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# User Manual

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# Life Science Professionals and NaviGRANT

**N**aviGRANT provides a variety of life science professionals with the ability to scan, pinpoint, and analyze previously underutilized grant funding data and convert it into true market intelligence. Developed by a former life sciences sales executive, NaviGRANT transcends traditional list generation—or “data dumps”—by using smart algorithms that locate, organize, and arrange search results according to your criteria. Less time in front of the computer means increased productivity - and that’s NaviGRANT’s goal!

Marketing
<p>Grant Search enables you to ...</p> <ul style="list-style-type: none"> <li>● Focus your marketing and sales efforts on those fields of research that are attracting the most interest – and funding.</li> <li>● Assess current funding levels of your market area to better manage your product development and product portfolio.</li> </ul> <p>Market Basket Summary enables you to ...</p> <ul style="list-style-type: none"> <li>● Stay ahead of the competition by learning as much as possible about the level of funding specific areas of research are attracting.</li> </ul> <p>New Award Trends Summary enables you to ...</p> <ul style="list-style-type: none"> <li>● Mine data and quantify both new and unanticipated trends.</li> </ul>
Sales Managers
<p>Grant Search enables you to ...</p> <ul style="list-style-type: none"> <li>● Target and prioritize your sales efforts by pinpointing specific laboratories in your market and specific geographic areas receiving the most funding.</li> <li>● Track funding in your targeted institutions and product focus areas. Use Grant Search to target your reps by both laboratory and approach.</li> <li>● Create more targeted and effective campaigns by matching research area with individual researchers.</li> </ul>

## Medical Liaisons

Grant Search enables you to ...

- Scan and track individual research areas and identify which researchers are doing work in your areas of interest.

Market Basket Summary enables you to ...

- Locate grants that relate to your areas of interest, and pinpoint specific laboratories and institutions engaged in similar research.

New Award Trends Summary enables you to ...

- Quickly and easily track trends for your institution and others while learning more about which grants are being funded along with the amounts for each.

## Sales Representatives

Grant Search enables you to ...

- Identify the principal investigators conducting research in your market and obtain their contact information.
- Identify the geographic areas that are receiving the most funding in order to optimize your sales efforts.
- Increase your productivity through more effective call planning and anticipation of researcher interest in key product areas.

Organization Snapshot enables you to...

- Stay current on the types of research in which your customer base is actively engaged.
- Track your current and potential customers' level of funding and historical grant award trends.

## Introduction

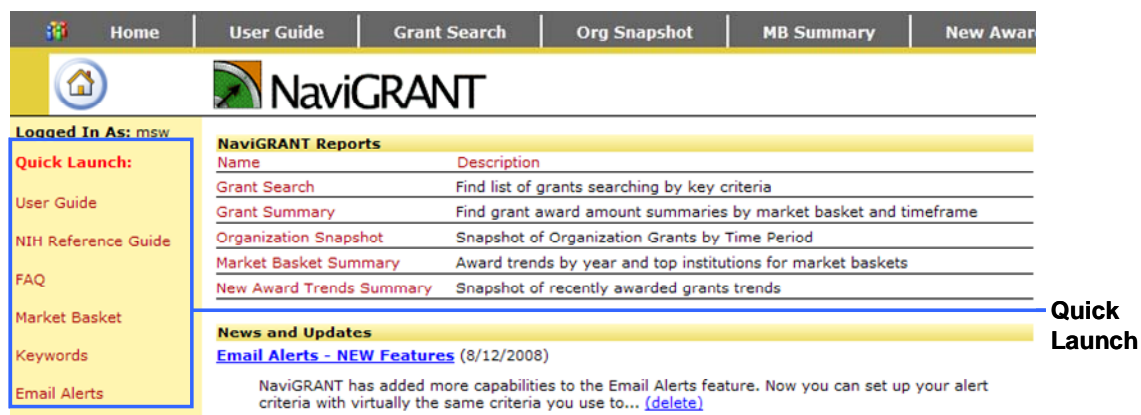
NaviGRANT is an on-line, subscriber resource providing life science professionals with the tools to scan, pinpoint, and analyze biomedical grant funding information more effectively.

NaviGRANT’s goal is to be the largest and best source for grant award information by offering both government and non-government sources of information. NaviGRANT was developed by a former life science sales executive solely to create targeted intelligence that can be acted on immediately.

Publicly available sources of information are constantly scanned to ensure that users can easily and efficiently access the latest information. NaviGRANT’s structure and interface is powerful yet intuitive. Proprietary algorithms produce results that are both comprehensive and focused, reducing the time and effort needed to “manually filter” search results.

NaviGRANT search results are available in tailored report formats to match your customized search criteria. Each report can be exported into a variety of file types to take advantage of the sort, filtering, and formatting options available. Microsoft Excel is the most widely-used option.

The NaviGRANT home page (**Figure 1**) provides links to the types of reports along with a brief description of each.



**Figure 1.** NaviGRANT home page

The left margin displays the Quick Launch menu with links that provide instant access to useful information. For example, a reference guide to the National Institute of Health (NIH) provides a clear breakdown and explanation of NIH grants and contract award codes. The Quick Launch tool is an easy way for NaviGRANT users to get introduced to the system.

# NaviGRANT Report Options

## Report Types

NaviGRANT provides several report options for searching and analysis (Figure 2).

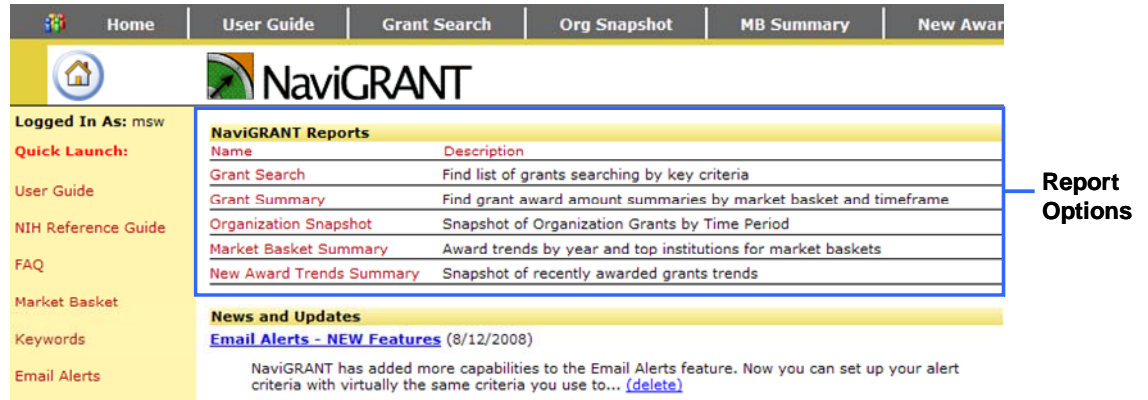


Figure 2. NaviGRANT report options

## Grant Search

**Grant Search** produces a list of grants by state, institution, and principal investigator (PI) that contain the defined criteria you specify. Grant Search reports provide invaluable information for field sales and management by identifying PIs and institutions that are important to you. Contact information for the PI and the abstract for each grant are just two examples of how Grant Search turns information overload into true market intelligence.

## Grant Summary

**Grant Summary** returns a list of the total grant awards by organization and market basket for the previous three years. Grant Search reports provide information that helps you rank the importance of specific organizations by making it easy to discover the total amount awarded over the last three years. In addition, the information is sortable by state, city and zip so you can organize the information in a way most beneficial to you.

## Organization Snapshot

**Organization Snapshot** provides detailed reports that graphically display grant award activity within specific research areas or “Market Baskets.” Funding levels by organization can be summarized based on year and quarter. It also lists the top 10 grant awards and grant awards ending during that period of time.

## Market Basket Summary

One of the most powerful aspects of NaviGRANT, Market Basket Summary reports enable you to quickly see award trends within a specific research area or technique.

## New Award Trends Summary

The **New Award Trend Summary Report** lets you analyze grant trends by market basket and institution. The analytics engine within NaviGRANT allows you to mine the data in order to identify new and unexpected trends along with the funding levels each is attracting. Understanding the macro funding trends for specific product areas allows you to support and direct your sales force by tailoring training information to specific grant areas.

## Grant Search

Grant Search is the specific tool that provides access to lists of grants by state, institution, and PI. After you define the criteria, the resulting report lists all grants that meet your specifications. Hyperlinks on the screen provide more detailed information about each grant. The Grant Search menu is shown in **Figure 3**.

**Figure 3.** Grant Search menu

Note	Search Hints are available by clicking on the hyperlinked search criteria.
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### Specifying Search Criteria:

#### Search – Current Grants or All Grants

Choose “Current Grants” or “All Grants” from the drop-down menu. “Current Grants” will search within the set of grants that have not yet expired as of the current date. This is the default choice. “All Grants” tells NaviGRANT to disregard the end dates and search regardless of project dates.

#### Market Basket

Use the drop-down menu to specify a particular Market Basket. Market Baskets are simply pre-defined research areas or categories that already have keywords associated with them. These Market Baskets were created in consultation with researchers at Indiana University and provide an easy way to locate grant awards in several popular research areas.

Basic Research and Clinical are the top level of Market Baskets and there are several “sub” Market Baskets contained within the larger categories. One or multiple market baskets may be selected for searching at the same time. Simply hold the SHIFT key while clicking to select multiple, contiguous categories. Hold the CONTROL key while selecting non-contiguous categories.

#### Source

Confine results to specific sources by selecting a single or multiple source names. Canadian sources are indicated by (CAN) following the source name. The default is ALL.



### Principal Investigator (PI) Name

Confine results to a specific researcher name by entering either a full last name or just the first few letters. This field matches searches using the first characters of the last name field. Only a single search criterion (word, partial word, or phrase) can be inputted into this field at one time.

Example	.Entering Wu will return:	Entering dav will return:
	<ul style="list-style-type: none"> <li>• Wu, Gordon D.</li> <li>• Wu, Lingtao</li> <li>• Wulff, Heike</li> </ul>	<ul style="list-style-type: none"> <li>• Davidson, Eric</li> <li>• Davis, Michael</li> <li>• Davern, Timothy</li> </ul>

### State / Province

The default selection of “All” will not restrict any searches based on a specific country, state or province. To restrict searches to the United States or Canada, simply make those selections in the drop down menu. You may make multiple contiguous or non-contiguous selections by using the SHIFT or CONTROL keys as mentioned above.

### Organization Name

Unlike the Researcher name field, this search locates all matches to the character string in the field, regardless of where in the name it appears. Confine results to specific institutions by entering the name or partial name in the box. Only a single search criterion (word, partial word, or phrase) can be inputted into this field at one time.

Search Hint	Confine your results to specific institutions by entering the name or partial name within the box.
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Enter the first few letters of the desired institution and your results will return any organizations **that contain those letters within any word in the organization name.**

Example	.Entering univ will return:	Entering john will return:
	<ul style="list-style-type: none"> <li>• University of San Diego</li> <li>• San Diego State University</li> </ul>	<ul style="list-style-type: none"> <li>• Johns Hopkins University</li> </ul>

### Organization Type

Use this field to identify those grants awarded to an organization of a specific type, such as commercial, medical center/research institute, government or a foundation. Academic institutions such as universities are contained within the medical center/research institute category.

### Award Within

This drop-down menu lets you search for grants that have been awarded within 30, 60, 90, or 180 days of the current date. The default choice is ALL, which will include all grants regardless of the date of award.

## Grant Ending

This drop-down menu lets you search for grants that have an end date within 30, 60, or 90 days of the current date. The default choice is ALL, which will include all grants regardless of the ending date.

## City

Confine results to specific cities by entering the name or partial name in the box. Only a single search criterion (word, partial word, or phrase) can be inputted into this field at one time. Enter the first few letters of the desired city and your results will return any grants located in the cities that contain the string of characters you specified.

## Full-Text Keyword Search

This search parameter enables you to identify which grants contain desired terms within the Title, Abstract and Key Term Field for each grant record. Using the Microsoft Search algorithm, you can specify single word terms or multiple word terms or phrases. You can even use a wildcard symbol to make it easy to search for different variations of the phrase. The wildcard symbol is “\*”.

**Phrases and any terms that include a wildcard symbol must be contained in double quotes** as the examples below show.

Example	“site directed mutagenesis” or “cell*”
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When searching for multiple keywords, you can use these search term connectors:

AND – Use between the search words or phrases to search for grants containing all indicated terms. (*Example:* cellular AND pathogenesis)

OR – Search for grants containing any of the specified terms. (*Example:* replication OR transcriptional)

AND NOT – Eliminate grants containing the term indicated after the search phrase. (*Example:* astrocytes AND NOT pseudotype)

NEAR – Search for grants that have keywords within proximity of each other. (*Example:* hypothesis NEAR investigation)

## Grant Number

If you know a specific or partial grant number, you can search for it using this field. Simply select whether the grant number contains, starts with or ends with your search term and type your search term into the adjacent box. You can also use this to identify NIH grants from specific agencies, taking advantage of the coding system for that institution. For more information on that, go to the NIH Reference Guide in the Quick Launch menu on the NaviGRANT Start Page.

## Territory / Region (Custom Only)

NaviGRANT can customize a search field based on sales regions or territories, by zip code or by state. For more information, contact [info@navigrant.com](mailto:info@navigrant.com).

## Grant Search - Generate a Report

After the desired report criterion has been selected, click **Run Report** to generate the report. **Figure 4** provides a sample report output. NaviGRANT makes even more detailed information available by selecting report elements that are hyperlinked.

**Generate Report**

**Export to Excel**

**Results Header**

**Expand List**

Organization Name (408)	PI Name (7530)	Project Title (9239)	Grant Number	Award	Award Date	End Date	Source
<b>CALIFORNIA</b>							
ABO BIOQUEST INC (1)	<a href="#">Ding, Zhenjun</a>	<a href="#">A Photostable Fluorescent Probe For Imaging Live Cells Alternative To Quantum Dot</a>	IR43MH083813-01	\$100,000	7/1/2008	6/30/2009	NIH
ABRATECH CORPORATION (1)	<a href="#">Jewett, Don L</a>	<a href="#">Error Reduction in Dipole-Source Localization Models</a>	SR44NS041776-03	\$392,243	9/17/2006	4/30/2009	NIH
ACELOT INC (2)				\$423,250			

**Figure 4.** Sample Grant Search report

Selecting the (+) and (-) symbols to the left of the organization name will produce a list of the individual grants meeting the specified criteria from that organization.

**Results Header and Organization Totals** The number in parentheses ( ) next to the organization name, principal investigator name, and project title in the column headers signifies the number of unique grants within that category for the search. The number next to the Organization indicates the number of grants selected via your criteria for the location.

## Primary Report Output

- Organization Name**  
 Provides the name of the organization receiving the grant. The organizations are listed in alphabetical order with the associated grants as a subcategory.
- Principal Investigator (PI)**  
 Provides the name of the PI or researcher associated with the grant. By clicking on the hyperlinked name, you can drill down to see the available contact information, and a listing (if applicable) of all grants associated with that researcher, regardless of source or the status of grant (current or expired).

- **Project Title**

The Project Title of the grant award is listed with the results. Clicking on the hyperlinked Title enables you drill down to see the full abstract and list of keywords. It also offers important grant facts such as award amount and date, grant number, and project start/end dates in a convenient single-page format

- **Grant Number**

Provides the complete identifying grant number. NaviGRANT captures the original grant number if available. Otherwise, NaviGRANT assigns a grant number to keep track of all associated and related information.

- **Award**

Provides the specific dollar figure of the grant award, if it is available from the source. The Grant Award is the total award for the entire period of the project, not an annual grant award.

Note	Selecting the NIH link on the Quick Launch menu (along the left-hand margin of the NaviGRANT home page) provides a breakdown and explanation of NIH grant and contract award codes.
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- **Award Date**

Lists the date the grant was awarded.

- **End Date**

Provides the expiration date of the grant.

- **Source**

Identifies the source of the grant award.

## Exporting Report Output

Select the Excel logo in the top right portion of the output screen (**Figure 4**) to convert the report's contents to a spreadsheet format for saving and/or printing. The data can also be sorted, printed, merged, and analyzed in Excel.

## Print the Report

Select the printer icon on the lower right of the Grant Search menu to print the report in the default screen format (**Figure 4**). Note: if you print directly from the screen, not from Excel, you will have less flexibility to customize the output to your liking.

## Grant Summary

Use the Grant Summary Report to view grant and award totals for the last 3 years by organization within your selected geographic area. This is a great report for providing an overview of relative funding within a geographic area such as a state or city. You are also able to designate a specific market basket so that you can see where the funding is for a specific area of research.

The screenshot shows the NaviGRANT home page. The navigation menu at the top includes Home, User Guide, Grant Search, Org Snapshot, MB Summary, and New Award. The 'Grant Search' dropdown menu is open, showing 'Grant Search' and 'Grant Summary'. A blue box highlights 'Grant Summary', and a callout line points to it with the text 'Selecting Grant Summary From Home Page'. Below the navigation, the 'NaviGRANT Reports' section lists various reports, with 'Grant Summary' (description: 'Find grant award amount summaries by market basket and timeframe') also highlighted.

## Specifying Search Criteria

The screenshot shows the 'Grant Summary' form. It includes dropdown menus for 'Market Basket(s)' (with 'Basic Research' selected), 'Source' (with 'NIH-National Institutes of Health' selected), 'State' (with 'All' selected), and 'City'. A 'Run Report' button is visible on the right. Callouts point to the dropdown menus with the text 'Select Criteria' and to the 'Run Report' button with the text 'Generate Report'.

## Report Results

This Report contains columns that enable you to sort simply by clicking on the column header. For instance, if you want to get a list organized by grants awarded in 2008, just click on the top of that column. The data will reorganize itself from the highest to lowest dollar amount.

The screenshot shows the 'Grant Summary' report results. At the top, there are dropdown menus for 'Market Basket(s)' (with 'Basic Research' selected), 'Source' (with 'NIH-National Institutes of Health' selected), 'State' (with 'All' selected), and 'City'. A 'Run Report' button is visible. Below the form is a table with columns for Organization, City, State, Zipcode, 2006 \$, 2006 #, 2007 \$, 2007 #, 2008 \$, and 2008 #. A callout points to the 'Export to Excel' button with the text 'Export Report'. Another callout points to the '2008 #' column header with the text 'Click on Headers To Sort By column'.

Organization	City	State	Zipcode	2006 #	2006 \$	2007 #	2007 \$	2008 #	2008 \$
UNIVERSITY OF CALIFORNIA SAN FRANCISCO	SAN FRANCISCO	CALIFORNIA	94143	1158	\$395,732,300	1204	\$455,345,387	871	\$326,956,326
UNIVERSITY OF CALIFORNIA LOS ANGELES	LOS ANGELES	CALIFORNIA	90024	1049	\$382,220,229	1035	\$372,326,353	731	\$256,758,072
UNIVERSITY OF CALIFORNIA SAN DIEGO	LA JOLLA	CALIFORNIA	92093	920	\$347,824,681	899	\$337,301,475	657	\$256,650,299
STANFORD UNIVERSITY	STANFORD	CALIFORNIA	94305	920	\$342,045,857	934	\$329,136,405	623	\$223,681,760
SCRIPPS RESEARCH INSTITUTE	LA JOLLA	CALIFORNIA	92121	547	\$219,658,988	493	\$204,953,900	329	\$135,317,639
UNIVERSITY OF SOUTHERN CALIFORNIA	LOS ANGELES	CALIFORNIA	90033	385	\$149,753,145	394	\$157,069,693	269	\$118,851,929
UNIVERSITY OF CALIFORNIA BERKELEY	BERKELEY	CALIFORNIA	94720	420	\$152,281,051	410	\$116,523,929	287	\$114,680,542

# Organization Snapshot

Use Organization Snapshot to collect, organize, and analyze graphically the grants received by specific organizations.



Figure 5. Organization Snapshot

## Specifying Search Criteria

From the Organization Snapshot search menu, select the organization you are interested in by typing the first few letters of the organization name into the selection box. The string will be matched with organizations that have a similar string of characters, wherever they appear in the name. You will be presented with all the possible choices in a Hot List. Simply choose the single organization that you want to report on and it will populate the field. All organizations that have received a grant are listed in the drop-down menu alphabetically. Then select a time period, either the year or a specific quarter

## Generate a Report

Figure 5 provides a sample Organization Snapshot report output. The following are displayed graphically:

- A summary profile of the organization’s top market baskets for that year
- A graph of the award totals announced for each quarter to enable one to review year-to-year and quarter-to-quarter award trends.
- The target organization’s top new grant awards and the top grants that are ending for that specified period. Grants are hyperlinked to enable one to click on the title and drill down to see the grant details.

This information answers key questions, such as:

- What are the top fields of research in which this organization is involved?
- What levels of funding are these efforts attracting?
- What is this organization's historical record of success for attracting grant awards?

Two separate categories of specific grant awards for the target organization are listed in the bottom half of the report:

- Top New Awards for Quarter
- Top Grants Ending Next Quarter

In both categories, the following additional information is summarized in list format for the target organization:

#### **Principal Investigator (PI)**

Lists the PI's organization, contact information, and a listing (if applicable) of additional grants received. To access this page, click on the hyperlinked name anywhere the name is underlined.

#### **Award Amount**

Provides the specific dollar figure of the grant award.

#### **Department**

Provides the PI's department name.

#### **Award Date**

Provides the date the grant was awarded.

#### **Project Title**

Clicking on the hyperlinked Title will provide a comprehensive summary of the project receiving the grant. Award amount, dates, and grant number are also listed.

#### **Market Basket**

Lists the market basket (field of research) category of the grant. Some grants belong to more than one market basket. In those cases, an ellipse is displayed after the market basket that is most representative.

## **Printing and Exporting Report Output**

Select the printer icon on the lower right of the Organization Snapshot menu to print the report in the default screen format. You can also export the report to PDF for a higher quality print copy.

Similar to Grant Search, use the Export drop-down menu on the lower portion of the Organization Snapshot menu to export the report using a variety of formats. Exporting the report in a PDF format enables one to retain an intact copy or email a copy to a

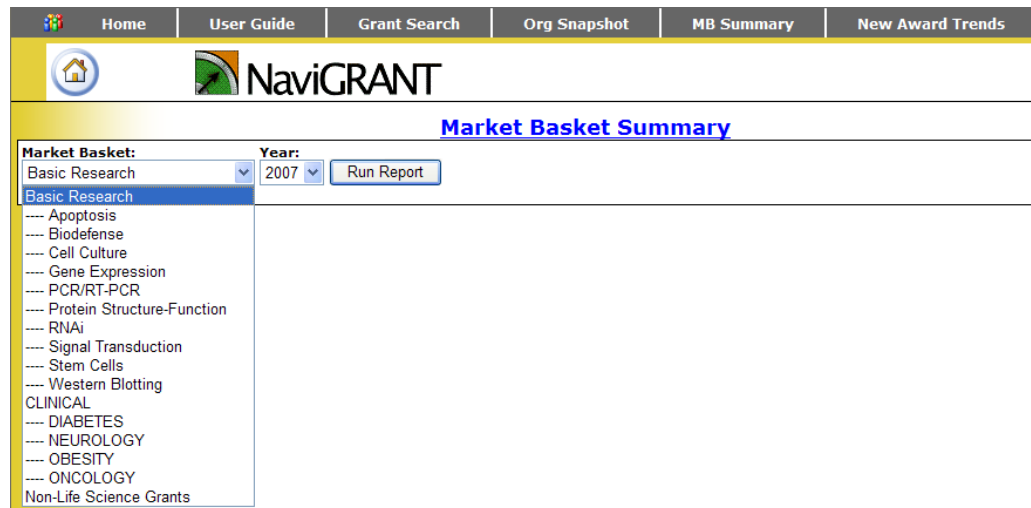
colleague. Exporting in Excel format enables one to copy and paste the individual graph elements, ideal for incorporating this information in other documents.

## Market Basket Summary

Market Basket Summary lets you track the funding trends of pre-defined Market Baskets by year and institution. **Figure 6** shows the Market Basket Summary search menu.

The Market Basket drop-down search menu shows some of the pre-defined Market Baskets in NaviGRANT, including apoptosis, biodefense, cell culture, gene expression, PCR/RT-PCR, signal transduction, protein structure/function, stem cells, western blotting, and RNAi.

Note	Market Baskets in the Basic Research Areas can be in both upper and lower case letters while clinical research Market Baskets appear only in upper case. Individual grants can belong to one, multiple, or no Market Baskets, based on the research area specified in their grant submission.
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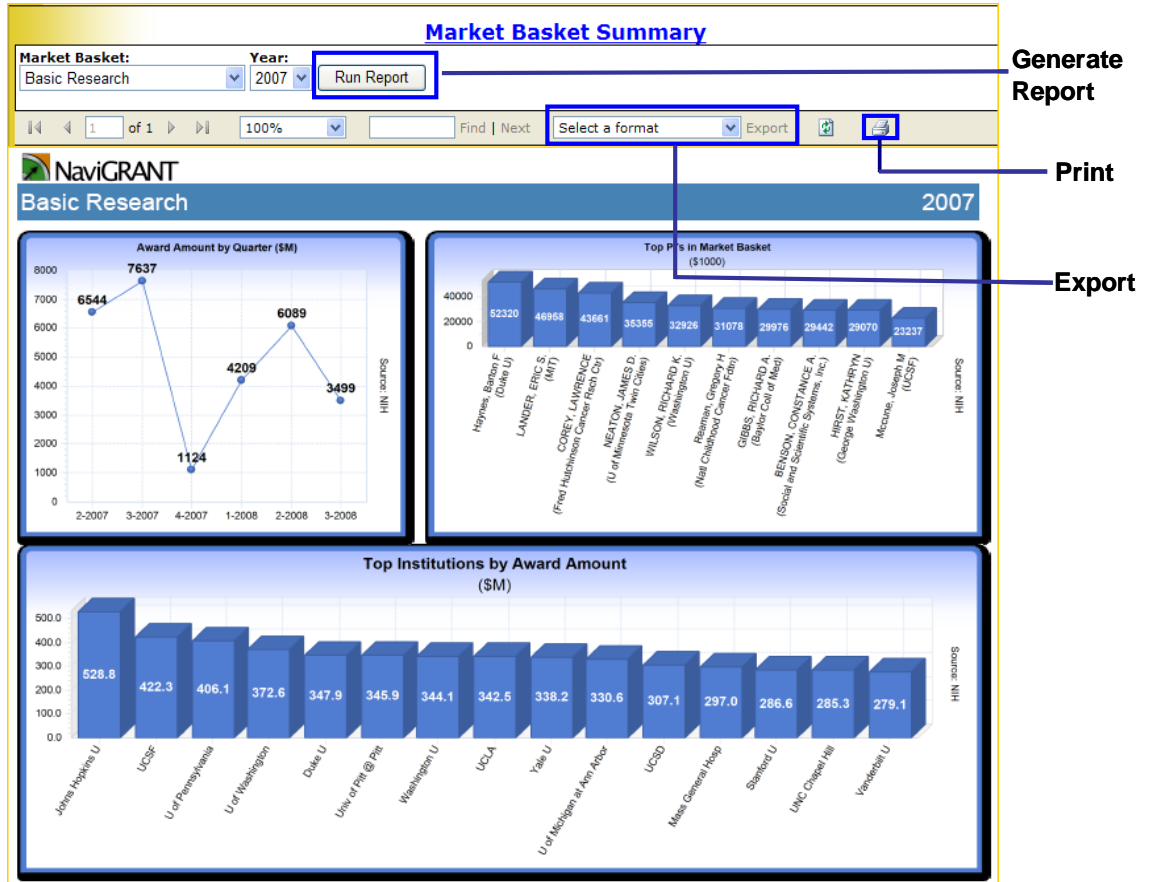


**Figure 6.** Market Basket search menu



## Generate a Report

Use the drop-down menus to select a single Market Basket and timeframe of interest (by year). After the desired report criterion has been selected from the menu, click **View Report** to generate the report. **Figure 7** provides a sample Market Basket Summary report output.



**Figure 7.** Market Basket Summary – report output

The Market Basket Summary has the following information displayed graphically:

- Grant funding for the specified Market Basket for the last 6 Quarters
- The top ten principal investigators receiving grant awards in the specific Market Basket - arranged from largest to smallest
- Top institutions receiving the most award funding for the specified Market Basket.

Market Basket Summary examines raw historical data and uses NaviGRANT’s trending function to answer key questions:

- Is funding for the subject field of research increasing, steady, or decreasing?
- Who are the top PIs engaged in this field of research, at what institutions are they located, and how much grant money do they receive?

- What are the top organizations sponsoring research in this particular field, arranged by total grant amounts received?

## Printing and Exporting Report Output

### Print the Report

Select the printer icon on the lower right edge of the Market Basket search menu in order to print the report in the default screen format.

### Export the Report

Use the Export drop-down menu on the lower portion of the Market Basket search menu to export the report in either PDF or Excel. Exporting in Excel will allow you to cut and paste individual graph windows for Word or PowerPoint presentations.

## New Award Trends Summary

The New Award Trends Summary enables you to identify new funding trends by reviewing new announced awards from NIH within each market basket. You can use it to supplement and verify the market intelligence generated by other NaviGRANT reports.

### Specifying Search Criteria

Use the drop-down menus to customize the New Award Trends Summary report by timeframe (year and quarter). **Figure 9** provides a sample New Award Trends Summary report output. The following are displayed graphically:

- New grants by Market Basket for the current quarter.
- Top institutions by quarterly award amount for all Market Baskets.
- New grants amounts by Market Basket – compared side by side with the same quarter from the previous year.

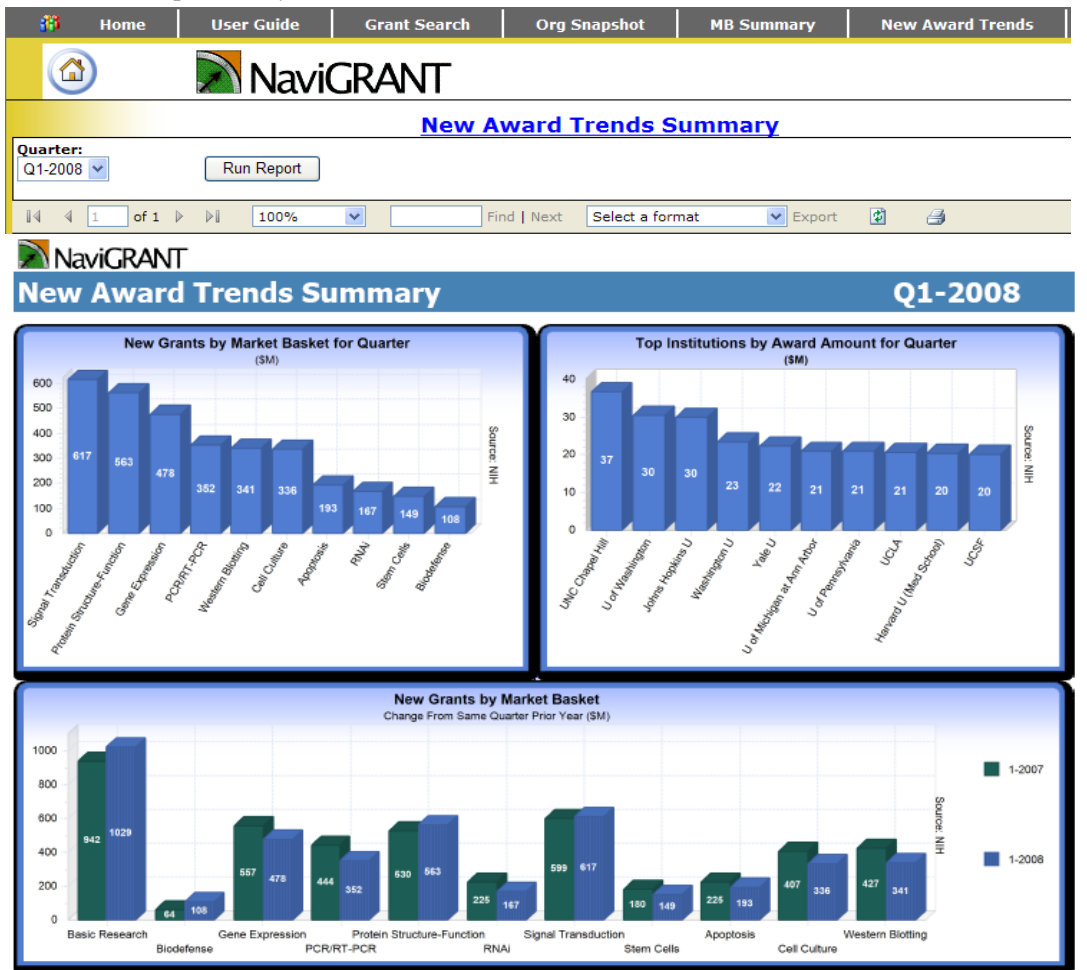
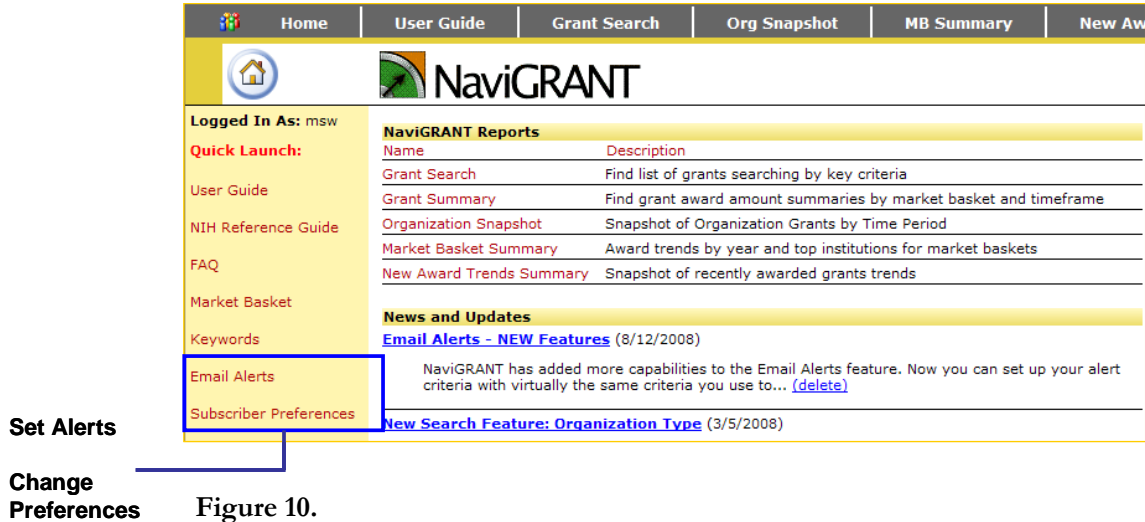


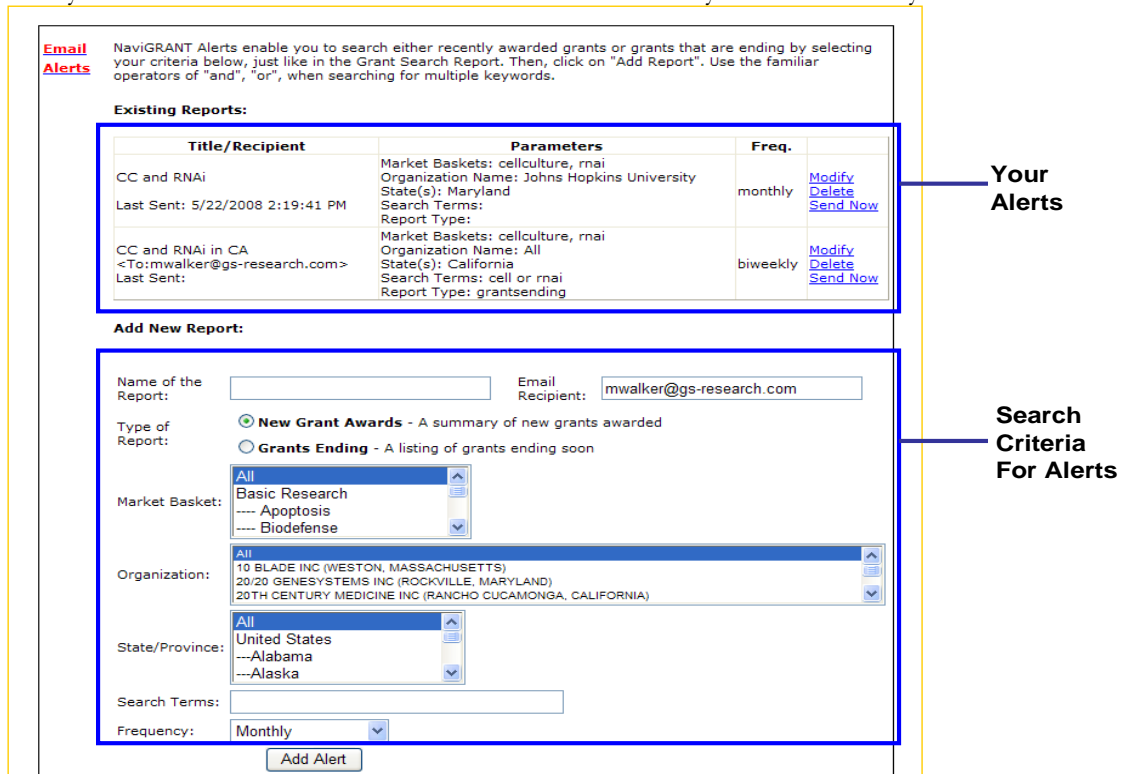
Figure 9. Newly Awarded Trends - Summary Report

## Grant Alerts and Subscriber Preferences

Set Grant Alerts and Change Subscriber Preferences by accessing the Quick Launch menu along the left margin of the NaviGRANT home page (Figure 10). This links to NaviGRANT’s customized search agent and automatic grant award email notification capability.



NaviGRANT lets you customize the search criteria that will search for new grant awards on a regular basis and automatically deliver it to your email address. The search criteria are very similar to the Grant Search Criteria which makes it very intuitive and easy to use.



Set your criteria, name your report, confirm what email to use and then select “Add Alert”. Notifications of new grant awards meeting those criteria will be emailed to you at the frequency you specify. Email notification intervals can be biweekly, monthly, or quarterly.

Users can define multiple reports based on varied Market Baskets, organizations, and geographical locations. All reports are listed under the Existing Reports section of the User Preferences screen (Figure 11). Reports can also be deleted by selecting the word Delete located to the right of each report title.

## Subscriber Preferences – Changing your Password

The screenshot shows the NaviGRANT web interface. At the top, there is a navigation bar with links: Home, User Guide, Grant Search, Org Snapshot, MB Summary, and New Award Trends. Below this is a header with the NaviGRANT logo and the text "Logged In As: msw". A sidebar on the left contains a "Quick Launch" section with links to User Guide, NIH Reference Guide, FAQ, Market Basket, and Keywords. The main content area is titled "Subscriber Preferences" and contains a form for changing the password. The form has three input fields: "Existing Password:", "New Password:", and "Re-type New Password:". A "Change Password" button is located at the bottom right of the form.

To change your password, simply insert your existing password and then submit your new password. Confirm it by re-typing it in the indicated field. NaviGRANT requires a password of at least 8 characters. It’s a great idea to use both letters and numbers, too. If you have any problems, contact us at [info@navigrant.com](mailto:info@navigrant.com).

## To Subscribe

If you have any questions about purchasing this product, please contact:



**G & S DISCOVERY**

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Vice President

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**NaviGRANT**