



# COS Funding Opportunities Quick Start Guide

## Logging In

There are two ways to access COS Funding Opportunities:

- Use an on-campus computer and go directly to <http://fundingopps.cos.com/>
- Log on to <http://www.cos.com> with your COS username and password. (If you don't already have a COS username/password, you can create one from the COS home page.)

You can log in to COS from off-campus to access your COS account and use Funding Opps. You can also log in to COS from on-campus if you wish to view your COS Workbench and/or manage your Funding Alerts.

## Need More Help?

### Online Tutorial

Tutorials are available online to learn more about COS Funding Opportunities at <http://www.cos.com/usertraining>.

### Webinars

RefWorks-COS now offers complimentary training webinars on COS Funding Opportunities. A complete listing of webinar sessions can be found on [www.refworks-cos.com/training](http://www.refworks-cos.com/training). New dates and times are added monthly.

### Support

#### Online

Use the blue "Help Desk" link near the top right of any of the search pages to fill out a form that will be emailed to our help desk staff. Click the blue "Instructions" link to access detailed instructions and Frequently Asked Questions.

#### E-Mail

Send questions or problems to [support@refworks-cos.com](mailto:support@refworks-cos.com).

#### Phone

Contact Technical Services at +1.775.327.4105.

# Searching COS Funding Opportunities

There are four different ways to conduct a search: Simple Search, Advanced Search, Search Wizard, and Pre-Defined Searches.

## Simple Search



Use the Simple Search feature as a search of all fields. To produce maximum results, all search terms entered are connected by the Boolean connector OR. In addition, searches retrieve embedded terms - a search for “art” retrieves records with “heart,” “part,” etc. The results of a Simple Search are always ranked by relevancy.

1. Enter your search terms into the text box. **A**
2. Click **COS Search**.

## Advanced Search



1. Select to run a search by matching **All** or **Any** of the criteria fields you are about to enter by selecting the appropriate radio button at the top of the screen.
2. Click on the drop-down menu to select which field to search (**All Fields**, **Abstract**, **Title**, or **Sponsor**).
3. Enter your search terms into the boxes. Additional fields are available to enter more search terms. If additional rows are needed, click **Add Row**. **B**
4. Click **Search**.

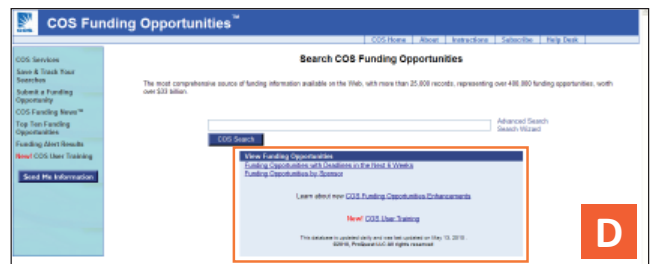
*Helpful Hint: You can determine which opportunities to exclude by entering search terms in the **Exclude Opportunities that match** box.*

## Search Wizard



The Funding Opportunities Search Wizard asks you a series of five questions allowing you to narrow down your funding needs. **C** Based on your answers to these questions, the database will return the appropriate results for you to view. With each question, you can view the current results on the left side of the page.

## Pre-Defined Searches



COS Funding Opportunities offers two pre-defined searches that are always available from the Simple Search page. You can search by funding sponsor or search for opportunities that have deadlines within the next six weeks.

1. On the main home page, locate the Pre-Defined Search box underneath the Simple Search box. **D**
2. Click on **Funding Opportunities with Deadlines in the Next 6 Weeks** or **Funding Opportunities by Sponsor**.

*Note: The Sponsor List option lets you search the entire sponsor list using the blank box provided or to browse the sponsor list alphabetically. Many Sponsor names are listed under the name of their larger controlling entity. Example: 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 Sponsors included in this list may change over time as records are added and removed from the database, so that only those offering active funding opportunities are shown.*

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# Search Results

	R	Grant Title	Sponsor	Deadline	Amount
1.	****	<a href="#">Global Warming: The Facts and The Future</a>	Marian University	unspecified	<a href="#">see record</a>
2.	****	<a href="#">Combating Global Warming</a>	Rockefeller Brothers Fund Sustainable Development	continuous	<a href="#">see record</a>
3.	****	<a href="#">Emerging Climate Leadership Awards</a>	Environmental Leadership Program (ELP)	TBA	<a href="#">see record</a>
4.	****	<a href="#">Environment</a>	Pew Charitable Trusts Advancing Policy Solutions	continuous	<a href="#">see record</a>
5.	****	<a href="#">Lord Goodman - Chevening Scholarships</a>	British Council - Israel	Jan 05, 2011	<a href="#">see record</a>
6.	****	<a href="#">Environmental Activities Grant Program</a>	Toyota Foundation - Japan Grants for Citizen Activities	May 29, 2010	<a href="#">see record</a>
7.	****	<a href="#">Profits for the Planet Program</a>	Stonyfield Farm	continuous	<a href="#">see record</a>
8.	****	<a href="#">Fonds Francaise Pour L'Environnement Mondial (FFEM)</a>	Agence Francaise de Developpement (AFD) French Global Environment Facility (FGEF)	continuous	<a href="#">see record</a>
9.	****	<a href="#">Environment</a>	Rockefeller Family Fund Grantmaking Program	continuous	\$30,000
10.	****	<a href="#">Campus Ecology Fellowship Program</a>	National Wildlife Federation (NWF)	Dec 20, 2010	\$2,000
11.	****	<a href="#">Environmental Leadership Program Regional Fellowship Program -</a>	Environmental Leadership Program (ELP)	Jun 01, 2010	<a href="#">see record</a>

There are 2 different ways to refine your search from the results page: Refine Your Query or Faceted Searching.

## Refine Your Query

1. From the search results page, click on **Refine Your Query** from the top of the page. This option will take you to the Advanced Search page which will show your previous criteria in the search box.
2. Add or remove criteria to narrow down down or broaden your original search. **E**
3. Click **Search**.

## Faceted Searching

Faceted Searching lets you drill down to include more specific criteria without having to go back to your original search.

1. On the search results page, go to the left side of the page where you will find the Faceted Search area. This area will break down your search results into specific categories based upon **Top Sponsor Types**, **Top Funding Types**, **Top Requirements**, and **Top Keywords**. **F**
2. Click on the specific faceted search criteria you would like to use to narrow down your results. A new search results page will open up.

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# Saving, Tagging, and Sharing

COS Funding Opportunities allows you to save search strategies, tag records to save to your Workbench, and/or share searches and records with your colleagues.

## Saving a Search

1. From the search results page, click on **Save Search** at the top of the page. (If you are not logged in, the system will prompt you to log into your COS Workbench at this time.)
2. Enter a name for your saved search in the text box.
3. Choose whether or not to receive a Funding Alert on this search by choosing **Yes** or **No**.
4. Click **Save This Search**.

## Tagging a Record

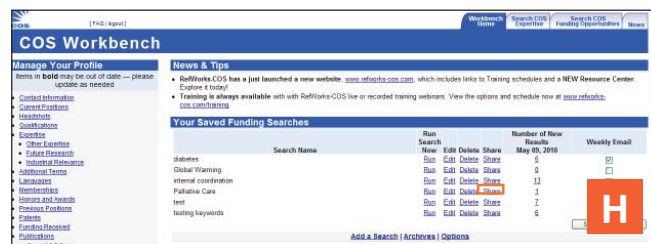


Tagging a record allows you to save the record to your COS Workbench so you can continue to follow it. Tagging is simply a way of categorizing your saved records. Since you are allowed an unlimited number of saved records, we give you a way to group similar records together.

1. From the search results page, select which records to tag.
2. Click **Track Records** from the top of the page.
3. Select the appropriate records to track by selecting **Checked Items** or **All Items on Page**.
4. Enter tag names in the text box. **G**
5. Click **Track**.

*Helpful Hint: You can also tag a record from within the record itself.*

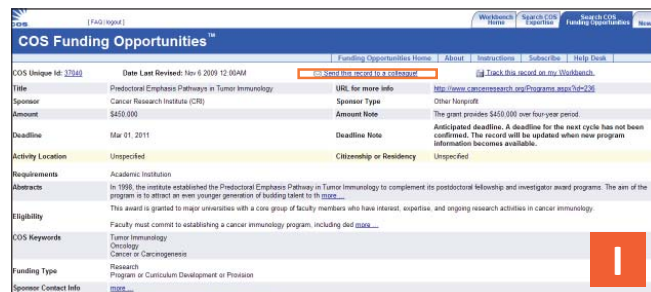
## Sharing a Search



1. Log onto your COS Workbench or go to the **Workbench Home** tab at the top of any COS screen.
2. Go to the section labeled “Your Saved Funding Searches”.
3. Select the search strategy to share, and click on **Share**. **H**
4. Fill out the form with the required information.
5. Click **Send**.

*Note: A unique URL will be generated that you or your colleagues can click to access the results of this search strategy. This URL can then be posted to a website, electronic newsletter, listserv, etc. Your colleagues must belong to a subscribing COS institution, otherwise, he/she will get an error message when trying to view the search results.*

## Sharing a Record



1. Log onto your COS Workbench or go to the “Workbench Home” tab at the top of any COS screen.
2. Go to the section labeled “Your Tracked Funding Records” located below your saved searches.
3. To share an individual record, open the record and click on **Send this Record to a Colleague** at the top of the page. **I** To share all of your records, scroll down to the bottom of your Tracked Funding Records and click on the **Share All Records** button.
4. You can also share subsets of your records list by clicking on the Tag name at the top of your list of saved records.
5. Fill out the form with the required information.
6. Click **Send**.

*Note: When you share a record with a colleague from within the record itself, the shared URL is good for 14 days and can be shared with COS members and non-members.*

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