Pivot

Release Notes

September 2020

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What's New – September 2020

- ✓ **New Pivot UI & Home Dashboard**
- ✓ **Expanded Facets/Filters**
- ✓ **Expanded Number of Results**
- ✓ **Research Professional News integration**

Key Benefits:

- **Ability to Customize** the new UI to match your institutional branding and promote other resources
- **Easier access** to the most used and most important features
- Zoom in on most relevant results
- View more results per page
- Access funding news and insights

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New UI Highlights

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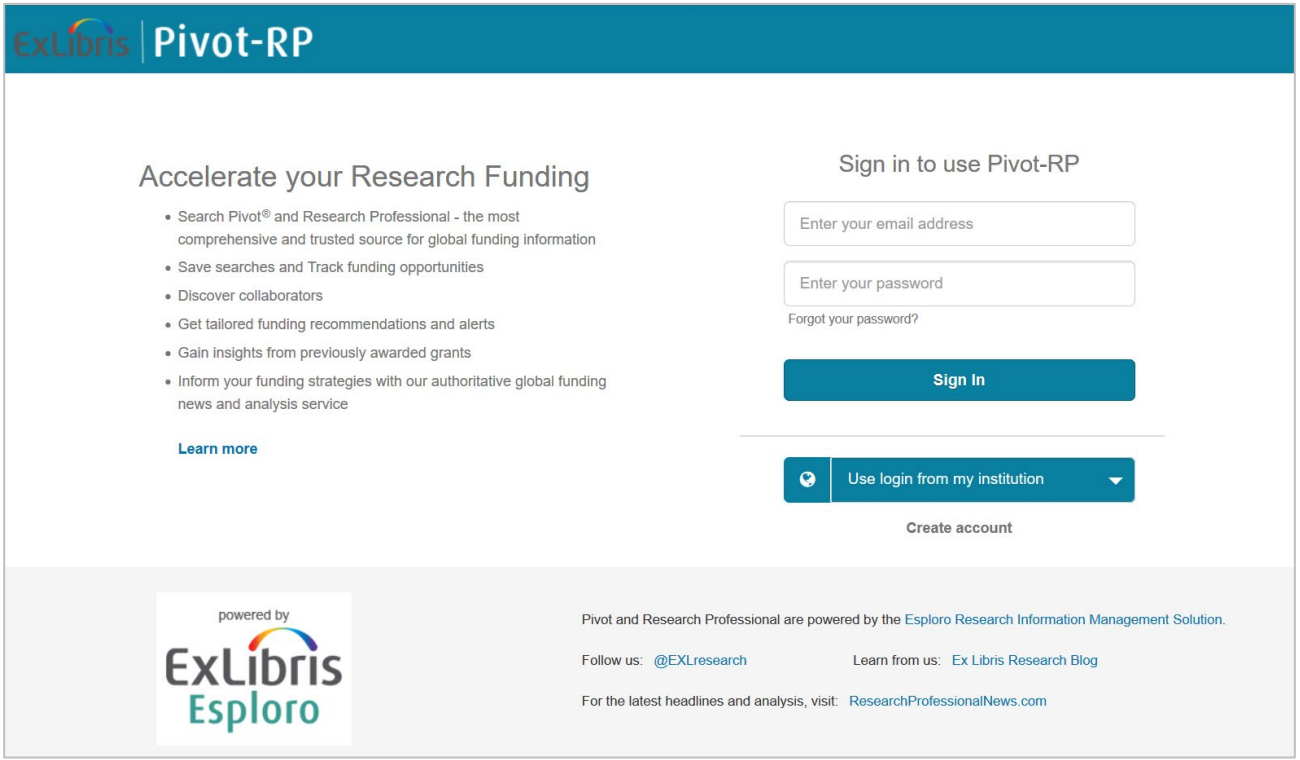
New login page for non-IP Authenticated Users



Fresh look and feel

Easier for users to login

More direct access to ‘create account’ and ‘Single Sign-on’

Same URL:

“pivot.proquest.com”

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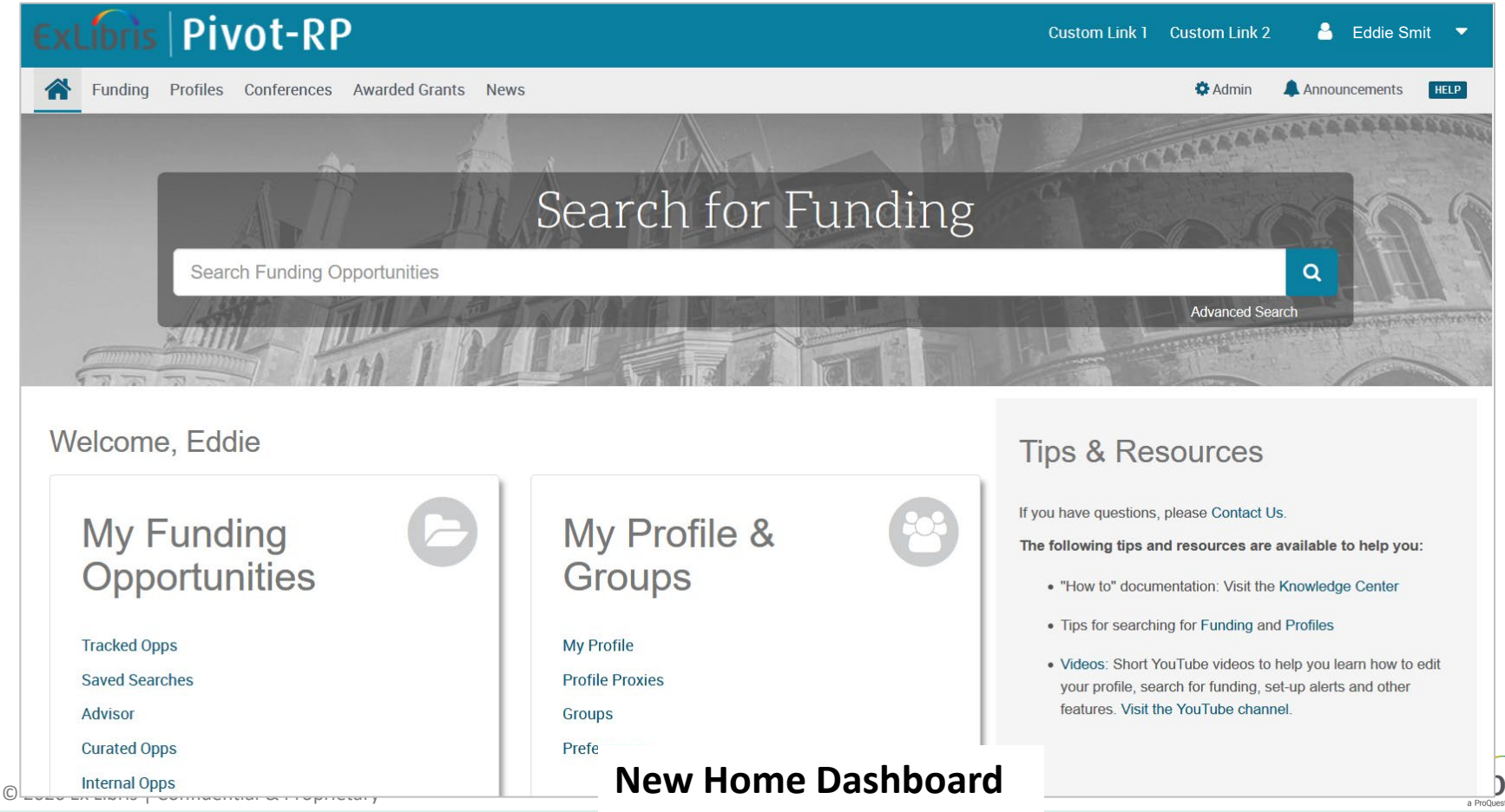
New Look UI … Many Benefits



New Home Dashboard

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New UI Key Benefits

- Full-width UI; more modern design
- Fresh login experience
- Dashboard style homepage brings visibility to the most important features and makes them easier to use
- Highly customizable - Custom logos, colors, images and links makes Pivot more seamless to institutional web presence
- Custom text area to showcase your institution and resources
- More personalized user experience; guides user to profile, preferences and personal folders
- Easier and more intuitive access to key features

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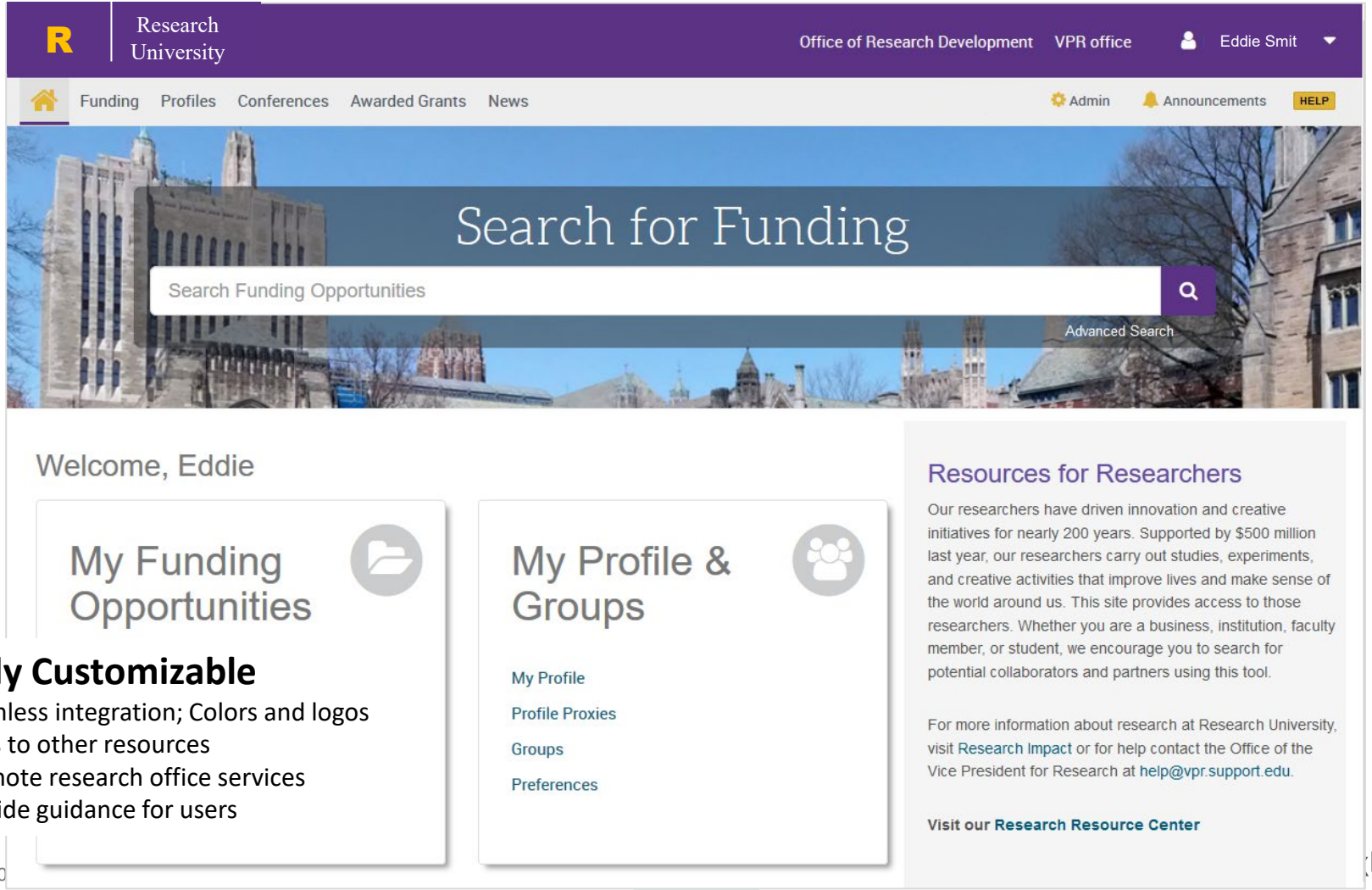

Highly Customizable

- Seamless integration; Colors and logos
- Links to other resources
- Promote research office services
- Provide guidance for users

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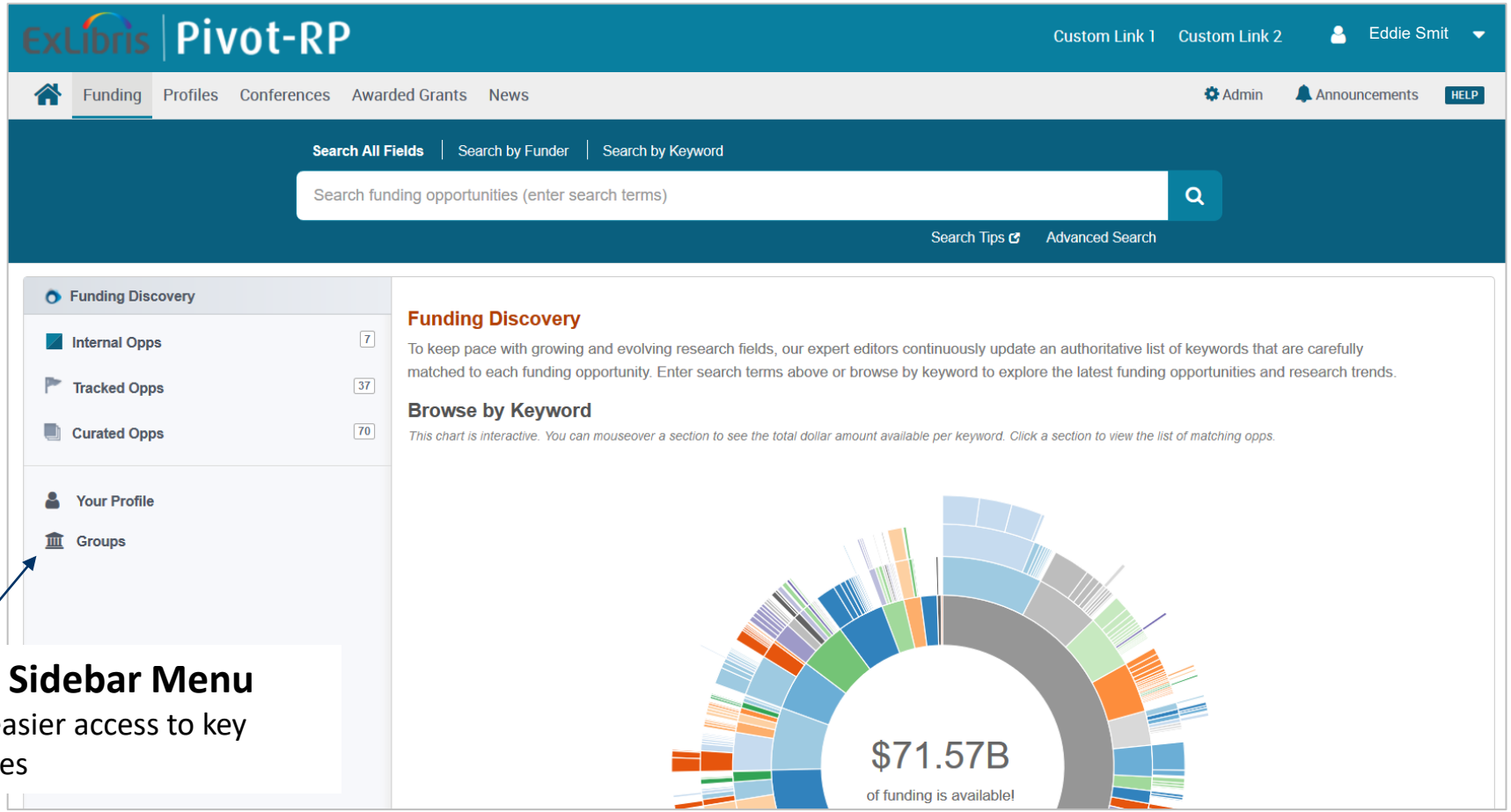

New Sidebar Menu
with easier access to key features

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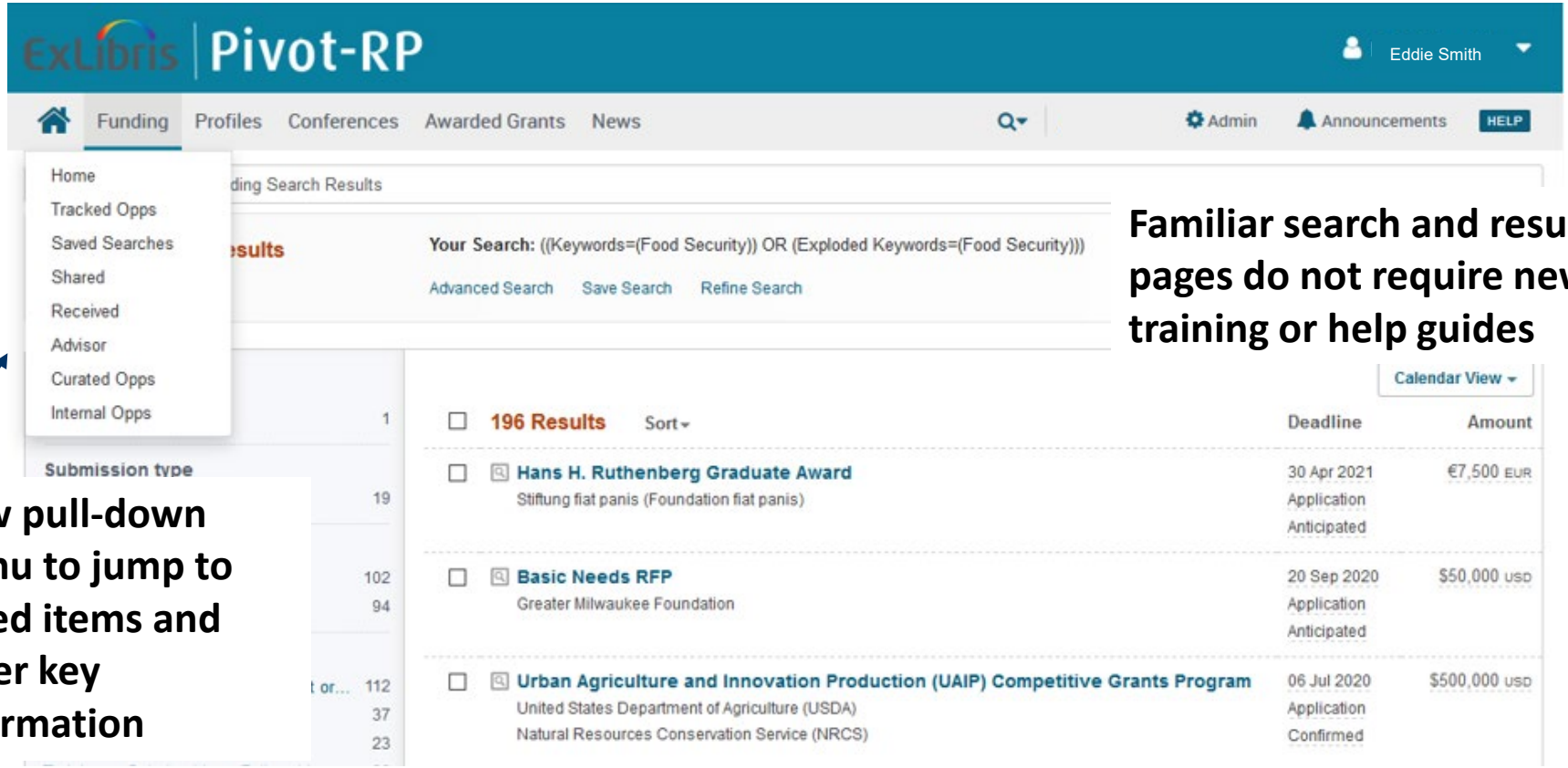

Familiar search and results pages do not require new training or help guides

New pull-down menu to jump to saved items and other key information

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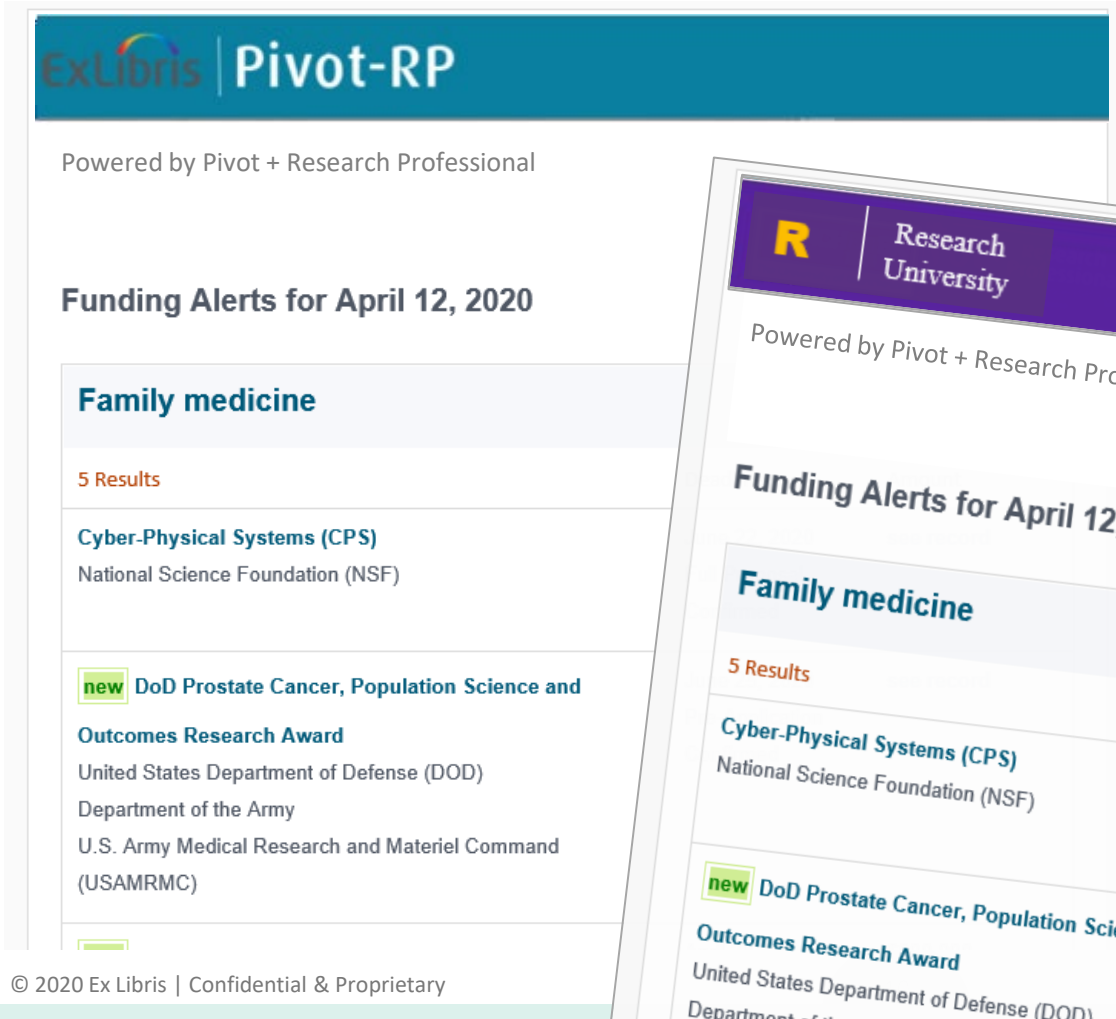
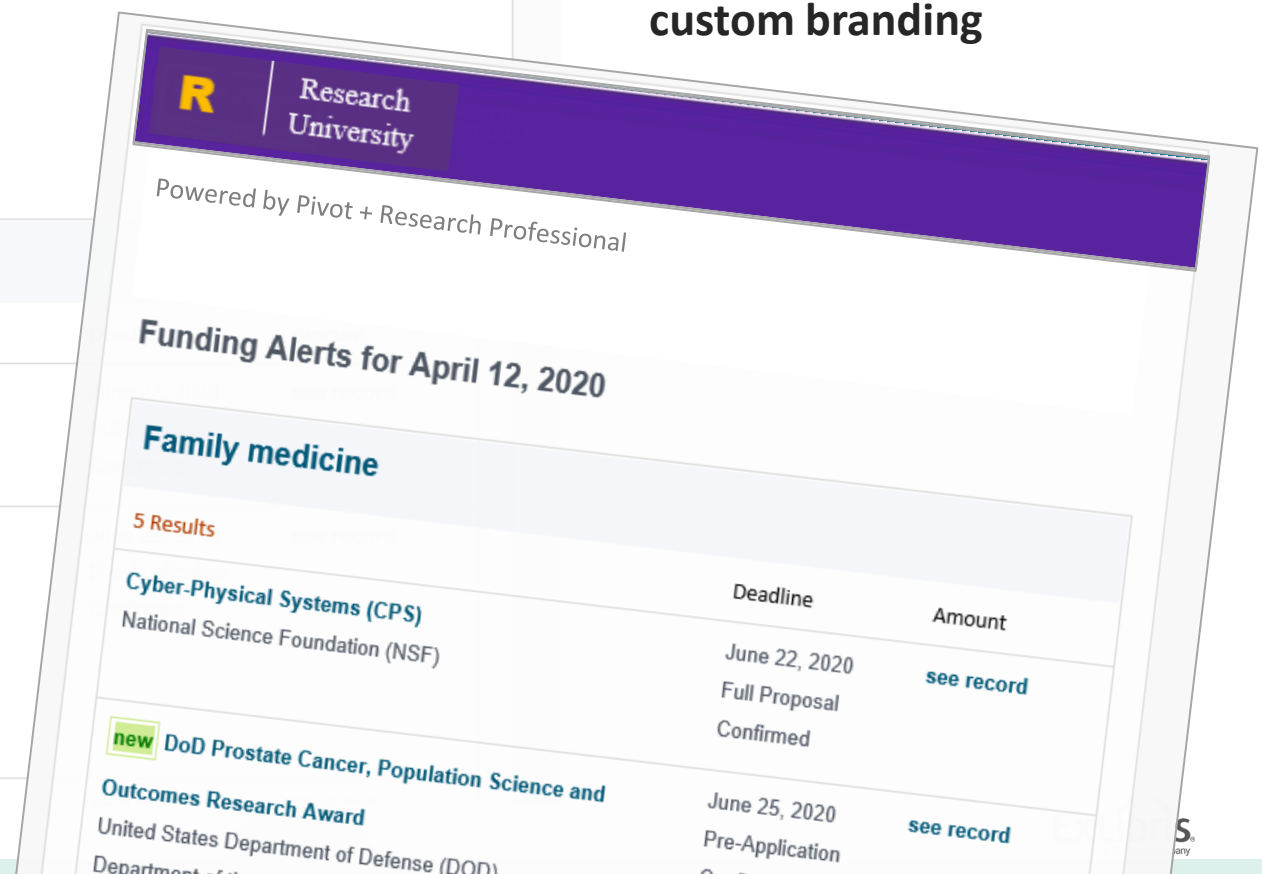
New email alert templates match custom branding





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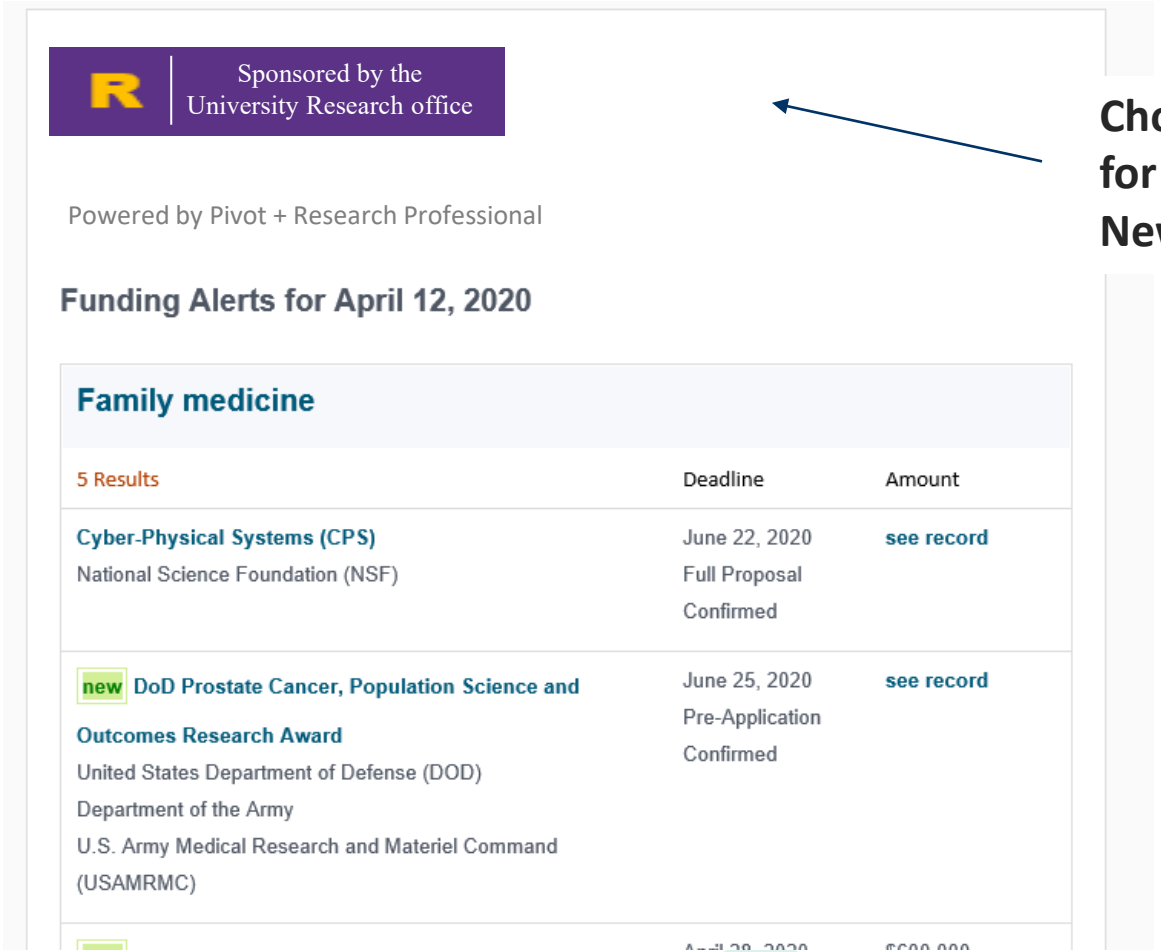

Choose custom logo for Alerts and Newsletters

Can override the default branding if a different logo is desired for emails

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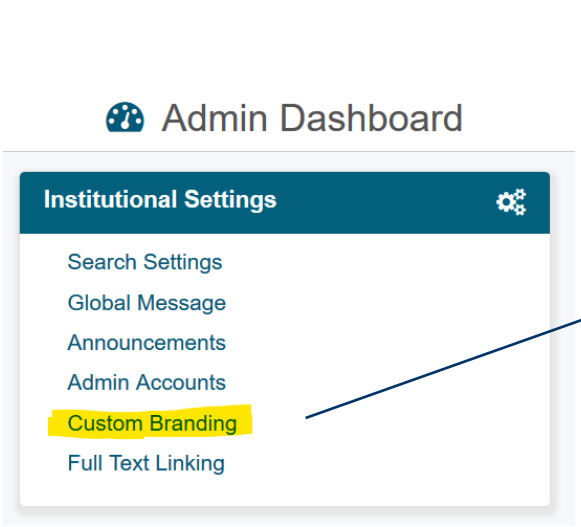
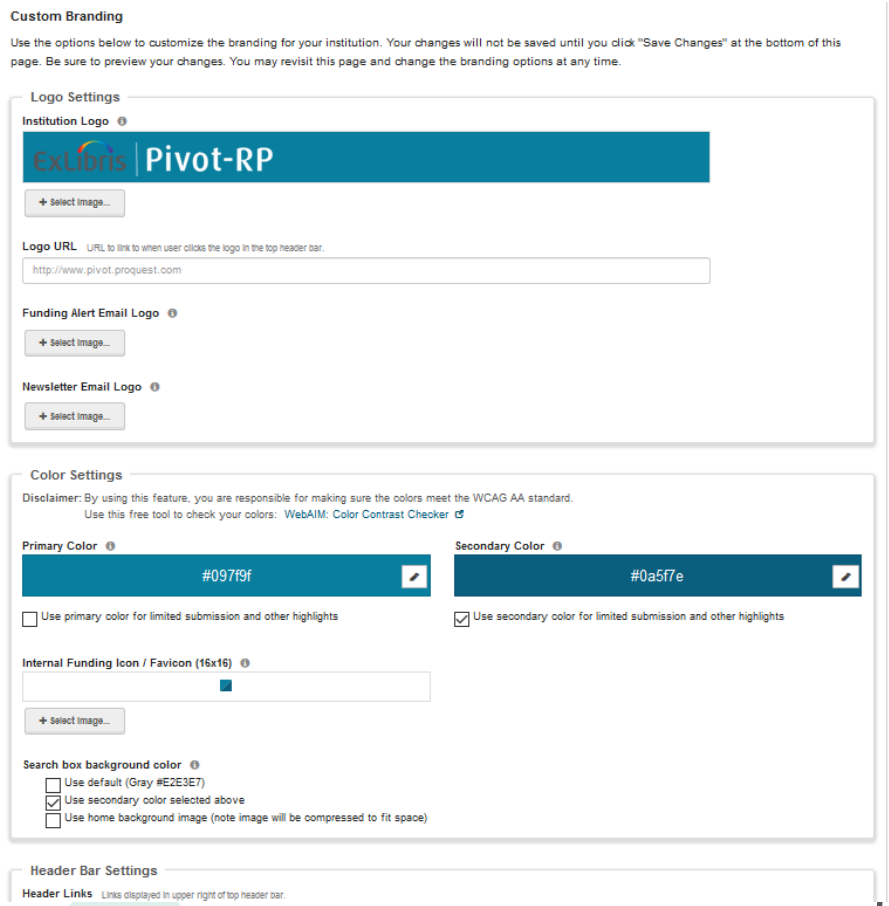
New Custom Branding - Customzier Tool for Admins



Powerful, yet easy to use branding tools

- No programming or IT help needed



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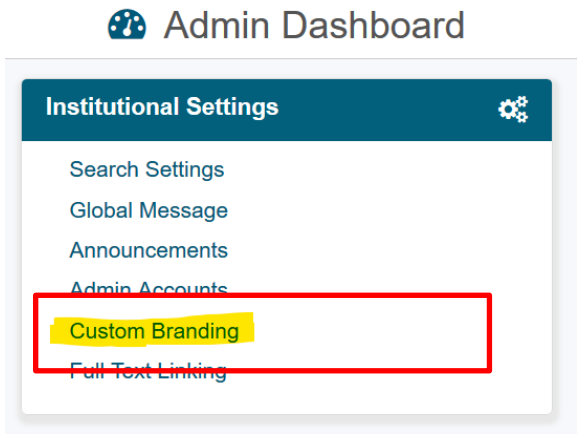
Admin Privileges Required for Custom Branding

- If you don't see the *NEW* Custom Branding tab in the Admin Dashboard, please contact your primary Pivot administrator for permissions or reach out to our Support team if you have questions

The branding tool is for Pivot administrators only



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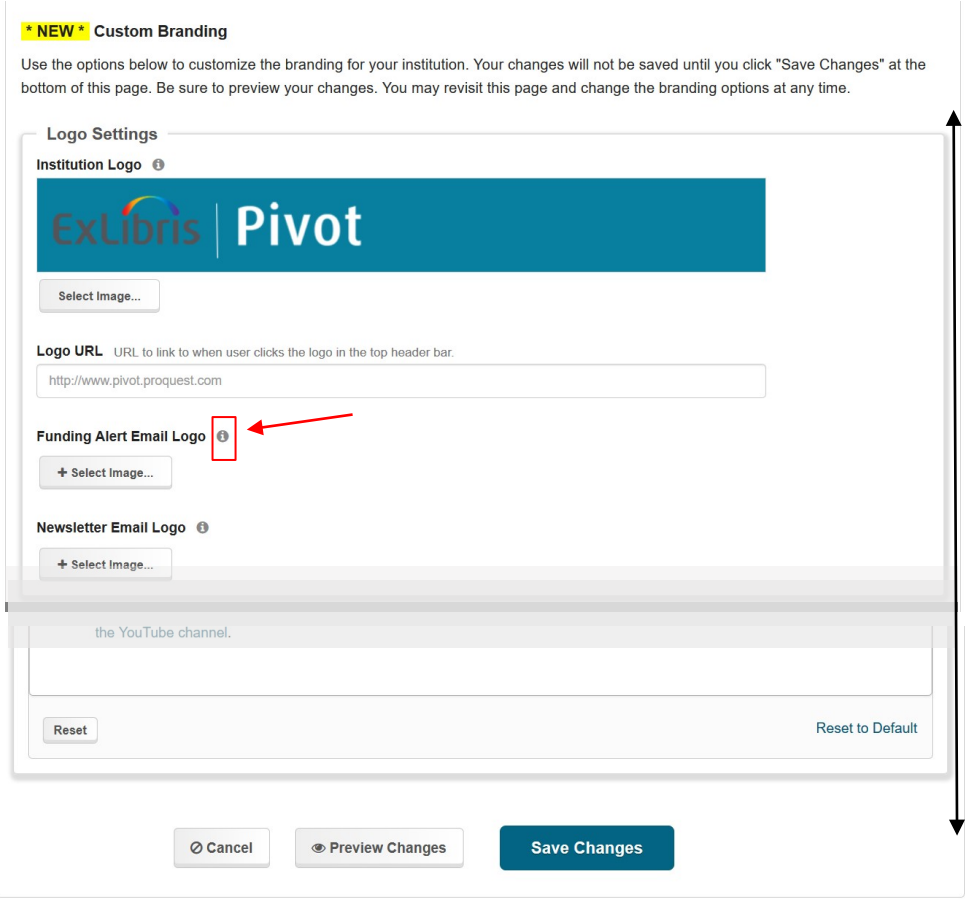
Custom Branding basics



The new custom branding tool is a single Admin page broken into clear sections with prompts to modify, enter or upload the information needed for you to customize Pivot

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

Please reference the new Custom Branding Guide for step by step instructions

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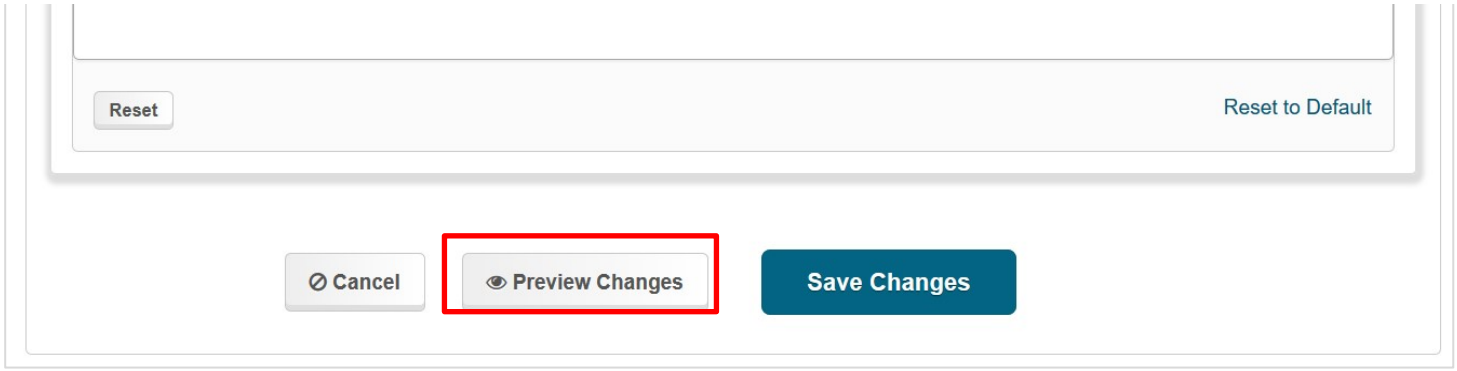
Previewing and Saving Changes

- Use the '**Preview Changes' button** at the bottom of the page to preview any 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 Changes"**

- **Note: Any customization changes that you make and save will instantly update for your users when you select "save changes." This is a real-time editor so you can quickly make changes and modifications at any time.**



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Additional Enhancements

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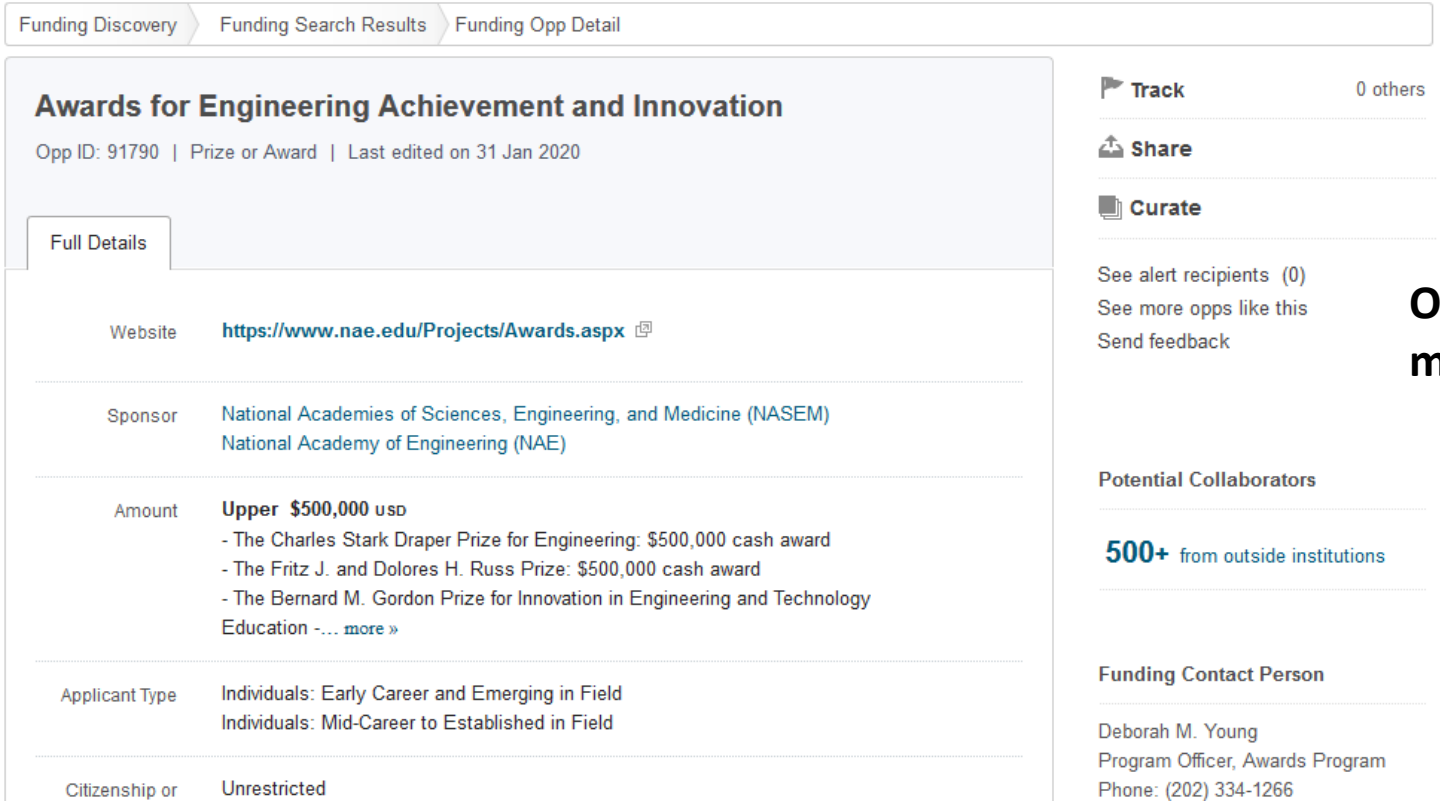
Single, Unified Tracked List – Removed Active Opps



Only Tracked Opps moving forward

Offers more intuitive “call to action” buttons

Note: for anyone with Active opps previously they were migrated to their “tracked list” with a special notation

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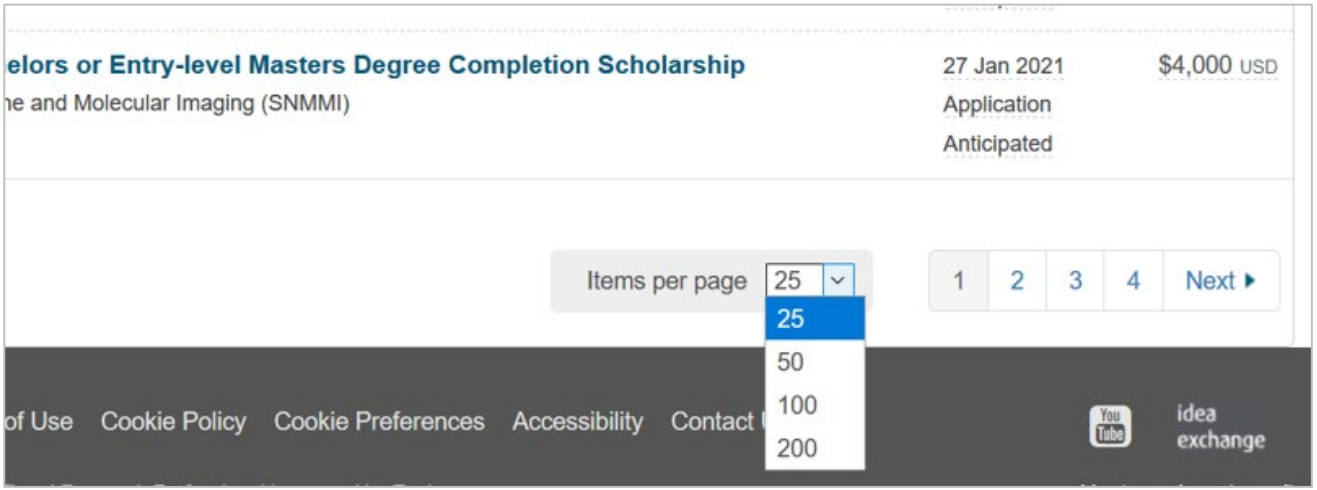
Expanded number of results per page



Make more content visible with less clicking and page tabbing: ability to view 25, 50, 100, or 200 results

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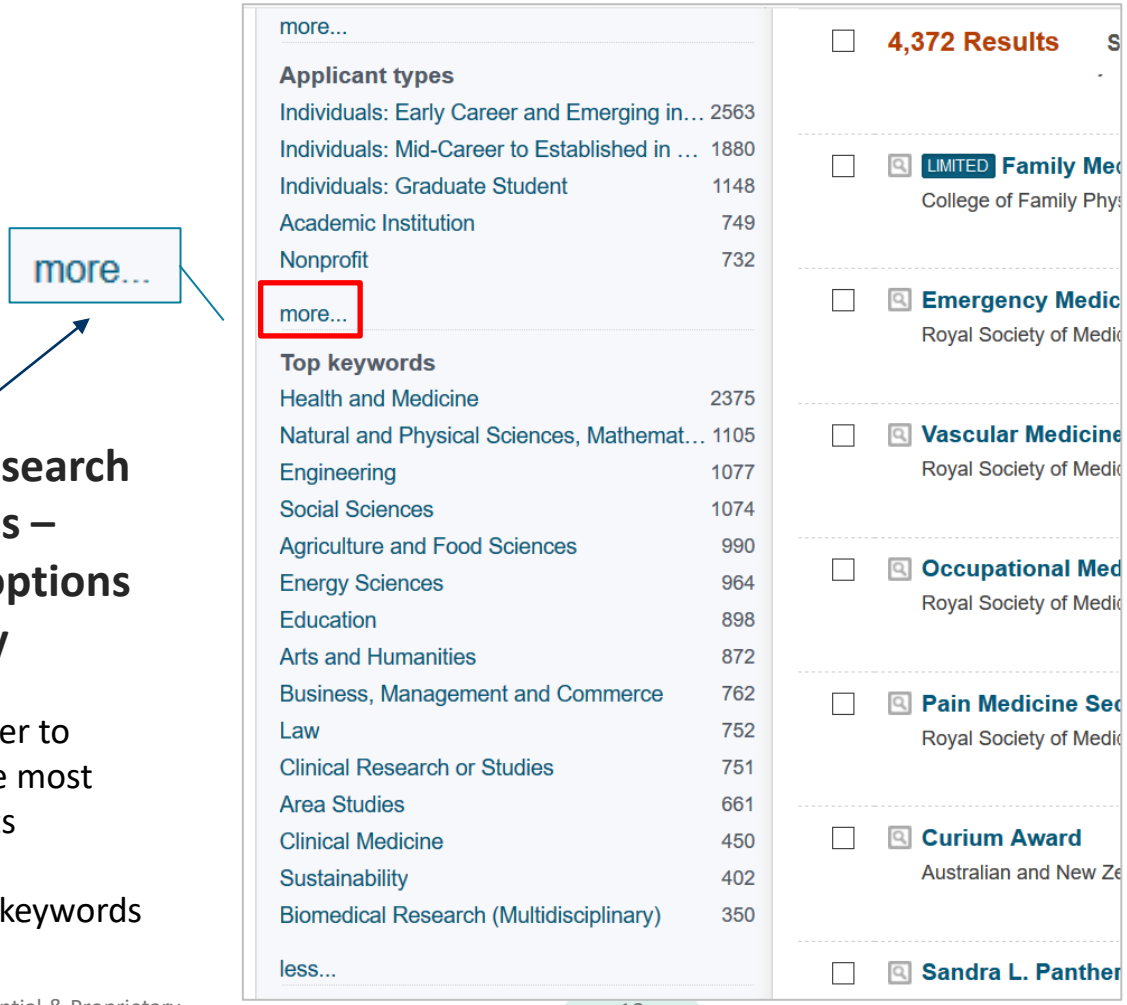

Expandable search results facets – view more options per category

- Makes it easier to zoom in on the most relevant results

- See up to 15 keywords

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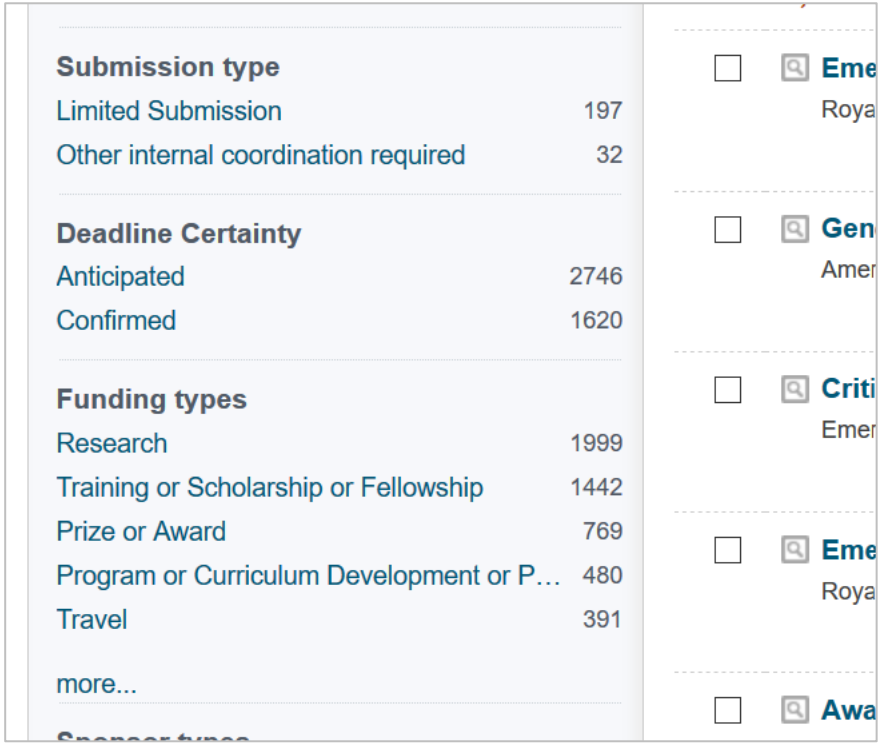
New “Deadline Certainty” facet

Quickly filter Confirmed vs. Anticipated deadlines



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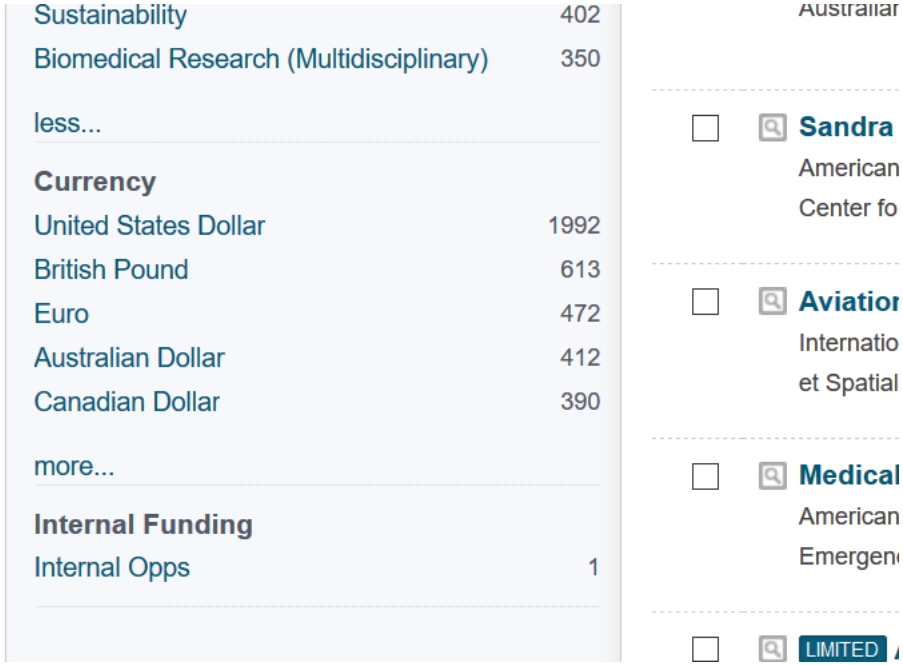
New “Currency” facet

Filter search results by native currency



Note: Pivot-RP automatically searches across all opportunities regardless of native currencies. For search purposes opportunities are normalized and converted to US dollars but displayed in native currency in the results set.

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Content Improvements

Research Professional News & Awarded Grants

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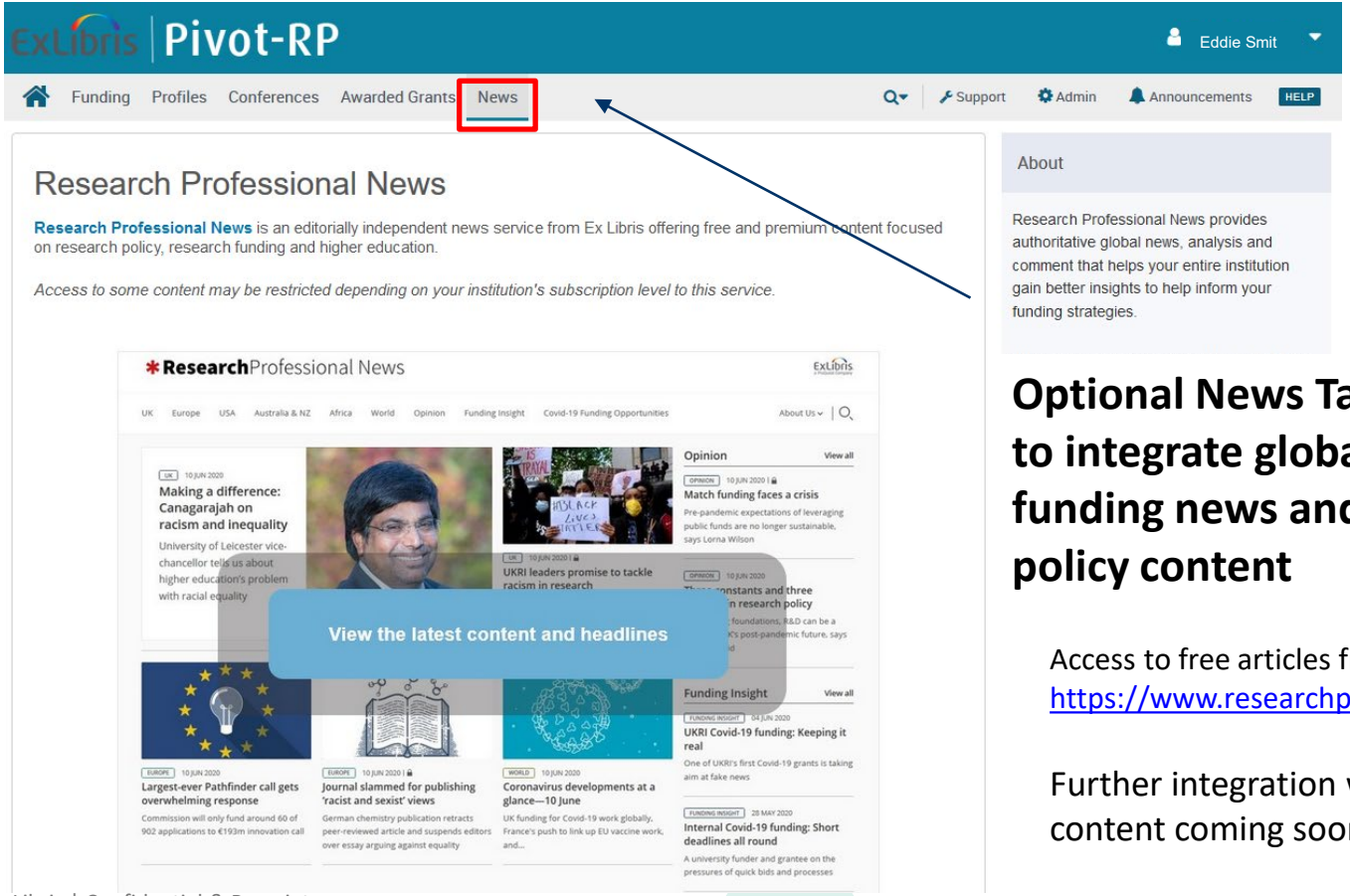
Research Professional News Integration



Optional News Tab to integrate global funding news and policy content

Access to free articles from https://www.researchprofessionalnews.com

Further integration with premium content coming soon

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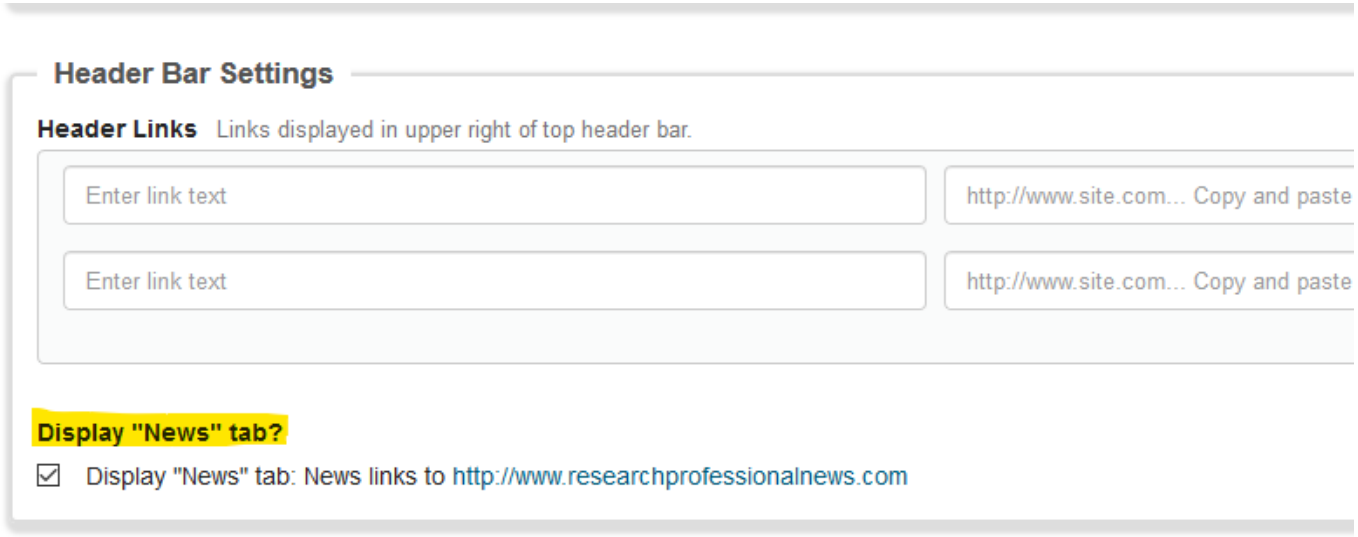
Research Professional News Integration

Enabled via the Custom Branding tab → Header settings



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Awarded Grants: New Funders Added

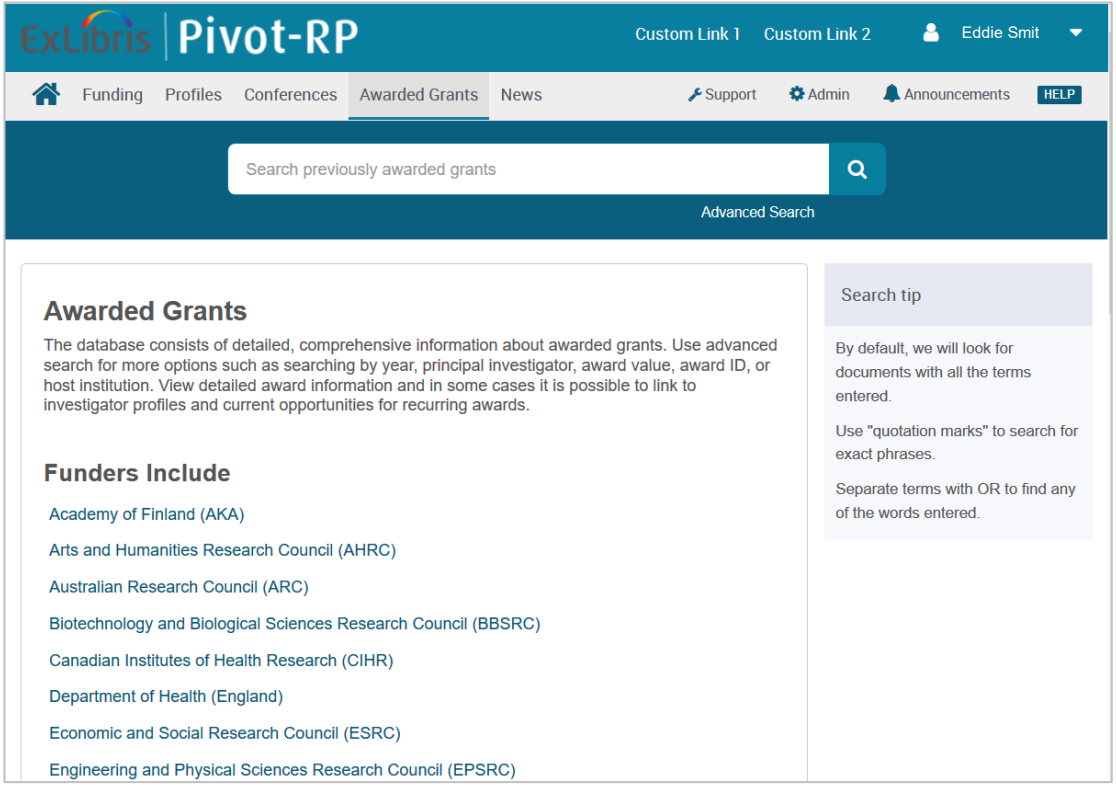
~100,000 grants added

Canada

- Canadian Institutes of Health Research (CIHR)
- Natural Sciences and Engineering Research Council of Canada (NSERC)

New Zealand

- Royal Society of New Zealand



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Support and Resources

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New Custom Branding Guide

- For details on *what* can be customized in the new UI and *how* to use the new custom branding tool, please reference the new **Custom Branding Guide**.

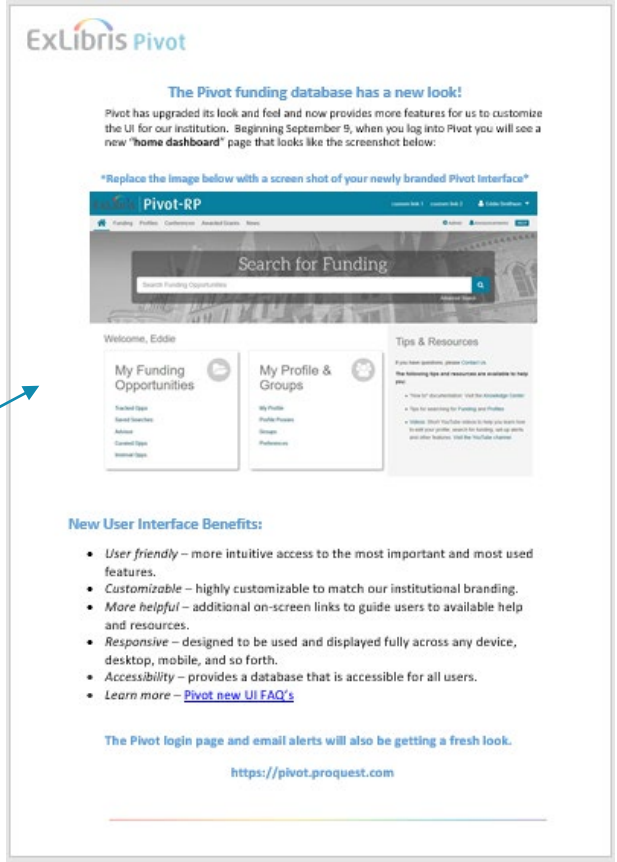
Click the image to view the guide

Resources

- In order to help you communicate to your users about the new UI changes, we are in the process of updating resources and guides in our knowledge center. Visit the Resources and Support page: https://knowledge.exlibrisgroup.com/Pivot/Product_Materials/Resources_and_Support

- Look for items marked “New UI” or “2020” for the latest updates.

- Use our customizable “Pivot has a new look!” flyer to let your users know that Pivot has a new UI.
  - **Just take a screenshot of your customized UI in Preview mode and use it in place of our default image to let your users know what the new UI will look like for your institution.**



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

pivot.support@exlibrisgroup.com

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

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