

Saved Searches

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

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

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

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

Your saved search summary on your homepage displays:

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

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

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

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

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

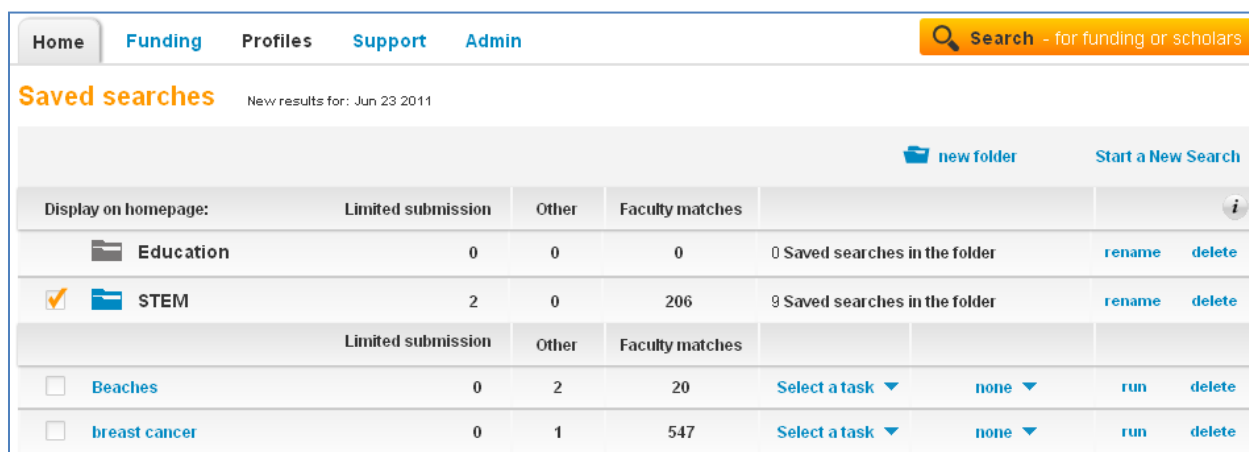
- 1) Click on the **Searches** button.
- 2) Click **See your full list of saved searches**.
- 3) From the **Saved Searches** page, click the check box next to the saved search or folder of searches you wish to have displayed. You can have up to 3 selections on your homepage (a combination of saved searches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

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

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



Saved Search Details

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



Display on homepage:	Limited submission	Other	Faculty matches		
<input type="checkbox"/> Education	0	0	0	0 Saved searches in the folder	rename delete
<input checked="" type="checkbox"/> STEM	2	0	206	9 Saved searches in the folder	rename delete
Display on homepage:	Limited submission	Other	Faculty matches		
<input type="checkbox"/> Beaches	0	2	20	Select a task ▼ none ▼	run delete
<input type="checkbox"/> breast cancer	0	1	547	Select a task ▼ none ▼	run delete

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

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

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

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

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

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

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

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

To Create a Folder for Saved Searches:

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

To View Saved Searches Stored in a Folder:

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

To Move a Saved Search to a Folder:

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

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

To Rename a Saved Search Folder:

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

To Delete a Saved Search Folder:

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

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

Sharing a saved search

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

To share a saved search:

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

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

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

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

Editing a Saved Search

You may find that your saved search is not getting you the results you would like – maybe too many matches or 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 **Searches** area of your homepage.
- 2) Click **Select A Task** for your saved search and select **Edit this search**.
- 3) You are brought to the Advanced Search page where your existing search strategy is displayed in the appropriate search fields.
- 4) Make your modifications to your search query and click **Search** to run the new query.
- 5) From your new search results, click **Save your query**. Your original saved search name will be displayed. You can modify the name and alert options if desired.
- 6) Click **Save** when finished.

Viewing Saved Search Archives

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

To view the archives:

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

Viewing Saved Search Results

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

To run a saved search:

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

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

To delete a saved search:

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

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