GRANTfinder

an **idox** solution

User Guide

Enhancing your
GRANTfinder experience

Table of Contents

1   Getting started

1.1   What is GRANTfinder?

GRANTfinder is the UK's leading professional funding tool. It features information on a comprehensive range of grants, loans and awards from local, regional and national sources, including UK government and European funding, charitable trusts and corporate sponsors.

It comprises in total over 11,000 funding programmes and policy documents covering criteria, eligibility, application procedures and deadlines, enabling users to source and apply for relevant funding opportunities with ease.

The funding service can be interrogated in a variety of ways, including running full project searches and focusing on initiatives administered by a particular funding organisation.

The main features of the GRANTfinder service are the search functions. By entering information (whether detailed or general), GRANTfinder allows you to identify funding programmes which match the criteria of your project.

A filtering facility allows the user to condense the report of matched initiatives to include only those of particular interest: for example, purely grant information or exclusively loan schemes. The results of each search can be saved and the search criteria saved to use again.

1.2   Help at hand

This user guide covers the key features of the GRANTfinder service, helping the user with instructions on how to conduct searches, set up tailored email alerts, organise their funding information and more.

In addition to this user guide, the website contains useful tips, pointers and FAQs on how to use the service to search for funding effectively. Simply visit the *My toolkit* area in the *My Resources* section of the site to access this information.

The Research Help Desk staff pride themselves on being friendly, approachable and offering sound advice, whether it be on using GRANTfinder or on funding in general. If you have any queries regarding any aspect of the system, feel free to contact the Help Desk on +44 (0)3330 111 666 or from the *Contact us* area on the site.
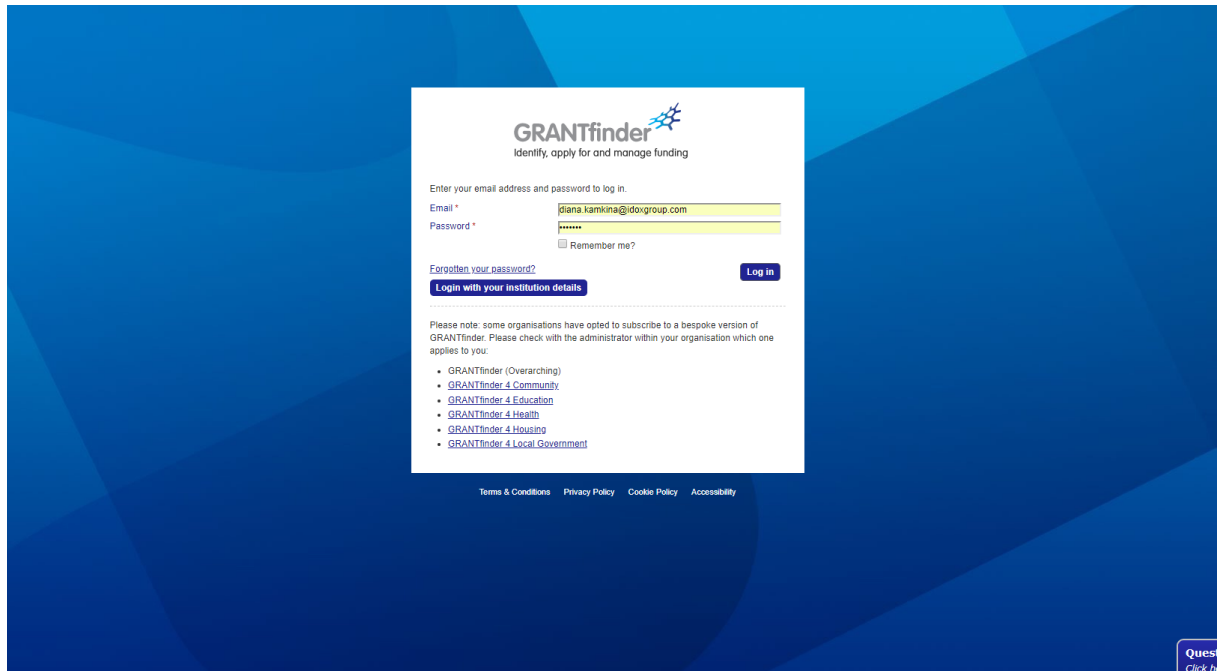
1.3   The GRANTfinder website

The service can be accessed at https://search.grantfinder.co.uk using a personal computer, laptop, iPad or even a mobile phone. The system is browser based, with all popular browsers such as Internet Explorer, Chrome, Firefox and Safari being supported.

Note: If your organisation subscribes to GRANTfinder or a 'bespoke' GRANTfinder (tailored specifically to your organisation's sector), please use the appropriate web address from the following list:

- **GRANTfinder 4 Community**   https://search.grantfinder.co.uk/community
- **GRANTfinder 4 Education**   https://search.grantfinder.co.uk/education
- **GRANTfinder 4 Health**   https://search.grantfinder.co.uk/health
- **GRANTfinder 4 Housing**   https://search.grantfinder.co.uk/housing
- **GRANTfinder 4 Local Government**   https://search.grantfinder.co.uk/localgov

The bespoke GRANTfinder websites offer the same breadth of functionality of the generic GRANTfinder site but with the advantage of news and funding being tailored to the needs and interests of the specific sector.

When first accessing the website you will be greeted with the following screen:

1.4   Logging in

To access all of GRANTfinder's features and benefits, subscribed users are required to log in.

To log in, enter the username (email address) and password created upon subscription to the service:

Tick the **Remember me?** box if you want the website to remember your details (not recommended on a shared computer). Providing you do not log out of the system when you have finished your session, the system will log you on automatically next time you visit the site.

If you have forgotten your password, click **Forgotten your password?** and enter your email address to be sent a password reset link.

Once you have logged in, you will see a variation of the following page:

1.5   The main menu

The following options are provided on the main menu:

Home   Your personalised homepage which enables you to quickly see the latest funding information that is important to you.

About us   Learn about GRANTfinder and the full range of features and benefits the service offers.

Search   Search GRANTfinder for funding opportunities using a variety of search and filtering tools.

News	Make sure you always stay one step ahead with access to the latest funding news and trends (this information is also available direct from the homepage).
My Resources	Here you can amend your account details, search templates, location groups, saved searches and tasks. You can also manage your workgroup memberships.
Library	Browse the reference library which comprises useful articles on topical issues that will support you in applying for funding.
Bulletins	Access the GRANTfinder Bulletin, featuring the latest funding announcements, in the *View bulletins* area; or create a bespoke bulletin relevant to your areas of interest in the *Search bulletins* area. The *View bulletins* area also showcases the latest funding highlights and an archive of previous bulletins.
Intelligence	Read the latest insights into the world of funding.
Training	View information about the suite of training opportunities offered by Idox. You can access full details and upcoming dates for all courses ranging from beginners' courses to full bid writing workshops.
Contact us	Access frequently asked questions and contact the dedicated Research Help Desk.

1.6   Site links

The following links are provided in the footer of each page of the site.

Site Map	An overview of the website and links to key pages.
What our clients say	Testimonials from our clients.
FAQs	Answering all of GRANTfinder's frequently asked questions relating to topics such as setting up users and conducting searches.
Terms & Conditions	The terms and conditions that apply to all users relating to the use and content of the GRANTfinder service.
Privacy & Cookie	Information about Idox's privacy and cookie policy for GRANTfinder users.
Accessibility	Information about the accessibility standards that have been used to develop the website.

1.7   Logout

A logout link is displayed in the top right hand corner of every page allowing the user to log out whenever ending a session (recommended on shared computers).

1.8   Links to additional products and services

As Europe's leading provider of funding and policy information, Idox provides a portfolio of product and service solutions for organisations across all sectors. Links to further information can be found at the bottom of each page.

Information on the full range of Idox products and services can be found at: www.idoxgroup.com

2 The homepage

2.1 Exploring the homepage

The key sections of the GRANTfinder homepage are:

- **Search GRANTfinder** – a quick start button for initiating a new search.

- **Latest information panel** – the latest information about GRANTfinder such as recent enhancements to the system and new Intelligence content.

- **Funds added** – continuously updated list of the latest grants and funding opportunities added to GRANTfinder.

- **Latest calls** – continuously updated list of the newest calls for proposals from the European Commission.

- **Upcoming deadlines** – list of funding opportunities with imminent or approaching deadlines.

- **Funding news** – latest news announcements relating to grants and funding.

- **GRANTfinder blog** – latest commentary and insight affecting the funding and policy landscape.

- **Twitter feed** – the latest Tweets from the GRANTfinder Twitter account.

- **Task list** – A list of general tasks, or tasks related to specific funding schemes, that can be set and compiled by the user through *fund details pages* or via the *My tasks* area in the *My Resources* section of the website. Reminders can also be set by the user to notify them of when a task requires completion.
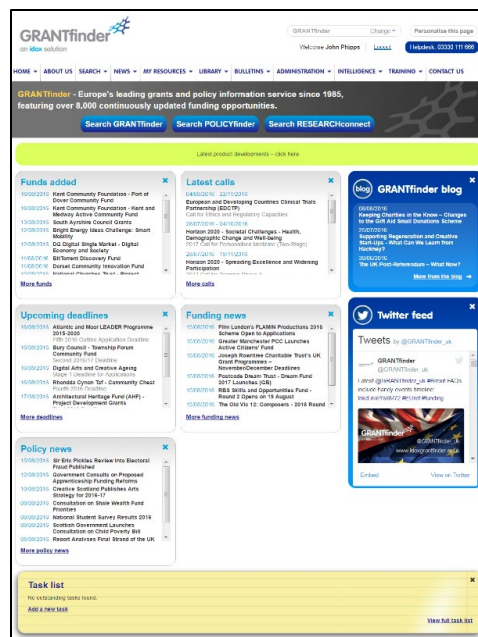
Clicking on a funding scheme title, call, deadline or news item will take you directly to that item. Clicking the hyperlink at the bottom of each box to view more information will present a results listing that can be filtered and/or sorted as desired.

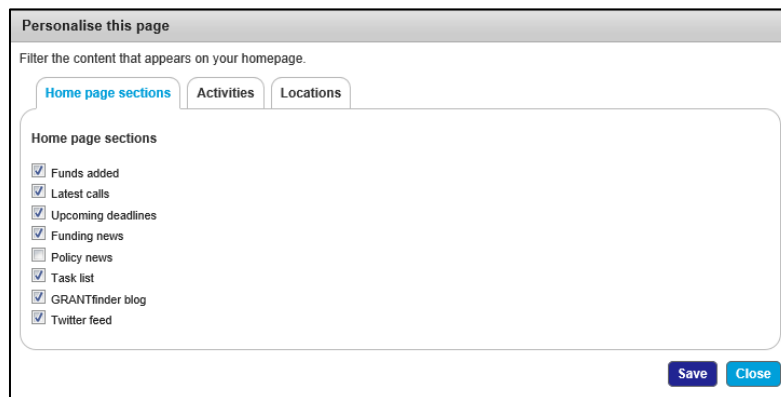Any box can also be removed from the homepage by clicking the small blue cross in its top-right corner.

2.2   Personalising the homepage

When on the homepage, the following button is available in the top-right corner:

Clicking this button allows you to personalise the information shown in the sections displayed on the homepage and tailor it to your individual requirements. You can add and remove boxes as desired to create a dynamic, personalised homepage that features the latest information from the funding world relevant to you.
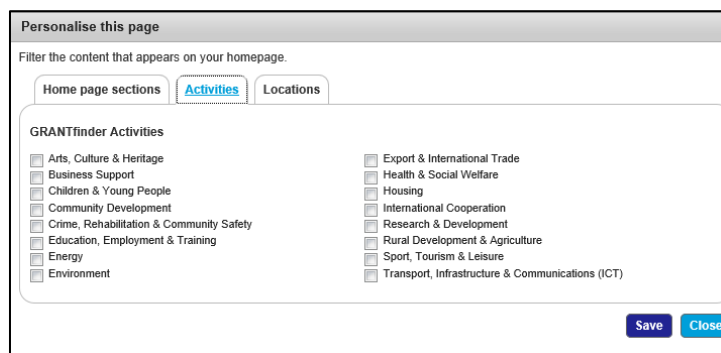
Upon clicking **Personalise this page** you will be presented with the following:
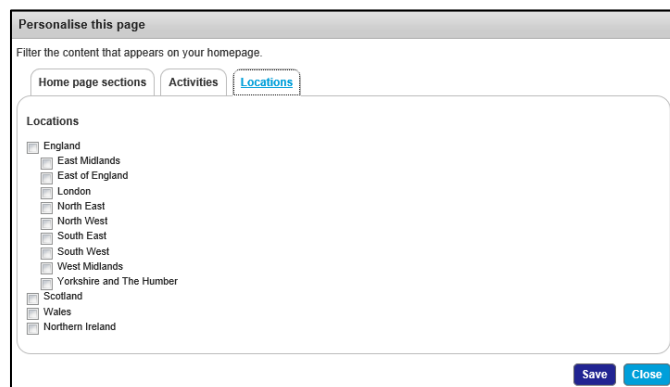

By checking or unchecking the relevant boxes, you can set exactly what you want to be displayed on your homepage.

Use the *Activities* and *Location* tabs to filter the information that is displayed in the boxes on your homepage.
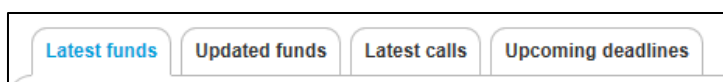
Any changes saved will remain if you log out and then log back on to the site again.

2.3   More information pages

Clicking the **More funds**, **More calls** or **More deadlines** links at the bottom of each box on the homepage will display more information for the relevant section. From here you will be easily able to switch to a different section by clicking the appropriate tab.
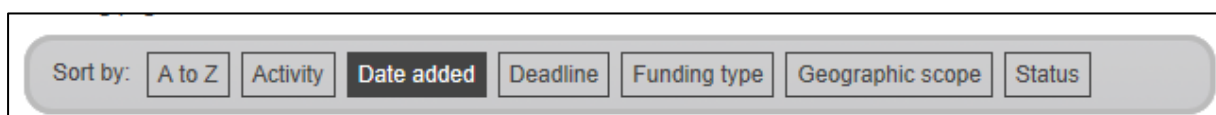

You can also view funds that have been updated from here.

2.4   Funds added and updated funds

Clicking **More funds** in the *Funds added* box takes you to a listing of funding schemes added to GRANTfinder within the last 90 days. You can also view updated funds by clicking on the appropriate tab. The options for added and modified funds are very similar and are described below.

The **Sort by** options can be used to sort the *Funds added or modified* listing alphabetically, by activity, date added (default), deadline, funding type, Geographic scope or status.

The *Produce report* option allows you to download or email colleagues a funding report containing your selected recently added or modified funds.

The filter box on the right of the page can be used to refine the listing. By default, the activity and location filters will reflect your homepage personalisation settings. The default filter settings can be changed, if required.

Other filters allow you to refine the listing by:
- Funding amount: use the slider tool to select minimum and maximum values;
- Funding type: the type of funding in which you are interested e.g. grant, award;
- Funding source: the type of funding source in which you are interested e.g. Corporate, Government;
- Geographic scope: the scope of the fund e.g. local, regional, national or European;
- Date added/date modified: funds added/modified in the last 30, 60 or 90 (default) days. The 'All' option will display all funds added/modified within the last three years. You can set your own number of days by using the 'Custom' option;

- Status: whether the fund is open or closed to applications at the current time. You can also select future or discontinued funds.

2.5   Latest calls

Clicking **More calls** in the *Latest calls* box takes you to a listing of calls for funding applications launched within the last 90 days by the European Commission.

The **Sort by** options can be used to sort the *Calls launched* listing alphabetically or by launch date (default).

The *Produce report* option allows you to download or email to colleagues a funding report containing your selected calls.

The filter box on the right of the page can be used to refine the listing. By default, the activity and location filters will reflect your homepage personalisation settings. The default filter settings can be changed, if required.

Other filters allow you to refine the listing by:
- Funding amount: use the slider tool to select minimum and maximum values;
- Funding source: the type of funding source in which you are interested e.g. Corporate, Government;
- Call date: calls launched in the last 30, 60 or 90 (default) days. The 'All' option will display all calls launched within the last three years. You can set your own number of days by using the 'Custom' option;
- Frequency: the basis on which the funding schemes are open to applications e.g. Annual, Quarterly, One-off.

2.6   Upcoming deadlines

Clicking **More deadlines** in the *Upcoming deadlines* box takes you to a listing of funding schemes due to close to applications within the next 90 days.

The **Sort by** options can be used to sort the *Upcoming deadlines* listing alphabetically, by discipline, deadline (default) or funding body.

The *Produce report* option allows you to download or email to colleagues a funding report containing your selected upcoming deadlines.

The filter box on the right of the page can be used to refine the listing. By default, the activity and location filters will reflect your homepage personalisation settings. The default filter settings can be changed, if required. Other filters allow you to refine the listing by:
- Funding amount: use the slider tool to select minimum and maximum values;
- Funding type: the type of funding in which you are interested e.g. grant, award;
- Funding source: the type of funding source in which you are interested e.g. Corporate, Government;
- Geographic scope: the scope of the fund e.g. local, regional, national or European;
- Deadline date: deadlines within the next 30, 60 or 90 (default) days. The 'All' option will display all deadlines within the next three years. You can set your own number of days by using the 'Custom' option;
- Frequency: the basis on which the funding schemes are open to applications e.g. Annual, Quarterly, One-off.

2.7   Funding news

Clicking **More funding news** in the *Funding news* box takes you to the *funding news archive* area where you can browse and share all published news.

3   Searching

3.1   Using the search tools

Clicking the *Search* option on the main menu will present three search options:

- **New funding search** – for when you want to search from scratch by entering new criteria. You can also use the **Search GRANTfinder** button on the homepage to initiate a new search. You can then run a standalone *Guided search*, *Organisation search* or *Text search* or a compound search which can include all of these.

- **Run a saved search** – this will restore a previously saved search allowing you to identify the most up-to-date search matches.

  Saved searches are split into *My saved searches* (those searches unique to your profile and stored in your personal folders), *Workgroup saved searches* (those searches saved and shared to workgroups of which you are a member) and *Organisational saved searches* (those searches saved and shared across your organisation by Administrators).
  Run a saved search.

- **Search by template** – adopting a search template that has been set up either by you or a colleague. This is useful if you have standard search criteria that require only minor adjustment before conducting a new search.

  Saved templates are split into *My templates* (those templates unique to your profile and stored in your personal folders), *Workgroup templates* (those templates saved and shared to workgroups of which you are a member) and *Organisational templates* (those templates saved and shared across your organisation by Administrators).
  Search by template.

The **Restore last search** button in the top-right corner of the panel allows you to restore the last search you ran:

As the website does not save searches automatically, this provides a quick and easy way of retrieving your last search when you have left the site without having saved it.

To save any of your conducted searches – ensuring that you never lose important search information and criteria – click **Save search** on the results listing page (*Save search*).

3.2   Guided search

The primary feature of GRANTfinder is the facility to search for funding initiatives which are of direct relevance to the project for which funding is sought. A guided search allows a user to enter key criteria relating to the applicant and the project they wish to conduct and then to produce an applicable list of funding results. This is an ideal option when a user has a particular project in mind.

To conduct a funding search, click **New funding search** from the main menu or the blue **Search GRANTfinder** button on the homepage. The following page will then be displayed:

The **Restore last search** button in the top-right corner of the panel allows you to restore the last search you ran:

As the website does not save searches automatically, this provides a quick and easy way of retrieving your last search when you have left the site without having saved it.

The three steps relating to a guided search are:

- Step 1 – *Who you are*
- Step 2 – *Where you are*
- Step 3 – *What you are doing*

The two additional search tabs *Organisation* and *Text search* provide the ability to search by funding organisation; and by word(s) or phrase (*Organisation search*, *Text search*).

Any of the search tabs can be selected for a standalone search or combined with other search criteria for a more complex and precise search. For example, you may want to identify funding based on your location and a basic text search, entering keywords specific to the project. You can enter as much or as little information as desired but the more specific you are about your project, the more relevant but fewer the funding results are likely to be.

As you enter information on each search tab, click **Next step** or click the required tab to enter more information. Once you have finished, click **Search now** to view the results.

To clear criteria entered for a particular search, click on the criteria specified and uncheck the unwanted options. Click **OK** to save your changes.

To clear all criteria entered for a search, click the **New search** button.

3.2.1   Step 1 – Who you are
What is the structure of your organisation and main area of work?

This step involves selecting the most accurate description for the applicant organisation and its partners. If more than one organisation is involved in the funding application process (e.g. a local authority working with a charity) or if an organisation can be described using more than one option, use each relevant tag to reflect the participation of all parties involved. (It may be that one of the partners involved is eligible to apply for funding whilst another is not.)

There are three categories of organisation type:

- Public Sector Organisation
- Voluntary, Community or Social Enterprise
- Private Company

The information you can enter does vary depending on the type of organisation for which you are searching. However, complete as much information as you can to ensure you produce a targeted set of relevant funding opportunities.

Some of the **Select…** links will display a pop up from which you can make your selections. Some of the pop-ups will present a simple list of options while others will display options in a hierarchy. You can browse the latter by clicking on each of the arrows next to the headings to expand the options and then check the relevant box(es). Alternatively, you can use the **Search phrase** text box on each pop-up menu to search for words and phrases from which the website will automatically select the right option for you. This search facility uses a 'type ahead' function – you can type in the first part of a keyword, then select from the options that appear under the text box. The system will automatically locate your area of work from the wider tree.

Other **Select…** links will display a drop-down box from which you can select your preferred option. **Select other organisation information** is a good example of this type of picker.

Remember the following basic rules that apply to all pop-ups:

- Making no selections is the same as checking all boxes – all records will be returned.
- Selecting one option will filter the results to funds that apply to that option.
- Selecting more than one option will filter the results to funds applying to either option. Consequently, selecting more than one option widens the search and will return more results than selecting a single option.

Click **OK** once you have made your selections on each pop-up.

Once you have answered all questions click **Next step** or click another tab to continue with the search. Remember that no questions are mandatory.

3.2.2 Step 2 – Where you are
Where will your project or activity take place (e.g. postcode area, town, county)?

Specifying the location of a project is an important consideration as policy may apply to particular areas such as coalfield regions or neighbourhood renewal areas.

You have the option to select:

- A specific location, which can be a place or postcode. Simply start typing your required location and select from the listed options. Repeat the process if you wish to add additional locations; or

- A pre-defined location group, which can include a number of locations. The location group may have been created previously by you or shared with you. Using a pre-defined location group can save you time particularly if the group includes a number of specific locations.

If you do not want to specify a location for your project, leave the selection blank.

3.2.3   Step 3 – What you are doing
What type of activity, project or ongoing costs are you seeking to fund?

This step requires you to define the objectives of the project – that is, the purpose or activities for which assistance is required.

By clicking on the **Select activities** link, you can choose the most relevant project activities from the pop-up box. If you need clarification as to what the individual activities cover, you can hover over each one to bring up a short description, or you can click **Glossary of activities** to view full activity descriptions.
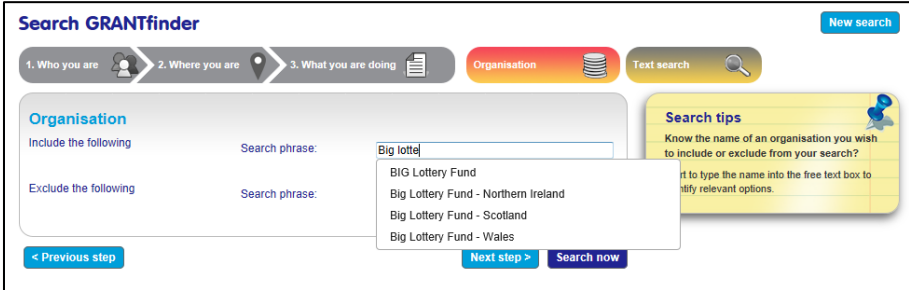
At this stage, you have completed the three main steps of the guided search. Clicking **Search now** will return a list of relevant results (*Search results*).

3.3   Organisation search
The **Organisation** search can be combined with the guided search and text search for a more advanced search but it can also be used individually.

The **Organisation** search feature is useful when you are looking for schemes administered or provided by a particular organisation. Type into the *Include the following* box the first part of the name of an organisation and a list of matching organisations will appear from which you can make your selection. If you know the organisation as an acronym, just type in the acronym and the system will still find it for you. You can repeat the process to select more than one organisation if necessary.

The following image shows an example of a search for the Big Lottery Fund:

You can also choose to exclude organisations from your search results by using the *Exclude the following* box.
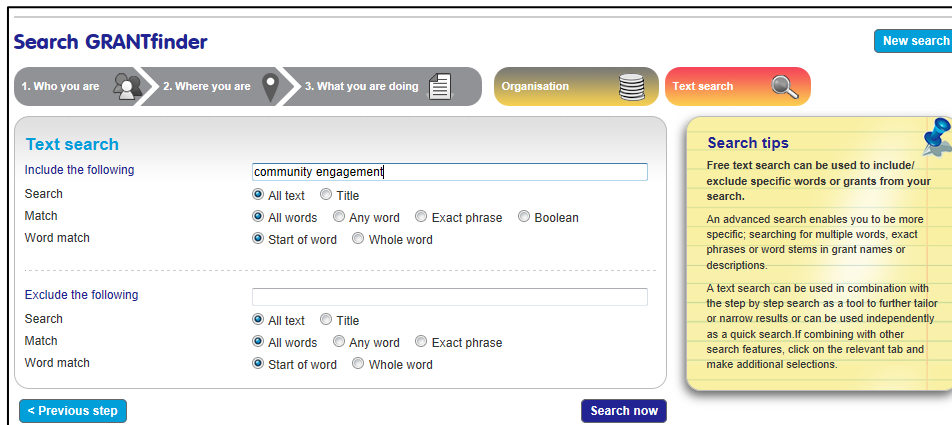
3.4 Text search

The **Text search** option enables you to include/exclude specific words from your search.

You can search for multiple words, exact phrases or word stems in fund names or descriptions. In short, use a text search when you want to:

- search for a specific activity or phrase; or
- quickly locate a funding scheme by its name; or
- conduct background research on a topic.

The example shown above will search every funding report on the website for the presence of the words 'community' and 'engagement'. Because the *All words* option has been selected, both words will need to be present for a fund to be included in the search results. Selecting *Any word* would mean that only one of the words would need to be present. *Exact phrase* would mean that both words would need to be present and positioned together.

You can limit your word search to searching just the title by clicking the *Title* option. A title search is a good option if you know the name of the fund or a word contained within its name.

By default the text search will search for the stem of the word. For example, searching for 'project' will return funds with 'project', 'projects' or 'projecting' within them. If you just want 'project', you should select the *Whole word* option.

Boolean searching is supported on the site and enables you to created more complex text search queries. The main Boolean operators AND, OR and NOT can be used; phrases must be enclosed in inverted commas and brackets should be used to group operations.
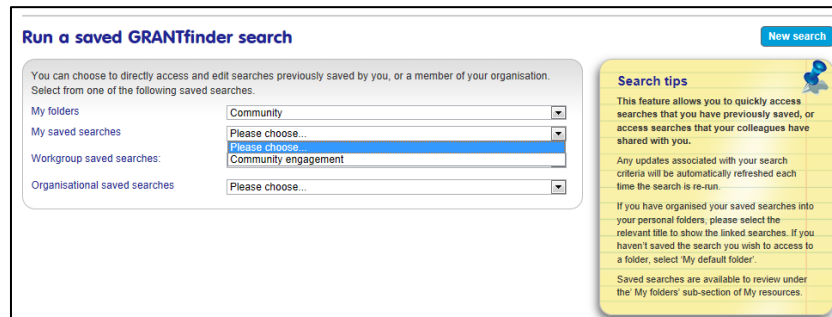
The **Text search** can be used individually but it can also be combined with a guided and/or organisation search to create a more advanced search.

3.5 Run a saved search

This feature allows you to quickly access searches that you have previously saved or access searches that your colleagues have shared with you. You can also run searches that you have created and saved from the *My Resources/My folders* area (*My saved searches*).

Any updates associated with your search criteria will be automatically refreshed each time the search is re-run.
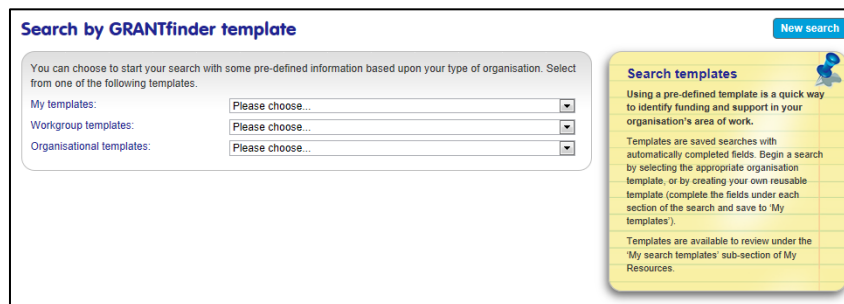
If you have organised your saved searches within your personal folders, select the relevant title of the folder to show the searches saved within it. If you have not saved the search you want to access to a particular folder, select **My default folder**.

Searches shared with a workgroup to which you are a member are available in the *Workgroup saved searches* drop-down box. Similarly, saved searches shared throughout the organisation by Administrators can be accessed from the *Organisational saved searches* drop-down box.

3.6   Search by template

In a similar way to running a saved search, you can run a personal, workgroup or organisational template search from the **Search by template** area.
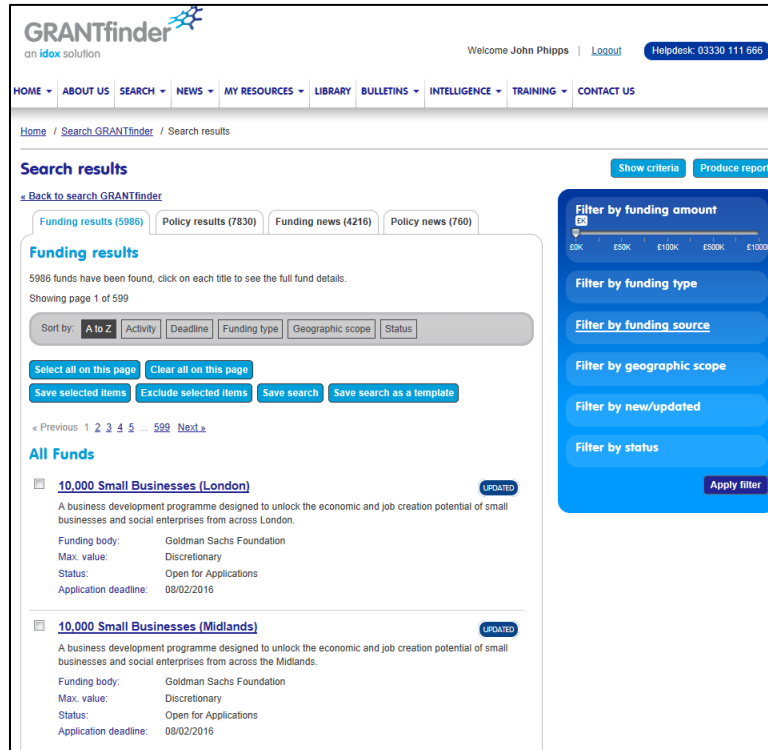
For more information about creating search templates, see *Save search as a template*.

4   Search results

4.1   Results listing

The following is an example of a funding results listing. It shows how many funds and how many pages of funds have been identified. Each page of the listing displaying a maximum of 10 funds:

Every search automatically searches funds and news items simultaneously. Each set of results can be viewed by clicking on the appropriate tab. The number of matching funds and news items is shown in brackets
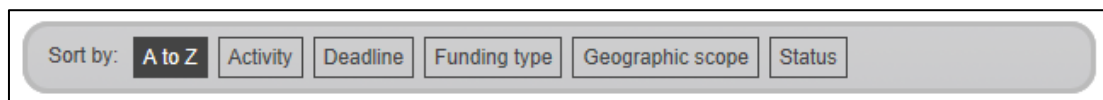
Note: The policy results listings are only available if your organisation has a POLICYfinder subscription.

4.2   Sorting search results

The **Sort by** options can be used to sort funding results alphabetically (default), by activity, deadline, funding type, geographic scope or status.

4.3   Filtering search results

The filter box on the right of the search results page can be used to make matched funding results more specific.

Select as many options as you want to use to focus your results on the most relevant funding schemes. You can add or remove your filter choices at any time by checking/unchecking the relevant boxes and clicking **Apply filter**.

The following filters can be applied to funding search results:

Funding amount – use the slider tool to specify the minimum and maximum amounts that you require for your project. **Note:** Funds that provide support on a discretionary basis will always be returned.

Funding type – select from:
- Grant: Financial support which does not need to be paid back.
- Loan: Temporary provision of funding that must be paid back in instalments at regular intervals and often with interest.
- Loan guarantee: Government-backed finance allocated to qualifying businesses through financial institutions as loans, whereby the guarantor is liable for a portion or all of the debt.
- Rate relief: A percentage of rate costs that an organisation is exempt from paying by meeting certain criteria, dependent on the scheme.
- Rent relief: A reduction of the annual tax bill made on the amount of rent paid annually, thereby enabling businesses to occupy premises at a lower cost.
- Tax relief: A percentage of tax that an organisation is exempt from paying by meeting the criteria of a particular scheme.
- Tax credit: Tax credits can either reduce a company's tax bill or, for some companies, provide a cash sum, with the aim of encouraging greater spending in order to promote.
- Export insurance: Providing exporters with insurance against the risk of not being paid under their export contract.
- Award: A non-financial award including prizes, accolades or certificates together with the kudos associated with winning.
- Venture capital: A type of equity investment offering funds for start-up and development costs, often where a high degree of risk is involved but the prospects for above-average future.
- Equity finance: A type of finance often provided in return for shares in more established companies.
- Information: Schemes that offer information and business support only, not coupled with financial assistance.
- Other: Schemes that are not easily classified elsewhere, such as donations of end-of-line products or materials.

Funding source – select from:
- Charitable: Funding from charitable trusts and foundations that return accounts to the Charity Commission.
- Corporate: Funding and support provided by corporations not linked to government, including 'business to business' assistance.
- Government: Funding from Central Government (includes European Commission), the Devolved Administrations and local authorities.
- Lottery: Funds derived from the National Lottery and distributed by the Big Lottery Fund for Good Causes.

Geographic scope – select from:
- Local: Within a single ward, district, borough or county or combination of counties, but covering an area that is not considered a geographic region, such as the regions of England.

- Regional: Within one of the nine regions of England or in regions of other countries of the UK that are at a level that is considered greater than a local area.
- National: County-wide, either covering the UK as a whole or single country i.e. England, Scotland, Northern Ireland or Wales.
- European: Within the EU member States, or the EU as a whole.

New/updated – select from:
- Latest funds: Funds that have been added to the system within the last 30 days.
- Updated funds: Funds that have had their content checked and refreshed according to the source information within the last 30 days.

Status – select from:
- Future: Early-stage outline information, not yet operational or confirmed.
- Open for Applications: Currently accepting applications; either with a future deadline or open on a continuous basis.
- Closed to Applications: Currently closed; but expected to re-open at a later date.
- Discontinued: Not currently active, retained for information purposes only.

4.4 Using search results
There are a number of ways to use the information listed in your search results:

4.4.1 Show criteria
The **Show criteria** button allows you to review your search criteria and amend your search, if required.

4.4.2 Save search
A powerful feature of the system is the ability to save your search for future use. This can be done by clicking the **Save search** button which will display the *Save search* wizard.

1. On step 1 of the wizard, choose to update an existing saved search, or add as a new saved search to an existing folder, or create a new saved search and a new folder at the same time.
2. On step 2, select the existing search you want to update or give the search a name and select the folder you want to save it to or create a new folder. If you are a member of a workgroup, you have the option to share your search with a workgroup. Administrators have the option to share the search with all users in your organisation.
3. On step 3, you can choose to set up email alerts for the search, which will notify you directly when there have been updates to the results of your search. You have the option to specify the frequency of these alerts and the option to send them to other users or individuals.
4. Click **Save** when you have entered all your requirements.

Note: The system does not save searches automatically and, therefore, any valued search criteria should be saved by users to ensure they are not lost upon logging out of the website.

4.4.3 Save search as a template
By clicking the **Save search as a template** button you can set up a search template. This is particularly useful where there are search criteria that you will use frequently e.g. details about who you are.

1. On step 1 of the wizard, choose to update an existing search template or add as a new search template.
2. If you are a member of a workgroup, you have the option to share the search template with the workgroup. If you are an Administrator, you have the option to share the search template with all users in your organisation.
3. Click **Save** and the template will be saved into the *My search templates* area.

4.4.4 Save selected items

You can save selected funding schemes to a funding portfolio for retrieval at a later date as follows:

1. Check the box alongside the scheme(s) you want to save (the **Select all on this page**, **Select all**, **Clear all on this page** and **Clear all** buttons can be used as appropriate).
2. Click the **Save selected items** button.
3. On step 1 of the wizard, choose to update an existing funding portfolio, or add as a new funding portfolio to an existing folder, or add as a new funding portfolio to a new folder.
4. On step 2, if saving a new portfolio, give the portfolio a name and select the folder you want to save it to or create a new folder. Add a comment to help you distinguish the portfolio, if required.
5. Step 3 enables you to set up alerts on your portfolio so that you or others will be notified if funds within your portfolio are updated in any way.
6. Click **Save** when you have entered all your requirements.

4.4.5 Exclude selected items
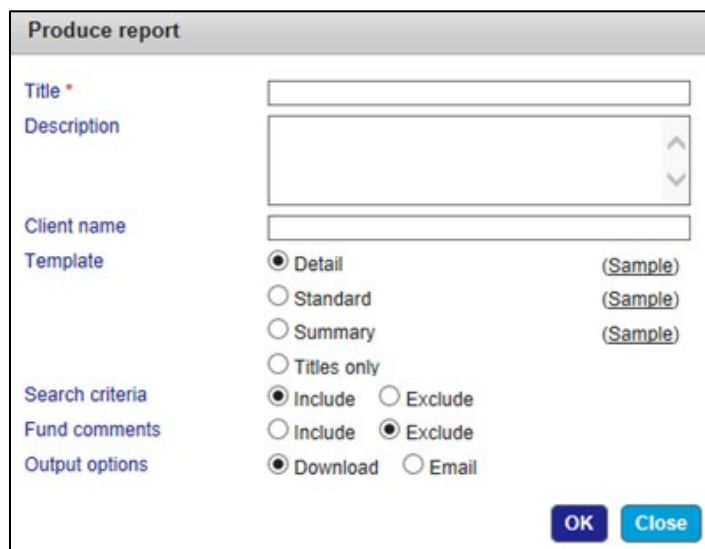
You can exclude funds which are of no interest to you from your result listing by using the **Exclude selected items** button.

1. Tick the scheme(s) you want to exclude (the **Select all on this page**, **Select all**, **Clear all on this page** and **Clear all** buttons can be used as appropriate).
2. Click **Exclude selected items**. The selected schemes will disappear from view.
3. The **Show excluded items** button will become available on the top task bar allowing you to show the excluded items in your results listing (greyed out). Once you have clicked this button, you can also choose to restore any of your excluded schemes by clicking **Excluded: Click to include in results**.

4.4.6 Produce report

You can easily produce a report of your results for your personal use or to circulate to colleagues or partner organisations by using the following procedure.

1. Tick the scheme(s) you want to include in the report (the **Select all on this page**, **Select all**, **Clear all on this page** and **Clear all** buttons can be used as appropriate).
2. Click the **Produce report** button (top right hand corner) to display the report wizard.

Idox, 40 Furnival Street, London EC4A 1JQ
Tel: +44 (0)844 874 0739 | Email: grantfinder.research@idoxgroup.com

3. Give the report a title (mandatory), a description (optional) and enter the client name (if applicable).
4. Select the report template you wish to use for the report. You can choose from:
    ▪ The *Detail* template which includes all information held for each fund.
    ▪ The *Standard* template which, while not including all information about each fund, does include the most critical information including useful links to relevant websites, application forms etc.
    ▪ The *Summary* template which only contains the title, status, funding body, maximum value and application deadline for each fund.
    ▪ The *Titles only* template which provides you with a list of the fund titles generated by your report. The titles are hyperlinked so that you can easily access the full details of the fund.
5. By default, the criteria for your search will be included in your report. If you do not want the search criteria to be included, select *Exclude* next to *Search criteria.*
6. Any comments made in respect of the fund will not be included in your report by default. If you would like to include them, select *Include* next to *Fund comments.*
7. You have the option to download the report in a word processor document format, or to send it by email to yourself and/or to other users and/or individuals. Select the required option next to *Output options.*
    ▪ If you select the *Download* option, click **OK** to start the download.
    ▪ If you select the *Send by email* option, start typing in the **Send to an existing recipient** box the email address of the person with whom you want to share the report and the available options will be displayed. Click on the required option to select it. Repeat the process to add more recipients. If the email address you require is not displayed, use the **Add a recipient not currently using GRANTfinder** link to add the email address to the database. It will then be available for you next time you want to share information with that person. You can also share the report with a workgroup of which you are a member by selecting from the **Send to workgroup** drop-down box. Optionally, overtype the default message to accompany the report.
8. Click **OK**.

4.5   Viewing fund details

Clicking on a fund title will display the fund details.

You have the option to:
▪ print the fund details – by clicking **Print fund**;
▪ share the fund details with another system user, or workgroup of which you are a member, or by email with a recipient not currently using the system by clicking **Share this fund**;
▪ save the fund to a funding portfolio for retrieval at a later date – by clicking **Save this fund**;
▪ view similar funds by clicking on the *People who viewed this fund also viewed* links;
▪ add a new task related to the fund you are currently viewing (*Adding a fund-related task*).

From a fund details page, you can go back to either your search results (click **Back to search results**) or your search criteria (click **Back to search**).

Fund information is presented on three tabs: *Fund details, Calls and Deadlines* and *Comments.* By default, the *Fund details* tab is displayed. Here, you can read full information about the selected fund including its objectives, who can apply, how to apply, contact details and useful documents and links.

Calls and deadlines are further sub-divided into *Current, Future* and *Past* allowing you to quickly see any current funding opportunities and any that are planned to be available in the future. Reviewing past calls and deadlines can also be useful as this might give you an informed view of when the fund may open for applications again.

On the *Comments* tab you will be able to read any comments shared by your colleagues. You can also add and share your own comments (*Adding a comment*).

4.6   Adding a fund-related task

Adding a task from a fund details page will create a task related to the fund being viewed. This is useful for when there is an upcoming deadline, or something of importance relating to the fund, on which you want to take action.

To add a task when viewing a fund, click the **Add a new task** link.
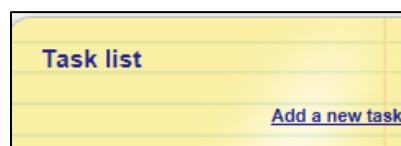
Enter the details of the task in the *Message* box and add a due date. You also have the option to schedule a reminder.

By default, the task will be assigned to yourself. However, you have the option to assign it to another user. If assigning to another user, search for the name of the user to be assigned the task and select

from the available options. Click **Save** when you have entered all your requirements. An email will be sent to the task recipient containing details of the task they have been assigned.

4.7   Adding a comment

You can quickly add comments to a funding opportunity for your own use or for other users to see by clicking the **Add comment** link in the comments area.
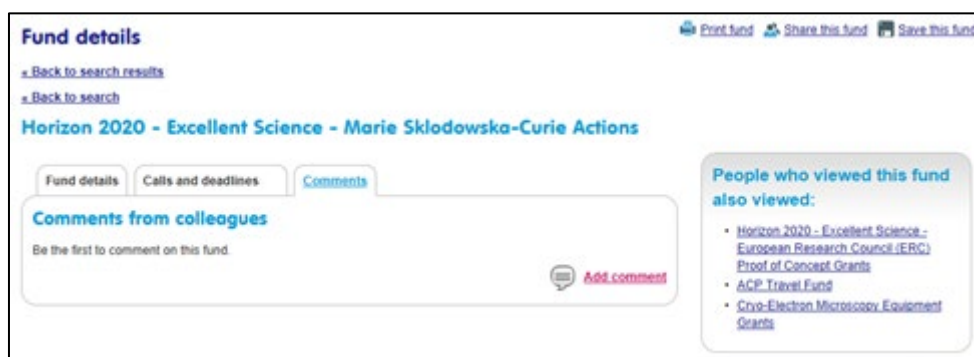
Add a comment in the comment area and save the comment if you only want it to be visible to yourself. If you are a member of a workgroup, you have the option to share the comment with the workgroup. Selecting this option will notify members of the workgroup by email that the comment has been added. You can also share a comment with all users in your organisation but this will not generate an email.

Note: When a comment has been made on a fund, a speech bubble icon appears on the *Comments* tab and the search results page as shown below. This enables you to quickly see that the fund has comments which are available for you to view.

Comments tab   Search results page
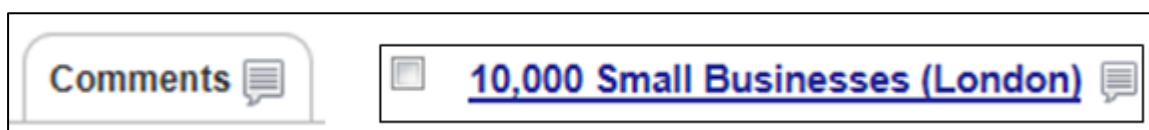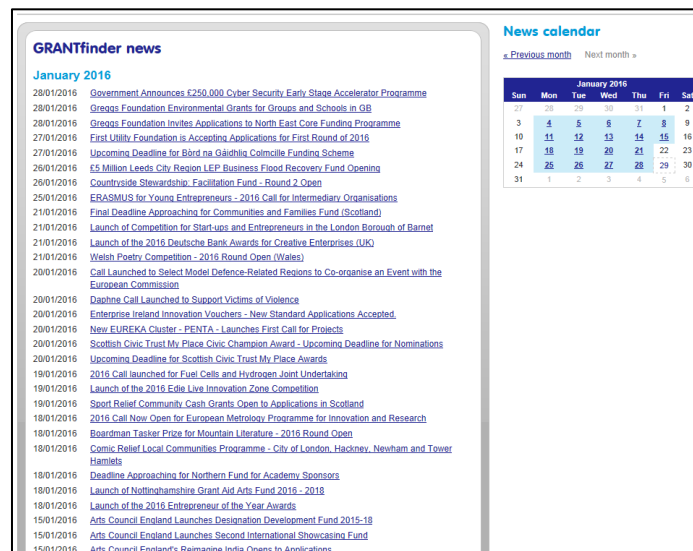
5   News

5.1   News alerts by email

In order to ensure you are kept fully up to date and never miss an important funding opportunity, you can configure your system so that you receive news alerts directly to your inbox. This can be done in the *My updates* area.

5.2   News archive

Whether you decide to receive email alerts or not, you can always view published news articles by clicking *News* on the main menu. News articles are then displayed by month.

The **Previous month** and **Next month** links can be used to select the news articles for other months. Clicking on a date highlighted in blue in the calendar will display the news articles for that day.

Clicking on the heading of any news article will display the full article.

5.3   Sharing a news article

Users have the ability to quickly share news articles, complete with information regarding any related funds, with other users, other individuals who are not users or a workgroup of which they are a member.

When viewing a news article, click the **Share this news article** link. You can then configure with whom you would like to share the news article and what information you want to send them.

Start typing in the **Send to an existing recipient** box the email address of the person with whom you want to share the news article and the available options will be displayed. Click on the required option to select it. Repeat the process to add more recipients. If the email address you require is not displayed, use the **Add a recipient not currently using GRANTfinder** link to add the email address to the database. It will then be available for you next time you want to share information with that person. You can also share the news article with a workgroup of which you are a member by selecting from the **Send to workgroup** drop-down box.

The report template you wish to use for any related funds can be selected. The *Detail* template will include all information held for that fund whereas the *Summary* template will only contain the title, status, funding body, maximum value and application deadline for the related fund. The *Standard* template, while not including all information about the related fund, does include the most critical information.

You can use the *Message* box to include a customised message that will be included in the email.

When you have entered the required information, click **OK** to send the email to the selected recipients.
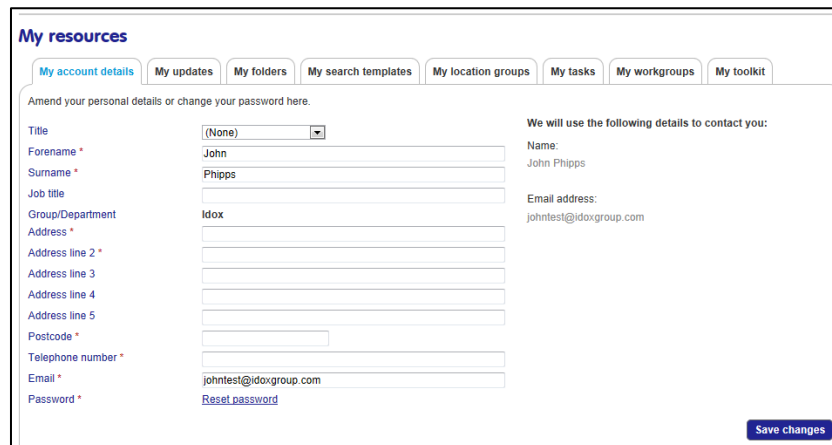
6   My Resources

The *My Resources* area is an important area as it contains information specific to you. For instance, in this area you can change your password, access your saved searches, create tasks and manage your workgroup memberships.

The specific areas within *My Resources* are as follows:

6.1   My account details

In the *My account details* area you can edit and update your account information.

You can modify any of the stored information at any time by entering the new information into the relevant box.

To change your password, click the **Select password** link and then enter and confirm your new password. Your password will be encrypted once it is saved and so it is totally secure and cannot be viewed by any other person, including administrators. You should not share your password with other people.

Once you are happy with the entered information, click **Save changes**. Your account details will be updated immediately.

6.2   My updates

In the *My updates* area you can choose what updates you want to receive directly to your inbox by checking the appropriate tick boxes. This includes the GRANTfinder Bulletin, news alerts and Training and bid writing news.

You can filter the news alerts you receive by checking the appropriate *Activity* and/or *Location*. In the example shown, only news alerts relevant to *Business Support* would be received. Multiple selections can be made if you are interested in more than one *Activity* and/or *Location*. **Note:** Even if an *Activity* and/or *Location* have been selected, you must have also checked the **Receive GRANTfinder news alerts by email** box.

You can receive alerts about training and bid writing by checking the **Receive training and bid writing news** option.

Receiving news alerts and the bulletin directly to your inbox is a great way to keep up to date with the latest funding information. However, you can also view published news alerts and bulletins on the site at any time by clicking *News* and *Bulletins* respectively on the main menu.

Once you have selected your preferences, click **Save changes**. You can change your preferences at any time.

6.3   My folders

In the *My folders* area you can create new folders and edit existing folders. Folders will help you to organise your saved funding searches, funding portfolios and personal bulletins.

You will initially be provided with a folder called *My default folder* in which you can store your searches, funding portfolios and personal bulletins. You can add new folders by clicking the **Add a new folder** link. Folders can be named according to your preference and you can create as many of them as you require.
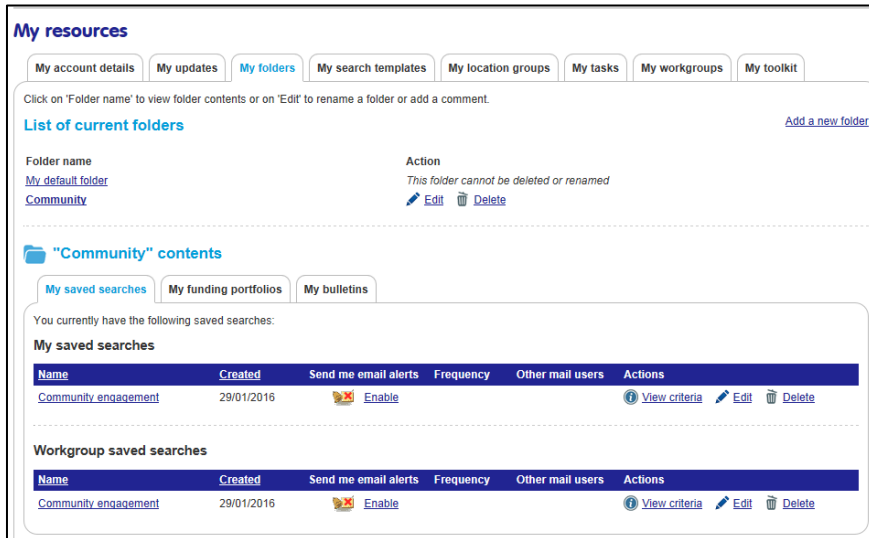
The name of a folder can be modified or a comment added or modified by clicking the **Edit** link. A folder can be deleted by clicking the **Delete** link and then confirming that you want the deletion to be actioned. Once you have confirmed, the folder will be irretrievably deleted.

If you want to view the contents of a particular folder, click on the appropriate folder name. The contents of each folder are divided into three sections: *My saved/shared searches* (*Save search*), *My funding portfolios* (*Save selected items*) and *My bulletins* (*Personal bulletin*). Click on the relevant tab to view the contents.

6.3.1   My saved searches

In the *My saved/shared searches* area there will be a section for your saved searches and, if you have shared a search with a workgroup, a section for workgroup saved searches. This quickly enables you to see which searches you have shared with others. Any shared search can be run by others from the *Run a saved search* area (*Run a saved search*).

Note: Administrators may have a section for organisation shared searches if they have shared searches with the organisation as a whole.

You can use the action links to **View criteria** of the search, **Edit** the search including its name, comments, alerts and sharing and **Delete** the search. You can also quickly enable/disable an email alert to yourself by clicking **Enable**/**Disable** in the *Send me email alerts* column.

To run a search, simply click the search name.

6.3.2   My funding portfolios

Any funding portfolios saved into the folder are displayed when you click on the *My funding portfolio* tab.

You can add additional funding portfolios by clicking on the **Add new funding portfolio** link.

You can use the action links to **Edit** the funding portfolio including its name, comments and alerts, **Print** the funding portfolio and **Delete** the funding portfolio. You can also quickly enable/disable an email alert to yourself by clicking **Enable**/**Disable** in the *Send me email alerts* column.

To view the contents of a funding portfolio, simply click the funding portfolio name.

6.3.3   My bulletins

Any personal bulletins saved into the folder are displayed when you click on the *My bulletins* tab.

You can add additional personal bulletins by clicking on the **Add new bulletin** link.

You can use the action links to **Edit** the bulletin including its name and comments, **Print** the bulletin and **Delete** the bulletin.

To view the contents of a bulletin, simply click the bulletin name.

6.4   My search templates

In the *My search templates* area there will be a section for your saved search templates and, if you have shared a search template with a workgroup, a section for workgroup saved search templates. This enables you to quickly see which search templates you have shared with others. Any shared search template can be run by others from the *Search by template* area (*Search by template*).

Note: Administrators may have a section for organisation shared search templates if they have shared search templates with the organisation as a whole.

You can use the action links to **View criteria** of the search template, **Edit** the search template including its name and sharing and **Delete** the search template.

To run a search using a search template, click the search template name and you will be taken to the *Search* page. The template's saved criteria will be entered under each tab of the search tool ready to view or edit. Click **Search now** to run the search based on the entered criteria.

6.5   My tasks

In the *My tasks* area you can view active tasks under the *Active tasks* tab or completed tasks under the *Completed tasks* tab.

The *Task name* is displayed along with the *Due date*, any *Associated item* (usually a fund) and whether the task has been assigned to you or by you to another user. If there is no assignment, the task is a personal one for you.

You can add a new task by clicking on the **Add a new task** link. You will then be able to enter the details of the task. Add a due date and reminder, if required. By default, the task will be assigned to you as a personal task. You can assign the task to another user by entering part of the email address in the *Assign to user* box and selecting the required email address from the list of displayed options.

You can use the action links to **Edit** the task, **Delete** the task or **Mark complete**. If you mark a task as complete, it will be moved to the *Completed tasks* area and an email will be sent to the person who assigned you the task initially.

6.6   My workgroups

Workgroups enable funding information such as searches, search templates, email alerts, news articles, funds, bulletins and reports to be shared quickly between groups of people.

You can manage your workgroup memberships in the *My workgroups* area.

When you are invited to join a workgroup, you will be sent an email advising you of the invitation. You can then access the *My workgroups* area to accept or decline the invitation (see 'Bid team' in the example above). To accept, click the **Accept invitation** link and to decline, click the **Decline invitation** link.

When you have accepted the invitation, the status will change to *Membership active* and the action to **Leave workgroup** (see 'Bulletin' in the example above). You can click on this action at any time to leave the workgroup.

To see who else is in the workgroup, click on the name of the workgroup.

6.7   My toolkit

In the *My toolkit* area you can access a number of downloadable documents to help you use the system to its full potential.

New and updated documents are regularly added to the *My toolkit* area – be sure to check it for the latest information.

7 Bulletins

7.1 The GRANTfinder Bulletin

The latest GRANTfinder Bulletin can be accessed at any time via the *Bulletins* tab found on the main menu. Selecting the *View Bulletins* option will direct you to the bulletins page where you can view the latest bulletin alongside the suggested 'funding highlights' for the month and an archive of previous bulletins.
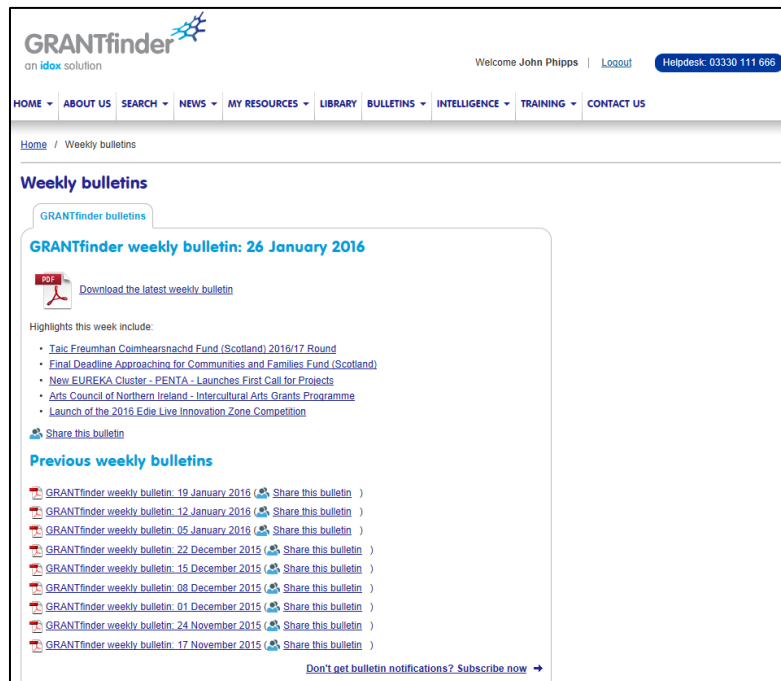
You can easily share a bulletin with others by clicking the **Share this bulletin** link alongside the bulletin you want to share. You have the option to share the bulletin with other users or individuals who may not be users. You can also share with a workgroup of which you are a member. Optionally, you can add a custom message for the recipient before sending the bulletin.

Remember you can configure to receive the monthly bulletin automatically by email in the *My updates* area.

7.2 Personal bulletin

It is also possible for you to create your own personal bulletins either for your own use or for disseminating to others. You can access this functionality by clicking the *Search bulletins* option on the *Bulletins* menu.

You are then presented with a search page which enables you to select from a database of the news articles used in the GRANTfinder monthly bulletin. You can select articles by activity, location, date or by specific word(s) or phrases.

Once you are happy with the selected criteria, click **Search now**. A results page will then be displayed:

Your results, by default, will be displayed in date order with the most recent at the top. You can re-sort your results alphabetically or by discipline by clicking the appropriate button on the grey sort bar. To read full details of the article, click the title of the article.

You can select the articles for inclusion in your bulletin either individually by checking the box alongside each required article or by clicking the **Select all on this page** or **Select all** buttons. Select all will select all articles retuned in you search whereas **Select all on this page** will only select the first page of results.

Once you have completed your selection, click the **Save selected items** button to save your personal bulletin into a folder off your choice. Use the *Update existing bulletin* option to add articles to an existing personal bulletin.

Once saved, you can view your bulletin in the *My folders* area (*My bulletins*). To create and/or disseminate the bulletin, click on the bulletin name. You can then make a final selection of what you would like to appear in the bulletin and click the **Produce bulletin** button. You have the option to either download or email the bulletins to others or to a workgroup. Remember that if you download the document, you will have the ability to edit the content before disseminating it.

8 Contact us

If you require assistance with using the site, you will find some helpful resources in the *Contact us* area.

8.1 Frequently asked questions (FAQs)

You can access FAQs by clicking on the link in the *Need help?* box. You can then access the appropriate section and question relevant to your enquiry. Click the question and relevant information will be displayed. An example is shown below:

8.2 Subscription enquiries

If you have a question about your subscription, click the **Click here for subscription enquiries** link in the *Contact us* area and you will be able to send an email to us outlining your enquiry.

8.3 Help desk

You can contact our help desk during normal business hours by either telephone (the number is shown in the top right hand corner of every page of the site) or by clicking the **Click here to contact our client help desk** link in the *Contact us* area.

9 Further information

Further information on GRANTfinder and Idox's full range of products and services is available from:

Customer Services
Idox
40 Furnival Street
London
EC4A 1JQ

Tel: +44 (0)844 874 0739
Email: grants.customer.services@idoxgroup.com