COS Pivot Funding Homepage and Searching

The Funding Homepage of COS Pivot enables users to see Top Funding Picks from the Editorial team, Funding News, the most popular Funding Opportunities from a given week, as well as information about your saved records and searches.

You can also conduct a Quick search, a Sponsor search or and Advanced search from the Funding homepage.

Below the search box, you’ll also find handy links back to various areas of your COS Pivot Homepage:

- Active opps
- Tracked opps
- Saved Searches
- Opps you shared
- Opps shared with you
Quick Search

The COS Pivot Quick Search is an easy way to make a broad search of the funding opportunities available. There are two options for quick searching:

- **By Text**
- **By Sponsor**

**By Text** – Searching for funding by text allows you to easily search across all fields in a Funding Opportunity providing you with broad search results. Boolean operators AND, OR, and NOT can be used within the text search box. Use quotations for exact phrase searching.

Examples:
- *Baseball AND Football* will retrieve all records containing both the words baseball and football.
- *Baseball OR Football* will retrieve all records containing either the words baseball or football.
- *Baseball NOT Football* will retrieve all records containing the word baseball without the word football.
- *“Baseball Football”* will only retrieve records containing the exact phrase “baseball football.”

**By Sponsor** - Searching by sponsor allows you to search our entire list of sponsors using the blank space provided or to browse the sponsor list alphabetically by: All Sponsors, US Federal Sponsors, or Non-US Federal sponsors. To search for a specific sponsor and find all open opportunities from that sponsor, type the sponsor name in the blank space.
Note: Many Sponsor names are listed under the name of their larger controlling entity.

Examples:

- The National Institutes of Health (NIH) is listed as one of the departments in the United States Department of Health and Human Services, under "U".
- The Joint Research Centre (JRC) is listed under "E" for European Commission.

To browse the sponsor list alphabetically, click on your choice of sponsor subsets—All Sponsors, US Federal Sponsors, or Non-US Federal sponsors. Please note that if the sponsor name is hyperlinked, the sponsor currently has open opportunities. Clicking on the hyperlinked sponsor name will take you to all open opportunities available from that sponsor. If you see a sponsor name in gray, the sponsor does not currently have any open opportunities, but they are a sponsor that we monitor and for which we may have something available in the future.
Advanced Search

The Advanced Search allows you to construct a targeted, field-specific search using search boxes, browsing windows, and pick lists. The rows of text boxes at the top of the page can assist you in creating a Boolean search using OR and AND. Note that the text boxes in a single row are connected by OR and multiple rows are automatically AND-ed together by default.

Note: There are no required fields for conducting an Advanced Search. Enter only information in those fields you wish to search.

Boolean Operators AND, OR, and NOT, can be used within any search field.

- **Baseball AND Football** will retrieve all records containing both the words baseball and football.
- **Baseball OR Football** will retrieve all records containing either the words baseball or football.
- **Baseball NOT Football** will retrieve all records containing the word baseball without the word football.

To Conduct an Advanced Search:

1. Choose a matching option. These options allow you to either narrow or broaden your search criteria depending on your selection.

   **Match all Fields**
   This will retrieve records including ALL of your selected search criteria. This is similar to the Boolean operator AND. This is the default option and is used unless another option is selected.

   **Example:** Selecting *AIDS* as a KEYWORD and selecting *Private Foundation* as the SPONSOR TYPE will retrieve all funding opportunities dealing with AIDS from private foundations.

   **Match Any Field**
   This will retrieve records including ANY of your selected criteria. This is similar to the Boolean operator OR.

   **Example:** Selecting *AIDS* as a KEYWORD and typing *National Institutes of Health* in the SPONSOR field will retrieve all funding opportunities that have the COS keyword AIDS, as well as all funding opportunities from the National Institutes of Health, whether or not they fund AIDS research.
2. Make a selection from the drop-down (All fields, Abstract, Title, Sponsor, Sponsor ID). Complete as many boxes and rows as needed. You can include additional rows by clicking on the Add another row link.

3. In the Search Fields area, enter the information in the fields relevant to your search. By default, Amount, Deadline, and Limited Submission/Internal Coordination are displayed. You can include Activity Location, Citizenship, Funding Type, Keywords, or Sponsor Type by clicking on the More search attributes at the bottom of the section.

4. At the bottom of the page, you can exclude fields from your search. You can exclude any combination of terms. Additionally, you can exclude other fields by clicking on More search attributes.
Field Descriptions

COS Pivot allows you to save your search queries. When a search query is saved, we will automatically provide a weekly funding alert that identifies 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.

All Fields

All Fields permits full text searching across all available text fields (including Title, Abstract, Keyword(s), Requirements, Citizenship, Funding Type, Activity Location, Sponsor Type, Sponsor, Opp ID and Agency). If there is a term or concept for which you are searching but are uncertain exactly how it would be used, or in which field(s) it would appear, you may wish to try searching for it in All Fields. This approach will result in the broadest possible search of the database. After seeing how your term is used in your retrieved records, you may wish to try entering it in some of the other individual fields that are provided in the search interface (see below). In general, using these fields will increase the specificity and precision of your search.

Sponsor

The Sponsor is the name of the organization that provides or administers program funding. Federal sponsors may be listed (and searched) under their governmental agency (e.g., United States Department of Health and Human Services) or under a more descriptive division (e.g., National Institutes of Health, instead of United States Department of Health and Human Services) that is more easily identified as a program sponsor.

**Note:** Most U.S. Federal government sponsors are listed under 'U' (i.e., "United States Department of...") in the Search or Browse Sponsor Lists.

Title

The Title is the name assigned to the specific Funding Opportunity. In the absence of an official, sponsor-supplied title, a descriptive title may be added by the COS technical editors. All individual terms in this field are searchable.

Abstract

The Abstract provides a general description of the Funding Opportunity. The Abstract field may include information that also appears in other fields. All individual terms in this field are searchable.
Sponsor ID

The Sponsor ID field allows you to search for full or partial U.S. Government ID numbers from the following organizations: National Science Foundation (NSF), National Institutes of Health (NIH) and the Department of the Defense (DOD).

Amount

The numeric Amount field can be searched to identify opportunities for an exact amount of funding or for more (or less) than a designated amount. To search the Amount field, first select either "More than" or "Less than" from the drop down menu. Then enter the desired amount. Numbers must be entered without dollar signs and without commas. For example, to search on the amount $12,000, enter 12000. The search engine will not correctly search on $12,000, $12000, or 12,000.

Deadline

The Deadline field contains deadline information as it is made available to COS. When a series of deadline dates for the processing of an application is provided, all mandatory deadlines are included in this field as well as any optional deadlines. Please note that deadline dates are subject to change. The sponsor contact (see Contact Information) can confirm deadline dates.

Deadline Type indicates the level of submission, whether it is, for example, an Expression of Interest, a Full Proposal, a Nomination, or an Application.

The Mandatory column indicates whether a sponsor requires this submission type or if it is optional. For example, a Letter of Intent (LOI) may be marked No, but strongly suggested.

Invite Only indicates whether an application or proposal, etc., must be invited by the sponsor. For example, a Stage 2 Application Type that is only accepted if invited from a Stage 1 application.

To search the Deadline field:

- You can use the “deadline within” option to search for opps that have deadlines within
  o 7 days from today
  o 30 days
  o 90 days
- You can choose the “select from calendar” radio button to search for a specific date or date range:
Use one or both of the "on-or-after," "on-or-before," or "on" menus, and the Month, Day, and Year pick lists provided in the search interface to signify the desired time frame.

Fill in as much information as possible for the most accurate results.

A year must be chosen (in the date lines used) or the deadline criteria will be ignored.

- If the month is left empty, the system will default to January 1st and ignore any day chosen.
- If the day field is left empty, the system will default to the first day of the month chosen.
- **Example:** If "2013" is chosen as a year and the month and day fields are left blank, the system will search for the deadline date of 1 January 2013 (20130101).

**Optional Deadlines:**

Optional deadlines are any part of a submission that is not required to effectively submit a proposal. Common examples of optional deadlines are letters of intent and draft deadlines. Optional Deadlines are included in any deadline searching by default. Click in the box to de-select this option.

**Continuous or Undefined Deadlines:**

This refers to grants that either do not provide deadline information or that indicate an open or continuous deadline. There is a check box for this option that is not selected by default when a deadline date is searched. Click in the box to select this option.

**Limited Submission/Other Internal Coordination**

You can choose "Limited Submission" or "Other Internal Coordination Required" as options in your search.

**Limited Submission:** For some opportunities, sponsors accept only a specified number of proposals or applications from an institution. This checkbox allows you to limit your search to just those opportunities. Further information about the limit on submissions is detailed in the deadline note field of each record.

**Other Internal Coordination:** Limits your search to include opportunities that require some coordination at the university level prior to the sponsor deadline. This might be a ranking requirement, a limit on the number of times an applicant may submit, or some other special requirement by the sponsor. Further information about internal coordination detailed in the deadline note field of each record.
Activity Location

Activity Location identifies any requirements about where the grants may be used. Click on the 'More Locations' link to open a box to browse listings of valid location terms. The Activity Location Browser includes continents and political or geographic groups (e.g., UN, NATO, Commonwealth), as well as individual nations. Click on the folder or the symbol to see a list of more specific terms. Click on the hyperlinked term itself to add it to your search (the term will automatically be added to the Activity location field of the main search interface). The Plum icon indicates that the term is the most specific available. This browser operates on the same basic principles as the Keyword Browser. Refer to the Keyword section for more information.

You can also type the location that you are looking for in the search box. The auto-complete will suggest any matches we have in our system. Click on the location name to add it to your search form.

There are also check boxes for including records with unrestricted or unspecified location information, as well as for Sub-Entities and Super-Entities (see descriptions below):

- **unrestricted**: the sponsor has stated that the field does not have restrictions attached to it.
  - Example: Searching for "France" in the Citizenship field with the unrestricted option checked will include grants for both French citizens, as well as grants where the citizenship requirement field has no restrictions (i.e. the sponsor has stated that it is open to citizens of any country).
- **unspecified**: there is no information provided by the sponsor for the field.
  - Example: Searching for "Brazil" in the Citizenship field with the unspecified option checked will include grants for both Brazilian citizens, as well as grants that do not have any citizenship requirement information.

**Note:** If you click in one of the options' check boxes without entering anything in the search box above it, only opportunities with unspecified or unrestricted information will be returned with your search.

- **Sub-Entities** refer to any locations (i.e. narrower terms) that may be a part of a larger entity than the one(s) selected.
  - Example, if you chose "United States" as an activity location, sub-entities would include all the individual states.
- **Super-Entities** refer to broader locations or groups on the Activity Location Browser hierarchy.
  - Example, if you chose "France" as a location, super-entities would include "Europe" and "NATO" as well.

The Entities options are activated by default when a term is chosen from the Activity Location Browser.
Click on an option's check box to select or deselect the feature.

If you select multiple activity locations be sure to select either the **Match all of the fields below** or **Match any of the fields below** radio buttons.

**Citizenship or Residency Requirement**

Defining a search using the Citizenship field will return all funding opportunities available specifically to citizens or residents of the chosen country(s) as well as the opportunities whose citizenship requirements are unrestricted or unspecified. To select more than one option, hold down the *Ctrl* key on your keyboard (the *Apple* key for Mac users) and use your mouse to click. Please note that while awards designated as being for U.S. institutions only are classified under "United States", foreign researchers at U.S. institutions may be able to apply for such awards through their institution. For example, if research funding not available to individuals is awarded to the biology department at a U.S. university, a French citizen studying biology, or working in the biology department at that university could receive funding from that award through the department.

Some sponsors do not have citizenship requirements, but do require that the research be done in a particular part of the world (see activity location field).

You can include the option to include records with “unrestricted” and/or “unspecified” citizenship requirements. See the descriptions for these below.

**Funding Type**

The Funding Type field describes the type of activity or activities a Sponsor is willing to support for a particular Funding Opportunity. To select more than one option, hold down the *Ctrl* key on your keyboard (the *Apple* key for Mac users) and use your mouse to click. The Funding Type picklist is as follows:

- **Artistic Pursuit**: funding for the presentation of artistic work, for example a performance, exhibit, or film or video production.
- **Collaboration or Cooperative Agreement**: funding for any collaborative activity between people working at two or more institutions or in two or more disciplines.
- **Contract or Tender**: funding for an agreement to conduct a specific project or task with stated outcomes (as opposed to a general research effort or program development).
- **Dissertation or Thesis**: funding for research or other activities related to the completion of a doctoral dissertation or graduate thesis.
- **Equipment or Materials Acquisition or Facility Use**: funding targeted toward the purchase or use of equipment, materials, or special facilities required to conduct research. Included would be the purchase of computer equipment, payment for the use of a facility's telescope, leased time on a supercomputer, use of library facilities or special collections and use of art facilities (colonies, studios). Not included would be general expenses related to research.
- **Facility Construction or Operation**: funding to construct, remodel, or operate a facility.
- **Meeting or Conference or Seminar**: funding to either attend or organize a meeting, conference, or seminar.
- **Postdoctoral Award**: funds for individuals who have recently received PhDs to perform research or study, usually under the guidance of a mentor, but sometimes not in the humanities or social sciences.
- **Prize or Award**: monetary or other awards presented in recognition of past or current accomplishments in the arts, sciences, or humanities.
- **Program or Curriculum Development or Provision**: funding to develop or provide a program to benefit the public, or to develop or provide a curriculum, a course, or other types of training or instruction for the public or for those in a traditional educational setting.
- **Publishing or Editorial**: subvention for publication costs of journals, manuscripts, texts, documents, and translations of works.
- **Research**: funding for activity that increases overall knowledge about a field.
- **Training or Scholarship or Fellowship**: funding in the form of scholarships, internships, fellowships, or specialized training that advances the individual's knowledge of the area, not the area itself.
- **Travel**: funds for travel expenses arising from programs or activities such as (but not limited to) visiting lectureships or professorships, exchange programs, on-site observation, or research activities.
- **Visiting Personnel**: funding to either be or host a visiting expert.

A doctoral student might select **Training or Scholarship or Fellowship** and **Dissertation** in order to access the maximum number of Funding Opportunities appropriate for doctoral research. A film maker wishing to actively participate in an important national or international meeting that would increase his or her knowledge of film practice might select **Travel** in order to find sources of funding for travel expenses to and from the event. Choose as many **Funding Types** as necessary to adequately describe your interests. If you feel that your results set is too large, go back to the search interface and narrow your search strategy as necessary.

**Keyword**

The Keyword field utilizes a large body of controlled vocabulary terms. These COS keyword terms succinctly describe the areas to which Funding Opportunities pertain. Terms associated with other standard controlled vocabulary lists may translate into, or be included in, COS keywords.
You can view the COS keywords through the Pivot Keyword Browser which functions as a browsing interface. Click on the Browse button in the field box to open a separate keyword browser window.

**Browsing the Keyword Hierarchy**

When you choose to browse the keyword hierarchy the keyword browser will open on your screen. You can browse up and down through the hierarchy like you can through folders and documents in a personal computer file manager. The terms start with the broadest possible headings and step down to the narrowest subheadings, using the following features:

- **Folder** - a folder icon indicates that there are terms below that term in the hierarchy. Click on a folder to see the next level of terms.
- **Plum** - a plum icon indicates that this is the last term for this branch of the hierarchy.
- **Keyword Hyperlink** - click on the term itself to add it to your search.
- **+/- signs** - these indicate which way you will be going in the hierarchy when you click on the folder. A plus sign means you will be going down to narrower terms, and a minus sign means you will stepping up to broader terms. You can also click on these symbols to move up or down in the hierarchy.
- **Cross-Reference Terms**
  - **USE**
    Tells you which COS Keyword to use in place of the entry term that appears. For example, Customer Service **USE** Consumer Services. Customer Service is the entry term. Consumer Services is the COS Keyword.
  - **USED FOR**
    Tells you that this COS Keyword is used instead of the entry term that appears. E.g., Consumer Services **USED FOR** Customer Service
  - **USED FOR+**
    Indicates that this COS Keyword is used in tandem with another COS Keyword to represent a compound term or phrase. E.g., Archaeology **USED FOR+** Urban Archaeology. The corresponding cross-reference would be: Urban Archaeology **USE** Archaeology **AND** Urban Studies.

You can also use the keyword search box to type in a term to search for a particular keyword.
Searching for Keyword Terms

If you are unsure about the location or exact syntax of a keyword term, you can use the search box in the middle frame to find particular keywords. Begin typing the term or terms that you would like to search for, and a list of all keywords matching your search terms will appear. Click on the keyword or keywords from the list to add them to your search form. You can add multiple keywords using the Search functionality.

Exploding Keywords

Keywords can also be exploded. If you have the explode function on, for those Keywords you have selected to use in your search, all of the subheadings below them in the hierarchy are also added to your search (i.e., when you click on a yellow folder next to a term this displays the subheadings, or more specific terms). It is a way to broaden your search within the area of interest.

- **Example:** If you choose the keyword *Education*, the explode function would include all the narrower terms from the hierarchy in the search, including "Mathematics Education", "Higher Education", etc.

**Note:** when keywords are added to the search query through the browser, the explode function is activated by default. Click in the explode check box to turn this option off.

Requirements

The Requirements field describes who the applicant must be to be eligible for a particular opportunity. Please note that this field identifies those applicants who qualify for a Funding Opportunity rather than Funding Opportunities about a certain type of individual.

To select more than one option, hold down the *Ctrl* key on your keyboard (the *Apple* key for Mac users) and use your mouse to click. Making no selection will leave this field out of the search query.

The Requirements list of options is as follows:

- **Academic Institution**
- **Commercial** (any business or corporation)
- **Government**
- **Graduate Student** (anyone currently in graduate school working on a master’s degree or doctorate but who has not yet received a doctorate; also appropriate for undergraduate students looking for funding for upcoming graduate studies)
- **Minority** (opportunities for which minorities ONLY may apply; this includes minority institutions, or minority-owned businesses; for U.S. sponsors, minority is defined in terms of U.S. government guidelines or standards; likewise for non-U.S. opportunities those countries’ national guidelines or standards are applied)
New Faculty/New Investigator (denotes experience and encompasses professionals at various levels considered “inexperienced” or “emerging.” "New" does not denote an age or age range. Such opportunities include postdoctoral awards; new, young, emerging, and early career investigator awards; or junior faculty awards. The requirement is used across all disciplines within the Pivot Funding database. For example, an emerging artist award will be classified as "New Faculty/New Investigator"; as will a young investigator award for cardiopulmonary chest medicine. Use of the requirement is based solely on the sponsor's listed criteria, including Nonprofit

Persons With Disabilities (opportunities for which disabled individuals ONLY may apply)
PhD or MD or Other Professional (anyone who has a doctorate or is considered a professional in his or her field without having a doctoral degree, e.g. artists, architects, lawyers, journalists, nurses, librarians, etc.)
Undergraduate Student (anyone currently in school working on a bachelor's degree)
Women (opportunities for which women ONLY may apply)

It should be noted that if only "Minority", "Women", or "Persons With Disabilities" is selected from the Requirements list, some Funding Opportunities for which the searcher qualifies would not be retrieved. For example, if a female graduate student selected only Women, she would not find records available for all graduate students even though she, as a graduate student, would qualify for those Funding Opportunities as well.

Note: Eligibility is different than Requirements as used here. It refers to the specific text field in each citation giving general stipulations for eligibility not covered in the Requirements field.

Sponsor Type

The Sponsor Type field contains the classification of a sponsor for a Funding Opportunity. To select more than one option, hold down the Ctrl key on your keyboard (the Apple key for Mac users) and use your mouse to click. The Sponsor Type list is as follows:

Academic Institution (any college or university)
Commercial (any business or corporation)
Federal, U.S. (United States government entities only)
Multinational Organization (International organizations, e.g. NATO, UN, World Bank, etc.)
National Government, Non-U.S. (any non-U.S. government agency)
Other Nonprofit (any organization which is prohibited by law from distributing any of its income to organizational members, directors, or officers)
Private Foundation (any not-for-profit organization established by endowment)
• Professional Society or Association
• State, Province, or Local Government (any agency or unit of government)

Please note that sponsoring organizations having the word "foundation" in their name do not necessarily fall under the category of Private Foundation. For example, the National Science Foundation is classified under "Federal, U.S.".

If you want to find only those Funding Opportunities offered by private industry, select Commercial. For U.S., foreign federal, or state or province grants, select Federal, U.S., State or Province, and Federal, Non-U.S.
Search Tips

- If you are unsure what field to search in, use the All Fields (Quick Search) search box. This will search for the terms you enter across all text fields in each record.
- Many grant sponsors do not mention specific kinds of research they will fund. Instead they state broader disciplines within which they will consider applications. Some research topics may not get any results in searching, but that does not necessarily mean there are no grants for which the project may be eligible. If this happens, try searching for grants in the broader field(s) within which your project falls. For example, a project to study zebra mussels may be eligible under a grant looking to fund projects in the broader fields of Biological Sciences, Marine Biology, or Environmental Biology, etc.
- To search by Opp ID use the All Fields box on the Quick Search.
- Keywords 'Explode' function: Use this to expand your Keyword search. For example, if you are searching on the Keyword 'Education' and Explode it, the system will automatically search for all the more specific 'educational' terms under it in the Keyword hierarchy, such as 'Higher Education', 'Literacy', etc. For more details, see the Keyword section.
- To select multiple terms from any pick list (e.g. Sponsor Type, Citizenship, etc.), hold down the Ctrl key on your keyboard (the Apple key for Mac users) and click on the terms you want to select.
- Use Truncation (Asterisk), Proximity Operators (pre/#, w/#), Exact Phrase Searching (Double Quotes), and Precedence (Parentheses) to give your search more flexibility.
  - Example: (gene w/2 mouse) or "mouse genome" -- searches for the word "gene" within 2 words of "mouse" or for the exact phrase "mouse genome."
- Searches are case insensitive. Using either upper or lower case letters will yield the same result set.
- With the exception of the hyphen, do not use punctuation marks (slashes, commas, etc.). Punctuation marks in most cases will retrieve erroneous results. This also applies to the Amount Field. For monetary amounts, leave out any commas or periods. E.g.: $10,000 = 10000.
- Do not use the articles a, an, or the. The search engine does not search for these.
Navigating Your Search Results

After you run your search, you are presented with a list of results along with some options for refining your results taking actions for any funding opps you are interested in. Let’s first take a closer look at how your funding search results are displayed.

Search Results List

Whether you conduct a quick search by text or sponsor, or an Advanced Search, your funding opps results are displayed in a variety of ways to help you best locate the funding opportunities relevant to your needs.

After conducting your search, your results are displayed like the example below. The search results page is separated into two areas – the main search results, and on the left side of the page, the faceted search results. The main list of results is a list of funding opportunities available based on your search query in the main viewing pane of the page. These results are initially displayed by relevancy. The faceted search results give you a view into your overall results organized by category (Submission Type, Top Sponsor Types, Top Funding Types, Top Requirements and Top COS Keywords) which identifies those search results that are most heavily represented.

Each row represents one funding opp and displays high level information about each opp: Title, Sponsor, Deadline, and Amount. Near the top right of the main results list you’ll see the total number of results, with each page showing 25 of the opps. At the bottom right of the page you can use the “next,” “previous,” and “last” options to page through your results.

Click on the opp title to see the full opportunity.
Sorting - The default sort of your Funding Opps results is by relevancy, noted as “Relevance” at the top of the results table. The higher on the list an Opp appears, the most it’s “relevance,” or, the most it matches your search terms. You can modify the sort order on your results list by clicking on any of the other items found across the top of the results table: Opp Title, Sponsor, Deadline, or Amount. Clicking any of these will rearrange your results accordingly.

Mouse-overs - Each of the three areas of the main results list has an icon associated with it. To the left of the titles of the Opps you’ll see an icon that looks like a piece of notebook paper 📝. Clicking on that will open a light box that displays the Abstract and Eligibility of that Opp. Click on the “X” in the upper right of the box to close it. Next to the Deadline field is a calendar icon 📅 that will open a light box with deadline information in it when clicked. And finally, the Amount field icon 💰 displays grant amount information.
Search Results Tools (Active, Track, Share, Export)

You can perform several actions to any or all of the funding opps in your search results list. Near the top right of the page you will see a box with three Tools:

- **Put opp on** (with an arrow indicating a dropdown list)
- **Export details**
- **Share with faculty**

**Put Opp On:** Click the arrow to display a short dropdown list in which there are two choices:

- **Add to active:** To add a record(s) to your Active list located on your homepage you must first select the records below in your results list.

  To select one or more records, just click the check box to the left of the opp title. To select all 25 on the page, you can click the check box at the very top of the column of check boxes. When your desired records are selected, click the Add to active option in the Tools box. A light box will appear asking you to add a Tag for the Opp(s) you chose. Tagging is optional, but it will give you a convenient way to identify these records on your Active list. You can also choose from any pre-existing tags you’ve used in the past. You can select as many as you’d like. By default, you will receive an email when an update is made to that specific opportunity. Deselect this option if you do not wish to be notified when updates are made. When you’re done tagging, click the Track button. When you receive verification you can close the light box by clicking the “X” in the upper right corner. The selected opps are now being tracked in your Active area on your homepage.

- **Add to tracking:** To add a record(s) to your Tracked list located on your homepage you must first select the records below in your results list.

  **Note:** If you are already tracking an opp on your Active or Tracked list, COS Pivot will display On active list or On tracked list within the full opportunity itself it the Tools area.

  To select one or more, just click the check box to the left of the opp title. To select all 25 on the page, you can click the check box at the very top of the column of check boxes. When your desired records are selected, click the Add to tracking option in the Tools box. A light box will appear asking you to choose a Tag for the Opp(s) you chose. Tagging is optional, but it will give you a convenient way to identify these records on your Tracked list. You can also choose from any pre-existing tags you’ve used in the past. You can select as many as you’d like. By default, you will receive an email when an updated is made to that specific opportunity. Deselect this option if you do not wish to be notified when updates are made. When you’re done tagging,
click the “Track” button. When you receive verification you can close the light box by clicking the “X” in the upper right corner. The selected Opps are now being tracked in your Tracked area on your homepage.

**Note:** Tags have a 20 character limit. Spaces are not allowed in tags -- multiple words must be connected with an underscore “_”, period “.”, dash “-“, or alpha numeric characters “A-Z, a-z, 0-9”.

**Export Details:** To export a record or set of records, select the opps you want by clicking the check box to the left of the Title. To select all 25 on the page, click the check box at the very top of the column of check boxes. Click **Export details** in the Tools box and a light box will appear, giving you the ability to choose the format of your export, as well as the details.

There are three formatting options:

1) **HTML (Display Only)** - Use this to display results on your browser in an easy to read, table format for viewing or printing. You can also save your results in HTML format by using the 'save’ function in your browser.

2) **ASCII Text** - This is a standard field-tagged text format that can be read by most word processing software and some citation management packages.

3) **Tagged Text** - This is a field-tagged text format that can be used with most word processing software.

Then you can select the content of your exported opps:

- **Full Record** - The download will contain each field in a funding opps record.
- **Standard Fields** - The download will contain the **Title**, **Sponsor**, and **Deadline** of the opp.
- **Select your Fields** - Customize the export by checking which fields you’d like included.

Finally, you can choose to select the **Include Search Strategy** option (this option can only be used with the HTML and ASCII Text formats). When it is selected, the search query you entered to get the current results will be saved or displayed along with the results themselves.

**Note:** You can check and download records across multiple pages of results. If you want all your results downloaded, and you have more than one page of 25 results, you must perform the above **Export details** steps for each page. As each new page of results displays, it will grow in size, incorporating each new page of 25 results.

**Share with Faculty:** The sharing tool located on the results page acts like the sharing option you have on your homepage, but it is conveniently located on the results page so
you can share funding opps of interest right away. First, select the opps you want to share. To select one or more, just click the check box to the left of the opp title. To select all 25 on the page, you can click the check box at the very top of the column of check boxes. When your desired records are selected, click the Share with faculty option in the Tools menu and a light box will appear.

There are four items to fill out on this page:

1) **Recipients:** Enter in the name of the first person with whom you’d like to share the Funding Opp(s). As you type, Pivot will attempt to find a name match at your institution. If the match appears, just click on the name. If no match appears, simply type in the email address. To add another name or email, press the Tab key and type in the new name/email address. You can also select a pre-defined group as your recipients. Click on the group name in the Your groups for sharing area or create a new group from the names already entered by clicking Save names as new group and entering a group name.

2) **Customized message:** Use the text box below the email fields to type in a personalized message that your recipients will see.

3) **Copy:** You can also choose to receive a copy of these shared Opps by clicking the Send myself a copy button.

4) **Privacy:** Click the box labeled, If sharing this opp with multiple people, let each recipient see who else received this from you if you want to display for each recipient who the other recipients are.

Click the Share button at the bottom of the box and a confirmation screen will appear to let you know your opps have been shared.

**Default Activity Location and Citizenship/Residency Requirements**

On the left side of the page, you may see that your search results are automatically filtered by an activity location(s) filter and/or a citizenship and residency location(s) filter. These default settings were established by your local COS Pivot Research Administrator to assist in providing you with locally-relevant funding opportunities based on your geographic location. You can remove these automatic search criteria by clicking on the “x” next to the location you wish to remove and your funding search results will reflect the change.

You can add additional activity location and citizenship and residency locations by refining your query and selecting additional areas on the advanced search page.
Faceted Searching

On the left side of the Results page is the Faceted Search Results list. Within each Faceted Search category (Submission Type, Sponsor, Funding Types, Requirements, COS Keywords), the top 5 results are displayed in sub-categories, along with the number of records in your search results that the sub-category appears. Sub-categories are listed in decreasing order of frequency. Some advantages of Faceted Searching are:

- It provides you with a quick view of the types of records that appear most often in your funding search results.
- You can drill down within your search results without entering a new search query.
- The results are easily accessible and occur on every set of search results.

Note: The number of records displayed for each sub-category may not total the same amount as your overall search results. Some records may not be included in the Top 5 sub-categories, and others may be included multiple times, based on the information in the funding opportunity record.

Faceted Searching continually updates as you choose various facets. For example, after running your search query, click on the first sub-category within the Top Sponsor Types. Your set of results will refresh and you'll notice that the Faceted Search boxes also change, reflecting the new numbers associated with the subset of records you have just selected. To remove a chosen sub-category, just deselect the sub-category’s box.

Saving Searches

At the top of the search results page is an option to Save your query. This option lets you save an entire search to your homepage so that you can monitor it and, if you choose, receive a weekly Funding Alert on the search. If you would like to save a search, simply click the Save your query option at the top of the results page and choose a name for your search. If you would like to receive a weekly Alert on the search, leave the box checked, and hit the Save button. You’ll get a confirmation screen that lets you know your search has been saved to your homepage, in the your Saved Searches area.

Viewing and Refining Your Search

At the top of the search results page are options to refine your query, as well as to view your query. If your search is too broad or too narrow, you can modify your search by selecting Refine your query. This will take you back to the search page where your original search criteria are still entered. You can modify these as necessary and re-run your search.

To view your search criteria, choose the Show your query option, and the search string will appear. Click Hide query to remove the search string.
Managing Individual Funding Opportunities

In addition to managing funding opps from your search results list, you can also manage individual funding opportunities from the full funding opportunity record.

Viewing an Opportunity

Clicking on the title of any opportunity in your search results list will display the complete funding opportunity. Individual funding opportunities include:

- **Full Detail** field that gives the Web address of the record in order to link directly to it from an outside source. This information is located near the top of the funding record.
- **Upcoming Deadlines** section shows sponsor deadlines as well as any entered by your Research Department.
- **Potential Collaborators** (more on this below)
- **Tools** located near the upper right of the record containing important tasks you can perform for a given record.

*Note:* Some fields of information are very lengthy so we only display a portion of the information. Click on the ‘more..’ hyperlink to see the complete information for a section.

Potential Collaborators

Within each record you will see the **Potential Collaborators** section. In this area, COS Pivot shows you the people, both inside and outside of your institution, with whom you might have a potential collaboration opportunity. Clicking either button will display a table of peoples’ names (along with their titles—if available—and their current institutions) which are hyperlinked to that person’s Profile. The people in this list have been identified by COS Pivot, through a proprietary algorithm, as possibly having some interest in the particular record which you are viewing. You can choose any one (or more) of these people and share the funding opp with them. Just select the box to the left of the name of the person (or people) with whom you’d like to share the opp and click the **Confirm and Add Message** button at the bottom.

A light box will appear. There are four items to fill out on this page:

1) **Recipients:** The names of the selected recipients will be displayed.
2) **Customized message**: Use the text box below the email fields to type in a personalized message that your recipients will see.

3) **Copy**: You can also choose to receive a copy of these shared Opps by clicking the **Send myself a copy** button.

4) **Privacy**: Click the box labeled, **If sharing this opp with multiple people, let each recipient see who else received this from you** if you want to display for each recipient who the other recipients are.

Click the **Share** button at the bottom of the box and a confirmation screen will appear to let you know your opps have been shared.

**Tools**

**Put Opp On**: On each opp page is a list of **Tools** near the upper right of the page. If the record you are viewing is not currently being tracked on your homepage, you’ll see a gray dropdown list labeled **Put opp on**. If you’d like to add this Opp to the list of records you’re tracking, click that dropdown arrow to select **On tracked list**. If you’d rather have this opp on your **Active** list on your homepage, select the **On active list** option here. By default, you will receive an email when an update is made to that specific opportunity. Deselect this option if you do not wish to be notified when updates are made. After you’ve made your selection, the screen will refresh and your choice will be at the top of the **Tools** list (either **On tracked list** or **On active list**).

**Note**: If you are already tracking an opp on your **Active** or **Tracked** list, COS Pivot will display **On active list** or **On tracked list** within the full opportunity itself in the **Tools** area.

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**Share with faculty**: The ability to share an Opp works just like the **Share with faculty** option on the funding **Search Results** page. Click **Share with faculty** and you’ll see a light box where you can add the names/emails of the people with whom you’d like to share this opp. There are four items to fill out on this page:

1) **Recipients**: Enter in the name of the first person with whom you’d like to share the funding opp. As you type, COS Pivot will attempt to find a name match at your institution. If the match appears, just click on the name. If no
match appears, simply type in the email address. You can also select a pre-defined group of recipients by clicking on the specific group name below the Recipients box.

To add another name or email, press the Tab key and type in the new name/email address. To create a mailing group, simply enter the email addresses in the Recipients box and click “Save names as new group”. You’ll be prompted to name the group for future reference.

2) **Customized message**: Use the text box below the email fields to type in a personalized message that your recipients will see.

3) **Copy**: You can also choose to receive a copy of these shared opps by clicking the **Send myself a copy** button.

4) **Privacy**: Click the box labeled, **If sharing this opp with multiple people, let each recipient see who else received this from you** if you want to display for each recipient who the other recipients are.

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**Share this funding opp**

- **From**
  - Stephanie Faulkner
  - Oct 13, 2011

- **To**
  - Enter name or email here...

- **Your groups for sharing:**
  - Stem Cell Researchers

- **Message (optional)**

  500 characters (500 left)

- **Shared opps are sent immediately**

  [Cancel] [Share]
Click the **Share** button at the bottom of the box and a confirmation screen will appear to let you know your Opps have been shared (and any groups created have been saved).

**Send feedback to the Editorial team:** If you notice an inconsistency with the opp you’re viewing, or if you’d like to share some feedback with our funding Editors, click the **Send feedback to the Editorial team** option and your email client will open up a new email that you can compose and send.

**Add a Tag:** This option appears only if you are currently tracking that particular record on your Tracked or Active list. Tags help your organized the Opps you’re tracking on your homepage, whether you keep them in the **Active** or **Tracked** list. Click on **Add a tag** to associate one or more tags with the opp you’re viewing. **Note:** Tags have a 20 character limit. Spaces are not allowed in tags -- multiple words must be connected with an underscore“_”, period“.”, dash“-”, or alpha numeric characters“A-Z, a-z, 0-9”.

**Show me more opps like this:** If you would like to view more funding opps that are closely related to the content in the current opp, select **Show me more opps like this**. Based on a COS algorithm, we display for you additional funding opps that have some of the same characteristics as the opp you’re currently viewing.

**Making Opportunities Active**

**Active opps** are opportunities that you are tracking on your homepage, and have deemed important or critical. Active opps are most likely opps for which you plan to apply or for which you’ve already applied and would like to keep a close eye on. When you mark an opp as Active, it will be listed in the Active section on your homepage, which is shown to you immediately upon logging into your homepage.

There are two ways to mark an opp active:

1) **From the results page:** After running a funding search, you will see a **Tools** box in the upper right corner of the main results page. On the results list you can mark one or more opps (by checking off the check box to the left of the opp title) and select **On active list** from the **Put opp on** dropdown menu. This will track those opps in the **Active** section of your homepage. A light box will appear and will ask you to tag your records for better organization.

2) **From within the record:** When you click on any of the opp titles on the results page, you’ll be taken to the record itself where you’ll see a **Tools** box in the upper right corner of the page. There you’ll see a dropdown menu that allows you to choose a variety of options. Choose “on active list” to move that particular opp to the **Active** section of your homepage. **(Note:** if the opp is already being tracked in your **Active** area, the dropdown menu will instead be
Tracking Opportunities

**Tracked opps** are opportunities that you are tracking on your homepage, and are less critical than the **Active** opps. **Tracked** opps are opps that you would like to follow, and for which you can receive a **Funding Alert**. There are two ways to track an opp:

1) From the results page: After running a funding search, you will see a **Tools** box in the upper right corner of the main results page. On the results list you can mark one or more opps (by checking off the check box to the left of the opp title) and select **On tracked list** from the **Put opp on** dropdown menu. This will track those opps in the **Tracked** section of your homepage. A light box will appear and will ask you to tag your records for better organization.

3) From within the record: When you click on any of the opp titles on the results page, you’ll be taken to the record itself where you’ll see a **Tools** box in the upper right corner of the page. There you’ll see a dropdown menu that allows you to choose a variety of options. Choose **On tracked list** to move that particular opp to the **Tracked** section of your homepage. (Note: if the opp is already being tracked, the dropdown menu will instead be a bolded note, **On tracked list**. Once you have placed an opp in the **Tracked** list, you can tag them by choosing **Add a Tag** from the **Tools** menu.

Sharing Opportunities

COS Pivot allows you to share individual funding opportunities with other users and non-users. Non-users have access to the funding opp for 14 days. COS Pivot users have access to the funding opp indefinitely.

You can do so from two places:

1) **From the results page**: After running a funding search, you will see a **Tools** box in the upper right corner of the main results page. On the results list you can mark one or more opps (by checking off the check box to the left of the opp title), and then select **Share with faculty**. A light box will appear where you’re asked for a few pieces of information. First, enter in the name of the first person with whom you’d like to share the funding opp. As you type, COS Pivot will attempt to find a match at your institution. If the match appears, just click on the name. If no match appears, simply type in the email address. To add another name or email, press the Tab key and type in the new name/email address. You can continue to type in names or email addresses. You can also select a pre-defined group as your recipients. Click on the group name in the **Your groups for sharing** area. Next, you can enter a message in the text box below for your recipients. You can also choose to receive a copy of the shared opps by clicking the **Send myself a**
copy button. Click the box labeled If sharing this opp with multiple people, let each recipient see who else received this from you to display for each recipient who the other recipients are. Click the Share button at the bottom of the box and a confirmation screen will appear to let you know your opps have been shared.

2) From within the record: When you click on any of the opp titles on the results page, you’ll be taken to the record itself where you’ll see a Tools box in the upper right corner of the page. Click the Share with faculty option and you’ll see a light box where you can add the names/emails of the people with whom you’d like to share this opp. As you type, Pivot will attempt to find a match at your institution. If the match appears, just click on the name. If no match appears, simply type in the email address. To add another name or email, press the Tab key and type in the new name/email address. You can also select a pre-defined group as your recipients. Click on the group name in the Your groups for sharing area. Use the text box below the emails to type in a personalized message that your recipients will see. You can also choose to receive a copy of these shared Opps by clicking the Send myself a copy button. Click the box labeled If sharing this opp with multiple people, let each recipient see who else received this from you to display for each recipient who the other recipients are. Click the Share button at the bottom of the box and a confirmation screen will appear to let you know your Opps have been shared.