## Pivot-RP Essentials

# Discovering Profiles

This video explains how to use the Profile Discovery tool in Pivot-RP to search for potential collaborators at your institution and beyond. Profiles include biographical information about researchers, as well as publications and awarded grants, and links to recommended funding opportunities.

In Pivot-RP, open the Profiles page. Your Profile is where you can view your own profile, or claim your Profile if you haven't already. Profiles are created by Pivot-RP editorial staff, but they can and should be edited to ensure accuracy. We discuss claiming and editing a profile in more detail in another training session, but know that you can access your Profile here, as well as add a proxy so that another person can manage your profile on your behalf.

In this session, we'll cover the search and navigation features of the Profile Discovery tool, which is how you can explore other people's profiles. Here, you can search for profiles, or browse profiles based on your institution’s organizational hierarchy, which we will discuss in a minute.

To begin, let's use the basic search box to find profiles of researchers we might be interested in collaborating with. You can enter anything here: a first name or a last name, a topic, or an institution. If you include more than one word, Pivot-RP will perform a Boolean AND search and find Profiles with both words. You could also conduct a Boolean OR search, if you're not sure which word will give you the results you need. Words within quotation marks will only find profiles that contain that exact phrase. Punctuation marks, such as commas, periods, and so on, should not be used, except for quotation marks for phrase searching, and the asterisk, which is a wildcard for any number of letters.

Use the Advanced Search to make a more refined search. This allows you to indicate in which fields to search, and to pre-filter for particular academic degrees, roles, and so on.

On the results page, profiles are initially sorted by relevance, although you can choose to sort alphabetically by last name. On the left side are filters you can use to narrow your results. You can see Profiles within your institution or in other institutions. You can filter by various disciplines and sub-disciplines that Pivot-RP editors assign to researchers' Profiles. Scroll down, and you can filter by Role and by Department Name.

Once you find the Profiles in which you're interested, select them and then you can add them to a group, either an existing group or a new group you create now. Groups are discussed in other training sessions.

Back on the Profile Discovery page, you can see Profiles of researchers at your institution, organized into different departments and sub-departments. From here, you can browse through their Profiles to find researchers with whom you want to share funding opportunities, or work together on research projects.

Once you're on a Profile page, in addition to seeing publications, grants, and so on, on the right side you can see how many funding opportunities match this person's profile, as well as how many match this person's department. Selecting these links will display the recommended funding opportunities.

Those are some of the ways to use the Profile Discovery tool in Pivot-RP.