



## Researcher Welcome Guide

### 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.

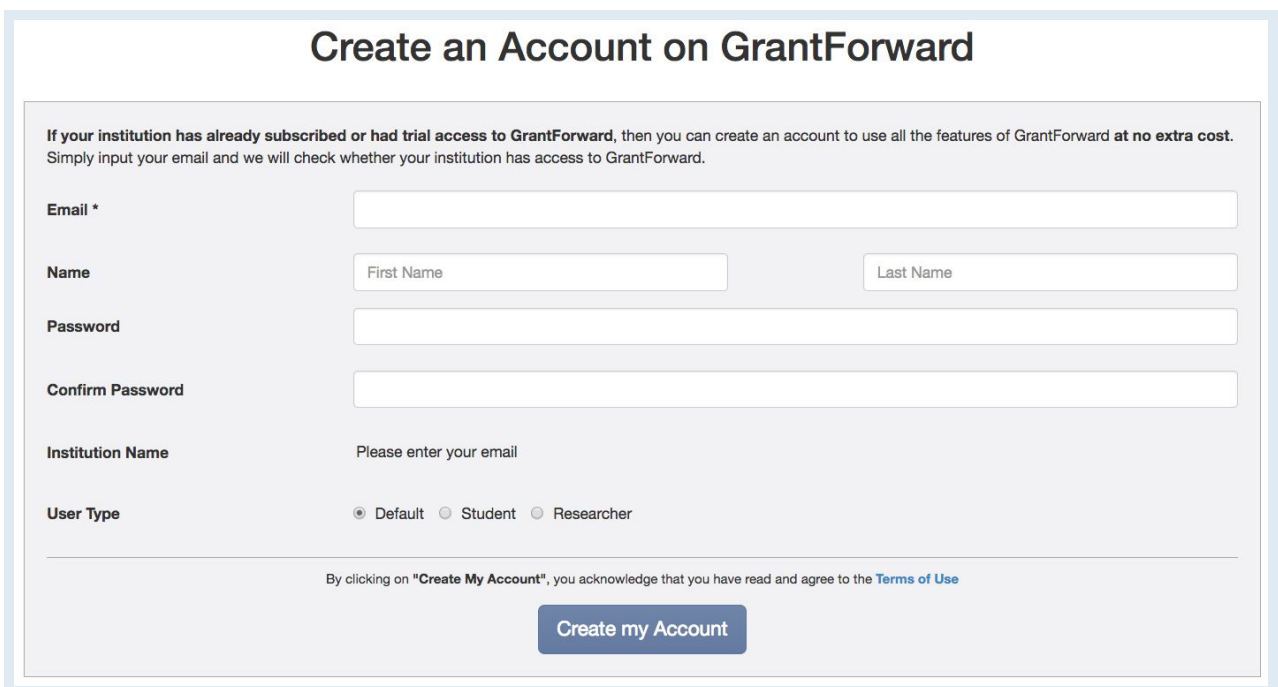
### In this Researcher Guide, you will learn:

- ▶ **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.



The screenshot shows a web form titled "Create an Account on GrantForward". At the top, it states: "If your institution has already subscribed or had trial access to GrantForward, then you can create an account to use all the features of GrantForward at no extra cost. Simply input your email and we will check whether your institution has access to GrantForward." The form includes the following fields and options:

- Email \***: A single text input field.
- Name**: Two text input fields labeled "First Name" and "Last Name".
- Password**: A single text input field.
- Confirm Password**: A single text input field.
- Institution Name**: A text input field with the placeholder text "Please enter your email".
- User Type**: Three radio button options: "Default" (selected), "Student", and "Researcher".

Below the form, there is a line of text: "By clicking on 'Create My Account', you acknowledge that you have read and agree to the [Terms of Use](#)". At the bottom center of the form is a blue button labeled "Create my 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.

GrantForward **QuickTip**  
For Researchers

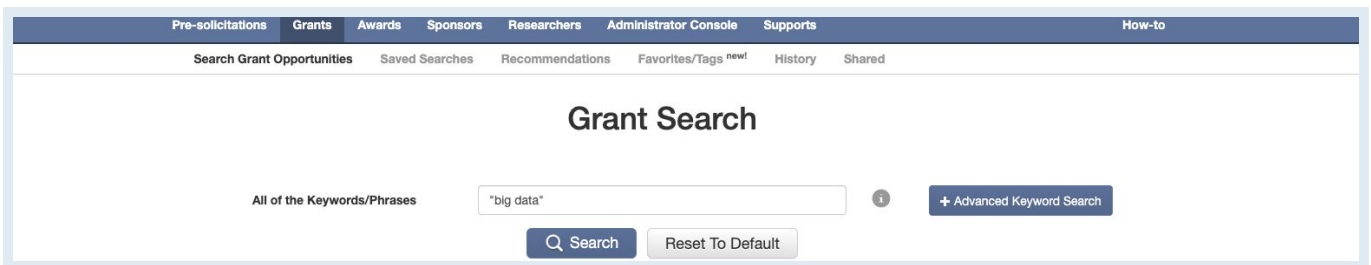
Creating an Account →

For more guidance, you can view a step by step demo--  
**QuickTip: Creating an Account**

# Trying a Keyword Search

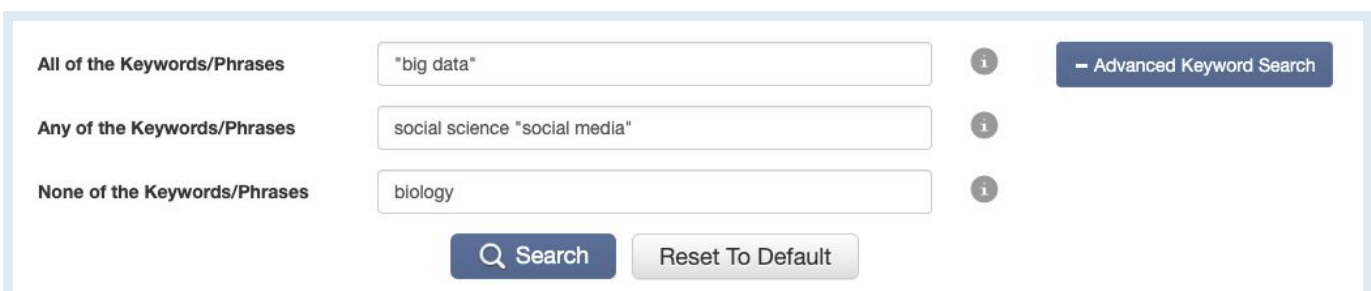
Next, you will try out how to search on GrantForward by keywords to find grant opportunities that match your research topics. Simply follow these steps:

- 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.



The screenshot shows the Grant Search interface. At the top, there is a navigation bar with tabs: Pre-solicitations, Grants, Awards, Sponsors, Researchers, Administrator Console, Supports, and How-to. Below the navigation bar, there are sub-tabs: Search Grant Opportunities, Saved Searches, Recommendations, Favorites/Tags <sup>new!</sup>, History, and Shared. The main heading is "Grant Search". Below the heading, there is a search box labeled "All of the Keywords/Phrases" containing the text "big data". To the right of the search box is an information icon (i) and a button labeled "+ Advanced Keyword Search". Below the search box are two buttons: "Search" and "Reset To Default".

- 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.



The screenshot shows the Advanced Keyword Search interface. It features three search boxes. The first box is labeled "All of the Keywords/Phrases" and contains the text "big data". The second box is labeled "Any of the Keywords/Phrases" and contains the text "social science "social media"". The third box is labeled "None of the Keywords/Phrases" and contains the text "biology". To the right of each search box is an information icon (i). To the right of the search boxes is a button labeled "- Advanced Keyword Search". Below the search boxes are two buttons: "Search" and "Reset To Default".

GrantForward **QuickTip**  
For Researchers

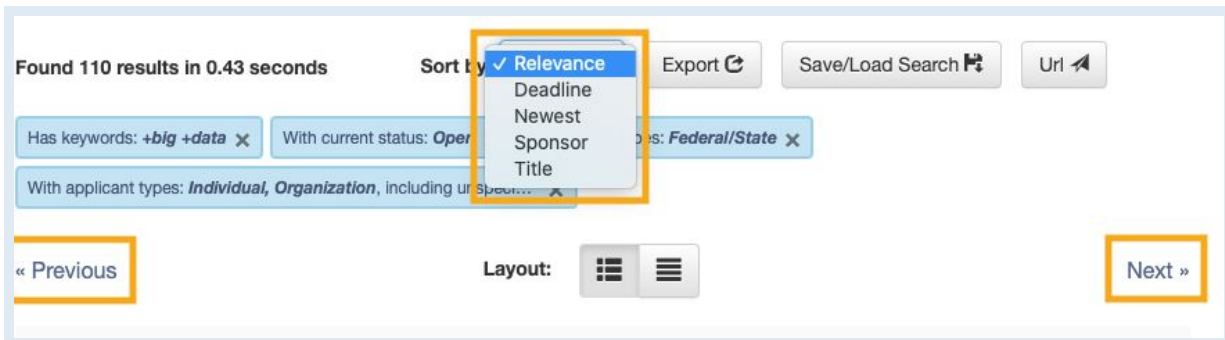
Trying a Keyword Search →

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.

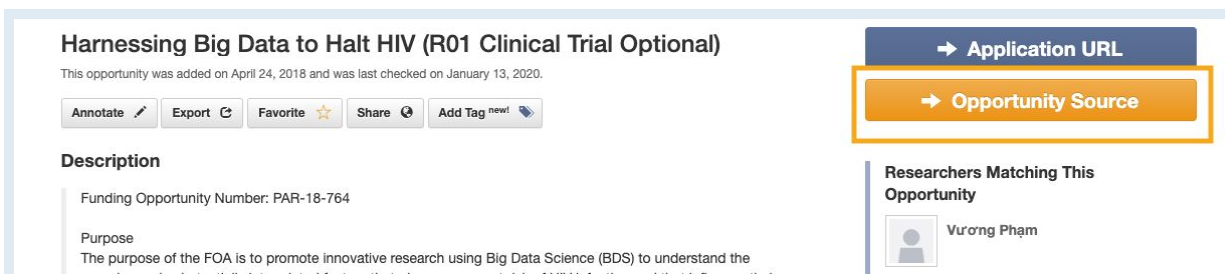
- 1 At the top of the results, you can see the summary of the search conditions. You can sort the results by **Relevance**, **Deadline**, or other properties. You can navigate to the **Next** or **Previous** page of results.



- 2 Each result will list the 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 **i**.
- 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.

The screenshot displays the GrantForward search interface. On the left, there are filter sections for Sponsors, Categories, and Deadline. The Deadline filter is set to 01/15/2020 to 08/06/2020. The main search area shows 28 results found in 0.88 seconds, sorted by Relevance. A search summary bar lists various filters: Has keywords: "+big data" social science "social media" -biology; Deadline is between 01/15/2020 and 08/06/2020; With current status: Open; Of sponsor types: Federal/State, Academic; Of grant types: Research Project; Not of grant types: Internship/Work-study; With applicant types: Individual, Senior Researcher, Organizatio...; Not with applicant types: Undergraduate, including unspecified gr... The search results list includes a grant titled "Harnessing Big Data to Halt HIV (R01 Clinical Trial Optional)" from the U.S. Department of Health and Human Services, National Institutes of Health, with 3 more sponsors. The grant description mentions NIH's interest in promoting and applying big data Science technologies, computing, informatics, and analytics to address gaps in our understanding of HIV transmission risks, social networks, and the HIV treatment continuum, including comorbidities ... with expertise in epidemiology, bioinformatics, mathematical modeling, statistics, social and...

GrantForward QuickTip  
For Researchers  
Searching With Advanced Search Filters

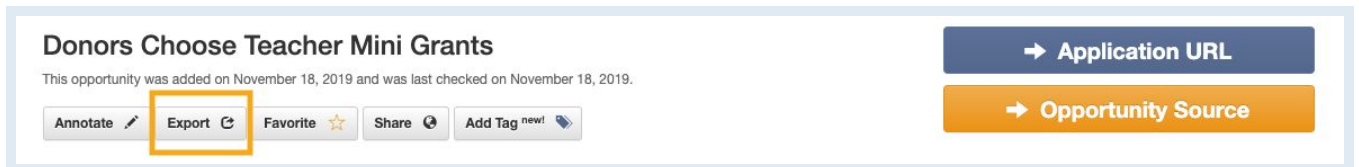
For more guidance, you can view a step by step demo--  
**QuickTip: Searching with Advanced Search Filters**



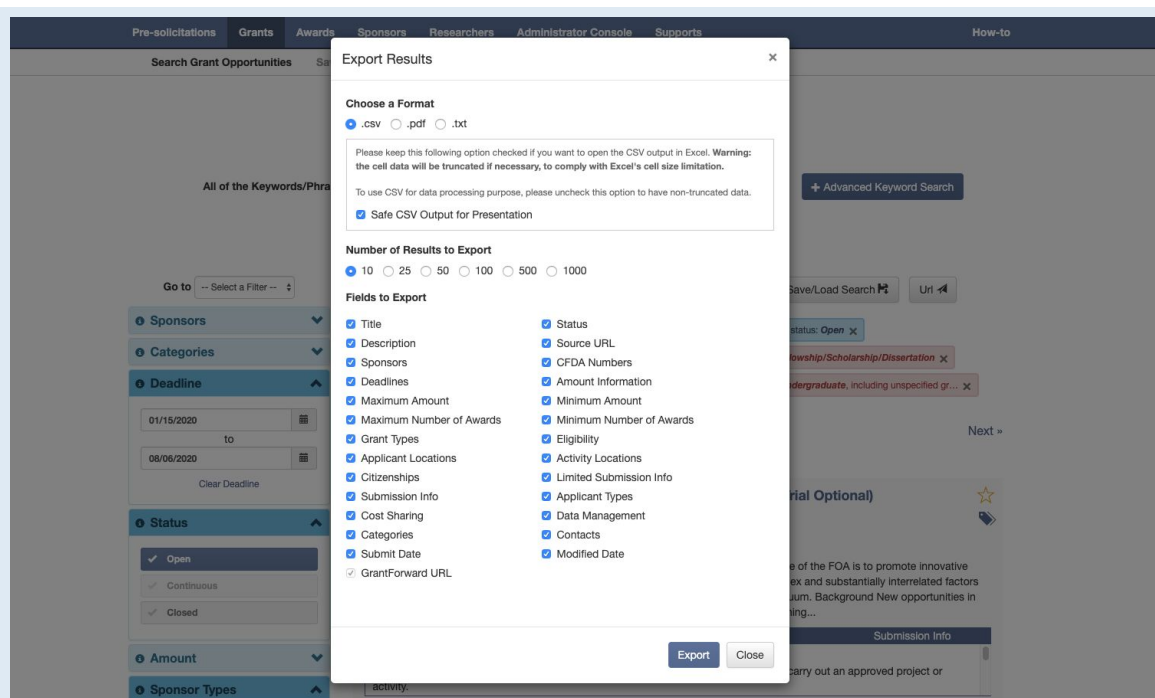
# Exporting/Favoriting/Add Tag Grants


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.




- 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.

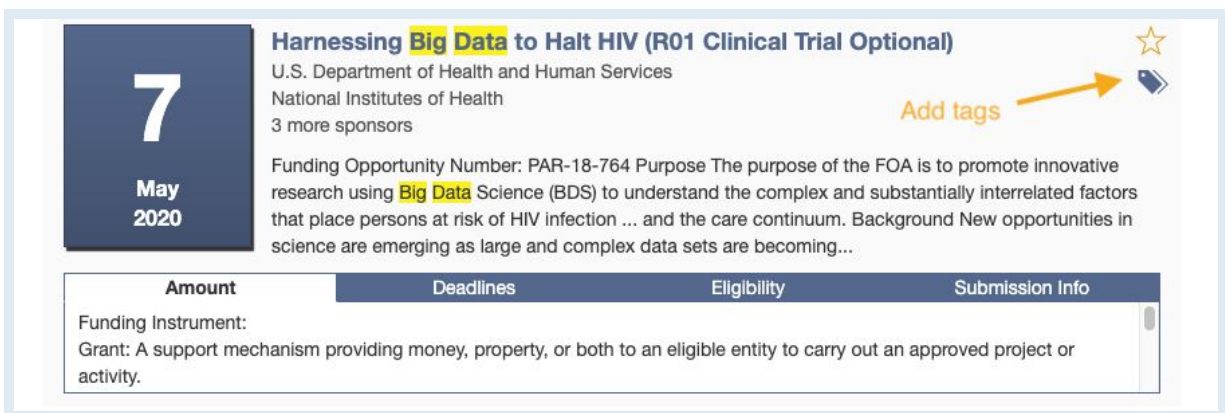


- 2** You can **favorite a grant** for quick access by clicking on the  button. You can view all favorited grants at the **Favorites/Tags** page under the **Grants** tab.



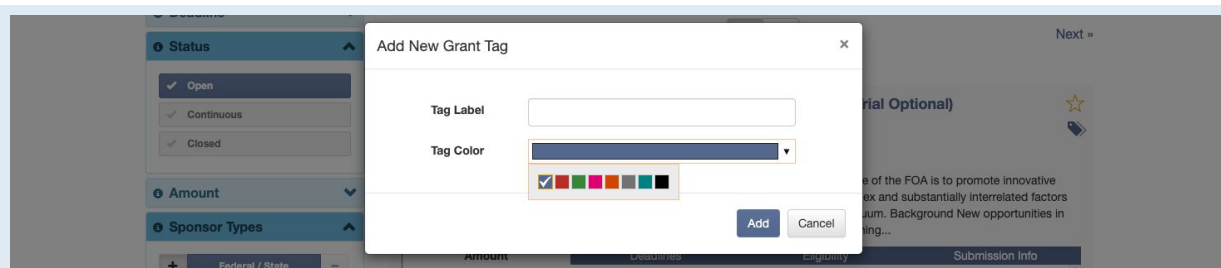
The screenshot shows a grant card for "Harnessing Big Data to Halt HIV (R01 Clinical Trial Optional)". The card includes a large number "7" and the date "May 2020". The grant title is "Harnessing Big Data to Halt HIV (R01 Clinical Trial Optional)". The sponsor is "U.S. Department of Health and Human Services, National Institutes of Health, 3 more sponsors". The description starts with "continuum. NIH is interested in promoting and applying big data Science technologies, computing, informatics, and analytics to address gaps in our understanding of HIV transmission risks, social networks, and the HIV treatment continuum, including comorbidities ... with expertise in epidemiology, bioinformatics, mathematical modeling, statistics, social and...". At the top right, there is a star icon and a button labeled "Mark a grant as favorite" with an arrow pointing to the star.

- 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.



The screenshot shows the same grant card as above. At the top right, there is a tag icon (a blue tag with a white border) and a button labeled "Add tags" with an arrow pointing to the tag icon.

- 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.

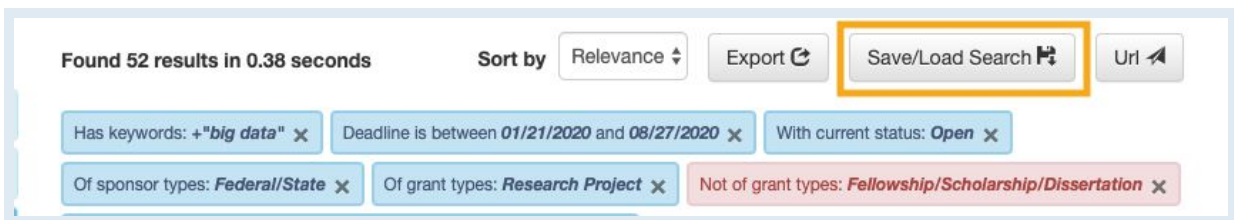


The screenshot shows a dialog box titled "Add New Grant Tag" with a close button (X) in the top right corner. It has two input fields: "Tag Label" and "Tag Color". The "Tag Color" field has a dropdown menu showing a color palette with a checkmark over the blue color. At the bottom of the dialog are "Add" and "Cancel" buttons.

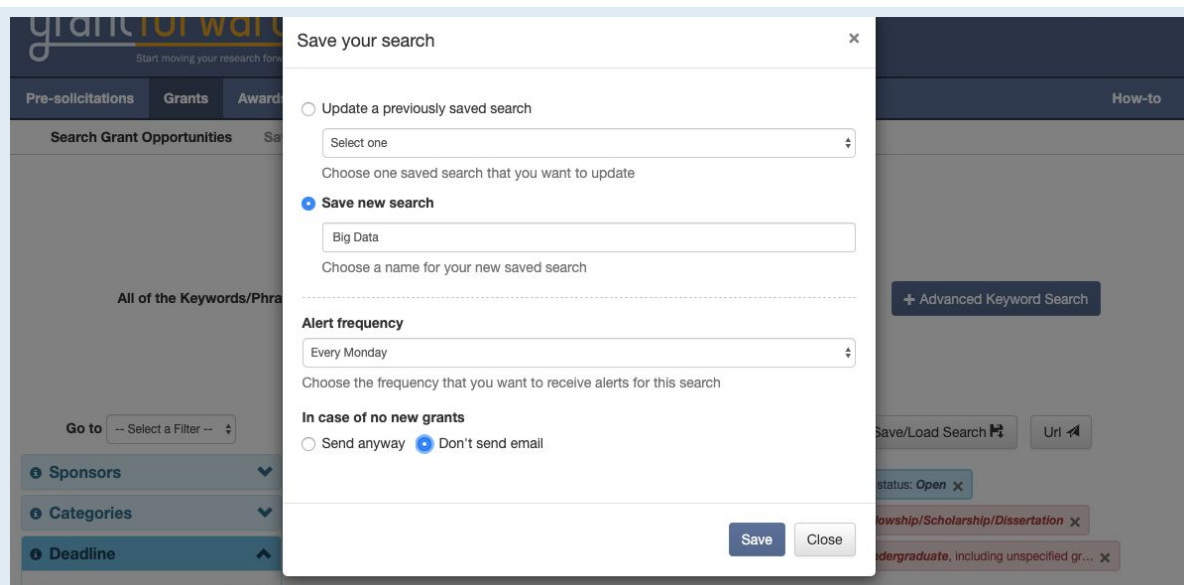
# Saving/Loading Search

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**.

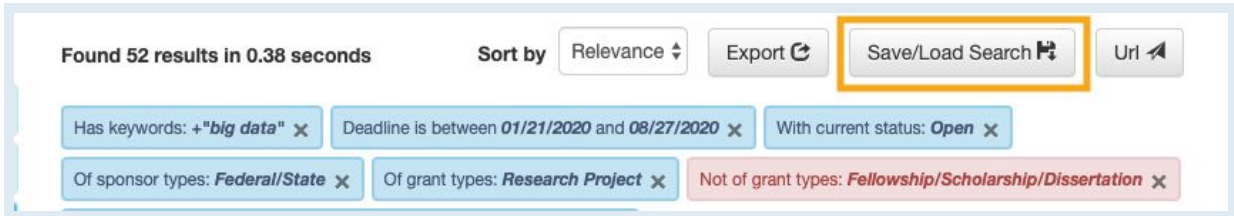


- In the pop-up dialog box, check if you want to either update a previously saved search, or create a new one. Then set the frequency (daily, weekly, or monthly) for receiving alerts of new matching grants.
- To view or edit your saved searches, you can find them at **Saved Searches** page under the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

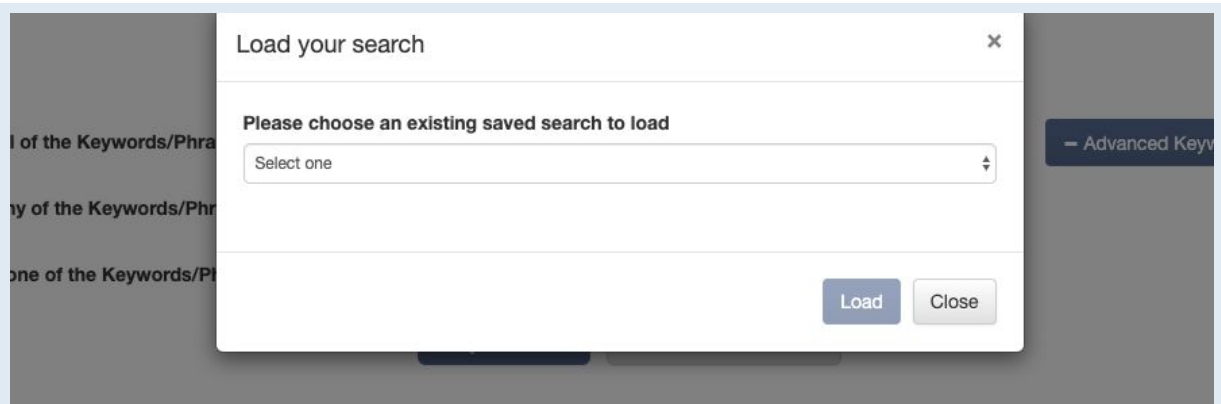




**2** Saved searches now can also be loaded directly on the search page. To load a search, click on the **Save/Load Search** button, then choose **Load a Search**.



- 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.



GrantForward QuickTip  
For Researchers

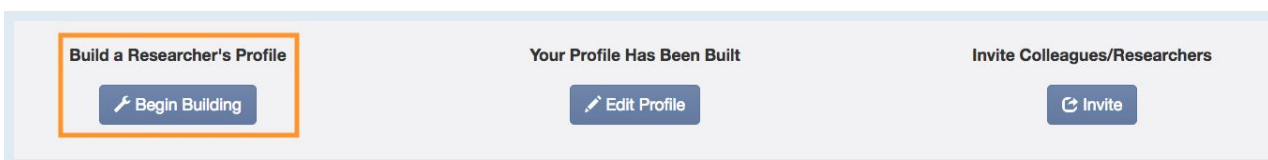
Saving Your Search →

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**.

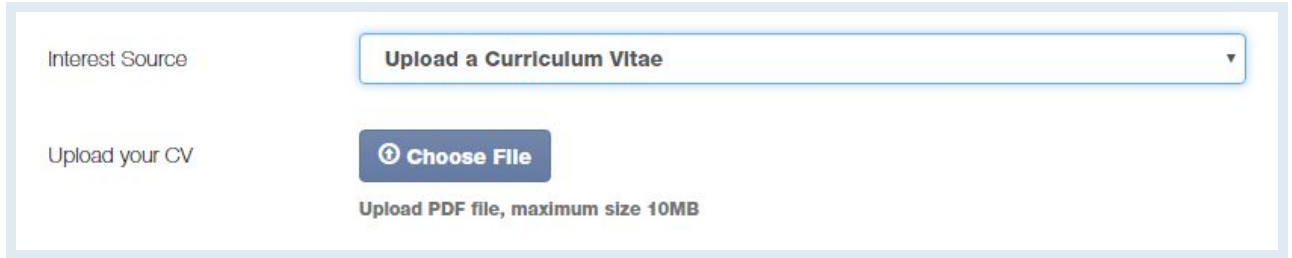


- 3 **The first page** asks about your **Basic Information**.

- 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).




Interest Source: Upload a Curriculum Vitae

Upload your CV: Choose File

Upload PDF file, maximum size 10MB

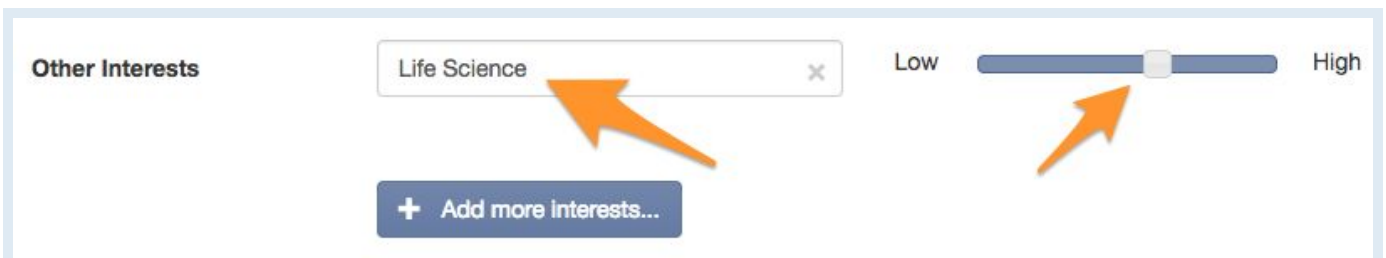
- Or, you can manually copy-and-paste your publication citation text.



Interest Source: Manually input publications

Publication Titles: e.g. M. Phillips, "Reducing the cost of Bluetooth systems", Electronics & Communication Engineering Journal, vol. 13, no. 5, pp. 204-208, Oct. 2001

- 5** 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.

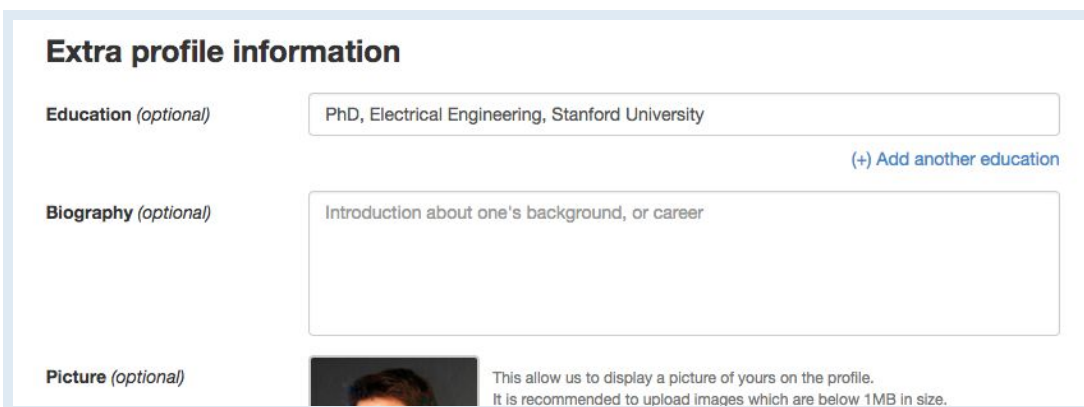


Other Interests: Life Science

Low High

+ Add more interests...

- 6** 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.



**Extra profile information**

Education (optional): PhD, Electrical Engineering, Stanford University (+) Add another education

Biography (optional): Introduction about one's background, or career

Picture (optional): This allow us to display a picture of yours on the profile. It is recommended to upload images which are below 1MB in size.

7 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**

**Profile Viewability**  Private  
The profile is private and is only visible to the members of the same institution.

**Display Basic Information**  No

**Display Research Interest**  Yes

**Display Publications**  No

**Display Colleagues**  Yes

**Display Co-Authors**  Yes

**Display Also Viewed Profiles**  Yes

**Display Recommendations**  Yes

**Receive Recommendation Emails** Weekly

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

**Profile submission completed successfully!**

You have created profile for researcher Kevin Chang in your institution. Later on he/she can claim this profile and use it to explore GrantForward's funding options.

The rebuilding process will take a while, depending on whether you have updated interest information or not. In the mean time you can try:

- [Build a profile for another researcher](#)
- [Search for funding opportunities](#)

**Building profile for Kevin Chang**

The process can take anywhere from 5 to 20 minutes and continue even if you leave this page

9 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**.

GrantForward CaseStudy:  
For Researchers

How Can I Create a  
Good Researcher  
Profile?

Your researcher profile is important. It captures your research interests, which then determine what grants will be recommended to you. It also presents information about your research, so your colleagues and other researchers can find you to collaborate.

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.

The screenshot shows a researcher profile for Kevin Chang. The profile includes a header with a photo and basic information: Title (Professor), Department (Department of Computer Science), Institution (University of Illinois Urbana-Champaign), and Email (kchang@illinois.edu). Below this is the 'Basic and Contact Info' section, followed by 'Educations' (PhD, Electrical Engineering, Stanford University) and 'Research Interests' (Social Media, Big Data, Community Detection). The 'Biography' section is currently empty. The 'Homepages' section contains a link to a Google Scholar profile. The 'Contact Information' section provides an address in Urbana, IL. To the right, there is a 'Research' section with an 'Embed' button and a 'Research Interest Cloud' (a word cloud centered on 'Social Media Big Data'). Below the cloud is a 'Timeline' section showing 'View Interests by Year' from 1997 to 2017. The 'Publications' section shows a list of 106 publications, with one from 2017 highlighted: 'From Community Detection to Community Profiling, H. Cai, V. W. Zheng, F. Zhu, K. C.-C. Chang, and Z. Huang, PVLDB'. Other sections include 'Colleagues', 'Co-authors', and 'People also viewed'.

- 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.

Kevin Chang (Professor, Department of Computer Science) has a Recommendation email frequency set to Monthly. The page displays Research Interest Keywords from the profile, such as Social Media, Big Data, and Community Detection. Recommended Grants include C-STARS Life and Medical Sciences Database Research Participant and Harnessing Big Data to Halt HIV (R01). Keyword highlights are visible in the grant descriptions.

Dear Kevin Chang,

Thanks for using GrantForward. We are recommending you the grants we thought are relevant to your research interest. You can view all the recommended grants to you on GrantForward at [your recommendation page](#). We recommend grants based on the information in [your researcher profile](#). You can always [improve your profile](#) to reflect your research interests better, and therefore receive more related recommended grants.

**1. New Recommendations**  
648 opportunities were added to GrantForward since September 26, 2016. Among them, we recommend the following grants to you.

**Designing Materials to Revolutionize and Engineer our Future**  
Sponsor: National Science Foundation. Deadline: Jan 17, 2017

**Big Data** science, providing real access to materials data, and educating the future MGI workforce. Specifically, achieving this goal will involve modeling, analysis, and computational simulations, validated and verified through sample preparation ...

machine learning, **data mining**, and sparse approximation; **data** infrastructure that is accessible, extensible, scalable, and sustainable; the development, maintenance, and deployment of reliable, interoperable, and reusable software for the next-generation design ... [Read More](#)

GrantForward CaseStudy:  
For Researchers  
How Can I Tailor My  
Grant  
Recommendations?

After creating a Researcher Profile, you can make sure that the grant recommendations you are receiving are matching your research needs by tailoring your recommendation settings.

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