

## Instructions for Using COS Pivot

### **Creating an account**

Creating a Pivot account is easy - users can go <http://pivot.cos.com> and click the “Log In” option in the upper right of the screen. Clicking on “Login help” will present them with a screen where they can choose to create their account. The researcher/user will gain access to Pivot by indicating he or she is affiliated with your institution.

### **Logging in**

Users can log in at <http://pivot.cos.com> with a Pivot username and password anytime, anywhere. Logging in this way will take users to their Pivot homepage. From their homepage, they can manage active or tracked funding opportunities, saved searches, shared opportunities, etc., and start searching for funding or scholars. Username and password access is necessary when a) a user is off-campus, or b) when a user needs to save a funding record or funding search.

### **Claiming/Creating your Profile**

Pivot contains a community of scholars database that may already include many of our users. To “claim” your page, can click on the profiles tab and search for your name. If your name comes up, you’ll click on the button to claim your profile. From here you will be able to edit your profile. If your name does not appear, then you will want to create a new profile. Other users/researchers may use these profiles to find you as a collaborator, review your CV, etc. In addition, if you choose, the system can use the information in your profile to search for funding for you.

### **Online Support and Training**

The Technical Services team is also available to assist you with any issues that come up while using COS Pivot. Click on the Support tab from your Pivot homepage to reach our support desk or email them at [Support@refworks-cos.com](mailto:Support@refworks-cos.com). Extensive help documentation is also available in the Support area.

There are regularly offered webinars on COS Pivot. You can find the training schedule at [www.refworks-cos.com/training](http://www.refworks-cos.com/training) and clicking on COS Pivot. New and updated training information is always mentioned in the bi-monthly newsletter we product. This newsletter will be emailed out via the grantswatch listserv. COS also currently has recorded webinars which you can access from within COS Pivot by clicking on the Support tab. To register for a webinar, click on the upcoming training and register. To view a recorded webinars, click on the link(s) on the Support tab to view the appropriate sessions.

They also are launching brief training videos on You Tube. There will be new videos added weekly and you can access those here: [www.youtube.com/proquestpivot](http://www.youtube.com/proquestpivot).

Please feel free to contact me if you have any questions,

Best regards,  
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