



Researcher Welcome Guide

Welcome to GrantForward!

In our Welcome Guide, we will help you through the basics of using GrantForward by going over making accounts, searching for funding opportunities, and creating GrantForward Researcher Profiles. Once you learn the basics of GrantForward, you'll be moving your research forward in no time.

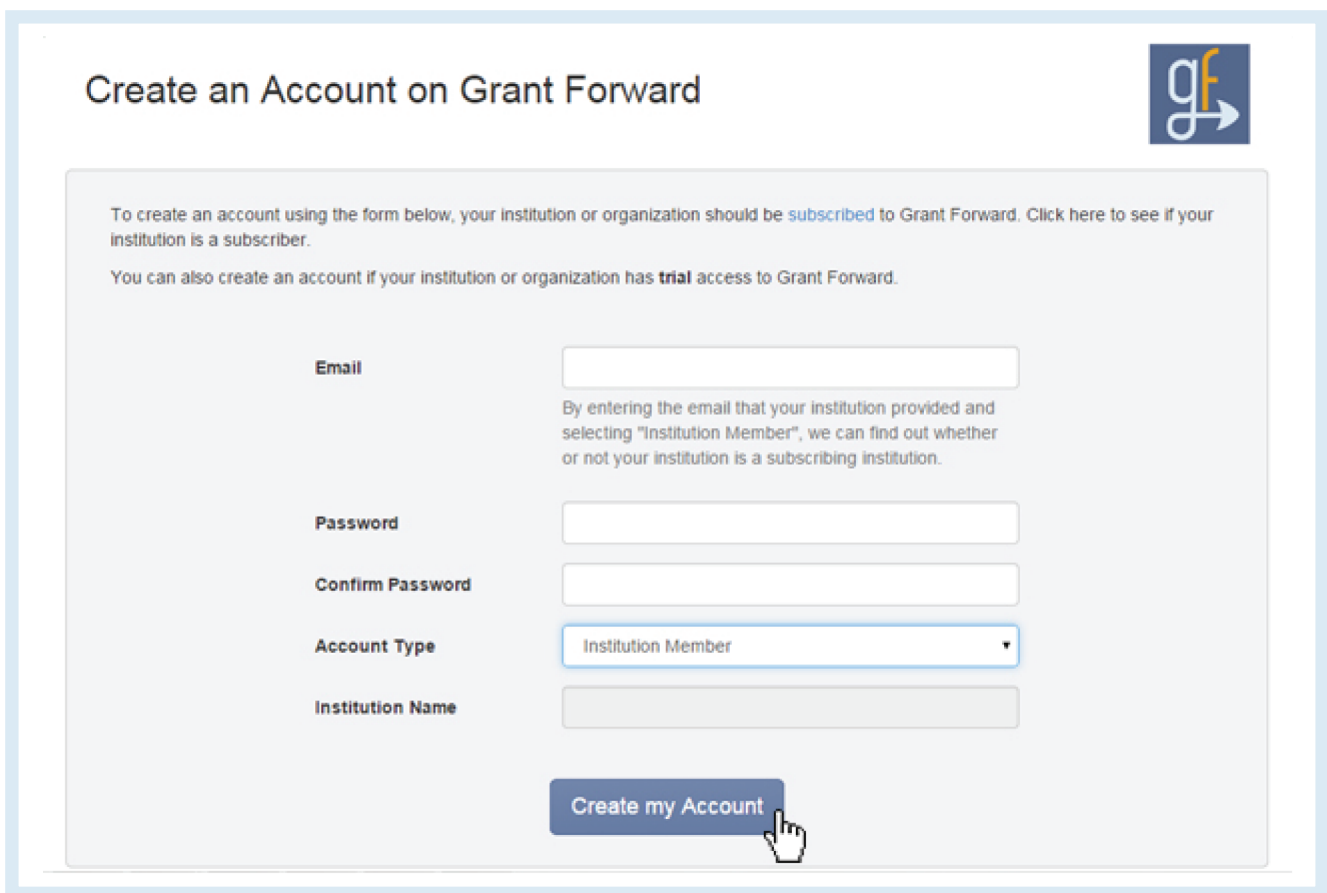
In this Welcome Guide we will cover:

- › Creating an Account
- › Trying Out a Simple Search
- › Adding Advanced Filters
- › Exporting Grants
- › Saving Your Search for Grant Alerts
- › Creating Your Profile
- › Getting to Know Your Profile
- › Getting Grant Recommendations

Creating an Account

In order to use all of the features of GrantForward, you must create your account first. To make your account, just follow these steps:

- 1 Go to the **GrantForward** homepage
- 2 Press the **Sign Up** button on the upper right hand side
- 3 On the Create and Account page, enter your institution email and create a password. You will also want to choose “Institution” as your account type.



The screenshot shows a web form titled "Create an Account on Grant Forward" with the GrantForward logo in the top right corner. The form contains the following fields and instructions:

- Email:** A text input field. Below it, a note states: "To create an account using the form below, your institution or organization should be [subscribed](#) to Grant Forward. Click here to see if your institution is a subscriber. You can also create an account if your institution or organization has **trial** access to Grant Forward. By entering the email that your institution provided and selecting 'Institution Member', we can find out whether or not your institution is a subscribing institution."
- Password:** A text input field.
- Confirm Password:** A text input field.
- Account Type:** A dropdown menu with "Institution Member" selected.
- Institution Name:** A text input field.
- Create my Account:** A blue button with a hand cursor icon pointing to it.

- 4 A confirmation email will be sent to the email you provided. Confirm by clicking on the link, and then you will have account access to GrantForward.

For more information and guidance on creating an account, you can view a step by step tutorial video and guide for further clarity on our support page:

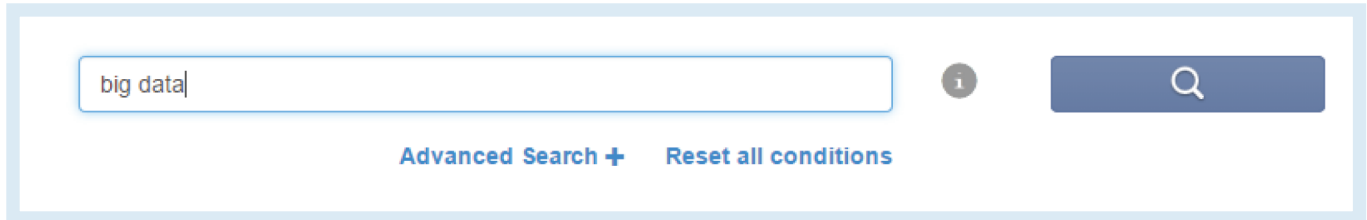
► **Creating An Account Tutorials**

Trying Out a Simple Search

Next, you will be testing out how to search on GrantForward and learning how to find grant opportunities that are right for you and your research. To start your search, simply follow these steps:

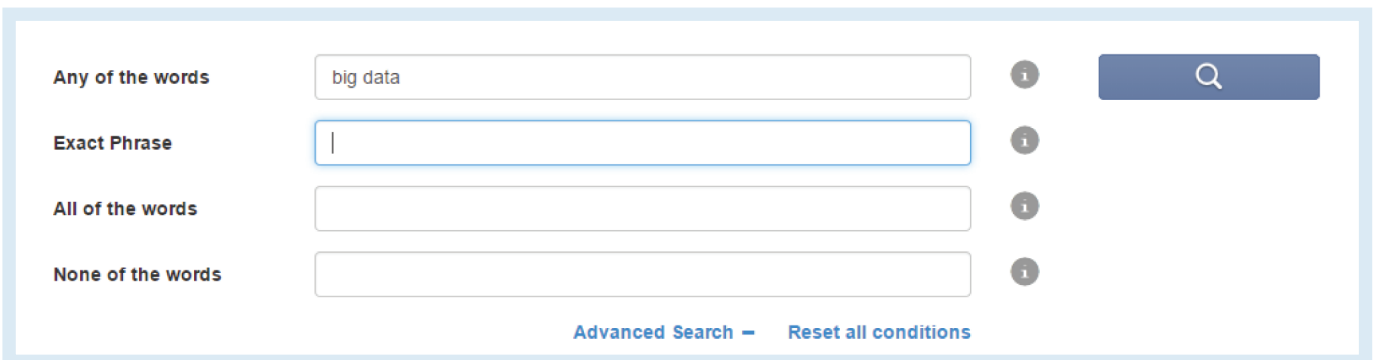
1 Under the **Search** tab, go to **Search Home**

2 In the keywords box, enter any words relevant to your field of research



The screenshot shows a search bar with the text "big data" entered. To the right of the search bar is a magnifying glass icon. Below the search bar, there are two links: "Advanced Search +" and "Reset all conditions".

3 You can refine your search by selecting advanced search or sorting by different factors



The screenshot shows the advanced search interface. It has four rows of search criteria: "Any of the words" with the text "big data", "Exact Phrase" with a single character "|", "All of the words", and "None of the words". Each row has a magnifying glass icon to its right. At the bottom, there are two links: "Advanced Search -" and "Reset all conditions".

4 Results should quickly pop up for you to sift through. On this page you can see the grant amount, deadlines, eligibility, and information for submission.

5 Press the title of the grant to get more information. From here you can also go directly to the opportunity source and application.

For more information and guidance on doing a simple search you can view a step by step tutorial video and guide for further clarity on our support page:

► [How to Search Tutorials](#)

Adding Advanced Filters

Now, you can add advanced filters to specify your search results to suit your research needs. To add advanced filters, follow these steps:

- 1 On search results page, you will see filters on the left hand side

The screenshot shows a search results page with filters on the left and search results on the right. The filters include Sponsors, Categories, Deadline, and Status. The search results show 7979 results found in 1.15 seconds, sorted by Relevance. The first result is 'Radiological/Nuclear Medical Countermeasure Product Development Program (SBIR)(R43/R44)' by the National Institutes Of Health, with a deadline of April 2015. The second result is 'Clinical Studies of Safety and Effectiveness of Orphan Products Research Project Grant (R01)' by the U.S. Food And Drug Administration, with a deadline of 15.

Sponsors ⓘ
Type sponsor name **List**

Categories ⓘ
Type category name **List**

Deadline ⓘ
Anytime to Anytime

Status ⓘ
☒ Open
☒ Continuous
☐ Closed

Found 7979 results in 1.15 seconds
Sort by Relevance ⓘ

With current status: Continuous, Open

« Previous Next »

5
April 2015
Radiological/Nuclear Medical Countermeasure Product Development Program (SBIR)(R43/R44) ☆
National Institutes Of Health
National Institute Of Allergy And Infectious Diseases
effects of radiation exposures; 2) eliminate internal radionuclide contamination (decorporation); or 3) accurately determine individual radiation exposure ... Hedge fund has the meaning given that term in section 13(h)(2) of the Bank Holding Company Act of 1956 (12 U.S.C. 1851(h)(2)). The hedge fund must have ...

| Amount | Deadline(s) | Eligibility | Submission Info |
|---|-------------|-------------|-----------------|
| Funding Instrument : Grant: A support mechanism providing money, property, or both to an eligible entity to carry out an approved project or activity. Application Types Allowed : New (Phase I, Fast-Track) | | | |

15
Clinical Studies of Safety and Effectiveness of Orphan Products Research Project Grant (R01) ☆
U.S. Food And Drug Administration
Office Of Orphan Products Development

- 2 By entering information or selecting criteria from the set options, the results for your search will automatically update. If you want more information about a filter, press the question mark icon next to the name.

The screenshot shows the Status and Sponsor Type filters. The Status filter has options for Open, Continuous, and Closed. The Sponsor Type filter has options for Is Federal/State, Is Foundation, and Is Corporate. A tooltip points to the question mark icon next to the Sponsor Type filter, stating: 'Filter the results based on where the funding opportunity is coming from. April 2016'.

Status ⓘ
☒ Open
☒ Continuous
☐ Closed

Sponsor Type ⓘ
☒ Is Federal/State
☒ Is Foundation
☒ Is Corporate

Funding Instrument Grant: A support mechanism providing money, property, or both to an eligible entity to carry out an approved project or activity.
Application Types Allowed

15
April 2016
Amount
\$20,000 to support excep

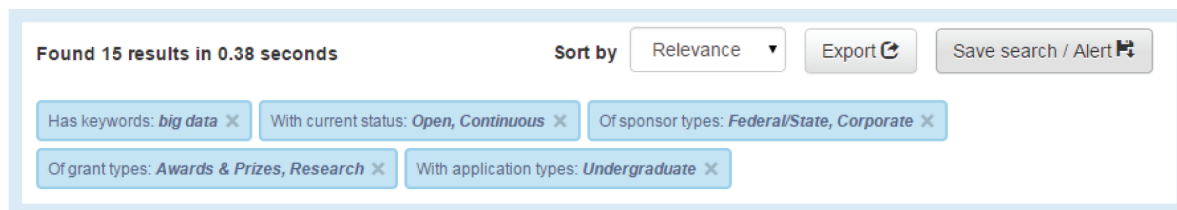
For more information and guidance on using advanced filters for your grant search, you can view a step by step tutorial video and guide for further clarity on our support page:

► [Using Search Filters Tutorials](#)

Exporting Grants

Now that you have found grant opportunities that will move your research forward, you can export the grant opportunities and download them to your computer. To export grants:

- 1 Click the **Export** button at the top of the search results page



Found 15 results in 0.38 seconds

Sort by Relevance

Export

Save search / Alert

Has keywords: *big data*

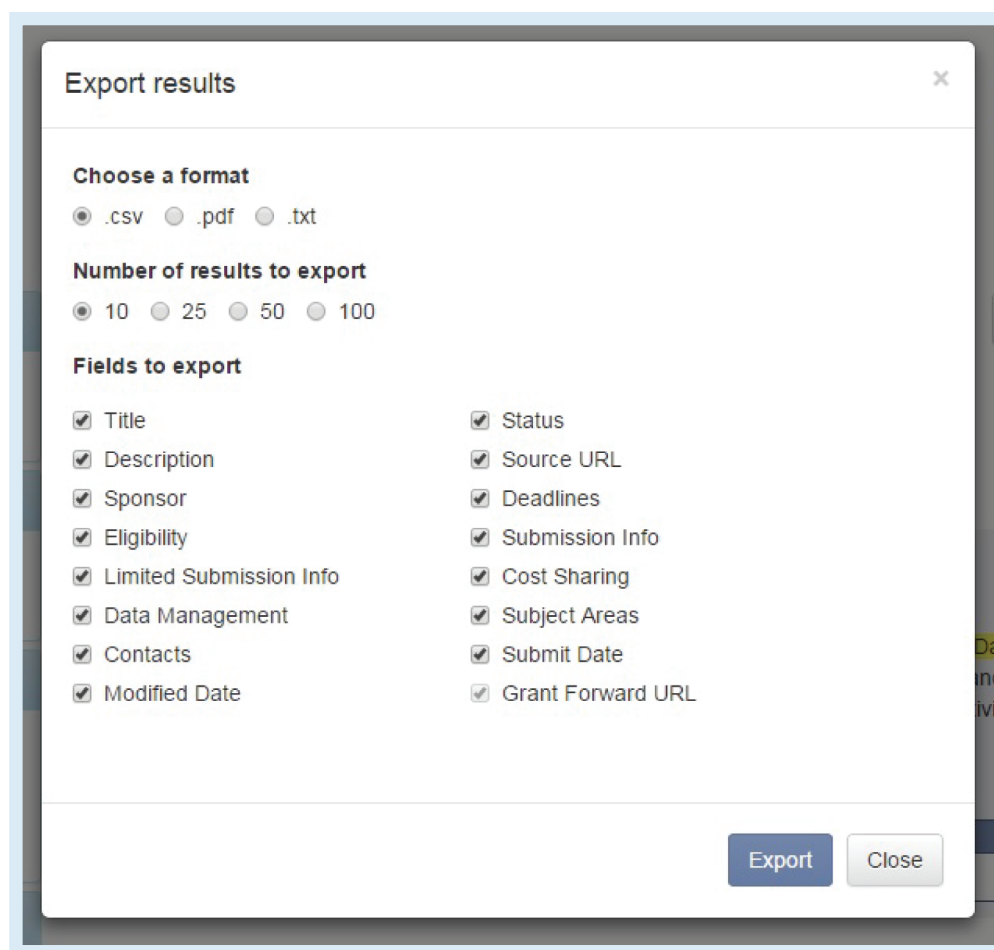
With current status: *Open, Continuous*

Of sponsor types: *Federal/State, Corporate*

Of grant types: *Awards & Prizes, Research*

With application types: *Undergraduate*

- 2 Next, specify what format you would like to download your results in, the number of results you would like to download, and the funding opportunity information you need



Export results

Choose a format

☒ .csv ☐ .pdf ☐ .txt

Number of results to export

☒ 10 ☐ 25 ☐ 50 ☐ 100

Fields to export

| | |
|---|---|
| <input checked="" type="checkbox"/> Title | <input checked="" type="checkbox"/> Status |
| <input checked="" type="checkbox"/> Description | <input checked="" type="checkbox"/> Source URL |
| <input checked="" type="checkbox"/> Sponsor | <input checked="" type="checkbox"/> Deadlines |
| <input checked="" type="checkbox"/> Eligibility | <input checked="" type="checkbox"/> Submission Info |
| <input checked="" type="checkbox"/> Limited Submission Info | <input checked="" type="checkbox"/> Cost Sharing |
| <input checked="" type="checkbox"/> Data Management | <input checked="" type="checkbox"/> Subject Areas |
| <input checked="" type="checkbox"/> Contacts | <input checked="" type="checkbox"/> Submit Date |
| <input checked="" type="checkbox"/> Modified Date | <input checked="" type="checkbox"/> Grant Forward URL |

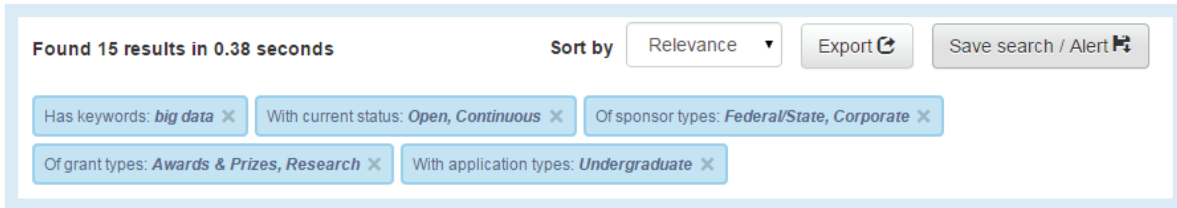
Export Close

- 3 Once you are done configuring your exported list, click **Export** and your file will begin downloading

Saving Your Search for Grant Alerts

After setting all of the filters as you want them, you can save that search to come back to it later and get email alerts of new grant opportunities that become available that fit your search criteria. To save your search:

- 1 First press the **Save Search/Alert** button above the search results.



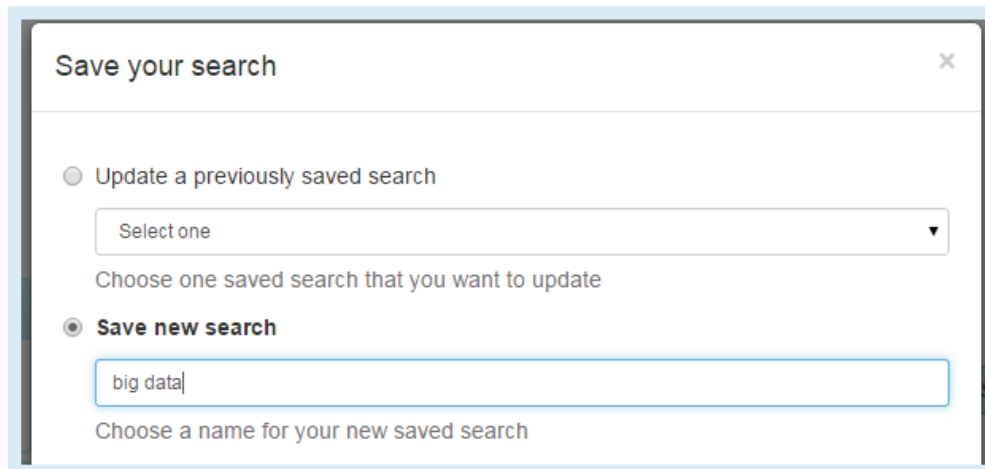
Found 15 results in 0.38 seconds

Sort by Relevance Export Save search / Alert

Has keywords: *big data* With current status: *Open, Continuous* Of sponsor types: *Federal/State, Corporate*

Of grant types: *Awards & Prizes, Research* With application types: *Undergraduate*

- 2 A pop-up will ask you if you want to either update a previously saved search, or create a new saved search.



Save your search

☐ Update a previously saved search

Select one

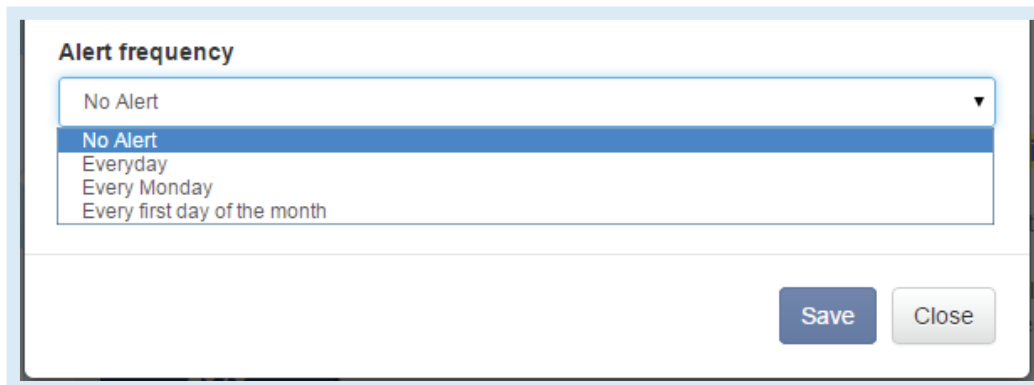
Choose one saved search that you want to update

☒ Save new search

big data

Choose a name for your new saved search

- 3 Next, you will set the alert frequency for grant alerts when new funding opportunities are added to your search criteria.



Alert frequency

No Alert

No Alert

Everyday

Every Monday

Every first day of the month

Save Close

- 4 To see and edit your save searches, you can find them under the **Search** tab by clicking the **Saved Searches** button.

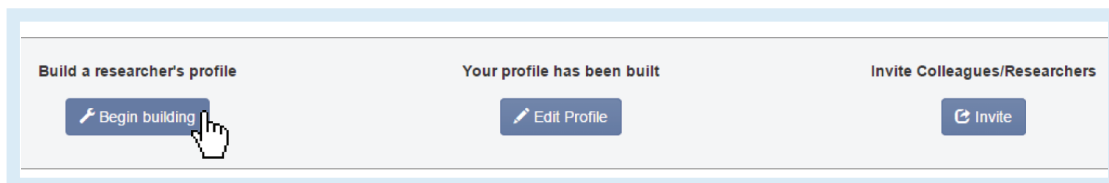
For more information and guidance on saving your search, you can view a step by step tutorial video and guide for further clarity on our support page:

Creating Your Profile

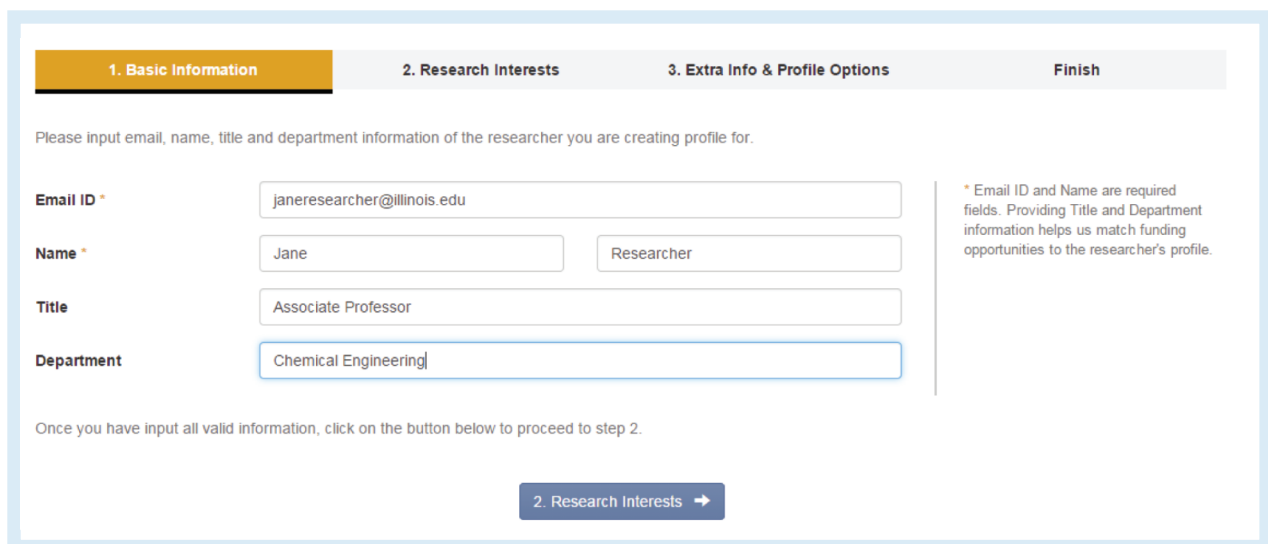
With a researcher profile on GrantForward, you will be able to easily make a researcher homepage to display your past experiences and publications. To create a profile, follow these steps:

1 Under the **Profile** tab, press **Create Profile**

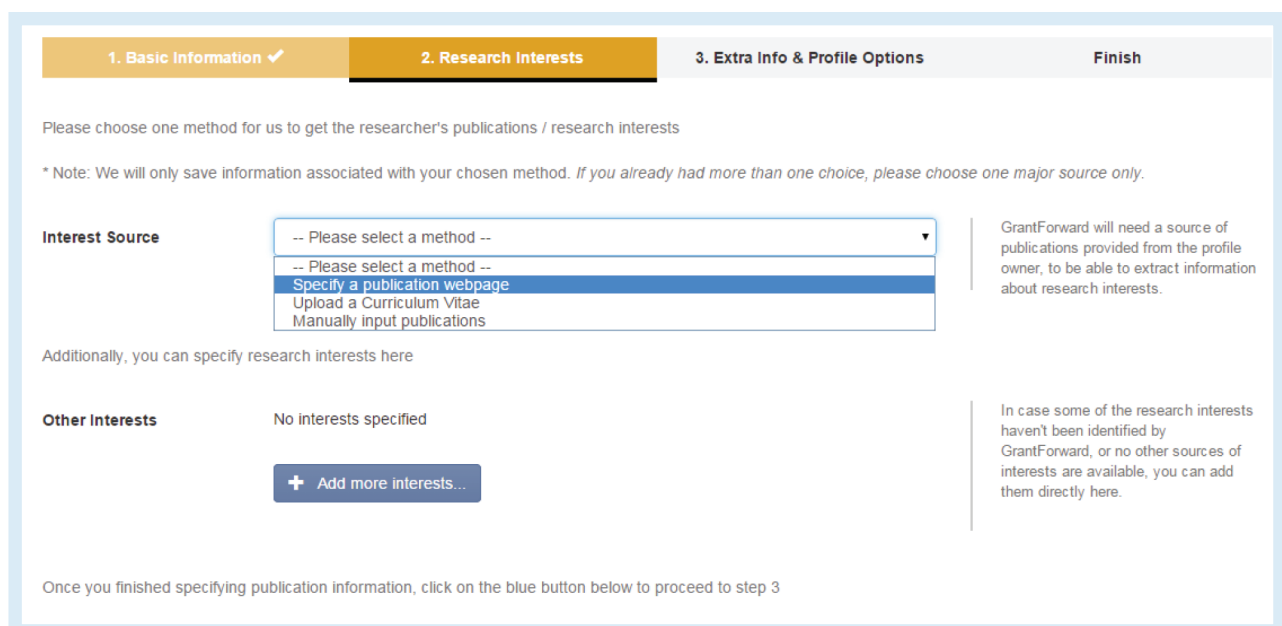
2 On the following page, select the **Begin Building** button



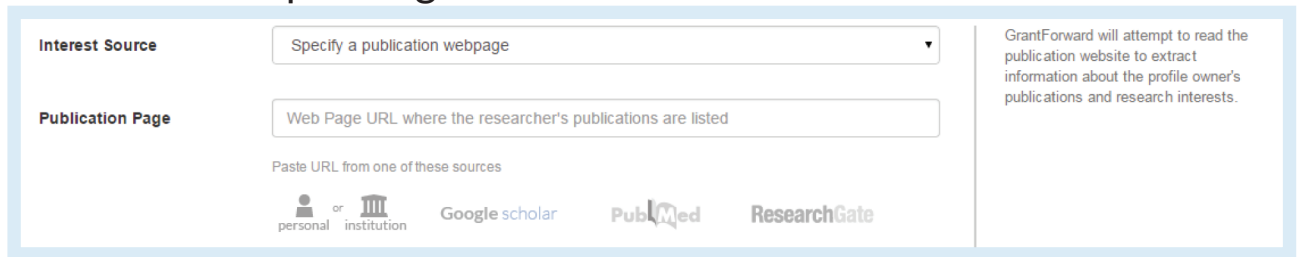
3 Enter all the basic information on the first page



4 On the next page there are three ways to connect your information to your profile by choosing from the **Interest Source** dropdown

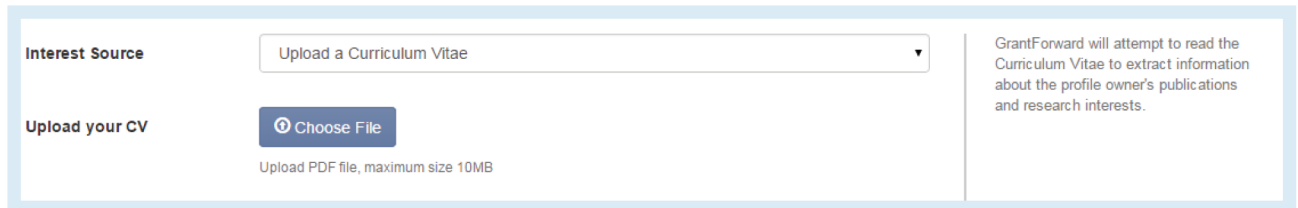


- ▶ If you have an existing research or publication webpage, enter the URL into the corresponding text box.



The screenshot shows the 'Interest Source' dropdown menu with 'Specify a publication webpage' selected. Below it, the 'Publication Page' text box is labeled 'Web Page URL where the researcher's publications are listed'. A note below the text box says 'Paste URL from one of these sources' and lists 'personal' (with a person icon), 'or', 'institution' (with a building icon), 'Google scholar', 'PubMed', and 'ResearchGate'. To the right, a text box explains: 'GrantForward will attempt to read the publication website to extract information about the profile owner's publications and research interests.'

- ▶ You can also upload your current CV to GrantForward and your profile interests will be automatically updated.



The screenshot shows the 'Interest Source' dropdown menu with 'Upload a Curriculum Vitae' selected. Below it, the 'Upload your CV' section has a 'Choose File' button and a note: 'Upload PDF file, maximum size 10MB'. To the right, a text box explains: 'GrantForward will attempt to read the Curriculum Vitae to extract information about the profile owner's publications and research interests.'

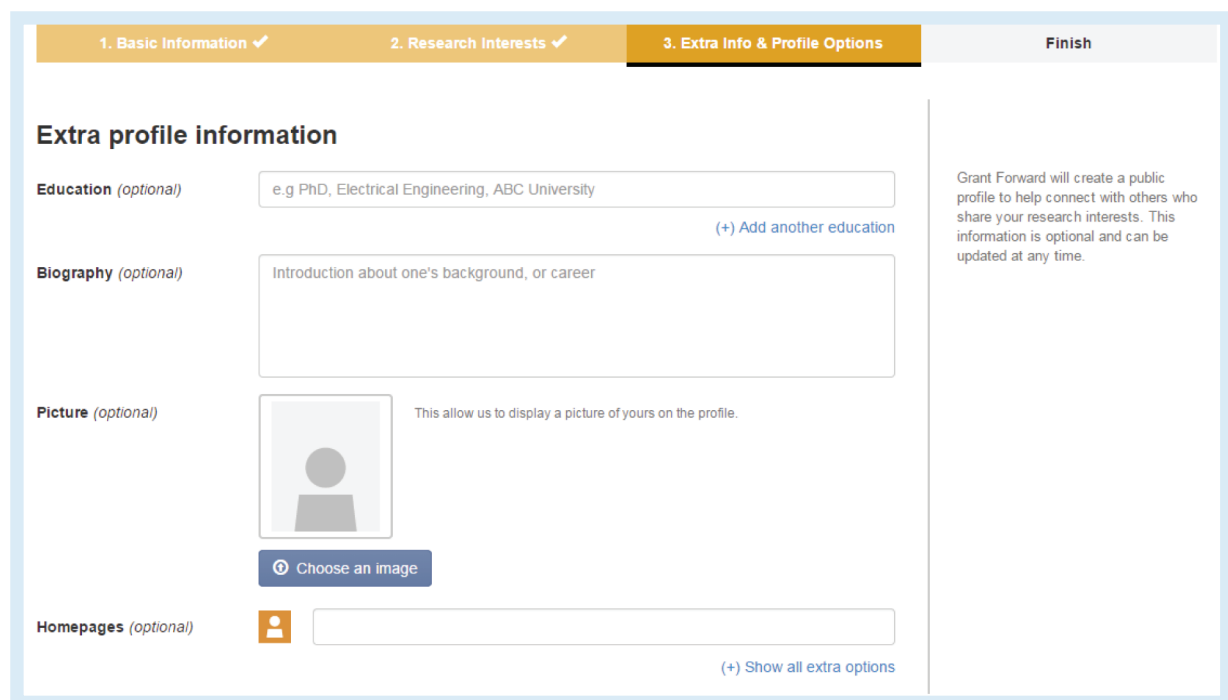
- ▶ The final option is to manually input your publications into the text box.



The screenshot shows the 'Interest Source' dropdown menu with 'Manually input publications' selected. Below it, the 'Publication Titles' text box contains an example: 'e.g. M. Phillips, "Reducing the cost of Bluetooth systems", Electronics & Communication Engineering Journal, vol. 13, no. 5, pp. 204-208, Oct. 2001'. To the right, a text box explains: 'GrantForward will attempt to read the publications information specified on the textbox to extract information about the profile owner's publications and research interests.' Below this, a tip says: '* Tip: Try to separate publications by a new line for generally better extracting result.'

5

Under the **Extra Info & Profile Options** section, you can customize your profile by entering additional information and a photo of yourself.



The screenshot shows the 'Extra Info & Profile Options' section of the GrantForward profile setup. It has a progress bar at the top with four steps: '1. Basic Information' (checked), '2. Research Interests' (checked), '3. Extra Info & Profile Options' (active), and 'Finish'. The section is titled 'Extra profile information'. It contains four optional fields: 'Education' (with a text box containing 'e.g PhD, Electrical Engineering, ABC University' and a link to 'Add another education'), 'Biography' (with a text box containing 'Introduction about one's background, or career'), 'Picture' (with a placeholder image, a note 'This allow us to display a picture of yours on the profile.', and a 'Choose an image' button), and 'Homepages' (with a text box and a link to 'Show all extra options'). To the right, a text box explains: 'Grant Forward will create a public profile to help connect with others who share your research interests. This information is optional and can be updated at any time.'

- 6** On the bottom of the section, you can adjust your privacy settings and choose what you wish to display on your profile when other people visit your page.

Profile Options

Your profile ☒ **Public**
Everyone can see this profile page.

Displaying Basic Information ☒ **Yes**

Displaying Research Interest ☒ **Yes**

Display Publications ☒ **Yes**

Display Colleagues ☒ **Yes**

Display Co-Authors ☒ **Yes**

Display Also Viewed Profiles ☒ **Yes**

Display Recommendations ☒ **Yes**

The profile privacy options allow you to show or hide any sections of your profile, and eventually allow you to keep your profile public to everyone, or private and exclusively viewable to you and your administrative members.

Click on Finish button to confirm all information, and start building the profile.

- 7** Now your GrantForward Researcher Profile is complete!
You can view it by pressing the **My Profile** tab.
- ▶ If you wish to edit your profile, you can do so by pressing **Edit My Profile** under the **Profile** tab. This will bring you to the same option as Create my Profile, but now you will be able to change any of the information that was provided before.

For more information and guidance on creating your profile, you can view a step by step tutorial video and guide for further clarity on our support page:

▶ **Creating a Profile Tutorials**

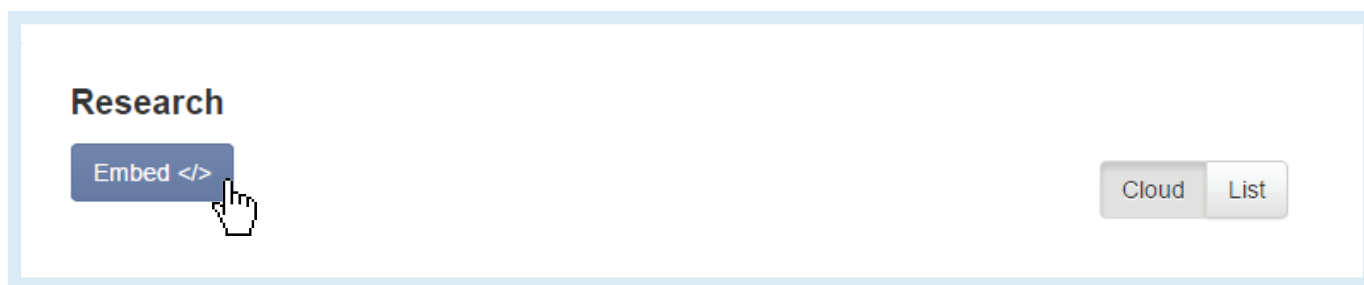
Getting to Know Your Profile

Now that you have a Researcher Profile, you can now explore your profile features and connect with other researchers that have similar research interests. To start using your profile:

- 1 Go to **My Profile** under the **Profile** tab. Here you will be able to see your profile and make changes if necessary.
- 2 Scroll down to see your Research Timeline, which is set so you can see the change in your research interests throughout the years



- 3 You can embed your Research Timeline on any website of your choosing by clicking on the **Embed** button above it



- 4 Additionally, you can use your researcher profile as your research homepage that integrates all your essential information and research. GrantFoward provides an easy to remember URL to make sharing your research page easy.

Getting Grant Recommendations

Now that you have a GrantForward Researcher Profile, you can get grant recommendations based on your research interests. You can also set up recommended grant alerts to receive notification emails. To view your recommended grants and set up email notifications:

- 1 Under the **Search** tab, you press **Recommendations** to see the full list of your recommended grants.
- 2 By editing your interests on your profile, you can change the recommended grants to be more relevant to your research needs.

The screenshot shows the 'Recommendations' page in GrantForward. At the top, there are buttons for 'Edit', 'View Current Cloud', and 'View Current List'. Below this, a message states: 'Uncheck any improper or irrelevant keywords below to make them disappear after finishing editing your profile.' A list of interests is shown with checkboxes: Psychology, Visual Perception, Media, Cognitive Perception, Art, Advertising, and Creative Theory. Below this, a section titled 'Additionally, you can specify research interests here' contains a table of 'Other Interests' with input fields, 'Low' and 'High' labels, and a slider. The interests listed are art, psychology, creative theory, media, and cognitive perception. A note on the right states: 'In case some of the research interests haven't been identified by GrantForward, or no other sources of interests are available, you can add them directly here.'

- 3 Receive notification emails by setting them on or off in the upper right hand corner of the recommendation page.

The screenshot shows the top of the 'Recommendations' page. The navigation bar includes 'Search Home', 'Saved Searches', 'Recommendations', 'Favorites', 'Shared^{new!}', and 'Sponsors^{new!}'. The user profile for 'Gabiella Peters' is shown, with a 'View Profile' button. Below the profile, it says 'Your recommendation grants are based on your following profile information' and 'Your specified keywords of interest. (view your specified keywords)'. In the top right corner, there is a 'Recommendation email' toggle set to 'Yes'.

For more information and guidance on getting grant recommendations, you can view a step by step tutorial video and guide for further clarity on our support page:

► **Profile Features Tutorials**