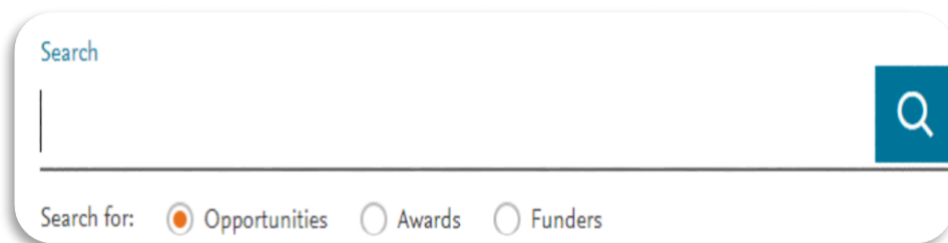# Funding Institutional

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.
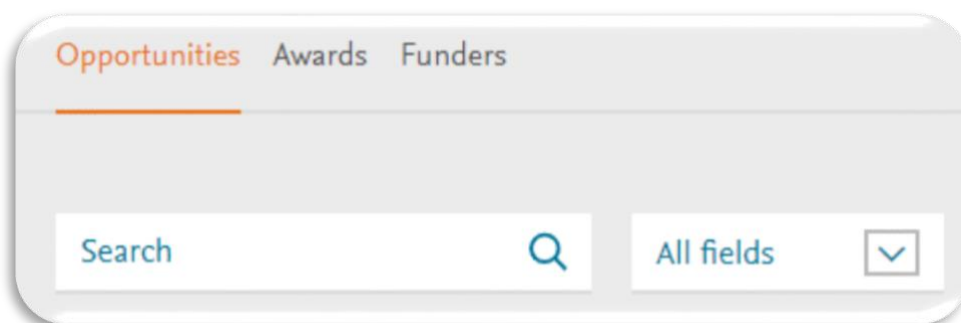The results of a quick Search are always ranked by relevancy.

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

ADVANCED SEARCH

Allows you to search with some combination criteria to build complex searches.

3) Start by entering your search term in the search field.
4) Click on the drop-down menu to select which field to search (**All Fields, Abstract, Title, Opportunity Number, Funder**).
5) If additional rows are needed, click **Add row.**
6) Add filters to broaden your original research (**Limited submission, Research discipline, Funding type, Citizenship, Funder type, Applicant type, Funder country, Application deadline, Amount Funder.**)
7) Click **Search.**

Helpful Hints:
- Using the singular form of a word in your search finds both the singular and plural forms for most words.
- The **Boolean operator** AND narrows your search so you will see fewer funding opportunities, while OR broadens your search.
- To find documents where your search terms appear together, enclose your phrase in **double quotes**. (eg. "stem cell").
- Searching a word with an **asterisk (*)** at the beginning or at the end of the word will search all variations of this word that start or end with the same letters. Use it with distinctive word stems to retrieve variations of a term with less typing
- Also note that If you want to be updated for new opportunities **save your searches and set alerts.**

SAVING, TRACKING AND SHARING

SAVING A SEARCH

1) From the results list, click **Save search/set alert**.
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**.
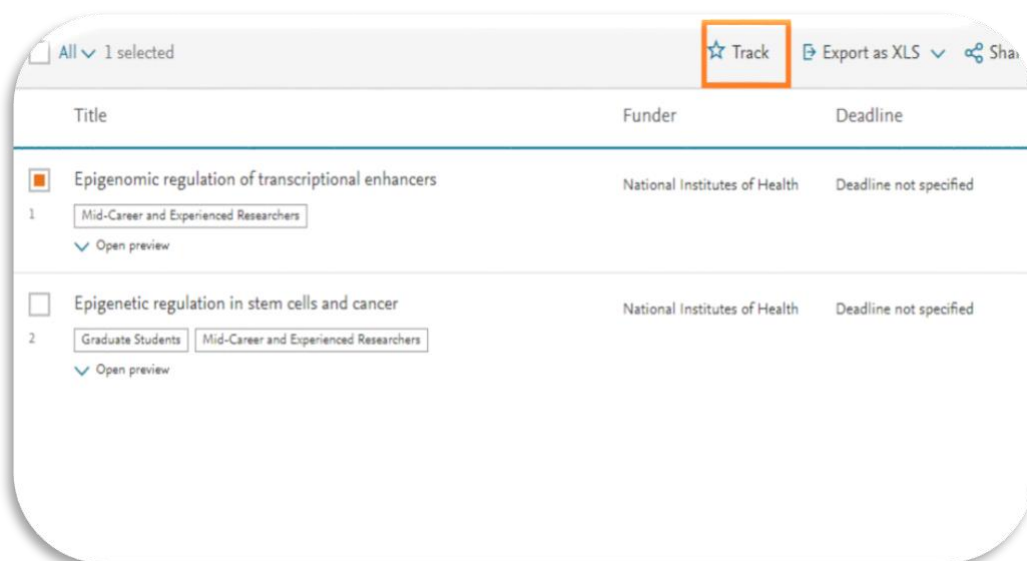
TRACKING OPPORTUNITIES

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 and appears in every page of Funding Institutional (the landing page, the funder page, the search results page, the Tracked opportunities page) with the blue star. This helps you to identify the tracked opportunity easier. Additionally, you can set alerts if you want to be notified for new opportunities by email when the metadata of a tracked opportunity is changed, as well as assign them to groups.

There are two ways to save 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.

SETTING ALERTS FOR A TRACKED OPPORTUNITY
1) Click the opportunity name from the search results page to view the complete details
2) Click on **Track**
3) You can add an opportunity to the Tracked Opportunities list and set up email alerts (daily, weekly, monthly).

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 new group, then type the name of the group and click either on the Create New button or click Enter.
• 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 FI- 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.

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:

- Public Share Link
- 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.

   Note: Optionally, you can enter a note for the recipients of the email. Also, regardless of which method you choose to share the list of opportunities from a group, the institution members will be able to view the shared list, without being required to login. But they should be inside the IP Network of the institution.

NEED MORE HELP?

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