

Importing via the eGrant.net Web Service

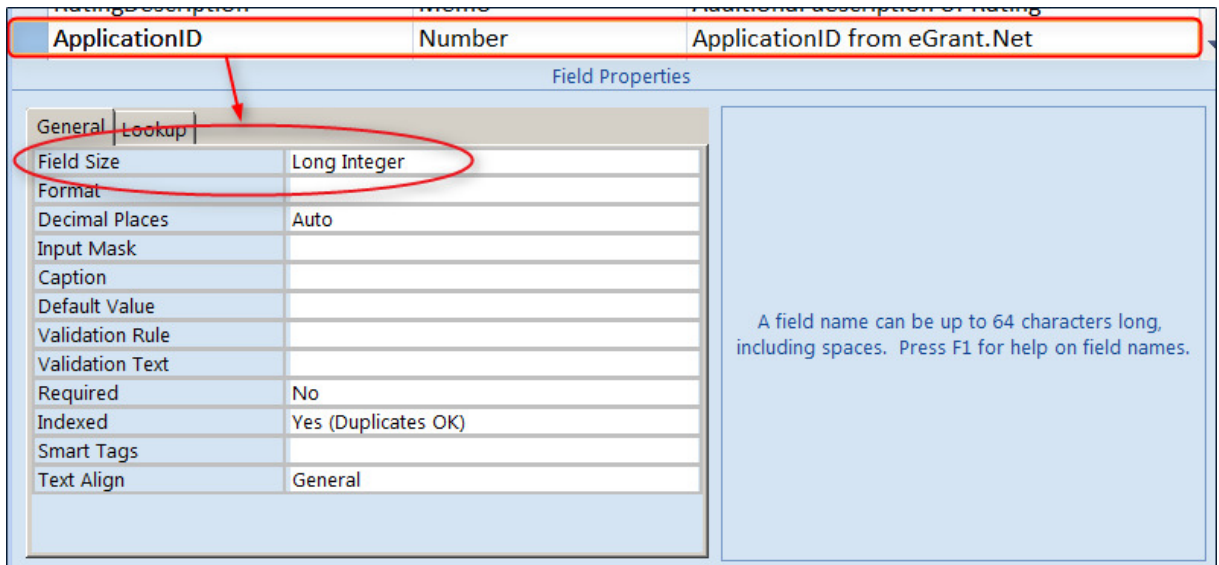
Follow these steps to import data into Pearl via the eGrant.net web service. Using the web service is the most direct way of importing eGrant.net applications directly into Pearl without having to manage data files (XML, CSV, or MDB). Pearl imports the application data directly from eGrant.net via the internet.

Setup

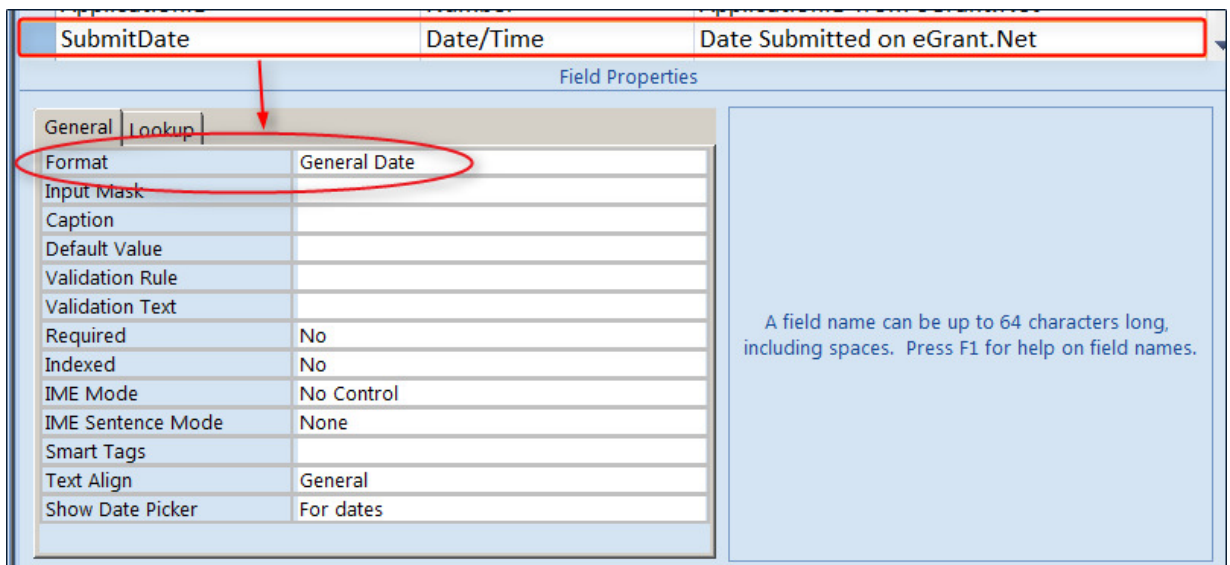
- 1) You must have two fields in order to import via the web service: ***ApplicationID*** and ***SubmitDate***. If you do not have these two fields, you must add them to REQUESTS, qryREQUESTS, and the Grants Management System. Contact Bromelkamp support if you need assistance adding these fields.

Note: Clients who have previously used Pearl's import process for eGrant.net records may need custom queries or modifications to import some records with the web service (e.g. if the Application was imported the old way and the Final Report is being imported via the web service). You may need to pre-fill SubmitDate with a date after the last phase was received. Please contact Bromelkamp Company for assistance.

2) **ApplicationID** Field Size must be Long Integer:



SubmitDate Format must be General Date:



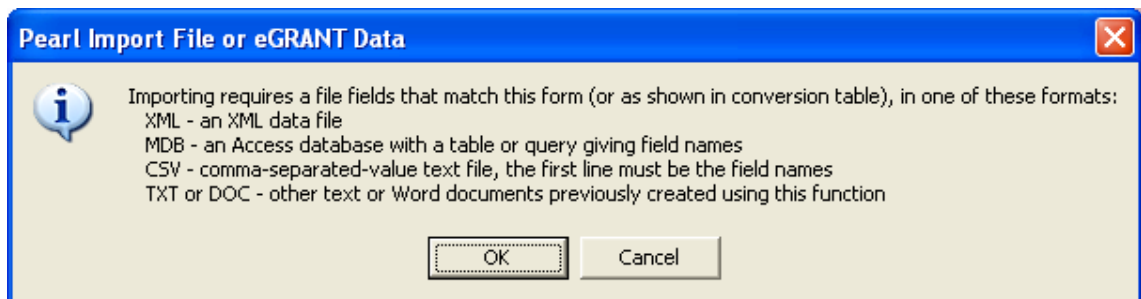
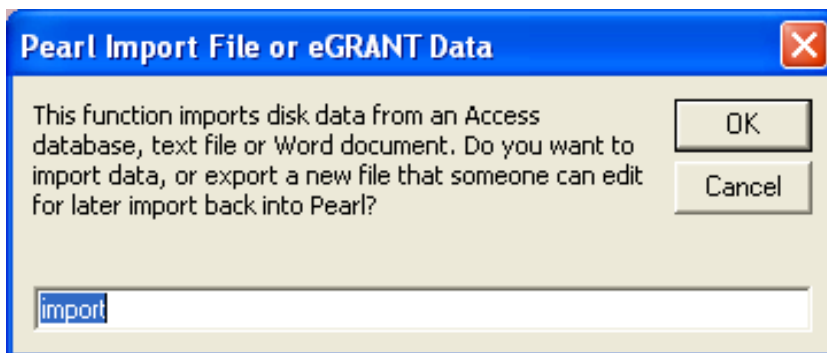
3) If your Grants Management System form includes a "Status" field, you must add the following to the import aliases qryREQUESTS table. This prevents the eGrant Status (Submitted, Working, etc.) from being imported into the Status field in Pearl.

import aliases qryREQUESTS	
ImportField	PearlField
Status	DoesNotExist

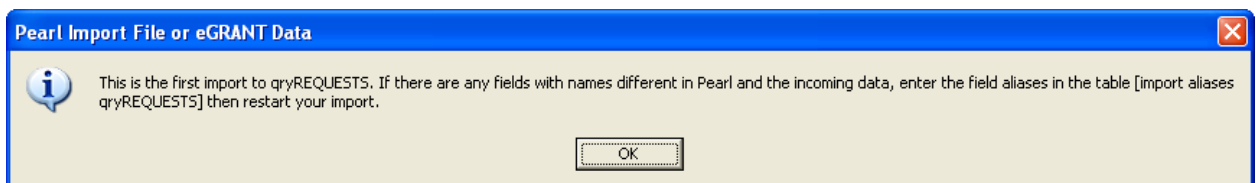
Operation

To run the import via the eGrant.net web service, do the following:

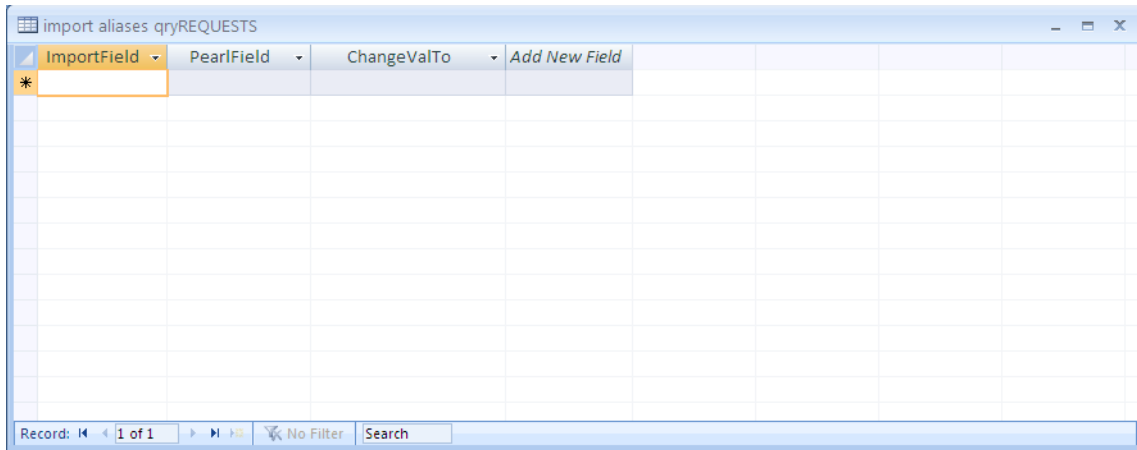
1. Open the Grants Management System form.
2. In Access 2007/2010 click the Add-Ins tab on the ribbon. *(If you have Access 2003, continue to step 3.)*
3. From the File menu choose "Import File or eGrant Data," or hit Shift+F11 on your keyboard.
4. The following two messages are displayed the first time you start an import session. Click OK to both messages:



5. If this is the first time you've imported into the Grants Management System, Pearl will add a translation table. The following message is displayed:

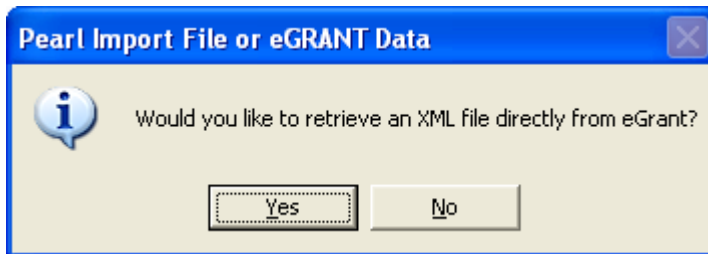


- Click OK and Pearl will display the translation table. Enter any field name/value translations that are necessary for your import and close the table Pearl builds. The table looks similar to this table:

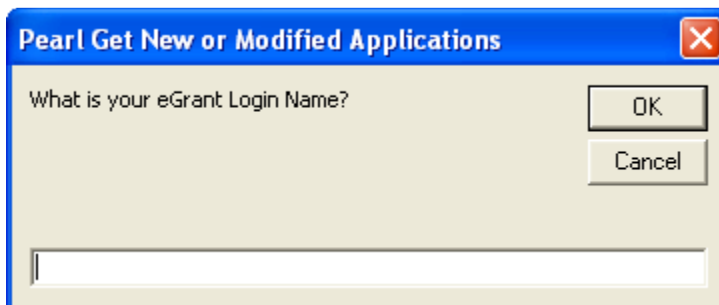


The screenshot shows a window titled "import aliases qryREQUESTS". It contains a table with four columns: "ImportField", "PearlField", "ChangeValTo", and "Add New Field". The first row of the table has an asterisk (*) in the "ImportField" column. Below the table, there is a status bar with "Record: 1 of 1", "No Filter", and a "Search" field.

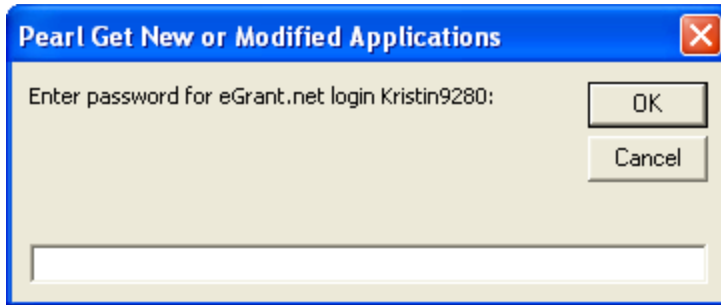
- Close the import aliases qryREQUESTS table.
- After closing the table you will be back at the Grants Management System form. Hit Shift+F11 (or File -->Import File or eGrant Data) again to restart your import.
- Pearl will ask if you'd like to import directly from the eGrant.net web service. Click "Yes."



- If this is the first time you are doing an import, you will be prompted for your eGrant.net Login Name.



11. Every time you start an import session, you will be prompted for your eGrant.net password.



12. Pearl will check eGrant.net for any applications that are newly submitted or any applications that have been resubmitted and display a list for you:

The screenshot shows the 'Pearl eGrant Import' application window. At the top, there are several filter fields: 'Grant Type:', 'Document Type:', 'Applicant Name:', 'Fiscal Year:', 'Submitted Between:' (with 'and' in between), and 'Sort by:'. Below these filters, it says 'Number of Applications Shown: 5'. A table displays the following data:

ApplicationID	GrantTypeName	DocumentTypeName	OrganizationName	UserName	SubmitDate	LastModified
85044	Sunspot Grants	Full Application	Torn Hearts Assistance, Inc.	Tara Smith	1/26/2010 6:37:29 PM	5/25/2010 3:40:5
85281	Sunspot Grants	Final Report	Bromelkamp Company	Andrew Olson	5/17/2010 6:21:38 PM	5/17/2010 6:20:2
107499	Sunspot Grants	Full Application	The Burton D. Morgan Foundation	Marie Erb	6/11/2010 5:31:36 PM	6/11/2010 5:29:3
107981	Sunspot Grants	Full Application	USADF	David Blaine	5/18/2010 2:00:34 PM	5/18/2010 1:30:2
109015	Sunspot Grants	Full Application	The Burton D. Morgan Foundation	Marie Erb	6/14/2010 3:43:51 PM	6/14/2010 3:42:1

13. You can optionally filter the list of applications by the following:

Grant Type If you use multiple grant types in eGrant.net, choose a specific grant type to view only records that have been submitted within that grant type.

Phase/Document Type If you use multiple phases within a grant type in eGrant.net, choose a specific phase/document type to view only records that have been submitted within that phase/document type.

Applicant Name Choose a specific applicant name to only view records submitted by a single applicant.

Fiscal Year Choose a fiscal year from which records have been submitted to view only records submitted within that fiscal year.

Submitted Dates Enter a date range to view only records that have been submitted between the two dates.

Sort by Choose one of the categories above by which to sort the list of records.

14. To import a specific record, double-click the record on the list. This will populate the fields on the form with the data from the eGrant.net record.

15. Complete the import by following the steps in the section “Add or update records” in Pearl’s help topic called “Importing from text, Access or XML files.”

16. If the import appears to stall after you double-click on an application, you may need to uninstall Internet Explorer Enhanced Security. Here are the steps.

When it comes to disabling ES, you have two options – disabling it for all users on the server, or only users in the Administrators group.

1) Open up the Control Panel by going to Start, Settings, Control Panel. Double click on Add or Remove Programs.

2) Click on Add/Remove Windows Components.

3) To disable for Administrators: Scroll through the list of Windows Components and double click on “Internet Explorer Enhanced Security Configuration” and proceed to step 4. To disable for all users: simply check the checkbox and skip step 4.

4) Check or Uncheck the items you wish. In this example, we’ll uncheck the “For administrator groups” checkbox, leaving “For all other user groups” checked. Click OK.

5) Back in the Windows Component Wizard, click Next and then Finish when the operation completes. Restart Internet Explorer.

Read more: <http://www.brighthub.com/internet/security-privacy/articles/64685.aspx#ixzz1FZyXN0En>