Navigating Your Search Results

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

**Search Results List**

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

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

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

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

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

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

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

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

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

  To select one or more records, just click the check box to the left of the opp title. To select all 25 on the page, you can click the check box at the very top of the column of check boxes. When your desired records are selected, click the **Add to active** option in the **Tools** box. A light box will appear asking you to add a **Tag** for the Opp(s) you chose. Tagging is optional, but it will give you a convenient way to identify these records on your **Active** list. You can also choose from any pre-existing tags you’ve used in the past. You can select as many as you’d like. 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. 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.

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.

**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.