

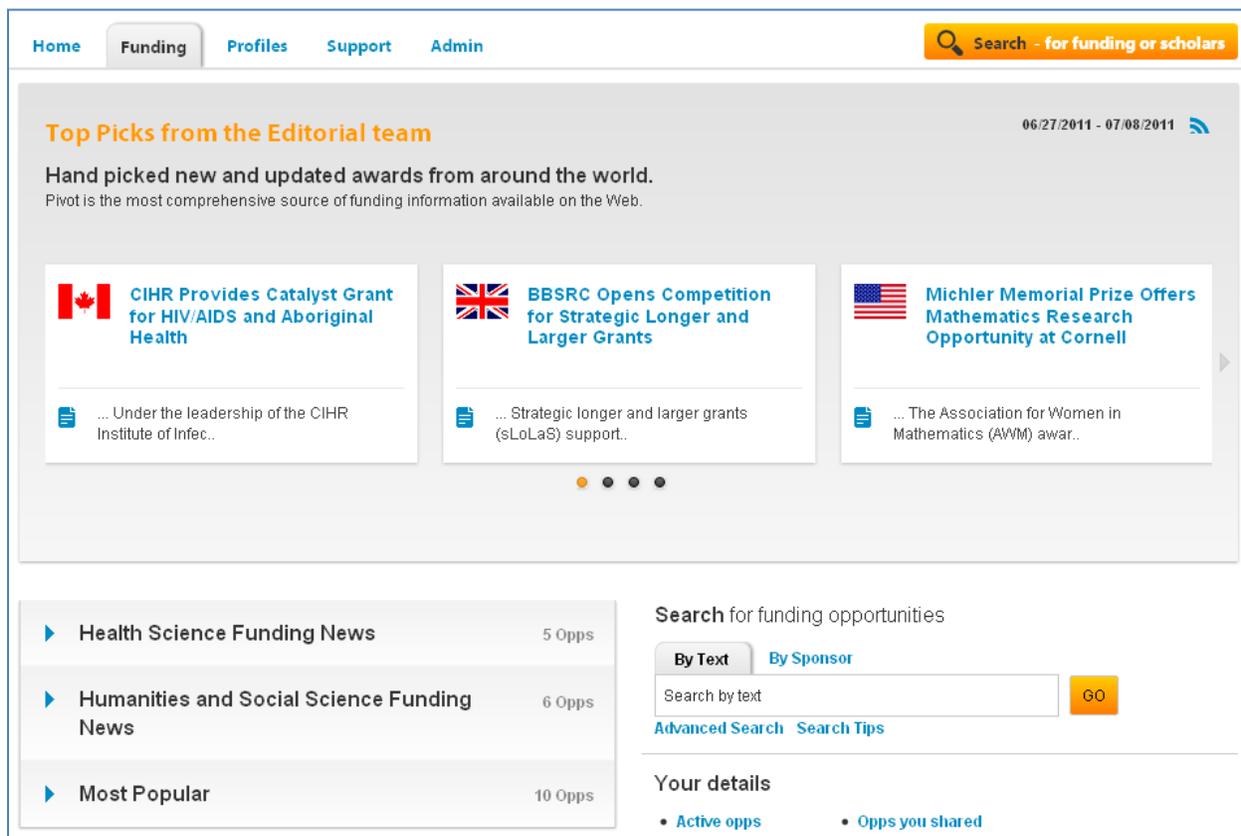
COS Pivot Funding Homepage and Searching

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

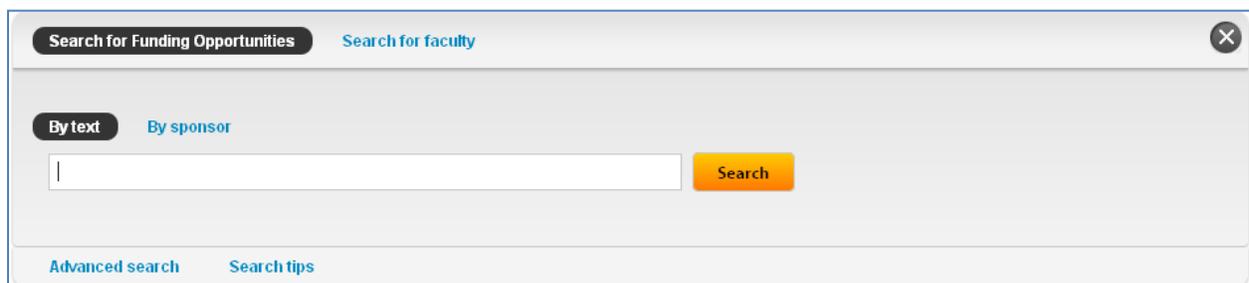


The screenshot shows the COS Pivot Funding Homepage. At the top, there is a navigation bar with links for Home, Funding, Profiles, Support, and Admin. A search bar is located in the top right corner, labeled "Search - for funding or scholars". Below the navigation bar, the main content area features a section titled "Top Picks from the Editorial team" with a date range of "06/27/2011 - 07/08/2011". This section includes three featured funding opportunities, each with a country flag icon and a brief description: "CIHR Provides Catalyst Grant for HIV/AIDS and Aboriginal Health", "BBSRC Opens Competition for Strategic Longer and Larger Grants", and "Michler Memorial Prize Offers Mathematics Research Opportunity at Cornell". Below these featured items, there are three categories of funding news: "Health Science Funding News" (5 Opps), "Humanities and Social Science Funding News" (6 Opps), and "Most Popular" (10 Opps). To the right of these categories is a search section titled "Search for funding opportunities" with tabs for "By Text" and "By Sponsor", a search input field, and a "GO" button. Below the search section, there are links for "Advanced Search" and "Search Tips". At the bottom right, there is a "Your details" section with links for "Active opps" and "Opps you shared".

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**



The screenshot shows a web interface for searching funding opportunities. At the top, there are two tabs: "Search for Funding Opportunities" (selected) and "Search for faculty". Below the tabs, there are two search options: "By text" (selected) and "By sponsor". A search input field is present with a vertical cursor, and a yellow "Search" button is to its right. At the bottom of the interface, there are links for "Advanced search" and "Search tips".

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.

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.

Funding search results 20 Opps

Faceted Searching Refine your query Show your query New Search Save your query **Tools**

Tools

- Put opp on
- Export details
- Share with faculty

Search Results List

1-20 of 20 results

Set by your institution

Location filter
 United Kingdom OR Unrestricted

Citizenship/Residency filter
 United Kingdom OR Unrestricted

Refine results

Submission type
 Limited Submission: 4

Top sponsor types
 Other Nonprofit: 5
 National Government, Non-U.S.: 4
 Federal, U.S.: 3
 Private Foundation: 2
 Multinational Organization: 2

	Sort by	Relevance	Opp title	Sponsor	Deadline	Amount
<input type="checkbox"/>			1. UK-US Stem Cell Collaboration Development Award Foreign and Commonwealth Office (FCO) - United Kingdom		unspecified	see note
<input type="checkbox"/>			2. Stem Cell Investigator Awards New York Stem Cell Foundation (NYSCF)		Jul 08, 2012	\$1,500,000
<input type="checkbox"/>			3. Translational Stem Cell Research Programme - Response Mode Funding Medical Research Council (MRC) - United Kingdom		Dec 14, 2011	see note
<input type="checkbox"/>			4. Multiyear Awards Amyotrophic Lateral Sclerosis Association (ALS Association)		Jan 05, 2012	\$80,000
<input type="checkbox"/>			5. Scientific Research Grants Program National Blood Foundation (NBF)		Dec 30, 2011	\$75,000
<input type="checkbox"/>			6. Directed Stem Cell Differentiation for Cell-Based Therapies for Heart, Lung, and Blood Diseases (R21)			

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 in 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.