Custom Branding Guide

May 2022

How to customize the new Pivot-RP UI using the *NEW* Custom Branding tool

This document is organized into two overview sections:

- ***What can be customized***
- ***How to customize*** and preview Pivot-RP using the custom branding tool

The Pivot-RP customizer/preview tool is highly intuitive.

You can experiment with the tool and use the preview function to get a feel for what is possible without impacting your end-users. Use this guide as a reference.

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What can be customized?

Primary Areas that Can be Customized

1. Add your own logo

2. Add a custom link that users will go to if they click your logo

3. Change the header color and search button color (primary color)

4. Change the accent colors for the help link and home icon (secondary color)

5. Add up to two additional Custom links in the header

6. Upload your own background image for the home dashboard page

7. Modify the content in the right-hand 'tips & resources' panel of the home page (which can include text, links, images and HTML styling)

8. Choose to use the primary or secondary color for limited submission or internal opps highlights

- …and more

These items are all visible on the Home Dashboard Page which all users see

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Additional Areas that Can be Customized

9. Add a custom favicon icon to highlight your Internal opportunities

10. Choose the color (or image) for the background area of the search landing pages for funding, profiles, conferences and awarded grants

11. Add a custom logo for Weekly Funding Alert emails (optional)

12. Add a custom logo for Newsletter emails (optional)

Things to keep in mind:

- You can choose to configure any (or all) of these features – branding is optional

- You can change your mind and modify or update customizations at any time (changes update instantly)

- No IT or web design or coding skills are required

- You can easily re-set the branding to the Pivot-RP defaults at any time

- You can always preview any changes you make before they go live

Feel free to have fun and experiment until you find something that works for you

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Home Dashboard with default branding

Custom branded example

Highly customisable user interface examples

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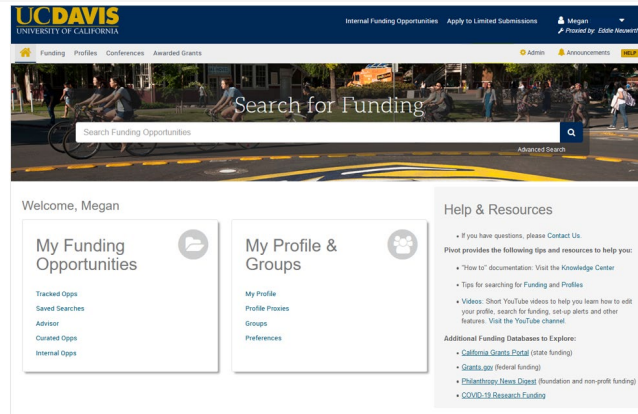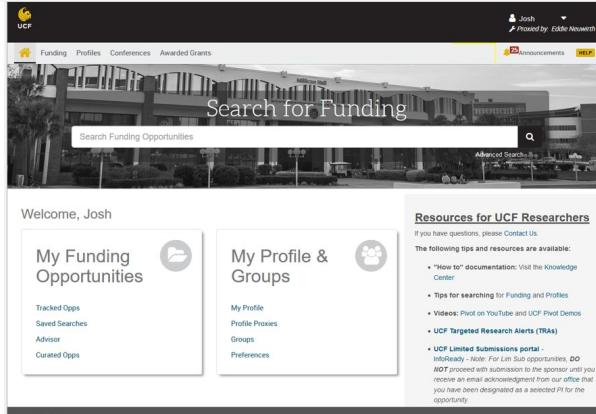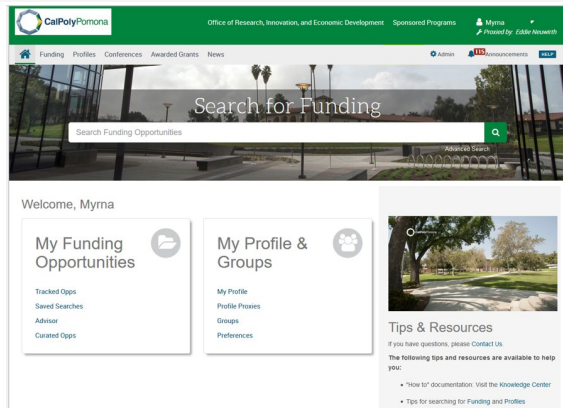
Primary areas that can be customized

Choose a primary header and search button color

Add up to two custom links

Add a custom logo

Choose secondary accent colors

Choose an alternate background image

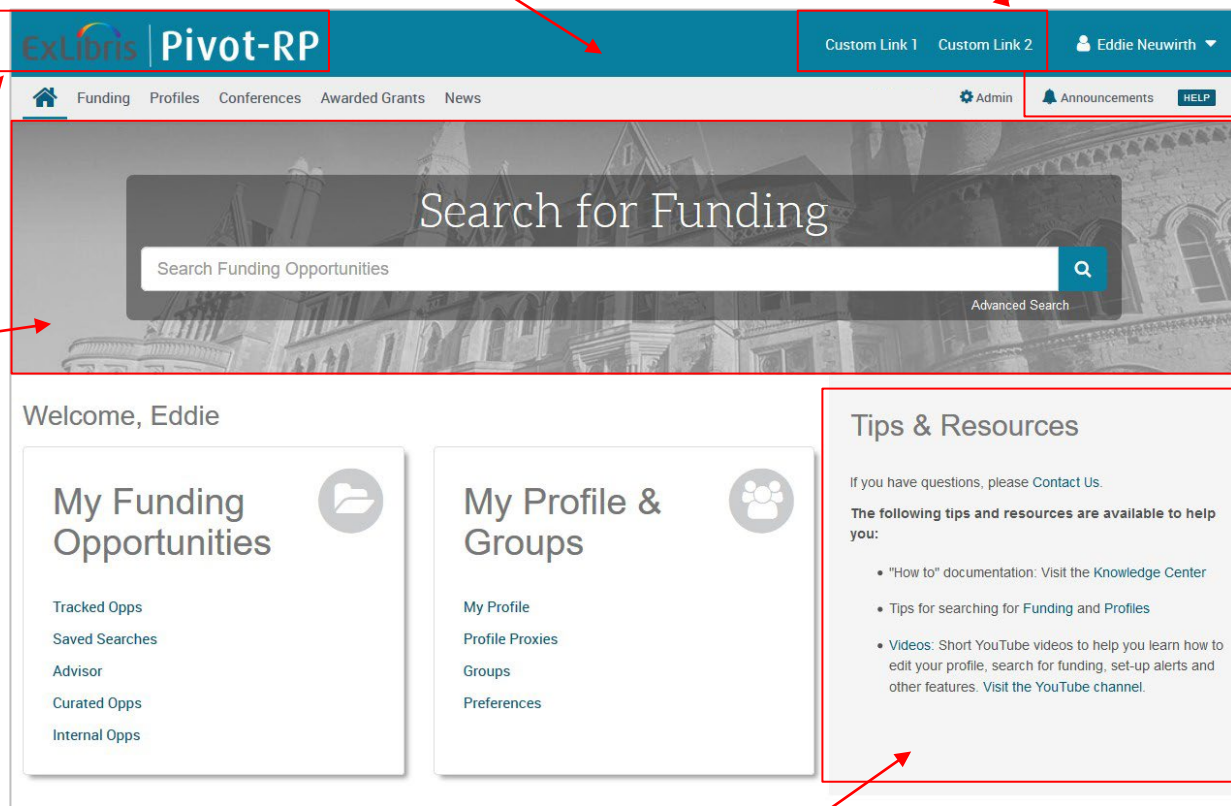This section can include custom text, html, links and images; and you can modify the text colors

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Custom Link 1 Custom Link 2 Eddie Neuwirth

Funding Profiles Conferences Awarded Grants News   Admin Announcements HELP

Search for Funding

Search Funding Opportunities

Advanced Search

Welcome, Eddie

My Funding Opportunities

Tracked Opps
Saved Searches
Advisor
Curated Opps
Internal Opps

My Profile & Groups

My Profile
Profile Proxies
Groups
Preferences

Tips & Resources

If you have questions, please Contact Us.

The following tips and resources are available to help you:

- "How to" documentation: Visit the Knowledge Center
- Tips for searching for Funding and Profiles
- Videos: Short YouTube videos to help you learn how to edit your profile, search for funding, set-up alerts and other features. Visit the YouTube channel.

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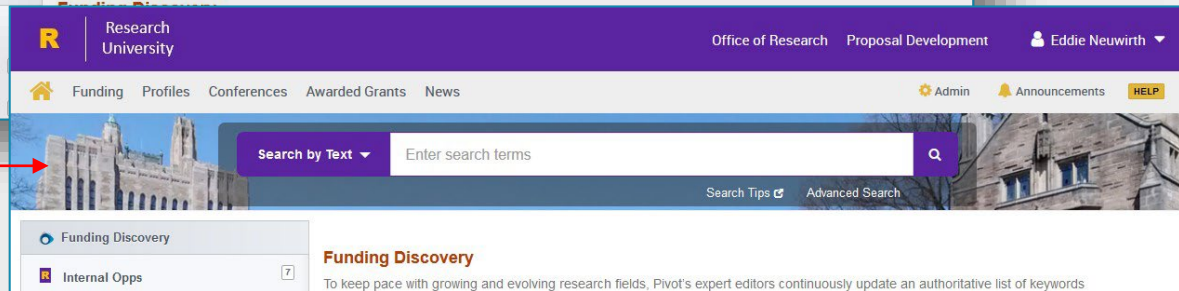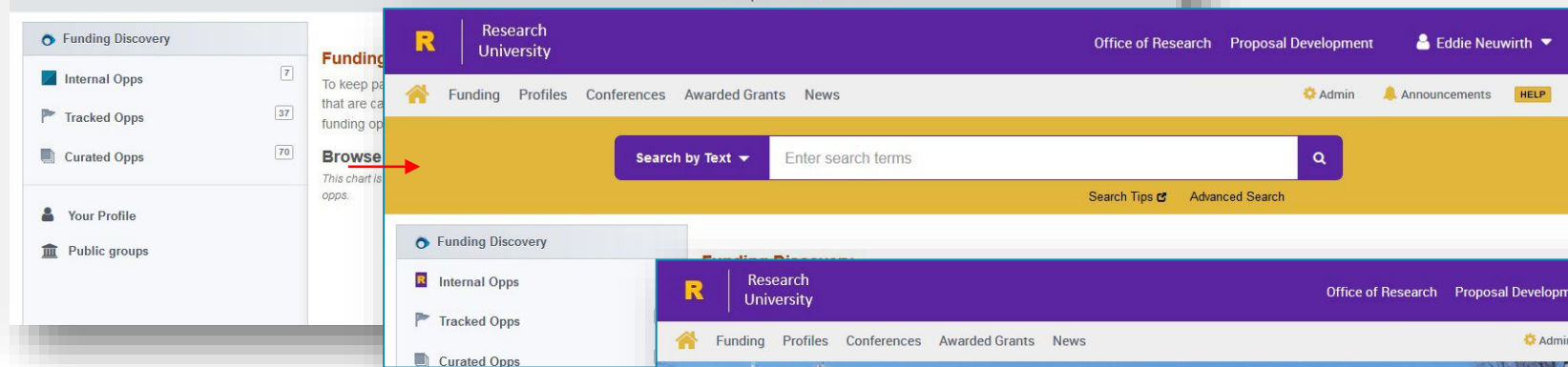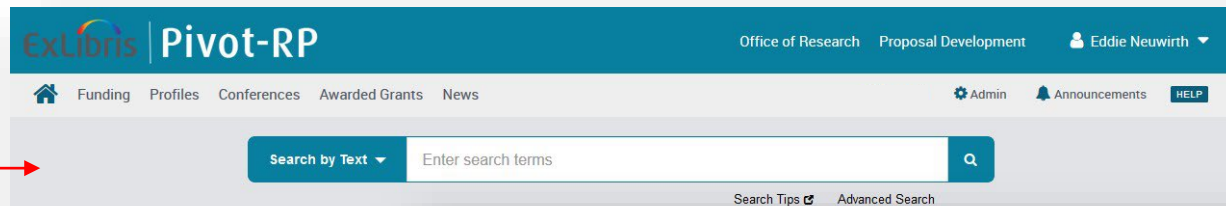
Search page customization

You can choose a search box background color for the primary search pages (Funding Discovery, Profile Discovery, Conferences, and Awarded Grants)
- The default color is gray

Load a custom favicon icon to highlight your internal opportunities (by default this will be a mix of your primary and secondary color choices)
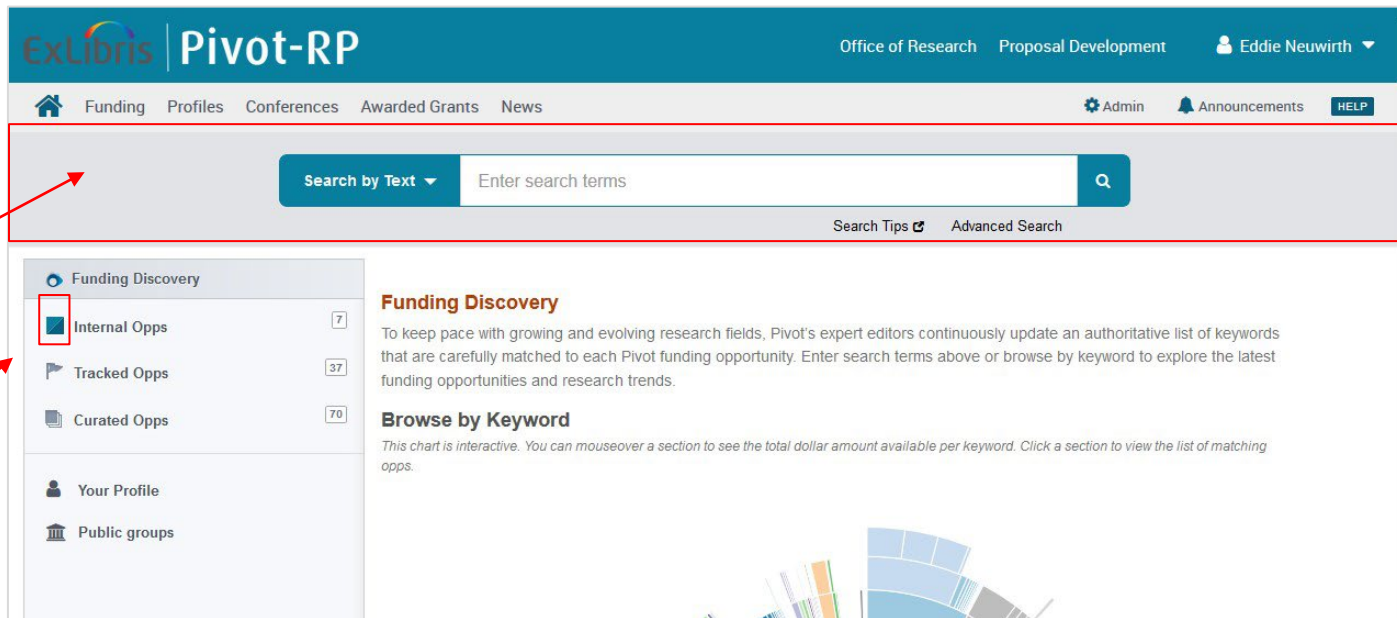
Search page customization

For the search box background color you can choose from the following:
- **default gray**
- **your secondary color**
- **your home dashboard image**
      (Note: this is a compressed version of the image)

Funding Alert email customization

Custom header/logo

Default header/logo

By default the weekly funding alert emails will use your custom logo and colors from the header branding. If desired, you can replace this with a custom logo.

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Newsletter email customization

Default header

Custom newsletter header/logo

By default, newsletters will use your custom logo and colors from the header branding. If desired, you can replace this with a custom logo just for newsletters

How to use the custom branding tool

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Custom Branding Settings

- In the Admin Dashboard →
  Institutional Settings menu,
  select Custom Branding to get to
  the customizer tool
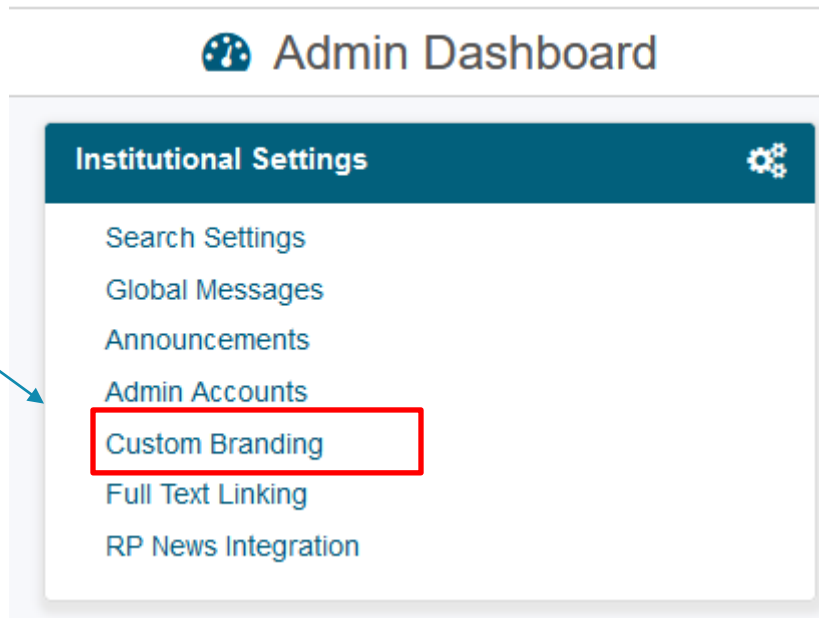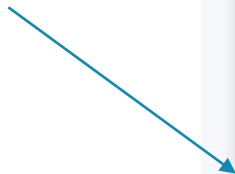
Custom Branding page basics

- The branding tool is a single Admin page broken into clear sections with prompts to enter or upload the information needed

- An information icon (i) next to each item provides additional detail about where that item appears in the UI and offers size recommendations for images

- At the bottom of the page you can **"Preview" the customizations** that you have made to see what the interface will look like with your selections

- **If you want to save the changes you've made select "Save" otherwise the next time you return to Pivot-RP you will have to start over with the defaults**

Logo Settings

Custom Branding

Use the options below to customize the branding for your institution. Your changes will not be saved until you click "Save Changes" at the bottom of this page. Be sure to preview your changes. You may revisit this page and change the branding options at any time.

Logo Settings

Institution Logo ⓘ

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➕ Select Image...

Logo URL   URL to link to when user clicks the logo in the top header bar.

http://www.pivot.proquest.com

Funding Alert Email Logo ⓘ

➕ Select Image...

Newsletter Email Logo ⓘ

➕ Select Image...

Replace the standard Pivot-RP logo with a logo of your choosing

Tips:

- The logo is automatically depicted on the primary background color. You may wish to jump to the color settings section first to pick your header color if you want to see what your logo will look like with your color selections

- Try to use a logo that is no more than 80 pixels high. Pivot-RP will automatically re-size logos to fit the header space. A larger logo may not look good

- Add a Logo URL if you want users to be able to link from your logo to another page.

You can also upload different custom logos for Funding Alert and Newsletter emails. You only need to upload a separate logo for Alert and Newsletter emails if you desire a different look and feel from your header branding. **By default, Alerts and Newsletters will use the same logo and colors as the header.**

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Color Settings

Color Settings

Disclaimer: By using this feature, you are responsible for making sure the colors meet the WCAG AA standard.
Use this free tool to check your colors: WebAIM: Color Contrast Checker

Primary Color ⓘ

#097f9f	✎

☐ Use primary color for limited submission and other highlights

Secondary Color ⓘ

#0a5f7e	✎

☑ Use secondary color for limited submission and other highlights

Internal Funding Icon / Favicon (16x16) ⓘ

[◣]

[+ Select Image...]

Search box background color ⓘ
☑ Use default (Gray #E2E3E7)
☐ Use secondary color selected above
☐ Use home background image (note image will be compressed to fit space)

You can also use the secondary color or home background image to fill the search box background area for the search landing pages. By default this area is gray.

Choose your primary and secondary colors

- Primary color is used for the header background color and search buttons

- Secondary color can be used for accent colors like the help link, home dashboard icon and limited submission pills

You may also choose whether to use your primary or secondary color to highlight limited submission opportunities
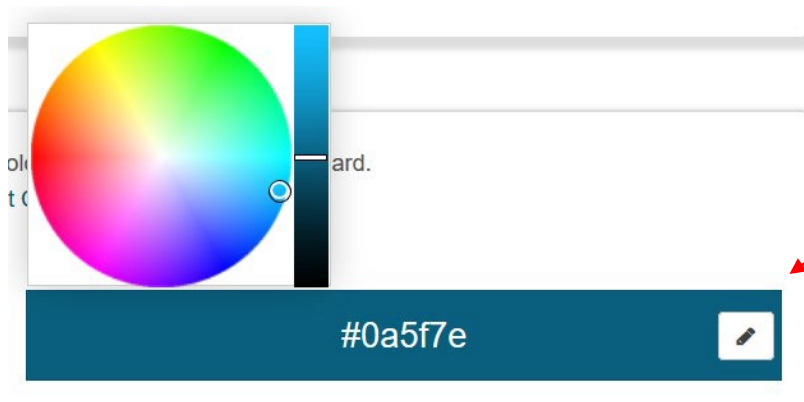
LIMITED **Incitec Pivot Fertilisers Service to Industry Award**
Cotton Research and Development Corporation (CRDC)

INTERNAL **Proquest Funding Opportunity**
ProQuest

Choosing a Color / Internal Opps Favicon

#0a5f7e

You can enter a Hexadecimal number directly in the color bar, or select the pencil icon to activate the built-in color picker

Internal Funding Icon / Favicon (16x16)

+ Select Image...

Internal Funding Icon / Favicon (16x16)
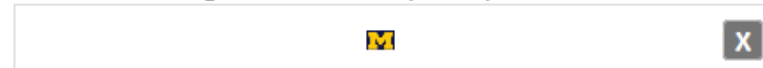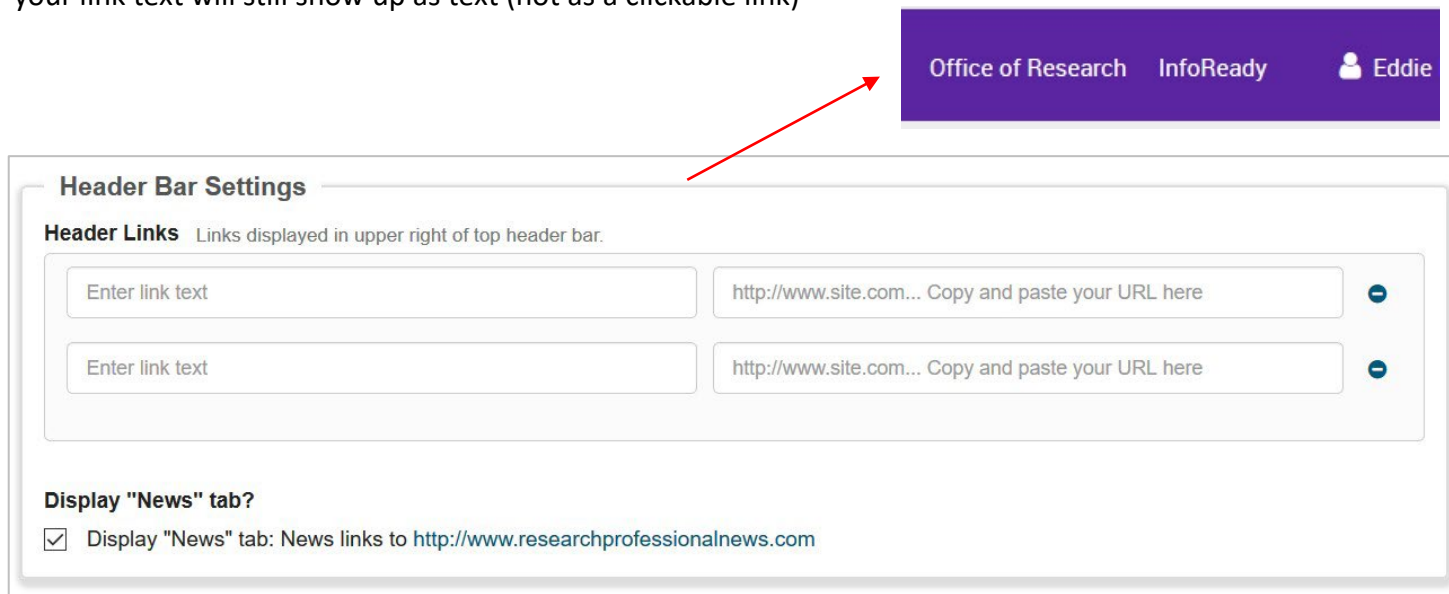
Replace Image...   File: Mfavicon.jpg

The internal funding favicon will by default take on the colors of your primary and secondary color. Or, you can upload your own icon/logo.

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Custom Header Links

You can add up to 2 custom links to your header. Enter the text you want to see on screen in the left input box and provide the URL on the right. You can just leave the custom links fields blank if you do not want any links to show up on the interface.

Tip: You can use this feature to add some informational text to your header. If you leave the URL field blank your link text will still show up as text (not as a clickable link)

Activating the RP News tab

Activate the "Display News" checkbox to add the Research Professional "News' tab to the Pivot-RP navigation menu. The News link will take users to a page where they can get to our free ResearchProfessionalNews.com funding insights and analysis content.
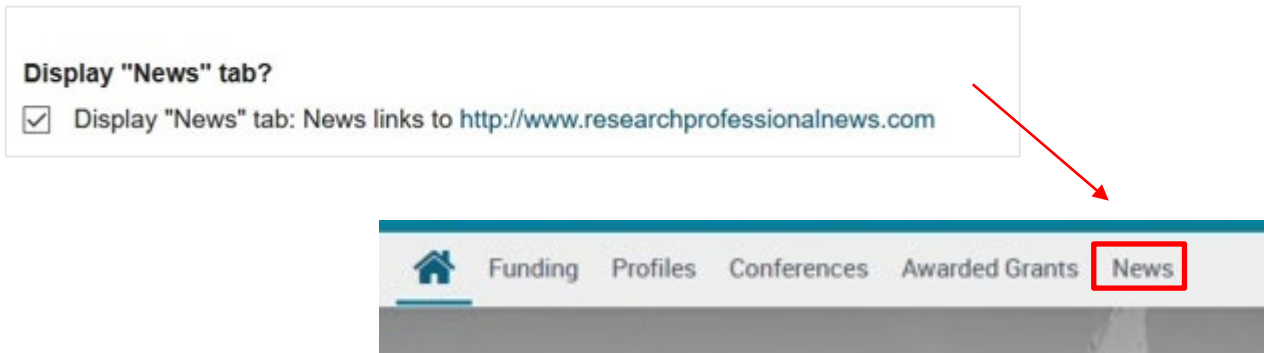
To learn more about Research Professional News visit https://researchprofessionalnews.com

NOTE: Further integrations between Pivot-RP and Research Professional News will be coming later in the year including options to access additional Research Professional premium content that is not available to all users.

Home Dashboard background image

Replace the default background image with an image of your own choosing. This image can be anything – such as an image of your institution, a nature picture, or an interesting graphic, color or pattern.

Tip: The background image you add will automatically be resized to fit the available space. Try to upload an image around 300px high and 1250px wide if you want it to maintain its original proportions and clarity.

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Background image examples & ideas

Default
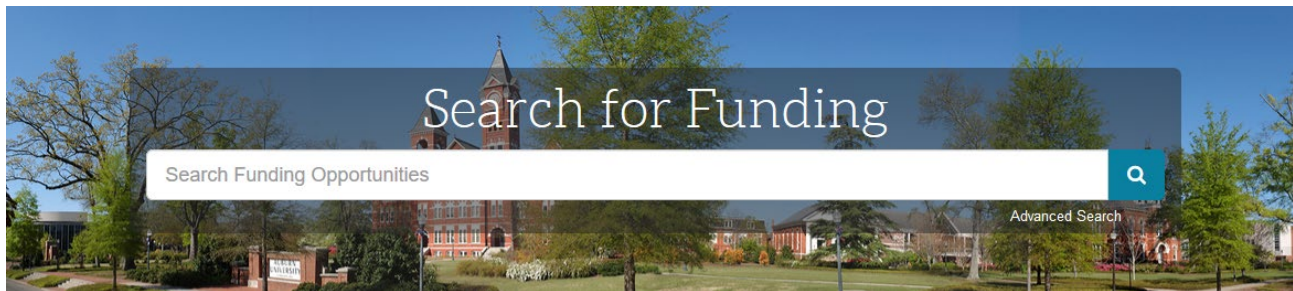
University Quad

Pattern

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Background image examples & ideas

Technology
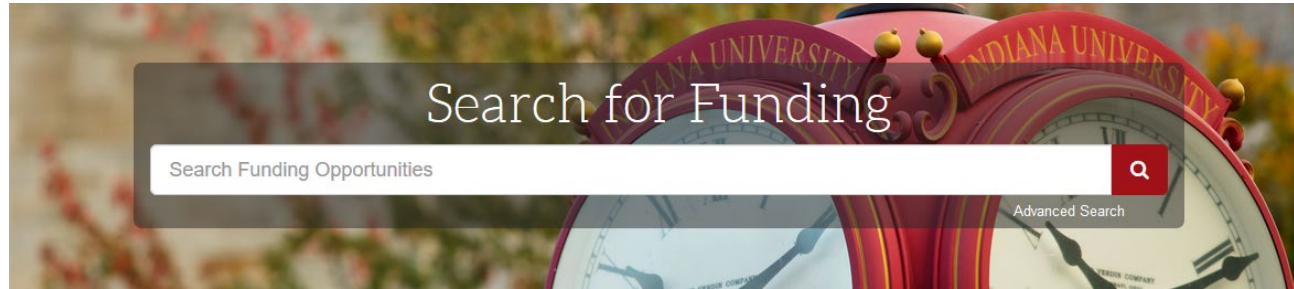
University Landmark

Nature
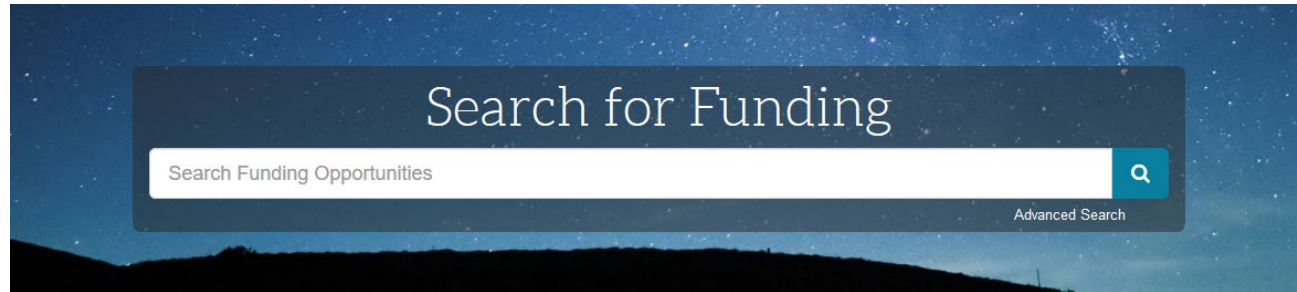
Background image examples & ideas

People
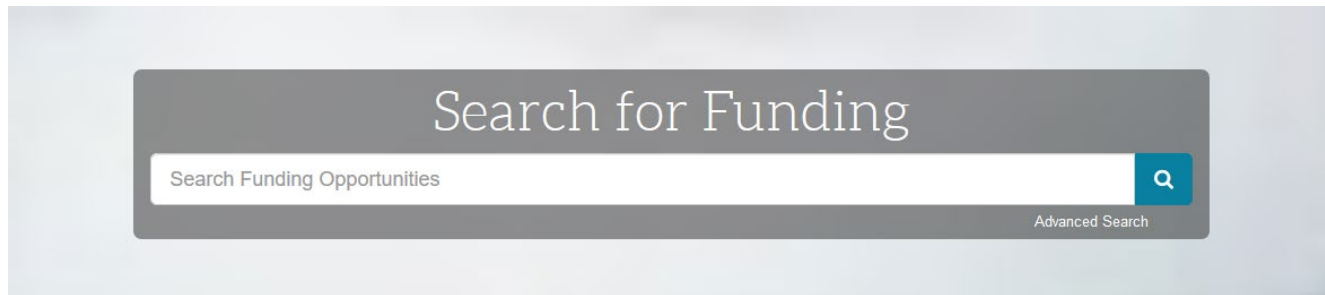
Solid color or gradient

Collegiate logo

Background image sizing and tips

Warning: The background image you add will automatically be resized to fit the available space.

For best result try to upload an image around **300px high and 1250px wide** if you want it to maintain its original proportions and clarity.

- Any image that is significantly smaller than 1250px wide will be expanded and appear somewhat blurry
- Any image that is substantially taller than 300px high will get cut-off and not display fully

Tips: You can add a smaller image with a solid color, gradient color or interesting pattern if you are looking for a more artistic or blurred background effect.

For example uploading this tiny image square ▮ will give you a solid blue background.

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Custom Text and Links

Tips & Resources

If you have questions, please Contact Us.

The following tips and resources are available to help you:

- "How to" documentation: Visit the Knowledge Center

- Tips for searching for Funding and Profiles

- Videos: Short YouTube videos to help you learn how to edit your profile, search for funding, set-up alerts and other features. Visit the YouTube channel.

By default the right panel is pre-populated with links to Pivot-RP help resources. This content can be overwritten using the customizer tool.

The right-hand column of the Home Dashboard page can be completely customized for your institution.

This area could include:

- A description of the services you offer

- Important contact information or office hours

- Links to important resources, departments, and tools for researchers

- Reminders about policies and procedures

- A showcase of important research from your institution via links articles, blogs, Twitter, etc.

- Special announcements

- Links for help, training sessions or user guides on how to use Pivot-RP

- And much more...

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Customizing the right panel: text and colors

Right Column Content Text to appear in far-right section of Home page

Tips & Resources

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- Videos: Short YouTube videos to help you learn how to edit your profile, search for funding, set-up alerts and other features. Visit the YouTube channel.

Reset

Foreground Color

Reset to default

Select

Click anywhere in the text area to modify the default text

- Use the tools at the top to change the size of text and styling

You can easily change colors of text by selecting the "A" icon to expose the color picker

- Hit 'select' to create or pick additional colors not visible in the color picker
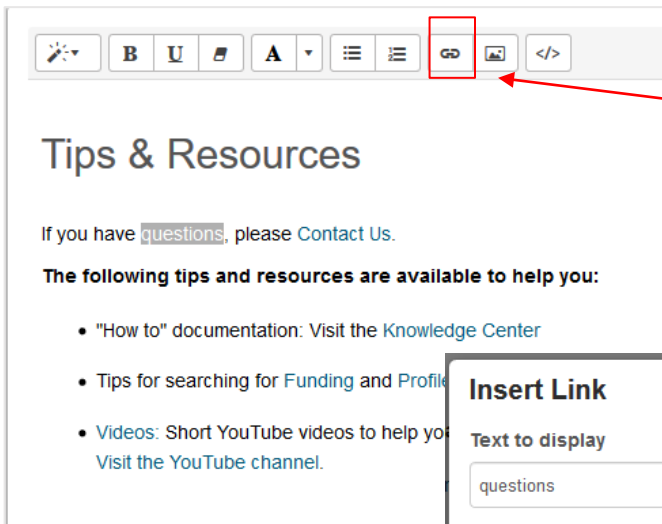
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Adding Links

If you have questions, please Contact Us.

The following tips and resources are available to help you:

- "How to" documentation: Visit the Knowledge Center

- Tips for searching for Funding and Profiles

- Videos: Short YouTube videos to help you learn how to edit your profile, search for funding, set-up alerts and other features. Visit the YouTube channel.

You can add unlimited numbers of links to any other webpages or resources.

Tips & Resources

If you have questions, please Contact Us.

The following tips and resources are available to help you:

- "How to" documentation: Visit the Knowledge Center

- Tips for searching for Funding and Profile

- Videos: Short YouTube videos to help yo Visit the YouTube channel.

Insert Link

Text to display

> questions

To what URL should this link go?

☑ Open in new window

Insert Link

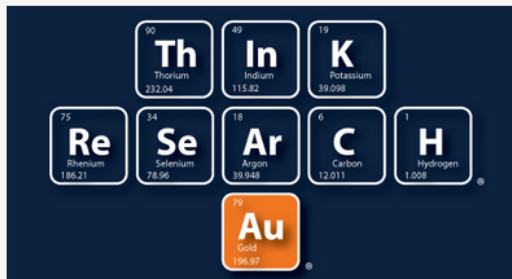**Tip:** You can choose if your link should open in a new browser window/tab (*this is recommended*)

- Highlight text that you would like to turn into a link
- Select the 'link' icon and then enter the URL for the webpage you want this text to link to

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Adding images

Example of an image showing in right column
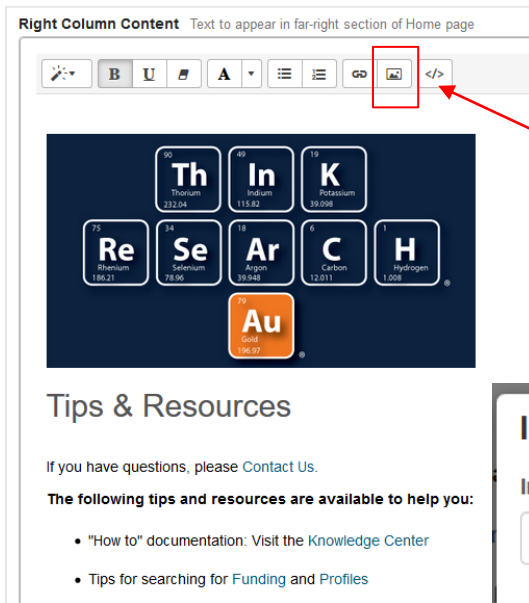
You can easily add images to the right panel
- Images must already reside on a published webpage
- Select the 'picture' icon and then enter the URL path for the image you want displayed
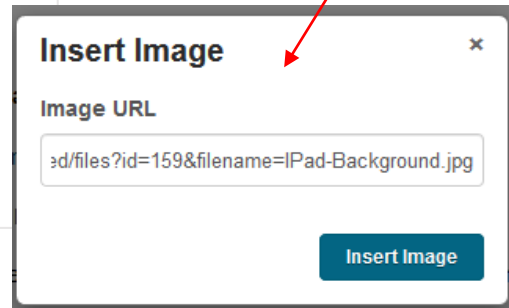
Tip: If necessary, you can resize the image. Just click on the image in the console to bring up the re-sizing options tool.

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Preview and Save

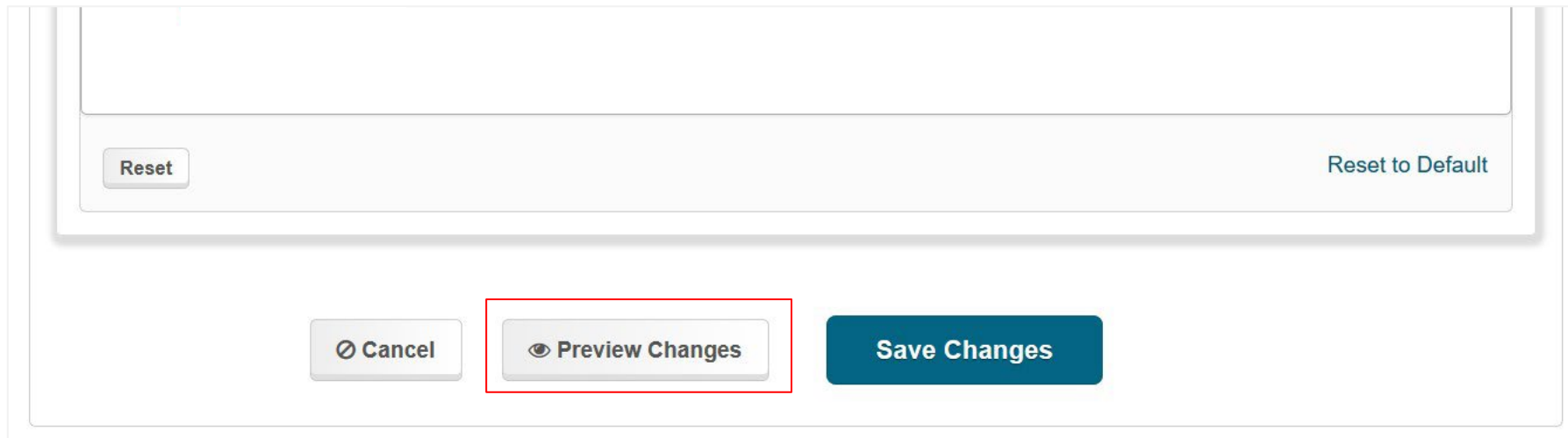The most important feature of the customizer tool is the ability to 'Preview' and 'Save' your customization choices. **At the bottom of the page select "Preview" to view what the user interface will look like with the customizations you have made.**

Note: **No Customization changes will be stored or saved unless you select 'Save Changes'**

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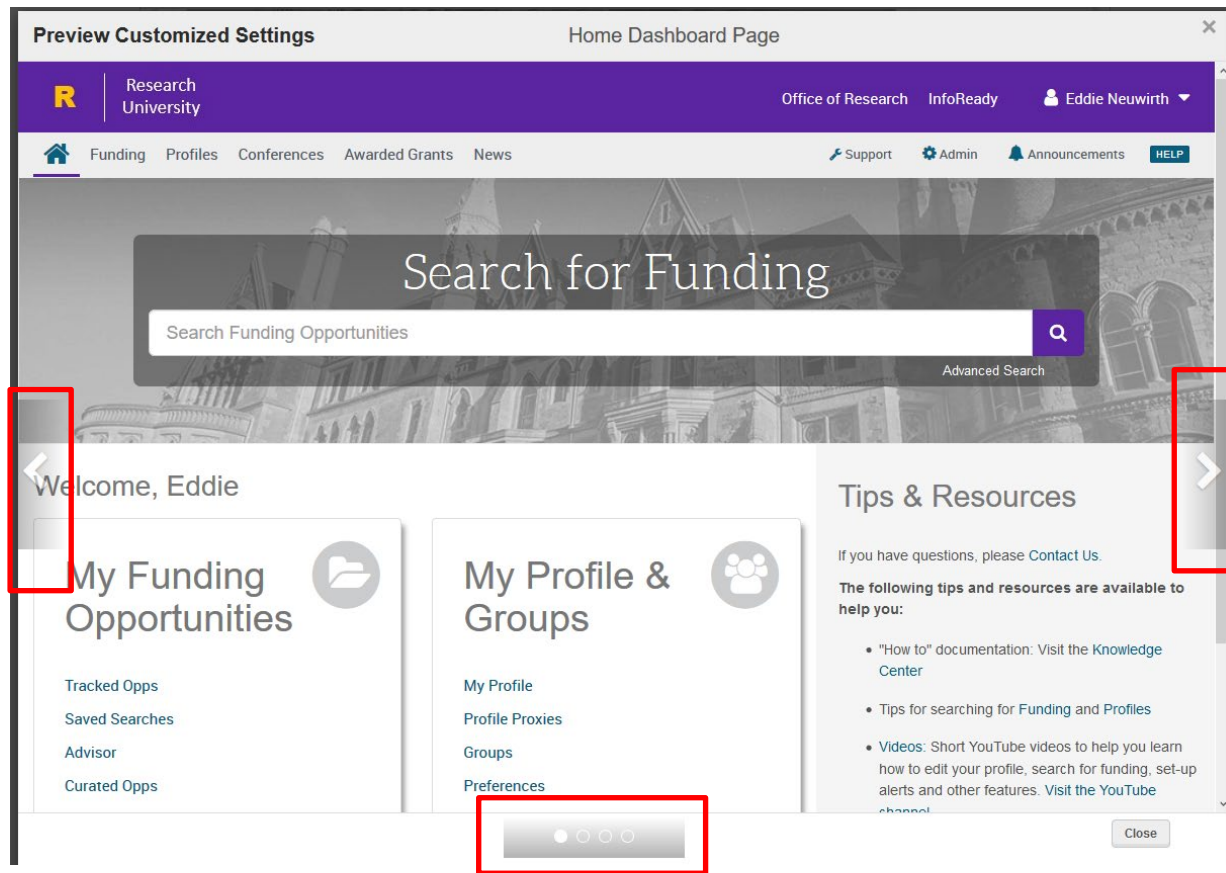
The preview pane will show you exactly what your customized pages and headers will look like.

Use the console arrows to toggle between the different page views. You can preview:

- The home dashboard
- Funding Discovery landing page
- A funding alert email
- A newsletter email

When finished click the "x" or close button to return to the customizer.

Warning: When returning to the customizer tool after previewing - be sure to Save your changes before leaving the customizer or none of your customizations will be saved for the next time you return to the custom branding tab.

Save Your Changes

Warning: **If you do not 'Save Changes' before leaving the customizer tool you will lose any customizations that you have made during your current session and you will need to start over with customizing when you return.**

- Pivot-RP does not store any of your changes unless you select 'Save Changes'.
- Previewing Changes does not do anything to save changes.

Note: **Prior to the September 9 release, you can save changes and they will not be visible to your users. Any changes that you have saved prior to September 9 will automatically go live for your users on September 9th.**

Any customization changes that you make and save after September 9, will instantly update for your users.

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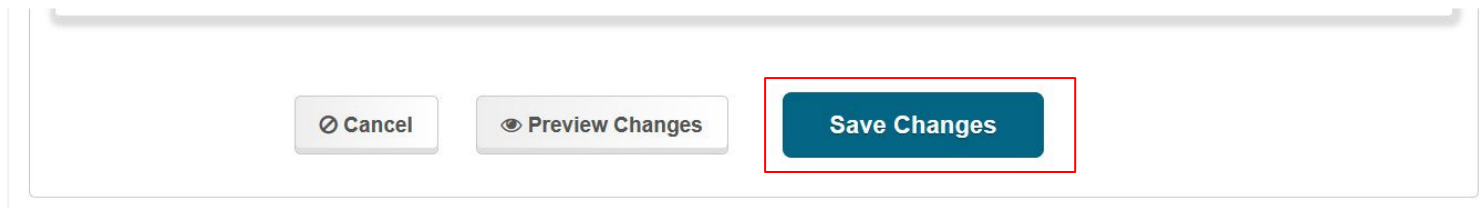
If you have any questions or need assistance with branding Pivot-RP, please contact our Support team

Pivot.support@exlibrisgroup.com

https://supportcase.exlibrisgroup.com/s/Pivot

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