## Pivot-RP Essentials

# Updating Your Profile

This video explains how to update your Pivot-RP profile. Your profile can contain biographical information about your role, affiliations and research interests, as well as publications, grants and patent information.

Update your profile in order to get increased funding matches targeted to you, get discovered as a potential collaborator, and get relevant funding alerts directly to your inbox.

Access your profile from the home dashboard page, or from the Profiles tab, where it says Your profile. Note that new users will see Claim Your Profile; once you claim your profile you can then edit it.

In most cases the Pivot-RP editorial team will have pre-populated your profile with biographical information found on your institution's public web pages.

In addition, Pivot-RP automatically links citations and grants to your profile. It uses multiple data sources and a sophisticated algorithm, but there can be errors. It is highly recommended that you take a few minutes to review and update your profile so that it is accurate and current.

To allow someone else to update your profile on your behalf, click on Add a Proxy and you can designate one or more Pivot-RP users who can manage your profile.

Click on Edit Profile and you will see this note that a new browser window will open for you to edit your profile. Click Continue.

This is the Overview page.

The most important elements of your profile are:

- adding middle names and alternate names used for publication

- adding links to sites such as your personal webpage or CV page

- and adding keywords about your research interests

These will help you get the most relevant funding advisor alerts and recommendations, and will optimize Pivot-RP's automated citation linking to your publications.

Click the pencil icon next to your name to add middle names or alternate names you use for publishing.

You can populate the Links section with sites such as your personal webpage or CV page. Click Add.

Add a link or a file, I'm going to add a link. Enter the URL and indicate if the site is your personal webpage, publications page, and/or your CV containing your professional achievements.

Adding your ORCID ID will help to automatically add your publications to your profile and keep it updated.

If you don't have a researcher identifier but are interested in learning more, you can click the link to visit orcid.org for information and registration.

Continue updating your profile with a description of your expertise, your affiliations, education and keywords.

Keywords are based on a controlled vocabulary, maintained by Pivot-RP editors who carefully map keywords to each funding opportunity in the database.

There are two ways to quickly add keywords to your profile. Just enter terms and Pivot-RP will display matching terms in its keyword hierarchy.

Select a term to add it to your profile. Or, you can browse through the hierarchy and select a term of interest.

There is no limit to the number of keywords you can add to your profile. The more keywords you add the more funding recommendations you are likely to receive. Remember to click Save after adding keywords.

The last biographical items are Languages, Associations, and Honors.

You can now move over to the Publications, Grants, or Patents areas to continue updating your profile.

The biographical updates you just made will be saved.

The Done button at the top of the screen is for when you are done updating all areas of your profile.

Let's look at publications.

From time to time, your profile may show some ‘suggested publications’. These are publications which our algorithm thinks belong to you, but you will need to review and verify them on the Suggested tab, which we will see in a moment.

If you currently do not see any publications listed, or just one or two, we highly recommend adding a few manually.

It will help the publication matching algorithm, and it will also help improve funding advisor recommendations.

Pivot-RP offers two options, you can add publications one at a time, or batch upload citations from a file.

Add one at a time by using this form. By just entering a title, Pivot-RP will automatically search for the content.

If you see your publication, just click on the title and Pivot-RP will auto-populate the form.

Check that the information is correct, and click Add.

Add multiple publications at once by uploading a file in RIS or BibTeX format, two popular formats from bibliographic management tools such as RefWorks and EndNote, or export from Google Scholar.

Publications added through the batch upload process will display on the Suggested tab.

To see the Suggested tab, and to manage all publications that have been added to your profile, click Edit.

It is important to check the Suggested tab for automated matches that may or may not be correct.

Use the icons next to each title to show a publication on your profile, hide it, or remove it because it's a duplicate.

Use the Trash button to tell Pivot-RP the publication is not yours.

Now, let’s look at Grants. When you add a grant, entering the sponsor and the award ID will often times enable Pivot-RP to find the grant and autopopulate the rest of the information.

Lastly, enter your patents by clicking Add and filling out the form.

When you are finished updating your profile and you click Done, updates take effect immediately. Your browser should refresh the profile page and you will see any changes or additions made.

And that is how to update your profile in Pivot-RP.