



MicroEdge

It's not just a job. It's a calling.

Foundation Center Export

eGrant Reporting Instructions

for GIFTS[®] Alta

eGrant Reporting Overview

This supplemental user information is applicable to all GIFTS Alta users. GIFTS Alta includes a **Foundation Center Export Report** for eGrant reporting in its standard reports library.

With this report, foundations can create an electronic file to export grants data from their reports library directly to the Foundation Center, ensuring they are communicating the most accurate and up to date grant information to the philanthropic community.

The eGrant report template and documentation are available for download in PowerME™, the MicroEdge client portal. You can access PowerME by visiting www.microedge.com and clicking on the PowerME Login button. If you do not know your username and password please contact the MicroEdge designated support contact at your organization.

Instructions to create an export file for the Foundation Center

Step 1: While in **GIFTS Alta**, go to the **Reports** tab

Step 2: Click the **Requests** record type (section) and then search or scroll down the list of standard reports and choose the **Foundation Center Export Report**

Step 3: Next, click on the **yellow arrow** to run the report and if necessary, click the **Set Search** link to specify the grants you wish to include in the export

Example:

- Click the **Set Search** link
- Click the **Filters** link
- From the list that appears select the **Approval Date** radio button and click **OK**
- Next, select the date range **Last Year**
- Click **OK**

Step 4: After setting the search, click **OK** to run the report. The report is generated and displayed using the standard reports viewer

Step 5: When the report has finished processing, click **Export Report** on the standard reports viewer toolbar, located at the top left of the report

Step 6: You will be prompted to choose a file format and destination for the export. Choose **Separated Values (CSV)** as the file format, and **'Disk file'** as the destination. Click **OK**

Step 7: You will be prompted to provide the file name and location where you wish to save the export file. Enter the file name and location, and click **Save**. The export file will save to the determined location

Step 8: The final step for eGrant reporting is for you to email the export file to the Foundation Center at: egrants@foundationcenter.org.

If you require Technical Support, please call (877) 704-3343 or e-mail helpdesk@microedge.com