Welcome to GrantForward!

We will help you through the basics of using GrantForward by going over making accounts, searching for funding opportunities, creating researcher profiles, and receiving grant recommendations. Once you learn the basics of GrantForward, you’ll be moving your research forward in no time.

In this Researcher Guide, you will learn:

- Creating an Account
- Trying a Keyword Search
- Viewing Search Results
- Adding Search Filters
- Exporting/Favoriting/Adding Tag Grants
- Saving/Loading Search
- Creating Your Researcher Profile
- Getting to Know Your Profile
- Receiving Grant Recommendations
Creating an Account

In order to use all of the 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 email and a password for your account.

![Create an Account on GrantForward](image)

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 Keyword Search

Next, you will try out how to search on GrantForward by keywords to find grant opportunities that match your research topics. Simply follow these steps:

1. Under the Grants tab, choose Search Grant Opportunities.

2. In the All of the Keywords/Phrases box, enter any words or phrases (“in quotes”) related to your fields of research. Press enter, or click on the Search button to execute the search.

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

4. You can switch to the Advanced Search mode by clicking on Advanced Keyword Search, then enter keywords/phrases in the input fields of All, Any, or None of the Keywords/Phrases, which will require them to match accordingly.

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

QuickTip: Trying a Keyword Search
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 amount, deadlines, title, sponsors, excerpt of its description, etc. The matching keywords are highlighted so 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. From here, you can also visit the **Opportunity Source** where the grant was found.
Adding Search Filters

To further narrow down your search results beyond topical relevance (by keywords), 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 filters 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 certain types that are applicable to you.
   - To learn more information about each filter, move your mouse cursor over the icon 🔄.
   - As you add 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.
   - As you add filters, the search results will automatically be updated.

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

**QuickTip: Searching with Advanced Search Filters**
Exporting/Favoriting/Add Tag Grants

For future reference, sharing, or keeping track of your selected grants, you can export, favorite, or add tags to them.

1. To **export an individual grant**, click on the **Export** button in the grant detail page.

   ![Export button in grant detail page]

   - To **export a list of search results**, after setting your search up by keywords/phrases and other filters, click the **Export** button at the top of your search results page. In the dialog box, select the file format, the number of results, and the fields to export. Then, click **Export** to download the file.

   ![Export dialog box]

   - **Choose a Format**: Select the desired file format (e.g., CSV, PDF, or Excel).
   - **Number of Results to Export**: Choose the number of search results to export (e.g., 10, 25, 50, 100, or customize).
   - **Fields to Export**: Select the specific fields to include in the export (e.g., Title, Description, Status, Sponsor, Amount, Sponsor Type).
2 You can **favorite a grant** for quick access by clicking on the ✪️ button. You can view all favorited grants at the **Favorites/Tags** page under the **Grants** tab.

3 You can add tags to a grant for better reviewing/classifying them later. To **add tags to a grant**, click on the ✪️ button. You can view all tagged grants at the **Favorites/Tags** page under the **Grants** tab.

- In the dialog box, you can choose the available grant tags or add a new one. You can add a tag label and tag color for a new grant tag.

For more guidance, you can view a step by step demo—**QuickTip: Exporting Grants**
Saving/Loading 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 default condition.

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

- In the pop-up dialog box, check if you want to either update a previously saved search, or create a new one. Then set the frequency (daily, weekly, or monthly) for receiving alerts of new matching grants.
- To view or edit your saved searches, you can find them at **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 Search** button, then choose **Load a Search**.

- In the pop-up dialog box, choose an existing saved search, then the previous search results with full criteria will be displayed, and you can also make this search as your default condition on GrantForward.

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

**QuickTip: Saving Your Search**
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 a Researcher Profile.

3. The first page asks about your Basic Information.

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.
- 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 keywords 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 privacy setting, what you wish to display on your profile, and-- most importantly-- the frequency (daily, weekly, monthly) of receiving recommendations 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 choose **My Profile**. If you wish to edit your profile, you can choose **Edit My Profile**.

For more guidance, you can view a step by step demo--**CaseStudy: How Can I Create a Good Researcher 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 grants recommended to 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 (upper right) of grant recommendation emails.

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?**