



# 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](#)

- 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.

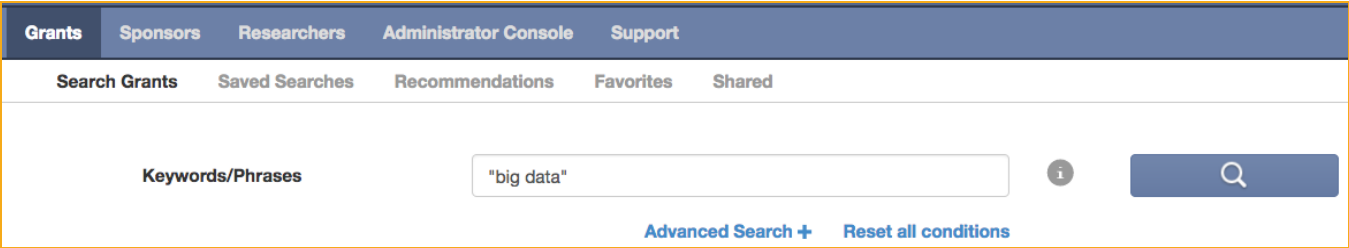


For more guidance, you can view a step by step demo--  
**QuickTip: Creating an Account**

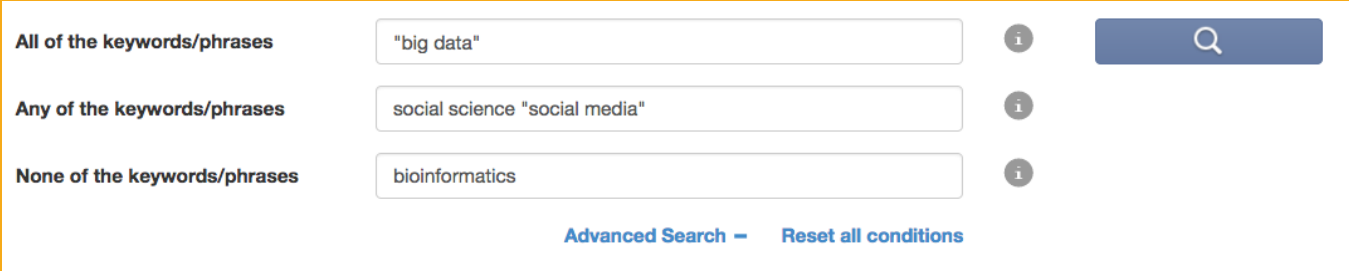
# Trying a Keyword Search

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.



- 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.

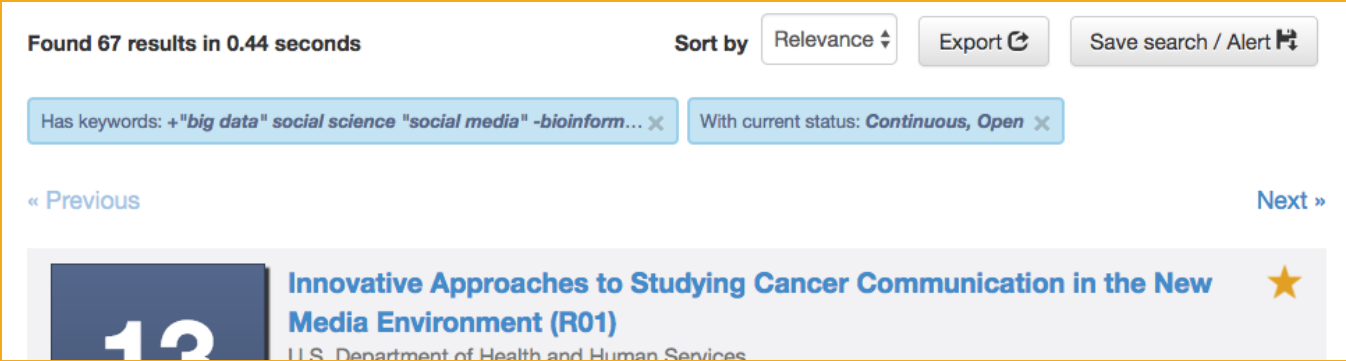


For more guidance, you can view a step by step demo--  
**[QuickTip: Trying a Keyword Search](#)**

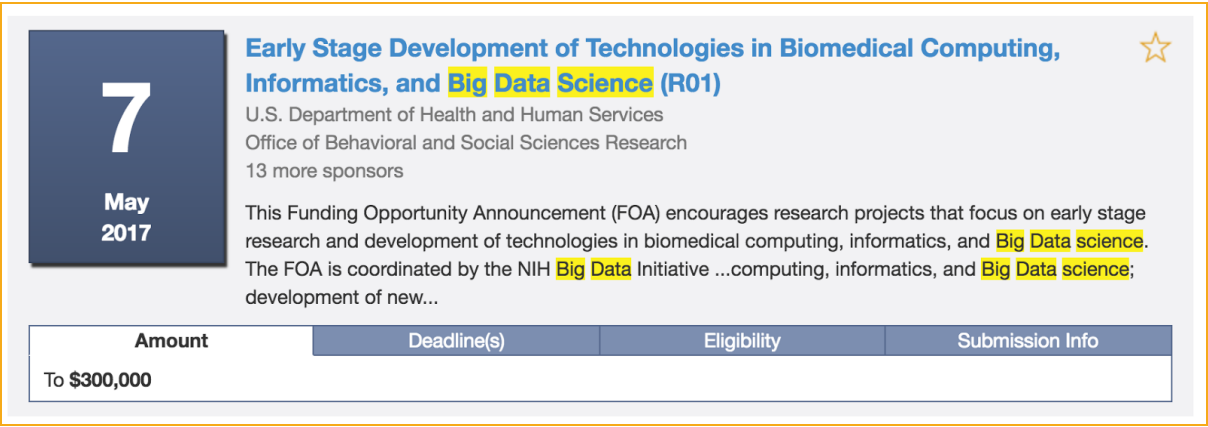
# Viewing Search Results

After running a search, you can view and sift through the results.

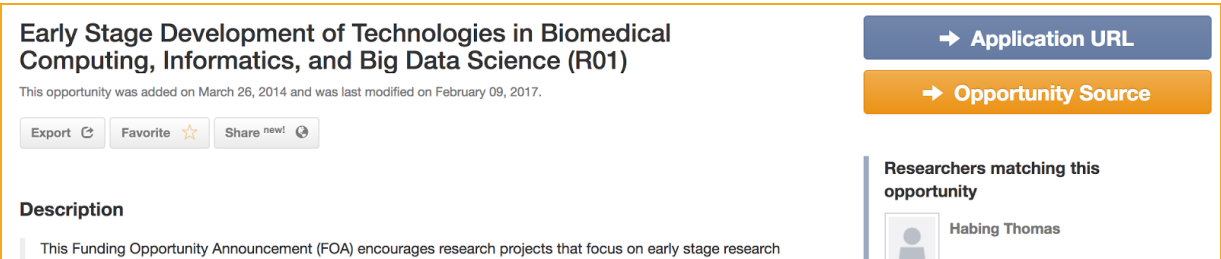
**1** At the top of the results, you can see the summary of the search conditions. You can sort the results by **Relevance**, **Deadline**, or other properties. You can navigate to the **Next** or **Previous** page of results.



**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.



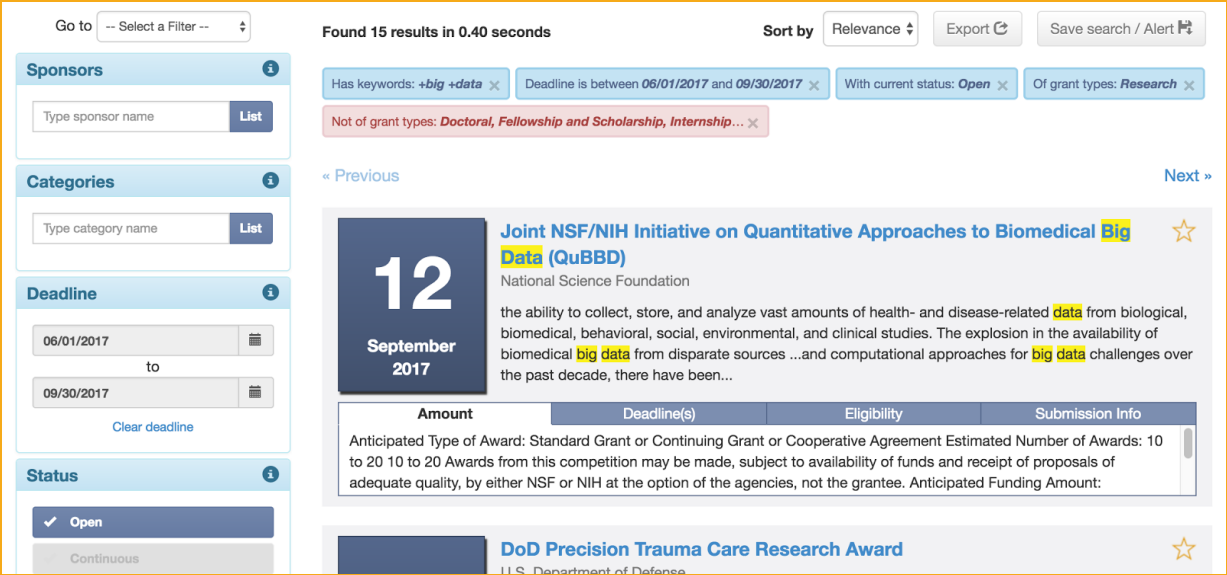
**3** Click on the title of a grant to go to the **grant detail page** with more information. From here, you can also visit the **Opportunity Source** where the grant was found.



# 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.



**GrantForward CaseStudy**  
For Researchers

How Can I Search for Grants Using Advanced Search Filters?

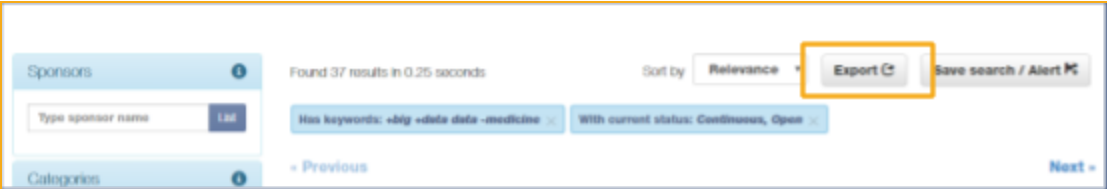
You can refine your search results beyond topical relevance, by adding advanced search filters (either on top of keywords or not).

For more guidance, you can view detailed instructions--  
**[CaseStudy: How Can I Search for Grants Using Advanced Search Filters?](#)**

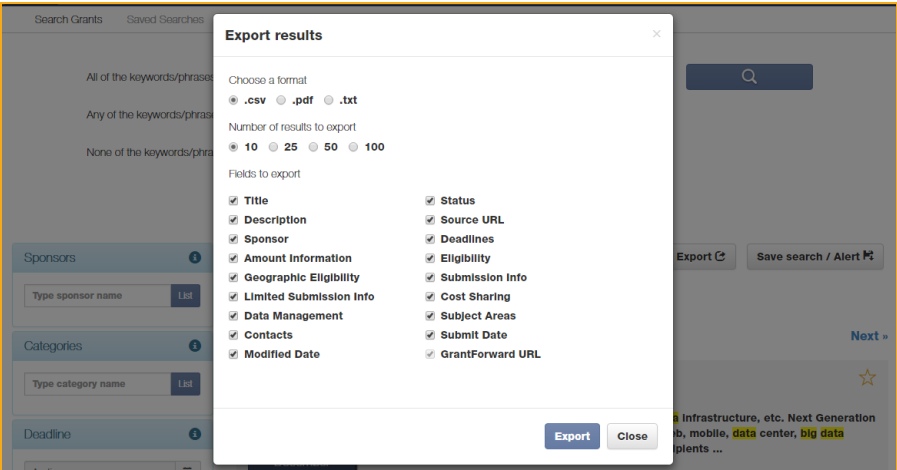
# Exporting/Favoriting Grants

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?\*\*](#)

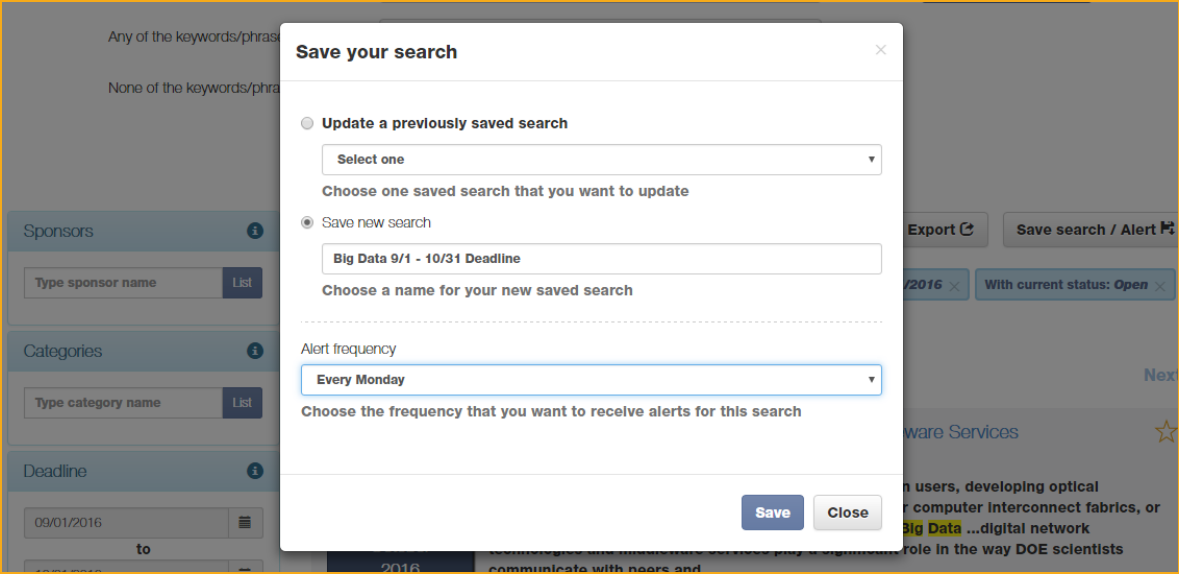
# Saving Your Search for Grant Alerts

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. 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.

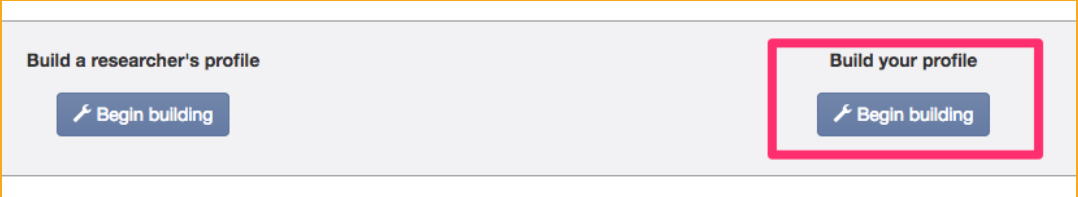


For more guidance, you can view a step by step demo--  
**QuickTip: Saving Your Search**

# 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**.



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

A screenshot of the 'Build your researcher profile' form. It has a progress bar with four steps: '1. Basic Information' (highlighted in orange), '2. Research Interests', '3. Extra Info & Profile Options', and 'Finish'. Below the progress bar, it says 'Please input your information about email, name, title and department here.' There are four input fields: 'Email ID \*' (with a pre-filled value 'Your email will be pre-filled.'), 'Name \*' (with sub-fields for 'First name' and 'Last name'), 'Title' (with a placeholder 'e.g. Associate Professor, Graduate Student'), and 'Department' (with a placeholder 'e.g. Department of Chemistry'). To the right of the fields, there are two paragraphs of explanatory text.

- 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.

A screenshot of the 'Interest Source' dropdown menu. The dropdown is open, showing 'Specify a publication webpage' as the selected option. Below the dropdown, there is a text input field for 'Publication Page' containing the URL 'http://www.forwarddatalab.org/kevinchang/publications'. Below the URL field, there is a section titled 'This URL is from...' with two radio buttons: 'personal' (selected) and 'institution'. Below this, there are logos for 'Google scholar', 'PubMed', 'ResearchGate', 'ORCID', and 'bepress™'.



- You can also upload your CV PDF (which contains publications).

Interest Source: **Upload a Curriculum Vitae**

Upload your CV: **Choose File**

Upload PDF file, maximum size 10MB

- Or, you can manually copy-and-paste your publication citation text.

Interest Source: **Manually input publications**

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** 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.

Other Interests: Life Science [x] Low [slider] High

+ Add more Interests...

**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.

**Extra profile information**

Education (optional): PhD, Electrical Engineering, Stanford University (+) 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. It is recommended to upload images which are below 1MB in size.

- 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.

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

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

**Profile submission completed successfully!**

You have created profile for researcher Kevin Chang in your institution. Later on he/she can claim this profile and use it to explore GrantForward's funding options.

The rebuilding process will take a while, depending on whether you have updated interest information or not. In the mean time you can try:

- [Build a profile for another researcher](#)
- [Search for funding opportunities](#)

**Building profile for Kevin Chang**

The process can take anywhere from 5 to 20 minutes and continue even if you leave this page

- 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?](#)**

# 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 **My Profile** under the **Researchers** tab. Here you can view your profile and get to know its various components.

The screenshot shows a researcher profile for Kevin Chang. The profile includes a header with a photo and contact information: Title (Professor), Department (Department of Computer Science), Institution (University of Illinois Urbana-Champaign), and Email (kochang@illinois.edu). Below this is a 'Basic and Contact Info' section with 'Educations' (PhD, Electrical Engineering, Stanford University) and 'Research Interests' (Social Media, Big Data, Community Detection). A 'Biography' section is currently empty. The 'Homepages' section contains a link to a Google Scholar profile. The 'Contact Information' section lists the address: 2134 Siebel Center 201 N. Goodwin Avenue Urbana, IL 61801-2302. The 'Research' section features a 'Research Interest Cloud' with terms like 'Social Media', 'Big Data', 'Community Detection', and 'Artificial Intelligence'. Below the cloud is a 'Timeline' showing research interests from 1997 to 2017. The 'Publications' section lists 106 publications, with a table showing 10 publications in 2017 and 6 in 2016. The right sidebar contains 'Search Profiles', 'Colleagues' (Stafford Hood, Andrew Haglund, Jim Hahn), 'Co-authors', 'People also viewed' (Francine Scott, Lixin Li, Aaron Martin), and 'Recommended Grants' (C-STARs Life and Medical Sciences Database Research Participant, Social Media in Education Scholarship, Office of Student Financial Aid).

- 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.

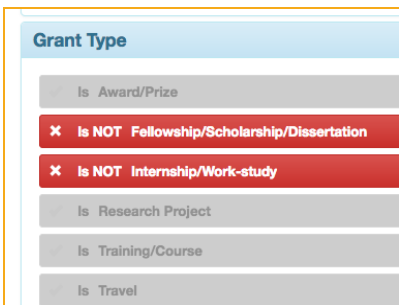
- 3 You can use your researcher profile as your research homepage that integrates all your essential information and research. Look at the browser address bar for the URL to share:



# 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.



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