Welcome to GrantForward!

Researchers can benefit from our complete award-seeking cycle including a comprehensive database of funding opportunities across all disciplines, a worldwide sponsor directory, and additional sources of pre-solicitations and funded awards. You can also take advantage of many advanced utilities such as getting funding alerts, receiving grant recommendations based on your research interests and matching grants delivered from administrators, etc.

In this Researcher Guide, you will learn:

- Creating Your Account
- Trying a Grant Search
- Managing Search Results
- Managing Grants
- Checking Out Pre-solicitations, Awards, and Sponsors
- Creating Your Researcher Profile
- Receiving Grant Recommendations
- Exploring Your Personalized Homepage
In order to use search functionality and basic features on GrantForward, you must create your account first. To make your account, just follow these steps:

1. Click on **Sign Up** on the upper right side of the GrantForward homepage.

2. On the **Create an Account** page, enter your institution’s email and necessary information for your account.

3. Check your inbox (and the spam folder too!) for a confirmation email. Confirm by clicking on the link in the email. Then, you can log in to use GrantForward—click on **Log In** on the upper right side of the screen.

For more guidance, you can view a step by step demo---

**QuickTip: Creating an Account**
Trying a Grant Search

Next, you can try out how to search on GrantForward by keywords/phrases and advanced filters to find funding opportunities that match your research topics. Under the Grants tab, choose Search Grant Opportunities.

Executing a Search

1. In the All of the Keywords/Phrases box, enter any words or phrases related to your fields of research (use quotes to match the whole phrase, space, or comma to separate the terms). Press Enter or click on the Search button to execute the search.

2. You will see the results quickly pop up for you to sift through. The results, by default, are sorted by Relevance to your keywords.

3. You can click on Advanced Keyword Search to switch keyword mode then enter keywords/phrases in the input fields of All, Any, or None of the Keywords/Phrases with matching requirements accordingly.

For more guidance, you can view a step by step demo---QuickTip: Trying a Keyword Search
Viewing Search Results

After running a search, you can view and sift through the results.

1. At the top of the results, you can see the summary of the search conditions. You can sort the results by Relevance, Deadline, or other properties. You can navigate to the Next or Previous page of results.

2. Each result will list the title, sponsors, deadline, description excerpt of a grant, etc. The matching keywords are highlighted so that you can quickly determine if the grant matches well what you are looking for.

3. Click on the title of a grant to go to the grant detail page with more information and links to the opportunity and application pages.
Adding Search Filters

To further narrow down your search results beyond topical relevance (by keywords/phrases), you can add more search filters -- including **Sponsors**, **Deadline**, **Amount**, **Sponsor Types**, **Grant Types**, **Applicant Types**, etc.

1. On the **Search Grant Opportunities** page, you will see all filters listed on the left side.

2. Set the filters to add additional criteria for matching your desired grants. E.g., you can set **Deadline** to focus on a certain period and **Grant Types** to include specific types that apply to you.
   - To learn more information about each filter, move your mouse cursor over the icon 🔄.
   - After adding any filters, the current search conditions will be summarized and displayed above the search results. You can remove a condition by clicking on its “x” in the search summary.
   - The search results will automatically be updated with added filters.

For more guidance, you can view a step by step demo---
**QuickTip: Searching with Advanced Search Filters**
Managing Search Results

For future reference, sharing, or keeping track of your search results, you can export and share search results or save a search to get grant alerts.

Exporting Search Results

1. To export a list of search results, after setting your search up by keywords/phrases and other filters, click on the Export button above the search results.

   ![Export button in search results](image)

2. In the dialog box, you can select the file format, the number of results, and the fields to export. Then, click Export to download the file.

   ![Export dialog box](image)
Sharing a Search

1. Share your search under URL format with your friends/colleagues by clicking on the URL button above the search results.

2. You can send the shareable URL directly to your friends/colleagues or send it with additional messages via emails, and the recipients will be able to view your search with full conditions.

For more guidance, you can view a step by step demo—
QuickTip: Sharing a Search/Grant
Saving/Loading a Search

After setting up a search, instead of recreating the same search every time you want to see new grant opportunities within the selected search criteria, you can set up a saved search with email alerts to automatically get notifications. Saved searches now can also be loaded directly on the search page, or assigned as a default condition.

1. To save your search, after setting your search up by keywords/phrases and other filters, click on the Save/Load button above the search results, then choose Save a Search.

- In the pop-up dialog box, you can choose to update a previously saved search or create a new one. Then set the frequency (daily, weekly, or monthly) for receiving alerts whenever there are new grants updated to the list.
- To view or edit your saved searches, you can find them at the Saved Searches page under the Grants tab.
Saved searches now can also be loaded directly on the search page. To load a search, click on the **Save/Load** button, then select **Load a Search**.

- In the pop-up dialog box, you can choose an existing saved search, then the previous search results with full search conditions will be loaded. You can also make this search your default search condition so that it will be displayed whenever you visit the Grant Search page.

For more guidance, you can view a step by step demo-- **QuickTip: Saving Your Search**
Managing Grants

We support many advanced features to help users get better grant management. You can build your lists including the best fit grants and then keep track of them.

Exporting a Grant

1. You can export an individual grant by clicking on the title of the desired grant to view the grant detail page.

2. Click on the Export button under the grant title.

3. In the pop-up dialog box, you can choose the file format and the fields to export. Then, click on Export to download the grant.
Adding a Grant to Favorites

1. There are two ways allowing you to mark a grant as your favorite to view it later quickly without having to set up the search and find it again.

   • You can click on the ★ button displayed on the right side of the grant title when this grant is shown in the search results.

   ![Click on the star button to add this grant to Favorites.]

   • You can view a grant detail page and then click on the Favorite button to mark it as your favorite.

   ![Give Together Grant Programs: Towbes Fund for the Performing Arts]

2. You will be able to view all favorite grants at the Grant Lists page under the Grants tab and export that favorite list.

   ![Grant List Management]
Building a Grant List

1. You are able to build a list from individual grants in a specific research topic in two ways:

   - Click on the button displayed on the right side of the grant title when it is shown in the search results.

   ![Image of a button to add a grant to a list]

   - Or when viewing a grant detail page, you can click on the Add to List button.

   ![Image of a grant detail page with an Add to List button highlighted]

2. In the dialog box, you can choose the name and color for the list that will contain your desired grants.

   ![Image of a dialog box for adding a new grant list]

   - List Name: Big Data
   - Tag Color: [Color selection]

   ![Add button with options to add or cancel]

   Click Add to confirm the settings.
You can also add a grant to available lists that you build before when the grant list is shown. One grant can belong to several lists and the list tags will be displayed along with that grant for easier recognition. A tag can be easily removed from a grant when you click on its “x”.

3 Click on **Manage Grant Lists**... to perform some actions such as changing list color or list name, removing a list, or adding a new list.

4 You will be able to view all your grant lists at the **Grant Lists** page under the **Grants** tab and export those lists.
Sharing a Grant

1. You can share an individual grant with your friends/colleagues via emails by visiting a grant detail page and clicking on the Share button.

2. In the dialog box, enter the email address of the recipients that you intend to send to. The content can be customized on your own to have additional messages along with the grant.

3. You can view all the grants that you have shared on the Shared page under the Grants tab.
Excluding a Grant

1. When there are some grants from the search results which do not suit your research needs well, you will have the ability to exclude them from the search. To no longer see a grant, you can move your mouse cursor to a grant area to show the exclusion function.

2. Click on the **Exclude from Your Search** button and choose a reason for the exclusion. We’re always willing to hear users’ feedback to improve our service quality better.

3. You can view all excluded grants at the **History** page under the **Grants** tab and revoke exclusion at any time. All grants that you have viewed are also displayed there.
Checking Out Pre-solicitations, Awards, and Sponsors

Not only grants but we also provide a comprehensive database of sponsors, pre-solicitations, and awards to create a complete award-seeking cycle to help you get insights into the grant cycle, so you will never miss any grants.

- The Pre-solicitations page offers a database of the notices from sponsors which provide a heads-up that solicitation will be released and solicit capability responses from responsible vendors so that you will have sufficient time to prepare better for submitting applications later. You can find to-be-announced grants by keywords/phrases and add available filters such as amount or estimated grant call date, etc.
- On the Awards page, you can find who/what institutions were winning grants and what research topics have been funded by using keywords/phrases and various filters such as status or award type, etc.
- The Sponsor Directory will show you over 18,000 sponsors worldwide on our system which can be searched by name or sponsor type. You can click on any sponsors to see detailed information and their grants on GrantForward.
Creating Your Researcher Profile

With a researcher profile, you will have a “homepage” that nicely displays your experience and publications, and you can start receiving automatic grant recommendations that are tailored to your research interests.

1. Under the **Researchers** tab, click on **Create Profiles**.
2. Select the **Begin Building** button under **Build Your Profile**.

3. **The first page** asks about your **Basic Information**.

![Build your researcher profile](image)

4. **The second page** asks about your **Research Interests**-- which you can indicate by specifying an **Interest Source**, i.e., where to find your publications. You can select one of the three ways from the dropdown.

- If you have an existing research or publication webpage, enter the URL into the **Publication Page** box.

![Specify a publication webpage](image)
• You can also upload your CV PDF (which contains publications).

• Or, you can manually copy and paste your publication citation text.

In addition to specifying your publications, you can also add Other Interests that are not reflected by your publications. Just click on the Add more interests... button, and then enter the keyword and move the scrollbar to indicate its importance.

The third page asks about Extra Info & Profile Options. You can enrich your profile with more information about your education, biography, contact, your photo, and links to your homepages.
Lastly, you can adjust your **Profile Options**— including profile viewability, what you wish to display on your profile, and— most importantly— the frequency (daily, weekly, monthly) of receiving recommendation emails.

![Profile Options](image)

Now your GrantForward Researcher Profile is complete! The system will take a few minutes to complete building your profile.

![Profile submission completed successfully!](image)

When the processing is completed, you can view it by clicking on the **Researchers** tab and choosing **My Profile**. If you wish to edit your profile, you can choose **Edit My Profile**.

**GrantForward Quick Tip**

For more guidance, you can view a step by step demo—**QuickTip: Creating Your Profile**
Getting to Know Your Profile

Now that you have a Researcher Profile, you can explore your profile. To start using your profile:

1. Go to the **My Profile** page under the **Researchers** tab. Here you can view your profile and get to know its various components.

2. Take a look at your **Research Interests** Cloud and Timeline. You can embed it on any website of your choosing by clicking on the **Embed** button above it to get the HTML code.

3. You can use your researcher profile as your research homepage that integrates all your essential information and research. Look at the browser address bar for the URL to share:
Receiving Grant Recommendations

With a Researcher Profile created, you can receive grant recommendations based on your research interests, on GrantForward, or via emails. To view your recommended grants and set up email notifications:

1. Go to the **Recommendations** page under the **Grants** tab, which lists the recommended grants for you based on your research interests keywords.

2. You can add filters to further tailor the recommendations: e.g., if you are a researcher, you may want to exclude some student-oriented grants.

3. You can set the frequency of grant recommendation emails (upper right).

4. You will receive emails with recommendations, where each grant will have your interest keywords highlighted.

For more guidance, you can view detailed instructions--**CaseStudy: How Can I Tailor My Grant Recommendations?**
Exploring Your Personalized Homepage

GrantForward provides a personalized homepage to help you quickly see institution updates, personal updates, user groups as well as view GrantForward database updates and connect with potential researchers.

1. The Personalized Dashboard will keep your information up to date.

- **Institution Updates** tab shows notifications of what administrators performed such as changing your unit or permission, adding you to a group, or sharing a search template, a curated grant list, or a newsletter with you. You can also view those lists in this tab.

- **Personal Updates** tab displays the latest grant recommendations matching your research interests, updates from your favorite grant list, and new grants added to your saved searches.
• **Users Groups** tab shows all groups that you joined or were added by other administrators. You can also proactively join other groups you are interested in or leave any current groups.

![Image of Users Groups tab]

GrantForward Database Updates allows you to view new sponsors, grant opportunities as well as the distribution of grants from different sponsor types, and the number of newly added sponsors and grants.

![Image of New Sponsors and Grant Opportunities]

GrantForward displays researchers within your institution and across all institutions so that you can find potential researchers for collaborations. You can also check the status of your profile-creating process and take a survey to give feedback on how we can improve our service.