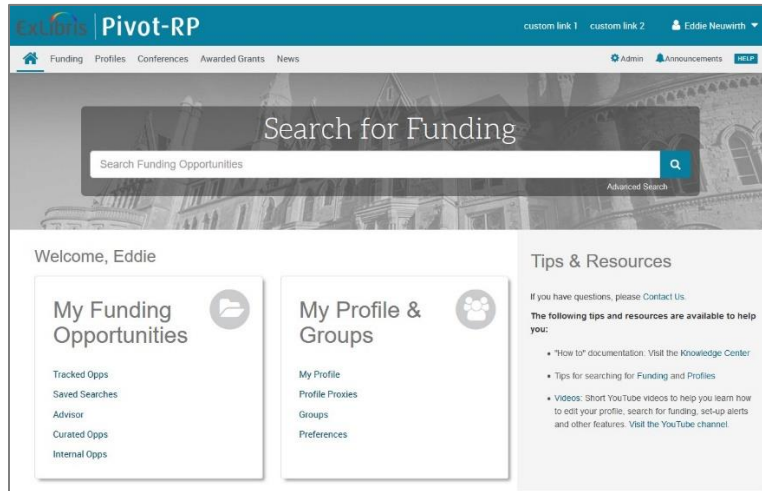


Welcome to Pivot-RP

This guide will provide you with helpful tips on how to use Pivot-RP. By creating an account, you can track funding opportunities, save searches, get automated funding alerts and claim/edit your personal profile.

To get started, go to <https://pivot.proquest.com>.



CREATING YOUR ACCOUNT

There are two ways to create an account. (1) Use your email address and create a password; or (2) use your institutional - SSO - credentials to create an account.

- Select the **Create Account** link
- Choose to sign up with a Username/password or use your existing institutional login credentials

Option 1 - Select Username/Password:

- Fill in all required fields
- Use your institutional-assigned email address (this will be your User ID)
- Create a password
- Find and Select your institution from the Institution pull-down menu
- Click the “create my account” button and Pivot-RP 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-RP right away

Note: If your confirmation email does not arrive in a short amount of time, you may want to check your email spam folder.

Option 2 - Select Use Institutional Credentials:

- Find and Select your institution from the Institution pull-down menu
- Login via our institution’s SSO page using your existing institutional login credentials
- Fill in your name and email address when prompted in Pivot-RP and select the “create my account” button to finish configuring your account

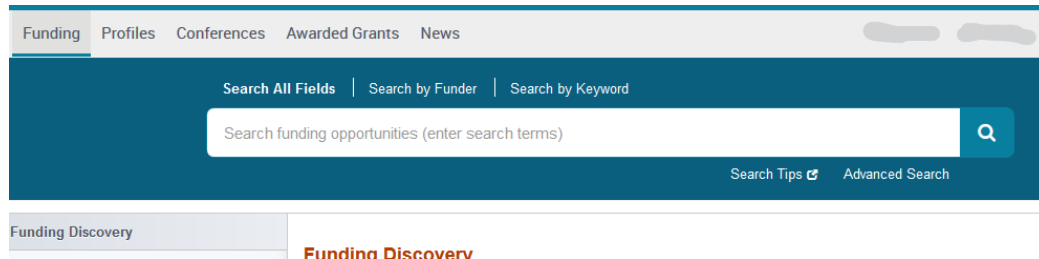
Note: Not all institutions have SSO configured. If your institution is not listed, just follow the link for creating an account with a username/password.

Searching for Funding

There are several ways to search for funding: Free Text search, Search by Funder, Keyword or Advanced Searching.

STARTING YOUR SEARCH

The best place to start a Pivot-RP search is from the **Funding tab** to see all your search options.



You can choose to search

- by entering **Free-Text search terms**
- by **Funder name**
- by **Keywords**

or

- you can browse and select keywords using the graphical **browse by keyword** wheel

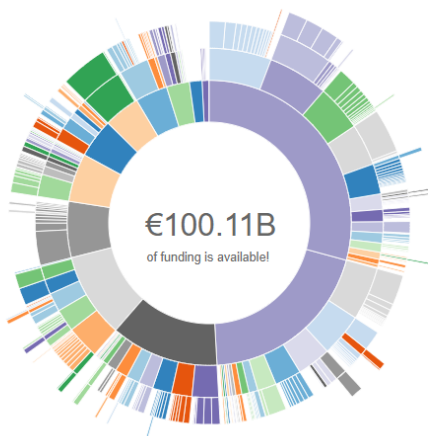
or

- choose **Advanced Search** for more precise searching and pre-filtering options

SEARCH BY KEYWORD

One way to search by keyword is to use the interactive **Browse by Keyword** wheel.

1. Hovering over different parts of the wheel will give you a sense of approximately how much funding is available by topic.
2. Find a **Keyword** that matches your research interest.
3. Click that part of the wheel to view all results in Pivot-RP currently associated with that term.



Keywords can also be found and included in searches (along with other search parameters) when using the **Advanced Search** form.

Using Advanced search will allow you to create precise searches to match your preferred criteria.


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, Funder, Funder ID, CFDA Number**).
3. Enter your search terms into the boxes. If additional rows are needed, click **Add another row**.
4. Additional fields are available for pre-filtering your search – click on any field name to expand the set of pre-filtering options.
5. Click **Search**.

Funding Advanced Search

Find Opportunities matching

Match **all** of the fields

Match **any** of the fields 

| | | | | |
|-----|------------|----------------------|----|----------------------|
| and | All Fields | <input type="text"/> | or | <input type="text"/> |
| and | All Fields | <input type="text"/> | or | <input type="text"/> |
| and | All Fields | <input type="text"/> | or | <input type="text"/> |

[+ Add another row](#)

[▶ Amount](#)

[▶ Deadlines](#)

[▶ Limited Submission](#)

[▶ Applicant/Institution Location](#)

[▶ Activity Location](#)

[▶ Citizenship](#)

[▶ Funding Type](#)

[▶ Keyword](#)

[▶ Applicant Type](#)

[▶ Funder Type](#)

[▶ Country of Funder](#)

[▶ Recently Added](#)

Helpful Hint: You can also exclude certain types of opportunities from results by entering terms and parameters in the **Exclude Opportunities** section at the bottom of the advanced search page.

Also note that your research administrator may have pre-set Applicant/Institution Location, 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.

On the advanced search form, you can choose **Funding Type** to limit to opportunities of a particular type or for a particular activity, such as postdoctoral awards or travel.

▼ Funding Type

and

Publishing or Dissemination
 Research: Project Grants & Innovation
 Scholarships, Training or Bursaries
 Tenders
 Travel

Choose **Funder Type** to limit to opportunities from a particular type of funder, such as national governments (separated out between US and Non-US), local governments, multinational organisations, private foundations, professional societies, academic institutions and commercial sector funders.

Search Results

There are two different ways to refine your search from the results page: Refine Search or Facetted 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.
2. Add or remove criteria to narrow down or broaden your original search.
3. Click Search.

Search Funding Results Your Search: (medicine)
[Advanced Search](#) [Save Search](#) [Refine Search](#)

| | | |
|---------------------------------------|------|---|
| Recently added | | <input type="checkbox"/> 5,178 Results Sort ▾ |
| Last 30 days | 887 | |
| Last 14 days | 648 | <input type="checkbox"/> AsMA Scholarships |
| Last 7 days | 74 | Aerospace Medical Association (AsMA) |
| Submission type | | <input type="checkbox"/> Dickson Prize in Medicine |
| Limited Submission | 150 | School of Medicine |
| Other internal coordination required | 16 | University of Pittsburgh |
| Deadline Certainty | | <input type="checkbox"/> Dr A.H. Heineken Prize for Medicine |
| Anticipated | 3270 | Koninklijke Nederlandse Akademie van Wetenschappen (KNAW) Royal Netherlands Academy of Arts and Sciences |
| Confirmed | 1783 | <input type="checkbox"/> Racialized Communities Leadership Grant in Family Medicine |
| Funding types | | College of Family Physicians of Canada (CFPC) College des Medecins de Famille du Canada (CMFC) |
| Research: Project Grants & Innovation | 2484 | <input type="checkbox"/> LIMITED Family Medicine Resident Awards for Scholarly Achievement |
| Scholarships, Training or Bursaries | 1305 | College of Family Physicians of Canada (CFPC) College des Medecins de Famille du Canada (CMFC) |
| Prizes and Awards | 922 | <input type="checkbox"/> Awards of Recognition - Mimi Divinsky Awards for History and Narrative in Family Medicine |
| Fellowships or Post-doctoral Awards | 782 | College of Family Physicians of Canada (CFPC) College des Medecins de Famille du Canada (CMFC) |
| Travel | 511 | |
| more... | | |
| Funder types | | |
| Private Foundation or Non-Profit | 2318 | |
| Professional Society or Association | 1403 | |
| Non-US National Government | 486 | |
| US Federal Government | 270 | |

FACETTED NAVIGATION

Facetted search navigation lets you drill down to include more specific criteria without having to go back to your original search.

1. On the left side panel of the search results page, you will find facets and filters to help you further break down your search results into specific categories based upon **Submission Type, Deadline Certainty, Funding Types, Funder Types, Applicant Type, Top Keywords and more.**

Above the facets, you may notice that your results are also filtered by country for applicant/institution location, citizenship and/or activity location. These filters are set by your Pivot-RP 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 facetted search criteria to narrow down your results. Your results list will automatically refresh after you select a facet.

Saving, Tracking and Sharing opportunities

SAVING A SEARCH

1. From the search results page, click on **Save Search** at the top of the page. (If you are not logged in, the system will prompt you to sign in.)
2. Enter a name for your saved search in the text box.
3. Indicate whether you would like to receive a weekly alert email with new or updated opportunities from this query, using the checkbox.
4. Click Save.

SAVING A FUNDING OPPORTUNITY TO A TRACKED LIST

Saving Funding Opportunities in your Pivot-RP account allows you to maintain a list or lists of opportunities you are interested in. You can save an unlimited number of opportunities and choose to get alerts on deadlines, add to personal calendars or just get updates when anything changes about the status or content of the opportunity.

There are two ways to save funding opportunities. 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

From the search results page, select which opportunities to save.

Click Track to put the opportunities on your tracked list.

3. By default, you will receive an email when there are updates to these opportunities. If you do not wish to receive an alert, de-select the email option.

4. Optional – you can enter a new tag or select from your existing tag list to help categorize the opportunity and make it easier to find on your tracked list.

5. Click Add.

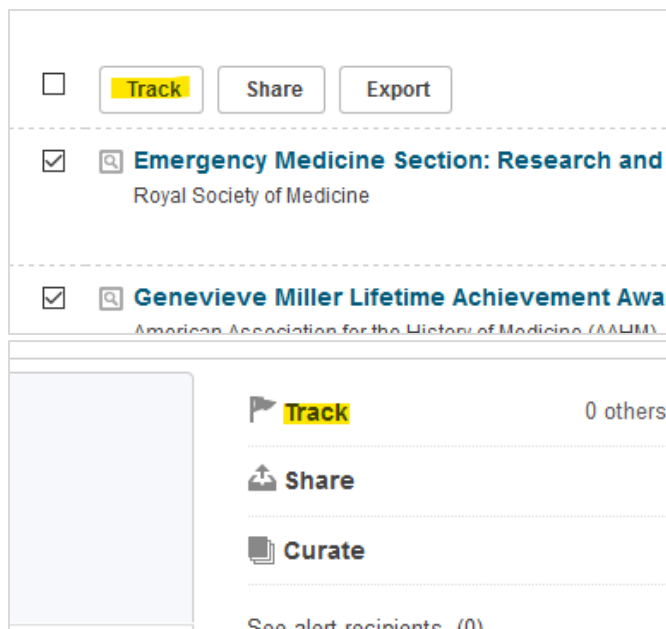
FROM AN INDIVIDUAL OPPORTUNITY

1. Click the opportunity name from the search results page to view the complete details.

2. Click Track to put the opportunity on your tracked list.

3. By default, you will receive an email when there are updates to these opportunities. If you do not wish to receive an alert, you'll need to modify your preference from your Pivot-RP home page Tracked list.

4. Optional - Enter a new tag or select from your existing tag list by clicking Add tag (which will display once you choose Track). This enables you to organize your tracked opps by topic or project.



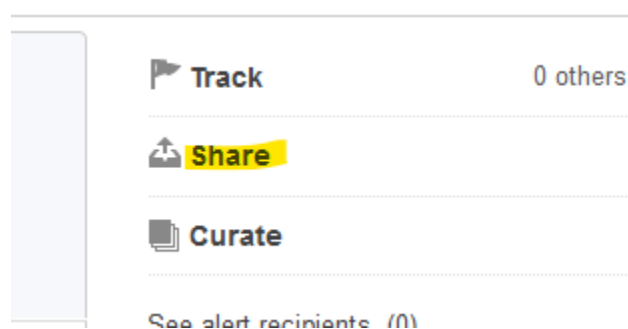
SHARING A SEARCH

1. Log in to your Pivot-RP 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, they will get an error message when trying to view the search results. Users will need to login with a Pivot-RP username and password if trying to view the results from off-campus.

SHARING A FUNDING OPPORTUNITY

You can share funding opportunities three ways: from the opportunity itself, from a funding results list or from your 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.

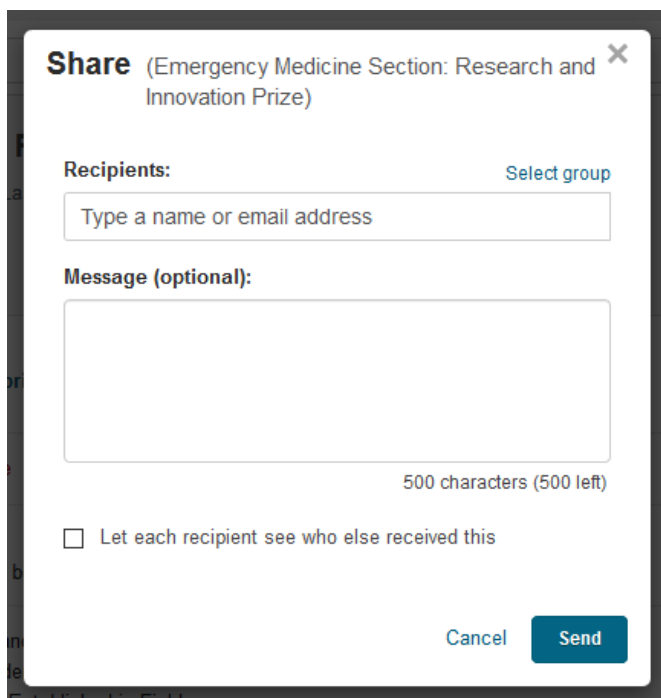
FROM A FUNDING RESULTS PAGE

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

FROM YOUR 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 opportunity with, include a message, and click Send.

Note: You can also share all of your tracked opportunities or a group of tagged opportunities. Select the opportunities 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 opportunities. If you have narrowed your view by clicking on a tag, you can share those specific opportunities.

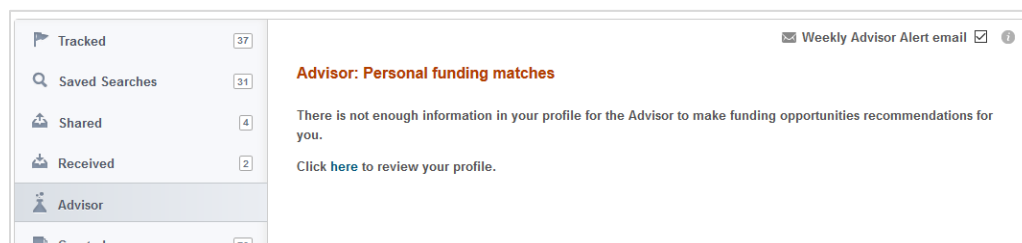


The screenshot shows a 'Share' dialog box for an opportunity titled '(Emergency Medicine Section: Research and Innovation Prize)'. The dialog has a close button (X) in the top right corner. It contains the following elements:

- Recipients:** A label followed by a 'Select group' link and a text input field with the placeholder 'Type a name or email address'.
- Message (optional):** A large text area for entering a message, with a character count '500 characters (500 left)' at the bottom right.
- Let each recipient see who else received this
- Buttons for 'Cancel' and 'Send' at the bottom right.

SETTING UP AUTOMATED FUNDING ALERTS ADVISER ALERTS

With Pivot-RP users have the option to claim or create a researcher profile in order to get automated funding recommendations and alerts. Adviser Alerts are accessible from the home menu and are also emailed to you weekly. If desired, you can opt out of emails and you will still see the recommendations in the Adviser Alerts tab on the home menu.



The screenshot shows the 'Adviser' tab selected in a navigation menu on the left. The menu items are: Tracked (37), Saved Searches (31), Shared (4), Received (2), Adviser (selected), and Curated (70). The main content area displays:

- A toggle for 'Weekly Advisor Alert email' which is currently checked.
- A heading: **Advisor: Personal funding matches**
- Text: 'There is not enough information in your profile for the Advisor to make funding opportunities recommendations for you.'
- Text: 'Click [here](#) to review your profile.'

CLAIM YOUR PROFILE

In most cases, Pivot-RP Editors will have already created a profile on your behalf. You will simply need to 'claim your profile' to begin getting automated recommendations.

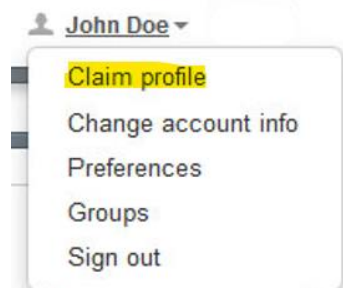
Login to Pivot-RP with your username/password

Select "My Profile" or Claim Profile under your name in the upper right

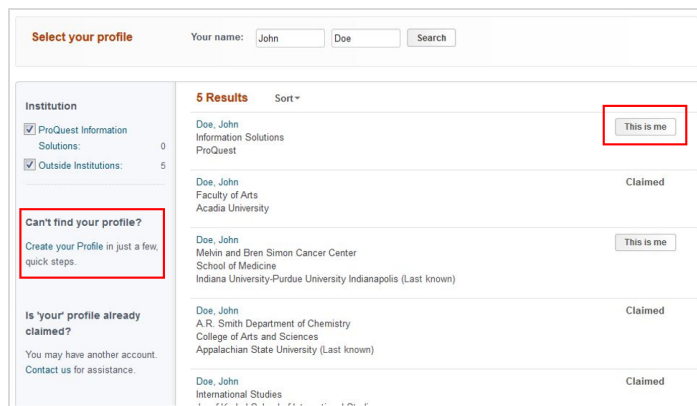
On the Select your Profile look-up page you will be prompted to review a list of existing profiles to see if one matches your identity.

If you see yourself, click This is Me

If you don't see your profile, click Create a Profile or contact our Support team for assistance



After claiming or creating a Pivot-RP profile you will begin to see Adviser Alerts recommendations on your Pivot-RP homepage and via email. Alerts are updated and sent weekly.

A screenshot of the "Select your profile" page. At the top, there is a search bar with "Your name:" followed by input fields for "John" and "Doe", and a "Search" button. Below the search bar, there is a table of results. The table has columns for "Institution", "Profile Name", and "Action". The first row shows "Doe, John" with "Information Solutions ProQuest" as the institution and a "This is me" button. The second row shows "Doe, John" with "Faculty of Arts Acadia University" as the institution and "Claimed" as the action. The third row shows "Doe, John" with "Melvin and Bren Simon Cancer Center School of Medicine Indiana University-Purdue University Indianapolis (Last known)" as the institution and a "This is me" button. The fourth row shows "Doe, John" with "A.R. Smith Department of Chemistry College of Arts and Sciences Appalachian State University (Last known)" as the institution and "Claimed" as the action. The fifth row shows "Doe, John" with "International Studies" as the institution and "Claimed" as the action. On the left side of the page, there is a sidebar with "Institution" filters, a "Can't find your profile?" section with a link to "Create your Profile in just a few quick steps", and an "Is 'your' profile already claimed?" section with a link to "Contact us for assistance".

UPDATE YOUR PROFILE TO IMPROVE FUNDING RECOMMENDATIONS

By making just a few changes to your Pivot-RP profile you can greatly improve the quality and breadth of recommendations that you receive via Adviser Alerts.

From the menu under your name, click Your Profile

On your profile page Click the blue Edit Profile button. The profile Editor will open in a new tab. Click Edit in the upper right.

The most important elements to update on your profile are your expertise statement, keywords and a link to a personal webpage or CV.



NEED ADDITIONAL SUPPORT?

Pivot-RP provides key resources and helpful, short tutorial videos

RESOURCES & GUIDES

Detailed documentation and other resources

<https://knowledge.exlibrisgroup.com/Pivot>

Pivot-RP tutorial videos can be found on YouTube:

<https://www.youtube.com/user/ProQuestPivot>

SUPPORT

If you have any questions, contact our <https://supportcase.exlibrisgroup.com/s/pivot>
