

What is COS Pivot?

For years, COS has been recognized around the world for its coverage and inclusion of funding from a wide variety of sources as well as its access to the world's research community.

Now, Pivot provides Research Administrators, Research Development Professionals, and individual faculty members the edge—by bringing together the right research opportunities, funding, and people—quickly and easily. It provides global and local connections that strengthen research by exploring new avenues for funding and collaboration—for faculty, staff researchers, and graduate students.

Built from the ground up, Pivot combines the best of what our customers love in our world-renown COS Funding Opportunities and COS Scholar Universe with intelligent mapping features that expedite funding discovery, dissemination, and collaboration. With Pivot, connecting the right opportunities with the right people is routine.

Pivot is a power tool that

- Provides access to the most comprehensive global source of funding opportunities—totaling billions of dollars and growing
- Identifies researcher expertise from within or outside of your organization from millions
- of profiles from leading research organizations worldwide
- Fosters collaboration by cultivating essential partnerships and alliances
- Enhances communication, monitoring, and tracking amongst individual faculty, teams, or researchers and the Research Development office
- Allows the focus to be on winning the necessary awards and grants
- Builds strong network connections for future opportunities

Browser Compatibility

Pivot is compatible with the following browsers on most recent platforms:

Windows

- Microsoft Internet Explorer 8.0*
- Firefox 3.6.x and 4.x.

*we do not recommend using Internet Explorer 7 as you may experience reduced functionality.

Mac

- Chrome 10.6

Your COS Pivot Account

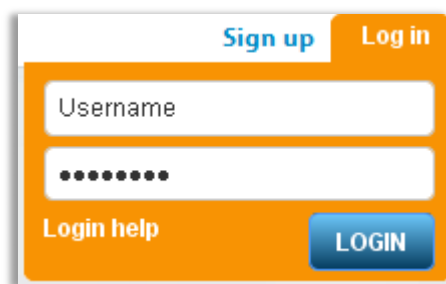
If you had an account for COS Funding Opportunities, you will use that same username and password for Pivot. If you do not have a current COS account, you will need to create an account.

Logging in to COS Pivot

Pivot login is presented in the top right-hand corner of the pages in Pivot. You must be logged in to

- View your homepage displaying your Active and Tracked opps
- View funding opps shared with you or the status of those you have shared with others
- Save a search
- Add an opp to Active or Tracked
- Share a funding opp
- Claim and/or update a profile

Enter your username and password in the Pivot Login box to start your Pivot session and complete the actions listed above.

The image shows a login box with an orange border. At the top, there are two tabs: "Sign up" in blue text and "Log in" in white text on an orange background. Below the tabs are two input fields: the first is labeled "Username" and the second contains a series of dots representing a password. At the bottom left, there is a link "Login help" in orange text. At the bottom right, there is a blue button with the word "LOGIN" in white capital letters.

Creating your Pivot account

If you do not have a current account

- Click on the **Sign Up** link
- Complete the required fields including the name of the subscribing institution to which you belong
- Click the **Create my account** button

- You will receive a verification email at the address entered in the account creation process which will include a link to Pivot.
- Your email address and the password you entered during account creation will be your Pivot username and password.

Login help

Login help link takes you to the Login Help Options page where you can link to the following links:

- **Create your Pivot account** – see information above
- **Forgot password** – this link takes you to the form to complete to be sent your password
- **Contact Help Desk** – if you need additional assistance logging in to Pivot, let us know how we can assist you and someone from the Help Desk will be in contact with you within one business day.

My account

Once you are logged in to Pivot, we provide you with a link to manage your account. Click on the 'account' link next to your name for the following options:

Account Information

- **Change account information** – select this option to change your user ID (username) or password.
- **Select your Pivot affiliation** – this option is only display if your account is affiliated with more than one institution that subscribes to Pivot.
- **Contact Help Desk** – if you need additional assistance with your account, select this option to send information to the Help Desk.
- **Institutional Settings for Funding Opps Search** – allows you to disable any pre-set activity location and citizenship/residency requirements used when searching for funding, that have been established by your administrator.

Groups

The groups area allows you to create pre-defined lists (groups) of email addresses which you can use when sharing funding opps or saved searches in Pivot. You can edit, rename or delete groups in this area.

To create a new group from the **Account** area:

- Click Account.
- Click Groups
- Click New Group
- Enter a name for your group

- Enter the people for your group – if you are adding colleagues from your Institution, simply type the name and if they have a Pivot profile, their email address will display.
- To enter people who are not in your institution, type the email address and click the “tab” key after entering the email address.
- When you have finished entering names and/or email addresses, click Submit.

Creating and Updating Your Profile

One of the benefits of COS Pivot is that we have over 3 million faculty profiles created and maintained by our Editorial Team. This takes the updating burden off you! We review profiles on average every 12 to 18 months. If you have pertinent information you need added or changed in your profile, you can make certain updates or additions on your own. You can even attach certain types of files that COS Pivot will index and make searchable until the information is confirmed and added to your profile.

If you have a profile linked to your account, once you log in to Pivot your name will be linked directly to your profile and you will see the prompt to update your profile. If your name is not linked, you will need to either claim an existing profile or create a profile.

Claiming an Existing Profile

Claiming an existing COS Pivot profile is not required in order to use COS Pivot, however, there are certain benefits you receive by doing so:

COS Pivot Advisor: The Advisor makes funding opp recommendations for you based on your profile. These recommendations are automatically available on your COS Pivot Homepage when you have claimed your profile. If you do not claim or create a profile, you will not see the Advisor recommendations on your homepage.

Updating your own profile. If you do not **Claim your profile**, you cannot update it. Why make sure your profile is updated? Your profile is viewed by thousands of COS Pivot users who may be looking for potential collaborators for a research project. You may be overlooked because your profile is missing critical information.

To claim an existing profile:

- 1) Log in to COS Pivot.
- 2) In the upper right-hand corner, your name is displayed. If you see a **Claim profile** link, you know there is not a profile linked to your COS Pivot account. Click the **Claim profile** link.
- 3) A list of potential profile matches (from within your institution) may be displayed. If no matches occur, you can choose to look for potential matches outside your institution by clicking on the appropriate checkbox above the results list.
- 4) If you locate your profile from the results list, click the **This is me** button to the right of the profile name. If no results display, click the **Suggest a scholar** link located to the left of the results list.

- 5) After clicking on the **This is me** button, a message will be displayed informing you that you that a new window will be opening to complete the profile claim process.
- 6) You will then be asked to confirm whether or not you still have access to the email address listed on your COS Pivot profile.
- 7) If you confirm that you still have access to the email on your profile, you will receive verification email to that address that will link your profile to your account and will grant you access to update your profile.
- 8) If you do not have access to one of the emails displayed, select **I no longer have access to any of the above email addresses** and hit the submit button and you will be taken to a form to complete to request access to edit your profile. The information submitted is reviewed by our editorial team and once validated, you will receive an email at the new email address submitted which links your profile to your account and grants you access to update your profile.

Updating your COS Pivot profile:

COS Pivot provides the capability for you to update certain fields or areas of your profile. Updating your profile can increase the the quality of the funding matches recommended for you from the COS Pivot **Advisor**.

You can currently submit updates for the following fields:

- Name
- Email address(es)
- Webpages with publications
- Degrees
- Affiliations (both past and present)
- Other (this is an open text box that allows you to provide additional feedback that you cannot submit through the above fields, such as research interests)
- Upload a CV or publications list in .pdf, .doc., or .txt format. Documents submitted to your profile are indexed and searchable (as are webpages).

Change submissions are editorially reviewed, there is an approximate two week turnaround time for the changes/updates you submitted to be viewable on your profile.

Scholar Feedback:

[Welcome](#) [Names](#) [Email Addresses](#) [Webpages](#) [Degrees](#) [Affiliations](#) [Publications](#) [Other Information](#)

Thank you for your interest in editing your profile. The information that is contained in your profile comes from public sources of information, such as your university's website, databases of publications, and other vetted sources. We welcome your input to augment and update the information displayed.

Use the following feedback forms to tell us about changes to your name, email address, webpages, degrees, affiliations, and other information. If you do not have an online CV or publications page, you can upload either of these as a document or pdf. All changes are reviewed before being added to your profile.

For more information on your profile, please contact the [Profile Help Desk](#). Visit [RefWorks-COS.com](#) for information on our products and services.

To change or update your COS Pivot profile:

- 1) Log in to your COS Pivot account.
- 2) Click on your name (which is hyperlinked to your COS Pivot profile)
- 3) Click the **Update your profile** link near the right of the screen.
- 4) Clicking the **Continue** button will take you to the **Scholar Feedback**.
- 5) Click any of the headers across the top and you can edit the relevant information for those specific areas of your profile.
- 6) Follow the instructions for the information you are updating. Publication information can only be uploaded in a document saved as a .pdf, .doc., .docx or .txt file.

Your submissions will be reviewed by the Editorial Team and will be viewable in COS Pivot in approximately two weeks.

To create a COS Pivot profile for yourself (or for someone else):

- 1) Click the **Suggest a scholar** link on any profile search results page.
- 2) Enter the name of the person you would like a profile created for.
- 3) Once you submit the name, you will be shown a list of profiles that have already been created that may represent the person you wish to have added.
- 4) If you find a profile from the list that represents the person you wish to have added, no further steps are required, since a profile already exists.
- 5) If no profiles are returned or none of the profiles from the list represent the person you wish to have added, click the **No match** button.
- 6) You will be brought to a new page where you will be prompted to enter some information about the person you wish to have added. Fill out as much information as you can, paying attention to the required fields.
- 7) Click the **Submit** button when finished.
- 8) Once a profile for the person has been created, you will receive a confirmation from the COS Pivot Editorial Team.