# Table of Contents – Funding Institutional Users

4. Understanding the data  
5. Home page overview  
6. Search overview: Basic  
7. Search overview: Advanced  
8. Search overview: Search Facets  
9. Search tips  
10. Working with search results  
11. Saving searches  
12. Opportunity overview  
13. Adding notes  
14. Tracking opportunities  
15. Sharing opportunities  
16. Send to Pure  
17. My Funding overview and saved searches  
18. My Funding – Tracked opportunities  
19. My Funding – Sent to Pure  
20. My Funding – Recommended opportunities  
21. Recommended opportunities – Adding a new researcher  
22. Recommended opportunities – reviewing results
# Table of Contents – Funding Institutional Users

23. Searching Awards – Search options
24. Searching Awards – Constructing a search
25. Awards Search – Reviewing results
26. Awards Search – Analyzing awards
27. Funder Profiles – Search options
28. Funder Profiles – Overview

Note: User Guide coverage of *Funding Institutional Admins & Editors* begins on Slide 29
A. Active funding opportunities are sourced following the Elsevier Funding Content Scope & Selection Procedure* and updated daily to ensure for timeliness. As of March 2021, we monitor over 4,500 funding bodies—including government, foundation, charity, academic organization—in over 70 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 March 2021, exceeds 7.1 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 and My funding, which includes access to saved searches, tracked opportunities, recommended opportunities, and opportunities sent to Pure. Additionally, the Editors functions are visible, provided you have editor or administrative permissions.

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 and editors 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 most recent Tracked opportunities.

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

F. The top 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.

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.
**Search overview: Search facets**

<table>
<thead>
<tr>
<th>Filter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limited submission</td>
</tr>
<tr>
<td>Recurring opportunities</td>
</tr>
<tr>
<td>Internal opportunities</td>
</tr>
<tr>
<td>Research discipline</td>
</tr>
<tr>
<td>Funding type</td>
</tr>
<tr>
<td>Funder</td>
</tr>
<tr>
<td>Funder country</td>
</tr>
<tr>
<td>Funder type</td>
</tr>
<tr>
<td>Applicant citizenship</td>
</tr>
<tr>
<td>Applicant country affiliation</td>
</tr>
<tr>
<td>Applicant type</td>
</tr>
<tr>
<td>Activity country</td>
</tr>
<tr>
<td>Application deadline</td>
</tr>
<tr>
<td>Amount</td>
</tr>
</tbody>
</table>

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 affiliation** and **Activity country**. For some filters, including **Funder country**, you will need to type in the desired filter term, such as **Canada**.
Search tips

• The search does not include Boolean Operators, i.e., AND, OR and NOT.
• 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 or.
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 **Open preview** to view a snippet of the funding opportunity 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.

D. Add **Notes** to opportunities (and funder profiles) which can be viewed by others within your institution. Selected opportunities can be **exported via CSV into an XLS spreadsheet** for review and analysis or shared via email or using a static link.

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

F. The **Help** feature provides enhancement news as well as search support.
Saving searches

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

A. Opportunity data includes the grant title, grant ID (when available from the funder), the funding type, e.g., Research and publications; and date of last update. 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 email 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. **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: The three most recently-updated opportunities will be available for viewing, with linked access to all tracked opportunities, 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.
A. Selected opportunities can be easily exported from Funding Institutional into Pure. (Note: A separate license to Pure is required for this functionality.)

B. In the resulting Send to Pure window, entering a label will help to organize the funding opportunities, and make them more easily retrieved, in Pure.
**My Funding Overview and Saved Searches**

A. The **My Funding** module provides access to **Saved searches**, **Tracked opportunities**, opportunities **Sent to Pure** and **Recommended opportunities**.

B. **Saved searches** provides the date on which the search was saved, the number of 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.
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.
My Funding – Recommended opportunities

A. Using Artificial Intelligence and Natural Language Processing, algorithms help to identify **Recommended opportunities** based on aspects in researchers’ Scopus Author Profile, including research discipline, career stage and location.

B. To get started, use the **Add a new researcher** link to locate relevant funding opportunities for a researcher.

C. Use the **View profile in Scopus** link to view the researcher’s Scopus Author Profile.

D. To delete a researcher from the **Recommended opportunities** researcher list, click .

For more information on Scopus Author Profiles, please visit [https://www.elsevier.com/solutions/scopus/why-choose-scopus/visibility/author-profiles](https://www.elsevier.com/solutions/scopus/why-choose-scopus/visibility/author-profiles)
Recommended opportunities – Adding a new researcher

A. From the **Recommended opportunities** feature, click on the **Add new researcher** link, located on the Recommended opportunities section of My Funding.

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. Use the radio button to select the researcher from the results list, and click Add researcher. View recent publications can help to verify the researcher.
Recommended opportunities – Reviewing results

A. A researcher’s recommended opportunities will be displayed, up to 20 opportunities.

B. Opportunities can be reviewed using the Open preview link or by clicking on the opportunity name to look at the full record.

C. 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.

D. Opportunities that fall outside a researcher’s discipline can be removed. Sending feedback as to why the opportunity doesn’t suit the researcher, from research discipline to career level, will help to retrain the algorithm used to identify the recommended opportunities.
Searching Awards – Search options

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 **Recipient country**, **Funding type** and **Funder** can be used to focus 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 file formats.

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.
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.
Funder Profiles – Search options

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.
Funder Profiles - Overview

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 recently-awarded grants. Editors and administrators, who possess elevated permissions, can add noted 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.
Table of Contents – Funding Institutional Admins & Editors

30. Funding Institutional user roles
31. Editors module & notes
32. Opportunity Notes
33. Funder Notes
34. Internal opportunities
35. Creating internal opportunities
36. Managing roles
37. Roles: Admins & editors
38. Our 2021 roadmap highlights
39. Funder Data Requests
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
Editors Module & Notes

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 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 so 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 so 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.
Internal opportunities

A. **Internal opportunities** is a feature of the Editors and Admins module, and is available only to Editors and Admins, who have elevated privileges.

B. Internal opportunities are available for viewing only within an institution.

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

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

E. 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 can be set up, and editor and admin permissions can be terminated. It's optimal to have at least one Admin within an institution.
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.

B. Admins are listed separately from Editors.

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

D. From the list of users, new administrative contacts can be selected.
Our 2021 roadmap highlights

Things are off to a great start this year. Already we have introduced several new features:

- **Activity Location** provides you with a new search facet for finding relevant opportunities.
- Improved user experience within the **Opportunity Details** page
- Wildcard search to find multiple keywords using only a few characters

**Coming later in the year:**

- Similar opportunities are now flagged to users based on a relevant search opportunity.
- Autocomplete search functionality
- A simpler, easier, and more accessible user interface
- Insightful awards analytics that are embedded in the **Opportunity Details** page
- Eligibility criteria listed alongside suggested opportunities
- Integration with SciVal
- An enhanced integration with Pure
- Introduction of an API opportunities feed

Learn more by visiting [https://www.elsevier.com/solutions/funding-institutional/releases](https://www.elsevier.com/solutions/funding-institutional/releases)
Funder Data Requests

Questions regarding funder data, including requests to add specific funders:

✉️ fundingoperations@elsevier.com

See also: Elsevier Funding Content Scope and Selection Procedure (https://www.elsevier.com/solutions/funding-institutional/data-sources)