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1. Introduction

The Funding Discovery module allows for search for funding opportunities or receive targeted recommendations from SciVal Funding to profiled researchers in Pure based on their s and receive potential collaborators suggestions. It also enables research administrators to track the opportunities and help form effective research teams.

Brief overview

Researchers can actively discover funding opportunities by browsing, search or filter among those available. Or the researcher can rely on so-called Fingerprints to discover funding opportunities. A fingerprints is a collection of terms/concepts derived from the researcher's academic content, and is used to match potential funding opportunities. A researcher can create multiple fingerprint profiles, where each can be adjusted to target different opportunity types.

Interesting opportunities can be bookmarked for later or shared with other researchers. For each individual opportunity, more can be explored using filters and recommendations.

Administrators can create filters to share with researchers, configure fingerprint basic settings, setup a review queue for researchers and enrich opportunities with internal deadlines and more.

Note

This is an optional module for Pure and may not be present at this version of Pure. When the module is present an additional workspace-tab is present called “Funding Discovery”.

2. Browser support

Pure is tested for compatibility with the browsers (and their successors) listed in the table below.

<table>
<thead>
<tr>
<th>Browser</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Explorer 8</td>
<td>As of version 5.3/4.22 of Pure Pure will no longer support IE8. IE8 users will from Pure version 5.2/4.21 (released February 2015) be meet with a warning about this in the interface. Users can choose to hide the warning for a month, after which the warning will be shown again. Internet Explorer 7 is not supported anymore. Please be aware, that if you run IE8, 9 or 10 in Compatibility-mode, (which equals IE7) Pure will warn you about that - and further, layouts etc. may be affected by this. To turn the warning off and make sure Pure runs as expected, please run IE without Compatibility-mode.</td>
</tr>
<tr>
<td>Google Chrome</td>
<td></td>
</tr>
<tr>
<td>Mozilla Firefox 5</td>
<td></td>
</tr>
</tbody>
</table>
3. Funding Discovery for researchers

3.1. Browse

Scroll down the listed funding opportunities. By default they are listed with the newest on top.

3.2. Search

Search using relevant terms to locate opportunities that matches the desired.

Note, there is difference in searching with or without " " - For example a search for stem cell will locate more opportunities than a search for "stem cell", but these results may contain either stem or cell and not necessarily stem and cell.

3.3. Filters

Usage of filters can be used to locate opportunities that matches specific characteristics.

A long range of filters can be used in combination. For example to isolate those that matches one or more specific eligibilities. Or have a soon-coming deadline.

<table>
<thead>
<tr>
<th>Filter</th>
<th>Limits funding opportunities to those:</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASJC Classifications</td>
<td>that matches one or more selected ASJC subjects.</td>
</tr>
<tr>
<td>Academic Degree Eligibility</td>
<td>where either a bachelor's, doctor's or master's degree is eligible.</td>
</tr>
<tr>
<td>Award ceiling</td>
<td>with a minimum, maximum or in between amount.</td>
</tr>
<tr>
<td>Bookmarked by</td>
<td>where selected persons has bookmarked them.</td>
</tr>
<tr>
<td>CFDA Classifications</td>
<td>that matches one or more selected CFDA Classifications.</td>
</tr>
<tr>
<td>Concept</td>
<td>that matches one or more selected concepts.</td>
</tr>
<tr>
<td>Deadline</td>
<td>with a deadline after/before/within specific dates.</td>
</tr>
<tr>
<td>Duration</td>
<td>with a minimum, maximum or in between duration in days.</td>
</tr>
<tr>
<td>Eligibility</td>
<td>that matches one or more selected eligibilities, as e.g. only eligible for women or early investigators.</td>
</tr>
<tr>
<td>Funding body</td>
<td>offered by one or more selected funding bodies.</td>
</tr>
<tr>
<td>Funding body country</td>
<td>offered by one or more selected countries.</td>
</tr>
</tbody>
</table>

Table 1. Officially supported browsers

Note

As a general note it is highly recommend to keep all browsers up to date.
### Filters for funding opportunities

<table>
<thead>
<tr>
<th>Filter</th>
<th>Limits funding opportunities to those:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding body specific classifications</td>
<td>offered by funding bodies with one or more selected classification values.</td>
</tr>
<tr>
<td>Funding body type</td>
<td>offered by a specific type of funding body, as e.g. government federal or non-profit</td>
</tr>
<tr>
<td>Funding opportunity type</td>
<td>that matches one or more selected types, as e.g. Conference/Travel Grants or Equipment/Facilities Grants</td>
</tr>
<tr>
<td>Funding profile</td>
<td>that matches funding opportunities matched to selected profiles (other person's funding profiles)</td>
</tr>
<tr>
<td>Limited submission</td>
<td>with or without limited submission, e.g. limited to only one submission per year.</td>
</tr>
<tr>
<td>Shared with</td>
<td>that are shared with one or more selected person's profiles.</td>
</tr>
</tbody>
</table>

**Table 2. Filters for funding opportunities**

The filters can be combined as much as needed and once a filter configuration is found to be very useful, it can be saved using the pin-icon.

**Save filter configuration**

Once a useful filter configuration is setup, it can be saved using the pin-icon next to added filters. Save by giving the filter configuration a fitting name. See below.

It can then be activated by clicking on name of it. The number is dynamically updated so every time some content fits into the filter configuration, the number will increase.

If the filter configuration is not needed anymore, delete it from the menu by clicking on the x next to the number.

Saved filters are located in both the left menu and in the menu present below search field for easy access.

![Location of saved filters](image)

**3.3.1. Shared filters**

Administrators can share filters and make them available for researchers.
For each shared filter, there is a list of which filters it includes, who has shared it and from which date. The filter can then either be added to the researchers profile or removed again.

Once added it is available from either the left menu or from above the listed funding opportunities (as with other self defined filters).

**Related information**

- Section 7.2. Share filters

### 3.4. Create Fingerprint from pasted text

It is possible to fingerprint a pasted piece of text to match funding opportunities.

This option is useful if there’s an abstract from a not currently present in Pure, and it still is desired to use this for funding opportunities.

The text can be re-edited by clicking on the fingerprint icon again.

### 4. Funding profile
4.1. Fingerprint

A Fingerprint is an index of weighted terms, visualised according to their weight, and is build from a back-end software system, the Elsevier Fingerprint Engine.

It mines the text of scientific documents – publication abstracts, funding announcements and awards, project summaries, patents, proposals/applications, and other sources. This creates the index of weighted terms which defines the text, known as a Fingerprint™ visualisation. Terms are known as Concepts in Pure.

The Elsevier Fingerprint Engine creates Fingerprints via a three-step process:

1. The Elsevier Fingerprint Engine applies a variety of Natural Language Processing (NLP) techniques to mine the text of scientific documents including publication abstracts, funding announcements and awards, project summaries, patents, proposals, applications and other sources.

2. Key concepts that define the text are identified in thesauri spanning all the major disciplines.

3. The Elsevier Fingerprint Engine creates an index of weighted terms that defines the text, known as a Fingerprint.

In Pure Fingerprints are created for researchers and organisational units. A fingerprint on is also available, but it will only reflect the mined metadata.
Figure 5. A fingerprint example for a researcher. Each concept is weighted and matched against a thesaurus, here MeSH.

Terms can be sorted against their rank (weight) or by A-Z - if the thesaurus allows it, also by semantic grouping.

By aggregating and comparing Fingerprints, the Elsevier Fingerprint Engine enables institutions to look beyond metadata and expose valuable connections among people, publications, funding opportunities and ideas.

Covering a wide range of subject areas with a collection of thesauri The Elsevier Fingerprint Engine uses a variety of thesauri to support applications pertaining to different subject areas. By applying this wide range of thesauri, Elsevier can develop solutions for researchers in but not limited to: the life sciences, engineering, earth and environmental sciences, arts and humanities, social sciences, mathematics and agriculture. Thesauri provided by the institution can also be incorporated.

Related information
• Section 4.2. Funding profiles

4.2. Funding profiles

Researchers can match opportunities based on one or more funding profiles.

Figure 6. This researcher has two profiles and for each the number of opportunities is listed. Clicking on each will list the opportunities.
Related information

- Section 4.1. Fingerprint

4.3. Create / edit funding profile

From the profiles menu a new profile can be created or an existing can be modified.

Figure 7. Edit existing or create new funding profile.

From the menu the researcher can either edit the existing one or create a new funding profile. A new profile will be added next to existing ones as illustrated above. (PAJ profile)
Figure 8. Funding profile settings.

<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Name of profile</td>
<td>Used to identify this specific profile. If not needed for a period it can be hibernated.</td>
</tr>
<tr>
<td>2 - Fingerprint</td>
<td>Default is all research outputs from the past 5 years, which will be mined and analyzed by the fingerprint engine. Result is displayed below, for each taxonomy. Unwanted terms/concepts can be removed by hovering the mouse on each and press remove.</td>
</tr>
<tr>
<td>3 - Limitation of fingerprint</td>
<td>Use filters to specify fingerprints to the selected. These may be predefined by Administrators, but can be changed anyway.</td>
</tr>
</tbody>
</table>
### 4.4. Share settings

If a researcher does not want to allow other researcher to share funding opportunities with him/her this can be set to "Off".

Thereby the researcher can not be selected when researchers wants to share opportunities with others.

If the researcher has multiple funding profiles, this setting will be affect all.

![Image showing settings](image)

**Figure 9. This researcher disallows that funding opportunities can be shared with him.**

### Related information

- Section 5.1. Share opportunities

### 4.5. E-mail settings

Researchers can select which e-mails to receive and with which frequency.

This setting is found in the user profile in the top right corner. Click the [ User name ]-button, found next to the [ Log out ]-button

**Funding profile matches**

E-mail is sent when new matches to a researchers profile are found.

**Shared by other users**

When another researcher shares a specific funding opportunity, you will receive an e-mail with a notification on this.

Values for both settings are either Never (Log in to Pure to check), Instantly or as a periodical digest with a summary for the period selected, e.g. weekly, monthly.
Figure 10. E-mail settings. Select which e-mails you want to receive and the frequency.

5. Funding opportunity details

A funding opportunity contains a variety of information for researchers.

Figure 11. Details on a funding opportunity.

<table>
<thead>
<tr>
<th>Number - area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Link and description</td>
<td>Follow link or expand description area if text is missing. Any comments from administrators will also be found here.</td>
</tr>
<tr>
<td>Number - area</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>2 - Information on funder</td>
<td>Links can be followed. For example, clicking on “Denmark” will list all opportunities from Denmark.</td>
</tr>
<tr>
<td>3 - Eligibility requirements</td>
<td>Requirements that must be fulfilled before funding opportunity should be used.</td>
</tr>
<tr>
<td>4 - The opportunities fingerprint</td>
<td>This is used when matching researcher’s funding profiles.</td>
</tr>
<tr>
<td>5 - Deadline for application</td>
<td>Note, a local deadline can be added as well. See below table.</td>
</tr>
<tr>
<td>6 - Bookmark or dismiss this opportunity</td>
<td>Save for later.</td>
</tr>
<tr>
<td>7 - Share this opportunity</td>
<td>Select one or more researchers to share this opportunity with.</td>
</tr>
<tr>
<td>8 - Similar opportunities</td>
<td>Discover more. This can either be opportunities that are similar or potential collaborators with a matched fingerprint profile.</td>
</tr>
<tr>
<td>9 - Help</td>
<td>Details for contact on further assistance to this opportunity.</td>
</tr>
</tbody>
</table>

*Table 4. Description details for illustration above.*

**Internal deadline and comments**

Administrators can set an internal deadline prior to the given in order to be able to complete the application and take care of details. When doing so, a comment can be added, for example to pay attention to this.

![Internal deadline set with comment](image)

*Figure 12. An internal deadline has been set with a comment on this.*

### 5.1. Share opportunities

An interesting opportunity can be shared with fellow researchers.
Figure 13. Sharing a funding opportunity with fellow researchers.

When sharing has been selected, search for and add researchers to share with. Notice, that researchers can select to not receive share suggestions, as illustrated above.

Figure 14. A shared opportunity as it will show for the researcher it has been shared with.

Related information

• Section 4.4. Share settings

5.2. Bookmark opportunity

When a relevant funding opportunity has been located, it can be bookmarked for later investigation.

Simply use the bookmark icon to add/remove from the bookmarks.
5.3. Dismiss opportunity

When a non-relevant funding opportunity has been located, it can be dismissed and thereby not be available for the researcher anymore.

Simply use the dismiss icon to do this as illustrated below.

---

**Note**

When an opportunity is dismissed it can not be undone again, once it has disappeared from the view.

6. Get help

Researchers can get help or assistance from editors and administrators of funding opportunities.
7. Funding Discovery for administrators
7.1. Administrators overview

Editors and administrators of funding profiles can see how many researchers and their funding opportunities they are in charge of. They also need to help researchers in need for assistance.

Figure 19. Key information for editors and administrators of funding opportunities.

<table>
<thead>
<tr>
<th>Number</th>
<th>Description / task</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Number of persons with a funding profile</td>
<td>The funding profile is present. Next would be to check if matches are within defined range. See 2)</td>
</tr>
<tr>
<td>2 - Number of persons where matched opportunities falls outside the defined range. Red numbers.</td>
<td>Either check the range is fine or adjust funding profile. If numbers are too low it may be required to fingerprint more material - if the number is too high the fingerprint may be adjusted to match more precisely.</td>
</tr>
<tr>
<td>3 - Number of persons without a funding profile</td>
<td>Create a funding profile to start matching funding opportunities.</td>
</tr>
<tr>
<td>4 - Number of persons with help requests on the funding profile(s)</td>
<td>Click on the actual funding profile and inspect help request.</td>
</tr>
</tbody>
</table>

Table 5. Description details for illustration above and below.

Figure 20. Where to go to inspect numbers from illustration above.

All columns can be sorted in ascending / descending or alphabetic order. Their individual order can be changed by dragging the columns left or right.

Clicking on the numbers for each will give a listing of the funding opportunities.
Related information

• Section 7.5. Funding discovery configuration

7.2. Share filters

Filters can be shared by administrators when saving the filter configuration.

Pressing the [Save + Share] will both save it as a filter and make it available as a filter to add for researchers.

Figure 21. How to save and share a filter configuration.

Once the filter has been saved and shared, it can be stopped from sharing again.

Figure 22. Location of shared filters.

Related information

• Section 3.3.1. Shared filters

7.3. Favourite funding opportunities

Editors and administrators of funding opportunities can mark funding opportunities as favourites which allows them to revisit these at a later time.

Favourites are marked by clicking on the sign. It will then become available in the right menu. Clicking on this will list the favourites. Click again to remove from favourites.
7.4. Funding details - Administrators

Administrators can inspect funding opportunities for matched profiles, bookmarks and shares. And provide them with a comment for the researchers and an internal deadline.
Figure 24. Details on a funding opportunity for Administrators.

<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Set internal deadline or add a comment</td>
<td>This may be useful when there's a need for a deadline prior to the official for preparing documents etc. A comment can also be added for the researchers.</td>
</tr>
<tr>
<td>2 - Matched to</td>
<td>See how many person's funding profiles that matches this opportunity</td>
</tr>
<tr>
<td>3 - Bookmarked</td>
<td>See how many researchers have bookmarked this opportunity</td>
</tr>
<tr>
<td>4 - Shared</td>
<td>Share this with selected researchers or see who have shared this.</td>
</tr>
<tr>
<td>5 - Favourite</td>
<td>A shortcut to adding this as a favourite.</td>
</tr>
</tbody>
</table>

Table 6. Details on a funding opportunity for administrators.

7.5. Funding discovery configuration

Set default settings for all person funding profiles and fingerprints and general settings for the module.

Funding profile for researchers

Enable / disable an automatic setup of a default funding profile for all researchers.

Fingerprint

Define what content that should be used to create the fingerprint.
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content year range</td>
<td>Use data from the past 5 years as default.</td>
</tr>
<tr>
<td>Include content types</td>
<td>Currently only</td>
</tr>
</tbody>
</table>

Table 7. Settings for fingerprints

**Review queue**

Flag researchers whose funding profile match too many or too few opportunities and should be reviewed by an editor funding opportunities. So, if a researcher has fewer/more matches than those defined, this will be flagged for the editor and he/she could then review the setup of the profile to adjust it for better matching.

Limit the fingerprint matches to these areas

Researchers will be able to adjust the filters on their own. This setting selects default values for researcher's funding profiles. The researchers can override the default settings if needed.

<table>
<thead>
<tr>
<th>Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding bodies</td>
<td>Limit to one or more funding bodies.</td>
</tr>
<tr>
<td>Funding body country</td>
<td>Limit to one or more funding body countries</td>
</tr>
<tr>
<td>Opportunity type</td>
<td>Limit to one or more opportunity types</td>
</tr>
</tbody>
</table>

Table 8. Default filters to present for researchers upon creating funding profiles.

**Module visibility**

<table>
<thead>
<tr>
<th>Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visible to researchers</td>
<td>Enable / disable access to Funding discovery</td>
</tr>
<tr>
<td>Enable funding profile e-mails</td>
<td>Enable / disable. If enabled, the default frequency for e-mails can be adjusted. Researchers can change this in their own user profile.</td>
</tr>
</tbody>
</table>

Table 9. Visibility options

**Global message**

Select the bottom text for funding details. See example below:

Figure 25. Global message displayed at all funding opportunities.
Help settings

Researchers can ask for help from their funding profiles. Select if this help request should be appointed the editors of funding discoveries or a general help e-mail inbox. If so, the e-mail-address to use must be specified.

Related information

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