What is a COS Pivot Homepage?

When you first log in to COS Pivot, you are brought to your **Homepage**. Think of your **Homepage** as the place you manage funding opportunities and funding searches you are interested in, track who you have shared opportunities with, and view suggestions received from the **Advisor**. It's also the launch pad to funding and profile searches.

Your COS Pivot **Homepage** is organized in several areas:

- The **Main Homepage** (what you see when you log in which includes any Active opportunities)
- **Tracked** Opportunites
- Saved **Searches**
- **Shared** Opportunities (those you shared with someone as well as opps shared by someone to you)
- Suggestions from the **Advisor**

You can also navigate to the Funding, Profile, and Support areas, as well as conduct a search of either Funding or Profiles.

At the bottom of the page, there is a list of your **Recent Activity** in the past month which summarizes:

- how many funding opps you shared
- how many funding opps were tracked
- how many funding opps were were shared with you (and by whom)
- how many you flagged as active
- how many searches you saved

Main Homepage and Active Opps

The **Main Homepage** provides you with a quick glance of your **Active** funding opportunities, as well as a summary of recent activity.

Active Opps are those which are the most important to you. It's your "*short list*" of all the opps you are interested in, with the most critical being marked by you as "active". You identify a funding opportunity as "active" from your search results and you can assign a "tag" to the opp to help you easily group and/or locate it later. See the **Help** files on **Funding** in the **Support** area, for information on marking an opportunity "active".

The **Active** button will indicate the total number of opportunities which you have identified as "active".

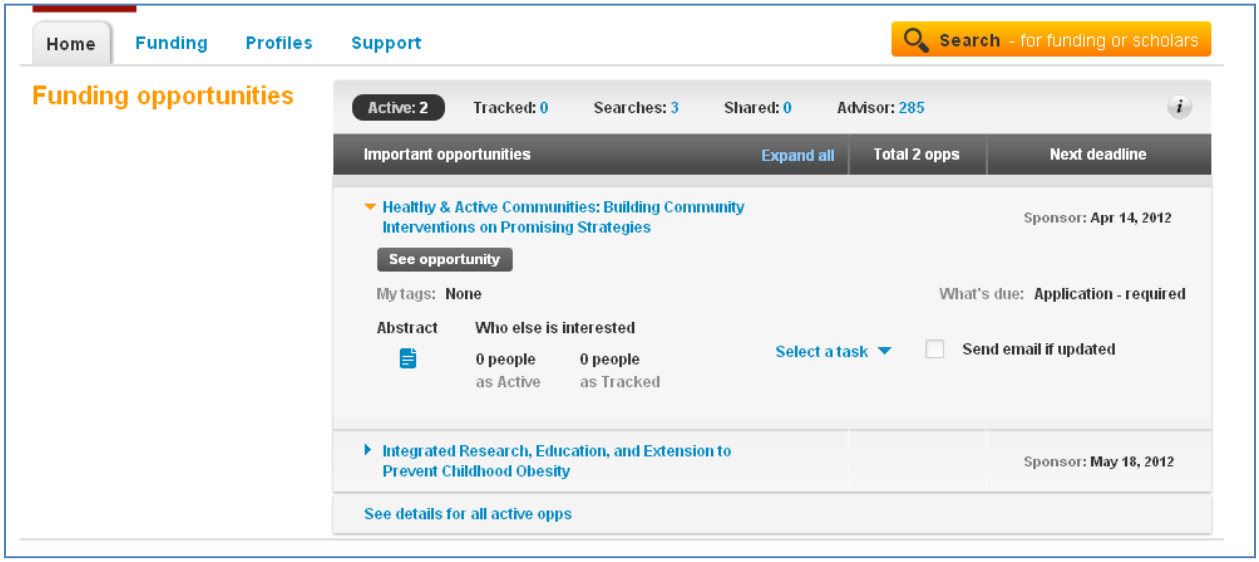
Your **Active Opps** are displayed in deadline order with the title of the opportunity and the next deadline displayed. Up to 10 opps are displayed on the **Active** list on your homepage. Click on **See details for all active opps** to see all of your **Active** opps.

Clicking on the title in the **Active Opps** area will display additional information including:

- Sponsor deadline
- What's due next (application, proposal, letter of intent, etc.)
- Any tags you have assigned to the opp
- Quick access to the abstract for the opp
- Who else is interested in the same opp within your organization (either tracking the same opp or marking it as active)
- An email update option to notify you if the opp is updated
- Task options (where you can delete, tag, share, move, or review who you've shared it with)

There is also a link to the full funding opportunity record.

You can expand all your **Active Opps** by clicking on the **Expand All** link.



Tracked Opportunities

Tracked Opportunities are those which you want to monitor, but they are less crucial than your **Active** opps. When you **Track** an opp, you can also assign a "tag" to the opp to help you easily group and/or locate it later. You track and tag opportunities from your search results or from within an individual funding opportunity. See the **Help** files on **Funding** in the **Support** area, for information on how to tag an opportunity.

The **Tracked** button indicates the number of opportunities you are monitoring. Clicking on the button will display a summary of tracked items for the *current month* including:

- The total number tracked
- The total number of tracked opps that you have deleted from the tracked area
- The total number of tracked opps that you have moved to **Active** from **Tracked**
- The total number of tracked opps that have expired (the deadline has passed and these opps are no longer available)

To view all your **Tracked** opps, click on the **See details for my tracked opps** link.

Tracked Opps Details

Your **Tracked** opps are sorted into two groups – those that are saved in folders that you create and name, and those opps that are tracked individually. When you view the **Tracked Opps Details**, the tracked opps that are in a folder are displayed above the individually tracked opps.

You can refine your **Tracked** opps list (whether tracked in a folder or individually) by the tags you have assigned. On the left-hand side of the page, your tags will be listed. Marking a specific tag (or tags) will display only those tracked opps with the selected tags.

You can also share multiple tracked opps with others. To do this:

1) Select the tracked opps to share by marking the associated tag(s).
2) Click on the **Share a view of opps** link on the left-hand side of the page.
3) Enter the email addresses or select a pre-defined group name, fill in the message and click **Share.** Note: you can send a copy of the email to yourself and/or opt to let all recipients see who else is receiving the email.

You can also share funding opps individually (instead of groups) from the tracked opp details and selecting **Share this opp** from the **Select a task** drop-down.

Note: When sharing an opp with someone outside your organization (or with someone who does not have a COS Pivot account) the shared opp will only be available for viewing for 14 days. COS Pivot users will be able to view a shared opp indefinitely.

Expired Opps are also linked to from the left-hand navigation. If an opportunity is no longer available and we do not anticipate it being offered again based on information from the sponsor, it is no longer searchable in the database. If an opportunity on your **Active** or **Tracked** lists expires, it automatically moves into your **Expired opps** list. You can view the title of opportunities and info on the sponsor for your reference, but it is no longer possible to view the funding opportunity.

Related Details provides quick links back to your Active Opps, Shared Opps or Opps Shared with You.

Tracked Opps in a Folder

Folders with **Tracked** opps are listed in alphabetical order. COS Pivot also displays the number of opportunities in the folder along with the ability to rename or delete the folder.

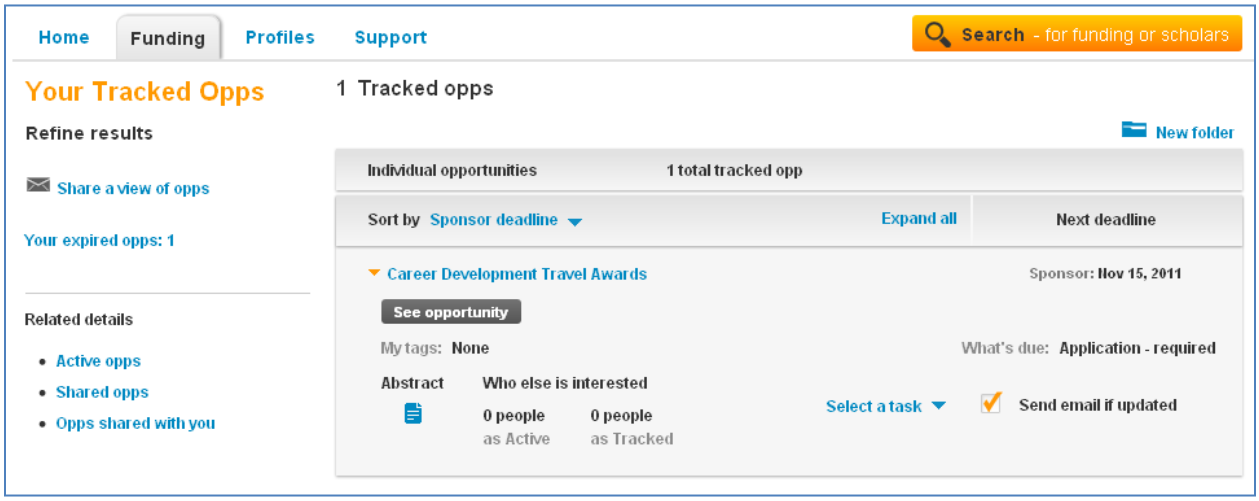
To view the opportunity(ies) in a folder:

1) Click on the folder name.
2) The tracked opp title(s) displays along with the next deadline.
3) Clicking on the expand arrow next to the opp title displays a summary (the same type of summary you see for active opps).
4) From the summary, you can:
   - View the complete opp by clicking on the **See Opportunity** button.
   - View the opp abstract by clicking on the Abstract icon.
   - See how many other in your organization are interested in the same opp (they have either marked it as **Active** or **Tracked**.
   - Receive an email update if a change has been made to the opp by marking the **Send email if updated** option.
   - Perform several tasks:
     - **Move the opp out of the folder** (opp remains **Tracked**)
     - **Delete the opp** (deletes from folder and from **Tracked** area)
     - **Move to my active opps** (moves the opp from **Tracked** to **Active**)
     - **Edit my tags for this opp** (remove a current tag, add a new tag that you create or add a tag that already exists)
     - **Share this opp** (share the opp via email)
     - **People I've shared this with** (view who you have shared an opp with during the current and past month and see if they have made it active or tracked on their COS Pivot Homepage)

You may notice opps on your **Tracked** list with a "shared" icon next to the opp name. This indicates that a Pivot Research Administrator from your institution placed this on your **Tracked** list. Clicking on the "shared" icon will display the name of the person who shared the opp as well as the date shared. Clicking on the "message" link below the name and date will display any personal message attached to the opp from the sender. Once you click on the "shared" icon, it will no longer display. If you wish to receive an email if the opp is updated, mark the **Send email if updated** checkbox.

Individually Tracked Opps

Funding opportunities that you do not assign to a folder, are listed by default by the sponsor deadline. You can also sort the alphabetically by clicking on the **Sort by** drop-down and selecting **Alpha order**.



Clicking on each opp expands to show the summary view. You can expand all of your tracked opps by clicking on **Expand All** displayed just above your list of tracked opps.

You can track as many opps as you want, there is no limit.

From the tracked opp summary, you can:

- View the complete opp by clicking on the **See Opportunity** button.
- View the opp abstract by clicking on the Abstract icon.
- See how many other in your organization are interested in the same opp (they have either marked it as **Active** or **Tracked**.
- Receive an email update if a change has been made to the opp by marking the **Send email if updated** option.
- Perform several tasks:
  - **Move the opp out of the folder** (opp remains **Tracked**)

- **Delete the opp** (deletes from folder and from **Tracked** area)
- **Move to my active opps** (moves the opp from **Tracked** to **Active**)
- **Edit my tags for this opp** (remove a current tag, add a new tag that you create or add a tag that already exists)
- **Share this opp** (share the opp via email)
- **People I've shared this with (**view who you have shared an opp with during the current and past month and see if they have made it active or tracked on their COS Pivot Homepage)

You may notice opps on your **Tracked** list with a "shared" icon next to the opp name. This indicates that a Pivot Research Administrator from your institution placed this on your **Tracked** list. Clicking on the "shared" icon will display the name of the person who shared the opp as well as the date shared. Clicking on the "message" link below the name and date will display any personal message attached to the opp from the sender. Once you click on the "shared" icon, it will no longer display.

Saved Searches

In addition to tracking individual funding opps, COS Pivot allows you to save your search queries. Saving a search query saves you time as we automatically provide weekly funding alerts that identify any newly added or updated opps that match your query. There is no need to continually enter and run the same search over and over.

You can also share your search query with collaborators (the search results will only be accessible if your collaborators have a COS Pivot account).

The **Searches** button indicates the number of searches you have saved. Clicking on the button will display up to ***3 saved searches*** (which are a combination of saved searches in folders or individual searches) on your homepage. Additional saved searches are accessed by clicking on the **See your full list of saved searches link**.

Note: Folders created in the **Saved Searches** area are separate from folders created in the **Tracked** area.

Your saved search summary on your homepage displays:

- Folders with saved searches first in the list, followed by individually saved searches (up to 3 folders or searches total).
- The number of funding opps that match your search query and the number of potential faculty collaborators are displayed for individually saved searches. Potential faculty collaborators are also available for saved searches in a folder. Click on the **See your full list of saved searches** link to see the number of **Faculty Matches** for each saved search in your folder.

Note: The **Faculty Match** number displayed on your homepage represents the total number of faculty in your organization matched to opportunities delivered in your weekly funding alert. The total number displayed is a unique number – so a faculty member is only counted once even if they are matched to multiple opps in your alert results.

Saved Searches are automatically run weekly and the number of opps and potential Faculty Matches are updated based on the latest weekly search run. These **Saved Search** runs are known as **Funding Alerts**. **Funding Alerts** are currently run on Sunday (Eastern Time).

When you first save a search query, you will not have any funding alert results.

To Display a Saved Search or Folder of Saved Searches on your Homepage:

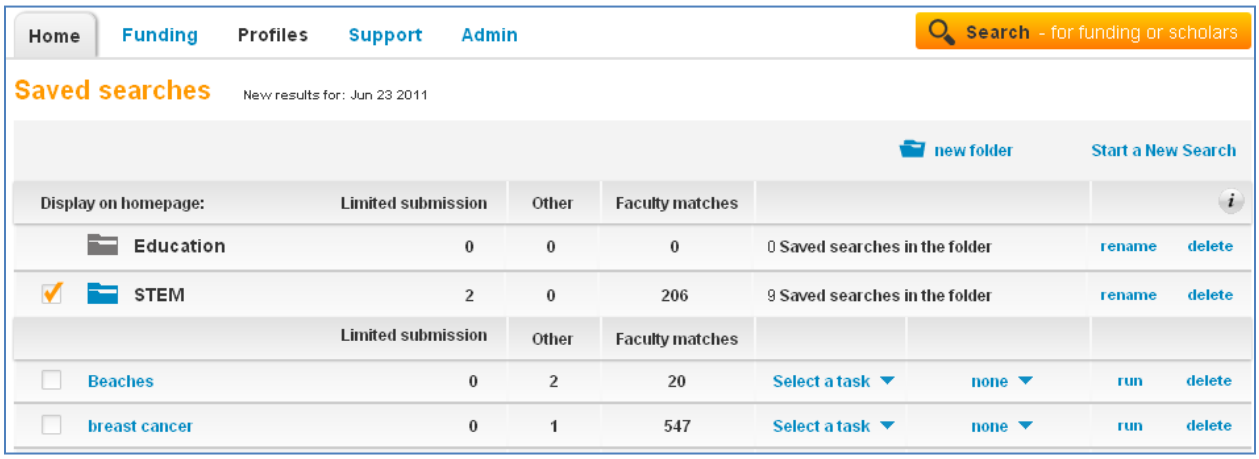
1) Click on the **Searches** button.
2) Click **See your full list of saved searches**.
3) From the **Saved Searches** page, click the check box next to the saved search or folder of searches you wish to have displayed. You can have up to 3 selections on your homepage (a combination of saved searches and folders).

To Remove a Saved Search or Folder of Saved Searches from your Homepage:

1) Click on the **Searches** button.
2) Click **See your full list of saved searches**.
3) De-select the Saved Search or folder you wish to remove.

Saved Search Details

To view all your **Saved Searches** , click on the **See your full list of saved searches** link.



Your saved searches are displayed in alphabetical order. Folders are displayed above individually saved searches. Clicking on the folder name will display all saved searches stored in that folder.

You may notice searches on your **Searches** list with a "shared" icon next to the name of the search. This indicates that a Pivot Research Administrator from your institution placed this on your **Searches** list. Clicking on the "shared" icon will display the name of the person who shared the saved search as well as the date shared. Clicking on the "message" link below the name and date will display any personal message attached to the saved search from the sender. Once you click on the "shared" icon, it will no longer display. If you wish to receive a funding alert on the search, you will need to set this up by clicking on "**none**" and selecting "**email weekly**".

In addition to displaying the folder name or the saved search name on the Saved Searches page, your weekly funding alert summary is also displayed. This summary in includes:

- **Limited submission opps** – total number of funding opps in your weekly alert that are identified as requiring limited submission
- **Other opps** (non-limited submission) – number of opps in your weekly alert that are NOT limited submission.
- **Faculty matches** – total number of potential collaborators in your organization based on weekly alert results.

Funding Alerts are automatically run weekly on all saved searches (regardless of whether you have opted for a weekly email).

For information on how to save a search query, see the **Help** files on **Funding** in the **Support** area of your homepage.

You can perform several tasks from the **Saved Searches** page:

- Create, rename and delete folders for saved searches.
- Perform specific tasks on a saved search (move to a folder, share, edit, and view the archives)
- Run or delete saved searches
- Establish weekly email alerts for specific saved searches (alerts are always run even if you do not select the email option.

To Create a Folder for Saved Searches:

1) Click on the **Searches** button on your homepage.
2) From the **Saved Searches** page, click the **New Folder** link.
3) Name your folder and click the **Submit** button.
4) Your new folder will appear. Folders are listed alphabetically by name.

To View Saved Searches Stored in a Folder:

1) Click on the **Searches** button on your homepage
2) Click on the folder name with the saved searches you wish to view. The saved search(es) will be displayed below the folder name.

To Move a Saved Search to a Folder:

1) Save your search from the Funding results page. See the **Help** file on **Funding** in the **Support** area, for information on how to save a search query.

2) Locate your saved search on the **Saved Searches** page and click on the **Select a task** drop-down.
3) Click **Move this search to a folder**.
4) Click the radio button next to the folder you wish to move the saved search into and click **Submit**.
5) Your saved search is moved from the individual list to the folder you specified. If your saved search had been checked for display on your homepage, once it is moved, it will no longer be visible on the homepage. You will need to mark the folder as one of your 3 items to display on the homepage.

To Rename a Saved Search Folder:

1) Click on the **Searches** button on your homepage
2) Locate your folder and click the **Rename** link at the far right.
3) Enter the new folder name and click **Submit**.

To Delete a Saved Search Folder:

1) Click on the **Searches** button on your homepage
2) Located your folder and click the **Delete** link at the far right
3) Click the **Delete Folder** button.

Note: Any saved search queries that were in a deleted folder will be displayed below the folder area. Deleting a folder does not delete your saved search.

Sharing a saved search

You can share your search query with other COS Pivot users . It's as simple as sending an email. The unique URL for your saved search is included. This is also a great way to post a saved search on a web-page for other COS Pivot users to access. Each time the unique search URL is clicked on, the most up-to-date search results are presented that match your search query.

To share a saved search:

1) Locate your saved search query in the **Searches** area of your homepage.
2) Click **Select a task** for your saved search and select **Share this search.**
3) Enter the email addresses of those with whom you want to share your search. You can also select a pre-defined group as your recipient
4) Enter a message to accompany the saved search URL.
5) Click **Share**.

A record of your shared search will be automatically entered in your **Shared** area of your COS Pivot Homepage.

Optional: You can send a copy of the email to yourself by clicking on the check box.

When you share a saved search with multiple people , you also have the option to allow all recipients see who else received the email. Mark the checkbox to the right of the "To:" area if you want this option enabled.

Editing a Saved Search

You may find that your saved search is not getting you the results you would like – maybe too many matches or two few. Instead of creating a new search query, you can simply edit your saved search.

To edit a saved search:

1) Locate your saved search query in the **Searches** area of your homepage.
2) Click **Select A Task** for your saved search and select **Edit this search.**
3) You are brought to the Advanced Search page where your existing search strategy is displayed in the appropriate search fields.
4) Make your modifications to your search query and click **Search** to run the new query.
5) From your new search results, click **Save your query**. Your original saved search name will be displayed. You can modify the name and alert options if desired.
6) Click **Save** when finished.

Viewing Saved Search Archives

COS Pivot maintains archives of your funding alert results. These archives show you the current week's alert results, as well as the previous three weeks' results.

To view the archives:

1) Locate your saved search query in the **Searches** area of your homepage.
2) Click **Select A Task** for your saved search and select **View archives.**
3) Locate the search you want to view past funding alert results for, click **Select a Task** dropdown menu, and select **View archives.**
4) Click on the date you wish to view.
5) The funding opps that matched your saved search are displayed by relevance, along with the amount, the number of faculty matched to that opp and upcoming deadline. Click on the opp title to see the full opportunity.

Viewing Saved Search Results

COS Pivot users have the ability to run their saved search at any time. When you run your search, you will be presented with a full set of search results which may be different from the original set of results you viewed, depending on whether any new or updated opportunities were added.

To run a saved search:

1) Locate your saved search query in the **Searches** area of your homepage.
2) Click the **Run** link for your saved search**.**

You can then track, tag or make active any of the search results.

To delete a saved search:

1) Locate your saved search query in the **Searches** area of your homepage.
2) Click the **Delete** link for your saved search**.**
3) Confirm the deletion by clicking the **Delete search** button.

Your saved search query and any alerting options previously established are removed and disabled.

Funding Alerts

Weekly **Funding Alerts** are automatically run on all of your Saved Searches in COS Pivot. These alerts present any new or updated opportunities that match your saved search query. Alerts are currently run weekly, on Sunday (Eastern Time). You have several options for viewing your weekly funding alert results:

- You can view your results directly in COS Pivot and/or
- You can opt to receive a weekly email alert

To view your weekly Funding Alert results:

1) Click on **Searches** from your homepage.
2) Locate the saved search from the list (if your saved search is filed in a folder, first expand the folder).
3) Click on the search **name**.
4) All funding opps that match your saved search query will be displayed.

To create an email alert for a saved search:

1) Locate your saved search query in the **Searches** area of your homepage.
2) To the right of the **Select a task** drop-down is the email frequency drop-down. By default it says **None** (unless you opted to receive an email alert when you initially saved the search query). Click on the drop-down and select **Email Weekly**.

Your weekly email alert will include the **Name** of the search, **Title** and **Sponsor** of each funding opportunity and a URL to view the full opp, along with an indicator if it is either new or limited submission.

Note: If *all* of your searches have no new search results, you will not receive an email that week.

Sharing Opps (and Opps Shared with You)

COS Pivot allows you to share funding opps as well as saved search queries with colleagues. In addition, your Research Office may send you opps they believe may be a good fit for your research and colleagues may even share funding opps with you.

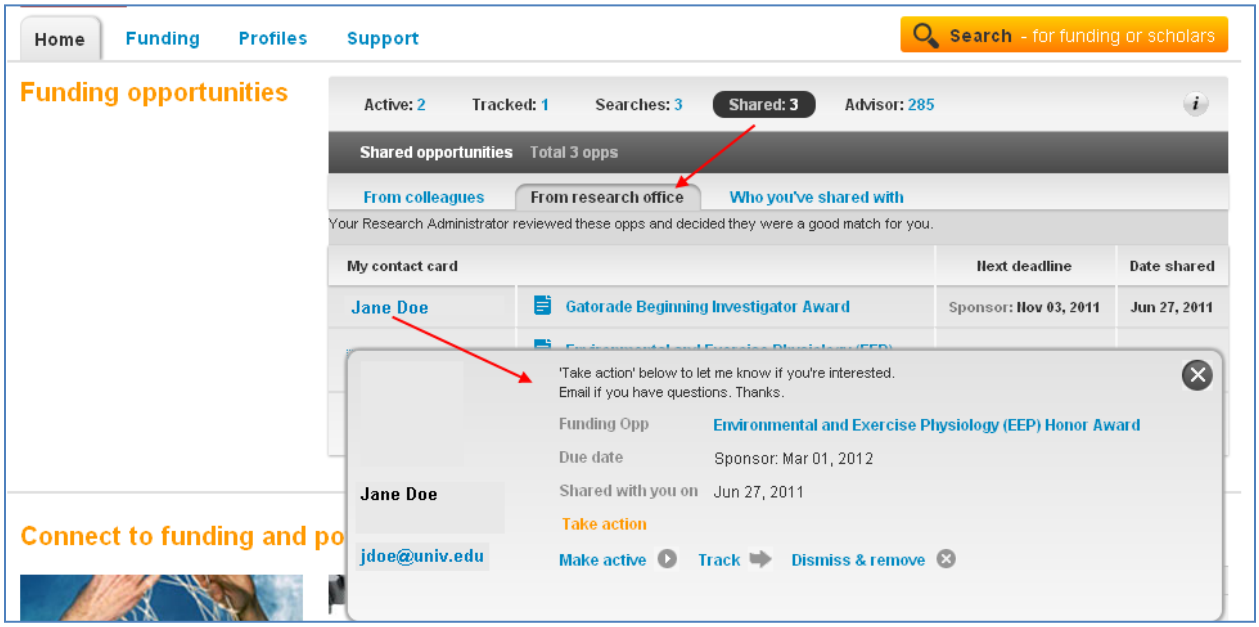
The **Shared** area of your homepage is where COS Pivot tracks:

- Opps shared with you by Colleagues
- Opps shared with you by your Research Office
- Opps you have shared with Others

The **Shared** button displays the total number of opps shared with you and by you.

By default, the opps shared **From colleagues** to you are displayed. You can click on **From research office** or **Who you've shared** with to open those summary areas. The three areas display the same type of information including:

- A **Contact Card** - Information on the sender, actions that can be taken and a message from the sender (optional)
- The **Title** of the opp they shared (which is a link back to the full opp)
- The **Abstract** icon (clicking on it displays the opp abstract)
- the next **Deadline** for the opp
- and the date the opp was shared with you



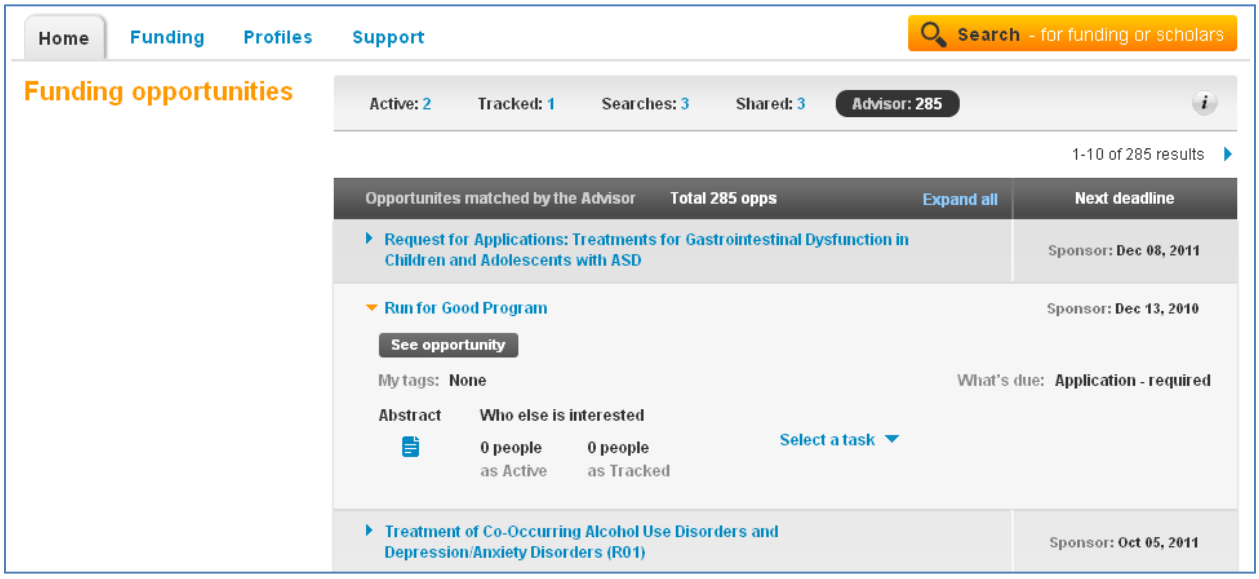
Opps shared with you are displayed with the most recently sent opps displaying first.

Clicking on the **Contact Card** displays the:

- Name, email address and phone number of the person who sent you the opp (in some cases even a photo)
- Funding Opp name (click on it to see full opp), deadline and date sent
- **Take Action** area where you add the opp to your **Active** or **Tracked** area of your homepage or **Dismiss and remove** the opp.
- Optional Message from the sender visible by clicking **Message Attached** at the bottom of the contact card. If no optional message was included, you will not see **Message Attached**.

COS Pivot Advisor

The **Advisor** is COS Pivot's intelligent mapping at work – analyzing your **Profile** and matching you with funding opps. The **Advisor** analyzes several areas in your profile (statement of Expertise, publications, CV information, abstracts and more) and also analyzes all of the funding opportunities and presents you with matches, some which you may not have found through simple searching. The more detail included in your profile, the better the **Advisor** matches will be.



In addition to accessing **Advisor** matches from your homepage, there is also a section in you **Profile** called **Funding Match** which will display the same group of recommended opps.

You must **Claim you profile** in COS Pivot in order to receive matches from the **Advisor**. See the Help file on **Profiles** in the **Support** area. If you do not have a profile you will not see the **Advisor** on your homepage.

The **Advisor** button will display the total number of opportunities matched based on your **Profile**.

Advisor matches are displayed based on relevance or match quality with the most relevant matches displayed first .

Initially, you will see the **Title** of the opp and the next **Deadline**.

Clicking on the **Title** in the **Advisor** area will display additional information including:

- Sponsor deadline
- What's due next (application, proposal, letter of intent, etc.)
- Any tags you have assigned to the opp
- Quick access to the abstract for the opp
- Who else is interested in the same opp within your organization (either **Tracking** the same opp or marking it as **Active**)
- Task options (where you can make an opp **Active**, **Track**, **Share** or review who you've shared it with)

Clicking on the **See opportunity** button takes you to the full record.

You can expand all your **Advisor** matches by clicking on the **Expand All** link.