## Pivot-RP Essentials

# Managing Funding Opportunities in Pivot-RP

This video explains how to manage funding opportunities in Pivot-RP. On the home dashboard page, under My Funding Opportunities, you will find links to your Tracked Opportunities, Saved Searches and any opportunities curated by your Pivot-RP administrators. The dropdown menu under the home icon also provides easy access to the features we’ll discuss in this video to help you manage funding opportunities.

Tracked opportunities are a way of saving and tracking individual funding opportunities of interest to you. Pivot-RP will automatically alert you if there are any changes to an opportunity you are tracking such as a new deadline status or updated eligibility requirements.

There are a few different ways to *add* an opportunity to this list, and those ways are discussed in other training sessions.

By default, this list is sorted by deadline, with the earliest deadline first. That way, you can see which opportunities need to be dealt with sooner than the others. Alternatively, you can sort alphabetically by Title.

If there are many opportunities on your Tracked list, you can use the filters on the lower left to only show opportunities that fall into certain categories. If you have added tags to your opportunities, you can also filter by those tags.

On the right side of each opportunity is the Options dropdown menu, with several tools. In addition to the usual options, such as sharing, tagging, and so on, you can add the deadlines for this opportunity to an external calendar, such as Google Calendar, iCal, Outlook, and more. You can turn off or turn on an Alert email to notify you any time this opportunity is updated by either the sponsor or the Pivot-RP editorial team. You can add a deadline reminder for yourself. Choose the amount of time, from one week to up to four months before the deadline that you would like the reminder, and whether you would like it by Pivot-RP Announcement or by email.

You can see with whom you have shared this opportunity. And you can see how many other people have added this opportunity to their Tracked list.

Next, let’s look at Saved Searches. As we’ve discussed in other training sessions, these allow you to easily repeat a search without selecting all the search parameters again. To run a saved search, click the title. These columns show how many new opportunities have been added to this search in the last week, how many total opportunities result from this search now, and whether email alerts are on. The Options drop-down menu includes several tools, allowing you to share the search, add tags to organize your searches, and view archived results from previous weekly updates.

Click the Shared tab to see all the opportunities you've shared with other researchers, and whether they have chosen to track or dismiss them. Click the number of shares to see with whom you've shared this opportunity, and what action each person has taken.

Meanwhile, when your sharing recipient logs in to Pivot-RP, they will see the opportunity on their Received list. Opportunities don't need to stay here. The recipient can check the box next to each opportunity to add it to their Tracked list or to Dismiss and Remove it.

The Advisor is a powerful tool for Pivot-RP to find opportunities *for* you based on your Pivot-RP profile. Profiles are discussed in another training session. Once you have claimed a profile, the Pivot-RP Advisor will start recommending opportunities that match that profile. You can choose to get a weekly email from Pivot-RP whenever the Advisor system finds more opportunities that match your profile.

Curated lists and Curated Searches are those that your institution's Pivot-RP administrators are sharing with *all* researchers at your institution. There may be several different curated lists or searches to choose from; and, as usual, you can select opportunities to add to your personal Tracked list, or even to Share with a researcher outside your institution.

When viewing a Curated search, in the upper right, you will see an option to ‘view as a search result’. This will give you the option to further refine or sort the results using facets and filters. You can also add the search to your own saved searches which will allow you to get weekly email alerts for new opportunities that match the query.

Finally, *Internal* opportunities are those created by your institution’s Pivot-RP administrators and feature funding sources that are only available to researchers at your institution.

And those are some ways you can manage your Pivot-RP funding opportunities!