

RESEARCHER QUICK GUIDE

The Quick Guide helps you utilize the most robust features of GrantForward as a Researcher

IN THIS QUICK GUIDE



FIND & MANAGE GRANTS



RECEIVE GRANT RECOMMENDATIONS



GET PRE-AWARD INFORMATION

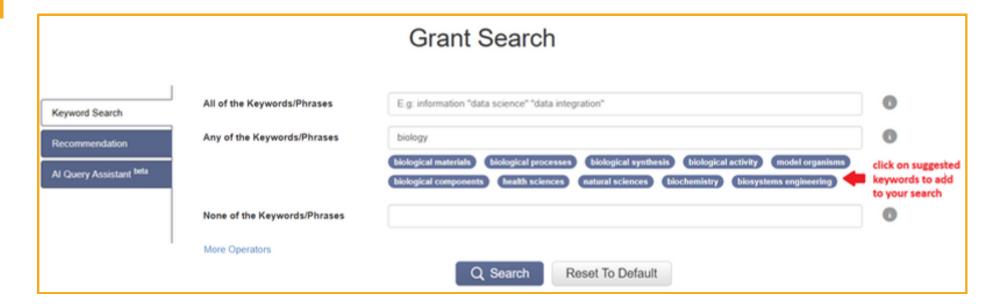
FIND GRANTS

Find Grants with Advanced Keywords and Filters

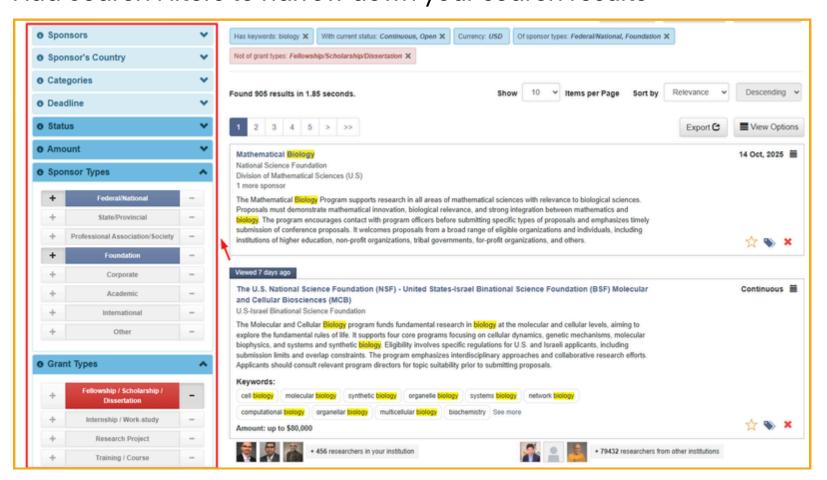
How to search for grants using keywords and filters?

1

Go to the <u>Search Grant Opportunities</u> page, and enter keywords that match your research interests and click <u>Search</u>



Add Search Filters to narrow down your search results



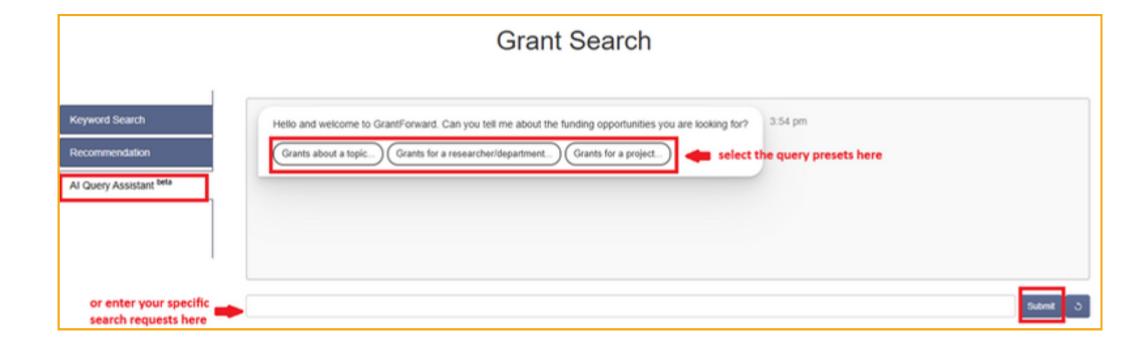
FIND GRANTS

Find Grants with Al Query Assistant

How to search for grants through conversing with our AI assistant?

- 1
- Go to the <u>Search Grant Opportunities</u> page, and switch to <u>AI Query</u>
 Assistant
- 2

Select any of our query presets to start your search, or freely enter your specific search requests in the chat box. Then click **Submit**



FIND GRANTS

Find Grants with Al Query Assistant

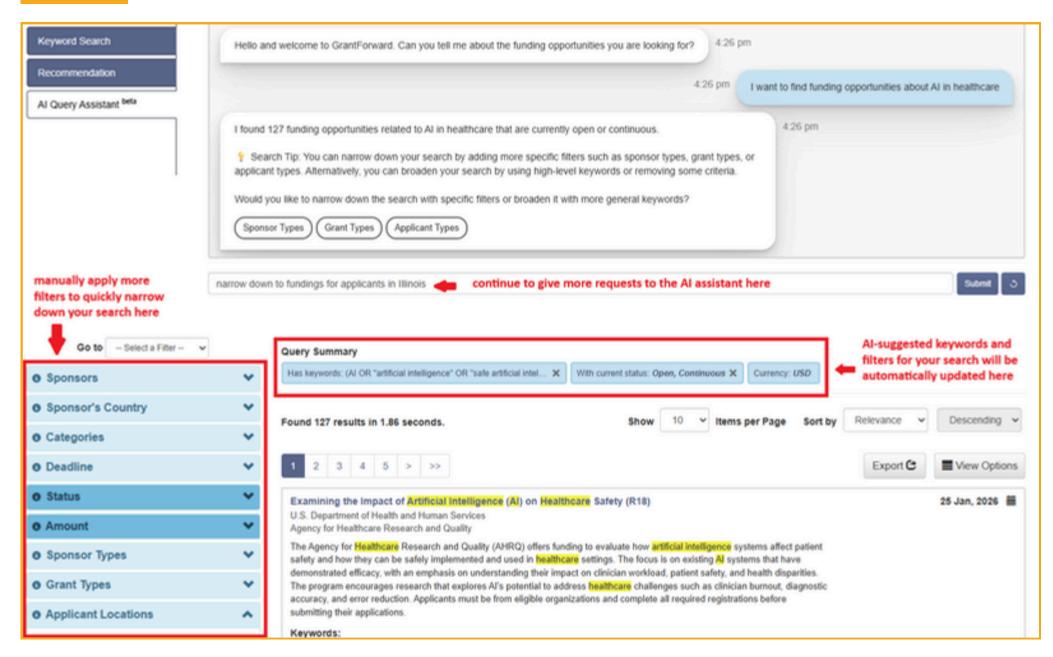
How to search for grants through conversing with our AI assistant?



Once enter your query, the search keywords and necessary filters suggested by our AI assistant will be automatically applied to your search



You can continue to further specify your search criteria in the chat box or manually add more filters to refine your search





Found 43 results in 3.33 seconds.

Has keywords: +"big data" social science "social media" -biology X

Not of grant types: Fellowship/Scholarship/Dissertation X With applicant locations: United States, including unspecified

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

Sort by Relevance V Export C

Save/Load H

Save a Search

Load a Search

Administrator

Of grant types: Research Project X

tions: United States, including unspecified grants X

MANAGE GRANTS

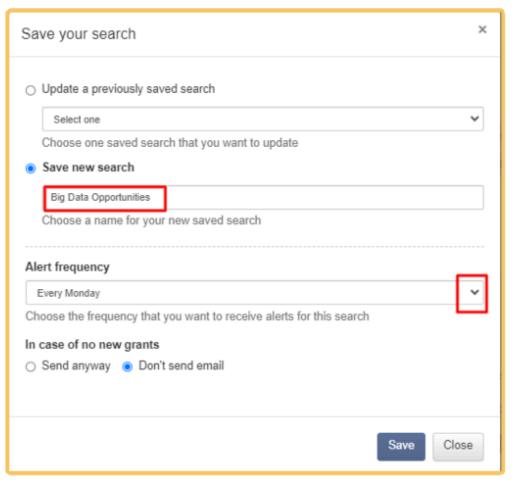
Save a Search | Receive Email Alerts

How to save my search? How to get email alerts of new opportunities?

2

In the pop-up box, name your search and set the frequency to

In the pop-up box, name your search and set the frequency to receive alerts whenever there are new grants matching your search criteria



MANAGE GRANTS

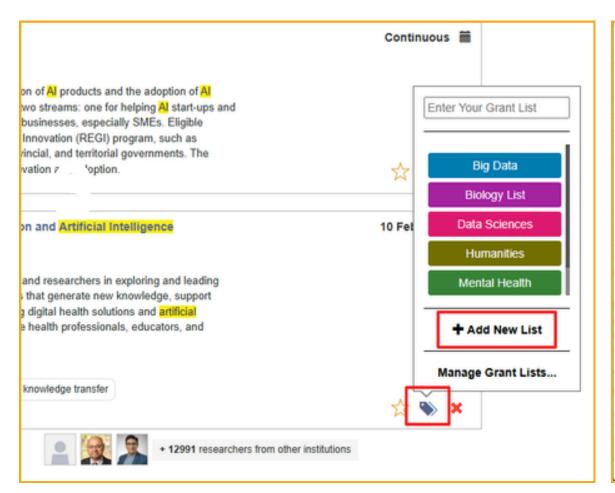
Build and Manage Grant Lists

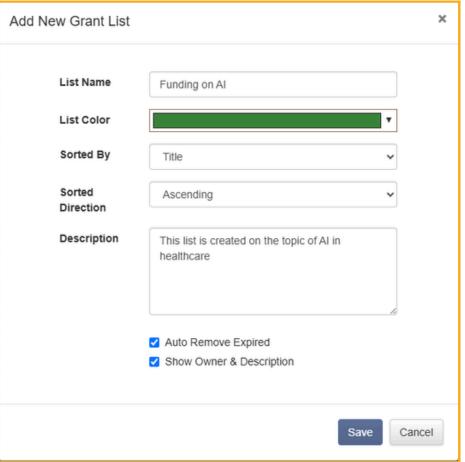
How to create a list of matching opportunities? How to make editions to that list? 1

Go to the <u>Search Grant Opportunities</u> page, set up a search with keywords and filters

2

Click on the tag icon of each desired grant, *Add New List*, and fill in the information in the dialog box to create a new list





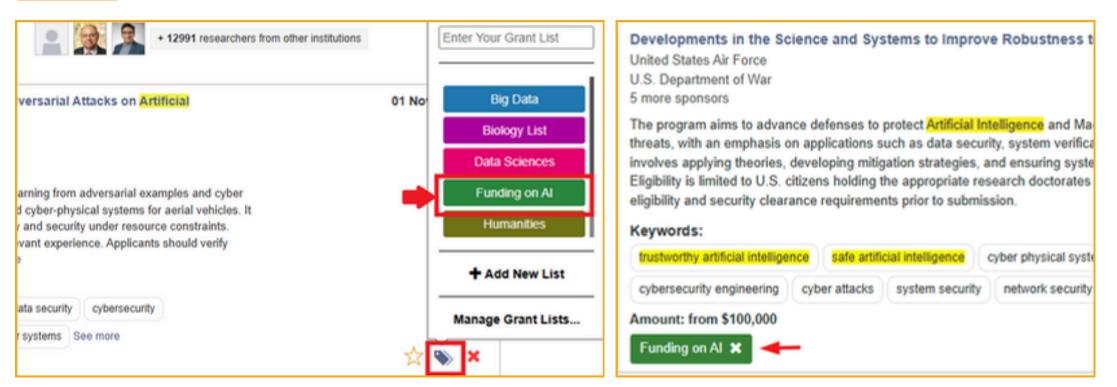
MANAGE GRANTS

Build and Manage Grant Lists

How to create a list of matching opportunities?
How to make editions to that list?

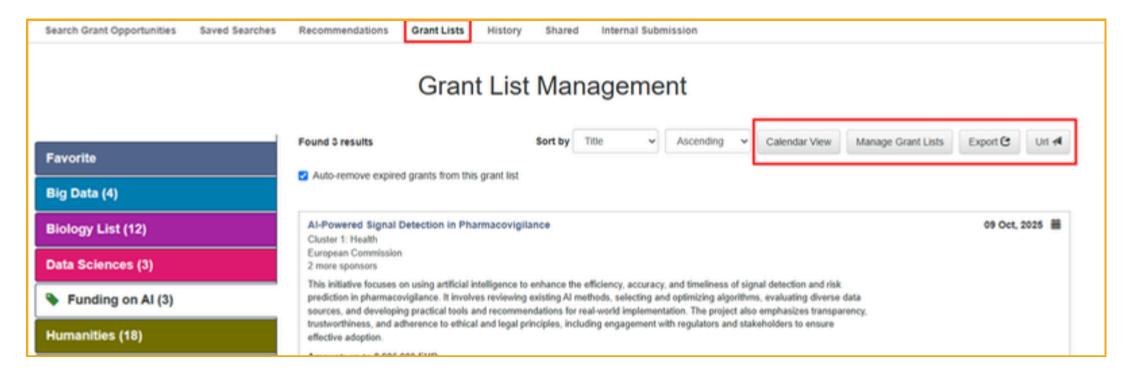
3

When you see the next desired grant for your list, click on the tag icon and choose the existing list to add





Go to the **Grant Lists** page to view, edit, export or share your grant lists with others.



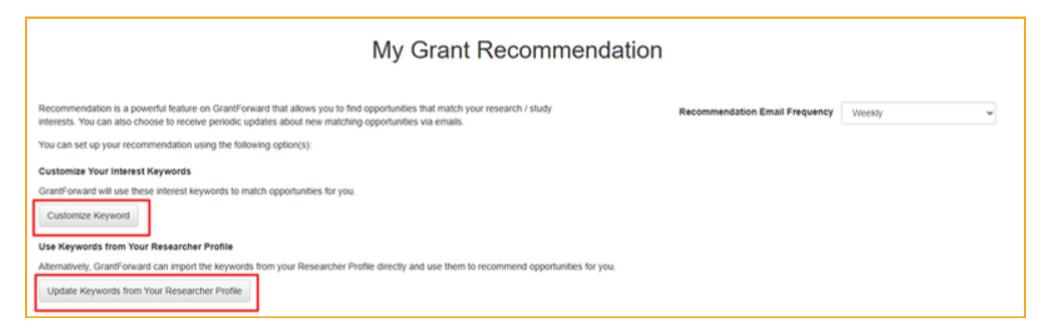
RECEIVE GRANT RECOMMENDATIONS

How to get personalized grant recommendations based on my research interests?

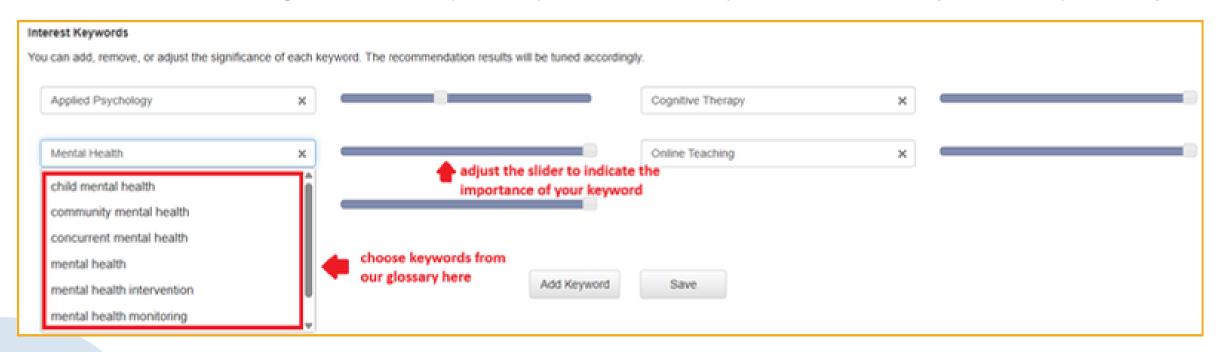


Set up grant recommendations

In order to receive grant recommendations, you should tell GrantForward what your research interests are. You can either add your interest keywords manually or import the keywords from your researcher profile



Click on Customize Keyword to add your keywords manually. You can also adjust the keywords' priority in this step. Remember to click Save



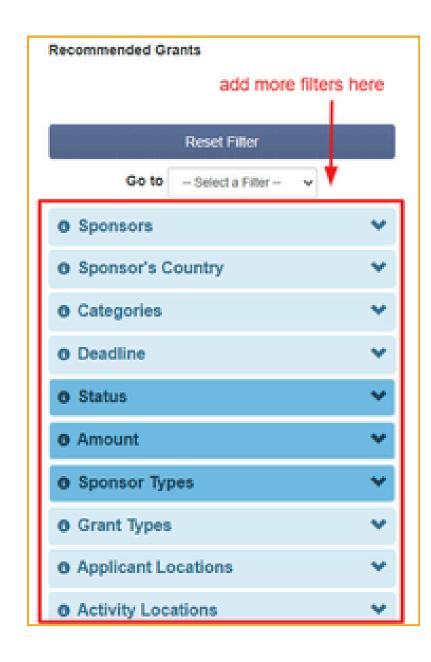
RECEIVE GRANT RECOMMENDATIONS

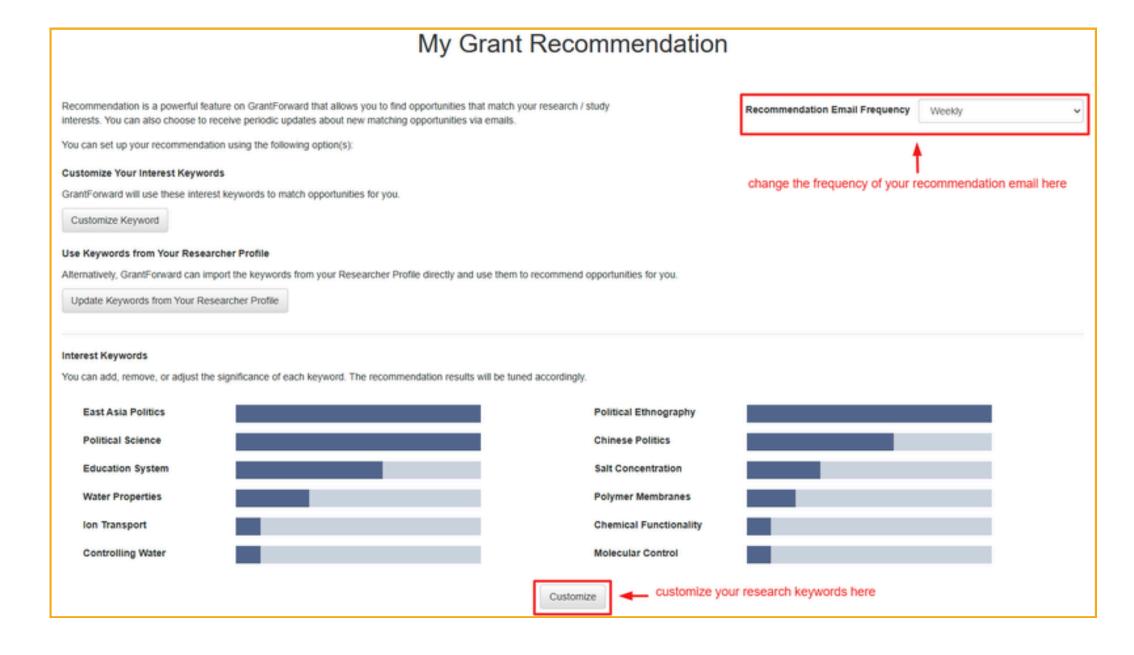
How to get personalized grant recommendations based on my research interests?

2

Tailor recommendations further

On the <u>Recommendations</u> page, add filters or click on the <u>Customize</u> button to edit the research keywords to customize your grant recommendations. You can also change the email frequency of your recommendation email on this page.





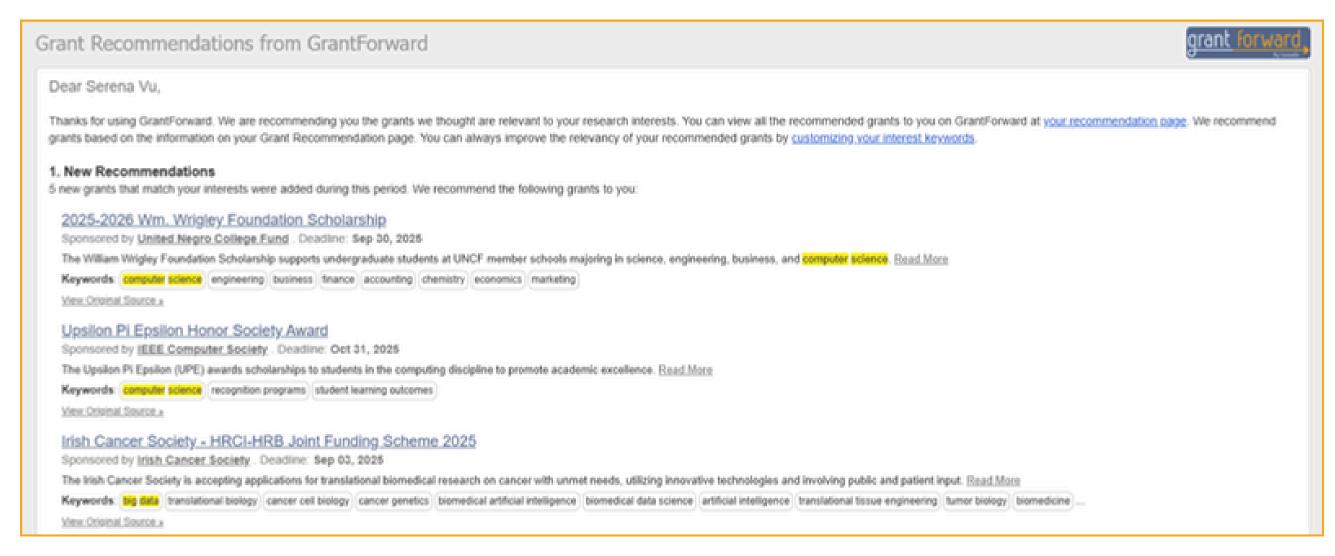
RECEIVE GRANT RECOMMENDATIONS

How to get personalized grant recommendations based on my research interests?

3

Receive automatic recommendation emails

After all the setup and editions, you will receive recommendation emails including new grants with research interest keywords highlighted



GET PRE-AWARD INFORMATION

Learn strategic information

How to find upcoming grants? Relevant sponsors? Experts/collaborators? Proposal ideas/sample awards? What my peer researchers are getting awarded?





Visit <u>Pre-solicitations</u> to see notices from funding agencies/sponsors of upcoming grants

2

Go to <u>Awards</u> page to check funded projects and get ideas for your proposal

3

Look up the <u>Sponsor Directory</u> to view detailed information and grants of over 30,000 worldwide sponsors



Search <u>Researchers</u> to find potential collaborators for your projects who share the same research interests

MORE SUPPORT

Where to find additional support while using GrantForward?

1

Contact us directly at support@grantforward.com for any difficulties

2

Visit the <u>Contact Us</u> page to submit your technical questions or feedback

3

Go to the <u>Support Home</u> page to access different types of support materials