



# 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



Search

Profile<sup>BETA</sup>

Recommendations<sup>BETA</sup>

Administrator Console

Search Home  
Saved Searches  
Favorites



Keywords



Categories

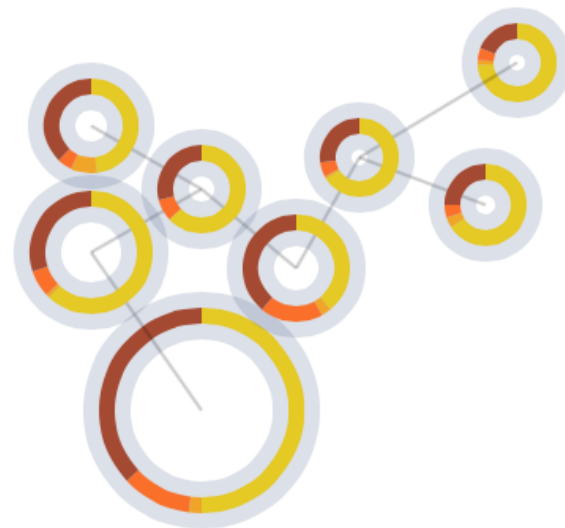
enter categories, e.g., "Aerospace"

Select from list

Advanced Search +



[Clear All](#)



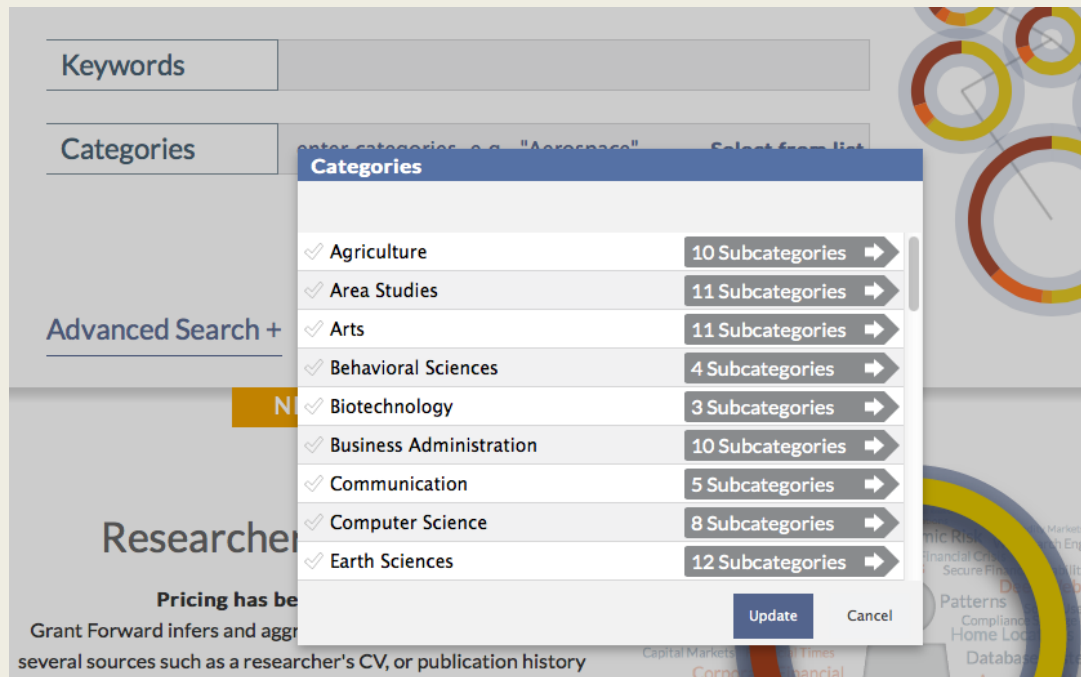
Keywords & Categories

Feed

# 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.



Search Home  
Saved Searches  
Favorites

Keywords

Categories

enter categories, e.g., "Aerospace"

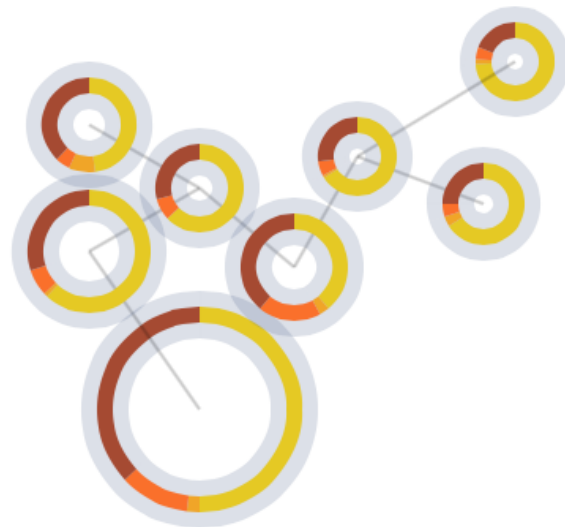
Select from list



[Advanced Search +](#)



[Clear All](#)



Advanced Search

# Using Advanced Search +

To reset your search options, simply press "Clear All."

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.

## Advanced Search –



[Clear All](#)

Sponsors

enter sponsor names, e.g., "NSF"

[Select from list](#)

Deadline

Anytime



to

Anytime



Sponsor Type

☒ Federal

☒ State

☒ Foundation

☒ University

☒ Other

Type

☒ Awards/Prizes

☒ Doctoral

☒ Fellowship/Scholarship

☒ Internship

☒ Research

☒ Training

☒ Travel

☒ Workshop/Conference

☒ Other

Status



☒ Open

☒ Continuous

☒ Closed

Submission

☒ Is Limited

☒ Is Not Limited

Applicant Type

☒ Undergraduate

☒ Graduate

☒ International

☒ Early Career Investigator

# Advanced Search + Defined

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 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



# Advanced Search + Features

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**.

The screenshot displays the Advanced Search interface. On the left, there are four filter panels: Categories, Sponsors, Deadline, and Sponsor Type. The main search area includes a top navigation bar with 'Search', 'Profile BETA', 'Recommendations BETA', and 'Administrator Console'. Below this is a sub-navigation bar with 'Search Home', 'Saved Searches', and 'Favorites'. The search input area contains four options: 'Any of the words', 'Exact phrase', 'All of the words', and 'None of the words', each with a help icon. A search button with a magnifying glass icon is to the right. Below the search input is a 'Clear All' link. The results section shows 'Found 0 results in 0.00 seconds' and buttons for 'Export', 'Save search/alert', and 'Relevance'. On the right, there are three filter panels: Type, Status, and Submission, and a fourth panel for Applicant Type at the bottom. Red arrows point to the 'Advanced options -' link, the 'Any of the words' option, the 'Exact phrase' option, the 'All of the words' option, the 'None of the words' option, the search button, the 'Clear All' link, the 'Export' button, the 'Save search/alert' button, the 'Relevance' button, and the 'Applicant Type' panel.

**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

Profile<sup>BETA</sup>

Recommendations<sup>BETA</sup>

Administrator Console

Search Home  
Saved Searches  
Favorites



Keywords

Categories

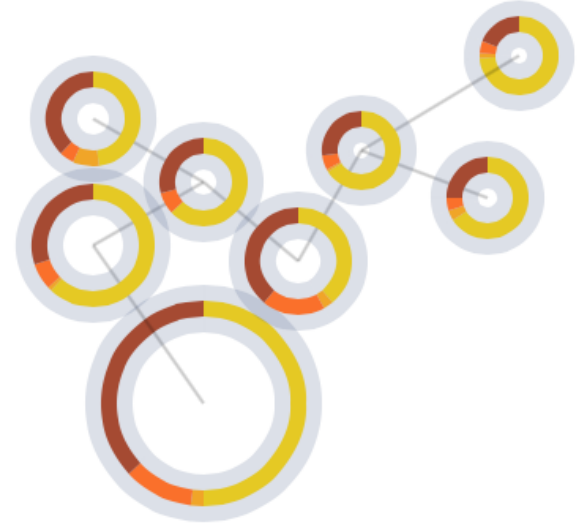
enter categories, e.g., "Aerospace"

Select from list

Advanced Search +



[Clear All](#)



Search Features

Feed

# From Search to Result

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.'

The screenshot shows the 'grant forward' search results page. At the top, the logo 'grant forward' is displayed with 'By Cazoodle' underneath. Below the logo is a navigation bar with links: 'Search', 'Profile BETA', 'Recommendations BETA', and 'Administrator Console'. Under 'Search', there are sub-links: 'Search Home', 'Saved Searches', and 'Favorites'. The main search area has a 'Keywords' field containing 'infectious disease' and a search button. To the right of the search bar are links for 'Advanced options +', 'Clear All', 'Export', 'Save search/alert', and 'Sort by'. Below the search bar, it says 'Found 1894 results in 0.13 seconds'. On the left sidebar, there are three expandable sections: 'Categories', 'Sponsors', and 'Deadline'. Each section has a 'Type' field and a 'Select' button. The main content area displays two search results. The first result is for the 'SSI/ISID Fellowship' by the 'International Society for Infectious Diseases', dated '31 March 2014'. The second result is for 'Ecology and Evolution of Infectious Diseases' by the 'National Science Foundation', dated '19 November 2014'. A red arrow points from the 'Keywords' field to the 'Categories' section. Another red arrow points from the 'Advanced options +' link to the 'Save search/alert' button. A third red arrow points from the 'Save search/alert' button to a tooltip that says 'Click here to save and set an alert on this search.' A fourth red arrow points from the 'Export' button to the 'Export your searches' text on the right. A 'Feedback' button is visible in the bottom right corner.

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:

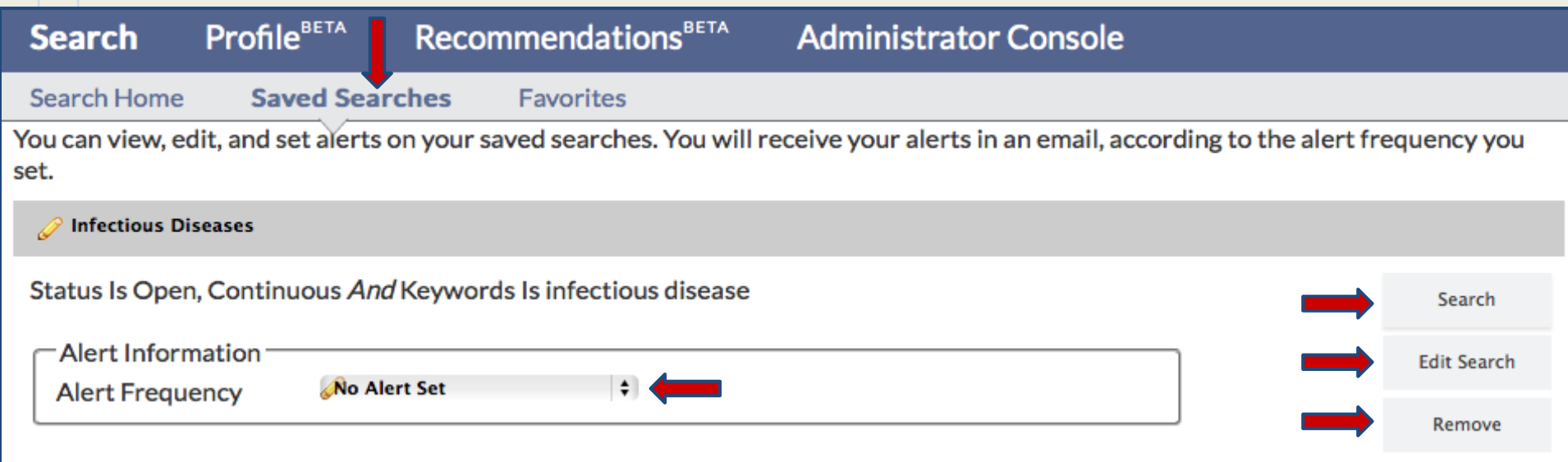
- Every Day
- Every Monday
- Every First Day of the Month

Here, users are able to name & save their search criterias for future use:

The screenshot shows a web application interface with a top navigation bar containing 'Search', 'Profile BETA', 'Recommendations BETA', and 'Administrator Console'. Below this is a sub-navigation bar with 'Search Home', 'Saved Searches', and 'Favorites'. The main content area is titled 'Keywords' and includes a 'search by' dropdown. A 'Categories' section has a 'Type category name' input and a 'Select' button. A 'Sponsors' section has a 'Type sponsor name' input and a 'Select' button. A 'Deadline' section is partially visible. A 'Found 0' status is shown. A 'Save your search' dialog box is open, featuring a 'Save search/alert' button highlighted with an orange box and a red arrow. The dialog box contains options to 'Update a previously saved search' (with a 'Select' dropdown), 'Save new search' (with a text input), and 'Add/Update alert period' (with a 'No Alert Set' dropdown). 'Save' and 'Cancel' buttons are at the bottom of the dialog. A 'Sort by' dropdown is set to 'Relevance'.

# 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:



**Search** Profile<sup>BETA</sup> Recommendations<sup>BETA</sup> Administrator Console



Search Home **Saved Searches** Favorites

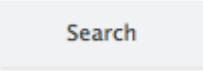
You can view, edit, and set alerts on your saved searches. You will receive your alerts in an email, according to the alert frequency you set.

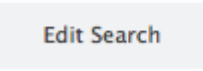
 Infectious Diseases

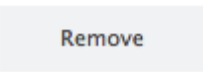
Status Is Open, Continuous *And* Keywords Is infectious disease

Alert Information

Alert Frequency  No Alert Set 

 Search

 Edit Search

 Remove

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.




# Saving Results

Search Home   Saved Searches   Favorites

Keywords   infectious disease   ?   

Advanced options +   [Clear All](#)


Found 1894 results in 0.15 seconds   Export    Save search/alert    Sort by   Relevance

**Categories**      Type category name   [Select](#)

**Sponsors**   

**31 March**

**SSI/ISID Fellowships**  
*International Society for Infectious Diseases*  
SID and the Swiss Society for **Infectious Diseases** recently announced the SSI/ISID **Infectious Diseases** Research Fellowship Program. The goal of this Fellowship Program is to support **infectious disease** physicians and



Click here to add this grant to your favorites.

Search Home   Saved Searches   **Favorites** 

**Jump to My Favorite Grants With Deadlines:**

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

To save result as a 'favorite,' click the star on the right. Favorites are organized by **time & deadlines**.

# Exporting your Search Results

Search Home   Saved Searches   Favorites

Keywords   infectious disease

Found 1894 results in 0.15 seconds

**Categories** –


Type category name   Select

**Sponsors** –

Type sponsor name   Select

**31**  
March  
2014

**SSI/ISID Fellowships**  
*International Society for Infectious Diseases*  
SID and the Swiss Society for Infectious Diseases (SSS) of this Fellowship Program is to support scientists from developing and multidisciplinary clinical ...

Export 

**Export**

Choose Format  
☒ CSV   ☐ PDF   ☐ TXT

Number of results to Export  
Top ☒ 10   ☐ 25   ☐ 50   ☐ 100

Fields to Export

- ☒ Title
- ☒ Status
- ☒ Description
- ☒ Source URL
- ☒ Sponsor
- ☒ Deadlines
- ☒ Eligibility
- ☒ Submission Info
- ☒ Limited Submission Info
- ☒ Cost Sharing
- ☒ Data Management
- ☒ Subject Areas
- ☒ Contacts
- ☒ Submit Date
- ☒ Modified Date
- ☒ Grant Forward URL

OK   Cancel

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)

# Options on the Funding Opportunity Page

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.'**

[Search Home](#) [Saved Searches](#) [Favorites](#)

[Back](#) [Annotate](#) [Favorite](#) [Export](#) [Collapse](#)

*This opportunity was added on June 25, 2012 and was last modified on July 31, 2012.*

 EXPIRED

## 2012 American Society for Cell Biology Annual Meeting Biotech Postdoc Award

Application Deadline: September 4, 2012

2012 American Society for Cell Biology Annual Meeting December 15-19, 2012  
San Francisco, California

This opportunity does not match any of the researchers at your institution

[Learn Why](#)

[Opportunity Source](#)

## 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.

# Link to the Opportunity Source

The screenshot shows a web interface with a top navigation bar containing 'Search Home', 'Saved Searches', and 'Favorites'. Below this is a toolbar with buttons for 'Back', 'Annotate', 'Favorite', 'Export', and 'Collapse'. A message states: 'This opportunity was added on June 25, 2012 and was last modified on July 31, 2012.' Below this is a red 'EXPIRED' badge. The main title is '2012 American Society for Cell Biology Annual Meeting Biotech Postdoc Award'. To the right of the title is a 'Collapse' link. Below the title is the 'Application Deadline: September 4, 2012'. At the bottom, it says '2012 American Society for Cell Biology Annual Meeting December 15-19, 2012 San Francisco, California'. On the right side, there is a message: 'This opportunity does not match any of the researchers at your institution' with a 'Learn Why' link. Below this is a red-bordered box containing the text 'Opportunity Source' with a right-pointing arrow. A large red arrow points up to this box.

Search Home Saved Searches Favorites

Back Annotate Favorite Export Collapse

This opportunity was added on June 25, 2012 and was last modified on July 31, 2012.

**EXPIRED**

## 2012 American Society for Cell Biology Annual Meeting Biotech Postdoc Award

[Collapse](#)

Application Deadline: September 4, 2012

2012 American Society for Cell Biology Annual Meeting December 15-19, 2012  
San Francisco, California

This opportunity does not match any of the researchers at your institution

[Learn Why](#)

**Opportunity Source** →

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](#).

