COS Pivot Quick Reference Guide

To create a Pivot account
- From a Purdue domain computer, visit https://pivot.cos.com/register
- Complete the required fields. Make sure to use your Purdue email address. Choose *Create my account.*
- In your email inbox, open the confirmation email, and click the *Confirm* link.

    NOTE: Your Purdue email address is your user ID.

To claim your Pivot profile
- Once logged in, click the dropdown menu located next to your name in the upper right-hand corner of the screen.
- Choose *Claim Profile*. *If it shows *Your Profile*, then you have already claimed your profile and can instead edit it from this option. This may be residual from integration of COS Expertise.
- Click on *This is Me* if your profile is suggested. If not, choose *Suggest a Scholar* on the left-hand side of the screen.

NOTE: A profile is not necessary to save searches or track funding opportunities. However, by claiming your profile, you activate the *Advisor* functionality.

To create a funding search
- From the *Funding* tab within Pivot, choose *Advanced Search* below the top Search box.
- Set your search criteria using the Search fields. Click *Search*.

To save a funding search and receive an email alert
- While your search results are shown on the screen, choose *Save Search* at the top of the page.
- Choose a name for your saved search.
- To receive weekly email alerts of new opportunities that fall within your search criteria, keep the checkbox selected.
- Choose *Save*.

To access your saved searches and results
- Go to http://pivot.cos.com/alerts while logged in.
- Click on the link for your named search.
- Choose the radio button for *All* at the top of the results list.

To edit a saved search
- From your *Saved Searches* page, expand the dropdown box for *Options* to the right of your named search.
- Click *Edit* and make any required changes to the search criteria.
- Once you have hit *Search* and the new results are shown, choose *Save Search* at the top of the page to save the changes.

To share a saved search
- From your *Saved Searches* page, expand the dropdown box for *Options* to the right of your named search.
- Click *Share* and enter your Recipient's email address and an optional message. Then hit *Send*.

To turn a funding alert on or off
- From your *Saved Searches* page, expand the dropdown box for *Options* to the right of your named search.
- Choose *Alert email off/on* as needed.

To track or share a funding opportunity
- While viewing a funding opportunity record, choose *Track* in the upper right-hand corner.
- Within the record, you can also select *Share* and enter your Recipient's email address and an optional message. Then hit *Send*.

To view and edit tracked opportunities
- Go to http://pivot.cos.com/tracked_opps
- In the checkbox, select the desired opportunity, and then choose *Share* or *Untrack* as needed.

To view help topics or tutorials, go to https://pivot.desk.com/.
For Purdue assistance, contact Sue Grimes (sgrimes@purdue.edu) or Kristyn Jewell (kristynj@purdue.edu).

Where funding connected with researcher expertise turns into success.

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Log on at http://pivot.cos.com