# Table of Contents

1 The administrative user........................................................................................................2
   1.1 Logging in ..................................................................................................................2

2 Background info...........................................................................................................3
   2.1 Funding opportunities in Pure..................................................................................3
   2.2 Elsevier’s SciVal Funding database .......................................................................4
   2.3 Elsevier’s Fingerprinting technology ......................................................................4
   2.4 Pure’s Funding Discovery module ...........................................................................5

3 How to .......................................................................................................................5
   3.1 Academics ................................................................................................................5
      3.1.1 Fine-tuning a profile .........................................................................................7
   3.2 Administrators .........................................................................................................12
      3.2.1 Editing a personal user’s funding profile or profiles .......................................14

4 Further support..........................................................................................................16
Funding Discovery

1 The administrative user

This module guide offers a quick introduction for administrative users ("sys admins"), and explains how the Funding Discovery module for Pure works.

<table>
<thead>
<tr>
<th>Pure module guide info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Module guide no.</td>
</tr>
<tr>
<td>Modules</td>
</tr>
<tr>
<td>Feature addressed</td>
</tr>
<tr>
<td>Version</td>
</tr>
<tr>
<td>Date</td>
</tr>
<tr>
<td>Last updated</td>
</tr>
<tr>
<td>User profile</td>
</tr>
</tbody>
</table>

### 1.1 Logging in

To log in, use the username and password which has been emailed to you. If you do not yet have your own system admin credentials, please speak with your Elsevier contact from the Operations or Implementation team.

**NB:** Your Pure system may be set up with an **internal authentication system** such as an LDAP server, Active Directory, Shibboleth, Kerberos, or similar systems. If this is the case, the log-in procedure may differ from the below.

1. Enter your credentials
2. Click “Login”

**NB:** When you log into Pure for the first time, you may see a **welcome screen** asking you to accept terms & conditions and giving you other information. This welcome screen will be set up by your system administrator for legal or practical reasons. Read it, click as appropriate, and continue.

The login screen will look like this:
2 Background info

2.1 Funding opportunities in Pure

A “funding opportunity” in Pure is a record with information about funds available for application. It contains details about the funder, the funding programme, deadlines, award ceiling, eligibility information, and more.

Some owners of Pure find it useful to include funding opportunities in their system to let researchers discover new opportunities, for compliance with internal bidding policies, for other administrative purposes, and more. If you do not have such a need, however, there is no reason to populate the system with funding records. However, if you do need funding opportunities to appear within Pure, this can be achieved in two ways:

1. Without the Funding Discovery (FD) module
2. With the FD module

If you don’t use the FD module, users can create funding opportunity records in Pure by manually typing them in. Currently, there is no way to import opportunities from 3rd party providers. Once users have entered opportunities into the system, they are visible to the community of researchers using Pure, who can now browse, search and filter to discover them. Funding opportunities can be linked to grant applications and awards, and, therefore, also to outputs like publications and datasets. This allows you to track individual research cycles all the way back to the original funding opportunity.
If you do use the FD module, funding opportunities in Elsevier's SciVal Funding database will automatically be available in Pure. Additional functionality will also be available - key among these is pro-active pushing of opportunities to researchers to increase the discoverability of opportunities and to drive application rates up, among others. See more below.

NB: This guide provides system administrators and similar high-level users an overview of Pure's Funding Discovery module, including its features.

There is no guide available for using opportunities in Pure without the Funding Discovery module. However, the process is very straight-forward: Give one or more users the role of “Administrator of funding opportunities” so that they can enter funding opportunities. These and other users can now see the opportunities. “Opportunities” is a reportable type of content in Pure that works the same way as other record types.

2.2 Elsevier’s SciVal Funding database

Pure FD module uses opportunities from Elsevier’s SciVal Funding database - a global database of funding opportunities. Pure’s use of this data saves you the time and effort of populating your system with opportunities in alternative ways.

If you have the FD module:

Users will see opportunities from SciVal Funding. These are visible in Pure’s user interface, but until a user does something with a specific opportunity – creates an application for it, notifies a colleague about it, etc. – it is not stored in Pure. Only when action is taken on the opportunity will it be turned into a record in Pure.

When you have the FD module, users can also create their own opportunities in Pure. These will be automatically created as records.

NB: Elsevier’s SciVal Funding database has limited coverage in some regions. Before considering this module, please talk with your Elsevier contact about the concrete coverage in your region to ensure that the FD module will meet your needs.

2.3 Elsevier’s Fingerprinting technology

Elsevier’s Fingerprinting technology uses advanced text mining to analyze English-language scientific abstracts and extract weighted scientific subject area keywords to accurately describe the record. The cloud of weighted subject area keywords is referred to as a “fingerprint” and the individual keywords in the fingerprinted are referred to as individual “concepts”.

Pure incorporates this technology to create fingerprints for each of the following types of records:

- Researchers
- Funding opportunities
- Grant applications
- Awards
- Projects
- Equipment

Fingerprints are a valuable tool for a number of scenarios: to increase discoverability when showcasing research on the open web, to increase ranking in organic search results, to improve internal searching and reporting, and more. Elsevier’s Fingerprinting technology is also used for improved use of funding opportunities in Pure.

See more in the how to section.
Fingerprinting is algorithmic matching, meaning that it is done by a computer. Therefore, a small percentage of the matches may be incorrect. It can be helpful to set your users’ expectations accordingly: they are bound to find some of the suggested opportunities to be not relevant to their interests.

### 2.4 Pure’s Funding Discovery module

If you require funding opportunities to be included in your Pure system, and if SciVal Funding’s coverage meets your needs, Pure’s Funding Discovery (FD) module offers the following benefits:

A. Academics can access all of Scival Funding’s global opportunities
B. Academics have advanced browsing and searching capabilities, including “paste your own abstract”
C. Academics automatically receive suggested opportunities based on fingerprint matches
D. Academics can suggest opportunities to colleagues
E. Academics can begin the internal application approval process with a single click
F. Academics can see similar funding opportunities on each opportunity record
G. Admins\(^1\) can create ad-hoc lists of opportunities with advanced search and filtering
H. Admins\(^1\) can support users with matched opportunities
I. Admins\(^1\) can see an overview and track use of the FD module and user behavior

The following section will help you and your academic users get started using the Funding Discovery module.

### 3 How to

#### 3.1 Academics

When the personal user (researcher) logs into a Pure system with the Funding Discovery (FD) module installed, the “Funding discovery” tab will be available (see Figure 2 below).

When the user clicks “Funding discovery”, they will see all funding opportunities that were matched to their profile. The user can now browse, search, filter, list, and sort to discover opportunities. During such explorations, the user can dismiss opportunities or bookmark them for later. All of this can be done without opening an individual record.

When opening a record, the user can again dismiss the opportunity or bookmark it for later, and they can share the opportunity with colleagues. Individual opportunity records automatically show similar opportunities and potential internal collaborators; i.e. researchers that also match this particular opportunity.

NB: If no opportunities were matched to the user, they will see all funding opportunities.

\(^1\) Either full system administrators or any user with the role “Editor of funding opportunities.” The latter option makes it possible to make someone – for example, clerical staff at the department level or at a central funding office – responsible for helping academics handling funding opportunities.
Figure 2 – “Funding discovery” tab

Figure 3 – Personal user’s individual list of matched funding opportunities. Note the options to browse, search, filter, list, and sort to discover opportunities and to leave the matched list to access the full list.
3.1.1 Fine-tuning a profile

Researchers can also fine-tune their own profiles. This is done by clicking the black arrow under “Default profile” in the upper left corner and then clicking “Edit funding profile”.

Researchers can have multiple funding opportunities profiles. The first option is to change the name of the profile to a custom name. After that, it is possible to edit the fingerprint which underlies the profile. Here, it is possible to augment concepts in the fingerprint and to edit the fingerprint in general. When editing the fingerprint, it is possible to set the fingerprint to go longer or shorter back in time.

The researcher can also limit their fingerprint to specific areas: Funding body countries, funding opportunity types, eligibility, and specific funding bodies.
Figure 5 – Opening the funding profile for editing. The researcher can also create multiple funding profiles

Figure 6 – Editing the funding profile (pt. 1)
Figure 7 – Editing the funding profile (pt. 2)

Figure 8 – Setting the base period for the underlying fingerprint
Adding restrictions to the fingerprint is an important way for researchers to optimize results they get from the FD module. The screenshots below show some selected options:

Figures 9 & 10 – Optimizing results by limiting on opportunities from specific countries or by certain opportunity types
Figure 11 – Optimizing results by limiting on eligibility criteria

Figure 12 – Optimizing results by limiting on opportunities from specific funders
NB: Remember that the fingerprinting underpinning the FD module’s matching services is based on algorithmic operations, which always means that bad matches will occur. As a system administrator for Pure, we recommend that you inform your academic users of this fact, setting their expectations correctly. You might explain that algorithmic matching is perceived as far better than no matching by most academics, which also is the view behind your institution’s decision to offer this service. If an individual is opposed to this view, it is very easy for them to modify the service, to switch off fingerprinting, or to switch off the service entirely – all as illustrated above.

3.2 Administrators

When an administrative user logs into a Pure system with the Funding Discovery (FD) module installed, the “Funding discovery” tab will be available in the main menu in the same way as it was for the personal user. See Figure 2 p. 6 above.

When the administrative user clicks “Funding discovery”, they will see a list of all funding opportunities – not a list limited to personally matched opportunities. It looks like this:

![Image of Administrator's list of funding opportunities in Pure's FD module]

The administrator is informed that they are the editor for a number of users with a funding profile (see the text just above the search field in the screenshot above).

Being an editor for a person with a funding profile gives the ability to help and support that person with funding opportunities. This role is called “Editor of funding opportunities” and is usually given to a small group of people responsible for helping academics with funding opportunities; for example, a team of clerical staff at the funding office. The role can be limited by department, which makes easy to set up funding support specifically as needed across campus.

The administrator with this role can access a list of the persons whom they are supporting by clicking the person icon on the “Funding opportunity” tab:
The list itself looks like this:

Figure 14 – Click to access the list of persons that you support with funding opportunities

Figure 15 – List of persons (academics) that an admin user with the role “Editor of funding opportunities” supports
This list allows the administrator to view all personal uses with funding profiles for whom they are responsible. The cog in the upper-right corner allows the administrator to select which columns are visible, and it is possible to sort the list by each of the column headers.

The column called “Bookmarked” shows the number of funding opportunities that the individual user bookmarked themselves. The column called “Shared” shows the number of funding opportunities that other academic users have shared with this user. Finally, the column called “Help requested” shows if the user has requested help from you, the administrator. Click the comments to see the request.

Click the name of the personal user to see the standard person profile, or click the number of matches to see the user’s list of matched funding opportunities.

Try all of these options out; play around with them, and see how they work.

### 3.2.1 Editing a personal user’s funding profile or profiles

As the administrator or the editor of funding opportunities, you have the option to modify the default funding profile for your users; you can also create a new funding profile for them. **This feature is highly useful for administrators within funding offices: it allows them to assist, support, and guide academic users towards more fruitful funding applications.**

Clicking “Default profile” on a user in the list allows you to edit the funding profile for that user:

In this screen, you can edit the personal user’s profile in the same way that the user can themselves. You can edit the fingerprints that the profile is based on, and switch them on or off. You can also limit the profile to certain areas like country, funder, illegibility, and more.

You can also create a new funding profile for your user. It is possible for academics to have multiple funding profiles – this may be necessary when they work in multiple scientific areas, for example, and seek funding in both.

To create an additional funding profile for a user, click the button “Create funding profile” on that user’s line in the list. You will see this screen:
Figure 17 – Creating a second funding profile for a user. Start by giving it a name, then set options, then save.

Save the second profile when you have finished setting it up. Your list of users will now look like this:
Figure 18 – Your list of users, now showing user “Robertson, Chris” with two active funding profiles

4 Further support

We hope this short introduction has helped you to get started with funding opportunities. We encourage you to contact your Elsevier Account Manager or Customer Consultant if you need further assistance.