PIVOT QUICK START GUIDE
Set Up an Account and Create, Save and Set Up Alerts Tied to Search Terms

Pivot is a premier subscription database for locating funding opportunities to support research. Your Stanford affiliation allows you access to Pivot. This guide explains how to set up an account and then create, save and set up funding alerts tied to search terms you provide. The Pivot website has more detailed descriptions and tutorials to help refine your search parameters.

Step 1. Set up a Pivot Account

1. Link to Pivot: **http://pivot.cos.com**.
2. Click **Sign Up** at upper right.
3. Fill in all fields (use your Stanford email address).

Future Access

1. Link to Pivot (above), click **Log In** at upper right.
2. Enter User Name (Stanford email), password. (Permits on campus access to all Pivot features and off campus access to your account and Pivot search features.)

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Step 2. Create, Save & Set Up Alerts

Create, save and set up email alerts tied to search terms in two ways: (A) Quick Search or (B) Advanced Search.

A. Quick Search
Quickly creates and saves a search, but results are broad.

1. Log in, click **Funding** in top ribbon.
2. Type your search term in box below bolded **Search by text** (default setting).
3. Click **Search Pivot**.
4. Use filters in left column to narrow results.
5. Click **Save Search** at center/top in **Search Funding Results**.
6. Name your search, check box for weekly email, click **Save**, click **OK**.

Repeat for each new search.

Step 2 *(cont.)*

B. Advanced Search
More steps, but added filters narrow the results.

1. Log in, click **Funding** in top ribbon.
2. Click **Advanced Search** under search box at center/top.
3. Under **Find Opportunities Matching**, select **Match all of the fields** (more precise results) or **Match any of the fields** (broader results).
4. Type your search term in a field box (use quotation marks for multiple words). Use **All Fields** for broad results or the drop down menu to narrow results.
5. Use filters at left in **Find Opportunities Matching** to match your search requirements. For information about each, click to open item, then click circled "**i**."
6. Use field and filters in **Exclude Opportunities Matching** to eliminate opportunities.
7. Click **Search**.

If results satisfactory, go to Step 11. To modify settings:

8. Click **Refine Search** at center/top in **Search Funding Results** box.
9. Make refinements, click **Search**.

If results satisfactory, go to Step 11. To narrow results:

10. Use filters in left column.

To save:

11. Click **Save Search** at center/top in **Search Funding Results**.
12. Name your search, check box for weekly email, click **Save**, click **OK**.

Repeat for each new search.

Further Information: See Pivot website for tutorials, descriptions and FAQs. For web assistance, click Help or Help/Support on any page. For Pivot phone assistance, call 775-327-4105. For a personal Pivot tutorial, call Pam Jahnke, Center Grants Coordinator/Junior Faculty Outreach (Dean of Research Office) at 650-724-0195. For comments/feedback on this guide, contact Gail Easton, Research Proposal Editor (School of Engineering) at geaston@stanford.edu.

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