

Pre-requisite: Suggested pre-requisite –Pivot Account Creation and Profile Updating (users should know how to log in to Pivot prior to session)

Module length: 1 hour (1 hour 20 minutes with questions)

Module objective: At the end of this module users will be able to run a quick and advanced funding search in Pivot. Users will also be able to save individual opportunities and entire searches, share individual opportunities and set up tags.

Materials: Pivot Funding PowerPoint presentation, access to Pivot, and a researcher account.

Pivot Funding Overview

Note: Use Pivot Funding Homepage PowerPoint for this section, slides 1-5

Review agenda for session and discuss slide #3 “Pivot Funding Overview”

Pivot Funding Home Page

Note: the majority of the rest of the presentation will be conducted live from the Web

This part of the presentation will broadly cover the Pivot Funding page and assumes that attendees are familiar with how to access Pivot with or without logging in

- Mention that on-campus users can search Pivot Funding (and Profiles) without being logged in to their account, but in order to save, track, monitor, and share funding opportunities or funding searches, they will need to log in
- Explain top picks from the Editorial Team
- Cover Funding News (left side of the page)

Quick Searching

- **Search by Text** - This is a quick text search that will search the entire Funding database for your specified terms
 - Found at the top of the page; default view is the Search by Text
 - Mention that text search (aka “quick search”) accommodates Boolean searching, wildcards, and proximity
 - Explain default activity location and citizenship/residency location (if set by the Research Administrator for the institutional subscription)
 - Point out that when two words are entered without quotation marks identifying it as an exact phrase, Pivot will join the words with “or” (in the Advanced Search it will join the words with “and”)
 - <https://pivot.desk.com/customer/portal/articles/947163-funding-search-tips> has useful tips for both the Text search and Advanced search.
- Enter a word or phrase and hit “search” to show how this feature is carried out (*Recommendation: Wait until after going through the Advanced Search to elaborate on the search results page*)
 - Return to Funding Home Page

- **Search by Sponsor** - An easy way to see all current funding opportunities offered by a particular sponsor
 - Click the Search by Sponsor option at the top to switch views
 - Type a Sponsor's name in the search box to search for that sponsor
 - Click on "All Sponsors" to see the full list of sponsors in the funding database
 - Type a Sponsor's name in the search box to search within this list or click on a letter to see all sponsors with names that begin with the letter (*Note: only sponsors with active funding records will be hyperlinked. If you see a name that is not hyperlinked it means that the sponsor does not have anything currently open.*)
 - Click US Federal Sponsors or Non-US Federal sponsors to change view (use letter searching and search box as before)

Advanced Search

- Click on "Funding" Tab to return to Pivot Funding Home
- Click on "Advanced Search"
 - Remind users that a pre-defined activity location and/or citizenship or residency value may have been set by the local Pivot Research Administrators
 - User can de-select these options and set other options (explained shortly)
- Explain what each of the search terms means
 - All fields - full text searching across all available text fields (including Title, Abstract, Keyword(s), Applicant Type, Citizenship, Funding Type, Activity Location, Sponsor Type, Sponsor, Opp ID, and Agency). If there is a term or concept for which you are searching but are uncertain exactly how it would be used, or in which field(s) it would appear, you may wish to try searching for it in All Fields
 - Can use Boolean, quote marks, wild cards, and proximity searching
 - Entering multiple terms in a single search box will join the words together with "and" (which is the opposite of the Quick Search which joins the words with "or")
 - Amount - can be searched to identify opportunities for an exact amount of funding or for more (or less) than a designated amount. To search the Amount field, first select either "More than" or "Less than" from the drop down menu. Then enter the desired amount. **Do not use dollar signs or commas**
 - Deadline - Search for deadlines within the preset options listed or select from the calendar. You can enter a specific date using the 'on' option, after a specific date using 'on or after', or before a specific date using 'on or before'. Combine an 'on or after' date with a 'on or before' date to specify your own deadline date range
 - Limited Submission - There are two choices here: *Limited Submission* = For some opportunities, sponsors accept only a specified number of proposals or applications from an institution. This checkbox limits your search to just those opportunities. *Other Internal Coordination Required* – Limits your search to include opportunities that require some coordination at the university level prior to the sponsor deadline. This might be a ranking requirement, a limit on the number of times an applicant may submit, or some other special requirement by the sponsor
 - Activity Location – Identifies any requirements about where the grants may be used. To limit your results by activity location(s), begin typing in the search box to find a matching location from the list of countries, political regions, geographic groups and continents. Select a location of interest from the

suggested list. Or, you can browse the list by clicking on the `more locations` link to view a list of locations. If you wanted to stay in your lab in Nevada, you would want to select Nevada as your Activity Location. If you wanted to travel to South Africa, you would select South Africa

- Citizenship or Residency - Defining a search using the Citizenship field will return all funding opportunities available specifically to citizens or residents of the chosen country(s). By default, the results will include funding opportunities that are “unrestricted” (sponsor specifically does not limit based on this criterion) or “unspecified” (sponsor does not indicate that there is or is not a limitation on this criterion). You can uncheck either unrestricted or unspecified if desired. To select more than one option in the pick list, hold down the Ctrl key on your keyboard (the Apple key for Mac users) and use your mouse to click
- Funding Type – The Funding Type field describes the type of activity or activities a Sponsor is willing to support for a particular Funding Opportunity. You can select multiple funding types by clicking on those you wish to include in your search query. The Funding Type pick list is as follows:
 - *Artistic Pursuit*: funding for the presentation of artistic work, for example a performance, exhibit, or film or video production
 - *Collaboration or Cooperative Agreement*: funding for any collaborative activity between people working at two or more institutions or in two or more disciplines
 - *Contract or Tender*: funding for an agreement to conduct a specific project or task with stated outcomes (as opposed to a general research effort or program development)
 - *Dissertation or Thesis*: funding for research or other activities related to the completion of a doctoral dissertation or graduate thesis
 - *Equipment or Materials Acquisition or Facility Use*: funding targeted toward the purchase or use of equipment, materials, or special facilities required to conduct research. Included would be the purchase of computer equipment, payment for the use of a facility's telescope, leased time on a supercomputer, use of library facilities, or special collections and use of art facilities (colonies, studios). Not included would be general expenses related to research.
 - *Facility Construction or Operation*: funding to construct, remodel, or operate a facility
 - *Meeting or Conference or Seminar*: funding to either attend or organize a meeting, conference, or seminar
 - *Postdoctoral Award*: funds for individuals who have recently received PhDs to perform research or study, usually under the guidance of a mentor, but sometimes not in the humanities or social sciences
 - *Prize or Award*: monetary or other awards presented in recognition of past or current accomplishments in the arts, sciences, or humanities
 - *Program or Curriculum Development or Provision*: funding to develop or provide a program to benefit the public, or to develop or provide a curriculum, a course, or other types of training or instruction for the public or for those in a traditional educational setting
 - *Publishing or Editorial*: subvention for publication costs of journals, manuscripts, texts, documents, and translations of works
 - *Research*: funding for activity that increases overall knowledge about a field
 - *Training or Scholarship or Fellowship*: funding in the form of scholarships, internships, fellowships, or specialized training that advances the individual's knowledge of the area, not the area itself

- *Travel*: funds for travel expenses arising from programs or activities such as (but not limited to) visiting lectureships or professorships, exchange programs, on-site observation, or research activities
 - *Visiting Personnel*: funding to either be or host a visiting expert
- Keyword - the Keyword field utilizes the Pivot keywords, a large body of controlled vocabulary terms which succinctly describe the areas to which Funding Opportunities pertain. You can either search for matching keywords from the list or browse the keyword hierarchy. To search, begin typing in the search box. If there is a match, a list of matches from the keyword list will display below the search field. Click on the matching term that best represents the context for your topic of interest. To browse the full list, click on the 'browse' link to open up the browse box. The keyword list is organized hierarchically. Use the folder expanders to open folders to view lower in the hierarchy. Click on the keyword to add it to your list
 - Applicant Type – The Applicant Type field describes who the applicant must be to be eligible for a particular opportunity. Please note that this field identifies those applicants who qualify *for* a Funding Opportunity rather than Funding Opportunities *about* a certain type of individual. To select more than one option, simply click on the Applicant Types. Making no selection will leave this field out of the search query

The Applicant Type pick list is as follows:

- *Academic Institution*
- *Commercial* (any business or corporation)
- *Government*
- *Graduate Student* - anyone currently in graduate school working on a master's degree or doctorate but who has not yet received a doctorate; also appropriate for undergraduate students looking for funding for upcoming graduate studies
- *Minority* - opportunities for which minorities ONLY may apply; this includes minority institutions or minority-owned businesses; for U.S. sponsors, minority is defined in terms of U.S. government guidelines or standards; likewise for non-U.S. opportunities those countries' national guidelines or standards are applied
- *New Faculty/New Investigator* - denotes experience and encompasses professionals at various levels considered "inexperienced" or "emerging." "New" does not denote an age or age range. Such opportunities include postdoctoral awards; new, young, emerging, and early career investigator awards; or junior faculty awards. The requirement is used across all disciplines within the Pivot Funding database. For example, an emerging artist award will be classified as "New Faculty/New Investigator"; as will a young investigator award for cardiopulmonary chest medicine. Use of the requirement is based solely on the sponsor's listed criteria
- *Nonprofit*
- *Persons With Disabilities* - opportunities for which disabled individuals ONLY may apply
- *PhD or MD or Other Professional* - anyone who has a doctorate or is considered a professional in his or her field without having a doctoral degree, e.g. artists, architects, lawyers, journalists, nurses, librarians, etc.
- *Small Business* - includes all Small Business Innovation Research [SBIR] opportunities, Small Business Technology Transfer [STTR] opportunities, and small business set-asides
- *Undergraduate Student* - anyone currently in school working on a bachelor's degree

- *Women* - opportunities for which women ONLY may apply
 - Sponsor Type - The Sponsor Type field contains the classification of a sponsor for a Funding Opportunity. You can select multiple sponsor types simply by clicking on those types you wish to include in your search query
- Explain Exclude
 - Mention that you have the option of excluding several search fields from any search in the Advanced Search (*Example: If you wanted to exclude opportunities for Graduate Students from your search, select "Graduate Students under Requirements in the exclude box"*)
- Explain Match All/Match Any
 - By Default your search is set to "Match All" of the fields. This means that your different search criteria will be connected by an "AND" and will result in a more narrow search. If you change the default to "Match Any" your search criteria will be connected by an "OR" and will result in a broader search
- Give some suggestions how to structure a search (*for suggestions visit: <https://pivot.desk.com/customer/portal/articles/947163-funding-search-tips>*)
- **Run a Search**
- Explain the results page
 - By default, results are sorted by relevance. To re-sort the page click on the Sort dropdown at the top of the results list
 - Talk about the faceted search results on the left side of the page that enables you to see the top results from a few categories. Also point out Activity Location/Citizenship and Residency pre-set filters and how to remove them from search results (which may change the number of opps in the search results list)
 - Explain Clickovers – by clicking on the icon of a magnifying glass you will see the abstract of the funding opp, clicking on the deadline date will show you information about the opp's deadlines, and clicking on the amount listed will give you information about the amount of the opp
- Select an opportunity from the search results list and click on the title to display the full opp
 - Run through the various parts of the funding opp
 - Be sure to highlight the items on the right side of the page:
 - Tracked/Active/Share – Pivot will tell you if that opp is being tracked on your Tracked or Active list, or if you've shared it already. If you haven't, you can complete any of these tasks by clicking on the applicable action
 - Users will be given the opportunity to assign record tags before saving to a tracked or active list. **Note: Record Tags will help you organize your saved opps. You will be able to create a new tag or use an existing tag when putting an opp on an Active or Tracked list**
 - Track an opp on either Tracked or Active list
 - Click "Share" and demonstrate how to share an individual opportunity
 - Show how to enter an e-mail address. Hit Tab to add multiple e-mail addresses
 - Potential Collaborators – matches the information in a funding record to Pivot profiles for individuals inside and outside the same university
 - Potential collaborators are selected based on Pivot analyzing various parts of the funding opportunity and also analyzing various parts of the profiles – it is not a straight keyword to keyword match
 - Show Deadline section at the bottom; admins can set internal deadlines and input notes for specific opps
- Return to Results Page and cover results page actions

- Show users how to select a few records (using the checkbox to the left of the record name) and put multiple opps on Active List or Tracked List right from the results page
 - Users will also be able to tag records from results list
- Mention different export options
 - Show how to Export details from several records. Select format, content and hit “Download”
- Show how to share multiple records with others by clicking “Share.” This will work as the sharing feature did from the individual record
- Return to Results Page and Cover links at the top of the page
 - Your query is listed at the top
 - Advanced Search - takes you to a new advanced search page
 - Save Search
 - Explain how Funding Alert Works and that they can save unlimited searches to their home page
 - Name the search and choose to receive weekly e-mails about this search (**Note: users will receive an e-mail (generally on Monday depending on time zone) if there are any new opportunities that match the specified search criteria or if any opportunities matching the search criteria are updated**)
 - Return to the Home Page and click on “Saved Searches”
 - Click to see full list of searches to see the search that you just saved
 - Refine Search – a way to narrow or broaden your search without having to re-create it. The Advanced Search will open and users will see the search criteria that they have already specified. They can add or take away criteria

Summary

Note: Use Pivot Funding PowerPoint for this section, slide 5

This session covered:

- The Pivot Funding Home Page
- Quick, Sponsor and Advanced Searching
- Navigating Funding Records
- Putting Records on Active and Tracked List
- Sharing Records
- Saving searches
- Detailed help information and webinars (upcoming and recorded) are available in the Help area of Pivot

Thank you!