AmpliFund

Researcher User Guide

Grant Research for Researcher Users

Contents

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.

Icons

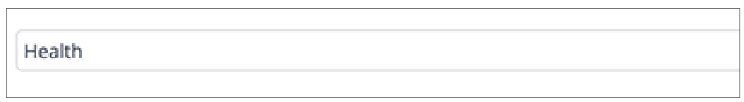
- Print
- Help

Search

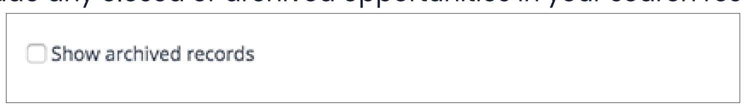
The *Grant Research* module allows you to filter search results for grants by deadline, category, state, eligibility, and funder types, as well as by search terms, partial words, and phrases. The full-text index search supports search terms; partial words (i.e. “Edu”); phrases; as well as "and", "or", 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.

How To Search for Grants

1. Open **Research>New Search**.
2. In the search field, add **Search** terms (optional). These terms will be searched against opportunity Keywords, Assistance Listings Number (formerly CFDA), Agency, 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**.

Note

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

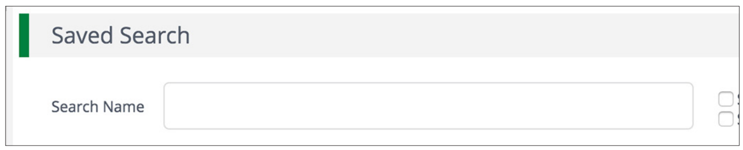
How To Save a Search

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.

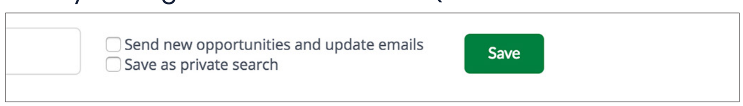
1. Open **Research>New Search**.
2. Add your **search criteria**.
3. Click **Search**.

Saved Search

4. 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**.

How To View a Saved Search

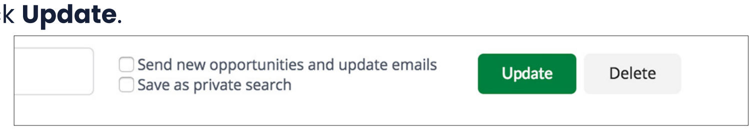
1. Open **Research>My Saved Searches** or **>All Saved Searches**.
2. Click a **search name**.

How To Edit a Saved Search

1. Open **Research>My Saved Searches** or **>All Saved Searches**.
2. Click a **search name**.
3. Update the information as necessary.

Saved Search

4. Click **Update**.



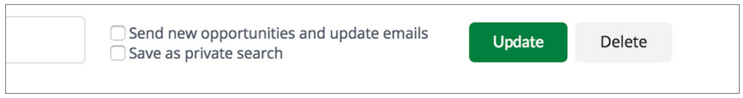
Note
Deleting a public saved search will delete it for all users in the account.

How To Delete a Saved Search

1. Open **Research>My Saved Searches** or **>All Saved Searches**.
2. Click a **search name**.

Saved Search

3. Click **Delete**.



4. In the confirmation pop-up window, click **Delete**.

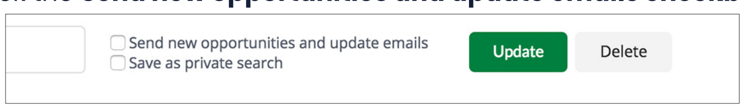
How To Set Up Search Email Notifications

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.

1. Open **Research>My Saved Searches** or **>All Saved Searches**.
2. Click a **search name**.

Saved Search

3. Check the **Send new opportunities and update emails checkbox**.



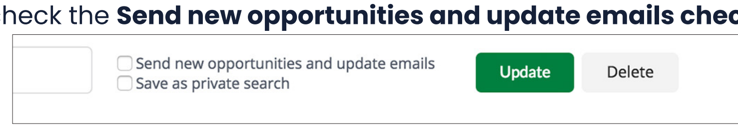
4. Click **Update**.

How To Stop Email Notifications

1. Open **Research>My Saved Searches** or **>All Saved Searches**.
2. Click a **search name**.

Saved Search

3. Uncheck the **Send new opportunities and update emails checkbox**.



4. Click **Update**.

Icons

🖶	Print
i	Help
☆	Favorite
📂	Imported to Grants

Search Results

Search results appear below the *Results* section of the page. From your search results, you can save opportunities and send them for review.

How To Save an Opportunity

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
Researchers cannot import grants into AmpliFund.

Results

1. 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**.

How To View a Saved Opportunity

1. Open **Research>My Saved Opportunities** or **>All Saved Opportunities**.
2. Click an **opportunity name**.

How To Remove a Saved Opportunity

Note
Removing a public saved opportunity will remove it for all users in the account.

1. Open **Research>My Saved Opportunities** or **>All Saved Opportunities**.
2. Click an **opportunity name**.
3. Click the ☆ **(Favorite icon)** in the *Icon Bar*.

How To Send an Opportunity for Review

Instead of importing opportunities directly, users can send grant opportunities to other staff members with access to the *Research* module in their AmpliFund account. These other staff members can view the grant opportunity, any comments, and then import the opportunity as a pre-award grant into AmpliFund.

1. Open **Research>My Saved Opportunities** or **>All Saved Opportunities**.
2. Click an **opportunity name**.
3. Click **Send to Opportunity Review**.

4. 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.

5. Add your **Comments** (optional). These will be visible to the user(s) you've selected.
6. Click **Send**. This will send a notification email to the user(s) you've selected.