What is COS Pivot?

For years, COS has been recognized around the world for its coverage and inclusion of funding from a wide variety of sources as well as its access to the world’s research community.

Now, Pivot provides Research Administrators, Research Development Professionals, and individual faculty members the edge—by bringing together the right research opportunities, funding, and people—quickly and easily. It provides global and local connections that strengthen research by exploring new avenues for funding and collaboration—for faculty, staff researchers, and graduate students.

Built from the ground up, Pivot combines the best of what our customers love in our world-renown COS Funding Opportunities and COS Scholar Universe with intelligent mapping features that expedite funding discovery, dissemination, and collaboration. With Pivot, connecting the right opportunities with the right people is routine.

Pivot is a power tool that

- Provides access to the most comprehensive global source of funding opportunities—totaling billions of dollars and growing
- Identifies researcher expertise from within or outside of your organization from millions of profiles from leading research organizations worldwide
- Fosters collaboration by cultivating essential partnerships and alliances
- Enhances communication, monitoring, and tracking amongst individual faculty, teams, or researchers and the Research Development office
- Allows the focus to be on winning the necessary awards and grants
- Builds strong network connections for future opportunities
Browser Compatibility

Pivot is compatible with the following browsers on most recent platforms:

Windows

- Microsoft Internet Explorer 8.0 and 9.0*
- Firefox 17 through 20
- Chrome 26

Mac

- Chrome 26
- Safari 6.0.4

*Suggest a Scholar and Profile Updating do not currently work successfully with IE 9.0. We recommend using Firefox or Chrome when using these features.
Your COS Pivot Account

If you had an account for COS Funding Opportunities, you will use that same username and password for Pivot. If you do not have a current COS account, you will need to create an account.

Logging in to COS Pivot

Pivot login is presented in the top right-hand corner of the pages in Pivot. You must be logged in to

- View your homepage displaying your Active and Tracked opps
- View funding opps shared with you or the status of those you have shared with others
- Save a search
- Add an opp to Active or Tracked
- Share a funding opp
- Claim and/or update a profile

Enter your username and password in the Pivot Login box to start your Pivot session and complete the actions listed above.

Creating your Pivot account

If you do not have a current account

- Click on the Sign Up link
- Complete the required fields including the name of the subscribing institution to which you belong
- Click the Create my account button

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• You will receive a verification email at the address entered in the account creation process which will include a link to Pivot.

• Your email address and the password you entered during account creation will be your Pivot username and password.

Login help

Login help link takes you to the Login Help Options page where you can link to the following links:

• Create your Pivot account – see information above

• Forgot password – this link takes you to the form to complete to be sent your password

• Contact Help Desk – if you need additional assistance logging in to Pivot, let us know how we can assist you and someone from the Help Desk will be in contact with you within one business day.

My account

Once you are logged in to Pivot, we provide you with a link to manage your account. Click on the “account” link next to your name for the following options:

Account Information

• Change account information – select this option to change your user ID (username) or password.

• Select your Pivot affiliation – this option is only display if your account is affiliated with more than one institution that subscribes to Pivot.

• Contact Help Desk – if you need additional assistance with your account, select this option to send information to the Help Desk.

• Institutional Settings for Funding Opps Search – allows you to disable any pre-set activity location and citizenship/residency requirements used when searching for funding, that have been established by your administrator.

Groups

The groups area allows you to create pre-defined lists (groups) of email addresses which you can use when sharing funding opps or saved searches in Pivot. You can edit, rename or delete groups in this area.

To create a new group from the Account area:

• Click Account.
• Click Groups
• Click New Group
• Enter a name for your group

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- Enter the people for your group – if you are adding colleagues from your Institution, simply type the name and if they have a Pivot profile, their email address will display.
- To enter people who are not in your institution, type the email address and click the “tab” key after entering the email address.
- When you have finished entering names and/or email addresses, click Submit.
Creating and Updating Your Profile

One of the benefits of COS Pivot is that we have over 3 million faculty profiles created and maintained by our Editorial Team. This takes the updating burden off you! We review profiles on average every 12 to 18 months. If you have pertinent information you need added or changed in your profile, you can make certain updates or additions on your own. You can even attach certain types of files that COS Pivot will index and make searchable until the information is confirmed and added to your profile.

If you have a profile linked to your account, once you log in to Pivot your name will be linked directly to your profile and you will see the prompt to update your profile. If your name is not linked, you will need to either claim an existing profile or create a profile.

Claiming an Existing Profile

Claiming an existing COS Pivot profile is not required in order to use COS Pivot, however, there are certain benefits you receive by doing so:

**COS Pivot Advisor**: The Advisor makes funding opp recommendations for you based on your profile. These recommendations are automatically available on your COS Pivot Homepage when you have claimed your profile. If you do not claim or create a profile, you will not see the Advisor recommendations on your homepage.

**Updating your own profile**. If you do not **Claim your profile**, you cannot update it. Why make sure your profile is updated? Your profile is viewed by thousands of COS Pivot users who may be looking for potential collaborators for a research project. You may be overlooked because your profile is missing critical information.

**To claim an existing profile:**

1) Log in to COS Pivot.
2) In the upper right-hand corner, your name is displayed. If you see a **Claim profile** link, you know there is not a profile linked to your COS Pivot account. Click the **Claim profile** link.
3) A list of potential profile matches (from within your institution) may be displayed. If no matches occur, you can choose to look for potential matches outside your institution by clicking on the appropriate checkbox above the results list.
4) If you locate your profile from the results list, click the **This is me** button to the right of the profile name. If no results display, click the **Suggest a scholar** link located to the left of the results list.
5) After clicking on the This is me button, a message will be displayed informing you that you that a new window will be opening to complete the profile claim process.

6) You will then be asked to confirm whether or not you still have access to the email address listed on your COS Pivot profile.

7) If you confirm that you still have access to the email on your profile, you will receive verification email to that address that will link your profile to your account and will grant you access to update your profile.

8) If you do not have access to one of the emails displayed, select I no longer have access to any of the above email addresses and hit the submit button and you will be taken to a form to complete to request access to edit your profile. The information submitted is reviewed by our editorial team and once validated, you will receive an email at the new email address submitted which links your profile to your account and grants you access to update your profile.

Updating your COS Pivot profile:

COS Pivot provides the capability for you to update certain fields or areas of your profile. Updating your profile can increase the the quality of the funding matches recommended for you from the COS Pivot Advisor.

You can currently submit updates for the following fields:

- Name
- Email address(es)
- Webpages with publications
- Degrees
- Affiliations (both past and present)
- Other (this is an open text box that allows you to provide additional feedback that you cannot submit through the above fields, such as research interests)
- Upload a CV or publications list in .pdf, .doc., or .txt format. Documents submitted to your profile are indexed and searchable (as are webpages).

Change submissions are editorially reviewed, there is an approximate two week turnaround time for the changes/updates you submitted to be viewable on your profile.

Scholar Feedback:

Thank you for your interest in editing your profile. The information that is contained in your profile comes from public sources of information, such as your university's website, databases of publications, and other vetted sources. We welcome your input to augment and update the information displayed.

Use the following feedback forms to tell us about changes to your name, email address, webpages, degrees, affiliations, and other information. If you do not have an online CV or publications page, you can upload either of these as a document or pdf. All changes are reviewed before being added to your profile.

For more information on your profile, please contact the Profile Help Desk. Visit RefWorks-COS.com for information on our products and services.

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To change or update your COS Pivot profile:

1) Log in to your COS Pivot account.
2) Click on your name (which is hyperlinked to your COS Pivot profile)
3) Click the **Update your profile** link near the right of the screen.
4) Clicking the **Continue** button will take you to the **Scholar Feedback**.
5) Click any of the headers across the top and you can edit the relevant information for those specific areas of your profile.
6) Follow the instructions for the information you are updating. Publication information can only be uploaded in a document saved as a .pdf, .doc., .docx or .txt file.

Your submissions will be reviewed by the Editorial Team and will be viewable in COS Pivot in approximately two weeks.

To create a COS Pivot profile for yourself (or for someone else):

1) Click the **Suggest a scholar** link on any profile search results page.
2) Enter the name of the of the person you would like a profile created for.
3) Once you submit the name, you will be shown a list of profiles that have already been created that may represent the person you wish to have added.
4) If you find a profile from the list that represents the person you wish to have added, no further steps are required, since a profile already exists.
5) If no profiles are returned or none of the profiles from the list represent the person you wish to have added, click the **No match** button.
6) You will be brought to a new page where you will be prompted to enter some information about the person you wish to have added. Fill out as much information as you can, paying attention to the required fields.
7) Click the **Submit** button when finished.
8) Once a profile for the person has been created, you will receive a confirmation from the COS Pivot Editorial Team.
Quick Search

The Pivot Quick Search is an easy way to conduct 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.
Funding 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:

First log onto Pivot and select the Funding Tab. From there, click “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 of the 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 of the Fields**

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, or 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. You can display additional search areas: Amount, Deadlines, Limited Submission/ Internal...
Coordination, Activity Location, Citizenship, Funding Type, Keywords, Requirements, or Sponsor Type.

4. At the bottom of the page, you can exclude fields from your search. You can exclude any combination of terms as well as exclude information in the areas mentioned above.
Funding Field Descriptions

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 Pivot funding 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
  - 7 days from today
  - 30 days
  - 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 Pivot 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, Pivot keywords.
You can view the Pivot keywords through the 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 Pivot 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 Pivot Keyword is used instead of the entry term that appears. E.g., Consumer Services **USED FOR** Customer Service

  **USED FOR+**
  Indicates that this Pivot 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
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.
Funding 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 or 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.), click the check box to the left of each term.
- 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.
Saved Searches

In addition to tracking individual funding opps, 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 Pivot account).

The Saved Searches link to the left of the page indicates the number of searches you have saved. Clicking on the link will take you to your full list of saved searches.

Your saved search summary on your homepage displays:

- A list of your saved searches with each search title listed as a hyperlink
- The number of new funding opps that match your search query
- The number of your new funding opps that are limited submissions
- An options link that will allow you to take several actions with your saved searches

Saved Searches are automatically run weekly and the number of opps is 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 results, so your new results will reflect 0 opps.

Saved Search Details
Your saved searches are displayed in alphabetical order. Your weekly funding alert summary is displayed. This summary includes:

- **New Results** – How many new or updated opportunities matched your search criteria in the past week
- **Limited submission opps** – total number of funding opps in your weekly alert that are identified as limited submission

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:

- View all results or new results for a saved search
- Share your search
- Edit your search
- Add tags to your search
- View archived search results
- Turn your weekly Alert email on or off (alerts are always run even if you do not select the email option)
- Delete your search

**Viewing Saved Search Results**

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 Saved Searches area of your homepage.
2) Click the hyperlinked name of your saved search
3) By default you will see the results from the most recent funding alert. To see all of the results for your saved search, click on the All radio button.
4) For either set of results use the facets on the left side of the page to narrow down your results or click the Sort option to resort the list.
5) Click the hyperlinked record title to see the full record.
You can then track, tag or make active any of the search results. You can also share individual records and export your results.

**Sharing a saved search**

You can share your search query with other 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 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 *Saved Searches* area of your homepage.
2) Click *Options* for your saved search and select *Share*.
3) Enter the email addresses of those whom you want to share your search with or choose to send it to one of your saved groups.
4) Enter a message to accompany the saved search URL.
5) Click *Send*.

**Editing a Saved Search**

You may find that your saved search is not getting the results you would like – maybe too many matches or too 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 *Saved Searches* area of your homepage.
2) Click *Options* for your saved search and select *Edit*.
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 Search*. Your original saved search name will be displayed. You can modify the name and alert options if desired.
6) Click *Save* when finished.
Tagging Saved Searches

You can add tags to any of your saved searches to organize them. You will be able to filter your searches using your tags from your saved searches page.

To add tags to a saved search:

1) Locate your saved search query in the Saved Searches area of your homepage.
2) Click Options for your saved search and select Add Tags.
3) To create a new tag, click + create new. Enter the name of the tag and click Create. Your tag will be added to the search.
4) To use an existing tag, enter the tag and Pivot will search for it; or mark it from the list of displayed tags. Note: Tags used for Saved Searches are completely separate from tags used for active and tracked opps.
5) Click Apply to add the tag.

To remove tags for a saved search:

1) Locate your saved search query in the Saved Searches area of your homepage.
2) Click Options for your saved search and select Edit Tags.
3) The list of tags will be displayed. Deselect the boxes for the tags you wish to remove.

Viewing Saved Search Archives

Pivot maintains archives of your funding alert results. These archives show you the previous three weeks' results.

To view the archives:

1) Locate your saved search query in the Saved Searches area of your homepage.
2) Click Options for your saved search and select View archived results.
3) You will be taken to the previous week's alert archives. The funding opps that matched your saved search are displayed by relevance, along with the amount and upcoming deadline. Click on the opp title to see the full opportunity. You can also click on the abstract icon to view the abstract and eligibility information.
4) To view older results click on the date under View results for the week of on the left side of the page.
Email Notifications

Saved searches will be run against the funding database weekly to look for new or updated funding opportunities that match your saved search criteria. When you save your search you can choose whether or not to receive a weekly e-mail with new or updated results about your saved search. You can manage your email notifications from your home page. If you see an envelope in the email notification column you will receive a funding alert e-mail on Sunday.

To turn e-mail on/off:

1) Locate your saved search query in the **Saved Searches** area of your homepage.
2) Click **Options** for your saved search and select **Alert email on** (or Alert email off).
3) Depending on your selection the e-mail icon will appear or disappear from your Email alert column.

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 **Yes** button.

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

**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 can 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”.

Your current number of **Active Opps** is noted in the menu column to the left, as well as at the top of your results list. Note that the count at the top of the results list does not include your Expired Opps unless those have been selected. Additional information is listed about each opp:

- Title of the opportunity, linking to the full record
- Any tags you’ve assigned to the opp
- Sponsor deadline
- What’s due next (application, proposal, letter of intent, etc.)
- Options Menu
- Icons to indicate when a record
o Has a limited submission – a “Limited” icon will appear next to the opp name
o Needs some sort of University-level coordination necessary—a gray “ICR” icon will appear next to the opp name
o Was recently updated—an orange “updated” icon will appear next to the opp name
o Has the alert email option enabled – an envelope icon will appear between the Deadline column and the Options menu.

You can refine the view of your Active opps list by selecting or deselecting the filters and/or the tags on the lefts side of your Homepage. Marking a specific Type(s) and/or Tag(s) will display only those Active opps.

You can also modify the view of your Active opps list by sorting the opps—you can choose to sort them alphabetically by Title or by deadline.

You may take action on a group of opps by selecting specific opps and clicking the Share, Export or Untrack buttons.

Options Menu

You can perform several tasks related to individual Active Opps. Click on the Options dropdown menu to the right of any of the opps to:

1. Share the opp
2. Untrack the opp (remove it from your Active list)
3. Move the opp to your Tracked list
4. Add tags or edit the tag(s) associated with the opp
5. Turn the Alert email on or off
6. Turn the Deadline reminder on or off
7. View the people with whom you’ve shared that opp
8. View who else at your institution is tracking that opp

Sharing the opp

To share an opp with someone, click the Options dropdown menu and select Share from the list. A light box will appear where you can type in a recipient, multiple recipients, or select a prepopulated Group. Type in an optional message, and when you’re ready to share the opp, click send. Click the box labeled, let each recipient see who else received this if you want to display for each recipient who the other recipients are.

Untracking the opp

If you’d like to remove an opp from your list of Active opps entirely, select the “Untrack” choice from the Options menu. Click Yes to confirm.

Moving the opp to Tracked

If you’d like to move an opp from your list of Active opps and place it on your Tracked list, select the “Move to Tracked” choice from the Options menu. Click Yes to confirm.

Adding or Editing Tags

You can manage your tags from the Options menu by selecting either “Add a Tag” or “Edit Tags.” If an opp does not have a tag assigned to it, you will see a menu item called “Add Tags.” Click that to select an appropriate tag or tags for that opp. If the opp does have at least one tag associated with it, you can modify it or add additional tags by clicking “Edit Tags.” The “Edit Tags” list shows you all the tags that are currently in use for your Active and Tracked lists; use the checkboxes to remove and/or add tags to that opp. You must click the “Apply” button for the changes to take place. Note: Tags for individual opps are separate from tags for Saved Searches.

Alert Email

If you are currently set up to receive an Alert email about an opp you will see an envelope icon in that opp’s row. If you would like to turn the Alert feature off, click on your Options menu and select the menu item which reads “Alert email off.” If there is no envelope icon in the row, the Alert feature has been disabled. To turn it back on, click your Options menu and select the menu item which reads “Alert email on.”

Deadline Reminder

You can opt to receive an email alert 2 weeks before the deadline on opps in your Active list. If you would like to turn the Deadline reminder on, click “Turn deadline reminder on”. You will see a stopwatch icon confirming that you will receive an alert email 2 weeks prior to each deadline. The email will show all deadlines on the funding opportunity, with the deadline that is 2 weeks away highlighted along with info
on what is due. You may disable the deadline reminder by clicking on your Options menu and selecting “Turn deadline reminder off.”

Who you shared with

When you view the list of people you’ve shared an opp with, you’ll see their name (which will be hyperlinked to their Profile, if they have one) along with any action they’ve taken on the opp you sent them.

Who else is interested

Mouse over this choice to view how many people at your institution have a particular opp on their Active or Tracked lists. If you are an administrator, you can click on either option to see the actual names of those people.

Sharing

In addition to being able to share an opp through the “Options” menu, you can also select an opp or a group of opps by checking the box to the left of the opp name. When you select at least one of those checkboxes, the Active Opps header and Sort option will be replaced by a Share button. Once you’ve chosen the opp or opps you want to share, click the Share button and you can fill out the light box as described above. Click the box labeled, let each recipient see who else received this if you want to display for each recipient who the other recipients are.

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

**Tracked** Opportunities are those that 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’ll see on your **Homepage** near the bottom left all the tags you’re currently using to categorize your **Active** and **Tracked** Opps. You can condense or expand your view based on a selected tag(s). You can 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.

When you first log onto your Pivot **Homepage**, you will land on your Tracked opps area. You’ll see the total number of opps that are being tracked (including expired opps) on the left side of the page. The number of **Tracked** opps displayed is noted in orange near the top of the list. You can modify your view according to **Type**, which is found on the left side of the page. Check or uncheck the boxes to see:

- Those tracked opps where the sponsor has limited submissions
- Those tracked opps that need internal coordination
- Opps that don’t fall into the limited submission or internal coordination categories—“Other”
- Tracked opps that have expired (the deadline has passed and these opps are no longer available)

**Tracked Opps Details**

You can track as many opps as you want, there is no limit. Your view of your **Tracked** opps will show several things:

- Title of the opportunity, linking to the full record
- Any tags you’ve assigned to the opp
- Sponsor deadline
- What’s due next (application, proposal, letter of intent, etc.)
- Options Menu
- Icons to indicate when a record
  - Has a limited submission – a “Limited” icon will appear next to the opp name
  - Needs some sort of University-level coordination necessary—a gray “ICR” icon will appear next to the opp name
  - Was recently updated—an orange “updated” icon will appear next to the opp name
• Has the alert email option enabled – an envelope icon will appear between the Deadline column and the Options menu.

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. Once you click on the “shared” icon, it will no longer display.

You can further refine your Tracked opps list by the tags you have assigned. On the left side of the page, your tags will be listed near the bottom. Checking a specific tag (or tags) will display only those tracked opps with the selected tags.

You may take action on a group of Tracked opps by selecting specific opps and clicking the Share, Export or Untrack buttons.

You can also take actions on individual opps on your tracked list by clicking on the Options menu:
1. Share
2. Untrack
3. Move to Active
4. Add or Edit Tags
5. Alert email on/off
6. Deadline reminder on/off
7. Who you shared with
8. Who else is interested
**Sharing the opp**

To share an opp with someone, click the Options dropdown menu and select **Share** from the list. A light box will appear where you can type in a recipient, multiple recipients, or select a prepopulated **Group**. Type in an optional message, and when you’re ready to share the opp, click **Send**. Click the box labeled, **let each recipient see who else received this** if you want to display for each recipient who the other recipients are.

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

**Untracking the opp**

If you’d like to remove an opp from your list of **Tracked** opps entirely, select the “Untrack” choice from the Options menu. Click Yes to confirm.

**Moving the opp to Active**

If you’d like to move an opp from your list of **Tracked** opps and place it in your **Active** list, select the “Move to Active” choice from the Options menu. Click Yes to confirm.

**Adding or Editing Tags**

You can manage your tags from the Options menu by selecting either “Add a Tag” or “Edit Tags.” If an opp does not have a tag assigned to it, you will see a menu item called “Add Tags.” Click that to select an appropriate tag or tags for that opp. If the opp does have at least one tag associated with it, you can modify them by clicking “Edit Tags.” The “Edit Tags” list shows you all the tags that are currently in use for your Active and Tracked lists; use the checkboxes to remove and/or add tags to that opp. You must click the “Apply” button for the changes to take place. **Note:** Tags for individual opps are separate from tags for Saved Searches.

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If you are currently set up to receive an Alert email about an opp, you will see an envelope icon in that opp’s row. If you would like to turn the Alert feature off, click on your Options menu and select the menu item which reads “Alert email off.” If there is no envelope icon in the row, the Alert feature has been disabled. To turn it back on, click your Options menu and select the menu item which reads “Alert email on.”

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funding opportunity, with the deadline that is 2 weeks away highlighted along with info on what is due. You may disable the deadline reminder by clicking on your Options menu and selecting “Turn deadline reminder off.”

Who you shared with
When you view the list of people you’ve shared an opp with, you’ll see their name (which will be hyperlinked to their Profile, if they have one) along with any action they’ve taken on the opp you sent them.

Who else is interested
Mouse over this choice to view how many people at your institution have a particular opp on their Active or Tracked lists. Administrators can click on either option to see the actual names of those people.

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. You can delete items on the Expired list by clicking on the Delete link for a selected funding opp.

Sharing
In addition to being able to share an opp through the “Options” menu, you can also select an opp or a group of opps by checking the box to the left of the opp name. When you select at least one of those checkboxes, the Tracked Opps header and Sort option will be replaced by a Share button. Once you’ve chosen the opp or opps you want to share, click the Share button and you can fill out the light box as described above. Click the box labeled, let each recipient see who else received this if you want to display for each recipient who the other recipients are.

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