand menu to access the following:

PROPOSALS

PROPOSAL DRAFTS

Once you've been invited to submit a proposal, click on "Proposal Drafts" to find the proposal card. The proposal card is where you will input proposal information

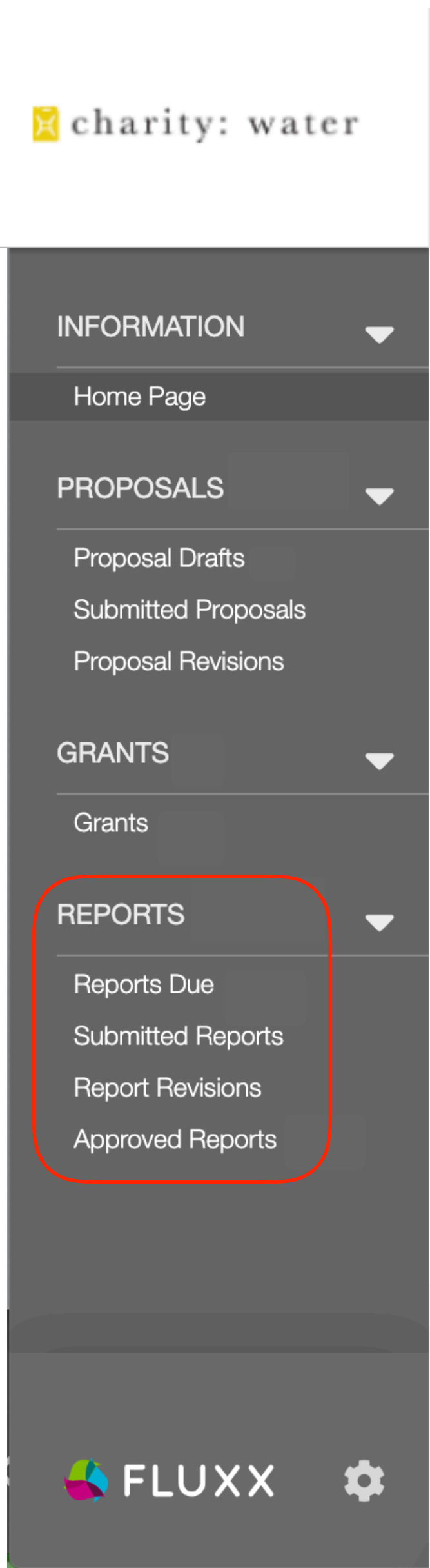


Reports

All associated reports for each of your organization’s grants can be found in the **Reports** section in the left side menu.

For each report listed, you will see the charity: water Grant ID, type of report, and report due date. There are five types of reports, which are associated with different color icons when viewed in list form:

- Grant Agreements 
- Progress Reports 
- Completion Reports 
- Amendments 
- Supplemental Reports 



Welcome! This is where ending the water crisis begins.

Welcome to charity: water's partner portal!

This is the hub for managing all your charity: water grant proposals and reports. Here, you can create, edit, and submit proposals; find information for ongoing grants; and exchange reports with the Water Programs Team at charity: water.

Together, we can bring clean water to millions more people. Thank you for all you do to help end the water crisis.

OVERVIEW

From this portal you can:

- Submit a Proposal
- Revise a Proposal if revisions are requested
- View open Grants
- Submit Reports that are due
- Revise a Report if revisions are requested

HOW TO USE THE PORTAL

Use the links in the left-hand menu to access the following:

PROPOSALS

PROPOSAL DRAFTS

Once you've been invited to submit a proposal, click on "Proposal Drafts" to find the proposal card. The proposal card is where you will input proposal information



Navigating Reports

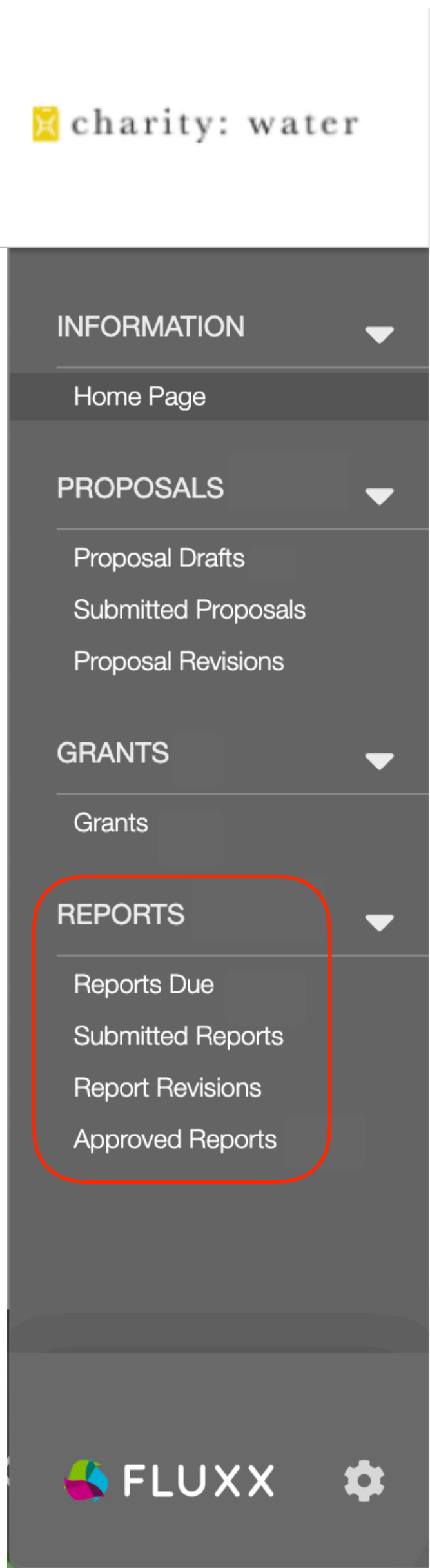
You can navigate through the **Reports** sections of the portal using the menu on the left side of the home page.

Reports Due - All upcoming reports associated with an open grant are found here, and will remain in the *Due* state until fully submitted.

Submitted Reports - Reports that have been submitted to charity: water can be found here. This section is read-only for your team.

Report Revisions - Reports that have been submitted, reviewed by charity: water, and require revisions from your team are found here.

Approved Reports - Reports that have been submitted, reviewed, and approved by charity: water are found here.



Welcome! This is where ending the water crisis begins.

Welcome to charity: water's partner portal!

This is the hub for managing all your charity: water grant proposals and reports. Here, you can create, edit, and submit proposals; find information for ongoing grants; and exchange reports with the Water Programs Team at charity: water.

Together, we can bring clean water to millions more people. Thank you for all you do to help end the water crisis.

OVERVIEW

From this portal you can:

- Submit a Proposal
- Revise a Proposal if revisions are requested
- View open Grants
- Submit Reports that are due
- Revise a Report if revisions are requested

HOW TO USE THE PORTAL

Use the links in the left-hand menu to access the following:

PROPOSALS

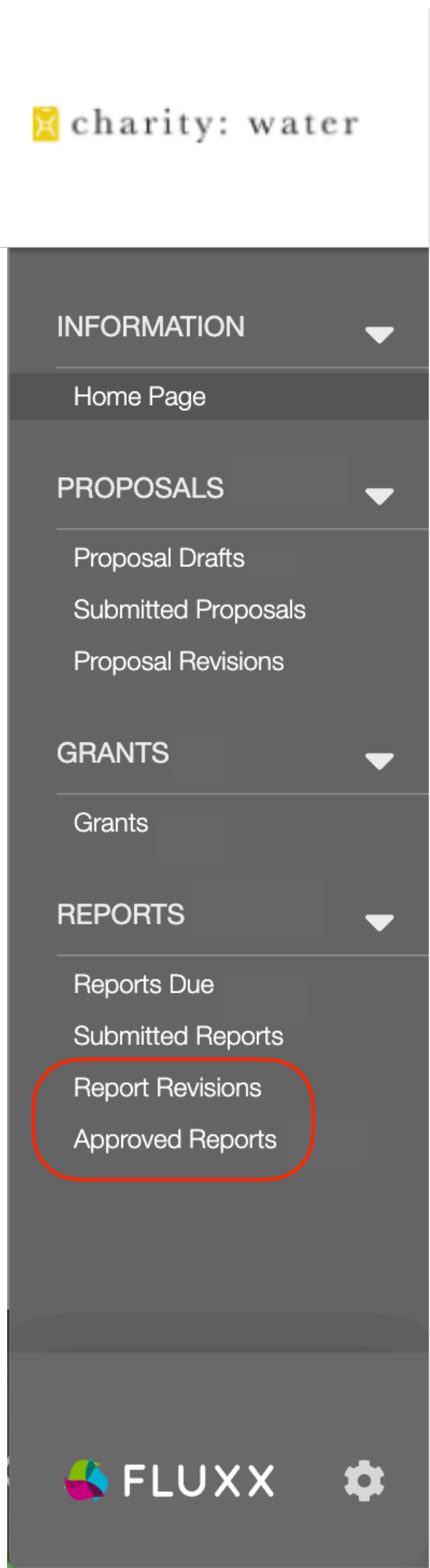
PROPOSAL DRAFTS
Once you've been invited to submit a proposal, click on "Proposal Drafts" to find the proposal card. The proposal card is where you will input proposal information



Grant Agreements

Agreements that are ready for review and/or signature will appear in the **Report Revisions** section.

Once signed, the Grant Agreement card will appear in your **Approved Reports**.



Welcome! This is where ending the water crisis begins.

Welcome to charity: water's partner portal!

This is the hub for managing all your charity: water grant proposals and reports. Here, you can create, edit, and submit proposals; find information for ongoing grants; and exchange reports with the Water Programs Team at charity: water.

Together, we can bring clean water to millions more people. Thank you for all you do to help end the water crisis.

OVERVIEW

From this portal you can:

- Submit a Proposal
- Revise a Proposal if revisions are requested
- View open Grants
- Submit Reports that are due
- Revise a Report if revisions are requested

HOW TO USE THE PORTAL

Use the links in the left-hand menu to access the following:

PROPOSALS

PROPOSAL DRAFTS

Once you've been invited to submit a proposal, click on "Proposal Drafts" to find the proposal card. The proposal card is where you will input proposal information



Reports Due

Important notes on this section to ensure you are submitting documents on the correct report card:

- Reports are listed in descending order, with the next report due at the bottom of the list. Please always check the report due date, indicated by the red arrow, before uploading.
- For organizations with multiple country programs, please always check the correct country appears in the grant ID, indicated by the blue arrow, before uploading.

charity: water

PROPOSALS

Proposal Drafts

Submitted Proposals

Proposal Revisions

GRANTS

Grants

REPORTS

Reports Due

Submitted Reports

Report Revisions

Approved Reports

Search...

◆ [COUNTRY 1].PTR.2H.18.[ID#]

Completion Report

Due: 3/14/2020

◆ [COUNTRY 2].PTR.1H.19.[ID#]

Progress Report

Due: 2/29/2020

◆ [COUNTRY 3].PTR.2H.18.[ID#]

Completion Report

Due: 2/28/2020

◆ [COUNTRY 4].PTR.2H.18.[ID#]

Progress Report

Due: 1/15/2020

◆ [COUNTRY 1].PTR.2H.18.[ID#]

Progress Report

Due: 12/13/2019

1 - 11 of 11

Edit

PROGRESS REPORT

[COUNTRY 1].PTR.2H.18.[ID#]

Partner

DUE 12/13/2019

Due Date Per GA: 12/13/2019


Current Due Date:

PARTNER COMMENTS

Submit Report

15

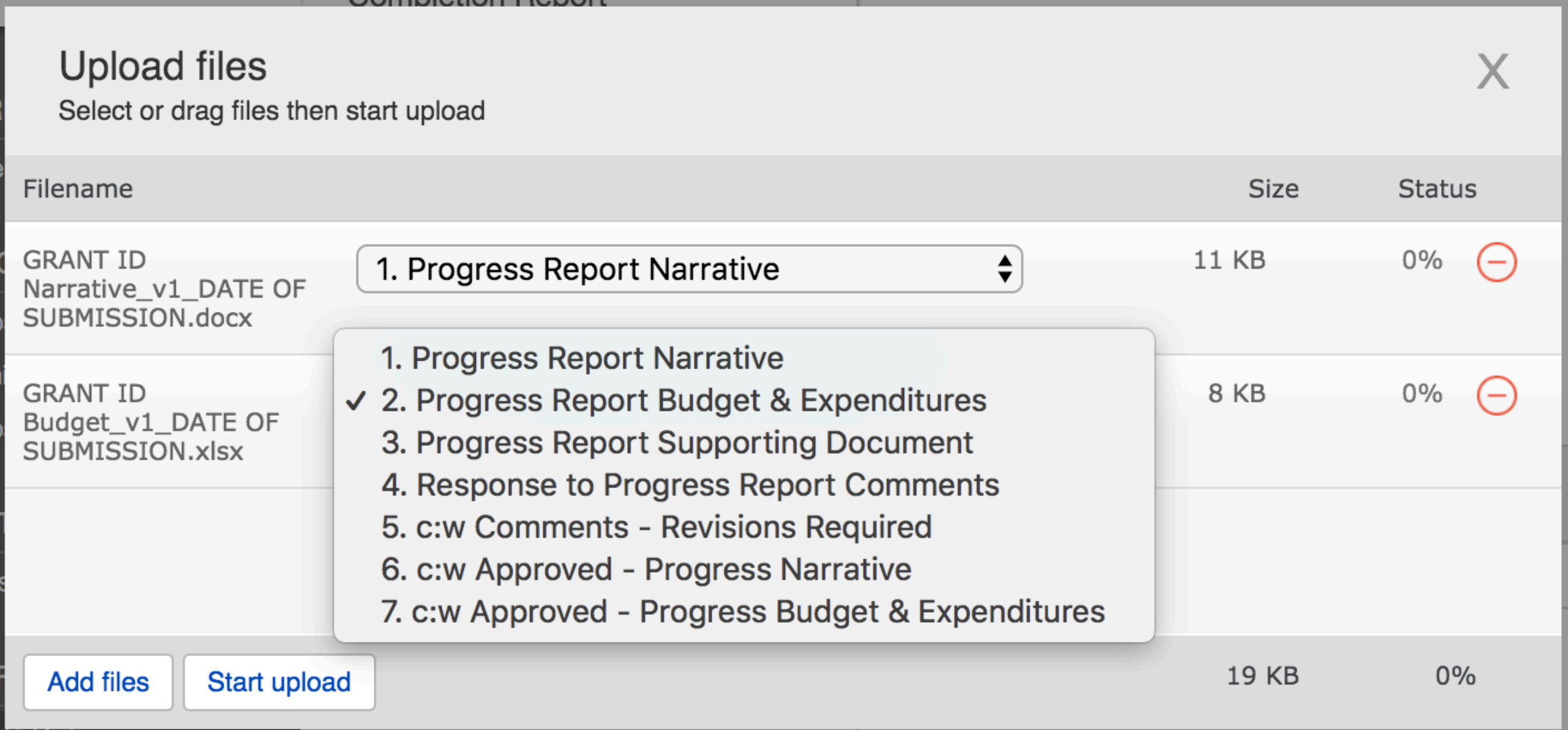
Uploading Progress Report Documents



On the Report card, click the  button next to the **Report Documents** section.

Click “Add files” to browse for the required report documents or drag the files to the Upload files box.

Assign the appropriate document type to every attachment using the drop down menu.

When all documents have been added, click “Start upload”. When the Status for all documents has reached 100%, the window can be closed. Documents will now appear under the corresponding report.



Filename	Size	Status
GRANT ID Narrative_v1_DATE OF SUBMISSION.docx	11 KB	0% 
GRANT ID Budget_v1_DATE OF SUBMISSION.xlsx	8 KB	0% 
	19 KB	0%

1. *Progress Report Narrative* - use for the Narrative document
2. *Progress Report Budget and Expenditures* - use for the Budget document
3. *Progress Report Supporting Document* - use for any document supporting your Report submission, but that is not the Narrative, Budget, or response to comments
4. *Response to Progress Report Comments* - use for any document responding to charity: water comments on your Report submission

Please only classify documents using tags 1 through 4. Tags 5 through 7 will be used by your charity: water Water Programs Manager or Water Programs Associate to classify documents.



Uploading Amendment and Completion Report Documents

For Amendments and Completion Reports, the process to upload documents is the same as for all Progress Reports. However, the tags used to classify documents will be different.

Amendment

- 1. *Amendment Request Letter* - use for your Amendment request
- 2. *Amendment Workplan* - use for the Amendment workplan that accompanies your Amendment request
- 3. *Amendment Expenditure Plan* - use for the Amendment budget that accompanies your Amendment request
- 4. *Amendment Supporting Document* - use for any document supporting your Amendment submission, but that is not the Request, Workplan, or Expenditure Plan

Please only classify documents using tags 1 through 4. Tags 6 through 8 will be used by your charity: water Water Programs Manager or Water Programs Associate to classify documents.

Completion Report

- 1. *Completion Narrative* - use for the Narrative document
- 2. *Completion Budget & Expenditures* - use for the Budget Document
- 3. *Completion Report Supporting Document* - use for any document supporting your Completion Report submission, but that is not the Narrative, Budget, or response to comments
- 4. *Response to Completion Report Comments* - use for any document responding to charity: water comments on your Completion Report submission

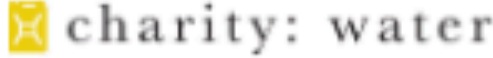
Please only classify documents using tags 1 through 4. Tag 5, *Completion Report Project Outputs*, may be used if you are instructed by your Water Programs Manager or Water Programs Associate. Tags 6 through 9 will be used by your charity: water Water Programs Manager or Water Programs Associate to classify documents.



Submitting a Report

When you’ve uploaded the necessary documents and are ready to submit your report, click the “Save” button at the bottom of the page and Fluxx will take you to a saved version of the report. Click the green “Submit Report” button at the bottom to fully submit the report to your charity: water Water Programs Manager.

Make sure all documents have been uploaded before clicking “Submit Report” as once this button has been pushed you will not be able to make changes to the Proposal.



INFORMATION

Home Page

PROPOSALS

Proposal Drafts

Submitted Proposals

Proposal Revisions

GRANTS

Grants



REPORTS


Reports Due

Submitted Reports


Report Revisions

Approved Reports

 FLUXX 



Edit



PROGRESS REPORT

MZ.WVI.2H.18.279

World Vision, Inc.
DUE 12/13/2019

Due Date Per GA:

12/13/2019

Current Due Date:

PARTNER COMMENTS

Submit Report

18



Questions?

If you come across any technical issues or questions while navigating through Fluxx, be sure to contact your Water Programs Manager or Water Programs Associate for assistance.