



Administrator Welcome Guide

Welcome to GrantForward!

You will go through the accommodating guidelines on how to help your members get the most out of GrantForward. You can also assist them better in the award-seeking process, as well as promote the research activities at your institution by taking advantage of our administrative features.

In this Administrator Guide, we will cover:

- ▶ Deploy GrantForward
- ▶ Admin Dashboard
- ▶ User Management
- ▶ Researcher's Profile Editor
- ▶ Grant Delivery
- ▶ Annotation
- ▶ Newsletters
- ▶ Internal Grant
- ▶ Usage Report
- ▶ Integration
- ▶ Grant Portals
- ▶ Account Creation and Recommendation Service

Deploy GrantForward

To get the most out of GrantForward, we've provided a few ways to help you better deploy the tool.

Link to GrantForward

Link to GrantForward from your Grant Office page (or Library Resources page), to ensure that members will find GrantForward when they are thinking about and looking for grants.

Embed Search Widget

Embedding the search widget box in your institution's website allows your members to search for grants at GrantForward right from your webpage.

Announce GrantForward

The email template includes summary information about GrantForward, how to log in, and a Welcome Guide for new users to learn about all the features of GrantForward.

Account Creation and Recommendation Service

Account creation service helps faculty members to easily access GrantForward and start receiving grant recommendations tailored to their research interests automatically.

Single Sign-On Integration

The Single Sign-On service via SAML authentication allows your members to log in to GrantForward using their institution accounts without having to create separate usernames/passwords on our site.



For more information, view our step-by-step guidance:

 **Deploy GrantForward**

Admin Dashboard

In addition to your personal homepage, you will have an admin homepage showing the overview of the search usage at your institution and records of other admin activities. Therefore, you will have an overall look at how active all users are using GrantForward and take action to increase the utilization of our system. You can go to the **Admin Dashboard** page under the **Administrator Console** tab.

Administrator Dashboard

Institution Settings
Region:
Regional Settings affects Search Interfaces and various default search settings on the system.

Search Usage 1072 searches over the last 7 days

Date	Searches
Jul 10	180
Jul 11	300
Jul 12	200
Jul 13	0
Jul 14	50
Jul 15	100
Jul 16	0

Grant Viewership 144 grants viewed over the last 7 days

Date	Grants Viewed
Jul 10	40
Jul 11	45
Jul 12	10
Jul 13	0
Jul 14	20
Jul 15	15
Jul 16	0

Recent Admin Activities

- Felix Le** has composed a Newsletter: **UNIVERSITY OF NEBRASKA AT OMAHA GRANT NEWSLETTER** %%full_date%%. 16 hours ago
- Serena Vu** has changed your Institution Region to **United States**. Jul 4, 2024
- Serena Vu** has created a new Curated Grant List: **UNR LSO**. Jul 1, 2024
- Serena Vu** has created a new Curated Grant List: **UNR Early**. Jul 1, 2024
- Serena Vu** has created a new Curated Grant List: **UNR BEMSA**. Jul 1, 2024

[View more activities](#)

User Management

You can manage your users in three categories, including **Individual**, **Unit**, and **Group**, to optimize communications and outreach in research activities and facilitate the delivery of grants and newsletters through systematic user management. Go to the **User Management** page under the **Administrator Console** tab.

Manage Individual Users

1 When choosing the **Manage Users** tab, you can view all accounts within your institution and search specific users through available filters such as name, email, unit, group, user type, or permission. There are three types of account permission:

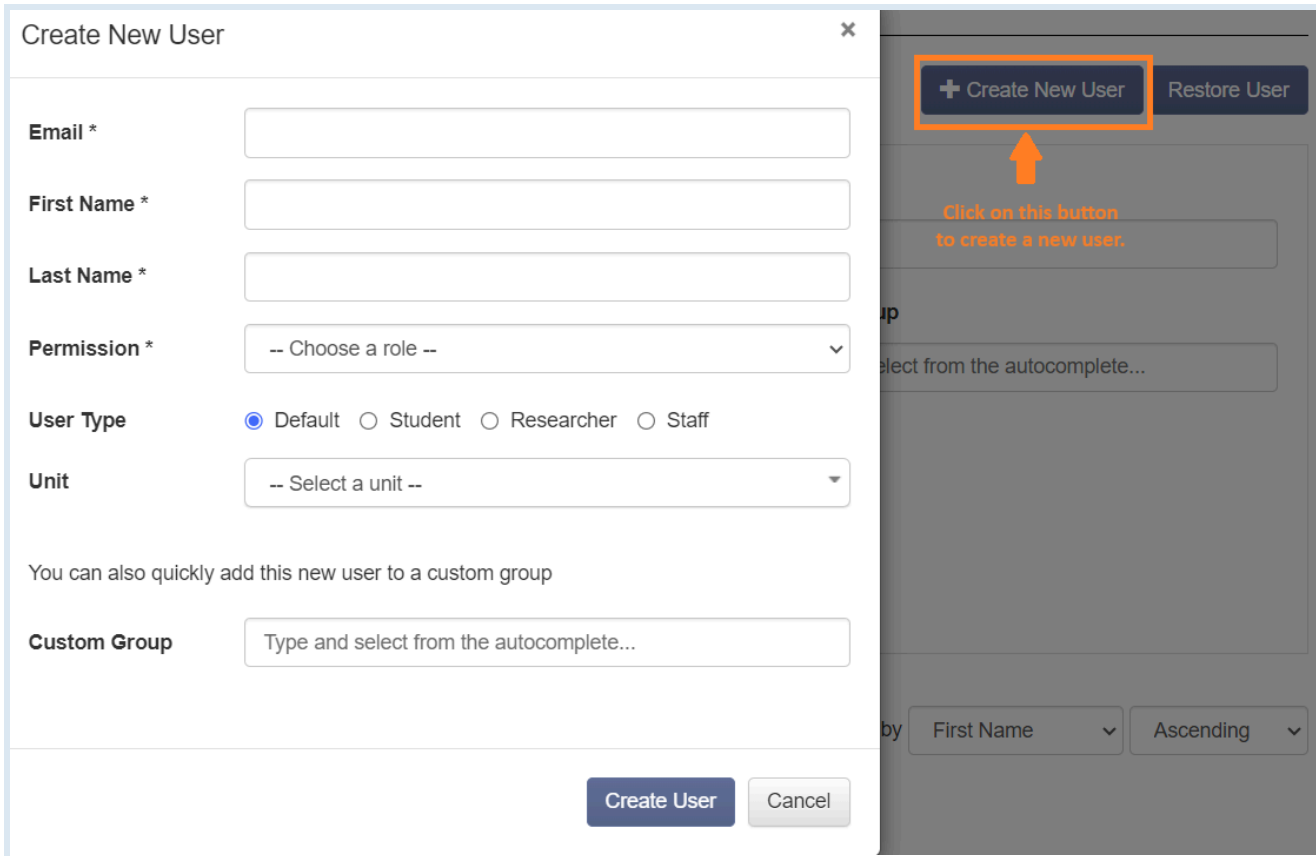
- **Member:** allows access to search functionality, profile creation, and basic features of GrantForward.
- **Administrator:** includes Member permissions, plus specific administrative functionality to manage users within assigned scope(s), as designated by the Master Administrator.
- **Master Administrator:** includes Member permissions, plus full administrative functionality under the Administrator Console tab to manage users across the entire institution.

The screenshot displays the 'Manage Users' interface. At the top, there are three tabs: 'Manage Users' (selected), 'Manage Institution Units', and 'Manage Custom Groups'. Below the tabs are two buttons: 'Hide Filters' and 'Reset Filters'. On the right side, there are two buttons: '+ Create New User' and 'Restore User'. The main area contains six search filters arranged in a 2x3 grid:

- First Name:** A text input field.
- Last Name:** A text input field.
- Email:** A text input field.
- Permission:** A dropdown menu with a search box containing the text 'Type and select from the permissions...'. The dropdown is open, showing three options: 'Master Administrator', 'Administrator', and 'Member'. This dropdown is highlighted with an orange border.
- Institution Unit:** A text input field with the placeholder text 'Search for an institution unit...'. A dropdown arrow is visible on the right side.
- Custom Group:** A text input field with the placeholder text 'Type and select from the autocomplete...'. A dropdown arrow is visible on the right side.

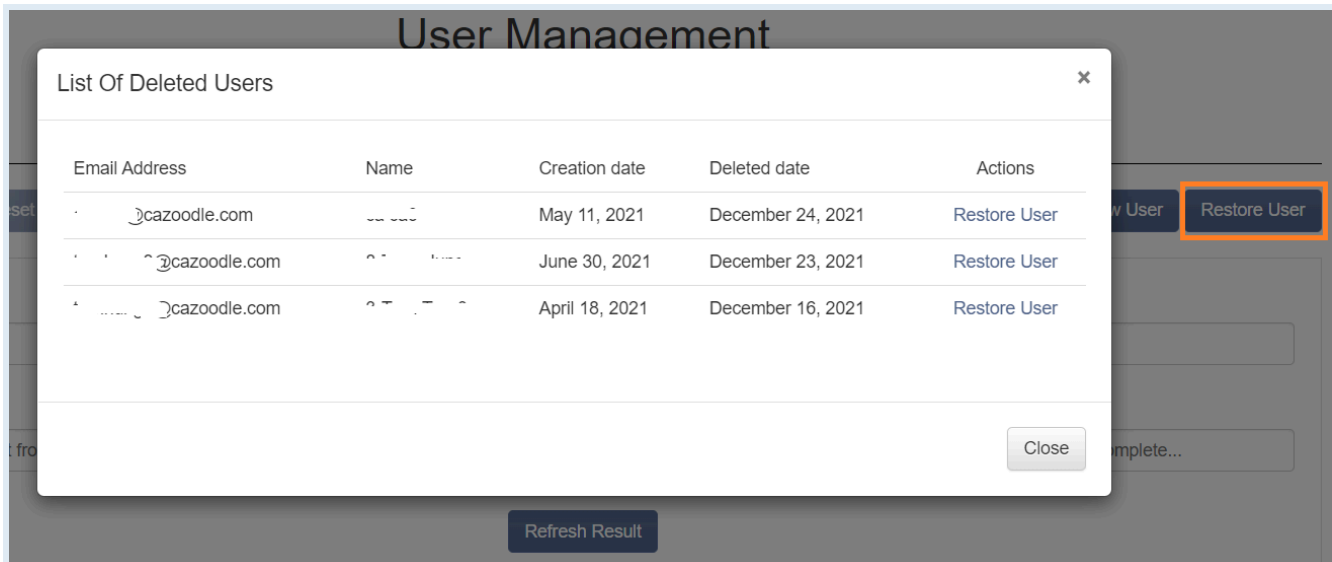
2

Click on the **Create New Users** button, set their account permission, and select a proper unit or some suitable groups for them. After creation, these users will be notified of their account credentials via email to log in to GrantForward.



3

You can also restore those members who were removed by mistake. Just click on the **Restore User** button and choose a user. The data of those accounts will remain intact after being restored.



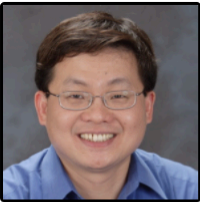
4

Select **Perform Admin Actions** in the corresponding row of a user to edit that user's account information, view/edit their personal grant recommendations, change permission, reset the password, transfer their admin work to another (if the account is Administrator/ Master Administrator), or delete a user who is no longer with your institution.

Name	Email Address	Institution Unit	Permission	User Type	Signed Up Date	Last Logged In Date	
			Master Administrator	Default	July 31, 2014	October 02, 2020	<ul style="list-style-type: none"> Edit User Information Edit Recommendation Edit Permission Reset Password Admin Work Transferring Delete User
		College of Veterinary Medicine	Master Administrator	Researcher	June 10, 2020	May 16, 2021	<ul style="list-style-type: none"> View Details Perform Admin Actions
		Computer Science	Master Administrator	Default	June 12, 2013	August 07, 2025	

5

When clicking on **View Details** of a user, you will view his/her information and usage insights on GrantForward.



Kevin Chang

- kcchang@illinois.edu
- Administrator
- Member of Computer Science
- Joined since June 12, 2013
- Profile at <https://www.grantforward.com/KevinChang.13>

Usage Statistic | **Grant Delivery Results**

Website Usage

Statistic	Last 7 Days	All Time
Searches Made	0	7630
Grant Delivery Viewed	0	0

Number of Saved Searches	22
Daily Email Delivery	2
Weekly Email Delivery	20
Monthly Email Delivery	0

Manage Institution Units (only available for Master Administrators)

1 On the **Manage Institution Units** tab, choose **Take me to Cazoodle Institution Management** to start managing your institution units. You can view the full hierarchy of all units at your institution. Any master administrators can view any levels of the hierarchy and make changes to them.

The screenshot shows the 'Manage Units' tab in a web application. At the top, there are navigation links for 'Home', 'Manage Users', and 'Manage Units'. Below the navigation, there is a message: 'Administrators can set up their institution units here. Unit members will benefit from every grant delivery which has been set up for that unit. Note: It might take 30 seconds to 1 minute for the institution structure to reflect fully on other administrative features.'

The main content area displays a hierarchy of units for the 'University of Illinois Urbana-Champaign Institution'. The units listed are: Advancement, Beckman Institute, Carl Woese Institute for Genomic Biology, and Carle Illinois College of Medicine. Under Carle Illinois College of Medicine, there are sub-units: Biomedical and Translational Sciences and Clinical Sciences.

On the right side, there is a 'View Options' dropdown menu and a 'Manage Mailing List' button. The 'View Options' menu is open, showing options: 'View to Level 1 Units', 'View to Level 2 Units', 'View to Level 3 Units', and 'View Full Hierarchy'. An orange arrow points to the 'View Options' button with the text: 'Click on this button to choose which level of unit you want to see'.

2 You can add new units or rename (**press Enter to save changes**), delete, move, or merge existing units by clicking on a unit's name. Each member can benefit from the grants delivered to their units by administrators.

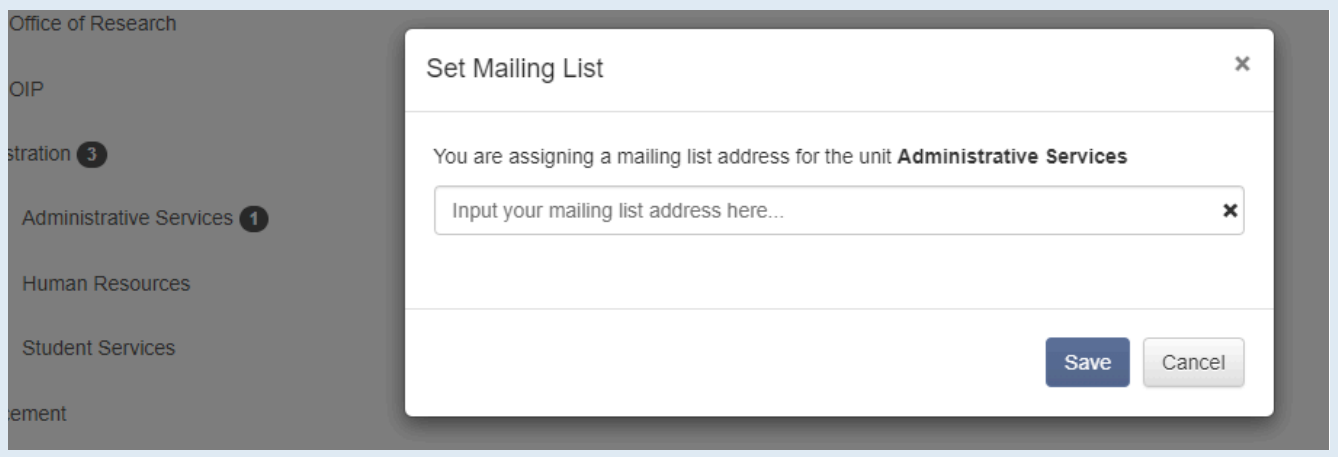
The screenshot shows a detailed view of a unit hierarchy. The units listed are: Administration, Administrative Services, Financial Management, Human Resources, Student Services, Advancement, Advertising, and Aerospace Engineering.

An orange arrow points to the '+' and '-' icons next to 'Administrative Services' with the text: 'Click on "+" or "-" to display/hide a subunit.'

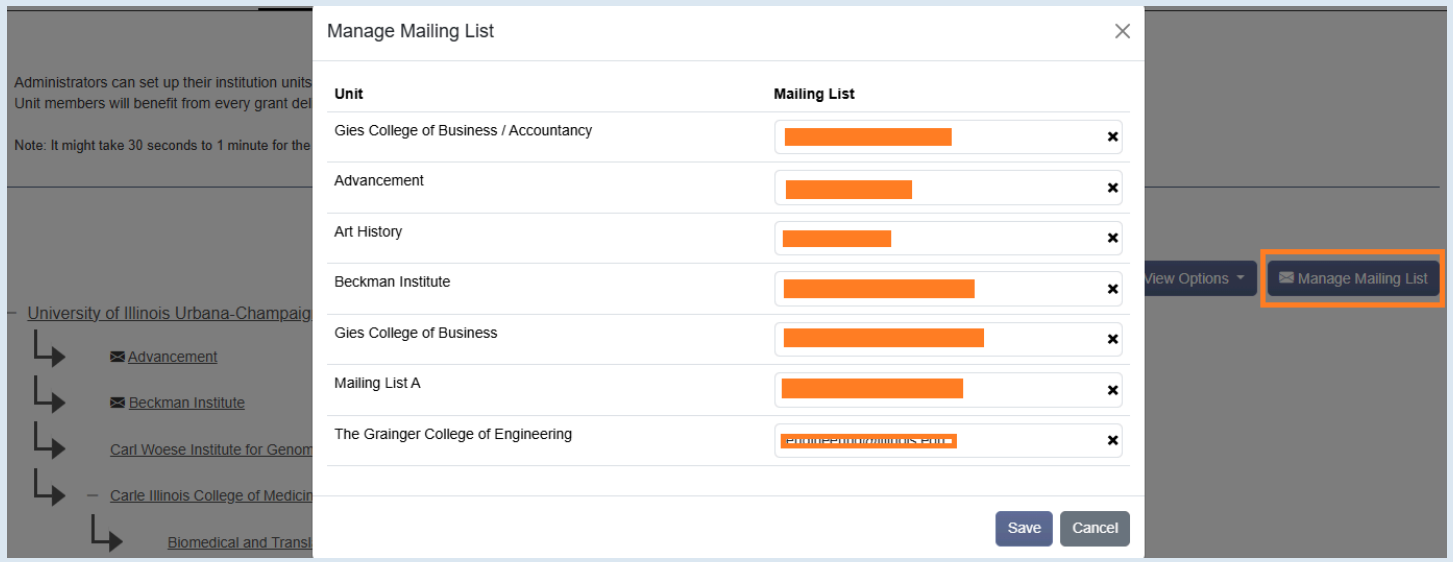
A context menu is open over the 'Financial Management' unit, showing options: 'Create New Unit within ...', 'Rename Unit', 'Move this Unit to ...', 'Merge this Unit with ...', 'Delete this Unit', and 'Set Mailing List'. An orange arrow points to the 'Financial Management' unit with the text: 'Click on a unit's name to perform more actions.'

3

You can assign a mailing list to an individual unit so that when you share a search template or a newsletter with that unit, all users affiliated with the mailing list will receive it and be able to access disseminated grants, even when they are not GrantForward users.



You are also able to manage all the mailing lists created within your institution, such as edit or delete any of them.



Manage Custom Groups

- 1 When choosing the **Manage Custom Groups** tab, you will view all groups created within your institution with their information.

The screenshot shows the 'Manage Custom Groups' interface. At the top, there are three tabs: 'Manage Users', 'Manage Institution Units', and 'Manage Custom Groups'. A '+ Create New Custom Group' button is located in the top right corner. Below the tabs, there are two group cards. The first card is for 'Big Data Faculty (3)' with a 'Private' status. It shows three member avatars labeled 'JT', 'SV', and 'FL'. Below the avatars are three buttons: 'Edit Group Info', 'Manage Members', and 'Ownership Sharing'. A 'Delete Group' button is in the bottom right corner of the card. The second card is for 'Education Faculty (1)' with a 'Public' status. It includes a description: 'Join this group to receive funding information on education' and one member avatar labeled 'SV'. It also has 'Edit Group Info', 'Manage Members', and 'Ownership Sharing' buttons, and a 'Delete Group' button in the bottom right corner.

- 2 You can create a new group by clicking on the **Create New Custom Group** button and then adding any members you want.

The screenshot shows the 'Create New Custom Group' dialog box overlaid on the background interface. The dialog box has a title bar with a close button. It contains the following fields and options: 'Group Name *' with a text input field; 'Description' with a larger text area; and 'Visibility' with two radio buttons: 'Public' (selected) and 'Private'. Below the radio buttons, a note states: 'Everyone in your institution will be able to see and join this group'. At the bottom of the dialog are 'Save' and 'Close' buttons. In the background, the '+ Create New Custom Group' button is highlighted with an orange box and an orange arrow. Below the arrow, text reads: 'Click on this button to create a new group.' Other background elements include a 'Delete Group' button and the words 'Public' and 'Private'.

3

When clicking on the **Manage Members** button, you will be able to add or remove members in groups. You can also edit that group information, delete, or share the ownership of the custom group. These actions can be performed not only with your groups but also with groups of other administrators.

The screenshot shows two group management panels. The top panel is for 'Big Data Faculty (3)' with a 'Private' visibility setting. It features a member list with initials JT, SV, and FL. Below the list are buttons for 'Edit Group Info', 'Manage Members', and 'Ownership Sharing', along with a 'Delete Group' button. The bottom panel is for 'Education Faculty (1)' with a 'Public' visibility setting. It shows a single member SV and buttons for 'Edit Group Info', 'Manage Members', 'Ownership Sharing', and 'Delete Group'. Annotations with arrows point to these elements: 'Member list of a group' points to the member list; 'Click this button to add/ remove members' points to 'Manage Members'; 'Click this button to edit group information' points to 'Edit Group Info'; 'Click this button to share the ownership of the group' points to 'Ownership Sharing'; and 'Click this button to delete a group' points to 'Delete Group'.

4

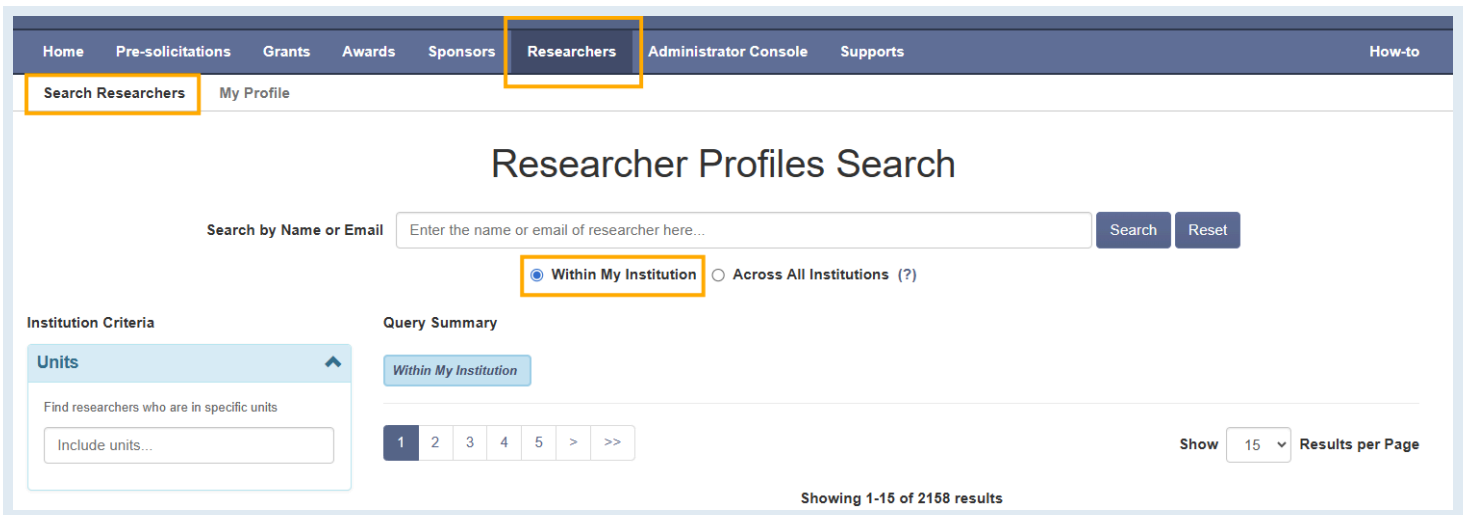
Your members can also opt to join your public groups on their own to benefit from any grant information shared with those groups. Their group information will be displayed in the **User Groups** tab on their homepage.

The screenshot shows the 'User Groups' tab in a navigation menu. Below the menu, it says 'You are currently a member of the following groups:'. A 'Join a Group' button is highlighted with an orange box and an arrow pointing to it with the text 'Click on this button to join a public group.'. Below this is a group card for 'Biology Grants (3)' created by Farzaneh Masoud, with a 'Private' visibility setting. The group card lists members KC, AT, and HG. At the bottom right of the group card, a 'Leave Group' button is highlighted with an orange box and an arrow pointing to it with the text 'Click on this button to leave a group.'.

Researcher's Profile Editor

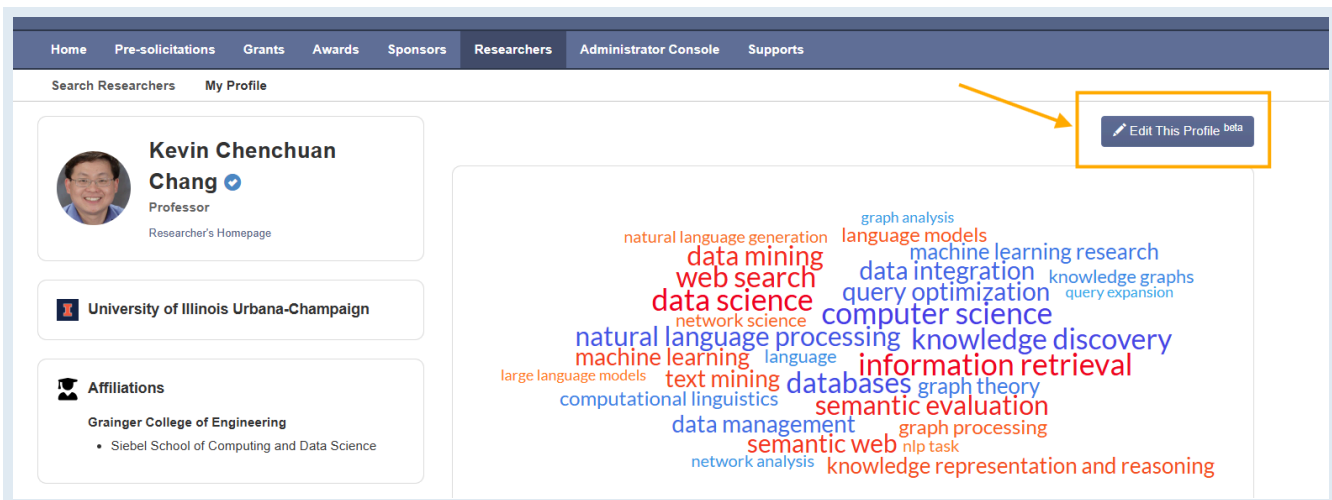
As the Master Administrator of your institution, you can also edit your researcher profile on their behalf.

- 1 Go to the **Search Researchers** tab under the **Researchers** section, and make sure that you are viewing profiles within your own institution, then click on any profile you would like to edit.



The screenshot shows the 'Researcher Profiles Search' page. The navigation bar includes 'Home', 'Pre-solicitations', 'Grants', 'Awards', 'Sponsors', 'Researchers', 'Administrator Console', 'Supports', and 'How-to'. The 'Search Researchers' tab is highlighted. Below the navigation bar, there is a search input field labeled 'Search by Name or Email' with a placeholder 'Enter the name or email of researcher here...'. To the right of the input field are 'Search' and 'Reset' buttons. Below the input field, there are two radio buttons: 'Within My Institution' (selected) and 'Across All Institutions (?)'. On the left side, there is a section titled 'Institution Criteria' with a sub-section 'Units' and a text input field 'Include units...'. On the right side, there is a 'Query Summary' section with a button 'Within My Institution' and a pagination control showing '1 2 3 4 5 > >>'. At the bottom right, there is a 'Show 15 Results per Page' dropdown. At the bottom center, it says 'Showing 1-15 of 2158 results'.

- 2 While on the Researcher's Profile page, click on the **Edit This Profile** button to access the editor tool and make any changes necessary. Information will be updated accordingly within a few minutes.



The screenshot shows the 'Researcher's Profile' page for Kevin Chenchuan Chang. The navigation bar is the same as in the previous screenshot. The 'Search Researchers' tab is highlighted. The profile page has a header 'Search Researchers My Profile'. On the left side, there is a profile card for Kevin Chenchuan Chang, Professor, with a photo and a 'Researcher's Homepage' link. Below the profile card, there is a section for 'University of Illinois Urbana-Champaign' and a section for 'Affiliations' including 'Grainger College of Engineering' and 'Siebel School of Computing and Data Science'. On the right side, there is a large word cloud of research topics. An orange arrow points to a button labeled 'Edit This Profile beta' in the top right corner of the profile page.

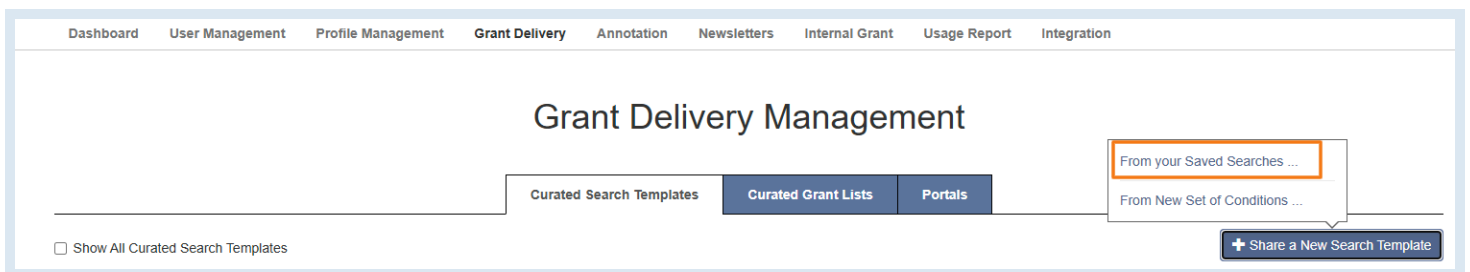
Grant Delivery

You will be able to share search templates or grant lists in specific research areas with suitable members. Taking advantage of the grant delivery features will help your faculty save time in seeking matching grants. You can select the **Grant Delivery** page under the **Administrator Console** tab.

Curated Search Templates

(Sharing a curated search template means sharing the search you have set up. The recipient will be able to view all the keywords, filters you applied, and the results yielded from your search. You can also set up search alerts for your members when sharing the curated search template.)

1 On the **Curated Search Templates** tab, click on the **Share a New Search Template** button, and choose **From your Saved Searches**.



Note: Make sure you already have a saved search. If you haven't had one, please visit this document for step-by-step instructions: [Monitor and Get Alerts for New Grant Opportunities](#).

2 Choose your available saved searches and select **Save and Add Recipients** to set up the sharing settings.

3 After creating a search template and adding recipients with email delivery settings, you can edit search conditions in the **Search Condition** tab, add more recipients, and change the email delivery frequency in the **Recipients Setup** tab, or remove that search template.

You can also share the ownership of your search template on the **Ownership Sharing** tab, so other members of your team can work on it.

HSI Funding

Search Condition Recipients Setup Embed Ownership Sharing

View and make changes to the current recipients and email delivery settings

Shared and will send email every week to the following members:
Serena Vu <serena.v@illinois.edu>

Last Delivery Edit Delete

Add New Recipients Remove Search Template

4 Each user who is the targeted recipient of your search templates will be able to view the grant results with full conditions at the **Institutions Updates** tab on his/her homepage or receive email alerts if you set up email delivery. When viewing a grant, the recipients can send feedback about this grant delivery by marking it as interested or not interested.

Institution Updates Personal Updates User Groups

Activity Feeds
Curated Search Templates
Curated Grant Lists

3Tran- WildLife
Annotated Grant List
Big Data
Big data
Biology Opportunities
CFDA
Fellowships
Humanities Opps

Big Data
This list is available to you because you are a member of **Humanity Faculty**

Found 3 results in 0.41 seconds. Sort by Title

« Previous Layout: Next »

B.16 Heliophysics Artificial Intelligence/Machine Learning-Ready Data 23 Jan, 2025

National Aeronautics and Space Administration
Funding Opportunity Number: NNH24ZDA001N-HARD

B.16 Heliophysics Artificial Intelligence/Machine Learning-Ready Data

This opportunity was added on February 21, 2023 and was last checked on May 03, 2024.

Annotate Export Favorite Share Add to List

This grant belongs to the curated grant list **Big Data**

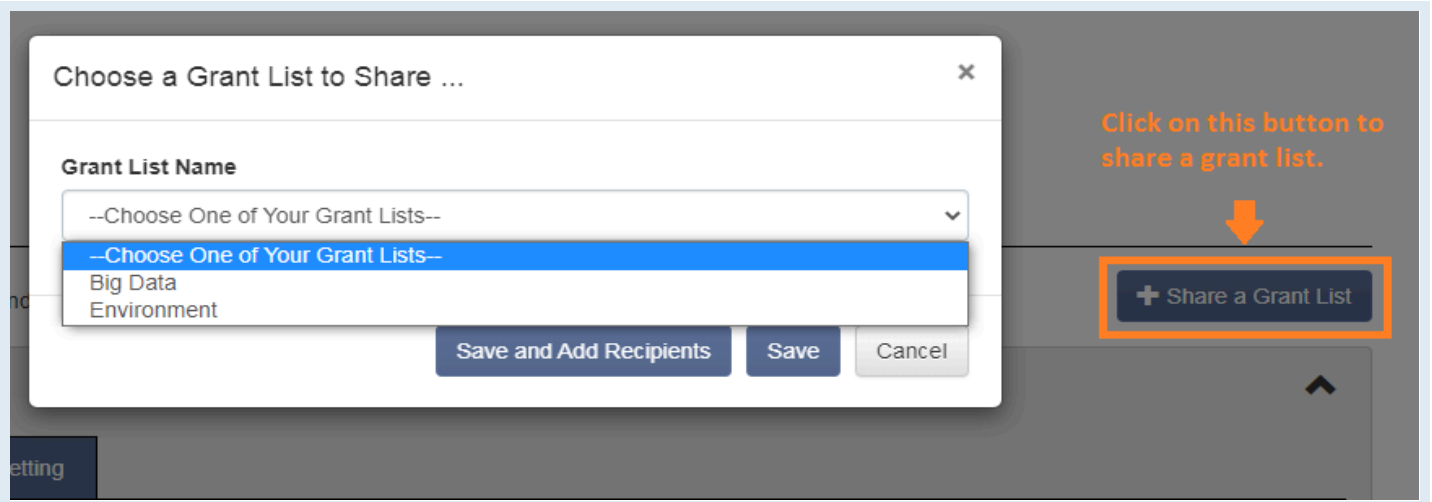
You can give feedback about the grant delivery assistance from your Administrators

Interested Not interested No feedback

Curated Grant Lists

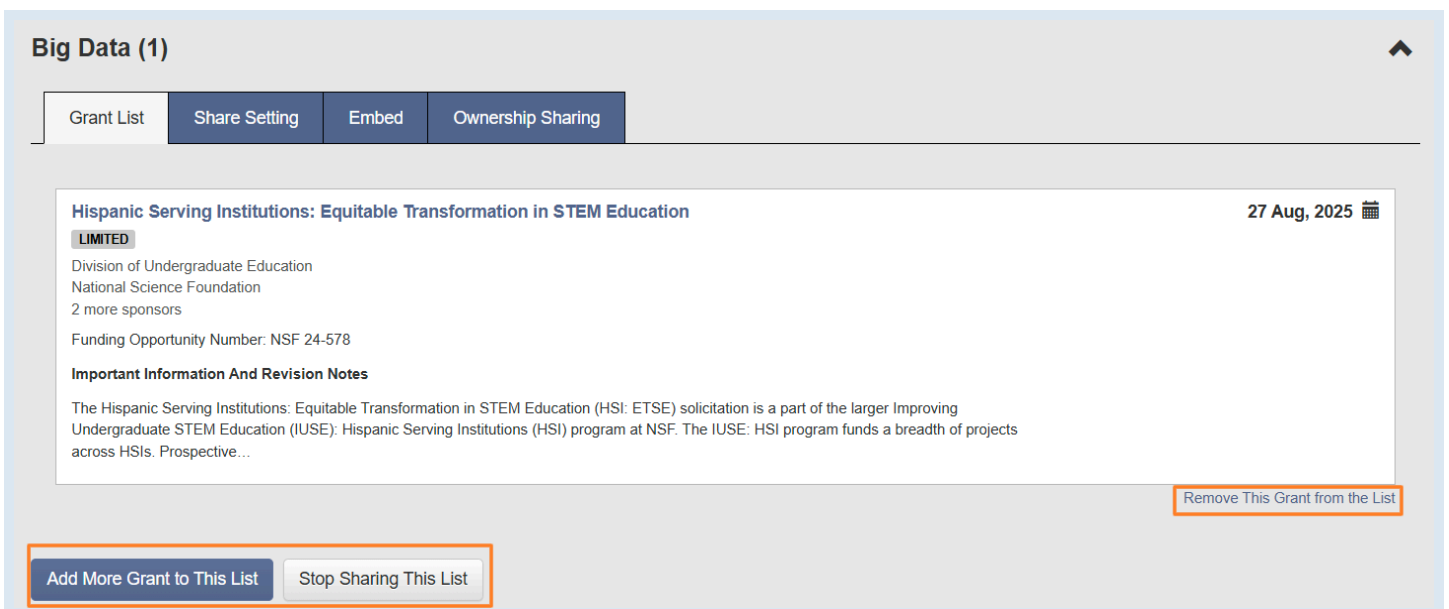
1

After choosing the **Curated Grant Lists** tab, you can share a list of manually selected grants with other members within your institution. You will need to have the available grant lists in advance.



2

When clicking on the **Add More Grants to This List** button, you will be redirected to the Search page and can add desired grants to the list, then they will be automatically added to the corresponding curated grant lists. Any grants can also be removed from their list and any lists can be deleted to stop sharing with the recipients.



3

You can share a curated grant list with individuals/units/groups within your institution.

The screenshot shows a user interface for a grant list titled "Big Data (1)". At the top, there are four tabs: "Grant List", "Share Setting", "Embed", and "Ownership Sharing". Below the tabs, a message states: "This list of grants is currently shared with the following recipients:". Underneath, there is a section labeled "Individuals" containing a recipient card for "Felix Le <felix.l@illinois.edu>". Below the recipient card is a "Clear Recipients" link. At the bottom of the interface, there are two buttons: "Add New Recipients" and "Stop Sharing This List".

4

GrantForward also allows you to share the ownership of any curated grant lists so you can collaborate with others by choosing the setting on the **Ownership Sharing** tab.

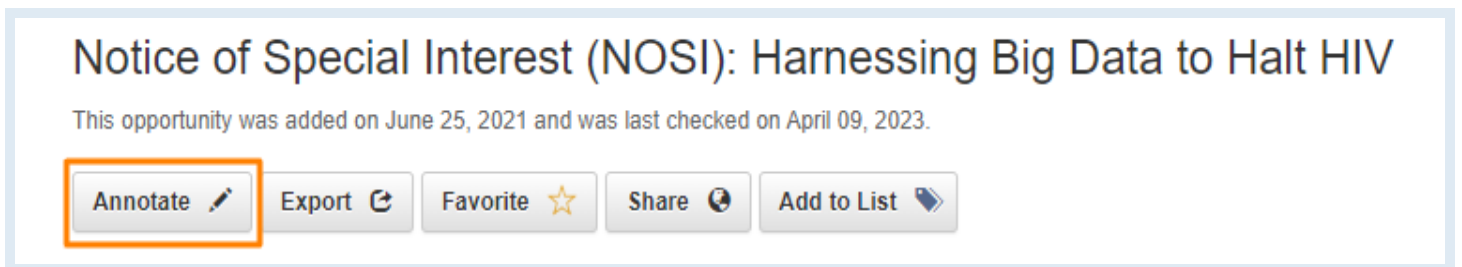
5

The recipients can view these grants directly at the **Institution Updates** tab on their personalized homepages. They can send feedback about a grant by marking it as interested/not interested on the grant detail page.

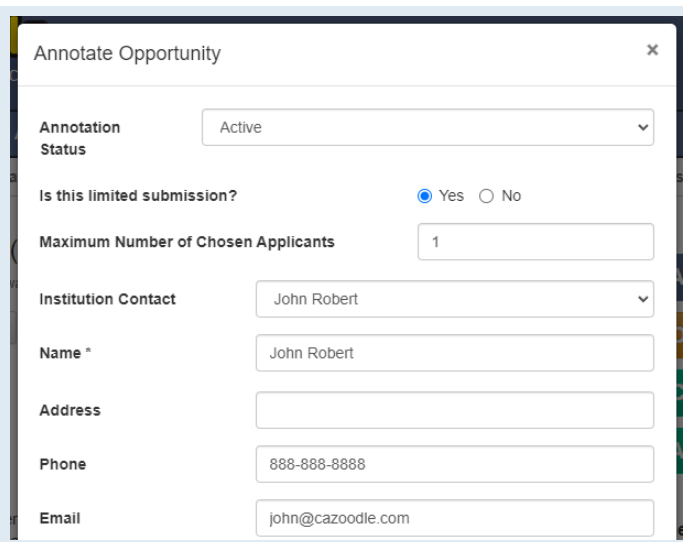
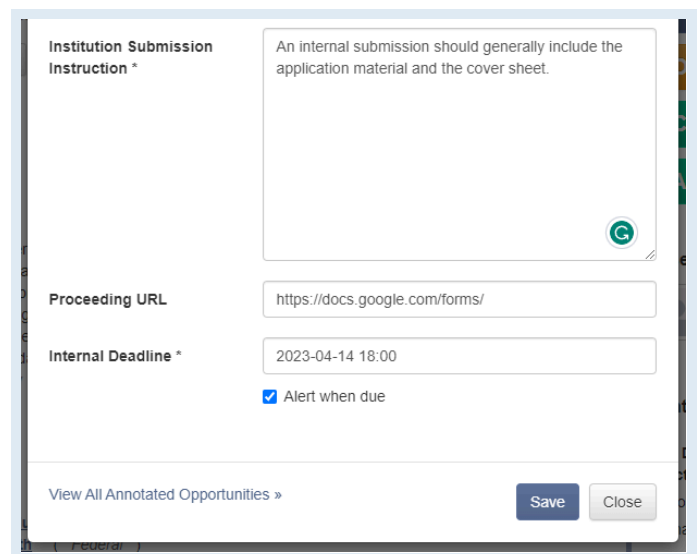
Annotation

You will have the ability to create annotations on grant opportunities to make your members notice the institutional information such as limited submission instructions or internal deadlines.

- 1 When viewing a funding opportunity, there will be an option **Annotate** under the title of that grant. Only administrators can see and manipulate this feature.



- 2 By clicking on the **Annotate** button, there is a pop-up where you can add additional information, then every user within your institution will be able to see your annotation when viewing that grant.

A screenshot of the "Annotate Opportunity" form. The form has a title bar with "Annotate Opportunity" and a close button. The fields are: "Annotation Status" (dropdown menu set to "Active"), "Is this limited submission?" (radio buttons for "Yes" and "No", with "Yes" selected), "Maximum Number of Chosen Applicants" (input field with "1"), "Institution Contact" (dropdown menu with "John Robert"), "Name *" (input field with "John Robert"), "Address" (empty input field), "Phone" (input field with "888-888-8888"), and "Email" (input field with "john@cazoodle.com").A screenshot of the "Institution Submission Instruction" form. The form has a title bar with "Institution Submission Instruction" and a close button. The fields are: "Institution Submission Instruction *" (text area with "An internal submission should generally include the application material and the cover sheet."), "Proceeding URL" (input field with "https://docs.google.com/forms/"), "Internal Deadline *" (input field with "2023-04-14 18:00"), and "Alert when due" (checkbox checked). At the bottom, there is a "View All Annotated Opportunities >" link and "Save" and "Close" buttons.

- If you enter the **Proceeding URL** in the annotation record, your members will see an **Internal Submission URL** button on the annotated grant detail page. By clicking on that button, they will be redirected to the internal page where they can submit the applications for the internal selection.

Notice of Special Interest (NOSI): Harnessing Big Data to Halt HIV

This opportunity was added on June 25, 2021 and was last checked on April 09, 2023.

[Annotate](#)
[Export](#)
[Favorite](#)
[Share](#)
[Add to List](#)

Big Data ✕

Description

Notice Number: NOT-AI-21-054

[Internal Submission URL *](#)
 (*) Exclusively available for members of Cazoodle

[Application URL](#)

[Opportunity Source](#)

- On the **Internal Submission** page under the **Grants** tab, institution members will view all annotated grants. They will be aware of all limited funding opportunities and be able to select the potentially eligible grants to submit an application for the internal competition.

Internal Grants and Limited Submissions

This content is exclusive to University of Illinois Urbana-Champaign.

Reset Filters

Show 1-14 out of 14 results

Show 20 Items per Page Sort by Internal Deadline

Ascending

Title	Sponsor	Amount	Sponsor Deadline	Internal Deadline	Submission
Health Equity Research Network (HERN) on Community-Driven Research Approaches - Partner Hub	American Heart Association	To \$5,000,000	May 14, 2024	Mar 30, 2024	Submit
Outreach and Assistance for Socially Disadvantaged and Veteran Farmers and Ranchers (2501 Program)	Office of Partnerships and Public Engagement U.S. Department of Agriculture	From \$250,000 To \$750,000	Jul 05, 2024	Jun 20, 2024	Submit
Developmental Centers for AIDS Research (P30 Clinical Trial Not Allowed)	Eunice Kennedy Shriver National Institute of Child Health and Human Development Fogarty International Center 13 more sponsors	See Detail	Aug 04, 2025	Jul 20, 2024	Submit
SBIR E-Learning for HAZMAT and Emergency Response (R43/R44 Clinical Trial Not Allowed)	National Institute of Environmental Health Sciences National Institutes of Health 1 more sponsor	See Detail	Jul 26, 2024	Jul 31, 2024	Submit
Northwestern Memorial Hospital PGY2 Residency Program - Oncology	Northwestern Medicine	To \$52,000	Jan 02, 2025	Aug 15, 2024	Submit

3

Go to the **Annotation** page under the **Administrator Console** to view all annotated opportunities. You can click on a grant and edit its annotation.

Annotation Management

In this console, you can annotate funding opportunities with your institution-specific information. For example, you can annotate limited submission opportunities with your institution's internal submission instruction and deadline.

Hide Annotation Filters

Reset Annotation Filters

Manage Institution Grant Notice

Manage Contacts ^{new!}

Find Opportunities to Annotate

Search By Grant Title

Search By Annotator

Search By Status

Active Archived

Search By Annotated Date

to

Search By Internal Deadline

to

Refresh Result

1 2 3 > >>

Show 10

Results per Page Sorted by

Annotated Date

Descending

Showing 1 to 10 of 29 results.

Title	Sponsor	Original Deadline Status	Annotation Status	Annotator	Last Annotated	Internal Deadline	Contact	Acceptances	Actions
Notice of Special Interest (NOSI): Harnessing Big Data to Halt HIV Notice Number: NOT-AI-21-054 Purpose The purpose of this Notice of Special Interest...	National Institute Of Mental Health National Institute Of Allergy And Infectious Diseases	Open	Active	Lynn Nguyen	Apr 10, 2023	Apr 14, 2023	John Robert <john@cazoodle.com>	1	Edit

4

To create an institution annotation that appears on every grant browsed by your institution members, click on the **Manage Institution Grant Notice** button. You just need to add information at once, instead of having to annotate each grant.

Manage Institution Annotation

Institution Annotation will appear on every grant browsed by your institution members. You can use this to add information to every grant at once, instead of having to annotate each grant.

Section Title

Content

Contact

Alex Z

Name

Address

Phone

Email

Save Close

Newsletters

The newsletter is a handy tool to distribute grants among your institution's members. It allows administrators to easily broadcast news or announcements by convenient content drafting and to flexibly disseminate grant lists to any type of recipient. You can go to the **Newsletters** page under the **Administrator Console** tab.

Series

A series is a template that helps you quickly create a newsletter with pre-formatted content and settings, instead of creating a new one with the same format over and over again. Therefore, it saves your time and effort in formatting and producing newsletters, so that you can focus on other tasks.

1

In the **Series** tab, you will view all the series within your institution. You have the ability to create a new series or edit, clone, remove the series, or share it with others, so they can utilize it as well.

The screenshot displays the "Newsletter Management" interface. At the top, there are two tabs: "Newsletters" (selected) and "Series". Below the tabs, there is a descriptive text: "Newsletters can be grouped and created quickly via using Newsletter Series feature. You can fully control how the newsletter will look like and which audience to be sent to by default." A note below states: "Note: Your newsletter content should comply with **accessibility standards**." On the right side, there is a call to action: "Click on this button to create a series" with an orange arrow pointing to a blue button labeled "+ Create a Series". Below this, there is a list of newsletter series. The first series is "Office of Research" with actions: "More Details", "Clone", "Edit", "Embed", "Share", and "Delete". The second series is "Office of Research Newsletter" with the same set of actions.

2

You can create a new series with the necessary information or clone an existing one and edit its contents and default recipients.

Back to Series Management » Create a Series

Click on this button to clone and edit an existing series.



Clone an Existing Series...

Series Information

Series Name

Office of Research

Description (optional)

This series of newsletter is created and disseminated by the Office of Research in the College of Engineering.

- You can modify the subject and content of the newsletter template on your own or choose an available boilerplate. You can also edit and preview your content at the same time for easier customization.

Content Template

Pre-generate your series content to reuse quickly in subsequent issues. You can add *Variables* that can later on be replaced with each recipient's information.

Subject

Newsletter for UIUC in %%month%%

Add Variable ▾

Content

Load a Boilerplate...



Choose an available boilerplate and make customizations.

Choose a mode to show full editor, full preview or side-by-side editor.



Edit View Insert Format Table

↶ ↷ **B** *I* U ~~S~~ System Font 12pt Paragraph Add Variable ▾

%%full_date%%



%%unit%%

Newsletter

- The Grant Template can also be customized to appear nicely when you insert your grant lists into your newsletter. We have provided some boilerplates, also edit, and preview modes to make it convenient for you to design the grant template.

Newsletters

1 By choosing the **Newsletters** tab, you can view the newsletters created within your institution and search specific ones by available filters.

Newsletter Management

Newsletters Series

Hide Filters Reset Filters [+ Create a Newsletter](#)

Newsletter Title

Author

Created Between
 and

Sent Between
 and

Sent To

Newsletter Series
No Specific Series

[Refresh Result](#)

1 Show 15 Results per Page Sorted by Created Date Descending

Showing 1 to 15 of 15 results.

2 The list of newsletters with their information will be displayed, and you can also perform some actions on each newsletter.

Title	Author	Created Date	Last Sent	Useful/Not Useful	Action
Grant News Weekly %day_of_week% %full_date%	Alex Chang	Mar 07, 2025	Mar 08, 2025	0 0	Preview Edit Test Send Send Sending Log Embed Share Delete
Monthly Funding Newsletter for %full_name% - %full_date%	Jenny Tran	Mar 05, 2025	Not sent yet	0 0	Preview Edit Test Send Send Sending Log Embed Share Delete
Weekly Funding Opportunities %day_of_week%	Lucy Nguyen	Mar 04, 2025	Not sent yet	0 0	Preview Edit Test Send Send Sending Log Embed Share Delete
Monthly Newsletter for Health Sciences Department %month%, %year%	Jenny Tran	Mar 03, 2025	Not sent yet	0 0	Preview Edit Test Send Send Sending Log Embed Share Delete

3 Click on the **Create a Newsletter** button in the top right corner to start modifying your newsletter as you wish.

- If there are available newsletter series, you can choose one of them to load a template with available content and recipient settings into your

newsletter quickly.

Create a Newsletter

Newsletter Series

← Back to Newsletter Management

Newsletter Series
No Specific Series ▼

← Choose a series to load available title, content template, grant template, and recipient setups.

Warning: the current content will be wiped when you load a new series.

- Your grant list can be inserted into your newsletter content to disseminate to your members. (Remember to build your list of funding opportunities first)

Newsletter Title

Limited Submission Opportunities - %%month%% - %%year%% - %%unit%%

Add Variable ▼

↑ Add Variables that can be later on replaced with each recipient's information.

Add a Grant List

Select a Grant List

 ← **Attach your grant list to the newsletter.**
The grant content will be inserted at your current edit cursor.

Newsletter Content

Edit View Insert Format Table

↶ ↷ **B** *I* U ~~S~~ System Font 12pt Paragraph ≡ ≡ ≡ ≡ ≡ ≡ ≡ ≡

A 🖌 ℱ Ω 🖼 Add Variable ▼

NEW OPPORTUNITY

Terra Foundation for American Art - Exhibition Grant

Sponsored by: [Terra Foundation for American Art](#)

Deadline: May 14, 2021

Amount: How much money should I request? Is there an average grant amount? - Terra Foundation grant size varies by program area and by project.

Recognizing the importance of experiencing original works of art firsthand, the Terra Foundation supports exhibitions that increase the understanding and

4

After completing the content, you can preview it and then save it for sending later or save and add recipients to send immediately. The newsletter can be scheduled to be published at a time that is convenient for you and other recipients.

Newsletter Content

Edit View Insert Format Table

← → **B** *I* U ~~S~~ Tahoma 18pt Paragraph

Add Variable

Newsletter

Everyweek, the %unit% compiles a newsletter of research funding opportunities and shares it with the faculty and staff.

The newsletter is powered by GrantForward, a Funding Opportunity Search Engine and Recommendation Service. Institution members can sign up for an account, create a profile and set up saved searches to receive alerts and grant recommendations.

Have a question?

GrantForward

DIV » DIV » P » SPAN » STRONG » SPAN

259 WORDS POWERED BY TINY

Preview Save Newsletter and Send Save Newsletter Only Reset

Activate V

5

The newsletter will be sent to recipients' email addresses and also be displayed at the **Institution Updates** tab on the recipients' homepages. They can give feedback (useful or not useful) about that newsletter to administrators.

Institution Updates Personal Updates User Groups

These are all the newsletters that you are eligible to access currently.

Title	Author	Created Date	Last Sent
UTA Research Development 2021 June	Kevin Chang	June 03, 2021	June 10, 2021

Activity Feeds

Search Templates

Curated Grant Lists

Newsletters

Currently Active

Previously Received

Internal Grant

You can now create and manage internal grants on GrantForward and then promote them to institution members.

1 Go to the [Internal Grant](#) page under the Administrator Console tab. You can search for previously added internal grants through **Grant Title**, **Submitter**, or **Submit Date**.

Internal Grant Management

[Hide Filters](#) [Reset Filters](#) [Submit New Internal Grant](#)

Title **Submitter**

Submit Date to [Refresh Result](#)

1 Show Results per Page Sorted by

Showing 1-1 out of 1 result

Title	Submitter	Submit Date	Last Modified Date	Status	Action
Funding Opportunities for Illinois Faculty	Lucy Nguyen	Mar 13, 2025	Mar 13, 2025	Continuous	Edit Share Delete

2 Click on **Submit New Internal Grant**, you need to fill in the information in four sections listed: **Basic Info**, **Amount**, **Eligibility**, and **Submission** to detail the grant.

Submit an Internal Grant

[← Back to Internal Grant Management](#)

1. Basic Info **2. Amount** **3. Eligibility** **4. Submission**

Grant Title *

Description *

3

Internal grants are searchable and viewable for only members within your institution. All internal grants and annotated funding opportunities are displayed on the [Internal Submission](#) page.

Internal Grants and Limited Submissions

This content is exclusive to University of Illinois Urbana-Champaign.

Reset Filters

Sponsors

Amount

Applicant Locations

Activity Locations

Citizenships

Show 1-14 out of 14 results

Show 20 Items per Page

Sort by Internal Deadline

Ascending

Title	Sponsor	Amount	Sponsor Deadline	Internal Deadline	Submission
Health Equity Research Network (HERN) on Community-Driven Research Approaches - Partner Hub	American Heart Association	To \$5,000,000	May 14, 2024	Mar 30, 2024	Submit
Outreach and Assistance for Socially Disadvantaged and Veteran Farmers and Ranchers (2501 Program)	Office of Partnerships and Public Engagement U.S. Department of Agriculture	From \$250,000 To \$750,000	Jul 05, 2024	Jun 20, 2024	Submit

- *Tip:* You can search for all internal grants by entering your institution’s name in the “Sponsors” filter.

Go to -- Select a Filter --

Found 35 results in 1.22 seconds. Sort by Relevance Export Save/Load Url

Administrator new!

Sponsored by: University of Illinois Urbana-Champaign With current status: Continuous, Open

With applicant types: Individual, Organization, including unspecifi...

« Previous Layout: Next »

LIMITED

Continuous

Humanities Research Institute (HRI) Supplemental Event Fund

University of Illinois Urbana-Champaign
Humanities Research Institute

HRI's Supplemental Event Fund (SEF) is designed to support events centered in the humanities and arts that have significant funding elsewhere on campus and are seeking supplemental co-sponsorship.

After a successful two-year pilot, we are continuing with SEF in AY 2022-23. Beyond these supplemental funds, HRI will continue to collaborate with campus partners in support of long-term and...

☆

📌

Amount	Deadline	Eligibility	Submission Info
To \$500			

Limited Submissions

Usage Reports

You can generate extensive usage reports of both individuals and institutions to obtain an in-depth understanding of research activities at your institution. You can go to the **Usage Report** page under the **Administrator Console** tab.

1 Set the range of dates for the period of activities you wish to see and click on the **Refresh** button to generate the report.

The screenshot shows the 'Usage Report' interface. At the top, there is a title 'Usage Report' and a link 'Click here to generate the usage report of the selected period.' Below this, there is a date selection area with 'From' and 'To' fields, both containing '02/01/2023' and '04/11/2023' respectively. There are 'Export' and 'Refresh' buttons. The 'Refresh' button is highlighted with an orange box and an arrow pointing to it from the link above. On the left side, there are four main sections: 'User Interaction Statistic', 'Visitors Statistic', 'Search Statistic', and 'Grant Delivery Statistic'. The 'User Interaction Statistic' section is expanded, showing a table of 'Users Statistics' and 'Profile Statistics'.

	During 02/01/2023 - 04/11/2023	All Time
Number of Accounts Created	7	72
Number of Administrator Accounts	6	34
Number of Editor Accounts	0	10
Number of Member Accounts	1	28

Profile Statistics	
Total Number of Profiles	59
Number of Profiles Set as Public	14
Profiles Built Between 02/01/2023 - 04/11/2023	5
Number of Profiles with Recommendation Enabled	28

List of Profiles Built Between 02/01/2023 - 04/11/2023

2 After pressing **Refresh**, your usage report for the selected time frame will be displayed. The report allows you to view the detailed statistics of your institution's usage in four main sections: **User Interaction Statistic**, **Visitors Statistic**, **Search Statistic**, and **Grant Delivery Statistic**.

- The **User Interaction Statistic** part will show you the number of accounts created, profiles built, and those that have recommendations enabled during your selected time frame.
- In the **Visitors Statistic** section, you will see the number of people who access our site and their number of visits.

- You can get search insights on which research areas and sponsors your members are interested in most, and how active they are taking advantage of our utilities dedicated to search activities in the **Search Statistic** part.
- In the **Grant Delivery Statistic** section, you will see how the administrators are assisting members within your institution in the award-seeking process through the statistics of search templates and grant list delivery. You can also view the responses from your members to find the most effective ways to promote your institution's usage of GrantForward.

User Interaction Statistic		Curated Search Templates					
Users Statistics		Total active curated search templates		11			
Profile Statistics				During Period		All Time	
Visitors Statistic		Search Name	Owner	Viewed	Interested (Y/N)	Viewed	Interested (Y/N)
Search Statistic				Angelo State Weekly Grant Search	Kevin Chang	0	0/0
Search History		Auburn Weekly Newsletter Grants	Kevin Chang	0	0/0	0	0/0
Search Insights		Cancer Related Grants	Kevin Chang	0	0/0	0	0/0
Search Utilities		My Alcohol Screen Grants	Kevin Chang	0	0/0	0	0/0
Grant Delivery Statistic		My Alcohol Screen Grants	Kevin Chang	0	0/0	0	0/0
Curated Search Templates		My Cancer Grants	Kevin Chang	0	0/0	7	2/1
Curated Grant Lists		My Cancer Related Sponsors	Kevin Chang	0	0/0	0	0/0
Email Delivery		My Grants in Life Sciences	Kevin Chang	0	0/0	0	0/0
		My Health Sponsors	Kevin Chang	0	0/0	0	0/0
		NIH and Health Related Sponsors	Kevin Chang	0	0/0	1	0/1
		Search Template #1	Howard Guenther	0	0/0	1	0/0
		Curated Grant Lists					
		Total active shared grant lists		16			
		List Name	Owner	During Period		All Time	
				Viewed	Interested (Y/N)	Viewed	Interested (Y/N)
		AI Grants	Kevin Chang	0	0/0	4	0/2
		Angelo State Grant Weekly	Kevin Chang	0	0/0	0	0/0

Integration

You can use different ways to encourage your members to use GrantForward through the integration features supported by us. Just go to the **Integration** page under the **Administrator Console** tab.

Search Widgets

By choosing the **Search Widgets** tab, you can embed the search widget box in your institution's website, which allows your members to search for funding opportunities at GrantForward right from your webpage.

- Customize the look and behavior of the widget by changing the following parameters.

MODE

inline popup

In "popup" mode, search results will be showed in a new popup window or tab. In "inline" mode, search results will be showed in HTML element which has element id="gfembedding-results". The default mode is "inline".

TAB

pre-solicitation grant award profile

Preview

Widget

grant forward
By Casnode

Grants Keywords and phrases

Terms | Privacy

Search Result

Pre-solicitation Grants Awards Profiles

- Copy the Embedding Code which is auto-generated at the top of the Integration page (Remember to use the newly generated code snippet after finishing all the customization!-- and insert it to your webpage. You may ask your IT staff to help.

Integration Management

Search Widgets Logo and Title Single Sign-on Kuali Integration

Embedding Code

To make GrantForward Search and Profile widget available on your website, all you need to do is to embed the following code snippet onto your web page.

```
<script async src="https://www.grantforward.com/integration/embeddingjs?api_key=558a36fa0754a0715248b3b29e5374ca&mode=inline&tab=grant&theme=default"></script><div id="gfembedding"></div><div id="gfembedding-results"></div>
```

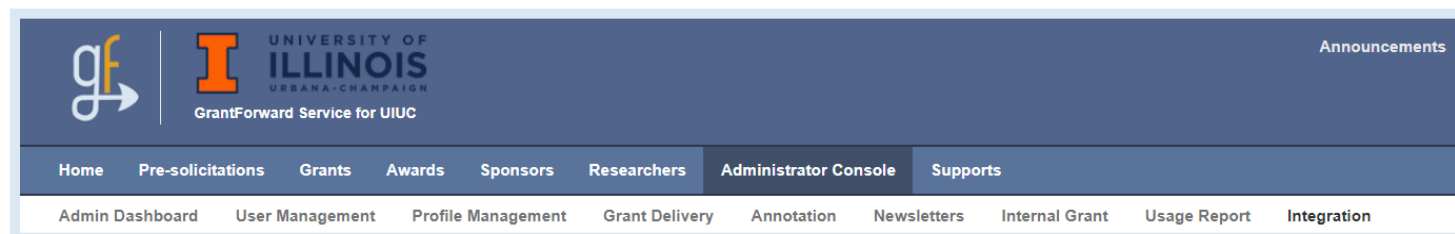
You can also customize the look and behavior of the widget by changing the following parameters. **Remember to use the newly generated code snippet above after finishing all the customization!**

Logo and Title

- 1 When selecting the **Logo and Title** tab, you can choose the image of your institution logo and a short name fitting with displaying conditions. Then, the logo and the name of your institution will be included along with GrantForward Logo.

The screenshot shows the 'Integration Management' interface with the 'Logo and Title' tab selected. The page is divided into two main sections: 'Institution Logo' and 'Institution Title'.
Institution Logo: A preview of the University of Illinois Urbana-Champaign logo is shown. Below it, there is a 'Choose an image' button and a 'Remove Logo' button. A note states: 'Your image will be scaled proportionally so that it would take up a maximum of 200 x 60 pixels on the screen.' A checkbox for 'Transparent Background' is checked.
Institution Title: A text input field contains the text 'UIUC'. A note above the field says: 'Please use a short name that would be included along with GrantForward Logo'.
Preview: A preview of the final header layout is shown, featuring the GrantForward logo, the University of Illinois logo, and the text 'GrantForward Service for UIUC'.
At the bottom of the form are two buttons: 'Save Settings' and 'Reset to Last Saved Settings'.

- 2 After saving the logo and title, you can view them along with the GrantForward logo as below:



Single Sign-On

We currently support the Single Sign-On service via SAML authentication upon request. It allows your members to log in to GrantForward using their institution accounts without having to create separate usernames/passwords on our site. You can request GrantForward to set up this feature for your institution.

Integration Management

Single Sign-on

Administrators can use their institution's Identity Provider Service, which supports SAML 2.0, for authenticating any access from their members to Cazoodle services.

SAML Single-Sign-On Status

Enabled Disabled

When SAML Single-Sign-On is enabled, the institution's SAML Identity Provider Service will be used to authenticate the institution's members who are accessing Cazoodle.com.

When a user accesses Cazoodle via Single-Sign-On, a new account associated with the user's email address will be automatically created on Cazoodle if it does not exist yet. The Cazoodle account will help the user to take advantage of many useful features including saved searches, recommendations and more.

Strict Mode

Enabled Disabled

When Strict Mode is enabled, only Administrators can access Cazoodle directly by using passwords that are registered with Cazoodle. Other users have to access Cazoodle via the institution's SAML Identity Provider Service.

SAML Identity Provider

Please provide the settings of the institution's SAML Identity Provider Service (SAML IdP).

Grant Portals

Administrators can create web portals of funding opportunities by embedding grant lists, search templates, and newsletters from GrantForward to your website. Thus, your faculty members and students can learn about grants right on your institution's website, regardless of whether they have GrantForward accounts.

Embed Curated Search Templates

- 1 Go to the **Grant Delivery** page under the **Administrator Console** tab, and choose **Curated Search Templates**.
- 2 Select the **Embed** section of the search template that needs embedding. You can first customize how the search results look on your website. Then copy the Embedding Code and insert it into your web page. You may ask your IT staff for help.

The search result will be automatically updated when new matching grants are added. All the changes you have made to the Curated Search Template on GrantForward will also be reflected automatically in your website's embedded content.

Biology Funding

Search Condition Recipients Setup **Embed** Ownership Sharing

You can make the Curated Search Template available on your own website. The search result will be automatically updated as we add new grants to our system. All the changes to the Curated Search Template that you have made on GrantForward will also be reflected automatically on your website's embedded content.

You can edit how the result will look to. [click here to customize how the search results will show on your website](#)

Customize Grant Result Interface

To use this Curated Search Template, all you need is to embed the following code snippet into your website.

```
<script async src="https://www.grantforward.com/admin/embeddingjs_template?api_key=56cdf723bfcf8b9baea075ad5d611646&template_id=964"></script><div id="gfembedding-template-964"></div>
```

Copy to Clipboard [click here to copy the embedding code](#)

Preview

Biology Funding

1 2 3 4 5 > >>

Mathematical Biology
National Science Foundation
Division of Mathematical Sciences (U.S.)
[1 more sponsor](#)

Synopsis

The Mathematical **Biology** Program supports research in all areas of mathematical sciences with relevance to the biological sciences.

Deadline: 14 Oct 2025

Embed Curated Grant Lists

- 1 Go to the **Grant Delivery** page under the **Administrator Console** tab, and choose **Curated Grant Lists**.
- 2 Select the **Embed** section of the grant list that needs embedding. You can first customize how the grants in your grant list look. Then copy the Embedding Code and insert it into your web page. You may ask your IT staff for help. All the changes you have made to the Curated Grant List on GrantForward will also be reflected in your website's embedded content automatically.

Curated Search Templates | **Curated Grant Lists** | Portals

Show All Curated Grant Lists + Share a Grant List

Big Data (3) ^

Grant List | Share Setting | **Embed** | Ownership Sharing

You can make the Curated Grant List available on your own website. All the changes you have made to this Curated Grant List on GrantForward will be reflected automatically on your website's embedded content.

You can edit how the result will look to.

[Customize Grant Result Interface](#)

To use this Curated Grant List, all you need is to embed the following code snippet into your website.

```
<script async src="https://www.grantforward.com/admin/embeddingjs_curatedlist?api_key=56cdf723bfcf8b9baea075ad5d611646&curatedlist_id=1174"></script><div id="gfembedding-curated-list-1174"></div>
```

[Copy to Clipboard](#)

Preview

Big Data

Leveraging Big Data for Enhanced Pavement Management
Federal Highway Administration
Fellowships Office - National Academies of Sciences, Engineering, and Medicine
4 more sponsors

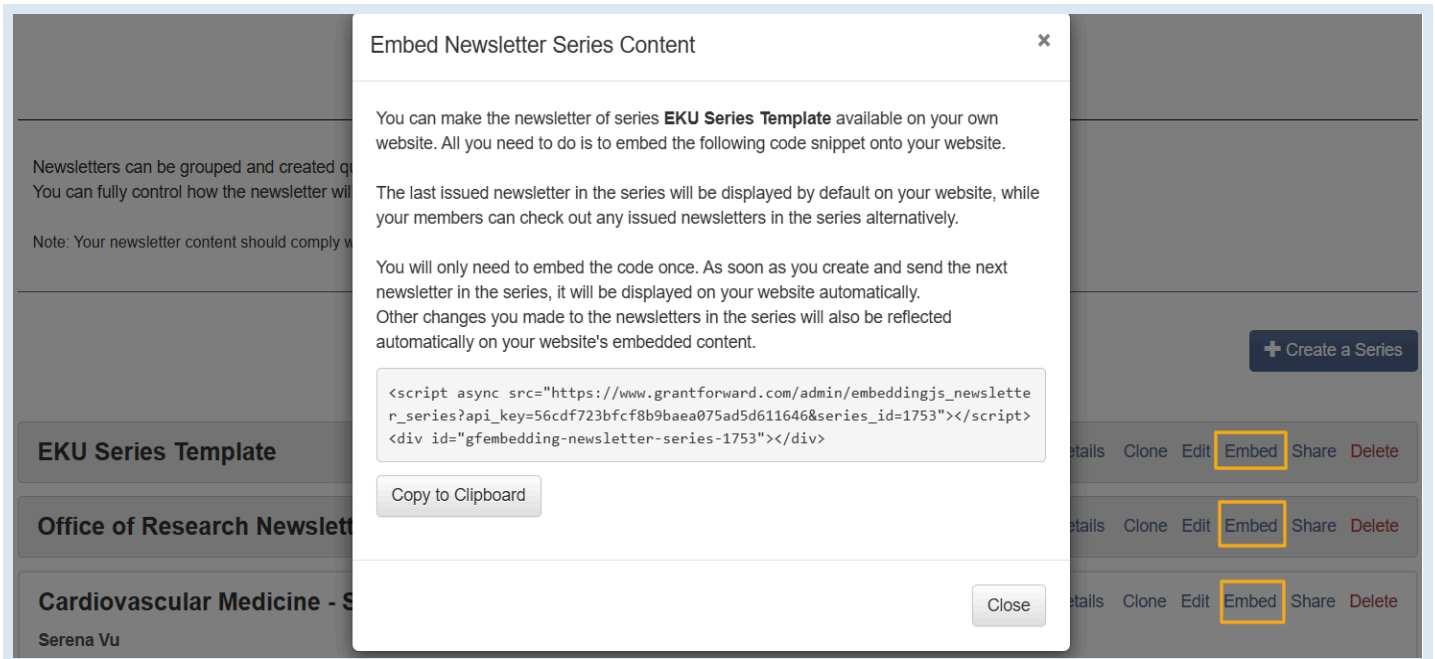
Pavement management relies on different types of data. Inventory data describe the physical elements of a road system. Pavement construction history data describe the pavement structure and layer composition. Condition data describe the condition of elements that can be expected to change over time. Traffic and climate data describe the traffic and environmental loading the pavement is...

Keywords:
deep learning | data analytics | pavement management | big data | data fusion

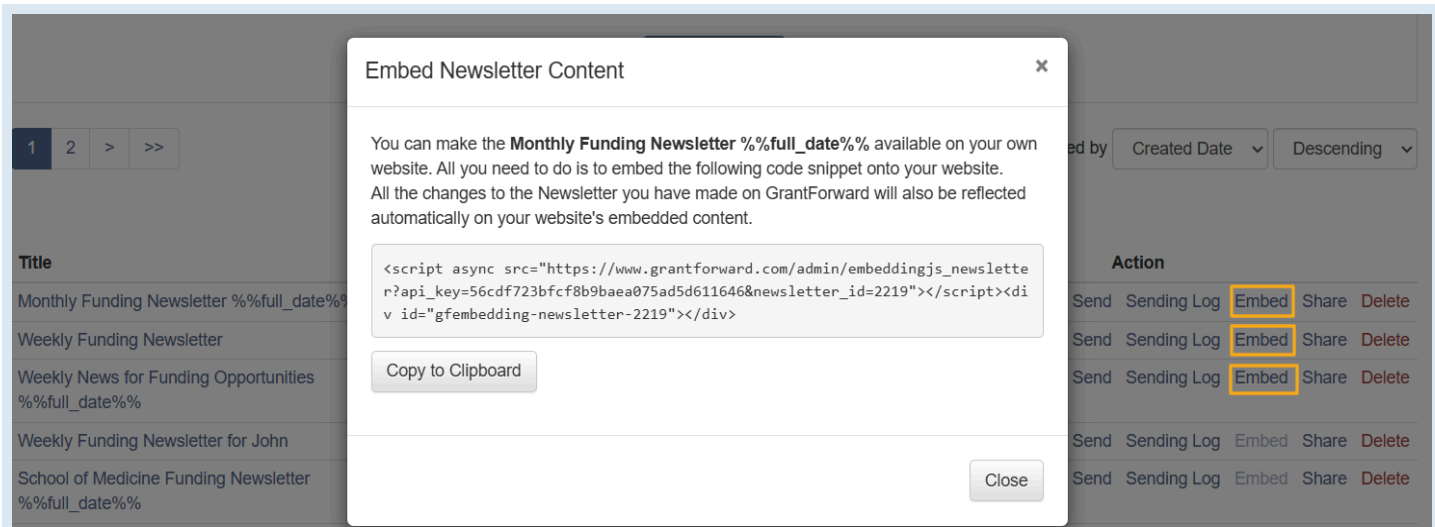
Embed Newsletters

Go to the **Newsletters** page under the **Administrator Console** tab.

- **Embed a series of newsletters:** On the **Series** tab, by embedding the code of a series once, the last issued newsletter in the series will be displayed by default on your website, while your members can check out any issued newsletters in the series alternatively.

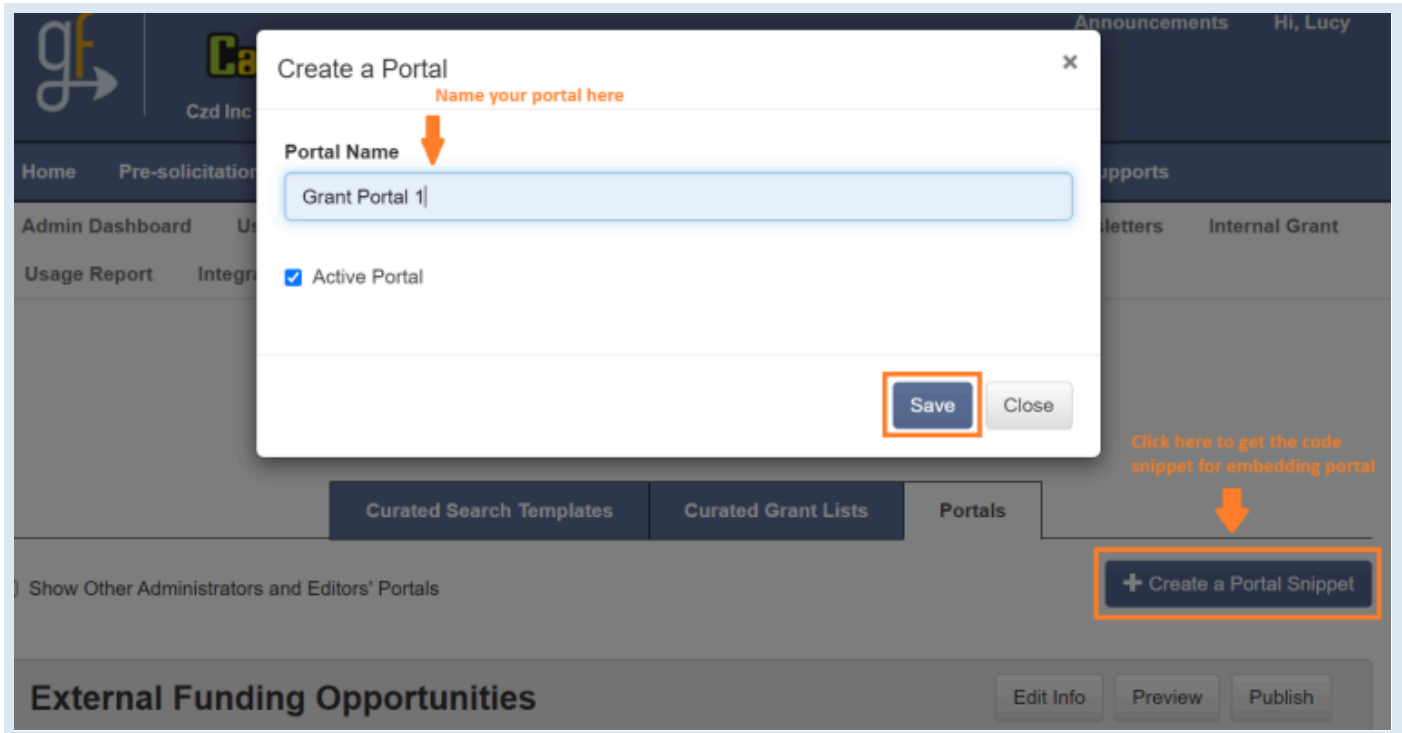


- **Embed an individual newsletter:** On the **Newsletters** tab, click on the **Embed** button in the row of an available newsletter and then copy the embedding code and insert it to your web page. The newsletter will have to be sent at least once before being embeddable into a website or a series of content.

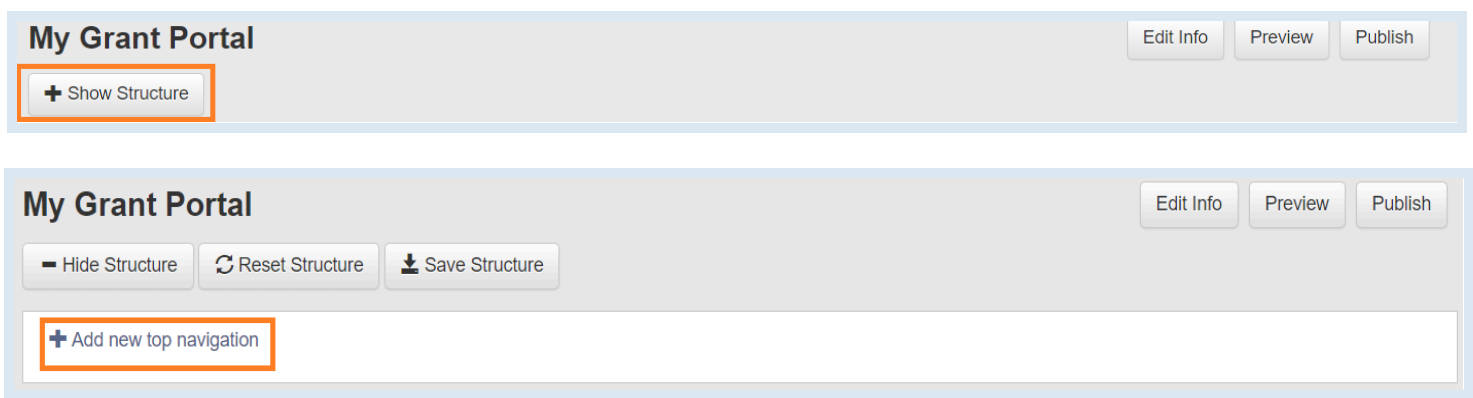


Embed Multiple Search Templates/Grant List

- 1 Go to the **Grant Delivery** page under the **Administrator Console** tab, and choose **Portals**.
- 2 Choose **Create a Portal Snippet** button to name your portal.



- 3 Under the portal name, click on **Show Structure > Add new top navigation**. Fill in the pop-up box to add a grant list/search template to your portal.



Add a Navigation
×

Navigation Label

Navigation Type

Curated List
▼

Deliverable ID Type

Big Data
▼

Set
Back

4 To add more grant lists/search templates to your portals, continue to **Add new top navigation** and fill in the pop-up dialogue. You can also add a sub-tab under the main tab by clicking on the **Add new sub navigation**.

5 Click **Save Structure** to save all the information you have created. Then choose **Publish**, copy the embedding code, and insert it to your web page.

Grant Portal 1

Edit Info
Preview
Publish

– Hide structure
↻ Reset Structure
↓ Save structure

↑
Click here to embed the portal

Big Data

Click here to save the information you added

Federal Grant

State Grant

+ Add new sub navigation

← Click here to add a sub-tab under the main tab

↑

Health Equity

+ Add new sub navigation

STEM Education

+ Add new sub navigation

+ Add new top navigation

← Click here to add a new tab for a new grant list/search template to your grant portal

↑

Example of Grant Portals

- Multiple Curated Grant Lists

I | Funding Opportunities

Funding Opportunities Search Widget Newsletter Fellowships

External Grants

Big Data Health Equity STEM Education

Federal Grant

State Grant

Big Data

Different tabs of grant lists have been added to your webpage

[Notice of Special Interest \(NOSI\): Harnessing Big Data to Halt HIV](#)
National Institute of Mental Health
U.S. Department of Health and Human Services
[3 more sponsors](#)

Notice Number: NOT-AI-21-054 Purpose The purpose of this Notice of Special Interest (NOSI) is to promote and support innovative methods in Big Data Science (BDS) to identify unappreciated biomedical, behavioral, social patterns and other social determinants that shed light on HIV acquisition, transmission, the development of comorbidities, and long-term viral control as in the HIV treatment...

- Newsletters

I | Funding Opportunities

Limited Submissions Cross Cutting Upcoming NIH **Newsletters**

Newsletters

Illinois Life Sciences Grant Newsletter Thursday April 21, 2022

May 1, 2022

Life Sciences Grants

Announcement

Everyweek, the Your Department compiles a newsletter of research funding opportunities and shares it with the faculty and staff.

The newsletter is powered by

Announcement

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN

Account Creation and Recommendation Service

Since your faculty and researchers are very busy, we'd like to help them use GrantForward with minimal hassle in terms of logistics.

Using the faculty members' data list that you provide, we will be able to build GrantForward Accounts and Profiles for researchers so that they can easily access the platform and start receiving automated Grant Recommendations periodically.

Users will also be able to edit their account information and their grant recommendation preferences at any moment by accessing their GrantForward using their credentials and making necessary changes.

