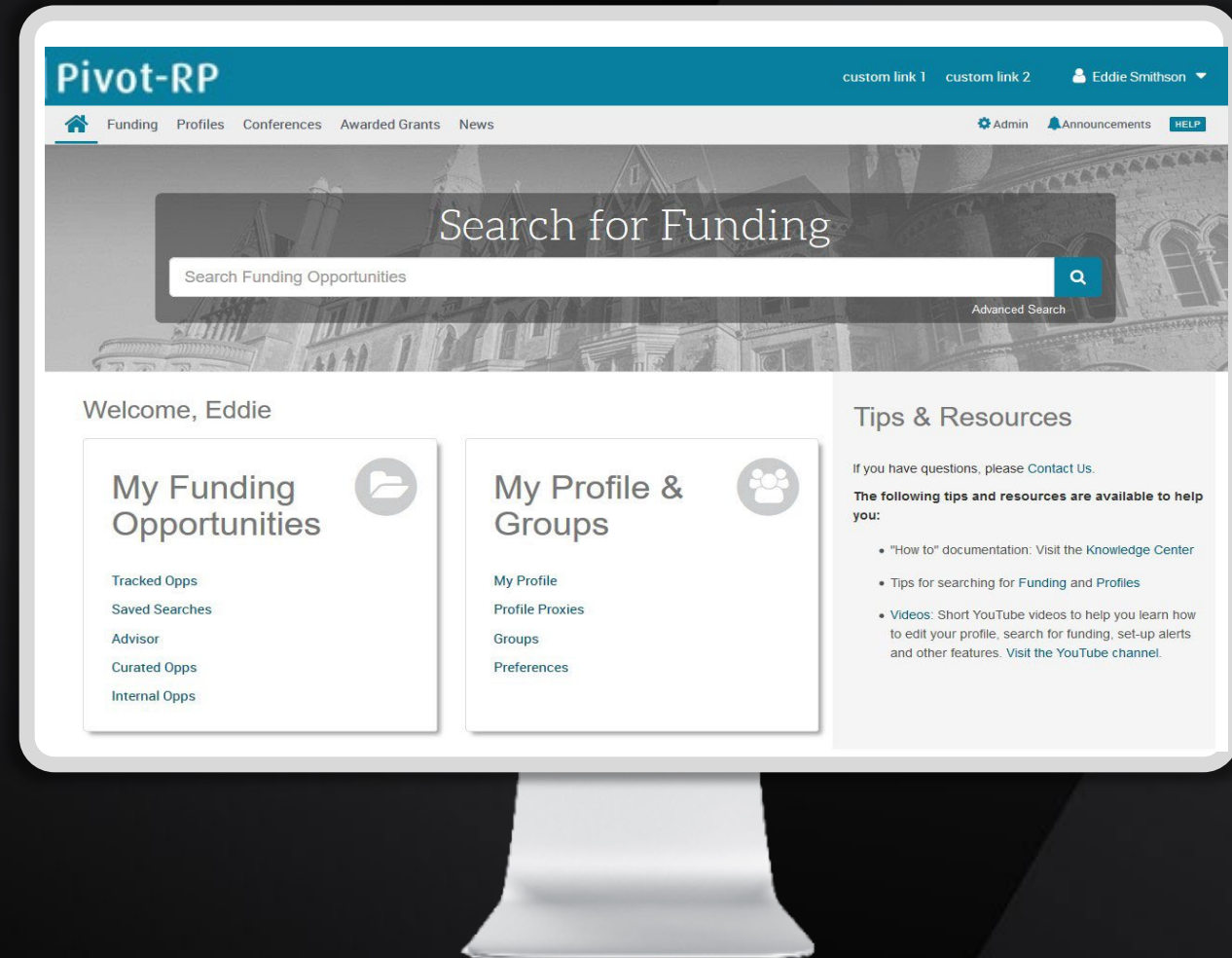


Pivot-RP Update & February Release Webinar



Agenda

- **Key contacts and support reminders**
 - Customer Success team expansion
 - goPivot-RP resources for Research Professional customers
- **What's New – February release overview**
 - Content Updates
 - Shared ownership of curated searches and curated lists
- **Roadmap Preview for 2024**
- **Important Announcements and Resources**
 - Research Professional News survey results
 - Branding changes coming for Pivot-RP
 - 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



Amalie Stenfeldt-Jurgensen

Customer Care, Team Leader



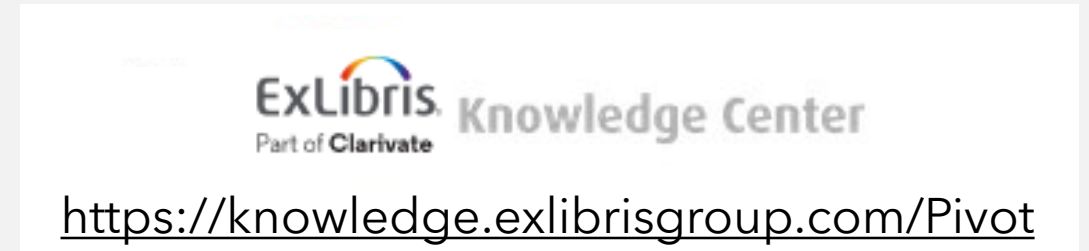
Huw Clarke

Customer Care Team

We want to hear from you

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

Expanded Customer Success and Training Org



We want to hear from you

Expanded Customer Success Team



Andy Bell

Customer Success Manager

Andy.Bell@clarivate.com



Nick Epiphaniou

Customer Success Manager

nick.epiphaniou@clarivate.com

For Research Professional Customers not yet engaged with Pivot-RP, use...

Go Pivot-RP

goPivotRP@clarivate.com

Customer Care - Go Pivot-RP

Amalie Stenfeldt-Jurgensen

Huw Clarke

Most enhancements driven by customer requests

idea|exchange

How can we improve Pivot-RP?

Enter your idea

Hot Top ideas New Category Status My feedback

Have an Idea for us?

Share your ideas

Support your favorite ideas

Get feedback on popular ideas

We'd love to hear your ideas for us!

<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.

RP to Pivot-RP Migration Resources

Go Pivot-RP Programme

https://knowledge.exlibrisgroup.com/Research_Professional/Product_Materials/005Research_Professional_to_Pivot-RP

Home » Research Professional » Product Materials » Research Professional to Pivot-RP

Part of **Clarivate**

[< Back](#) Research Professional

Research Professional to Pivot-RP

◀ Product Materials | Upgrade from Research Professional to Pivot-RP Frequ... ▶

— Table of contents

- 1. Introduction
- 2. How to Get Started - What is Pivot-RP?
- 3. Go Pivot-RP Programme
- 4. Key Pivot-RP Resources

Introduction

Thank you for your interest in moving from Research Professional to Pivot-RP. This page provides answers to your questions and provides access to key Pivot-RP resources to make the move to Pivot-RP a seamless experience for your researchers.

How to Get Started - What is Pivot-RP?

- [Upgrade from Research Professional to Pivot-RP FAQ](#)
- [Pivot-RP New UI Preview](#) (High-level overview of what's different from Research Professional)
- [Unique Pivot-RP communications features](#)
- Integration between Research Professional and Pivot-RP (June 21, 2023) – [Webinar Recording](#)
- University of Leeds case study: Why migrate to Pivot-RP (15 minutes) – [Webinar Recording](#)

Go Pivot-RP Programme

Migrating to Pivot-RP is an easy self-serve process for Research Professional Admins. Our Go Pivot-RP team and online resources are here to help guide you each step of the way. Follow the [Go Pivot-RP](#) link below to learn more; join a [Q&A Sessions](#) to meet up with our Client Services team; and be sure to watch our introductory [RP to Pivot-RP overview video](#) on migrating

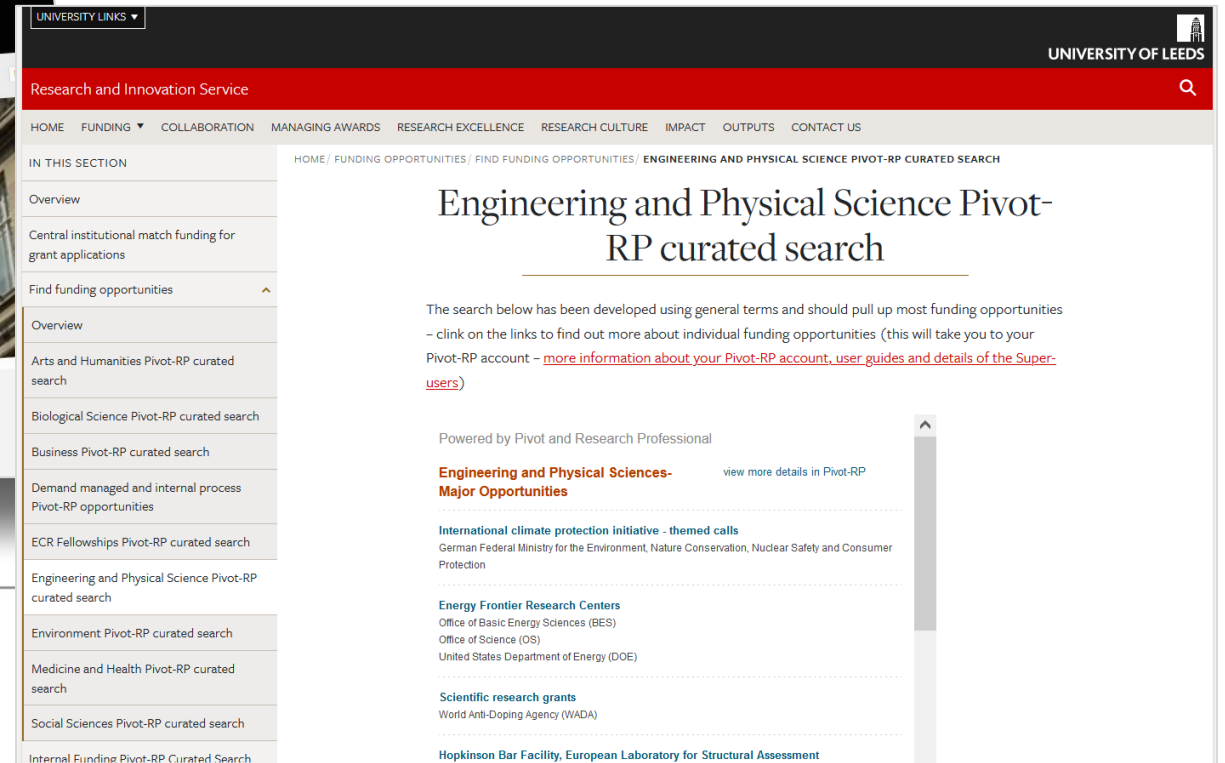
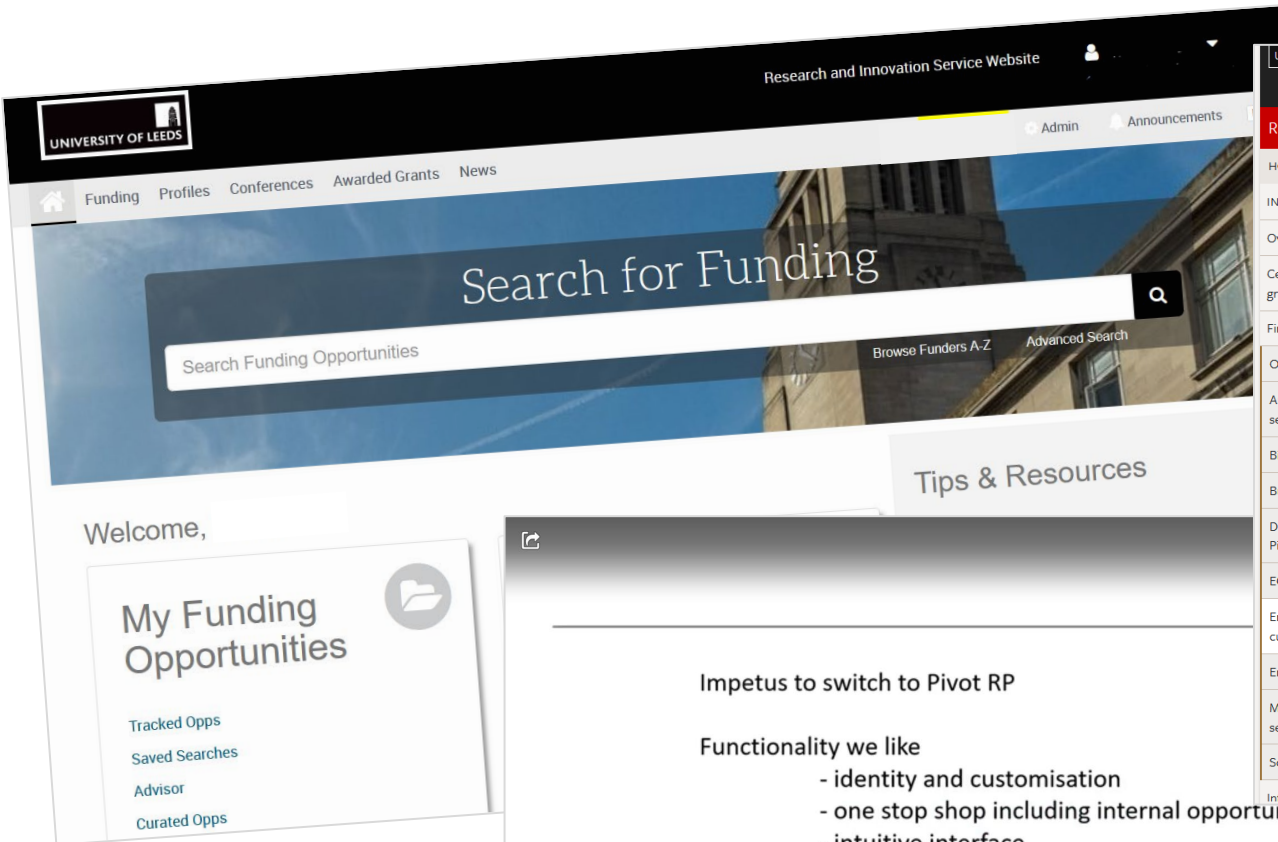
Why Migrate?

- **Powerful new features and functionality**
- **Customisable User interface**
- **Ability to promote research office services and re-engage faculty**

No Additional Cost

RP to Pivot-RP Migration Case Studies

Customisation and Expanded Functionality



Impetus to switch to Pivot RP

Functionality we like

- identity and customisation
- one stop shop including internal opportunities
- intuitive interface
- internal communications



Experience of the change from Research Professional

- University of Leeds case study: Why migrate to Pivot-RP (15 minutes) – [Webinar Recording](#)

Helen Pickard
Research Development Manager
University of Leeds

RP to Pivot-RP Migration Case Studies

Customisation and Expanded Functionality



Attention, researchers! Looking for research funding opportunities is about to get a lot easier.

We're launching Pivot-RP to help you find research funding opportunities that align with your discipline area/s, research interests and career stage, and bring relevant opportunities to your inbox.

Macquarie University is upgrading from Research Profiles to Pivot-RP. Pivot-RP will better serve the needs of individual researchers.

Introducing Pivot-RP

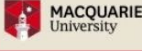
ABOUT PIVOT-RP
Pivot-RP is a searchable database of research funding opportunities and collaborators across all disciplines and project types. It is a trusted and comprehensive source of global funding information from a range of different funding bodies, from public funding institutions to not-for-profit opportunities.

WHAT'S NEW
The 'Intelligent Advisor' is an exciting new feature that analyses several

Pivot-RP is a one-stop-shop tool to support the University's research funding and collaboration goals.

Macquarie University (MQ) support resources for Pivot-RP users


- MQ Pivot-RP webpage
- MQ Pivot-RP Quick Start Videos
- Macquarie University (MQ) Pivot-RP FAQs.pdf
- Pivot-RP Workshops





MACQUARIE
University
SYDNEY AUSTRALIA


MQ Research Services: Grant Development Notification of Intent (NOI) form


Proxied by: Eddie Neuwirth


 Funding


 Profiles


 Conferences

 Awarded Grants


 News

 Admin

 Announcements

 HELP


Search for Funding



[Browse Funders A-Z](#)[Advanced Search](#)


Welcome,

My Funding Opportunities



- Tracked Opps
- Saved Searches
- Advisor
- Curated Opps

My Profile & Groups



- My Profile
- Profile Proxies
- Groups
- My Preferences

Tips & Resources

Please refer to the Macquarie University **Pivot-RP webpage** for information and resources for getting started with Pivot-RP.

If you have questions, please email the Macquarie University Grant Development Team (grant.development@mq.edu.au), including 'Pivot-RP' in the subject line, or the Pivot-RP team (**Contact Us**).

The following tips and resources are available to help you:

- "How to" documentation: Visit the **Knowledge Center**

RP to Pivot-RP Migration Case Studies

Customisation and Expanded Functionality

The image displays three overlapping screenshots of The University of Queensland's research-related web portals.

- Top Screenshot (Main Website):** Shows the university's main navigation bar with links for Study, Research, Partners and community, and About. A search bar is located in the top right corner.
- Bottom Left Screenshot (Pivot-RP Portal):** Titled "Discover funding opportunities", it describes the UQ Pivot-RP Portal as a primary tool for researchers to browse and search for funding opportunities. It lists nine steps for using the portal, including "About Pivot-RP", "Set up your account", "Manage your Pivot-RP Profile", "Search for funding and opportunities", "View and manage opportunities", "Find collaborators using Profiles", "Conferences", "Awarded Grants", and "Pivot-RP help and further information".
- Bottom Right Screenshot (Search for Funding):** A dedicated page for searching funding opportunities. It features a large search bar, a "Browse Funders A-Z" link, and an "Advanced Search" option. Below the search bar, there are sections for "Welcome," "My Funding Opportunities" (with links for Tracked Opps, Saved Searches, Advisor, and Curated Opps), "My Profile & Groups" (with links for My Profile, Profile Proxies, Groups, and My Preferences), and "Resources for UQ Researchers" (providing contact information for the Grants Team and Research Partnerships Manager).

How to Get Started?

Go Pivot-RP

Learn more in the knowledge center

[https://knowledge.exlibrisgroup.com/Research Professional](https://knowledge.exlibrisgroup.com/Research_Professional)

- If you want to learn more about upgrading from Research Professional to Pivot-RP, please review the information under [Research Professional to Pivot-RP](#).

Email Us

goPivotRP@clarivate.com

The screenshot shows a web page titled "Research Professional to Pivot-RP" under the Clarivate logo. The breadcrumb trail is: Home » Research Professional » Product Materials » Research Professional to Pivot-RP. A "Back" button is visible. The main heading is "Research Professional to Pivot-RP". Below it, a "Table of contents" sidebar lists: 1. Introduction, 2. How to Get Started - What is Pivot-RP?, 3. Go Pivot-RP Programme, and 4. Key Pivot-RP Resources. The "Introduction" section is expanded, showing a thank you message and a list of resources: "Upgrade from Research Professional to Pivot-RP FAQ", "Pivot-RP New UI Preview (High-level overview of what's different from Research Professional)", "Unique Pivot-RP communications features", "Integration between Research Professional and Pivot-RP (June 21, 2023) - Webinar Recording", and "University of Leeds case study: Why migrate to Pivot-RP (15 minutes) - Webinar Recording". The "Go Pivot-RP Programme" section is also visible, starting with "Migrating to Pivot-RP is an easy self-serve process for Research Professional Admins."

Home » Research Professional » Product Materials » Research Professional to Pivot-RP

Part of **Clarivate**

< Back

Research Professional

Research Professional to Pivot-RP

Product Materials | Upgrade from Research Professional to Pivot-RP Frequ...

Introduction

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How to Get Started - What is Pivot-RP?

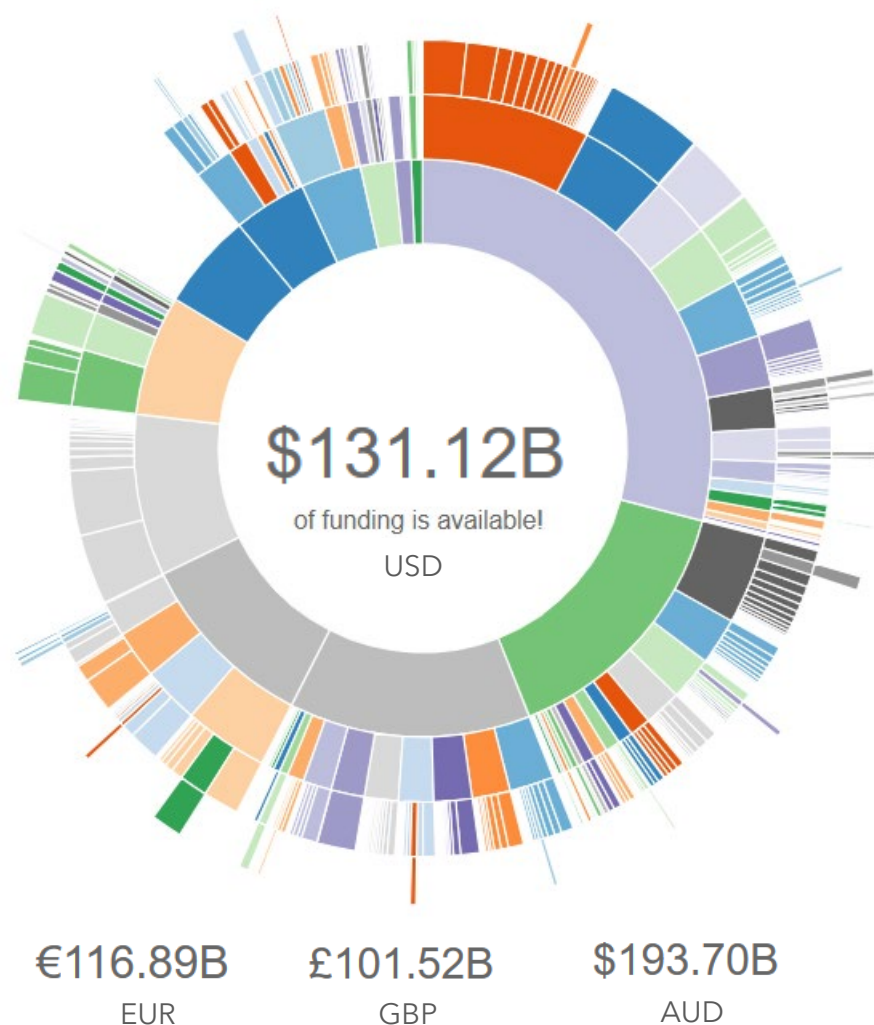
- Upgrade from Research Professional to Pivot-RP FAQ
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Recent Enhancements

Pivot-RP by the Numbers – Year End & Current Snapshot



- 34,217 + Active Opportunities
- 22,000+ published funders of which 9,955+ have currently got published opportunities
- 6,500+ newly added opportunities in 2023
- 700+ new funders added in 2023
- 38,224+ updated opportunities in 2023



Over 9,000,000 weekly email alerts sent YTD

New Funders added to Awarded Grants database

- 3 New Funders Added since November 2023:
 - Fonds de Recherche du Quebec (FRQ)
 - Industrial Strategy Challenge Fund (ICSF)
 - Deutsche Forschungsgemeinschaft (DFG)
- **68** major funders in our database
- **updated 30+ funders** to add 65,000 additional individual awarded grants

Awarded Grants		Your Search: (sponsor.keyword:("Fonds de Recherche du Quebec (FRQ)"))		
		New Search Advanced Search Refine Search		
Funder		34,082 Results	Sort ▾	
Fonds de Recherche du Quebec (FRQ)		Exploration du rôle de la voie de réparation de l'ADN par excision de nucléotides dans un modèle Drosophile de tauopathie	2013-01-01	\$54,323 CAD
Year		Harvard University Fonds de Recherche du Quebec (FRQ) Antoine Duquette		
2020:	2951	Les corrélats neurophysiologiques de la perception des campagnes anti-tabac chez des fumeurs chroniques: une étude en IRMf	2013-01-01	\$21,249 CAD
2019:	3027	Hopital Louis-H. Lafontaine Fonds de Recherche du Quebec (FRQ) Laurence Dinh-Williams		
2018:	3309	La susceptibilité aux infections mycobactériennes: rôle du réseau transcriptionnel d'IRF1/IRF8	2013-01-01	\$60,000 CAD
2017:	3061	McGill University Fonds de Recherche du Quebec (FRQ) David Langlais		
2016:	2880	Le diagnostic préimplantatoire en oncogénétique: enjeux éthiques et autonomie reproductive	2013-01-01	\$40,000 CAD
2015:	1989	Centre Hospitalier De l'Université De Montréal Fonds de Recherche du Quebec (FRQ) Stéphanie Côté		
2014:	2583	Études des mécanismes moléculaires impliqués dans la différenciation des neurones moteurs de type gammas et de l'activité fusimotrice en condition normale et pathologique.	2013-01-01	\$11,249 CAD
2013:	2451	Columbia University Fonds de Recherche du Quebec (FRQ) Mélanie Lalancette-Hébert		
2012:	2161	Étude des voies de signalisation intracellulaire activées par des éléments moléculaires pathogéniques liés à la production de molécules pro-inflammatoires durant les infections pulmonaires.	2008-01-01	\$30,000 CAD
2011:	2229	McGill University Health Centre Fonds de Recherche du Quebec (FRQ) Simon Rousseau		
more...		Développement d'un protocole d'évaluation des besoins en terme de dispositifs d'aide à la conduite auprès de personnes traumatisées accidentellement	2005-01-01	\$6,845 CAD
Currency		Centre De Réadaptation Constance-Lethbridge Fonds de Recherche du Quebec (FRQ) Isabelle Gélinas		
CAD:	34082			
Institution				
McGill University:	5189			
University of Montreal:	5170			
Université Laval:	4626			
Université du Québec:	2842			
Université de Sherbrooke:	2734			
Concordia University:	1693			
Ecole Polytechnique:	853			
Université du Québec à...:	780			
École de technologie S...:	701			
Institut National de I...:	643			

What's New

Ability to Share Admin Ownership for Multiple Objects

#1 ideaexchange

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

February 15

- Newsletters
- Internal Funding Opportunities
- Embedded Searches

November 14

52

votes

[Vote](#)

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

[Vote](#)

Allow multiple administrators of newsletter

Allow for a newsletter to be accessed from multiple admin accounts.

1 comment · Other

16

votes

[Vote](#)

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.

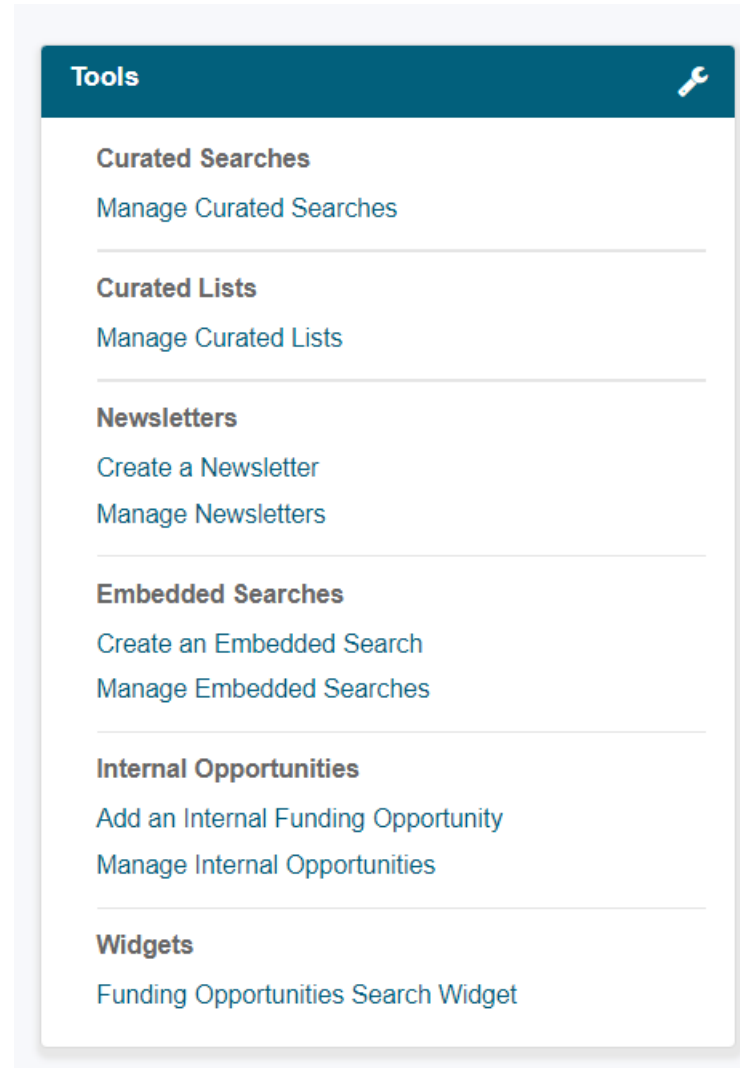
0 comments · Administrative Tools

Adding Co-owners from the Admin Dashboard

The Tools section on the Admin Dashboard provides links to allow admins to easily manage:

- Curated Searches
- Curated Lists
- Newsletters
- Embedded Searches
- Internal Opps

All objects can now be assigned Co-owners



New

Managing Shared Admin Ownership for Curated Lists and Searches

Curated Lists can now be co-owned by different Admins

Managing Curated Lists:
select 'edit' to edit the list name,
display options, notes and co-owners

Manage Curated Lists

View and manage your Curated Lists ⓘ

Your Curated Lists (1)	Sort ▾	Created	Last Updated	Set to Display	Note Added	
Engineering List Co-owned by: Kearney, Lita • Clarke, Huw		20 Mar 2013	07 Feb 2024	✓	edit	delete

Institution Curated Lists (71)	Sort ▾	Created	Last Updated	Set to Display	Note Added	
Accessibility Owned by: Laughlin, Airaka		28 Oct 2019	28 Oct 2019	✓		


All Curated Lists set to 'Display' will be visible in the Institution Curated Lists section for administrators

Note: Only Admins with privileges to Curate Funding Opportunities can be co-owners of curated lists or curated searches

Editing Curated Lists

Easily add Co-owners
from the dropdown
menu

Note: Only Admins with privileges
to Curate Funding Opportunities
will be listed

 Reports ▾ Institutional Settings ▾ Groups ▾ Education & Training ▾ Statistics ▾ Tools ▾

Edit Curated List

Use this form to edit the metadata and co-owners of the selected curated list.
You can find the link to view and delete individual opportunities from the curated list itself here: [🔗](#)

Step 1: Name Your Curated List

Step 2: Set to Display (optional) ?

Display ☒

Step 3: Add Co-owners (optional)

▼ Co-owners: (2) ?

▼

Clear


★ Krause, Lotte x


Atkinson, Martin x


Step 4: Add Note to display (optional)


B

I









Insert note ...

0 of 500 characters

Step 5: Save Curated List

Save






Reset

Curated Searches can now be co-owned by different Admins

Managing Curated Searches:
select 'edit' to edit the search name, display options, notes and add co-owners

Manage Curated Searches

View and manage your Curated Searches ⓘ

Your Curated Searches (2)	Sort ▾	Created	Last Updated	Set to Display	Note Added	
Business		19 Aug 2022	07 Feb 2024	✓		 edit  delete
Engineering Search Co-owned by: Kearney, Lita		28 Aug 2017	07 Feb 2024	✓		 edit  delete

Institution Curated Searches (35)	Sort ▾	Created	Last Updated	Set to Display	Note Added	
Agriculture Owned by: Clarke, Huw		27 Mar 2023	27 Mar 2023	✓		

All Curated Searches set to 'Display' will be visible in the Institution Curated Searches section for administrators

Note: Only Admins with privileges to Curate Funding Opportunities can be co-owners of curated lists or curated searches

Editing Curated Searches

Easily add Co-owners
from the dropdown
menu

Note: Only Admins with privileges
to Curate Funding Opportunities
will be listed

Edit Curated Search

Use this form to edit the metadata and co-owners of the selected curated search.
You can find the link to view the curated search results here: [🔗](#)

How to edit the parameters of the curated search ⓘ

Step 1: Name Your Curated Search

Step 2: Set to Display (optional) ⓘ

Display ☒

Step 3: Add Co-owners (optional)

▼ Co-owners: (2) ⓘ

▼

Clear

★ Krause, Lotte x

Atkinson, Martin x

Step 4: Add Note to display (optional)

B *I*

Testing the Note

16 of 500 characters

Step 5: Save Curated Search

Save

Reset

New Saved Searches/Curated Searches Tabs

Saved Searches and Curated Searches are now separate entities, appearing in separate tabs

The screenshot shows the Clarivate interface with a sidebar on the left containing navigation tabs: Tracked (209), Saved / Curated Searches (37 / 65), Shared, Received, Advisor (784), Curated (108), and Internal (25). The main content area has two tabs: 'Saved Searches (37)' and 'Curated Searches (65)'. The 'Saved Searches' tab is active, displaying a table of searches. A blue arrow points from the text above to the 'Curated Searches' tab. The table lists four searches: 'Advisor Alert', 'Agriculture search', 'Agriculture Sweden', and 'Artificial Intelligence'. Each row shows 'New Results for Jan 21 2024', 'All Results', and an 'Email alerts' icon. The 'Options' menu for the 'Artificial Intelligence' search is open, showing actions like 'Share', 'Move to Curated Search', 'Rename', 'Refine Search', 'Add Tags', 'View archived results', 'Alert email off', and 'Delete this search'. A blue arrow points from the text below to the 'Move to Curated Search' option.

Saved Searches (37)	New Results for Jan 21 2024	All Results	Email alerts
Advisor Alert	35 / 0	790 / 41	[Email icon] Options
Agriculture search	12 / 0	412 / 7	[Email icon] Options
Agriculture Sweden	0 / 0	811 / 14	[Email icon] Options
Artificial Intelligence	2 / 0	96 / 4	[Email icon] Options


To create a Curated Search, start with a Saved Search and select 'Move to Curated Search' from the "Options" menu.

This will convert the saved search to a curated search and place it on the Curated Searches tab


New Saved Searches/Curated Searches Tabs


The curated searches "Options" menu has been updated with the following:

Saved Searches (37)


 Curated Searches (62)

Curated Searches (62)

New Results for Jan 21 2024 


All Results 


Email alerts


 Agriculture

262 / 0

11826 / 157




Options 

 Agriculture Sweden


18 / 0

811 / 14

 Artificial Intelligence


0 / 0

2 / 0

 Arts and Hum


231 / 0


9016 / 333

 Arts and Humanities Denmark


0 / 0


67 / 1





Options 


Share


 Duplicate as a Saved Search


 Edit details and owners

 Refine Search

 Add Tags

 View archived results

 Alert email off

 Delete this search

Duplicate as a Saved Search -> creates a copy of the search as a saved search (and places it on the Saved Searches tab)

- **Edit details and owners** -> takes the admin to the Edit Curated Search tool
- **Refine Search** -> Refines the search parameters of the Curated Search

Note: Curate Searches are still private unless you choose to share them with another owner, set them to display publicly, or share them via a link, newsletter, embedded search, etc.

Important Note: Alerts for Curated Searches

- With this release, **only the original owner of a curated search will receive a weekly email alert for that search**
- If a co-owner of a Curated Search would like to get a weekly email alert, they will need to go to the Curated Searches tab → options menu and select **"Duplicate as a Saved Search"**
- This will generate a copy of the curated search to their Saved Searches tab as a saved search for which they can then turn on email alerts

Saved Searches (37)

Curated Searches (62)

Curated Searches (62)

New Results for
Jan 21 2024

All Results

Email alerts

Agriculture

262 / 0

11826 / 157

Options

Agriculture Sweden

18 / 0

811 / 14

Artificial Intelligence

0 / 0

2 / 0

Arts and Hum

231 / 0

9016 / 333

Arts and Humanities Denmark

0 / 0

67 / 1

Options

Share

Duplicate as a Saved Search

Edit details and owners

Refine Search

Add Tags

View archived results


Alert email off

Delete this search

Curated Searches & Lists Appear on the Curated Tab

Welcome, Eddie

My Funding Opportunities



- Tracked Opps
- Saved Searches
- Advisor
- Curated Opps
- Internal Opps

Admins see any lists for which they are an owner or co-owner on the curated tab

Home

Funding

Profiles

Conferences

Awarded Grants

News

Tracked77

Saved / Curated Searches9 / 10

Shared

Received

Advisor387

Curated40

Internal25

My Curated Searches

ANZ medicine search625

Artificial Intelligence159

Boston VA demo search5

Cancer 100k28

Cancer demo search52

Computer Science over 500k150

Covid-19264

early childhood over 100k8

Energy Sciences (test dupe)3448

Limited Subs US gov253

My Curated Lists

Artificial Intelligence opps22

Cancer prevention27

Cybersecurity45

Early Childhood Education24

Food Safety29

Machine Learning opportunities15

Melbourne list6

Pre-sales demo5

Seed funding24

Artificial Intelligence

show details

159 Opportunities

Information Controls FOpen Technology Fund (O

Panacea Stars phasePanacea Innovation

Competition: It's GoodDefence and Security AccMinistry of Defence (MoD)

Villum synergyVillum Fonden (Villum FourVelux Foundations

LIMITED UKRI Centres tEngineering and Physical SUK Research and Innovati

Agilent Early Career PoAgilent Technologies

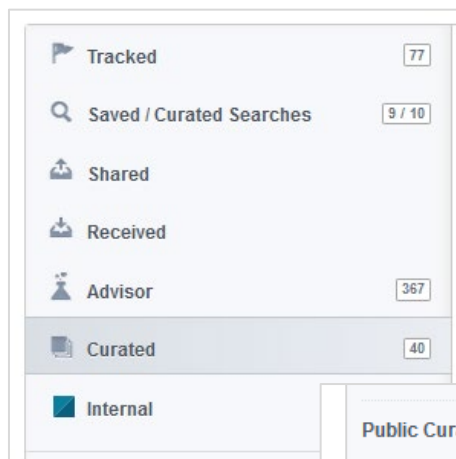
Innovation Exchange clevelInnovate UKUK Research and Innovati

Alnet FellowshipDeutscher Akademischer

Transatlantic Media FeHeinrich Boll Foundation NHeinrich-Böll-Stiftung

Investor PartnershipsInnovate UKUK Research and Innovati

Public Curated Searches & Lists



End users will only see Curated Lists or Searches on the Curated tab if they have been set to “Display” by an Admin.

Public Curated Searches and Lists are visible to all users at your institution.

Note: Curated items NOT set to Display on the curated tab can still be shared with users via a direct link, newsletter, etc.

Public Curated Lists and Searches

Brain research

16

Canada

13

canada 2

2844

Cancer Research

2

cardiology

1

DAAP

7

Data Science

1522

Food Science

5

Genome

10

Information Science

5

ITM

1

Nanotechnology

54

Oncology newsletter search

259

ProQuest - Digital Humanities

40

Salud Pmesut

10

Soil science

1

Solar Energy

8

学部生向けおすすめ案件

3

Artificial Intelligence

show details

Display

Edit Curated Search

159 Opportunities

Sort-

Deadline

Amount

Notice of Special Interest (NOSI): Administrative Supplements for Enhancing Recruitment and Retention of Diverse Populations to Cancer Screening, Cancer Prevention and Symptom Management Clinical Trials

National Institutes of Health (NIH)

United States Department of Health and Human Services (HHS)

28 Feb 2024

Application Confirmed

see record

PhD Fellowship Call

Danish Data Science Academy

28 Feb 2024

Application Confirmed

1,800,000 kr. DKK

ApogeeBio Post-doctoral Fellowship Program

Agorize

28 Feb 2024

Submission/Entry Confirmed

€72,000 EUR

Research Grants

Cervical Spine Research Society (CSRS)

28 Feb 2024

Letter of Intent Confirmed

\$150,000 USD

Artificial intelligence innovation to accelerate health research

Engineering and Physical Sciences Research Council (EPSRC)

UK Research and Innovation (UKRI)

28 Feb 2024

Letter of Intent Anticipated

£600,000 GBP

Updating the display of Curated Lists and Searches

Calendar View ▾

Engineering List 🔗 Display ☒ ? [Edit Curated List](#)

▼ hide details

Owned by: Kearney, Lita • Clarke, Huw • Krause, Lotte

This Curated List contains core calls for the Department of Engineering.

☐ **7 Opportunities**

	Sort ▾	Deadline	Amount
<input type="checkbox"/> Secondary Analysis of Existing Datasets in Heart, Lung, and Blood Diseases and Sleep Disorders (R21 Clinical Trial Not Allowed) National Heart, Lung, and Blood Institute (NHLBI) National Institutes of Health (NIH) United States Department of Health and Human Services (HHS)		28 Feb 2024 Application Confirmed	see record
<input type="checkbox"/> Tim Akers Memorial Scholarship Alaska Community Foundation (ACF)			

Select 'Edit Curated List' or 'Edit Curated Search' to edit the curated list or curated search, including to make changes to:

- name, display options, notes, and adding or updating co-owners

The Curated List and Curated Search header highlights owners and co-owners and displays a customizable note section

View as Search View as Search Calendar View ▾

Engineering Search 🔗 Display ☒ ? [Edit Curated Search](#)

▼ hide details

Owned by: Kearney, Lita • Krause, Lotte

This search contains calls of interest for the Department of Engineering.

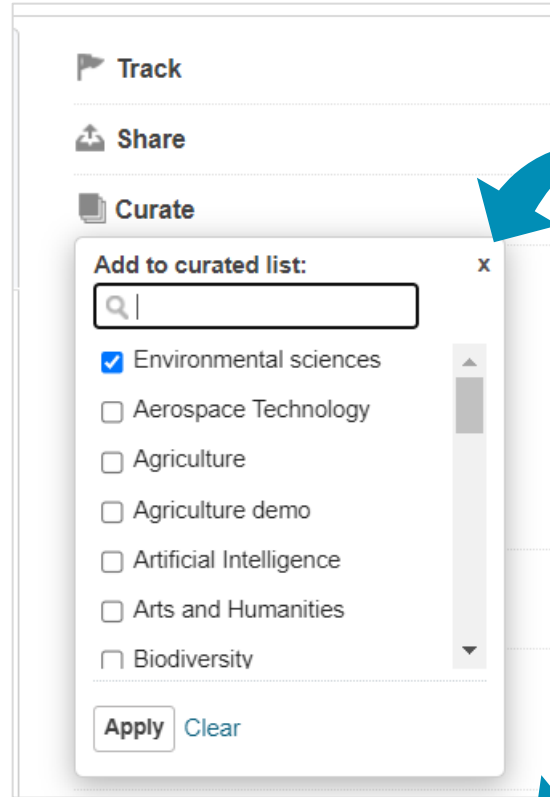
☐ **11 Opportunities**

	Sort ▾	Deadline	Amount
<input type="checkbox"/> Responsive Grants Community Foundation of the Holland/Zeeland Area		04 Mar 2024 Application Confirmed	\$60,000 USD
<input type="checkbox"/> Incitec Pivot Fertilisers Service to Industry Award Cotton Research and Development Corporation (CRDC)		02 Apr 2024 Nomination Anticipated	\$2,000 AUD

Adding Opportunities to Curated Lists

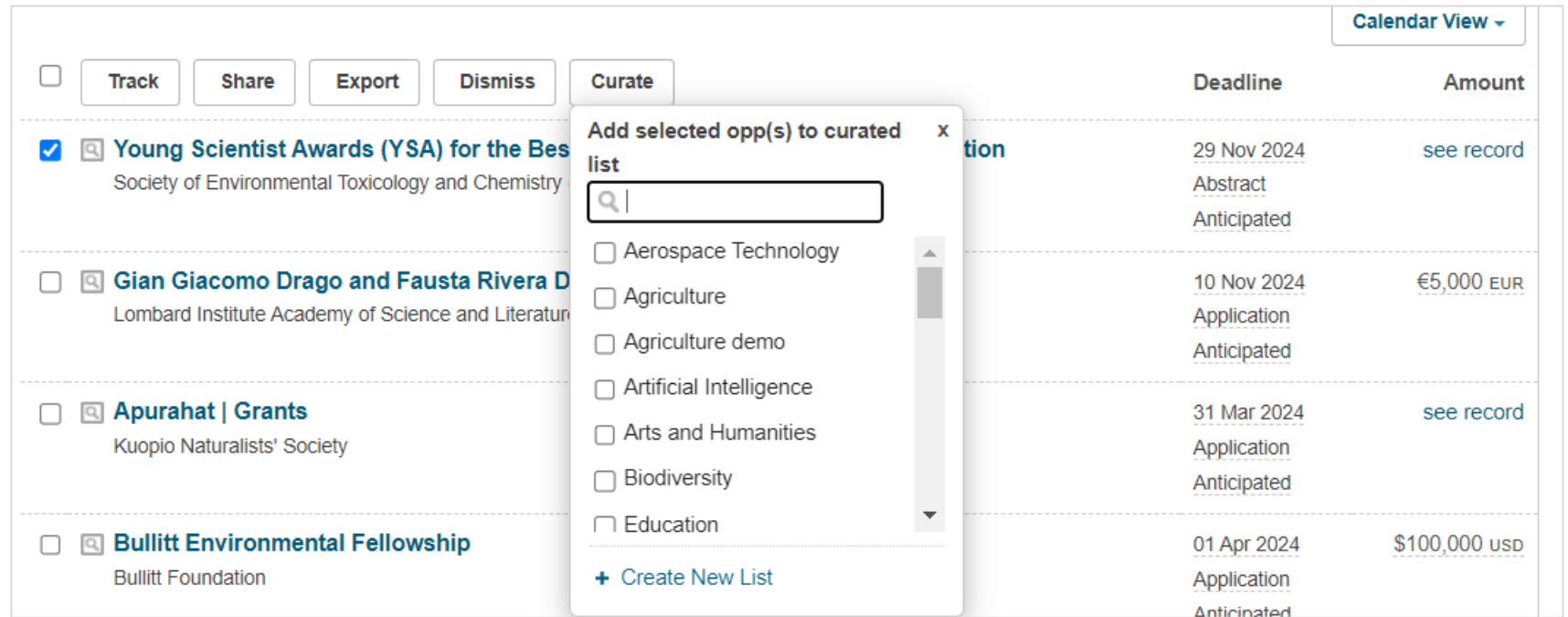
You can add opportunities to any curated lists that you own or co-own

On individual opportunities:
Any curated lists that you own
or co-owned will be shown as
an option



The dialog box titled 'Add to curated list:' features a search bar and a list of categories. 'Environmental sciences' is selected with a blue checkmark. Other categories include Aerospace Technology, Agriculture, Agriculture demo, Artificial Intelligence, Arts and Humanities, and Biodiversity. At the bottom are 'Apply' and 'Clear' buttons.

On search result sets:
The curated lists shown
are both your owned
and co-owned lists




The table displays search results with columns for selection, actions, opportunity details, deadline, and amount. A 'Curate' dialog box is open over the first row.

	Track	Share	Export	Dismiss	Curate		Deadline	Amount
<input checked="" type="checkbox"/>						Young Scientist Awards (YSA) for the Best Society of Environmental Toxicology and Chemistry	29 Nov 2024 Abstract Anticipated	see record
<input type="checkbox"/>						Gian Giacomo Drago and Fausta Rivera D Lombard Institute Academy of Science and Literature	10 Nov 2024 Application Anticipated	€5,000 EUR
<input type="checkbox"/>						Apurahat Grants Kuopio Naturalists' Society	31 Mar 2024 Application Anticipated	see record
<input type="checkbox"/>						Bullitt Environmental Fellowship Bullitt Foundation	01 Apr 2024 Application Anticipated	\$100,000 USD

Managing Shared Admin Ownership for Newsletters, Internal Opps, Embedded Searches

Multiple Ownership of Newsletters

 Reports ▾ Institutional Settings ▾ Groups ▾ Education & Training ▾ Statistics ▾ Tools ▾ Manage Gallery [Manage Gallery](#)

Manage Newsletters

Create a Newsletter

View and manage your upcoming newsletter sends.

View: ☒ Active ☐ Inactive ☐ Past ☐ All


Your Active Newsletters (1) Sort ▾

	Last Edited	Last Sent Date	Next Send Date	Recipients
Engineering newsletter repeats: monthly, on: the first Sunday, in: AM (EST), to: specific groups, starting on: 07 Nov 2023, ending on: 04 Mar 2024 Co-owned by: Kearney, Lita	06 Nov 2023 11:37AM UTC		03 Dec 2023 AM	1 Options ▾

Institution Active Newsletters (2) Sort ▾

COVID-19 Funding Opportunities (All) repeats: weekly, on: Friday, in: PM (EST), to: specific groups, starting on: 18 Jun 2021 Owned by: Branch, Sara	09 Dec 2022 6:19PM UTC	03 Nov 2023 PM	10 Nov 2023 PM	2
Bioinformatics repeats: weekly, on: Saturday, in: AM (EST), to: specific groups, starting on: 07 Jul 2023 Owned by: Branch, Sara	07 Jul 2023	04 Nov 2023 PM	11 Nov 2023 AM	2

Step 6: Add Co-owners (optional)


▼ Co-owners: (1) 

Select or update admins ▾

Bell, Andrew

Epiphaniou, Nick

Clear



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 co-owns 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 co-owners of your internal opportunities as well as an overview over the Institutional Internal Opportunities owned by colleagues

▼ Co-owners: (1) ⓘ

Select or update admins ▼

Clear

★ Krause, Lotte x

Manage Internal Opportunities

View and manage your funding opportunities sponsored by your institution.

Add an Opportunity

Your Opportunities (3)

Sort ▼

	Status	Deadline	Amount	
Medicine grant Co-owned by: Kearney, Lita	Published	15 Dec 2023 Application	\$5,000 USD	edit delete
Philosophy grant Co-owned by: Neuwirth, Eddie • Bell, Andrew	Published	10 Feb 2024 Abstract	£500 GBP	edit delete
Social Sciences Seed Grant	Published	Continuous, no deadline	£500 GBP	edit delete

Institution Opportunities (2)

Engineering innovation seed funding Owned by: Cooper, Nicky	Expired		£20,000 GBP	
---	---------	--	-------------	--

Multiple Ownership of Embedded Searches

Reports Institutional Settings Groups Education & Training Statistics Tools

Create an Embedded Search

Manage Embedded Searches

Use this form to create an iframe html snippet that you can embed on your organizations website.

Step 1: Name Your Embedded Search

General Name 1

This name will display for your users inside the iframe on whichever webpage you embed it.

Step 2: Choose Funding Opps to Share

Select a Curated List or Curated Search to embed

Step 3: Pick the Sort Order for Results Display

☒ Title

☐ Sponsor name

☐ Deadline *soonest > latest*

☐ Amount *highest > lowest*

Step 4: Add Co-owners (optional)

► Co-owners: (1) ⓘ

Step 5: Save Embedded Search

Save

Reset

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



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>

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

- **New customer facing funding API:** Enables customers to extract opportunities data for further integration within their own systems
- **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
- **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
- **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
- **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
- **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

Targeting H1 - In Progress



Select Roadmap Highlights

Customer-facing Enhancements - continued

- **Redesigned public groups pages:** More dynamic and customizable groups pages to make it easier for admins to share content and engage with members
- **Provide statistics for Newsletters:** Allow admins to see how many people have interacted with newsletters
- **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
- **Add ability to view usage reports by departments:** View or sort reports broken down by departments for users with profiles
- **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
- **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 the ability for individuals to limit the visibility of their profile:** Allows individuals to make their profile invisible to anyone but themselves

Targeting H2 - Scoping

Customer Facing Funding API

Available March 1 - If interested request an API Key from Support

PIVOT-RP Funding API

Circulation

Please keep this document confidential. If you would like one of your IT suppliers to be supplied with this specification, please ask them to get in touch with us.

Objectives

Typical use cases supported by the API are:

- Enable a user to search for funding opportunities
- Enable the retrieval of data for a funding opportunity specified by its ID

Contents

- Introduction
- Usage
 - Authentication
 - Errors
 - Pagination
 - Versioning
 - Testing
- Resources
 - Funding Opportunity
 - Funder
 - Discipline
 - Eligibility Profile
 - Region
 - Deadline
- Methods
 - Search for Funding Opportunities
 - Get an Individual Funding Opportunity

port various



- **New customer facing funding API:** Enables customers to extract opportunities data for further integration within their own systems

API Use Cases and Terms:

- Make free text queries to search for funding opportunities
- Search for a specific opportunity using its Pivot-RP opportunity ID
- Returns a JSON formatted output for a specific opportunity or set of results
- Not intended for mass downloads of data
- Requires maintaining a full Pivot-RP subscription and knowledge of using APIs
- Our Support team is not equipped to handle API development questions

Prestige Prizes, Awards & Honorifics

Coming soon - Will start with about 850-1,000 global awards tagged as “prestigious”

<input type="checkbox"/> 1 Result		Sort by	Relevance ▼	Deadline	Amount
<input type="checkbox"/>	<input type="checkbox"/> PRESTIGIOUS Alan T. Waterman Award National Science Board (NSB) National Science Foundation (NSF)			15 Sep 2024 Nomination Anticipated	\$1,000,000 USD



- **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 Professional News Intelligence Report



Now available to download!

Our special report delves into research offices' challenges, opportunities and future direction, produced by the team at Research Professional News.

The report is based on findings from our surveys of more than 800 research office staff and 800 researchers around the world.

Discover the key highlights:

- The top challenges research offices face today
- How AI could benefit the research office
- The changing view of research impact

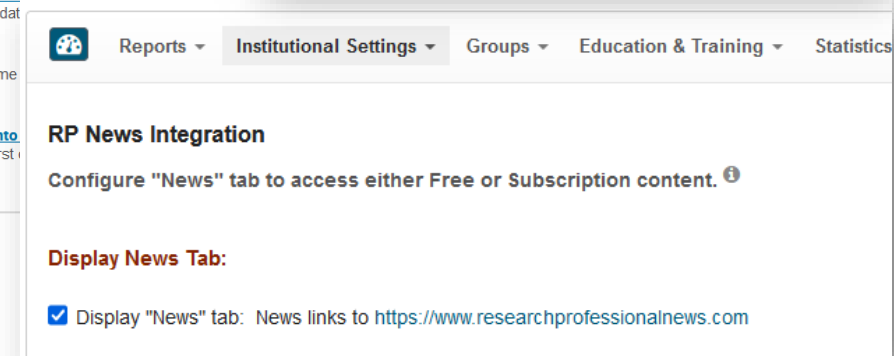
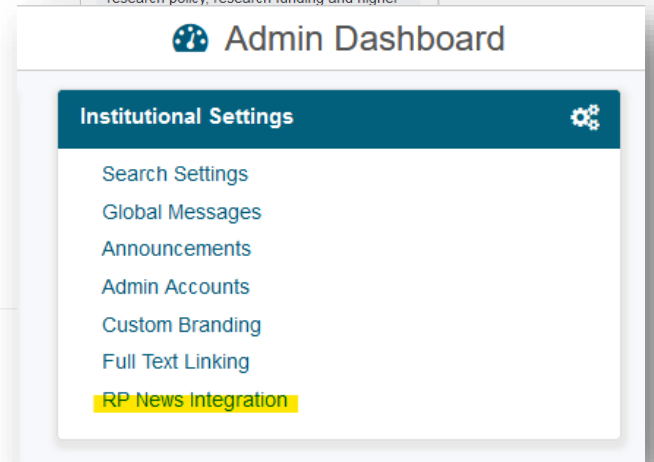
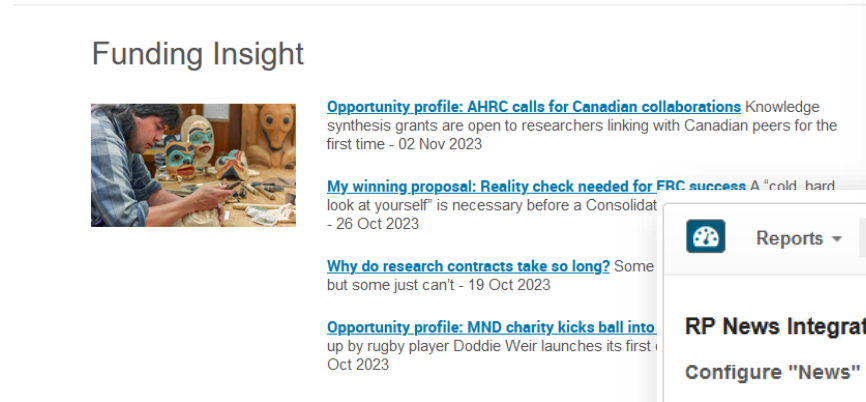
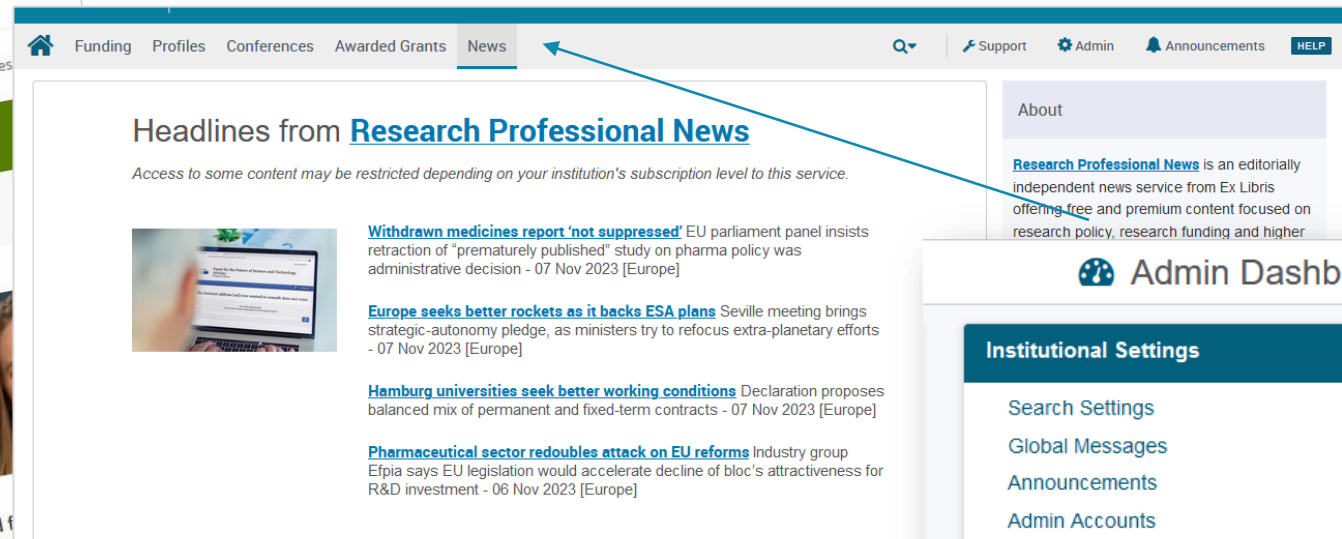
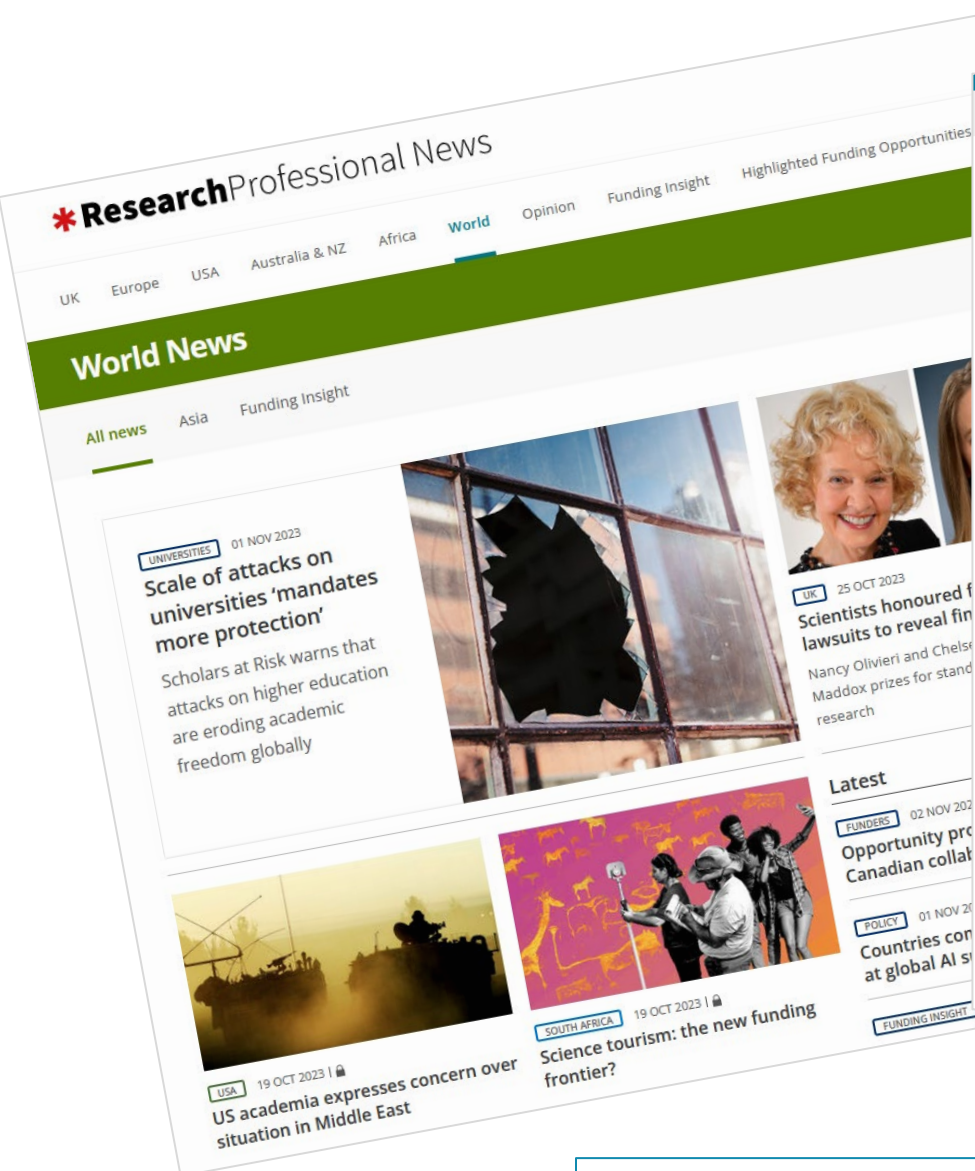
Discover the biggest challenges and opportunities facing research office teams around the world.



https://discover.clarivate.com/Research_Offices_of_the_Future_survey_report_2023

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

<https://researchprofessionalnews.com>



Clarivate Branding Changes and SSO Update

Pivot-RP Branding Updates

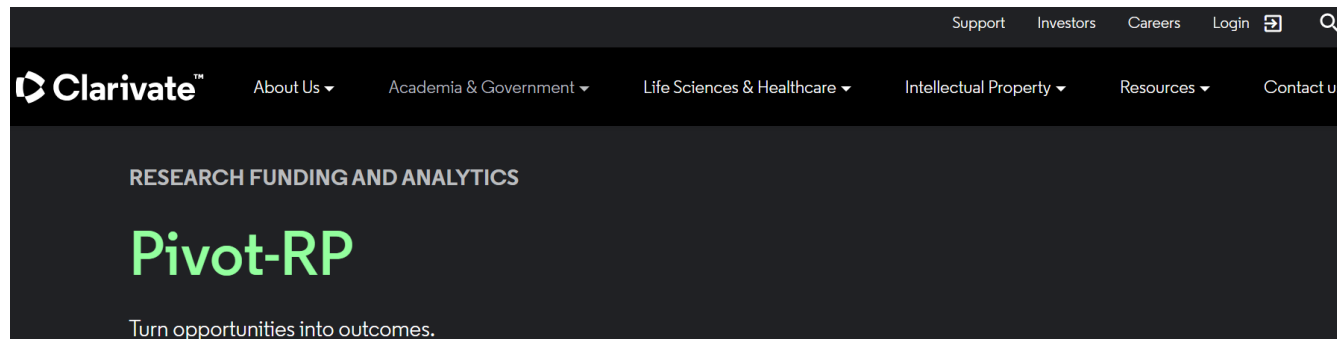
Changes in March 2024 - What you need to know?

What's changing this year:

You will begin to see changes to the look and feel of Pivot-RP marketing web pages, collateral and customer communication emails.

- These changes will not affect your product experience or the support you receive from customer support or the product teams.
- The Pivot-RP user interface will continue to be customizable with your institutional branding.

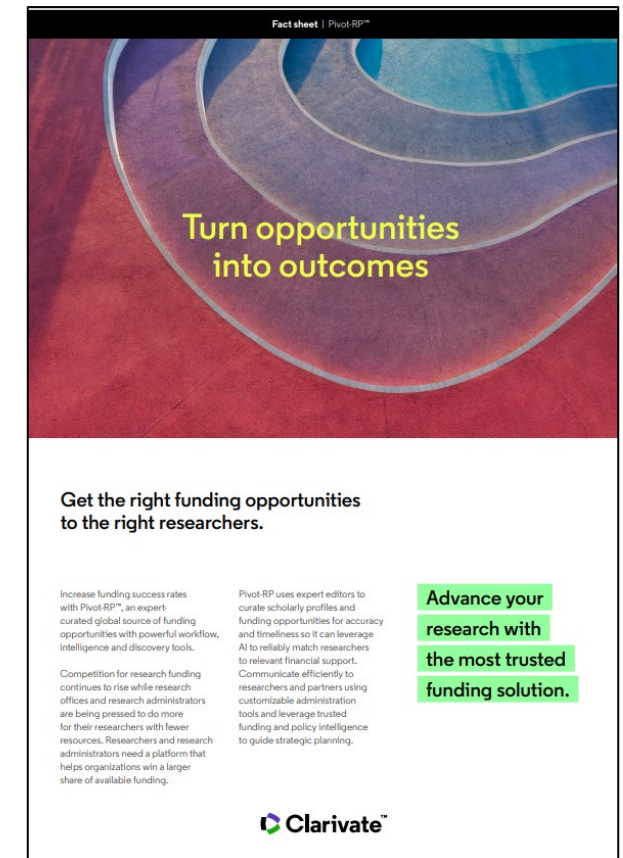
What to expect: In March, we will provide you with refreshed assets you can use to update your internal product marketing and help pages to reflect these changes, including new Pivot-RP materials, links, and logos. Additional changes will be made throughout the year.



New marketing web pages at Clarivate.com



Pivot-RP™



New marketing collateral

Knowledge Center, Training pages and Videos are NOT changing

<https://knowledge.exlibrisgroup.com/Pivot>

Same great resources and help page

Great for onboarding new Admins or researchers.

The screenshot shows the ExLibris Knowledge Center Pivot-RP page. At the top, there's a navigation bar with the ExLibris logo, 'Part of Clarivate', and links for 'More Sites', 'System Status', and 'Submit a Case'. Below this is a search bar and a 'Pivot-RP' button. The main heading is 'Welcome to Pivot-RP', followed by a welcome message and a list of benefits: 'Accelerate Your Research Funding with Pivot-RP'. The page features six tiles: 'Product Documentation', 'Release Notes', 'Training', 'Product Materials', and 'Knowledge Articles'. A blue arrow points from the 'Training' tile to the right-hand page.

ExLibris Knowledge Center
Part of Clarivate

Search under current path

Home » Pivot

Welcome to Pivot-RP

Welcome to Pivot-RP. On this page you will find the most up-to-date information and resources for Pivot-RP broken down into easy to navigate sections.

Accelerate Your Research Funding with Pivot-RP

- Search the most trusted and comprehensive source of global funding information
- Save searches and track funding opportunities
- Discover collaborators
- Get tailored funding recommendations and alerts
- Gain insights from previously awarded grants
- Inform your funding strategies with our authoritative global funding news and analysis service

If you wish to contact or chat with our Support team, use this [form](#).

Product Documentation

Access the latest documentation for Ex Libris products

Release Notes

Stay informed about the features and capabilities included in each product release

Training

Learn the essential components and workflows of Pivot-RP, which will help you discover research funding opportunities.

Product Materials

Learn more about product resources and materials to better serve your product needs

Knowledge Articles

Answers as provided by our product analysts, to commonly raised questions.

The screenshot shows the 'Training' page. It has a title 'Training' and a sub-header 'All the training videos below are newly designed.' Below this are six tiles: 'Getting Started with Pivot-RP', 'Working with Pivot-RP Funding Opportunities', 'Working with Pivot-RP Profiles', 'Sharing Content with Pivot-RP Groups', 'Searching Awarded Grants and Conferences', and 'Pivot-RP Admin Essentials'. At the bottom is a section for 'Recorded Training Webinars and Slides'.

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.

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.

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.

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 interests.

Searching Awarded Grants and Conferences

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

Pivot-RP Admin Essentials

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

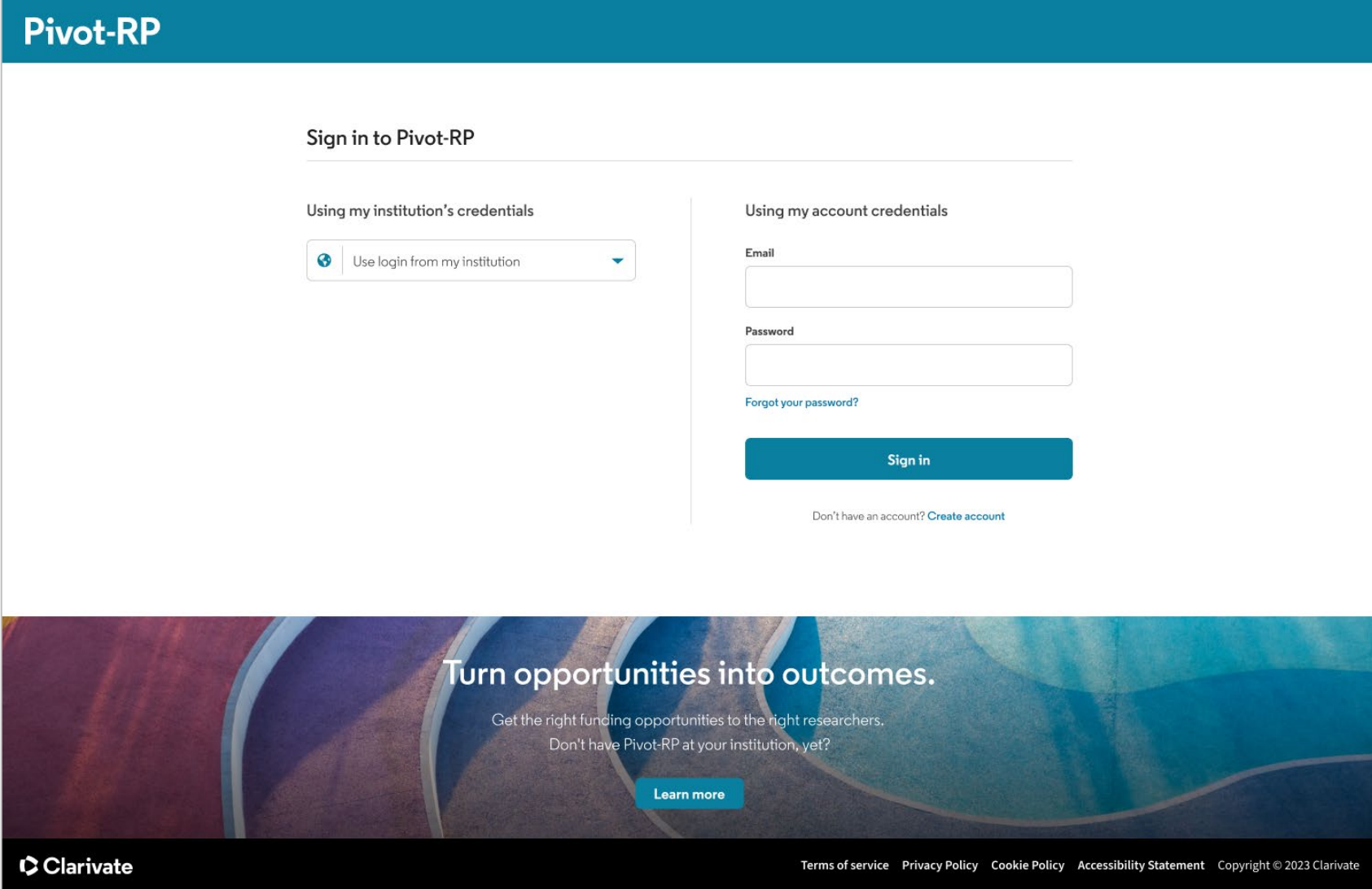
Recorded Training Webinars and Slides

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.

Minor Product Updates will Align with Branding

Coming Soon

- Modified public-facing login screen
- Updated Clarivate branded footer
- New slightly modified Pivot-RP logo



The screenshot displays the Pivot-RP login interface. At the top, a teal header bar contains the 'Pivot-RP' logo. Below this, the heading 'Sign in to Pivot-RP' is centered. The login form is divided into two columns. The left column, titled 'Using my institution's credentials', features a button with a globe icon and the text 'Use login from my institution'. The right column, titled 'Using my account credentials', includes input fields for 'Email' and 'Password', a 'Forgot your password?' link, and a teal 'Sign in' button. Below the button is a link for 'Don't have an account? Create account'. The bottom of the page features a large banner with the text 'Turn opportunities into outcomes.' and 'Get the right funding opportunities to the right researchers. Don't have Pivot-RP at your institution, yet?'. A 'Learn more' button is positioned at the bottom right of the banner. The footer contains the Clarivate logo on the left and a row of links (Terms of service, Privacy Policy, Cookie Policy, Accessibility Statement, Copyright © 2023 Clarivate) on the right.

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 better allow customers to use their Institutional login credentials.

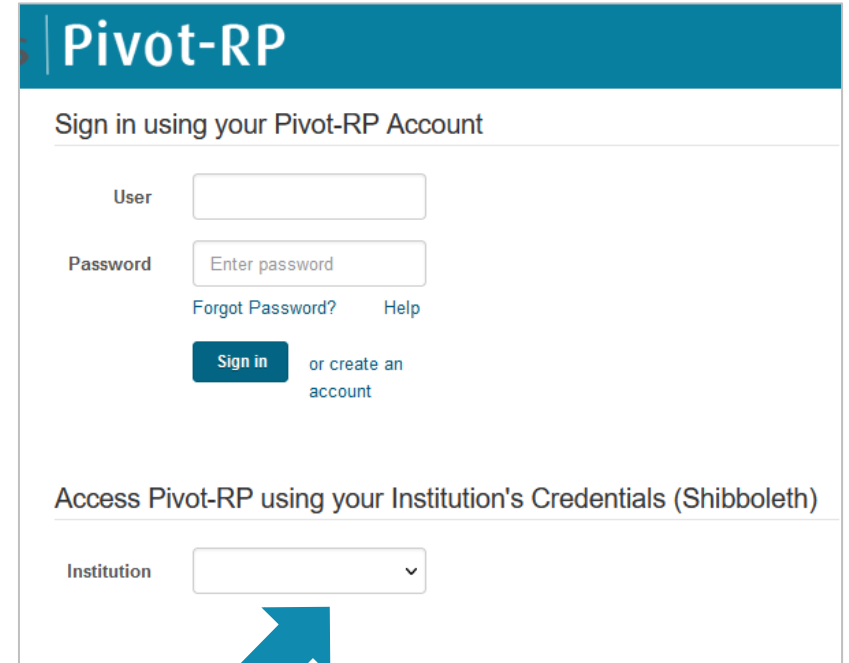
All customers who were configured for SSO/Institutional Login prior to April 2023 will be migrated over from our previous SSO service to the new SSO service through the first half of 2024.

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, you will receive direct communications via email from our team with any instructions or requests for information. We may need to coordinate with your IT team to make a minor configuration change on your systems back end.

- Be on the lookout for any communications we might send related to SSO to ensure that you don't experience any disruptions to your ability to use Institutional login.
- Let your IT team at your institution know about this upcoming change so we can quickly get the new SSO authentication implemented.

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.





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

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