Table of Contents

1. Introduction.................................................................................................................. 5
   1.1. About Funding Institutional.................................................................................... 5
   1.2. Browser requirements............................................................................................. 6
2. Getting started................................................................................................................ 7
   2.1. Creating a new Elsevier account.......................................................................... 7
       2.1.1. Registering with Funding Institutional............................................................ 8
   2.2. Logging in to Funding Institutional........................................................................ 8
       2.2.1. Log in via your institution............................................................................... 8
       2.2.2. Retrieving your username and password......................................................... 8
   2.3. Change password................................................................................................... 8
3. Search for Opportunities............................................................................................... 10
   3.1. Opportunities quick search................................................................................... 10
   3.2. Advanced Opportunities search............................................................................ 10
       3.2.1. Refine your search.......................................................................................... 11
       3.2.2. Adding search terms....................................................................................... 12
       3.2.3. Using Boolean operators with your search.................................................... 12
       3.2.4. Search tips..................................................................................................... 12
   3.3. Limited submission................................................................................................ 13
       3.3.1. Filter by Limited submission......................................................................... 13
   3.4. Browse Research disciplines................................................................................. 13
       3.4.1. Browse by Research disciplines...................................................................... 13
       3.4.2. Keyword browse of Research disciplines...................................................... 14
   3.5. Browse Funding types............................................................................................ 14
       3.5.1. Browse by Funding types............................................................................... 15
       3.5.2. Available Funding Types in Funding Institutional........................................... 15
   3.6. Browse Funder type............................................................................................... 16
       3.6.1. Browse by Funder type.................................................................................. 16
       3.6.2. Available Funder types in Funding Institutional.............................................. 18
   3.7. Browse Applicant types........................................................................................ 19
       3.7.1. Browse by Applicant types.............................................................................. 19
       3.7.2. Available Applicant types in Funding Institutional........................................... 19
   3.8. Search for a Funder country.................................................................................... 20
       3.8.1. Entering an Funder country.......................................................................... 21
   3.9. Browse Application Deadline................................................................................. 21
       3.9.1. Browse by Application Deadline.................................................................... 22
   3.10. Browse Amount.................................................................................................... 22
       3.10.1. Entering an amount....................................................................................... 22
   3.11. Search for an Opportunity Funder....................................................................... 23
       3.11.1. Entering a Funder name.............................................................................. 23
4. Search for Awards......................................................................................................... 24
   4.1. Awards quick search.............................................................................................. 24
   4.2. Awards Advanced search...................................................................................... 24
4.2.1. Refine your search ................................................................. 25
4.2.2. Adding search terms .......................................................... 26
4.2.3. Using Boolean operators with your search ............................ 26
4.3. Browse Research disciplines .................................................. 26
  4.3.1. Browse by Research disciplines ........................................ 27
  4.3.2. Keyword browse of Research disciplines ............................ 27
4.4. Browse Awarded Institution .................................................. 28
  4.4.1. Browse by Awarded Institution ....................................... 28
4.5. Browse Awarded Researcher .................................................. 28
  4.5.1. Browse by Awarded Researcher ...................................... 28
4.6. Browse Recipient Country .................................................... 29
  4.6.1. Browse by Recipient Country ....................................... 29
4.7. Search for an Award Funder .................................................. 30
  4.7.1. Entering a Funder name .............................................. 30
4.8. Browse Funder type ............................................................. 30
  4.8.1. Browse by Funder type .............................................. 30
  4.8.2. Available Funder types in Funding Institutional .................... 31
4.9. Browse Funding types ......................................................... 32
  4.9.1. Browse by Funding types .............................................. 32
  4.9.2. Available Funding Types in Funding Institutional ................. 33
4.10. Browse Award start year ...................................................... 34
  4.10.1. Entering an amount .................................................. 34
4.11. Browse Awarded Researcher ............................................... 34
  4.11.1. Browse by Award start year ...................................... 34
5. **Search for Funders** ............................................................ 35
  5.1. Funders quick search ....................................................... 35
  5.2. Funders Advanced Search ................................................ 35
  5.3. Search for a Funder country ............................................. 36
    5.3.1. Entering an Funder country ..................................... 36
  5.4. Browse Funder type ........................................................ 36
    5.4.1. Browse by Funder type .......................................... 36
    5.4.2. Available Funder types in Funding Institutional .............. 37
6. **Exporting search results** ..................................................... 38
  6.1. Exporting funding opportunities, awards or funders ............... 38
    6.1.1. Exporting awarded opportunities, awards, or funders from a results list ........ 39
7. **Adding opportunities as favorites** ........................................... 40
  7.1. Using Favorites to track opportunities .................................. 40
    7.1.1. Creating Favorites from a results list ......................... 40
    7.1.2. Creating Favorites from an opportunity details page ......... 40
    7.1.3. Viewing Favorites ................................................ 40
    7.1.4. How to untrack Favorites ....................................... 41
8. **Saving your Searches** ........................................................ 42
  8.1. How to save a search ..................................................... 42
    8.1.1. Viewing saved searches .......................................... 42
    8.1.2. Deleting a saved search ........................................ 43
    8.1.3. Editing a saved search .......................................... 43
9. Managing your account

9.1. How to view or edit your Personal details

9.1.1. Change your Funding Institutional password
1. Introduction

1.1. About Funding Institutional

Funding Institutional is a single-source workflow tool containing funder, funding opportunity, and awarded grants data, helping institutional staff with:

- Insight in key funding trends
- Discovery of relevant opportunities
- Decisions on resource allocation

Funding Institutional is developed for institutional staff who analyze the funding landscape and manage the search and selection process and supports institutional staff across the workflow.

Get insight into the funding landscape

Attain an in-depth understanding of the funding landscape using Funding Institutional overviews. Country level overviews show funded research and future funding opportunities, while research area overviews highlight research areas attracting funding. Get insight into past records of success by looking at overviews detailing fund recipients, and past funds won by your peers and competitors.

Identify funding opportunities

Search for funding opportunities by research area, keywords, or researcher profiles. You can track opportunities by adding bookmarks and saving favorites. Time-saving features allow you to review, save, and re-use your search histories, and notifications alert you to new funding opportunities.

Select funding opportunities

Assess your eligibility to apply for funds by reviewing past successes for your institution. Funding Institutional will look at awarded grant history and identify funders who previously awarded grants to your institution.

Disseminate opportunities

Disseminate opportunities to eligible researchers in your institution using publication history and past success rates with the funder. Funding Institutional will limit applications to the number most likely to succeed and allows you to control your communications by:

- setting automatic notifications,
- enriching communications by manually adding information, and
- sharing communications through a variety of channels.

Build teams

Funding Institutional helps identify potential collaborators in your institution by looking at publication history and past success in winning grants with the selected funder.

Track, report, and manage

Use Funding Institutional to track and report your activities as you move
through the funding process. You can export intelligence to help with funding landscape analysis, download metrics, track activities around funding opportunities, and create reports to monitor shared alerts and recommendations.

1.2. Browser requirements

We support the latest versions of Mozilla® Firefox® and Google Chrome™ on Microsoft Windows and Mac OS X and latest version of Safari on MAC OS X. Also, we have support for Internet Explorer version 10 and higher.

- Other operating systems and browsers may also be able to access Elsevier products; however, the Elsevier E-Helpdesk cannot provide expert advice or technical support to solve problems you may encounter when using these systems.
- Beta or test versions of browsers are not supported.
2. Getting started

To get started with Funding Institutional, go to www.fundinginstitutional.com.

- In order to use Funding Institutional, you must first create an Elsevier account by registering. Once registered, you may then log into funding Institutional.
- If you already have an Elsevier account with another product, such as Scopus, you may use the same login credentials to log into Funding Institutional.

2.1. Creating a new Elsevier account

Registering with Funding Institutional is a quick, one-time activity which enables your use of the tool. You can later view or edit the information you enter on the Registration form by clicking Personal details.

**NOTE** You will only be able to register if your institution has access to Funding Institutional and you are connecting from your institution's IP address. If your institution is not yet part of Funding Institutional, you can only gain access to the portal once they acquire a license.
2.1.1. Registering with Funding Institutional

From the Funding Institutional Home page, click Register now. The Funding Institutional Registration page opens.

1. Enter your personal details, email address, and password. Your password must:
   - Be between 5-20 characters long
   - Contain at least 1 uppercase character, e.g., A, B C, etc
   - Contain at least 1 lowercase character, e.g., a, b, c, etc.
   - Contains at least 1 numeric character, e.g. 0, 1, 2, 3, etc.) OR special character such as ~ ! @ # $ % ^ & * _ + { } | : " < > ? ` - = [ ] \ ; ’ , . /
2. Click the checkbox for “I have read and understood the Registered User Agreement” (mandatory).
   
   Note To proceed with creating a new account, you must first read and accept the terms and conditions.
3. Click the checkbox if you would like to receive emails about future updates, releases, or related products (optional).
4. Click Create account.

After completing these steps, you will receive an email confirming your registration.

2.2. Logging in to Funding Institutional

In order to log into Funding Institutional, you need to:

- Have created an Elsevier account.
- Be inside the access range of your IP or institution.

2.2.2. Log in via your institution

When you open Funding Institutional, you will be immediately prompted to either sign in, or register.

1. Enter your email address. Your account information is stored based upon the email address you used for registration.
2. Enter your password.
3. Click Sign in.

2.2.3. Retrieving your username and password

If you do not remember your username or password, click Forgot your username or password?. Funding Institutional prompts you to enter your email address. Upon entering your email address, you will receive an email with a link to reset your password.

2.3. Change password

If you would like to change your password, click your username at the top right of Funding Institutional.
1. Click Change password. The Change Password page opens.
2. Enter your current password and then enter your new password twice, confirming they are the same.
3. Click **Submit** to save your new password.
3. Search for Opportunities

After logging into your account, you will be redirected to the Funding Institutional Home page where you can begin searching for Funding Opportunities, Awarded Grants (Awards), or Funders.

3.1. Opportunities quick search

To conduct an Opportunities quick search, enter terms within a search field and click Search. A list of results will open once the search is completed.

Note: Searching by keywords is optional; you can leave this field empty and search for all available content.

3.2. Advanced Opportunities search

Funding Institutional provides you with a more advanced search based on terms you enter relating to funding opportunities.

1. From the Funding Institutional home page, click Search at the top navigation bar. The opportunities search page opens with an initial list of opportunities.

2. In the Search field, enter your search term.

As you enter your search term, Funding Institutional refines your list of opportunity results.
3.2.1. Refine your search

You may refine your search by selecting an option from the **All fields** drop-down menu.

Available menu items are:

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>All fields</td>
<td>Searches through all details of opportunities.</td>
</tr>
<tr>
<td>Title</td>
<td>Searches only in the titles of opportunities</td>
</tr>
<tr>
<td>Abstract</td>
<td>Searches only in the abstracts of opportunities</td>
</tr>
<tr>
<td>Opportunity number</td>
<td>Searches only external IDs of opportunities. An external ID is one assigned to an opportunity by the funding body.</td>
</tr>
<tr>
<td>Funder</td>
<td>Searches only opportunities with this funder name</td>
</tr>
</tbody>
</table>
3.2.2. Adding search terms

You may add more search terms by adding additional keyword entry rows. You can select various fields for each row while setting up your search.

For example, you may use one search field to search titles, and another to search abstracts.

![Search interface](image)

3.2.3. Using Boolean operators with your search

While adding additional search rows, you have the option to use Boolean operators, And, Or, And not, with your search.

![Boolean operators](image)

3.2.4. Search tips

- The Boolean operator AND narrows your search so you will see fewer funding opportunities, while OR broadens your search, resulting in more listed opportunities.
• Using the singular form of a word in your search finds both the singular and plural forms for most words. For example, heart attack finds results listing heart attack and heart attacks.

• To find documents where your search terms appear together, enclose your phrase in double quotes. For example, “stem cell” returns documents with both stem and cell. Without double quotes, stem cell returns documents with the words stem and cell throughout the document and not necessarily together.

3.3. Limited submission

Use the Limited submission filter to narrow your search to show only opportunities with a limited submission.

A limited submission is a restriction set by funders on the number of applications that may be submitted by an institution in response to a given opportunity. In such cases, institutions may decide to open an internal procedure to select the final applications that may be submitted.

3.3.1. Filter by Limited submission

1. Click Limited submission to open the filter setting.
2. Select to filter your results list by opportunities that are considered limited submissions. Your results list will update based upon your selection.

3.4. Browse Research disciplines

Research discipline browsing is available in Funding Institutional and is based on ASJC classification. ASJC codes are assigned to funding opportunities in order to define areas of interest and narrowing the scope of interest for search using Funding International. The complete list of ASJC codes may be found in the Appendix of this document.

3.4.1. Browse by Research disciplines

1. Click Research disciplines to browse Research disciplines available on Funding Institutional. Research disciplines expands.
2. Click on a Research discipline to view available sub-categories, if necessary.
3. Click **More** to view more Research disciplines, if necessary.

4. Select a sub-category Research discipline of interest.
   
   Your results list will update based upon your selection.

![Research disciplines screenshot](image)

### 3.4.2. Keyword browse of Research disciplines

1. Click **Research disciplines** to open the list of available Research disciplines available on Funding Institutional. Research disciplines expands.

2. In Filter by name of research discipline, enter a search term into the field. The Research disciplines listing updates as you type the keyword.

3. You can either select a sub-category indicating the research discipline of interest or you can select all sub-categories. Your results list will update based upon your selection.

![Research disciplines screenshot](image)

### 3.5. Browse Funding types

Funding Institutional distinguishes Funding types based upon types of research available for Funding opportunities.
3.4.1. Browse by Funding types

1. Click **Funding types** to browse different types of funding opportunities available on Funding Institutional. Funding types expands.
2. Click **More** to view more Funding types, if necessary.
3. Click one or more Funding types. Your results list will update based upon your selection.

The numbers next to each Funding type indicate how many opportunities there are currently available.

3.4.2. Available Funding Types in Funding Institutional

<table>
<thead>
<tr>
<th>Funding type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel and Conferences</td>
<td>The Travel and Conferences Fundings serve to fund the development and hosting of or travel to a scientific conference. Travel Fundings assist the awardee with transportation and accommodation while attending scientific group meetings.</td>
</tr>
<tr>
<td>Equipment and facilities</td>
<td>This mechanism is designed to purchase, maintain or upgrade research equipment or lab facilities.</td>
</tr>
<tr>
<td>Artistic pursuit</td>
<td>The Artistic Pursuit Fundings are awarded to those who incorporate arts and/or culture into their projects and thus promote the development of culture and an individual’s development through culture.</td>
</tr>
<tr>
<td>Prizes</td>
<td>Prizes can be both monetary and non-monetary. Non-monetary prizes are symbolic means to communicate that contributions are valued and appreciated.</td>
</tr>
<tr>
<td>Contract, tender, or cooperative agreement</td>
<td>In order to receive this Funding, it is necessary to indicate a substantial federal scientific or programmatic involvement.</td>
</tr>
</tbody>
</table>
Substantial involvement means that after receiving an award, the scientific or program staff will assist, guide, coordinate, or participate in project activities.

### Research and publications
This award supports discrete, specified, researcher-initiated projects to be performed by named investigators in areas representing their specific interest and competency. Publications, such as scientific articles or academic theses are also included in this category.

### Fellowships, scholarships, or training
Fellowship and Scholarships awards are designed to commence or develop the scientific education of the awardee. Training awards are to support the research training of scientists for career development, as well as help professional schools establish, expand, or improve programs of continuing education.

### Programs and projects
These awards are designed to support a broadly based, multidisciplinary, often long-term research program which has a specific objective or basic theme. A program project/center-gran award involves the organized efforts of relatively large groups, members of which are conducting research projects designed to elucidate the various aspects or components of an objective.

### 3.5. Browse Citizenship

Funding Institutional provides a means to search for opportunities based upon a researcher’s citizenship. In some cases, citizenship within a Funding awarding country is necessary.

You can add multiple countries as you search.

#### 3.5.1. Browse by Citizenship
1. Click Citizenship to open a text entry field to search for a country.
2. Type in a country name. The Citizenship module autocompletes with a list of countries meeting your entered search term.
3. For each listed country of interest, select Add to include the country in your search.
4. If necessary, repeat steps 2 and 3

Your results list will update based upon your text entry.
3.6. Browse Funder type

Use the Funder type tool to select opportunities from one or more types of funders.

The Funder's type refers to the funder’s main purpose of operation and reflects the main activities which the funder engages.

3.6.1. Browse by Funder type

1. Click Funder type to open a list of types available on Funding Institutional.
2. Select one or more check box(es) next to a type to use within your search.

Your results list will update based upon your selection.
# 3.6.2. Available Funder types in Funding Institutional

<table>
<thead>
<tr>
<th>Funder type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governmental Organizations</td>
<td>Government institution that operates at a national level or governmental institution that operates at sub-national level, meaning at the level of a federal state, province, country region or city.</td>
</tr>
<tr>
<td>Business and Industry</td>
<td>A profit-undertaking company, business, or industry engaged in entrepreneurial, economic, and commercial operation at a national or international level.</td>
</tr>
</tbody>
</table>
| Foundations                  | A nonprofit nongovernmental organization that provides funds and other types of support to other organizations, individuals or for own charitable purposes.  
                                 | Private foundations derive its financial resources from a family, an individual, or a corporation. In the United States, private foundations must disclose all grantees and Funding amounts in its IRS Form 990-PF.  
                                 | Public foundations derive funds from public sources, receive Fundings from individuals, governments and private foundations. In the United States, a Funding making public foundation or charity isn’t subject to this disclosure requirement, so access to its funding data will depend on how much the funder is willing to share with the public. |
| Nonprofit Organizations and Charities | Nonprofit nongovernmental organizations (also called non-business entity) that do not fall under any of the categories above.                                                                 |
| International Organizations  | An organization with international membership. These include both governmental organizations and non-governmental, nonprofit organizations that operate internationally.                                                |
| Professional Associations and Societies | A professional association whose objective is to promote academic discipline, advance a particular profession, or advance the interests of individuals in a profession |
| Academic Institutions        | An institution whose main activity consists of providing education, conducting research, and granting degrees. These include both public and private education establishments. |
3.7. Browse Applicant types

Funding Institutional provides a means to locate opportunities based academic or personal circumstances influencing the eligibility of your application. Some opportunities target individuals with certain academic background, while some opportunities target specific groups of individuals who might be perceived as disadvantaged.

3.7.1. Browse by Applicant types

1. Click Applicant types to open a list of available applicant types.
2. For each listed Applicant type of interest, select the check box to include the applicant type in your search.
   
   Your results list will update based upon your selection.

3.7.2. Available Applicant types in Funding Institutional

<table>
<thead>
<tr>
<th>Applicant type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Institutions</td>
<td>An institution whose main activity consists of providing education,</td>
</tr>
<tr>
<td></td>
<td>conducting research, and granting degrees. These include both public and</td>
</tr>
<tr>
<td></td>
<td>private education establishments.</td>
</tr>
<tr>
<td>Commercial Organizations</td>
<td>Opportunities where commercial organizations are eligible to apply.</td>
</tr>
<tr>
<td></td>
<td>These are for profit organizations (other than small business) and can</td>
</tr>
<tr>
<td></td>
<td>be referred to as industry or companies.</td>
</tr>
<tr>
<td>Category</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Early Career and New Faculty Researchers</td>
<td>Denotes experience and encompasses professionals considered inexperienced or as emerging in their field. These opportunities include postdoctoral awards, new, young, emerging, and early career investigator awards, or junior faculty awards. The requirement is used across all disciplines. For example, an emerging artist award will be classified as “new Faculty/New Investigator.”</td>
</tr>
<tr>
<td>Graduate Students</td>
<td>Anyone currently in graduate school working towards a master’s degree or a doctorate, but who has not yet received a doctorate. This type is also relevant for undergraduate students looking for funding opportunities for their future graduate studies.</td>
</tr>
<tr>
<td>Local or State Governments</td>
<td>Opportunities where local or state governments are eligible to apply.</td>
</tr>
<tr>
<td>Non-profit Organizations</td>
<td>Opportunities that non-profit organizations are eligible to apply. Non-profit organizations can also be referred to as charities or NGO’s.</td>
</tr>
<tr>
<td>Mid-Career and Experienced Researchers</td>
<td>Anyone who already owns a Ph.D., is an experienced researcher, or anyone who is considered professional in his or her field. E.g. artists, architects, lawyers, journalists, nurses, librarians, medical doctors.</td>
</tr>
<tr>
<td>Minorities</td>
<td>Opportunities for which ONLY minorities may apply. This includes minority institutions, or minority owned businesses. For U.S. sponsors, a minority is defined in terms of U.S. government guidelines or standards. Likewise, non-U.S. sponsors follow their countries’ national guidelines or standards when defining the term minority.</td>
</tr>
<tr>
<td>Persons with Disabilities</td>
<td>Opportunities for which ONLY disabled individuals may apply, or where disabled persons have a preference in the application process.</td>
</tr>
<tr>
<td>Small and Medium Businesses</td>
<td>Opportunities where small businesses (SME) are eligible to apply.</td>
</tr>
<tr>
<td>Undergraduate Students</td>
<td>Anyone currently in school working towards a bachelor’s degree.</td>
</tr>
<tr>
<td>Women Only</td>
<td>Opportunities for which ONLY women may apply, or where women have a preference in the application process.</td>
</tr>
</tbody>
</table>

### 3.8. Search for a Funder country

Use the Funder country tool to search for opportunities offered by a specific country.
3.8.1. Entering an Funder country

1. Click Funder country to open the search entry field.
2. Enter a search term within the entry field. As soon as you start entering a term, Funding Institutional lists funding countries based upon your text entry.
3. Select a funding country from the list based upon your term entry. The country’s name displays as selected.
4. Repeat steps 2 and 3 to add additional funding countries to your search. Your results list will update according to your selections.

3.9. Browse Application Deadline

Funding Institutional provides a means to search for opportunities based on the deadline for submitting an application. The Application Deadline filter considered only the closest, upcoming deadline based upon your selection.

Funding Institutional provides only the deadline date itself, so if you are concerned about the specifics of the deadline, be sure to review the full description of the opportunity itself to determine the actual type of deadline for the opportunity. Generally, there are two types of deadlines:

**LOI deadline**  Whether an opportunity has an LOI deadline depends upon the agency’s requirements. Some agencies do not use LOI’s for their projects.

*Note: Funding Institutional excludes LOI deadlines in the search and only operates with application deadlines.*

**Application deadline**  This is the actual application deadline, or date for submitting an application. There might be several application deadlines. For example, if an opportunity is recurring.

*Note: Opportunities with “Deadline not specified” are opportunities that are usually recurring, continuing, or open until filled. Review the full description of the opportunity, or go to the full announcement to find more information about the opportunity’s upcoming deadline.*
3.9.1. Browse by Application Deadline

1. Click Application Deadline to open the filter.
2. Select one or more suggested date indicators. If you select this option, the interacting calendar will be disabled.
3. Enter a Start date and an End date for the application deadline. This option is not available if you select one of the suggested date indicators.
   Your results list will update according to your selections.

![Application Deadline Filter](image)

3.10. Browse Amount

Use the Amount filter to enter the Minimum and Maximum amount of an opportunity award.

3.10.1. Entering an amount

1. Click Amount to open the filter.
2. In Minimum amount in USD, enter the minimum amount of an opportunity award in US dollars.
3. In Maximum amount in USD, enter the maximum amount of an opportunity award in US dollars.
   Your results list updates opportunities based upon the Minimum and Maximum US dollar entries.
3.11. Search for an Opportunity Funder

Use the Funder tool to search for opportunities offered by a specific funder.

3.11.1. Entering a Funder name

1. Click Funder to open the search entry field.
2. Enter a search term within the entry field. As soon as you start entering a term, Funding Institutional lists funders based upon your text entry.
3. Select a funder from the list based upon your term entry. The funder’s name displays as selected.
4. Repeat steps 2 and 3 to add additional funders to your search.
   Your results list updates opportunities based upon your funder selections.
4. Search for Awards

Funding Institutional provides the option to view awards which were previously granted. Considering the awards might help you identify opportunities relevant to your research.

For example, you may view all awards granted to your institution in the past and decide whether your current project has an opportunity similar to previous awards.

4.1. Awards quick search

Funding Institutional provides you with a keyword search based on terms you enter relating to previously granted awards.

To conduct a keyword search, enter terms within a search field and click Search. A list of results will open once the search is completed.

Note: Searching by keywords is optional; you can leave this field empty and search for all available content.

4.2. Awards Advanced search

Funding Institutional provides you with a more advanced search based on terms you enter relating to the awards.

1. From the Funding Institutional home page, click Search on the top navigation bar and make sure Awards is selected. The Funding Institutional Start your search page opens with an initial list of available awards.

2. In the Search field, enter your search term.

As you enter your search term, Funding Institutional refines your list of awards results.
4.2.1. Refine your search

You may refine your search by selecting an option from the All fields drop-down menu.

Available menu items are:

<table>
<thead>
<tr>
<th>Field</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>All fields</td>
<td>Searches through all details of awards.</td>
</tr>
<tr>
<td>Title</td>
<td>Searches only in the titles of awards.</td>
</tr>
<tr>
<td>Abstract</td>
<td>Searches only in the abstracts of awards.</td>
</tr>
<tr>
<td>Awardee</td>
<td>Searches only in the awarded researchers of awards.</td>
</tr>
<tr>
<td>Awarded institution</td>
<td>Searches only in the awarded institutions of awards. Awarded institutions</td>
</tr>
<tr>
<td></td>
<td>are institutions that received an award, or the institution where an awarded research</td>
</tr>
<tr>
<td></td>
<td>er was affiliated to.</td>
</tr>
<tr>
<td>Grant ID</td>
<td>Searches only external IDs of awards. An external ID is one assigned to an</td>
</tr>
<tr>
<td></td>
<td>opportunity by the funding body.</td>
</tr>
<tr>
<td>Funder</td>
<td>Searches only awards with this funder name</td>
</tr>
</tbody>
</table>
4.2.2. Adding search terms

You may add more search terms by adding additional keyword entry rows. You can select various fields for each row while setting up your search.

For example, you may use one search field to search titles, and another to search abstracts.

![Search terms example](image)

4.2.3. Using Boolean operators with your search

While adding additional search rows, you have the option to use Boolean operators, And, Or, And not, with your search.

![Boolean operators example](image)

4.3. Browse Research disciplines

Research discipline browsing is available in Funding Institutional and is based on ASJC classification. ASJC codes are assigned to awards in order to define areas of interest and narrowing the scope of interest for search using Funding International. The complete list of ASJC codes may be found in the Appendix of this document.
4.3.1. Browse by Research disciplines

1. Click **Research disciplines** to browse Research areas available on Funding Institutional. Research disciplines expands.

2. Click on a Research discipline to view available sub-categories, if necessary.

3. Click **More** to view more Research disciplines, if necessary.

4. You can either select a sub-category indicating the research discipline of interest or you can select all sub-categories. Your results list will update based upon your selection.

4.3.2. Keyword browse of Research disciplines

1. Click **Research disciplines** to open the list of available Research disciplines available on Funding Institutional. Research disciplines expands.

2. In **Filter by name of research discipline**, enter a search term into the field. The Research discipline listing updates as you type the keyword.

3. You can either select a sub-category indicating the research discipline of interest or you can select all sub-categories. Your results list will update based upon your selection.
4.4. Browse Awarded Institution

Funding Institutional provides a means to search for Awards based upon an Awarded Institution, or an institution which has received an award.

You can add multiple institutions as you search.

4.4.1. Browse by Awarded Institution

1. Click Awarded Institution to open a text entry field to search for an institution.
2. Type in an institution name. The Awarded Institution module autocompletes with a list of institutions meeting your entered search term.
3. For each listed institution, select Add to include the institution in your search.
4. If necessary, repeat steps 2 and 3.
   Your results list will update based upon your selected items.

4.5. Browse Awarded Researcher

Funding Institutional provides a means to search for Awards based upon an Awarded Researcher, or a researcher who has received an award.

You can add multiple researchers as you search.

4.5.1. Browse by Awarded Researcher

1. Click Awarded Researcher to open a text entry field to search for a researcher.
2. Type in a researcher name. The Awarded Researcher module autocompletes with a list of researchers meeting your entered search term.
3. For each listed researcher, select Add to include the researcher in your search.
4. If necessary, repeat steps 2 and 3.
   Your results list will update based upon your selected items.
4.6. Browse Recipient Country

Funding Institutional provides a means to search for Awards based upon a Recipient Country. If the award was received by one or more researchers, then the Recipient Country is the country of the institution the Principal Investigator was affiliated to. If the award was received by an institution, then the Recipient Country is the country of that institution.

You can add multiple recipient countries as you search.

4.6.1. Browse by Recipient Country

1. Click Recipient Country to open a text entry field to search for a country.
2. Type in a country name. The Recipient Country module autocompletes with a list of countries meeting your entered search term.
3. For each listed country, select Add to include the country in your search.
4. If necessary, repeat steps 2 and 3.

Your results list will update based upon your selected items.
4.7. Search for an Award Funder

Use the Funder tool to search for awards offered by a specific funder.

4.7.1. Entering a Funder name

1. Click Funder to open the search entry field.
2. Enter a search term within the entry field. As soon as you start entering a term, Funding Institutional lists funders based upon your text entry.
3. Select a funder from the list based upon your term entry. The funder’s name displays as selected.
4. Repeat steps 2 and 3 to add additional funders to your search.
   Your results list updates opportunities based upon your funder selections.

4.8. Browse Funder type

Use the Funder type tool to select awards from one or more types of funding.

The Funders type refers to the funder’s main purpose of operation and reflects the main activities which the funder engages.

4.8.1. Browse by Funder type

1. Click Funder type to open a list of types available on Funding Institutional.
2. Select one or more check box(es) next to a type to use within your search.
   Your results list will update based upon your selection.
### 4.8.2. Available Funder types in Funding Institutional

<table>
<thead>
<tr>
<th>Funder type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governmental Organizations</td>
<td>Government institution that operates at a national level.</td>
</tr>
<tr>
<td>Business and Industry</td>
<td>A profit-undertaking company, business, or industry engaged in entrepreneurial, economic, and commercial operation at a national or international level.</td>
</tr>
<tr>
<td>Foundations</td>
<td>A nonprofit nongovernmental organization that provides funds and other types of support to other organizations, individuals or for own charitable purposes. \nPrivate foundations derive its financial resources from a family, an individual, or a corporation. In the United States, private foundations must disclose all grantees and grant amounts in its IRS Form 990-PF. \nPublic foundations derive funds from public sources, receive Fundings from individuals, governments and private foundations. In the United States, a Funding making public foundation or charity isn’t subject to this disclosure requirement, so access to its Funding data will depend on how much the funder is willing to share with the public.</td>
</tr>
<tr>
<td>Nonprofit Organizations and Charities</td>
<td>Nonprofit nongovernmental organizations (also called non-business entity) that do not fall under any of the categories above.</td>
</tr>
<tr>
<td>International Organizations</td>
<td>An organization with international membership. These include both governmental organizations and non-governmental, nonprofit organizations that operate internationally.</td>
</tr>
<tr>
<td>Professional</td>
<td>A professional association whose objective is to promote academic</td>
</tr>
<tr>
<td>Associations and Societies</td>
<td>discipline, advance a particular profession, or advance the interests of individuals in a profession</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Academic Institutions</strong></td>
<td>An institution whose main activity consists of providing education, conducting research, and granting degrees. These include both public and private education establishments.</td>
</tr>
</tbody>
</table>

**4.9. Browse Funding types**

Funding Institutional distinguishes Funding types based upon types of research available for Funding awards.

**4.9.1. Browse by Funding types**

1. Click **Funding types** to browse different types of funding available on Funding Institutional. Funding types expands.
2. Click **More** to view more Funding types, if necessary.
3. Click one or more Funding types.
   
   Your results list will update based upon your selection.

The numbers next to each Funding type indicate how many awards there are currently available.
### 4.9.2. Available Funding Types in Funding Institutional

<table>
<thead>
<tr>
<th>Funding type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Travel and Conferences</strong></td>
<td>The Travel and Conferences Fundings serve to fund the development and hosting of or travel to a scientific conference. Travel Fundings assist the awardee with transportation and accommodation while attending scientific group meetings.</td>
</tr>
<tr>
<td><strong>Equipment and facilities</strong></td>
<td>This mechanism is designed to purchase, maintain or upgrade research equipment or lab facilities.</td>
</tr>
<tr>
<td><strong>Artistic pursuit</strong></td>
<td>The Artistic Pursuit Fundings are awarded to those who incorporate arts and/or culture into their projects and thus promote the development of culture and an individual’s development through culture.</td>
</tr>
<tr>
<td><strong>Prizes</strong></td>
<td>Prizes can be both monetary and non-monetary. Non-monetary prizes are symbolic means to communicate that contributions are valued and appreciated.</td>
</tr>
<tr>
<td><strong>Contract, tender, or cooperative agreement</strong></td>
<td>In order to receive this Funding, it is necessary to indicate a substantial federal scientific or programmatic involvement. Substantial involvement means that after receiving an award, the scientific or program staff will assist, guide, coordinate, or participate in project activities.</td>
</tr>
<tr>
<td><strong>Research and publications</strong></td>
<td>This award supports discrete, specified, researcher-initiated projects to be performed by named investigators in areas representing their specific interest and competency._Publications, such as scientific articles or academic theses are also included in this category.</td>
</tr>
<tr>
<td><strong>Fellowships, scholarships, or training</strong></td>
<td>Fellowship and Scholarships awards are designed to commence or develop the scientific education of the awardee. Training awards are to support the research training of scientists for career development, as well as help professional schools establish, expand, or improve programs of continuing education.</td>
</tr>
<tr>
<td><strong>Programs and projects</strong></td>
<td>These awards are designed to support a broadly based, multidisciplinary, often long-term research program which has a specific objective or basic theme. A program project/center-gran award involves the organized efforts of relatively large groups, members of which are conducting research projects designed to elucidate the various aspects or components of an objective.</td>
</tr>
</tbody>
</table>
4.10. Browse Amount

Use the Amount filter to enter the Minimum and Maximum amount of an award.

4.10.1. Entering an amount

1. Click Amount to open the filter.
2. In Minimum amount in USD, enter the minimum amount of an opportunity award in US dollars.
3. In Maximum amount in USD, enter the maximum amount of an opportunity award in US dollars.

Your awards results list updates based upon the Minimum and Maximum US dollar entries.

![Amount Filter](image)

4.11. Browse Award start year

Funding Institutional provides a means to search for awards based on the year an award will be started or granted for use

4.11.1. Browse by Award start year

1. Click Award start year to open the filter.
2. Select one or more start years.

Your results list will update according to your selections.

![Award Start Year Filter](image)
5. Search for Funders

Funding Institutional provides the option to locate and view grant funders.

5.1. Funders quick search

Funding Institutional provides you with a keyword search to locate Funding institutions awarding grants.

To conduct a keyword search, enter terms within a search field and click Search. A list of results will open once the search is completed.

Note Searching by keywords is optional; you can leave this field empty and search for all available content.

5.2. Funders Advanced Search

Funding Institutional provides you with a more advanced search based on terms you enter relating to funders.

1. From the Funding Institutional home page, click Search on the top navigation menu, and ensure Funders is selected. The Funding Institutional Start your search page opens with an initial list of funding institutions.

2. In the Search field, enter your search term.

As you enter your search term, Funding Institutional refines your list of funding institution results.
5.3. Search for a Funder country

Use the Funder country tool to search for funding institutions from a specific country.

5.3.1. Entering an Funder country

1. Click **Funder country** to open the search entry field.
2. Enter a search term within the entry field. As soon as you start entering a term, Funding Institutional lists funding countries based upon your text entry.
3. Select a funding country from the list based upon your term entry. The country's name displays as selected.
4. Repeat steps 2 and 3 to add additional funding countries to your search. Your results list will update according to your selections.

![Funder country search interface](example)

5.4. Browse Funder type

Use the Funder type tool to locate funding institutions from one or more types.

The Funders type refers to the funder's main purpose of operation and reflects the main activities which the funder engages.

5.4.1. Browse by Funder type

1. Click **Funder type** to open a list of types available on Funding Institutional.
2. Select one or more check box(es) next to a type to use within your search. Your results list will update based upon your selection.
### 5.4.2. Available Funder types in Funding Institutional

<table>
<thead>
<tr>
<th>Funder type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governmental Organizations</td>
<td>Government institution that operates at a national level.</td>
</tr>
<tr>
<td>Business and Industry</td>
<td>A profit-undertaking company, business, or industry engaged in entrepreneurial, economic, and commercial operation at a national or international level.</td>
</tr>
<tr>
<td>Foundations</td>
<td>A nonprofit nongovernmental organization that provides funds and other types of support to other organizations, individuals or for own charitable purposes. Private foundations derive its financial resources from a family, an individual, or a corporation. In the United States, private foundations must disclose all grantees and grant amounts in its IRS Form 990-PF. Public foundations derive funds from public sources, receive Fundings from individuals, governments and private foundations. In the United States, a Funding making public foundation or charity isn't subject to this disclosure requirement, so access to its Funding data will depend on how much the funder is willing to share with the public.</td>
</tr>
<tr>
<td>Nonprofit Organizations and Charities</td>
<td>Nonprofit nongovernmental organizations (also called non-business entity) that do not fall under any of the categories above.</td>
</tr>
<tr>
<td>International Organizations</td>
<td>An organization with international membership. These include both governmental organizations and non-governmental, nonprofit organizations that operate internationally.</td>
</tr>
<tr>
<td>Professional Associations and Societies</td>
<td>A professional association whose objective is to promote academic discipline, advance a particular profession, or advance the interests of individuals in a profession</td>
</tr>
<tr>
<td>Academic Institutions</td>
<td>An institution whose main activity consists of providing education, conducting research, and granting degrees. These include both public and private education establishments.</td>
</tr>
</tbody>
</table>
6. Exporting search results

Funding Institutional provides the option to export funding opportunities, awarded grants or funders and save them as a XLS file.

6.1. Exporting funding opportunities, awards or funders

You may export opportunities, awards or funders directly from a search results list.

When exporting funding opportunities, the export format is XLS. The following information is included in your exported XLS file:

- Funding number
- Title
- Opportunity URL address
- Description
- Funder
- Funder profile URL address
- Amount
- Country
- Deadline
- Hyperlink to source

When exporting awarded Fundings, the following information is included in your XLS file:

- Funding number
- Title
- Awarded Funding URL address
- Institution name
- Principal investigator
- Description
- Funder
- Funder profile URL address
- Amount
- Currency
- Start date
- End date

When exporting funders, the following information is included in your XLS file:
6.1.1. Exporting awarded opportunities, awards, or funders from a results list

To export items from a search results list, complete the following:

1. From your results list, select one or more list items to email. If you want to select all the opportunities on the page (page limit is 20) or if you want to select all the opportunities that resulted from your search (the upper limit for this selection is 2000) you can use the toggle “Select All” button. From the drop-down next to the toggle button, you can choose whether you want the opportunities on the page or all the related opportunities.

2. From the results list, click **Export**. Once you click Export, the selected items from your results list will be available to save as a XLS file.

3. Click **Save**.

   Your XLS file of selected items will be saved to your local network or computer.
7. Adding opportunities as favorites

Funding Institutional provides a method to track one or more opportunities of interest by storing them as a Favorite.

7.1. Using Favorites to track opportunities

You have the option to track opportunities as favorites in two methods on Funding Institutional:

There are two ways to add opportunities to your favorite opportunities list:

- You may add items from a search results list as Favorites.
- You may also add a Favorite directly from an opportunity details page.

Once you add a Favorite, the opportunity is marked with a blue star and appears in every page of Funding Institutional (the landing page, the funder page, the search results page, the Tracked opportunities page) with the blue star. This helps you to identify the favourited opportunity easier.

7.1.1. Creating Favorites from a results list

To add items from a search results list, complete the following:

1. From your results list, select one or more list items to add as a Favorite. If you want to select all the opportunities on the page (page limit is 20) or if you want to select all the opportunities that resulted from your search (the upper limit for this selection is 2000) you can use the toggle “Select All” button. From the drop-down next to the toggle button, you can choose whether you want the opportunities on the page or all the related opportunities.
2. From the results list, click **Favorite**.

7.1.2. Creating Favorites from an opportunity details page

To add items from an opportunity details page, complete the following:

1. From your results list, click on an opportunity or award item. The details page opens.
2. From the details page, click **Favorite**.

7.1.3. Viewing Favorites

Your list of Favorites displays as a list of Tracked opportunities, which is available from the My Funding page. For each tracked opportunity, Funding Institutional displays:

- A blue notification symbol indicated the number of new changes or approaching deadlines since the last time you visited the page
- The date when the opportunity was saved
• The title of the opportunity
• The name of the funder
• The amount that can be granted to an awardee (shows corresponding currency in this the opportunity was first announced)

**Note** Funding Institutional indicated tracked opportunities across the web site with an orange star icon close to its title.

To view your Favorites, do the following:

1. From any Funding Institutional page, click **My Funding**. The My Funding page opens. The default display is set to open your Saved searches.
2. From the My Funding page, click **Favorite opportunities**. The list of Favorite opportunities opens.

### 7.1.4. How to untrack Favorites

You have the option to no longer follow a Favorite opportunity by untracking a selection.

To untrack a Favorite from the My Funding page, do the following:

1. From any Funding Institutional page, click **My Funding**. The My Funding page opens. The default display is set to open your Saved searches.
2. From the My Funding page, click **Favorite opportunities**. The list of Tracked opportunities opens.
3. Select the opportunity that you would like to remove as a Favorite.
4. Click **Remove**. A confirmation message opens.
5. Click **Yes**. The opportunity will no longer be available for tracking as a Favorite.

To untrack a Favorite from an Opportunity details page, do the following:

1. Open the Opportunity details page for the Favorite.
2. From the Opportunity details page, click **Unfavorite**. A confirmation message opens.
3. Click **Yes**. The opportunity will no longer be available for tracking as a Favorite.
8. Saving your Searches

When searching for opportunities frequently, saving your search is a convenient way to save work and time. Saving a search in Funding Institutional stores your search criteria so that you can easily re-run your search again in the future.

You also have the option to set alerts based on your saved search, which will keep you informed about new opportunities matching your search criteria.

8.1. How to save a search

To save a search, complete the following:

1. Complete an Opportunities search. Your search results list opens.
2. From the results list, click **Save search/set alert**. The Save this search form opens.
3. In Save as, enter a name for your saved search. Funding Institutional automatically proposes a name for your saved search, but you may edit the name as you please.
4. From **Set alerts**, determine whether or not to receive an alert for updates regarding your saved search.
   If you opt to receive alerts, you must select an **Alert frequency**.
5. Click **shareable link** to copy a hyperlink to this saved search for your personal distribution.
6. Click **Save**.

Your saved search is completed and may be viewed from My Funding.

8.1.1. Viewing saved searches

To view a saved search, complete the following:

1. From any Funding Institutional page, click **My Funding**. The My Funding page opens. Saved searches is selected as the default display.
2. From your Saved searches, you have the option to do one of the following:
   • Review the date the saved search was created.
   • Click the name of the saved search to access the results for that search.
   • Review the total count of opportunities matching the saved search. Review the count of new opportunities matching the saved search, since the last time the results of that search were accessed.
   Click on the results count (total or new) to access the results for the search. The title of new opportunities, since the last time the search results were accessed, will be marked in bold.
   • Click the Edit icon to edit your saved search.
   • Click the Delete icon to remove the saved search.
8.1.2. Deleting a saved search

To delete a saved search, complete the following:

1. From any Funding Institutional page, click **My Funding**. The My Funding page opens. Saved searches is selected as the default display.
2. From your Saved searches, click the Delete icon to remove the saved search. A confirmation message opens.
3. Click **Delete**. The saved search will be removed from Funding Institutional.

8.1.3. Editing a saved search

To update a saved search, complete the following:

1. From any Funding Institutional page, click **My Funding**. The My Funding page opens. Saved searches is selected as the default display.
2. From your Saved searchers, click the Edit icon to edit your saved search. The Save this search form opens.
3. Do one of the following:
   - Change your alert status in **Set alerts**
   - Change the **Alert frequency**
   - Click **Shareable link** to copy a hyperlink for your personal use
4. Click **Save**. Your saved search is updated.
9. Managing your account

Funding Institutional account information and password may be modified by using the account management feature.

9.1. How to view or edit your Personal details

To view or edit your Personal details, complete the following:

1. From any Funding Institutional page, move your cursor over your user name. The account management pop up displays.
2. From the account management pop up, click **Personal details**. The Personal details page opens.
3. Review your account details, or click Update personal details to edit.
4. If editing your account, update where necessary.
5. Click **Update details**.
   Your account details are saved.

9.1.1. Change your Funding Institutional password

Prior to changing your password, please be aware of the following password guidelines:

- Be between 5-20 characters long
- One uppercase alphabetical character, e.g., A, B C, etc.
- One lowercase alphabetical character, e.g., a, b, c, etc.
- One numeric character, e.g. 0, 1, 2, 3, etc.) OR special character such as ~ ! @ # $ % ^ & * _ + { } | : " < > ? ‘ - = [ ] ‘ , . /c

To update your password, complete the following:

1. From any Funding Institutional page, move your cursor over your user name. The account management pop up displays.
2. From the account management pop up, click **Change password**. The Change password page opens.
3. Complete the following:
   - Enter your **Old password**
   - Enter your **New password**
   - Confirm your new password by entering it again
4. Click **Submit**. Your new password will be saved.