Research Professional: funding search guide

This guide is aimed at researchers and research support staff who would like to set up tailored funding searches on ResearchProfessional.com. It includes examples of how best to search, potential pitfalls to avoid, and screenshots of popular searches you may adapt for your own purposes.

This document should be read in conjunction with our quick start guide, which gives a basic overview of the system and information on logging in, setting up email alerts, saving, sharing and printing funding opportunities.

All Research Professional guidance can be found at researchsupport@admin.ox.ac.uk/funding/rp

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1. How best to search

We recommend you start searching by discipline, ideally in combination with other criteria. You can search for very specific discipline terms in both the simple search and advanced search. If you are just intending to search by discipline or funder you can do this in the simple search. For better, more effective searching, we recommend the advanced search, where you can combine search criteria and decide how specific your search results should be.

Simple search

Just type in your search term and choose the tag that best suits your search. Don’t choose ‘Free text’ as you will get less well-matched results.

Click **Search**

Advanced search (recommended)

The advanced search gives you a comprehensive search interface in which you can easily combine all search criteria available by just clicking on important search terms, such as Discipline, Award type, Funder, Award amount and Closing date. You can also search by Nationality of researcher (under the ‘More options’ drop-down menu).

We recommend you first get started with Discipline and then add Award types if applicable.

Click on **Discipline**, type in your keyword and hit **Search** Choose your keyword(s) from the automatically suggested keyword prompts. In the example screenshot below, we choose ‘Cancer Cell Biology’.

**Note**

If you hover over the keywords you can see how they have been indexed in the system, e.g. “Cancer Cell Biology” is indexed as follows:

Bio/Medical > Medicine & Health > Clinical Medicine > Cancer Studies & Oncology > Cancer Cell Biology
Broadening or narrowing your discipline searches: ‘Exactly’, ‘Generally’, ‘Advanced’ options

When you set up a discipline search, the default is to search for funding opportunities indexed exactly at the level of that discipline (in this example, ‘Cancer Studies & Oncology’).

However, in the advanced search you can also choose to broaden or narrow your search by clicking on the ‘Edit’ icon in the ‘Discipline’ line, then ticking the relevant boxes next to ‘Match these disciplines’ under the ‘Advanced’ radio button (see screenshot below).

- You can choose any combination within the advanced option.
- The radio button ‘Generally’ will give you the same results as choosing ‘Exact matches’ and ‘Broader matches’ and ‘Narrower matches’.

Examples

Level 1 (hub) discipline terms: if you search for a top-level term in the index (eg ‘Social Sciences’), you can choose to receive funding opportunities matched at the following levels:
- Broader matches: the discipline ‘Any’ – funding opportunities that are relevant to all disciplines (Level 0)
- Exact matches: all ‘Social Sciences’ matches (Level 1)
- Narrower matches: all of the sub-terms of Social Sciences in the index

Level 2/Unit of Assessment terms: if you search for a lower level term on the index (eg ‘Law’), you can choose to receive funding opportunities matched at the following levels:
- Broader matches:
  - the discipline ‘Any’: funding opportunities that are relevant to all disciplines (Level 0)
  - all ‘Social Sciences’ matches (Level 1)
- Exact matches: all ‘Law’ matches (Unit of Assessment terms)
- Narrower matches: all of the sub-terms of ‘Law’ in the index (Levels 3, 4, 5, etc).

Lower-level discipline terms: if you search for lower-level terms on the index (eg ‘Legal Reform’), you can choose to receive funding opportunities matched at the following levels:
- **Broader matches:**
  - the discipline ‘Any’: funding opportunities that are relevant to all disciplines (Level 0)
  - all ‘Social Sciences’ matches (Level 1)
  - all ‘Law’ matches (Level 2)
  - all ‘Legal Theory’ matches (Level 3)
- **Exact matches:** ‘Legal Reform’ (in this case, this is the lowest term at Level 4)
- **Narrower matches:** No narrower matches, as there are no sub-terms underneath Level 4 in this particular case on the index. However, other discipline terms may have up to six or more levels.

Broad searches will generally give you much less well-matched results, but can still be useful if you then narrow them down by various criteria. They will give you a very broad picture of what funding opportunities are available in your chosen discipline.

Narrow searches will give you very specific and hence far fewer results, but will miss out general funding opportunities that you may be eligible to apply for. For example, only searching exactly for a low-level term ‘Legal Reform’ will miss many general opportunities that are indexed under ‘Social Sciences’, ‘Law’, and ‘Legal Theory’ which researchers could still be eligible for.

Now you can refine your advanced search by clicking on, for example, **Award type, Funder, Nationality of Researcher** (under ‘More Options’) and/or **Closing date**.

**Adding time-based criteria to advanced searches (eg closing date and/or no deadline)**

In any advanced search you can also add a limit for the deadline by clicking on the **Closing date** tab (eg ‘Close after 30/11/2016’). This will, however, exclude any opportunities without deadlines, so you need to add another criterion: ‘Do not have a deadline’ if you wish to see open-ended funding opportunities as well.

You can also choose from other closing date options.

![Closing date](image.png)

**Combining search criteria**

You can combine as many search criteria as you need, bearing in mind that you will get more refined (ie fewer) results the more criteria you add.

**Choose an option to search by**

- **All text**
- **Discipline**
- **Award type**
- **Funder**
- **Closing date**
- **Award amount**
- More options
To add more criteria, simply click on the options to search by. Start for example with **Discipline**, and after having chosen your discipline keyword(s), simply click on other criteria, eg **Award type, Funder, Closing date**, or **Award amount**. Once you click on any of these buttons, a pop-up menu will appear. In the **Discipline** menu you first need to type in the discipline keyword you are looking for and hit ‘Search’, then choose your keyword(s) from the automatically suggested keyword prompts and click ‘Update’. In **Award type**, you simply tick the award criteria you are looking for.

You can also choose from the ‘More options’ menu to add other criteria, eg **Nationality of researcher** or **Country of funder**. **Funder involvement** allows you to search specifically for opportunities that provide funding to applicants from our institution’s country (as opposed to ‘participation only’ opportunities).

**Match all criteria vs. Match any criteria**

- ‘**Match all criteria**’ in the advanced search is selected by default. In the example above, you are searching for funding opportunities that have been indexed with all of the discipline and funder keywords on the system. This means that your search results will be quite refined (ie only history opportunities from the AHRC in the example above).

- ‘**Match any criteria**’ in the above example would give you any results for history as well as any funding opportunities from the AHRC, irrespective of discipline.

**‘Is any of’**

If you have selected more than one discipline keyword, the default is to look for anything that matches **either** keyword.

**‘Is all of’**

If you have selected more than one discipline keyword, you can also choose to search for only those funding opportunities that **both** keywords apply to. This would give you far fewer results, as not many funding opportunities are indexed with exactly those two disciplines you search for.

**‘Is not any of’**

If you have selected more than one discipline keyword, you can also choose to search for only those funding opportunities that **both** keywords apply to. This would give you far fewer results, as not many funding opportunities are indexed with exactly those two disciplines you search for.
In the example above you are not interested in receiving any grants offered by the AHRC, but you will receive anything else tagged with your chosen discipline keywords.

You can also exclude other criteria, but don’t exclude any award type keywords as you will lose funding opportunities that have been indexed with more than this particular award type.

**Avoid Full text/All text searches**

Searching by discipline will always return a higher number of better tailored results than a Full text/All text search. Please don’t rely on full text searches but use the **Discipline** keywords instead. You can filter your discipline searches by text if necessary.

**Sorting your search results**

Once your search is finalised, you can sort your search results, for example by funder country or closing date.

You can then save your search so you can re-run or amend in the future.

### 2. Dos and don’ts

- **Don’t use ‘All text/ Free text’ as your only search criteria.** You will receive much less well-matched results.

- **Do set up at least a couple of different searches and compare their results before turning them into email alerts, so you know you get well-matched results every time.** If you get few results, consider broadening your search.

- **Don’t set up email alerts from searches with time-based criteria** (eg closing date within 90 days) as you will get very few (if any) results in your weekly email alert.

- **If you search by Closing date but also want to see funding opportunities with no fixed deadline, do add the criteria Closing date > Do not have a deadline.**

- **Don’t exclude by Award type, ie don’t use the operator ‘is not any of’ with any Award types.** *(Example: Award type = ‘Mid-career fellowships’ and another Award type ‘is not any of’= ‘Travel’ will exclude those awards listed with both mid-career fellowships and travel.)*

- **Do keep your searches as simple as possible.**
4. Example searches you can adapt for your own purposes

All examples below give you basic search criteria to get you started. Please see Section 1 for more information on how to refine your search, for example how to broaden or narrow your search by discipline and how to add time-based and other criteria.

Make sure that you click ‘Update’ in your criteria screen after adding each new search criterion. Having added your search criteria, update the whole search by clicking on Search.

Once your search is finalised, you can sort your search results, eg by funder name or closing deadline. You can then save your search so you can re-run or amend it in the future.

For information about setting up email alerts, saving, sharing and printing funding opportunities, please see our quick start guide.

Key funders and discipline

In the following advanced search example, we choose some funders by clicking on the Funders tab, typing in the funder’s name or acronym, and clicking ‘Search’ and ‘Update’. Next, we add the discipline ‘Social Sciences’ by using the Discipline tab.

Choose an option to search by

<table>
<thead>
<tr>
<th>All text</th>
<th>Discipline</th>
<th>Award type</th>
<th>Funder</th>
<th>Closing date</th>
<th>Award amount</th>
<th>More options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funder</td>
<td>is any of</td>
<td>Economic and Social Research Council, GB</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discipline</td>
<td>is any of</td>
<td>Social Sciences</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

☐ Show me opportunities that are closed ☑ Match all criteria ☑ Match any criteria

Search

PhD/DPhil funding

Research Professional has only a limited number of PhD funding opportunities (most of its funding opportunities are at postdoctoral level). Depending on the funder, it is still sometimes possible for senior academics to apply for a standard or student-linked grant that includes a PhD/DPhil studentship. You may in the first instance want to check the relevant funder’s guidance for further information and contact your departmental administrator or research facilitator for further guidance.

In this example we search for PhD/DPhil funding indexed with the term ‘Engineering’ in the advanced search. Add the Discipline ‘Engineering’. You can then add the Award types most relevant to your situation, eg ‘Thesis/Dissertation funding’, ‘Financial aid for postgraduate students’, ‘Student awards’, ‘Studentship allocations’, possibly also ‘Predoctoral fellowships’, ‘Predoctoral training fellowships’.

Research Professional will give a detailed explanation of any award types if you hover over the award terms with your cursor.
Early career funding

In the following example, we search for funding for early career researchers in the Social Sciences. To do this, we first need to select the Advanced search option from the Funding menu on top of the screen and then select Award type as our first search criterion.

We then add the following award types, including the award type ‘Early-Career fellowships’. Research Professional will give a detailed explanation of any award types if you hover over the award terms with your cursor.

We can then add a discipline (in the example below, ‘Social Sciences’) by clicking on Discipline.

Mid-career and/or senior funding

In the following example, we search for funding for mid-career researchers in the Arts & Humanities. To do this, we first need to select the Advanced search option from the Funding menu on top of the screen and then select Award type as our first search criterion. Research Professional will give a detailed explanation of any award types if you hover over the award terms with your cursor.

We then add the following award type(s):

We can then add a discipline (in the example below, ‘Arts & Humanities’) by clicking on Discipline.
Travel funding

In the following example, we search for travel funding in History. To do this, we first need to select the **Advanced search** option from the **Funding** menu on top of the screen and then select **Award type** as our first search criterion. Research Professional will give a detailed explanation of any award types if you hover over the award terms with your cursor.

We add all of the following award types: ‘Travel for research purposes’ and ‘Travel to conferences, meetings, etc’.

We can then add a discipline (in the example below, ‘History’) by clicking on **Discipline**.

**Note:** We could also include particular countries of funders by selecting the ‘More options’ drop-down list and selecting ‘**Country of funder**’.

**EU funding**

To look for EU funding, we select **Country of funder** from the ‘More options’ drop-down menu, and select ‘European Institution (ie ESA, ESF, European Commission & others affiliated to the EU or the idea of Europe)’.
We can then select the Discipline, eg ‘Environmental Studies’. Many EU funding opportunities are open to any discipline, so while we can restrict our advanced search by our chosen discipline, we don’t want to miss out on general funding opportunities that are open to any disciplines.

We may want to initially select ‘Match these disciplines’>‘Generally’, as a broader search will get us more funding opportunities.

We may then want to narrow the search down further by award type, eg ‘Networking/Collaboration’.

Note: for Oxford-specific guidance on European funding, please see the Oxford Gateway to Europe.
Horizon 2020 funding

To look for Horizon 2020 funding, we select Funder, and type in ‘Horizon 2020’ in the search box. We click ‘Search’, select the Horizon 2020 programme(s) we are interested in and click ‘Update’.

Note: for Oxford-specific guidance on European funding, please see the Oxford Gateway to Europe.

Amending an old FP7 search to a new Horizon 2020 search

Please see Research Professional’s mapping document, which shows how the programme names changed from FP7 to Horizon 2020 on the database.

Note: for Oxford-specific guidance on European funding, please see the Oxford Gateway to Europe.

Networking/collaboration grants

In the following example, we search for Networking/Collaboration Grants in Engineering. To do this, we need to select the advanced search option from the Funding menu on top of the screen and then select Discipline as our first search criterion. Select ‘Engineering’.

We then select Award type and add ‘Networking/Collaboration’. Research Professional will give a detailed explanation of any award types if you hover over the award terms with your cursor.

Foreign funders

In this advanced search example, we are searching for funders from the US, Canada and Germany only who provide funding for researchers in the Social Sciences. Add the Discipline ‘Social Sciences’, then click on the ‘More options’ drop-down menu, selecting Country of funder. Choose the countries you are looking for and click ‘Update’.
Your search will look like this:

Discipline is any of Social Sciences

Country of funder is not any of United Kingdom

You can also exclude a specific funder country. In the example below, we want results from everywhere except the United Kingdom by using the operator ‘is not any of’:

Hosting visiting researchers and/or hosting access to facilities

In the following example, you are searching for funding for visiting researchers in the computer sciences. To do this, you first need to select the advanced search option from the Funding menu on top of the screen and then select Award type as your first search criterion.

Add all of the following award types: ‘Hosting access to facilities’ and ‘Hosting visits’. Research Professional will give a detailed explanation of any award types if you hover over the award terms with your cursor.

Tip: To help the visiting researcher with travel expenses you could also look for Travel funding.

You can then add a discipline (in the example below, ‘Computer Science & Informatics’) by clicking on Discipline. The search screen will look like this:

Discipline is any of Computer Science & Informatics

Award type is any of Hosting access to facilities, Hosting conferences

5. Disclaimer

Research Professional and Research Services aim to give the correct information about these opportunities, however, please always check the funder’s website as deadline dates and other details can change.
Appendix 1: New Thesaurus: Research Professional’s explanation (Dec 2014)

“There is a single, root term at the top of the thesaurus denoting "Any Discipline". Below this, the thesaurus is organised according to a regular framework of four levels, with some additional "in-between" terms to ensure that each distinct concept is represented by a distinct term.

The four levels are:
Level 1 - Hub
Level 2 - UoA or Unit of Assessment [corresponding to UK’s REF 2014]
Level 3 - Clump
Level 4 - Node.

There are four hubs that broadly correspond to high level organisation inside universities: Bio/Medical, Physical Sciences and Engineering, Social Sciences, Arts and Humanities.

There are 36 UoAs corresponding to the 36 Units of Assessment in the UK’s REF 2014 exercise.

In-between terms can appear beneath any of the levels, including the bottom nodes. For example, "Physical Sciences" is an in-between term that fits between the Physical Sciences and Engineering hub and UoAs such as Physics.

Some terms have more than one parent.

A number of terms have been identified as "portfolio" terms. These indicate terms that are important for the organisational structure of the thesaurus and consistency with external systems, but which do not represent distinct concepts. Rather, they denote a portfolio of concepts, each of which may in turn be denoted by a child term. Unless necessary for consistency with external systems, portfolio terms are deprecated for classification.

Each term also comes with important metadata - scope notes, a list of synonyms and links to relevant web pages that describe the concept.

In the Economics and Econometrics UoA, we have organised the clumps according to the JEL codes used by the Journal of Economic Literature to classify work in economics, and widely adopted elsewhere [...]”