



MicroEdge

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# Foundation Center Export

*hGrant Reporting Instructions*

*for* GIFTS<sup>®</sup> Online

## hGrant Reporting Overview

The hGrant reporting tool allows GIFTS Online customers the ability to participate in the Foundation Center's Grantsfire project.

### What is hGrant?

hGrant was developed as part of the Grantsfire project to help foundations:

- Publish their grants information to the Web so it is easier for nonprofits to find grant information
- Access timely information about what projects and areas of focus are being funded in the nonprofit sector
- Create an online vehicle that will enable them to be more transparent about their grant making

Publishing using hGrant allows third-party software to read grants information and aggregate it on a central database.

Grant feeds published by any foundation using the Foundation Center's hGrant Reporting program are freely available to the public at [www.glasspockets.org](http://www.glasspockets.org), the Center's online portal that champions transparency in the philanthropic sector.

To find out more about the Foundation Center's Grantsfire project and consider joining go to:

<http://foundationcenter.org/grantmakers/hgrant.html> or contact [hgrant@foundationcenter.org](mailto:hgrant@foundationcenter.org) for more information.

## Enabling the hGrant Feature

Before starting, you must email a request to MicroEdge at [services@microedge.com](mailto:services@microedge.com) to enable the hGrant feature in GIFTS Online.

### Configuring Classification Codes

For compatibility with Foundation Center's hGrant format, your geographical code levels must be arranged in a specific way as shown below. If your levels are not currently set up this way they can be changed using the Admin > Classifications tool.

**NOTE: Country** is taken from the Organization Country on the Request.

Geographical Area Served		
Level	Description Name	Example
1	Intra Country Region	Northeast US, Northern Canada etc.
2	State or Province	New York
3	County	Kings County
4	City	Brooklyn
5	Neighborhood	Park Slope

## [hGrant Report Requirements](#)

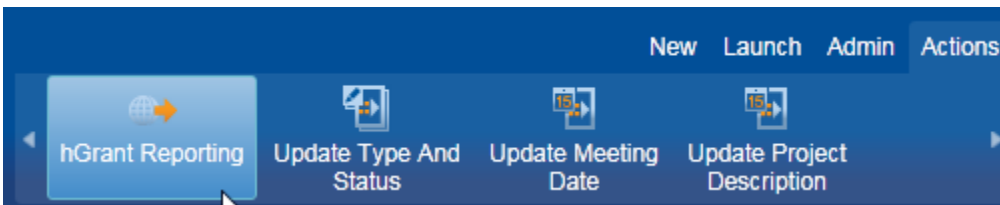
The following conditions are required to run the hGrant Report:

- The hGrant Report XML can only be generated for Approved grants.
- There are required fields specified by hGrant.
  - **City** and **State** in both the grantor organization and grantee organization
  - **Project Description** in the Request
  - **Grant Amount** in the Request

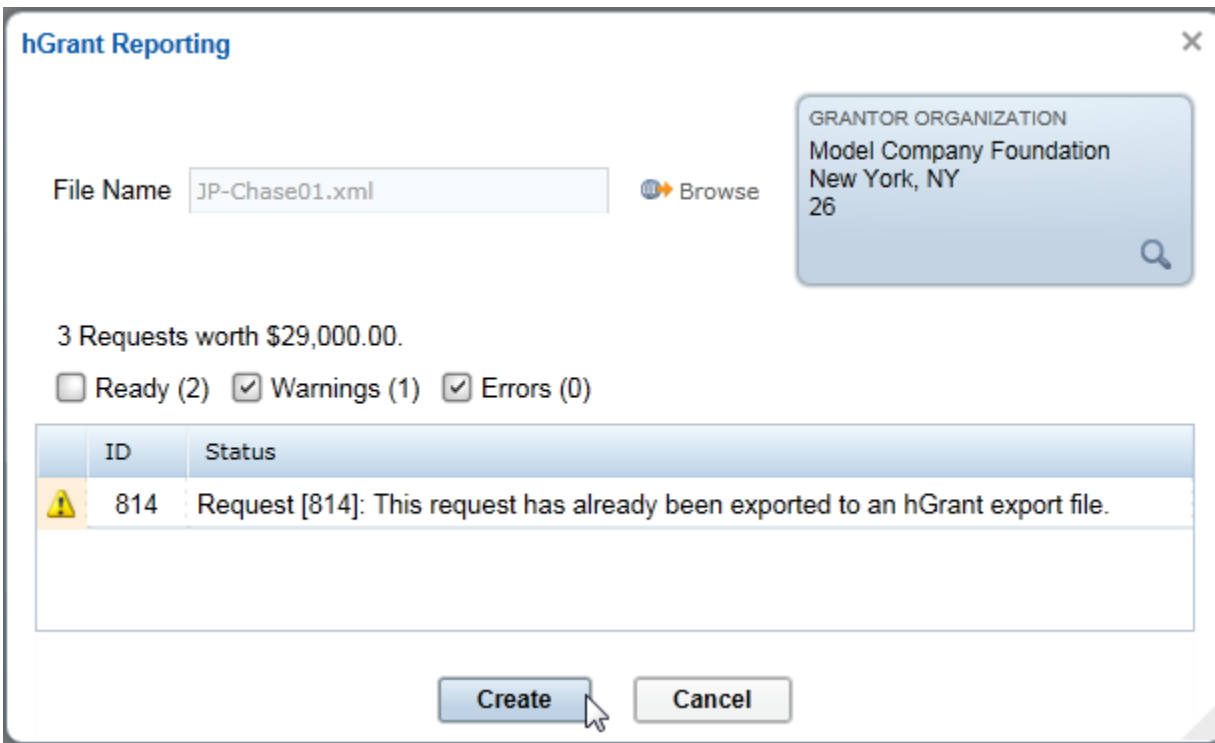
## [Running the hGrant Report](#)

**NOTE:** When hGrant is enabled, the menu option is only visible to Grant Managers and Administrators.

Once enable by MicroEdge, hGrant is accessible on Request search results pages and Related Requests lists via a new option on the Actions menu; hGrant Reporting.



When you select one or more Requests in the search results and then select **Actions > hGrant Reporting**, the following form opens:

A screenshot of the 'hGrant Reporting' form. The form has a title bar 'hGrant Reporting' with a close button. It contains a 'File Name' field with the value 'JP-Chase01.xml' and a 'Browse' button. To the right is a search box for the grantor organization, showing 'GRANTOR ORGANIZATION Model Company Foundation New York, NY 26'. Below this, it says '3 Requests worth \$29,000.00.' and has three checkboxes: 'Ready (2)', 'Warnings (1)', and 'Errors (0)'. A table below shows one row with a warning icon, ID '814', and the status 'Request [814]: This request has already been exported to an hGrant export file.' At the bottom are 'Create' and 'Cancel' buttons.

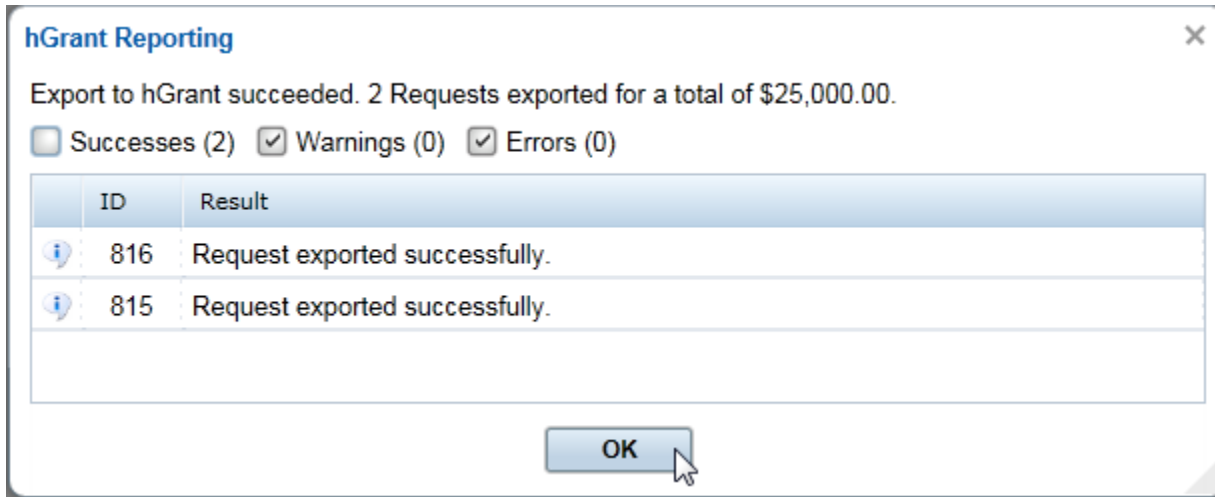
ID	Status
814	Request [814]: This request has already been exported to an hGrant export file.

Field Name	Description
File Name	<p><b>[Required]</b> This file will contain the hGrant data and will be uploaded to the hGrant site.</p> <p>Click the <b>Browse</b> button to open a Windows browse form in order to specify:</p> <ul style="list-style-type: none"> <li>• The location you wish to save the XML file</li> <li>• The name of the new XML file</li> </ul> <p><b>NOTE:</b> The location of the file must be on your local workstation or network. These files cannot be stored on the GIFTS Online servers.</p> <p>The system will create an XML file with the name and location indicated. If a file with the same name is found in that location, you are prompted to confirm overwrite or cancel.</p> <p>The generated XML file can then be uploaded to Foundation Center to make the information public.</p>
Grantor Organization Card	<p>A grantor organization must be defined for inclusion in the vCard* block of the XML file.</p> <p>For this reason, you should create an Organization record for your organization in your GIFTS Online database. If multiple entities are involved, multiple Organization records should be created so the options will be available when the hGrant Report is run.</p> <p>Clicking the magnifying glass lookup icon will open an hGrant Organization search form allowing you to find other organizations in your database to assign as the Grantor.</p> <p><b>NOTE:</b> *vCard is a file format standard for electronic business cards. vCards are often attached to e-mail messages, but can be exchanged in other ways, such as over the Internet or instant messaging. They can contain name and address information, phone numbers, e-mail addresses, URLs, logos, photographs, and audio clips.</p>
Number of Requests and Total Amount	<p>Below the File Name the number of Requests selected and the total grants amount will display.</p>
Process Monitor	<p>The process monitor area serves to list any 'pre-processing' warnings or errors. After creating the XML file, this area will list all successful exports with the Request ID and the status of Exported.</p>
Create	<p>Click this button to create the XML file containing the selected Request data.</p> <p>This button will be disabled if:</p> <ul style="list-style-type: none"> <li>• No File Name is entered</li> <li>• The Grantor Organization is not set</li> <li>• The Process Monitor shows errors that must be addressed</li> </ul>
Cancel	<p>Closes the hGrant Reporting form without creating the XML file.</p>

## Successful XML Creation

Once a File Name is entered and a Grantor Organization is set, if there are no errors listed, you can click **Create** to generate the XML hGrant file.

The Process Monitor will look similar to the sample below:



## Activity History

For every hGrant Reporting export, one activity record will be created.

Note that Organization, Contact, Request, and Payment will be blank because this activity record represents the entire batch.

If a particular request is re-exported, the Export\_ID will be replaced with the new Activity.ID. For that request, the Export\_ID will only reference the latest export. Reference to the old Activity.ID is lost.

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