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Foundation Center Export

eGrant Reporting Instructions

for GIFTS[®] Online

eGrant Reporting Overview

This supplemental user information is applicable to all GIFTS Online users. GIFTS Online 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 Online**, go to **Launch>Reports**

Step 2: Select the **Requests** record type (category)

Step 3: When the **Generate Report – Requests** window opens, choose the **Foundation Center Export Report** from the Report drop-down

Step 4: If necessary, specify the grants you wish to include in the export using the **Selection Criteria** section. You can click on **Modify** to add search criteria

Example:

- Click the **Modify** link
- Click the **More Filter Options** link at the bottom of the **Query Builder**
- Check the checkbox located next to **Approval Date** and click **OK**
- Next, select the date range **is Last Year**
- Click **Select**

Step 5: After specifying the search criteria, click **Generate Report**. The report is generated and displayed using the standard reports viewer

Step 6: When the report has finished processing, click **Export** on the standard reports viewer toolbar, located at the top left of the report

Step 7: You will be prompted to choose a file format and page range for the export. Choose **MS Excel 97-2000** as the file format, leave the page range set to **All**, and click **OK**

Step 8: You will be prompted to Open, Save or Save As. Click **Save As** and enter a file name and select the location where you wish to save the export file. Finally, click the **Save** button and the export file will save to the selected location

Step 9: 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