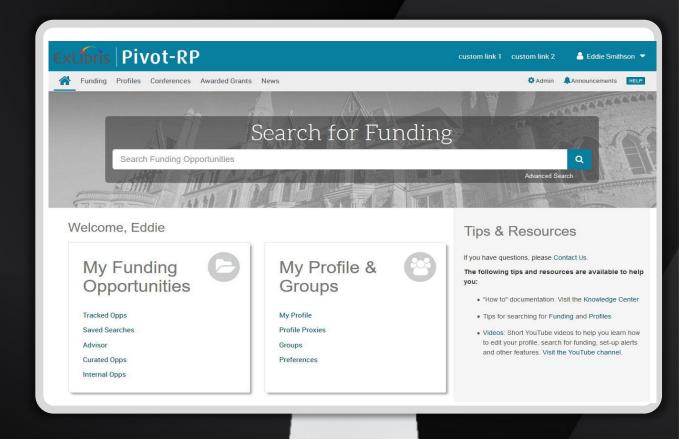


Pivot-RP Update

November Release Webinar



Agenda

- Recent Enhancements
- New funders added to the Awarded Grants database
- What's New in November
 - Multiple ownership of newsletters, internal opportunities & embedded searches
- Roadmap Preview for 2024
- Important Announcements and Resources
 - Research Professional News Webinar
 - InCites B&A Integration
 - Upcoming SSO Migration Project
- Q&A



Dedicated Product Management and Client Services Team



Eddie Neuwirth

Sr. Director of Product Management

Eddie.Neuwirth@clarivate.com



Lotte Krause

Senior Product Manager

Lotte.Krause@clarivate.com



Sofia Richards

Client Services Team Leader

sofia.vilja-richards@clarivate.com

We want to hear from you

https://supportcase.proquest.com/s/pivot

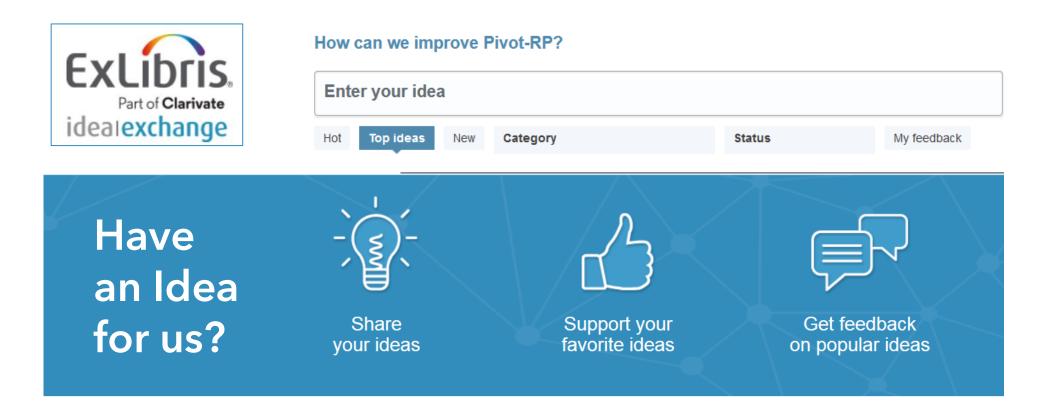
Expanded Customer Success and Training Org



https://knowledge.exlibrisgroup.com/Pivot



Most enhancements driven by customer requests



Welcome to Ex Libris Idea Exchange! **We'd love to hear your ideas for us.** To suggest an idea, please select one of the following forums

https://ideas.exlibrisgroup.com/forums/911902-pivot



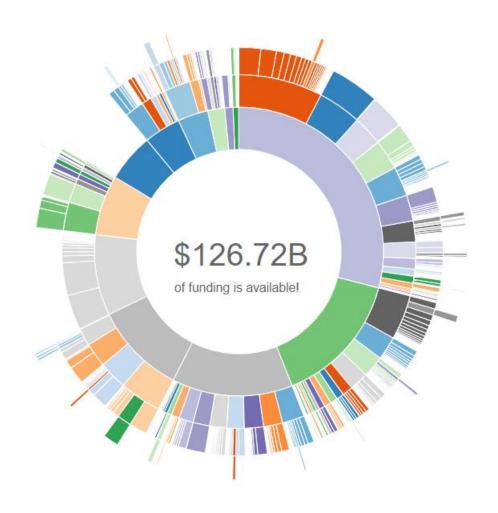
If you have any questions about this release or need assistance, please contact our Support team

https://support.proquest.com/s/pivot?

Our Support Email link changed in 2023. Make sure to use the link above and update any bookmarks or follow the blue "Help" link or "contact us" options within Pivot-RP.



Pivot-RP by the Numbers



- 33,000+ Active Opportunities
- 22,000+ published funders of which 9,800+ have currently got published opportunities
- 5,500+ of the currently published opportunities were newly added since January
- 683 new funders added YTD
- 31,500+ currently published opportunities have been updated YTD



Over 7,525,000 weekly email alerts sent YTD

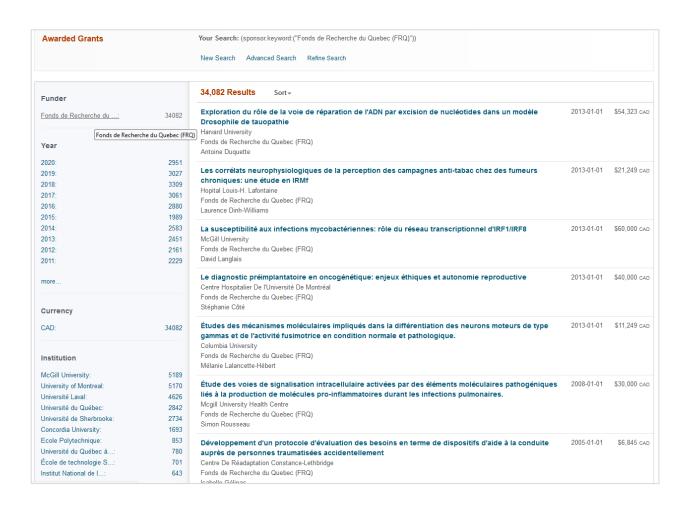


Recent Enhancements



New Funders added to Awarded Grants database

- 19 new funders to the Awarded Grants database YTD
- 5 new funders added since early September 2023:
 - Horizon Europe Research Infrastructures
 - H2020 Industrial Leadership
 - National Oceanic and Atmospheric Administration (NOAA)
 - Fonds de Recherche du Quebec (FRQ)
 - Industrial Strategy Challenge Fund (ICSF)
- We now have the awarded grants of 68 major funders in our database





Expanded Career Stage Filtering

Advisor Alerts

Enable Career Stage preferences for Advisor Alerts to get the most relevant profile-based recommendations.

Set the career stage filter through the 'My Preferences' Notifications tab -> Alert Preferences.





De	eadline Notification Preferences						
Wh	nen I add opps to Tracked , send deadline reminder via	:	☐ Announcements	☐ My Email	2 weeks 💙	before a deadline	
ΑI	lert Preferences						
0	Advisor Alert:	✓ Enabled					
0	Filter Advisor Alert by Career Stage: For more relevant recommendations, you may wish to opportunities with the selected career stages will be in weekly Advisor Alerts.						
	 Early Career and Emerging 	in Field					
	☐ Graduate Student or Pre-do	С					
	☐ Mid-Career to Established in	n Field					
	 Undergraduate Student 						
	☐ Not Applicable						
	Other Options to Modify Your Personal Recomm	nendations:					
	Keywords: Recommendations are heavily influenced by the key	eywords on your profile. Yo	ou can visit your Profile pa	age and select 'Edit Pr	ofile' to add or mo	dify keywords.	
	Filters: On the Advisor Alert page you can select filters on filter preferences will automatically be saved and y always de-select filters to expand your results.	•					



Funding Results

You can also conduct a simple search and narrow down your result set by using the career stage filter in the faceted navigation side-bar.



Search Funding Results

Your Search: (keyword:(Environmental Science) OR keyword_parent:(Environmental Science))

Advanced Search Save Search Refine Search

Share Search

Recently added						С	Calendar View +	
Last 30 days Last 14 days	49 43	1,995 Results	Sort by	Relevance	•	Deadline	Amount	
Last 7 days Submission type Limited Submission	28	UK Overseas Territories fund Ellerman Foundation, John				19 Sep 2023 Application Anticipated	£150,000 GBP	
Other internal coordination required Deadline Certainty	4	4						
Anticipated Confirmed Funding types	673	Bullitt Environmental Fellowship Bullitt Foundation	01 Apr 2024 Application Anticipated	\$100,000 usp				
Research: Project Grants & Innovation Institutional, Program or Curriculum Devel Prizes and Awards Scholarships, Training or Bursaries	1031 . 374 1 250 230	□ Environmental protection fund Region Skånes miljövårdsfond Region Skåne					see record	
Fellowships or Post-doctoral Awards more Funder types	173	Return to science grant Society of Environmental Toxicology and Chemist	Continuous Application Confirmed	€1,500 EUR				
Private Foundation or Non-Profit Non-US National Government Professional Society or Association Multinational Organization	846 354 320 148	Principal Judge RJ Bollard Lifetime Commemorative Award Resource Management Law Association of New Zealand Inc. (RMLA)					see record	
Commercial or Private Sector Applicant types Non-profit	113	Career Stages Early Career and Emerging in Fiel	d	1152	nagement and Environmental	05 Feb 2024 Application Anticipated	see record	
Academic Institution Government or Public Sector Commercial or Private Sector Early Career and Emerging in Field	550 470 321	Mid-Career to Established in Field Graduate Student or Pre-doc Not Applicable		1026 601 540		01 Nov 2023 Application Confirmed	\$7,500 usp	
more Career Stages		Undergraduate Student		131		30 Apr 2024 Application Anticipated	€29,250 EUR	
Early Career and Emerging in Field Mid-Career to Established in Field Graduate Student or Pre-doc Not Applicable	1152 1026 601 540	Baltic Sea award Baltic Sea Fund				24 Feb 2024 Nomination Anticipated	see record	
ndergraduate Student 131 The Clara Carter Higgins Summer Environmental Studies Scholarship Garden Club of America (GCA)						05 Feb 2024 Application	\$3,000 usp	



Advanced Search

For better clarity Career Stage is now a separate filter from applicant type.

Select one or more career stages on the Advanced Search form to include or exclude opportunities that are relevant to researchers by different career stages:



Note: Advanced Searches that now include both Career Stage AND Applicant Type may return much fewer results than expected. A partial workaround is to exclude applicant types not desired.



Bi-weekly Newsletter Scheduling

Schedule your Newsletters to go out every two weeks

Users now have the flexibility to schedule newsletters **weekly**, **bi-weekly and monthly**, providing more options for administrators to automate and schedule.

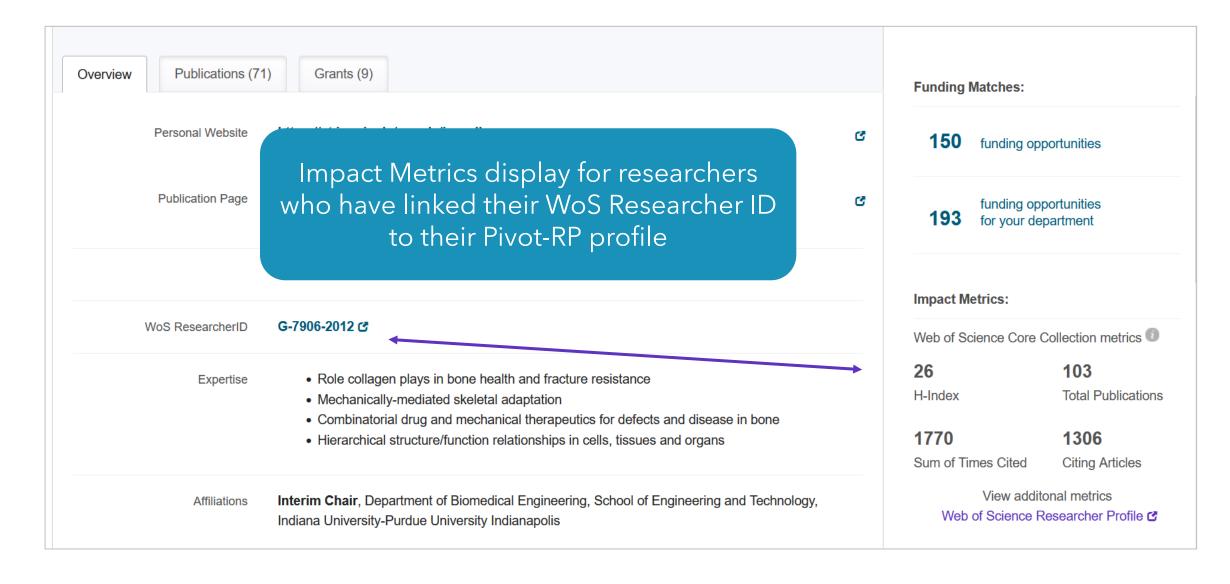
idealexchange

Step 5: Schedule Your Message



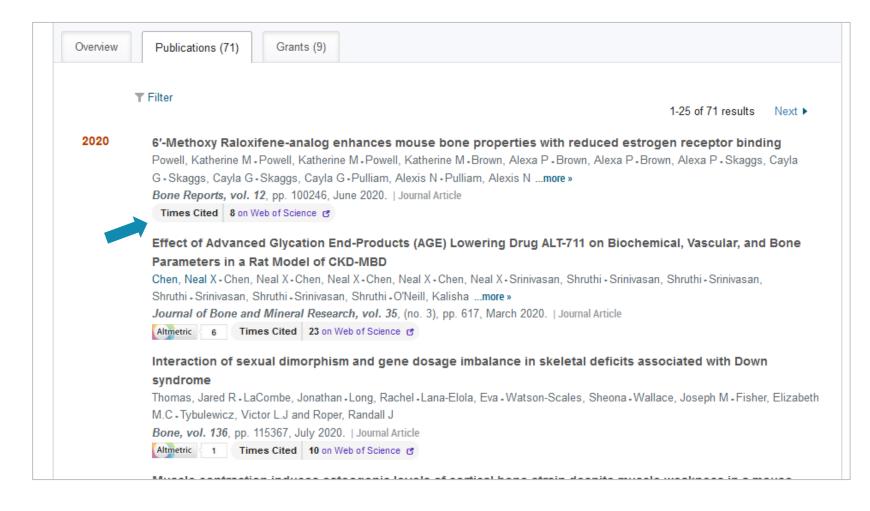


Display Web of Science Impact Metrics on Profiles





Web of Science Times Cited Counts



Pivot-RP profiles now display **Times Cited counts** for publications on researcher profiles

Understand citation activity based on data from the Web of Science core collection, the world's most trusted, publisher neutral citation database

*Times Cited will display for items with a DOI



What's New

Coming Soon



Ability to Share Admin Ownership

#1 idea exchange

Among the top requested enhancements in the idea exchange has been the ability for multiple administrators to share the ownership of specific items in Pivot-RP.

Requests for multiple ownership across objects:

Curated Lists

Curated Searches

In Progress

- Newsletters
- Internal Funding Opportunities
- Embedded Searches

November 14

52 votes

Please allow administrators to share permissions with other administrators to add to their already existing curated lists.

Please allow administrators to share permissions with other administrators to add to their already existing curated lists. I work with a team of three and each of us are administrators who would like to not only curate our own lists, but have permissions to let other administrators add to or make changes to these lists when necessary. I understand that others that are "users" can see curated lists with no editing rights, but we really want to be able to have other administrators add to our curated lists so this is a "team effort" in curating the best lists for... more

2 comments - Administrative Tools

26 votes

Allow multiple administrators of newsletter

Allow for a newsletter to be accessed from multiple admin accounts

Vote

1 comment · Other

16 votes

Multiple Editing/Management Rights for Internal Grants

Right now, only the person who added an internal grant can delete or edit that opportunity. Anyone else with full administrative rights in Pivot cannot manage the internal grant opportunities added by others. This creates a problem when that person leaves the job that bore the responsibility of adding those internal grants, thus requiring that all those opportunities must be deleted and added to another administrative account. It would be a great help to allow anyone with full administrative rights the ability to manage all internal grants.

0 comments · Administrative Tools



What's New - November 2023

Release Date: 14 November 2023

The first items to have multiple ownership enabled are:

- Newsletters
- Internal Funding Opportunities
- Embedded Searches

idealexchange

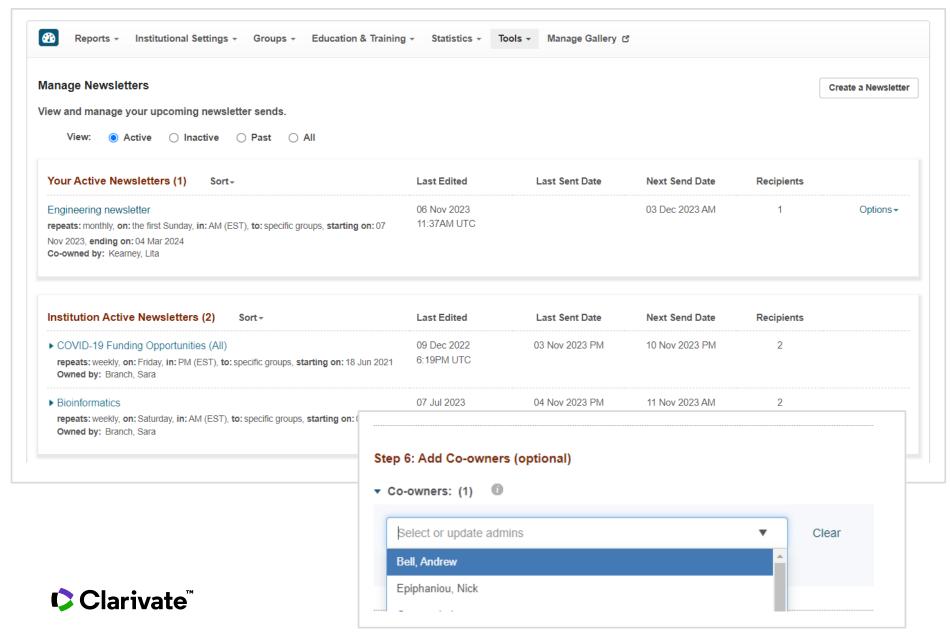
Allow multiple administrators of newsletter 26 Allow for a newsletter to be accessed from multiple admin accounts votes ✓ Complete Vote 1 comment · Other Multiple Editing/Management Rights for Internal Grants 16 Right now, only the person who added an internal grant can delete or edit that opportunity. Anyone else with full administrative rights in Pivot cannot manage the internal grant Vote opportunities added by others. This creates a problem when that person leaves the job that bore the responsibility of adding those internal grants, thus requiring that all those opportunities must be deleted and added to another administrative account. It would be a great help to allow anyone with full administrative rights the ability to manage all internal grants. 0 comments · Administrative Tools ✓ Complete

+ Embedded Searches





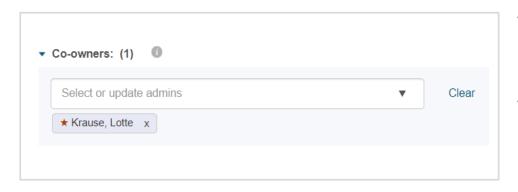
Multiple Ownership of Newsletters



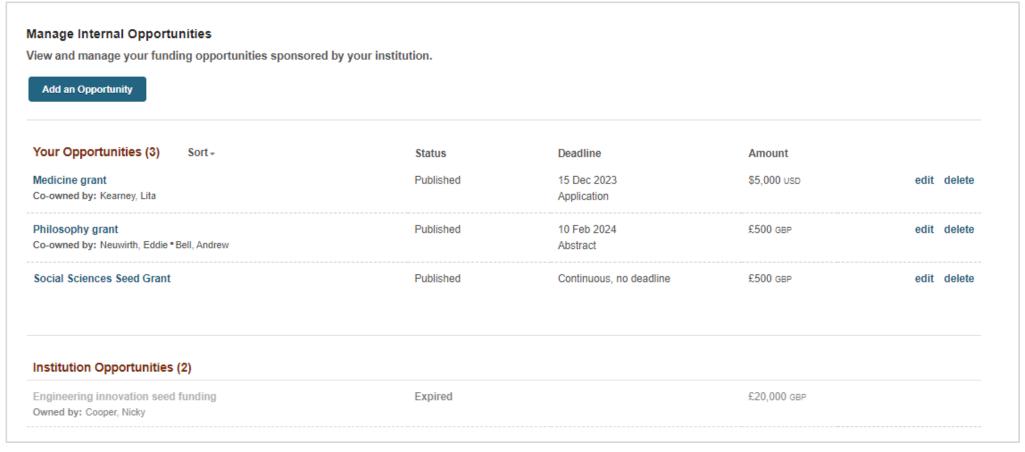
You can now add more than one owner to a newsletter:

- When creating a newsletter, you can select colleagues who can co-own the newsletter (from a list of all admins with 'manage newsletters' privileges)
- Redesigned manage newsletters page offers visibility to your active newsletters as well as active newsletters for your institution.
- Easily see who owns or coowns newsletters
- Radio button toggle at the top of the page provides a view of inactive, past and all newsletters

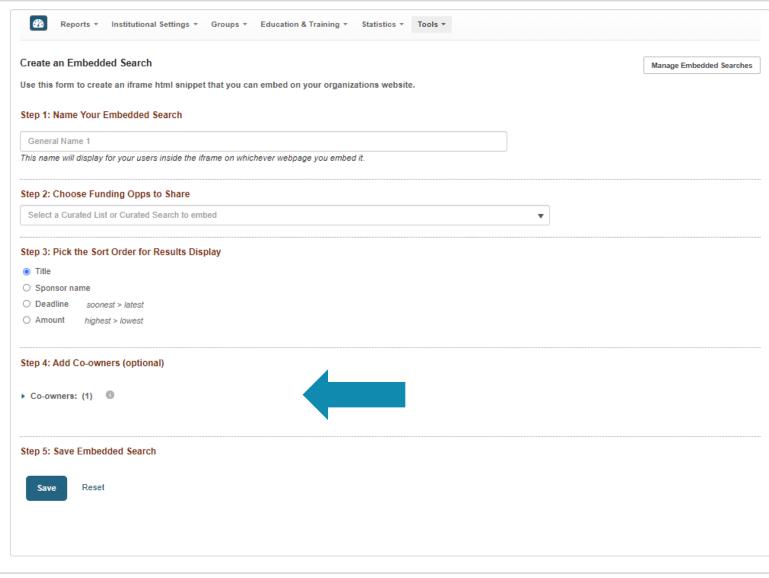
Multiple Ownership of Internal Opportunities



- When you create or edit internal funding opportunities, you can add multiple owners from a drop-down list of admins with 'manage internal funding' privileges.
- The Manage Internal Opportunities page provides visibility to the coowners of your internal opportunities as well as an overview over the Institutional Internal Opportunities owned by colleagues



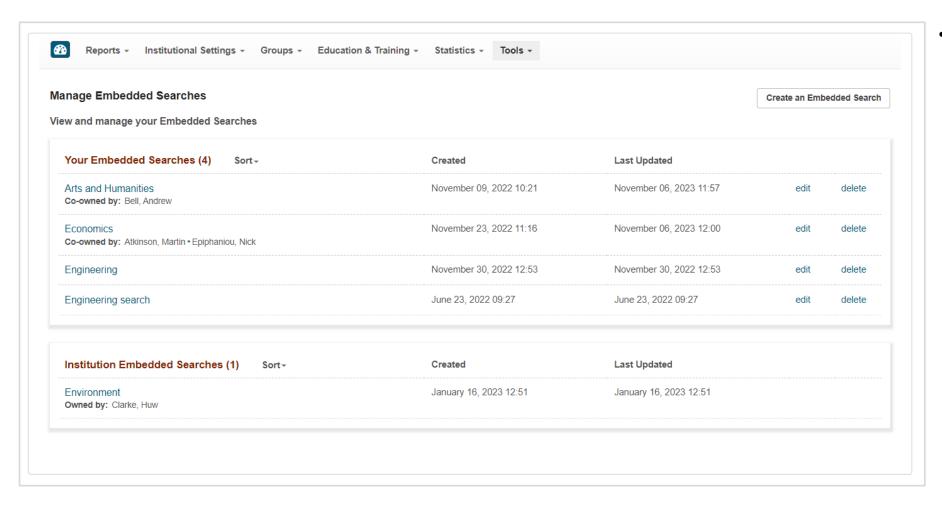
Multiple Ownership of Embedded Searches



- When you are creating a new embedded search or update an existing one, you can now add coowners.
- Select co-owners from a drop-down menu of all Admins with 'manage embedded searches' privileges.



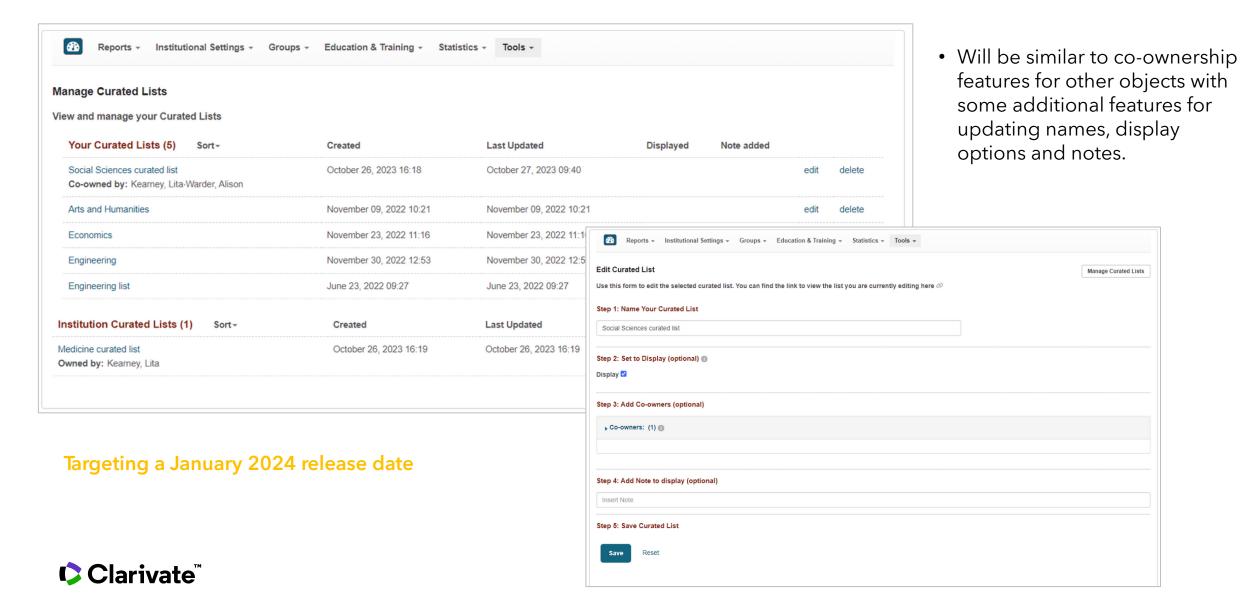
Multiple Ownership of Embedded Searches - continued



- The Manage Embedded Searches page provides visibility to see:
 - All your Embedded Searches and who coowns them
 - All Institutional Embedded Searches owned by other administrators at your institution



Coming Soon - Shared Curated Lists and Curated Searches



2024 Roadmap Preview



2024 Pivot-RP Roadmap Highlights: Goals & Themes



New Features & Enhancements

Key Benefits: Deliver new features and enhancements, including customer requested improvements and expanded data-driven functionality

- Customer inspired enhancements including new filter and search features for Admins and end-users
- UI and usability improvements
- Expanded reporting to help measure ROI and track usage



Clarivate & Partner Integrations

Key Benefits: Improve collaborator discovery, analytics and deliver unique additional value by leveraging integrations with other services

- Integrations with Web of Science, InCites Benchmarking & Analytics and Esploro to improve profile data, recommendations and proposal success rates
- New customer-facing funding API
- Evolving integrations with Cayuse, InfoReady and other tools



Data & Operational Excellence

Key Benefits: Expanded funding and grant content; Deliver operational efficiencies to improve system performance, security, data accuracy and quality, user accounts

- Expanded funding and more frequent awarded grant content
- New SSO login/user account control options - Bulk account creation and deletion
- SSO migration project



Research Professional News

Key Benefits: Expanded integration of funding policy news, funder and funding agency insights, and special reports with free and premium Pivot-RP integrations

- Streamlined access options and user workflows for Pivot-RP and direct login
- Redesigned email News alerts with customizable topic selection
- Free webinars with funding sector leaders and global policy makers



Select Roadmap Highlights

-

Customer-facing Enhancements

- Redesigned public groups pages: More dynamic and customizable groups pages to make it easier for admins to share content and engage with members
- Save or share department level advisor alert/recommendations: Admins and end-users can link to, save and share the department level advisor alerts linked to profiles to leverage department level funding recommendations
- Add the ability for individuals to limit the visibility of their profile: Allows individuals to make their profile invisible to anyone but themselves
- New Filter and search options for types of 'anticipated' states & 'new rounds added': Ability to filter calls by different types of anticipated states, like 'coming soon' vs 'anticipated' (expected to come back) vs 'anticipated' (not sure it is coming back); Ability to filter and search only calls with recently received new deadline

- **New customer facing funding API:** Enables customers to extract opportunities data for further integration within their own systems
- Provide statistics for Newsletters: Allow admins to see how many people have interacted with newsletters
- Add more selective admin rights around institutionally tracked opportunities: Only allow certain admins to be able to see who is tracking an opportunity or to add tracked opps to a user's tracked opps folder
- Make 'sort by funder' functionality multifaceted: When sorting by funder display opportunities by funder as well as by deadline soonest
- Internal deadline visibility within calendars: Make internal deadlines for individual opportunities visible to end-users in calendars
- Allow institutions to enable authentication solely via SSO:
 Ability to turn off email/password option for login to meet institutional security requirements and ensure only current users can access the service



Select Roadmap Highlights



Customer-facing Enhancements - continued

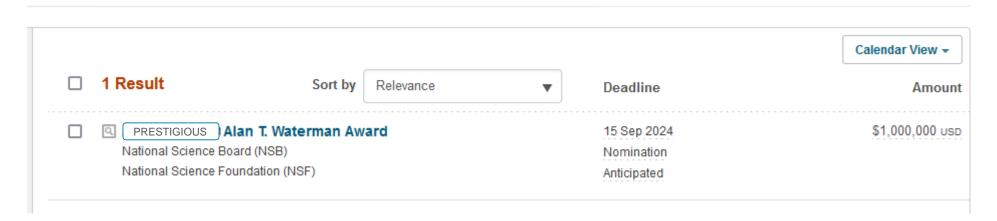
- Add ability to view usage reports by departments: View or sort reports broken down by departments for users with profiles
- Enable keyword search expansion for 'parent' and 'grandparent' terms: Make it possible for user to broaden searches up the keyword tree in addition to 'explode'/include terms down the keyword tree
- Add an administrative page for users to tune their Advisor alert: Add clearer options for administer and tune one's own advisor alert to improve funding recommendations
- Add an identifier for prestige prizes and 'honorifics': Ability to filter and highlight "honorifics" in Pivot-RP similar to handling of 'internal opps' or 'limited' submissions pills

Your feedback and suggestions requested



Prestige Prizes, Awards & Honorifics

Your feedback and suggestions requested





Add an identifier for prestigious prizes and 'honorifics': Ability to filter and highlight "honorifics" in Pivot-RP similar to handling of 'internal opps' or 'limited submission' pills

- Editors will tag certain prizes and awards as prestigious (based on pre-defined, curated list)
- May include more 'honorifics' which would include opportunities that don't have monetary awards
- Might include more awards requiring nominations vs. applications
- Will "crowdsource" the list of prestigious awards from customer community and share/update quarterly
- List will not be comprehensive as there will be differences of opinion on the definition of 'prestigious'



Announcements & Resources





Research Offices of the Future

Wednesday, November 29, 2023





Research Professional News Survey Webinar

Discover the biggest challenges and opportunities facing research office teams around the world in the 2023 The Future of Research Office Survey Report.

This global report is based on findings of more than:

- 800 research services leaders, research managers and administrators
- 800 researchers

Topics covered include:

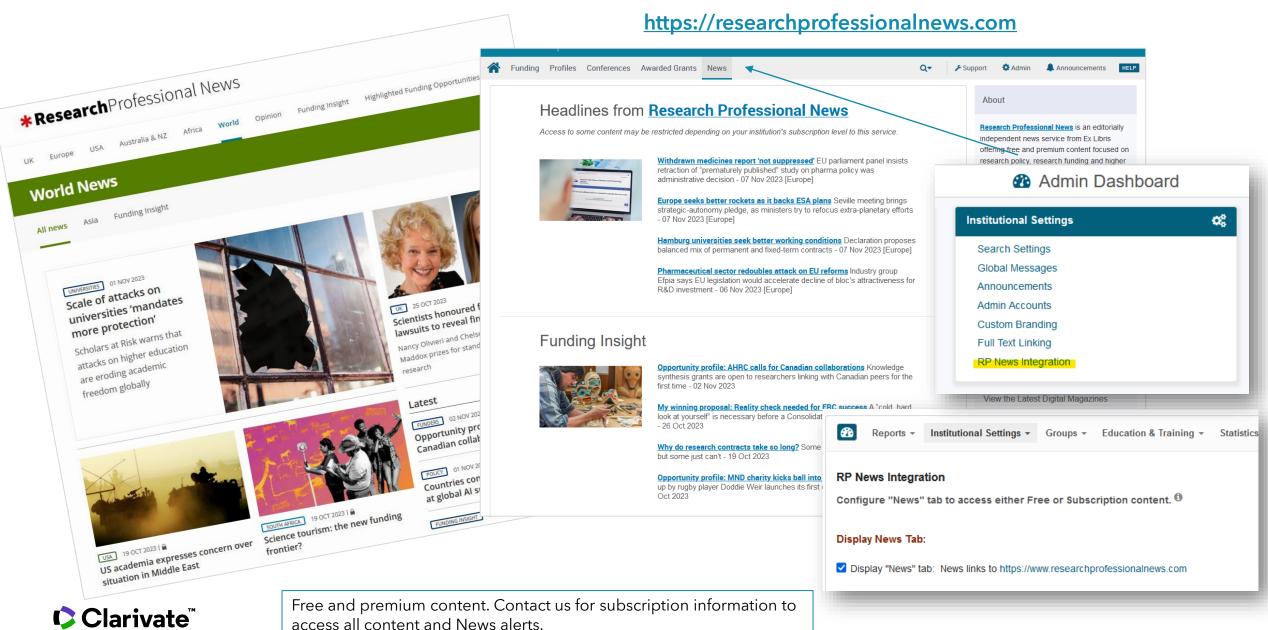
- •The top challenges research offices face today: resourcing, Assessment and integrity
- •How Al could benefit the research office
- •The changing view of research impact

November 29

10:00 AM | Eastern Time (US & Canada) 3:00 PM | United Kingdom

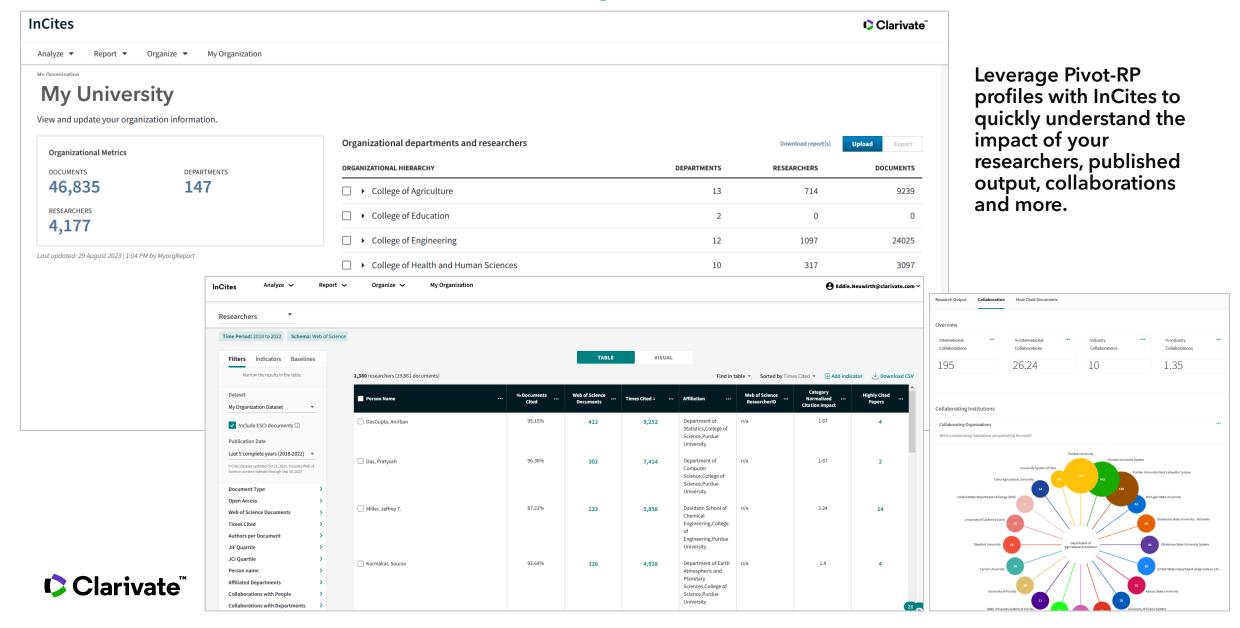
Register Today!

All customers can enable the RP News Tab via the Admin Dashboard



Understand the Impact of your Research - Demonstrate Impact to Funders

New Powerful Pivot-RP and InCites B&A Integration



Single Sign On (SSO) Migration Project

Change Required in 2024 - What you need to know?

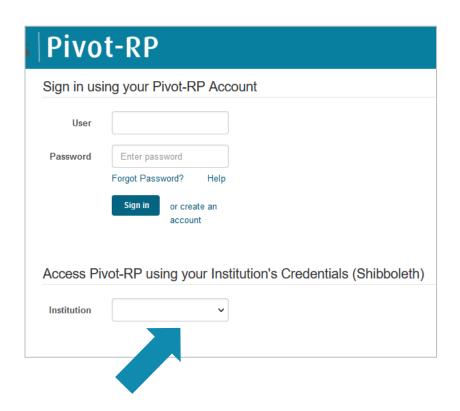
In 2023, the Pivot-RP team launched a new Clarivate SSO service to be able to allow customers to use their Institutional login.

All customers who were configured for SSO/Institutional Login <u>prior to April</u> 2023 will be migrated over from our previous SSO service to the new SSO service through the first half of 2024.

This work will be completed by our development team who will work with cohorts of 5-10 customer sites at a time. Most customer will not need to do anything other than to ask their IT team to make a minor configuration change once our team completes their work.

For those customers impacted, <u>you will receive direct communications via email from our team with any instructions or requests for information</u>. Please be on the lookout for any information we might send related to SSO to ensure that you don't experience any disruptions to your ability to use Institutional login.

If you would like to volunteer your institution to be among our first cohorts of customers to be migrated, please contact our Support team. This would be a great help to make sure we can space out the work needed to smoothly transition all customers.



Any Questions? Contact our Support Team



Release Notes Archives

If you've missed any information on past releases, visit

https://knowledge.exlibrisgroup.com/Pivot/Release_Notes/Pivot_Release_Information for links to previous release notes.



https://knowledge.exlibrisgroup.com/Pivot



Training and Videos

https://knowledge.exlibrisgroup.com/Pivot/Training

Training

All the training videos below are newly designed.

Getting Started with Pivot-RP

Basic information that researchers and staff need to start using Pivot-RP, including setting up your account, claiming and updating your profile, and searching for funding opportunities.

Sharing Content with Pivot-RP

Groups

Create and manage user groups in Pivot-RP.

which can be used to share funding

opportunities and more with users with similar

Working with Pivot-RP Funding Opportunities

These training sessions will show the primary Pivot-RP workflows, including using basic and advanced search; navigating funding results; and tracking, saving, sharing, and managing funding opportunities.

Searching Awarded Grants and Conferences

Find out who has already received various funding. Find opportunities to present your work at conferences and in journals.

Working with Pivot-RP Profiles

₩ <

Use Pivot-RP to find researchers with whom you can collaborate; and update your own Pivot-RP Profile so you can get relevant funding matches targeted to you.

Pivot-RP Admin Essentials

Pivot-RP administrators will learn how to customize, configure, and manage Pivot-RP for their institution.

Recorded Training Webinars and Slides



These training webinar recordings demonstrate and explain how to use Pivot-RP. Three of the videos are aimed at regular users, such as researchers looking for funding opportunities. Two of the videos are aimed at the Pivot-RP administrators facilitating the use of Pivot-RP at their institution.

All new recorded training webinars and slides.

Great for onboarding new Admins or researchers.

Recorded Training Webinars and Slides

Training for Researchers

Getting Started with Pivot-RP Profiles

The objectives of this session are to describe Pivot-RP and its benefits for research funding and collaboration; create, claim, or revise a professional profile; and discover research collaborators through Pivot-RP profiles.

This is end user session 1 of 3. Duration: 20 minutes.

Funding Opportunities for Pivot-RP End Users

The objectives of this session are to discover funding opportunities using Pivot-RP, navigate and refine results, and manage your funding opportunities.

This is end user session 2 of 3. Duration: 32 minutes.

Conferences, Papers Invited, and Awarded Grants in Pivot-RP

The objectives of this session are to identify upcoming conferences and special journal issues and to find awarded grants.

This is end user session 3 of 3. Duration: 21 minutes

Training for Administrators

Managing Pivot-RP Admin User Accounts, Privileges and Reports

The objectives of this session are to set administrator privileges and manage admin users, create usage reports and access advanced statistics.

Duration: 26 minutes.

Tools for Pivot-RP Admins for Managing and Sharing Opportunities

The objectives of this session are to curate opportunity lists and searches, and to use multiple tools for promoting opportunities with Pivot-RP.

Duration: 27 minutes.

Accompanying PowerPoint Presentations

Getting Started with Pivot-RP Profiles



Thank You

Eddie Neuwirth, Sr. Director of Product Management - Eddie.Neuwirth@clarivate.com Lotte Krause, Senior Product Manager - Lotte.Krause@clarivate.com

About Clarivate

Clarivate is the leading global information services provider. We connect people and organizations to intelligence they can trust to transform their perspective, their work and our world. Our subscription and technology-based solutions are coupled with deep domain expertise and cover the areas of Academia & Government, Life Sciences & Healthcare and Intellectual Property. For more information, please visit clarivate.com

© 2023 Clarivate