Defining Your Search

Tutorial Updated on 02.13.14
How can this help?

This tutorial is designed to teach you how to maximize the efficiency of your search results.

How do you Search for Grants?
1) Keywords
2) Categories & Subcategories
3) Advanced Search +
Here we see the Grant Forward homepage with the Keywords and Categories search features.
Using Categories

Example: Search for “Infectious Diseases”

1) Go to the "Categories" search bar on our homepage. To pick from a specific category, you can either use our auto-fill option or click on "Select from List"

2) From there, you can either select the entire category (i.e. Medical Sciences) or go into the subcategories.
   a) For a specific search, such as, Infectious Diseases, scroll down to Medical Sciences >> Disease and Disorders >> Infectious Diseases.

3) Press the Update button and the results will contain all of the grants listed under the "Infectious Disease" category.
When selecting multiple options from the different search categories, note that:

- While **within the bounds** of the filters, these results correlate with an ‘or’ selection.

- However, **between filters**, these results correlate with an ‘and’ selection.

  e.g. You can choose a **Federal Sponsor Type AND** **Doctoral OR Research**.

This will yield results pertaining to:

All **Federal Doctoral** and all **Federal Research** opportunities.
In order to use **Advanced Search**, let’s start by defining the various options that are listed:

- **Sponsors** -
  - those organizations & agencies who provide the Grants listed on Grant Forward’s website

- **Deadline** -
  - when choosing dates, you are choosing the range of deadlines for the funding opportunities.

- **Sponsor Type** (*5 types*) -
  - **Federal**: grants funded by the Federal government
  - **State**: grants funded by the state
  - **Foundation**: grants funded by an independent institution
  - **University**: grants funded by public/private university
  - **Other**: grants that fall into categories other than the ones listed above.
Advanced Search + Defined

- **Type (9 types)** -
  - Institutions
  - Award/Prizes
  - Doctoral
  - Fellowship/Scholarship
  - Internship
  - Research
  - Training
  - Travel
  - Workshop/Conference
  - Other

- **Status** -
  - Open: still accepting applications
  - Continuous: no deadline
  - Closed: deadline has passed

- **Submission** -
  - If the grant is listed under ‘Limited,’ it only allows for one applicant/grant per institution.

- **Applicant Type** -
  - This filter helps you find opportunities specific for Undergraduate, Graduate, International, and Early Career Investigator
When browsing, the features defined above will also be made available on the left hand side of the screen. As you refine your results, the funding opportunities will be refreshed. By clicking on the (+) next to the Advanced options (shown below) users can also *expand their specifications.*

Expanding specifications allow users to find funding opportunities using “any of the words,” “exact phrase,” “all of the words,” and “none of the words.”
Thank you!

For more guides & tutorials - please refer to our FAQ.
Refining Your Results

Tutorial Updated 03.14.14
How can this help?

This tutorial is designed to teach you how to maximize the efficiency of your search results.

In this tutorial, we will go over:

3 Options under “Search” drop down menu:
1) Search Home
2) Saved Searches
3) Favorites

Other Options:
1) Exporting
2) Options seen through Funding Opportunity Grant Page
Here you can see the Grant Forward Homepage. From here, you can access these 3 options by hovering over “Search.”

Search Features

Search
Profile
Recommendations
Administrator Console

Search Home
Saved Searches
Favorites

Keywords

Categories
enter categories, e.g., "Aerospace"

Advanced Search +

Clear All
After searching using “Keywords” and “Categories,” you are brought to this page. From here, you are able to:
- browse your results
- edit/revise your ‘Categories,’ ‘Sponsors,’ ‘Deadline,’ ‘Sponsor Type,’ ‘Type,’ ‘Status,’ ‘Submission,’ and ‘Applicant Type.’

From here, you are also able to:
- Save your search/alert results*  
  *saved searches/alerts are updated in time.
- Export your searches (will be discussed in another slide)
Save your Search Criteria

After you have found your desired searches, users are able to save these searches.

**Saved Searches - What are they?**
They are previous search filters that have been saved by the user for future use.

*Saved searches/alerts are updated in time.

**Alerts - What are they?**
When saving filters, users can use this option to notify them of when new results related to their saved searches are added. They can choose to be notified:

- Every Day
- Every Monday
- Every First Day of the Month
Alerts for your Saved Search Criteria

In order to edit your searches, you can directly click on the “Saved Searches” in the bar, to get to this page with more options:

On this page, you can browse, search, edit, and remove your saved searches. You can also set the your desired time and frequency of your alert.
To save result as a ‘favorite,’ click the star on the right. Favorites are organized by time & deadlines.
Exporting your Search Results

Users can use this option to download a file containing a list of their results. When the windows that pops up, users will be able to select/deselect a variety of choices. (CSV: Excel Document, PDF: Portable Document Format, and TXT: Text File)
After clicking on the link to the Funding Opportunity, users will be brought to this page where they are presented with many familiar options seen before. From here, users can ‘Annotate,’ ‘Favorite,’ ‘Export,’ and ‘Expand/Collapse.’

**Annotate** -
As an administrator, you can leave notes for yourself/others at your institution. They can be in the form of contact information and another other information you want to provide.
In addition to the options shown on the previous page, users are able to access the source of the actual opportunity source via the link provided.
Thank you!

For more guides & tutorials - please refer to our FAQ.