

Houston Endowment

Grant Management System (GMS) Technical Guide

PURPOSE OF THE TECHNICAL GUIDE

The purpose of this guide is to provide support with system access and navigating Houston Endowment's grant application and reporting software, Grant Management System (GMS). If you have any questions related to the application itself, or are unsure about reporting inputs or selections, please visit our website for more information or contact your program officer.

SYSTEM ACCESS – LOGGING INTO GMS

Organizations that have previously submitted a grant application to Houston Endowment will have an organizational account within GMS. Each account has a Primary Account Holder who has the ability to establish login credentials for new users, add or delete users, or update the organization contact information. GMS allows multiple individuals within the organization to have login credentials; however, those credentials must be established solely by the Primary Account Holder.

Usernames are email addresses. Passwords require a minimum of 6 characters.

Returning User

If you have logged into GMS previously, please enter your username and password under the Returning Applicants section.

If you do not remember your login credentials, please do the following:

- Utilize the options available for Login Help within GMS (link)

Welcome to Houston Endowment's online Grant Management System.

RETURNING APPLICANTS

Login below to access your account.

* Username:

* Password:

Remember Me

Login Help

[Forgot Password](#)

[Forgot Username](#)

- Contact the Primary Account Holder within your organization; that individual can provide you the email address used for the username as well as reset the password; or
- Contact grantproposal@houstonendowment.org with the organization's name and the name and/or email of the impacted account along with a brief explanation of the assistance needed.

New User

GMS allows multiple individuals within the organization to have login credentials. However, the Primary Account Holder will need to add a new user to the account and establish login credentials. If you are having trouble determining who the Primary Account Holder is within your organization, or that person has left the organization, please email grantproposal@houstonendowment.org and provide the organization's name along with a brief explanation of the assistance needed.

Account users may log in and log out as often as needed. Remember to save changes to any in-process document before logging out.

Troubleshooting Issues

The GMS software was designed to work in all web browsers; however, over time changes to browsers may have impeded access. Occasionally, a problem accessing GMS is caused by the web browser. If you are experiencing issues accessing the website using Internet Explorer, try to clear cookies using the instructions below or switch to Chrome or Firefox browser.

Computing settings vary from one organizations to the next and may require that organization's IT professional for resolution. However, clearing cookies can often address browser issues.

Steps to clear cookies in Internet Explorer:

Step One: Go to the Control Panel.

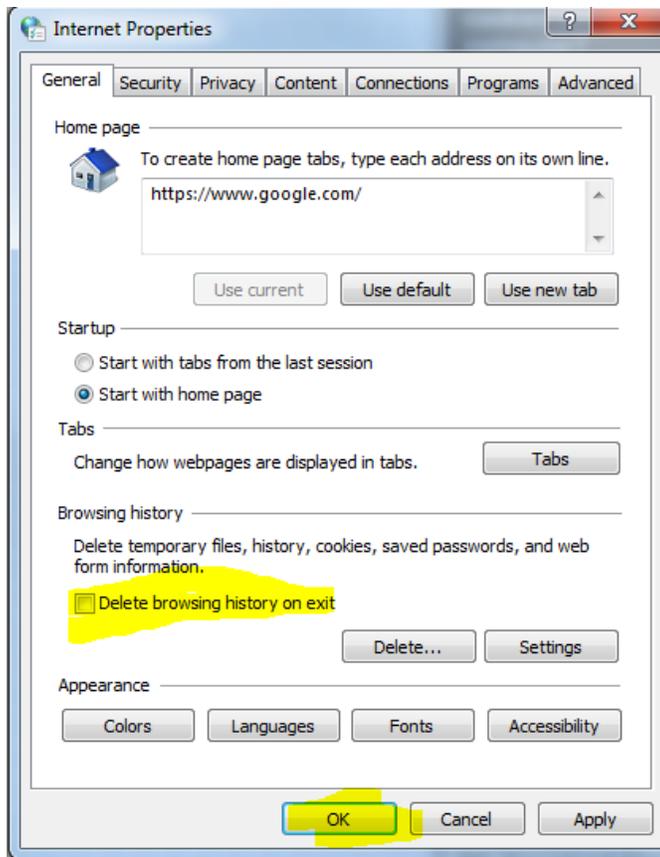
Step Two: Double click Internet options.

Step Three: Under the General Tab, you will see 'Delete temporary files, history, cookies, saved passwords...' Click Delete.

Step Four: The Delete Browsing History dialog box will appear. Click the 'cookies' checkbox.

Step Five: Click the delete button at the bottom of the dialog box.

Step Six: You will be taken back to the Internet properties dialog box. Click 'ok.'



Always consult your organization's IT support when making any changes to your system.

REPORTING GUIDELINES – COMPLETING REPORTS IN GMS

When you log in to GMS, a popup box such as the one below will typically appear:

The screenshot displays the Grant Management System (GMS) interface for the Houston Endowment. The header includes the title "GRANT MANAGEMENT SYSTEM" and "HOUSTON ENDOWMENT" along with navigation links for "Houston Endowment", "Contact Us", and "Log". Below the header is a navigation menu with "MY PROFILE", "APPLICATION GUIDELINES", and "FAQ". A "MY ACCOUNT" sidebar on the left lists user details for Tom Nail (email: heigrants@gmail.com, phone: (713) 238-8121) and provides links for "Edit" and "Change Password". A "popup box" is overlaid on the main content area, titled "Updated Type of Investment Options". The message in the popup states: "Please note that Type of Investment option for Innovative Approaches has been removed. Please review the Types of Investments on our website to determine the option that meets the criteria for the purpose of your grant request." An "OK" button is located at the bottom left of the popup. Below the popup, the main content area contains a "Log out then log back in at any time." message, a link to "Click here to start a new Application", and a section titled "Return To An Application In Process" with instructions on how to edit an application in progress.

Please take a moment to read the information in the popup box regarding new and/or important information on the site. Click 'OK' to close the popup box.

Scroll down to the Completed section, which contains a list of submitted applications for this organization. All approved applications will have the word 'Report' about the grant title.

Houston Endowment Contact Us Logout

GRANT MANAGEMENT SYSTEM

HOUSTON ENDOWMENT

MY PROFILE
APPLICATION GUIDELINES
FAQ

MY ACCOUNT
 Tom Nall
 tignants@gmail.com
 tel: (713) 238-8121
 fax:
 edit | Change Password

ADD/EDIT ACCOUNT HOLDERS

Start A New Application

You will begin at the eligibility quiz. From the results of the quiz, you will be routed to either a full application or a pre-application. Before you begin, we recommend you review Houston Endowment's basic eligibility requirements and grantmaking priorities outlined in our Application Guidelines. Also, you may find the answers to many of your procedural questions in our FAQs Tips & Resources sections. You may stop and start within the application process as needed, and log out then log back in at any time.

[Click here to start a new Application](#)

Return To An Application In Process

To return to an application still in process, login and click EDIT below the description of the application in the In Process box. Note: Once an application has been submitted, it can no longer be edited or changed.

Production Data - Test Account				
In Process				
Test 7/27				
Edit View/Print				
Pre-Application	2016-209-0226	In Process		\$0
In For Review				
Project Title				
View/Print				
Pre-Application	2016-195-0224	Submitted For Review		\$100
Completed				
Test 9/14				
View/Print Report				
Grant Application	2016-258-0117	Approved		
Test 7/27				
View/Print				
Grant Application	2016-209-0114	Submitted For Review		\$1

Select the appropriate grant, then click on the word 'Report' to navigate to the Grant Reports Page where you will see a list of all reports due for the grant you selected. If a grant has not been approved, you will not be able to select the Report feature.

The Grant Report page will include a list of all reports due for that particular grant. As the report due date approaches, the word 'Edit' will appear. Click on 'Edit' to begin or update the grant report.

GRANT MANAGEMENT SYSTEM

Houston Endowment

HOUSTON ENDOWMENT

MY PROFILE	APPLICATION GUIDELINES	FAQ									
Production Data - Test Account Human Services Building Capacity Test 9/14			View/Print Applicati FAQs								
<p>Thank you for providing a report on your grant from Houston Endowment. As you complete the report, you will be asked to provide general information about your organization as well as specific details about the progress of your grant. Please click "start" to begin a report or "edit" to return to a report in progress.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p style="background-color: #ffff00; margin: 0;">Grant Reports</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding: 2px;"> <div style="background-color: #ffff00; padding: 2px;">Due: 9/30/2016</div> Edit Print </td> <td style="width: 30%; padding: 2px;"> Capacity Building Help </td> <td style="width: 20%; padding: 2px; text-align: center;"> <div style="background-color: #ffff00; padding: 2px;">In Progress</div> </td> <td style="width: 20%; padding: 2px;"> 2016-258-0117-01 </td> </tr> <tr> <td style="padding: 2px;"> <div style="background-color: #ffff00; padding: 2px;">Due: 11/30/2017</div> <div style="border: 1px solid red; border-radius: 50%; padding: 2px; display: inline-block;">Available on 2/28/2017</div> </td> <td style="padding: 2px;"> Capacity Building Help </td> <td style="padding: 2px; text-align: center;"> Not Started </td> <td style="padding: 2px;"> 2016-258-0117-02 </td> </tr> </table> </div>				<div style="background-color: #ffff00; padding: 2px;">Due: 9/30/2016</div> Edit Print	Capacity Building Help	<div style="background-color: #ffff00; padding: 2px;">In Progress</div>	2016-258-0117-01	<div style="background-color: #ffff00; padding: 2px;">Due: 11/30/2017</div> <div style="border: 1px solid red; border-radius: 50%; padding: 2px; display: inline-block;">Available on 2/28/2017</div>	Capacity Building Help	Not Started	2016-258-0117-02
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