<u>Instructions to Access Pivot</u>

To create a Pivot account, go to http://pivot.cos.com and click the "Sign up" option in the upper right of the screen (circled in red in the screen capture below). Use your @kctcs.edu email address to sign up. Choose "Kentucky Community and Technical College System" as your affiliated institution, regardless of your college.

All users can log in at http://pivot.cos.com with a Pivot username and password anytime, anywhere. Logging in will take you to your Pivot homepage, where you can start searching for funding and manage active or tracked funding opportunities, saved searches, shared opportunities, etc.

<u>Support and Training</u>

On the following pages, you will find a "Quick Start Guide" to get you up to speed on the service. Please note that the "Logging In" section refers to two ways to access Pivot but KCTCS users may only use the second way ("2) Log into Pivot at…").

More information can be found in the Getting Started section of the Support page in Pivot and on their YouTube channel at: www.youtube.com/proquestpivot.

Other resources include a Libguide http://proquest.libguides.com/pivot and live and recorded training sessions. You can find the training schedule and past webinars at http://www.proquest.com/customer-care/training-webinars/ (click on "Pivot for Researchers, Faculty and Staff").

The Pivot Technical Services team is available to assist you with any issues that come up while using Pivot. Click on the Help area from within Pivot, and then the "Contact Us" link to reach their support desk, or e-mail them directly at pivot.support@proquest.com. Extensive help documentation is also available in the Help area.

pivot™ *funding connected*

QUICK START GUIDE

http://pivot.cos.com

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 Help button at the top of any page in Pivot or the Help/Support link at the bottom of any page.

Webinars

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

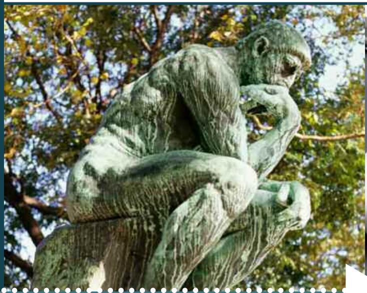
Online Support

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.

ProQuest® Start here.



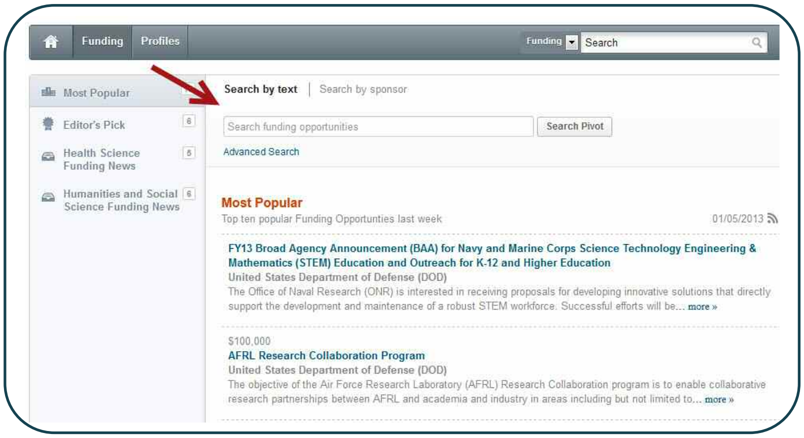
SEARCHING PIVOT FUNDING

There are several ways to search the Funding area of Pivot: Quick Search, Advanced Search and Sponsor search.

QUICK SEARCH

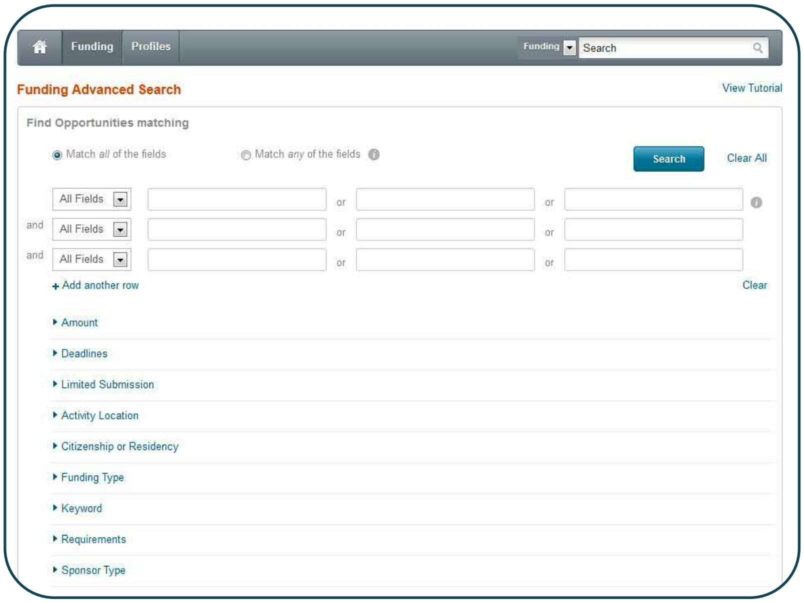
Use the Quick Search feature to search all fields of the funding opportunities in the database. To produce maximum results, all search terms entered are connected by the Boolean connector OR. The results of a Quick Search are always ranked by relevancy.

1. Enter your search terms into the text box.
2. Click the "Search Pivot" 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.
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 to conduct a search that will display all opps offered by that sponsor or click on a link below the search box to view the names of **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. If the names are hyperlinked, clicking on the sponsor name will display the funding opps offered.

Note: Many Sponsor names are listed under the name of their larger controlling entity.

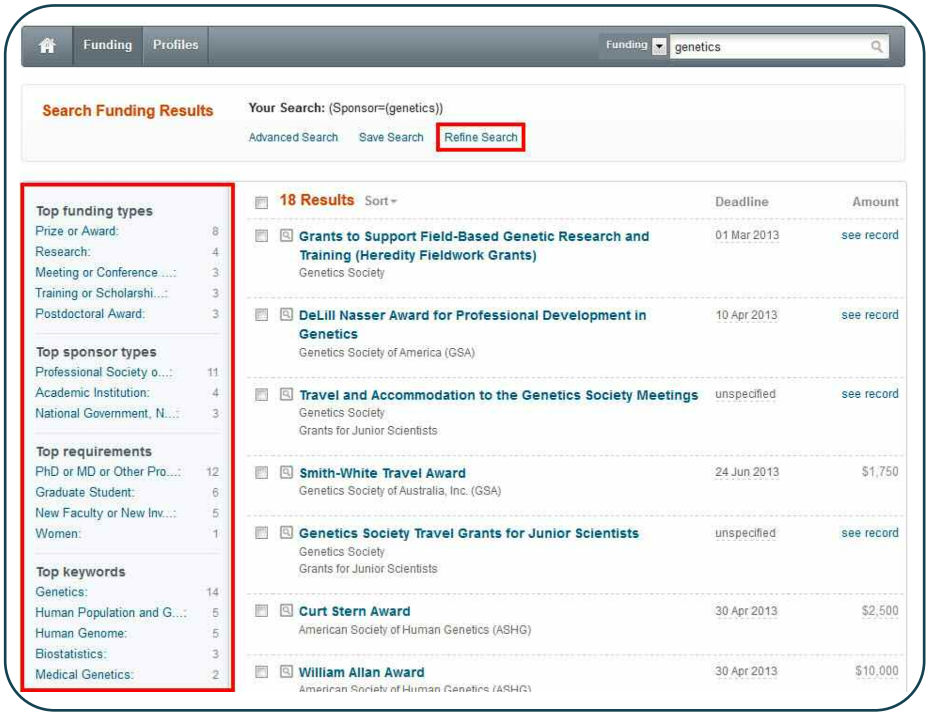
Example: The National Institutes of Health (NIH) is listed as one of the departments in the United States Department of Health and Human Services, under "U." The Sponsors included in this list may change over time as opps are added and removed from the database.

SEARCH RESULTS

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

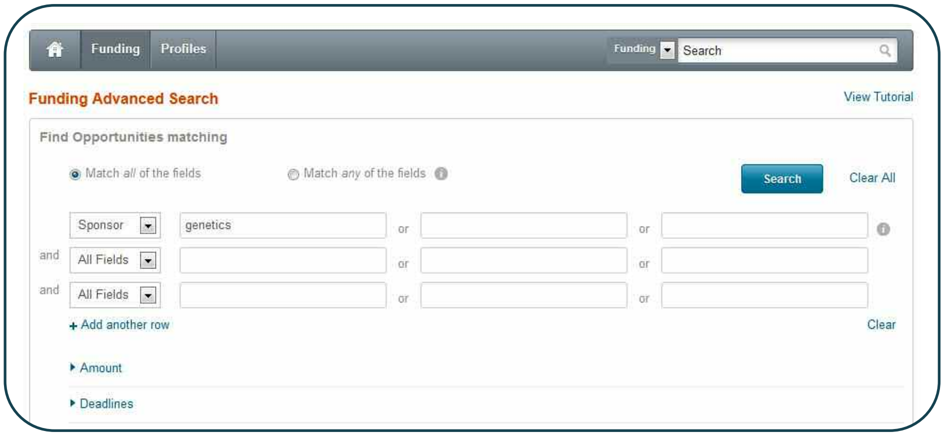
REFINE YOUR QUERY

1. From the search results page, click on **Refine Search** from the top of the page. This option will take you to the **Advanced Search** page, which will display your previous search strategy.



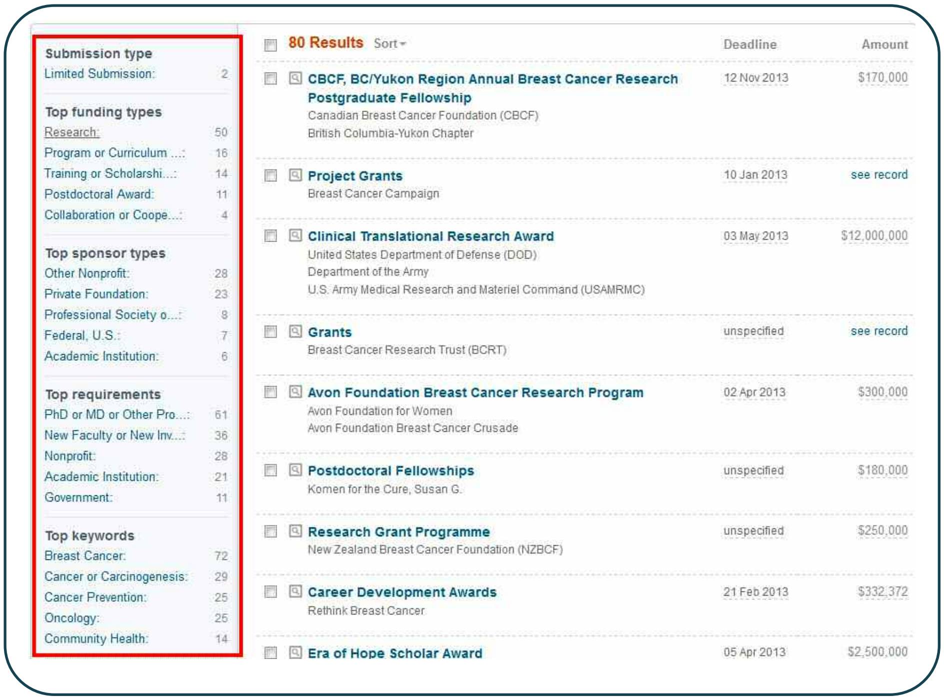
REFINE YOUR QUERY

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 Funding Types, Top Sponsor Types, Top Requirements,** and **Top Keywords**. Above the facets, you may notice that your results are also filtered by country for citizenship and residency and/or activity location. These filters are set by your Pivot Administrator and you can opt to remove the filters from your search query by clicking on the “x” next to the filter.
2. Click on the specific faceted search criteria to narrow down your results. Your results list will refresh after you select a facet.

SAVING, TRACKING AND SHARING

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 alert email with new or updated opps from this query, using the checkbox.
4. Click **Save**.

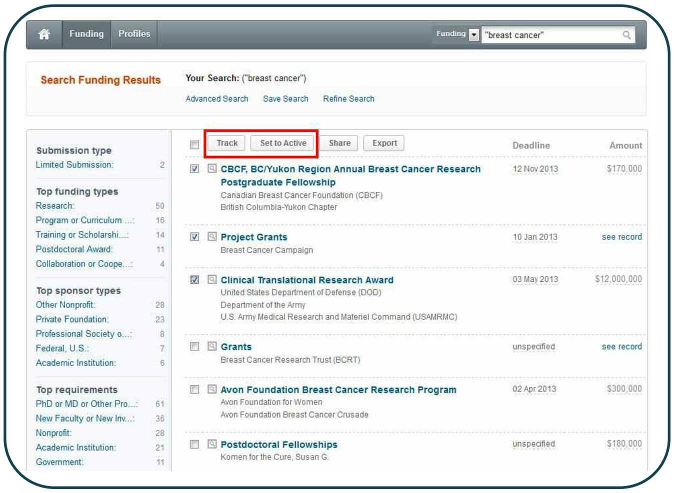
SAVING A FUNDING OPPORTUNITY TO A TRACKED OR ACTIVE LIST

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 your very important opps, and your tracked list will be a longer list of opps 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.

There are two ways to save funding opps. The first is by selecting opportunities from your search results list, which will display options for tracking; the second is from within the individual opportunity.

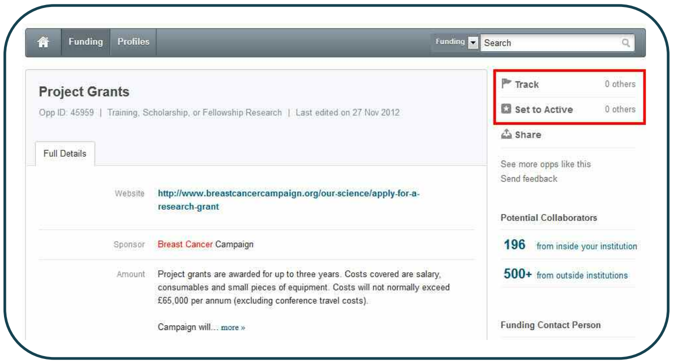
FROM THE FUNDING RESULTS PAGE

1. From the search results page, select which opps to save.
2. Click **Track** or **Set to Active** and choose to put the opps on your **tracked list** or your **active list** (opps cannot be on both lists).
3. By default, you will receive an email when there are updates to these opps. If you do not wish to receive an alert, de-select the email option.
4. Enter a new tag or select from your existing tag list.
5. Click **Add**.



FROM AN INDIVIDUAL OPPORTUNITY

1. Click the opportunity name from the search results page to view the complete details.
2. Click **Track** or **Set to Active** depending on whether you want to put the opp on your **tracked list** or your **active list**.
3. By default, you will receive an email when there are updates to these opps. If you do not wish to receive an alert, you'll need to modify your preference from your Pivot home page Active or Tracked list.
4. Enter a new tag or select from your existing tag list by clicking **Add tag** (which will display once you choose **Track** or **Set to Active**).



SHARING A SEARCH

1. Log in to your Pivot account and click **Saved Searches**.
2. Click **Options** and then **Share**.
3. Enter the name or the email address of the person that you wish to share this search with.
4. Include a message if you would like.
5. Click **Send**.

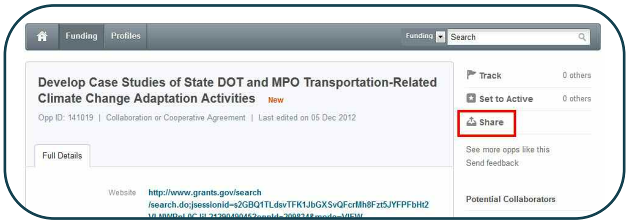
Note: A unique URL will be generated so you or your colleagues can click to access the full results list of this search strategy. This URL can then be posted to a website, electronic newsletter, listserv, etc. Your colleagues must belong to a subscribing institution to view the results; otherwise, he/she 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.

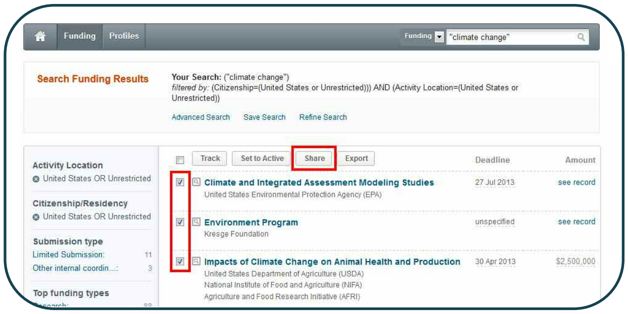
FROM THE OPPORTUNITY

1. Run a Funding search.
2. Select the opportunity you wish to share.
3. Click **Share**.
4. Enter the name or email address of the person you wish to share the opportunity with, include a message, and click **Send**.



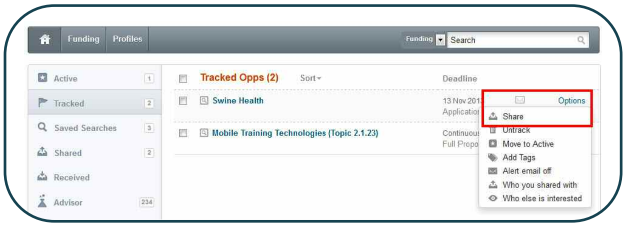
FROM A FUNDING RESULTS PAGE

1. Run a Funding search.
2. Select the opportunity(ies) you wish to share.
3. Click the **Share** button.
4. Enter the name or email address of the person you wish to share the opps with, include a message, and click **Send**.



FROM YOUR ACTIVE OR TRACKED LISTS

1. Select the opportunity you wish to share.
2. Click **Options**, and then click **Share**.
3. Enter the name or email address of the person you wish to share the opp with, include a message, and click **Send**.



Note: You can also share all of your active or tracked opps or a group of tagged opps. Select the opps you wish to share and click the **Share** button at the top of your list. 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.