Welcome to GrantForward!

In our Administrator Guide, we will help you through the basics of using GrantForward as an administrator by going over the administrator console, how to have members of your institution test out GrantForward, and AS/AP profile creation. Once you learn the basics of using GrantForward as an administrator, you’ll be helping your institution move their research forward in no time.

In this Administrator Guide we will cover:

- Getting Members Started
- Linking to GrantForward
- Annotating Grants
- Disseminating Grants
- Managing Users
- Checking Usage Reports
- Creating Profiles
Getting Members Started

To get the most out of GrantForward, you want to make sure people within your institution know about it. We've provided a few ways to help get your members started with GrantForward.

Tools for Administrators

To help get members started with moving their research forward, we've created tools for you to help inform your institution about their access to GrantForward. This includes an email template to send out to members in your institution as well as a Welcome Guide for new institution members to learn how to use GrantForward.

Email Template

The email includes summary information about GrantForward, how to log in, and a Welcome Guide for new users to learn about all the features of GrantForward.

Welcome Guide PDF

The Welcome Guide covers the necessary basics for new users to be able to learn how to use GrantForward to start moving their research forward.

Linking to GrantForward

In order for your members to easily find GrantForward, you can go to www.grantforward.com/link-to-us to easily link to us from your website. This page will give you additional details on how to embed GrantForward logos and videos on your institution’s website.
Annotating Grants

As an administrator, you have the ability to annotate grant opportunities on GrantForward with specific notes or requirements for your institution. To annotate a grant opportunity:

1. When viewing a funding opportunity, there will be an option to **Annotate** near the top of the page.

   ![Annotate option](image)

2. This will bring you to a pop up where you can add additional details for members of your institution to see when they click on the grant.

   ![Annotate pop up](image)

3. Press the **Annotate** option under **Administrator Console** to view and edit your previously annotated funding opportunities.
Disseminating Grants

To help your institution members find more grant opportunities to move their research forward, you have the ability to disseminate grant searches to specific institution members. To disseminate a grant search:

1. Choose the **Disseminate** button under the **Administrator Console**

2. You can then choose any saved search from your list of previously saved searches to send out

3. Enter the recipients' emails and the frequency at which they will receive saved search alerts.

4. Recipients can opt out of a disseminated saved search at any time.
As an Administrator, you have the ability to manage the user accounts for your institution on GrantForward, including the ability to grant others administrator status or other permissions. To manage users under your institution:

1. Under the **Administrator Console** tab, select **Manage Users**

2. On this page, you can make a user an administrator, only allow them to edit submitted grants, or remove them entirely from the administrator console.

3. If a member can only edit grants, they will not have access to usage reports or shared searches.
Checking Usage Reports

With administrator status on GrantForward, you have the ability to check usage reports to view the frequency your institution members use GrantForward, the amount of grant searches conducted by your institution, and the most popular keywords searched by your institution. To generate a usage report:

1. Under the **Administrator Console** tab, choose **Usage Report**

2. Set the range of dates for the period of activity you wish to see.

3. Next you can choose which categories you want to show up in the usage report (usually, administrators choose **Select All Categories** to see the entirety of usage in their institution).
After pressing **Generate Report**, your Usage Report for the selected time frame will appear. The usage report allows you to view the interaction statistics among your institution members categorized into visitors, search, search utilities, and recommendations.

- **Visitor Statistics**
  In the Visitor Statistics section you will see the number of accounts and profiles created on GrantForward by members of your institution as well as visits to GrantForward by your members during your specified time frame.

- **Search Statistics**
  In the Search Statistics section you will see the number of searches conducted by members of your institution during your specified time frame as well as the most frequent keywords searched by members of your institution and the categories of viewed grant opportunities.
Search Utilities Statistics
In the Search Utilities Statistics section you will see the number of shared grants, exported grants, saved searches, and disseminations by members of your institution during your selected time frame as well as the frequency of saved search emails sent to your institution members.

Recommendation Statistics
In the Recommendation Statistics section you will see the number of Researcher Profiles within your institution system with grant recommendations enabled as well as the frequency of recommendation emails sent to members with this feature enabled.

If you have any questions or concerns about the data provided in the usage report, feel free to reach out to us at support@grantforward.com.
GrantForward AS/AP Profile Creation

Since your faculty and researchers are very busy, we'd like to help them use GrantForward without much hassle in logistics. With our Auto Sign-up/Auto Profile Creation service, we can automatically create their accounts and build their GrantForward Researcher Profiles so that they will start receiving grant recommendations automatically. They will also have all of the additional benefits of a Researcher Profile without needing to create one.

There are two modes for AS/AP Profile Creation:

- **Auto Pilot Mode**
  GrantForward will take care of everything from gathering information to profile creation. We will provide each institution with 100-300 automatically created profiles in each subscription cycle, and you can request additional profiles at an added cost.

- **Administrator Pilot Mode**
  You provide us with the information including researcher's names, publication URL, and CV in a spreadsheet and GrantForward will automatically create profiles for your institution members, as many as you request and free of charge.

To request AS/AP Profile Creation service, please contact support@grantforward.com

For more information and guidance on the administrator console and features for administrators, you can view a step by step tutorial video and guide for further clarity on our support page:

Administrator Console Tutorials