



# Funding Institutional Quick Start Guide

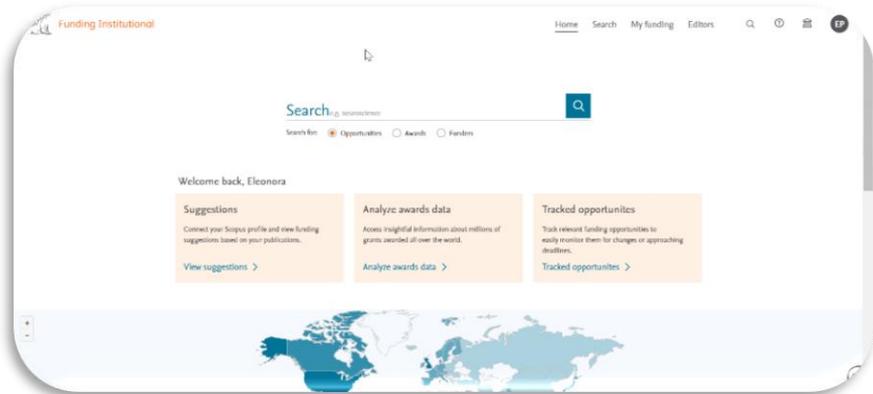
# SEARCHING FOR FUNDING

There are two ways to search the Funding area in Funding Institutional: Quick search and Advanced search.

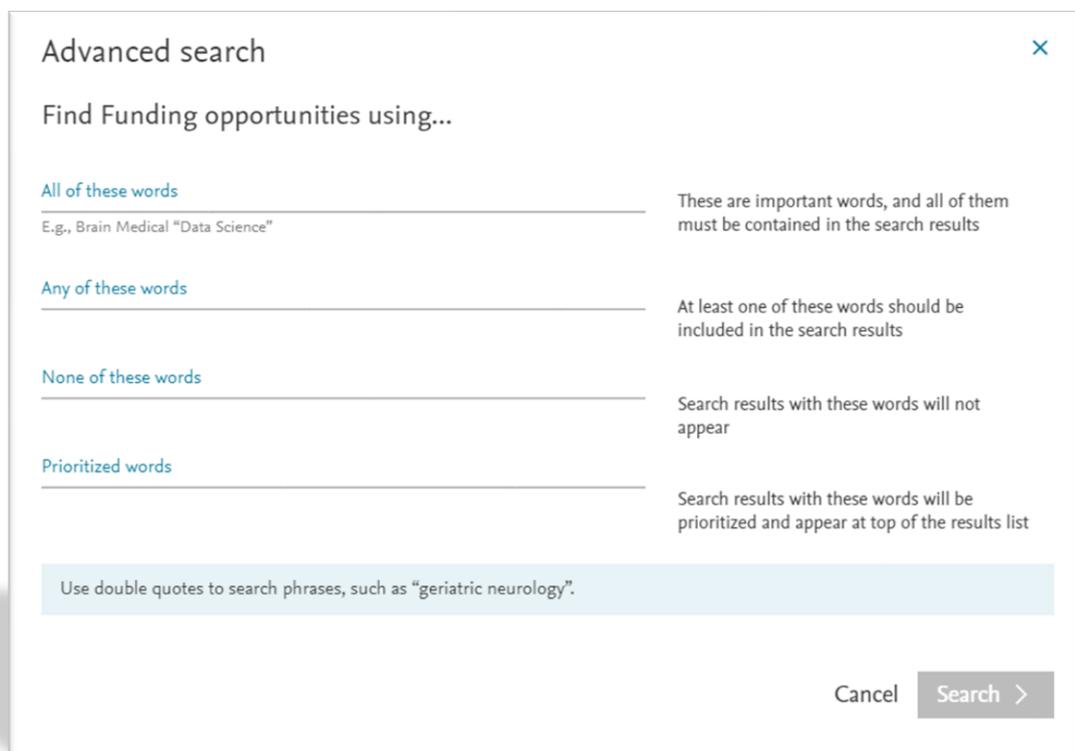
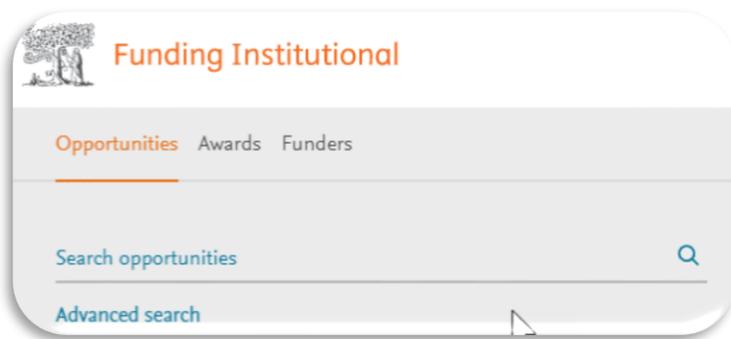
## QUICK SEARCH

Use the Quick Search feature to search all fields of the funding opportunities in the database. The results of a Quick Search are always ranked by relevancy.

- 1) Enter your search terms into the text box.
- 2) Click *Search*.



## ADVANCED SEARCH



- 3) Click on *Advanced Search*.

4) Enter the keywords in the different fields (*All, Any, None* and *Prioritized*).

- A. Enter keywords in the **All of these words** field. All these words, in any order or combination, must be contained in the search.
- 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 functionality as the basic search, which appears on the home screen.
- C. Enter keywords in the **None of these words** field. 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.

5) Click on *Search*.

6) Add filters to your original research (Limited submission, Recurring Opportunities, Internal Opportunities, Research discipline, Funding type, Funder, Funder country/region, Funder Type, Applicant citizenship, Applicant country/region affiliation, Applicant type, Activity country/region, Application deadline, Amount).

Helpful Hints:

- The search does not include the Boolean Operators, AND, OR or NOT.
- Singular and plural treatments are automatically retrieved; for example, searching cancer will automatically find cancers.
- The wildcard (\*) allows for stem searching and finds multiple words entering a few characters, such as cancer\* which would retrieve cancer and cancerous.
- To find documents where your search terms appear together, enclose your phrase in double quotes, such as "stem cell."

# SAVING, TRACKING AND SHARING

## SAVING A SEARCH

- 1) From the results list, click *Save search*.
- 2) Enter a name for your saved search in *Save as*.
- 3) indicate whether you want to receive an alert for updates regarding your saved search or not, using the *Set alerts*.
- 4) If you opt to receive alerts, you must select an *Alert frequency*.
- 5) Click *Shareable link* to copy a hyperlink to this saved search for your personal distribution.
- 6) Click *Save*. You can see your saved research in *My Funding*.

## TRACKING OPPORTUNITIES

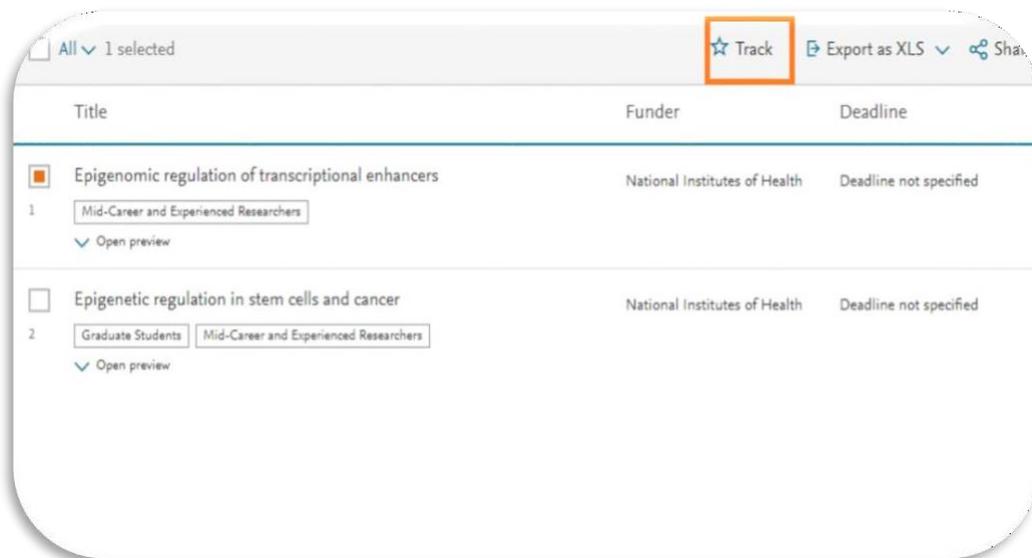
*Tracking Funding Opportunities* in your account allows you to easily find and monitor them for changes or approaching deadlines. Once you track an opportunity, the opportunity is marked with a blue star. This helps you to identify the tracked opportunity easier. Additionally, you can set alerts if you want to be notified when the metadata of a tracked opportunity is changed or the deadlines are approaching, as well as assign it to groups.

There are two ways to track funding opportunities. First is tracking items from the search results list.

The second is directly from an Opportunity Details page.

## FROM THE FUNDING RESULTS LIST

- 1) From your results list, select one or more list items to track.
- 2) From the results list, click **Track**.



## FROM THE OPPORTUNITY DETAILS PAGE

- 1) Click the opportunity name from the search results page to view the complete details.
- 2) Click **Track**.
- 3) You can: either add an opportunity to the *Tracked Opportunities* list, without setting up email alerts or assigning the opportunity to groups.
- 4) Set *Alerts* for a tracked opportunity.

### ASSIGN A TRACKED OPPORTUNITY TO GROUPS

- 1) From the *Track* opportunity form, click *Assign to group*.
- 2) You have option to do one of the following:
  - If you have already created groups, you can choose the group name and click *Add*.
  - If you haven't any created groups or you want to create a new group, click on *Create a newgroup*, then type the name of the group and click on the *Create* button.
  - A tracked opportunity can be assigned to multiple groups, either new or already created.

### SHARING AN OPPORTUNITY

You can share funding opportunities with two ways within Funding Institutional:- from the search results list and from the details page.

#### FROM A SEARCH RESULTS LIST

- 1) Go to the opportunities results list and select one or more items to share.
- 2) Click *Share*.
- 3) Enter one or more e-mail addresses of the people that you wish to share this search with.
- 4) Include an optional note.
- 5) Click *Share*.
- 6) An email message will be sent to the recipient email addresses listed on the Share opportunities form. Each recipient will receive an individual email.

**Share opportunity**

Share this opportunity with others.

**Shareable link** Copy link

<https://www.fundinginstitutional.com/opportunities/501300231180>

**Email**

Type an email address for one or more recipients. Separate multiple addresses by pressing Enter.

Email address

Add note to recipients (optional)

You previously shared this with

Cancel Share

#### SHARING AN OPPORTUNITY FROM THE DETAILS PAGE

- 1) Select the opportunity you wish to share from the results list.
- 2) In the details page click *Share*.
- 3) An email message will be sent to the recipient email addresses listed on the *Share* the selected opportunities form. Each recipient will receive an individual email.

## SHARING A GROUP OF OPPORTUNITIES FROM YOUR TRACKED LISTS

There are two ways to share a group:

1. Public Share Link
2. By email

1) If you choose to share by using the *Public Share Link*, click on *Copy Link* and the link will be copied to clipboard.

You can paste the *Public Shared Link* in your communication or on a webpage.

2) If you choose to share by email, then enter one or more email addresses to share the list of opportunities with multiple email addresses can be added by pressing *Enter* after each email address has been typed.

An individual email will be sent to each of the recipient email addresses.

## NEED MORE HELP?

The User Manual is available online to learn more about Funding Institutional. Click on *User Manual* after you log in to your Elsevier account.

