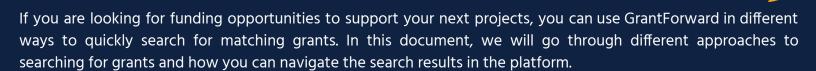


Find Grants



Find more GrantForward support materials, including those referenced here, as well as Guides, Administrator Tools, Tutorials, UseCases, and Webinars at <u>GrantForward.com/support</u>.

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1. Find Grants

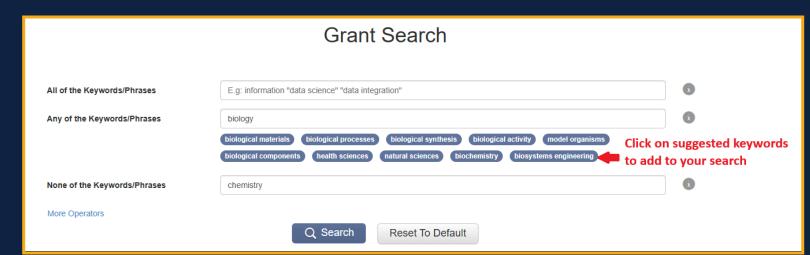
1.1. Find Grants with Advanced Keywords and Filters

If you already have some ideas about the topic and a set of keywords to look for grants, you can use our Advanced Keyword Search and then utilize multiple filters to narrow your search easily.

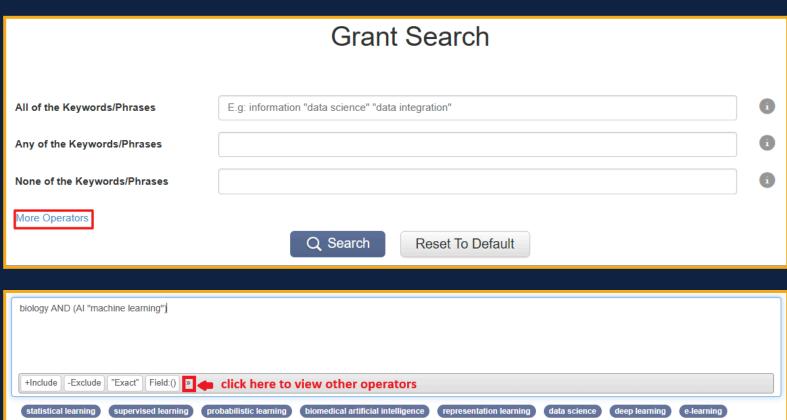
- Go to the <u>Search Grant Opportunities</u> page under the Grants tab.
- Fill in your research interests in the search boxes.
 - o All of the Keywords/Phrases: Opportunities must contain all of these search terms.
 - Any of the Keywords/Phrases: Opportunities need to include one or more of these search terms.
 - None of the Keywords/Phrases: Opportunities that contain these search terms will be excluded from the search results.

Tips:

- Use the space or comma to separate terms, and double quote marks to search for the whole phrase.
- Our system will use AI to automatically generate relevant keywords and phrases relevant to your input. You just need to click on any suggested keywords/phrases to add them to your search.



- Press Enter or click on the Search button to execute the search.
- For more complicated search, you can click on More Operators under the search boxes to use Boolean Operators (AND, OR), Exact Phrase Searching (" "), Parentheses (), Field-Specific Operators (field:), Include (+), and Exclude (-). For example:
 - -STEM returns opportunities that do not have the word STEM.
 - o biology AND (Al "machine learning") returns opportunities that must have the word **biology** and **Al**, or **biology** with the exact phrase **machine learning**.
 - o description:(chemistry) returns opportunities that have **chemistry** in the grant description.

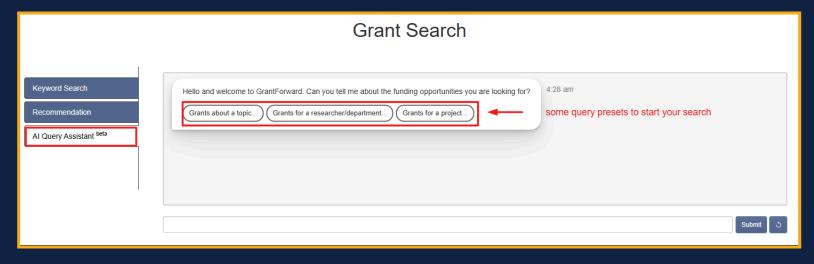


Once you have finished choosing your keywords, you can use all filters listed on the left panel (Sponsors, Deadline, Amount, Sponsor Types, Grant Types, etc.) to help narrow down your search results. You may refer to the document What Advanced Search Filters Can I Use for Searching Grants? on how to use advanced search filters.

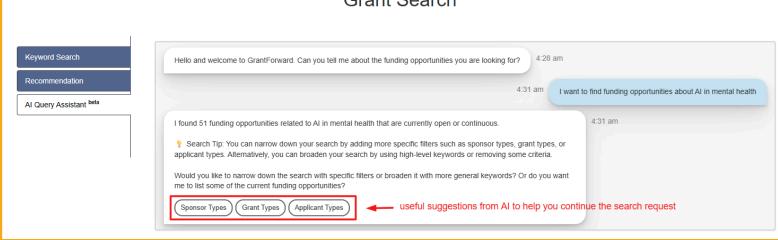
1.2. Find Grants with AI Query Assistant

You can easily start searching for grants on GrantForward by conversing with our AI assistant.

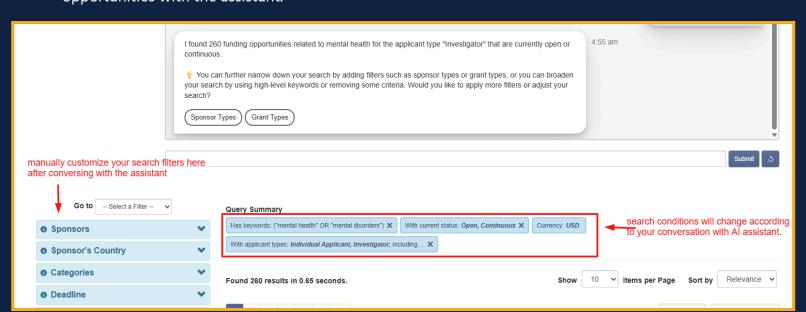
- Go to the <u>Search Grant Opportunities</u> page under the **Grants** tab.
- Choose **Al Query Assistant** and select any of the query presets to start your search. Click on the next prompts from the Al's answers to help you navigate the chat more efficiently as you continue to make requests for the Al assistant.



Grant Search



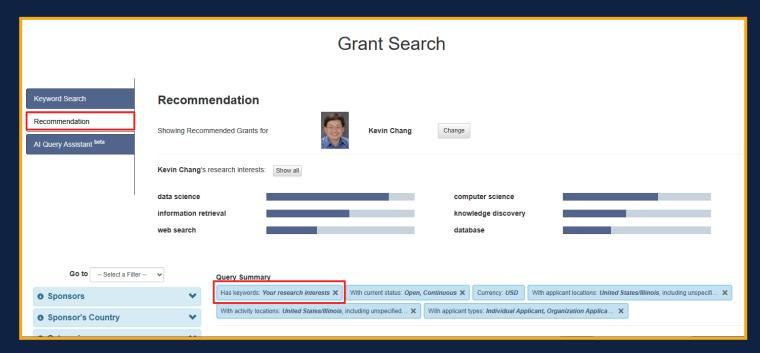
- As you give the search request and the AI assistant answers, the search conditions (including keywords and filters) will also change accordingly. The filters can be further customized manually, which offers flexibility for your search.
- Besides using the presets, you can also freely enter your conditions in the chat box to find specific funding opportunities with the assistant.



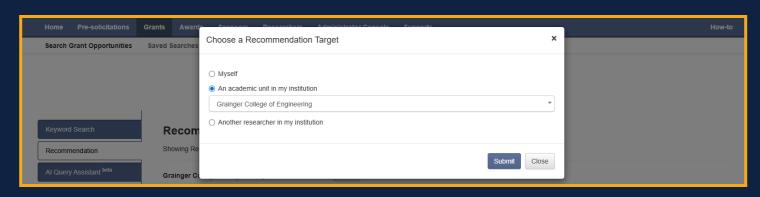
1.3. Find Grants by Researchers and Departments (only for Master Administrator account)

If your account permission is Master Administrator, you can quickly search for grants for any specific researchers or departments on GrantForward.

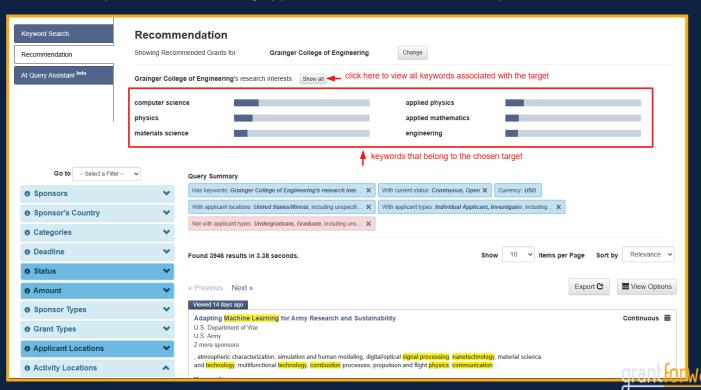
- Go to the **Search Grant Opportunities** page under the **Grants** tab.
- Choose **Recommendation**, as a default, the system will show grants that are targeted specifically to your research interests.



Click on the Change button, and choose the researcher or department you want to find grants for. Each
option will have a drop-down menu for you to choose from.



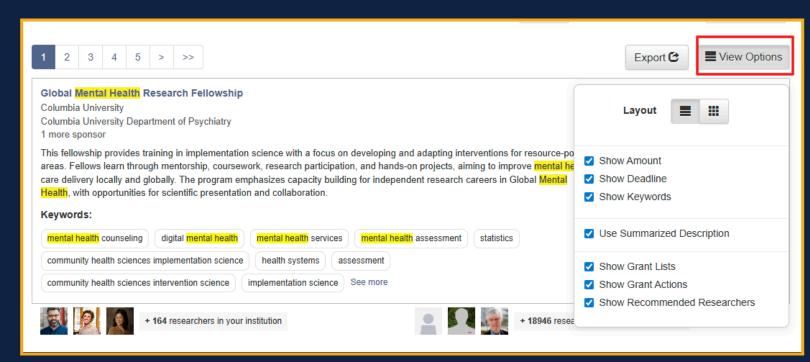
• Click **Submit**, and the system will show interest keywords associated with the chosen researcher/department, and funding opportunities that match these keywords.



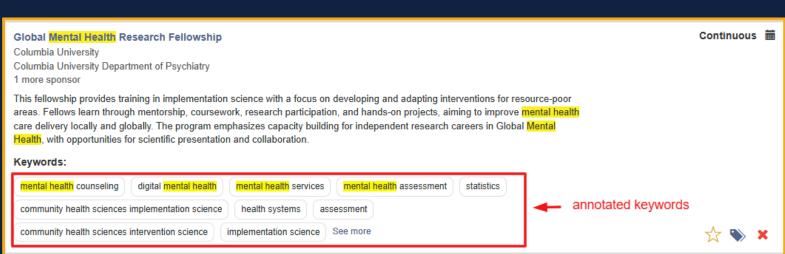
2. Navigate Search Results

2.1. Scan Your Search Results

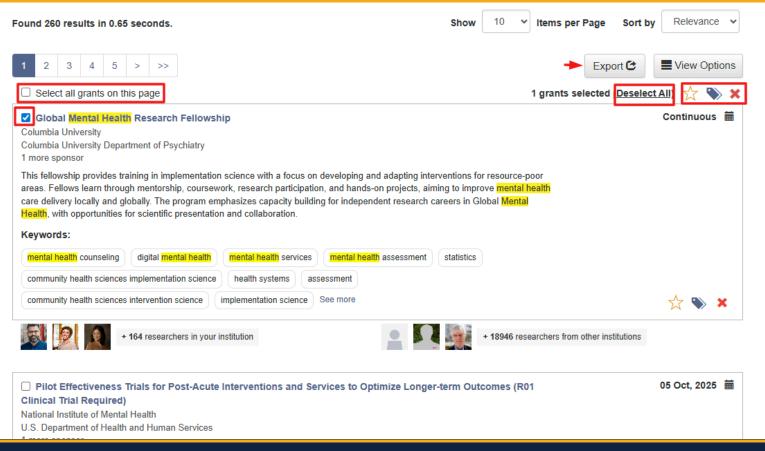
• Click on the **View Options** button to choose the search layout and customize the information you want to show for a grant.



• The matching keywords in each grant are highlighted, so you can easily scan the results. Besides the input keywords, GrantForward also tags relevant keywords for each grant called "annotated keywords". These annotated keywords help you understand the content of funding opportunities and also help us facilitate matching grants to your search semantically and contextually.



• Hover your mouse near the grant title, then you can multi-select grants or deselect all, and do different actions on the selected grants, including favoriting a grant, adding it to grant lists, excluding them from your search, or exporting them.



• Select the **Share Url** button to share your search with others quickly.

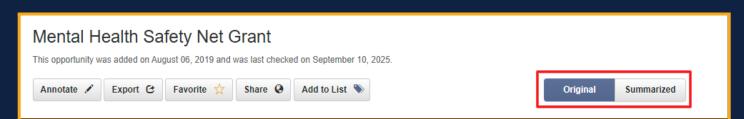


• Once you finish reviewing your search, you can save your search and set up the email alerts to receive notifications whenever there are new grants that match your search criteria. For more details, please visit this guide: Monitor and Get Alerts for New Grant Opportunities.

2.2. Check a Specific Result

Click on the grant title to see the details of each funding opportunity. On the grant detail page, you can:

• **Summarize:** Flip between the original information and the Summary by Al.



- **Export:** Download an individual grant in a different format (.csv, .pdf, .txt)
- **Favorite:** Mark a grant as your favorite to receive notifications when any information about your favorite grants is changed.
- **Share:** Forward an individual grant to your friends/colleagues via email. Make sure your recipients have a GrantForward account to be able to receive your email.
- Add to List: pick a grant to any specific list you have created. You can refer to this document: <u>How Can I</u>

 <u>Build and Manage Grant Lists?</u> to help you create a list of specific grants.

