Funding Institutional User Guide

September 2021
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Note: User Guide coverage of *Funding Institutional Admins & Editors* begins on Slide 32
Understanding the data

A. Active funding opportunities are sourced following the Elsevier Funding Content Scope & Selection Procedure* and updated daily to ensure for timeliness. As of September 2021, we monitor over 5,000 funding bodies—including government, foundation, charity, academic organization—in over 80 countries to ensure that opportunities are global and comprehensive.

B. Providing insights into prior grant rounds, the awards data goes back to 1954, and, as of September 2021, exceeds 6.7 million awards. As available from the funder, awards data includes the grant title, grant ID, award amount, start and end dates, PI name and grant description.

C. Funder profiles provide a brief description as well as visualizations to provide at-a-glance insights into current opportunities by discipline and funding type.

The Elsevier Funding Content Scope & Selection Procedure is available by linking to https://www.elsevier.com/solutions/funding-institutional/data-sources.
Home page overview

A. The top menu provides access to the advanced **Search** feature, **Suggestions** and **My funding**, which includes access to saved searches, tracked opportunities, and opportunities sent to Pure. Additionally, the **Editors** functions are visible for editors and admins.

B. The **magnifying glass** icon allows you to access the search from any page. The **question mark** icon provides access to the support resources. The **Institution** icon displays the institution with which the user’s login is affiliated. The **Profile** icon provides access to **Account** details, including the ability to change your login credentials and e-mail address, as well as **Roles**, through which admins can create or modify their user’s permissions settings.

C. **Search** provides basic search of opportunities, awards and funders by selecting the respective radio button.

D. Quickly access the **Suggestions** section, the **Analyze awards data** dashboard and the **Tracked opportunities**.

E. The **global map** indicates the geographical distribution of the funders over the world.

F. The **top 5 funders**, based on the number of opportunities on the country of the institution with which the user’s login is affiliated.
A. Provide a basic search term. The basic search searches terms as an ‘any’ search. Therefore, all the keywords entered in the basic search may be potentially found. The round brackets and the Boolean operators AND, OR and NOT in capital letters can also be used in the basic search.

B. Select the respective data type by clicking on the radio button/tab respective to Opportunities, Awards and Funders.
A. Enter keywords in the **All of these words** field. Each keyword must be in the results.

B. Enter keywords in the **Any of these words** field. At least one of these words must be included in the search. Note that this is the same search as the basic search option.

C. Enter keywords in the **None of these words** field. Here, the keywords are excluded, and they must not appear.

D. Enter keywords in the **Prioritized words** field. The search results with these words will be prioritized and appear at top of the results list. The number of results doesn’t change, but the order does according to the prioritized words.
A. Use the respective filters to restrict opportunities by special application features such as Limited Submission, Recurring Opportunities and Internal opportunities. Internal opportunities are created by Administrators and Editors, who have elevated permissions to create, modify and delete internal opportunities, which are only viewable from within an institution.

B. Narrow search results using filters, including Funding type, Applicant citizenship, Applicant country/region affiliation and Activity country/region. For some filters, including Funder country/region, you will need to type in the desired filter term, such as Canada.

C. Exclude data points to refine your search results and find for example only the international funding opportunities.
Search tips

- The basic search includes Boolean Operators in capital letters: AND, OR and NOT and round brackets.
- The wildcard (*) finds multiple words entering a few characters.
- 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 either *stem* or *cell* or *stem* and *cell* throughout the document and not necessarily together.
Working with search results

A. After the initial search has run, **results can be refined** by adding or removing search terms or filtering on aspects such as applicant type and applicant citizenship.

B. Use **Read more** or click on the hyperlinked opportunity title to view the full record.

C. Use the **Save search** feature to automatically receive new opportunities using the same search parameters. Use **Track** to automatically receive opportunity updates. Use **Share** for sharing the opportunity via email or using a static link.

D. Unique to Pure users, selected opportunities can be **exported into Pure**.

E. Click on the three dots to add **Notes** to opportunities which can be viewed by others within your institution. Selected opportunities can be exported via either CSV or XLS for review and analysis.
A. Enter a name to save a search as an automatic alert; you will receive an email notification whenever new opportunities matching your search criteria are added to the opportunities database.

B. Select the Yes radio button to save the search as an alert. Select the No button to simply save the search for recall another time.

C. Select the **frequency** on which the alert should run, *daily, weekly or monthly.*

D. Alert results will be delivered to the email address associated with the login. (See *Home page overview* to learn how to change login credentials.) You can also generate a *shareable link* to share the search/search results with other users within your institution.

Note: The four most recent saved searches can be viewed and clicked from the search for opportunities page to help you save time.
Opportunity overview

DOST AND PCIEERD GRANTS-IN-AID (GIA) PROGRAM
CALL FOR PROPOSALS FOR CY2023 FUNDING

ID: 01920026089 • Research and publications • Last updated: 8 Mar 2021

A. Opportunity data includes the grant title, grant ID (when available from the funder), the funding type, e.g., Research and publications. Additional details include the funder(s), the amount, the deadline, research discipline(s) and a link to the native opportunity announcement page.

B. The description provides an abstract of the opportunity.

C. The eligibility details are drawn directly from the original announcement.

D. When available, the contact information includes an e-mail address through which additional information may be obtained.

E. Opportunities can be tracked to receive updates, shared via email or a shareable link and sent to Pure (uniquely available to Pure users).

F. Notes—viewable only to other users within an institution—can be added to an opportunity or to all of a funder’s opportunities.
A. Click on the **Similar Opportunities** tab of the opportunity’s details page to see up to 10 opportunities defined similar based on the keywords and filters from the initial search and the selected opportunity.

B. Click on thumb up or down to provide a feedback about how similar the opportunity is compared to the selected opportunity.
Should I apply? – Select your institution

Post-Doctoral Fellowship in Heterogeneous Catalysis / Chemical Kinetics / Supercritical Fluids: Development and characterization of different heterogeneous catalysts towards the conversion of CO2 to higher alcohols under supercritical conditions

A. Click on the **Should I apply?** tab of the opportunity's details page and select your institution. You need to select your institution just once.

B. If you want to edit your institution select the **Profile** icon and select **Account**. Type your institution and update it.
Should I apply?

A. Click on the **Should I apply?** tab of the opportunity’s details page to make informed decisions.

B. The respective number of your institution’s awards and award values from the opportunity’s funder over the last five years (if your institution has received awards from the opportunity’s funder).

C. The proportion of awards received by your institution compared to the overall number of awards sponsored by the funder over the last five complete years. If your institution has not received any award from the opportunity’s funder, only the overall number of awards sponsored by the funder over the last five complete years is shown.

D. A list of the institutions, from across the globe, that have received the awards from the funder.

Note: if the awards of the opportunity’s funder are not included in Funding Institutional, the Should I apply? tab does not show B, C and D.
A. **Notes** are available to other users within an institution and can be managed using the Notes feature of the Editors module.

B. Provide details such as a title, any additional information that may be relevant to other users and deadline(s).

C. Add up to ten supplementary documents, up to 10MB each. Acceptable file types include pdf, doc, docx, ppt, pptx, xls, csv, png, jpeg and gif formats.
A. Tracked opportunities can be managed using the Tracked opportunities feature in the My Funding module. Note: All tracked opportunities can be accessed via the home page.

B. Tracked opportunities can be organized into groups, like folders, for easy access and organization.

C. Opportunity updates can be automatically emailed to your e-mail address.

D. Updates to tracked opportunity deadlines can be sent on different schedules: 1 day before, 1 week before, 2 weeks before, 4 weeks before, 6 weeks before and 8 weeks before as well as none.
Sharing opportunities

A. Email the opportunity to colleagues by providing their email address; to add multiple addresses, press Enter on your keyboard after entering each e-mail address.

B. (Optional) Add notes that can be viewed by the colleagues with whom you shared the opportunity.

C. Share an opportunity using a static link to the opportunity record within Funding Institutional; use the Copy link feature to quickly and easily copy the link.
Send to Pure

Selected opportunities can be easily exported from Funding Institutional into Pure. (Note: A separate license to Pure is required for this functionality.)

A. In the **Send to Pure** window, entering a label will help to organize the funding opportunities, and make them more easily retrieved, in Pure.
A. The **My Funding** module provides access to **Saved searches, Tracked opportunities and opportunities Sent to Pure.**

B. **Saved searches** provides the date on which the search was saved, the number of new opportunities the saved search has surfaced since the last time that particular saved search was last viewed and can be edited or deleted. The saved search name is hyperlinked to quickly view the retrieved opportunities.
My Funding – Tracked Opportunities

A. Tracked opportunities are displayed by folder.

B. Tracked opportunities can be untracked and the folder can be deleted.
My Funding – Sent to Pure

A. Opportunities that were sent to Pure are displayed by label.

B. Opportunities sent to Pure can be deleted from the My Funding feature in Funding Institutional.
A. Using Artificial Intelligence and Natural Language Processing, algorithms help to identify Suggested opportunities based on aspects in researchers’ Scopus Author Profile, including research discipline, seniority and location.

B. To get started, click on the Suggestions module, and use the Add a new researcher link to locate relevant funding opportunities for a researcher.

C. Use the On Scopus link to view the researcher’s Scopus Author Profile.

D. To delete a researcher click on Delete the researcher.

For more information on Scopus Author Profiles, please visit https://www.elsevier.com/solutions/scopus/why-choose-scopus/visibility/author-profiles
A. From the *Suggestions* module, click on the *Add new researcher* link.

B. Enter the *researcher's first and last names* as well as the *affiliation*; while *Affiliation* is optional, it can help to refine the results.

C. Alternatively, search for a researcher by *Scopus Author ID* or *ORCID*, both of which are unique to an author, increasing search relevance.

D. Select the seniority. Confirm or edit the *activity country/region* and the *affiliation country/region*. 
Recommended opportunities – Reviewing results

A. A researcher’s recommended opportunities will be displayed. The suggested opportunities are up to 20.

B. As with other opportunities identified in a search, notes can be added to an opportunity, and selected opportunities can be tracked, exported into XLS, shared or sent to Pure.

C. Opportunities that fall outside a researcher’s scope can be removed. If one opportunity is removed an extra one will be displayed. A maximum of 20 opportunities can be replaced with other suggested opportunities (if relevant ones are available).
A. Awards data can be searched via the Awards radio button on the home screen, or…

B. Using the Awards module in Search
Searching Awards – Constructing a search

A. Using the Awards module in Search, enter a search term in the search box.

B. Additional fields can be used. Enter keywords in the **All of these words** field. All these words must be contained in the search. Enter keywords in the **Any of these words** field. At least one of these words must be included in the search. Note that this is the same search as the basic search option. Enter keywords in the **None of these words** field. The keywords are excluded, and they must not appear. Enter keywords in the **Prioritized words** field. The search results with these words will be prioritized and appear at top of the results list.

C. Filters, such as **Awardee Institution**, **Recipient country** and **Funder** can be used to narrow down search results.
A. From the search results page, edit the search by eliminating search terms, adding new terms, or apply filters to refine the results by aspects such as Recipient country, Funding type and Funder.

B. Results of interest can be previewed using the Open preview link.

C. From the search results, clicking on the hyperlinked award title will open the full awards data, such as Grant ID, award value, award start and end dates, awarded institution and PI.

D. Selected awards can be exported into XLS or CSV files.

E. Use the Analyze search results to assess data by Awards by years, Awards by research discipline and Awards by funder types among other visualizations.
Awards Search – Analyzing awards

A. From the search results page, clicking on the **Analyze search results** link will open a new page offering a variety of analytics.

B. Analytics for awards data, including those for **Awards by years**, **Awards by research disciplines** and **Awards by funder types** are among the visualizations displayed.

C. The analytics are interactive, so clicking on any data point will present the underlying data.
A. Funder profiles can be searched via the Funders radio button on the home screen, or...

B. Using the Funders module in Search, funders can be searched by keyword or name in the search box. Results can be targeted by using filters, by Funder country and Funder type.

C. Funder search results include the funder name, funder country as well as the numbers of active opportunities and awarded grants. Open preview provides a brief description of the funder description; the hyperlinked funder name will open the full funder profile.
A. The funder profile includes details such as the totals of active opportunities and awards.

B. The preview window presents up to three of the most recent opportunities and awarded grants. Editors and administrators, who possess elevated permissions, can add notes to all of the funder’s opportunities.

C. The funder description is adapted from the funder’s website, which is accessible by clicking Read more.

D. The funder’s portfolio is presented in data visualizations, which are interactive and connected to the underlying data.
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Funding Institutional User Roles

**Users** can search, save, track & export opportunities

**Editors** have User permissions plus:
- Create/manage internal opportunities
- Add notes to opportunities and funder profiles

**Admins** have User and Editor permissions plus:
- Assign/remove users' Editor/Admin roles
- Provide information as the point-of-contact for FI administration within the institution
A. The Editors module is accessible only for users who have the elevated Editors and Administrators permissions.

B. The Editors module provides access to managing Notes and Internal opportunities.

C. Notes, which are available to view only within the institution, include the title of the note as well as the name of the note's author and the date of the last update to the note.

D. Selected notes can be tracked and exported to XLS.

E. Notes can be edited or deleted.
Opportunity Notes will appear only to other users within the institution.

With an Opportunity Note, you can apply a note to the opportunity. This helps to provide the necessary information to others within your institution without the need to send multiple emails.

An Opportunity Note can provide a general description or information of interest to the internal audience.

Supplementary materials, such as presentations or spreadsheets, can be added to the record, too.
As with the Opportunity Notes, Funder Notes will appear only to other users within the institution.

With a Funder Note, you can apply a note to the funder profile page as well as to all of the funder’s opportunities. Similar to the Opportunity Notes, Funder Notes help to provide the necessary information to others within your institution without the need to send multiple emails.

A Funder Note can provide a general description or information of interest to the internal audience.

Supplementary materials, such as presentations or spreadsheets, can be added to the record, too.
A. **Internal opportunities** is a feature of the Editors and Admins module, and is available only to Editors and Admins, who have elevated privileges. Internal opportunities are available for viewing only within an institution.

B. Internal opportunities can be drafted and published and made active or inactive; modified; or deleted.

C. Selected internal opportunities can be *shared* with others via a static link or emailed as well as *Sent to Pure*.

D. Internal opportunities can be set up using the Create internal opportunities link.
Creating internal opportunities

When creating internal opportunities, providing more detail helps to make the record more easily retrieved in search and gives the necessary information to prospective applicants.

Fields include the opportunity title and ID, funding type, opportunity description, deadlines, award value, applicant eligibility, point of contact name and information and supplementary information that can be added as additional files (up to 10 and in multiple file formats including PDF and XLS.)

Drafts can be saved and published to be made active or inactive.
Managing roles

A. The **Profile** icon, available on the top toolbar, provides access to **Roles**.

B. The **Roles** module, which is accessible to Administrators who have elevated privileges, can be used to manage the Editors as well as other Admins within an institution. Additional Editors and Admins can be set up, and editor and admin permissions can be terminated. It’s optimal to have at least one Admin within an institution.
Roles: Admins & editors

A. From the Roles module, users’ permission settings can be modified to Admins or Editors:

- **Editors** can search, track, export, share, etc., as well as add notes and internal opportunities.
- **Admins** have all the same privileges as Editors plus the ability to manage user roles and add a contact person.

Admins are listed separately from Editors.

Permissions can be modified to **Editor** or **Admin** or removed from roles with elevated privileges.

B. An administration contact person can be added.
Funder Data Requests

For questions regarding funder data, including requests to add specific funders, select the email in the link below:

https://service.elsevier.com/app/answers/detail/a_id/23415/c/10547/supporthub/funding-inst/

See also: Elsevier Funding Content Scope and Selection Procedure