

HOUSTON ENDOWMENT

GRANTEE GUIDE TO: **Reports & Forms**

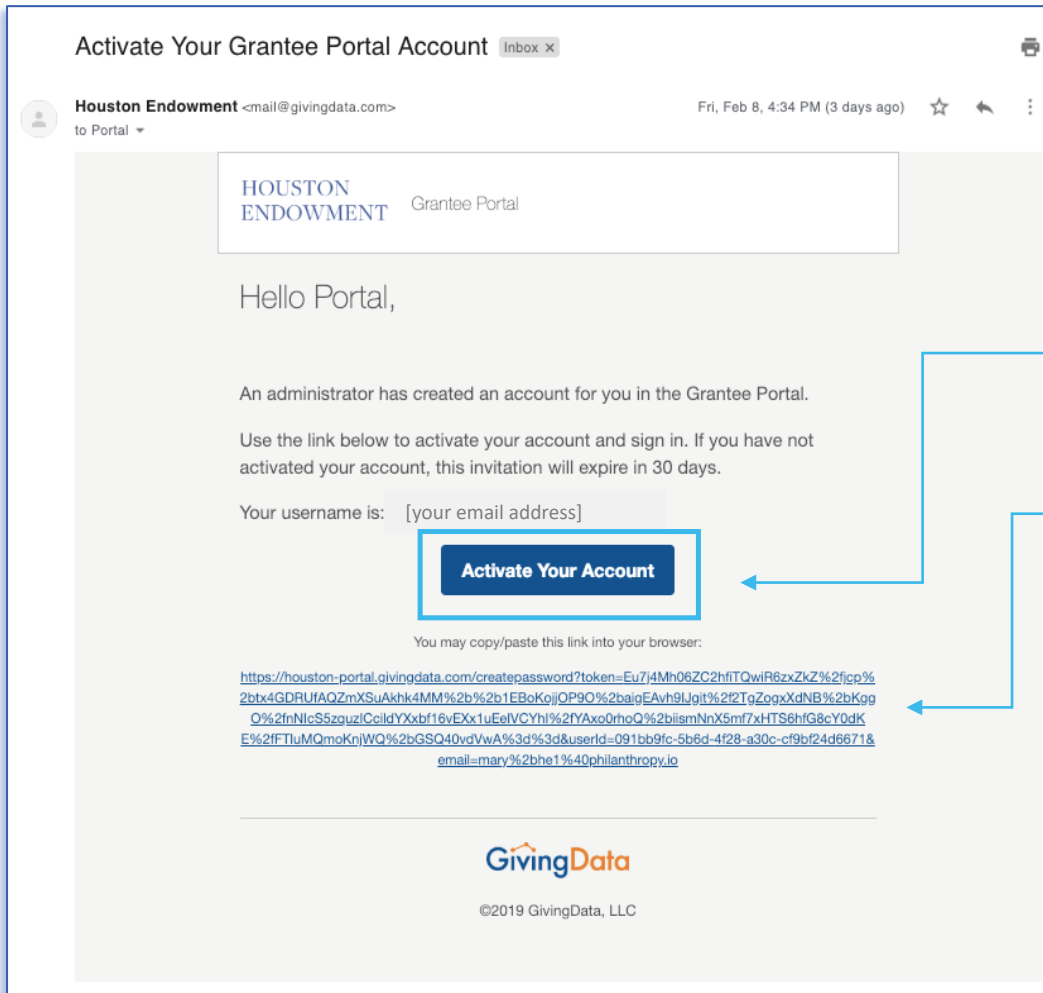
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ACCOUNT ACTIVATION & SIGNING IN



Invitation Email



You will receive an email from our grants management system, GivingData, inviting you to submit a report via the grantee portal. **Please add mail@givingdata.com and noreply@givingdata.com to your email safe list/favorites to ensure that you receive the invitation and other communications.**

From the email, you can click the **Activate Your Account** button to go directly to the link.

If the button doesn't work, copy and paste the URL below the button into your web browser. The URL is specific to your user. (Do not copy the URL in this guide.)

Once registered you can login and proceed to the appropriate section.

Tip: GivingData works best in a Google Chrome or Safari web browsers.

If you require assistance or additional login credentials for other staff, contact grantsupport@houstonendowment.org or call (713) 238-8150.

Create a Password

When you visit the URL included in the email, you will be prompted to create a password, as depicted in the image below.

Your username is your email address to which the invitation was sent.

Before creating a password, please note password requirements:

- At least **six characters** long.
- A **special character** (!, @, #, &, \$, %, etc.).
- A **number**.
- A **lower case letter**.
- An **upper case letter**.
- **Case-sensitive**.

Once you have a password that complies with the requirements:

1. **Enter the password** in the first box.
2. **Retype** the password in the second box to confirm it.
3. Click **Save**.

If the password you attempt to create does not comply with the requirements, the field will be highlighted in red and a popup containing the requirements will display. Edit your password until it complies. You will only be able to click **Save** and complete this step when your password meets the requirements.

HOUSTON
ENDOWMENT Grantee Portal

Create Password

Create a password to sign in with the account
[your email address].

Password

Confirm Password

Save

Sign In

Once you have successfully created a password, a Sign In page will appear.

To sign-in:

1. Enter your **Email Address**.
2. Enter your **Password**.
3. Click **Sign In**.

Tip: Bookmark the Sign In page so you can easily return to it: houston-portal.givingdata.com.

Forgot your password? If you forget your password, click this link. A new screen will appear, where you can enter your email address and receive an email that contains a link to reset your password.

HOUSTON ENDOWMENT Grantee Portal

Sign In

Email Address

Password

Sign In

Forgot your password?

Bookmark this page to return to the Grantee Portal in the future.

GivingData

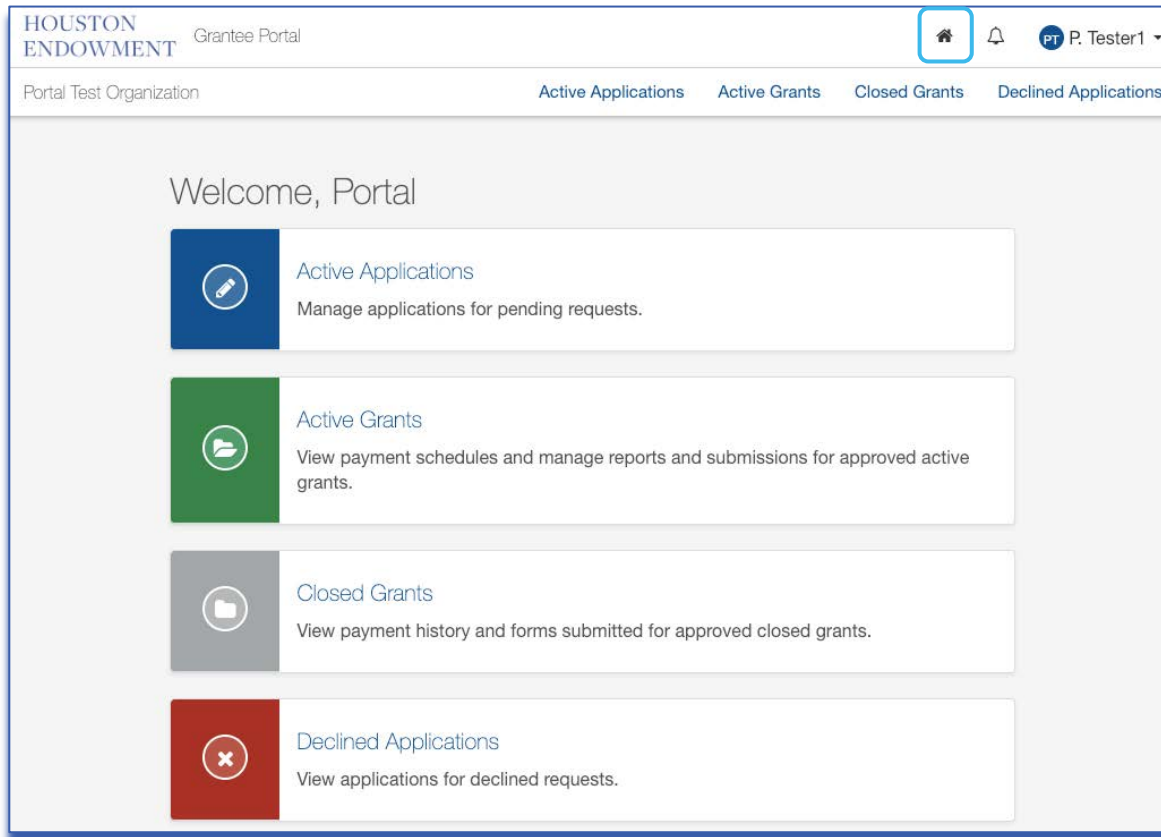
©2019 GivingData, LLC v4.3.10.1

Privacy Notice

Grantee Portal Home

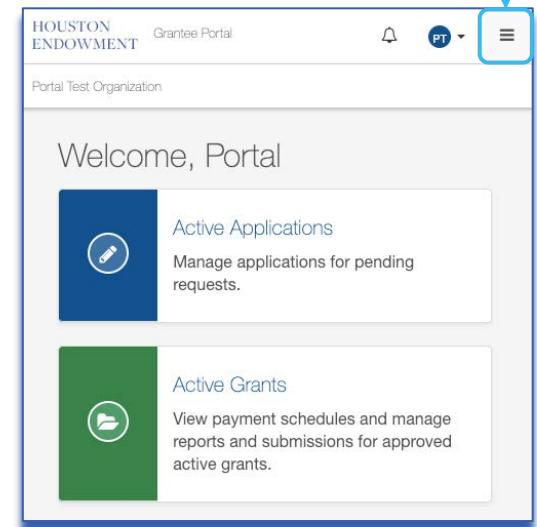
Upon login, you will see the **Home page**. Click  (Home) at any time to return to this view.

Mobile device? This is a responsive platform, which means that the view will change as you shrink your browser window or if you are viewing it on your mobile device. The layout might look slightly different, but it will have the same functionality that is available in an expanded-web view.



Mobile or Condensed Web View


In this view the menu is collapsed into a hamburger menu (right and below). Click on it to view the menu.



GRANTEE PORTAL OVERVIEW



Grantee Portal Home

Upon login, you will first see the **Home page**. You can access everything you need from this page. The key areas of the Home page are highlighted below. By clicking  (Home), you can return to this view from any screen in the system.

Home

Notifications

Profile

Click on your name to Manage your profile or Sign Out.

HOUSTON ENDOWMENT Grantee Portal

[Organization Name]

Top Menu Active Applications Active Grants Closed Grants Declined Applications

Welcome, [Your Name] Dashboard

Active Applications
Manage applications for pending requests.

Active Grants
View payment schedules and manage reports and submissions for approved active grants.

Closed Grants
View payment history and forms submitted for approved closed grants.















Declined Applications
View applications for declined requests.

Hamburger Menu

This menu appears in **mobile and condensed browser views**. Click on it to expand or collapse. It includes the Top Menu options plus Home.



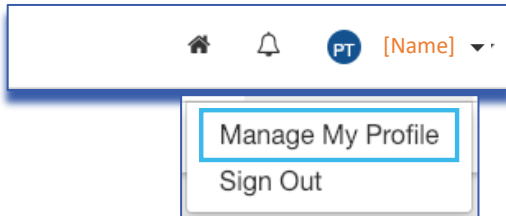
Legend of System Icons

System & Dashboard		Forms	
	Home: clicking on this icon will take you to the home view.		Hamburger Menu drawer: click it to expand and view the steps menu. Click again to hide.
	Notifications: clicking on this icon will display a list of notifications (if any).		Question mark: click to display a description or instructional text.
	Hamburger Menu: Click to expand and view a menu. Click again to hide.		Incomplete Step
	Active Applications		Completed Step
	Active Grants		Flagged Step
	Closed Grants		Pencil: click to edit a field.
	Declined Applications		Progress Indicator: In a modal, this will indicate how many steps and which step you are on.

All changes saved

You may notice activity in the lower left corner of the window. GivingData will notify you as it is auto-saving or confirm that all changes have been saved. If the system is not auto-saving, it will indicate that as well, so you know to save your work as you go.

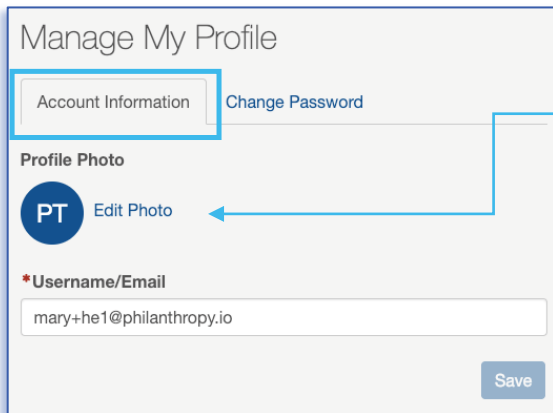
Manage My Profile



From the top menu, **click on your name** to expose a dropdown menu, then select **Manage My Profile**. The page has two tabs: **Account Information** and **Change Password**.

Account Information

Username/Email: Delete the existing information and type the username you prefer to use in the text field. Use this when you next login.



Profile Photo: To add or edit a photo, click **Edit Photo**.

An Edit Profile Photo modal will appear. **Drag** a file into the upload box **or** click **Select File** to choose a file. Once a file is successfully uploaded, it will appear in preview. You can drag, expand, and move the display area.

To delete the profile photo, click the red **Delete Profile Photo** button.

Once you have chosen the display area, click **Save**.

Change Password

To change your password, select this tab. Then enter your Current Password, followed by the new password twice. (Refer to password guidelines on page 4.) Click **Save** to save your changes.

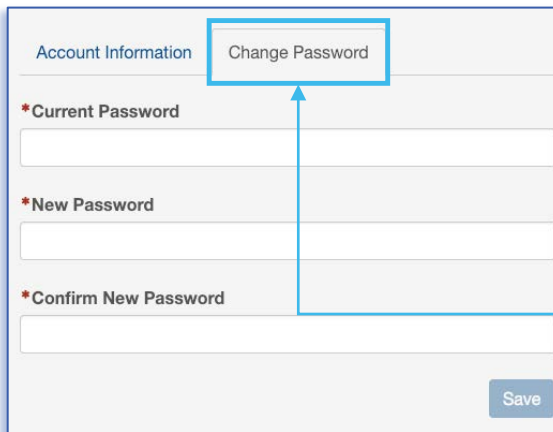
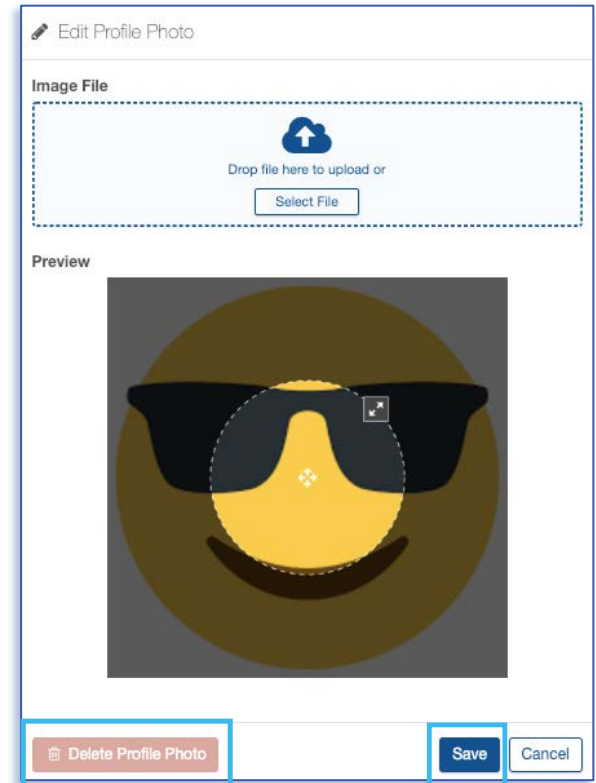


Photo Modal Window



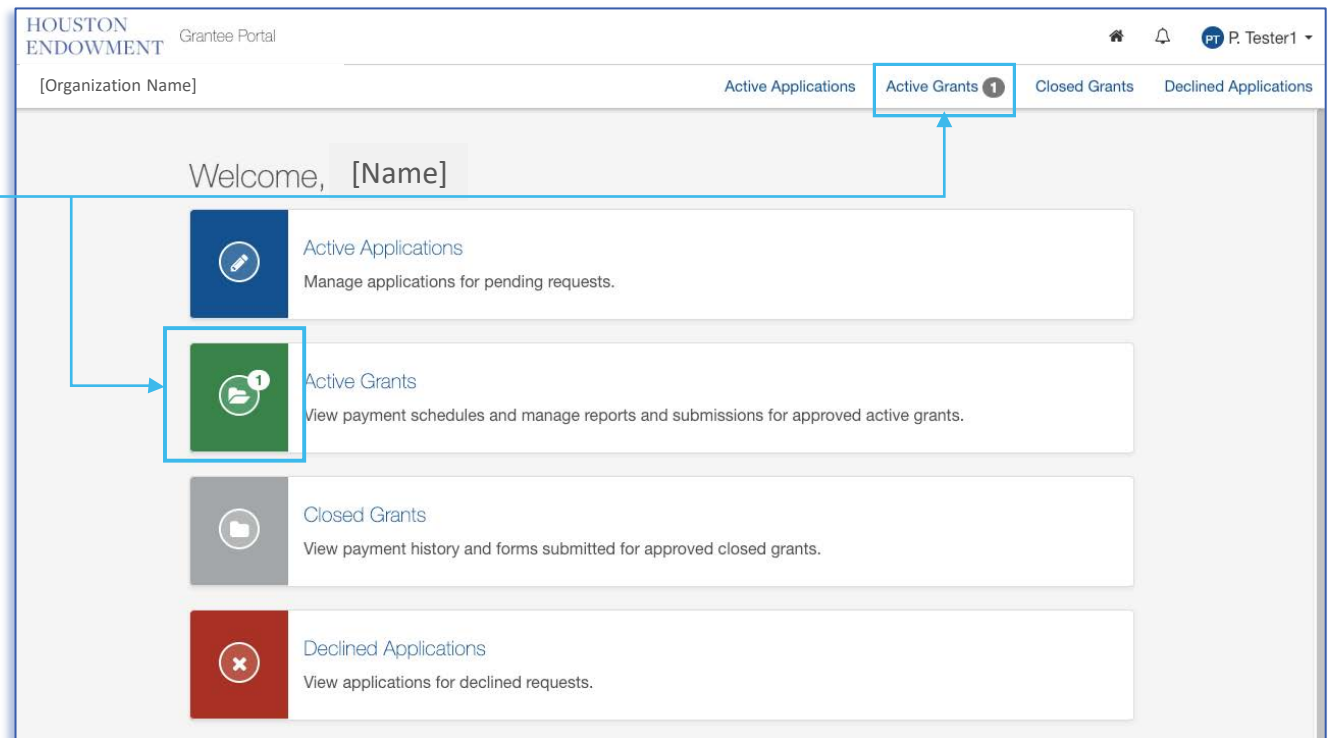
Navigation

Use the menus (Top, Dashboard, and Hamburger) to navigate throughout the portal. Each menu displays the same options. Click on the title or an icon to access the corresponding section of the portal (i.e., clicking Active Grants will take you to the Active Grants section). Within sections and forms, you will find hyperlinks and buttons to help you navigate. Keep in mind that the hamburger menu will only display on mobile devices or condensed-browser views.

Alert Badges

The portal uses an alert-badge system to indicate how many items you have in each category. In the example (right), “1” appears in both the Top Menu and on the icon on the Dashboard to indicate there is one Active Grant.

This can help you focus in on where you might need to review information or complete forms.



« Back to Active Grants

Open Report

Hyperlinks and Buttons

Within each section and its corresponding forms (i.e., Applications and Reports), you will find hyperlinked text (top left) and buttons (lower left) with clear descriptions to help you navigate between pages.

Sections

Active Applications

If you have any pending requests for funding in the system, they will be listed here. Click this section to view the list and navigate to application forms.

Active Grants





If you have any approved, active grants, they will be listed here. From the list view, you can navigate to view grant details. Detail pages include general information, payment information, and forms related to the grant. Please note, grants submitted and approved in our previous system may have abbreviated information available.

Closed Grants

If you have previously approved and now closed grants, they will be listed here. Please note, grants submitted and approved in our previous system may have abbreviated information available.

Declined Applications

If you have submitted any applications that have been declined, they will be listed here.


	<h3>Active Applications</h3> <p>Manage applications for pending requests.</p>
	<h3>Active Grants</h3> <p>View payment schedules and manage reports and submissions for approved active grants.</p>
	<h3>Closed Grants</h3> <p>View payment history and forms submitted for approved closed grants.</p>
	<h3>Declined Applications</h3> <p>View applications for declined requests.</p>

Form Basics

Applications and Report forms are used to request information using the following field types:

- Number
- Text
- Check box
- Paragraph with rich text
- Date
- Dropdown select
- Upload

Required Fields

Fields marked with red asterisks (*) are required and must be complete for a form to be submitted. If you leave a required field blank, you may see this error:  **Required.**

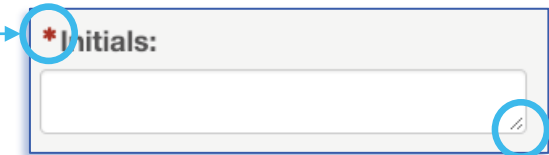
Field Expansion

Some text and paragraph fields have diagonal lines in their bottom right corners. You can click and drag these marks to expand the field.

View/Print Full Form (Report or Application)

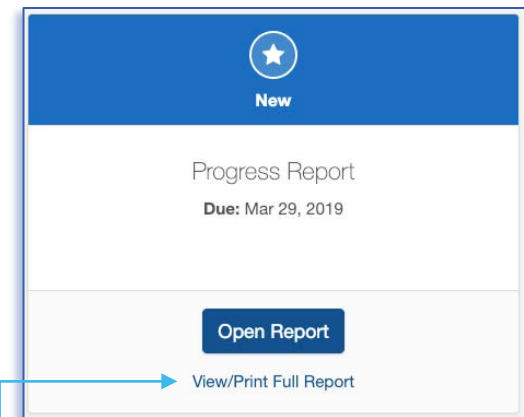
Each form gives you the option (from the tile and from the steps menu within) to View/Print the Full Form. Upon clicking the text or button, a modal will appear. Scroll to view all fields.

- **Include/Exclude Responses:** You will have the option to view the form with or without responses. Tick the box at the bottom of the modal to include or exclude responses.
- **Print:** Select the **Print** button from the bottom of the modal.
- **Close:** To exit the modal, click the **Close** button at the bottom or the **X** at the top right of the modal.



* Initials:

A text input field with a red asterisk and the label "Initials:". A small icon with diagonal lines in the bottom right corner indicates field expansion capability.



New

Progress Report

Due: Mar 29, 2019

Open Report

View/Print Full Report

A report tile with a blue header containing a star icon and the word "New". Below the header, it displays "Progress Report" and "Due: Mar 29, 2019". At the bottom, there is a blue "Open Report" button and a link "View/Print Full Report".



View/Print Full Report

A dark grey button with white text "View/Print Full Report".



Include responses

Close Print

A modal window with a checked checkbox and the text "Include responses". Below the checkbox are two buttons: "Close" and "Print".

Field Types: Number, Text, and Check box

Number

Number fields are not specially marked in a way that distinguishes them from text fields. The prompt is a good clue that this is a number field by asking for a numeric value.

*** Grant funds received from Houston Endowment this past year:**

h

⚠ Number format is not valid. Valid format: 123

If you try to enter letters into a number field, you will get an error message in red (depicted above). If this occurs, delete the content and enter numbers.

Do not use symbols such as commas or periods as separators. This field only accepts whole numbers.

Text

The standard text field is a blank white box in which you can enter letters, numbers, and characters. A text field is an indication that the response is meant to be short. (Paragraph fields are used for prompts that require longer responses.)

*** Initials:**

Check box

This type of field is exactly as it sounds: a box to be checked or unchecked. Click on the box to check or uncheck it as needed.



attest that I am authorized to submit this report on behalf of this organization.

Field Type: Paragraph with rich text

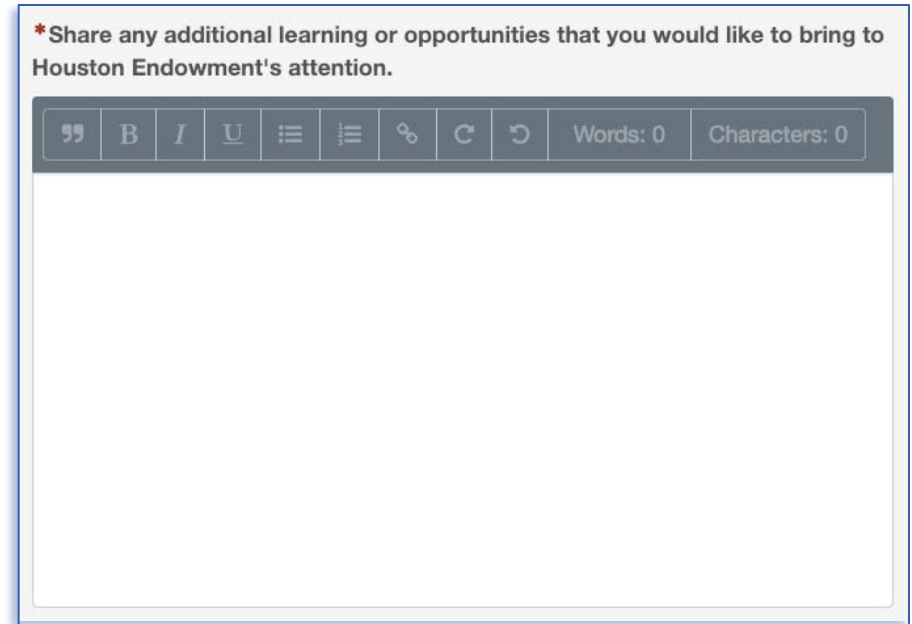
Paragraph with rich text

Paragraph fields are provided for prompts that require longer responses.

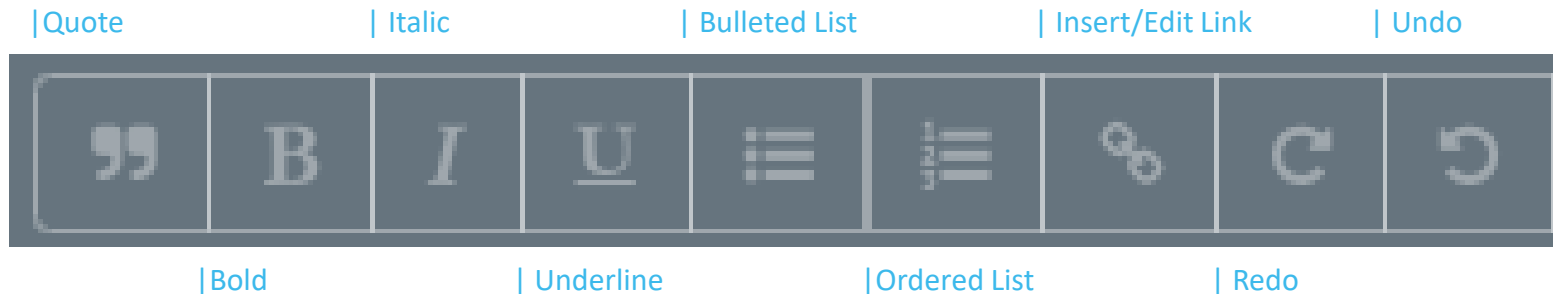
In addition to providing more space for your answer, they also include a grey formatting bar and a live word and character count.

The grey box labeled **Characters** provides a live count of your characters.


The grey box labeled **Words** provides a live count of your words.



Formatting bar symbols



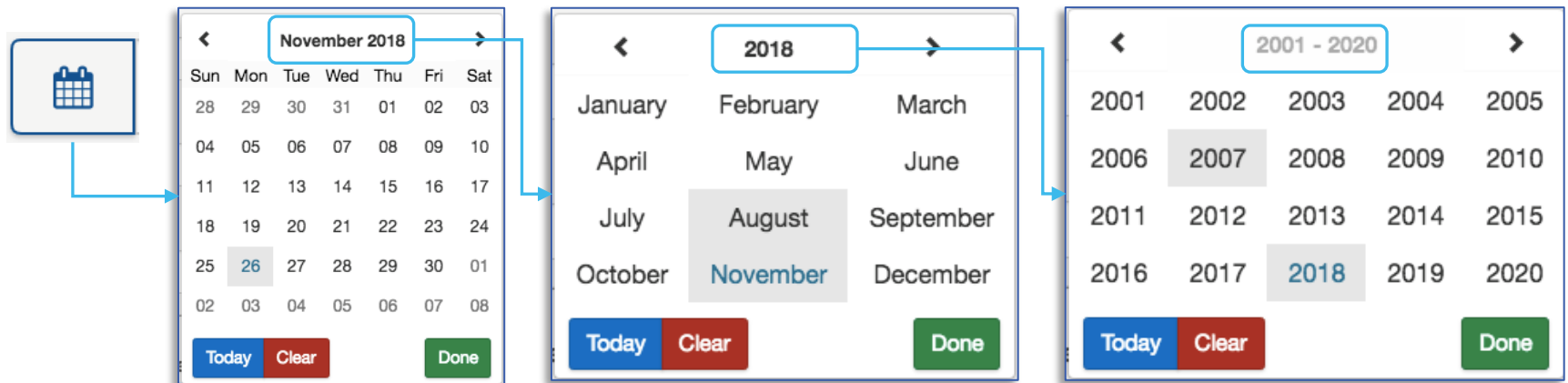
Field Type: Date

Date fields include a calendar select tool. It is indicated by a calendar icon . Clicking the icon. A calendar select tool (shown below) will open to a view of the current month.

You can use the arrows to navigate backward or forward in time.



To quickly navigate to different months or years, click the text (between the arrows) to view the level up. For instance, in the example below, if you are in a date view, clicking November 2018 will open a list of months; clicking 2018 will open a list of years. You can drill back down by selecting a Year, Month, and finally the day.




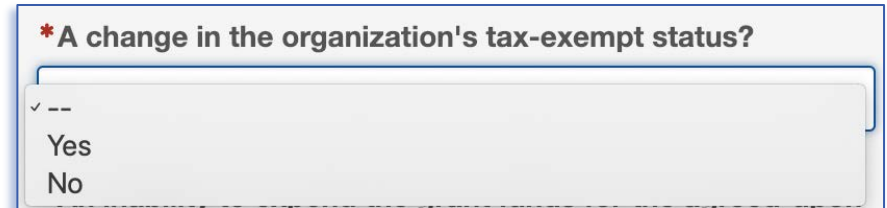
Other quick navigation options include clicking the blue **Today** button to select today's date or clicking the red **Clear** to start over.

Once you've selected the date you want, click **Done** and the selected date will populate the field.

Field Type: Dropdown Select and Upload

Dropdown select

These fields are indicated by the presence of arrows () on the right side of the field. Click in the field to expose the dropdown menu. Select one of the options displayed.



* A change in the organization's tax-exempt status?

--

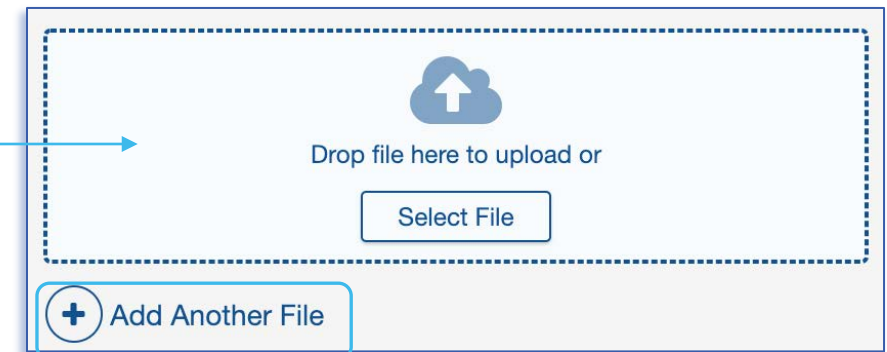
Yes

No

Upload

Within forms, you may be prompted to upload documents. When you see the upload box (right), you can either drop the file you want to upload by dragging it into the blue box or click **Select File** to open a window and search your computer's files.

We accept documents in the following formats: .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .ppt, .pptx, and .pdf. Please do not include special characters (i.e., # : % * / (|) > ? +) in your file names.



Drop file here to upload or

Select File

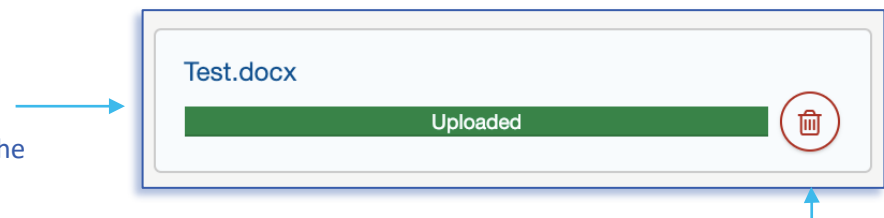
+ Add Another File

If only one box is present and you need to add additional files, click **Add Another File**. (Note: The system prevents you from uploading a document more than once. Each file name must be unique.)

A successful upload will be indicated by:

- the document name appearing as a blue hyperlink and
- a green bar labeled "Uploaded".

Remove an uploaded item by selecting the red trash can next to the green bar.



Test.docx

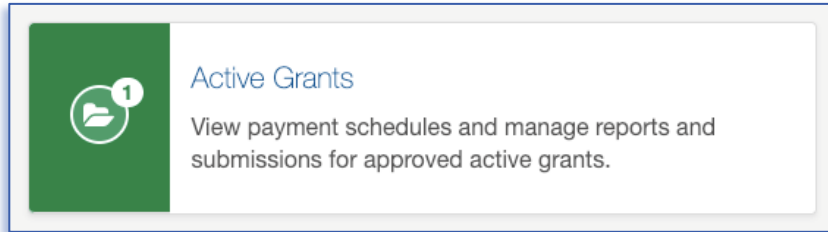
Uploaded

REPORTS & FORMS OVERVIEW



Accessing Reports

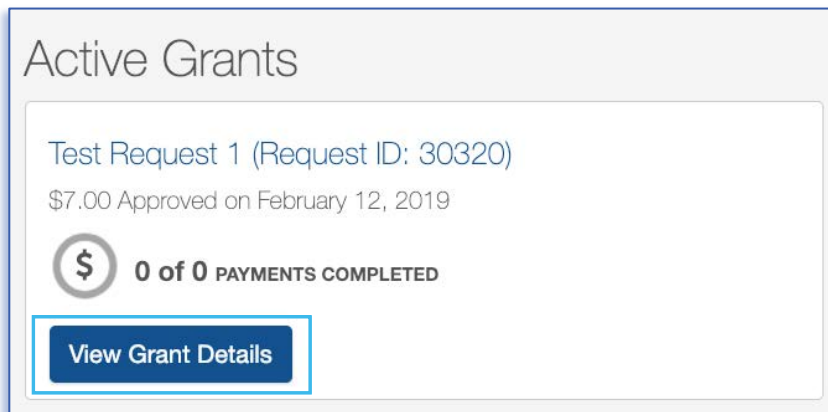
1 After logging in select **Active Grants** from any of the menus.



The image shows a menu item for 'Active Grants'. It features a green square icon with a white document and a '1' in a circle. To the right of the icon, the text reads 'Active Grants' and 'View payment schedules and manage reports and submissions for approved active grants.'

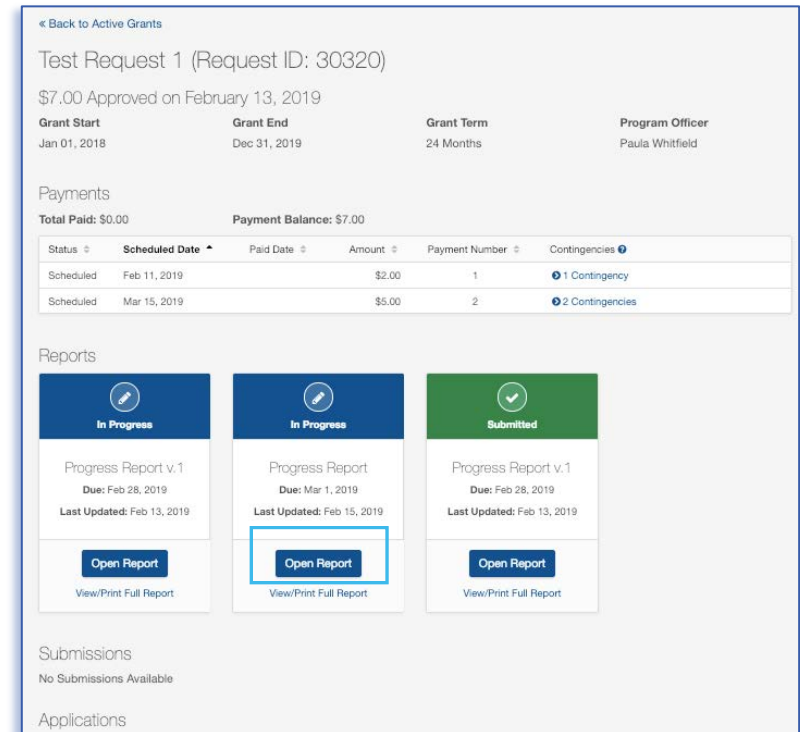
2 This will take you to a page that displays your active grant(s).

Locate the grant for which you want to submit a Report. Click **View Grant Details**.



The image shows the 'Active Grants' detail view for 'Test Request 1 (Request ID: 30320)'. It displays '\$7.00 Approved on February 12, 2019' and a progress indicator showing '\$ 0 of 0 PAYMENTS COMPLETED'. A blue button labeled 'View Grant Details' is highlighted with a red box.

3 From the detail view, scroll to the Reports section. Identify the correct report and click **Open Report**.



The image shows the 'Test Request 1 (Request ID: 30320)' detail view. It includes a 'Payments' table and a 'Reports' section. The 'Reports' section contains three report cards: 'In Progress' (Progress Report v.1, Due: Feb 28, 2019), 'In Progress' (Progress Report, Due: Mar 1, 2019), and 'Submitted' (Progress Report v.1, Due: Feb 28, 2019). The 'Open Report' button for the second report is highlighted with a red box.

Status	Scheduled Date	Paid Date	Amount	Payment Number	Contingencies
Scheduled	Feb 11, 2019		\$2.00	1	1 Contingency
Scheduled	Mar 15, 2019		\$5.00	2	2 Contingencies

This will take you to the Introduction for the Report you selected.

Note that this view displays the due date for the Report.

Overview

Reports open with an **Introduction** step.

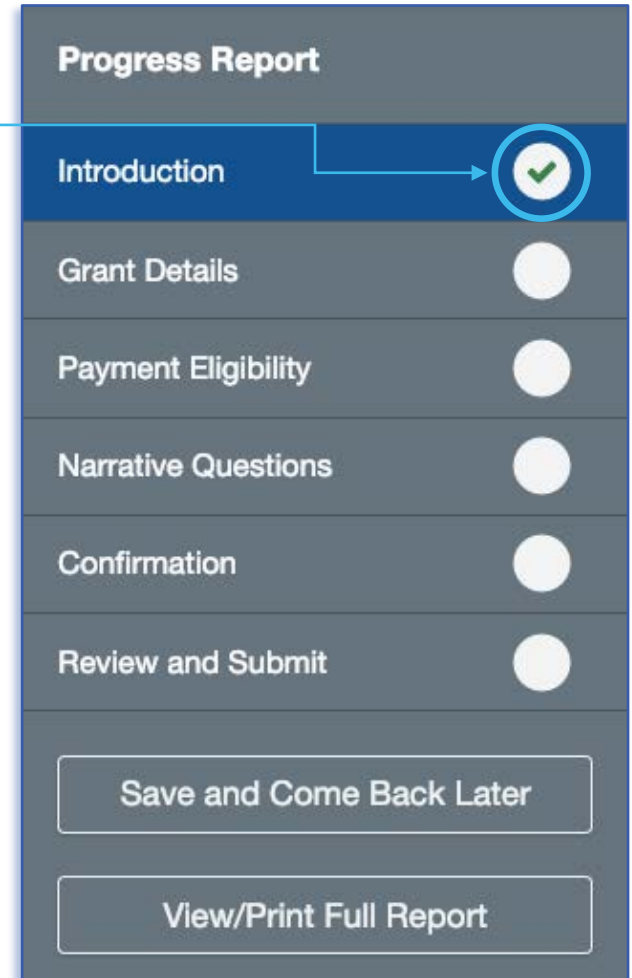
Note that the Introduction step in the tab menu has a green check mark. This is always the case because there is no action for you to complete on this step. As you complete the required fields on other steps, check marks will appear in the corresponding circle (or, if you flag the step, an orange flag will display). All steps must be marked complete (with a green check mark) before you can submit a report.

A Report has three (3) main steps.

- 1. Grant Details:** This section contains fields related to the receipt and use of funds from Houston Endowment within the past year.
- 2. Payment Eligibility:** This section contains a series of “Yes” or “No” questions related to your organization and expenditures of the payments received thus far. If you answer “Yes” to any of the questions, text and upload fields are available for you to provide an explanation.
- 3. Narrative Questions:** This section contains text-entry fields with prompts asking for updates on your work, including activities and learnings.

During the **Confirmation** step, you will be asked to confirm that you are authorized to submit the report and the contents are true.

As a final check, the **Review and Submit** step displays the number of completed steps, as well as any steps flagged for further attention. If you are satisfied with the report and all steps have been completed, you can submit the report.



Mobile or Condensed View

Reports will appear differently on mobile devices and condensed web-browser views. In addition, the tab menu that displays at the right will be hidden in a blue hamburger/drawer menu. Click on the blue icon, and a menu will slide out from the right side of the screen. Click it again to hide it.

The blue icon also displays which step out of the total steps you are currently viewing. In the example included here, it is the first of six steps (1/6).

HOUSTON ENDOWMENT Grantee Portal

Portal Test Organization

Introduction

Grant Details

Payment Eligibility

Narrative Questions

Confirmation

Review and Submit

Save and Come Back Later

View/Print Full Report

Step 1: Grant Details

Complete each of the required fields (*). This step contains number, date, and paragraph fields.


You may need to refer to financial information to complete this step.

If you need to return to this step, use the check box at the bottom of the page to Flag this step.

Flag this step ?

When you are ready to move on, click **Next** at the bottom of the page to move to the next step.

Grant Details




Funds awarded: \$7.00 **Grant Purpose:** Test Request 1


* Grant funds received from Houston Endowment this past year:

* Grant funds from Houston Endowment expended this past year:

* Funds remaining:

If you have unspent funds, by when do you plan to spend them?


If you have funds remaining, please list, with amounts, how you intend to use them.



Flag this step ?

Step 2: Payment Eligibility

Complete each of the required fields (*). Use the scroll bar to view all questions.

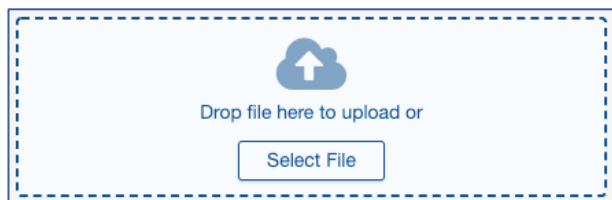
Click on the arrows at the right of the field to expose the dropdown options for each response. Select the appropriate response.

If you respond yes to any of the questions, please use the text and/or upload fields to add an explanation.

Remember, if you need to add more than one attachment, click **Add Another File**.




An additional Upload field will appear.



Payment Eligibility

Please respond to the following questions by selecting yes or no from the drop-down menu.



Since the last payment, has there been:

- * A change in the organization's tax-exempt status?
 --
 Yes
 No
- * An inability to expend the grant funds for the agreed-upon purpose?
- * Any expenditure from grant funds not made in furtherance of the agreed-upon purpose?
- * A change in 20% or more of the organization's board members?
- * A change in organizational leadership?

Step 3: Narrative Questions

Use the paragraph fields to answer the narrative questions.

Note: Required fields are indicated by the red asterisk (*).

For details on how to use the formatting bar, refer to page 16 of this guide.

Narrative Questions

 ***Please provide a general update on the work of your organization since you last applied or reported.**

” B I U ☰ ☷ 🔗 ↺ ↻ Words: 0 Characters: 0

***Provide an update on the specific project or program for which you received funding. Has the project or program been completed? If so, provide a summary of the work that was accomplished and the benefits currently being provided as a result. If the project or program has not been completed, provide a report on the progress of the initiative thus far and detail what work remains.**

” B I U ☰ ☷ 🔗 ↺ ↻ Words: 0 Characters: 0

Step 4: Confirmation


After you complete all previous steps, you will be asked to verify the information entered in other steps.

Read each statement carefully. If you agree, click the check box next to each one. Then add your initials to the text field and click **Next**.

Not done? Return to a previous step or revisit a flagged step by using the **Back** button or clicking on the appropriate step from the tab menu.

Confirmation

Please check the box next to each statement confirming you are in agreement.



I attest that the organization, programmatic and financial information being submitted in this report is true and accurate to the best of my knowledge.

I attest that I am authorized to submit this report on behalf of this organization.

***Initials:**

Progress Report

Introduction	<input checked="" type="checkbox"/>
Grant Details	<input checked="" type="checkbox"/>
Payment Eligibility	<input checked="" type="checkbox"/>
Narrative Questions	<input checked="" type="checkbox"/>
Confirmation	<input type="checkbox"/>
Review and Submit	<input type="checkbox"/>

Save and Come Back Later

View/Print Full Report

Final Step: Review and Submit

Review and Submit displays the percent and number of steps completed and the number of flagged steps.

If all steps have green check marks and are completed to your satisfaction, submit your report by clicking the green **Submit** button. (This button will be shaded grey until all steps are completed.)

Note: You will not be able to make edits after you click Submit. If you need to make a change after you submit the report, please email grantsupport@houstonendowment.org.

Review and Submit

Complete all steps and remove flags before submitting the Report.

100% 5 of 5 STEPS COMPLETED

0 STEPS FLAGGED

Back Submit

Progress Report

- Introduction ✓
- Grant Details ✓
- Payment Eligibility ✓
- Narrative Questions ✓
- Confirmation ✓
- Review and Submit ●

Save and Come Back Later

View/Print Full Report

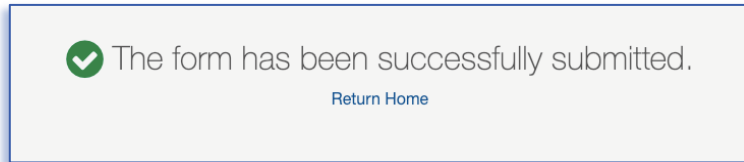
GivingData

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Privacy Notice

All changes saved

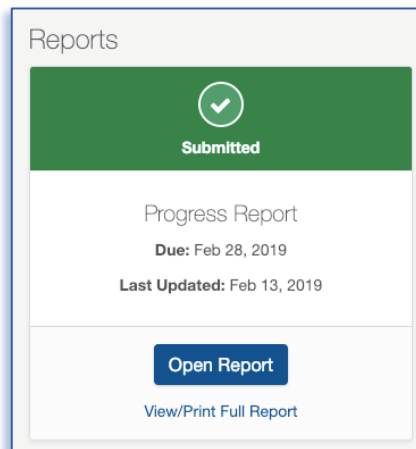
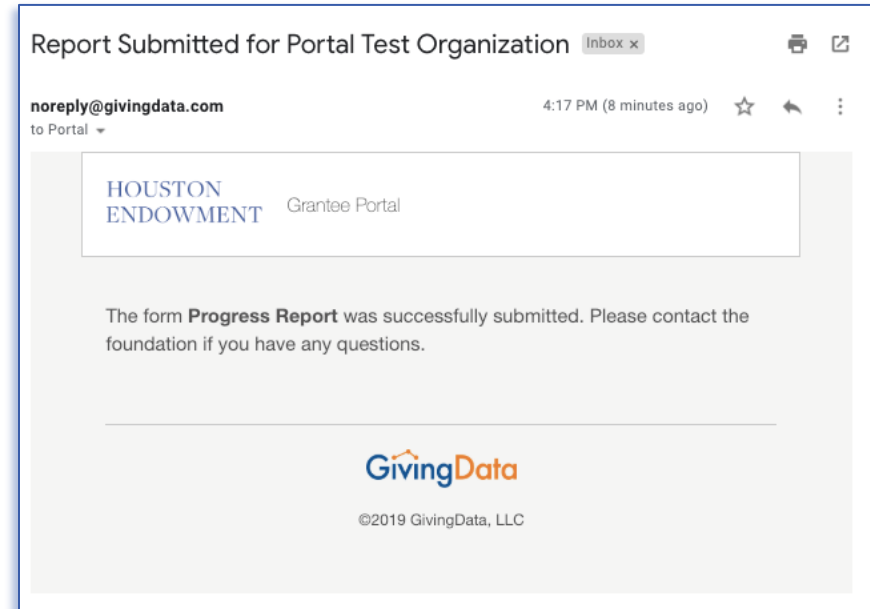
Successful Submission



After you click **Submit**, you will be redirected to a confirmation screen (above).

You can use the **Return Home** link to go to the Grantee Portal Home page or use the top menu to navigate the portal.

You will also receive a confirmation via email (right).



In the Reports section of the Grant Details (in Active Grants) you will see your submitted reports under Reports. The icon will be green to indicate that it has been submitted (left). From here you can **View/Print Full Report** or **Open Report** as read-only.

If you need to make any changes to your report, contact grantsupport@houstonendowment.org or call (713) 238-8150.

FREQUENTLY ASKED QUESTIONS



What kinds of documents can I attach in GD?

We accept the following kinds of document formats: .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .ppt, .pptx, and .pdf. Please do not include special characters (i.e., # : % * (|) > ? +) in your file names. Each file name must be unique.

Are all data fields within the online form required? How do I know which ones are required and which ones are not?

Not all fields are required. A red asterisk (*) will indicate a required field.

Can I preview the questions that I will be required to complete?

Yes. Information about typical questions is found within this guide. You can also preview the form and print it once you are in the system by clicking View/Print Full Application.

Can I copy and paste information from other documents into the online portal question fields?

Yes. The system allows you to copy and paste information from other documents, however, you must choose to **paste the text as "plain text."** PC users – right click and choose "paste as plain text" or "keep text only." Mac users – right click and choose "paste and match with style."

Are there word or character limits on my responses?

No, there are no word or character limits on any of the paragraph fields. Please try to be as concise as possible while answering the question completely. For the longer paragraph fields, we ask that you limit your responses to 10 sentences.

Do I have to complete the entire grantee report in one sitting?

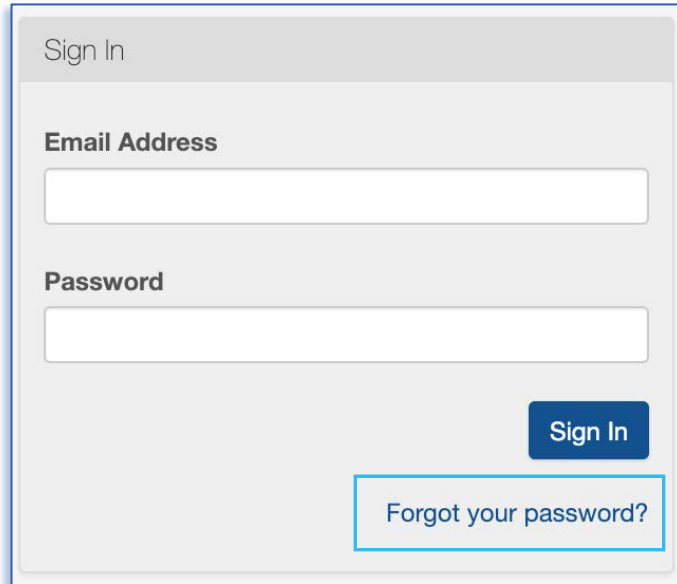
No. You may log in and out as often as you like. Answers autosave as you work. (Text in the lower left of the screen will indicate when the system is saving your responses and when your changes are saved.)

I don't have the Chrome Browser. Can I use this portal?

Yes. GivingData works in other browsers. You can use your preferred browser, or, if you want to install Chrome, visit www.google.com/chrome and follow the instructions.

If you have questions about the system, please refer to our website (www.Houstonendowment.org), email grantsupport@houstonendowment.org, or call (713) 238-8150.

Forgot your password?



Sign In

Email Address

Password

Sign In

[Forgot your password?](#)

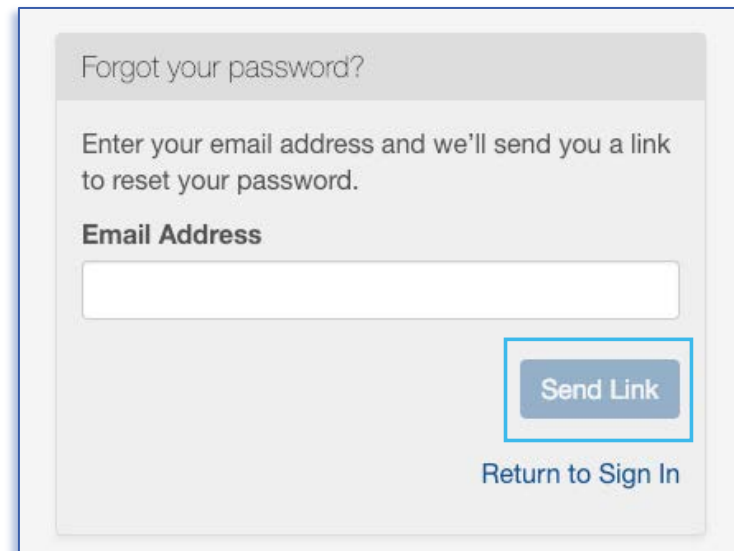
If you forget your password, don't worry. You can easily reset it yourself.

From the Sign In page (houston-portal.givingdata.com) click **Forgot your password?**

It will take you to a new window where you can:

- Enter your Email Address in the box.
- Click **Send Link**.

A green box will appear at the bottom left of your screen confirming that an email was sent to the email address you entered. Follow the instructions in the email you receive to reset your password.



Forgot your password?

Enter your email address and we'll send you a link to reset your password.

Email Address

Send Link

[Return to Sign In](#)