## Pivot-RP Admin Essentials

# Advanced Features and Tools for Pivot-RP Administrators

In a previous training session, we discussed some basic features and tools that Pivot-RP administrators may have access to. In this session, we'll cover more advanced tools that may apply only to a few of your institution's Pivot-RP administrators. Most of these are found on the Admin Dashboard.

Open the Admin Dashboard from the menu bar at the top of the screen. Probably the most important tool that your primary Pivot-RP administrators will use is creating other administrators and setting their privileges. On the Pivot-RP Admin Accounts page, you can see your institution's Pivot-RP administrators. Click edit/view details, and you'll see the admin privileges this administrator has. All administrators have the Basic Admin Account Features, which include the ability to add saved searches and opportunities directly to researchers' tracked lists, view who is tracking or getting alerts for specific opportunities, and more. To assign more administrative privileges, check the boxes on the right side. For example, you can give an administrator the ability to add internal deadlines or to manage profiles. We'll discuss these tools and more in the rest of this session.

Some Pivot-RP administrators can manage your institution's User Accounts. Tools here range from creating a new account, to sending a reset-password email. If you have the correct privilege setting, you can make a user an administrator from here. Notice here the link to Claim a profile. Profiles are discussed in another training session, where we discuss what profiles are for and how users can claim their own profile. However, Pivot-RP Administrators can Claim a profile for someone else with this link. On the Claim page, Pivot-RP will present profiles that could match that user, based on their name. You can assist the matching by searching for alternate names, if they use any. Then, when you find the right one, click Claim this profile.

You can Add your institution’s Internal Funding Opportunities to Pivot-RP, so that they can be discoverable just like external funding opportunities. Give it a title, funding amount, any eligibility requirements, abstract or description, and set deadlines. To add a deadline, select recurrence type One off or award terminated. Click Add Deadline. Select the date. Select the Type, which states what is expected by that deadline. Click Add. Adding Keywords will impact the discoverability of the opportunity and to whom it is recommended. If you're going to continue to work on it later, click Save Draft. When you are ready for it to be visible in Pivot-RP, select Make internal funding opp actively published. Then, click Publish. Only members of your institution will be able to see this opportunity. Internal opportunities are indicated as such in search results, recommendations, and alerts. They can all be viewed in the Internal Opps section.

You can give your users a shortcut to search Pivot-RP by embedding a Pivot-RP search box on any web page for your institution. This is called a Pivot-RP Funding Search Widget, and you have several options for customizing it. Once the Preview looks the way you want it, click Create Widget. Then, copy the code onto a web page at your institution, such as the home page of the research office or a departmental web page.

From the Search Settings tool, you can pre-filter your users' searches based on certain eligibility criteria. We recommend that you set Applicant/Institution Location to ensure that your users are seeing only opportunities for which someone from your region is eligible to apply. Click Edit. Then choose one or more countries or regions. Click more locations to see how the regions are organized in a hierarchy. If you choose United Kingdom, for example, and check Include sub-entities, this will include opportunities for the United Kingdom as well as England, Wales, Scotland, etc. If you check Include super-entities, this will also include opportunities relevant for geo-political groupings for which the UK can participate. Check the box for Include unrestricted for opportunities that are available for any location. Click Save. This will limit your users’ search results to funding opportunities that are relevant to the location of your institution.

You can also filter by Activity Location, which is where the research must take place, and/or Citizenship which is the nationality of the researcher. However, all of these are just default settings; Pivot-RP users can deselect these filters whenever they want to conduct a wider search.

Statistics are information on the publications and grants associated with profiles for your institution. You can see an Overview, or specifically look at Publications or Grants. From an individual chart, you can print or download the data. Some pages also allow you to drill down into sub-organizations within your institution. Finally, there are many types of Reports that Pivot-RP administrators have access to, and we'll cover them in another training session.

Those are some of the Advanced Features and Tools for Pivot-RP Administrators!