Portfolio Analyser provides facilities for the searching and analysis of current and completed research grants, Institute projects, fellowships, studentships, and training grants which are funded by the Biotechnology and Biological Sciences Research Council through various awards. These awards are held at universities, institutes strategically funded by BBSRC and other recognised research organisations in the United Kingdom.

It also provides facilities for the investigation of publications and other outputs from the institutes strategically funded by BBSRC such as journals, books, conference proceedings, reports, theses, articles, patents, computer programs, protein and DNA sequences, plant varieties and agricultural models.
PORTFOLIO ANALYSER USER GUIDANCE

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1. Introduction

Portfolio Analyser provides facilities for the searching and analysis of current and completed research grants, Institute projects, fellowships, studentships, and training grants which are funded by the Biotechnology and Biological Sciences Research Council through various awards. These awards are held at universities, institutes strategically funded by BBSRC and other recognised research organisations in the United Kingdom.

It also provides facilities for the investigation of publications and other outputs from the institutes strategically funded by BBSRC such as journals, books, conference proceedings, reports, theses, articles, patents, computer programs, protein and DNA sequences, plant varieties and agricultural models.

Use of Portfolio Analyser is subject to the BBSRC website Terms of use and to specific additional Terms and Conditions.

2. Accessing Portfolio Analyser

Portfolio Analyser is accessed via the Our Science section of the BBSRC website, with access to the Awards section provided via Search awarded grants and access to the Publications section available via Search institute publications.
Awards

The Awards section home page of Portfolio Analyser provides access to the search and analysis facilities, a guide for users, an indication of the last data update and details of the size of the current portfolio.
Publications

The Publications section home page of Portfolio Analyser provides access to the search and analysis facilities, a guide for users and details of the size of the current portfolio.
3. Data Currency

The Awards section of Portfolio Analyser is updated weekly. Details of the current update are provided on the home page of the system.

Institute publications data is updated biannually during Spring and Autumn.

4. Quick Start

**Awards**

EITHER

1. Use the Quick (Section 6.2) or Advanced Search (Section 6.7) to define a search strategy.
   a. Select at least one Award Type and Award Status in the Filter for the search to operate. The default settings will return a list (Section 6.3) of all current awards.
   b. If required, add search terms
   c. If required, select any additional search criteria
2. Submit the search strategy to retrieve a result set as a list of matching awards.
3. From the awards list either
   a. Drill down to the details of a specific award of interest (Section 6.4) OR
   b. Use the Summary (Section 6.8) or Custom Reports (Section 6.9) to further analyse the result set.

OR

4. Run a pre-defined Standard Report (Section 6.6)

**Publications**

1. Use the Publications Search (Section 7.2) to define a search strategy, adding search terms or using any of the supplied search criteria as required.
2. Submit the search strategy to retrieve a result set as a list of matching publications or other outputs.
5. Definitions

Associated Award

In some cases, a relationship may exist between two or more awards, for example when more than one award is part of the same research project. These associations, where present, are highlighted within the details provided on each award.

Award Type

An indicator of the purpose of the award. BBSRC awards support research and postgraduate skills development. These are further subdivided within the Advanced Search into the following categories:

Research

Research Grants - research grants provide researchers with support to undertake excellent scientific research in which the applicant(s) will be personally involved and which will deliver academic, economic and societal impacts. Funding for projects up to £2M is available through responsive mode. Larger programmes are funded through special schemes. Further details of all current research funding schemes are available on the BBSRC website.

Institute Projects - research activity at institutes strategically funded by BBSRC previously supported via the Core Strategic Grant and now via Institute Strategic Programme Grants.

Fellowships - schemes which are supported by BBSRC to enable scientists to devote their time to independent research and scholarships. Details of the current fellowship schemes are provided in the BBSRC Fellowships handbook

Skills

Studentships - the term used for directly (not Training Grant) funded studentships that provide an opportunity for graduates to receive one year’s Masters training or three or four years PhD training in research, research methods and employment-related skills.

Training Grants - funding for four-year PhD studentships and one-year Masters studentships awarded directly to university departments and other organisations (not to students) to allow institutions greater flexibility over the duration of the award and the level of stipend offered. Departments and supervisors then advertise for students. Training Grants are awarded under the Training Grant Terms and Conditions which have been agreed across Research Councils and are accessible on BBSRC’s website.

Students - the term used to identify students funded by BBSRC Training Grants.

At least one award type must be selected to carry out a search of the Awards System.
Award Status

An indicator of whether the award is active (i.e. current) or completed. Note that Institute Projects are updated on an annual basis in July and may be shown as current if they are active at any point during the current or forecast financial year.

At least one award status must be selected to carry out a search of the Awards System.

Award Value

Expressed in UK pounds £, this is:

- Research grants, fellowships, training grants - the total actual amount awarded to an Institution for the lifetime of the award
- Institute projects – the sum of the actual and currently planned (forecast year) spend
- Studentships – the sum of the average annual cost of each active year of the studentship
- Students – set to zero as these are funded via a Training Grant

Committee

BBSRC science programmes are administered via committees, each dealing with applications for funding in the major areas of the council’s scientific remit. The committee processing an award provides an indication of the nature of research or training being undertaken.

BBSRC occasionally reorganises its committees and therefore past awards may reflect the structures in place at the time of issuing the award. Details of the current BBSRC Committees are available from the BBSRC website.

Current

An award which has started and is active, or a completed award awaiting financial reconciliation or action.

Custom Report

A facility that allows the user to design a detailed report to analyse a set of search results by defining what data columns should be included and their order. The report provides subtotalling facilities and the ability to further drill down to awards ‘sub’ list and the details of a specific award.

Initiative

BBSRC operates a number of initiatives to encourage specific research activity. Initiatives generally have a specific research focus and may have specific eligibility or application requirements. Details of current and past Initiatives are available from the BBSRC website.

Institutes strategically funded by BBSRC

The institutes deliver innovative, world class bioscience research and training, leading to wealth and job creation, generating high returns for the UK economy. They have strong links with business, industry and the wider community, and support policy development.
The institutes’ research underpins key sections of the UK economy such as agriculture, bioenergy, biotechnology, food and drink and pharmaceuticals. In addition, the institutes maintain unique research facilities of national importance.

**The Pirbright Institute**, formerly known as the Institute for Animal Health (IAH), is a world-leading centre of excellence for research into infectious diseases of farm animals, to advance the knowledge of veterinary and medical science, and to enhance the sustainability of livestock farming.

**The Babraham Institute** undertakes innovative biomedical research to discover the molecular mechanisms that underlie normal cellular processes and functions, and how, over lifetime, their failure or abnormality may lead to disease.

**The Institute of Biological, Environmental and Rural Sciences (IBERS)** is a world class research and education centre at Aberystwyth University.

**The Institute of Food Research (IFR)** is a world leader in research into harnessing food for health and controlling food-related diseases.

**The John Innes Centre (JIC)** contributes over £170M annually to the UK economy and is an international centre of excellence in plant science and microbiology.
The **Earlham Institute**, formerly The Genome Analysis Centre (TGAC), is a national genomics and bioinformatics centre which addresses problems in agriculture, sustainable energy, food and nutrition, through novel approaches in genomics and specialising in genomics technology, high throughput data analysis, advanced bioinformatics and innovation.

The **Roslin Institute** is a BBSRC institute incorporated with the Royal (Dick) School of Veterinary Studies.

**Rothamsted Research** is the largest agricultural research centre in the UK.

### Research Priority

BBSRC has a set of Council-wide strategic research priorities that are applicable to the research grants portfolio. The current priorities were introduced in 2009 and will therefore only apply to awards from 2009 onwards.

### Research Topic

The classification scheme used to categorise the nature of BBSRC’s research portfolio. This classification has currently only been applied to awards active as at April 2008 onwards and therefore does not cover the full portfolio. More recent awards may also still be awaiting classification and therefore the information should be checked for updates.

### Scheme

Funding schemes operated by BBSRC to encourage specific research or training activity and / or that may have specific eligibility or application requirements. The following schemes are currently included:

- **Industrial Partnership Awards (IPA)** – science-led, responsive mode grants where the industrial partner contributes in cash at least 10% of the full economic costs of the project.

- **International Partnering Awards** – aim to set up partnership links between the UK and overseas laboratories; to promote the exchange of scientists; to promote access to facilities.
Studentship (Not funded via Training Grant) - the term used for a directly funded studentship that provides an opportunity for graduates to receive one year’s Masters training or three or four years PhD training in research, research methods and employment-related skills.

Student (Funded via Training Grant) - the term used to identify students funded by BBSRC Training Grants. Training Grants provide funding for four-year PhD studentships and one-year Masters studentships and are awarded directly to university departments and other organisations to allow institutions greater flexibility over the duration of the award and the level of stipend offered. Departments and supervisors then advertise for students. Training Grants are awarded under the Training Grant Terms and Conditions which have been agreed cross Council and are accessible on BBSRC’s website.

Standard Report

A predefined report on a specific aspect of BBSRC’s supported research and skills portfolio.

Summary Report

A facility that allows the user to select one or up to three predefined simple reports at any one time to analyse a set of search results. The reports provide the ability to further drill down to awards ‘sub’ lists and the details of a specific award.

Year

Portfolio Analyser data is based on a ‘calendar’ year.
6. Searching & analysing awards

6.1 Overview

The Awards section of Portfolio Analyser provides facilities to:

- define and execute a simple ‘quick’ search (Section 6.2)
- define and execute a complex ‘advanced’ search strategy (Section 6.7)
- retrieve a result set as a list of matching awards – the Awards List (Section 6.3)
- retrieve the details of a specific award – Award Details (Section 6.4)
- retrieve the details of a specific investigator or supervisor – Person Details (Section 6.5)
- analyse a result set using simple ‘summary’ report (Section 6.8)
- build a user defined ‘custom’ report to analyse a result set (Section 6.9)
- run pre-defined ‘standard’ reports (Section 6.6)
- export or download any required data (Section 11)
6.2 Using Quick Search

Use the Quick Search to define a search strategy and retrieve a result set as a list of matching awards (Section 6.3 - Awards List). Alternatively, enter the BBSRC reference number to directly view the details (Section 6.4) of a specific award or run a pre-defined 'standard' report (Section 6.6).

The Quick Search is accessed via the 'home' page of the Awards section of Portfolio Analyser.
EITHER

Search the award portfolio

1. Select at least one Award Type and Award Status in the Filter for the search to operate. The default settings will return a list of all current awards.

2. If required, further define the search strategy using one or more of the following criteria:

   - **Text Search** - enter complete or partial search terms using wildcards or Boolean operators
   - **Institution** - use the Institution Lookup to find and select the required award institution
   - **Investigator / Supervisor** - use the Person Lookup to find and select the required individual associated with an award either as Principal Investigator, Co-Investigator, Supervisor or Student
   - **BBSRC Committee** - select a current or past BBSRC Committee from the drop down list.

   *Details of how Boolean operators are used to link the different search criteria provided in the Quick Search are available in Annex 1.*

3. Click **Submit** to run the search query and return a list of matching Awards. Alternatively, **Clear the form** and re-define a search strategy.

OR

Locate a specific award

4. If known, enter the reference number of the award in the BBSRC Reference field to directly view the details of a specific award. The reference number must be entered in full, including all occurrences of / (a forward slash) e.g. BB/H014241/1

OR

Run a pre-defined standard report

5. If preferred, run one of the pre-defined standard reports listed on the Quick Search or supplementary standard reports page.
6.3 The Awards List

The Awards list provides a listing of summary information on each award either matching a search strategy defined via Quick Search (Section 6.2) or Advanced Search (Section 6.7), or forming part of a Summary Report (Section 6.8) or Custom Report (Section 6.9). The following information is provided on each award:

- reference
- title
- principal Investigator / supervisor name
- award institution
- value (£)
- status
- award type

Facilities are available to:

- view and modify (if required) the details of the search strategy generating the awards list 1;
- modify the number of records displayed per page 2;
- reorder the list by clicking the header of the required column 3;
- view the details of an award by clicking on the title of a specific record in the list 4;
- export the results as XML, XLS (Excel), CSV, or a PDF file by selecting the required option 5. The Terms & Conditions of Use must be accepted before the data can be exported.
- analyse the list of awards by creating a Custom Report 6;
- analyse the list of awards by creating Summary Reports 7;
- navigate through each page of search results in the list of awards 8.
# Awards list

## Current query:
- Award Type: Research Skills
- Award Status: Current
- Institution: Cardiff University
- Total No Of Results: 32

+ add or modify criteria  |  new search

## Showing Results 1 - 10 of 32

<table>
<thead>
<tr>
<th>Reference</th>
<th>Title</th>
<th>Principal Investigator/Supervisor</th>
<th>Institution</th>
<th>Value (£)</th>
<th>Status</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>BB/H001802/1</td>
<td>Comprehensive analysis of T-cell receptor degeneracy and T-cell crossreactivity</td>
<td>Professor Andrew Savell</td>
<td>Cardiff University</td>
<td>2,952,789</td>
<td>Current</td>
<td>Research Grant</td>
</tr>
<tr>
<td>BB/H002756/1</td>
<td>Identification and function of sex pheromones and their receptors in insects</td>
<td>Dr Wynand van der Goes van Naters</td>
<td>Cardiff University</td>
<td>219,281</td>
<td>Current</td>
<td>Research Grant</td>
</tr>
<tr>
<td>BB/H006176/1</td>
<td>Attention and predictive learning</td>
<td>Professor John Martinella Pearce</td>
<td>Cardiff University</td>
<td>459,797</td>
<td>Current</td>
<td>Research Grant</td>
</tr>
<tr>
<td>BB/H006575/1</td>
<td>Multiparametric microscopy of liquid protein dynamics in living cells using coherent anti-Stokes Raman Scattering and Two-Photon Fluorescence</td>
<td>Dr Paola Boni</td>
<td>Cardiff University</td>
<td>460,970</td>
<td>Current</td>
<td>Research Grant</td>
</tr>
<tr>
<td>BB/1004662/1</td>
<td>rSAM: Integrative Systems Analysis of the Human Proteome</td>
<td>Professor James Murray</td>
<td>Cardiff University</td>
<td>660,893</td>
<td>Current</td>
<td>Research Grant</td>
</tr>
<tr>
<td>BB/F016355/1</td>
<td>Doctoral Training Grant</td>
<td>Professor Andrew Quainbock</td>
<td>Cardiff University</td>
<td>223,040</td>
<td>Current</td>
<td>Training Grants</td>
</tr>
<tr>
<td>BB/F016557/1</td>
<td>Doctoral Training Grant</td>
<td>Professor Paul Jeffrey Kemp</td>
<td>Cardiff University</td>
<td>1,048,838</td>
<td>Current</td>
<td>Training Grants</td>
</tr>
<tr>
<td>BB/0018625/1</td>
<td>Gene expression in male germine of nect insects</td>
<td>Dr Helen White-Cooper</td>
<td>Cardiff University</td>
<td>74,410</td>
<td>Current</td>
<td>Training Grants</td>
</tr>
<tr>
<td>BB/0010097/1</td>
<td>Dissecting the mechanism of Wnt signal transduction using chemical probe</td>
<td>Professor Trevor Dale</td>
<td>Cardiff University</td>
<td>74,410</td>
<td>Current</td>
<td>Training Grants</td>
</tr>
<tr>
<td>BB/0010095/1</td>
<td>In vivo examination of viral exacerbations of allergic inflammation: function, mucous hypersecretion and mucosal clearance</td>
<td>Professor Kenneth Bredsky</td>
<td>Cardiff University</td>
<td>74,410</td>
<td>Current</td>
<td>Training Grants</td>
</tr>
</tbody>
</table>

## Buttons
- I accept the terms and conditions of use
- Download:  |  |  |  |  |  |  |
- Analyze the awards list by selecting one of the predefined Summary Reports or create your own Custom Report.
- create custom report using results  |  | create summary report using results  |  |

1 2 3 4
6.4 Award Details

The details of a specific award, including who is undertaking the work, where it is being done and the nature and scope of the research. Information is provided (if available) on:

- title
- BBSRC reference number
- principal investigator / supervisor
- co-investigators / co-supervisors
- award institution
- award department
- funding type
- value (£)
- status
- award type
- start date
- end date
- duration
- technical abstract
- lay summary
- impact summary
- BBSRC committee
- current research topics
- research priority
- BBSRC research initiative
- funding scheme
- list of associated awards

Facilities are available to:

- view further details about any named investigator or supervisor on the award
  (Section 6.5 - Person Details) 1
- access the website of the award institution 2. BBSRC has no control over external websites and does not accept responsibility for the information contained on these websites.
- access further information on the area associated with the relevant peer review Committee 3
- access the details of any other related (associated) awards, for example when more than one award is part of the same research project 4
- export the results as a PDF file 5. The Terms & Conditions of Use must be accepted before the data can be exported.
Award details

An integrated approach to the cost effective production of biodiesel from photosynthetic microbes

References: 88/1014245/1

Principal Investigator / Supervisor: Professor Anton Slabas

Co-Investigator / Co-Supervisors: Dr Joshua Simon

Institution: Durham University

Department: Biological and Biomedical Sciences

Funding Type: Research

Value (£): 844,516

Status: Current

Type: Research Grant

Start Date: 01/01/2009

End Date: 31/10/2014

Duration: 60 months

Abstract

Kanochloropsid and Synechocystis will be engineered to accumulate lipids in the form of triacylglycerols (TAGs) as feedstocks for biodiesel production. The end objective is to sequester CO2 from flue gas, reduce CO2 output and converting this into storage lipids and reducing the demand for fossil based fuels. The projects will use both adaptation, random mutagenesis and targeted gene expression to achieve this goal. In Kanochloropsid initial considerations will be on increasing the temperature at which the organism can grow. Biotransfer will be performed to identify genes involved in TAG biosynthesis and altering their expression so that TAG biosynthesis is maximal during the exponential phase of growth. Manipulation of the fatty acid profile will be undertaken to increase the level of saturated fatty acids. In Synechocystis genes will be introduced to direct metabolism from 6DG and 6DG synthesis towards TAG as well as optimise the flow of metabolites towards fatty acid biosynthesis. The fatty acid profile will be manipulated to favor a profile best for biodiesel production. Considerations will be made on the best way to harvest and process both organisms for lipid extraction.

Summary

Development of Renewable Fuels is an important consideration in terms of replacing fossil fuels, such as mineral oils and coal, as well as reducing the level of CO2 emissions associated with them. In this project we will develop marine algae to fix atmospheric CO2 and convert it using sunlight into raw material for biodiesel production. The main obstacles which have to be overcome are to develop strains of algae which can grow at high temperature (as flue gases are going to be used as the source of CO2) as well as efficiently converting the CO2 into carbon compounds which can be used as raw materials for biodiesel production. The work is being undertaken with a major biofuels manufacturer and the knowledge gained should advance us both scientifically and industrially.

Impact Summary

The following sectors of society will benefit from this research: PUBLIC with reduced CO2 emissions - which is in line with government policies ACAD/MAR - with advances in our understanding of metabolic pathways and how to engineer/control them INDUSTRY - obtaining micro-organisms which are engineered for industrial utilisation.

Committee:

Research Committee II (Plants, microbes, food & sustainability)

Research Topics:

Bioenergy, Industrial Biotechnology, Microbiology, Plant Science, Synthetic Biology

Research Priority:

Bioenergy

Research Initiative:


Funding Scheme:

X - not funded via a specific Funding Scheme

Associated awards:

88/1014245/1 Integrated approach to cost effective production of biodiesel from photosynthetic microbes

I accept the terms and conditions of use (opens in new window)

[Back to list] [New search]
6.5 Person Details

Provides details of the location of an investigator or supervisor associated with an award, together with a list of current and past BBSRC awards. Information is available on:

- name
- current institution
- current department
- institution website link
- previous institutions
- list of current awards
- list of completed awards

Facilities are available to:

- access the website of the person’s institution 1. BBSRC has no control over external websites and does not accept responsibility for the information contained on these websites.
- reorder the list of awards by clicking the header of the required column 2;
- view the details of an award by clicking on the reference or title of a specific record in the list 3;
- export the information as a PDF file 4. The Terms & Conditions of Use must be accepted before the data can be exported.
## Investigator / Supervisor details

### Completed Awards

<table>
<thead>
<tr>
<th>Reference</th>
<th>Title</th>
<th>Award Role</th>
<th>Value ($)</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>SR221127E</td>
<td>The influence of duty cycle length on secondary muscle injury</td>
<td>Principal Investigator</td>
<td>251,522</td>
<td>Research Grant</td>
</tr>
<tr>
<td>BC222463K</td>
<td>Development of a novel approach for assessing muscle strength</td>
<td>Principal Investigator</td>
<td>45,023</td>
<td>Research Grant</td>
</tr>
<tr>
<td>BC21804B1</td>
<td>The effect of radiant heat on muscle strength</td>
<td>Principal Investigator</td>
<td>45,023</td>
<td>Research Grant</td>
</tr>
<tr>
<td>BS217002B</td>
<td>Development of a novel approach for assessing muscle strength</td>
<td>Principal Investigator</td>
<td>45,023</td>
<td>Research Grant</td>
</tr>
<tr>
<td>BS217002F</td>
<td>The effect of radiant heat on muscle strength</td>
<td>Principal Investigator</td>
<td>45,023</td>
<td>Research Grant</td>
</tr>
</tbody>
</table>

### Current Awards

<table>
<thead>
<tr>
<th>Reference</th>
<th>Title</th>
<th>Award Role</th>
<th>Value ($)</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC22029E</td>
<td>The influence of duty cycle length on secondary muscle injury</td>
<td>Principal Investigator</td>
<td>251,522</td>
<td>Research Grant</td>
</tr>
<tr>
<td>BC222463K</td>
<td>Development of a novel approach for assessing muscle strength</td>
<td>Principal Investigator</td>
<td>45,023</td>
<td>Research Grant</td>
</tr>
<tr>
<td>BC21804B1</td>
<td>The effect of radiant heat on muscle strength</td>
<td>Principal Investigator</td>
<td>45,023</td>
<td>Research Grant</td>
</tr>
<tr>
<td>BS217002B</td>
<td>Development of a novel approach for assessing muscle strength</td>
<td>Principal Investigator</td>
<td>45,023</td>
<td>Research Grant</td>
</tr>
<tr>
<td>BS217002F</td>
<td>The effect of radiant heat on muscle strength</td>
<td>Principal Investigator</td>
<td>45,023</td>
<td>Research Grant</td>
</tr>
</tbody>
</table>

---

1. Reference 2
2. Reference 3
3. Reference 4
4. Reference 5
6.6 Standard Reports

In addition to the capability for users to define a ‘search and display’ strategy, the Awards section of Portfolio Analyst also provides a collection of predefined or standard reports. These save the user time in defining the search strategy and configuring the report display, and also provide consistency in approach. In this way, users have a mechanism to automatically access a report of their choice, but still have the capability to further analyse or redisplay the information as they see fit.

Standard reports are accessible from the Quick Search page of the Awards section.
Running a report

1. Identify the required report from those listed in either the Quick search page or available via the *More standard reports* link on the Quick Search page of the Awards system.

2. Click the title to run the report.
6.7 Using Advanced Search

Advanced Search provides a facility to define a search strategy and retrieve a set of results as a list of matching awards (see Section 6.3 - Awards List). It offers a larger number of search criteria options than Quick Search and provides the capability to define a more detailed, tailored search strategy.

The Advanced Search is accessed via the ‘home’ page of the Awards section.
Advanced grants search

Search the database of research and skills awards using a range of available criteria. Set the filter, enter complete or partial information using wildcards or exact matches, or use the lookups or multi-select dropdown lists to return details of matching awards.

Filter
At least one award type and award status must be selected.

Award type
Research
- [ ] Research Grants
- [ ] Institute Projects
- [ ] Fellowships

Skills
- [ ] Studentships
- [ ] Training Grants

Award status
- [ ] Current
- [ ] Completed

Submit  Clear Form  Quick
1. Select at least one Award Type and Award Status in the Filter for the search to operate. The default settings will return a list of all current awards.

2. If required, further define the search strategy using one or more of the following:

- **Text Search** - enter complete or partial search terms using wildcards or Boolean operators.
- **Institution** - use the Institution Lookup to find and select the required award institution. Selecting an Institution will expose the Department multi-select drop down list and hide the Institution Type and Region multi-select drop down lists.
- **Institution Type** - select one or more institution types from the multi-select list. This search criterion is available only if an Institution has NOT been selected.
- **Region** - select one or more regions from the multi-select list. This search criterion is available only if an Institution has NOT been selected.
- **Investigator / Supervisor** - use the Person Lookup to find and select the required individual associated with an award either as Principal Investigator, Co-Investigator, Supervisor or Student
- **Committee** - select one or more current or past BBSRC Committees from the multi-select drop down list.
- **Research Topic** - select one or more Research Topics from the multi-select drop down list. This is available when searching current awards ONLY as the classification was introduced in April 2008 and therefore does not cover the entire portfolio of completed awards.

- **Research Initiative** - select one or more Initiatives from the multi-select drop down list.

- **Funding Scheme** - select a one or more Schemes from the multi-select drop down list.

- **Start Year** - select the required operator i.e. after or during, during, before or during from the drop down list, then enter the required start year in YYYY format. Use of Start Year will deactivate the Start Date criterion. Reset the operator to select…. and delete any year value to reactivate the Start Date criterion.

- **Start Date** - select the required operator i.e. after or during, during, before or during from the drop down list, then either enter the required start date in DD/MM/YYYY format, or use the Calendar pop up to select the required date. Use of Start Date will deactivate the Start Year criterion. Reset the operator to select…. and delete any start date value to reactivate the Start Year criterion.

### Using the Calendar pop up

a. Click the centre of the header to change the mode i.e. day, month, year

b. Click the left or right arrow in the header to decrease or increase a mode value

c. Click the required date to select it
• **End Year** - select the required operator i.e. after or during, during, before or during from the drop down list, then enter the required end year in YYYY format. Use of End Year will deactivate the End Date criterion. Reset the operator to select.... and delete any year value to reactivate the End Date criterion.

• **End Date** - select the required operator i.e. after or during, during, before or during from the drop down list, then either enter the required end date in DD/MM/YYYY format, or use the Calendar pop up (see Start Date on previous page) to select the required date. Use of End Date will deactivate the End Year criterion. Reset the operator to select.... and delete any start date value to reactivate the End Year criterion.

• **Duration** - select one or more Duration ranges from the multi-select drop down list.

• **Award Value** - select an Award Value range from the drop down list.

*Details of how Boolean operators are used to link the different search criteria provided in the Advanced Search are available in Annex 1.*

3. Click **Submit** to run the search query and return a list of matching Awards. Alternatively, **Clear** the form and re-define a new search strategy.
6.8 Running a Summary Report

Summary Reports are accessible from the ‘results screen’ containing the list of awards retrieved in response to a search strategy.

Summary Reports provide a facility that allows the user to select one or more predefined simple reports to analyse a set of search results against a specific attribute e.g. the distribution of matching awards by institution, or by BBSRC Committee. The reports provide the ability to further drill down to awards ‘sub’ lists (Section 6.3 – Awards List) and then the details of a specific award (Section 6.4 – Award Details). One or more of the following reports can be generated:

- start year
- end year
- award duration range
- award value range
- award status
- institution
- institution type
- BBSRC committee
- region
- award type
- research initiative
- funding scheme
Running a report

1. Select one or up to three reports required to analyse the list of awards results
2. Click Generate Summaries to run the reports
The Report

Each report provides facilities to:

- reorder the report contents by clicking the header of the required column;
- view the list of awards for a specific row in the report by clicking the select button;
- export the results as XML, XLS (Excel), CSV or a PDF file by selecting the required option. The Terms & Conditions of Use must be accepted before the data can be exported.
6.9 Building a Custom Report

Custom Reports are accessible from the 'results screen' containing the list of awards retrieved in response to a search strategy.

Custom Reports allow the user to design a complex report to analyse a set of search results by defining what data columns (attributes) should be included and their order. Custom Reports provide subtotalling facilities and the ability to further drill down to awards 'sub' list (see Section 6.3 – Awards List) and then the details of a specific award. Reports can be built using up to three of the following data columns (attributes):

- Award Type
- Award Status
- Institution
- Department
- Institution Type
- Region
- Award Duration Range
- Funding Committee
- Award Value Range
- Research Initiative
- Funding Scheme
- Start Year
- End Year
1. Select at least one and a maximum of three data columns for the report by entering the numbers 1 to 3 against the required options. The numbering of the selections will affect both what columns will be used within the report in addition to their order i.e. lowest number: left, highest number: right. The ordering of the columns affects the nature of the analysis that will be possible.

2. Click *generate custom report* to run the report.
The Report

Each report provides facilities to:

- reorder the report contents by clicking the header title of the required column;  
- subtotal the data in the report by a specific column attribute. Click \( \Sigma \) in the header of the column required for subtotalling. Click \( \times \) to clear data subtotalling.  
- view the list of awards for a specific row in the report by clicking the Select button.  
- export the results as XML, XLS (Excel), CSV or a PDF file by selecting the required option. The Terms & Conditions of Use must be accepted before the data can be exported.
7. Searching and analysing publications

7.1 Overview

Use the Publications Search to define a search strategy and retrieve a result set as a list of matching publications. The publications database includes details of publications, journals, books, conference proceedings, reports, theses, articles, patents, computer programs, protein and DNA sequences, plant varieties and agricultural models from the following institutes strategically funded by BBSRC:

Babraham Institute (BI)
The Pirbright Institute, formerly the Institute for Animal Health (IAH)
Institute of Food Research (IFR)
John Innes Centre (JIC)
Rothamsted Research (RRES)
The Genome Analysis Centre (TGAC)
Institute of Grassland and Environmental Research (IGER) [to 2007]
Roslin Institute (RI) [to 2007]
Silsoe Research Institute (SRI) [to 2005]
Institute of Arable Crops Research (IACR) [to 2000]
Horticulture Research International (HRI) [to 2005]

The Publications Search is accessed via the ‘home’ page of the Publications section of Portfolio Analyser.
7.2 Searching for publications

1. Define a search strategy using one or more of the following:

   - **Text Search** - enter complete or partial terms using wildcards or Boolean operators to search all text based fields i.e. title, authors and journal name of a publication.
• **Publication Title** - enter complete or partial terms using wildcards or Boolean operators to search the title of a publication. This is **NOT** the title of the journal in which the publication appears (see below).

• **Author** - enter complete or partial terms using wildcards or Boolean operators to search the authors of a publication.

• **Journal** - enter complete or partial terms using wildcards or Boolean operators to search the journal in which the publication appears.

• **Institute** - select one or more Institutes from the multi-select drop down list.

• **Publication Type** - select one or more types of publication from the multi-select drop down list.

• **Publication year** - select the required operator i.e. after or during, during, before or during from the drop down list, then enter the required start year in YYYY format.

*Details of how Boolean operators are used to link the different search criteria provided in the Publications Search are available in Annex 1*

2. Click **Submit** to run the search query and return a list of matching publications. Alternatively, **Clear** the form and re-define a new search strategy.
7.3 Publications List

The Publications list provides a listing of summary information on publications matching a search strategy defined via the Publication Search (Section 7.2). The following information is provided on each publication:

- title
- author(s)
- journal name, volume, issue and page numbers
- publication year
- publication type
- institute
Facilities are available to:

- view and modify (if required) the details of the search strategy generating the publications list;
- modify the number of records displayed per page;
- reorder the list by selecting one of the following options from the drop down list:
  - by year ascending
  - by year descending (default)
  - by first author surname (A - Z)
  - by first author surname (Z - A)
  - by publication name (A - Z)
  - by publication name (Z - A)
- navigate through each page of search results in the list of publications;
- export the results as XML, XLS (Excel), CSV or a PDF file by selecting the required option. The Terms & Conditions of Use must be accepted before the data can be exported.
8. Text Searching

Portfolio Analyser uses Lucene text search technology. This supports wildcards, Boolean and other operators to link and use query terms wherever these are employed in defining a search strategy in the Awards or Publication sections of the system.

Principles

- A search query is broken into terms and operators
- A term may be a single word e.g. `crop` or a phrase consisting of a group or words surrounded by double quotes e.g. "crop improvement"
- Automatic correction is not applied to any misspelled words
- Stemming is not applied to any terms
- Wildcards can be used within a term to broaden the scope of a search (see below)
- Multiple terms can be combined together using Boolean operators to form a more complex query (see below)
- **Boolean operators must be used as capitals i.e. OR, AND, NOT**
- Queries are otherwise not case sensitive

Using Wildcards

In search context, wildcards replace a single letter or a series of letters in order to expand results.

Use the `?` symbol to perform a single character wildcard search. The single wildcard search looks for terms that match with the single character replaced.

Use the `*` symbol to carry out a multiple wildcard search and look for 0 or more characters e.g. `h*moglobin` to return `haemoglobin` or `hemoglobin`, `tomato*` to return `tomato` or `tomatoes`

Wildcard queries will not work when used:

- as the first character (prefix) of a search term e.g. `*nanotechnology`
- within a phrase query e.g. "gene sequenc*"

Operators

A search operator is an instruction that joins search terms to form a new, more complex query. It enables searching for several words at once by informing Lucene how to link search terms. The most common search operators are the Boolean operators (must be used as capitals i.e. AND, OR, NOT) and the use of double quotes to specify an exact phrase. These allow the inclusion or exclusion of documents from the search results.

<table>
<thead>
<tr>
<th>Group</th>
<th>Operator</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boolean</td>
<td>OR</td>
<td>Finds documents that contain at least one of the specified terms.</td>
<td><code>crop OR plant</code></td>
</tr>
<tr>
<td></td>
<td></td>
<td>The <strong>OR</strong> operator links two terms and finds matching documents if either of the terms exist in a document. The <strong>OR</strong> operator helps you broaden your search</td>
<td>Finds documents containing <code>crop</code> or <code>plant</code>, or both.</td>
</tr>
<tr>
<td>Operator</td>
<td>Description</td>
<td>Example</td>
<td>Result</td>
</tr>
<tr>
<td>----------</td>
<td>-------------</td>
<td>---------</td>
<td>--------</td>
</tr>
<tr>
<td><strong>AND</strong></td>
<td>Finds documents that contain all of the specified terms. Use the AND operator to search for documents in which all the terms joined with the AND operator are present. Therefore, if 4 keywords are joined with AND in a search, only documents containing all 4 keywords will be returned. On the other hand, a document that contains 3 of the 4 keywords will not be returned. The AND operator helps you narrow your search. Their order is not important. Be careful not to overuse the AND operator in a query; a search that is too specific could overlook relevant results.</td>
<td>crop AND improvement AND farm</td>
<td>Finds documents containing all three terms.</td>
</tr>
<tr>
<td><strong>NOT</strong></td>
<td>Excludes the data fields or documents that contain the specified word. Use the NOT operator to exclude documents that contain the specified words. The NOT operator helps you narrow your search.</td>
<td>farm NOT crop</td>
<td>Finds documents that do not contain crop but contain farm</td>
</tr>
<tr>
<td>Other</td>
<td>Quotation marks &quot;&quot; Finds documents that contain the exact phrase. Quotation marks can be used to search for an exact phrase.</td>
<td>&quot;crop improvement&quot;</td>
<td>Finds documents containing this exact phrase.</td>
</tr>
</tbody>
</table>

**Note:** OR is the default operator. This means that if there is no Boolean operator between two terms, the OR operator is used.

**Note:** Exact phrase queries apply to groups of terms (words, numbers, etc.), not single terms.
9. Navigation

A variety of mechanisms are provided to navigate around Portfolio Analyser in addition to using the Back and Forward buttons in your browser. These are highlighted below. The full route map through the system is also provided in Annex 2.

10. Sorting

All results tables in Portfolio Analyser provide a data sorting capability. Results can be reordered by clicking the column heading to perform an ascending or descending alphabetic or numeric sort, as appropriate.

11. Exporting data & Terms & Conditions of Use

Portfolio Analyser provides facilities to export data via a number of file formats i.e.

- Extensible Markup Language (XML)
- Microsoft Excel (XLS)
- Comma Separated Values (CSV)
- Portable Document Format (PDF)

Users must accept the terms and conditions before being permitted to proceed with a data export.
Terms & Conditions of Use for Portfolio Analyser and any exported data

The terms of the Biotechnology and Biological Sciences Research Council ("BBSRC") research and training grants places a responsibility on universities to provide information about researchers and their projects. The BBSRC's facility for searching and analysing awards is provided to make this information accessible and understandable for a wide range of users to promote and facilitate collaboration, networking and engagement across the full breadth of BBSRC research. The facility meets the BBSRC’s requirement to be transparent and accountable for its funding decisions by making information available to any interested user.

Application of Terms and Conditions

The data and information contained within the Portfolio Analyser (or available via its export facility) and accessible in the “Search awarded grants” and “Search Institute publications” sections of the BBSRC website is referred to in this document as the “DATA”. Use of the DATA is subject to the BBSRC website Terms of use and to these additional Terms and Conditions. Where these Terms and Conditions conflict with the Terms of use, these Terms and Conditions will prevail to the extent necessary to resolve the conflict. These Terms and Conditions apply to use of the DATA only. Please read these Terms and Conditions carefully before you start to use the Portfolio Analyser. Your use of the DATA constitutes acceptance of the BBSRC website Terms of use and these Terms and Conditions. These Terms and Conditions take effect on the date of your first use of the DATA.

Variations

We may revise the BBSRC website Terms of use and these Terms and Conditions at any time by amending the page at http://www.bbsrc.ac.uk/site/terms-and-conditions.aspx or this page. Your use of the DATA is subject to the Terms and Conditions in operation at the time that you use the DATA. Your continued use of the DATA after changes to these Terms and Conditions are posted constitutes acceptance of the Terms and Conditions as modified.

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The DATA is protected by copyright laws and treaties around the world and by database rights. All such rights are reserved.

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- export, extract, copy and store the DATA;
- adapt the DATA;
- publish, distribute and transmit the DATA; and
- subject to these Terms and Conditions, permit others do any of the foregoing in respect of DATA exported, extracted or copied by you.

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In respect of all use of the DATA you must clearly acknowledge the source of the DATA and clearly include with any DATA or adaptation of the DATA that is stored, published, distributed or transmitted the following acknowledgement:

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- use the DATA in a way that suggests the BBSRC endorses you or your interpretation or use of the DATA;
- misrepresent the DATA or the BBSRC source;
- use the DATA in breach of the Data Protection Act 1998 as amended from time to time;
- use the DATA in or to support a criminal, illicit or unlawful activity;
- use the DATA in a manner that infringes the rights of, or which may harass or cause distress or inconvenience to any third party;
- use the DATA in a manner that may restrict, or inhibit the use and enjoyment of this site by any third party; nor
- use the DATA to inflame or make comments that are racist, sexist or homophobic, or which promote or incite violence or illegal activity.

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Your Concerns

If you have any concerns about the material that appears on our site, please contact webmaster@bbsrc.ac.uk.
12. **Scope & Caveats**

Portfolio Analyser contains details of awards active as at and Institute publications published from 1997 to the present. A small number of schemes covering support for international activities, innovation and skills, and information on the individual studentship projects supported through Training Grants (2006 onwards) are not currently available through this interface, but further details will become available in the future.

Some of the information held within Portfolio Analyser, particularly award titles, abstracts, technical and impact summaries, is provided by applicants. BBSRC does not accept responsibility for the accuracy of these statements.

A number of links within the system are to external websites over which BBSRC has no control. We do not accept responsibility for the information contained on these websites.

13. **Comments & feedback**

Every effort is made to maintain the accuracy of the information provided via Portfolio Analyser. However we welcome any notifications of errors, inaccuracies or where the information appears to be misleading.

In addition BBSRC welcomes any comments on the current system together with suggestions for changes and future enhancements. Please contact bbsrc.cps@bbsrc.ac.uk
ANNEX 1  Rules for application of Boolean operators in Quick and Advanced Search

The following business rules are applied in the use of Boolean operators within multiselect lists and searches provided by Portfolio Analyser.

Multi select drop down list

Options in a multiselect drop down list are linked with an OR

Quick Search (Home page)

(Research OR Skills)
AND
(Current OR Completed)
AND
Text Search
AND
Institution
AND
Investigator / Supervisor
AND
(BBSRC Committee)

BBSRC Institute Publications Search

Text Search
AND
Publication Title
AND
Author
AND
Journal
AND
(Institute1 OR Institute2……)
AND
(Publication Type1 OR Publication Type 2……)
AND
Publication Year
Advanced Search

( (Research Grants OR Institute Project OR Fellowships OR Studentships OR Training Grants) AND (Current OR Completed) ) AND Text Search AND ( Institution AND (Department1 OR Department2……) ) AND (Institution Type1 OR Institution Type2……) AND (Region1 OR Region2……) AND Investigator / Supervisor AND (Committee1 OR Committee2……) AND (Research Topic1 OR Research Topic2……) AND (Initiative1 OR Initiative2……) AND (Scheme1 OR Scheme2…. ) AND (Start Year OR Start Date) AND (End Year OR End Date) AND (Duration1 OR Duration2……) AND Award Value