Introduction to COS Pivot Account and Funding Alerts

About Pivot and Funding Alerts
Registering with Pivot will allow you to save your funding searches; receive alerts; and track individual funding opportunities.

Register for a Pivot Account (if not a previous COS user)
http://pivot.cos.com/register
• Fill out all fields. You must use your IU email address. This will be your user id.
• Click Create my account.
• Go to your email account, open the confirmation email, and click the Confirm link.
• Login to your account.
• Click on my account in the upper right corner.
• If asked, select your campus as your affiliation.

Login to Your Pivot Account
http://pivot.cos.com
• If asked, select your campus as your affiliation.
• Click Log in at the upper right corner.

Your Pivot Profile
• If your name at the upper right of your screen is clickable, you have an editable Pivot Profile based on your research record and your profile has already been claimed.
• If your name is not hyperlinked and you see an option to “Claim Profile”, it has not been claimed.
• Click claim profile.
• Click on the This is me button if you see your profile listed.

Note: Users logging in for the first time may notice that their profile has already been claimed. This is a result of the integration of COS Expertise profiles with Scholar Universe.

• If you do not have a profile and you think you should, click claim profile next to your name in the upper right.
• Then select suggest a scholar on the lower left.
• You do not need a profile to save searches or track funding opportunities.

Save a Funding Search / Receive a Funding Alert
• Click Save your query at the top of the search results page.
• Name your search and 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 home tab under Searches.

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

Your Saved Funding Searches
http://pivot.cos.com/alerts

Run a Funding Search
• To view the complete results for a saved search, click run on the right, next to the search you want to see.

Edit a Funding Search
• Click Select a task by the search you want to edit.
• Choose Edit this search.
• 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.

Share a Saved Funding Search
• Click Select a task for the funding search to share.
• Select Share this search.
• Sharing searches creates a link to dynamic information – clicking it will always return current results.

Turn On/Off a Funding Alert
• To turn on a funding alert, click none next to the search and select email weekly from the drop-down menu.
• To turn off a funding alert, click email weekly and select none from the drop-down menu.

Your Tracked Funding Opportunities
http://pivot.cos.com/tracked_opps

Tracking a Funding Opportunity
• While viewing a funding record, click Put opp on in the Tools box to the upper right.
• Choose whether to put the opportunity on your Active list (important opportunities that will appear on your home page) or your Tracked list (non-urgent opportunities you are tracking).
• Assign a tag or tags (one word descriptors) to help you organize your tracked records.

Sharing Opportunities
• While viewing your list of tracked opportunities, click on Share a view of opps in the left column to share all opportunities.
• While viewing an individual opportunity, expand the opportunity you want to share.
• Click on Select a task then Share this opp.
• Sharing searches and tracked opportunities creates a link to dynamic information – clicking it will always return current results.

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