

Introduction to COS Workbench and Funding Alerts



UNC

GrantSource Library

307 Bynum Hall, CB# 4106

<http://research.unc.edu/grantsource>

919-962-3463 // gs@unc.edu

About COS

COS is a comprehensive funding database with more than 24,000 records representing billions in funding.

Registering with COS will allow you to access COS databases from anywhere; create an expertise profile with research interests, achievements, and other biographical data; save your funding searches; and track individual funding opportunities.

A COS Funding Alert is a custom report, emailed to you once a week, with new or updated funding opportunities from your saved funding searches.

If You Already Have a COS Profile, Login to Your COS Workbench

http://grantsource.unc.edu/funding_alerts.php#cos

- Select *Login to your COS Workbench*.
- Enter your username and password.
 - If you lose your username or password, you may request them from this login page.
- You are now logged into your personal *COS Workbench*.

If You Don't Already Have a COS Profile, Register for One

http://grantsource.unc.edu/funding_alerts.php#cos

- Choose *Register for a profile*.
- Enter your UNC email address in the *E-mail Address* field.
- For *Organization*, select "University of North Carolina at Chapel Hill".
- For *School*, select the name of your school, institute, center or program.
- For *Department*, select your department.
- For *Division*, select your division, where appropriate.
- For *Title*, choose your status, or the title closest to it.
- Create your own username and password. The username must be between 4 and 15 characters in length and the password must have at least 6 characters. Use letters, numbers or the underscore.
- Fill in the contact information fields.
- Click on *Create my Account*.
- Click on *COS Profile*.
- Click on the *Workbench Home* tab at the top right of the page.

Now You Are Ready to Create a Funding Search

- From your workbench, start a search by clicking the *Search COS Funding Opportunities* tab at the top of the screen.
- At the search screen, you can do a simple search, or select *Main Search* (recommended), where you will enter your search criteria into the search fields.
- **5 Recommended fields in Main Search:**
 - **Keywords** - Keywords are terms that describe the field of research or study.
 - Click *Add Keywords* to open the *Keywords Browser*.
 - Find keywords by looking through the keyword folders or by using the search box at the bottom of the window.
 - Select your keywords by clicking on them.
 - Close the *Keywords Browser* window.
 - Uncheck *Explode*.
 - **Requirements** - This field is for terms that describe you and/or the applicant organization. Select all that apply.
 - **Citizenship** - Choose the country or countries of your citizenship.
 - **Activity Location** - Choose the location(s) of your research, study, or travel. Choose *North Carolina* as well as any other state or country where your research or study might take place.
 - **Funding Type** - Select terms that describe the activity for which you seek funding. Click on *Funding Type* for definitions of fellowships, research grants, and other award types.
- For more information on how to complete these fields and other helpful search tips, please see the GrantSource Library handout *Searching COS Funding Opportunities* at:
http://grantsource.unc.edu/funding_databases.php#cos
- Click *Do the search*. You will see a list of results that match your search criteria.

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Save a Funding Search/Receive a Funding Alert

- Click *Save search* at the top of the search results.
- Title your search. You may save up to 40 searches on your *COS Workbench*.
- Your saved searches will then appear on your *COS Workbench Home*, under *Your Saved Funding Searches*.
- You may choose whether or not you wish to have new results from this search emailed to you on a weekly basis. This is your funding alert.
- You may change your decision at any time on your Workbench by checking or un-checking the box under "Weekly Email".

Refining a Funding Search

If you want to add/remove keywords or field information to a saved search:

- Under the subheading *Your Saved Funding Searches*, find the search you wish to refine and click *Edit*.
- Make changes in the appropriate fields.
- Select *Do the Search* to run your newly edited search terms.
- You may save this search with a new title. If you do not save the edited search, it will not appear on your Workbench.

Preview a Search

A Funding Alert will only include funding opportunities that are new to or updated in the COS Funding Opportunities database. To view all of the opportunities listed in the database that match your search requirements:

- Under the subheading *Your Saved Funding Searches*, click *Run Search Now*.
- Review results by scrolling down to the list of records and clicking the name of each grant title.

Deleting or Turning Off an Alert

To delete the search and Funding Alert entirely:

- Under the subheading *Your Saved Funding Searches*, click *Delete*.

To turn off the Funding Alert so that you can access your results only by logging into your Workbench:

- Under the subheading *Your Saved Funding Searches*, uncheck the *Weekly Email* box.

Tracking Individual Opportunities

- Select an opportunity from your search and click on the grant title to view the individual record.
- At the top, select *Track this record on my Workbench*.
- Choose whether to receive email notification when the tracked record is updated.
- Assign a tag name (one word descriptor) to help you organize and remember your tracked funding records.
- Click the *track this record* button to save the record. You may track up to 200 individual funding opportunities.

Sharing Opportunities

- To share a COS funding search:
 - On the COS workbench, under the subheading *Your Saved Funding Searches*, click the *share* link associated with the individual funding search.
 - Complete the form and click the *Send* button.
- To share tracked funding records:
 - On the COS workbench, under the subheading *Your Tracked Funding Records*, select the tag link in the right column, which identifies the tagged records you want to share.
 - If you want to share all the tracked records on your workbench, click *all*.
 - Click *share records* located below the tracked records.
 - Complete the form and click the *Send* 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.