

Tracked Opportunities

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

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

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

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

Tracked Opps Details

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

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

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

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

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

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


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



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

Tracked Opps in a Folder

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

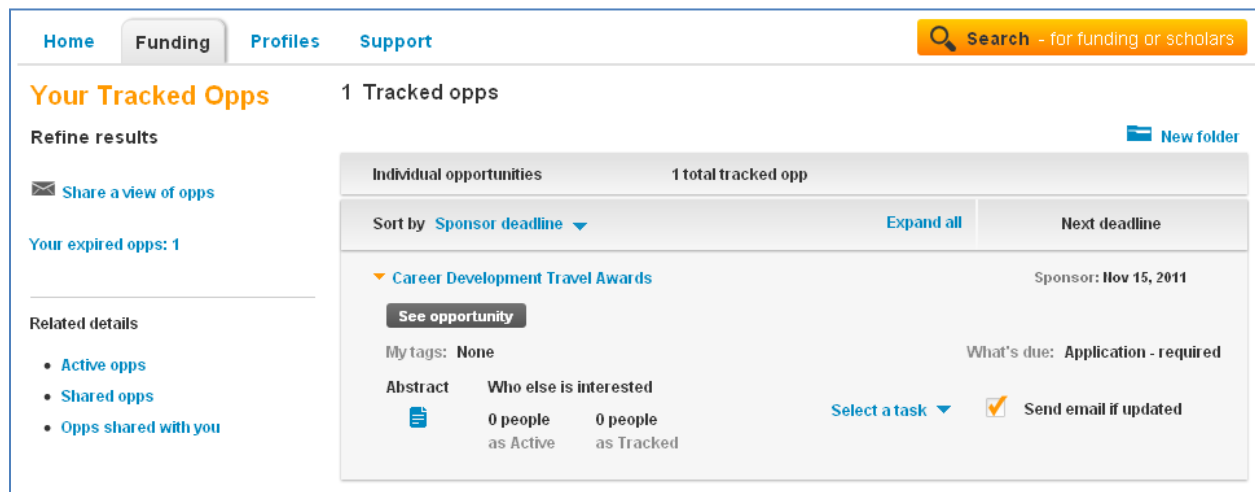
To view the opportunity(ies) in a folder:

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

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

Individually Tracked Opps

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




The screenshot shows the 'Your Tracked Opps' section of the Pivot Research Administrator interface. At the top, there are navigation tabs for Home, Funding, Profiles, and Support, along with a search bar. The main content area displays '1 Tracked opps'. On the left, there are options to 'Refine results', 'Share a view of opps', and 'Your expired opps: 1'. Below that, there are 'Related details' including 'Active opps', 'Shared opps', and 'Opps shared with you'. The main list shows one opportunity: 'Career Development Travel Awards' with a 'Next deadline' of 'Nov 15, 2011'. Below the title is a 'See opportunity' button. Underneath, there are sections for 'My tags: None', 'What's due: Application - required', and 'Abstract'. The 'Abstract' section shows '0 people as Active' and '0 people as Tracked'. There is also a 'Select a task' dropdown and a checked checkbox for 'Send email if updated'.



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

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

From the tracked opp summary, you can:

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

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

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