GRANTEE GUIDE TO: Reporting in GivingData
# Table of Contents

- Account Activation & Signing In 2
- Portal Overview 8
- Reports Overview 19
- Frequently Asked Questions 29
You will receive an email from our new 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.) Note that Chrome and Safari are recommended.

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

Tip: GivingData works best in a Google Chrome web browser.

If you require assistance or additional log in credentials for other staff, contact grantsupport@houstonendowment.org or call (713) 238-8150.
You may receive an email inviting you to activate your grantee portal account.

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

If the button does not work, copy the URL listed in blue and paste it into a browser. (Do not copy the URL shown in this guide.)

**Tip:** GivingData works best in a Google Chrome web browser.
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 **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.
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.
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.
GRANTEE PORTAL OVERVIEW
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) and to return to this view.

**Dashboard**

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

**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.

**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.
### Legend of System Icons

<table>
<thead>
<tr>
<th>System &amp; Dashboard</th>
<th>Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Home Icon]</td>
<td>Home: clicking on this icon will take you to the home view.</td>
</tr>
<tr>
<td>![Notifications Icon]</td>
<td>Notifications: clicking on this icon will display a list of notifications (if any).</td>
</tr>
<tr>
<td>![Hamburger Menu Icon]</td>
<td>Hamburger Menu drawer: click it to expand and view the steps menu. Click again to hide.</td>
</tr>
<tr>
<td>![Active Applications Icon]</td>
<td>Active Applications</td>
</tr>
<tr>
<td>![Active Grants Icon]</td>
<td>Active Grants</td>
</tr>
<tr>
<td>![Closed Grants Icon]</td>
<td>Closed Grants</td>
</tr>
<tr>
<td>![Declined Applications Icon]</td>
<td>Declined Applications</td>
</tr>
<tr>
<td>![Progress Indicator Icon]</td>
<td>Progress Indicator: In a modal, this will indicate how many steps and which step you are on.</td>
</tr>
<tr>
<td>![Pencil Icon]</td>
<td>Pencil: click to edit a field.</td>
</tr>
</tbody>
</table>

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 of 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.
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.

Prepared by Philanthropy.io | June 2019
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), a 1 appears in both the Top Menu and on the icon on the Dashboard to indicate there is one (1) Active Grant.

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

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.
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 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 view 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.
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**: To 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.
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:*

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.
**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**

<table>
<thead>
<tr>
<th>Quote</th>
<th>Italic</th>
<th>Bulleted List</th>
<th>Insert/Edit Link</th>
<th>Undo</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>&quot;</code></td>
<td><code>B</code></td>
<td><code>I</code></td>
<td><code>U</code></td>
<td><code>ri</code></td>
</tr>
<tr>
<td><code>&quot;</code></td>
<td><code>B</code></td>
<td><code>I</code></td>
<td><code>U</code></td>
<td><code>ri</code></td>
</tr>
<tr>
<td><code>&quot;</code></td>
<td><code>B</code></td>
<td><code>I</code></td>
<td><code>U</code></td>
<td><code>ri</code></td>
</tr>
</tbody>
</table>

---

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

Words: 0  Characters: 0
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.
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
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.

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.
Accessing Reports

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

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**.

3. From the detail view, scroll to the Reports section.

   Identify the correct report and click **Open Report**.

   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 browsers. 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 step of six (1/6).
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.

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

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 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 Report.

Can Houston Endowment see my responses before I submit my report?
Technically, the system allows it but it is not the practice of Houston Endowment to access incomplete applications.

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. Advanced formatting (italics, bold, bullets, etc.) may not be preserved.

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 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 email grantsupport@houstonendowment.org or call (713) 238-8150.
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.