



KAUFFMAN FOUNDATION

Grantee Portal User Guide

© 2013 Ewing Marion Kauffman Foundation

Kauffman Foundation Grantee Portal

This document outlines some information and tips to help you use the Kauffman Foundation Grantee Portal. It will guide you through the following operations:

- Install Google Chrome Browser
- Submit a New Idea
- Log into the Kauffman Foundation Grantee Portal
- Reset or Create Password
- Overview of the Kauffman Foundation Grantee Portal
- Navigate Through the Portal
- Helpful Tips



The Kauffman Foundation Grantee Portal is powered by an automated grants management software system called Fluxx, which was created specifically for the philanthropic foundations and the nonprofit organizations they fund.

Contact GranteeHelpDesk@kauffman.org for technical assistance.

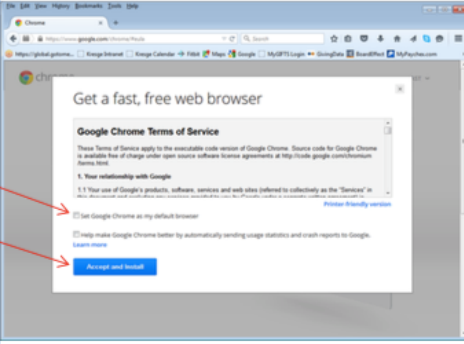
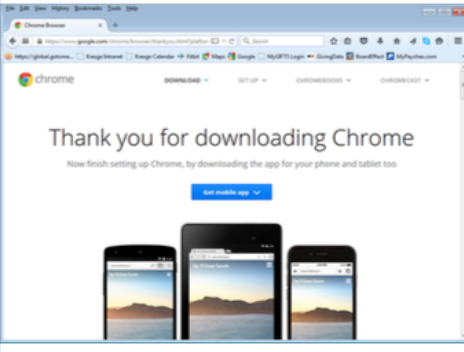
© 2013 Ewing Marion Kauffman Foundation



Ewing Marion
KAUFFMAN
Foundation

Install Google Chrome Browser

Fluxx is configured to work best using the Google Chrome Browser, which should be installed before you access the Portal. Installation instructions are included below for your reference.

<p>1. Click on the following link:</p>	<p>https://www.google.com/chrome/#eula</p>
<p>2. The browser screen on the right will open.</p> <p>a. Uncheck "Set Google Chrome as my default browser"</p> <p>b. Click the "Accept and Install" button.</p>	
<p>3. Installation is complete when this screen appears. You may now close your browser window.</p>	

© 2013 Ewing Marion Kauffman Foundation



Create an Account

If this is your organization's first time applying to the Kauffman Foundation, you will need to create an account.

Access the Kauffman Foundation Grantee Portal at this website address: <https://kauffman.fluxx.io>

Ewing Marion
KAUFFMAN
Foundation

Grant Application and Information

Login Now:

Username

Password

[Reset or create password](#)

Current Grantees
Current grantees may log in anytime to review active grants, view past submissions, and submit progress, and final reports. If you have previously logged into this system, you do not need to create a new account; simply enter your username and password and click "Sign in."

Potential Grantees
If you think your organization or project might be a strong match with the Foundation's priorities, click the "Submit a New Idea" button (below) to proceed with the grant-application process. For more information, please review [our strategic direction](#) and [funding guidelines](#).

About the Kauffman Foundation
The Ewing Marion Kauffman Foundation is a private, nonpartisan foundation established by the late Ewing Marion Kauffman to support the causes he was passionate about - improving lives through education and entrepreneurship, and helping to make Kansas City a better place to live and work.

For help navigating the site, please review the [grantee user guide](#).

powered by
FLUXX

Learn more by reading the Kauffman Foundation's strategic direction and funding guidelines.

Click the "Submit a New Idea" button to proceed with the grant-application process.

You will be directed to the eligibility quiz and registration form.

© 2013 Ewing Marion Kauffman Foundation



Ewing Marion
KAUFFMAN
Foundation

Log into the Grantee Portal

Grantees will access the Kauffman Foundation Grantee Portal at this website address:

<https://kauffman.fluxx.io>

Ewing Marion
KAUFFMAN
Foundation

Grant Application and Information

Login Now:

Username

Password

Sign in

[Reset or create password](#)

Current Grantees
Current grantees may log in anytime to review active grants, view past submissions, and submit progress, and final reports. If you have previously logged into this system, you do not need to create a new account; simply enter your username and password and click "Sign in."

Potential Grantees
If you think your organization or project might be a strong match with the Foundation's priorities, click the "Submit a New Idea" button (below) to proceed with the grant-application process. For more information, please review [our strategic direction](#) and [funding guidelines](#).

About the Kauffman Foundation
The Ewing Marion Kauffman Foundation is a private, nonpartisan foundation established by the late Ewing Marion Kauffman to support the causes he was passionate about - improving lives through education and entrepreneurship, and helping to make Kansas City a better place to live and work.

For help navigating the site, please review the [grantee user guide](#).

Submit a New Idea

powered by
FLUXX

For your first time accessing the site, please click "Reset or create password", and enter the email address provided to the Kauffman Foundation.

Additional instructions for resetting your password are on the next page.

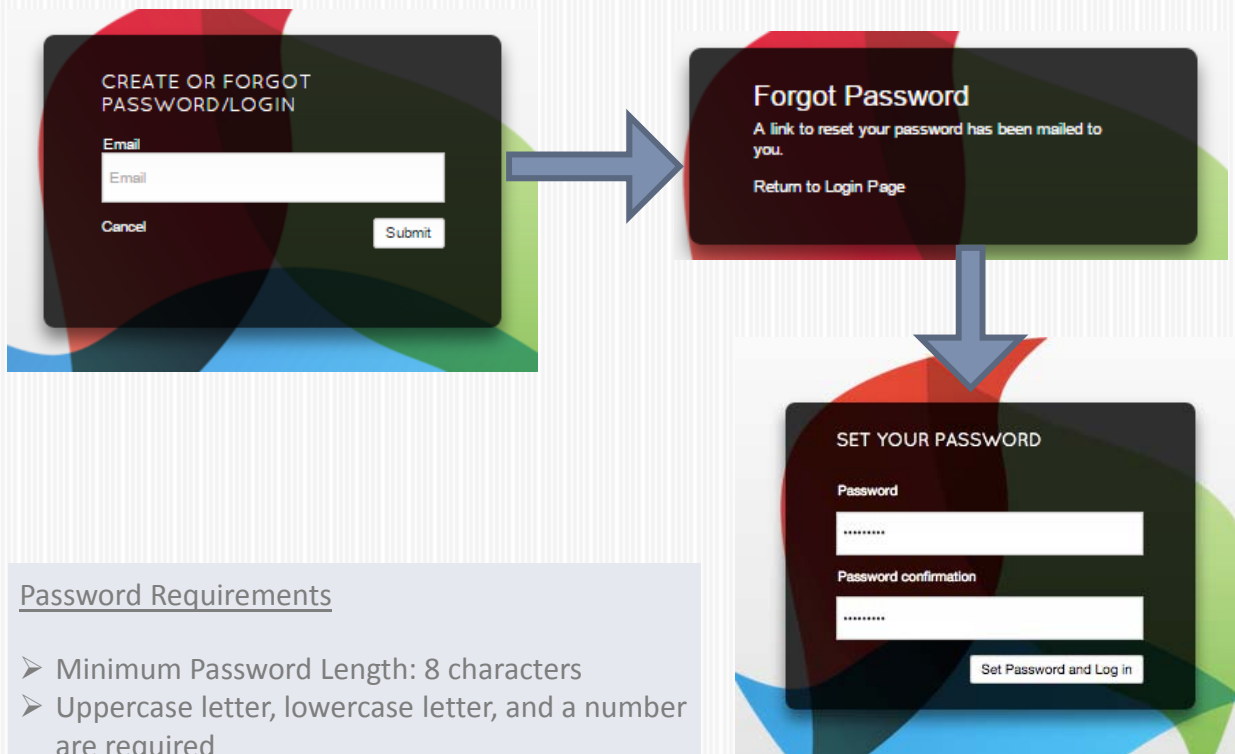
© 2013 Ewing Marion Kauffman Foundation



Ewing Marion
KAUFFMAN
Foundation

Reset or Create Password

When prompted, enter your email address and you will shortly receive an email from the Kauffman Foundation with a link to create or reset your password. Once you set your password, you will be logged into the system.



Troubleshoot

- Check that you are using the Google Chrome browser.
- Ensure you are using the email provided to the Kauffman Foundation.
- Check your spam filter if you did not receive the email to create/reset your password.

Password Requirements

- Minimum Password Length: 8 characters
- Uppercase letter, lowercase letter, and a number are required
- Cannot contain more than 2 repeated characters

© 2013 Ewing Marion Kauffman Foundation



Ewing Marion
KAUFFMAN
Foundation

Overview of the Grantee Portal

The first page you will see is the portal instructions that will provide you with some information about the site.

The links along the left side of the page will help you navigate through the portal.

After clicking the link, the records will appear on the right side of the page. Click on the appropriate record to open the detailed form.

The screenshot shows the left-hand navigation menu of the Ewing Marion Kauffman Foundation Grantee Portal. At the top, it says "Ewing Marion KAUFFMAN Foundation". Below that is a search bar with "All" selected. The menu is organized into several categories: INFORMATION (Grantee Portal), ORGANIZATIONS (Organizations), USERS (People), REQUESTS (Pending Applications, Under Review, Returned For Edits, Awaiting Award Signature, Declined), GRANTS AND AGREEMENTS (Active, Closed), and REPORTS (Reports Due, Under Review, Returned For Edits, Approved). At the bottom of the menu is a "New Request" button and a "Powered by FLUXX" logo with a gear icon.



WELCOME TO THE KAUFFMAN FOUNDATION'S GRANT PORTAL, WHERE YOU CAN....

- Submit a proposal for funding
- Track the status of pending proposals
- Review current grants including the signed grant agreement
- Submit reports
- Monitor payments
- Review contact information

HOW TO USE THE PORTAL

For optimal performance, use Chrome as your browser.

When you click on the links to the left, you can access the following:

ORGANIZATIONS

This is where you review your organization's contact information. This information can not be edited. To request a change to the contact information, please email granteehelpdesk@kauffman.org.

USERS

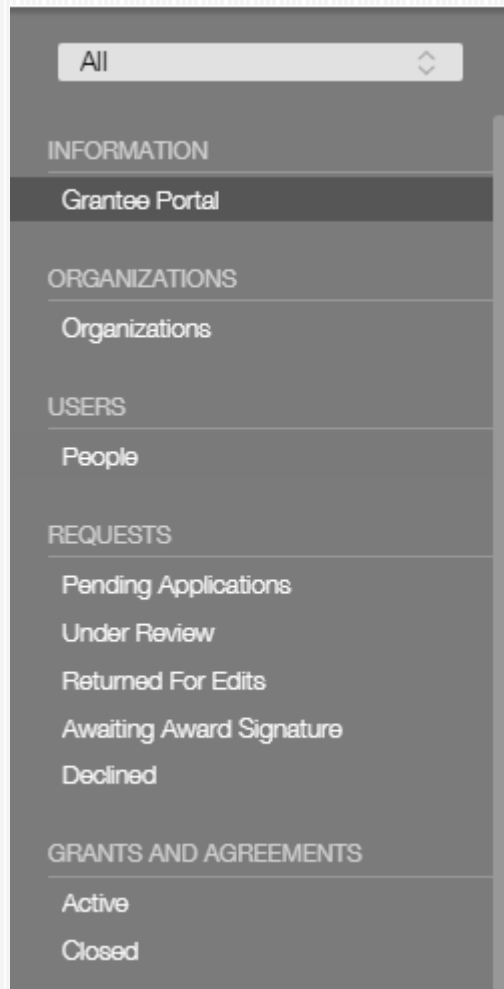
© 2013 Ewing Marion Kauffman Foundation



Ewing Marion
KAUFFMAN
Foundation

Navigate Through the Grantee Portal

Below are some tips about how to navigate through grantee portal.



← Click here for portal Instructions

← Click here to view your organization details

← Click here to view your contact details

← Click here to view pending grant requests

- Pending Application: Applications not yet submitted to the Kauffman Foundation
- Under Review: Kauffman Foundation is reviewing these applications
- Returned for Edits: Request has been returned to you for changes
- Awaiting Award Signature: Award letter is ready to be signed

← Click here to view grants approved by the Kauffman Foundation

© 2013 Ewing Marion Kauffman Foundation



Navigate Through the Grantee Portal

Below are some tips about how to navigate through grantee portal.



The screenshot shows a dark grey sidebar menu on the left with three main sections: REPORTS, PAYMENTS, and a New Request button. The REPORTS section includes links for Reports Due, Under Review, Returned For Edits, and Approved. The PAYMENTS section includes links for Scheduled and Paid. The New Request button is a blue rounded rectangle. At the bottom of the sidebar, it says 'Powered by FLUXX' with a gear icon.

Click here to view upcoming report deadlines and submit reports

- Reports Due: Reports that are not yet submitted to the Kauffman Foundation
- Under Review: Kauffman Foundation is reviewing these reports
- Returned for Edits: Report has been returned to you for changes

Click here to view payments (paid) and upcoming payments (scheduled)

Click the New Request button to start a new application.

- Prior to creating a new request confirm an application is not already created under Pending Applications above.

© 2013 Ewing Marion Kauffman Foundation



Helpful Tips

Below are some key reminders for working in the Kauffman Foundation Grantee Portal.

Save

- **Save**: Click “Save” to record any changes you have made.

Edit

- **Edit**: Click “Edit” to make changes to a request or report.

Submit Application

- **Submit**: Click “Submit Application” to send your applications and reports for review.

Delete

- **Delete**: Click “Delete” to cancel any changes you have made and exit edit mode.



- **Print**: Click to print a copy of your LOI, proposal or report.

*NOTE: There is no auto-save, so please **remember to save often**.*

© 2013 Ewing Marion Kauffman Foundation



Ewing Marion
KAUFFMAN
Foundation