

# Searching COS Funding Opportunities



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## About COS

COS is a database of funding opportunities in all disciplines for research, programs, creative activities, outreach, study, and other scholarly activities.

## Where to Begin

[http://grantsource.unc.edu/funding\\_databases.php#cos](http://grantsource.unc.edu/funding_databases.php#cos)

- Click *COS Funding Opportunities*.
- 5 Recommended fields to fill in:
  1. *Keywords and/or free text*
  2. *Requirements (eligibility)*
  3. *Citizenship or Residency*
  4. *Activity Location*
  5. *Funding Type*

### 1. Keywords (option a)

Keywords are terms that describe your topic or field. Select all the keywords that apply.

- Click on *Keywords* at the bottom of the *Search Fields* section.
- Click on *browse* below the *Keyword* section.
- Browse for keywords in the pop-up window by clicking through the folders on the top half of the screen or find them using the search box in the bottom half of the keyword window.
- Click on the text of the keyword to add the term to your search.
- Click on the icon next to the word in the search results list to see related terms
- Uncheck the *Explode* box under the list of keywords on the search page. This will ensure that the results will match only the specific terms selected. *Explode* will re-check itself after any new keywords are added, so be aware.

**Tip:** Select **broad keywords** that apply to your research, such as "History," or "Biological Sciences" as well as more specific terms.

## OR

### 1. Free Text (option b)

The free text search boxes allow you to combine terms to create your own query.

- Terms on the same line are combined with OR, those on separate lines are combined with AND.

**Tip:** Choosing "Match Any Field" will combine **all** fields with OR, not just the free text ones.

### 2. Requirements

- Click on *Requirements* at the bottom of the *Search Fields* section.
- Select all the terms that apply to you and your organization.
  - If you are no longer a student, you should select *PhD/MD/Other Professional*.
  - Those working toward a degree should select *Graduate* or *Undergraduate Student*.
  - Faculty and staff should always add *Academic Institution* to their selections.

**Tip:** Selecting *Minority, Women* or *Persons with Disabilities* will result in all opportunities labeled with that descriptor (e.g. – minority business owners and undergraduates, not just minority graduate students).

### 3. Citizenship or Residency

- Select the country or countries of your citizenship.
- Check *Unrestricted* and *Unspecified*.

**Tip:** Faculty and staff who are not U.S. citizens should still select *United States* in addition to their citizenship.

### 4. Activity Location

- Click on *more locations* below the dropdown.
- Search or browse in the pop-up window to find the appropriate state, country or region.
- Check *Unrestricted, Unspecified, Sub-entities* and *Super-entities*.

**Tip:** All Carolina researchers should select *North Carolina* from the browse window. Selecting *United States* with *Sub-entities* checked will yield results for all states (California, Alaska, Ohio, etc.)

### 5. Funding Type

- Click on *Funding Type* at the bottom of the *Search Fields* section.
- Select all the types of funding you are seeking.

### Saving a Search

- For instructions on creating a COS account and saving your searches, see the *COS Workbench and Funding Alerts* handout.

# Introduction to COS Workbench and Funding Alerts



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## About COS Workbench and Funding Alerts

Registering with COS will allow you to create an expertise profile; save your funding searches; receive alerts; and track individual funding opportunities.

## Register for a COS Profile

[http://grantsource.unc.edu/funding\\_alerts.php#cos](http://grantsource.unc.edu/funding_alerts.php#cos)

- Click *Register for an account*.
- Fill out the required fields marked with red stars, plus the *Title* field.
- Use your UNC email address.
- Click on *Create my Account*.
- Click on *COS Profile*.
- Click on the *Workbench Home* tab at the top right of the page.

## Login to Your COS Workbench

[http://grantsource.unc.edu/funding\\_alerts.php#cos](http://grantsource.unc.edu/funding_alerts.php#cos)

- Click *Login to your COS Workbench*.
- Enter your username and password.

## Create a Funding Search

- Start a search by clicking *Add a Search* below the *Your Saved Funding Searches* section.
- Construct a search following the instructions in the *Searching COS Funding Opportunities* handout.

## Save a Funding Search/Receive a Funding Alert

You may save up to 40 different funding searches on your COS Workbench.

- Click *Save Search* at the top of the search results page.
- Name your search.
- Choose whether or not to have new and updated opportunities matching this search emailed to you in a weekly alert.
- Your saved search will appear on your COS Workbench, under *Your Saved Funding Searches*.

## Run a Funding Search

To view the complete results for a saved search:

- In the *Your Saved Funding Searches* section, click *Run* by the appropriate search..

**Tip:** After first setting up your search, screen the results and track and tag the best funding records (see *Tracking Individual Funding Opportunities*).

## Edit a Funding Search

If you want to alter a saved search:

- In the *Your Saved Funding Searches* section, click *Edit* by the search you want to refine.
- Make your changes to the search.
- Click *Search* to run your newly edited search.
- Click *Save Search* at the top of the results page to save your refined search.

## Tracking Individual Funding Opportunities

You may track up to 200 different funding opportunities on your COS Workbench.

- While viewing a funding record, click *Track this record on my Workbench* at the top.
- Choose whether to receive email notification when the tracked record is updated.
- Assign a tag or tags (one word descriptors) to help you organize your tracked records.

## Sharing Opportunities

Sharing searches and tracked records creates a link to dynamic information – clicking it will always return current results or records.

- To share a saved funding search:
  - Click the *Share* link for the funding search you want to share.
  - Complete the form and click *Send*.
- To share tracked funding records:
  - Under *Your Tracked Funding Records*, click on a tag name to share only records with that tag, or click *All* to share all..
  - Click *Share records* located below the tracked records list.
  - Complete the form and click *Send*.

## Turn Off a Funding Alert

- In the *Your Saved Funding Searches* section, uncheck the *Weekly Email* box.
- Click the *Save Email Changes* button.

## Update your COS profile

- In the left column, under *Manage Your Profile*, click on the sections you wish to update.
- Review the existing information. Click *[edit]* in the fields that you wish to change.
- Make the appropriate changes and save by selecting *Update* at the bottom of the screen.
- Please make sure your *Current Positions* and *Contact Information* are correct.