



QUICK START GUIDE

<https://pivot.proquest.com>

Welcome to Pivot!

This guide will provide you with helpful tips on how to use Pivot.

CREATING YOUR ACCOUNT

If you don't have a Pivot account, go to <https://pivot.proquest.com>.

- Click on the **Sign-up** link in the upper right of the screen.
- Fill in all required fields
- Use your institutional-assigned email address (this will be your User ID)
- Create a password
- Find and Select our institution from the Institution pull-down menu
- Click the "Create my account" button and Pivot will send you an email to the address you supplied; in the email will be a verification URL.
- Click on the URL and you can begin using Pivot right away!

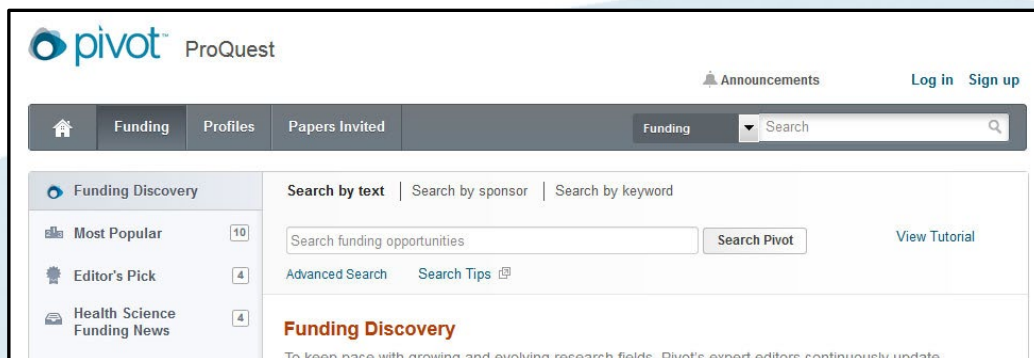
Note: If your confirmation email does not arrive in a short amount of time, you may want to check your emails accounts spam folder.

LOGGING IN

There are two ways to access Pivot:

1. Use an on-campus computer and go directly to <https://pivot.proquest.com>.
2. Log into Pivot at <https://pivot.proquest.com> with your username and password.

You can log in to Pivot from off-campus to access your account and search for Funding or Scholars. You can also log in to Pivot from on-campus if you wish to view your Pivot homepage, manage your Funding Alerts, and/or view your tracked or active opportunities.



SEARCHING PIVOT FUNDING

There are several ways to search the Funding area of Pivot: Quick Search, Keyword search and Advanced Search.

Starting Your Search

The best place to start a Pivot search is from the **Funding tab** to see all your search options.

You can choose to search

- by entering **Free-Text terms**
- by **Sponsor name** (funding agency)
- by **Keywords**

or

- you can browse and select keywords using the graphical **browse by keyword** wheel

or

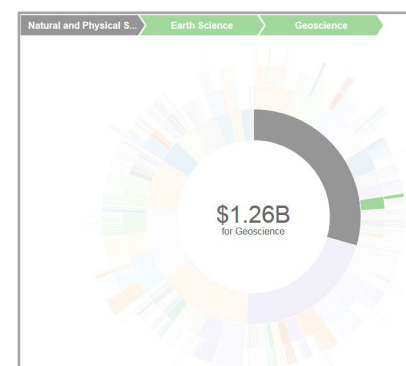
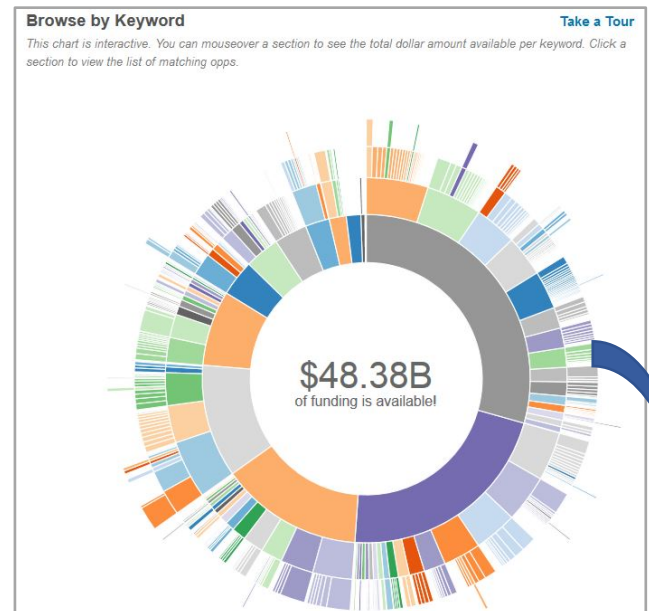
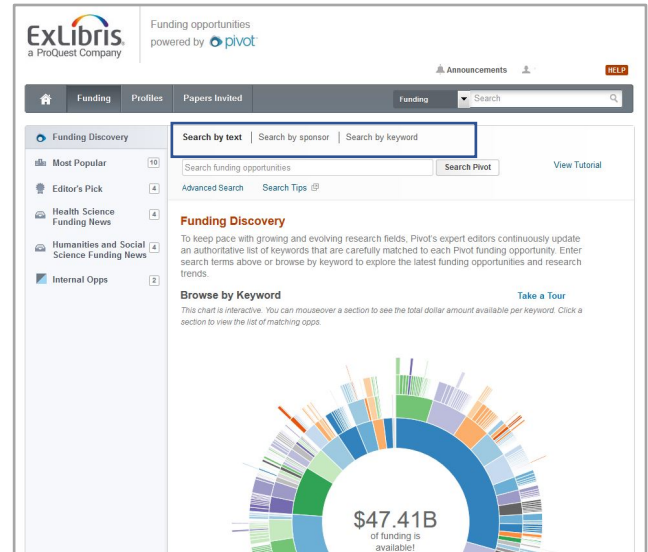
- choose **Advanced Search** for more precise searching options
1. Selected which way you want to search
 2. Enter your search term in the text box.
 3. Click the "Search Pivot" button.

Search by Keyword

One way to search by keyword is to use the interactive **Browse by Keyword** wheel.

1. Hovering over different parts of the wheel will give you a sense of approximately how much funding is available by topic.
2. Find a **keyword** that matches your research interest.
3. Click that part of the wheel to view all results in Pivot currently associated with that term.

Keywords can also be found and included in searches (along with other search parameters) when using the **Advanced Search** form





ADVANCED SEARCH

1. Start by selecting the **Match All** or **Match Any** radio button at the top of the screen. This selection will add “And” or “Or” to the search rows beneath the option.
2. Click on the drop-down menu to select which field to search (**All Fields, Abstract, Title, Sponsor, or Sponsor ID**).
3. Enter your search terms into the boxes. If additional rows are needed, click **Add another row**.
4. Additional fields are available – click on any field name to expand the field options.
5. Click **Search**.

Find Opportunities matching

Match all of the fields
 Match any of the fields ?

or

? and or

and or

[+ Add another row](#)

- [▶ Amount](#)
- [▶ Deadlines](#)
- [▶ Limited Submission](#)
- [▶ Activity Location](#)
- [▶ Citizenship or Residency](#)
- [▶ Funding Type](#)
- [▶ Keyword](#)
- [▶ Applicant Type](#)
- [▶ Sponsor Type](#)

Helpful Hint: You can determine which opportunities to exclude by entering terms in the **Exclude These** section. Also note that your campus administrator may have pre-set Activity Location and/or Citizenship filters that are automatically included in your Funding Search. If those filters are set, you will see them at the top of the search screen. You can remove them by deselecting the check boxes to the left.

Choose **Funding Type** to limit to opportunities of a particular type or for a particular activity, such as postdoctoral awards or travel.

▼ Funding Type

- Postdoctoral Award
- Prize or Award
- Program or Curriculum Development or Provision
- Publishing or Editorial
- and Research

Choose **Sponsor Type** to limit to opportunities from a particular type of funder, such as the US or international governments, a private foundation, or a commercial entity

▼ Sponsor Type

- Federal, U.S.
- Multinational Organization
- National Government, Non-U.S.
- Other Nonprofit
- Private Foundation

SEARCH RESULTS

There are two different ways to refine your search from the results page: Refine Search or Faceted Searching.

REFINE YOUR QUERY

1. From the search results page, click on **Refine Search** from the top of the page. This option will take you to the **Advanced Search** page, which will display your previous search strategy
2. Add or remove criteria to narrow down or broaden your original search.
3. Click Search.

FACETED SEARCHING

Faceted Searching lets you drill down to include more specific criteria without having to go back to your original search.

1. On the search results page, go to the left side of the page, where you will find the Faceted Search area. This area will break down your search results into specific categories based upon **Submission Type, Top Funding Types, Top Sponsor Types, Top Requirements, and Top Keywords**.

Above the facets, you may notice that your results are also filtered by country for citizenship and residency and/or activity location. These filters are set by your Pivot Administrator and you can opt to remove the filters from your search query by clicking on the "x" next to the filter.

2. Click on the specific faceted search criteria to narrow down your results. Your results list will refresh after you select a facet.

The screenshot shows a search results page for the query 'genetics'. At the top, there are navigation tabs for 'Funding', 'Profiles', and 'Papers Invited'. The search bar contains 'genetics' and a search icon. Below the search bar, there are links for 'Advanced Search', 'Save Search', and 'Refine Search', with 'Refine Search' highlighted by a red box. The main content area is titled 'Search Funding Results' and shows '593 Results' sorted by 'Sort+'. A table of results is displayed with columns for 'Deadline' and 'Amount'. On the left side, there is a 'Faceted Search' area with several categories: 'Recently added', 'Submission type', 'Top funding types', 'Top sponsor types', 'Top applicant types', and 'Top keywords'. Each category has a list of items with counts, and a red box highlights the 'Refine Search' button and the 'Faceted Search' area.

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SAVING, TRACKING AND SHARING

SAVING A SEARCH

1. From the search results page, click on **Save your Query** at the top of the page. (If you are not logged in, the system will prompt you to enter your Pivot username and password.)
2. Enter a name for your saved search in the text box.
3. Indicate whether you would like to receive a weekly alert email with new or updated opportunities from this query, using the checkbox.
4. Click **Save**.

SAVING A FUNDING OPPORTUNITY TO A TRACKED OR ACTIVE LIST

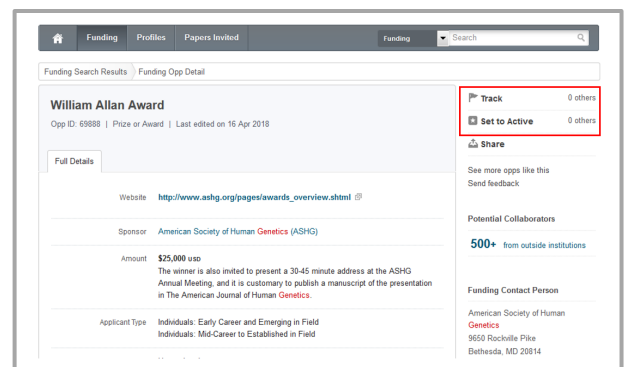
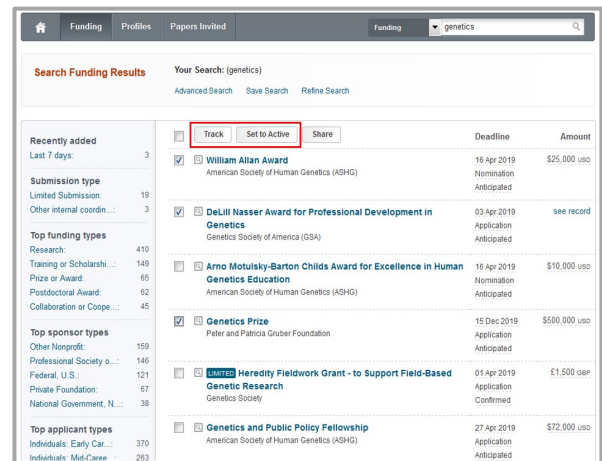
Saving Funding Opportunities in your Pivot account allows you to maintain two separate lists of opportunities you are interested in. Your active list will be a shorter list of your very important opportunities, and your tracked list will be a longer list of opportunities that you still wish to keep track of. When you save an opportunity, you will have the option to choose which list you want the opportunity on. You can save an unlimited number of opportunities.

FROM THE FUNDING RESULTS PAGE

1. From the search results page, select which opportunities to save.
2. Click **Track** or **Set to Active** and choose to put the opportunities on your **tracked list** or your **active list** (opportunities cannot be on both lists).
3. By default, you will receive an email when there are updates to these opportunities. If you do not wish to receive an alert, de-select the email option.
4. Enter a new tag or select from your existing tag list.

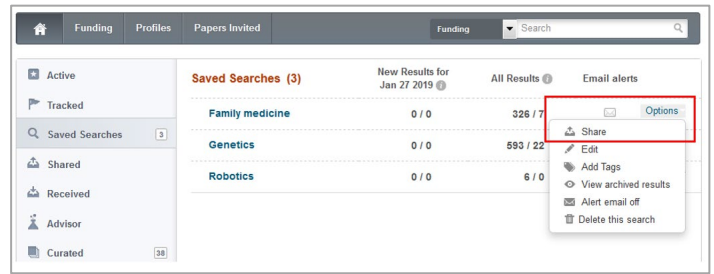
FROM AN INDIVIDUAL OPPORTUNITY

1. Click the opportunity name from the search results page to view the complete details.
2. Click **Track** or **Set to Active** depending on whether you want to put the opportunity on your **tracked list** or your **active list**.
3. By default, you will receive an email when there are updates to these opportunities. If you do not wish to receive an alert, you'll need to modify your preference from your Pivot home page Active or Tracked list.
4. Enter a new tag or select from your existing tag list by clicking **Add tag** (which will display once you choose Track or **Set to Active**).



SHARING A SEARCH

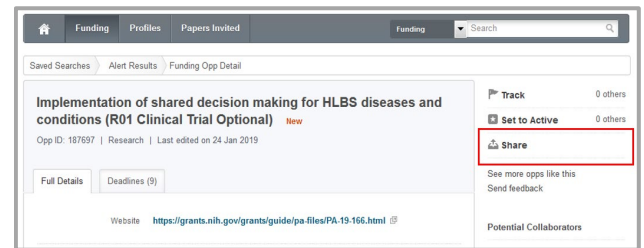
1. Log in to your Pivot account and click **Saved Searches**.
2. Click **Options** and then **Share**.
3. Enter the name or the email address of the person that you wish to share this search with.
4. Include a message if you would like.
5. Click **Send**.



Note: A unique URL will be generated so you or your colleagues can click to access the full results list of this search strategy. This URL can then be posted to a website, electronic newsletter, listserv, etc. Your colleagues must belong to a subscribing institution to view the results; otherwise, he/she will get an error message when trying to view the search results. Users will need to login with a Pivot username and password if trying to view the results from off-campus.

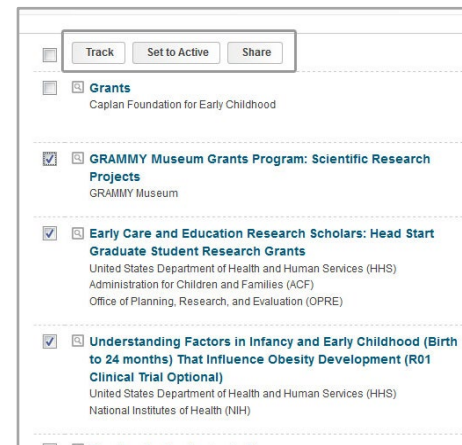
SHARING A FUNDING OPPORTUNITY

You can share funding opportunities three ways within Pivot—from the opportunity itself, from a funding results list or from your Active or Tracked list.



FROM THE OPPORTUNITY

1. Run a Funding search.
2. Select the opportunity you wish to share.
3. Click **Share**.
4. Enter the name or email address of the person you wish to share the opportunity with, include a message, and click **Send**.



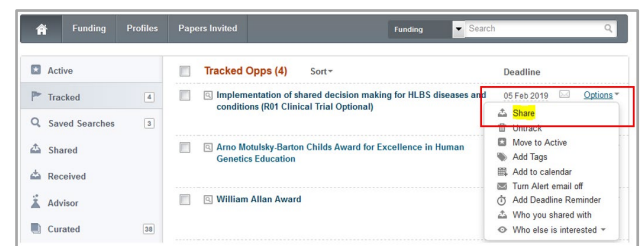
FROM A FUNDING RESULTS PAGE

1. Run a Funding search.
2. Select the opportunity(ies) you wish to share.
3. Click the **Share** button.
4. Enter the name or email address of the person you wish to share the opportunities with, include a message, and click **Send**.

FROM YOUR ACTIVE OR TRACKED LISTS

1. Select the opportunity you wish to share.
2. Click Options, and then click Share.
3. Enter the name or email address of the person you wish to share the opportunity with, include a message, and click Send.

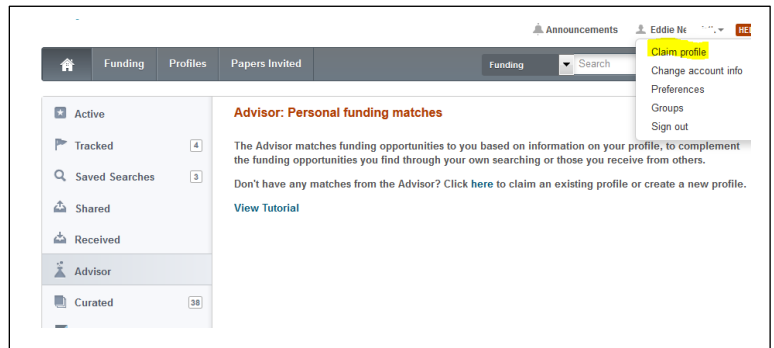
Note: You can also share all of your active or tracked opportunities or a group of tagged opportunities. Select the opportunities you wish to share and click the Share button at the top of your list. If you have not narrowed your view by clicking on a tag, you can share all of your active or tracked opportunities. If you have narrowed your view by clicking on a tag, you can share those specific opportunities.



SETTING UP AUTOMATED FUNDING ALERTS

ADVISER ALERTS

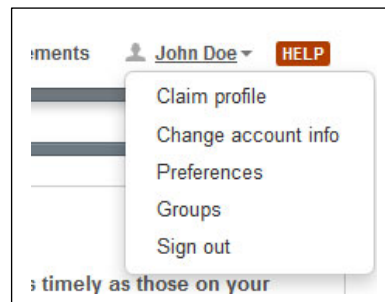
With Pivot users have the option to claim or create a researcher profile in order to get automated funding recommendations and alerts. Adviser Alerts appear on your Pivot homepage and are also emailed to you weekly. If desired, you can opt out of emails and you will still see the recommendations in the Adviser Alerts tab on the Pivot homepage.



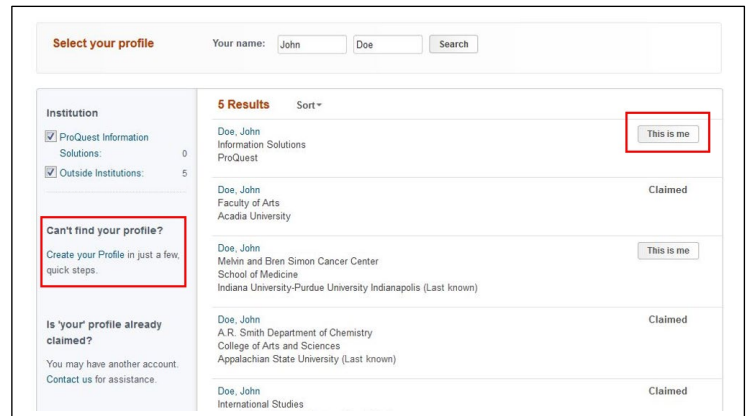
CLAIM YOUR PROFILE

In most cases, Pivot Editors will have already created a profile on your behalf. You will simply need to 'claim your profile' to begin getting automated recommendations.

1. Login to Pivot with your username/password
2. Under your name in the upper right, Click **Claim Profile**
3. On the Select your Profile look-up page you will be prompted to review a list of existing profiles to see if one matches your identity.
4. If you see yourself, click **This is Me**
5. If you don't see your profile, click **Create a Profile** or contact our Support team for assistance



After claiming or creating a Pivot profile you will begin to see Adviser Alerts recommendations on your Pivot homepage and via email. Alerts are updated and sent weekly.

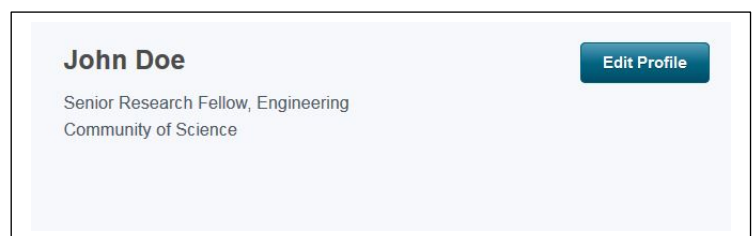


UPDATE YOUR PROFILE TO IMPROVE FUNDING RECOMMENDATIONS

By making just a few changes to your Pivot profile you can greatly improve the quality and breadth of recommendations that you receive via Adviser Alerts.

1. From the menu under your name, click **Your Profile**
2. On your profile page Click the blue **Edit Profile** button. The profile Editor will open in a new tab. Click Edit in the upper right.

The most important elements to update on your profile are your expertise statement, keywords and a link to a personal webpage or CV.



NEED ADDITIONAL SUPPORT?

Pivot provides key resources and helpful, short tutorial videos

DOCUMENTATION

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

RESOURCES & GUIDES

- [Pivot Claim Your Profile Bookmark](#)
- [Pivot Start Guide and Search Tips](#) (25 pages PDF)
- [Pivot YouTube Channel](#) (https://www.youtube.com/user/ProQuestPivot_)
 - [Getting Started Videos - user](#)

SUPPORT

If you have any questions, contact our [Support team](#).

