



ELSEVIER

Funding Institutional User Guide

March 2021



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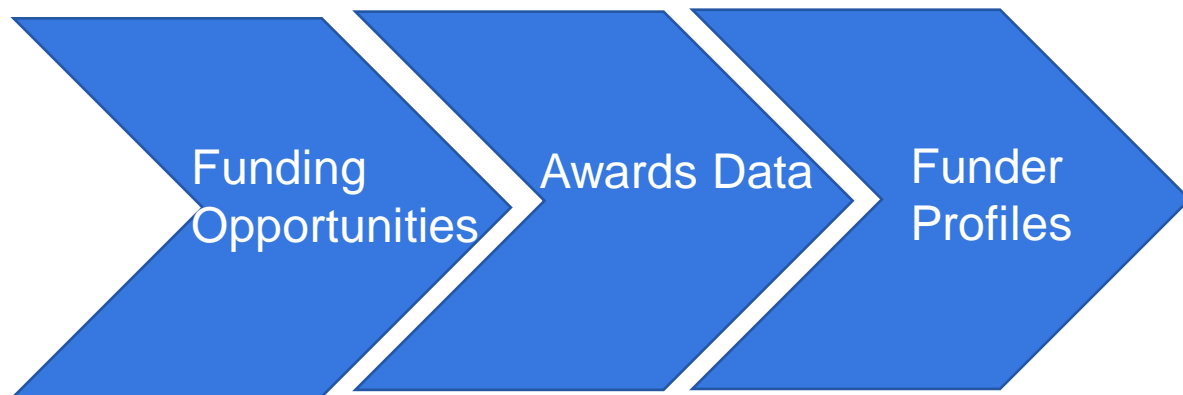
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Note: User Guide coverage of *Funding Institutional Admins & Editors* begins on Slide 29



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.

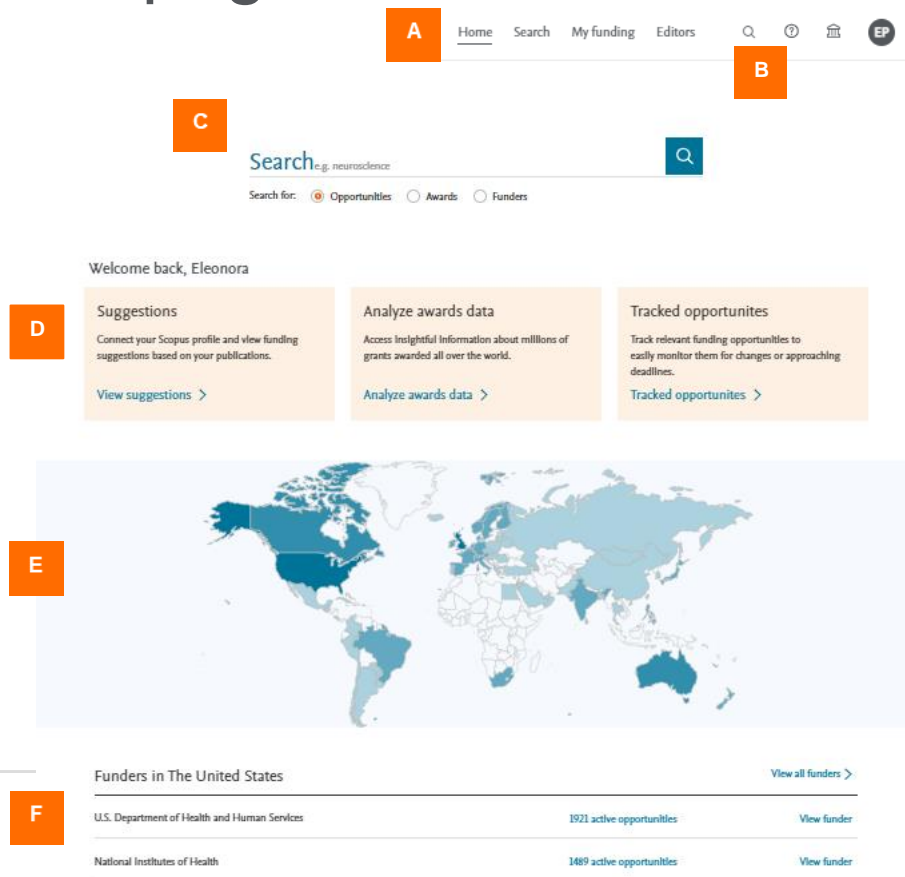
B. Providing insights into prior grant rounds, the **awards data** goes back to 1954, and, as of March 2021, exceeds 7.1 million awards. As available from the funder, awards data includes the grant title, grant ID, award amount, start and end dates, PI name and grant description.

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



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" **A**

Search for: ☒ Opportunities ☐ Awards ☐ Funders **B**

 **Funding Institutional**

B

Opportunities Awards Funders

Search opportunities **A**

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

E.g., Brain Medical "Data Science"

These are important words, and all of them must be contained in the search results

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

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

	Title	Funder	Deadline	Amount
1	Student Travel A B 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

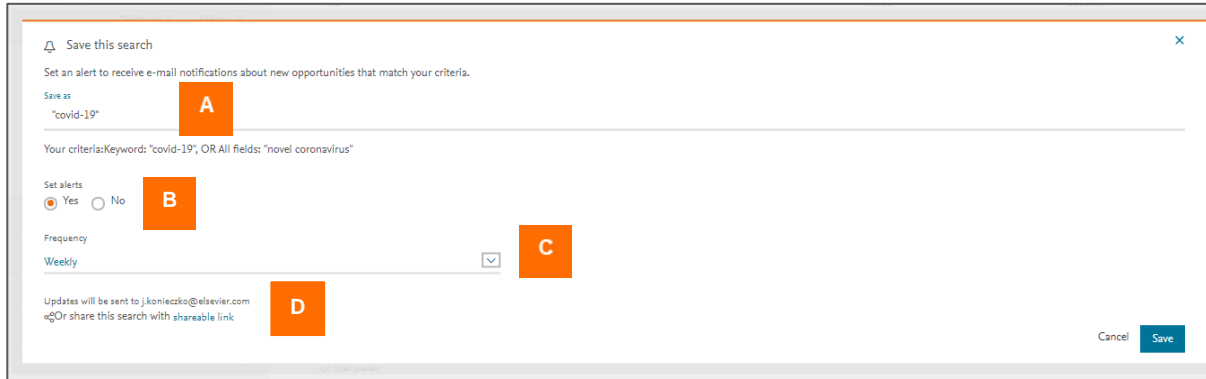
A. Enter a name to save a search as an automatic alert; you will receive an email notification whenever new opportunities matching your search criteria are added to the opportunities database.

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.



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

- Save as:** A text input field containing '"covid-19"' with an orange box labeled 'A' next to it.
- Your criteria:** A text area containing 'Keyword: "covid-19"; OR All fields: "novel coronavirus"'.
- Set alerts:** Two radio buttons, 'Yes' (selected) and 'No', with an orange box labeled 'B' next to the 'Yes' button.
- Frequency:** A dropdown menu showing 'Weekly' with an orange box labeled 'C' next to it.
- Updates will be sent to:** A text field containing 'j.konieczko@elsevier.com' with an orange box labeled 'D' next to it.
- Shareable link:** A link labeled 'Or share this search with shareable link'.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.



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

E

F

Overview

Description

Eligibility

Contact

Deadlines

Announcement ↗

D

C

Participating funders Philippine Council for Industry, Energy, and Emerging Technology Research and Development

Amount Not specified

Applicant type Commercial Organizations, Non-profit Organizations, Local or State Governments, Academic Institutions

Subject areas Social Sciences / Education;

Original source [View on announcement page >](#)

A



In about 12 weeks

Application

03-Jun-2021

[View all deadlines](#)

B

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.



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

None

D

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

Share opportunity

Share via Email

Add email address

Add a message (optional)

Share via link

https://www.fundinginstitutional.com/opportunities/501300256839

Copy link

Cancel

> Share opportunity

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.

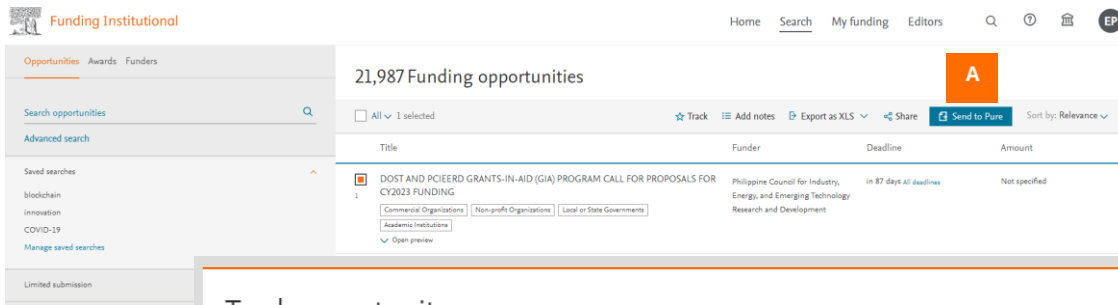
B. *(Optional)* Add notes that can be viewed by the colleagues with whom you shared the opportunity.

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.

The Elsevier logo, featuring a tree and a figure, with the word "ELSEVIER" below it.

Classification: Restricted

Send to Pure



Funding Institutional

Home Search My funding Editors

21,987 Funding opportunities

Search opportunities

Advanced search

Saved searches

blockchain

innovation

COVID-19

Manage saved searches

Limited submission

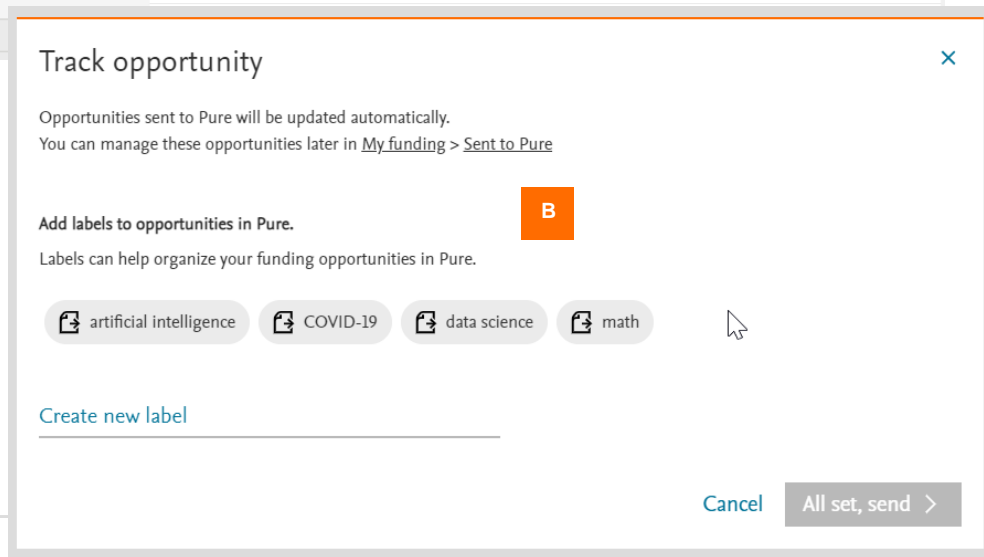
Track Add notes Export as XLS Share Send to Pure Sort by: Relevance

Title	Funder	Deadline	Amount
1 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 All deadlines	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

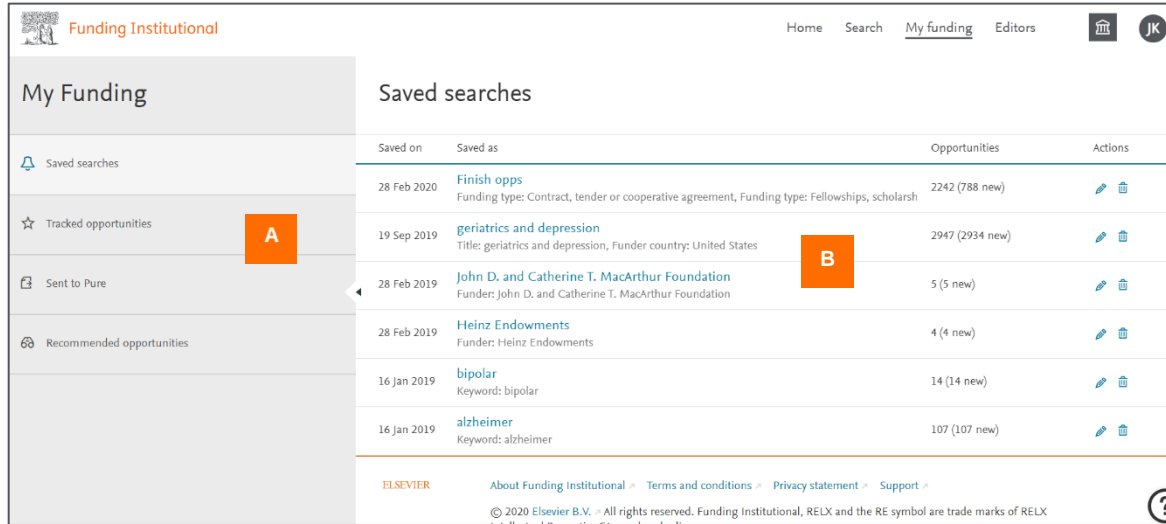
Create new label

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 displays the 'My Funding' section of the 'Funding Institutional' portal. The left sidebar contains navigation links: 'Saved searches' (highlighted with an orange square 'A'), 'Tracked opportunities', 'Sent to Pure', and 'Recommended opportunities'. The main content area, titled 'Saved searches', contains a table with the following data:

Saved on	Saved as	Opportunities	Actions
28 Feb 2020	Finish opps Funding type: Contract, tender or cooperative agreement, Funding type: Fellowships, scholarsh	2242 (788 new)	
19 Sep 2019	geriatrics and depression Title: geriatrics and depression, Funder country: United States	2947 (2934 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	Heinz Endowments Funder: Heinz Endowments	4 (4 new)	
16 Jan 2019	bipolar Keyword: bipolar	14 (14 new)	
16 Jan 2019	alzheimer Keyword: alzheimer	107 (107 new)	

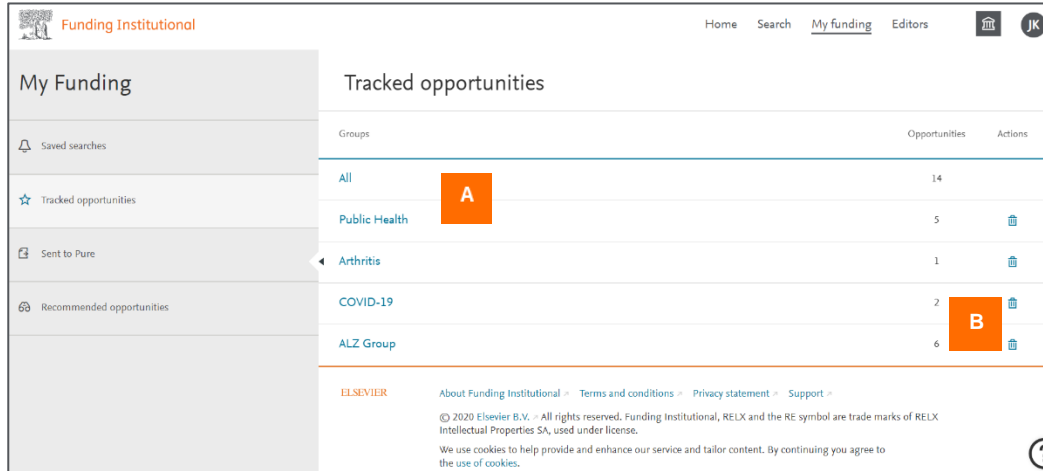
At the bottom of the page, there is a footer with the Elsevier logo, navigation links ('About Funding Institutional', 'Terms and conditions', 'Privacy statement', 'Support'), and a copyright notice: '© 2020 Elsevier B.V. All rights reserved. Funding Institutional, RELX and the RE symbol are trade marks 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 on the Elsevier Funding Institutional portal. The left sidebar contains navigation options: 'Saved searches', 'Tracked opportunities' (selected), 'Sent to Pure', and 'Recommended opportunities'. The main content area is titled 'Tracked opportunities' and displays a table with columns for 'Groups', 'Opportunities', and 'Actions'.

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

Below the table, there is a footer section with the Elsevier logo, navigation links (About Funding Institutional, Terms and conditions, Privacy statement, Support), copyright information (© 2020 Elsevier B.V.), and a cookie consent notice.

A. Tracked opportunities are displayed by folder.

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



My Funding – Sent to Pure

Funding Institutional		Home	Search	My funding	Editors		JK
My Funding		Sent to Pure					
Saved searches		Labels		Opportunities	Actions		
Tracked opportunities		Artificial Intelligence		3	A		
Sent to Pure		COVID-19		3			
Recommended opportunities		Day, Andrew		3	B		

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 profile.

Researchers


Researcher	Actions
Soltz, Marie P. Biochemistry, Genetics And Molecular Biology, Medicine, Neuroscience, Nursing, Psychology, Social Sciences, Health Professions	View profile in Scopus Remove
Day, Andrew T. Biochemistry, Genetics And Molecular Biology, Medicine, Nursing, Dentistry	View profile in Scopus Remove
Fromme, 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, ...	View profile in Scopus Remove
Hogels, Robert A. General, Agricultural And Biological Sciences, Arts And Humanities, Biochemistry, Genetics And Molecular Biology, Chemistry, Computer Science, Decision Sciences, Engineering, Environmental Sciences, Immunology And Microbiology, ...	View profile in Scopus Remove
Konietzko, Elita M. Arts And Humanities, Biochemistry, Genetics And Molecular Biology, Engineering, Immunology And Microbiology, Mathematics, Medicine, Neuroscience	View profile in Scopus Remove
Kingstad, Daniel V. General, Biochemistry, Genetics And Molecular Biology, Chemical Engineering, Chemistry, Engineering, Materials Science, Pharmacology, Technology And Pharmaceutical Sciences, Physics And Astronomy	View profile in Scopus Remove
MacDonald, Elizabeth A. General, Computer Science, Decision Sciences, Earth And Planetary Sciences, Energy Engineering, Environmental Sciences, Mathematics, Physics And Astronomy	View profile in Scopus Remove
Maya-Trisán, Percy General, Agricultural And Biological Sciences, Arts And Humanities, Biochemistry, Genetics And Molecular Biology, Business, Management And Accounting, Chemical Engineering, Engineering, Immunology And Microbiology, Medicine	View profile in Scopus Remove

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We use cookies to help provide and enhance our services and tailor content. By continuing you agree to the use of cookies.

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.

Add new researcher

Search

Add new researcher

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 Scopus profile by:

☒ **Name**
Author's last name
* Becker
Author's first name
J
Affiliation (optional)
University of Pittsburgh Medical Center

☐ **Scopus author ID**
Author ID number

☐ **ORCID**
ORCID identifier

Cancel Next

Add new researcher

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

- ☒ 1 **Becker, James T.**
University of Pittsburgh School of Medicine, 384 publications View recent publications
- ☐ 2 **Becker, Dorothy J.**
University of Pittsburgh, 325 publications View recent publications
- ☐ 3 **Becker, Lance B.**
North Shore University Hospital, 238 publications View recent publications
- ☐ 4 **Becker, Judith V.**
The University of Arizona, 95 publications View recent publications
- ☐ 5 **Becker, Joseph**
University of Washington, 37 publications View recent publications
- ☐ 6 **Becker, Daniel J.**
View recent publications

< Back Cancel Add researcher



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 'Title', 'Funder', 'Deadline', 'Amount', and 'Remove' is visible. The first row shows an opportunity from the 'American Federation for Aging Research' with a deadline of 'in 158 days' and an amount of '\$100,000 USD'. A 'Recommendation feedback' modal is open, showing a message: 'The opportunity was removed. Let us know why this opportunity doesn't suit this researcher so we can improve our future recommendations.' The modal includes a dropdown for 'Research discipline' and a text area for 'Additional feedback'. Buttons for 'Cancel' and 'Send' are at the bottom.

My Funding

Becker, James T.

General, Agricultural and Biological Sciences, Arts and Humanities, Biochemistry, Bioinformatics, Botany and Plant Sciences, Chemistry, Computer Science, Engineering, Environmental Science, Immunology and Microbiology, Medicine, Neuroscience, Nursing, Pharmacology, Technology and Pharmaceuticals, Physics and Astronomy, Psychology, Social Sciences, Health Professions View profile in Scopus

20 recommended opportunities

Page 4 of 4

Title	Funder	Deadline	Amount	Remove
1. Open Foundation for Medical Research and AFAR Grants for Junior Faculty View details Add note Report as inappropriate Send to Pure	American Federation for Aging Research	in 158 days	\$100,000 USD	X
2. Erection Regulation, Aging and Mental Disorder (R1 Clinical Trial Not Allowed) View details Add note Report as inappropriate Send to Pure	National Institutes of Health	in 158 days	not specified	X
3. Erection Regulation, Aging and Mental Disorder (R1 Clinical Trial Not Allowed) View details Add note Report as inappropriate Send to Pure	National Institutes of Health	in 158 days	not specified	X
4. Erection Regulation, Aging and Mental Disorder (R1 Clinical Trial Not Allowed) View details Add note Report as inappropriate Send to Pure	National Institutes of Health	in 158 days	not specified	X
5. Erection Regulation, Aging and Mental Disorder (R1 Clinical Trial Not Allowed) View details Add note Report as inappropriate Send to Pure	National Institutes of Health	in 158 days	not specified	X
6. Erection Regulation, Aging and Mental Disorder (R1 Clinical Trial Not Allowed) View details Add note Report as inappropriate Send to Pure	National Institutes of Health	in 158 days	not specified	X
7. Erection Regulation, Aging and Mental Disorder (R1 Clinical Trial Not Allowed) View details Add note Report as inappropriate Send to Pure	National Institutes of Health	in 158 days	not specified	X
8. Erection Regulation, Aging and Mental Disorder (R1 Clinical Trial Not Allowed) View details Add note Report as inappropriate Send to Pure	National Institutes of Health	in 158 days	not specified	X
9. Erection Regulation, Aging and Mental Disorder (R1 Clinical Trial Not Allowed) View details Add note Report as inappropriate Send to Pure	National Institutes of Health	in 158 days	not specified	X
10. Erection Regulation, Aging and Mental Disorder (R1 Clinical Trial Not Allowed) View details Add note Report as inappropriate Send to Pure	National Institutes of Health	in 158 days	not specified	X

Recommendation feedback

The opportunity was removed.
Let us know why this opportunity doesn't suit this researcher so we can improve our future recommendations.

Research discipline

Additional feedback

Cancel Send

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



Funding Institutional

[Home](#)

[Search](#)

[My funding](#)

[Editors](#)



- A. Awards data can be searched via the *Awards* radio button on the home screen, or...
- B. Using the *Awards* module in Search

Search

A



Search for: ☐ Opportunities ☒ Awards ☐ Funders



Funding Institutional

[Home](#)

[Search](#)

[My funding](#)

[Editors](#)



[Opportunities](#) [Awards](#) [Funders](#)

Search awards

B

[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 Open preview	National Institute of Nursing Research	SANTA MARIA M. DIANE, UNIVERSITY OF TEXAS HLTH SCI CTR HOUSTON	2020	156,000 USD



Classification: Restricted

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 contains filters: Opportunities, Awards (highlighted), and Funders. Below these are search fields: Search awards (labeled A), Edit advanced search, Research discipline, Recipient country, Funding type, Funder (labeled C), Funder country, Funder type, Award start year, and Amount. The main area shows the 'Advanced search' modal (labeled B) with the title 'Find awards using...'. It features four search criteria: 'All of these words' (with example 'E.g., Brain Medical "Data Science"'), 'Any of these words', 'None of these words' (with a cursor), and 'Prioritized words'. Each criterion has a corresponding explanation on the right. A light blue box 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' section shows the query 'Any(innovation)' with a search icon (A). Below this are expandable filter sections for Research discipline, Recipient country, Funding type, Funder, Funder country, Funder type, Award start year, and Amount. The main results area shows '412,197 Awards' (E) with an 'Analyze search results' link. 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 SME's in the Enterprise Europe Network"' (B) from 'Horizon 2020 Framework Programme' to 'BIC INNOVATION LTD' in 2014 for 13,248 EUR. A second result is 'January 2013' from 'Innovate UK' to 'Nova INNOVATION Ltd' in 2013 for 5,000 GBP. Below the table, a detailed view of the first award is shown (C), including its Grant ID (643379), start/end dates, funder details, receiving institution (Bic Innovation Ltd, Swansea University), research area, and a description of the project's goals.

Search Filters:

- Search awards: Any(innovation) [A]
- Research discipline
- Recipient country
- Funding type
- Funder
- Funder country
- Funder type
- Award start year
- Amount

Search Results:

412,197 Awards [E] [Analyze search results](#)

Any(innovation) [X] Clear all

☐ All 0 selected [Export as XLS](#) Sort by: Relevance

	Title	Funder	Awardee	Year	Amount
1	INNOVSUPPWALES. Action "Establishing services enhancing the innovation management capacity of SME's in the Enterprise Europe Network" [B]	Horizon 2020 Framework Programme	BIC INNOVATION LTD	2014	13,248 EUR
2	January 2013 [B]	Innovate UK	Nova INNOVATION Ltd	2013	5,000 GBP

Detailed Award View [C]:

INNOVSUPPWALES. Action "Establishing services enhancing the innovation management capacity of SME's in the Enterprise Europe Network"

Grant ID: 643379 • Research Grants • Start date: 1 Jul 2014 • End date: 31 Dec 2014

Funder: [Horizon 2020 Framework Programme](#)

Amount (est): 13,248 EUR

Receiving institution: Bic Innovation Ltd, Swansea University

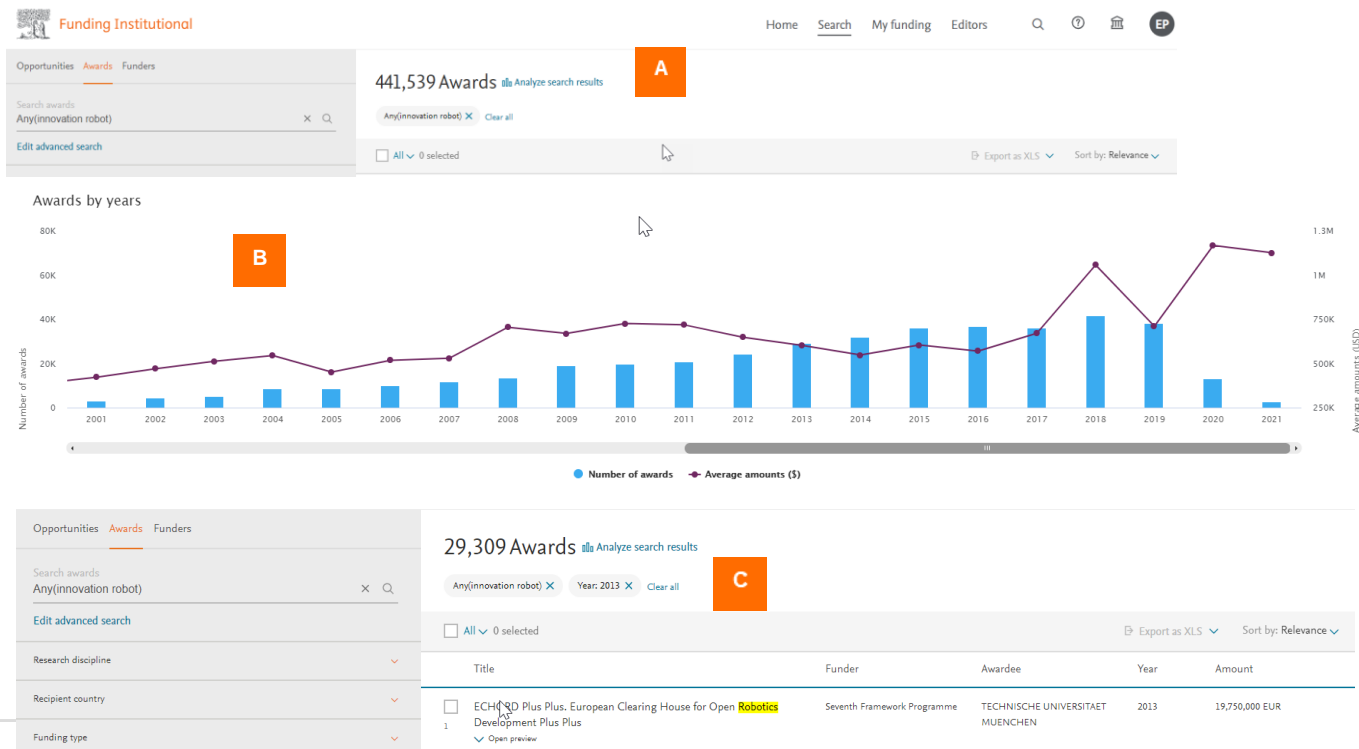
Research Area: Business, Management and Accounting > Management of Technology and Innovation

Description:

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 SME's 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.



Funder Profiles – Search options



Funding Institutional

[Home](#)

[Search](#)

[My funding](#)

[Editors](#)



EP

- 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.

Search

A



Search for: ☐ Opportunities ☐ Awards ☒ Funders



Funding Institutional

[Home](#)

[Search](#)

[My funding](#)

[Editors](#)



EP

Opportunities Awards Funders

Search funders



Funder country

B

Funder type

▼

4,695 Funders

☐ All 0 selected

Export as XLS Sort by: Relevance

	Funder	Country	Opportunities	Awards
1	 U.S. Department of Health and Human Services Governmental Organizations Open preview	The United States	1,921	2,342,256

C



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.

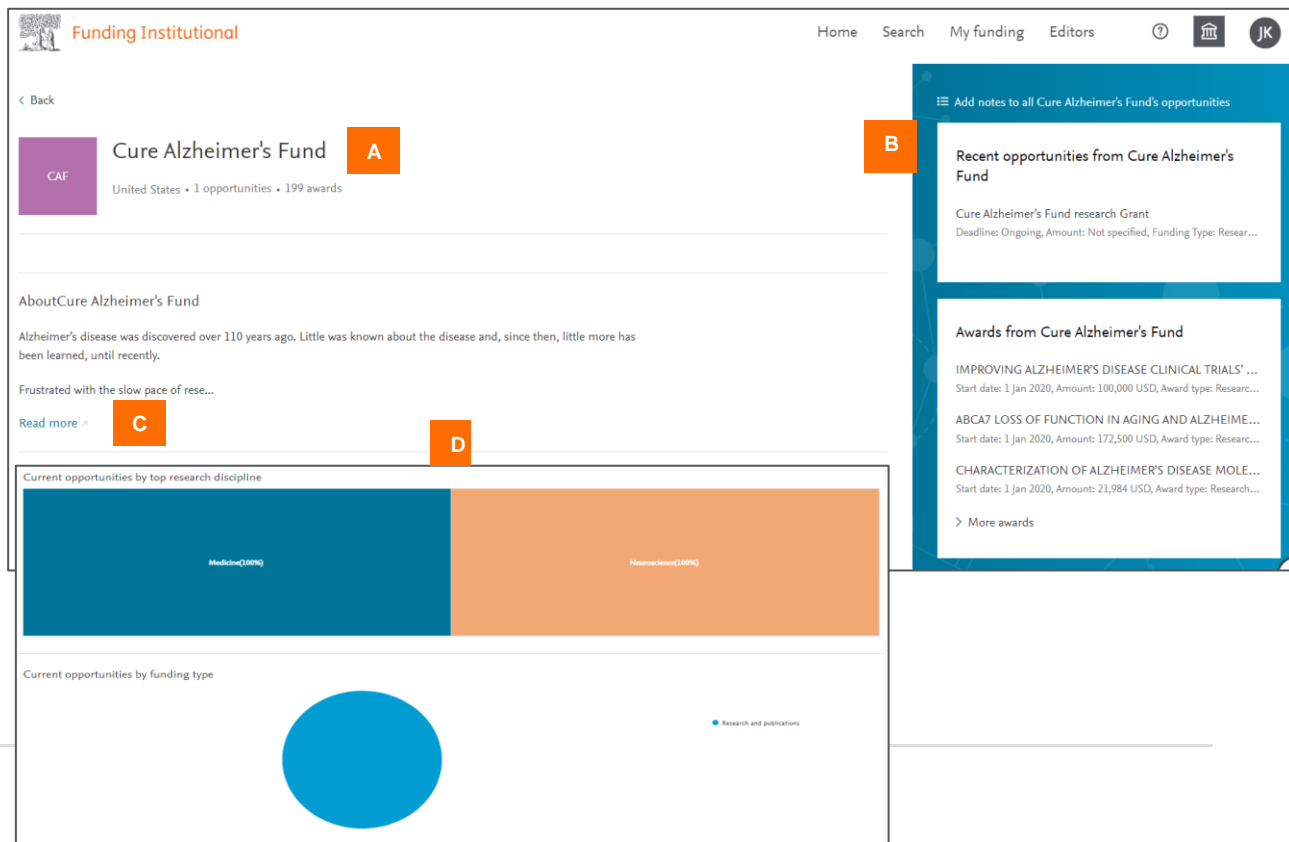


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Funding Institutional User Roles

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

Editors

Internal opportunities

Create your institution's own internal opportunities.
These opportunities are visible only to users of your institution's ecosystem.

5 Internal opportunities

☐ All 5 / 1 selected

[+ Create internal opportunity](#)

[Send to Pure](#)

Title	Last updated by	Last updated on	Status	Actions
Influenza Vaccination Coverage of Population and the Factors Influencing Influenza Vaccination in Mainland China: A Meta-analysis	Ugochika Nwankwo	22 Apr 2020	Unpublished draft	Edit Share
Semi-Supervised	Marie Rios	13 Apr 2020	Unpublished draft	Edit Share
London Arts and Humanities Partnership (LAHP)	Nick Graham	1 Apr 2020	Published & active	Edit Share
The Chadwick Trust - Travelling Fellowships and scholarships	Olivera Petrovic	11 Dec 2019	Published & active	Edit Share
Deadline overdue				
NOVEL AND SAFE TREATMENT FOR TYPE 2 DIABETES	Internal User Only	8 Jul 2019	Unpublished draft	Edit Share

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

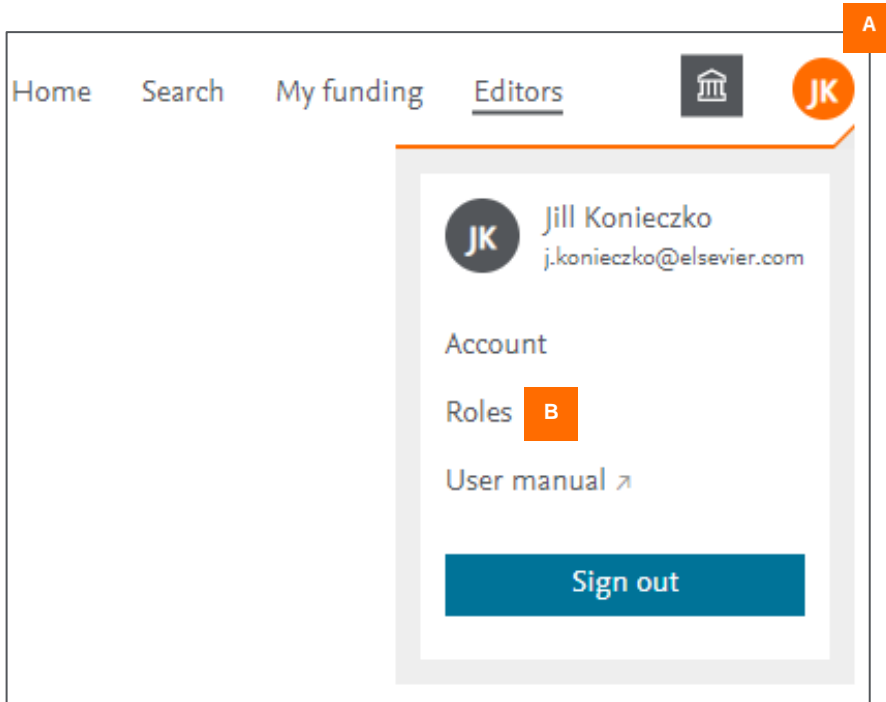
When creating internal opportunities, providing more detail helps to make the record more easily retrieved in search and gives the necessary information to prospective applicants.

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.



Roles: Admins & editors

Roles

As an admin you can search for existing users of your institution's account and assign them to be editors or admins. You can view the full list of editors and admins and manage their roles.

Search

A

B

C

D

Add administration contact person

Abd Elrhaby, Ahmad
a.abdelrhaby@elsevier.com

Amir, Tarek
t.amir@elsevier.com

Amwal, Shadi
s.amwal@elsevier.com

Beal, Scott
s.beal@elsevier.com

Benavides, Tereza
t.benavides@elsevier.com

Boydell, David
d.boydell@elsevier.com

Carey, Tuzanda
t.carey@elsevier.com

Choudhury, Madhusree
m.choudhury@elsevier.com

Du, Tingting
t.du@elsevier.com

Dias, Nelia
n.dias@elsevier.com

Elfrida, Cheryl
c.elfrida@elsevier.com

Evans, David
d.evans@elsevier.com

Fernandez, Carlos Manuel
c.fernandez@elsevier.com

Admin

Editor

Remove role

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.

D

Add administration contact person

You can add contact person information that would be visible for the users at your institution, to let them know who to contact about their Funding Institutional account and permissions.

This information will appear in Profile > Account.

☒ Add administration contact person

* de Groot, Ronald

Additional information

Contact this person for anything you need. Anything at all.

☐ Don't show administration contact person

Cancel Save



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

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

