Funding Institutional User Guide
Table of Contents – Funding Institutional Users

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

22. Searching Awards – Search options
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 28
A. Active **funding opportunities** are sourced following the *Elsevier Funding Content Scope & Selection Procedure* and updated daily to ensure for timeliness. As of April 2020, we monitor over 5,300 funding bodies—including government, foundation, charity, academic organizations—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 1965, and, as of April 2020, exceeds 6.4 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.

Home page overview

A. The top menu provides access to the advanced **Search** feature, **My funding**, which includes access to saved searches, tracked opportunities, recommended opportunities, and opportunities sent to Pure; and **Editor** functions (visible only if you have editor or administrative permissions).

B. The **Institution** icon displays the institution with which the use’s login is affiliated. The **Profile** icon provides access to **Account** details, including the ability to change your login credentials and e-mail address; **Roles**, through which admins and editors can create or modify their user’s permissions settings; and access to the **User manual**.

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

D. Quickly access the most recent results for your **Saved searches**, **Tracked opportunities**, and **Recent opportunities**.

E. **Support** provides access to the Funding Institutional Support Center. Clicking on the ? icon, on the top toolbar, will also provide support.
Search tips

- OR is the default connector, and broadens your search, resulting in more listed opportunities.
- AND narrows your search so you will see fewer funding 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 AND cell returns documents with the words stem and cell throughout the document and not necessarily together. If stem cell is searched without double quotes and not using AND, the two terms are connected by OR.
A. Provide a basic search term. Note: Use of Boolean operators, such as AND, OR and AND NOT is available. (Note use of capitalization.)

B. Select the respective data type by clicking on the radio button respective to Opportunities, Awards and Funders.
A. Enter a search term and select in which field to search, e.g., Abstract or Opportunity Number. The default is All fields.

B. For more complex searches use the Add row feature to search additional terms. The default connector is AND, but OR and AND NOT can be selected using the radio buttons.

C. Use the respective filters to restrict opportunities by special application features such as Limited Submission 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.)

D. Narrow search results using the filters, including Funding type and Applicant citizenship. For some filters, including Funder country, you will need to type in the desired filter term, such as Canada.
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 three most recently-updated opportunities meeting saved search requirements will be available for viewing, with linked access to all saved searches, via the home page. Saved searches can be managed using the Saved search feature in the My Funding module.
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 award dollar amount, the deadline, research discipline(s) and a link to the native opportunity announcement page.

B. The description provides a succinct 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 and telephone number 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, deadline, internal contact name, email and telephone number as well as any additional information that may be relevant to other users.

C. Add up to ten (10) supplementary documents, up to 10MB each. Acceptable file types include pdf, doc, docx, ppt, 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. Opportunity updates can be automatically emailed to your e-mail address.

C. 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.

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

A. 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.

B. 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.

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

D. Use the You previously shared this with feature to view the colleagues with whom you previously shared the opportunity.
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.

<table>
<thead>
<tr>
<th>Saved on</th>
<th>Saved as</th>
<th>Opportunities</th>
<th>Actions</th>
</tr>
</thead>
</table>
| 28 Feb 2020| **Finish apps**  
Funding type: Contract, tender or cooperative agreement, Funding type: Fellowships, scholarship | 2342 (758 new) |         |
| 19 Sep 2019| **geriatrics and depression**  
Title: geriatrics and depression, Funder country: United States | 2947 (2094 new) |         |
| 28 Feb 2019| **John D. and Catherine T. MacArthur Foundation**  
Funder: John D. and Catherine T. MacArthur Foundation | 5 (5 new) |         |
| 28 Feb 2019| **Heine Endowments**  
Funder: Heine Endowments | 4 (4 new) |         |
| 16 Jan 2019| **bipolar**  
Keyword: bipolar | 14 (14 new) |         |
| 14 Jan 2019| **alzheimer**  
Keyword: alzheimer | 107 (107 new) |         |
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 and from Pure.
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**; using the **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 Advanced Search
A. Using the Awards module in Advanced Search, enter a search term in the search box; using fields, such as Title, Abstract, and Awarded institution can be used to target a search.

B. Additional rows can be added, and connected with AND, OR or AND NOT Boolean connectors to narrow, broaden or restrict a search.

C. Filters, such as Awarded institution, Funding type, and Funder can be used to focus search results.
Awards Search – Reviewing results

A. From the search results page, edit the search by eliminating search terms, adding new terms using the Search box, or apply filters to refine the results by aspects such as Awarded Institution, Funder or Funder country.

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.
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 discipline**, 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 Advanced 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 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

29. Funding Institutional user roles  
30. Editors module & notes  
31. Opportunity Notes  
32. Funder Notes  
33. Internal opportunities  
34. Creating internal opportunities  
35. Managing roles  
36. Roles: Admins & editors  
37. Our 2020 roadmap highlights  
38. 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
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 to send multiple emails.

An Opportunity Note can provide the name of the internal point of contact, 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.
Funder Notes

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 the name of the internal point of contact, 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 & Admins module, and is available only to Editors & 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.
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.

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 2020 roadmap highlights

• Continued focus on increasing content quality and coverage
• February: Significant improvements in Awards: increasing awarded grants data (1965-date), with a current total of 6.5M awards; new funder country filter; and awards analytics
• March: Integration with Pure, our research information management tool
• Coming soon!
  • New advanced search interface
  • Adding recurring opportunities
  • Filters to identify where research needs to be performed
  • Filtering by an applicant’s affiliation
  • Keyword-based opportunity recommendations
  • And more!
• Learn more by visiting 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)
Funding Institutional User Guide

June 2020