



## User Guide

# Using the funding search tools

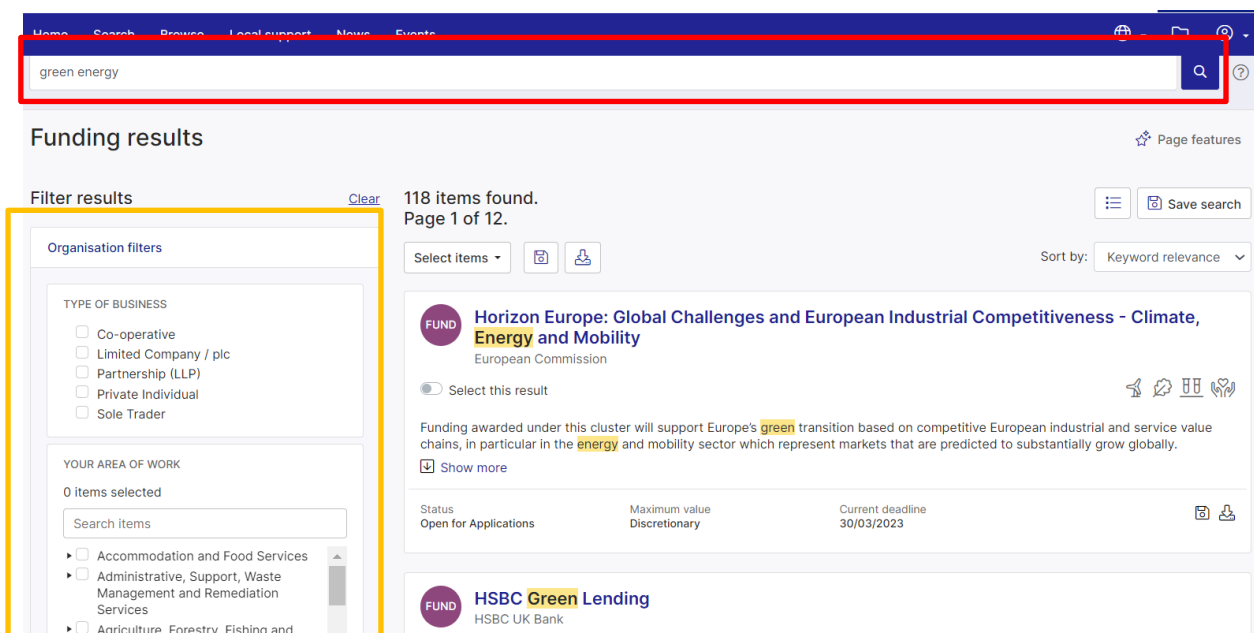


## 1. Search for funding

The **Search** page helps you to seek out grants, awards and other funding which may be relevant to your business by selecting a few filters and/or using keywords.

To begin searching, go to the search page. On the top of the page, you have a search bar to enter any keyword(s) relevant to your search (in red below). On the left of the screen, you have a list of filters to help pinpoint your business and your funding needs (in orange below). These filters are optional and have been specifically designed to help you identify relevant and useful results.

The more information you provide at this stage, the more specific your search results will be. The number of results dynamically updates as you add/remove filters and keywords.



The screenshot shows the Idox search results page. At the top, a search bar contains the text 'green energy'. Below the search bar, the page displays 'Funding results' for '118 items found. Page 1 of 12.' On the left side, there are two filter sections: 'Organisation filters' and 'Your area of work'. The 'Organisation filters' section includes a 'TYPE OF BUSINESS' list with options: Co-operative, Limited Company / plc, Partnership (LLP), Private Individual, and Sole Trader. The 'Your area of work' section includes a search box and a tree view of industry categories. The main results area shows two funding opportunities: 'Horizon Europe: Global Challenges and European Industrial Competitiveness - Climate, Energy and Mobility' and 'HSBC Green Lending'. The first result is from the European Commission and describes funding for Europe's green transition. The second result is from HSBC UK Bank.

We will describe below the different filters available:

### Organisation filters

#### Type of Business?

The first filter asks you to provide information about the type of business you are and its legal structure. Place a tick in the box next to each relevant option.

#### Your area of work?

The second filter asks you to provide information about the sector in which your business operates. There are two ways you can enter this information:

1. Type in an industry in the search phrase text box – for example, 'manufacturing' or 'retail' – then select from the options that appear under the text box. The system will automatically locate your industry from the wider tree.
2. Browse the tree by clicking on each of the arrows next to the industry headings – for example, Accommodation and Food Services – to expand the options under the headings.

Place a tick in the box next to each relevant industry. (Ticking an industry heading selects all industries under that heading.)

### **Number of employees?**

The third filter asks you to specify how many staff you employ from the options given in the drop-down menu.

### **Annual turnover?**

The fourth filter asks you to state a range for the annual turnover.

### **Stage of development?**

The fifth filter asks you to state whether your business is a seed business, a startup or established.

## **Project filters**

### **What do you require funding for?**

The sixth filter asks you to specify the main purpose(s) for which you require funding. For example, it may be that your business requires support for marketing and promotional activities. Or you may need funding to carry out research and development of a new product, process or service. There are two ways you can enter this information:

1. Type in an activity in the search phrase text box – for example, ‘training’ or ‘marketing’ – then select from the options that appear under the text box. The system will automatically locate your activity from the wider tree.
2. Browse the tree by clicking on each of the arrows next to the activity headings – for example, Business Support – to expand the options under the headings. Place a tick in the box next to each relevant activity. (Ticking an activity heading selects all activities under that heading.)

## **Other filters**

### **Funding type?**

This filter allows you to specify the type of funding you are looking for (eg: Grant, Loan...). Click on the “?” icon in the top right of this filter to know more about the different options.

### **Source?**

This filter allows you to specify who you want funding from (eg: Government, Lottery...). Click on the “?” icon in the top right of this filter to know more about the different options.

### **Geographic scope?**

This filter allows you to specify whether you are looking for local funders, or for bigger funders. Click on the “?” icon in the top right of this filter to know more about the different options.

### **Status of results?**

This filter allows you to specify whether you want to see only see opportunities that are currently open to applications, or all opportunities. Click on the “?” icon in the top right of this filter to know more about the different options.

## Using the Keyword section

If you know the name of a specific fund or have a specific theme or topic in mind while searching, you may find entering one or more keywords useful. Try to avoid common phrases and generic terms such as 'equipment', 'research' or 'training' as these are likely to bring up large numbers of results.

The search tool will identify funds where any or all of the keywords entered appear in whole or in part in the fund name or the information about the fund (as defined by the selected keyword matching options).



You can use the keyword section on its own as a separate search or integrate it with any of the filters.

## Generating a list of results


As you select filters and/or enter keywords, the list of results on the right hand-side of the screen will be dynamically updated.

Results are listed by default according to their keyword relevance when keywords are selected. You will see the title of each fund, along with a brief synopsis and an overview of the fund's scope, provider, maximum value, application deadline and status, allowing you to quickly determine if the fund is of interest.





118 items found.  
Page 1 of 12.

Select items ▾



Sort by: Keyword relevance ▾






**Horizon Europe: Global Challenges and European Industrial Competitiveness - Climate, Energy and Mobility**  
European Commission

Select this result    

Funding awarded under this cluster will support Europe's **green** transition based on competitive European industrial and service value chains, in particular in the **energy** and mobility sector which represent markets that are predicted to substantially grow globally.

[Show more](#)

Status	Maximum value	Current deadline	 
Open for Applications	Discretionary	30/03/2023	



**HSBC Green Lending**  
HSBC UK Bank

To view comprehensive information for a particular fund, click on its hyperlinked title. This takes you to the full fund view, which includes details such as objectives, who can apply, how to apply, contact information and useful links.

## 2. Browse for funding






If you are keen to get a broader picture of what types of funding might be available to support your business, the **Browse** feature is for you.

This feature allows you to browse a vast amount of relevant funding information effectively by breaking it down into manageable, easy-to-digest portions.

To begin browsing, click on the **Browse funding** link on the portal menu and select the type of organisation for which you are seeking funding.

### Browse – Organisation type

Locate the type of organisation for which you require funding opportunities.

 <p>Co-operative (588)</p> <p><a href="#">Filter further</a></p>	 <p>Limited Company / plc (829)</p> <p><a href="#">Filter further</a></p>	 <p>Partnership (LLP) (670)</p> <p><a href="#">Filter further</a></p>	 <p>Private Individual (355)</p> <p><a href="#">Filter further</a></p>
 <p>Sole Trader (544)</p> <p><a href="#">Filter further</a></p>			

Once you have selected the relevant option, you will be taken to a new screen. This list will be broken down into categories, with the number of individual funds belonging to each clearly specified. At this stage, you will be able to refine your search by clicking **Filter results further**.

### Browse – Project focus

Limited Company / plc

 <p>Arts, Culture &amp; Heritage (153)</p> <p><a href="#">Filter further</a></p>	 <p>Business Support (610)</p> <p><a href="#">Filter further</a></p>	 <p>Children &amp; Young People (32)</p> <p><a href="#">Filter further</a>   <a href="#">View results</a></p>	 <p>Community Development (72)</p> <p><a href="#">Filter further</a></p>
 <p>Crime, Rehabilitation &amp; Community Safety (7)</p> <p><a href="#">Filter further</a>   <a href="#">View results</a></p>	 <p>Education, Employment &amp; Training (121)</p> <p><a href="#">Filter further</a></p>	 <p>Energy (98)</p> <p><a href="#">Filter further</a></p>	 <p>Environment (176)</p> <p><a href="#">Filter further</a></p>

To view relevant funding opportunities for your chosen category, click **View all category results**. You will be taken to a full results listing, featuring information on all applicable funds based on your selection.

### 3. Using your results

Once you have generated a list of applicable results, whether by using the **Search** or **Browse** tools, you have the option to:

- **Sort your results** (on the right-hand side of the page) – alphabetically, according to deadline, or status.
- **Save items** – you may find it useful to save your items within the Open 4 platform to be able to find them again easily later when you login. You can select all items on the results page or just some of them.
- **Download items** – you may find it useful to export your funding search results into a Word or Excel document report which you can email to colleagues, pass on to clients or print off and read at a later date. You can select all items on the results page or just some of them.

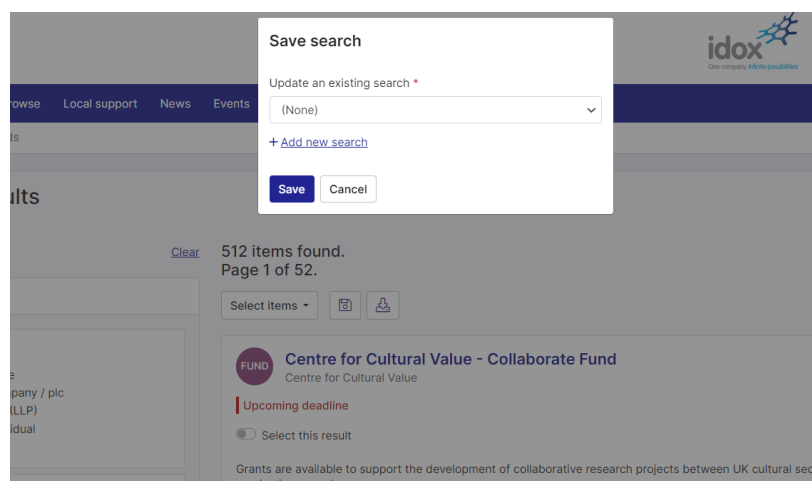
You can view your search criteria by clicking the **Show criteria** button in the top right-hand side of the results page.

### 4. Saving your results

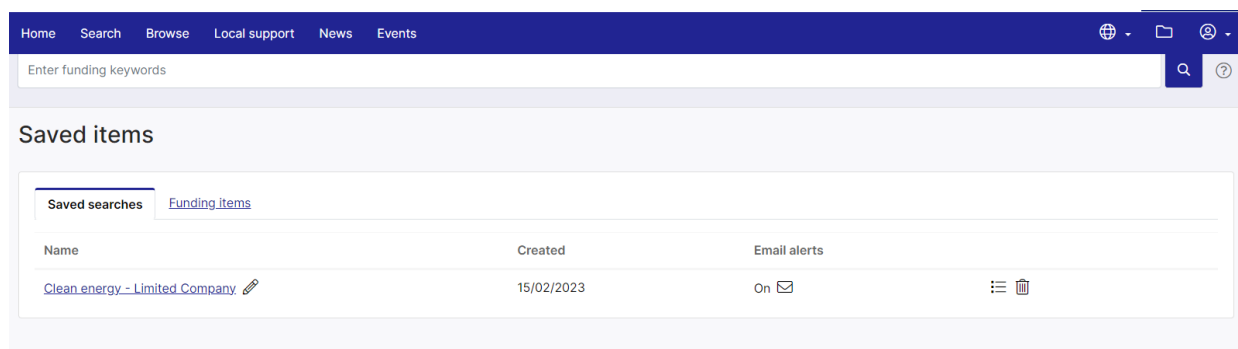
Saving a search means you can access it quickly and easily at a later date. To save a search, click **Save search** in the top right-hand side of the page.

The funding portal offers an interactive grant alert service which enables you to receive email updates when funding opportunities that match the searches saved to your profile are added or updated. Perhaps an existing programme that is of interest to you has recently undergone changes? Maybe an entirely new opportunity has just been launched which is similar to those you have looked at previously? Signing up to receive email notifications will mean you will hear about these developments first and will help you to stay informed.

To do this, place a tick in the **Email notifications** box when saving a search.



You can view and manage your saved searches and your saved items by clicking on the **folder icon** in the portal menu.



You can browse or search for funding as many times as you want – click on the **Search for funding** or **Browse funding** links on the portal menu to begin a new search.

## 5. How can I get more from the portal?

- The **News** section of the portal features national (and, where available, local) funding announcements affecting your business (or your area) so that you are quickly aware of when new funds have been launched, new deadlines have been announced and key statements have been made that could be of interest. Be sure to check this section regularly for the latest information. You can sign up to receive news alerts by email when registering or on the *Your details* page.
- The **Help & advice** section of the portal features information on a number of key funding aspects, such as identifying funding opportunities and writing your application. Referring to this section when carrying out funding activity will help you to focus your search and plan for making a funding application.