

## COS Pivot Researcher Training Outline for Librarians and/or trainers

### Funding

The funding database contains approximately 26,000 records; it is important to remember that records are removed after the deadline for the opportunity has passed. New records are added daily.

Every record in Pivot is indexed by a COS editor. Each record is indexed with keywords from the Pivot Funding controlled vocabulary, and contains a hyperlink to the funding opportunity from which it was indexed.

#### I. Quick Search vs. Advanced Search

A. **Quick Search** requires following caveats:

1. *food security* will automatically ‘OR’ these two terms (quick search engine functions with an implied ‘OR’)
2. **food OR security** will also retrieve all records containing either the words food or security
3. **“food security”** will yield records with these two words adjacent
4. **“food w/5 security** will yield records with these two words within five words of each other (proximity operator = w/any #)
5. **NOT** operator may be used (*optional to show during training*)
6. **Wild card** (\*) may be used (*optional to show during training*)
7. Many of the best ways to focus search results are not accessible via QS; post-search results display shows refinements in five index fields **BUT** only the top **five** attributes:
  - a. Submission type (**2 attributes**)
  - b. Sponsor type (**9**)
  - c. Funding type (**15**)
  - d. Requirements (**12**)
  - e. Keywords (**11 first level; 3,683 total**)

....therefore a searcher may miss attributes that are not in the top five

#### B. Advanced Search

1. Constructing a search strategy using the boxes and rows does not require as much explanation as Quick Search
2. “i” button fully explains how to use a search attribute
3. **Nine** fields to flexibly focus or customize search results (multiple *selections may be made via control + click*)
  - a. Amount
  - b. Deadline
  - c. Limited submission/internal coordination (*note: since this field only contains two attributes—limited submission AND other internal*)

*coordination, and if there are records with these attributes, they always appear at the top left of search results page)*

- d. Activity location (*may be set in advance by local Pivot administrator*)
  - e. Citizenship or residency (*also may be set in advance by local Pivot administrator*)
  - f. Funding type
  - g. Keywords (*may be searched or browsed*)
  - h. Requirements
  - i. Sponsor type
4. Exclude search terms (*all nine of the fields above are displayed under exclude*)
  5. ***Suggestion for training: create an advanced search template and save it; as an example:***

***Citizenship=United States + unrestricted and unspecified***

***Activity location= United States + unrestricted and unspecified (and perhaps sub entities, and/or super entities)***

***Requirements=academic institution OR Ph.d/M.D./Other professional***

***Amount= more than \$100,000 (100000)***

*...then add a free-text search strategy using the search boxes at the top of the advanced search page*

*OR*

*Add to the search strategy using **keywords***

*AND use any of the other attributes (Deadline, Funding Type, Requirements, and Sponsor Type)*

### **C. Keywords**

1. Controlled vocabulary: 11 first-level categories 3,683 total terms
2. 'Explode' returns terms indexed under terms selected
3. Searching
  - a. **Search** Makes suggestions regardless of where the term being typed appears; will also land cross-referenced terms; Returned terms show the Hierarchical path where term sits
  - b. **Browse** Hierarchical, alphabetical list; up to four levels deep
4. ***Suggestion for training:***
  - a. *Show trainees (faculty, graduate student, etc.) how to find Keywords applicable to their subject expertise (usually 3-8 terms)*
  - b. *Save the search strategy; make sure that the 'e-mail weekly' is turned on*

**II. Monitoring and Manipulating Funding Opportunities** (*training hint: put a couple opps in both tracked and active before training. Also, Opps may be shared with anyone. For Pivot subscribers, shared opps may be accessed perpetually. Non-subscribers receive a link to the opp that will open it for 14 days*)

## **A. Sorting Search results**

1. Title (alphabetical order)
2. Sponsor Name (alphabetical order)
3. Deadline
  - a. Soonest to latest
  - b. Latest to Soonest
4. Amount
  - a. Highest to lowest
  - b. Lowest to highest
5. Top opp types, requirements, etc. for five categories
  - a. Submission type
    - i. Limited Submission
    - ii. Other internal coordination
  - b. Top Funding Types
  - c. Top Sponsor Types
  - d. Top Requirements
  - e. Top Keywords

## **B. The Funding Opp record**

1. Nine fields indexed
2. Profile matches for
  - a. Inside institution
  - b. Outside institution
3. Manipulating/Monitoring
  - a. Track
  - b. Set to Active
  - c. Share

## **C. Shared Opps: Opps may be shared:**

1. When looking at a single opp
2. From a list of search results
3. From a list of Tracked or Active Opps
4. Groups may be created and saved to send Opps
  - a. On the fly; begin typing name of faculty member/Pivot account holder at your organization. If the name has an account in Pivot, auto-fill will make suggestions
  - b. From a list of faculty in scholar profiles

## **D. Received Opps**

1. After Receiving an Opp (from another Pivot subscriber, a local Pivot Administrator) it may be
  - a. Tracked
  - b. Made Active
  - c. Dismissed and removed

## **E. Tracked and Active Opps**

1. May be tagged with any term for an additional access point on end-user's account (*training hint: have a couple tags added to records made tracked or active*)
  2. May be monitored for changes made by COS editor or local Pivot administrator (default setting: *e-mail when updated*)
  3. May be shared with any other Pivot subscriber perpetually; non-subscribers may access shared records for 14 days
- D. Active Opps**
1. Appear on an account's home page after log-in; therefore, this should be regarded as the place to put most important opps (up to ten)
- E. Tracked Opps**
1. Require extra mouse clicks to see **Tracked Opps**
  2. Local Pivot administrator can put opps directly into any user's Tracked area (*Training hint: have at least one opp that shows the graphic indicating this action*)
- F. Saved Search strategies**
1. Clicking name of saved search will yield new opps added in the last week
  2. Page with new opps will show radio button ( "All") to view all opps
  3. Pull-down menu
    - a. Share a saved search with others (only may be shared with someone at a subscribing organization)
    - b. Edit
    - c. Add Tags
    - d. View Archived results (if applicable)
    - e. Alert e-mail off
    - f. Delete
  4. Local Pivot Administrator may put Saved Searches in end-users' accounts

## Scholar's Profiles

Profiles in Pivot are gathered one of three ways:

- 1) **COS Pivot's proprietary searching technology.** This technology searches the open web (primarily .edu sites), looking for profiles of faculty members at four-year colleges and universities who have teaching responsibilities. Pivot profiles are indexed from the information gathered from the web pages searched. Once a profile lands in Pivot, its owner may "claim" their profile and update it.
- 2) **COS Expertise.** COS Expertise was a legacy product that contained approximately 500,000 profiles. These profiles were migrated to Pivot.
- 3) **Suggest a scholar:** Faculty members, Pivot administrators, graduate students with teaching responsibilities, and others may suggest themselves as a scholar. Upon editorial review, they'll be notified whether they've been included.

### I. Quick Search

- A. 'By name' vs. 'By text'

- B. Search within my institution vs. Search outside my institution
- C. Search box automatically puts 'OR' between multiple terms
- D. 'AND', 'NOT' operators may be used
- E. Multiple search terms need quotes ("feline HIV") to search an exact phrase
- F. Wildcard\* (nano\*)

## II. Advanced Search

### A. Community tree:

1. Pivot's indexing for Profiles; classifies scholars in disciplines based on their affiliation
2. Generic listing based on structure of universities and the U.S. Dept. of Education's list of disciplines in higher education
3. Not a subject thesaurus; does not break down into the discrete topics that would be covered under the broader discipline terms
4. Scholar may appear under more than one discipline from the tree; this occurs frequently because scholars may have multiple affiliations and disciplines
5. There are 258 headings in the community tree:
  - a. 15 discipline (level 1) headings
  - b. 144 Level 2 headings
  - c. 90 Level 3 headings
  - d. 9 Level 4 headings

### B. Search Terms Box (works like Quick Search for Pivot Funding)

### C. Check boxes: Nine other attributes may be selected for searching:

1. Expertise
2. Title
3. Keywords
4. Abstract
5. Homepage
6. Scholar name
7. Publication page
8. Affiliation
9. CV page

### D. Pull-down menus:

1. Degree (13 options; multiple may be selected )
2. Role (28 options; ; multiple may be selected )

### E. Other Search Boxes:

1. Name
2. E-mail (a suffix may be searched, e.g.: @yale.edu)
3. Affiliation or society

## Claiming Profiles

Claiming a profile in Pivot is the process of connecting a Pivot account with a profile. The advantages of a claimed profile are:

- I. Pivot will then show an account holder the Pivot Advisor:

- A. Analyzes a Pivot Profile and matches it with Funding Opps
  - B. More detailed a Profile, the better the advisor matches a profile to Funding
- II. Updating Profiles: seven fields
- A. Names (all versions of a name that a scholar has published enter should be entered)
  - B. E-mail addresses (all e-mail addresses that were used for teaching, publishing, etc.)
  - C. Webpages (six options in Pull-down menu)
    - 1. Homepages, online CVs, or a webpages containing publications will be searched and indexed
    - 2. Contents will be indexed for searching and funding matches (Funding Advisor, see above)
  - D. Degrees
  - E. Affiliations
  - F. Publications (See webpages, above)
  - G. Expertise and other info

### **Pivot Support**

- I. Webinars
- II. Pivot YouTube Channel
- III. “Paper”-based documentation + search box
- IV. RefWorks-COS help desk (phone or e-mail)