Research

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Research Overview

The AmpliFund Research module provides ways to seek out funding opportunities from Grants.gov, ancillary Federal Agencies, all State Agencies, large cities and counties, and foundations. From the Research module, users can save search criteria, set up alerts, and save and import grants directly from search results.

Research Icons

Icon	Description
🖨	Print
ℹ	Help
★	Favorite
🗃	Imported to Grants

Researcher Role

The Researcher user security role allows organizations to designate users that will research grant opportunities. This role is intended for users that will be researching grant opportunities only; they will not be involved with applying for or managing grants.

Search

The Research module allows you to filter opportunities by eligibility, category, funder type, and deadline, as well as by search terms, partial words, and phrases. The full-text index search supports search terms; partial words (i.e. “Edu”); phrases; as well as "and", "or", and "not" logic (i.e. “Northwest NOT Oregon”). Words separated by a space will return results matching with any of those words. Quotes around search terms will return exact matches.

➲ **To search for opportunities:**

1. Open ***Research → New Search***.
2. In the search field, add **Search terms** (optional). These terms will be searched against opportunity Title, Number, Keywords, Assistance Listings Number (formerly CFDA), Category, Eligibility, Agency, Grantor, and Description fields.
3. Check the **Show archived records checkbox** as desired. This will include any closed or archived opportunities in your search results.
4. By default, your search will include opportunities available to All Organization Types in All Locations. To filter, click **Change**.
   a. In the pop-up window, select eligible **Organization types** and **Locations.** Hold **Control/Command** and **click** to select multiple entries.
   b. Click **Save**.
5. Select **Program Categories** (optional). Hold **Control/Command** and **click** to select multiple categories.
6. Select **Funder Types** (optional). Hold **Control/Command** and **click** to select multiple types.
   a. If your search includes *Federal Government* as a Funder Type, select **Federal Departments** (optional). Hold **Control/Command** and **click** to select multiple departments.
7. Select a Submission Close Date window with the **After** and/or **Before** fields (optional).
8. Click **Search**.

Organizational Administrator users can configure default account Research settings, such as default organization types and locations. All organization types and locations are searched by default.

➲ **To configure account default search settings:**

1. Open ***Administration → License Information.***
2. Open the **Settings tab**.
3. Click the ✎ **(Edit icon)** in the *Icon Bar*.
4. In the *Research Settings* section, select **Default Organization Types** and **Default Locations**.
5. Click **Update.**

Saving Searches

Search criteria can be saved as a private (available only to the user who created it) or public (available to all users in the account). You can also request email notifications for new opportunities that match your search criteria.

Note: Any changes made to public saved searches will be made for all users in the account.

To save a search:

1. Open ***Research → New Search***.
2. Add your **search criteria**.
3. Click **Search**.
4. In the *Saved Search* section, add the **Search Name**.
5. Check the **Send new opportunities and update emails checkbox** to receive email notifications.
6. Check the **Save as private search** to save search to your account (*Research → My Saved Searches*), or leave unchecked to save the search to your organization's account (*Research → All Saved Searches*).
7. Click **Save.**

To view a private saved search:

1. Open ***Research → My Saved Searches → Select a search name***.

To edit a private saved search:

1. Open ***Research → My Saved Searches → Select a search name***.
2. Update the information as necessary.
3. In the *Saved Search* section, click **Update.**

To delete a private saved search:

1. Open ***Research → My Saved Searches → Select a search name***.
2. In the *Saved Search section,* click **Delete.**
3. In the confirmation pop-up window, click **Delete**.

To view a public saved search:

1. Open ***Research → All Saved Searches***.
2. Click a **search name**.

To edit a public saved search:

1. Open ***Research → All Saved Searches***.

2. Click a **search name**.
3. Update the information as necessary.
4. In the *Saved Search* section, click **Update**.

➲ **To delete a public saved search:**

1. Open ***Research → All Saved Searches***.
2. Click a **search name**.
3. In the *Saved Search* section, click **Delete.**
4. In the confirmation pop-up window, click **Delete**.

Email Notifications

Email notifications can be set up from saved search criteria. The email will include all new opportunities and updates that match your search criteria on a daily basis. The notifications will also appear in ***Activity → Message Center***. You will stop receiving email notifications if the saved search is deleted. You can also stop email notifications at any time.

➲ **To set up email notifications:**

1. Open ***Research → My Saved Searches → Select a search name*** or ***Research → All Saved Searches → Select a search name***.
2. In the *Saved Searches* section, check the **Send new opportunities and update emails checkbox**.
3. Click **Update.**

➲ **To stop email notifications:**

1. Open ***Research → My Saved Searches → Select a search name*** or ***Research → All Saved Searches → Select a search name***.
2. In the *Saved Searches* section, uncheck the **Send new opportunities and update emails checkbox**.
3. Click **Update.**

Saving Opportunities

After searching, you can save an opportunity from the *Results* section. You can save an opportunity privately or publicly. Once saved privately or publicly, the opportunity will appear in ***Research → My Saved Opportunities*** or ***Research → All Saved Opportunities***, respectively. Saved opportunities can be sent for internal review or imported as a Pre-Award Grant.

Note: Any changes made to public saved opportunities will be made for all users in the account.

➲ **To save an opportunity:**

1. In the *Results* section, click an **opportunity name**.

2. Click the ★ (**Favorite icon)** in the *Icon Bar.*
3. In the pop-up window, add the **opportunity Name**.
4. Add a **Description** (optional).
5. Check the **Private checkbox** to save privately, or leave unchecked to save publicly.
6. Click **Add**.

To view a private saved opportunity:

1. Open ***Research*** → ***My Saved Opportunities*** → ***Select an opportunity***.

To remove a private saved opportunity:

1. Open ***Research*** → ***My Saved Opportunities*** → ***Select an opportunity.***
2. Click the ★ (**Favorite icon)** in the *Icon Bar*.

To view a public saved opportunity:

1. Open ***Research*** → ***All Saved Opportunities***.
2. Click an **opportunity name**.

To remove a public saved opportunity:

1. Open ***Research*** → ***All Saved Opportunities***.
2. Click an **opportunity name**.
3. Click the ★ **Favorite icon** in the *Icon Bar*.

Send for Review

Once saved, opportunities can be sent to other users with Research access for review. These users can view the opportunity, add any comments, and then reject or convert the opportunity to a pre-award grant.

To send an opportunity for review:

1. Open a **saved opportunity**.
2. Click **Send to Opportunity Review**.
3. In the pop-up window, select **user(s) to notify and review this opportunity**. This list pulls from any users with access to the *Research* module.
4. Add your **Comments** (optional). These will be visible to the user(s) you've selected.
5. Click **Send**. This will send a notification email to the user(s) you've selected.

Reviewing Opportunities

Opportunities for review can be rejected or converted to a pre-award grant. Converted grants will appear in the Grant Management module.

➲ **To view an opportunity for review:**

1. Open ***Research → Opportunities for Review***.
2. Click an **opportunity name**.

➲ **To reject an opportunity for review:**

1. Open ***Research → Opportunities for Review***.
2. Click an **opportunity name**.
3. Click **Reject**.

➲ **To convert to a pre-award grant:**

1. Open ***Research → Opportunities for Review***.
2. Click an **opportunity name**.
3. Click **Convert to a Pre-Award Grant**.
4. In the pop-up window, edit the **Grant Name**.
5. Add a **Grant Manager**. This list pulls from *Contacts →Staff.*
6. Select a **Projected Receipt Date**. This information is necessary for the import process, but can be adjusted later if necessary.
7. Add **Estimated Program Length** in years and additional months. This information is necessary for the import process, but can be adjusted later if necessary.
8. Select to **Create New Grantor record** or to **Link Existing Grantor** if grantor already exists in *Contacts → Organizations*.
9. Select a **grant workflow** to add the pre-award grant to (optional).
10. Click **Save.** Once converted, the grant will have a icon next to its name in the *Opportunities Submitted for Review* list.