

Pivot Guide



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Account & Profile Set Up

Setting Up Your Account:

1. Go to pivot.cos.com and click on the “sign up” link in the top right corner.
2. Complete the required fields including UTC (the subscribing institution), and click the “create my account” button.
3. You will receive a verification email at the address entered in the account creation process that will include a link to Pivot.
4. Your email address and the password you entered during account creation will be your Pivot username and password.



Account Management

Once you are logged in to Pivot, the website provides some links to manage your profile, account information, and any groups you created for sharing funding opps. Click on your name, and select one of the following:

- **Your Profile or Claim Profile:** If you already have a profile linked to your account, you will see “your profile.” Clicking on this takes you to your profile where you can take action to update your information. If you do not have a profile linked to your account, clicking on “claim profile” will take you to a list of possible matching profiles, one of which may be yours. If no profile currently exists, you can follow the steps to create a profile for yourself.
- **Change Account info:** This takes you to a page where you can change your account username or password and select a different affiliation if your account is affiliated with more than one institution that subscribes to Pivot.
- **Preferences:** Here you can disable search filters that may have been set by your administrator for the university as well as set deadline notification preferences for funding opps that are added to either your tracked or active lists.
- **Change Affiliation:** This option is only displayed if your account is affiliated with more than one institution that subscribes to Pivot.
- **Groups:** This is where you can create pre-defined groups for sharing funding opps.
- **Sign out:** This will end your session and log you out of Pivot.

Deadline Notification Preferences

This feature allows you to set a default deadline reminder timeline and notification preference for all funding opps as they are added to your Active or Tracked lists. Select your preferred notification method: email, notification from the Pivot announcements link, or both. Then

select how far in advance of each

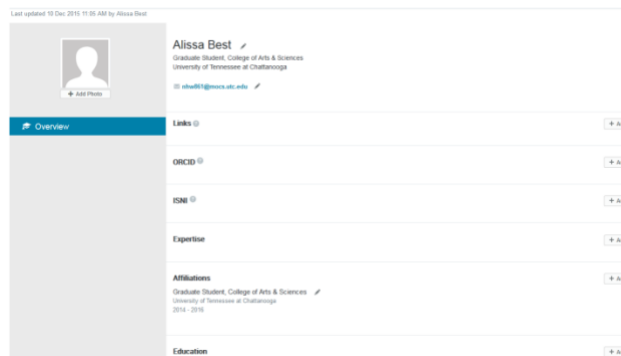
deadline on the funding opps you wish to receive a reminder using the options provided. You can set different deadline notifications for Active and Tracked, or only set reminders for one of the two. In addition, you can alter the deadline reminder for any funding opportunity on either list by selecting the “edit deadline reminder” on the Options menu for any funding opp on either list.

Deadline Notification Preferences

When I add opps to Active, send deadline reminder via	<input type="checkbox"/> Pivot Announcements	<input type="checkbox"/> My Email	2 weeks	before a deadline
When I add opps to Tracked, send deadline reminder via	<input type="checkbox"/> Pivot Announcements	<input type="checkbox"/> My Email	2 weeks	before a deadline

Steps for Creating a Profile

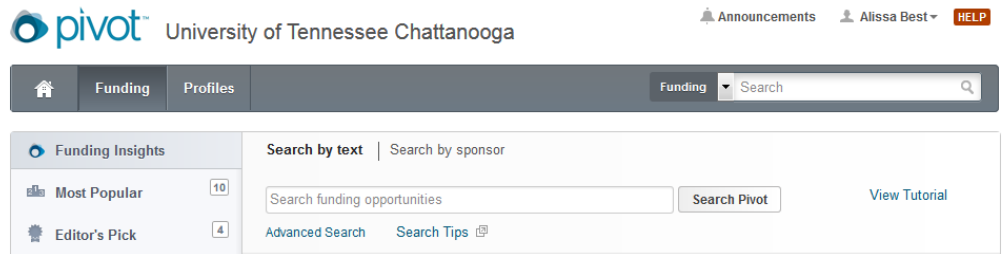
1. Once your account is set up, you can create a profile. Click on your name in the top right corner and select the first option in the drop down menu “claim profile.” Once on the page, select the “create your profile” option. The profile set up will pop up in a new browser.
2. Once the basic profile setup is complete, you can view your profile, customize it further, add a photo, or include links.



Getting Started with a Search – Quick

The Pivot Quick Search option is the easiest way to conduct a broad search of funding opportunities. To get started with Quick Search, click on the following:

1. To get to Quick Search, click on the Funding tab at the top of the screen.
2. The Quick Search bar will appear at the top of the funding screen. There are two search options to choose from: **(1) Search by text:** searching for funding by text allows you to easily search across all fields in a funding opportunity providing you with broad search results. **(2) Search by sponsor type:** Searching by sponsor allows you to search our entire list of sponsors using the blank space provided or to browse the sponsor list alphabetically by: All Sponsors, US Federal Sponsors, or Non-US Federal sponsors. To **search** for a specific sponsor and find all open opportunities from that sponsor, type the sponsor name in the blank space. To **browse** the sponsor list alphabetically, click on your choice of sponsor subsets—All Sponsors, US Federal Sponsors, or Non-US Federal sponsors. Please note that if the sponsor name is hyperlinked, the sponsor currently has open opportunities.



Getting Started with a Search – Advanced

The **Advanced Search** allows you to construct a targeted, field-specific search using search boxes, browsing windows, and pick lists. To conduct an Advanced Search, click on the following:

1. Log onto Pivot and select the Funding Tab. From there, click “Advanced Search.”
2. Choose a matching option. These options allow you to either narrow or broaden your search criteria depending on your selection. Two options are available: **(1) Match All of the Fields:** This will retrieve records including ALL of your selected search criteria. This is the default option and is used unless another option is selected. **(2) Match Any of the Fields:** This will retrieve records including ANY of your selected criteria.
3. Make a selection from the drop-down (**All fields, Abstract, Title, Sponsor, Sponsor ID, or CFDA Number**). Complete as many boxes and rows as needed. You can include additional rows by clicking on the **add another row** link.
4. In the Search Fields area, enter the information in the fields relevant to your search. You can display additional search areas: **Amount, Deadlines, Limited Submission/ Internal Coordination, Activity Location, Citizenship, Funding Type, Keywords, Requirements, or Sponsor Type.**
5. At the bottom of the page, you can exclude fields from your search. You can exclude any combination of terms as well as exclude information in the areas mentioned above.

A screenshot of the 'Funding Advanced Search' form. The title is 'Funding Advanced Search' with a 'View Tutorial' link. Below the title, it says 'Find Opportunities matching'. There are two radio buttons: 'Match all of the fields' (selected) and 'Match any of the fields'. A 'Search' button and a 'Clear All' link are on the right. Below this, there are three rows of search criteria, each with a dropdown menu (all set to 'All Fields') and an input field. The first row has 'or' separators between the input fields. Below the search criteria, there is a '+ Add another row' link and a 'Clear' link. At the bottom, there is a list of search fields with expandable arrows: Amount, Deadlines, Limited Submission, Activity Location, Citizenship or Residency, Funding Type, Keyword, Applicant Type, and Sponsor Type.