## Pivot-RP Essentials

# Groups

This video explains how to create and manage User Groups in Pivot-RP.

Groups are used to facilitate sharing of information among users with similar interests. Groups can be used to share funding opportunities, newsletters, and so on. There are two types of user groups: A Personal Group can be created by any Pivot-RP user, and only the creator can add people to the personal group. A Public Group can only be created by a Pivot-RP administrator, but it is visible to all users, and anyone can choose to join the group.

Groups can be accessed from the home dashboard page, in the My Profile and Groups section, or from the user menu in the upper-right corner. We'll talk about creating your own Personal Group in a few minutes; below that, you can see all the Public Groups that Pivot-RP administrators at your institution have created. Simply click "join group" when you find one of interest. From then on, whenever opportunities are shared by the group administrator, you'll receive an email containing the shared opportunities. You'll also be able to see the opportunities here in your Received tab. If the group administrator creates and sends a Newsletter to that group, you'll receive the Newsletter as an email.

Any Pivot-RP user can create their own personal group. From the Manage Groups page, in the Personal groups section, click "New group." Give the group a name and a description -- which could be an explanation of what the group is for -- and then add people to the group. As you type names, matching profiles at your institution will appear, and you can click to add them. Or you can add people by entering their email addresses. You can even add email addresses of people who aren't members of your institution; but if they don’t have access to Pivot-RP, they will only see brief information about any opportunities you share.

After you Submit the group, it will appear on your list of personal groups. From there, you can manage the group as needed. Only you can add and remove members from a personal group you have created, and only you can use it.

You can also add people to a group by selecting them from a list of Profiles you've searched for, and then clicking Add to Group.

Once groups are created, they can speed up the process of sharing Pivot-RP information. Any time you want to share some opportunities, instead of typing individual names or email addresses, you can click "Select group" and choose one of your groups.

As mentioned earlier, if you are a Pivot-RP administrator at your institution, you can be given the ability create a Public Group. From the Manage Groups page, in the Public groups section, click "New group." Fill out the "Add a Group" popup just like when creating a Personal Group, although you'll see the checkbox to "Make group public." Also, unlike a Personal Group, you don't have to add people to the group; users at your institution will be able to see the group and join if they want to.

The Pivot-RP administrator who creates a Public Group is the owner of that group. And the owner can assign any members of the group to become group administrators, by selecting "make group admin" from the member list. Group administrators can add and remove members and can share opportunities and searches with the rest of the group, using the same procedure as when sharing with a personal group.

You can share opportunities to any public group for which you are a group administrator, just like with personal groups.

Besides sharing opportunities with a group, newsletters can be shared. As we discussed in other training sessions, Pivot-RP administrators can create and send Newsletters to Pivot-RP users at your institution. When creating a Newsletter, in Step 4, you can choose to send the Newsletter to any group for which you are the group administrator.

Those are some of the ways to use groups in Pivot-RP!