## Pivot-RP Essentials

# Setting Up Your Account and Profile

This video explains how to create a new account in Pivot-RP, and how to claim your Pivot-RP Profile.

By creating a Pivot-RP account, you'll be able to keep track of funding opportunities you're interested in, save customized searches, and get email alerts for things like approaching funding deadlines or when new funding opportunities have been added that you'll be interested in.

To create your Pivot-RP account, go to the login page and click Create account.

You can choose to use your institutional login credentials or use your email address and create a password.

Using institutional login credentials is sometimes called single sign-on, or SSO. Your institution must have already set up Pivot-RP to use SSO; if you can find your institution on the drop-down list, then this has been set up. Select your institution, and select Create my account.

Alternatively, if your institution is not listed in the drop-down menu, or if you wish to log in with your email and a password, select Use Email Address / Create Password. The email address you use must be through your institution's email domain; Pivot-RP can’t be used with a personal email address, such as Gmail, iCloud, and so on. After choosing a password, you need to indicate which institution you belong to. Read and consent to the Privacy Policy and Terms and Conditions, and select Create my account.

Pivot-RP will send you a verification email, with a link to confirm your account registration.

After setting up your account, the next time you log in to Pivot-RP, you will be prompted to claim your Pivot-RP profile. Claiming a profile is optional, but it is recommended that you do so.

Profiles are created by Pivot-RP's editorial team. By connecting your user account with a Pivot-RP profile, Pivot-RP will be able to automatically suggest funding opportunities that are targeted for your research; other Pivot-RP users will be able to find you as a potential collaborator on research projects; and you'll get relevant funding alerts by email.

You can also claim a profile later by going to the user menu in the upper-right and selecting Claim profile.

Pivot-RP will display a list of possible matching profiles, based on your account information. If you see the correct profile, select This is me in the profile row. If the email address on the profile you are claiming matches the email address on your Pivot-RP user account, Pivot sends a confirmation email with a verification link.

If you see multiple profiles or have difficulty claiming an existing profile, follow the onscreen prompts for assistance.

If you can't find any Pivot-RP profiles that match you, you can create your own profile by clicking Create your profile. Follow the on-screen steps, including things like entering any different names you have published under, details about your publications, and so on.

Once you have claimed your profile, you can edit your profile at any time. Open the Profiles tab and click Your Profile. Or, from the Home dashboard page, click My Profile. Details about updating your profile can be found in other training sessions.

And that's how to set up your account and your profile in Pivot-RP!