

Creating an Account

- 1 Click on **Sign Up** on the upper right side of the the GrantForward homepage.
- 2 On the Create an Account page, you will use GrantForward through our institution's subscription, and will enter your RIT email address.
- 3 Check your inbox for a **confirmation** email. Confirm by clicking on the link in the email. Then, you can log in to use GrantForward via the Log In button on the upper right side of the screen.

The screenshot shows a web form titled "Create an Account on GrantForward". At the top, there is a note: "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." The form fields are: Email (text input), Name (split into First Name and Last Name text inputs), Password (text input), Confirm Password (text input), Institution Name (text input with a placeholder "Please enter your email"), and Department (text input). Below these fields are radio buttons for "User Type": "Default" (which is selected), "Student", and "Researcher". At the bottom right of the form is a blue button labeled "Create my Account".

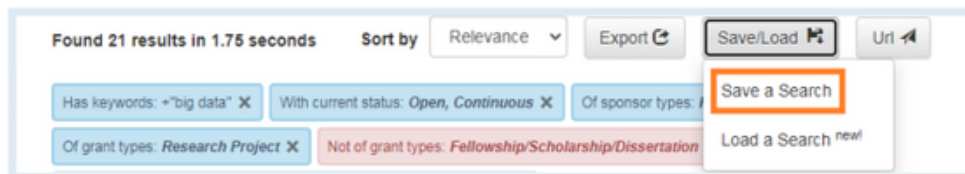
Searching for Funding

- 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. Click on the **search** button or press enter.
- 3 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.
- 4 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.
 - 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.
- 5 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 matches what you are looking for.
- 6 Click on the **title** of a grant to go to the grant detail page with more information.

Saving Your Search for Grant Alerts

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.

- 1 Click on the **Save/Load** button above the search results and then choose **Save a Search**.



- 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.

Receiving Automatic Grant Recommendations

With a Researcher Profile created, you can receive grant recommendations based on your research interests via email.

- 1 Under the **Researchers** tab, click on **Create Profiles** and select the **Begin Building** button under **Build Your Profile**.
- 2 The first page asks about your **Basic Information**. 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.
 - You can also upload your CV PDF (which contains publications)
 - Or, you can manually copy-and-paste your publication citation text.You can also add Other Interests that are not reflected by your publications by clicking Add More Interests, and then enter the keywords and move the scrollbar to indicate its importance. The third page asks about **Extra Info & Profile Options**.
- 3 Now your GrantForward Researcher Profile is complete! The system will take a few minutes to complete building your profile. When the processing is completed, you can view it by clicking on the **Researchers** tab and choose **My Profile**.
- 4 To set up the emails, go to **Recommendations** under the **Grants** tab, which lists the grants recommended to you based on your research interests keywords. You can add filters to further tailor the recommendations and then set frequency of grant recommendation emails in the upper right corner.