



ELSEVIER

Funding Institutional User Guide

September 2021



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Note: User Guide coverage of *Funding Institutional Admins & Editors* begins on Slide 32

Understanding the data



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

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

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

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

Home page overview

The screenshot shows the home page layout with callout boxes A through F. Box A points to the top navigation menu (Home, Search, Suggestions, My funding, Editors). Box B points to the search bar area, specifically the magnifying glass icon. Box C points to the search input field and the radio buttons for 'Opportunities', 'Awards', and 'Funders'. Box D points to the 'Suggestions' section. Box E points to the world map. Box F points to the 'Fundings in The United States' table.

A Home Search Suggestions My funding Editors

B Search e.g. neuroscience

C Search for: Opportunities Awards Funders

Welcome back, Eleonora

D **Suggestions**
Connect your Scopus profile and view funding suggestions based on your publications.
[View suggestions >](#)

E **Analyze awards data**
Access insightful information about millions of grants awarded all over the world.
[Analyze awards data >](#)

F **Tracked opportunities**
Track relevant funding opportunities to easily monitor them for changes or approaching deadlines.
[Tracked opportunities >](#)

Fundings in The United States [View all funders >](#)

U.S. Department of Health and Human Services	1921 active opportunities	View funder
National Institutes of Health	1489 active opportunities	View funder

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

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

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

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

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

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

Search overview: Basic

Search

"covid-19" **A** 

Search for: Opportunities Awards Funders **B**

 Funding Institutional **B**

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

[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. The round brackets and the Boolean operators AND, OR and NOT in capital letters can also be used in the basic search.

B. Select the respective data type by clicking on the radio button/tab respective to **Opportunities**, **Awards** and **Funders**.

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

Funding Institutional

Opportunities Awards Funders

Filter by limited submission
 Show only internal opportunities
 Show only recurring opportunities

A

Subject areas

Filter by subject area

- Agricultural and Biological Sciences (12)
- Arts and Humanities (25)
- Biochemistry, Genetics and Molecular Biology (17)
- Business, Management and Accounting (30)
- Chemistry (12)
- Computer Science (10)
- Decision Sciences (6)
- Earth and Planetary Sciences (3)
- Economics, Econometrics and Finance (11)
- Energy (10)

[View more](#)

Funding type

- Artistic pursuit (1)
- Contract, tender or cooperative agreement (8)
- Equipment and facilities (2)
- Fellowships, scholarships or trainings (1)

[View more](#)

Funder

Type funder name

Funder country/region

Type country or region...

- The Netherlands

Exclude selected countries/regions

B

C

A. Use the respective filters to restrict opportunities by special application features such as **Limited Submission, Recurring Opportunities** and **Internal opportunities**. Internal opportunities are created by Administrators and Editors, who have elevated permissions to create, modify and delete internal opportunities, which are only viewable from within an institution.

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

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

Search tips

- The basic search includes Boolean Operators in capital letters: AND, OR and NOT and round brackets.
- The wildcard (*) finds multiple words entering a few characters.
- Using the singular form of a word in your search finds both the singular and plural forms for most words.

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

- To find documents where your search terms appear together, enclose your phrase in double quotes.

For example, “stem cell” returns documents with both stem and cell. Without double quotes, *stem cell* returns documents with the words either *stem* or *cell* or *stem* and *cell* throughout the document and not necessarily together.

Working with search results

The screenshot shows the 'Funding Institutional' search results page for the query 'Artificial Intelligence'. The page displays 374 funding opportunities. On the left, there is a sidebar with 'Saved searches' (labeled C) and 'Subject area' (labeled A). The main content area shows a list of opportunities with various actions (labeled D and E) and a 'Read more' link (labeled B). The opportunities listed include 'Student Travel Awards', 'Artificial Intelligence for Autonomous Systems', 'Artificial Intelligence, Robotics and Autonomous Systems', and 'Neuroradiology Research Grant Its Artificial Intelligence'. The page is sorted by 'Relevance'.

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

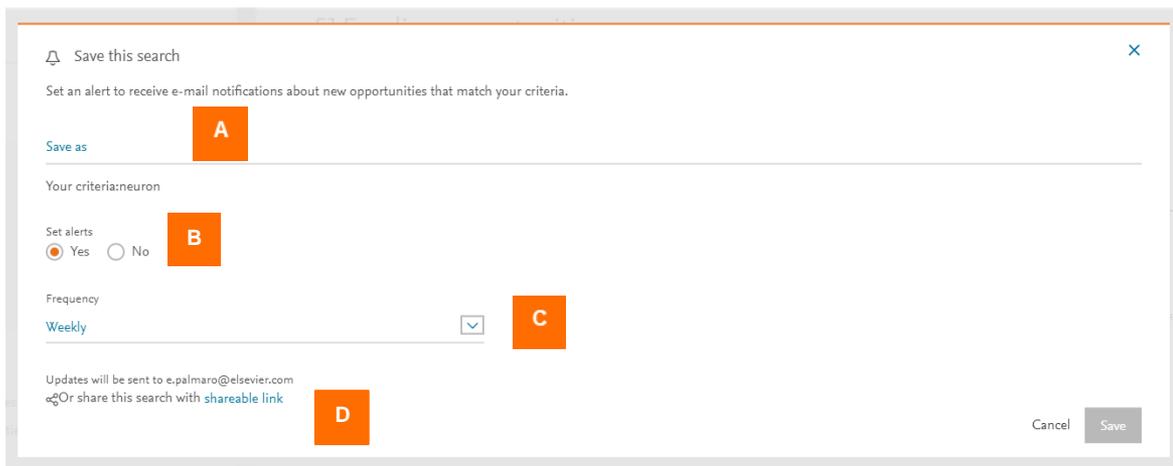
B. Use **Read more** or click on the hyperlinked opportunity title to view the full record.

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

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

E. Click on the three dots to add **Notes** to opportunities which can be viewed by others within your institution. Selected opportunities can be exported via either CSV or XLS for review and analysis.

Saving searches



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

- A:** A text input field labeled 'Save as' with a cursor.
- B:** Radio buttons for 'Set alerts', with 'Yes' selected.
- C:** A dropdown menu for 'Frequency' currently set to 'Weekly'.
- D:** A text field showing the email address 'e.palmaro@elsevier.com' and a 'shareable link' icon.

Buttons for 'Cancel' and 'Save' are located at the bottom right of the dialog.

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

E

F

Overview

Description

Eligibility

D

Contact

Deadlines

Announcement

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;

A

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

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. 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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Similar opportunities

Collaborative Bilateral Research Program Bavaria-Québec - Artificial Intelligence in Health

ID: 501300263845 • Research and publications • Last updated: 6 Sep 2021

[☆ Track](#) [↻ Share](#) [📄 Send to Pure](#) [📝 Add opportunity notes](#) [📄 Add funder notes](#)

Opportunity details **Similar Opportunities**

A

Similar opportunities are suggested based on the keywords and filters from your initial search and the selected opportunity.

Solutions Program - Addictions Focus: Impact Grant

[Saskatchewan Health Research Foundation](#) • Programs and projects

Purpose

The Solutions Program aims to mobilize the research ecosystem to focus and coordinate diverse skills and perspectives to address timely Saskatchewan health challenges. All applicati... [Read more](#)

Mid-career and experienced researchers Early career and new faculty researchers Commercial organizations

Deadline in about 11 weeks Application, 30-Nov-2021 

[☆ Track](#) [↻ Share](#) [📄 Send to Pure](#) How similar is this opportunity?  

B

Up to 150,000 CAD with total funding of 1,000,000 CAD

- Click on the **Similar Opportunities** tab of the opportunity's details page to see up to 10 opportunities defined similar based on the keywords and filters from the initial search and the selected opportunity.
- Click on thumb up or down to provide a feedback about how similar the opportunity is compared to the selected opportunity.

Should I apply? – Select your institution

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

ID: 501300264098 • Research and publications • Last updated: 10 Sep 2021

☆ Track ↻ Share 📧 Send to Pure 📝 Add opportunity notes 🏠 Add funder notes

Opportunity details Similar Opportunities Should I apply?

A

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

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

The screenshot shows the user profile page for Eleonora Palmaro. The 'Account' section is active, displaying a 'Select your institution' form. The current institution is 'Massachusetts Institute of Technology'. A search box is provided for entering a new institution name, and an 'Update' button is at the bottom.

Editors ? 🏠 **EP**

EP Eleonora Palmaro
e.palmaro@elsevier.com

B

Account
Roles
Privacy center ↗

Sign out

Select your institution

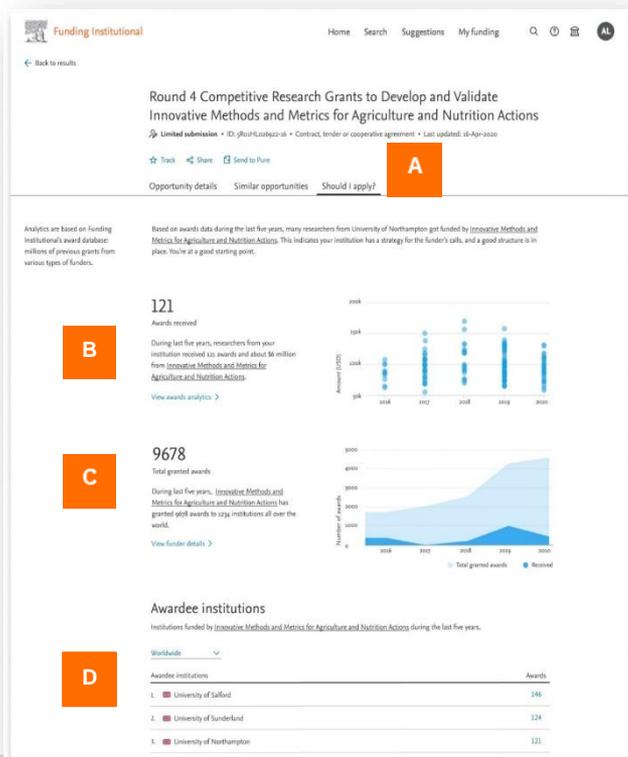
We provide analytics based on your institution's award history.

Your institution: **Massachusetts Institute of Technology**

Type institution name

Update >

Should I apply?



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

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

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

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

Note: if the awards of the opportunity's funder are not included in Funding Institutional, the Should I apply? tab does not show B, C and D.

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: All tracked opportunities can be accessed via the home page.

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

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

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

Sharing opportunities

Share opportunity ×

Share via Email

[Add email address](#) **A**

Add a message (optional) **B**

Share via link

<https://www.fundinginstitutional.com/opportunities/501300256839> **C** [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.

Send to Pure

Send opportunity to Pure ×

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

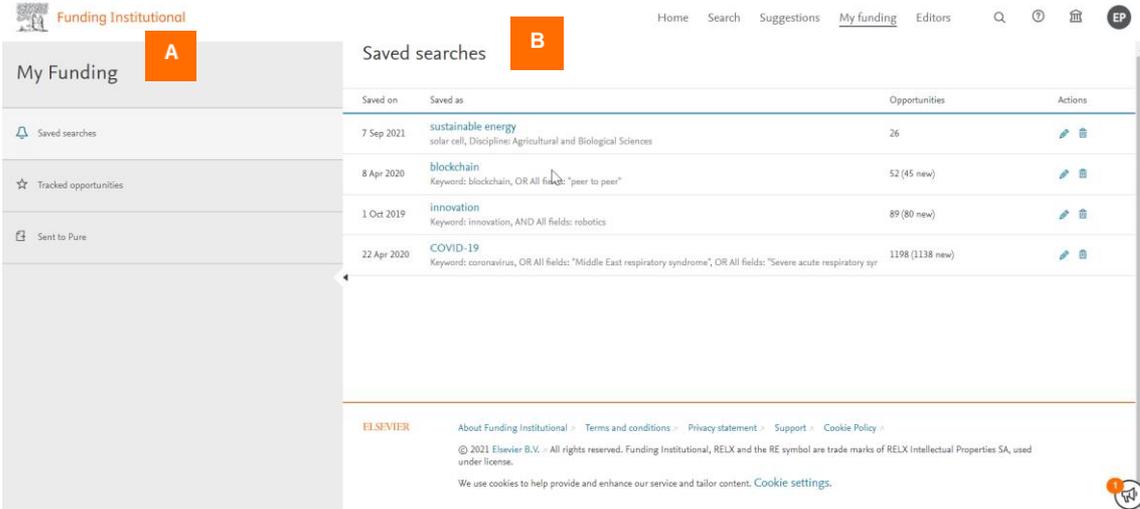
[Create new label](#)  A

[Cancel](#) [All set, send >](#)

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

A. In the **Send to Pure** window, entering a label will help to organize the funding opportunities, and make them more easily retrieved, in Pure.

My Funding Overview and Saved Searches



The screenshot shows the 'My Funding' interface. On the left, a sidebar contains 'My Funding' with an orange 'A' label, 'Saved searches', 'Tracked opportunities', and 'Sent to Pure'. The main content area is titled 'Saved searches' with an orange 'B' label. It displays a table of saved searches with columns for 'Saved on', 'Saved as', 'Opportunities', and 'Actions'. The table lists three searches: 'sustainable energy' (26 opportunities), 'blockchain' (52 opportunities, 45 new), 'innovation' (89 opportunities, 80 new), and 'COVID-19' (1198 opportunities, 1138 new). The footer includes the Elsevier logo and copyright information.

Saved on	Saved as	Opportunities	Actions
7 Sep 2021	sustainable energy solar cell, Disciplines: Agricultural and Biological Sciences	26	
8 Apr 2020	blockchain Keyword: blockchain, OR All fields: "peer to peer"	52 (45 new)	
1 Oct 2019	innovation Keyword: innovation, AND All fields: robotics	89 (80 new)	
22 Apr 2020	COVID-19 Keyword: coronavirus, OR All fields: "Middle East respiratory syndrome", OR All fields: "Severe acute respiratory syr	1198 (1138 new)	

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

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

My Funding – Tracked Opportunities

The screenshot shows the 'My Funding' page on the Elsevier website. The page is titled 'Tracked opportunities' and features a table with columns for 'Groups', 'Opportunities', and 'Actions'. The table lists several groups: 'All' (622 opportunities), 'Not grouped' (6 opportunities), 'COVID-19' (48 opportunities), and 'Sustainability' (1302 opportunities). An orange square labeled 'A' is positioned over the 'COVID-19' group, and another orange square labeled 'B' is positioned over the 'Sustainability' group. The 'Actions' column contains icons for untracking and deleting folders. The page also includes a navigation menu, a search bar, and a footer with copyright information and a cookie notice.

Groups	Opportunities	Actions
All	622	
Not grouped	6	
COVID-19	48	
Sustainability	1302	

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 Suggestions My funding Editors Q ⓘ ⓘ EP

My Funding

- Saved searches
- Tracked opportunities
- Sent to Pure

Sent to Pure

Labels	Opportunities	Actions
artificial intelligence	3	🗑️
COVID-19 A	1586	🗑️
data science	2	🗑️
math	1	🗑️

B

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We use cookies to help provide and enhance our service and tailor content. [Cookie settings](#)

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.

Suggestions – Recommended opportunities

Funding Institutional

Home Search **Suggestions** My funding Editors

+ Add new researcher

B

D Suggestions for

C On Scopus

0 selected ☆ Track ≡ Share 📄 Send to Pure ⋮

Robotic Swarm Autonomy Not specified

Oak Ridge Associated Universities • Research and publications

This research develops behaviors and controllers for multi-agent, heterogeneous, robotic swarms. It will enable vehicles to move, orient, and collaborate in complex missions with limited human supervision. [Read more](#)

Deadline is not specified

☆ Track ≡ Share 📄 Send to Pure | ✕ Remove this suggestion

Understanding content and conversational context in human-robot dialogue Not specified

Oak Ridge Associated Universities • Research and publications

This research opportunity explores the development and application of computer-readable markups of natural language, twoway dialogue between a human and a robot, where the markup makes explicit the... [Read more](#)

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

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

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

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

For more information on Scopus Author Profiles, please visit <https://www.elsevier.com/solutions/scopus/why-choose-scopus/visibility/author-profiles>

Recommended opportunities – Adding a new researcher



Add a researcher

Add a researcher by connecting a Scopus author profile.

Search Scopus profile by:

Name Scopus author ID ORCID

First name Last name Affiliation(optional)

Search Scopus profile >

Cancel Add researcher >

A. From the **Suggestions** module, click on the **Add new researcher** link.

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

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

D. Select the seniority. Confirm or edit the *activity country/region* and the *affiliation country/region*.

Seniority

Early career researchers
 Mid-career researchers
 Senior researchers

Activity country/region

Type country or region...

France
 Italy
 Iran, Islamic Republic of

Affiliation country/region

Type country or region...

Cancel Add researcher >

Recommended opportunities – Reviewing results



Funding Institutional

Home Search Suggestions My funding Editors

+ Add new researcher

Suggestions for

[Edit researcher profile](#) [Delete this researcher](#)

B

0 selected [Track](#) [Share](#) [Send to Pure](#) ...

On Scopus >

Robotic Swarm Autonomy

Not specified

[Oak Ridge Associated Universities](#) • Research and publications

This research develops behaviors and controllers for multi-agent, heterogeneous, robotic swarms. It will enable vehicles to move, orient, and collaborate in complex missions with limited human supervision. [Read more](#)

A

Deadline is not specified

[Track](#) [Share](#) [Send to Pure](#) | [Remove this suggestion](#)

C

Understanding content and conversational context in human-robot dialogue

Not specified

[Oak Ridge Associated Universities](#) • Research and publications

This research opportunity explores the development and application of computer-readable markups of natural language, twoway dialogue between a human and a robot, where the markup makes explicit the... [Read more](#)

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

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

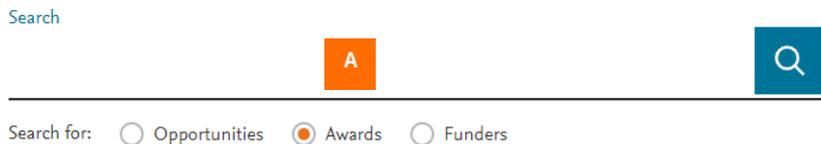
C. Opportunities that fall outside a researcher's scope can be removed. If one opportunity is removed an extra one will be displayed. A maximum of 20 opportunities can be replaced with other suggested opportunities (if relevant ones are available).



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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*



Search awards  **B**

[Advanced search](#)

Research discipline 

Recipient country/region 

6,794,387 Awards [Analyze search results](#)

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

	Title	Funder	Awardee	Year	Amount
<input type="checkbox"/> 1	Accelerating Translational Development of Novel Antigens for an Enterotoxigenic E. coli Vaccine	National Institute of Allergy and Infectious Diseases	KUHLMANN M. FREDERICK, WASHINGTON UNIVERSITY	2021	75,123 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 **Awardee Institution**, **Recipient country** and **Funder** can be used to narrow down search results.

The screenshot displays the 'Funding Institutional' search interface. The main navigation bar includes 'Home' and 'Search'. Below the navigation, there are tabs for 'Opportunities', 'Awards', and 'Funders'. The 'Search awards' section is active, with a search box labeled 'A'. Below this, there are several filter fields: 'Research discipline', 'Recipient country', 'Funding type', 'Funder', 'Funder country', 'Funder type', 'Award start year', and 'Amount'. The 'Funder' field is highlighted with a red box labeled 'C'. An 'Advanced search' modal is open, showing four search options: 'All of these words' (with a red box labeled 'B'), 'Any of these words', 'None of these words' (with a red box labeled 'C' and a cursor), and 'Prioritized words'. Each option has a corresponding explanation of its search logic. A light blue tip at the bottom of the modal suggests using double quotes for phrases. The modal has '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 or CSV files.
- 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. The top navigation bar includes 'Home', 'Search', 'Suggestions', 'My funding', and 'Editors'. The 'Awards' tab is selected, showing 6,794,387 awards. A search filter sidebar on the left includes 'Search awards', 'Advanced search', 'Research discipline', 'Recipient country/region', 'Awardee institution', 'Funding type', 'Funder', 'Funder country/region', and 'Funder type'. The main results table shows two entries:

Title	Funder	Awardee	Year	Amount
1 Accelerating Translational Development of Novel Antigens for an Enterotoxigenic E. coli Vaccine	National Institute of Allergy and Infectious Diseases	KUHLMANN M. FREDERICK, WASHINGTON UNIVERSITY	2021	75,123 USD
2 New mechanism on regeneration	National Institute of Neurological Disorders and Stroke	HAMMARLUND MARC, YALE UNIVERSITY	2021	77,666 USD

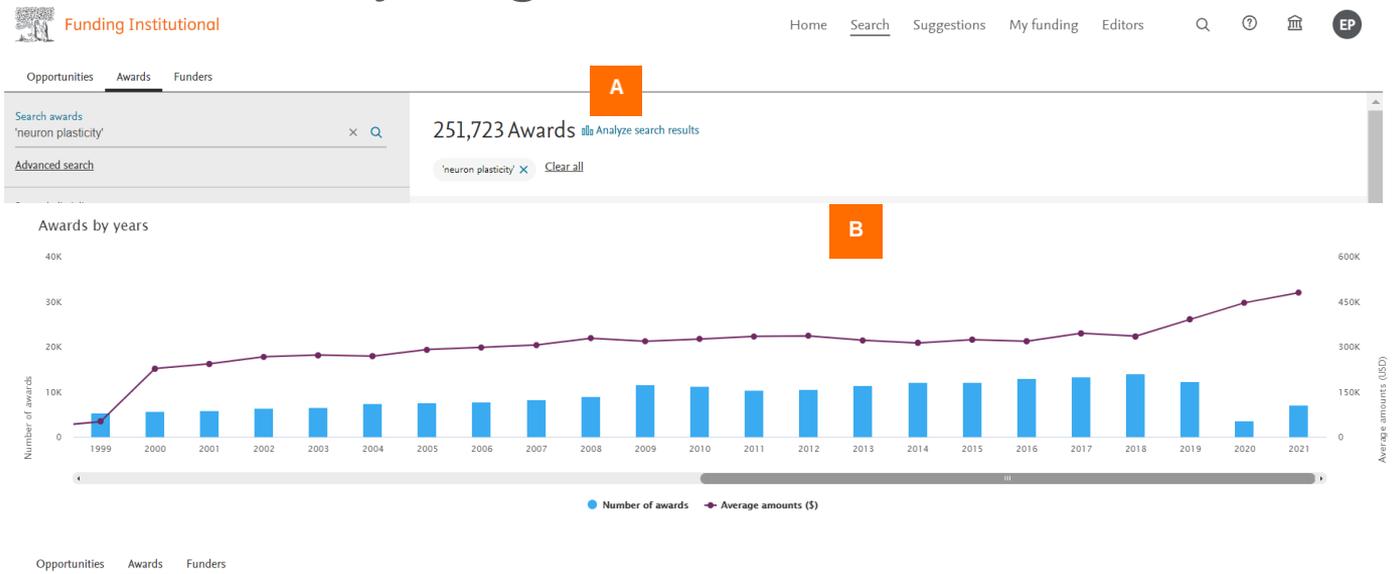
The detailed view of the second award shows the following information:

- Title:** 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 2024
- 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

The 'Description' section states: "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.



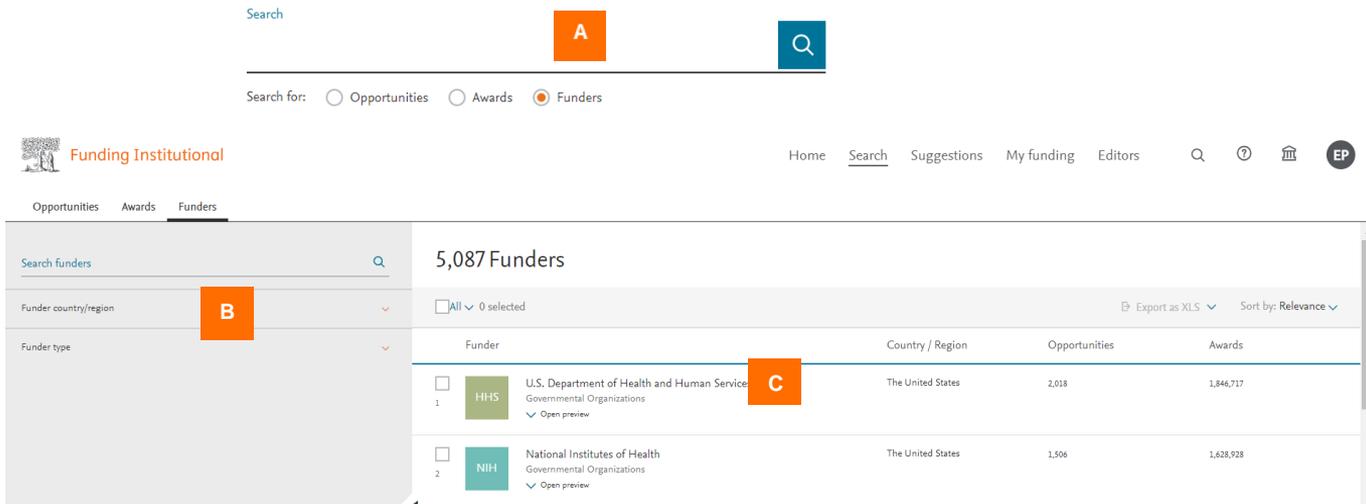
10,430 Awards

Search filters: 'neuron plasticity', Year: 2011

Title	Funder	Awardee	Year	Amount
1 Grant to Plastic Oceans Open preview Missing: neuron	Esmée Fairbairn Foundation	Plastic Oceans	2011	65,000 GBP
2 Regulation of GnRH1 neuron morphological plasticity Open preview	National Institute of Neurological Disorders and Stroke	MARUSKA P. KAREN, STANFORD UNIVERSITY	2011	53,042 USD

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.



The screenshot shows the 'Search' page of the Funding Institutional website. At the top, there is a search bar with a magnifying glass icon and a blue search button. Below the search bar, there are radio buttons for 'Opportunities', 'Awards', and 'Funders', with 'Funders' selected. The page header includes the 'Funding Institutional' logo and navigation links: Home, Search, Suggestions, My funding, Editors, and a user profile icon labeled 'EP'. Below the search bar, there are tabs for 'Opportunities', 'Awards', and 'Funders', with 'Funders' selected. The main content area shows a search for '5,087 Funders'. There are filters for 'Funder country/region' and 'Funder type'. The search results are displayed in a table with columns for 'Funder', 'Country / Region', 'Opportunities', and 'Awards'. Two results are shown: 1. U.S. Department of Health and Human Services Governmental Organizations (HHS) with 2,018 opportunities and 1,846,717 awards. 2. National Institutes of Health Governmental Organizations (NIH) with 1,506 opportunities and 1,628,928 awards. Each result has an 'Open preview' link. The table also includes an 'Export as XLS' button and a 'Sort by: Relevance' dropdown.

Funder	Country / Region	Opportunities	Awards
1  U.S. Department of Health and Human Services Governmental Organizations Open preview	The United States	2,018	1,846,717
2  National Institutes of Health Governmental Organizations Open preview	The United States	1,506	1,628,928

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 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 shows the 'Funding Institutional' profile for the European Commission. The page includes a navigation bar at the top with links for Home, Search, Suggestions, My funding, Editors, and a search icon. A sidebar on the right contains a section for 'Add notes to all European Commission's opportunities', 'Recent opportunities from European Commission' (listing three projects with deadlines and funding amounts), and 'Awards from European Commission' (listing one award).

Annotation A points to the 'European Commission' header, which includes the EC logo and statistics: 'European Union • 1,104 opportunities • 65,073 awards'.

Annotation B points to the 'Recent opportunities' section.

Annotation C points to the 'Read more' link under the 'About the European Commission' section.

Annotation D points to the 'Current opportunities by funding type' section, which features a horizontal stacked bar chart and a pie chart.

Funding Type	Count
Social sciences	28%
Agricultural and biological sciences	14%
Environmental science	14%
Energy	12%
Computer science	9%
Engineering	9%
Other Areas	12%

Funding Type	Count
Research and publications	1
Programs and projects	1
Contract, tender or cooperative agreement	1
Prizes	1
Travel and Conferences	1
Equipment and facilities	1
Artistic pursuit	1

Table of Contents – Funding Institutional Admins & Editors

- 33. Funding Institutional User Roles
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- 39. Managing roles
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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



Editors Module & Notes

The screenshot shows the 'Editors' module interface. At the top right, there is a navigation bar with 'Home', 'Search', 'Suggestions', 'My funding', and 'Editors' (highlighted with callout A). Below this is a search bar and user profile icons. The main content area is titled 'Editors' and contains two sections: 'Notes' and 'Internal opportunities' (highlighted with callout B). The 'Notes' section has a sub-header 'Notes' and a description: 'Manage all the notes for opportunities and funders that were added by editors and admins of your institution's account. These notes will appear in the opportunity details page or in the funder page and will be visible only to users of your institution's account.' Below this are tabs for 'Opportunity notes' and 'Funder notes'. A table lists '1 Opportunity notes' with a table header and one row. The table header includes 'Noted opportunity', 'Noted funder', 'Last updated on', 'Last updated by', and 'Actions'. The row contains 'Environmental epigenomics', 'Daniela Pohoata', '29 Jul 2020', and 'Daniela Pohoata' (highlighted with callout E). Above the table is a toolbar with 'Delete notes', 'Track', 'Export as XLS', 'Share', and 'Send to Pure' (highlighted with callout D). A callout C points to the 'Noted opportunity' column header.

Editors

Notes

Manage all the notes for opportunities and funders that were added by editors and admins of your institution's account. These notes will appear in the opportunity details page or in the funder page and will be visible only to users of your institution's account.

Opportunity notes Funder notes

1 Opportunity notes

All 0 selected

Delete notes Track Export as XLS Share Send to Pure

Noted opportunity	Noted funder	Last updated on	Last updated by	Actions
<input type="checkbox"/> Environmental epigenomics		29 Jul 2020	Daniela Pohoata	

A. The **Editors** module is accessible only for users who have the elevated Editors and Administrators permissions.

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

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

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

E. **Notes** can be edited or deleted.

Opportunity Notes

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 to send multiple emails.

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

Supplementary materials, such as presentations or spreadsheets, can be added to the record, too.

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 to send multiple emails.

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

Supplementary materials, such as presentations or spreadsheets, can be added to the record, too.

Internal opportunities

Funding Institutional

Home Search Suggestions My funding Editors Q ? ⓘ EP

Internal opportunities

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

1 Internal opportunity

All 0 selected

Title	Last updated by	Last updated on	Status	Actions
<input type="checkbox"/> Partner with Chinese bioscience laboratories 1	Eleonora Palmaro	10 Sep 2021	Unpublished draft	

+ Create internal opportunity

Share Send to Pure

A. **Internal opportunities** is a feature of the Editors and Admins module, and is available only to Editors and Admins, who have elevated privileges. Internal opportunities are available for viewing only within an institution.

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

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

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

Creating internal opportunities

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.

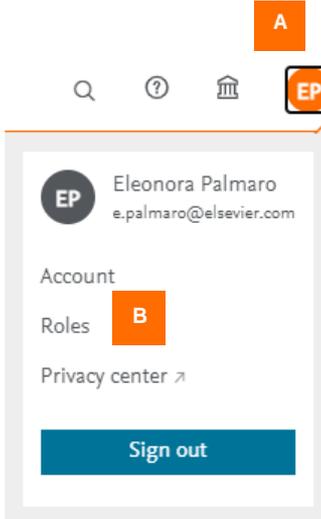
Fields include the opportunity title and ID, funding type, opportunity description, deadlines, award value, applicant eligibility, point of contact name and information and supplementary information that can be added as additional files (up to 10 and in multiple file formats including PDF and XLS.)

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



Managing roles

[Home](#) [Search](#) [Suggestions](#) [My funding](#) [Editors](#)



The screenshot shows the top navigation bar of the Elsevier system. On the right side of the toolbar, there is a search icon, a help icon, a home icon, and a profile icon labeled 'A'. The profile icon is a blue square with the letters 'EP' in white. Below the profile icon, a dropdown menu is visible, which is highlighted with a grey border. The dropdown menu contains the following items: a circular profile icon with 'EP', the name 'Eleonora Palmaro', the email 'e.palmaro@elsevier.com', a section header 'Account', a 'Roles' link with a blue square icon labeled 'B', a 'Privacy center' link with an external link symbol, and a blue 'Sign out' button.

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

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

Roles: Admins & editors



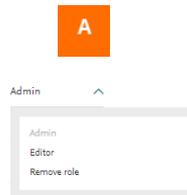
Roles

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

Admins

Add administration contact person



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

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

Admins are listed separately from Editors.

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

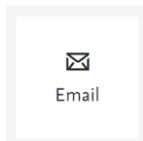
B. An administration contact person can be added.

B

A screenshot of a dialog box titled 'Add administration contact person'. The dialog contains the following text: '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.' Below this, there are two radio buttons. The first is selected and is labeled 'Add administration contact person'. Underneath it, the name '* de Groot, Ronald' is displayed next to a dropdown arrow. Below the name, there is a section for 'Additional information' with the text 'Contact this person for anything you need. Anything at all.' and a text input field. The second radio button is labeled 'Don't show administration contact person'. At the bottom right of the dialog, there are 'Cancel' and 'Save' buttons.

Funder Data Requests

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



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

See also: Elsevier Funding Content Scope and Selection Procedure

<https://www.elsevier.com/solutions/funding-institutional/data-sources>



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Funding Institutional User Guide

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