



ELSEVIER

# Funding Institutional User Guide

March 2021



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Note: User Guide coverage of *Funding Institutional Admins & Editors* begins on Slide 29



# 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 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

The screenshot shows the home page interface with several callout boxes:

- A:** Top navigation menu with links for Home, Search, My funding, and Editors. It also includes icons for a magnifying glass, a question mark, a building, and a profile icon.
- B:** A magnifying glass icon in the top right corner.
- C:** A search bar with the placeholder text "Search e.g. neuroscience" and a search button. Below the search bar are radio buttons for "Opportunities", "Awards", and "Funders".
- D:** A "Suggestions" section with the text "Connect your Scopus profile and view funding suggestions based on your publications." and a "View suggestions" link. It also includes "Analyze awards data" and "Tracked opportunities" sections with their respective descriptions and links.
- E:** A world map showing the geographical distribution of funders.
- F:** A table titled "Funders in The United States" with a "View all funders" link. The table lists two funders: "U.S. Department of Health and Human Services" with 1921 active opportunities and "National Institutes of Health" with 1489 active opportunities.

Funder	Active Opportunities	Action
U.S. Department of Health and Human Services	1921 active opportunities	<a href="#">View funder</a>
National Institutes of Health	1489 active opportunities	<a href="#">View funder</a>

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.

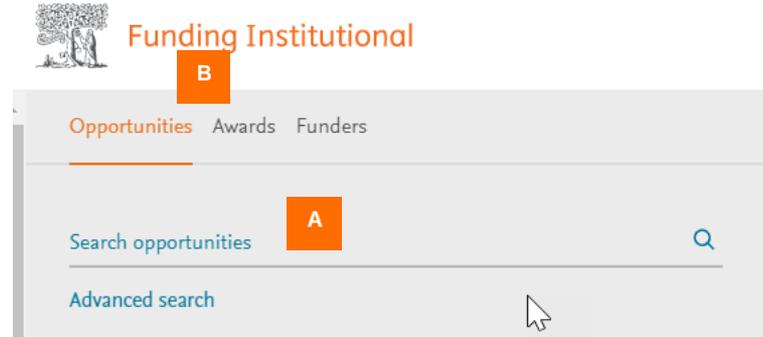
F. The **top 5 funders**, based on the number of opportunities on the country of the institution with which the user's login is affiliated.



# Search overview: Basic



Search "covid-19"  Opportunities  Awards  Funders



Funding Institutional

Opportunities  Awards  Funders

Search opportunities

[Advanced search](#)

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**.



# Search overview: Advanced

## Advanced search

### Find Funding opportunities using...

All of these words	A	These are important words, and all of them must be contained in the search results
E.g., Brain Medical "Data Science"		
Any of these words	B	At least one of these words should be included in the search results
None of these words	C	Search results with these words will not appear
Prioritized words	D	Search results with these words will be prioritized and appear at top of the results list

Use double quotes to search phrases, such as "geriatric neurology".

Cancel Search >

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

Limited submission	▼
Recurring opportunities	▼
Internal opportunities	▼
Research discipline	▼
Funding type	▼
Funder	▼
Funder country	▼
Funder type	▼
Applicant citizenship	▼
Applicant country affiliation	▼
Applicant type	▼
Activity country	▼
Application deadline	▼
Amount	▼

A

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

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.

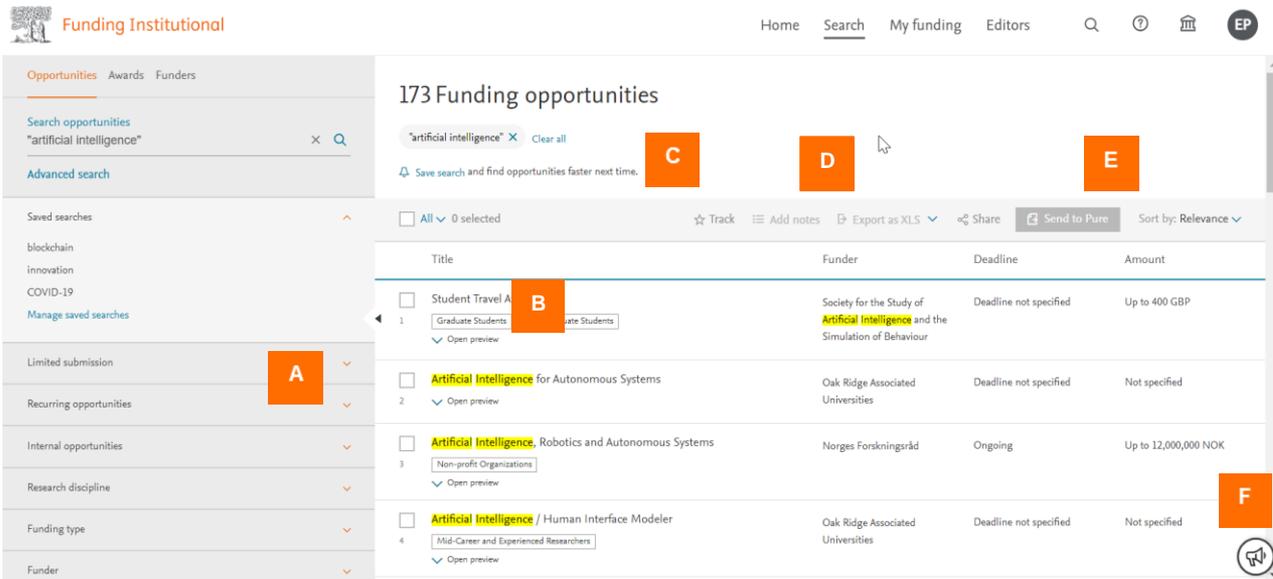
For example, heart attack finds results listing heart attack and heart attacks.

- 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



Funding Institutional

Home Search My funding Editors

Opportunities Awards Funders

Search opportunities  
"artificial intelligence" X Q

Advanced search

Saved searches  
blockchain  
innovation  
COVID-19  
Manage saved searches

Limited submission A

Recurring opportunities

Internal opportunities

Research discipline

Funding type

Funder

173 Funding opportunities

"artificial intelligence" X Clear all

Save search and find opportunities faster next time. C

D

E

All 0 selected ☆ Track Add notes Export as XLS Share Send to Pure Sort by: Relevance

	Title	Funder	Deadline	Amount
1	Student Travel A B Graduate Students Graduate Students Open preview	Society for the Study of Artificial Intelligence and the Simulation of Behaviour	Deadline not specified	Up to 400 GBP
2	Artificial Intelligence for Autonomous Systems Open preview	Oak Ridge Associated Universities	Deadline not specified	Not specified
3	Artificial Intelligence, Robotics and Autonomous Systems Non-profit Organizations Open preview	Norges Forskningsråd	Ongoing	Up to 12,000,000 NOK
4	Artificial Intelligence / Human Interface Modeler Mid-Career and Experienced Researchers Open preview	Oak Ridge Associated Universities	Deadline not specified	Not specified

F

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.

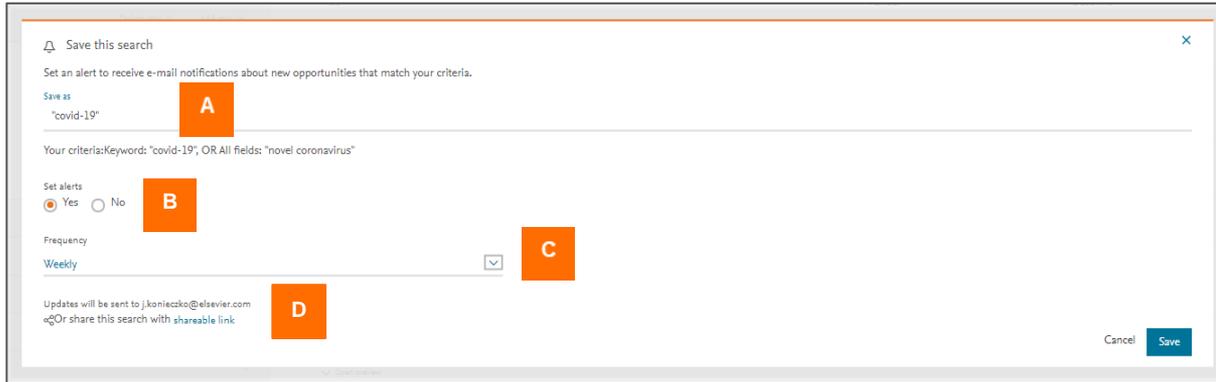
D. Add **Notes** to opportunities (and funder profiles) which can be viewed by others within your institution. Selected opportunities can be *exported via CSV into an XLS spreadsheet* for review and analysis or shared via email or using a static link.

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



The screenshot shows a 'Save this search' dialog box with the following elements:

- A:** The 'Save as' field containing the text '"covid-19"'. An orange box labeled 'A' is positioned to the right of the text.
- B:** The 'Set alerts' section with radio buttons for 'Yes' (selected) and 'No'. An orange box labeled 'B' is positioned to the right of the 'Yes' button.
- C:** The 'Frequency' dropdown menu set to 'Weekly'. An orange box labeled 'C' is positioned to the right of the dropdown.
- D:** The email address 'Updates will be sent to j.konieczko@elsevier.com'. An orange box labeled 'D' is positioned to the right of the email address.

At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

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



Funding Institutional

Home Search My funding Editors



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

ID: 501300256839 • Research and publications • Last updated: 8 Mar 2021

☆ Track Share Send to Pure Add opportunity notes Add funder notes

Opportunity details

Overview

Description

Eligibility

Contact

Deadlines

Announcement

Participating funders	<a href="#">Philippine Council for Industry, Energy, and Emerging Technology Research and Development</a>
Amount	Not specified
Applicant type	Commercial Organizations, Non-profit Organizations, Local or State Governments, Academic Institutions
Subject areas	Social Sciences / Education;
Original source	<a href="#">View on announcement page &gt;</a>

In about 12 weeks

Application

03-JUN-2021

[View all deadlines](#)

Description

The Department of Science and Technology (DOST) and the DOST-Philippine Council for Industry, Energy and Emerging Technology Research and Development (DOST-PCIEERD) are ready to accept research and development (R&D)/Science and Technology (S&T) proposals for 2023. This Call for Proposals is for specific priority areas identified in the Harmonized National R&D Agenda (HNRDA) 2017-2022. Guided by the principle "Science for the People", the DOST-PCIEERD directs R&D and S&T initiatives that will improve the innovation system to leverage economic progress through the formulation of sectoral

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 *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.



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Classification: Restricted

# Adding notes

## Add opportunity notes A ×

These notes will be visible only to users of your institution's account.  
You can manage all the notes in Editors > [Notes](#)

**Notes**  
[Notes title](#)  
Opportunity notes B

Type your message, application instruction and contact details...

**Additional file**  
Supported formats: pdf, doc, docx, .ppt, .pptx, xls, csv, png, jpeg, gif. (Up to 10MB each)  
[Choose file](#) C

**Internal deadline**  
[+ Add deadline](#)

[Cancel](#) [Add notes >](#)

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, xls, csv, png, jpeg and gif formats.



# Tracking opportunities

## Track opportunity A ×

Track your selected opportunity to easily follow it and to set email notifications for updates and deadline alerts. You can view your tracked opportunities and edit their groups and notifications in [My Funding > Tracked opportunities](#).

**Assign to group**

All Not grouped COVID-19 Sustainability

Create new group B

**Email notification ⓘ**

Send me opportunity updates by email C

**Set deadline alerts ⓘ**

Select alert time D

None ⌵ Remove

+ Add deadline

Cancel Track opportunity

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.

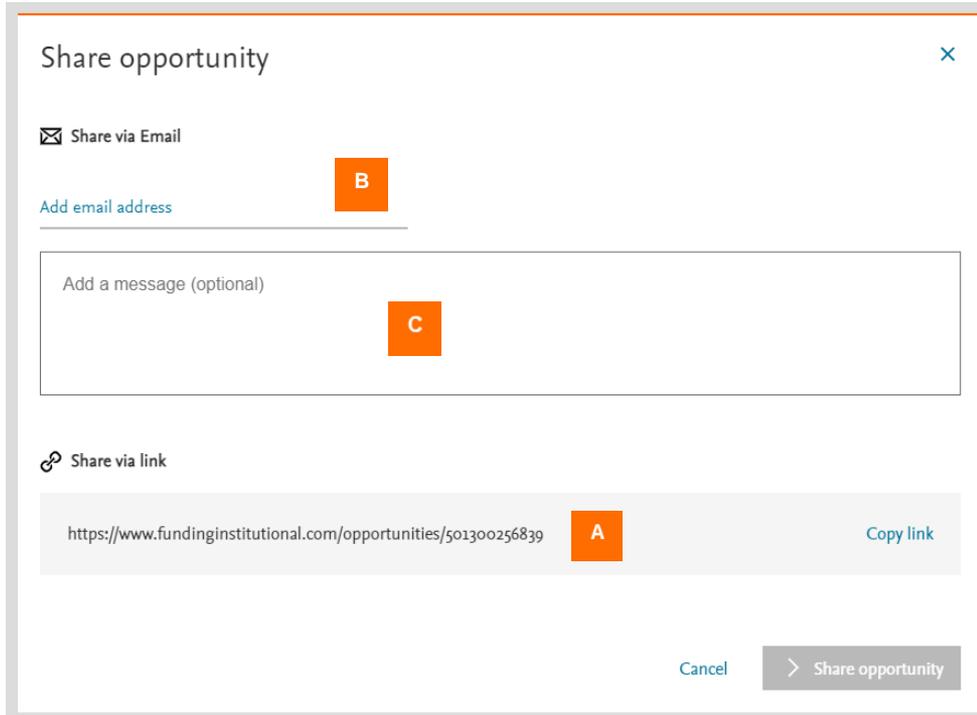
B. Tracked opportunities can be organized into groups, like folders, for easy access and organization.

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



The screenshot shows a 'Share opportunity' dialog box with the following elements:

- Share via Email:** A section with a checked email icon and the text 'Share via Email'. Below it is a text input field with the placeholder 'Add email address' and a blue 'Add email address' link. An orange callout box labeled 'B' is positioned above the input field.
- Add a message (optional):** A larger text input field with the placeholder 'Add a message (optional)'. An orange callout box labeled 'C' is positioned to the right of the input field.
- Share via link:** A section with a link icon and the text 'Share via link'. Below it is a grey bar containing the URL 'https://www.fundinginstitutional.com/opportunities/501300256839' and a blue 'Copy link' button. An orange callout box labeled 'A' is positioned above the URL.
- Buttons:** At the bottom right, there are two buttons: a 'Cancel' button and a 'Share opportunity' button with a right-pointing arrow.

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

Funding Institutional

Home Search My funding Editors

21,987 Funding opportunities

All 1 selected

Track Add notes Export as XLS Share Send to Pure Sort by: Relevance

Title	Funder	Deadline	Amount
DOST AND PCIEERD GRANTS-IN-AID (GIA) PROGRAM CALL FOR PROPOSALS FOR CY2023 FUNDING	Philippine Council for Industry, Energy, and Emerging Technology Research and Development	In 87 days <a href="#">All deadlines</a>	Not specified

Commercial Organizations Non-profit Organizations Local or State Governments Academic Institutions

Open preview

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

## Track opportunity

Opportunities sent to Pure will be updated automatically.  
You can manage these opportunities later in [My funding](#) > [Sent to Pure](#)

**Add labels to opportunities in Pure.**

Labels can help organize your funding opportunities in Pure.

artificial intelligence COVID-19 data science math

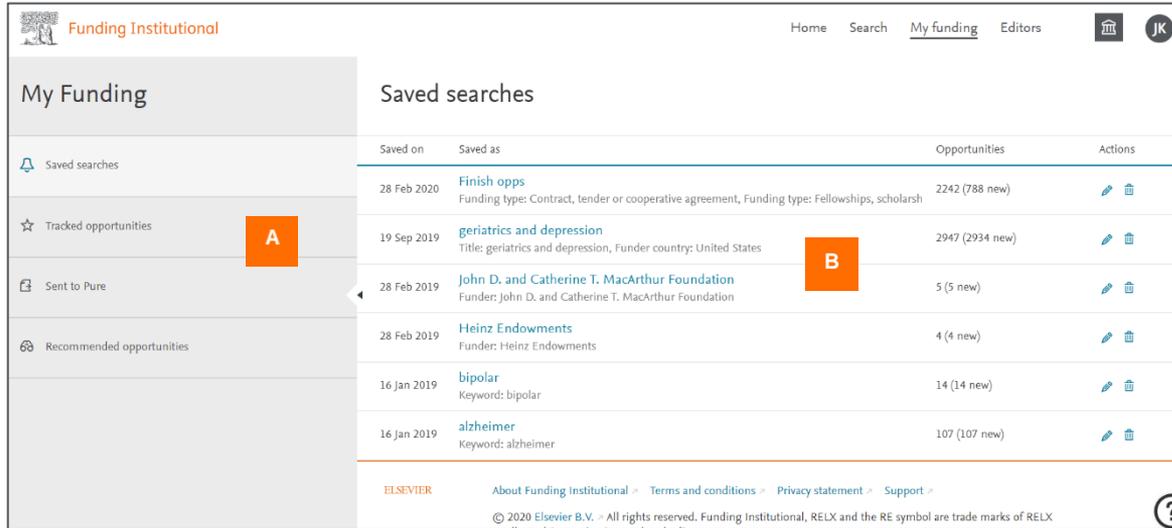
Create new label

Cancel All set, send >

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



The screenshot shows the 'My Funding' module interface. On the left is a navigation menu with options: 'Saved searches', 'Tracked opportunities', 'Sent to Pure', and 'Recommended opportunities'. The main area is titled 'Saved searches' and contains a table with the following data:

Saved on	Saved as	Opportunities	Actions
28 Feb 2020	<a href="#">Finish opps</a> Funding type: Contract, tender or cooperative agreement, Funding type: Fellowships, scholarsh	2242 (788 new)	
19 Sep 2019	<a href="#">geriatrics and depression</a> Title: geriatrics and depression, Funder country: United States	2947 (2934 new)	
28 Feb 2019	<a href="#">John D. and Catherine T. MacArthur Foundation</a> Funder: John D. and Catherine T. MacArthur Foundation	5 (5 new)	
28 Feb 2019	<a href="#">Heinz Endowments</a> Funder: Heinz Endowments	4 (4 new)	
16 Jan 2019	<a href="#">bipolar</a> Keyword: bipolar	14 (14 new)	
16 Jan 2019	<a href="#">alzheimer</a> Keyword: alzheimer	107 (107 new)	

At the bottom of the page, there is a footer with the Elsevier logo and text: 'About Funding Institutional > Terms and conditions > Privacy statement > Support > © 2020 Elsevier B.V. All rights reserved. Funding Institutional, RELX and the RE symbol are trade marks of RELX'.

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

The screenshot shows the 'My Funding' page with a sidebar on the left and a main content area. The sidebar includes 'Saved searches', 'Tracked opportunities', 'Sent to Pure', and 'Recommended opportunities'. The main content area is titled 'Tracked opportunities' and contains a table with columns for 'Groups', 'Opportunities', and 'Actions'. The table lists five groups: 'All' (14 opportunities), 'Public Health' (5 opportunities), 'Arthritis' (1 opportunity), 'COVID-19' (2 opportunities), and 'ALZ Group' (6 opportunities). An orange square with the letter 'A' is positioned over the 'All' group, and another orange square with the letter 'B' is positioned over the 'ALZ Group' row. At the bottom of the page, there is a footer with the Elsevier logo and copyright information.

Groups	Opportunities	Actions
All	14	
Public Health	5	
Arthritis	1	
COVID-19	2	
ALZ Group	6	

A. Tracked opportunities are displayed by folder.

B. Tracked opportunities can be untracked and the folder can be deleted.



# My Funding – Sent to Pure

Labels	Opportunities	Actions
Artificial Intelligence	3	
COVID-19	3	
Day, Andrew	3	

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

**My Funding**

Recommended opportunities

View up-to-date recommended funding opportunities based on researcher's current Scopus profiles.

Search

Researched

Actions

Boltz, Marie P.  
Biochemistry, Genetics And Molecular Biology, Medicine, Neuroscience, Nursing, Psychology, Social Sciences, Health Professions

Day, Andrew T.  
Biochemistry, Genetics And Molecular Biology, Medicine, Nursing, Dentistry

Franzini, Petra  
General, Agricultural And Biological Sciences, Arts And Humanities, Biochemistry, Genetics And Molecular Biology, Chemical Engineering, Chemistry, Computer Science, Decision Sciences, Engineering, Immunology And Microbiology, ...

Higashi, Robert A.  
General, Agricultural And Biological Sciences, Arts And Humanities, Biochemistry, Genetics And Molecular Biology, Chemistry, Computer Science, Decision Sciences, Engineering, Environmental Science, Immunology And Microbiology, ...

Konieczko, Erika M.  
Arts And Humanities, Biochemistry, Genetics And Molecular Biology, Engineering, Immunology And Microbiology, Mathematics, Medicine, Neuroscience

Kingsstad, Daniel V.  
General, Biochemistry, Genetics And Molecular Biology, Chemical Engineering, Chemistry, Engineering, Materials Science, Pharmacology, Technology And Pharmaceutical, Physics And Astronomy

MacDonald, Elizabeth A.  
General, Computer Science, Decision Sciences, Earth And Planetary Sciences, Energy Engineering, Environmental Science, Mathematics, Physics And Astronomy

Maglio-Trilidis, Percy  
General, Agricultural And Biological Sciences, Arts And Humanities, Biochemistry, Genetics And Molecular Biology, Business, Management And Accounting, Chemical Engineering, Engineering, Immunology And Microbiology, Health, ...

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RELI ?

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>



# 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.

The image shows a two-step process for adding a new researcher. The first step is a form titled 'Add new researcher' with a search bar and a magnifying glass icon. An orange box labeled 'A' highlights the 'Add new researcher' link. An orange arrow points from this link to the second step. The second step is a form titled 'Add new researcher' with a close button (X) in the top right. It contains the following fields and options:

- Name:** Author's last name (Becker) and Author's first name (J). An orange box labeled 'B' highlights the first name field.
- Affiliation (optional):** University of Pittsburgh Medical Center.
- Scopus author ID:** Author ID number. An orange box labeled 'C' highlights this field.
- ORCID:** ORCID identifier.

At the bottom of the form are 'Cancel' and 'Next' buttons. An orange arrow points from the 'Next' button to a search results window. The search results window is titled 'Add new researcher' and contains the following text:

Connect a researcher's Scopus profile to get up-to-date recommended opportunities. Relevant funding opportunities will be recommended based on the researcher's current profile and past co-authored publications. Search by: Name Becker, J

<input checked="" type="radio"/>	1	Becker, James T. University of Pittsburgh School of Medicine, 384 publications	View recent publications
<input type="radio"/>	2	Becker, Dorothy J. University of Pittsburgh, 325 publications	View recent publications
<input type="radio"/>	3	Becker, Lance B. North Shore University Hospital, 238 publications	View recent publications
<input type="radio"/>	4	Becker, Judith V. The University of Arizona, 95 publications	View recent publications
<input type="radio"/>	5	Becker, Joseph University of Washington, 37 publications	View recent publications
<input type="radio"/>	6	Becker, Daniel J.	View recent publications

At the bottom of the search results window are '< Back', 'Cancel', and 'Add researcher' buttons. An orange box labeled 'D' highlights the radio button for the first result.



# Recommended opportunities – Reviewing results

The screenshot shows the 'My Funding' page for a researcher named Becker, James T. The page displays a list of 20 recommended opportunities. A table with columns for Title, Funder, Deadline, Amount, and Remove is visible. A 'Recommendation feedback' modal is open, allowing the user to provide feedback on a removed opportunity. The modal includes a dropdown for 'Research discipline' and a 'Send' button.

Title	Funder	Deadline	Amount	Remove
Glenn Foundation for Medical Research and AFAR Grants for Junior Faculty	American Federation for Aging Research	11/30/2024 or earlier	up to 100,000 USD	X
Emotion Regulation, Aging and Mental Disorder (R1 Clinical Trial Not Allowed)	National Institutes of Health	11/30/2024 or earlier	Not specified	X
Emotion Regulation, Aging and Mental Disorder (R1 Clinical Trial Not Allowed)	National Institutes of Health	11/30/2024 or earlier		X
NINDS Central Repository Non-renewable Sample Access (R1 Clinical Trial Not Allowed)	National Institutes of Health	Letter of intent on May 28th 2022 or earlier		X
EBMRI Initiative Research Opportunities Using Innovative Non-invasive Neuroimaging and Stimulating Technologies in the Human Brain (R1 Clinical Trial Required)	National Institutes of Health	Letter of intent on September 19th 2022 or earlier		X

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



Opportunities **Awards** Funders

**B**

Search awards 

[Advanced search](#)

Research discipline 

Recipient country 

7,196,044 Awards [Analyze search results](#)

All  0 selected

[Export as XLS](#)  Sort by: [Relevance](#) 

	Title	Funder	Awardee	Year	Amount
1	<input type="checkbox"/> Come As You Are - Assessing the Efficacy of a Nurse Case Management HIV Prevention and Care Intervention among Homeless Youth <a href="#">Open preview</a>	National Institute of Nursing Research	SANTA MARIA M. DIANE, UNIVERSITY OF TEXAS HLTH SCI CTR HOUSTON	2020	156,000 USD



# 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.

The screenshot displays the 'Funding Institutional' search interface. On the left, a sidebar lists various search filters: Opportunities, Awards, and Funders. Below these are fields for Search awards (marked with 'A'), Edit advanced search, Research discipline, Recipient country, Funding type, Funder (marked with 'C'), Funder country, Funder type, Award start year, and Amount. The main area shows an 'Advanced search' modal (marked with 'B') with the following sections:

- All of these words**: A text input field containing 'E.g., Brain Medical "Data Science"'. A tooltip explains: 'These are important words, and all of them must be contained in the search results'.
- Any of these words**: A text input field. A tooltip explains: 'At least one of these words should be included in the search results'.
- None of these words**: A text input field with a cursor. A tooltip explains: 'Search results with these words will not appear'.
- Prioritized words**: A text input field. A tooltip explains: 'Search results with these words will be prioritized and appear at top of the results list'.

A light blue banner at the bottom of the modal states: 'Use double quotes to search phrases, such as "geriatric neurology"'. At the bottom right of the modal are 'Cancel' and 'Search >' buttons.



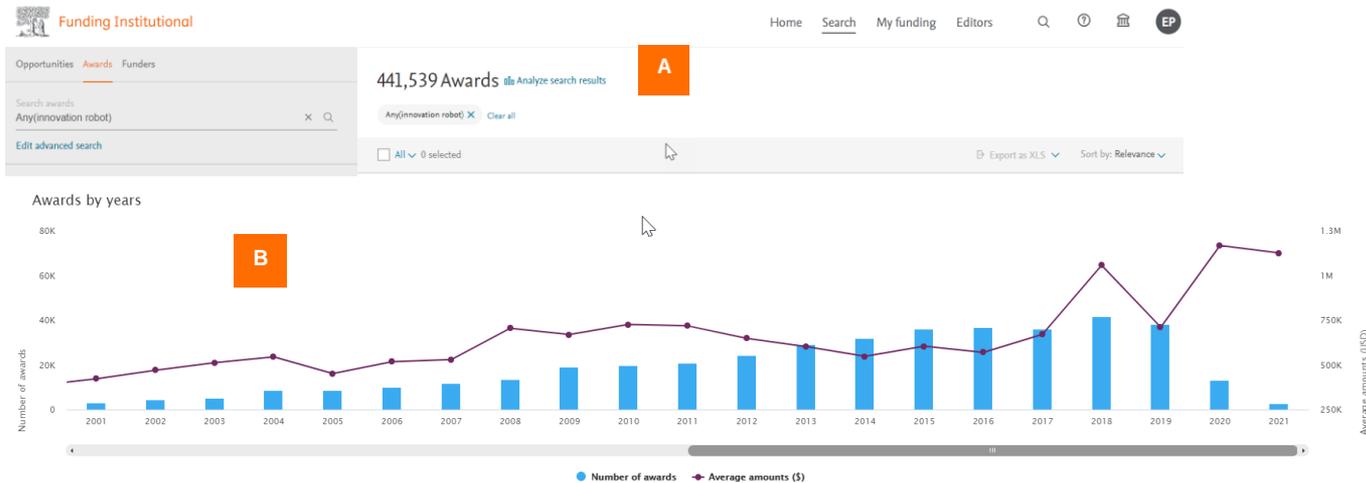
# Awards Search – Reviewing results

- 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*.
- Results of interest can be previewed using the Open preview link.
- 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*.
- Selected awards can be exported into XLS file formats.
- Use the Analyze search results to assess data by *Awards by years*, *Awards by research discipline* and *Awards by funder types* among other visualizations.

The screenshot displays the 'Funding Institutional' Awards Search interface. On the left, a sidebar contains filters for 'Opportunities', 'Awards', and 'Funders'. The 'Search awards' field contains 'Any(innovation)'. Below this are dropdown menus for 'Research discipline', 'Recipient country', 'Funding type', 'Funder', 'Funder country', 'Funder type', 'Award start year', and 'Amount'. A search button with a magnifying glass icon is present. The main content area shows '412,197 Awards' and an 'Analyze search results' link. Below this is a search bar with 'Any(innovation)' and a 'Clear all' button. A table lists search results with columns for 'Title', 'Funder', 'Awardee', 'Year', and 'Amount'. The first result is 'INNOVSUPPWALES. Action "Establishing services enhancing the innovation management capacity of SMEs in the Enterprise Europe Network"', funded by 'Horizon 2020 Framework Programme' to 'BIC INNOVATION LTD' in 2014 for 13,248 EUR. The second result is 'January 2013', funded by 'innovate UK' to 'Nova Innovation Ltd' in 2013 for 5,000 GBP. Below the table, a detailed view of the first award is shown, including 'Grant ID: 643379', 'Research Grants', 'Start date: 1 Jul 2014', and 'End date: 31 Dec 2014'. The 'Funder' is 'Horizon 2020 Framework Programme'. The 'Amount (est)' is '13,248 EUR'. The 'Receiving institution' includes 'Bic Innovation Ltd' and 'Swansea University'. The 'Research Area' is 'Business, Management and Accounting' and 'Management of Technology and Innovation'. A 'Description' section at the bottom explains the award's purpose: 'In order to address the challenges of increasing SMEs innovation potential and enabling them to bring their innovative ideas to the market, new programmes and support systems have been designed. Europe recognises the importance of innovation and SMEs as growth drivers and as such, this action shall provide specialized consulting services addressing the innovation management capacity of SMEs which possess significant innovation activities. Beneficiaries of the SME'.

# 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.



Search filters: Any(innovation robot) X Year: 2013 X Clear all

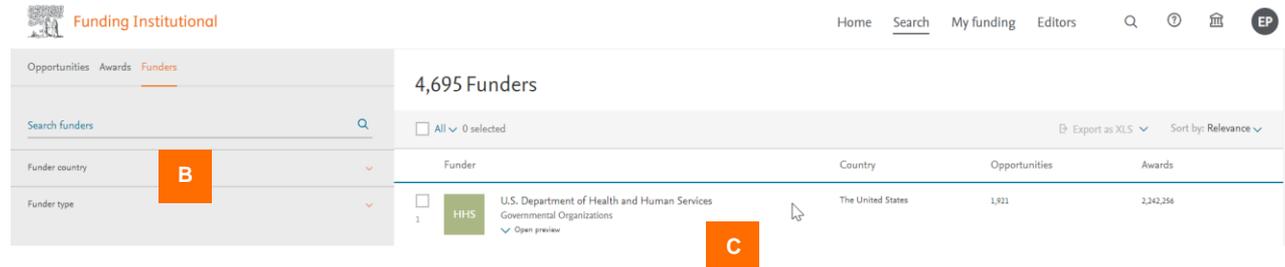
29,309 Awards Analyze search results

Title	Funder	Awardee	Year	Amount
1 ECHORD Plus Plus, European Clearing House for Open Robotics Development Plus Plus	Seventh Framework Programme	TECHNISCHE UNIVERSITAET MUENCHEN	2013	19,750,000 EUR



# 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 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.

The screenshot displays the 'Funding Institutional' website interface for the 'Cure Alzheimer's Fund'. The main content area features a purple funder card with the acronym 'CAF' and statistics: 'United States • 1 opportunities • 199 awards'. Below this is an 'About' section with a 'Read more' link. Two data visualizations are present: a horizontal bar chart showing 'Current opportunities by top research discipline' with 'Medicine(100%)' and 'Neuroscience(100%)', and a circular chart for 'Current opportunities by funding type' with a single category 'Research and publications'. A right-hand sidebar, highlighted with a blue border, contains a search bar and two sections: 'Recent opportunities from Cure Alzheimer's Fund' and 'Awards from Cure Alzheimer's Fund', each listing specific grants with their start dates and amounts.

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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





# Opportunity Notes

## Add opportunity notes ✕

These notes will be visible only to users of your institution's account.  
You can manage all the notes in Editors > [Notes](#)

**Notes**  
[Notes title](#)  
Opportunity notes

---

Type your message, application instruction and contact details...

**Additional file**  
Supported formats: pdf, doc, docx, .ppt, .pptx, xls, csv, png, jpeg, gif. (Up to 10MB each)  
[Choose file](#)

**Internal deadline**  
[+ Add deadline](#)

[Cancel](#) [Add notes >](#)

**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.



# Funder Notes

## Add funder notes ×

Funder notes will appear in the funder's page, as well as in the page of every opportunity by .  
The notes will be visible only to users of your institution's account.  
You can manage all the notes in Editors > [Notes](#)

**Notes**

Type your message, application instruction and contact details...

**Additional file**  
Supported formats: pdf, doc, docx, .ppt, .pptx, xls, csv, png, jpeg, gif. (Up to 10MB each)

[Choose file](#)

[Cancel](#) [Add 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 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

**Internal opportunities**

Create your contribution to your internal opportunities.  
These opportunities are visible only to users of your institution's website.

5 internal opportunities

All (or 2 selected)

Title	Last updated by	Last updated on	Status	Actions
<input type="checkbox"/> Influenza Vaccination Coverage of Population and the Factors Influencing Influenza Vaccination in Mainland China: A Meta-analysis	Capital Research	22 Apr 2020	Unpublished draft	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> Semi-Terms Briefcase	Marie Kuo	13 Apr 2020	Unpublished draft	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> London Arts and Humanities Partnership (LAHP)	Nick Graham	1 Apr 2020	Published & active	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> The Chadwick Trust - Travelling fellowships and scholarships	Elaine Palmero	11 Dec 2019	Published & active	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/> NOVEL AND SAFE TREATMENT FOR TYPE 2 DIABETES	Jennifer Old Ebbels	8 Jul 2019	Unpublished draft	<input type="checkbox"/> <input type="checkbox"/>

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

## Create an internal opportunity

Create a funding opportunity that will only be available to the users at your institution. You can save a draft at any stage, however all the mandatory details have to be filled out in order to publish the opportunity.

### \* Required fields

### General information

\* Title of opportunity

ID

\* Opportunity type

Announcement page (Enter full URL, e.g. <http://www.website.com>)

\* Opportunity description

B I U | | |

### Research disciplines

\* Research discipline

X Remove discipline + Add discipline

### Deadlines

\*  Choose date  Ongoing

Type of deadline  
\* Application

Deadline description

B I U | | |

X Remove deadline + Add deadline

### Amount

Amount \* Currency

Amount description

B I U | | |

### Eligibility

Applicant eligibility  Career level

Applicant eligibility description

B I U | | |

### Contact details

\* First name

Last name

Title

\* Email

Phone

X Remove contact + Add another contact

### How to apply

B I U | | |

### Add file

Add a file to your internal opportunity that will be available for download by others at your institution.

[Choose file](#) (pdf, doc, docx, .ppt, .pptx, xls, csv, png, jpeg, gif. Up to 10MB each)

Cancel

Save as draft

Publish & make active

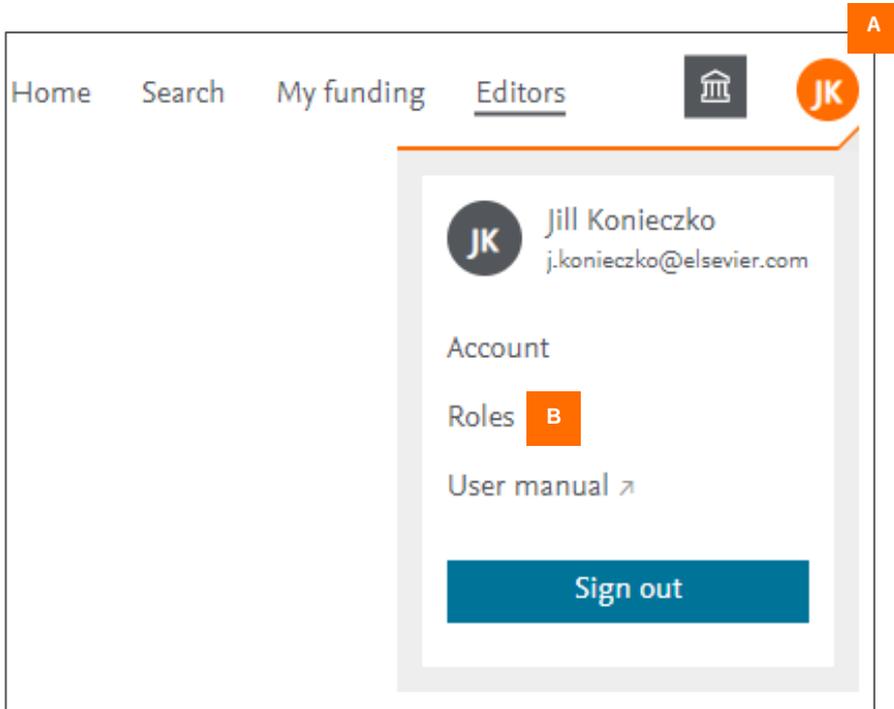
When creating internal opportunities, providing more detail helps to make the record more easily retrieved in search and gives the necessary information to prospective applicants.

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.





# 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



# Funder Data Requests

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



[fundingoperations@elsevier.com](mailto:fundingoperations@elsevier.com)

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





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# Funding Institutional User Guide

March 2021

