Researcher Welcome Guide

Welcome to GrantForward!

We will help you through the basics of using GrantForward by going over making accounts, searching for funding opportunities, creating researcher profiles, and receiving grant recommendations. Once you learn the basics of GrantForward, you'll be moving your research forward in no time.

In this Welcome Guide, you will learn:

- ▶ Creating an Account
- ▶ Trying a Keyword Search
- ▶ Viewing Search Results
- ▶ Adding Search Filters
- ▶ Exporting/Favoriting Grants
- ▶ Saving Your Search for Grant Alerts
- ▶ Creating Your Researcher Profile
- ▶ Getting to Know Your Profile
- ▶ Receiving 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   Click on `Sign Up` on the upper right side of the the GrantForward homepage.

2   On the `Create an Account` page, if you will use GrantForward through your institution's subscription, select `Institutional Account` and enter your institution email. Otherwise, select `Individual Account` and use your personal email. Enter a password for your account.

Create an Account on GrantForward

Researcher can choose between **Institutional Account** and **Individual Account**. (learn more)

👤👤👤 Institutional Account	👤 Individual Account

If your institution has already subscribed or had trial access to GrantForward, then you can create an account to use all the features of GrantForward **at no extra cost**. Simply input your email and we will check whether your institution has access to GrantForward.

Email *

Name   First Name   Last Name

Password

Confirm Password

Institution Name   Please enter your email

By clicking on **"Create My Account"**, you acknowledge that you have read and agree to the **Terms of Use**

Create my Account

3   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.
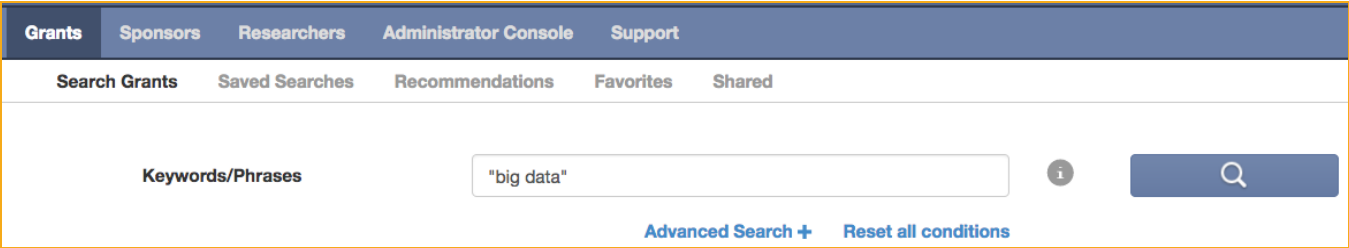
GrantForwardQuickTip
For Researchers

Creating an Account ➔

For more guidance, you can view a step by step demo--
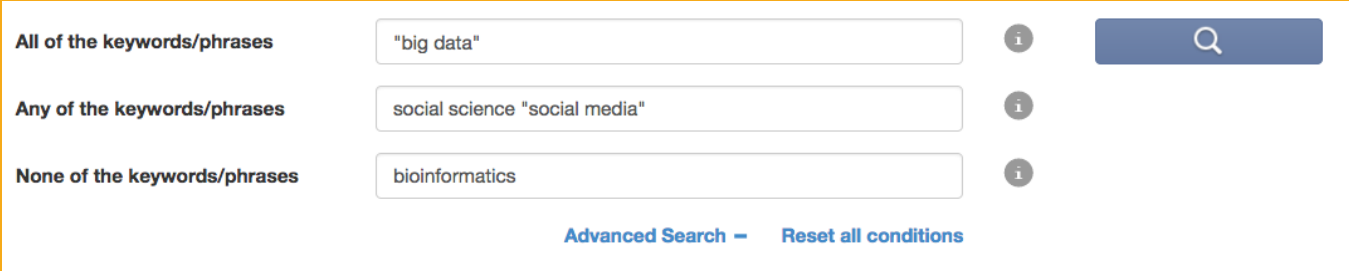**QuickTip: _Creating an Account_**

Trying a Keyword Search

Next, you will try out how to search on GrantForward by keywords to find grant opportunities that match your research topics. Simply follow these steps:

1 Under the `Grants` tab, go to `Search Grants.`

2 In the `Keywords/Phrases` box, enter any words or phrases ("in quotes") relevant to your field of research. Press enter, or click on the search button to execute the search.

Grants	Sponsors	Researchers	Administrator Console	Support

Search Grants	Saved Searches	Recommendations	Favorites	Shared

Keywords/Phrases   "big data"   ⓘ   🔍

Advanced Search **+**   Reset all conditions

3 You will see the results quickly pop up for you to sift through. The results, by default, are sorted by `Relevance` to your keywords.

4 You can refine your search by selecting `Advanced Search` to enter keywords/phrases in the input fields of `All`, `Any`, or `None of the keywords/phrases`, which will require them to match accordingly.

All of the keywords/phrases   "big data"   ⓘ   🔍

Any of the keywords/phrases   social science "social media"   ⓘ

None of the keywords/phrases   bioinformatics   ⓘ

Advanced Search **–**   Reset all conditions

GrantForwardQuickTip
For Researchers

Trying a Keyword Search →

For more guidance, you can view a step by step demo--
QuickTip: _Trying a Keyword Search_

After running a search, you can view and sift 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 navigate to the `Next` or `Previous` page of results.
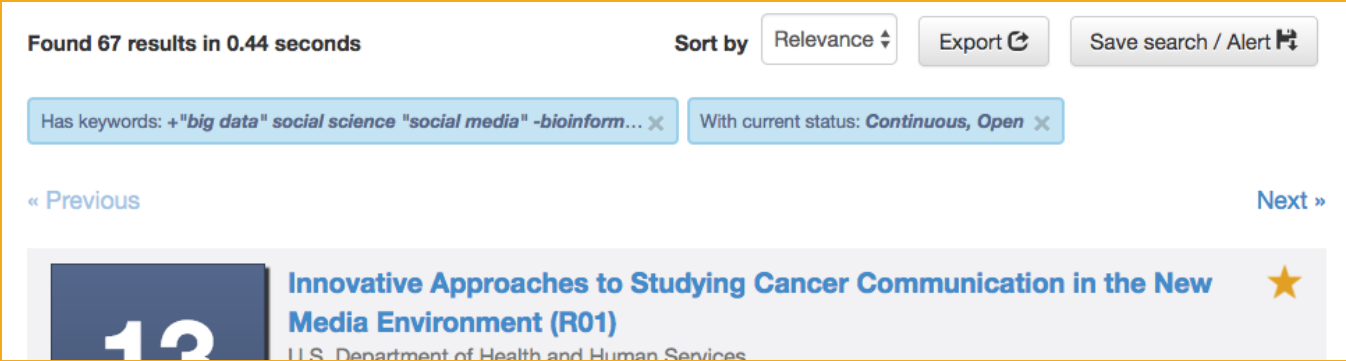
2 Browse each result, which lists the deadlines, title, sponsors, excerpt of its description, etc. The matching keywords are highlighted so you can quickly determine if the grant match well what you are looking for.
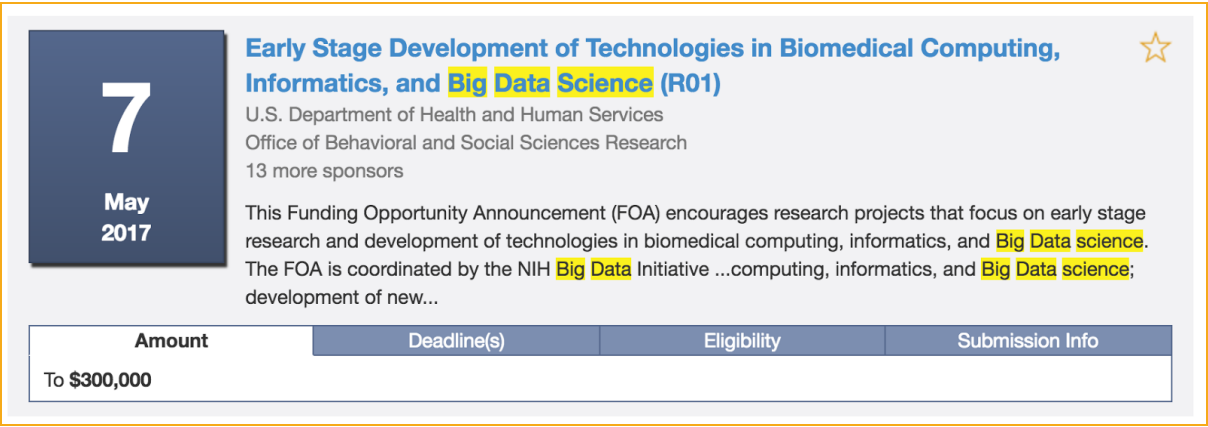

3 Click on the title of a grant to go to the **grant detail page** with more information. From here, you can also visit the `Opportunity Source` where the grant was found.
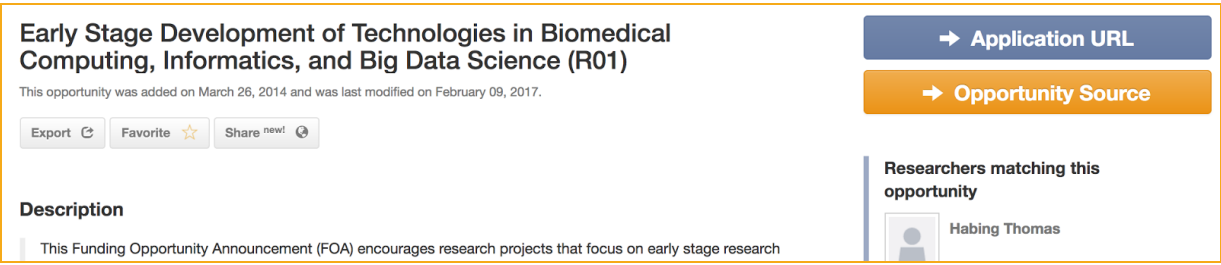
Adding Search Filters

To further narrow down your search results beyond topical relevance (by keywords), you can add more search filters -- including `Sponsors`, `Deadline`, `Amount`, `Sponsor Type`, `Grant Type`, etc.

1 On the `Search Grants` page, you will see filters on the left side.

2 Set the filters to add additional criteria for matching your desired grants. E.g., you can set `Deadline` to focus on a certain period and `Grant Type` to exclude certain types that are not applicable to you.

- To learn more information about each filter, move your mouse cursor over the info icon **i**.
- As you add 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.
- As you add filters, the search results will automatically update.
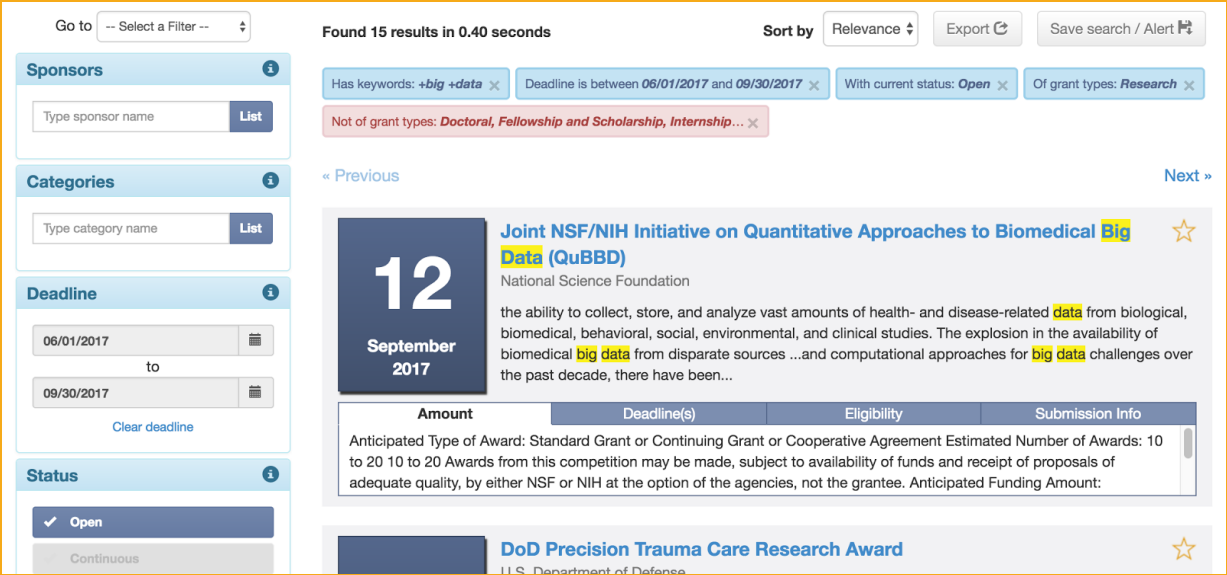
For more guidance, you can view detailed instructions--
CaseStudy: *How Can I Search for Grants Using Advanced Search Filters?*

Exporting/Favoriting Grants

For future reference, sharing, or keeping track of your selected grants, you can export or favorite them.

1 To **export search results**, click on the `Export` button. To **export an individual grant**, visit its detail page, and click `Export` at the top.
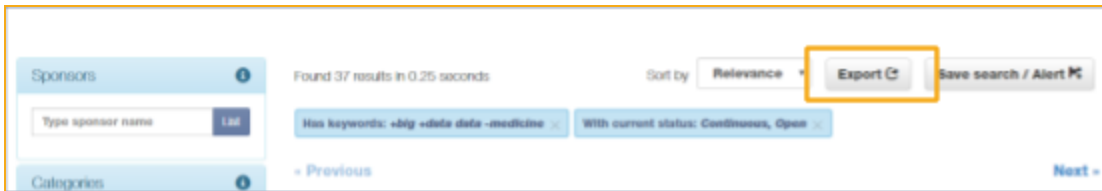
In the dialog box, select the file format, the number of results, and the fields to export. Then, click `Export` to download the file.
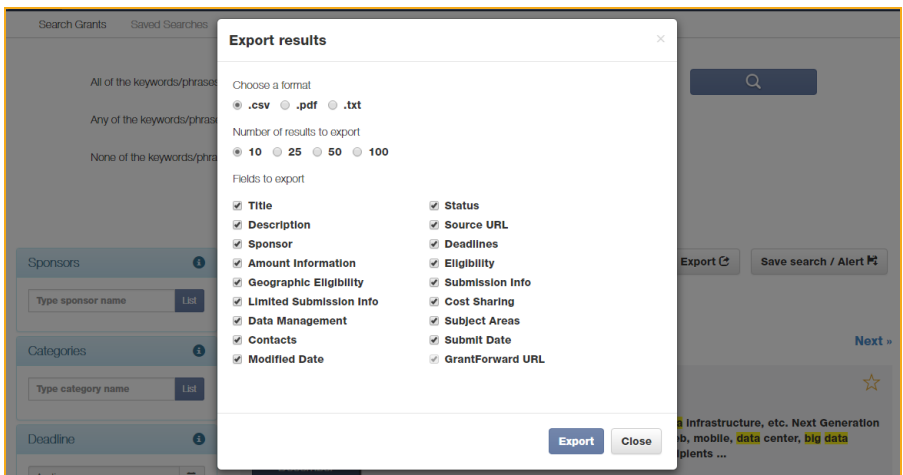
2 You can **favorite a grant** for quick access. Just click on the ☆ button. You can view all favorited grants at `Favorites` under the `Grants` tab.

For more guidance, you can view a step by step demo--
QuickTip: *Exporting Grants*

For more guidance, you can view detailed instructions--
CaseStudy: *What Can I Do with Exported Grants?*

After setting up a search that finds grants you like, you can save it to come back to it later and get email alerts of new funding opportunities that become available in future-- so that you can monitor new grants. To save your search:

1 Click on the **Save search/Alert** button above the search results.

2 In the pop-up dialog box, check if you want to either update a previously saved search, or create one. Set the frequency (monthly, weekly, or daily) for receiving alerts of new matching grants.
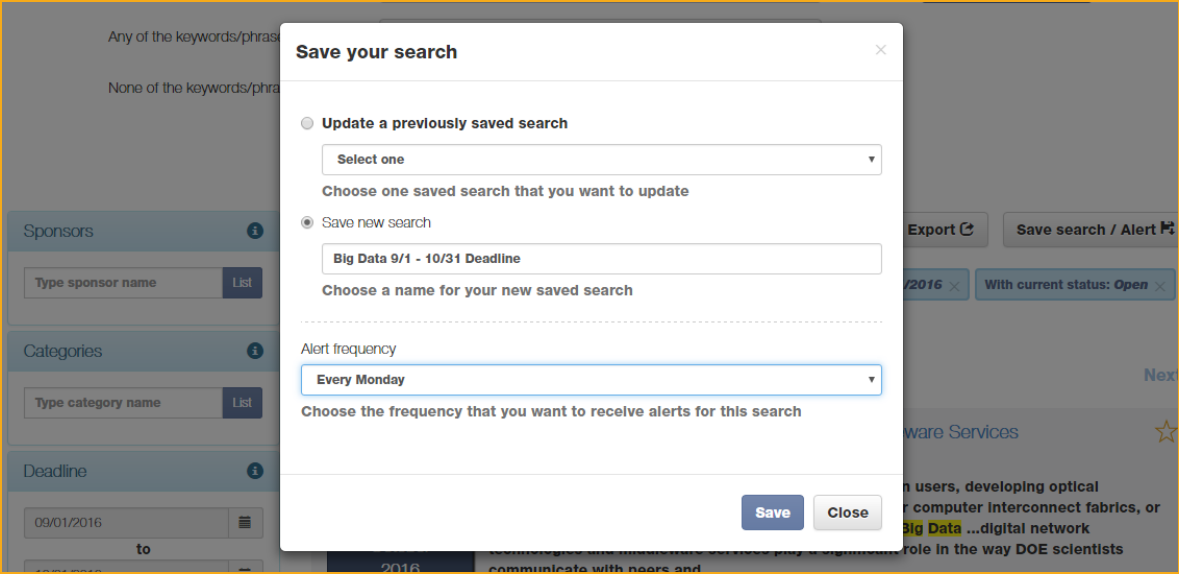
3 To view and edit your saved searches, you can find them at **Saved Searches** under the **Grants** tab.

GrantForwardQuickTip
For Researchers

Saving Your Search

For more guidance, you can view a step by step demo--
QuickTip: *Saving Your Search*
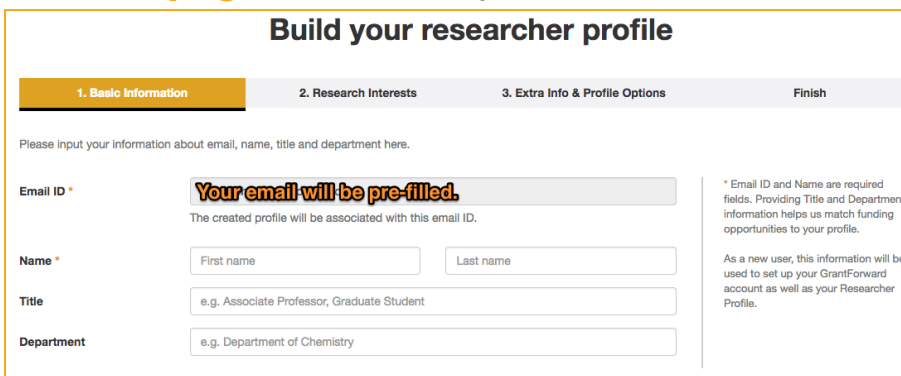
Creating Your Researcher Profile

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 tailor to your research interests.

1   Under the **Researchers** tab, click on **Create Profiles**.

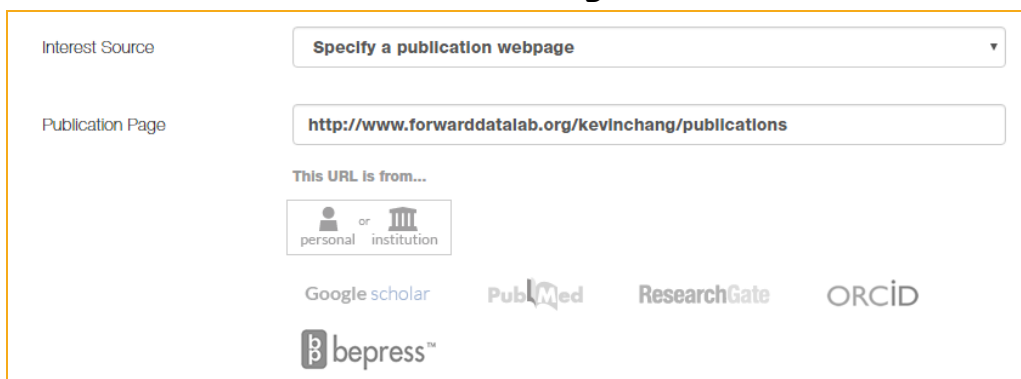**2**   Select the **Begin building** button under **Build your profile**.

Build a researcher's profile	Build your profile
🔧 Begin building	🔧 Begin building
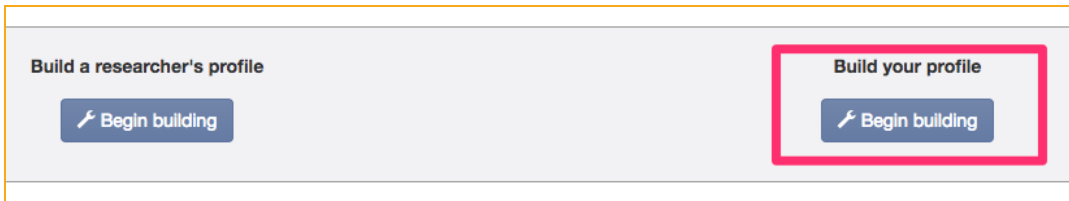
3   **The first page** asks about your **Basic Information**.

Build your researcher profile

1. Basic Information	2. Research Interests	3. Extra Info & Profile Options	Finish

Please input your information about email, name, title and department here.

Email ID *   Your email will be pre-filled.
The created profile will be associated with this email ID.

Name *   First name   Last name

Title   e.g. Associate Professor, Graduate Student

Department   e.g. Department of Chemistry

* Email ID and Name are required fields. Providing Title and Department information helps us match funding opportunities to your profile.

As a new user, this information will be used to set up your GrantForward account as well as your Researcher Profile.

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 web page, enter the URL into the **Publication Page** box.

Interest Source	Specify a publication webpage ▾
Publication Page	http://www.forwarddatalab.org/kevinchang/publications

This URL is from...

👤 personal   or   🏛 institution

Google scholar   PubMed   ResearchGate   ORCID

bepress™

- 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 as `Interest Source`, you can also add `Other Interests` that are not reflected by your publications. Just click on `Add more interests`, and then enter the keywords 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 info, a photo, and links to your homepages.

7 Lastly, you can adjust your `Profile Options`: Privacy setting, what you wish to display on your profile, and-- most importantly-- the frequency (e.g., weekly) of receiving grant recommendations.

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 choose `My Profile`. If you wish to edit your profile, you can choose `Edit My Profile`.

GrantForward CaseStudy:
For Researchers
How Can I Create a Good Researcher Profile?

Your researcher profile is important. It captures your research interests, which then determine what grants will be recommended to you! It also presents information about your research, so your colleagues and other researchers can find you to collaborate.

For more guidance, you can view detailed instructions--
CaseStudy: *How Can I Create a Good Researcher Profile?*

Now that you have a Researcher Profile, you can explore your profile. To start using your profile:

1 Go to **My Profile** 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:
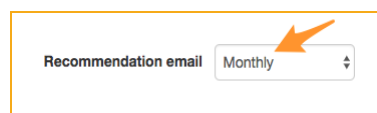
Receiving Grant Recommendations

With a Researcher Profile created, you can receive grant recommendations based on your research interests, at GrantForward or via emails. To view your recommended grants and set up email notifications:

1 Go to **Recommendations** under the **Grants** tab, which lists the grants recommended to you based on your research interests keywords.

2 You can add filters to further tailor the recommendations: e.g., if you are a researcher, you may want to exclude some student-oriented grants.
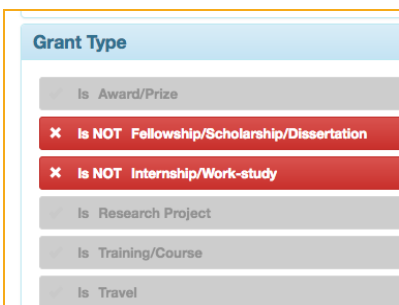
3 You can set the frequency grant recommendation emails.

You will receive emails with recommendations, where each grant will have your interest keywords highlighted.

(upper right) of

GrantForward CaseStudy:
For Researchers
How Can I Tailor My Grant Recommendations?

After creating a Researcher Profile, you can make sure that the grant recommendations you are receiving are matching your research needs by tailoring your recommendation settings.

For more guidance, you can view detailed instructions--
CaseStudy: *How Can I Tailor My Grant Recommendations?*