

Introduction to COS Pivot Account and Funding Alerts



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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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