grant forward

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.
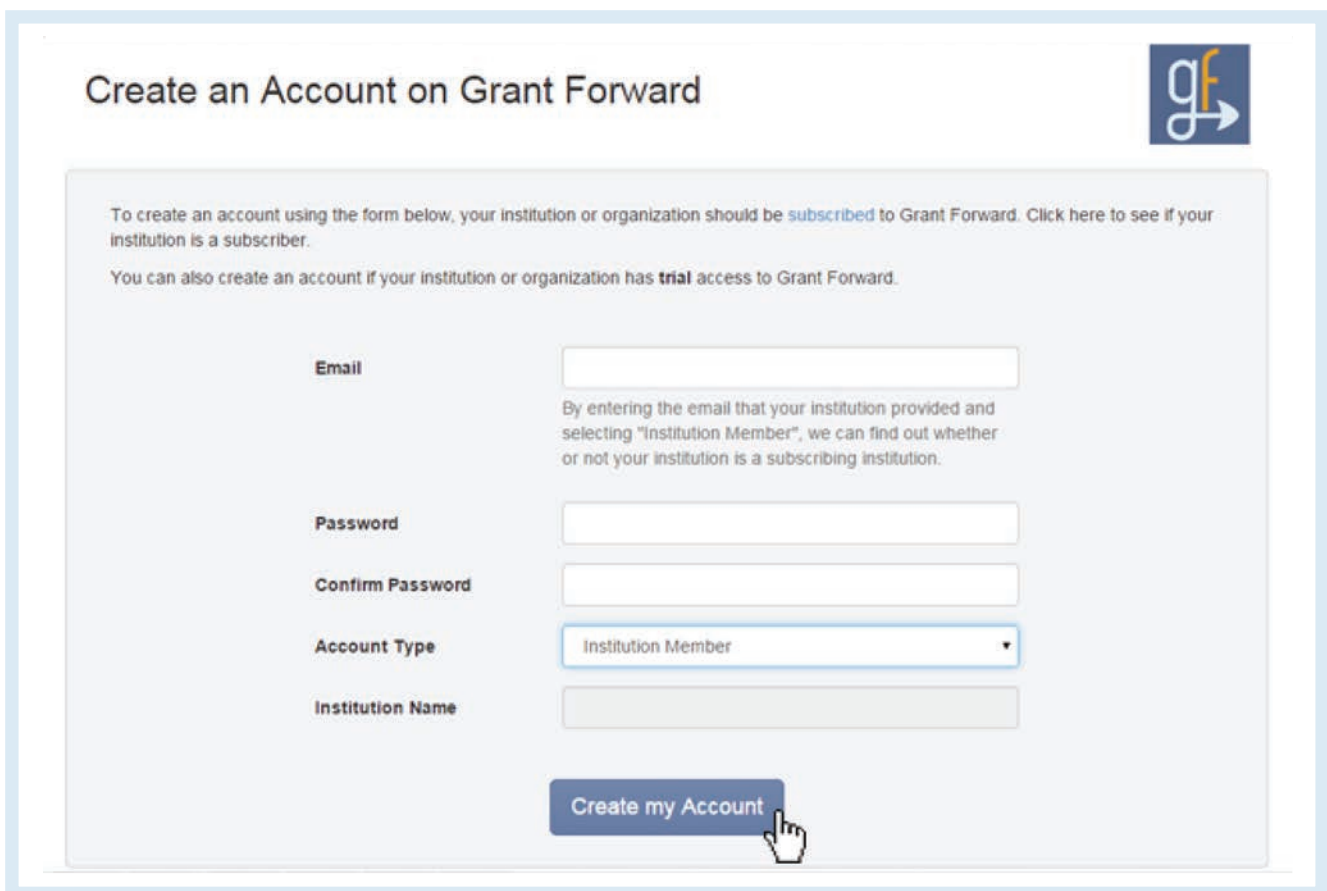
In this Welcome Guide we will cover:

- 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.

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:
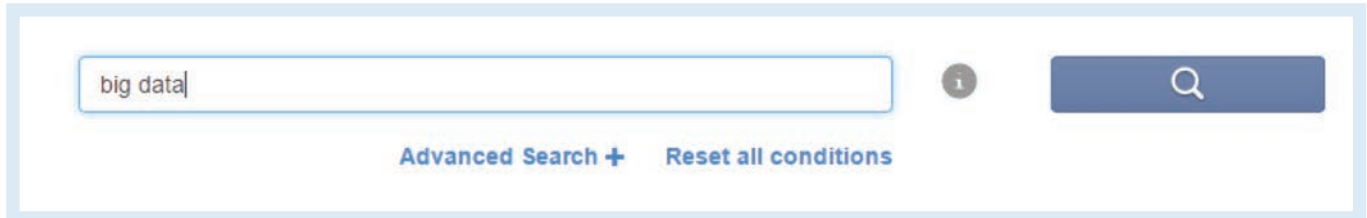▶ **Creating An Account Tutorials**

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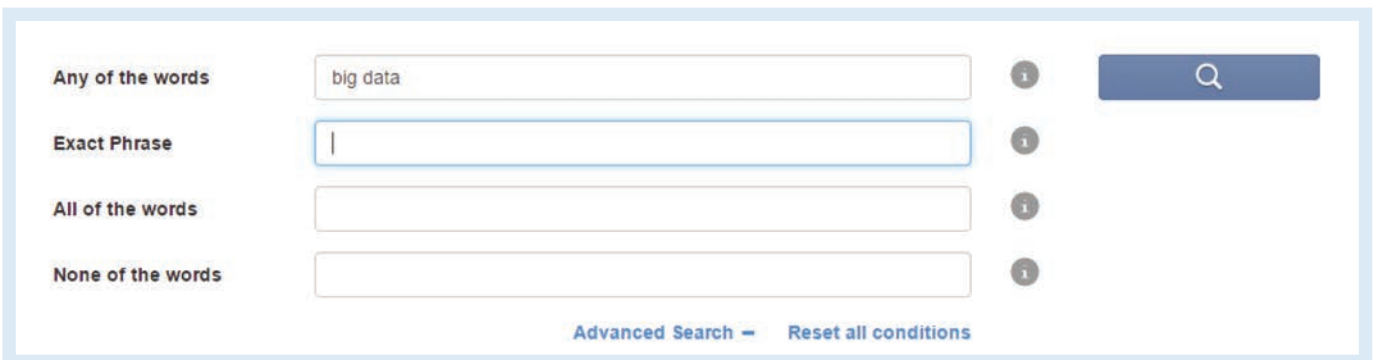
1 Under the **Search** tab, go to **Search Home**

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

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

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
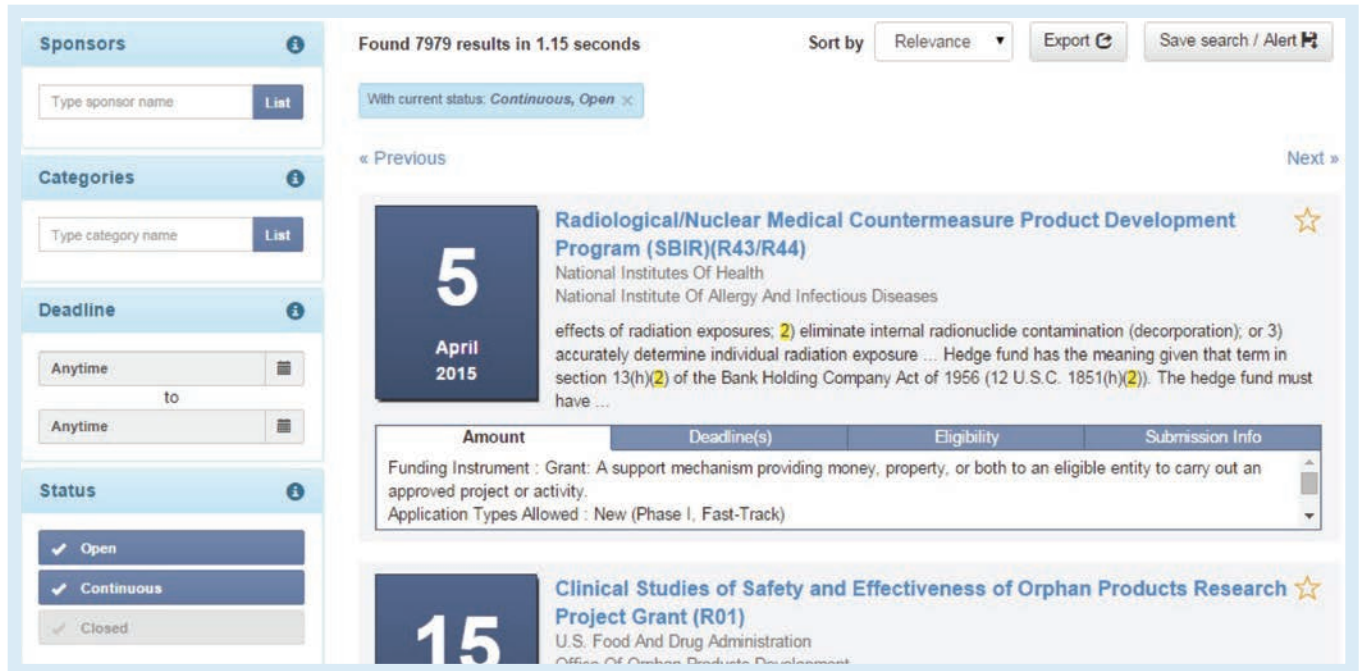
2 By entering information or selecting criteria from the set options, the results for your search will automatically update. If you want more information about a filter, press the question mark icon next to the name.
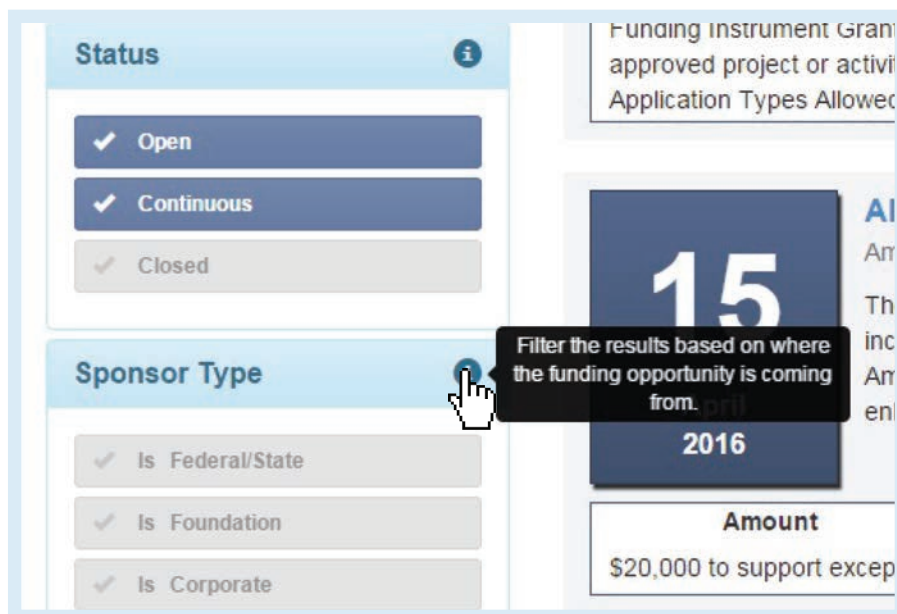
For more information and guidance on using advanced filters for your grant search, you can view a step by step tutorial video and guide for further clarity on our support page:

▶ **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

☑ Title   ☑ Status

☑ Description   ☑ Source URL

☑ Sponsor   ☑ Deadlines

☑ Eligibility   ☑ Submission Info

☑ Limited Submission Info   ☑ Cost Sharing

☑ Data Management   ☑ Subject Areas

☑ Contacts   ☑ Submit Date

☑ Modified Date   ☑ 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.

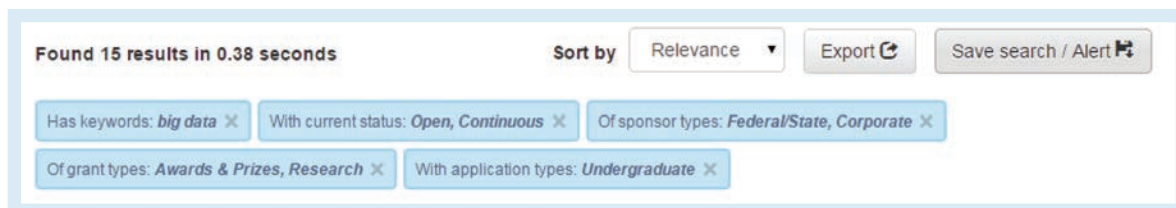**For more information and guidance on saving your search, you can view a step by step tutorial video and guide for further clarity on our support page:**
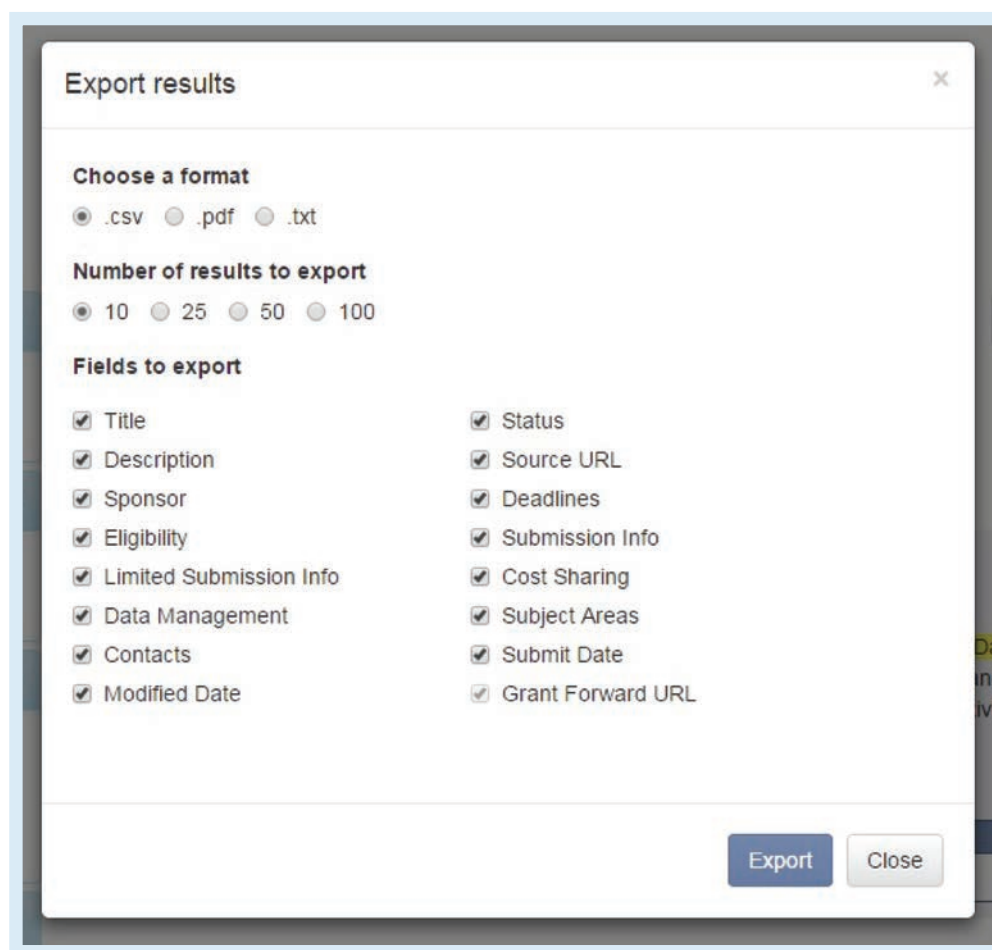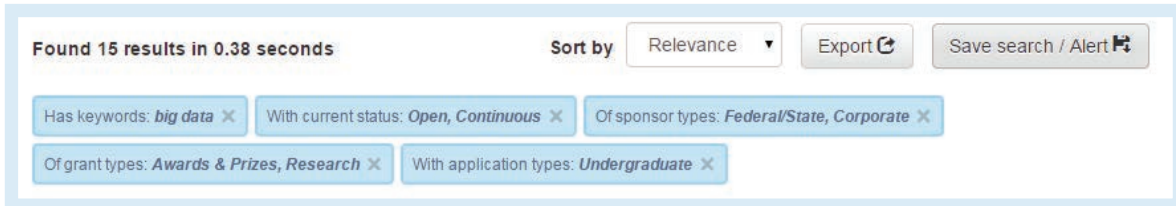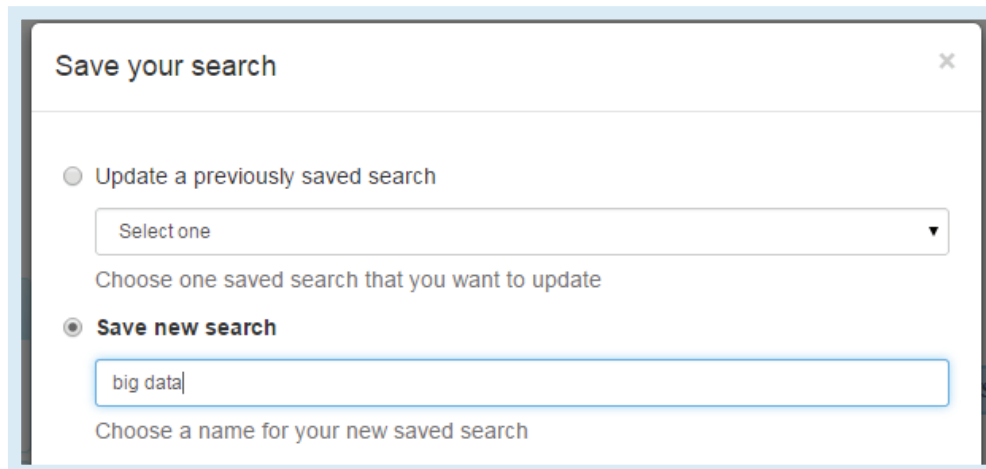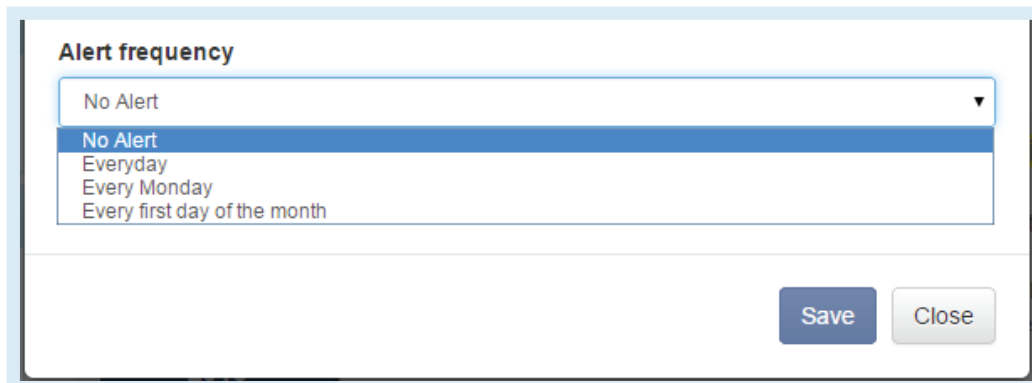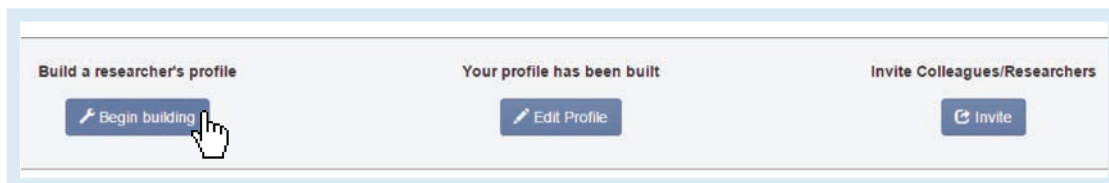
▶ **Manipulating Search Results Tutorials**

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

Build a researcher's profile	Your profile has been built	Invite Colleagues/Researchers
🔧 Begin building	✏️ Edit Profile	↪ Invite

3   Enter all the basic information on the first page

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

Please input email, name, title and department information of the researcher you are creating profile for.

Email ID *	janeresearcher@illinois.edu	* Email ID and Name are required fields. Providing Title and Department information helps us match funding opportunities to the researcher's profile.
Name *	Jane Researcher	
Title	Associate Professor	
Department	Chemical Engineering	

Once you have input all valid information, click on the button below to proceed to step 2.
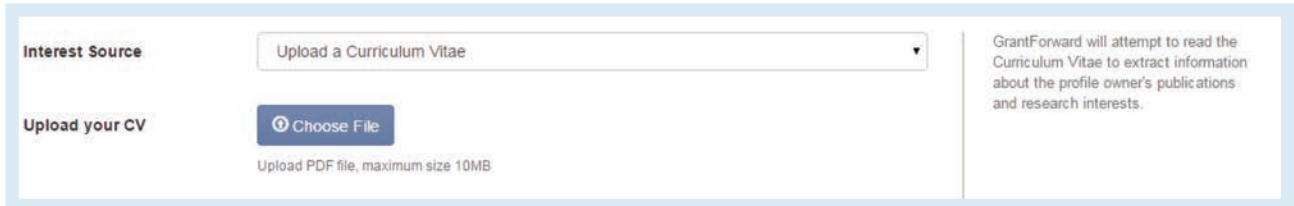
2. Research Interests ➡

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

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

Please choose one method for us to get the researcher's publications / research interests

* 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.*

Interest Source	-- Please select a method -- ▼	GrantForward will need a source of publications provided from the profile owner, to be able to extract information about research interests.
	-- Please select a method --	
	Specify a publication webpage	
	Upload a Curriculum Vitae	
	Manually input publications	

Additionally, you can specify research interests here

Other Interests	No interests specified	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.
	➕ Add more interests...	

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.

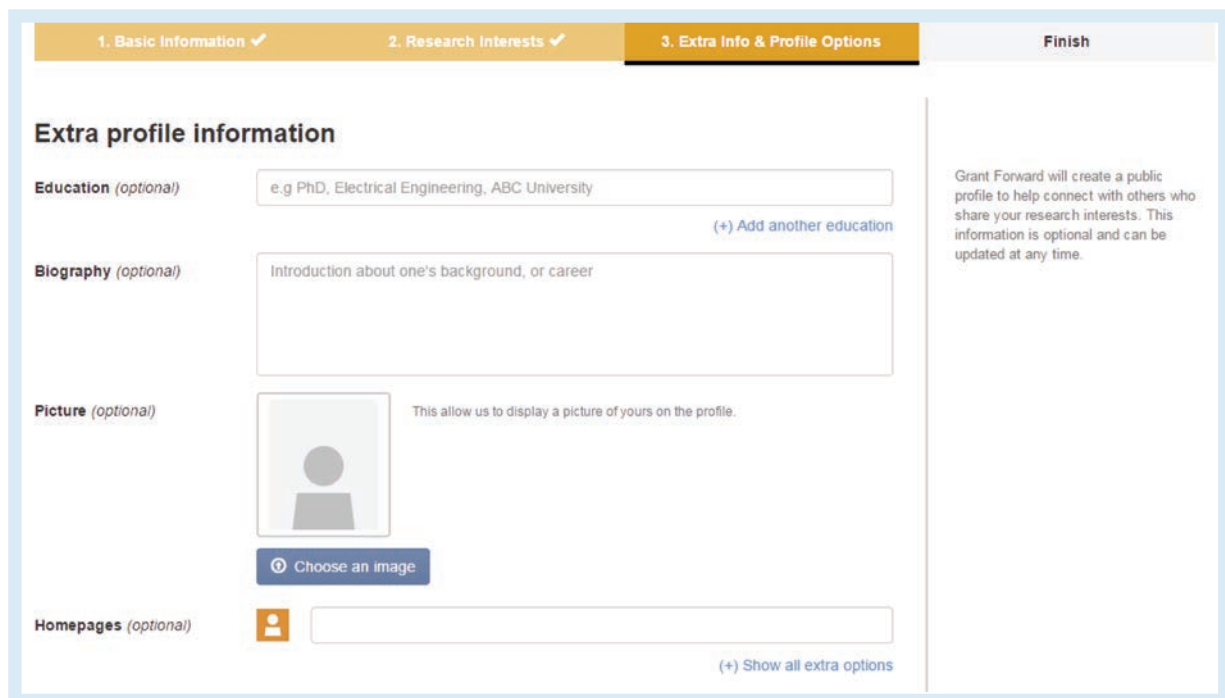| Interest Source	Specify a publication webpage ▾	GrantForward will attempt to read the publication website to extract information about the profile owner's publications and research interests.
Publication Page	Web Page URL where the researcher's publications are listed	
	Paste URL from one of these sources	
	👤 or 🏛 personal institution Google scholar Pub[M]ed ResearchGate	

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

Interest Source	Upload a Curriculum Vitae ▾	GrantForward will attempt to read the Curriculum Vitae to extract information about the profile owner's publications and research interests.
Upload your CV	ⓘ Choose File	
	Upload PDF file, maximum size 10MB	

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

Interest Source	Manually input publications ▾	GrantForward will attempt to read the publications information specified on the textbox to extract information about the profile owner's publications and research interests. * Tip: Try to seperate publications by a new line for generally better extracting result.
Publication Titles	e.g. M. Phillips, "Reducing the cost of Bluetooth systems", Electronics & Communication Engineering Journal, vol. 13, no. 5, pp. 204-208, Oct. 2001	

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

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

Extra profile information

Education *(optional)*	e.g PhD, Electrical Engineering, ABC University	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.
	(+) Add another education	
Biography *(optional)*	Introduction about one's background, or career	
Picture *(optional)*	👤 This allow us to display a picture of yours on the profile. ⓘ Choose an image	
Homepages *(optional)*	👤	
	(+) Show all extra options	

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.

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**

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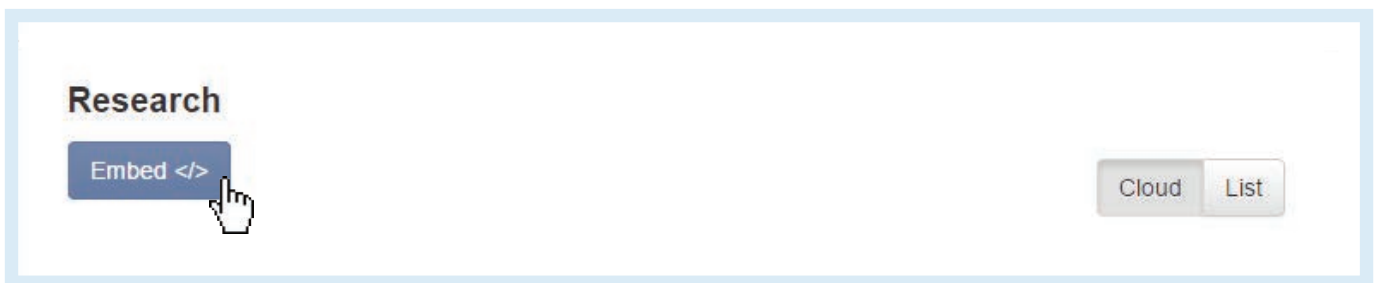
4 Additionally, you can use your researcher profile as your research homepage that integrates all your essential information and research. GrantFoward provides an easy to remember URL to make sharing your research page easy.

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 notifcations:

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.

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

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**