



# How-To & Search Strategies

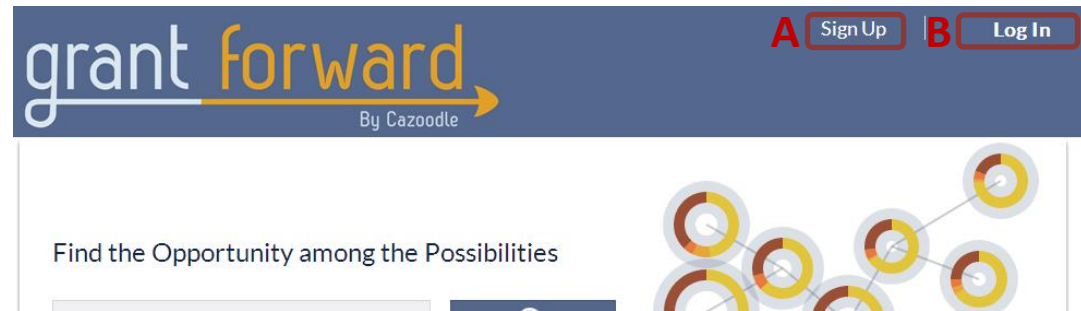
April 16<sup>th</sup>, 2013

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# Using Grant Forward

- You can use Grant Forward without signing-in while browsing from within your institution's network; our system will automatically identify you.
- You can also use Grant Forward from home by creating a user account and linking it via your institution email address. Sign Up (A) or Log In (B).
- Creating a user account will allow you to save favorites and set alerts.



# Search Results

- Search results are shown in a list-format
- Hovering your cursor over the opportunity will bring up additional details
- Clicking on the title will take you to a page with complete details of the opportunity

Keywords: chemistry

Advanced options + Clear All

Found 220 results in 2.02 seconds

Export Save search/alert Sort by Relevance

**Categories** Type category name Select

**Sponsors** Type sponsor name Select

**Deadline** Anytime to Anytime

**Sponsor Type**  Federal  State  Foundation  University  Other

**Type**  Awards/Prizes  Doctoral

**1** November 2013 **ACS Award in Theoretical Chemistry**  
*American Chemical Society (ACS)*  
To recognize innovative research in theoretical **chemistry** that either advances theoretical methodology or contributes to new discoveries about ...  
A nominee must have accomplished innovative research in the field of theoretical **chemistry**. Emphasis in the selection process will be on work ...

**1** November 2013 **ACS Award in Analytical Chemistry**  
*American Chemical Society (ACS)*  
To recognize and encourage outstanding contributions to the science of analytical **chemistry**, pure or applied, carried out in the United States ...  
A nominee must be a resident of the United States or Canada and must have made an outstanding contribution to analytical **chemistry**. Special ...

**1** November 2013 **ACS Award in Polymer Chemistry**  
*American Chemical Society (ACS)*  
This award recognizes outstanding fundamental contributions and achievements in the field of Polymer **Chemistry**...  
and/or achieved profound discoveries in polymer physical **chemistry** leading to recognized advancements in our understanding of complex macromolecular ...

**1** November 2013 **ACS Award in Inorganic Chemistry**  
*American Chemical Society (ACS)*  
To recognize and encourage fundamental research in the field of inorganic **chemistry**...

# Search Results

- Shows number of results that match the search conditions (A)
- Allows you to export the results on the page to a CSV/Excel file (B)
- Sort the results based on Relevance, Deadline, Newest, Title and Sponsor (C)

The screenshot shows a search interface with the following elements:

- Keywords:** A search bar containing the text "search by keywords & phrases" and a search icon.
- Advanced options +:** A section containing a "Clear All" link, an "Export" button (labeled B), a "Save search/alert" button, and a "Sort by" dropdown menu (labeled C) set to "Relevance".
- Results:** A list of search results. The first result is "Pioneer Hi-Bred International Graduate Student Fellowship" by the "Entomological Foundation". It includes a large number "1" in a dark blue box, a star icon, and a description: "This award is given only once every 4 years. The Pioneer Hi-Bred International Graduate Student Fellowship recognizes and encourages innovative research and..."
- Annotations:** Red letters A, B, and C are placed on the page. 'A' is next to the text "Found 3391 results in 0.21 seconds". 'B' is above the "Export" button. 'C' is above the "Sort by" dropdown menu.

# Filtering your Search

- Basic Search may yield many results
- Use filtering tools to pare down results. You are able to filter by
  - Keywords
  - Categories
  - Sponsor
  - Deadline
  - Sponsor Type
  - Opportunity Type
  - Status
  - Submission (Limited)
  - Applicant Type

# Filtering your Search - Keywords

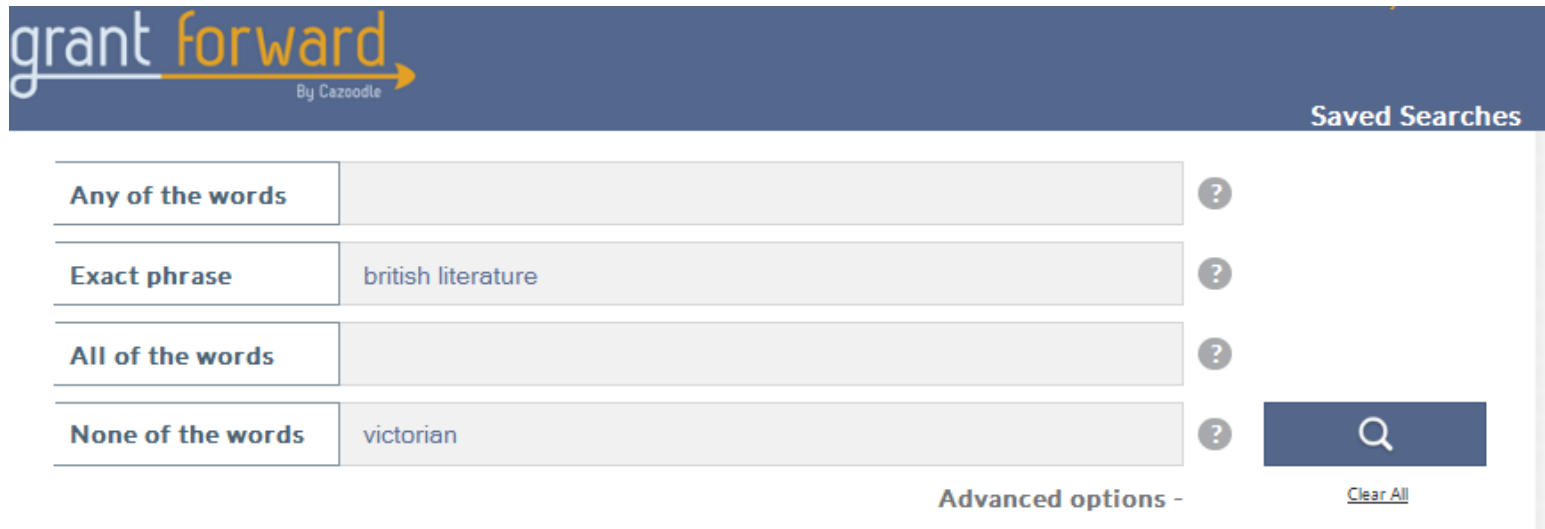
- Use keyword-based Basic Search (similar to Google) to get an idea of what is available
- Keywords are drawn from opportunities' text, including title and description
- Keyword search can be general, e.g., “Medical Science,” or more specific, “Preventive Cardiology”



The screenshot displays the 'grant forward' search interface. At the top, the logo 'grant forward' is visible with the tagline 'By Cazoodle'. Below the logo is a search bar with the text 'Preventive Cardiology' and a search icon. To the right of the search bar is a 'Saved Searches' link. Below the search bar are 'Advanced options +' and a 'Clear All' link. The search results section shows 'Found 681 results in 0.29 seconds' and buttons for 'Export', 'Save search/alert', and 'Sort by Relevance'. On the left side, there are filters for 'Categories' and 'Sponsors'. The main search result is for 'PAR-12-172: Translational Research to Improve Obesity and Diabetes Outcomes (R18)' from the 'Office of Population Affairs'. The result includes a large number '1' and the date 'March 2013'. The description of the grant is: 'Mathematics, Statistics, Medical Sciences, Biomedicine, Behavioral Medicine, **Cardiology, Preventive Cardiology**, Endocrinology, Pediatrics, Behavioral Pediatrics ... or approaches **prevent** and treat diabetes and/or obesity. Research must target the **prevention** or reversal of obesity, **prevention** of type 2 diabetes, improved care ...'.

# Filtering your Search - Keywords

- Use the Advanced Keyword Option to search based on the text e.g., title and description, of funding opportunities



The screenshot shows the 'grant forward' search interface. The logo 'grant forward' is in the top left, with 'By Cazoodle' underneath. In the top right, there is a 'Saved Searches' link. Below the logo, there are four search options, each with a text input field and a help icon (a question mark in a circle):

Any of the words		?
Exact phrase	british literature	?
All of the words		?
None of the words	victorian	?

At the bottom right of the search area, there is a dark blue search button with a magnifying glass icon and a 'Clear All' link. Below the search options, the text 'Advanced options -' is visible.

For example, a researcher interested in British Literature may search for this exact phrase by using the corresponding box. Additionally, if they are not interested in the Victorian era, they also view grants which do not contain that particular keyword



# Filtering your Search – Categories

- Categories provide a basic level of structure for queries
  - You can search and add categories using the keyword box (A) or select them from a list (B)
  - Categories consists of 39 subject areas broad disciplines, including Humanities, Medical Sciences, etc. (C)
  - Each category is further subdivided into numerous focused sub-categories (D)
  - Choosing a parent category automatically selects all the sub-categories

The screenshot displays a search interface with several filter sections. The 'Categories' section is expanded, showing a list of categories with their respective subcategory counts. A search box (A) and a 'Select' button (B) are visible. The 'Sponsors' and 'Deadline' sections are also visible. A 'Categories' dropdown menu is open, showing a list of categories with their subcategory counts. A red circle (C) highlights the 'Arts' category, and a red letter (D) points to the subcategory count for 'Arts'.

Category	Subcategories
✓ Agriculture	10 Subcategories
✓ Area Studies	11 Subcategories
✓ Arts	11 Subcategories
✓ Behavioral Sciences	4 Subcategories
✓ Biotechnology	3 Subcategories
✓ Business Administration	10 Subcategories
✓ Communication	5 Subcategories
✓ Computer Science	8 Subcategories
✓ Earth Sciences	12 Subcategories

# Filtering your Search – Sponsors

- Sponsors are a structured list of opportunity providers
  - You can search and add sponsors using the keyword box (A) or select them from a list (B,C)

The screenshot shows a search interface with several filter sections:

- Keywords:** A search box with a 'select' button.
- Categories:** A section with a '+ Categories' header, a search box labeled 'Type category name' with a 'Select' button, and a dropdown menu.
- Sponsors:** A section with a '+ Sponsors' header, a search box labeled 'Type sponsor name' with a 'Select' button, a dropdown menu showing 'National Academy of ...', and a 'clear sponsors' link.
- Deadline:** A section with a '+ Deadline' header and two date range selectors, each with an 'Anytime' option and a grid icon.

The Sponsors filter is expanded, showing a list of organizations with checkboxes and a letter index on the left. A red 'C' highlights the 'Paralyzed Veterans of America' entry.

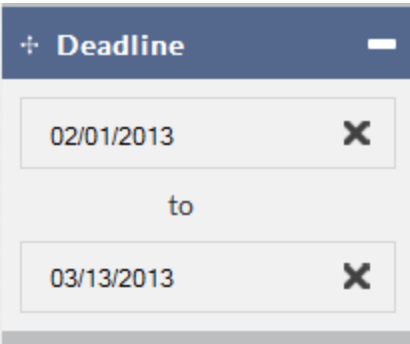
Letter	Sponsor Name	Selected
0-9	Pan American Health and Education Foundation	<input checked="" type="checkbox"/>
A	Pan American Health Organization - Division of ...	<input checked="" type="checkbox"/>
B	Pancreatic Cancer Action Network	<input checked="" type="checkbox"/>
C	Panthera - Special Grant Programs - Save the Tiger ...	<input checked="" type="checkbox"/>
D	Paraguay USAID-Asuncion	<input checked="" type="checkbox"/>
E	Paralyzed Veterans of America	<input checked="" type="checkbox"/>
F	Parapsychology Foundation	<input checked="" type="checkbox"/>
G	Pardee (Elsa U.) Foundation	<input checked="" type="checkbox"/>
H	Parenteral Drug Association Foundation for ...	<input checked="" type="checkbox"/>
I	Paris Review	<input checked="" type="checkbox"/>
J	Parkening International Classical Guitar ...	<input checked="" type="checkbox"/>
K	Parkinson	<input checked="" type="checkbox"/>
L	Parks (William and Charlotte) Foundation for ...	<input checked="" type="checkbox"/>
M	Partners for Arts Education	<input checked="" type="checkbox"/>
N	Partners of the Americas	<input checked="" type="checkbox"/>
O	Partnership for a Healthier America	<input checked="" type="checkbox"/>
P		
Q		
R		
S		
T		
U		
V		
W		
X		
Y		
Z		

Buttons: Update, Cancel

# Filtering your Search – Deadline

- Deadline filter allows you to search for opportunities based on submission deadlines
  - You can search for opportunities whose deadlines are within a date range (A)
  - You can also search for opportunities whose deadline is before (B) or after a certain date (C)

**A**



Deadline

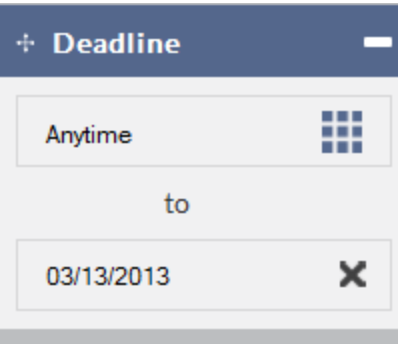
02/01/2013

to

03/13/2013

This screenshot shows the 'Deadline' filter interface with a date range selected. The top bar is dark blue with a plus icon, the word 'Deadline', and a minus icon. Below it, two input fields are stacked vertically, separated by the word 'to'. The first field contains the date '02/01/2013' and the second contains '03/13/2013'. Each field has a small 'x' icon on the right side for clearing the input.

**B**



Deadline

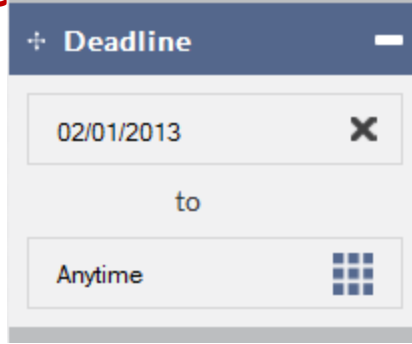
Anytime

to

03/13/2013

This screenshot shows the 'Deadline' filter interface with a search for opportunities with a deadline before a specific date. The top bar is dark blue with a plus icon, the word 'Deadline', and a minus icon. Below it, two input fields are stacked vertically, separated by the word 'to'. The first field contains the word 'Anytime' and the second contains the date '03/13/2013'. Each field has a small 'x' icon on the right side for clearing the input. The 'Anytime' field also has a small grid icon on the right side.

**C**



Deadline

02/01/2013

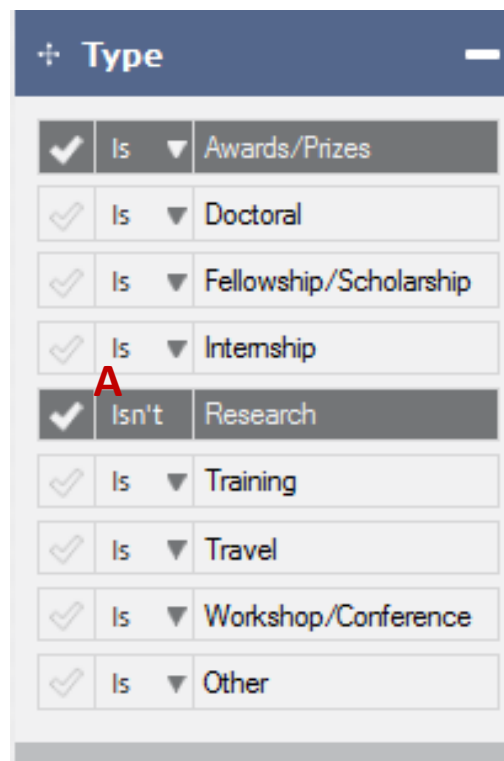
to

Anytime

This screenshot shows the 'Deadline' filter interface with a search for opportunities with a deadline after a specific date. The top bar is dark blue with a plus icon, the word 'Deadline', and a minus icon. Below it, two input fields are stacked vertically, separated by the word 'to'. The first field contains the date '02/01/2013' and the second contains the word 'Anytime'. Each field has a small 'x' icon on the right side for clearing the input. The 'Anytime' field also has a small grid icon on the right side.

# Filtering your Search – Opportunity Type

- Opportunity type allows you to specify the type of opportunity you are looking for
  - You can search for Doctoral, Fellowships & Scholarships, Award, among others
  - You can modify your search so that no opportunities of a certain type are displayed (A)

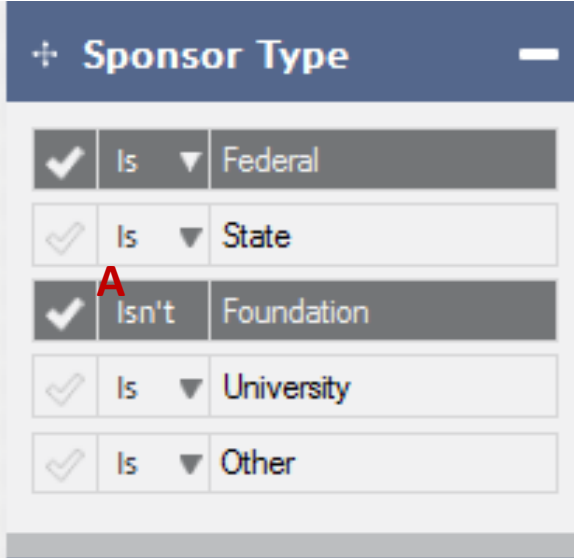


The screenshot shows a search filter interface titled "Type". It contains a list of opportunity types, each with a checkbox and a dropdown menu. The "Research" option is selected with "Isn't" in the dropdown, and a red letter "A" is placed above it. The other options are "Awards/Prizes", "Doctoral", "Fellowship/Scholarship", "Internship", "Training", "Travel", "Workshop/Conference", and "Other", all with "Is" in the dropdown.

+ Type -		
<input checked="" type="checkbox"/>	Is	Awards/Prizes
<input checked="" type="checkbox"/>	Is	Doctoral
<input checked="" type="checkbox"/>	Is	Fellowship/Scholarship
<input checked="" type="checkbox"/>	Is	Internship
<input checked="" type="checkbox"/>	Isn't	Research
<input checked="" type="checkbox"/>	Is	Training
<input checked="" type="checkbox"/>	Is	Travel
<input checked="" type="checkbox"/>	Is	Workshop/Conference
<input checked="" type="checkbox"/>	Is	Other

# Filtering your Search – Sponsor Type

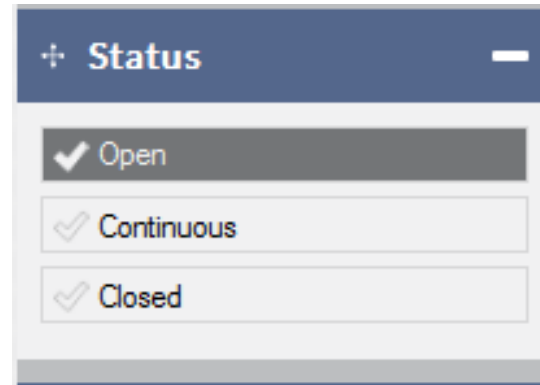
- Sponsor type allows you to specify the type of sponsor you are looking for
  - You can search for Federal, State, Foundation, University, Other
  - You can modify your search so that no sponsors of a certain type are displayed (A)



+ Sponsor Type -		
<input checked="" type="checkbox"/>	Is ▼	Federal
<input type="checkbox"/>	Is ▼	State
<input checked="" type="checkbox"/>	Isn't	Foundation
<input type="checkbox"/>	Is ▼	University
<input type="checkbox"/>	Is ▼	Other

# Filtering your Search – Status

- Status enables you look for opportunities based on their status
  - You can choose more than one of the statuses
    - Open
    - Continuous
    - Closed



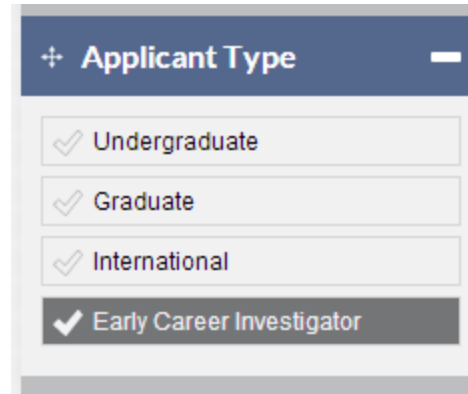
# Filtering your Search – Submission

- Limited Submission
  - Some submissions require internal coordination before proposal submission, due to a limit on per-institution submissions by the sponsor
  - Choose 'Is Limited' to filter opportunities to the limited submissions



# Filtering your Search – Applicant Type

- Applicant Type allows you to specify special types of applicants looking for funding opportunities
  - You may choose more than one of these types
    - Undergraduate
    - Graduate
    - International
    - Early Career Investigator





# Search Preferences

- Reorder filters by dragging and dropping them to the position you prefer
- Order of the filters will be remembered every time you log in or use the same computer. This order will be reflected in the advanced search options in the home page and in the search page
- The latest options within the filters you choose will be stored and automatically be chosen till you change them

The screenshot displays a search preferences interface with several filter sections:



- Categories:** A search box labeled "Type category name" with a "Select" button.
- Sponsors:** A search box labeled "Type sponsor name" with a "Select" button.
- Sponsor Type:** A list of options with checkboxes and dropdown menus:
  - Is Federal
  - Is State
  - Is Foundation
  - Is University
  - Is Other
- Deadline:** A date range selector with "Anytime" in the first box, "to" in the middle, and "Anytime" in the second box. A calendar icon is visible on the right.
- Type:** A list of options with checkboxes and dropdown menus:
  - Is Awards/Prizes
  - Is Doctoral

# User Accounts

- Link your user account with your institution via your institution email
- Browse from off-campus without proxies or VPNs
- Save favorites, save searches and set alerts

<http://www.grantforward.com/signup>

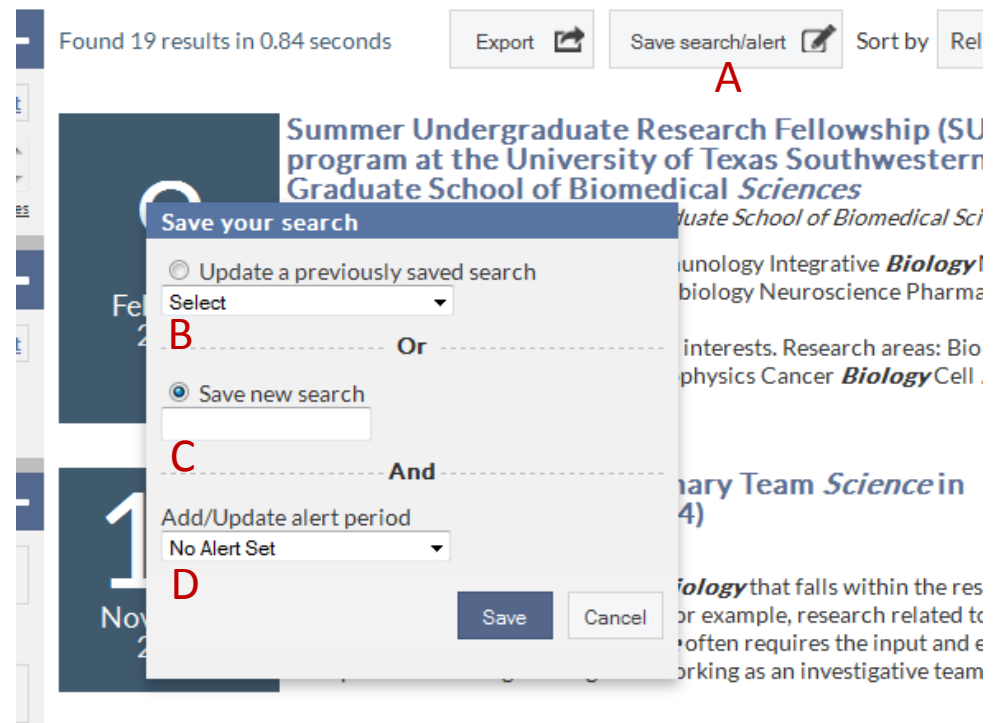
# Denoting Favorites

21 November 2013	<b>NSF <i>Science, Engineering and Education for Sustainability Fellows NSF SEES</i> Fellows</b> <i>National Science Foundation</i> There is a critical need to develop the workforce in the area of sustainability <i>science</i> and engineering. Through SEES Fellows, NSF <i>seeks</i> to advance ... <i>science</i> , engineering, and education to inform the societal actions needed for environmental and economic sustainability and sustainable human well ...		
Submission Date(s)	Amount	Eligibility	Submission Info
13 August 2013	<b>NSF <i>Scholarships in Science, Technology, Engineering, and Mathematics</i></b> <i>National Science Foundation</i> enabling them to enter the STEM workforce or STEM graduate school following completion of an associate, baccalaureate, or graduate-level degree in <i>science</i> ...		

- “Favorite” an opportunity by clicking the small gold star, featured on the right of the search results, or in the opportunity’s detail page
- All opportunities that are marked as “Favorite” will be saved to your account and you will be notified of any changes that a sponsor makes to them
- An empty star indicates that the opportunity has **not** been marked as “Favorite”
- A filled star indicates an opportunity which has already been marked as “Favorite”

# Saving Searches and Setting Alerts

- Saving a search will save the filters and keywords used to trigger the search
- Alerts may also be set to notify you periodically when new results match your query
- Clicking “Save Search/alert” (A) will bring up a box in which you may
  - Overwrite a previously saved search (B)
  - Save as a new search (C)
  - Set an alert and select the frequency with which you wish to receive updates on new opportunities (D)



# Viewing Saved Information

- Upon logging-in, the top of each page will show your name. Clicking on this link will show a list of account options:
  - See Profile: general profile information
  - See My Favorites: view a list of opportunities that have been saved as favorite
  - See My Searches: view a list of saved searches
  - See My Settings: view and modify notification settings
  - Sign Out: sign out of your current session (if on a public computer)

# Profile Information

- Modify information (including password), by clicking the pencil icon
- Link your account with a new institution by providing your institution email

**Truman Shuck**

Member of Cazoodle  
Your subscription to Grant Forward will end on December 31, 9999. [Renew Now >>](#)  
*Did you know...* you can get involved in Grant Forward's development and discuss funding-related topics with fellow grantseekers on our forum? [Click here to activate your forum access now >>](#)

My Profile | My Favorites | My Searches | My Subscription | My Settings

**Basic Information**

First Name	Truman
Last Name	Shuck
Phone	
Email	Truman.Shuck@Cazoodle.com
Password	.....

**Institution Linking**

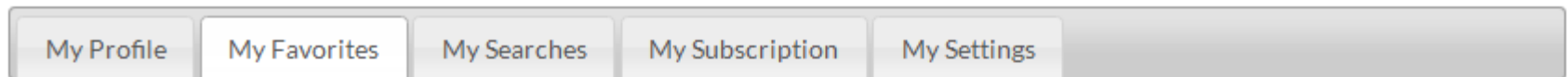
My account is currently linked to the following institution. [Why should I link to my institution?](#)

Institution Name	Cazoodle
Institution Email	Truman.Shuck@Cazoodle.com
Department	All

[Update Link](#)

# Favorites

- Favorites are organized by their deadline
- Choose different ranges to view upcoming deadlines
- Click on the orange star to remove opportunity from favorites



## Jump to My Favorite Grants With Deadlines:

[This Week](#) / [Next Week](#) / [This Month](#) / [Next 3 Months](#) / [Rest of the Year](#) / [Next Year](#) / [No Deadlines](#) / [All](#)

<b>1</b> February 2013	<b>Innovative Systems for Military Missions</b> <i>Department of Defense</i> This solicitation seeks system and subsystem level technologies that enable revolutionary improvements to the efficiency and effectiveness of the military. Novel concepts are sought in four focus areas: space systems and space awareness, hypersonics-space access,	★
<b>15</b>	<b>PAR-11-079: Cancer Prevention Research Small Grant Program (R03)</b> <i>Office of Population Affairs</i>	★

# Searches and Alerts

- Saved searches and alerts are shown here
  - Name your search (A)
  - Modify or remove alert (B)
  - Edit your search (C)
  - Remove saved search (D)

My Profile My Favorites My Searches My Subscription My Settings

You can view, edit, and set alerts on your saved searches. You will receive your alerts in an email, according to the alert frequency you set.

**Humanities** **A**

Category Is Humanities

Alert Information

Alert Frequency **Every Day** **B**

Your next alert will be delivered on January 29, 2013.

Search Edit Search **C** Remove **D**

**Agriculture**

Category Is Agriculture *And*Status Isn't Any

Alert Information

Alert Frequency **Every Day**

Your next alert will be delivered on January 29, 2013.

Search Edit Search Remove

**Area studies**

Category Is Area Studies *And*Status Isn't Any

Alert Information

Alert Frequency **Every Day**

Your next alert will be delivered on January 29, 2013.

Search Edit Search Remove



# Questions? Feedback?

- Email us at [feedback@grantforward.com](mailto:feedback@grantforward.com)

Want to see where we're going?

<http://www.grantforward.com/roadmap>

# Thank You!

