



# FUNDING INSTITUTIONAL USER MANUAL

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# 1. Introduction

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## 1.1 FUNDING INSTITUTIONAL

The purpose of this manual is to guide the users on how to use the Funding Institutional. Funding Institutional is a single-source workflow tool which provides funders, funding opportunities and awarded grants data to institutional staff, helping them to get:

- 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, supporting users across the workflow. This tool offers the possibility to the users to:

### **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, while there are notifications that inform you about 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

**Build teams**

- sharing communications through a variety of channels.

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**

Funding Institutional supports the following browsers:

**Microsoft Windows and Mac OS X (latest versions):**

- Mozilla®
- Firefox®
- Google Chrome™
- Internet Explorer (version 10 and higher).

**MAC OS X:**

- Safari (latest version)

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.

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## 2. Get started

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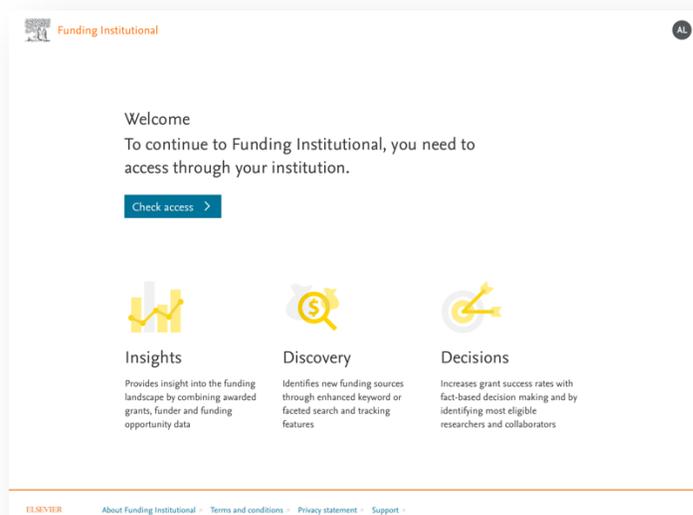
You will only be able to use Funding Institutional if your institution has acquired a license. To get started, go to <https://www.fundinginstitutional.com/>

### 2.1 GET STARTED USING AN EXISTING ELSEVIER ACCOUNT

If you already have an Elsevier account with another product, such as ScienceDirect or Scopus, you may use the same account credentials to sign in to Funding Institutional.

Are you already logged in to other Elsevier products? Then most likely you don't have to do anything. Funding Institutional is immediately available to you.

In some cases, when landing on Funding Institutional as a logged-in user, you might see a page like this:



This is because we could not recognize you as part of your institution. To continue, please click “Check access” and follow the steps.

### 2.2 GET STARTED AS A NEW USER

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If you don't have an Elsevier account which is associated with your institution, the following steps can help you create an account and get started with Funding Institutional.

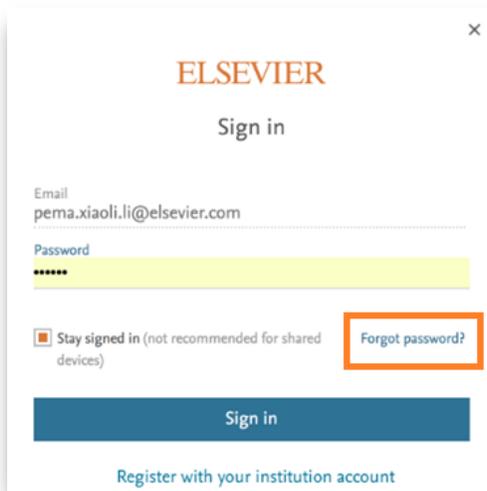
1. Make sure you are connecting from your institution's IP address
2. Go to <https://www.fundinginstitutional.com>
3. Click "Create account", enter the email address and password – This can be seen as your Elsevier account.
4. Follow the steps and you will be able to access Funding Institutional.

### 2.3 SIGN IN TO FUNDING INSTITUTIONAL

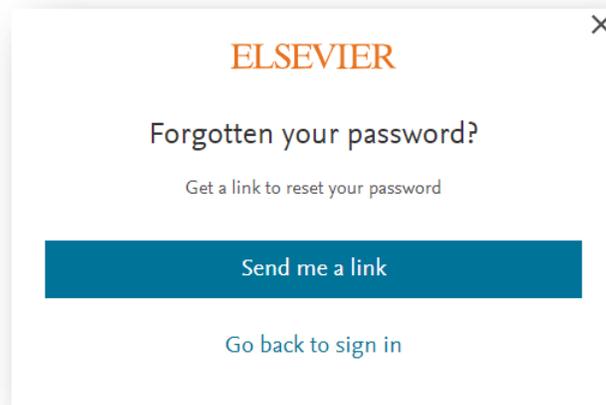
1. Make sure you are connecting from your institution's IP address
2. Go to <https://www.fundinginstitutional.com>
3. Click **Sign in** on the top-right corner of the page
4. Follow the steps and you will be able to use Funding Institutional.

### 2.4 RETRIEVE USERNAME AND PASSWORD

If you do not remember your password, click **Forgot password?** link at the Elsevier Sign In page.



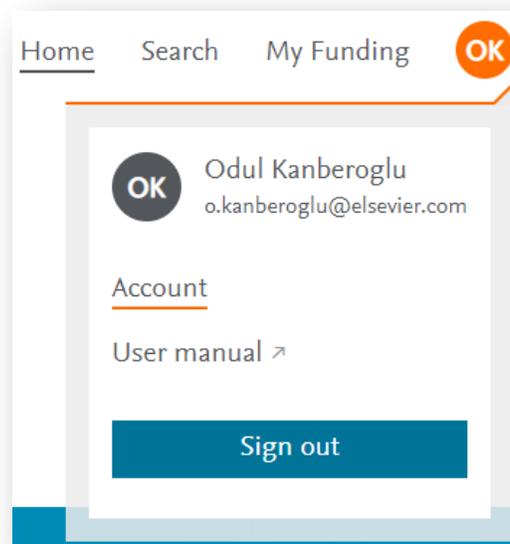
The screenshot displays the Elsevier Sign in interface. At the top, the Elsevier logo is centered above the text "Sign in". Below this, there is an "Email" field containing the address "pema.xiaoli.li@elsevier.com". Underneath is a "Password" field with masked characters. A checkbox labeled "Stay signed in (not recommended for shared devices)" is present, with a "Forgot password?" link highlighted by an orange border to its right. At the bottom of the form is a blue "Sign in" button, and below that is a link that says "Register with your institution account".



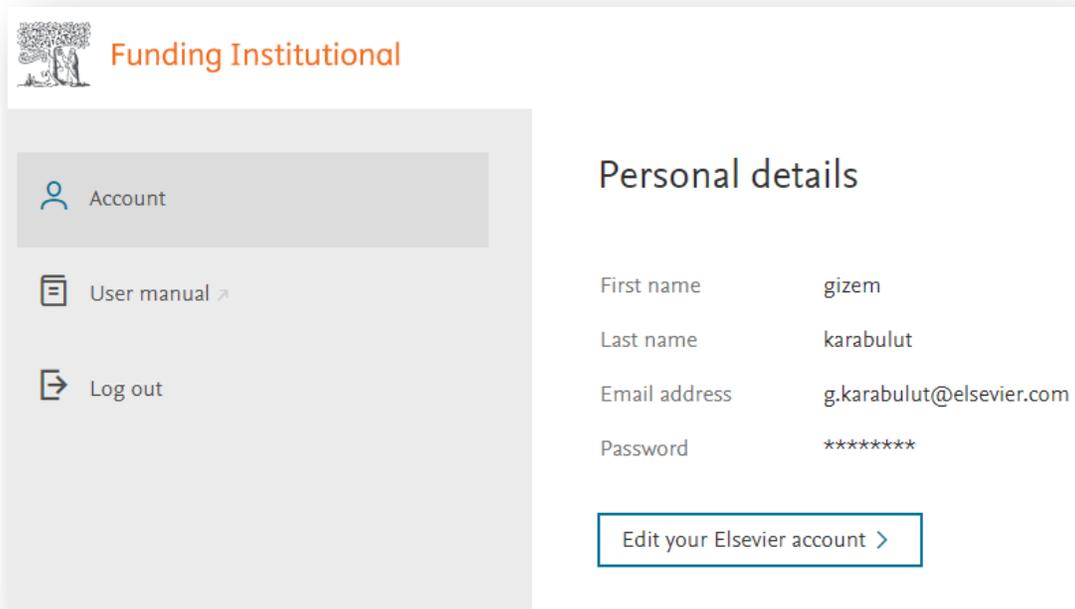
You can reset your password by following the steps in the e-mail.

## 2.5 CHANGE YOUR PASSWORD

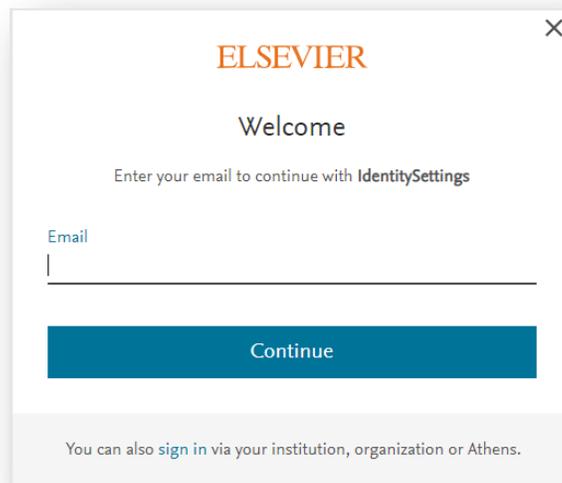
To change your password, click Profile Setting button at the right top corner of the home page.



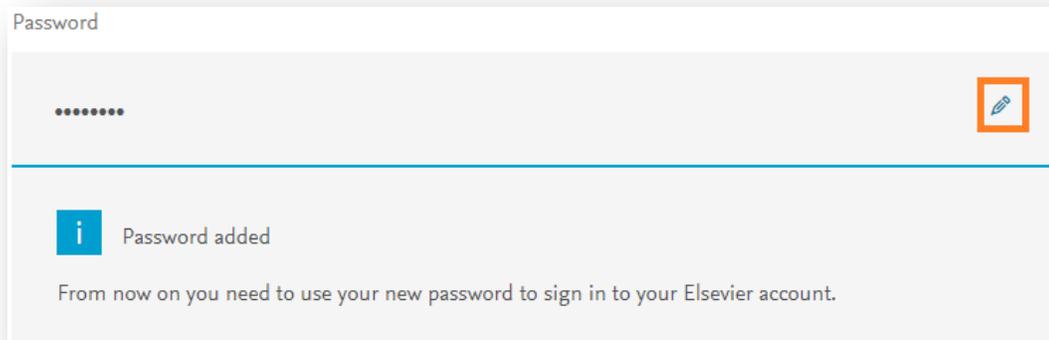
1. Click **Account** menu to reach your personal details section.
2. Click **Edit your Elsevier account** button and you will be directed to Elsevier's central account setting page.



3. Enter your e-mail related to your Elsevier account and click **Continue**.



4. At the Account detail page, click Pencil button to change your password. When you click the button, an automated e-mail will be sent to your e-mail with the password update link.



5. By clicking the link, you can reach the page to set your new password.

## 2.6 VIEW OR EDIT YOUR PERSONAL DETAILS

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

1. From any Funding Institutional page, click the profile settings button and the settings pop up opens.
2. From the pop up click Account and Personal details page opens.
3. Review your account details or click **Edit your Elsevier Account** button.
4. Enter your password and click Sign in. The Elsevier Account setting page opens.
5. You can update your account details from this page or you can go back to Funding Institutional by clicking **Back to Funding Institutional** button.

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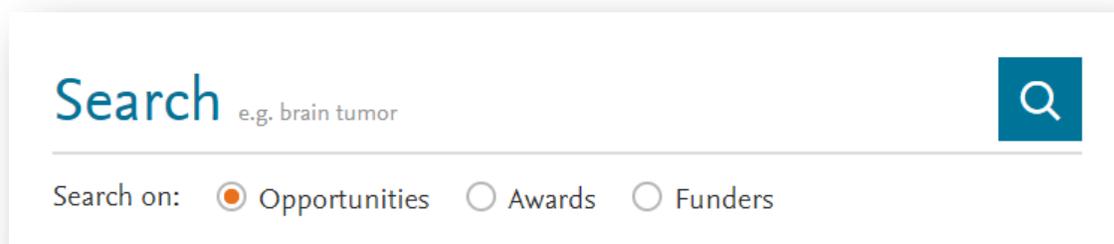
## 3. Search for Opportunities

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After logging into your account, you will be redirected to the Funding Institutional Homepage 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 relevant results will open once the search is completed.



Search e.g. brain tumor

Search on:  Opportunities  Awards  Funders

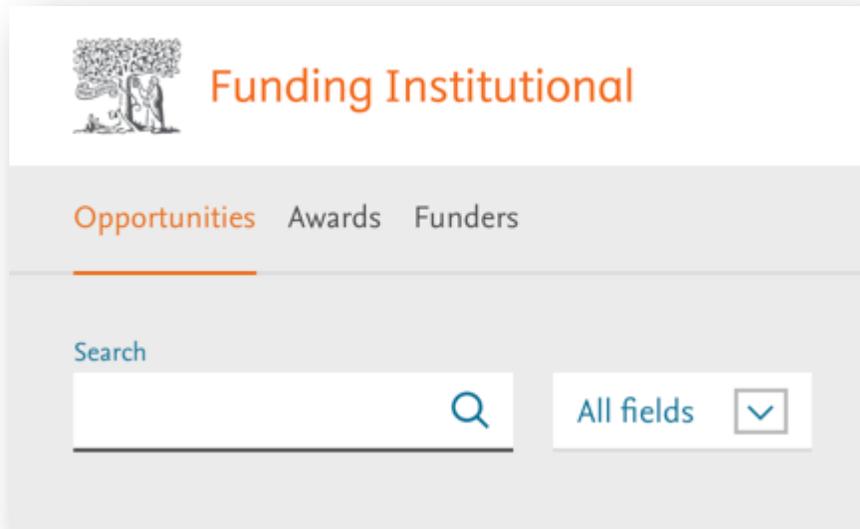
**Note:** Searching by keywords is optional; you can leave this field empty and search for all available content.

### 3.2 ADVANCED OPPORTUNITIES SEARCH

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

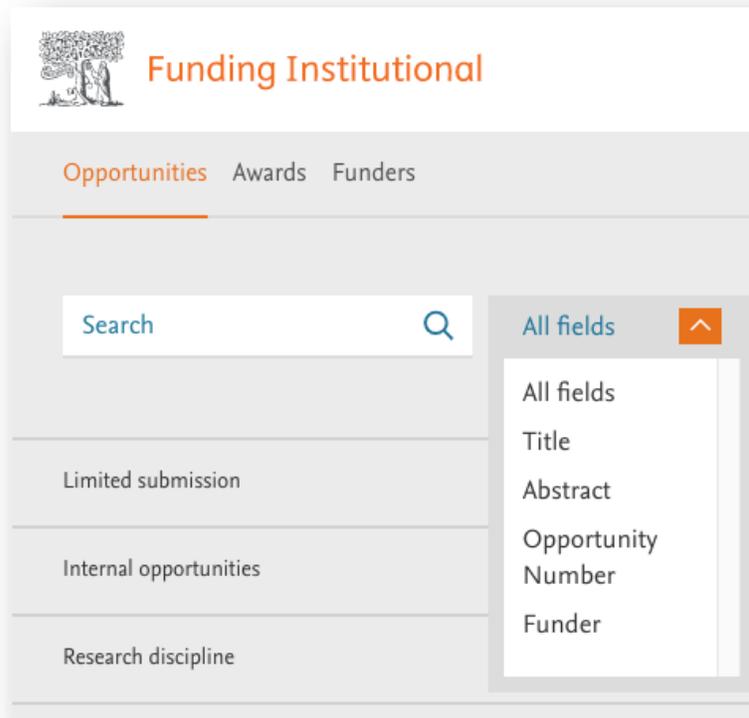
1. From the Funding Institutional Home page, click the **Search** button at the top navigation bar. The opportunities search page opens with an initial list of opportunities.
2. In the Search field, enter your search term.

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



### 3.2.1 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
<b>All fields</b>	Searches through all details of opportunities.
<b>Title</b>	Searches only in the titles of opportunities
<b>Abstract</b>	Searches only in the abstracts of opportunities
<b>Opportunity number</b>	Searches only external IDs of opportunities. An external ID is one assigned to an opportunity by the funding body.
<b>Funder</b>	Searches only opportunities with this funder name

### 3.2.2 ADDING SEARCH TERMS

If you wish to add more search terms, you have the option to select additional keyword entry rows. You can select various fields for each row while setting up your search.

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

Opportunities Awards Funders

Search

brain

All fields

Add row +

### 3.2.3 USING BOOLEAN OPERATORS WITH YOUR SEARCH

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

Opportunities Awards Funders

Search

brain

All fields

And  Or  And not

Search

All fields

Delete row x

### 3.2.4 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

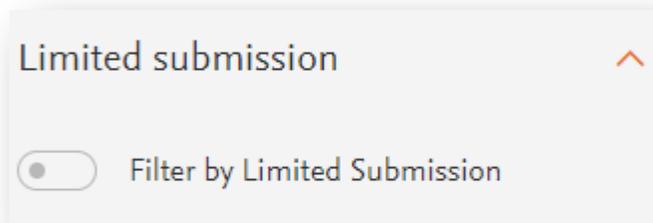
Use the Limited submission filter to narrow your search to show only opportunities with a limited submission.

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.

#### 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 be updated based upon your selection.



### 3.4 INTERNAL OPPORTUNITIES

Use the Internal opportunities filter to narrow your search to show only opportunities that are created within your institution.

#### Filter by Internal Opportunities

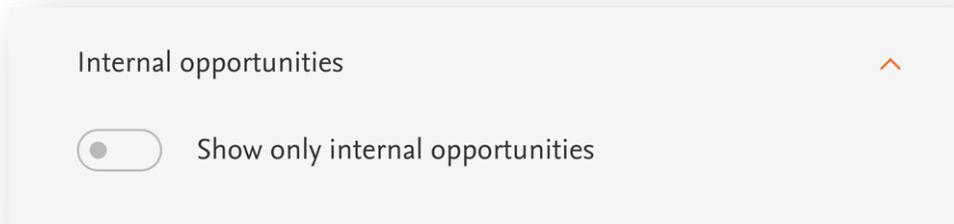
1. Click **Internal opportunities** to open the filter setting.
2. Select to filter your results list by opportunities that are considered internal.

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Your results list will be updated based upon your selection.



### 3.5 BROWSE RESEARCH DISCIPLINES

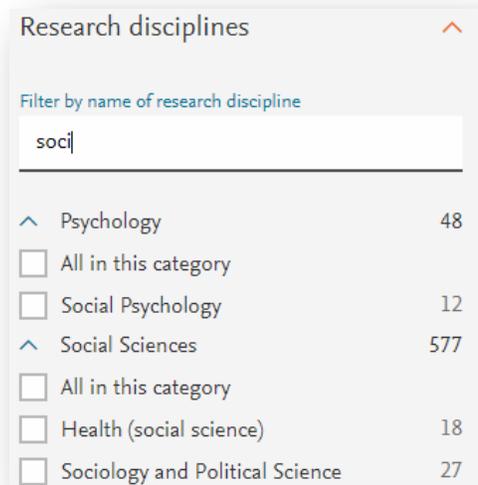
Research discipline browsing is available in Funding Institutional and is based on ASJC classification. ASJC codes are assigned to funding opportunities to define areas of interest and narrowing the scope of interest for search using Funding Institutional.

#### Browse by Research disciplines

1. Click **Research disciplines** to browse Research disciplines available on Funding Institutional. Research disciplines expand.
  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 be updated based upon your selection.

#### Keyword browse of Research disciplines

1. Click on **Research disciplines** to open the list of Research disciplines available on Funding Institutional. Research disciplines expand.
2. In 'Filter by name of research discipline's field, enter a search term. 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 be updated based upon your selection.



### 3.6 BROWSE FUNDING TYPES

Funding Institutional distinguishes Funding types based on types of research available for Funding Opportunities.

#### Browse by Funding types

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

Your results list will be updated based on your selection.

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

Funding type		^
<input type="checkbox"/>	Artistic pursuit	369
<input type="checkbox"/>	Contract, tender or cooperative agreement	804
<input type="checkbox"/>	Equipment and facilities	72
<input type="checkbox"/>	Fellowships, scholarships or trainings	6,363
<input type="checkbox"/>	Prizes	3,191
<input type="checkbox"/>	Programs and projects	2,589
<input type="checkbox"/>	Research and publications	5,278
<input type="checkbox"/>	Travel and Conferences	955

### Available Funding Types in Funding Institutional

Funding type	Definition
<b>Travel and Conferences</b>	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.
<b>Equipment and facilities</b>	This mechanism is designed to purchase, maintain or upgrade research equipment or lab facilities.
<b>Artistic pursuit</b>	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.
<b>Prizes</b>	Prizes can be both monetary and non-monetary. Non-monetary prizes are symbolic means to communicate that contributions are valued and appreciated.

<b>Contract, tender, or cooperative agreement</b>	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.
<b>Research and publications</b>	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.
<b>Fellowships, scholarships, or training</b>	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.
<b>Programs and projects</b>	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.

### 3.7 BROWSE CITIZENSHIP

Funding Institutional enables institutional staff to search for opportunities based on a researcher's citizenship. In some cases, citizenship within a Funding awarding country is necessary.

You can add multiple countries as you search.

#### Browse by Citizenship

1. If you click on **Citizenship**, a text entry field opens, where you can search for a country.
2. In the search field, you have to enter a country name. The Citizenship module autocompletes with a list of countries which meet the entered search term.
3. For each listed country of interest, select **Add** to include the country in your search.

- If necessary, repeat steps 2 and 3  
Your results list will be updated based on your text entry.

Citizenship

Enter your country of citizenship

arj

United Arab Emirates

Armenia

Aruba Add

Argentina

### 3.8 BROWSE FUNDER TYPE

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

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

#### Browse by Funder type

- If you click on **Funder type**, a list of types available on Funding Institutional will appear.
- Select one or more checkbox(es) next to a type to use within your search.  
Your results list will be updated 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 type="checkbox"/>	More	

## Available Funder types in Funding Institutional

Funder type	Definition
<b>Governmental Organizations</b>	Government institution that operates at a national level or governmental institution that operates at the sub-national level, meaning at the level of a federal state, province, country region or city.
<b>Business and Industry</b>	A profit-undertaking company, business, or industry engaged in entrepreneurial, economic, and commercial operation at a national or international level.
<b>Foundations</b>	<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>
<b>Nonprofit Organizations and Charities</b>	Nonprofit nongovernmental organizations (also called non-business entity) that do not fall under any of the categories above.
<b>International Organizations</b>	An organization with international membership. These include both governmental organizations and non-governmental, nonprofit organizations that operate internationally.
<b>Professional Associations and Societies</b>	A professional association whose objective is to promote academic discipline, advance a particular profession, or advance the interests of individuals in a profession
<b>Academic Institutions</b>	An institution whose main activity consists of providing education, conducting research, and granting degrees. These include both public and private education establishments.

### 3.9 BROWSE APPLICANT TYPES

Funding Institutional provides a means to locate opportunities based on 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.

#### 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 be updated 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
<b>Academic Institutions</b>	An institution whose main activity consists of providing education, conducting research, and granting degrees. These include both public and private education establishments.
<b>Commercial Organizations</b>	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.
<b>Early Career and New Faculty Researchers</b>	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.”
<b>Graduate Students</b>	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.
<b>Local or State Governments</b>	Opportunities where local or state governments are eligible to apply.
<b>Non-profit Organizations</b>	Opportunities that non-profit organizations are eligible to apply. Non-profit organizations can also be referred to as charities or NGO’s.
<b>Mid-Career and Experienced Researchers</b>	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.
<b>Minorities</b>	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.

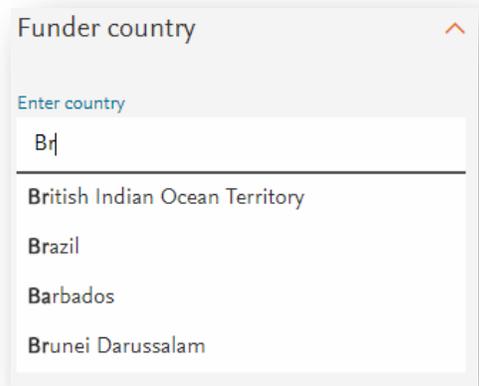
<b>Persons with Disabilities</b>	Opportunities for which ONLY disabled individuals may apply, or where disabled persons have a preference in the application process.
<b>Small and Medium Businesses</b>	Opportunities where small businesses (SME) are eligible to apply.
<b>Undergraduate Students</b>	Anyone currently in school working towards a bachelor's degree.
<b>Women Only</b>	Opportunities for which ONLY women may apply, or where women have a preference in the application process.

### 3.10 SEARCH FOR A FUNDER COUNTRY

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

#### Entering a Funder country

1. Click on **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 automatically 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 be updated according to your selections.



### 3.11 BROWSE APPLICATION DEADLINE

Funding Institutional enables users to search for opportunities based on the application deadline. The Application Deadline filter considers 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.*

### 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 be updated according to your selections.

### 3.12 BROWSE AMOUNT

Application Deadline

In 14 to 30 days

In 30 to 90 days

More than 90 days

or use calendar to select a range

Start date      End date

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

## Entering an amount

If you want to enter an amount to your search, follow the steps below:

1. Click on the word **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.

The screenshot shows a modal window titled 'Amount' with an upward arrow icon in the top right corner. Inside the modal, there are two input fields. The first field is labeled 'Min amount in USD' and has a blue 'x' icon to its left and a grey 'Add' button to its right. The second field is labeled 'Max amount in USD' and also has a blue 'x' icon to its left and a grey 'Add' button to its right.

## 3.13 SEARCH FOR AN OPPORTUNITY FUNDER

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

### 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 modal window titled 'Funder' with an upward arrow icon in the top right corner. Below the title, there is a blue prompt 'Enter your preferred funder'. A search input field contains the text 'marc'. Below the input field, a list of funders is displayed. The first two entries are 'March of Dimes Foundation (0)' and 'March of Dimes Canada (0)', both with blue 'Add' buttons to their right. The third entry is 'James S. McDonnell Foundation (0)', which has a small orange square icon to its left and a blue 'Add' button to its right.

## 4. Search for Awards

Funding Institutional provides the option to view awards which were previously granted. Considering previous 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. Consider the following example:

The screenshot shows the 'Funding Institutional' interface. At the top, there are tabs for 'Opportunities', 'Awards', and 'Funders'. Below the tabs is a search bar with the text 'linguistics' and a search icon. To the right of the search bar is a dropdown menu labeled 'All fields'. Below the search bar is a button labeled 'Add row +'. To the right of the search bar, there is a summary of results: '1,428 Awards'. Below this summary is a button labeled 'Keyword: linguistics x' and a button labeled 'Clear all x'. Below the summary is a checkbox labeled 'All 0 selected'. Below the checkbox is a table with the following rows:

	Title
<input type="checkbox"/>	AP Linguistics Conference Support 1 <a href="#">Open preview</a>
<input type="checkbox"/>	Citizen Linguistics 2 <a href="#">Open preview</a>
<input type="checkbox"/>	Workshop: The International Linguistics Olympiad 3 <a href="#">Open preview</a>

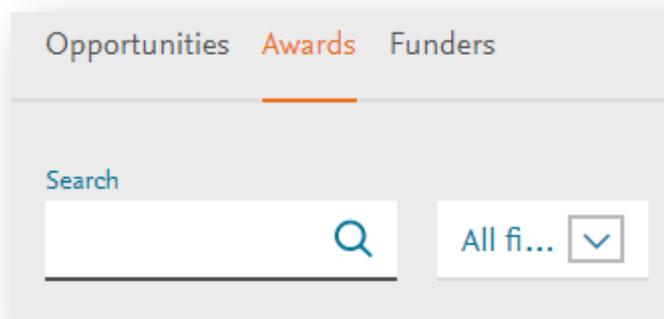
**Note:** Searching by keywords is optional; you can leave this field empty and it will list all available content.

## 4.2 AWARDS ADVANCED SEARCH

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

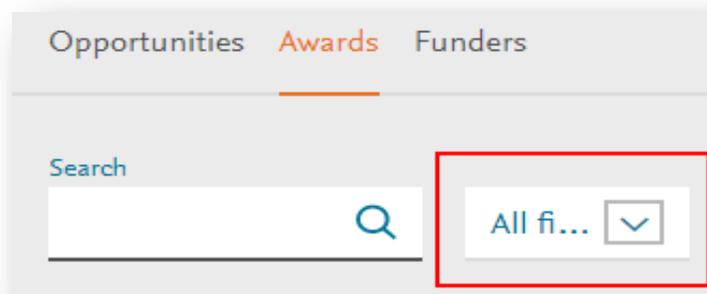
1. From the Funding Institutional home page, click **Search** on the top navigation bar and make sure Awards is selected. The Funding Institutional starts searching and opens a new page with an initial list of available awards.
2. In the Search field, enter your search term.

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



### 4.2.1 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
<b>All fields</b>	Searches through all details of awards.
<b>Title</b>	Searches only in the titles of awards.
<b>Abstract</b>	Searches only in the abstracts of awards.
<b>Awardee</b>	Searches only in the awarded researchers of awards.
<b>Awarded institution</b>	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.
<b>Grant ID</b>	Searches only external IDs of awards. An external ID is one assigned to an opportunity by the funding body.
<b>Funder</b>	Searches only awards with this funder name

## 4.2.2 ADDING SEARCH TERMS

If you wish to add more search terms, you have the option to select 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 button labeled 'Add row +' with a plus sign, which is highlighted with a red rectangular box.

## 4.2.3 USING BOOLEAN OPERATORS WITH YOUR SEARCH

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

The screenshot shows the same search interface as in the previous image, but with additional options. Below the first search bar and dropdown menu, there are three radio button options: 'And' (which is 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' with an 'x' icon.

### 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 to define areas of interest and narrow the scope of interest when searching for awards in Funding Institutional.

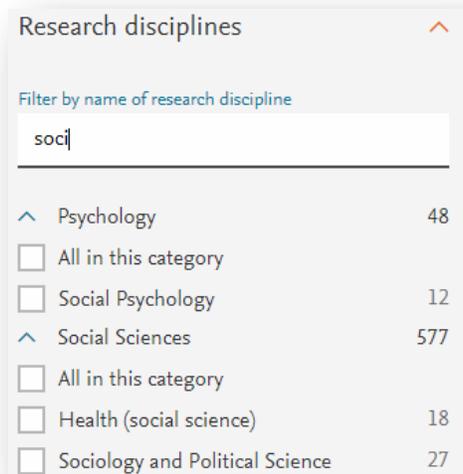
#### Browse by Research disciplines

1. Click **Research disciplines** to browse Research areas available on Funding Institutional. Research disciplines expand.
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 on 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 expand.
2. In **Filter by name of research discipline**, enter a search term into the field. The Research discipline listing is being updated while 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 be updated based on your selection.



#### 4.4 BROWSE AWARDED INSTITUTION

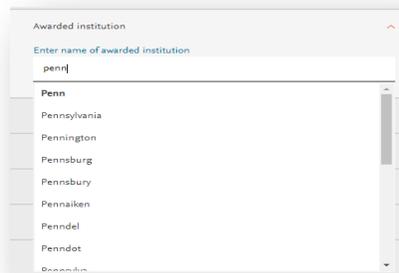
Funding Institutional enables the user to search for Awards based on an Awarded Institution, the institution which has received an award.

You can add multiple institutions as you search.

##### Browse by Awarded Institution

1. Click on **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 be updated 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.

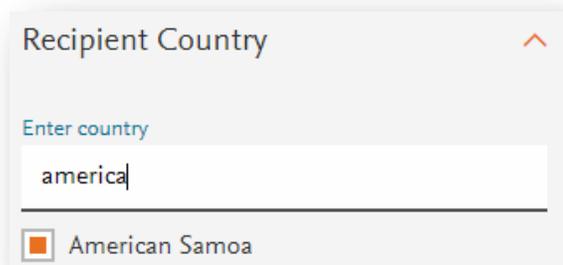
### Browse by Awarded Researcher

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. You can add more than one researcher by following the same process. The result list will be updated based on all the items you have selected.

## 4.6 BROWSE RECIPIENT COUNTRY

Funding Institutional enables the user 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.

### Browse by Recipient Country

1. Click on **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.

## 4.7 SEARCH FOR AN AWARD FUNDER

Funder filter helps you search for awards offered by a specific funder.

### Entering a Funder name

1. Click on **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)

## 4.8 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.

### Browse by Funder type

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

Funder type

Governmental Organizations 504

Business and Industry 17

Foundations 217

Nonprofit Organizations and Charities 119

International Organizations 42

∨ More

## Available Funder types in Funding Institutional

Funder type	Definition
<b>Governmental Organizations</b>	Government institution that operates at a national level.
<b>Business and Industry</b>	A profit-undertaking company, business, or industry engaged in entrepreneurial, economic, and commercial operation at a national or international level.
<b>Foundations</b>	<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>
<b>Nonprofit Organizations and Charities</b>	Nonprofit nongovernmental organizations (also called non-business entity) that do not fall under any of the categories above.
<b>International Organizations</b>	An organization with international membership. These include both governmental organizations and non-governmental, nonprofit organizations that operate internationally.

<b>Professional Associations and Societies</b>	A professional association whose objective is to promote academic discipline, advance a particular profession, or advance the interests of individuals in a profession
<b>Academic Institutions</b>	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

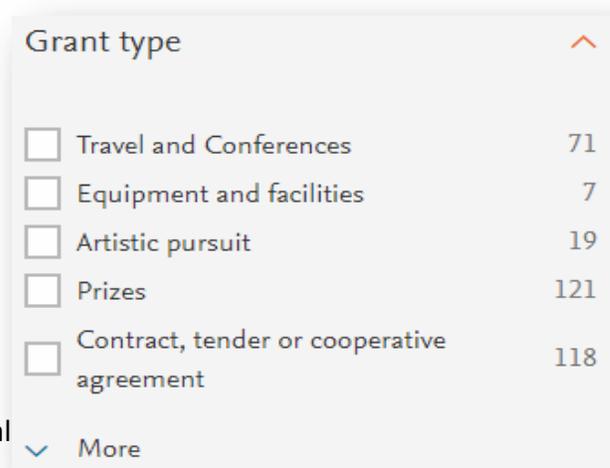
Funding Institutional distinguishes Funding types based on types of research available for Funding awards.

### Browse by Funding types

1. Click **Funding types** to browse different types of funding available on Funding Institutional. Funding types expand.
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.



## Available Funding Types in Funding Institutional

Funding type	Definition
<b>Travel and Conferences</b>	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.
<b>Equipment and facilities</b>	This mechanism is designed to purchase, maintain or upgrade research equipment or lab facilities.
<b>Artistic pursuit</b>	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.
<b>Prizes</b>	Prizes can be both monetary and non-monetary. Non-monetary prizes are symbolic means to communicate that contributions are valued and appreciated.
<b>Contract, tender, or cooperative agreement</b>	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.
<b>Research and publications</b>	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.
<b>Fellowships, scholarships, or training</b>	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.
<b>Programs and projects</b>	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.

### 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.

Amount

Minimum amount in USD

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.

### 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.

Award start year

<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

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## 5. Search for Funders

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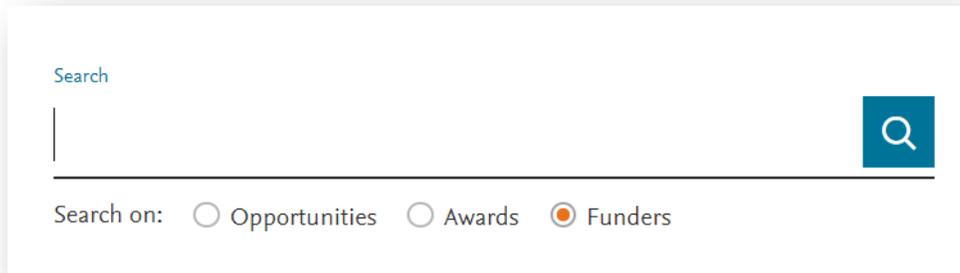
Funding Institutional provides the option to locate and view grant funders.

### 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.

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

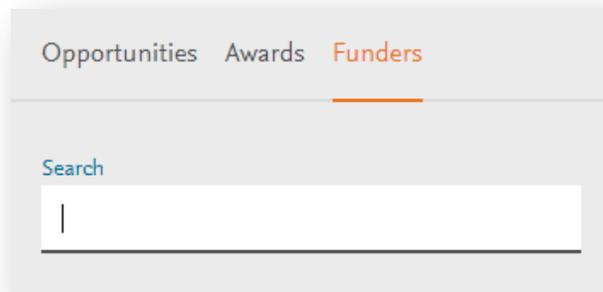


### 5.2 FUNDERS ADVANCED SEARCH

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 organizations.
2. In the Search field, enter your search term.

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

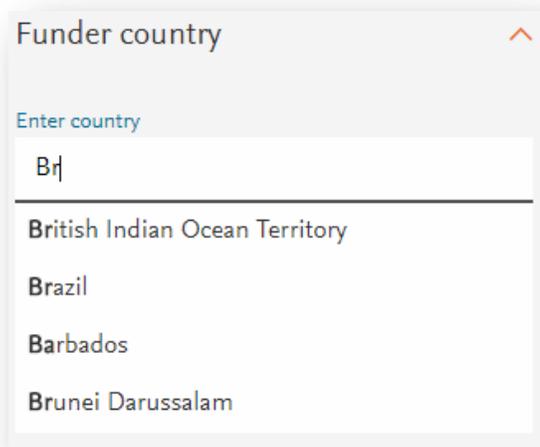


### 5.3 SEARCH FOR A FUNDER COUNTRY

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

#### Entering a Funder country

1. Click **Funder country** to open the search entry field.
2. Enter a search term within the entry field. Once you start entering a term, Funding Institutional lists funding countries based on 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.



## 5.4 BROWSE FUNDER TYPE

The Funder type filter helps you to locate funding organizations 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.

### Browse by Funder type

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

Your results list will update based upon your selection.



The screenshot shows a dropdown menu titled "Funder type" with an upward-pointing arrow on the right. The menu contains five items, each with an unchecked checkbox, the name of the funder type, and the number of results associated with it. At the bottom of the menu is a "More" option with a downward-pointing arrow.

Funder type	Count
<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
More	

## Available Funder types in Funding Institutional

Funder type	Definition
<b>Governmental Organizations</b>	Government institution that operates at a national level.
<b>Business and Industry</b>	A profit-undertaking company, business, or industry engaged in entrepreneurial, economic, and commercial operation at a national or international level.
<b>Foundations</b>	<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>
<b>Nonprofit Organizations and Charities</b>	Nonprofit nongovernmental organizations (also called non-business entity) that do not fall under any of the categories above.
<b>International Organizations</b>	An organization with international membership. These include both governmental organizations and non-governmental, nonprofit organizations that operate internationally.
<b>Professional Associations and Societies</b>	A professional association whose objective is to promote academic discipline, advance a particular profession, or advance the interests of individuals in a profession
<b>Academic Institutions</b>	An institution whose main activity consists of providing education, conducting research, and granting degrees. These include both public and private education establishments.

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## 6. Exporting search results

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Funding Institutional provides the option to export funding opportunities, awarded grants or funders and save them as 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 the funder
- Count of active opportunities
- Hyperlink to funder opportunities

### 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 if 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**, you will be able to save the selected items from your results list 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 summary of opportunities, as well as link to more detailed information.

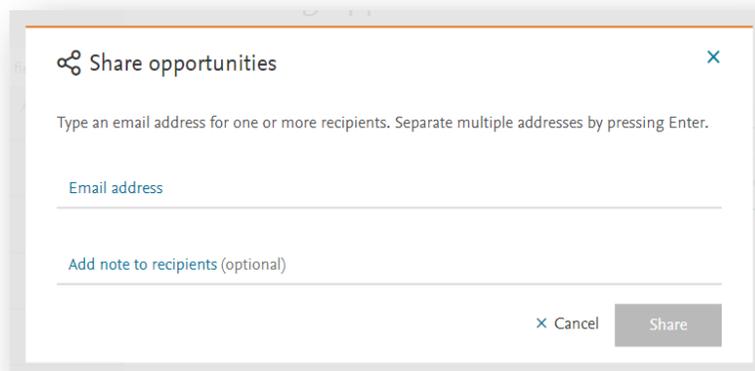
There are two ways to share opportunities:

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

### 7.1 SHARING OPPORTUNITIES FROM A SEARCH RESULTS LIST

To share funding opportunities from a search results list, follow the steps below:

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 only the opportunities on the page or all the related opportunities.
2. 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.
3. Click **Share**.
4. 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 opportunities

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

Email address

Add note to recipients (optional)

Cancel Share

## 7.2 SHARING AN OPPORTUNITY FROM THE DETAILS PAGE

To share a funding opportunity from the details page, follow the steps below:

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.

#### 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 'Page' dropdown (set to 0 selected), a 'Track' button with a star icon, 'Export as XLS', 'Share', and 'Sort by: Last updated'. The table has four columns: Title, Funder, Deadline, and Amount. Three rows are visible, each with a checkbox and an 'Open preview' link.

	Title	Funder	Deadline	Amount
<input checked="" type="checkbox"/>	Enhancer epigenomic regulation 1 <a href="#">Open preview</a>	American Chemical Society	In 338 days <a href="#">All deadlines</a>	Up to 3,000 USD with...
<input type="checkbox"/>	Bioinformatics and comparative genomics 2 <input type="text" value="Minimum doctors degree"/> <a href="#">Open preview</a>	Frankel Center for Judaic Studies, University of Michigan	In 103 days <a href="#">All deadlines</a>	Not specified
<input checked="" type="checkbox"/>	Molecular mechanisms heterostyly in Primula 3 <a href="#">Open preview</a>	Robert Wood Johnson Foundation	In 47 days <a href="#">All deadlines</a>	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. 8.2 Setting Alerts for a tracked opportunity.
  - c. 8.3 Assigning a tracked opportunity to groups.

### 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. 8.2 Setting Alerts for a tracked opportunity.
  - f. 8.3 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.

The screenshot shows the 'Track Opportunity' form with three main sections: Updates, Deadline alerts, and Groups. The 'Updates' section has a checkbox for 'Send me opportunity updates' which is currently unchecked. The 'Deadline alerts' section has three 'Add alert' buttons with dropdown menus showing '4 weeks before', '1 week before', and an empty dropdown. Each 'Add alert' button has a corresponding 'Remove alert' button below it. The 'Groups' section has an 'Assign to group' dropdown menu. At the bottom right, there are 'Cancel' and 'Track' buttons. Two orange arrows point to the 'Updates' and 'Deadline alerts' sections with explanatory text.

**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 option. 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 the 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

Cancel Track

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

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, now they 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** and then on 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.

The screenshot shows the 'My Funding' page on the Funding Institutional website. The page has a navigation bar with 'Home', 'Search', 'My funding', and a 'PX' button. A left sidebar contains 'My Funding', 'Saved searches', 'Tracked opportunities', and 'Recommended opportunities'. The main content area is titled 'Tracked opportunities' and contains a table with the following data:

Groups	Opportunities	Actions
All	569	
Not grouped	10	
Limited submission	559	

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”

This screenshot is identical to the one above, showing the 'My Funding' page with the 'Tracked opportunities' table. The table data is as follows:

Groups	Opportunities	Actions
All	569	
Not grouped	10	
Limited submission	559	

## 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.

### Editing the settings of a tracked opportunity from My Funding > Tracked Opportunities

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.

### 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.

### 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.

### 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 is a sidebar with 'My Funding', 'Saved searches', and 'Tracked opportunities'. The main content area is titled 'Biochemistry Genetics' and shows '4 Tracked Opportunities'. There are buttons for 'Delete group' and 'Rename group'. Below this is a table of opportunities with columns for Title, Funder, Deadline, Amount, and Edit tracking. The first opportunity, 'Clinical biochemical genetics fellowship (Minnesota)', is selected and has an 'Untrack' button highlighted. The second and third opportunities are 'Protein biochemistry fellowship - CDER' and 'PBT Recognition award in insect physiology, biochemistry and toxicology'.

	Title	Funder	Deadline	Amount	Edit tracking
1	Clinical biochemical genetics fellowship (Minnesota) Graduate Students Open preview	Mayo Clinic	in 28 days All deadlines	Up to 78,269 USD	
2	Protein biochemistry fellowship - CDER Graduate Students Mid-Career and Experienced Researchers Open preview	Oak Ridge Associated Universities	Deadline not specified	Not specified	
3	PBT Recognition award in insect physiology, biochemistry and toxicology Open preview	Entomological Society of America	in 271 days All deadlines	Up to 1,500 USD	

### Untracking an opportunity from the Opportunity Details page

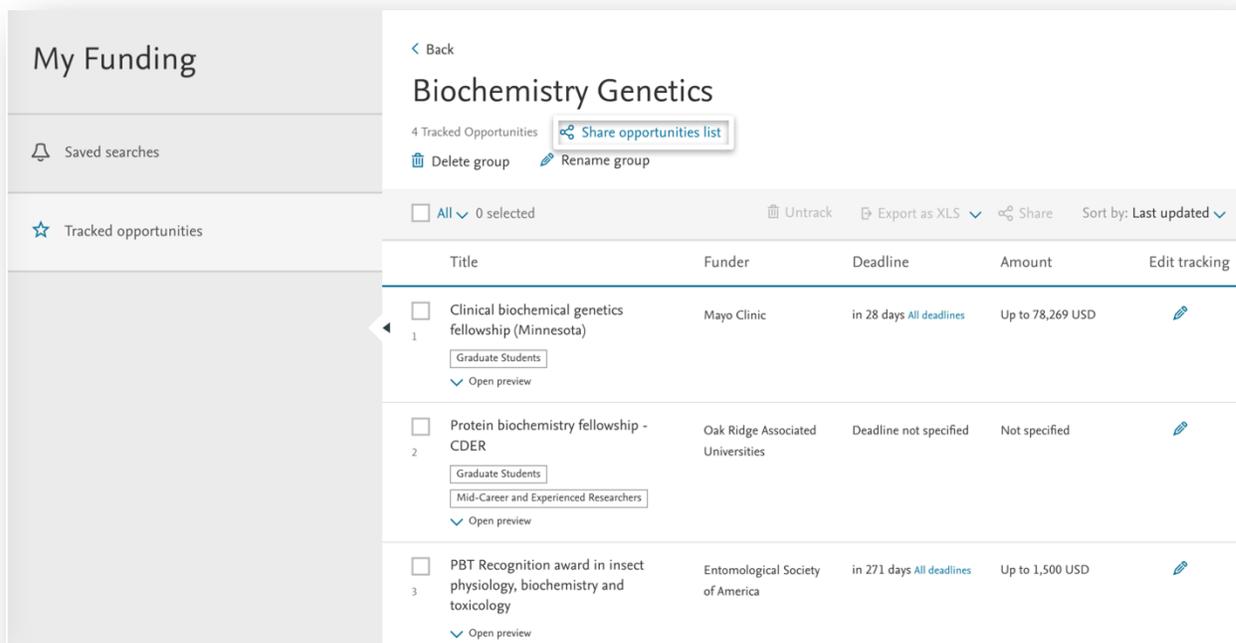
To untrack an opportunity from the Opportunity Details page, do the following:

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.



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 opportunities 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 the clipboard.

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

- 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 should be inside the IP Network of the institution.

Only the user that created the group can 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

## 10. Saving your Searches

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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**. 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 you want to receive an alert for updates regarding your saved search or not.  
If you opt to receive alerts, you must select an **Alert frequency**.
5. Click the **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**.

### 10.2 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.

### 10.3 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.

### 10.4 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 searchers, 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 the **Shareable link** to copy a hyperlink for your personal use
4. Click **Save**. Your saved search is updated.

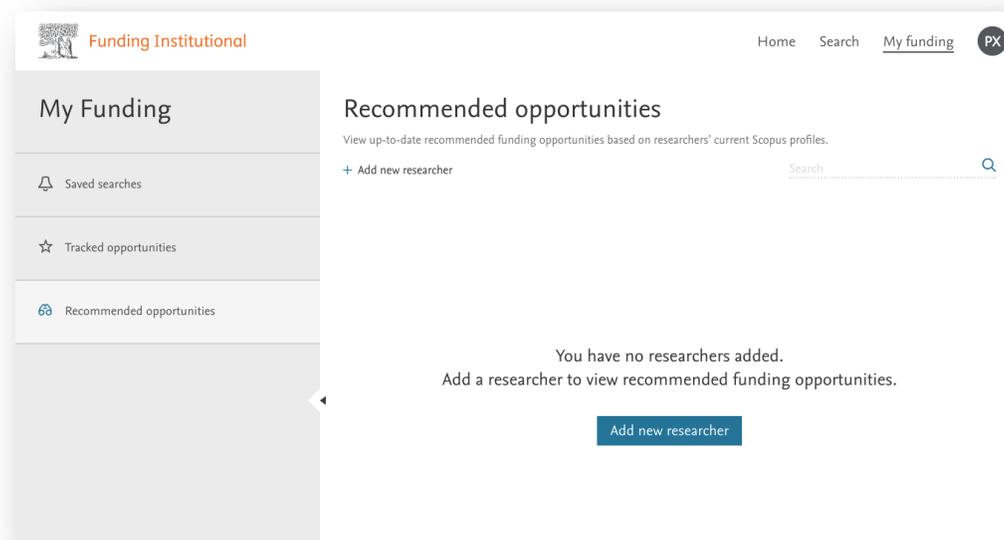
# 11. Funding Opportunities Recommendations

**Funding Institutional** offers you and your team/faculty members the opportunity to discover Relevant Funding Opportunities from funders that you may not normally use in your searches. Funding Institutional connects the relevant funding opportunities to the right researcher by linking to their Scopus Profile and provides the most relevant results according to their research interest. The recommendations that are provided to you are selected according to the similarity in your current research, your location or region, and your seniority.

## 11.1 LINK TO THE SCOPUS AUTHOR PROFILE

To add the researchers for which you want to get funding recommendations, follow the steps below:

1. Click on **My Funding** in the top right-hand corner of the **Home** page. The **My funding** page opens.
2. Click on **Recommended opportunities** and add the researcher for which you want to get funding recommendations, by linking to their Scopus Author Profile.



3. Click on **Add new researcher** to reach the Scopus Author Profile. You can reach the Scopus Author Profile by one of the following options:
  - Name (First Name and Last Name are mandatory fields) and optionally the Affiliation Information
  - Scopus Author ID

- ORCID

You can also review the authors returned when performing the search against the Scopus Author Profiles database, by checking the affiliation information and the most recent publications of each author.

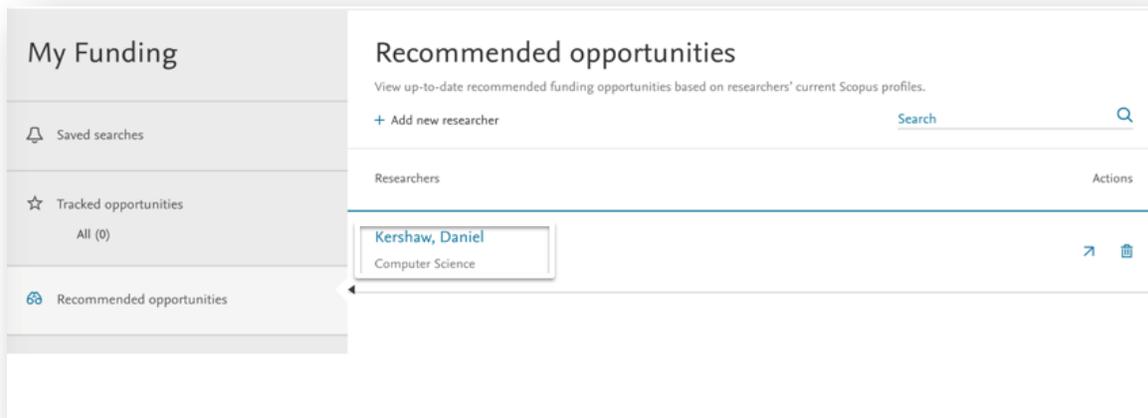
4. Select a Scopus Author Profile from the list of search results that will appear.

5. After selecting the Scopus Author Profile, you can get recommendations by adding the researcher to the list.  
The most relevant 20 opportunities will appear.

You can immediately share the opportunities with the relevant faculty members or add the most relevant opportunities in a group and share it.

## 11.2 USER WITH CLAIMED SCOPUS PROFILE

If you already have a Scopus Author Profile and you previously claimed the Scopus Profile, then you will automatically see recommendations for you. See the following example:



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## 12. User Roles

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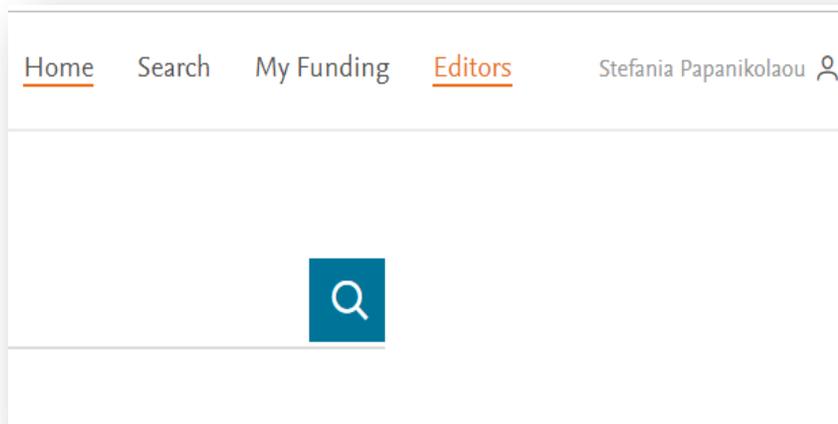
User roles define the permissions for Funding Institutional' s users to perform different tasks. Funding Institutional contains two User Roles, Editor Role and Admin Role. We will refer to them as “Editor” and “Admin” respectively:

- a) **Editor:** The Editor role, has access to the product functionality that are available for all other users, such as search, save searches, track, export, share, recommendations etc., as well as additional product options such as creating internal opportunities and adding notes, which will be visible only to the members of the same institution.
- b) **Admin:** The users with the Admin role have access to the same functionality as the users with the Editor role and the rest of the users. In addition to this, if you have been assigned the Admin role, you will be able to assign roles to the other Funding Institutional users from your institution and to remove roles. Furthermore, the Admin role allows you to add contact details for general account information or communication for the product. Every Funding Institutional customer account should have at least one user with the Admin role.

### 12.1 EDITOR

As a user with the Editor role, you have access to the same product functionality as the rest of the users, as well as additional product options such as creating internal opportunities and adding notes, which will be visible only to the members of the same institution.

If you have an Editor or Admin Role, you will be able to see an additional item in the main menu, called “Editors”. The “Editors” module is only available for users with “Editor” or “Admin” role.



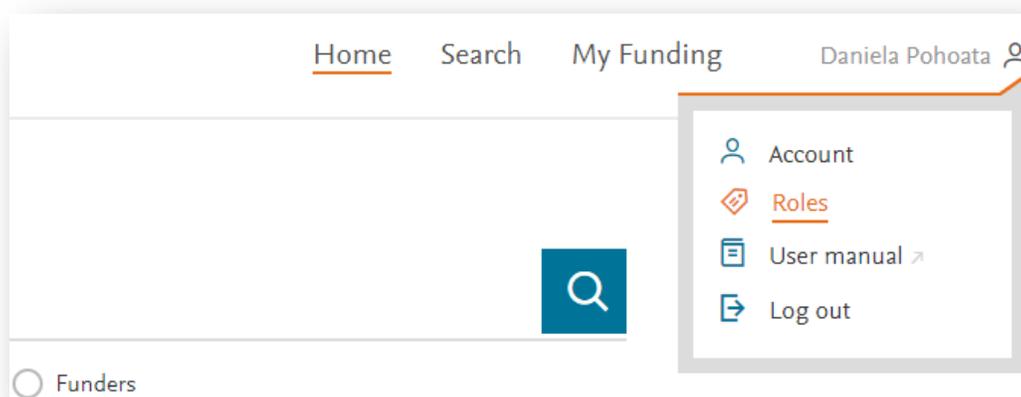
## 12.2 ADMIN

The users with the Admin role have access to the same functionality as the users with the Editor role and the rest of the users. In addition to this, if you have been assigned the Admin role, you will be able to assign roles to the other Funding Institutional users from your institution and to remove roles. Furthermore, the Admin role allows you to add contact details for general account information or communication for the product.

There can be multiple users with the Admin role at an institution.

If you are Admin, you can find Roles under your name at the top right-hand corner of the page:

1. Click on your name.
2. Select **“Roles”** in the box that will appear, and a new page will open automatically illustrating all the Roles that are assigned to your institution’s members.

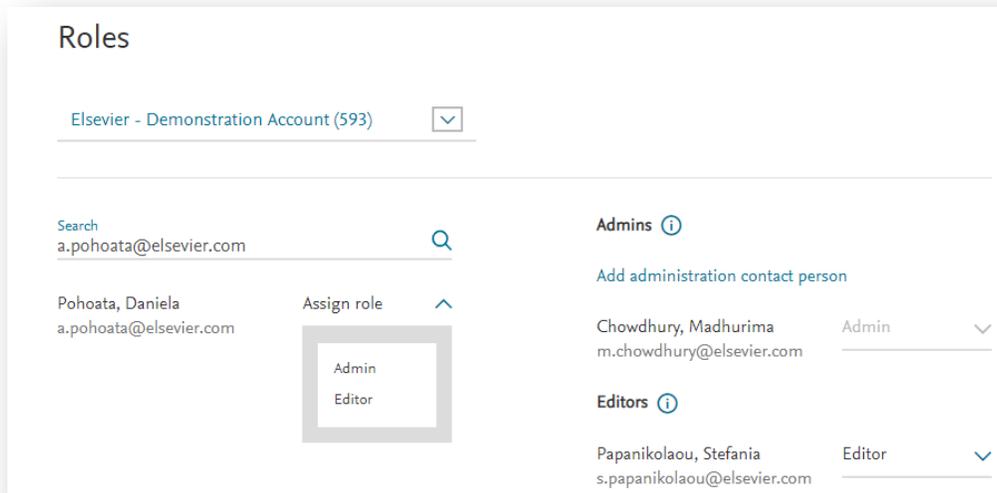


### Assign/remove roles

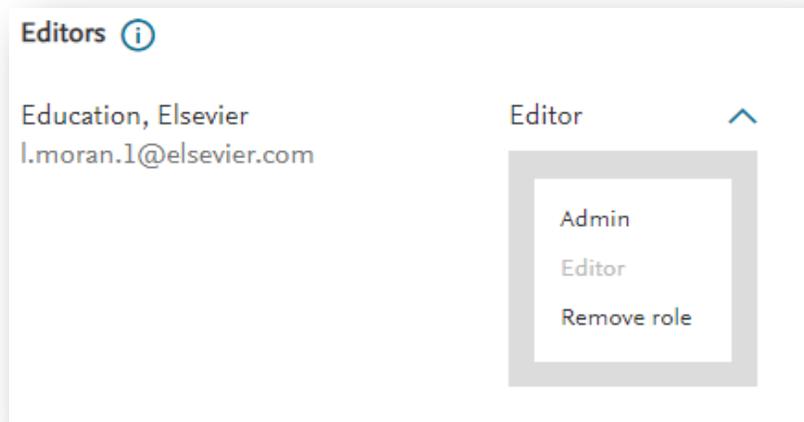
As an Admin you have access to manage the roles of the other Funding Institutional users from your institution.

*Note:* the users should already have an account on Funding Institutional for you to be able to manage their roles.

1. Go to the **“Roles”** page (following the same process.)
2. In the **“Search”** tab write the e-mail of the user from your institution that you want to assign a Role to, and under the **“Search”** tab will appear the name and the e-mail of the member you searched for.



3. Select the Role which you want to assign to the user, by clicking either on **“Admin”** or **“Editor”** under the **“Assign role”**.
4. If you want to modify an existing Role, (for eg. to change an Editor to Admin or to **Remove Role**), you can click on the arrow next to the member’s name and change the status of the role.



### Adding contact details

As an Admin you can also add Funding Institutional contact details which are available to the users at your institution, to let them know who to contact about their Funding Institutional account and permissions. Only the users that have the Admin role can be assigned as contact persons.

To do this, click on the **“Add administration contact person”** under the **Admins”**:

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**Admins** ⓘ

Add administration contact person

Shcherba, Viktor  
v.shcherba@elsevier.com  
Contact person

Admin ▾

Complete the contact details and press the **Save** button. Users can find their institution's administration contact person, in their profile page by clicking on the **Account** on the top right corner.

⌵ Add administration contact person ✕

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

This information will appear in Profile > Account.

Add administration contact person

\* Shcherba, Viktor ▾

Additional information \_\_\_\_\_

Don't show administration contact person

Cancel Save

An Administrative contact person will act as the point of contact for all Funding Institutional users of your institution, providing administrative support and managing their queries.

Users can find their institution's administration contact person, in their profile page by clicking on the **Account** on the top right corner:

Account information

**Admin**

As an admin you have basic product functionalities like search, track, export, share, etc., advanced product options such as creating new opportunities and adding notes, as well as access to users list and role assignments.

To view users list and roles go to Profile > Roles.

**Funding Institutional admin contact in your institution:**  
Viktor Shcherba  
v.shcherba@elsevier.com

## 13. Add Notes

If you are an **Admin** or **Editor**, you have the option to add extra Notes to funding opportunities. Adding supplementary Notes helps you sharing specific information about any funding opportunity or funder, with all the researchers within your institution (Admins, Editors, and Viewers).

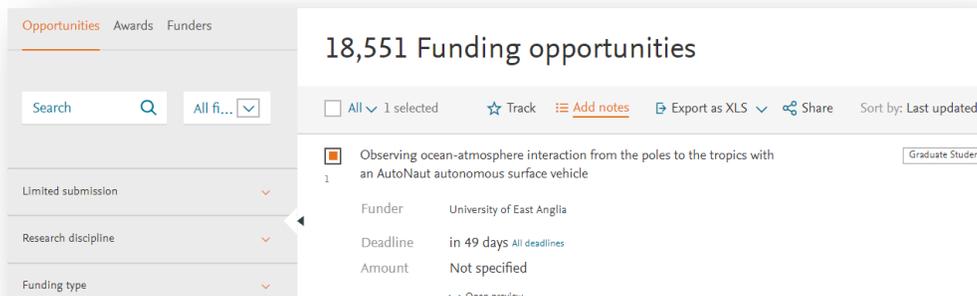
There are two options to add notes:

- a) Add notes for funding opportunities.
- b) Add notes for funders.

### 13.1 ADD NOTES FOR FUNDING OPPORTUNITIES

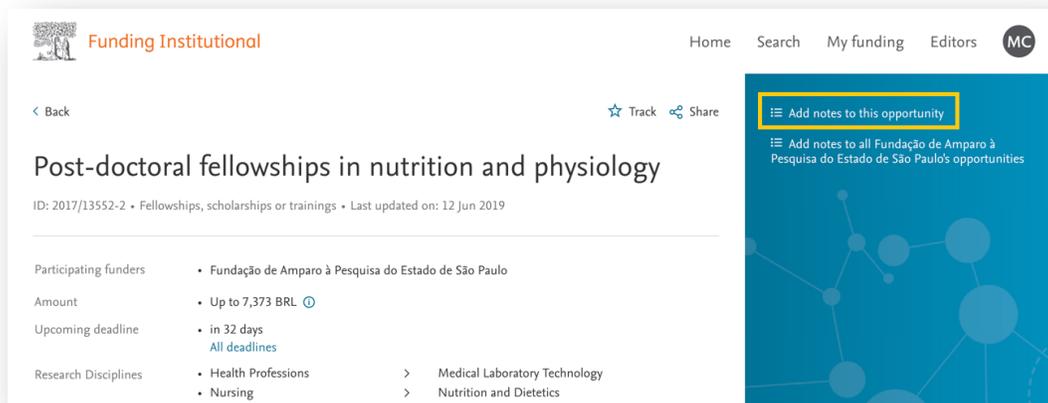
The following instructions indicate from which pages you can add notes for one or more **funding opportunities**:

1. On the **Main search results** page, choose one or more opportunities and click on **Add notes** (from the toolbar):



**Note:** From this page, you can add the same notes to multiple opportunities, by selecting more than one opportunities from the results list and click on **Add notes**.

2. On the **Opportunity details** page, on the top right corner over the blue background, click on **Add notes to this opportunity**:



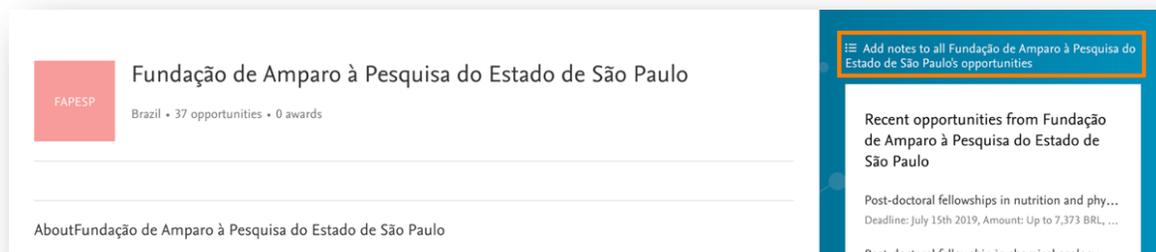
When you click on the **Add notes** button, a pop-up window appears. Enter the relevant information in the empty fields and click on **Save** to complete your action:

- 1) **Notes title:** Add a title for your Notes.
- 2) **Deadline:** Set one or more deadlines. You can add a description to explain the type of each deadline.
- 3) **Internal contact:** Add contact details of any person within your institution, to be contacted in case of questions or other issues.
- 4) **Additional Description:** Type an Additional Description, if you wish to give more information about your notes.
- 5) **Add file:** Add a file to your notes that other members of your institution can download. You can upload up to 10 files.

## 13.2 ADD NOTES FOR FUNDERS

Add notes for **Funders** from the following pages:

1. From the **Funder profile page**, on the top right side over the blue background:



- From the **Opportunity details page**, on the top right side over the blue background:

After selecting the **Add Notes** button from the above pages, enter the relevant information in the pop-up window and click on **Save** to complete your action. These Notes appear in the funder's page, as well as in the details page of every opportunity by this funder.

- Internal contact:** Add contact details of any person within your institution, to be contacted in case of questions or other issues regarding the Notes.
- Additional description:** Write an additional description to give more information about the Notes you added.

3. **Add file:** Add a file to your notes that other members of your institution can download. You can upload up to 10 files.

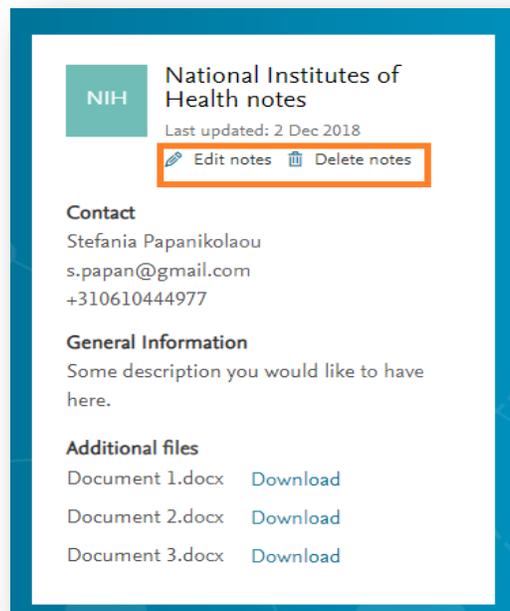
**Note:** The existing Notes of a funder are automatically transferred to any new opportunity created by the same funder.

In addition to the pages mentioned above, Editors and Admins can manage Opportunity and Funder Notes from the **Notes page** under the **Editors tab**:

Noted opportunity	Noted funder	Last updated on	Last updated by	Actions
<input type="checkbox"/> Science of Learning (SL) 1	✓	24 Apr 2019	Daniela Pohoata	
<input type="checkbox"/> BRAIN Initiative Cell Census Network (BICCN) specialized collaboratory on human and		24 Apr 2019	Daniela Pohoata	

Admins and Editors can **edit** or **delete** Notes:

- By clicking the relevant buttons, on the right side of every opportunity/funder on the **Notes page** (see the above image), or
- By selecting the edit/delete buttons from the existing Notes on the **Funder profile page** or **Opportunity details page**:



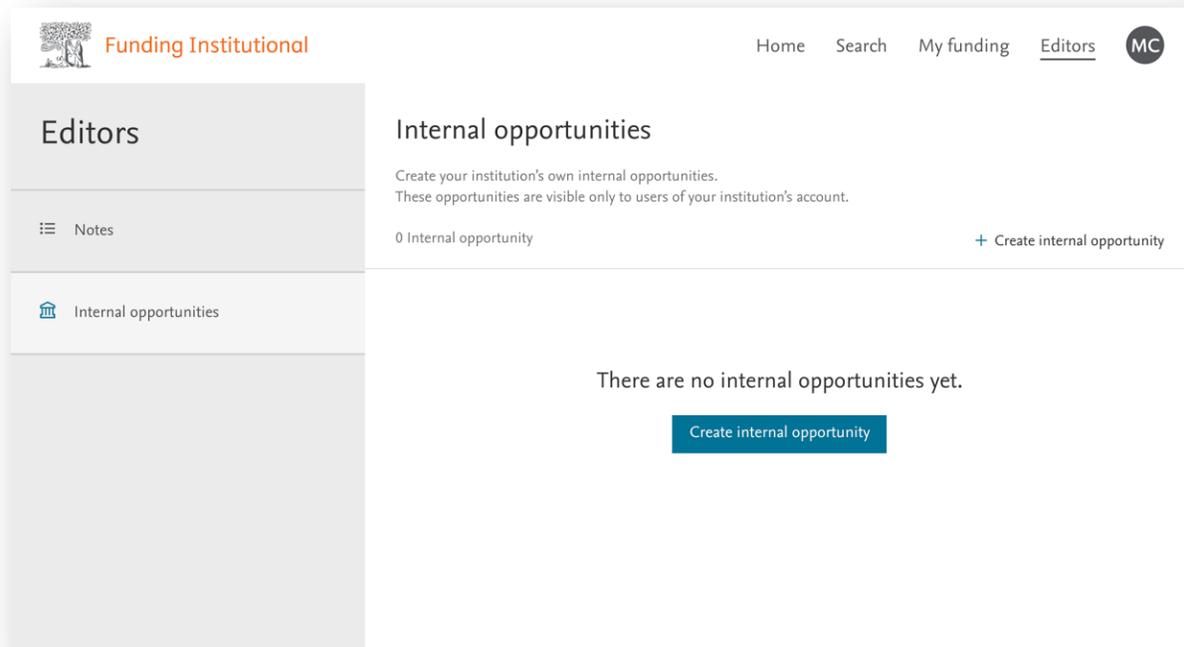
# 14. Internal Opportunity

If you are an **Admin** or **Editor**, you can create an **Internal Opportunity**. Creating an Internal Opportunity at Funding Institutional enables you to manage both internal and external opportunities from one single product.

## 14.1 CREATE AN INTERNAL OPPORTUNITY

To create an Internal Opportunity, follow the steps below:

1. Click on **Editors** in the top right-hand corner of the Home page. Editors menu opens.
2. From the Editors menu, click **Internal opportunities** and the Internal opportunities list page opens.



3. Click **Create internal opportunities** button to open the internal opportunity form. Enter the relevant information in the empty fields.
  - a. **General information:** Add a title, ID, type, announcement page link and description for the internal opportunity.
  - b. **Research discipline:** Select a research discipline and a subdiscipline for the internal opportunity.
  - c. **Deadlines:** Set one or more deadlines. You can select the type of the deadline and add a description.
  - d. **Amount:** Set amount and currency. You can add description for the amount.

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- e. **Eligibility:** Select an applicant eligibility and a career level. You can add a description for the eligibility criteria.
- f. **Contact details:** Add contact details of the person, to be contacted in case of questions or other issues.
- g. **How to apply:** Add a description for the application process of the opportunity.
- h. **Add file:** Add a file to the opportunity that other members of your institution can download. You can upload up to 10 files.

After filling all the mandatory fields, you can publish the internal opportunity by clicking the **Publish & make active**. When you publish an internal opportunity, it will be visible in both internal opportunities list and the opportunity search results list to all users (Admins, Editors, Viewers).

4. You can save the internal opportunity to work it on later by clicking **Save as draft**. Draft internal opportunities will be listed at the Internal opportunities list page with the status “Unpublished draft”, and these will be visible only to the Admins and Editors in your institution.

The screenshot shows the 'Create an internal opportunity' form in the Funding Institutional system. The page has a header with the logo and 'Funding Institutional' text, and navigation links for Home, Search, My funding, Editors, and a user profile icon (MC). A left sidebar contains 'Editors', 'Notes', and 'Internal opportunities'. The main content area is titled 'Create an internal opportunity' and includes a back link. Below the title is a brief instruction: '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.' A red asterisk indicates required fields. The form sections are:
 

- General information:**
  - \* Title of opportunity: Text input field.
  - ID: Text input field.
  - \* Opportunity type: Dropdown menu.
  - Announcement page (Enter full URL, e.g. http://www.website.com): Text input field.
- Opportunity description:**
  - \* Opportunity description: Rich text editor with a toolbar containing Bold (B), Italic (I), Underline (U), Link (O), Bulleted list (☰), and Numbered list (☰).
- Research disciplines:**
  - \* Research discipline: Dropdown menu.
  - \* Subdisciplines: Dropdown menu.
  - Remove discipline (X) and Add discipline (+) buttons.

## 14.2 VIEWING AN INTERNAL OPPORTUNITY

All users (Admin, Editor, Viewer) can view the published and active internal opportunities together with the external opportunities in the Opportunities search result page.

The screenshot shows the 'Funding Institutional' search results page. At the top, it displays '15,830 Funding opportunities'. Below this is a table with columns: Title, Funder, Deadline, and Amount. The table lists several opportunities, with two highlighted by orange bars and labeled 'Internal opportunity'.

Selection	Title	Funder	Deadline	Amount
<input type="checkbox"/>	ACS Roy W. Tess award in coatings	American Chemical Society	In 338 days All deadlines	Up to 3,000 USD with total funding...
<input type="checkbox"/>	Graduate certificate program	My University	In 103 days All deadlines	Not specified
<input type="checkbox"/>	Robert Wood Johnson Foundation Health policy fellows	Robert Wood Johnson Foundation	In 47 days All deadlines	Up to 365,000 USD
<input type="checkbox"/>	ASCE Presidents' award	American Society of Civil Engineers	In 338 days All deadlines	Not specified
<input type="checkbox"/>	Impact on management accounting practice award	My University	In 337 days All deadlines	Up to 2,000 USD
<input type="checkbox"/>	2018-19 Community College STEM scholarship program	Virginia Space Grant Consortium	In 164 days All deadlines	Up to 2,000 USD
<input type="checkbox"/>	Ruth L. Kirschstein National Research Service Award (NRSA) Individual predoctoral fellowship	National Institutes of Health	In 164 days All deadlines	Not specified

From this page, click **Open preview** for the brief information or **click the title** to open the full description of the internal opportunity.

The screenshot shows the 'Test Opportunity: New Energy Foundation research grant' page. The page includes the following details:

- Amount:** Not specified
- Upcoming deadline:** Ongoing
- Research Disciplines:**
  - Arts and Humanities
  - Energy
  - History and Philosophy of Science
  - Renewable Energy, Sustainability and the Environment
- Announcement page:** <http://www.infinite-energy.com/whoarewe/grants.html>

**Description:**

As charitable contributions accumulate at New Energy Foundation (NEF), some funds will be assigned to worthwhile scientific research and engineering development projects in new energy. In some cases, specific donor will be approached to fund a particular project, but when possible the NEF R&D grant will be awarded from the general charitable fund.

While our discretionary fund is relatively small, we encourage prospective applicants to apply for funding, because we hope that the growing roster of worthy, approved projects that need to be funded will encourage charitable benefactors to donate. Furthermore, we at NEF need to form a better picture of the quantity and character of quality research in new

If you are an **Admin** or **Editor**, you can also reach internal opportunities from the **Editors** menu, **Internal opportunities** page. Both draft and published Internal opportunities at any status will be listed there.

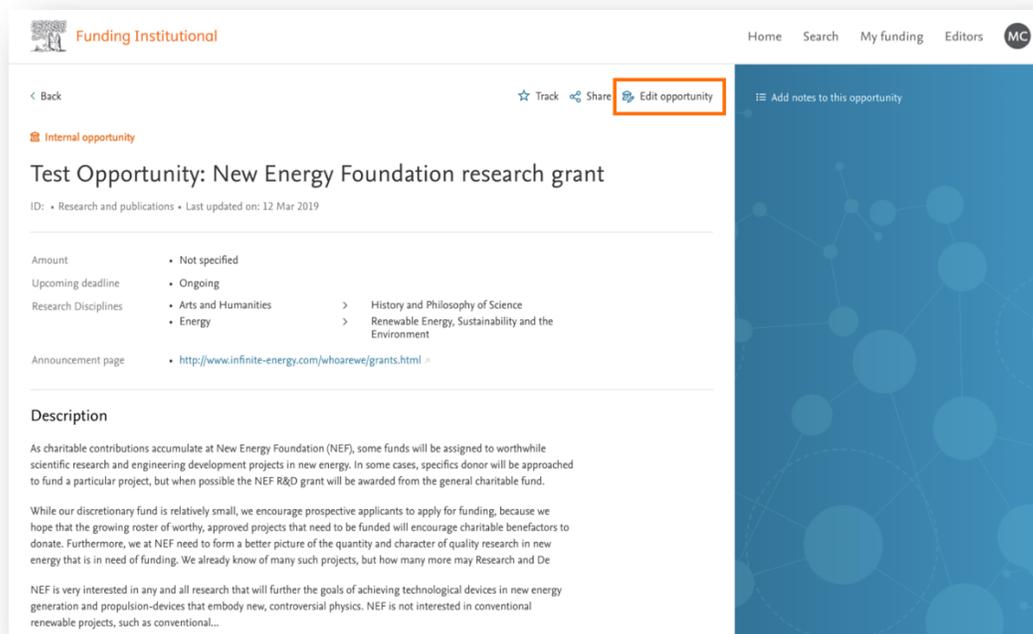
From the **Internal opportunities** list page, you can view the following details of the opportunity:

- title of the internal opportunity.
- Indication as “Missing mandatory details” under the title if the internal opportunity is incomplete.
- Indication as “Deadline overdue” under the title if the deadline of the internal opportunity is passed.
- Name of the research administrator who updated the internal opportunity.
- The date when the internal opportunity is updated.
- Status of the internal opportunity.

### 14.3 EDITING AN INTERNAL OPPORTUNITY

If you are an **Admin** or **Editor**, you can update an internal opportunity. There are two ways that you can open the **Internal opportunity edit form**.

- I. Click **Edit opportunity** button from the Internal opportunity details page.



- II. Click edit button from the Internal opportunities list page.

**Funding Institutional** Home Search My funding Editors MC

**Editors**

Notes

Internal opportunities

**Internal opportunities**

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

2,065 Internal opportunities [+ Create internal opportunity](#)

All 0 selected no draft selected

Title	Last updated by	Last updated on	Status	Actions
<input type="checkbox"/> Test Opportunity: New Energy Foundation research grant 1	Pema Li	12 Mar 2019	Published & active	▼
<input type="checkbox"/> test inactive 2	Sakshi Upadhyay	12 Mar 2019	Published & active	▼
<input type="checkbox"/> test new 3	Sakshi Upadhyay	12 Mar 2019	Published & active	▼
<input type="checkbox"/> name 2000 4 <span style="color: red;">Deadline overdue</span>	Madhurima Chowdhury	12 Mar 2019	Unpublished draft	▼

1. When you click **Edit** icon, the internal opportunity edit form opens. You can edit a draft as well as a published opportunity.
2. You can update all the details of the internal opportunity from the form.
3. For the already published internal opportunity, click **Save**.
4. For the draft internal opportunity:
  - Click **Save as draft** to save changes without publishing the internal opportunity.
  - Click **Publish & make active** to publish the internal opportunity with new changes.
5. The edited internal opportunity automatically comes on the top of the list.

In addition to the edit form, you can change the status of an internal opportunity by selecting the new status from the drop-down menu under the **Status** column of the internal opportunity list page.

**Editors**

Notes

Internal opportunities

All 0 selected no draft selected

<input type="checkbox"/> name 1990 14 <span style="color: red;">Deadline overdue</span>	Madhurima Chowdhury	12 Mar 2019	Unpublished draft	▲
<input type="checkbox"/> name 1989 15 <span style="color: red;">Deadline overdue</span>	Madhurima Chowdhury	12 Mar 2019	Unpublished draft	▼
<input type="checkbox"/> name 1988 16 <span style="color: red;">Deadline overdue</span>	Madhurima Chowdhury	12 Mar 2019	Unpublished draft	▼

## 14.4 DELETING AN INTERNAL OPPORTUNITY

**Admins** and **Editors** can delete an internal opportunity. To delete an internal opportunity, complete the following:

1. From any Funding Institutional page, click **Editors** and then click **Internal opportunities**. Internal opportunities list page opens.
2. From internal opportunities list page, click **Delete** icon to remove the internal opportunity. A confirmation message opens.
3. Click **Delete**.
4. The internal opportunity will be removed from the Funding Institutional.

The screenshot shows the 'Internal opportunities' page in the Funding Institutional system. The page header includes the logo and navigation links: Home, Search, My funding, Editors, and a user profile icon (MC). The left sidebar shows 'Editors' and 'Internal opportunities' selected. The main content area displays a table of opportunities with the following data:

Title	Last updated by	Last updated on	Status	Actions
<input type="checkbox"/> Test Opportunity: New Energy Foundation research grant 1	Pema Li	12 Mar 2019	Published & active	▼ ✎ 🗑️
<input type="checkbox"/> test inactive 2	Sakshi Upadhyay	12 Mar 2019	Published & active	▼ ✎ 🗑️
<input type="checkbox"/> test new 3	Sakshi Upadhyay	12 Mar 2019	Published & active	▼ ✎ 🗑️
<input type="checkbox"/> name 2000 4 <span style="color: red;">Deadline overdue</span>	Madhurima Chowdhury	12 Mar 2019	Unpublished draft	▼ ✎ 🗑️