CREATING YOUR ACCOUNT
If you don’t have a Pivot account, go to http://pivot.cos.com and click on the Sign up link in the upper right of the screen. Fill out your Name, Email, Password, and Affiliated Institution. (The email you register with must be the email at your affiliated institution. Pivot will not allow you to create an account if you enter a non-institutional email address.) Click the “Create my account” button and Pivot will send you an email to the address you supplied; in the email will be a verification URL. Click on the URL and you can begin using Pivot right away!

LOGGING IN
There are two ways to access Pivot:
1) Use an on-campus computer and go directly to http://pivot.cos.com.
2) Log into Pivot at http://pivot.cos.com with your username and password. (If you have an old COS.com username and password, it will work with Pivot.) If you don’t already have one, you can create one from the same page. If you’ve forgotten your log in information, click the “Login help” link for assistance.

You can log in to Pivot from off-campus to access your account and search for Funding or Scholars. You can also log in to Pivot from on-campus if you wish to view your Pivot homepage, manage your Funding Alerts, and/or view your tracked or active opportunities.

NEED MORE HELP?
Online Tutorials and Help Docs
Tutorials, Help documents, and FAQs are available online to learn more about Pivot. Click on the Support tab after you log in to your Pivot account.

Webinars
Complimentary training webinars are available for Pivot. A complete listing of webinar sessions can be found on www.refworks-cos.com/training. New dates and times are added monthly.

Online Support
Click on Contact the Help Desk on the bottom of the Support page to fill out a form that will go to our help desk staff. Or, email them directly at support@refworks-cos.com.

Phone
Contact the help desk at +1.775.327.4105.
SEARCHING PIVOT FUNDING
There are several ways to search the Funding area of Pivot: Quick Search, Advanced Search and Sponsor search.

QUICK SEARCH
Use the Quick Search feature to search all fields of the funding opportunities in the database. To produce maximum results, all search terms entered are connected by the Boolean connector OR. In addition, searches retrieve embedded terms – a search for “art” retrieves funding opps with “heart,” “part,” etc. The results of a Quick Search are always ranked by relevancy.

1. Enter your search terms into the text box.
2. Click the “Go” button.

ADVANCED SEARCH
1. Start by selecting the Match All or Match Any radio button at the top of the screen. This selection will add “And” or “Or” to the search rows beneath the option.
2. Click on the drop-down menu to select which field to search (All Fields, Abstract, Title, Sponsor, or Sponsor ID).
3. Enter your search terms into the boxes. If additional rows are needed, click Add another row.
4. Additional fields are available – click on any field name to expand the field options or click More search attributes to fill out more criteria.
5. Click Search.

Helpful Hint: You can determine which opportunities to exclude by entering terms in the Exclude These section.
Also note that your campus administrator may have pre-set Activity Location and/or Citizenship filters that are automatically included in your Funding Search. If those filters are set, you will see them at the top of the search screen. You can remove them by deselecting the check boxes to the left.
**SPONSOR SEARCH**

The Pivot Sponsor Search is a predefined search that allows you to search for a specific sponsor and view funding opportunities or search for a sponsor name.

1. On the main Funding page, click the **By Sponsor** link located above the Quick Search box.

2. Enter a sponsor name in the text box or click on a link below the search box to view **All sponsors**, **U.S. Federal sponsors**, or **Non-U.S. Federal sponsors**. If you choose **All sponsors**, please be patient as the list will take some time to display.

Note: Many Sponsor names are listed under the name of their larger controlling entity. Example: The National Institutes of Health (NIH) is listed as one of the departments in the United States Department of Health and Human Services, under “U.” The Sponsors included in this list may change over time as opps are added and removed from the database.

**SEARCH RESULTS**

There are two different ways to refine your search from the results page: Refine Your Query or Faceted Searching.

**REFINE YOUR QUERY**

1. From the search results page, click on **Refine Your Query** at the top of the page. This option will take you to the Advanced Search page, which will display your previous criteria search strategy.
REFINE YOUR QUERY

2. Add or remove criteria to narrow down or broaden your original search.

3. Click Search.

FACETED SEARCHING

Faceted Searching lets you drill down to include more specific criteria without having to go back to your original search.

1. On the search results page, go to the left side of the page, where you will find the Faceted Search area. This area will break down your search results into specific categories based upon Submission Type, Top Sponsor Types, Top Funding Types, Top Requirements, and Top Keywords.

2. Click on the specific faceted search criteria to narrow down your results. Your results list will refresh after you select a facet.
SAVING A SEARCH

1. From the search results page, click on Save your Query at the top of the page. (If you are not logged in, the system will prompt you to enter your Pivot username and password.)
2. Enter a name for your saved search in the text box.
3. Indicate whether or not you would like to receive a weekly email with new or updated opps from this query, using the checkbox.
4. Click Save.

SAVING A FUNDING OPPORTUNITY TO A TRACKED OR ACTIVE LIST

Saving Funding Opportunities in your Pivot account allows you to maintain two separate lists of opportunities you are interested in. Your active list will be a shorter list of the most important opps, and your tracked list will be a longer list that you still wish to keep track of. When you save an opportunity, you will have the option to choose which list you want the opp on. You are allowed to save an unlimited number of opps, so Pivot will also allow you to group similar opps together.

There are two ways to save funding opps. The first is using the tool box at the top of the results page; the second is from within the individual opportunity.

FROM THE FUNDING RESULTS PAGE

1. From the search results page, select which opps to tag.
2. In the Tool Box, Click Put Opp on and choose to put the opps on your tracked list or your active list.
3. Using the check box, choose if you would like to receive an email when there are updates to these opps.
4. Enter a new tag or select from your existing tag list.
5. Click Submit.

FROM AN INDIVIDUAL OPPORTUNITY

1. Click the opportunity name from the search results page to view the complete details.
2. Using the tool box on the right side of the opportunity, click Put Opp on and choose to put the opps on your tracked list or your active list.
3. Using the check box, choose if you would like to receive an email when there are updates to these opps.
4. Enter a new tag or select from your existing tag list.
5. Click Submit.
SHARING A SEARCH

1. Log in to your Pivot account and click Searches and then View Your Full List of Saved Searches.
2. Click Select a Task and then Share This Search.
3. Enter the name or the email address of the person that you wish to share this search with.
4. Include an optional message.
5. Click Share.

Note: A unique URL will be generated so you or your colleagues can click to access the full results list of this search strategy. This URL can then be posted to a website, electronic newsletter, listserv, etc. Your colleagues must belong to a Pivot-subscribing institution to view the results, otherwise, he/she will get an error message when trying to view the search results. Users will need to login with a Pivot username and password if trying to view the results from off-campus.

SHARING A FUNDING OPPORTUNITY

You can share funding opportunities three ways within Pivot—from the opportunity itself, from a funding results list, or from your Active or Tracked list.

FROM THE OPPORTUNITY

1. Run a Funding search.
2. Select the opportunity you wish to share.
3. In the tool box, click Share with Faculty.
4. Enter the name or email address of the person you wish to share the opportunity with, include an optional message, and click Share.

FROM A FUNDING RESULTS PAGE

1. Run a Funding search.
2. Select the opportunity(ies) you wish to share.
3. In the tool box, click Share with Faculty.
4. Enter the name or email address of the person you wish to share the opps with, include an optional message, and click Share.

FROM YOUR ACTIVE OR TRACKED LISTS

1. Select the opportunity you wish to share.
2. Click Select a task and then click Share this Opp.
3. Enter the name or email address of the person you wish to share the opp with, include an optional message and click Share.

Note: You can also share all of your active or tracked opps or a group of tagged opps. On the left side of the screen, click Share a View of Opps. If you have not narrowed your view by clicking on a tag, you can share all of your active or tracked opps. If you have narrowed your view by clicking on a tag, you can share those specific opps.