



Houston  
Endowment®





# GUIDE TO:

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## **APPLICATIONS IN GIVINGDATA**





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# ACCOUNT ACTIVATION & SIGNING IN



*Please note: GivingData works best in the Google Chrome web browser.*





# INVITATION EMAIL

You will receive an email from our grants management system, GivingData, inviting you to submit an application via the portal. **Please add [mail@givingdata.com](mailto:mail@givingdata.com) and [noreply@givingdata.com](mailto:noreply@givingdata.com) to your email safe list/favorites** to ensure that you receive the invitation and other communications.

Follow the link in the email by clicking the **Open Application** button or by copying and pasting the URL below the button into your web browser. The URL is specific to your username. (Do not copy the URL in this guide.)

If you have previously registered, you can log in and proceed to the application section.

If you have not registered, you will be prompted to do so. (See page 6.)

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



Grants Management Portal

We invite you to Houston Endowment's grants management portal to complete the linked Request for General Operating Support.

**Request Reference Number:**  
**Application Due Date**

If you have questions about the portal, please contact the Grants Management team at [grantsupport@houstonendowment.org](mailto:grantsupport@houstonendowment.org) or via phone at 713-238-8150. If you have substantive questions about the information you are submitting, please contact your primary contact at Houston Endowment: Grant Associate, [grantassociate@houstonendowment.org](mailto:grantassociate@houstonendowment.org).

To complete this, please follow the link below. If you have not activated your account, this invitation will expire in 30 days.

Thank you,

Houston Endowment

Your username is: [your email address]

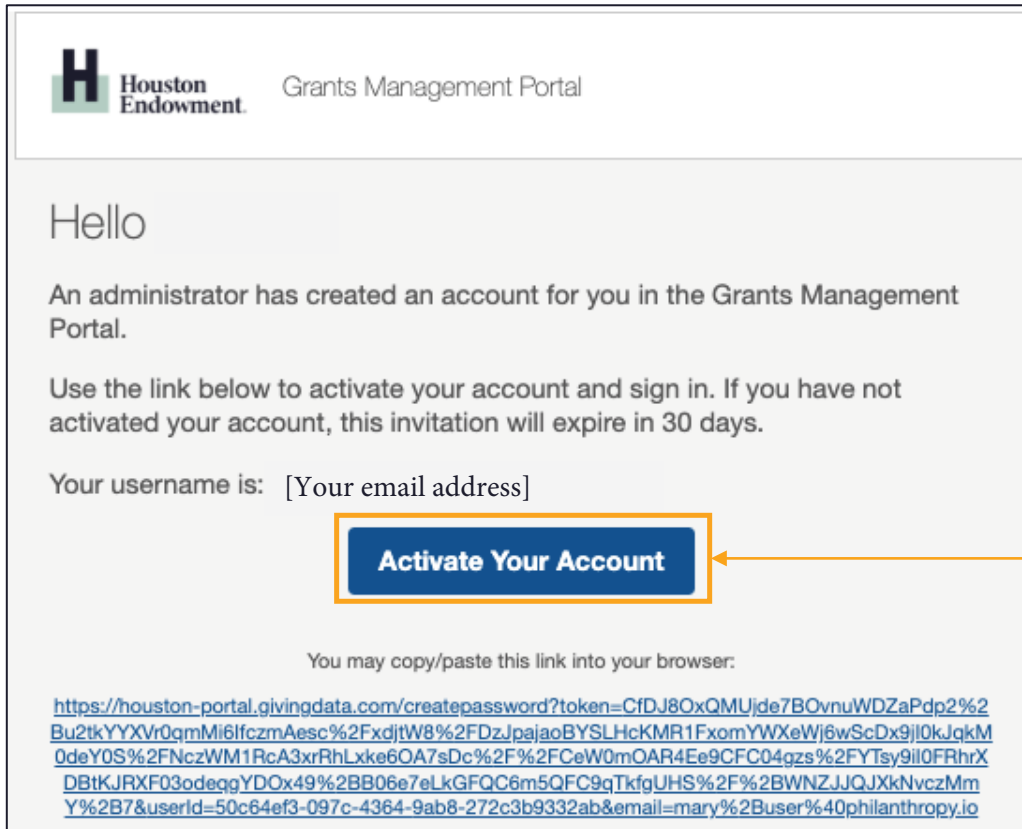
**Open Application**

You may copy/paste this link into your browser:

<https://houston-portal.givingdata.com/createpassword?token=CfDJ8OxQMUjde7BOvnuWDZaPdp2UCmowNUClwUWZD7N%2BFbXhgaTbmh%2FT56vngwLm49MfmBghjqVx55hQqV9MU34QbueMgkUN%2FzhGuU2WQtbUl%2F7s%2F1beqPlmgzpQT9giuBRVD3sZolwu87zo%2FNV0Ddj5k5NU0qvD8X3gbBzVxvAPNqc%2BZdhBH77pdSr7kBfiPdi%2FOlpow%2FyrzmrarFa7LWp5OWG669DrBf5cTf60GRRglOfDGX7vUAYjlyV4DpW%2F%2Bg4yWw%3D%3D&userId=ed291a4e-3604-452d-ac2b-c0c0142996b8&email=mary%2Bnovember%40philanthropy.io&applicationId=308&intakeEntryId=3979>



# ACCOUNT ACTIVATION EMAIL



If you are new to the system, you may also receive an email inviting you to activate your portal account.

From the body of the email you can click the **Activate Your Account** button to go directly to the site.

If the button does not work, copy the URL and paste it into a browser. (Do not copy the URL shown in this guide as each URL is unique to the user.)



# CREATE A PASSWORD

If you do not already have an account associated with your email address, when you visit the URL included in the Account Activation email or the Invitation email, you will be prompted to create a password, as depicted in the image below. (If you already have an account, you will see a sign in screen; see the next page for information on signing in.)

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

Before creating a password, please note the password requirements:

- At least 6 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.

The screenshot shows the 'Create Password' form within the Houston Endowment Grants Management Portal. The form includes a header with the Houston Endowment logo and the portal name. The main heading is 'Create Password'. Below this, a message states: 'Create a password to sign in with the account [your email address]'. There are two input fields: 'Password' and 'Confirm Password'. A blue 'Save' button is located at the bottom right. Three orange numbered circles (1, 2, 3) are overlaid on the form to indicate the steps: 1 points to the Password field, 2 points to the Confirm Password field, and 3 points to the Save button.





# 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**.

**Forgot your password?** If you forget your password, click on the link. A new screen will appear. Enter your email address and you will receive an email that contains a link to reset your password.


The image shows a 'Sign In' form with a light gray background. At the top, the text 'Sign In' is displayed in a small, dark font. Below this, there are two input fields. The first field is labeled 'Email Address' and has an orange circle with the number '1' to its left. The second field is labeled 'Password' and has an orange circle with the number '2' to its left. Below the password field, there is a blue button with the text 'Sign In' in white. To the left of this button is an orange circle with the number '3'. Below the button, there is a link that says 'Forgot your password?' in a blue, italicized font.

**Tip: Bookmark the sign in page so you can easily return to it.**  
[houston-portal.givingdata.com](https://houston-portal.givingdata.com)

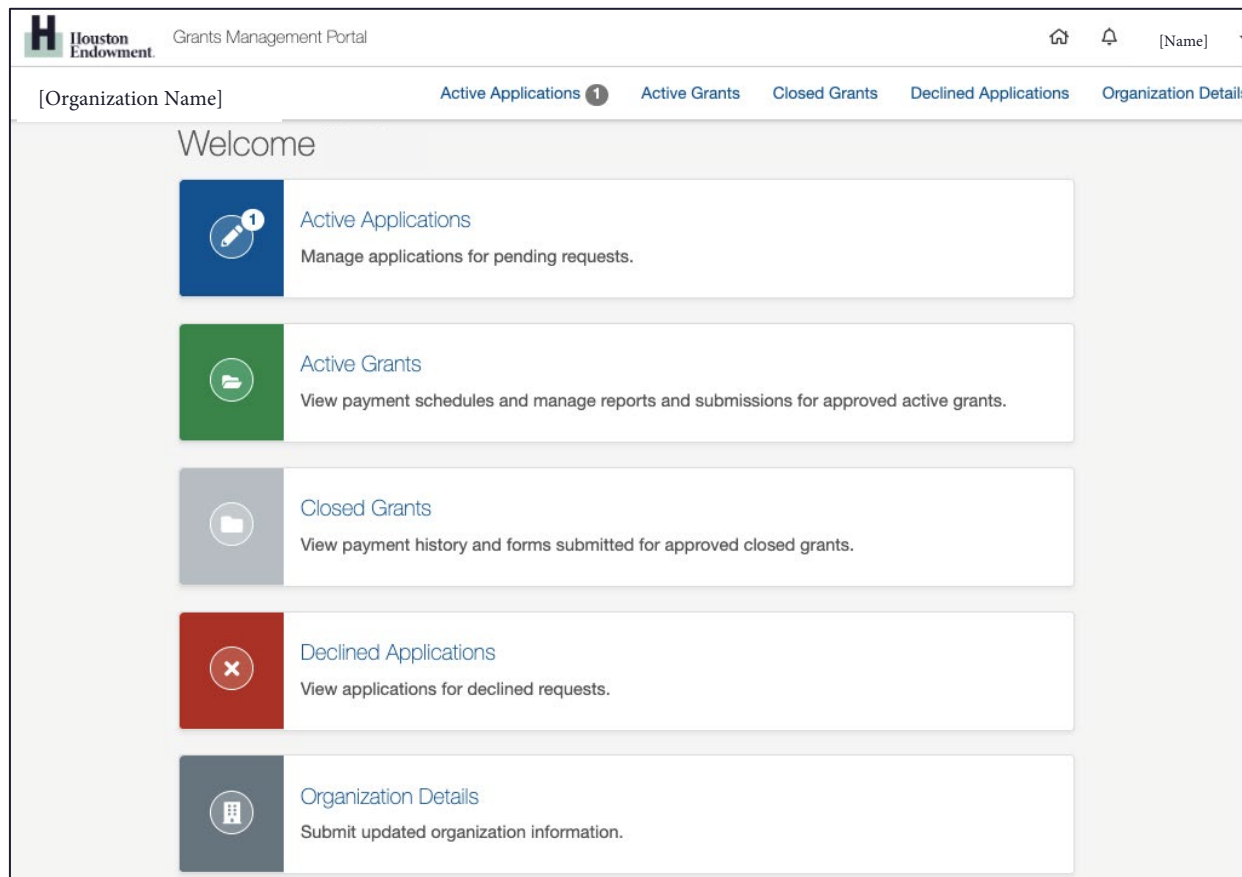


# PORTAL HOME




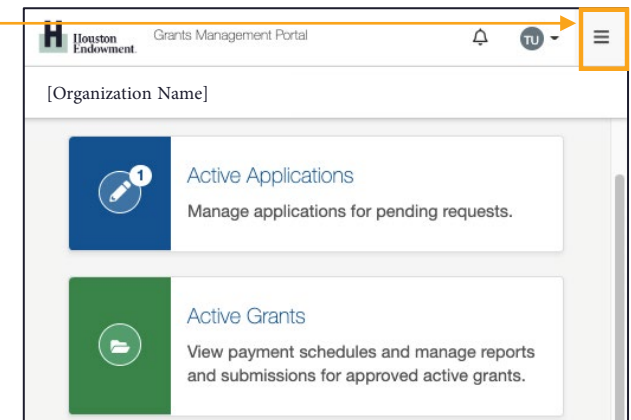
Upon login, you will see the Home page. Click  (Home) at any time to return to this view. (If your account is associated with one or more organizations, see the next page.)

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

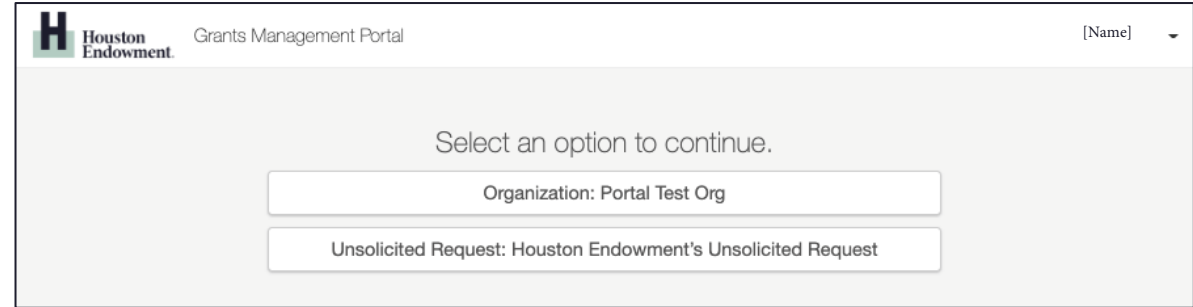
 In this view the menu is collapsed into a hamburger menu (right and below). Click on it to view the menu.





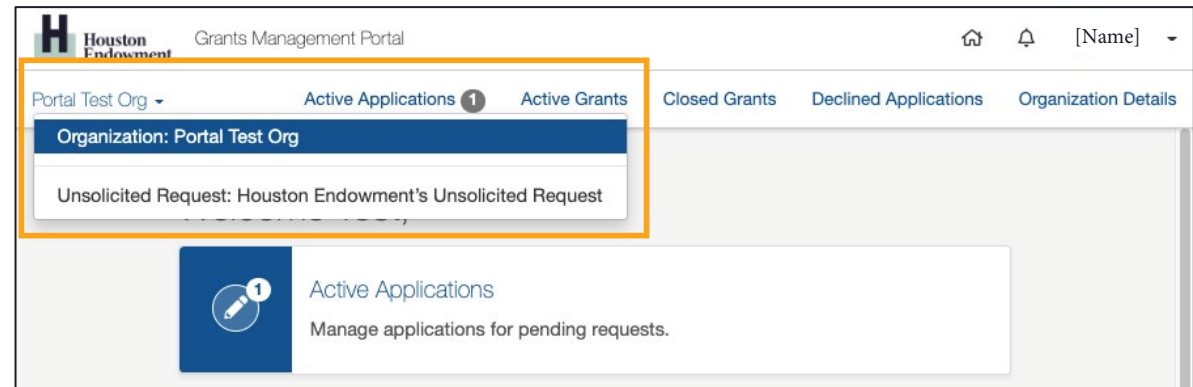
# MULTIPLE ORGANIZATIONS LANDING PAGE

If your account is associated with more than one organization or if you have created an Unsolicited Application (previously called Pre-Application), at login, before you get to the home page, you will be asked to select the organization you want to access. Click on the name of the organization to navigate to its home page.



## Switching Organizations

Once you have selected an organization and you want to navigate to another organization, click on the organization name in the upper left corner of the home page. A dropdown menu will appear from which you can select the organization you want to access.








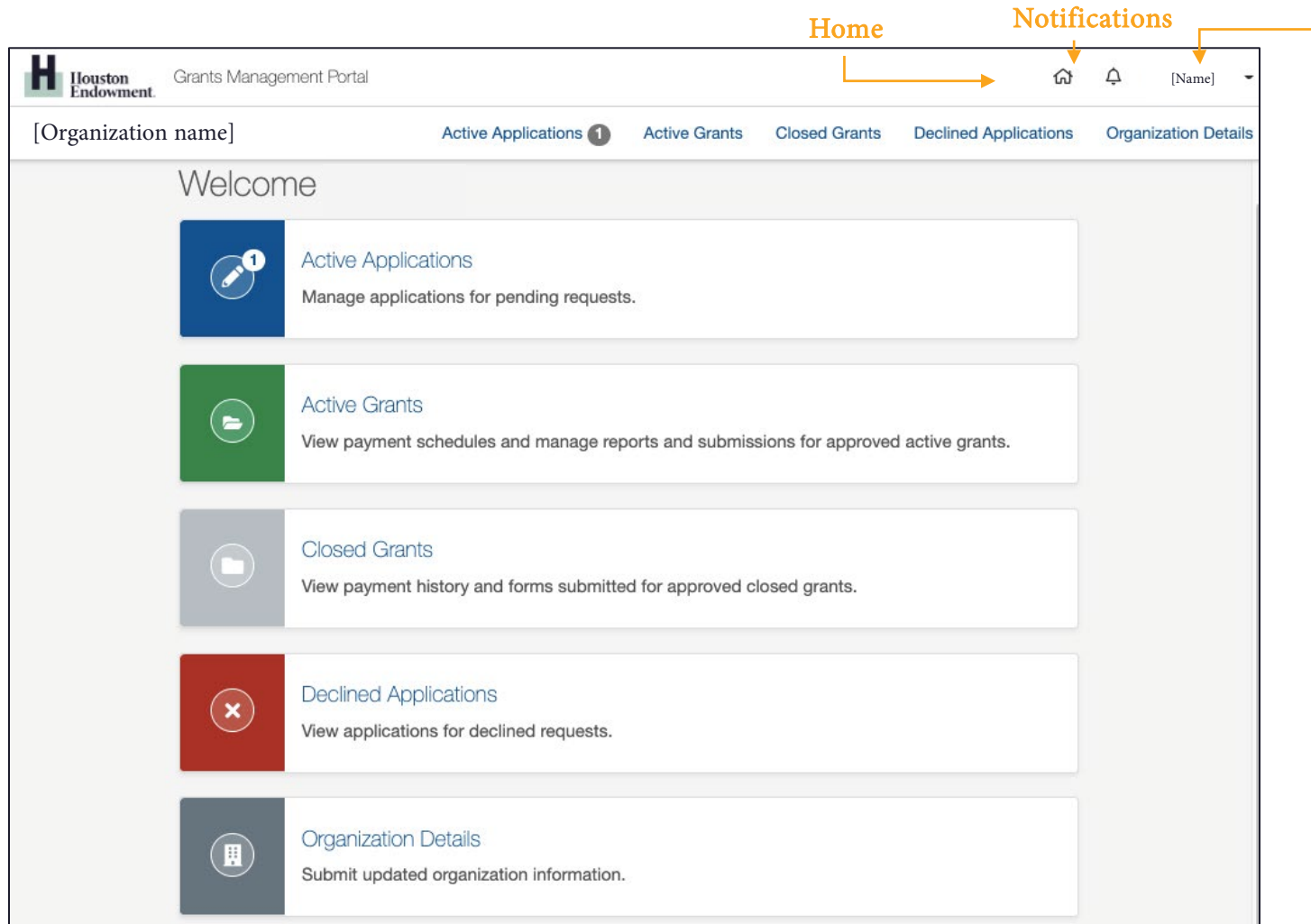
# GRANTS MANAGEMENT PORTAL OVERVIEW





# GRANTS MANAGEMENT PORTAL HOME

Upon log in 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. Click  (Home) from any page to return to this view.



## Profile

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

## Hamburger Menu
















This menu appears in mobile and condensed-web 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 tab menu. Click again to hide.
	Notifications: clicking on this icon will display a list of notifications (if any).		Hamburger Menu: click to expand and view a menu; click again to hide.
	Active Applications.		Incomplete Step.
	Active Grants.		Completed Step.
	Closed Grants.		Flagged Step.
	Declined Applications.		Pencil: click to edit a field.
	Organization Details.		Question mark: click to display a description or instructional text.
<b>All changes saved</b> You may notice activity in the lower left corner of the window. GivingData will notify you as it is auto-saving to confirm that your 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.		 Progress Indicator: in a modal (which is like a pop-up widow), this will indicate the number of steps and the current step.	



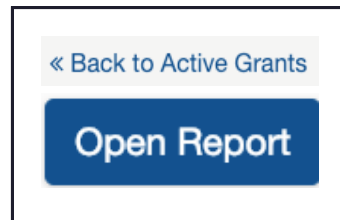


# NAVIGATION

Use the menus (Top, Dashboard, and Hamburger) to navigate throughout the portal. Each menu displays the same navigation 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.

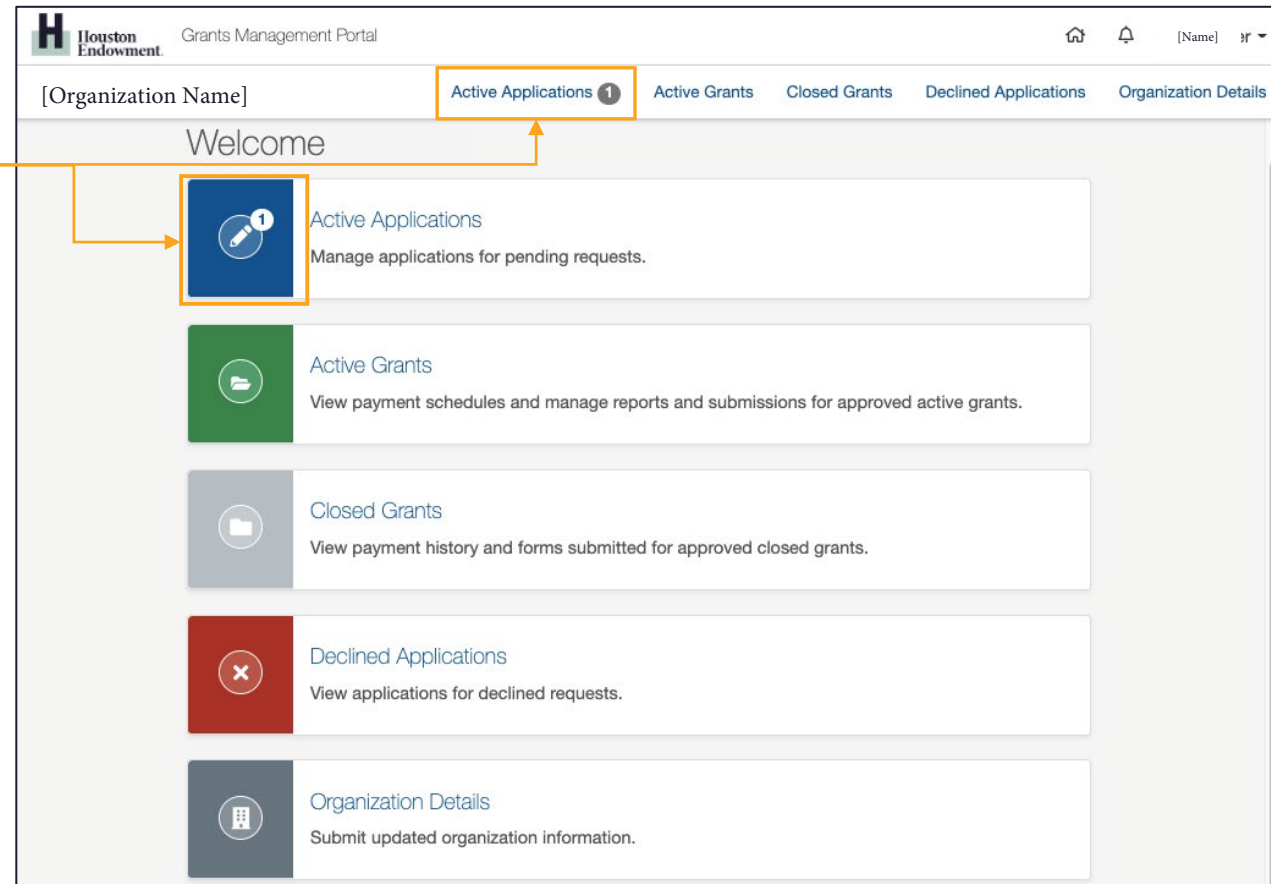
## Alert Badges

The portal uses an alert-badge system to indicate how many items you have in each category. In the example right, a 1 appears in both the top menu, Active Grants, and on the icon on the Dashboard. These alerts indicate there is one (1) active grant.



## Hyperlinks and Buttons

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







# SECTIONS

## Active Applications

If you have any pending requests for funding currently in the system, they will be listed here. Click this section to view the list and navigate to 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 view pages include general information, payment information, and forms related to the grant. Please note that 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.

## Organization Details

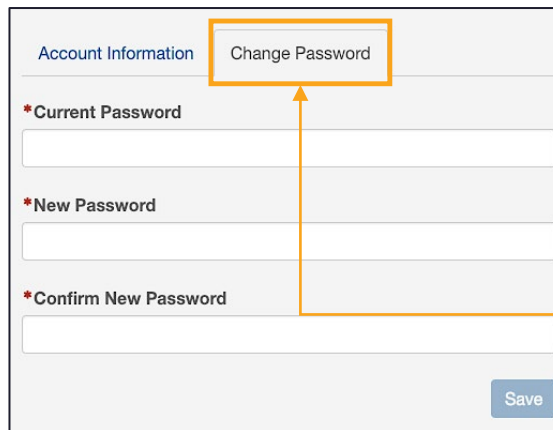
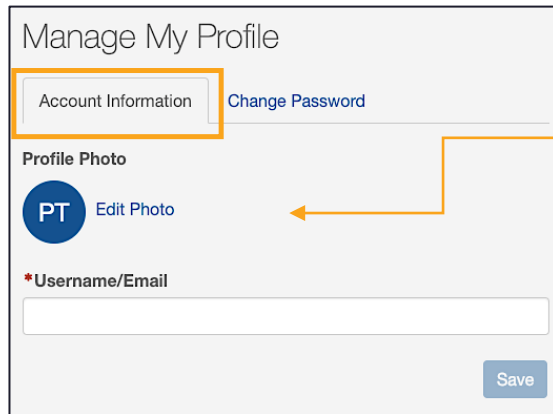
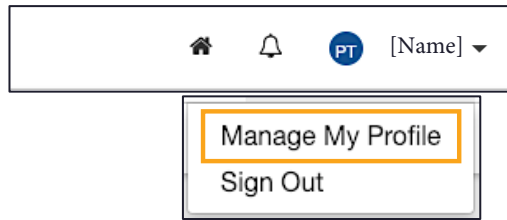
This is a space where organizations can submit updated organization information to HEI via forms.

	<a href="#">Active Applications</a> Manage applications for pending requests.
	<a href="#">Active Grants</a> View payment schedules and manage reports and submissions for approved active grants.
	<a href="#">Closed Grants</a> View payment history and forms submitted for approved closed grants.
	<a href="#">Declined Applications</a> View applications for declined requests.
	<a href="#">Organization Details</a> Submit updated organization information.





# 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

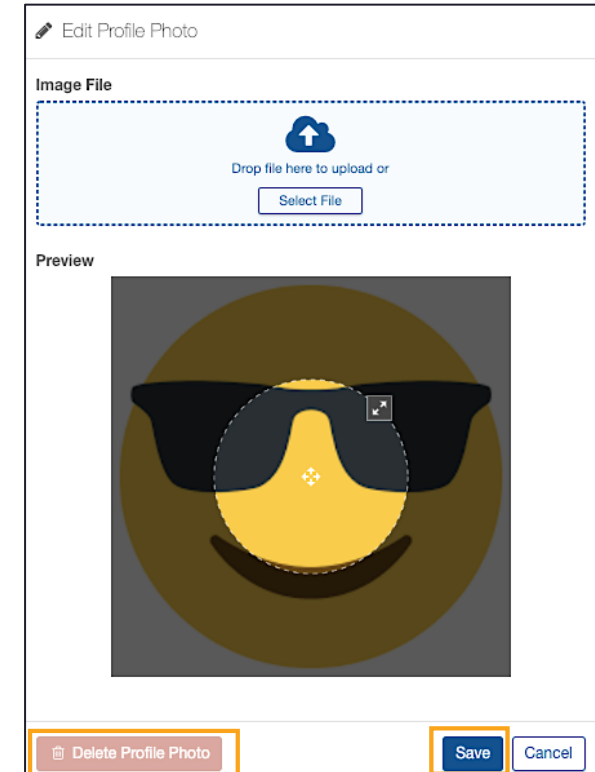
To add or edit a photo, click Edit Photo. An Edit Profile Photo modal (right) will appear.

- 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 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 8.) Click Save to save your changes.

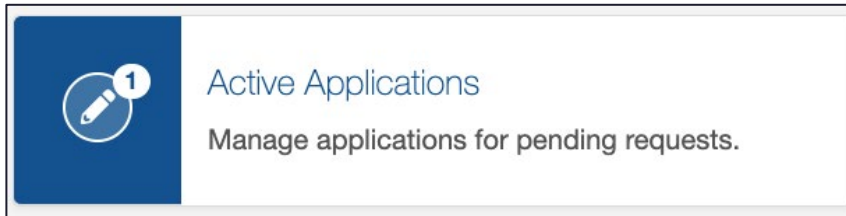
## Edit Profile Photo Modal





# ACCESSING APPLICATIONS

After logging in, select Active Applications from any of the menus.



This will take you to a page that displays your application(s).

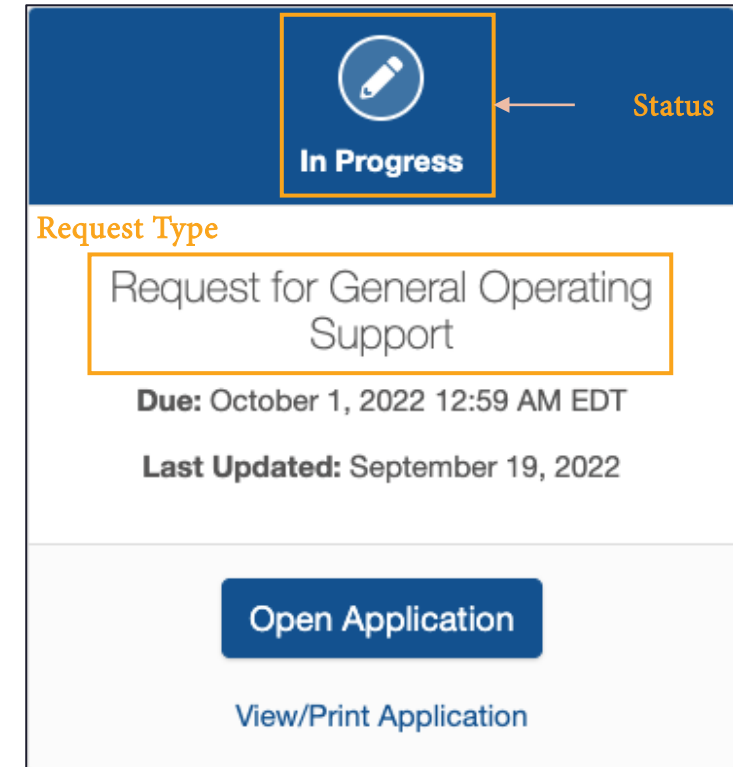
Each application will have its own tile. There are a few things to note about the tile. It displays:

- Application Title and Request ID (occasionally referred to as Request Reference Number)
- Status of the application (Invited, In Progress, or Submitted).
- Request Type (Request for...).
- Due Date including the time and time zone.
- Last Updated.

The Open Application button will take you to the application form.

View/Print Application lets you view or print the full form. When you click it, a modal will appear, and you will have the option to view (with or without your responses) or print.

Application Title and Request ID



Locate the application you want to work on and click **Open Application**.



# FORM BASICS

The following are field types you may encounter as part of the application process:

- 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

Each form gives you the option (from the tile and on the form) to View/Print Report. 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.

The diagram illustrates the form layout and user interaction points:

- Initials:** A text input field with a red asterisk (\*) indicating it is required. A diagonal line icon in the bottom right corner allows for field expansion.
- In Progress:** A status indicator with a pencil icon.
- Request for General Operating Support:** The title of the application.
- Due:** October 1, 2022 12:59 AM EDT
- Last Updated:** September 19, 2022
- Open Application:** A button to view the application details.
- View/Print Application:** A link to view or print the application details.
- View/Print Report:** A button to view or print the report.
- Include responses:** A checkbox option to include or exclude responses.
- Close:** A button to exit the modal.
- Print:** A button to print the report.





# FIELD TYPES: NUMBER, TEXT, AND CHECK BOX

## Number

Number fields are not specially marked in a way that distinguishes them from text fields. However, as you start to complete the field, the prompt will indicate if it 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.

\*Share any additional learning or opportunities that you would like to bring to Houston Endowment's attention.

” B I U ☰ ☷ 🔗 ↺

Words: 0 Characters: 0

## Formatting bar symbols

Quote Italic Bulleted List Insert/Edit Link Undo

” B I U ☰ ☷ 🔗 ↺

Bold Underline Ordered List Redo

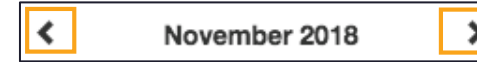


# FIELD TYPE: DATE

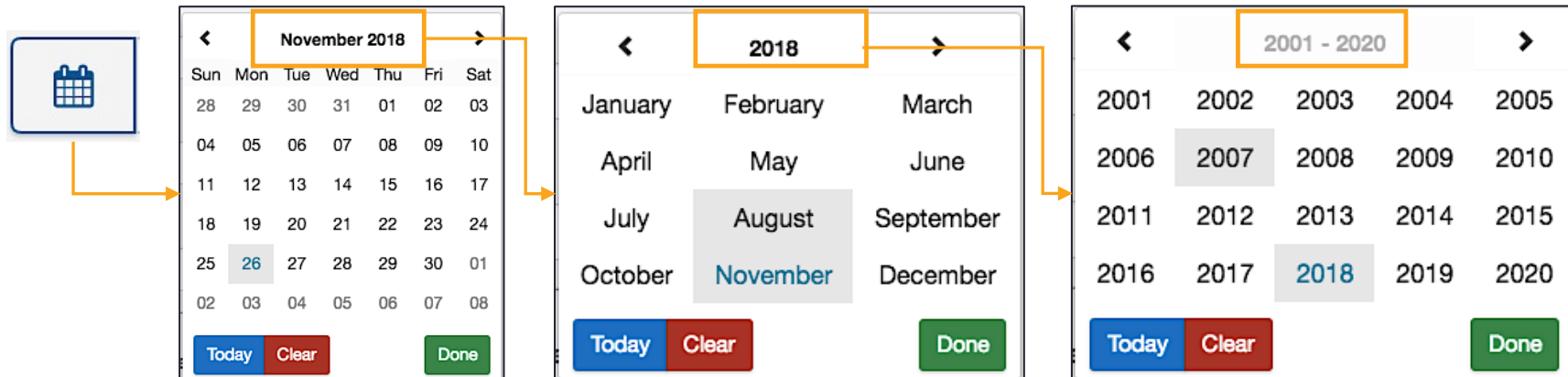


Date fields include a calendar select tool. It is indicated by a calendar icon . Click the icon. A calendar select tool (shown below) will open to a view of the current month.

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.

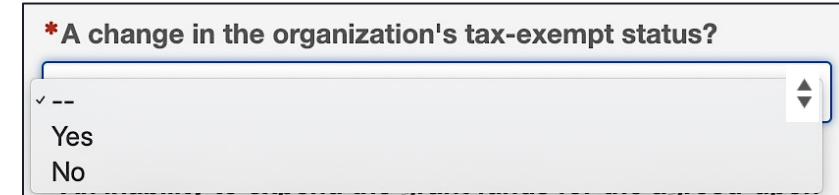


# FIELD TYPES: DROPDOWN SELECT AND UPLOAD



## 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.



## Upload

Forms may prompt you to upload documents. When you see the upload box (right), you can either drag and drop the file into the box or click Select File to open a window and browse your computer's files.

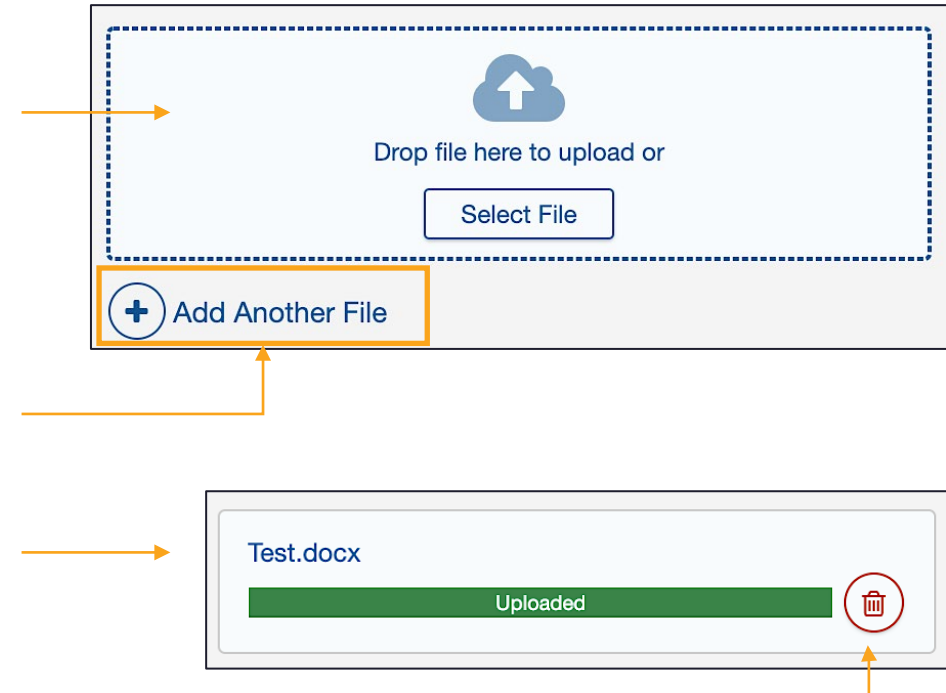
The system accepts documents in the following formats: .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .ppt, .pptx, and .pdf. Please do not include special characters (i.e., # : % \* / ( | ) > ? +) in your file names.

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, and 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.



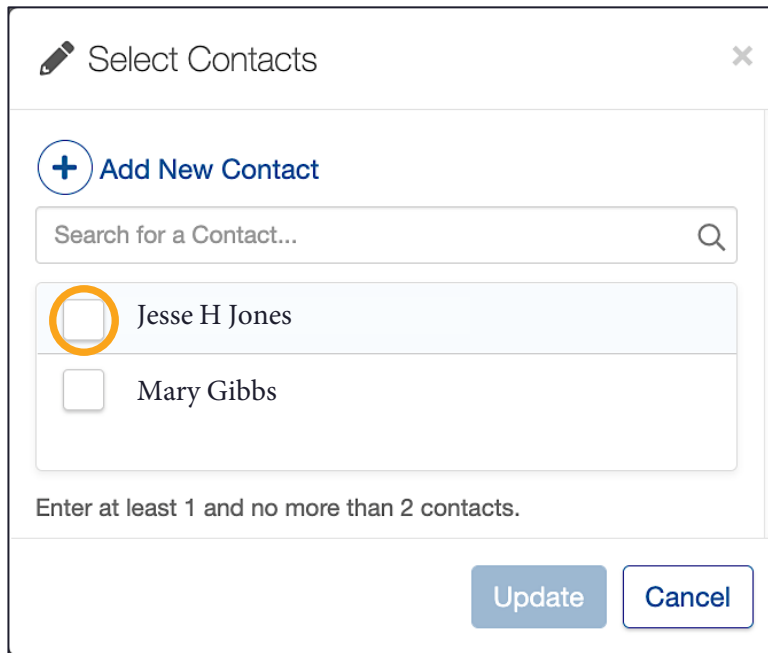


# FIELD TYPE: CONTACT SELECT

## Contact Select

This type of field includes a list of your organization's contacts that are already in the system. Click Select Contacts, then select the appropriate contact by checking the box next to their name. To add new contacts, click Add New Contact, complete the required fields, and click Update.

Select Contacts



Select Contacts

+ Add New Contact

Search for a Contact...

☒ Jesse H Jones

☐ Mary Gibbs

Enter at least 1 and no more than 2 contacts.

Update Cancel

Selected Contacts: 1 **1 Incomplete**

Jesse H Jones

⚠ Required: Title, Phone Number (Primary), Address (Primary)

@ Primary (Preferred):

Edit

Deselect

Once you select a contact and click Update, it will appear in a box labeled Selected Contacts.

- To remove a contact, click Deselect.
- To edit a contact, click Edit to complete the contact's information.

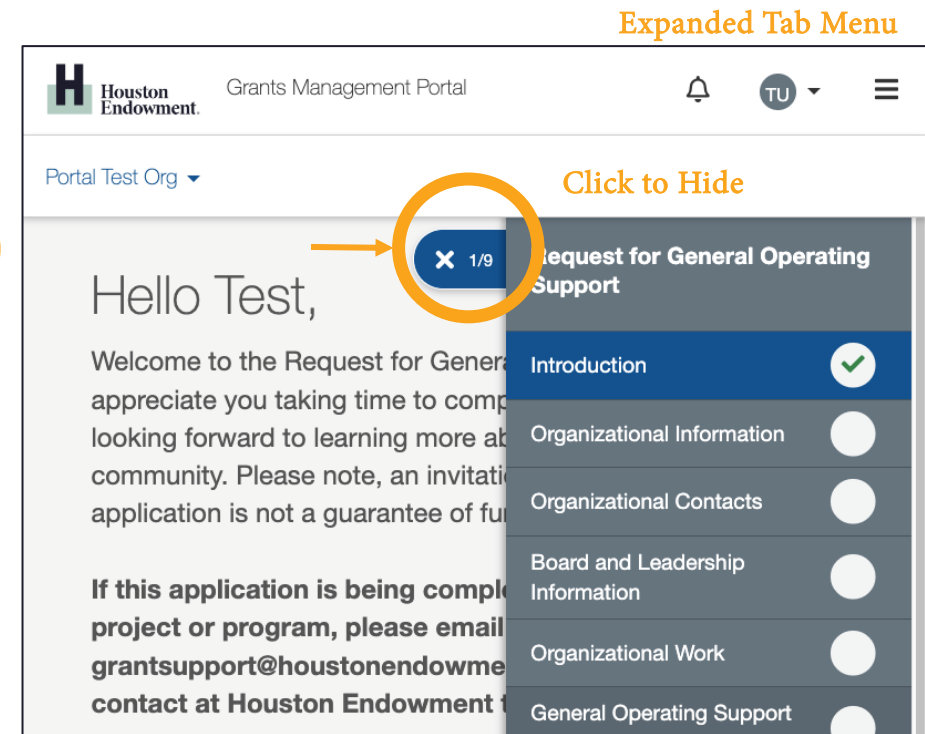
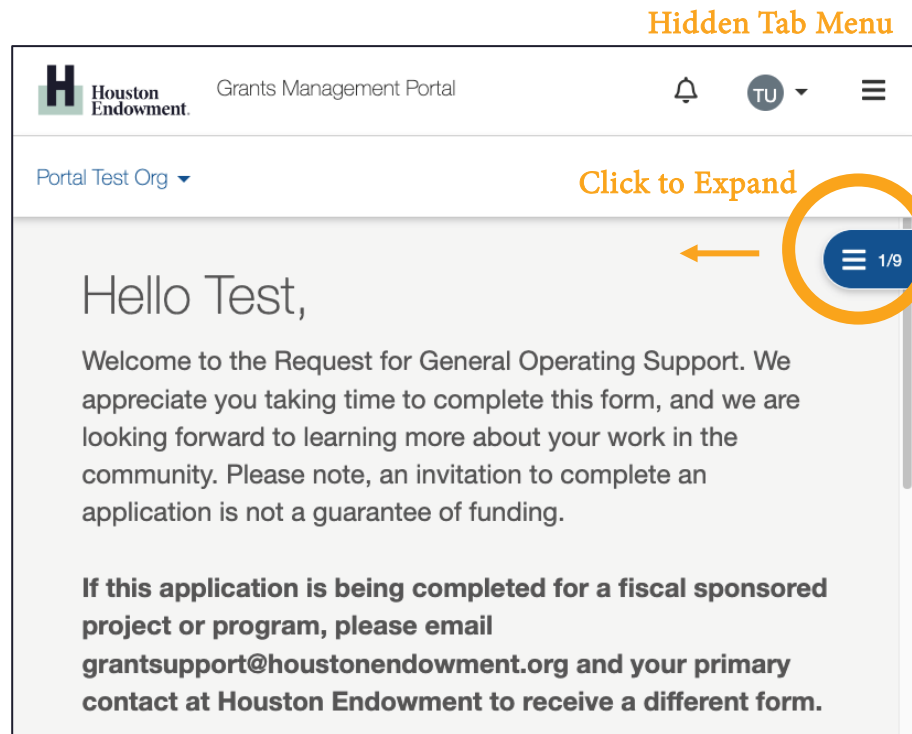
If one or more required fields is missing from a contact's record, you will see an error message like the one shown above indicating the contact record is incomplete. The red text indicates which required fields need to be filled out. The modal that appears when you click Edit is the same form that appears to Add New Contact. Enter information in the required fields. Once you have completed all required fields, click Save.





# MOBILE OR CONDENSED VIEW

If you are accessing the portal on a mobile device or a condensed view of a browser, the view you see may differ from many of the images below, but the functionality will remain the same. In a condensed or mobile view, the tab menu will be hidden, but you can expand or hide them with a few clicks.





# SUCCESSFUL SUBMISSION



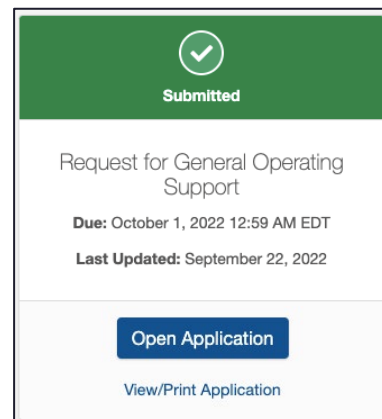
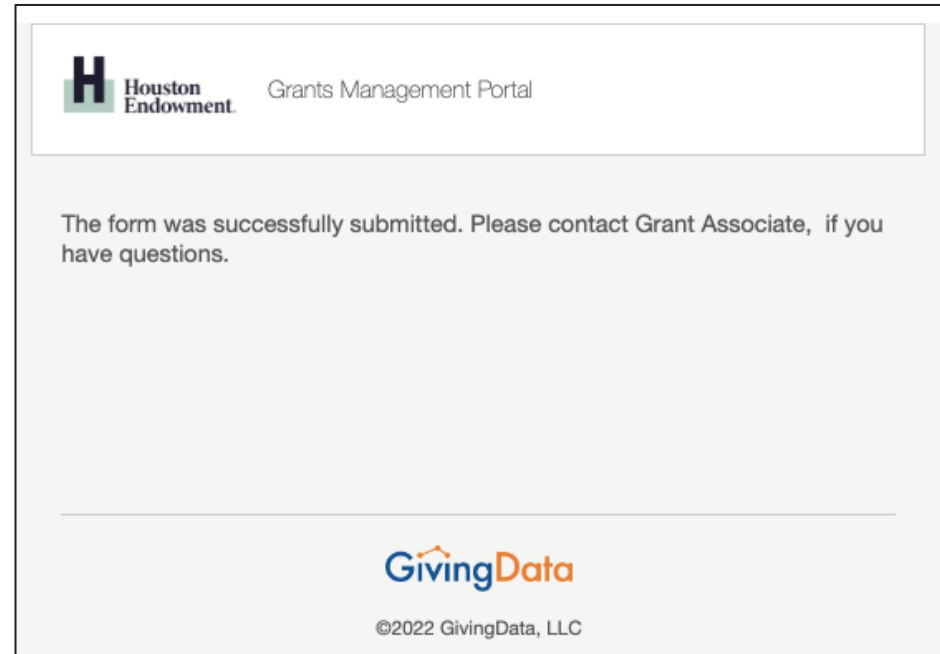
✓ The form has been successfully submitted.

[Return Home](#)

After you click Submit on application, a confirmation screen (above) will display.

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

You will also receive a confirmation email (right).



In the Applications section, you will see a tile for each application. The icon displays green to indicate that it has been submitted (left). From here you can View/Print Application or Open Application as read-only.

If you need to make any changes to the application, contact [grantsupport@houstonendowment.org](mailto:grantsupport@houstonendowment.org) or call (713) 238-8150.





## **FREQUENTLY ASKED QUESTIONS**







# FAQS

## 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.

## What kinds of documents can I attach in GivingData?

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. Files should not exceed 20 MB.

## 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 on our website. 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." In Chrome, you can also click Edit from the menu and then select "Paste and Match Formatting."

## Do I have to complete the entire 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](http://www.google.com/chrome) and follow the instructions.

If you have questions about the system, please refer to our website ([www.houstonendowment.org](http://www.houstonendowment.org)), email [grantsupport@houstonendowment.org](mailto: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](https://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](#)





Houston Endowment would like to thank [Philanthropy.io](https://philanthropy.io) for their support in creating this material.