Researcher Welcome Guide

Welcome to GrantForward!

Researchers can benefit from our complete award-seeking cycle, including a comprehensive database of funding opportunities across all disciplines, a worldwide sponsor directory, and additional sources of pre-solicitations and funded awards. You can also take advantage of many advanced utilities, such as getting funding alerts, receiving grant recommendations based on your research interests, and matching grants delivered from administrators, etc.

In this Researcher Guide, you will learn:

Creating Your Account

Trying a Grant Search

Executing a Search

Chatting with AI Query Assistant

Viewing Search Results

Adding Search Filters

Managing Search Results

Exporting Search Results

Sharing a Search

Saving/Loading a Search

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Exporting a Grant

Adding a Grant to Favorites

Building a Grant List

Sharing a Grant

Excluding a Grant

Internal Grant and Submissions

Checking Out Pre-solicitations, Awards, and Sponsors

Creating Your Researcher Profile

Getting to Know Your Profile

Receiving Grant Recommendations

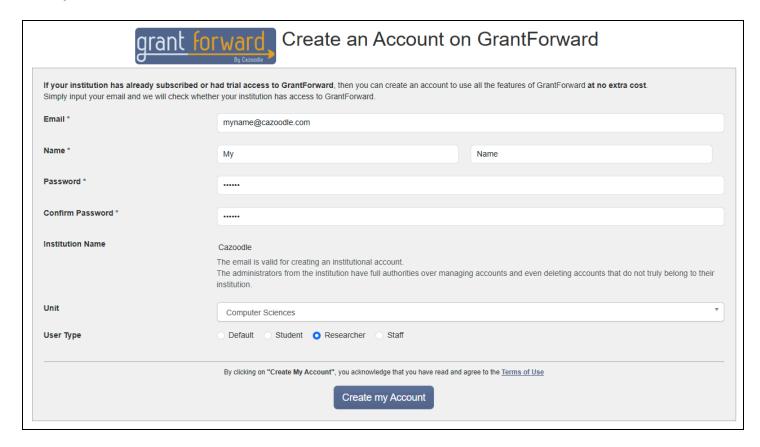
Exploring Your Personalized Homepage

Finding Support

Creating Your Account

To use the search functionality and basic features on GrantForward, you must create your account first. To make your account, just follow these steps:

- 1. Go to GrantForward.com
- 2. Click on **Sign Up** on the upper right side of the GrantForward homepage.
- 3. On the **Create an Account** page, enter your institution's email and the necessary information for your account.



4. 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: <u>Tutorial: How Can I Create an Account?</u>

Trying a Grant Search

Next, you can try out how to search on GrantForward by keywords/phrases and advanced filters to find funding opportunities that match your research topics. Under the **Grants** tab, choose **Search Grant Opportunities.**

Executing a Search

1. Enter keywords/phrases in the input fields of **All**, **Any**, or **None of the Keywords/Phrases** with matching requirements accordingly.

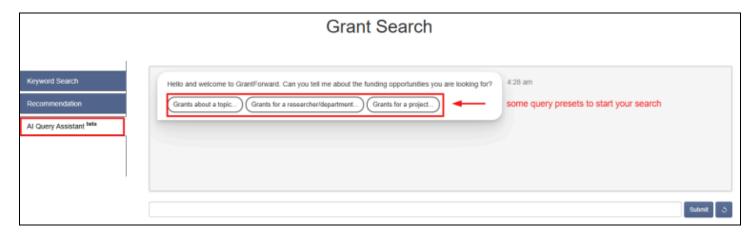
Tip: You can click on the loon to see the explanation for each box.



- 2. Press Enter or click on the **Search** button to execute the search.
- 3. You will see the results quickly pop up for you to shift through. The results, by default, are sorted by **Relevance** to your keywords.

Chatting with AI Query Assistant

- 1. On the Grant Search page, choose Al Query Assistant.
- 2. You can start the conversation with the AI assistant by selecting the query presets.

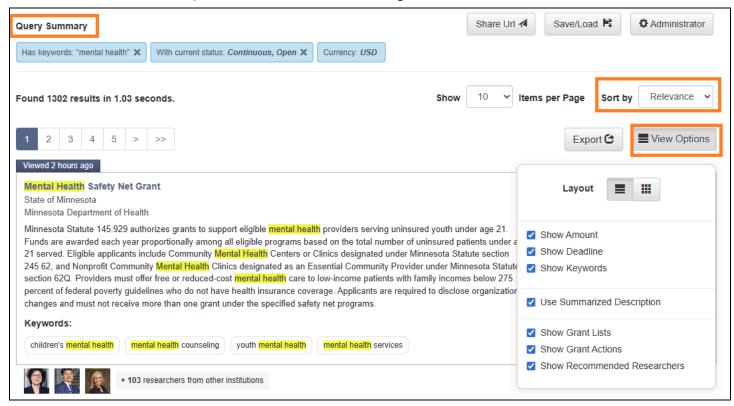


- 3. As you continue the conversation, there will be more prompts for you to choose from and make the assistant help you conduct a good search.
- 4. Besides using the presets, you can also freely enter your conditions in the chat box to find specific funding opportunities with the assistant.

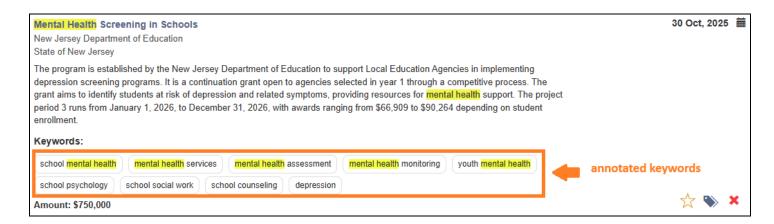
Viewing Search Results

After running a search, you can view and shift 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 also choose **View Options** to select the information you want to show for each grant.



2. The matching keywords in each grant are highlighted, so you can easily scan the results. GrantForward also tags relevant keywords for each grant called "annotated keywords". These annotated keywords help you understand the content of funding opportunities and also help us facilitate matching grants to your search semantically and contextually.



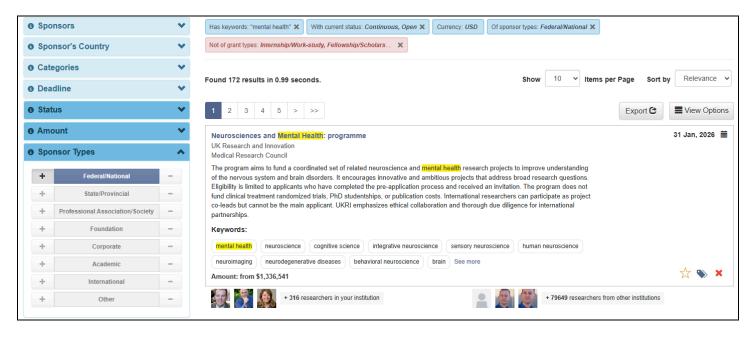
3. Click on the title of a grant to go to the **grant detail page** with more information and links to the opportunity and application pages. You also have the option to flip between the original information and the Summary by AI.



Adding Search Filters

To further narrow down your search results beyond topical relevance (by keywords/phrases), 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 all filters listed on the left side.
- 2. Set the filters to add more criteria for matching your desired grants. E.g., you can select "Federal/ State" in the Sponsors Type to look for funding from government or federal.
- To learn more information about each filter, move your mouse cursor over the icon i.
- After adding any 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.



The search results will automatically be updated with added filters.

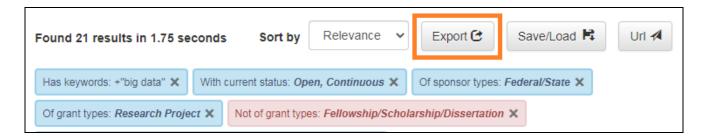
For more guidance, you can view a step-by-step demo: <u>Tutorial: What Advanced Search Filters</u> Can I Use for Searching Grants?

Managing Search Results

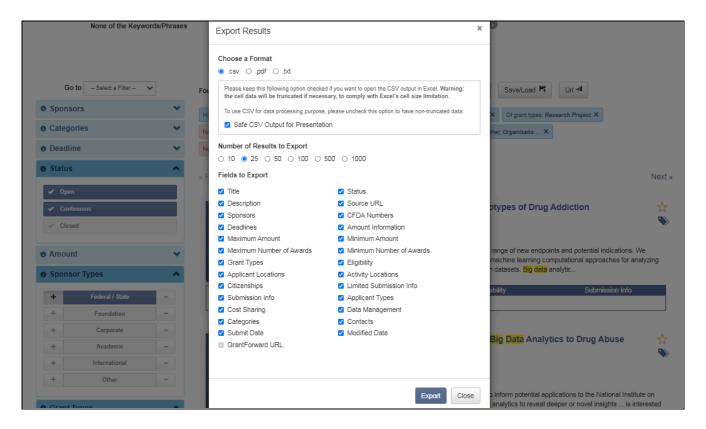
After setting up your search, you can export, share, or save your search to track results and receive grant alerts.

Exporting Search Results

1. To export a list of search results from your search, click on the **Export** button above the search results.

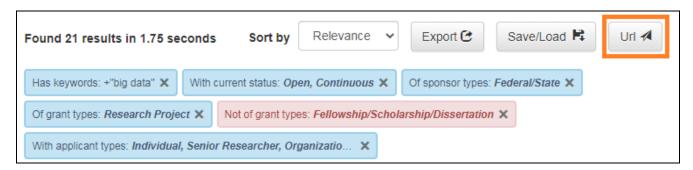


2. In the dialog box, you can select the file format, the number of results, and the fields to export. Then, click **Export** to download the file.

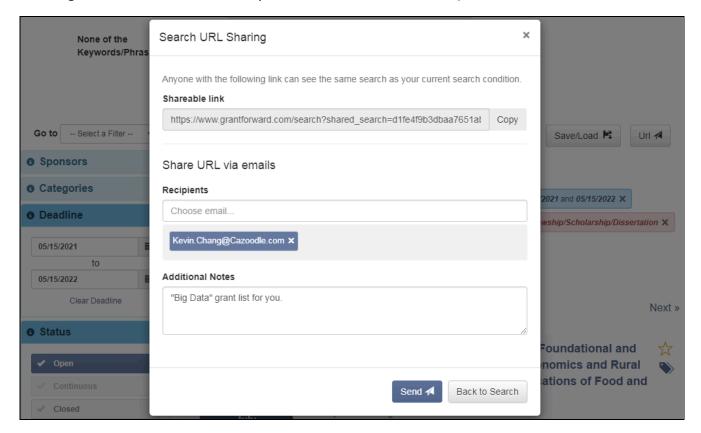


Sharing a Search

1. Share your search under URL format with your friends/colleagues by clicking on the URL button above the search results.



2. You can send the shareable URL directly to your friends/colleagues or send it with additional messages via email, and the recipients will be able to view your search with full conditions.

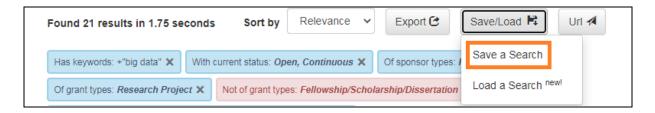


For more guidance, you can view a step-by-step demo: <u>Tutorial: How Can I Share Selected</u> <u>Grants With My Colleagues?</u>

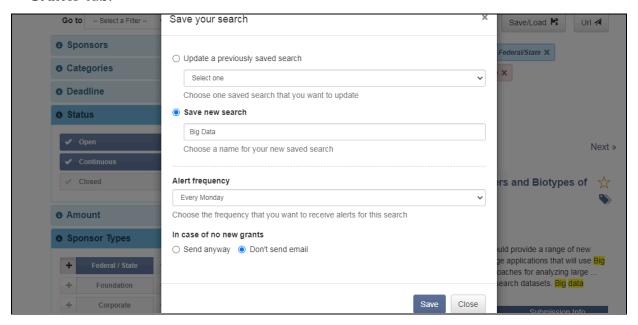
Saving/Loading a Search

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 can now also be loaded directly on the search page or assigned as a default condition.

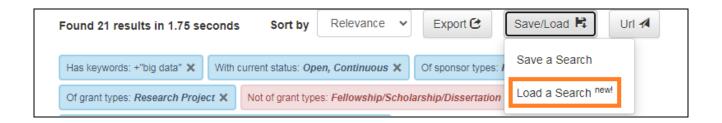
1. To save your search, after setting your search up by keywords/phrases and other filters, click on the **Save/Load** button above the search results, then choose **Save a Search**.



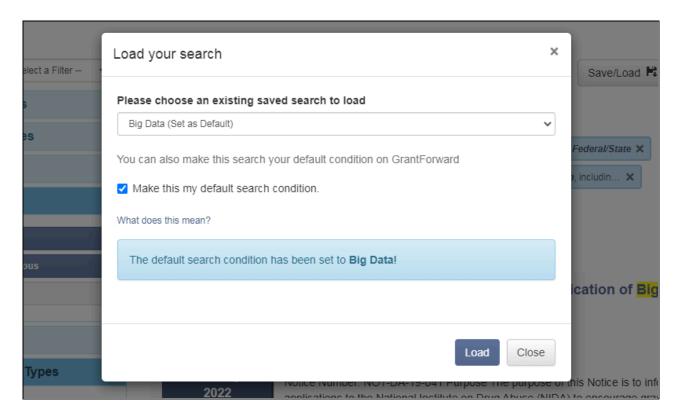
- In the pop-up dialog box, you can choose to update a previously saved search or create a new one. Then set the frequency (daily, weekly, or monthly) for receiving alerts whenever there are new grants updated to the list.
- To view or edit your saved searches, you can find them at the <u>Saved Searches</u> page under the **Grants** tab.



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



• In the pop-up dialog box, you can choose an existing saved search, then the previous search results with full search conditions will be loaded. You can also make this search your default search condition so that it will be displayed whenever you visit the Grant Search page.



For more guidance, you can view a step-by-step demo: <u>UseCase: Monitor and get Alerts for New Grant Opportunities</u>

Managing Grants

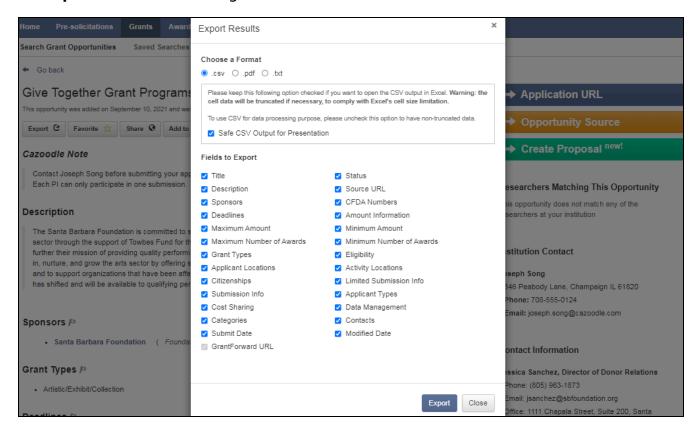
We support many advanced features to help users get better grant management. You can build your lists including the best fit grants and then keep track of them.

Exporting a Grant

- 1. You can export an individual grant by clicking on the title of the desired grant to view the grant detail page.
- 2. Click on the **Export** button under the grant title.



3. In the pop-up dialog box, you can choose the file format and the fields to export. Then, click on **Export** to download the grant.



Adding a Grant to Favorites

- 1. There are two ways allowing you to mark a grant as your favorite to view it later quickly without having to set up the search and find it again.
- You can click on the to button displayed on the right side of the grant title when this grant is shown in the search results.



• You can view a grant detail page and then click on the **Favorite** button to mark it as your favorite.

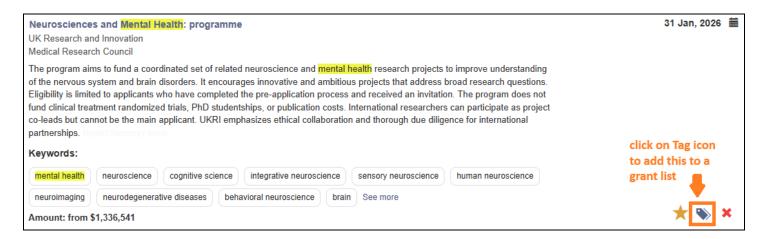


2. You will be able to view all your favorite grants on the <u>Grant Lists</u> page under the **Grants** tab and export that favorite list.



Building a Grant List

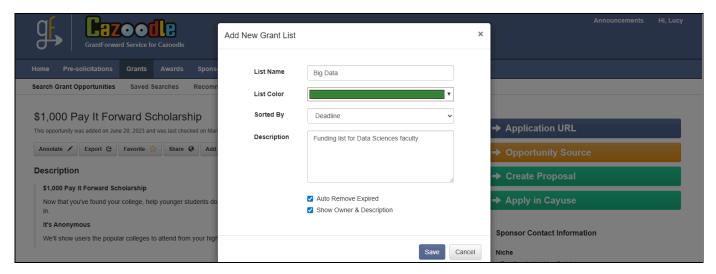
- 1. You can build a list from individual grants in a specific research topic in two ways:
- Click on the button displayed on the right side of the grant title when it is shown in the search results.



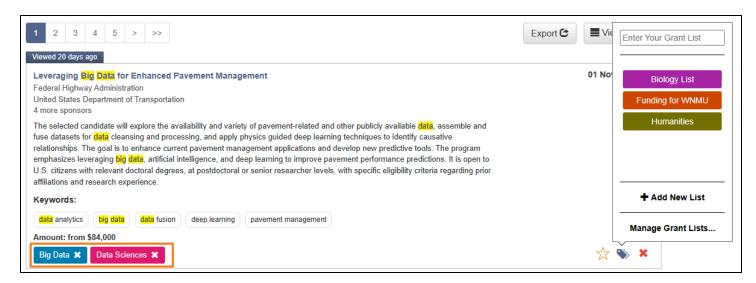
• Or when viewing a grant detail page, you can click on the **Add to List** button.



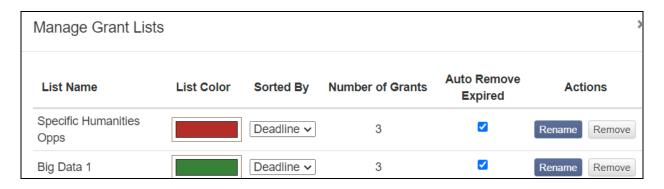
2. In the dialog box, you can choose the name, color, the sort order for the grants in the list, and also describe the list. Click **Auto Remove Expired** to let the system automatically remove grants with overdue deadline. Or choose **Show Owner & Description** if you want to display your name and the list description once you share the list with others.



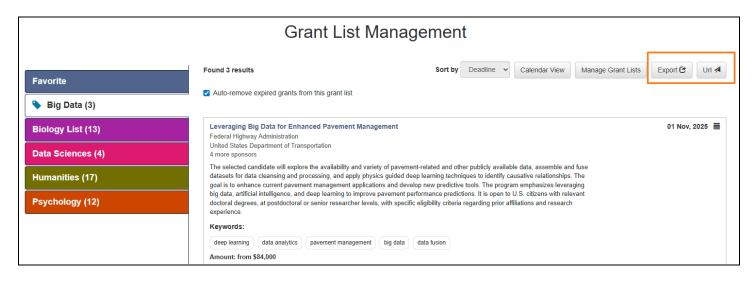
You can add a grant to the available lists that you built before when the grant list is shown. One grant can belong to several lists, and the list tags will be displayed along with that grant for easier recognition. A tag can be easily removed from a grant when you click on its "x".



3. Click on **Manage Grant Lists...** to perform some actions such as changing list color or list name, removing a list, or adding a new list.



4. You will be able to view all your grant lists on the <u>Grant Lists</u> page under the **Grants** tab, as well as export and share those lists using a URL.

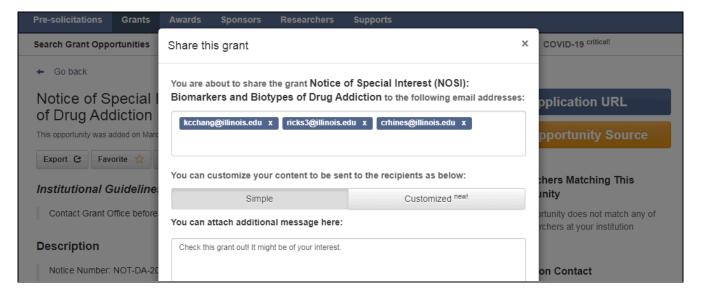


Sharing a Grant

1. You can share an individual grant with your friends/colleagues via email by visiting a grant detail page and clicking on the **Share** button.



2. In the dialog box, enter the email addresses of the recipients that you intend to send to. The content can be customized on your own to have additional messages along with the grant.



3. You can view all the grants that you have shared on the Shared page under the **Grants** tab.

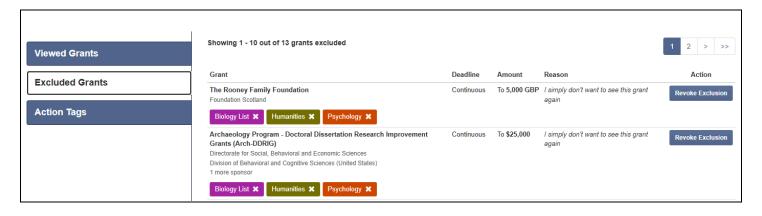


Excluding a Grant

1. When there are some grants from the search results which do not suit your research needs well, you will have the ability to exclude them from the search. To no longer see a grant, you can click on the "x" button under each grant, then choose a reason for the exclusion.



2. You can view all excluded grants at the <u>History</u> page under the **Grants** tab and revoke exclusion at any time. All grants that you have viewed are also displayed there.

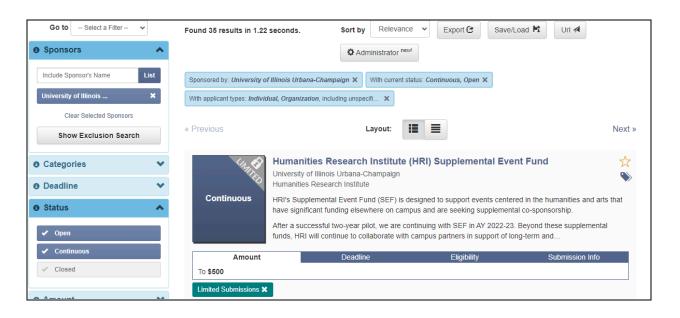


Internal Grant and Submissions

 You can view all funding opportunities having institution-specific annotation provided by your administrators such as internal submission instructions or internal deadlines as well as internal grants within your institution. You can select the potentially eligible grants to submit an application for the internal competition at the <u>Internal Submission</u> page under the **Grants** tab.



- 2. You can use advanced filters to find the best-fit grants and click on the grant title or submit button for more detailed information.
- *Tip*: You can also search for all internal grants by entering your institution's name in the "**Sponsors**" filters.



Checking Out Pre-solicitations, Awards, and Sponsors

Not only grants, but we also provide a comprehensive database of sponsors, pre-solicitations, and awards to create a complete award-seeking cycle to help you get insights into the grant cycle, so you will never miss any grants.

- 1. The <u>Pre-solicitations</u> page offers a database of the notices from sponsors, which provide a heads-up that a solicitation will be released and solicit capability responses from responsible vendors so that you will have sufficient time to prepare better for submitting applications later. You can find to-be-announced grants by keywords/phrases and available filters, as well as receive email notifications for the newest pre-solicitations that match your search setup.
- 2. On the <u>Awards</u> page, you can find who/what institutions were winning grants and what research topics have been funded by using keywords/ phrases and adding various filters. You can also set up email alerts for any new awards that match your search criteria.
- 3. The <u>Sponsor Directory</u> will show you over 20,000 sponsors worldwide on our system which can be searched by name or sponsor type. You can click on any sponsors to see detailed information and their grants on GrantForward.



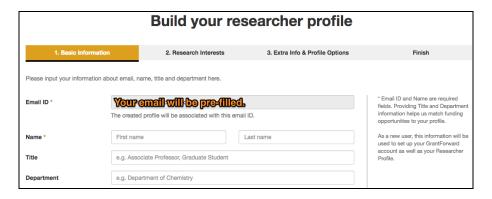
Creating Your Researcher Profile

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.

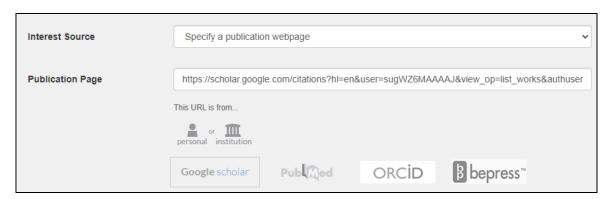
- Under the Researchers tab, click on Create Profiles.
- 2. Select the **Begin Building** button under **Build Your Profile**.



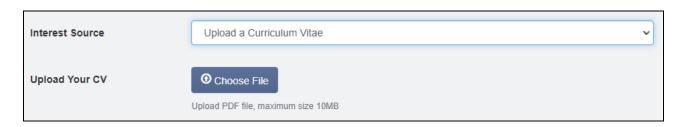
3. The first page asks about your **Basic Information**.



- 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.



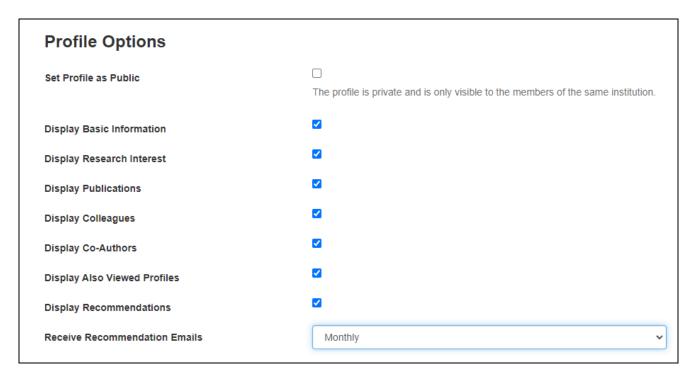
5. In addition to specifying your publications, you can also add **Other Interests** that are not reflected by your publications. Just click on the **Add more interests...** button, and then enter the keyword and move the scrollbar to indicate its importance.



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.



7. Lastly, you can adjust your **Profile Options**-- including profile viewability, what you wish to display on your profile, and-- most importantly-- the frequency (daily, weekly, monthly) of receiving recommendation emails.



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



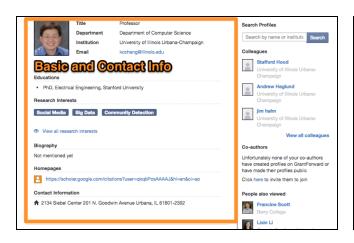
9. When the processing is completed, you can view it by clicking on the **Researchers** tab and choosing **My Profile**. If you wish to edit your profile, you can choose **Edit My Profile**.

For more guidance, you can view a step-by-step demo: <u>Tutorial: How Can I Create a Good</u> 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

GrantForward can recommend relevant funding opportunities based on your research interests automatically, without any effort on your end. You can set up grant recommendations by following the steps below:

- 1. Go to the <u>Recommendations</u> page under the **Grants** tab to set up keywords that GrantFoward can use to recommend opportunities for you:
 - a. Choose **Customize Keyword** to add your interest keywords manually or,
 - b. Click on **Update Keywords from Your Researcher Profile** to import the keywords from your profile directly. (*Note: Make sure you've already created a researcher profile before.*)



2. Choose the recommendation email frequency from the drop-down menu on the upper right.



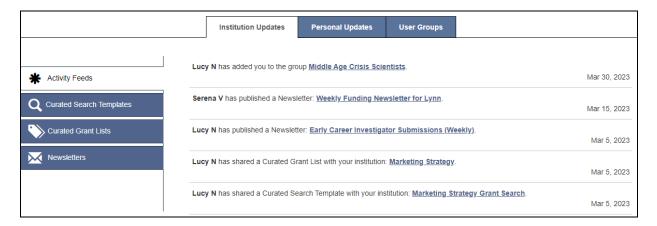
- 3. You can add filters (on the left) to further tailor the recommendations: e.g., if you are a researcher, you may want to exclude some student-oriented grants.
- 4. After finishing the setup, you can receive the recommendations via email, where each grant will have your interest keywords highlighted, or you can go to your Recommendations page on GrantForward.

For more guidance, you can view detailed instructions: <u>Tutorial: How Can I Tailor My Grant</u> Recommendations?

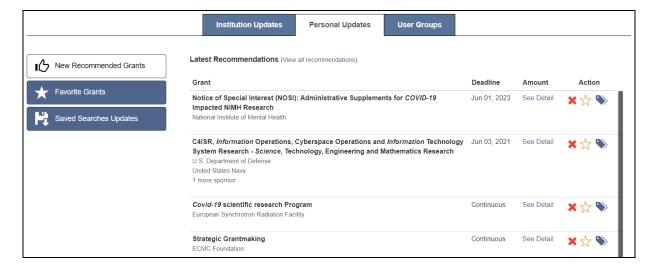
Exploring Your Personalized Homepage

GrantForward provides a personalized homepage to help you quickly see institution updates, personal updates, user groups as well as view GrantForward database updates and connect with potential researchers.

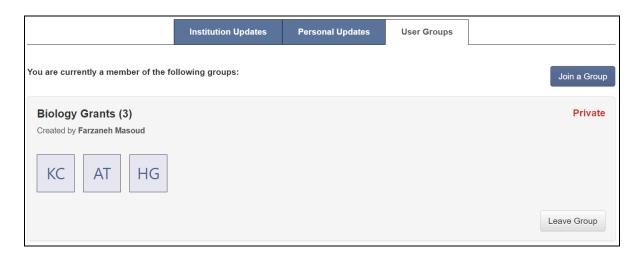
- 1. The Personalized Dashboard will keep your information up to date.
- **Institution Updates** tab shows notifications of what administrators performed, such as changing your unit or permission, adding you to a group, or sharing a search template, a curated grant list, or a newsletter with you. You can also view those lists in this tab.



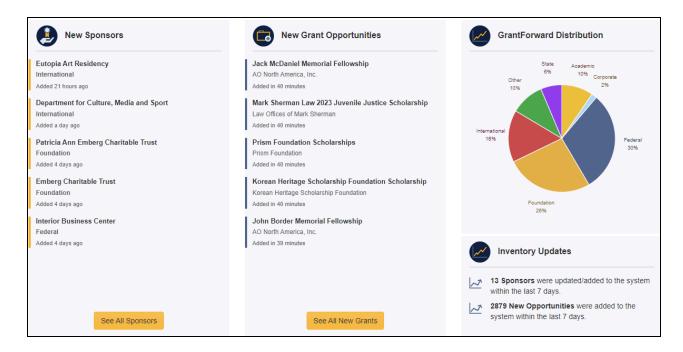
• **Personal Updates** tab displays the latest grant recommendations matching your research interests, updates from your favorite grant list, and new grants added to your saved searches.



• **Users Groups** tab shows all groups that you joined or were added by other administrators. You can also proactively join other groups you are interested in or leave any current groups.



2. GrantForward Database Updates allows you to view new sponsors, grant opportunities as well as the distribution of grants from different sponsor types, and the number of newly added sponsors and grants.



GrantForward displays researchers within your institution and across all institutions so that
you can find potential researchers for collaborations. You can also check the status of your
profile-creating process and take a survey to give feedback on how we can improve our
service.

Finding Support

If you want to find any product resources and materials to help you utilize the platform better, or you want to send questions or feedback directly to the GrantForward team, you can go to the **Supports** page.

- 1. On the **Support Home** page, you can insert keywords in the search box to find support materials on any specific topics or find the most popular features and related documentation to use the platform effectively.
- 2. The **Administrator Support** tab contains materials on administrative functions and marketing tools to promote GrantForward.
- 3. The **Researcher Support** tab includes materials to help regular users with matters about account setup, search function, and other basic features.
- 4. You can watch recorded training webinars for GrantForward users on various topics on the **Webinars** tab.
- 5. On the **Contact** page, you can find our contact information, ask any questions, or share feedback with us at any time.

