



Funding Institutional User Manual

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1. Introduction

1.1. About Funding Institutional

Funding Institutional is a single-source workflow tool containing funder, funding opportunity, and awarded grants data, helping institutional staff with:

- Insight in key funding trends
- Discovery of relevant opportunities
- Decisions on resource allocation

Funding Institutional is developed for institutional staff who analyze the funding landscape and manage the search and selection process and supports institutional staff across the workflow.

Get insight into the funding landscape

Attain an in-depth understanding of the funding landscape using Funding Institutional overviews. Country level overviews show funded research and future funding opportunities, while research area overviews highlight research areas attracting funding. Get insight into past records of success by looking at overviews detailing fund recipients, and past funds won by your peers and competitors.

Identify funding opportunities

Search for funding opportunities by research area, keywords, or researcher profiles. You can track opportunities by adding bookmarks and saving favorites. Time-saving features allow you to review, save, and re-use your search histories, and notifications alert you to new funding opportunities.

Select funding opportunities

Assess your eligibility to apply for funds by reviewing past successes for your institution. Funding Institutional will look at awarded grant history and identify funders who previously awarded grants to your institution.

Disseminate opportunities

Disseminate opportunities to eligible researchers in your institution using publication history and past success rates with the funder. Funding Institutional will limit applications to the number most likely to succeed and allows you to control your communications by:

- setting automatic notifications,
- enriching communications by manually adding information, and
- sharing communications through a variety of channels.

Build teams

Funding Institutional helps identify potential collaborators in your institution by looking at publication history and past success in winning grants with the selected funder.

Track, report, and manage

Use Funding Institutional to track and report your activities as you move through the funding process. You can export intelligence to help with

funding landscape analysis, download metrics, track activities around funding opportunities, and create reports to monitor shared alerts and recommendations.

1.2. Browser requirements

We support the latest versions of Mozilla® Firefox® and Google Chrome™ on Microsoft Windows and Mac OS X and latest version of Safari on MAC OS X. Also, we have support for Internet Explorer version 10 and higher.

- Other operating systems and browsers may also be able to access Elsevier products; however, the [Elsevier E-Helpdesk](#) cannot provide expert advice or technical support to solve problems you may encounter when using these systems.
- Beta or test versions of browsers are not supported.

2. Getting started

To get started with Funding Institutional, go to www.fundinginstitutional.com.

- In order to use Funding Institutional, you must first create an Elsevier account by registering. Once registered, you may then log into funding Institutional.
- If you already have an Elsevier account with another product, such as Scopus, you may use the same login credentials to log into Funding Institutional.

2.1. Creating a new Elsevier account

Registering with Funding Institutional is a quick, one-time activity which enables your use of the tool. You can later view or edit the information you enter on the Registration form by clicking **Personal details**.

NOTE You will only be able to register if your institution has access to Funding Institutional and you are connecting from your institution's IP address. If your institution is not yet part of Funding Institutional, you can only gain access to the portal once they acquire a license.

Registration is quick and free, and allows you to save searches and to create and manage email alerts regarding new funding opportunities.

* Required fields

* Title

* First name

* Last name

* Email address This will also be your username

* Password [Guidelines](#)

* Confirm password

* I have read and understood the [Registered user agreement](#) and agree to be bound by all of its terms.

* I wish to receive information from Elsevier B.V. and its affiliates concerning their products and services.

Create account >

Registering with Funding Institutional

From the Funding Institutional Home page, click **Register now**. The Funding Institutional Registration page opens.

1. Enter your personal details, email address, and password. Your password must:
 - Be between 5-20 characters long
 - Contain at least 1 uppercase character, e.g., A, B C, etc
 - Contain at least 1 lowercase characters, e.g., a, b, c, etc.
 - Contains at least 1 numeric character, e.g. 0, 1, 2, 3, etc.) OR special character such as ~ ! @ # \$ % ^ & * _ + { } | : " < > ? ` - = [] \ ; ' , . /
2. Click the checkbox for “I have read and understood the Registered User Agreement” (mandatory).
Note To proceed with creating a new account, you must first read and accept the terms and conditions.
3. Click the checkbox if you would like to receive emails about future updates, releases, or related products (optional).
4. Click **Create account**.

After completing these steps, you will receive an email confirming your registration.

2.2. Logging in to Funding Institutional

In order to log into Funding Institutional, you need to:

- Have created an Elsevier account.
- Be inside the access range of your IP or institution.

Log in via your institution

When you open Funding Institutional, you will be immediately prompted to either sign in, or register.

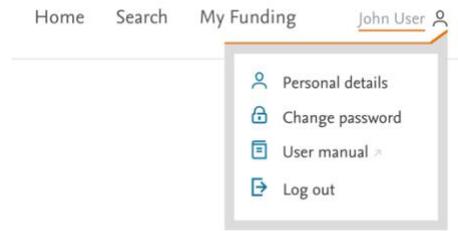
1. Enter your email address. Your account information is stored based upon the email address you used for registration.
2. Enter your password.
3. Click **Sign in**.

Retrieving your username and password

If you do not remember your username or password, click **Forgot your username or password?** Funding Institutional prompts you to enter your email address. Upon entering your email address, you will receive an email with a link to reset your password.

2.3. Change password

If you would like to change your password, click your username at the top right of Funding Institutional.



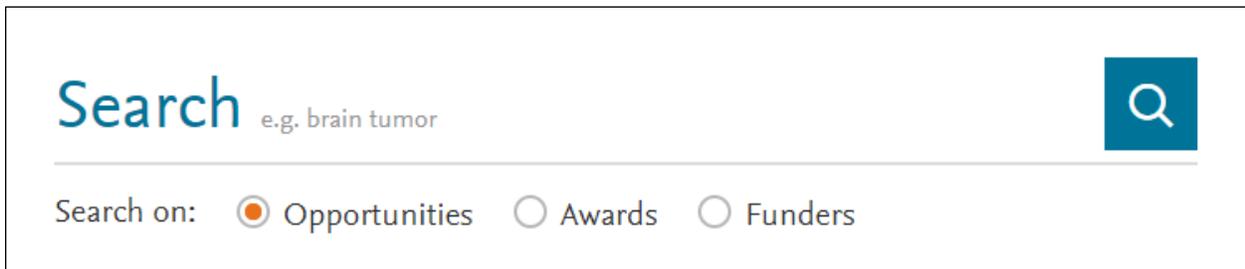
1. Click Change password. The Change Password page opens.
2. Enter your current password and then enter your new password twice, confirming they are the same.
3. Click **Submit** to save your new password.

3. Search for Opportunities

After logging into your account, you will be redirected to the Funding Institutional Home page where you can begin searching for Funding Opportunities, Awarded Grants (Awards), or Funders.

3.1. Opportunities quick search

To conduct an Opportunities quick search, enter terms within a search field and click **Search**. A list of results will open once the search is completed.



Search e.g. brain tumor

Search on: Opportunities Awards Funders

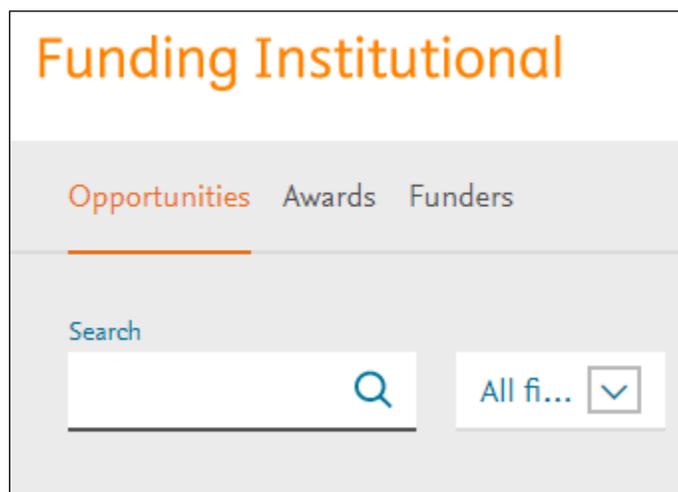
Note Searching by keywords is optional; you can leave this field empty and search for all available content.

3.2. Advanced Opportunities search

Funding Institutional provides you with a more advanced search based on terms you enter relating to funding opportunities.

1. From the Funding Institutional home page, click **Search** at the top navigation bar. The opportunities search page opens with an initial list of opportunities.
2. In the Search field, enter your search term.

As you enter your search term, Funding Institutional refines your list of opportunity results.



Funding Institutional

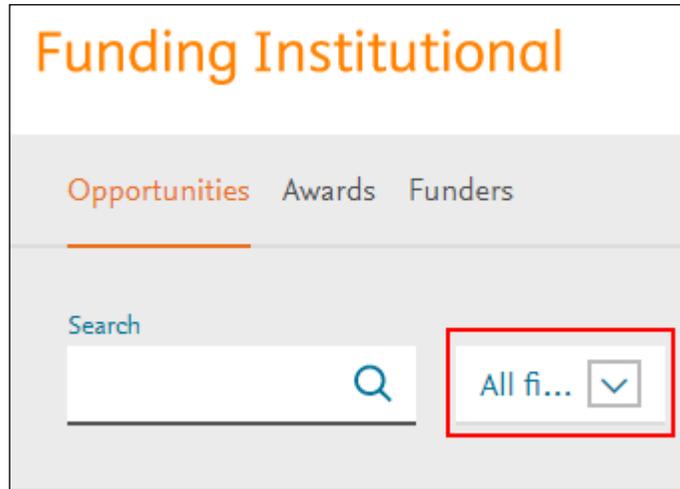
Opportunities Awards Funders

Search

All fi... ▾

Refine your search

You may refine your search by selecting an option from the **All fields** drop-down menu.



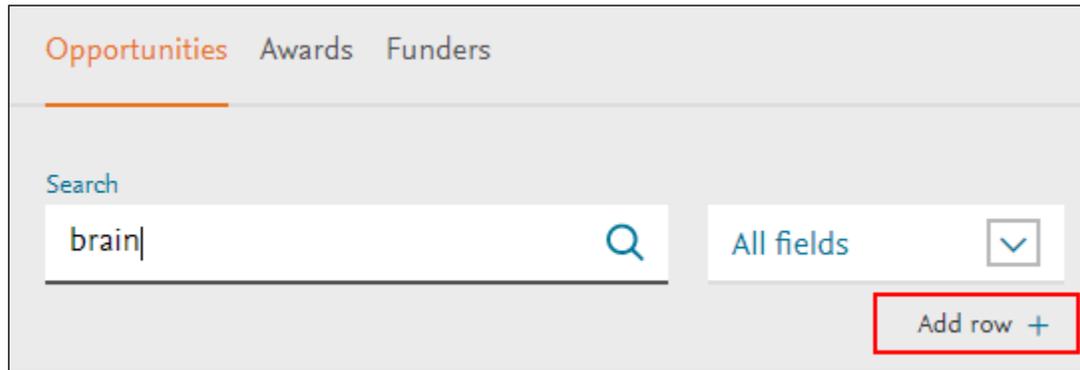
Available menu items are:

Field	Definition
All fields	Searches through all details of opportunities.
Title	Searches only in the titles of opportunities
Abstract	Searches only in the abstracts of opportunities
Opportunity number	Searches only external IDs of opportunities. An external ID is one assigned to an opportunity by the funding body.
Funder	Searches only opportunities with this funder name

Adding search terms

You may add more search terms by adding additional keyword entry rows. You can select various fields for each row while setting up your search.

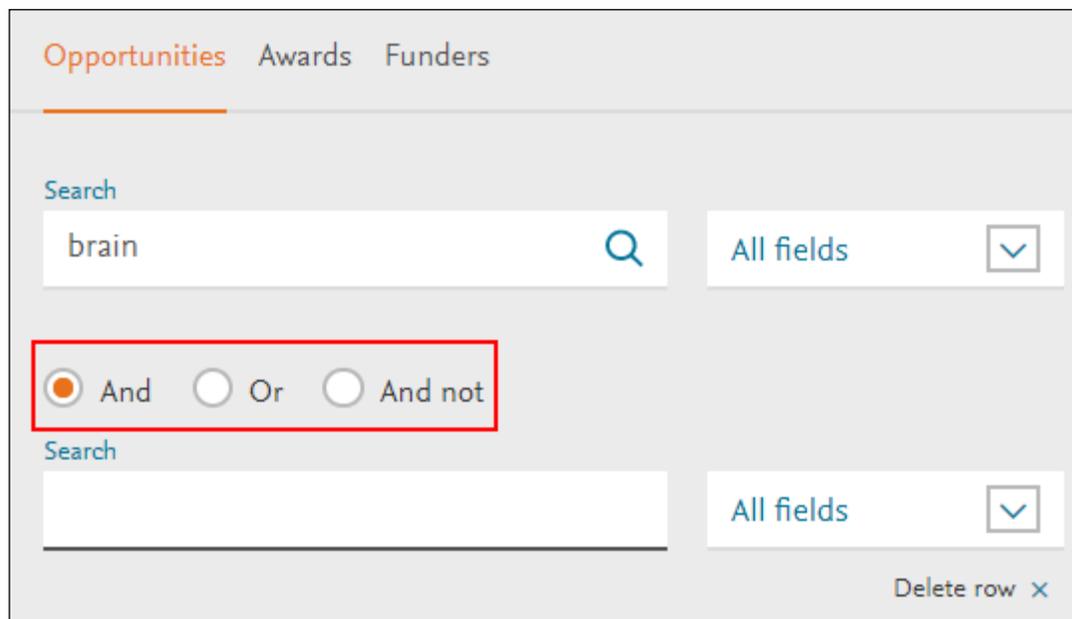
For example, you may use one search field to search titles, and another to search abstracts.



The screenshot shows a search interface with three tabs: 'Opportunities' (selected), 'Awards', and 'Funders'. Below the tabs is a search bar containing the text 'brain' and a magnifying glass icon. To the right of the search bar is a dropdown menu labeled 'All fields' with a downward arrow. Below the search bar and dropdown menu is a red-bordered box containing the text 'Add row +' with a plus sign.

Using Boolean operators with your search

While adding additional search rows, you have the option to use Boolean operators, And, Or, And not, with your search.



The screenshot shows a search interface with three tabs: 'Opportunities' (selected), 'Awards', and 'Funders'. Below the tabs is a search bar containing the text 'brain' and a magnifying glass icon. To the right of the search bar is a dropdown menu labeled 'All fields' with a downward arrow. Below the search bar and dropdown menu is a red-bordered box containing three radio buttons labeled 'And', 'Or', and 'And not', with 'And' selected. Below the red-bordered box is another search bar, which is empty, and a dropdown menu labeled 'All fields' with a downward arrow. At the bottom right of the search interface is a 'Delete row x' button.

Search tips

- The Boolean operator AND narrows your search so you will see fewer funding opportunities, while OR broadens your search, resulting in more listed opportunities.

- 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 *stem* and *cell* throughout the document and not necessarily together.

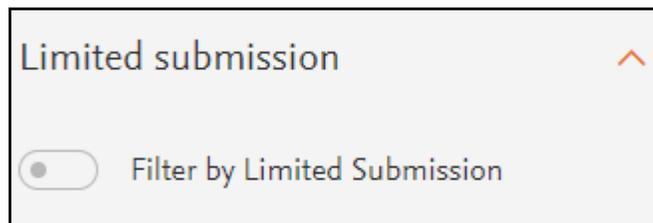
3.3. Limited submission

Use the Limited submission filter to narrow your search to show only opportunities with a limited submission.

A limited submission is a restriction set by funders on the number of applications that may be submitted by an institution in response to a given opportunity. In such cases, institutions may decide to open an internal procedure to select the final applications that may be submitted.

3.3.1. Filter by Limited submission

1. Click **Limited submission** to open the filter setting.
2. Select to filter your results list by opportunities that are considered limited submissions. Your results list will update based upon your selection.



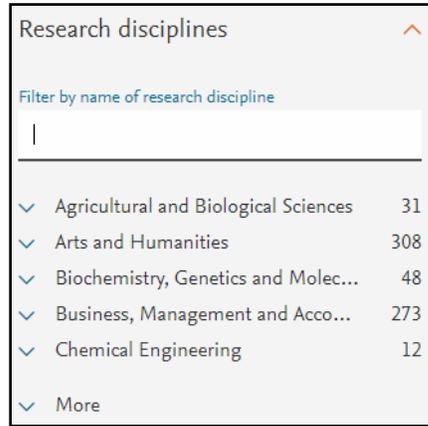
3.4. Browse Research disciplines

Research discipline browsing is available in Funding Institutional and is based on ASJC classification. ASJC codes are assigned to funding opportunities in order to define areas of interest and narrowing the scope of interest for search using Funding International. The complete list of ASJC codes may be found in the Appendix of this document.

3.4.1. Browse by Research disciplines

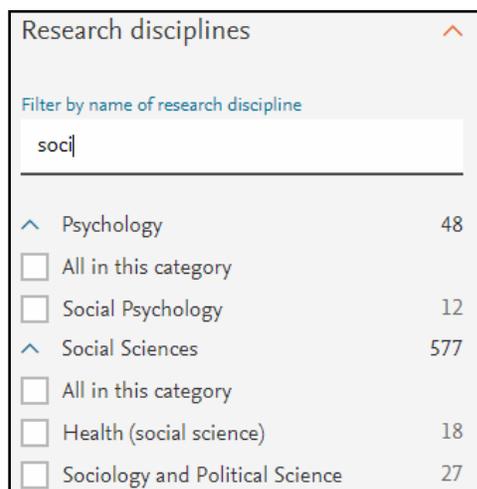
1. Click **Research disciplines** to browse Research disciplines available on Funding Institutional. Research disciplines expands.
2. Click on a Research discipline to view available sub-categories, if necessary.

3. Click **More** to view more Research disciplines, if necessary.
 4. Select a sub-category Research discipline of interest.
- Your results list will update based upon your selection.



Keyword browse of Research disciplines

1. Click **Research disciplines** to open the list of available Research disciplines available on Funding Institutional. Research disciplines expands.
2. In Filter by name of research discipline, enter a search term into the field. The Research disciplines listing updates as you type the keyword.
3. You can either select a sub-category indicating the research discipline of interest or you can select all sub-categories. Your results list will update based upon your selection.



3.5. Browse Funding types

Funding Institutional distinguishes Funding types based upon types of research available for Funding opportunities.

3.4.1. Browse by Funding types

1. Click **Funding types** to browse different types of funding opportunities available on Funding Institutional. Funding types expands.
2. Click **More** to view more Funding types, if necessary.
3. Click one or more Funding types.

Your results list will update based upon your selection.

The numbers next to each Funding type indicate how many opportunities there are currently available.

Funding type ^

- Contract, tender or cooperative agreement 23
- Fellowships, scholarships or trainings 69
- Prizes 24
- Programs and projects 11
- Research and publications 120
- Travel and Conferences 9

Available Funding Types in Funding Institutional

Funding type	Definition
Travel and Conferences	The Travel and Conferences Fundings serve to fund the development and hosting of or travel to a scientific conference. Travel Fundings assist the awardee with transportation and accommodation while attending scientific group meetings.
Equipment and facilities	This mechanism is designed to purchase, maintain or upgrade research equipment or lab facilities.
Artistic pursuit	The Artistic Pursuit Fundings are awarded to those who incorporate arts and/or culture into their projects and thus promote the development of culture and an individual's development through culture.
Prizes	Prizes can be both monetary and non-monetary. Non-monetary prizes are symbolic means to communicate that contributions are valued and appreciated.
Contract, tender, or cooperative agreement	In order to receive this Funding, it is necessary to indicate a substantial federal scientific or programmatic involvement.

	Substantial involvement means that after receiving an award, the scientific or program staff will assist, guide, coordinate, or participate in project activities.
Research and publications	This award supports discrete, specified, researcher-initiated projects to be performed by named investigators in areas representing their specific interest and competency. Publications, such as scientific articles or academic theses are also included in this category.
Fellowships, scholarships, or training	Fellowship and Scholarships awards are designed to commence or develop the scientific education of the awardee. Training awards are to support the research training of scientists for career development, as well as help professional schools establish, expand, or improve programs of continuing education.
Programs and projects	These awards are designed to support a broadly based, multidisciplinary, often long-term research program which has a specific objective or basic theme. A program project/center-gran award involves the organized efforts of relatively large groups, members of which are conducting research projects designed to elucidate the various aspects or components of an objective.

3.5. Browse Citizenship

Funding Institutional provides a means to search for opportunities based upon a researcher's citizenship. In some cases, citizenship within a Funding awarding country is necessary.

You can add multiple countries as you search.

3.5.1. Browse by Citizenship

1. Click **Citizenship** to open a text entry field to search for a country.
2. Type in a country name. The Citizenship module autocompletes with a list of countries meeting your entered search term.
3. For each listed country of interest, select **Add** to include the country in your search.
4. If necessary, repeat steps 2 and 3

Your results list will update based upon your text entry.

Citizenship ^

Enter your country of citizenship

ar

United Arab Emirates

Armenia

Aruba Add

Argentina

3.6. Browse Funder type

Use the Funder type tool to select opportunities from one or more types of funders.

The Funders type refers to the funder’s main purpose of operation and reflects the main activities which the funder engages.

3.6.1. Browse by Funder type

1. Click **Funder type** to open a list of types available on Funding Institutional.
 2. Select one or more check box(es) next to a type to use within your search.
- Your results list will update based upon your selection.

Funder type ^

<input type="checkbox"/>	Governmental Organizations	504
<input type="checkbox"/>	Business and Industry	17
<input type="checkbox"/>	Foundations	217
<input type="checkbox"/>	Nonprofit Organizations and Charities	119
<input type="checkbox"/>	International Organizations	42
<input checked="" type="checkbox"/>	More	

3.6.2. Available Funder types in Funding Institutional

Funder type	Definition
Governmental Organizations	Government institution that operates at a national level or governmental institution that operates at sub-national level, meaning at the level of a federal state, province, country region or city.
Business and Industry	A profit-undertaking company, business, or industry engaged in entrepreneurial, economic, and commercial operation at a national or international level.
Foundations	<p>A nonprofit nongovernmental organization that provides funds and other types of support to other organizations, individuals or for own charitable purposes.</p> <p>Private foundations derive its financial resources from a family, an individual, or a corporation. In the United States, private foundations must disclose all grantees and Funding amounts in its IRS Form 990-PF.</p> <p>Public foundations derive funds from public sources, receive Fundings from individuals, governments and private foundations. In the United States, a Funding making public foundation or charity isn't subject to this disclosure requirement, so access to its funding data will depend on how much the funder is willing to share with the public.</p>
Nonprofit Organizations and Charities	Nonprofit nongovernmental organizations (also called non-business entity) that do not fall under any of the categories above.
International Organizations	An organization with international membership. These include both governmental organizations and non-governmental, nonprofit organizations that operate internationally.
Professional Associations and Societies	A professional association whose objective is to promote academic discipline, advance a particular profession, or advance the interests of individuals in a profession
Academic Institutions	An institution whose main activity consists of providing education, conducting research, and granting degrees. These include both public and private education establishments.

3.7. Browse Applicant types

Funding Institutional provides a means to locate opportunities based academic or personal circumstances influencing the eligibility of your application. Some opportunities target individuals with certain academic background, while some opportunities target specific groups of individuals who might be perceived as disadvantaged.

3.7.1. Browse by Applicant types

1. Click **Applicant types** to open a list of available applicant types.
2. For each listed Applicant type of interest, select the check box to include the applicant type in your search.

Your results list will update based upon your selection.

Applicant types ^

<input type="checkbox"/> Mid-Career and Experienced Researchers	323
<input type="checkbox"/> Graduate Students	223
<input type="checkbox"/> Academic Institutions	169
<input type="checkbox"/> Non-profit Organizations	166
<input type="checkbox"/> Local or State Governments	134
<input type="checkbox"/> Small and Medium Businesses	101
<input type="checkbox"/> Commercial Organizations	99
<input type="checkbox"/> Early Career and New Faculty Researchers	77
<input type="checkbox"/> Undergraduate Students	52
<input type="checkbox"/> Minorities	19
<input type="checkbox"/> Women Only	16
<input type="checkbox"/> Persons with Disabilities	4

Available Applicant types in Funding Institutional

Applicant type	Definition
Academic Institutions	An institution whose main activity consists of providing education, conducting research, and granting degrees. These include both public and private education establishments.
Commercial Organizations	Opportunities where commercial organizations are eligible to apply. These are for profit organizations (other than small business) and can be referred to as industry or companies.

Early Career and New Faculty Researchers	Denotes experience and encompasses professionals considered inexperienced or as emerging in their field. These opportunities include postdoctoral awards, new, young, emerging, and early career investigator awards, or junior faculty awards. The requirement is used across all disciplines. For example, an emerging artist award will be classified as “new Faculty/New Investigator.
Graduate Students	Anyone currently in graduate school working towards a master’s degree or a doctorate, but who has not yet received a doctorate. This type is also relevant for undergraduate students looking for funding opportunities for their future graduate studies.
Local or State Governments	Opportunities where local or state governments are eligible to apply.
Non-profit Organizations	Opportunities that non-profit organizations are eligible to apply. Non-profit organizations can also be referred to as charities or NGO’s.
Mid-Career and Experienced Researchers	Anyone who already owns a Ph.D., is an experienced researcher, or anyone who is considered professional in his or her field. E.g. artists, architects, lawyers, journalists, nurses, librarians, medical doctors.
Minorities	Opportunities for which ONLY minorities may apply. This includes minority institutions, or minority owned businesses. For U.S. sponsors, a minority is defined in terms of U.S. government guidelines or standards. Likewise, non-U.S. sponsors follow their countries’ national guidelines or standards when defining the term minority.
Persons with Disabilities	Opportunities for which ONLY disabled individuals may apply, or where disabled persons have a preference in the application process.
Small and Medium Businesses	Opportunities where small businesses (SME) are eligible to apply.
Undergraduate Students	Anyone currently in school working towards a bachelor’s degree.
Women Only	Opportunities for which ONLY women may apply, or where women have a preference in the application process.

3.8. Search for a Funder country

Use the Funder country tool to search for opportunities offered by a specific country.

3.8.1. Entering an Funder country

1. Click **Funder country** to open the search entry field.
 2. Enter a search term within the entry field. As soon as you start entering a term, Funding Institutional lists funding countries based upon your text entry.
 3. Select a funding country from the list based upon your term entry. The country's name displays as selected.
 4. Repeat steps 2 and 3 to add additional funding countries to your search.
- Your results list will update according to your selections.



3.9. Browse Application Deadline

Funding Institutional provides a means to search for opportunities based on the deadline for submitting an application. The Application Deadline filter considered only the closest, upcoming deadline based upon your selection.

Funding Institutional provides only the deadline date itself, so if you are concerned about the specifics of the deadline, be sure to review the full description of the opportunity itself to determine the actual type of deadline for the opportunity. Generally, there are two types of deadlines:

LOI deadline Whether an opportunity has an LOI deadline depends upon the agency's requirements. Some agencies do not use LOI's for their projects.

***Note:** Funding Institutional excludes LOI deadlines in the search and only operates with application deadlines.*

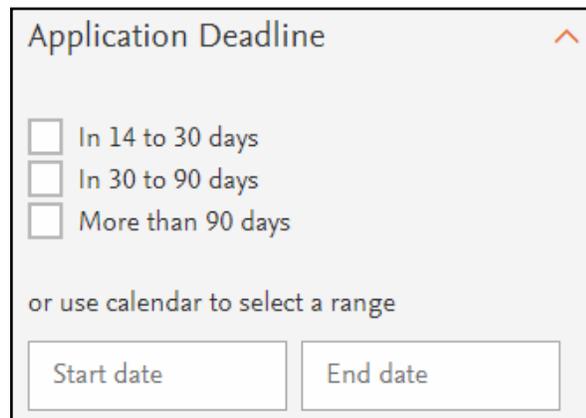
Application deadline This is the actual application deadline, or date for submitting an application. There might be several application deadlines. For example, if an opportunity is recurring.

***Note:** Opportunities with "Deadline not specified" are opportunities that are usually recurring, continuing, or open until filled. Review the full description of the opportunity, or go to the full announcement to find more information about the opportunity's upcoming deadline.*

3.9.1. Browse by Application Deadline

1. Click **Application Deadline** to open the filter.
2. Select one or more suggested date indicators. If you select this option, the interacting calendar will be disabled.
3. Enter a Start date and an End date for the application deadline. This option is not available if you select one of the suggested date indicators.

Your results list will update according to your selections.



The screenshot shows a dialog box titled "Application Deadline" with a close button (red triangle) in the top right corner. Inside the dialog, there are three unchecked checkboxes with the following labels: "In 14 to 30 days", "In 30 to 90 days", and "More than 90 days". Below these checkboxes is the text "or use calendar to select a range". At the bottom of the dialog, there are two input fields: "Start date" and "End date".

3.10. Browse Amount

Use the Amount filter to enter the Minimum and Maximum amount of an opportunity award.

3.10.1. Entering an amount

1. Click **Amount** to open the filter.
2. In **Minimum amount in USD**, enter the minimum amount of an opportunity award in US dollars.
3. In **Maximum amount in USD**, enter the maximum amount of an opportunity award in US dollars.

Your results list updates opportunities based upon the Minimum and Maximum US dollar entries.

Amount

Minimum amount in USD

Maximum amount in USD

3.11. Search for an Opportunity Funder

Use the Funder tool to search for opportunities offered by a specific funder.

3.11.1. Entering a Funder name

1. Click **Funder** to open the search entry field.
2. Enter a search term within the entry field. As soon as you start entering a term, Funding Institutional lists funders based upon your text entry.
3. Select a funder from the list based upon your term entry. The funder's name displays as selected.
4. Repeat steps 2 and 3 to add additional funders to your search.

Your results list updates opportunities based upon your funder selections.

Funder

Enter your preferred funder

marc

March of Dimes Foundation (0) **Add**

March of Dimes Canada (0)

James S. McDonnell Foundation (0)

4. Search for Awards

Funding Institutional provides the option to view awards which were previously granted. Considering the awards might help you identify opportunities relevant to your research.

For example, you may view all awards granted to your institution in the past and decide whether your current project has an opportunity similar to previous awards.

4.1. Awards quick search

Funding Institutional provides you with a keyword search based on terms you enter relating to previously granted awards.

To conduct a keyword search, enter terms within a search field and click **Search**. A list of results will open once the search is completed.



Search

Search on: Opportunities Awards Funders

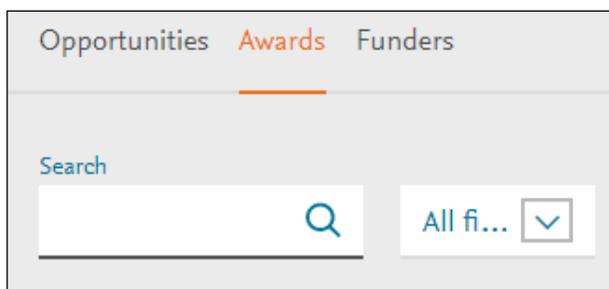
Note: Searching by keywords is optional; you can leave this field empty and search for all available content.

4.2. Awards Advanced search

Funding Institutional provides you with a more advanced search based on terms you enter relating to the awards.

1. From the Funding Institutional home page, click **Search** on the top navigation bar and make sure Awards is selected. The Funding Institutional Start your search page opens with an initial list of available awards.
2. In the Search field, enter your search term.

As you enter your search term, Funding Institutional refines your list of awards results.



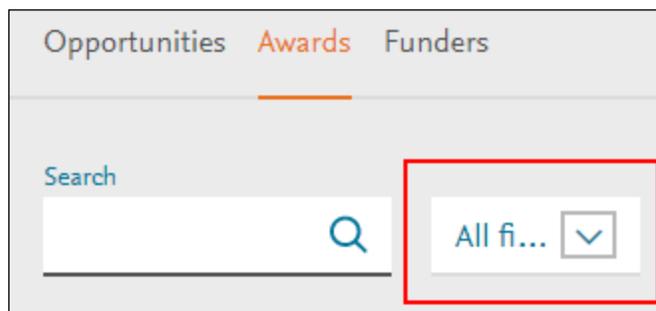
Opportunities Awards Funders

Search

All fi... ▾

Refine your search

You may refine your search by selecting an option from the **All fields** drop-down menu.



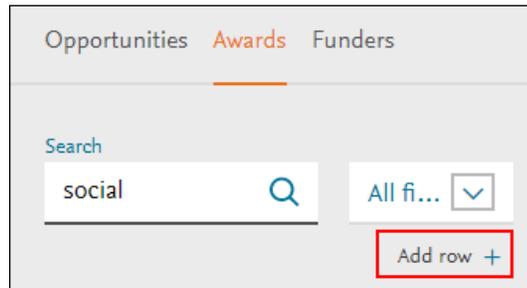
Available menu items are:

Field	Definition
All fields	Searches through all details of awards.
Title	Searches only in the titles of awards.
Abstract	Searches only in the abstracts of awards.
Awardee	Searches only in the awarded researchers of awards.
Awarded institution	Searches only in the awarded institutions of awards. Awarded institutions are institutions that received an award, or the institution where an awarded researcher was affiliated to.
Grant ID	Searches only external IDs of awards. An external ID is one assigned to an opportunity by the funding body.
Funder	Searches only awards with this funder name

Adding search terms

You may add more search terms by adding additional keyword entry rows. You can select various fields for each row while setting up your search.

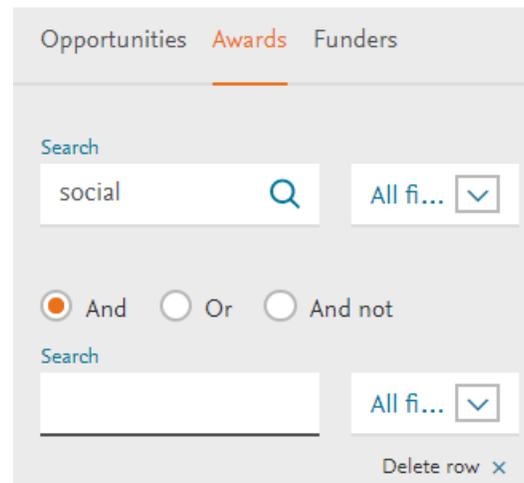
For example, you may use one search field to search titles, and another to search abstracts.



The screenshot shows a search interface with three tabs: 'Opportunities', 'Awards', and 'Funders'. The 'Awards' tab is selected. Below the tabs is a search bar containing the text 'social' and a magnifying glass icon. To the right of the search bar is a dropdown menu labeled 'All fi...' with a downward arrow. Below the search bar and dropdown menu is a red-bordered button labeled 'Add row +'.

Using Boolean operators with your search

While adding additional search rows, you have the option to use Boolean operators, And, Or, And not, with your search.



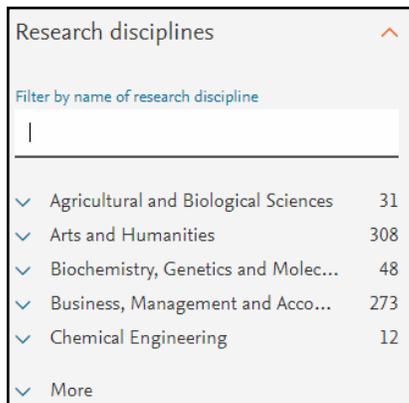
The screenshot shows the same search interface as above, but with Boolean operator options. Below the first search bar, there are three radio buttons: 'And' (selected), 'Or', and 'And not'. Below these options is a second search bar, which is currently empty. To the right of the second search bar is another dropdown menu labeled 'All fi...' with a downward arrow. Below the second search bar and dropdown menu is a button labeled 'Delete row x'.

4.3. Browse Research disciplines

Research discipline browsing is available in Funding Institutional and is based on ASJC classification. ASJC codes are assigned to awards in order to define areas of interest and narrowing the scope of interest for search using Funding International. The complete list of ASJC codes may be found in the Appendix of this document.

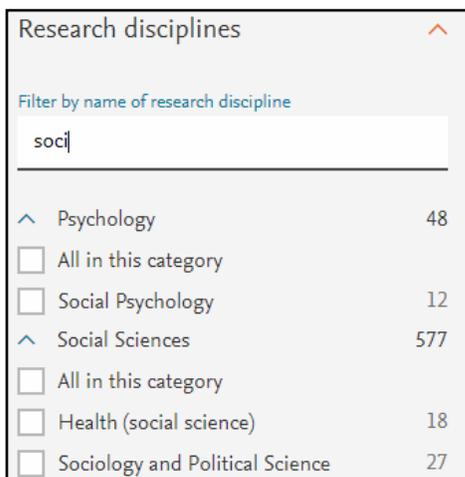
4.3.1. Browse by Research disciplines

1. Click **Research disciplines** to browse Research areas available on Funding Institutional. Research disciplines expands.
2. Click on a Research discipline to view available sub-categories, if necessary.
3. Click **More** to view more Research disciplines, if necessary.
4. You can either select a sub-category indicating the research discipline of interest or you can select all sub-categories. Your results list will update based upon your selection.



Keyword browse of Research disciplines

1. Click **Research disciplines** to open the list of available Research disciplines available on Funding Institutional. Research disciplines expands.
2. In Filter by name of research discipline, enter a search term into the field. The Research discipline listing updates as you type the keyword.
3. You can either select a sub-category indicating the research discipline of interest or you can select all sub-categories. Your results list will update based upon your selection.



4.4. Browse Awarded Institution

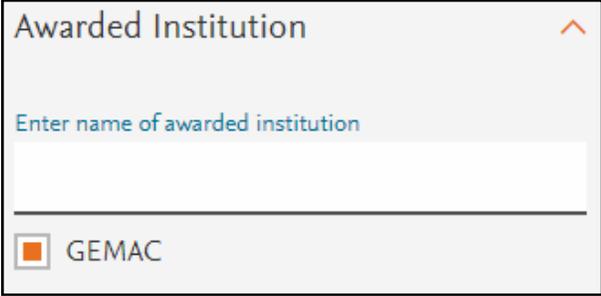
Funding Institutional provides a means to search for Awards based upon an Awarded Institution, or an institution which has received an award.

You can add multiple institutions as you search.

4.4.1. Browse by Awarded Institution

1. Click **Awarded Institution** to open a text entry field to search for an institution.
2. Type in an institution name. The Awarded Institution module autocompletes with a list of institutions meeting your entered search term.
3. For each listed institution, select **Add** to include the institution in your search.
4. If necessary, repeat steps 2 and 3.

Your results list will update based upon your selected items.



4.5. Browse Awarded Researcher

Funding Institutional provides a means to search for Awards based upon an Awarded Researcher, or a researcher who has received an award.

You can add multiple researchers as you search.

4.5.1. Browse by Awarded Researcher

1. Click **Awarded Researcher** to open a text entry field to search for a researcher.
2. Type in a researcher name. The Awarded Researcher module autocompletes with a list of researchers meeting your entered search term.
3. For each listed researcher, select **Add** to include the researcher in your search.
4. If necessary, repeat steps 2 and 3.

Your results list will update based upon your selected items.

Awarded researcher

Enter name of awarded researcher

james

James, James

4.6. Browse Recipient Country

Funding Institutional provides a means to search for Awards based upon a Recipient Country. If the award was received by one or more researchers, then the Recipient Country is the country of the institution the Principal Investigator was affiliated to. If the award was received by an institution, then the Recipient Country is the country of that institution.

You can add multiple recipient countries as you search.

4.6.1. Browse by Recipient Country

1. Click **Recipient Country** to open a text entry field to search for a country.
2. Type in a country name. The Recipient Country module autocompletes with a list of countries meeting your entered search term.
3. For each listed country, select **Add** to include the country in your search.
4. If necessary, repeat steps 2 and 3.

Your results list will update based upon your selected items.

Recipient Country

Enter country

america

American Samoa

4.7. Search for an Award Funder

Use the Funder tool to search for awards offered by a specific funder.

4.7.1. Entering a Funder name

1. Click **Funder** to open the search entry field.
2. Enter a search term within the entry field. As soon as you start entering a term, Funding Institutional lists funders based upon your text entry.
3. Select a funder from the list based upon your term entry. The funder's name displays as selected.
4. Repeat steps 2 and 3 to add additional funders to your search.

Your results list updates opportunities based upon your funder selections.



The screenshot shows a search interface titled "Funder" with a search input field containing the text "marc". Below the input field, a list of search results is displayed:

- March of Dimes Foundation (0)
- March of Dimes Canada (0)
- James S. McDonnell Foundation (0)

4.8. Browse Funder type

Use the Funder type tool to select awards from one or more types of funding.

The Funders type refers to the funder's main purpose of operation and reflects the main activities which the funder engages.

4.8.1. Browse by Funder type

1. Click **Funder type** to open a list of types available on Funding Institutional.
2. Select one or more check box(es) next to a type to use within your search.

Your results list will update based upon your selection.

Funder type		^
<input type="checkbox"/>	Governmental Organizations	504
<input type="checkbox"/>	Business and Industry	17
<input type="checkbox"/>	Foundations	217
<input type="checkbox"/>	Nonprofit Organizations and Charities	119
<input type="checkbox"/>	International Organizations	42
<input checked="" type="checkbox"/>	More	

4.8.2. Available Funder types in Funding Institutional

Funder type	Definition
Governmental Organizations	Government institution that operates at a national level.
Business and Industry	A profit-undertaking company, business, or industry engaged in entrepreneurial, economic, and commercial operation at a national or international level.
Foundations	<p>A nonprofit nongovernmental organization that provides funds and other types of support to other organizations, individuals or for own charitable purposes.</p> <p>Private foundations derive its financial resources from a family, an individual, or a corporation. In the United States, private foundations must disclose all grantees and grant amounts in its IRS Form 990-PF.</p> <p>Public foundations derive funds from public sources, receive Fundings from individuals, governments and private foundations. In the United States, a Funding making public foundation or charity isn't subject to this disclosure requirement, so access to its Funding data will depend on how much the funder is willing to share with the public.</p>
Nonprofit Organizations and Charities	Nonprofit nongovernmental organizations (also called non-business entity) that do not fall under any of the categories above.
International Organizations	An organization with international membership. These include both governmental organizations and non-governmental, nonprofit organizations that operate internationally.

Professional Associations and Societies	A professional association whose objective is to promote academic discipline, advance a particular profession, or advance the interests of individuals in a profession
Academic Institutions	An institution whose main activity consists of providing education, conducting research, and granting degrees. These include both public and private education establishments.

4.9. Browse Funding types

Funding Institutional distinguishes Funding types based upon types of research available for Funding awards.

4.9.1. Browse by Funding types

1. Click **Funding types** to browse different types of funding available on Funding Institutional. Funding types expands.
2. Click **More** to view more Funding types, if necessary.
3. Click one or more Funding types.

Your results list will update based upon your selection.

The numbers next to each Funding type indicate how many awards there are currently available.

Grant type		^
<input type="checkbox"/>	Travel and Conferences	71
<input type="checkbox"/>	Equipment and facilities	7
<input type="checkbox"/>	Artistic pursuit	19
<input type="checkbox"/>	Prizes	121
<input type="checkbox"/>	Contract, tender or cooperative agreement	118
<input checked="" type="checkbox"/>	More	

Available Funding Types in Funding Institutional

Funding type	Definition
Travel and Conferences	The Travel and Conferences Fundings serve to fund the development and hosting of or travel to a scientific conference. Travel Fundings assist the awardee with transportation and accommodation while attending scientific group meetings.
Equipment and facilities	This mechanism is designed to purchase, maintain or upgrade research equipment or lab facilities.
Artistic pursuit	The Artistic Pursuit Fundings are awarded to those who incorporate arts and/or culture into their projects and thus promote the development of culture and an individual's development through culture.
Prizes	Prizes can be both monetary and non-monetary. Non-monetary prizes are symbolic means to communicate that contributions are valued and appreciated.
Contract, tender, or cooperative agreement	In order to receive this Funding, it is necessary to indicate a substantial federal scientific or programmatic involvement. Substantial involvement means that after receiving an award, the scientific or program staff will assist, guide, coordinate, or participate in project activities.
Research and publications	This award supports discrete, specified, researcher-initiated projects to be performed by named investigators in areas representing their specific interest and competency. Publications, such as scientific articles or academic theses are also included in this category.
Fellowships, scholarships, or training	Fellowship and Scholarships awards are designed to commence or develop the scientific education of the awardee. Training awards are to support the research training of scientists for career development, as well as help professional schools establish, expand, or improve programs of continuing education.
Programs and projects	These awards are designed to support a broadly based, multidisciplinary, often long-term research program which has a specific objective or basic theme. A program project/center-gran award involves the organized efforts of relatively large groups, members of which are conducting research projects designed to elucidate the various aspects or components of an objective.

4.10. Browse Amount

Use the Amount filter to enter the Minimum and Maximum amount of an award.

4.10.1. Entering an amount

1. Click **Amount** to open the filter.
2. In **Minimum amount in USD**, enter the minimum amount of an opportunity award in US dollars.
3. In **Maximum amount in USD**, enter the maximum amount of an opportunity award in US dollars.

Your awards results list updates based upon the Minimum and Maximum US dollar entries.



The screenshot shows a filter panel titled "Amount" with an upward arrow icon. It contains two input fields: "Minimum amount in USD" and "Maximum amount in USD".

4.11. Browse Award start year

Funding Institutional provides a means to search for awards based on the year an award will be started or granted for use

4.11.1. Browse by Award start year

1. Click **Award start year** to open the filter.
2. Select one or more start years.

Your results list will update according to your selections.



The screenshot shows a filter panel titled "Award start year" with an upward arrow icon. It contains a list of years from 2009 to 2017, each with a checkbox and a corresponding total award amount.

Year	Total Award Amount
<input type="checkbox"/> 2009	635,729
<input type="checkbox"/> 2010	649,865
<input type="checkbox"/> 2011	594,925
<input type="checkbox"/> 2012	584,161
<input type="checkbox"/> 2013	530,392
<input type="checkbox"/> 2014	515,714
<input type="checkbox"/> 2015	536,999
<input type="checkbox"/> 2016	412,877
<input type="checkbox"/> 2017	80,778

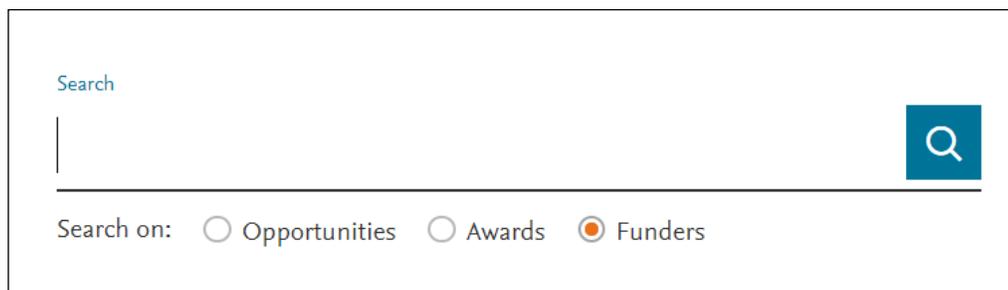
5. Search for Funders

Funding Institutional provides the option to locate and view grant funders.

5.1. Funders quick search

Funding Institutional provides you with a keyword search to locate Funding institutions awarding grants.

To conduct a keyword search, enter terms within a search field and click **Search**. A list of results will open once the search is completed.



The screenshot shows a search interface with a text input field labeled "Search" and a magnifying glass icon. Below the input field, there are three radio buttons for "Search on": "Opportunities", "Awards", and "Funders". The "Funders" radio button is selected.

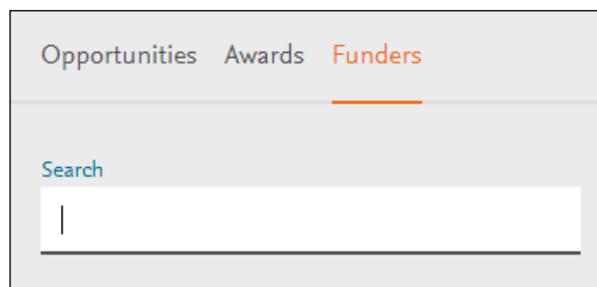
Note Searching by keywords is optional; you can leave this field empty and search for all available content.

5.2. Funders Advanced Search

Funding Institutional provides you with a more advanced search based on terms you enter relating to funders.

1. From the Funding Institutional home page, click **Search** on the top navigation menu, and ensure **Funders** is selected. The Funding Institutional Start your search page opens with an initial list of funding institutions.
2. In the Search field, enter your search term.

As you enter your search term, Funding Institutional refines your list of funding institution results.



The screenshot shows a search interface with three tabs: "Opportunities", "Awards", and "Funders". The "Funders" tab is selected and highlighted with an orange underline. Below the tabs, there is a text input field labeled "Search" with a magnifying glass icon.

5.3. Search for a Funder country

Use the Funder country tool to search for funding institutions from a specific country.

5.3.1. Entering an Funder country

1. Click **Funder country** to open the search entry field.
2. Enter a search term within the entry field. As soon as you start entering a term, Funding Institutional lists funding countries based upon your text entry.
3. Select a funding country from the list based upon your term entry. The country's name displays as selected.
4. Repeat steps 2 and 3 to add additional funding countries to your search.
Your results list will update according to your selections.



The screenshot shows a search interface titled "Funder country" with an upward arrow icon. Below the title is a text input field containing "Br". A dropdown menu is open, displaying a list of suggestions: "British Indian Ocean Territory", "Brazil", "Barbados", and "Brunei Darussalam".

5.4. Browse Funder type

Use the Funder type tool to locate funding institutions from one or more types.

The Funders type refers to the funder's main purpose of operation and reflects the main activities which the funder engages.

5.4.1. Browse by Funder type

1. Click **Funder type** to open a list of types available on Funding Institutional.
2. Select one or more check box(es) next to a type to use within your search.
Your results list will update based upon your selection.

Funder type ^	
<input type="checkbox"/> Governmental Organizations	504
<input type="checkbox"/> Business and Industry	17
<input type="checkbox"/> Foundations	217
<input type="checkbox"/> Nonprofit Organizations and Charities	119
<input type="checkbox"/> International Organizations	42
v More	

5.4.2. Available Funder types in Funding Institutional

Funder type	Definition
Governmental Organizations	Government institution that operates at a national level.
Business and Industry	A profit-undertaking company, business, or industry engaged in entrepreneurial, economic, and commercial operation at a national or international level.
Foundations	<p>A nonprofit nongovernmental organization that provides funds and other types of support to other organizations, individuals or for own charitable purposes.</p> <p>Private foundations derive its financial resources from a family, an individual, or a corporation. In the United States, private foundations must disclose all grantees and grant amounts in its IRS Form 990-PF.</p> <p>Public foundations derive funds from public sources, receive Fundings from individuals, governments and private foundations. In the United States, a Funding making public foundation or charity isn't subject to this disclosure requirement, so access to its Funding data will depend on how much the funder is willing to share with the public.</p>
Nonprofit Organizations and Charities	Nonprofit nongovernmental organizations (also called non-business entity) that do not fall under any of the categories above.
International Organizations	An organization with international membership. These include both governmental organizations and non-governmental, nonprofit organizations that operate internationally.
Professional Associations and Societies	A professional association whose objective is to promote academic discipline, advance a particular profession, or advance the interests of individuals in a profession
Academic Institutions	An institution whose main activity consists of providing education, conducting research, and granting degrees. These include both public and private education establishments.

6. Exporting search results

Funding Institutional provides the option to export funding opportunities, awarded grants or funders and save them as a XLS or CSV file.

6.1. Exporting funding opportunities, awards or funders

You may export opportunities, awards or funders directly from a search results list.

When exporting funding opportunities, the user can choose between XLS and CSV as export formats. The following information is included in your exported file:

- Funding number
- Title
- Opportunity URL
- Description
- Funder
- Funder profile URL
- Amount
- Country
- Deadline
- Hyperlink to source

When exporting awarded Fundings, the following information is included in your file:

- Funding number
- Title
- Awarded grant URL
- Awarded Institution name
- Principal investigator
- Description
- Funder
- Funder profile URL address
- Amount
- Currency
- Start date
- End date

When exporting funders, the following information is included in your file:

- Funder name
- Funder country
- Funder type
- Funder profile URL
- Count of awarded grants from funder
- Count of active opportunities
- Hyperlink to funder opportunities

6.1.1. Exporting awarded opportunities, awards, or funders from a results list

To export items from a search results list, complete the following:

1. From your results list, select one or more list items to email. If you want to select all the opportunities on the page (page limit is 20) or if you want to select all the opportunities that resulted from your search (the upper limit for this selection is 2000) you can use the toggle “Select All” button. From the drop-down next to the toggle button, you can choose whether you want the opportunities on the page or all the related opportunities.
2. From the results list, click **Export as** and choose the export file format between XLS and CSV; XLS is the default export format. Once you click on **Export as XLS** or **Export as CSV**, the selected items from your results list will be available to save as a file.
3. Click **Save**.

Your file of selected items will be saved to your local network or computer.

7. Sharing opportunities

You may share funding opportunities with others by email, sending your contacts a brief summary of opportunities, as well as link to more detailed information.

There are two ways to share opportunities:

- You may share opportunities from a search results list.
- You may also share directly from an opportunity details page.

7.1.1. Sharing opportunities from a search results list

To share funding opportunities from a search results list, complete the following:

1. From your opportunities results list, select one or more items to share; maximum 200 search results can be shared at once. If you want to select all the opportunities on the page (page limit is 20) or if you want to select all the opportunities that resulted from your search (the upper limit for this selection, to be able to share search results, is 200) you can use the toggle “Select All” button. From the drop-down next to the toggle button, you can choose whether you want the opportunities on the page or all the related opportunities.
1. From the results list, click **Share**. The Share opportunities form opens.
Enter one or more email addresses to share the opportunities with; separate multiple email addresses by pressing Enter after each email address has been typed.
Optionally, enter a note for the recipients of the email.
2. Click **Share**.
3. An email message will be sent to the recipient email addresses listed on the Share opportunities form. Each recipient will receive an individual email.

7.1.2. Sharing an opportunity from the details page

To share a funding opportunity from the details page, complete the following:

1. From the results list, click **Share**. The Share opportunities form opens.
Enter one or more email addresses to share the opportunities with; separate multiple email addresses by pressing Enter after each email address has been typed.
Optionally, enter a note for the recipients of the email.
2. 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.

8. Tracking Opportunities

Track relevant funding opportunities to easily find and monitor them for changes or approaching deadlines. You can find your tracked opportunities at any time on **My Funding > Tracked Opportunities**.

8.1. Tracking an opportunity

There are two ways to track an opportunity:

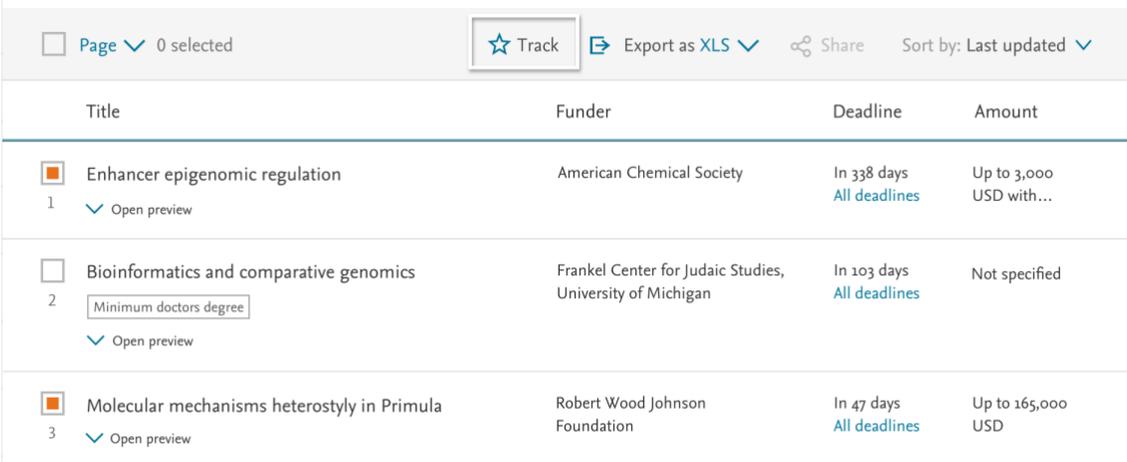
- You may track items from the search results list.
- You may also track it directly from an Opportunity Details page.

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.

8.1.1. Tracking an opportunity from the search results list

To track items from a search results list, complete the following:

1. On your results list, select one or more list items to track. If you want to select all the opportunities on the page (page limit is 20) or if you want to select all the opportunities that resulted from your search (the upper limit for this selection is 2000) you can use the toggle “Select All” button. From the drop-down next to the toggle button, you can choose whether you want the opportunities on the page or all the related opportunities.
2. From the results list, click **Track**.



The screenshot shows a table of search results with a toolbar at the top. The toolbar includes a selection checkbox (unselected), a dropdown menu showing 'Page 0 selected', a 'Track' button with a star icon (highlighted with a red box), an 'Export as XLS' button with a dropdown arrow, a 'Share' button with a network icon, and a 'Sort by: Last updated' dropdown menu. The table has four columns: Title, Funder, Deadline, and Amount. Three rows are visible, each with a selection checkbox and a 'Open preview' link.

	Title	Funder	Deadline	Amount
<input checked="" type="checkbox"/>	Enhancer epigenomic regulation 1 Open preview	American Chemical Society	In 338 days All deadlines	Up to 3,000 USD with...
<input type="checkbox"/>	Bioinformatics and comparative genomics 2 Minimum doctors degree Open preview	Frankel Center for Judaic Studies, University of Michigan	In 103 days All deadlines	Not specified
<input checked="" type="checkbox"/>	Molecular mechanisms heterostyly in Primula 3 Open preview	Robert Wood Johnson Foundation	In 47 days All deadlines	Up to 165,000 USD

3. The **Track Opportunity** form opens and you will be able to do any of the following actions:
 - a. Add an opportunity to the Tracked Opportunities list, without setting up email alerts or assigning the opportunity to groups.

- b. Setting Alerts for a tracked opportunity.
- c. Assigning a tracked opportunity to groups.

8.1.2. Tracking an opportunity from the Opportunity Details page

To track an opportunity from the Opportunity Details page, complete the following:

1. Go to the Opportunity Details page, for the opportunity you want to track
2. From the Opportunity Details page, click **Track**.
3. The **Track Opportunity** form opens and you will be able to do any of the following actions:
 - d. Add an opportunity to the Tracked Opportunities list, without setting up email alerts or assigning the opportunity to groups.
 - e. Setting Alerts for a tracked opportunity.
 - f. Assigning a tracked opportunity to groups.

8.2. Setting Alerts for a tracked opportunity

Setting email alerts for the opportunities you track is optional; if you do not set alerts for a tracked opportunity, then the funding opportunity will be added to the tracked opportunities list, but alerts will be turned off.

Updates ⓘ

Send me opportunity updates

← Set **Updates** for the tracked opportunities and stay up to date with the changes to their content.

Deadline alerts ⓘ

Add alert 4 weeks before ▼ Add alert 1 week before ▼ Add alert ▼

× Remove alert × Remove alert × Remove alert

← Set **Deadline Alerts** for the tracked opportunities and be informed when their upcoming deadlines are getting close.

Groups ⓘ

Assign to group ▼

Cancel **Track**

The following type of email alerts can be set for a tracked opportunity:

1. **Updates** - by setting this type of alert, you will be notified by email when the following metadata of a tracked opportunity is changed:
 - a. Amount
 - b. Limited Submission
 - c. Contact Information

- d. **Status:** reflects if the opportunity is still open for application (in this case the opportunity is considered active) or if the call for application closed (in this case the opportunity is considered inactive)
- 2. **Deadline alerts** - schedule dates and you will be notified by email when a tracked opportunity mandatory letter of intent or application deadline approaches.
If you opt-in to receive a deadline alert, you must schedule at least one date. Up to three deadline alerts may be set for any given tracked opportunity.

8.3. Assigning a tracked opportunity to groups

To assign a tracked opportunity to a group, complete the following:

1. From the **Track opportunity** form, click **Assign to group**.
2. From **Assign to group**, 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.

Updates ⓘ

Send me opportunity updates

Deadline alerts ⓘ

None

× Remove alert

Groups ⓘ

Assign to group

× Biochemistry Genetics

Assign the tracked opportunities to one or more groups to easily manage your list of tracked opportunities.

Cancel

If you choose to not assign a track opportunity to any group, then the tracked opportunity will be automatically categorized as “Not Grouped”.

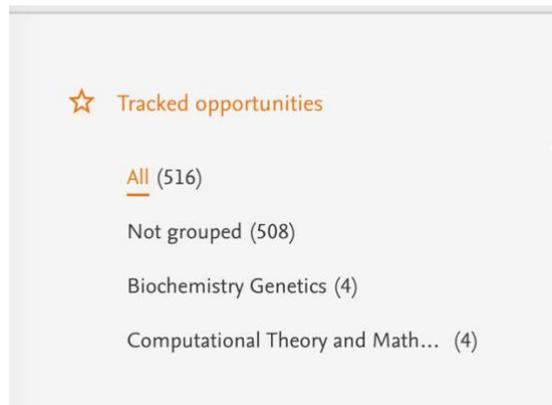
All tracked opportunities, regardless of group, can be found under the “All” list.

If you previously had “Favorite” opportunities, they now can be found on both “All” and “Not Grouped” lists.

8.4. Viewing the tracked opportunities

To view your tracked opportunities, complete the following:

1. From any Funding Institutional page, click **My Funding**. The **My Funding** page opens. The default display is set to open your Saved searches.
2. From the **My Funding** page, click **Tracked opportunities** or one of the group names. The list of tracked opportunities will be opened based on the selected group.
 - “**All**” displays all your tracked opportunities independent from the assigned groups.
 - “**Not grouped**” displays your tracked opportunities which were not assigned to any group.



For each Tracked opportunity, Funding Institutional displays:

- The title of the opportunity
- The name of the funder
- The number of days until the upcoming deadline
- The amount that can be granted to an awardee
- If a tracked opportunity becomes inactive, the opportunity will be visible in the list and it will be marked as “Inactive”

Funding Institutional Home Search My Funding Peter van Straten

My Funding

Saved searches

Tracked opportunities

- All (83)
- Not grouped (66)
- [Biochemistry Genetics \(4\)](#)
- Chemistry (1)
- Computational Theory and Mathematics (12)

Biochemistry Genetics Rename group Delete group

4 tracked opportunities

Page 0 selected Untrack Export as XLS Share Sort by: Last updated

	Title	Funder	Deadline	Amount	Edit tracking
<input type="checkbox"/>	Graduate student grant in sustainable genetics 1 Limited submission Minimum doctors degree Open preview	Southern SARE	In 338 days All deadlines	16,500 USD	Edit tracking
<input type="checkbox"/>	Microgrant program Inactive 2 Limited submission Open preview	State of New Jersey Department of Health	The deadline for applying has passed	2,000,00 USD	Edit tracking
<input type="checkbox"/>	Limited competition: Analysis of data from Alzheimer's Disease sequencing project follow- up study 3 Limited submission Open preview	Northern SARE	In 112 days All deadlines	Not specified	Edit tracking

8.5. Editing a tracked opportunity settings

There are three ways to edit the email alerts settings or the group assignments for a tracked opportunity:

- You may edit the settings of a tracked opportunity from the **My Funding > Tracked Opportunities** page.
- You can do the same directly from an Opportunity Details page.
- Or from the search results list.

8.5.1. Editing the settings of a tracked opportunity from My Funding > Tracked Opportunities page

To edit the settings of a tracked opportunity from the **My Funding > Tracked Opportunities** page, complete the following:

1. From one of the groups in **My Funding > Tracked Opportunities**, click **Edit tracking** button for the related opportunity. The **Edit opportunity tracking** form opens.
2. From **Edit opportunity tracking** form, you can change the settings for the Updates, Deadline alerts and Groups.
3. Click **Save**. The notifications and grouping will work referring to your new settings.

8.5.2. Editing the settings of a tracked opportunity from the Opportunity Details page

To edit the settings of a tracked opportunity from the Opportunity Details page, complete the following:

1. Go to the Opportunity Details page, for the opportunity you are planning to edit the track settings for

2. From Opportunity details page, click the **Edit Tracking**. The **Edit opportunity tracking** form opens.
3. From **Edit opportunity tracking** form, you can change the settings for the Updates, Deadline alerts and Groups.
4. Click **Save**. The notifications and grouping will work referring to your new settings.

8.5.3. Editing the settings of a tracked opportunity from the search results list

To edit the settings of a tracked opportunity from the search results list, follow similar steps as for Tracking an opportunity from the search results list.

If you track again an opportunity that you already tracked before, then the settings will be overwritten.

8.6. Untracking an opportunity

You have the option to no longer follow an opportunity by untracking it. When an opportunity is untracked, then the opportunity will not be monitored for updates or for approaching deadlines and no email alerts will be sent.

There are two ways to untrack an opportunity that you previously tracked:

- You may untrack an opportunity from the **My Funding > Tracked Opportunities** page.
- You may also untrack it directly from an Opportunity Details page.

8.6.1. Untracking an opportunity from the My Funding > Tracked Opportunities page

To untrack an opportunity from the **My Funding > Tracked Opportunities** page, complete the following:

1. From one of the groups in **My Funding > Tracked Opportunities**, select one or more opportunities to untrack.
2. Click **Untrack**. A confirmation message opens.
3. Click **Untrack** in the confirmation form.

The opportunity will no longer be available from the tracked opportunities and it will not be monitored for changes or deadlines.

The screenshot shows the 'My Funding' interface. On the left, there is a sidebar with 'Tracked opportunities' and a list including 'Biochemistry Genetics (4)'. The main area displays a table of 4 tracked opportunities under the 'Biochemistry Genetics' group. The 'Untrack' button is highlighted for the first opportunity.

	Title	Funder	Deadline	Amount	Edit tracking
1	LC-SC3-CC-4-2018: Support to sectorial fora Inactive	Horizon 2020 Framework Programme	The deadline for applying has passed All deadlines	Total funding 8,500,000 EUR	
2	PBT Recognition award in insect physiology, biochemistry and toxicology	Entomological Society of America	in 30 days All deadlines	Up to 1,500 USD	
3	Clinical biochemical genetics fellowship (Minnesota)	Mayo Clinic	in 152 days All deadlines	Up to 76,734 USD	

8.6.2. Untracking an opportunity from the Opportunity Details page

To untrack an opportunity from the Opportunity Details page, do the following:

1. Go to the Opportunity Details page, for the opportunity you are planning to untrack
2. From the Opportunity Details page, click **Untrack**. A confirmation message opens.
3. Click **Untrack**. The opportunity will no longer be available from the tracked opportunities and it will not be monitored for changes or deadlines.

9. Sharing a group

You may choose to share the list of opportunities from a group that you previously created. We will refer to this as “Share a Group”.

By sharing a group, you are sharing the list of opportunities that are assigned to that group.

The screenshot shows the 'My Funding' interface. On the left is a sidebar with 'Tracked opportunities' and a list of groups: 'All (83)', 'Not grouped (66)', 'Biochemistry Genetics (4)', 'Chemistry (1)', and 'Computational Theory and Mathematics (12)'. The main content area is titled 'Biochemistry Genetics' and shows '4 tracked opportunities'. A 'Share the complete list' button is visible. Below this is a table of opportunities with columns for Title, Funder, Deadline, Amount, and Edit tracking. The table contains four rows of opportunities, each with a checkbox, a 'Limited submission' icon, and an 'Open preview' link. The footer shows pagination controls: 'page 1 of 1'.

Title	Funder	Deadline	Amount	Edit tracking
Graduate student grant in sustainable genetics	Southern SARE	In 338 days All deadlines	16,500 USD	
Microgrant program	State of New Jersey Department of Health	In 210 days All deadlines	2,000,00 USD	
Limited competition: Analysis of data from Alzheimer's Disease sequencing project follow-up study	Northern SARE	In 112 days All deadlines	Not specified	
Doctorate Fellowship in Bioinformatics and Genomics	National Institutes of Health	In 20 days All deadlines	7300,000 USD	

To share the list of opportunities from a group, you may choose one of the options:

- you can either copy the Public Share Link. After copying the Public Share Link, you can use that link, by pasting it in your communication.
- or you can share by email, directly from the product. An individual email will be sent to each of the recipients.

To Share a Group, complete the following:

1. From the group details page on **My Funding**, click the **Share the complete list** link next to the group name.
2. The Share opportunities list form opens.
3. If you choose to share by using the Public Share Link, click on **Copy Link** and the link will be copied to clipboard.

After the link is copied to clipboard, you can close the form, by clicking on **Cancel**. You can paste the Public Shared Link in your communication or on a webpage.

4. 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.

Optionally, enter a note for the recipients of the email.

Click **Share**.

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

Share opportunities list

Send a public share link to the complete list of "Diabetes" opportunities. The link allows people to view an updated list of opportunities, while only you can make changes to the group.

Public share link Copy link

<https://www.fundinginstitutional.com/public/groups/1047830>

Email

We will send an email with the public share link to the complete list of "Diabetes" opportunities. 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

Regardless of which method you choose to share the list of opportunities from a group, either copying the Public Share Link or sharing it by email, the institution members will be able to view the shared list, without being required to login. But they have to be inside the IP Network of the institution.

Only the user that created the group is able to add or remove opportunities from the group.

The other users will be able to view the list of opportunities from the shared group; they cannot add or remove opportunities from a shared group, but they can save them to their own Tracked lists or share them with colleagues.

10. Saving your Searches

When searching for opportunities frequently, saving your search is a convenient way to save work and time. Saving a search in Funding Institutional stores your search criteria so that you can easily re-run your search again in the future.

You also have the option to set alerts based on your saved search, which will keep you informed about new opportunities matching your search criteria.

10.1. How to save a search

To save a search, complete the following:

1. Complete an Opportunities search. Your search results list opens.
2. From the results list, click **Save search/set alert**. The Save this search form opens.
3. In Save as, enter a name for your saved search. Funding Institutional automatically proposes a name for your saved search, but you may edit the name as you please.
4. From **Set alerts**, determine whether or not to receive an alert for updates regarding your saved search.

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**.

Your saved search is completed and may be viewed from **My Funding**.

10.1.1. Viewing saved searches

To view a saved search, complete the following:

1. From any Funding Institutional page, click **My Funding**. The **My Funding** page opens. Saved searches is selected as the default display.
2. From your Saved searches, you have the option to do one of the following:

- Review the date the saved search was created.
- Click the name of the saved search to access the results for that search.
- Review the total count of opportunities matching the saved search. Review the count of new opportunities matching the saved search, since the last time the results of that search were accessed.

Click on the results count (total or new) to access the results for the search. The title of new opportunities, since the last time the search results were accessed, will be marked in bold.

- Click the Edit icon to edit your saved search.
- Click the Delete icon to remove the saved search.

10.1.2. Deleting a saved search

To delete a saved search, complete the following:

1. From any Funding Institutional page, click **My Funding**. The **My Funding** page opens. Saved searches is selected as the default display.
2. From your Saved searches, click the Delete icon to remove the saved search. A confirmation message opens.
3. Click **Delete**. The saved search will be removed from Funding Institutional.

10.1.3. Editing a saved search

To update a saved search, complete the following:

1. From any Funding Institutional page, click **My Funding**. The **My Funding** page opens. Saved searches is selected as the default display.
2. From your Saved searches, click the Edit icon to edit your saved search. The Save this search form opens.
3. Do one of the following:
 - Change your alert status in **Set alerts**
 - Change the **Alert frequency**
 - Click **Shareable link** to copy a hyperlink for your personal use
4. Click **Save**. Your saved search is updated.

11. Managing your account

Funding Institutional account information and password may be modified by using the account management feature.

11.1. How to view or edit your Personal details

To view or edit your Personal details, complete the following:

1. From any Funding Institutional page, move your cursor over your user name. The account management pop up displays.
2. From the account management pop up, click **Personal details**. The Personal details page opens.
3. Review your account details, or click Update personal details to edit.
4. If editing your account, update where necessary.
5. Click **Update details**.

Your account details are saved.

11.1.1. Change your Funding Institutional password

Prior to changing your password, please be aware of the following password guidelines:

- Be between 5-20 characters long
- One uppercase alphabetical character, e.g., A, B C, etc.
- One lowercase alphabetical character, e.g., a, b, c, etc.
- One numeric character, e.g. 0, 1, 2, 3, etc.) OR special character such as ~ ! @ # \$ % ^ & * _ + { } | : " < > ? ` - = [] \ ; ' , . / c

To update your password, complete the following:

1. From any Funding Institutional page, move your cursor over your user name. The account management pop up displays.
2. From the account management pop up, click **Change password**. The Change password page opens.
3. Complete the following:
 - Enter your Old password
 - Enter your New password
 - Confirm your new password by entering it again
4. Click **Submit**. Your new password will be saved.