## Pivot-RP Admin Essentials

# Features and Tools for Pivot-RP Administrators

This video explains some of the features and tools Pivot-RP administrators at your institution can use to help researchers discover funding opportunities.

Not all Pivot-RP administrators will have access to all of the features and tools we discuss here.

If you like a particular tool but don’t seem to have access to it, you can request appropriate user privileges from one of your institution’s primary Pivot-RP administrators.

One of the most powerful administrator features in Pivot-RP is the ability to create a Curated list. This is a list of funding opportunities that can be shared with Pivot-RP researchers at your institution. To create a curated list of opportunities -- for example, after conducting a search -- select the opportunities you want and then click Curate. If you already created a curated list, select the box to add these opportunities to that list; or click Create New List and enter a new name.

The selected opportunities will be added to this curated list. To see the list, hover over the home icon to show the drop-down menu. Choose Curated Opps. On the left side, you can see My Curated Lists. Select a list to see the opportunities it contains.

This curated list won't be visible to users at your institution until you check the Display box. Once you do, your list will show up on everyone's Curated tab. Also, you can click here to get a stable URL that you can embed other places -- such as webpages, emails, and so on, even if you haven't checked the Display box.

A curated list is static: You have to manually add or remove opportunities from the list, although Pivot-RP won't display expired opportunities after their deadlines have passed.

Another way to share opportunities is to curate a saved search. Starting with a saved search, use the Options menu to Publish as Curated Search. Similar to the Curated Lists, these can also be found on the Curated Opps page, on the side under My Curated Searches. Like a curated list, a curated search also provides a stable URL that you can embed anywhere. Unlike the static Curated List, the Curated Search is dynamic: users will see all of the current results in Pivot-RP matching your saved query. It will produce different results when funding opportunities are added to -- or removed from -- Pivot-RP. And if you make changes to the parameters of the saved search, the next time someone uses the URL, they'll see results based on those new parameters.

All Pivot-RP researchers can see funding opportunities they have shared with each other by looking at the Shared tab. However, Pivot-RP administrators at your institution can also see some statistics, such as which groups of people you've shared with, and what kind of actions they've taken with opportunities you shared.

Pivot-RP administrators also have another tool they can use when sharing opportunities: Instead of waiting for researchers to either track or dismiss the shared opportunity, the administrator can add opportunities directly onto researchers' tracked lists, by checking a box on the Share pop-up.

At the bottom of an opportunity, Pivot-RP administrators can add deadlines and notes that all researchers at their institution will see when looking at this particular opportunity. This could be used, for instance, to set an internal deadline so the research office has time to prepare materials; or to notify users about some other pertinent information regarding this funding opportunity.

These Notes are for a particular opportunity. But some Pivot-RP administrators at your institution will be able to add a note to all opportunities. From the Admin Dashboard, choose Global Messages. Here you can see and edit the note that is placed at the bottom of all opportunities, when viewed by researchers at your institution. There is also an option to add notes that will display only on Limited Submission opportunities. These notes allow you to explain any internal procedures or processes your institution might have for such opportunities.

Back on the Admin Dashboard, you may see more administrative tools -- again, this depends on the permissions you've been given. Additional advanced administration tools used to configure and customize Pivot-RP for your institution will be discussed in a separate training session.

And those are some of the features and tools Pivot-RP administrators can use to help researchers at your institution!