



## 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.

**Create an Account on Grant Forward**

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.

**Email**

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**

**Confirm Password**

**Account Type**

**Institution Name**

[Create my Account](#)

- 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:

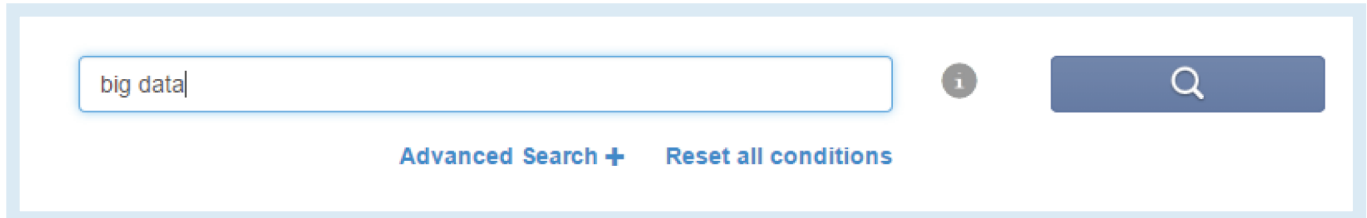
► [Creating An Account Tutorials](#)

## 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**

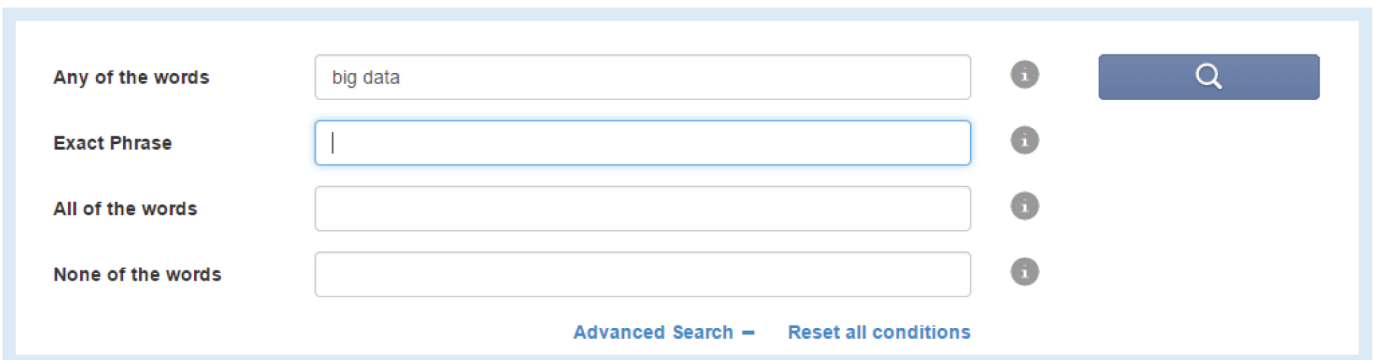
**2** In the keywords box, enter any words relevant to your field of research



big data

Advanced Search + Reset all conditions

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



Any of the words big data

Exact Phrase

All of the words

None of the words

Advanced Search - 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 the following elements:

- Filters (Left Side):**
  - Sponsors:** A search box for "Type sponsor name" and a "List" button.
  - Categories:** A search box for "Type category name" and a "List" button.
  - Deadline:** Two date pickers for "Anytime" to "Anytime".
  - Status:** Three buttons: "Open" (checked), "Continuous" (checked), and "Closed" (unchecked).
- Search Results (Right Side):**
  - Header: "Found 7979 results in 1.15 seconds", "Sort by Relevance", "Export", and "Save search / Alert".
  - Filter: "With current status: Continuous, Open".
  - Navigation: "« Previous" and "Next »".
  - Result 1:** "Radiological/Nuclear Medical Countermeasure Product Development Program (SBIR)(R43/R44)" by National Institutes Of Health. Deadline: "5 April 2015". Description: "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 ...".
  - Result 2:** "Clinical Studies of Safety and Effectiveness of Orphan Products Research Project Grant (R01)" by U.S. Food And Drug Administration. Deadline: "15".

**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.

This close-up shows the filter section with a tooltip:

- Status Filter:** "Open" (checked), "Continuous" (checked), "Closed" (unchecked).
- Sponsor Type Filter:** "Is Federal/State" (checked), "Is Foundation" (checked), "Is Corporate" (checked). A tooltip points to the question mark icon: "Filter the results based on where the funding opportunity is coming from."
- Result Snippet:** Shows a deadline of "15" for "2016" and an "Amount" of "\$20,000 to support excep".

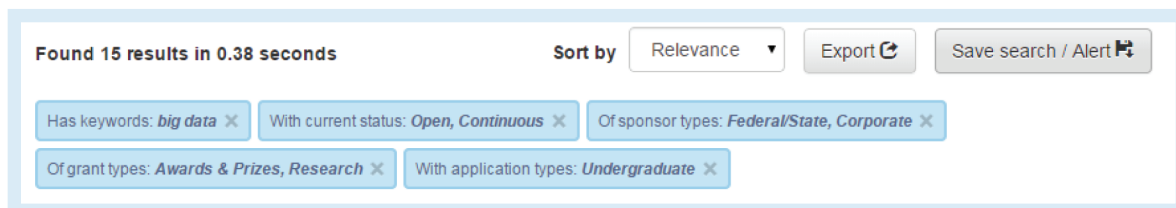
For more information and guidance on using advanced filters for your grant search, you can view a step by step tutorial video and guide for further clarity on our support page:

► [Using Search Filters Tutorials](#)

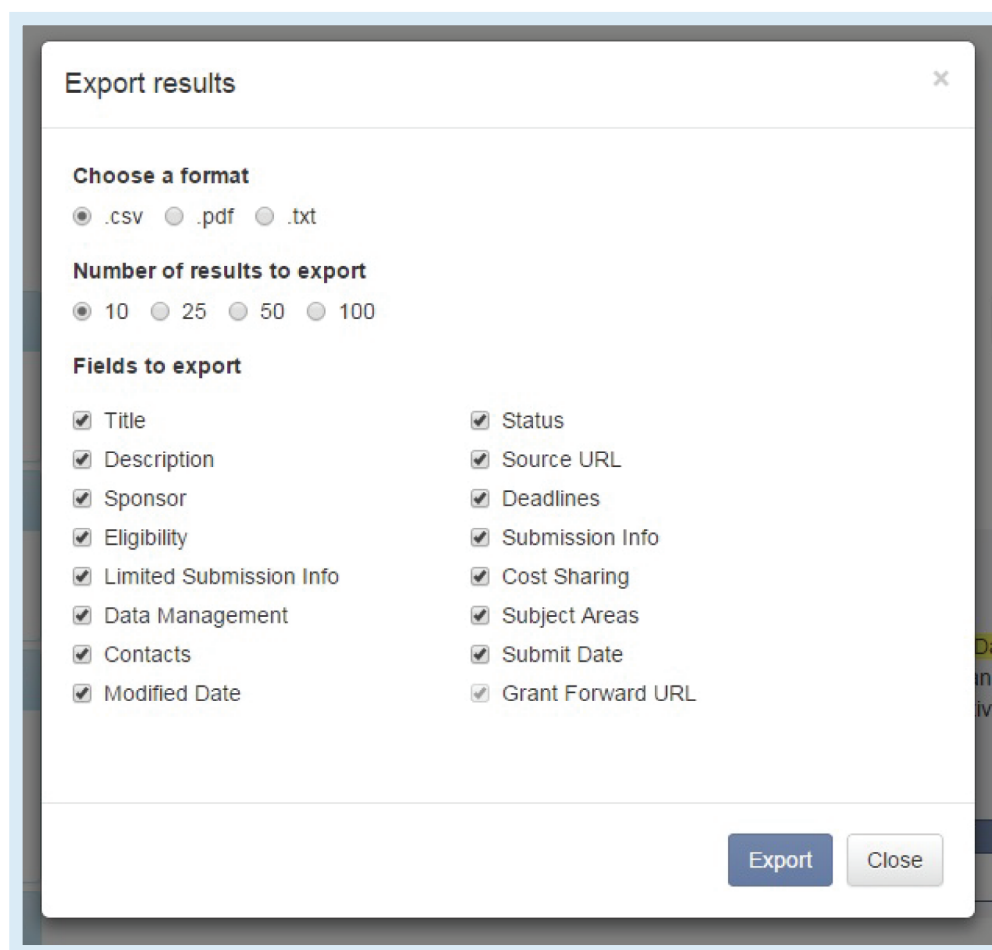
# Exporting Grants

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



**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

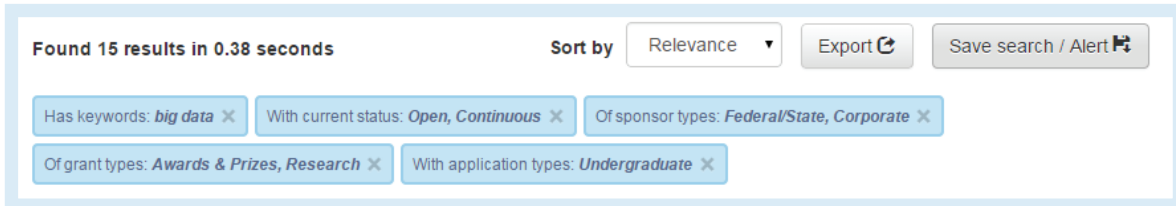


**3** Once you are done configuring your exported list, click **Export** and your file will begin downloading

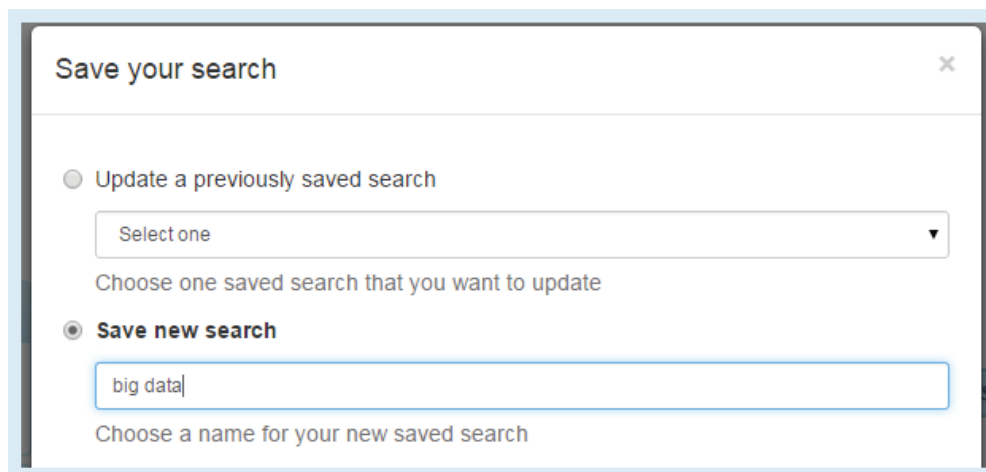
# Saving Your Search for Grant Alerts

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:

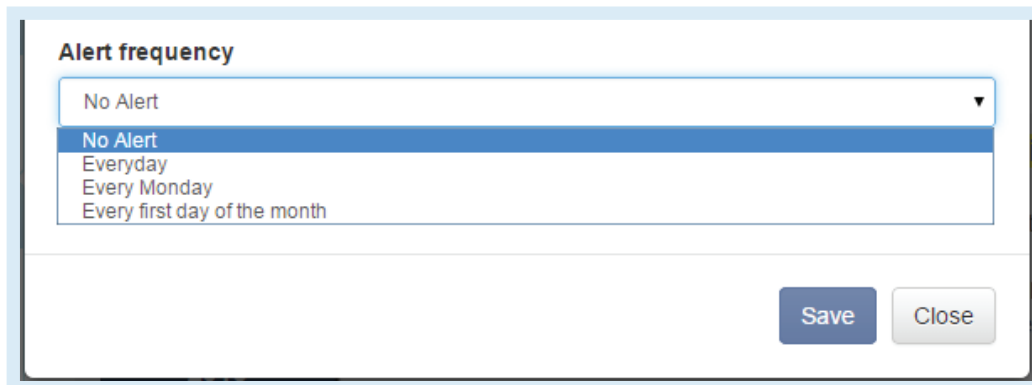
**1** First press the **Save Search/Alert** button above the search results.



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



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



**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:

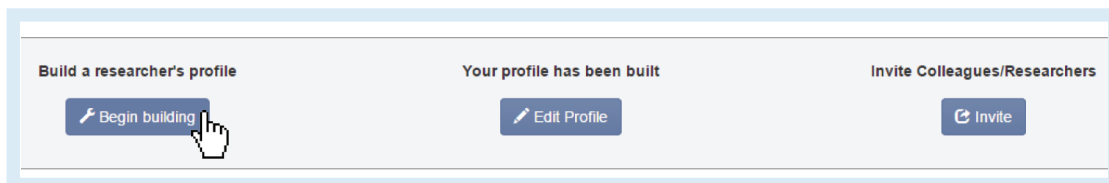
► [Manipulating Search Results Tutorials](#)

# 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



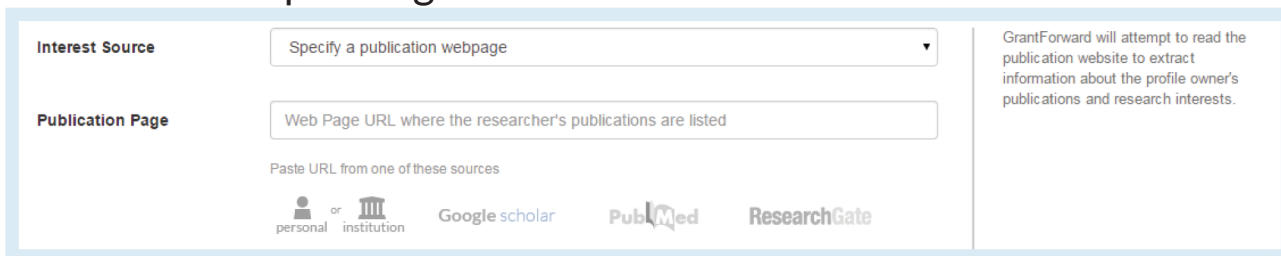
**3** Enter all the basic information on the first page

A form titled '1. Basic Information' with a progress bar at the top showing four steps: '1. Basic Information', '2. Research Interests', '3. Extra Info & Profile Options', and 'Finish'. The form asks for 'Please input email, name, title and department information of the researcher you are creating profile for.' It includes fields for 'Email ID \*' (janeresearcher@illinois.edu), 'Name \*' (Jane, Researcher), 'Title' (Associate Professor), and 'Department' (Chemical Engineering). A note on the right states: '\* Email ID and Name are required fields. Providing Title and Department information helps us match funding opportunities to the researcher's profile.' At the bottom, it says 'Once you have input all valid information, click on the button below to proceed to step 2.' and has a '2. Research Interests' button with a right arrow.

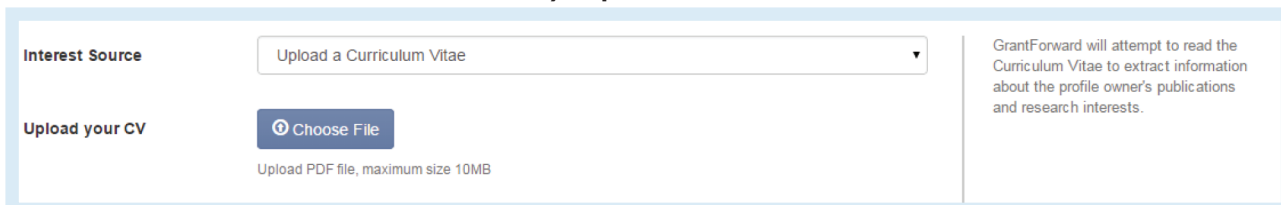
**4** On the next page there are three ways to connect your information to your profile by choosing from the **Interest Source** dropdown

A form titled '2. Research Interests' with a progress bar at the top showing four steps: '1. Basic Information', '2. Research Interests', '3. Extra Info & Profile Options', and 'Finish'. It asks for 'Please choose one method for us to get the researcher's publications / research interests'. A note says: '\* Note: We will only save information associated with your chosen method. If you already had more than one choice, please choose one major source only.' The 'Interest Source' dropdown menu is open, showing options: '-- Please select a method --', 'Specify a publication webpage', 'Upload a Curriculum Vitae', and 'Manually input publications'. Below this, it says 'Additionally, you can specify research interests here' and has a field for 'Other Interests' with 'No interests specified' and an 'Add more interests...' button. A note on the right states: 'GrantForward will need a source of publications provided from the profile owner, to be able to extract information about research interests.' and '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.' At the bottom, it says 'Once you finished specifying publication information, click on the blue button below to proceed to step 3'.

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



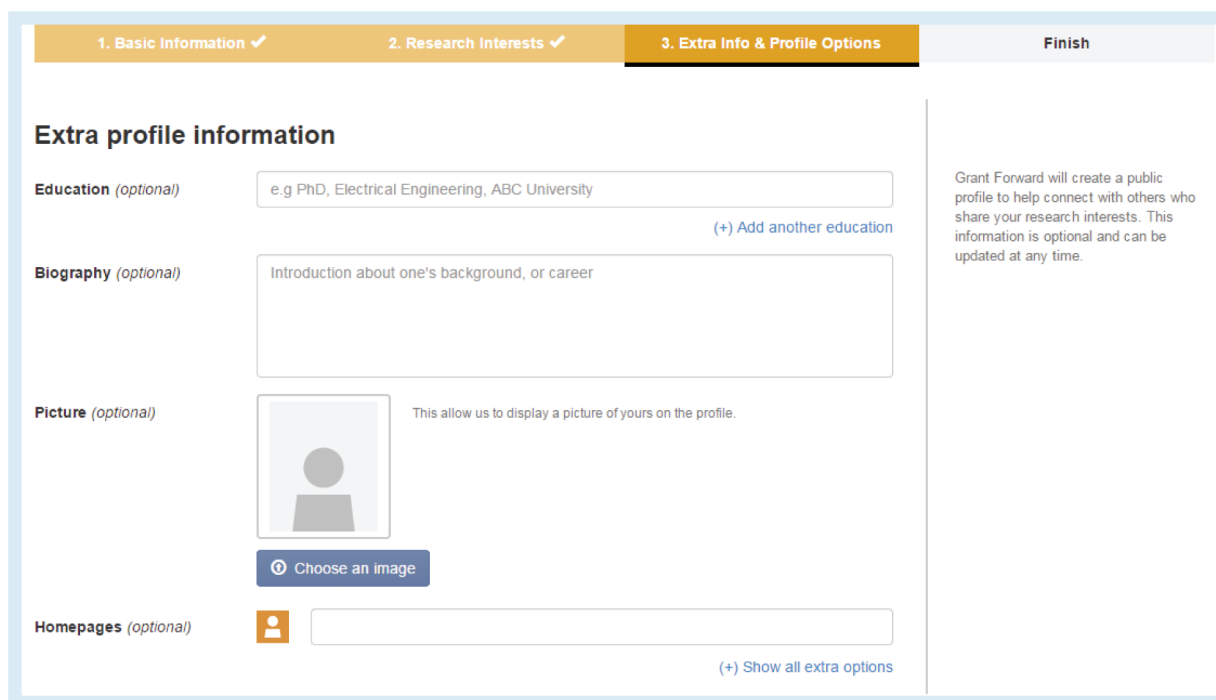
- ▶ You can also upload your current CV to GrantForward and your profile interests will be automatically updated.



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



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





- 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

Receive Recommendation Emails  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.

- 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**

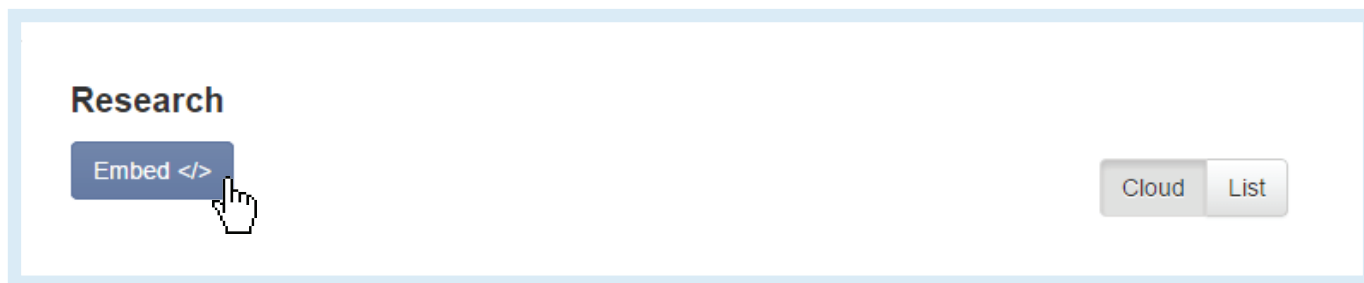
# Getting to Know Your Profile

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 'Edit' section of a researcher's profile. At the top right, there are buttons for 'Edit', 'View Current Cloud', and 'View Current List'. Below this, a note states: 'Uncheck any improper or irrelevant keywords below to make them disappear after finishing editing your profile.' There are three columns of checkboxes for interests: Psychology, Visual Perception, and Media; Cognitive Perception and Art; and Advertising and Creative Theory. Below this, a section titled 'Additionally, you can specify research interests here' contains a list of 'Other Interests' with input boxes and sliders. The interests listed are 'art', 'psychology', 'creative theory', 'media', and 'cognitive perception', each with a 'Low' to 'High' slider. A text box on the right explains: '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 'Recommendations' page for Gabriella Peters. The navigation bar includes 'Search Home', 'Saved Searches', 'Recommendations', 'Favorites', 'Shared<sup>new!</sup>', and 'Sponsors<sup>new!</sup>'. The user's profile is shown with a placeholder image, name 'Gabriella Peters', and title 'Graduate Student Advertising'. A 'View Profile' button is next to the name. In the upper right corner, a 'Recommendation email' toggle is set to 'Yes'. Below the profile, it says 'Your recommendation grants are based on your following profile information' with an 'Edit Profile' button. At the bottom, it says 'Your specified keywords of interest. (view your specified keywords)'.

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**