



CAMPBELL
UNIVERSITY

**Sponsored Research
& Programs**

Navigating Pivot-RP

**How to guide: step by step
instructions to create a
profile & search for
funding opportunities**

Office of Sponsored Research & Programs

Mission

- Provide a range of pre-award services for externally funded projects including
- Identification of potential funding sources,
- Direction of the grant application process,
- Support for adherence to a variety of compliance activities, and
- Provision of training and support.

Introduction-Pivot-RP

- Search and track funding opportunities
- Custom search and save funding opportunities.
- Email alerts:
 1. New funding opportunities.
 2. Approaching deadlines.



Learning Objectives

Participants will be able to:

- Create a PIVOT profile
- How to search for funding
- How to save, track & share opportunities



Step 1: Getting Started with Pivot

To create an account, go to <https://pivot.proquest.com/> and select Create account

Create an Account

- Select Use Email Address/Create Password
- Institution Email: Your Campbell Email Address
- Password: Campbell Password Preferred
- Affiliated Institution: Campbell University

*You will receive an email with a verification link.
Click the link to verify and access your account.

Log In

- Username: Campbell Email Address
- Password: *Recommended* Campbell Email Password

Step-1: (cont')

Locate your PIVOT-RP invitation from an OSRP representative.



Powered by Pivot and Research Professional

Dear Nivithasree Raghupathi Kothandaram,

K.Victoria Hyman created a Pivot-RP account on your behalf.

Your username is: n_raghupathi0319@email.campbell.edu

Your password must be created to finalize your account and access Pivot-RP.

Please click on the link below to add your password to your account. Once you submit the information, you may sign in to Pivot-RP to begin the process of discovering funding, receiving alerts, and finding collaborators.

[Create password!](#)

If you have trouble connecting to the password creation page or accessing Pivot-RP, please contact the [Help Desk](#).

Thanks,
The Pivot-RP Accounts Team

(** Would have been emailed to n_raghupathi0319@email.campbell.edu if on production. **)

Step-2: Claiming Profile

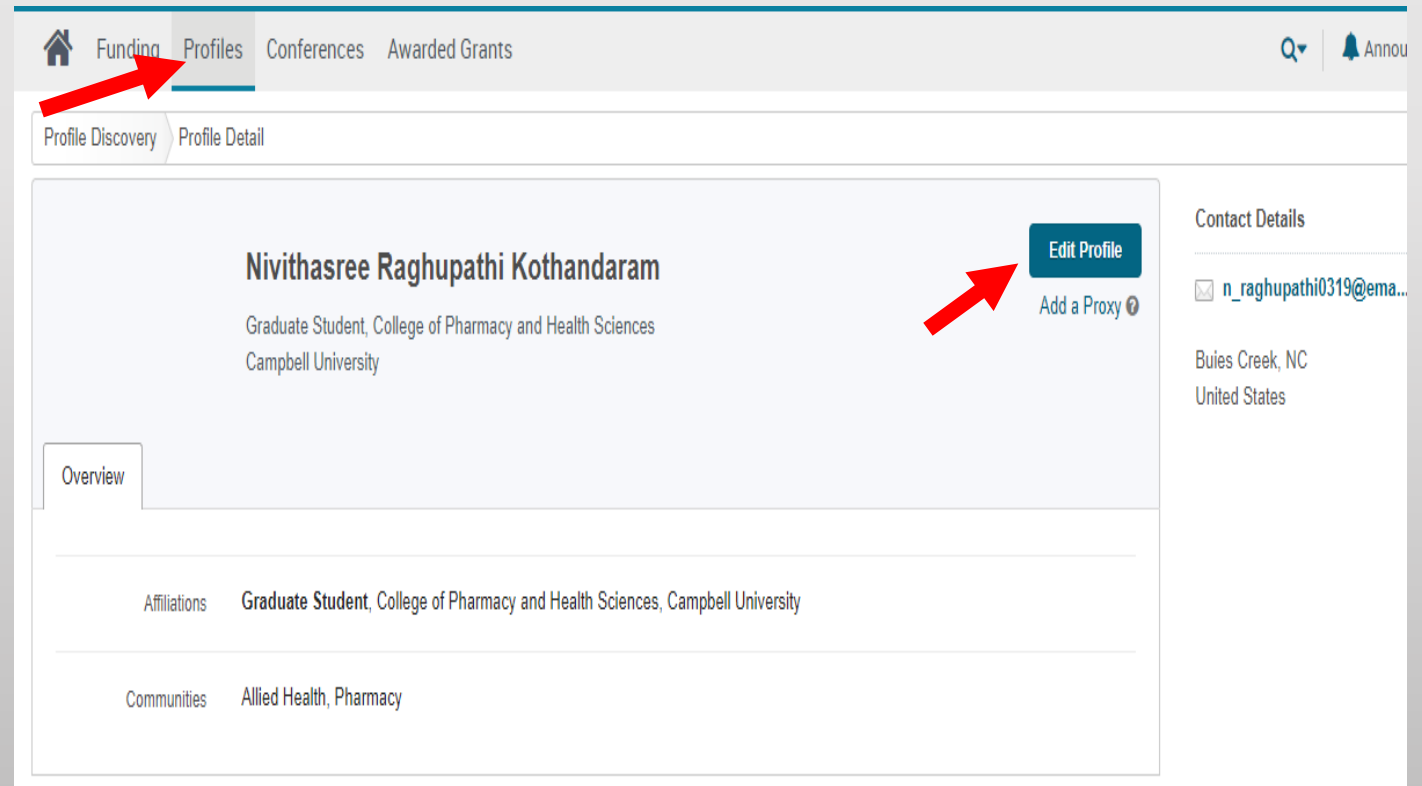
- Create account => Pivot RP's Claim your profile page

(this could be skipped and created later but it is recommended to claim and update your profile regularly)

- The pivot RP will show possible matching profiles based on the details provided and you can select your profile and claim it.
- If profile not found or do not have a profile you can create your profile under “Create your Profile” => enter all details manually including different names used to publish, personal websites or CV page, ORCID, ISNI, Education, Research focus/ Keywords, etc.

Step-3: Updating Profile

- After claiming your profile, it can be edited and updated anytime under “Profile” => “Edit”.
- One can also add
 1. Publication
 2. Grants
 3. Patents



Step 4: **Search for** **Funding**



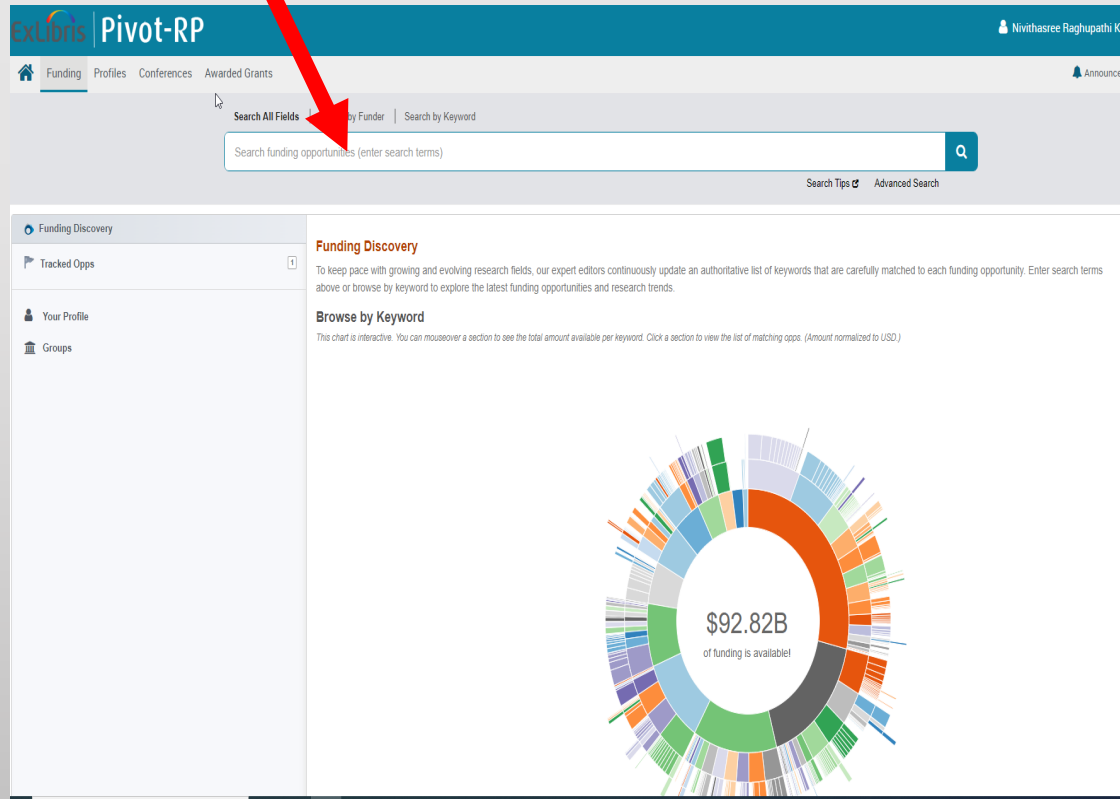
Two Ways to Search for Funding

I. Quick Search

II. Advanced Search

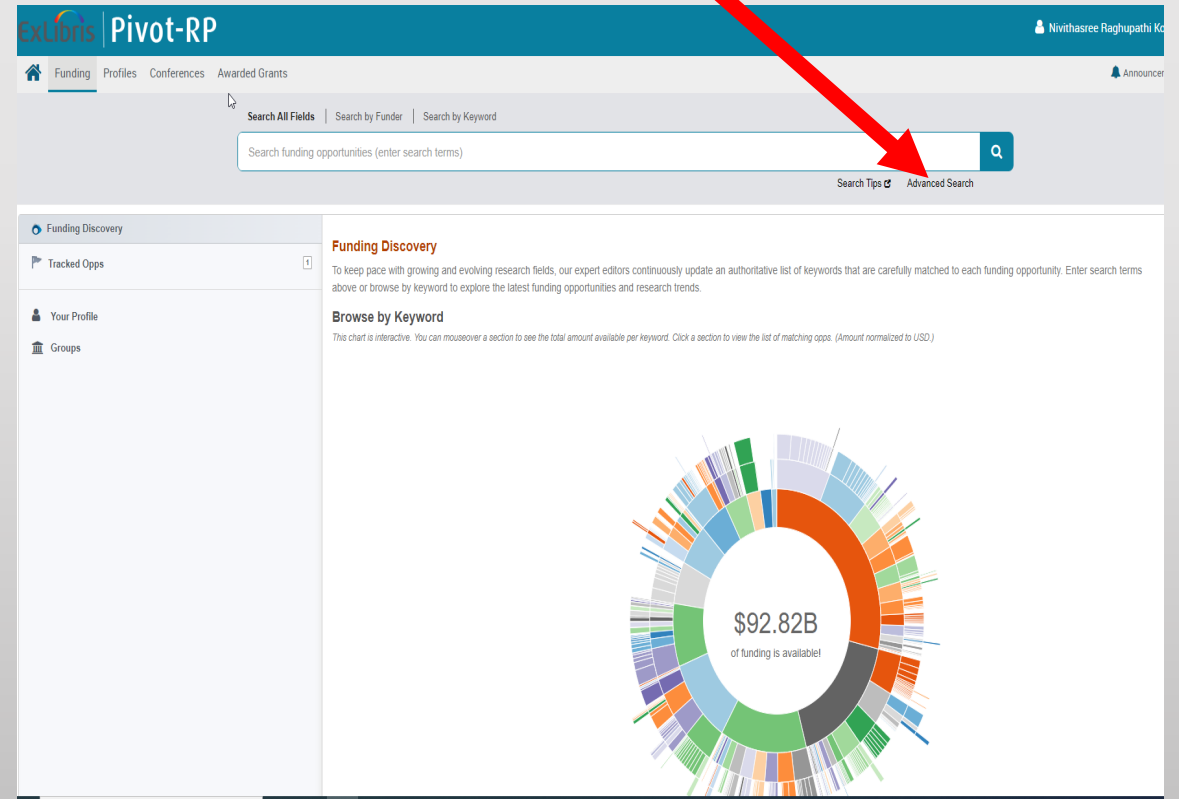
Step-4: Search For Funding

BASIC SEARCH



The screenshot shows the Pivot-RP website interface. The top navigation bar includes 'ExLibris', 'Pivot-RP', and a user profile 'Nivithasree Raghupathi K'. Below the navigation bar, there are tabs for 'Funding', 'Profiles', 'Conferences', and 'Awarded Grants'. A search bar is prominently displayed with the placeholder text 'Search funding opportunities (enter search terms)'. A red arrow points to the search bar. Below the search bar, there are links for 'Search Tips' and 'Advanced Search'. The main content area is titled 'Funding Discovery' and includes a section for 'Browse by Keyword' with a sunburst chart showing '\$92.82B of funding is available!'. The chart is interactive, allowing users to mouseover sections to see the total amount available per keyword and click sections to view the list of matching opportunities.

ADVANCED SEARCH

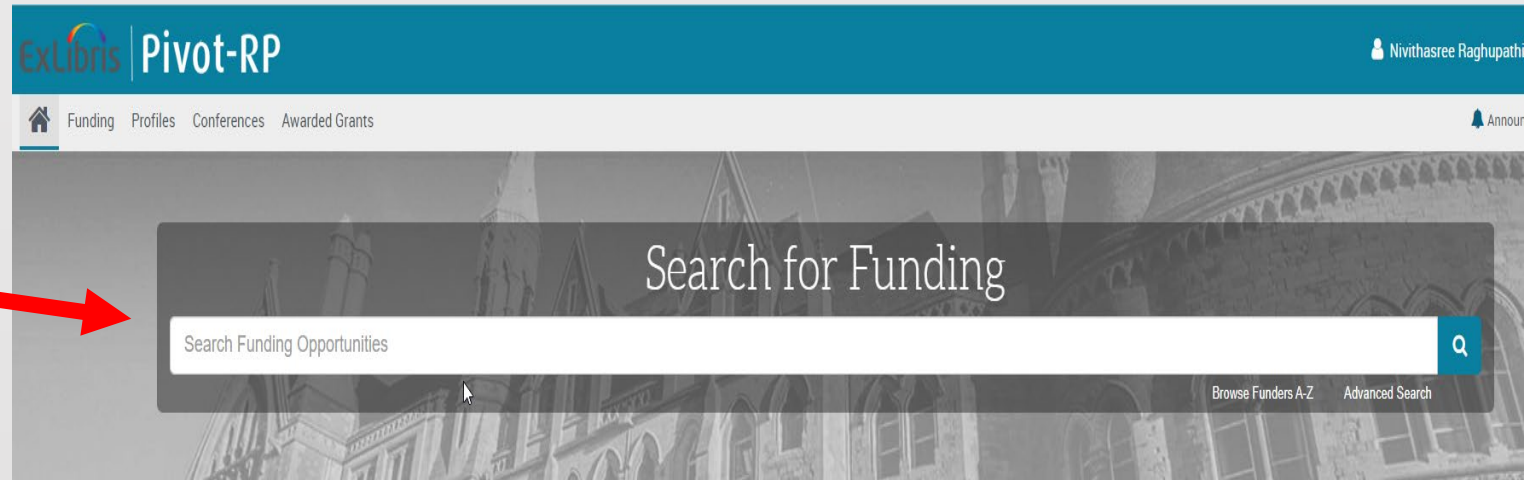


The screenshot shows the Pivot-RP website interface, identical to the basic search view. The top navigation bar includes 'ExLibris', 'Pivot-RP', and a user profile 'Nivithasree Raghupathi K'. Below the navigation bar, there are tabs for 'Funding', 'Profiles', 'Conferences', and 'Awarded Grants'. A search bar is prominently displayed with the placeholder text 'Search funding opportunities (enter search terms)'. A red arrow points to the search bar. Below the search bar, there are links for 'Search Tips' and 'Advanced Search'. The main content area is titled 'Funding Discovery' and includes a section for 'Browse by Keyword' with a sunburst chart showing '\$92.82B of funding is available!'. The chart is interactive, allowing users to mouseover sections to see the total amount available per keyword and click sections to view the list of matching opportunities.

Step-4: Search For Funding

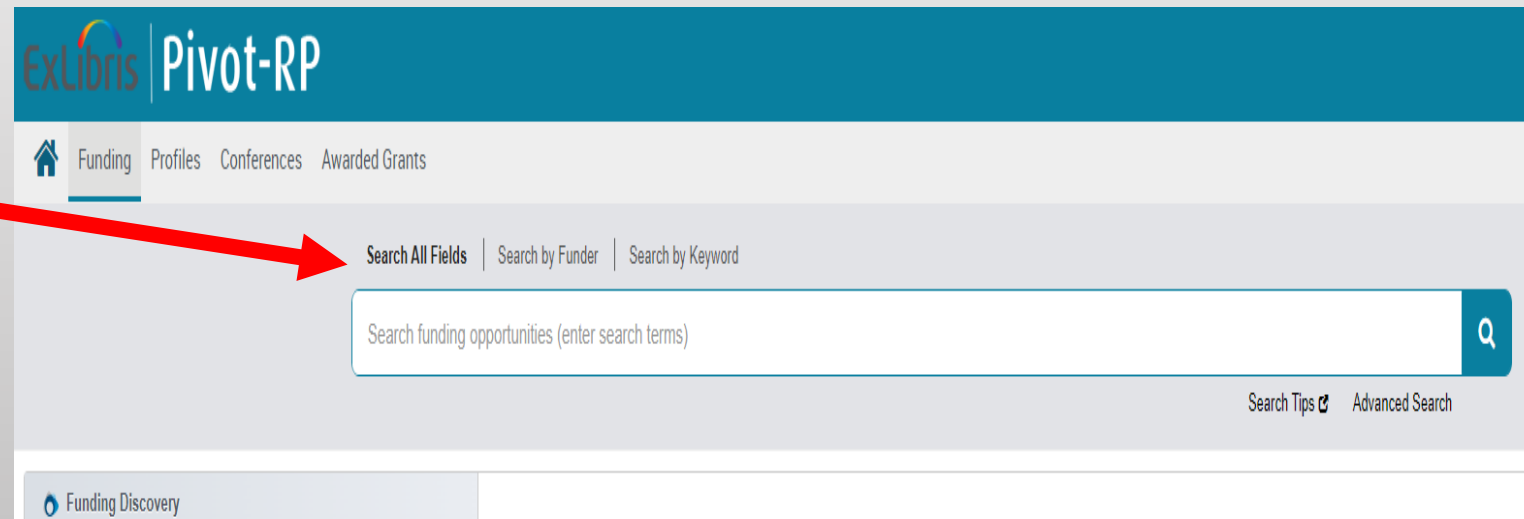
Basic search:

1. Search directly in the search bar in the home page
2. Clicking on the funding tab



Funding tabs has:

1. Search by fields
2. Search by funder
3. Search by keyword



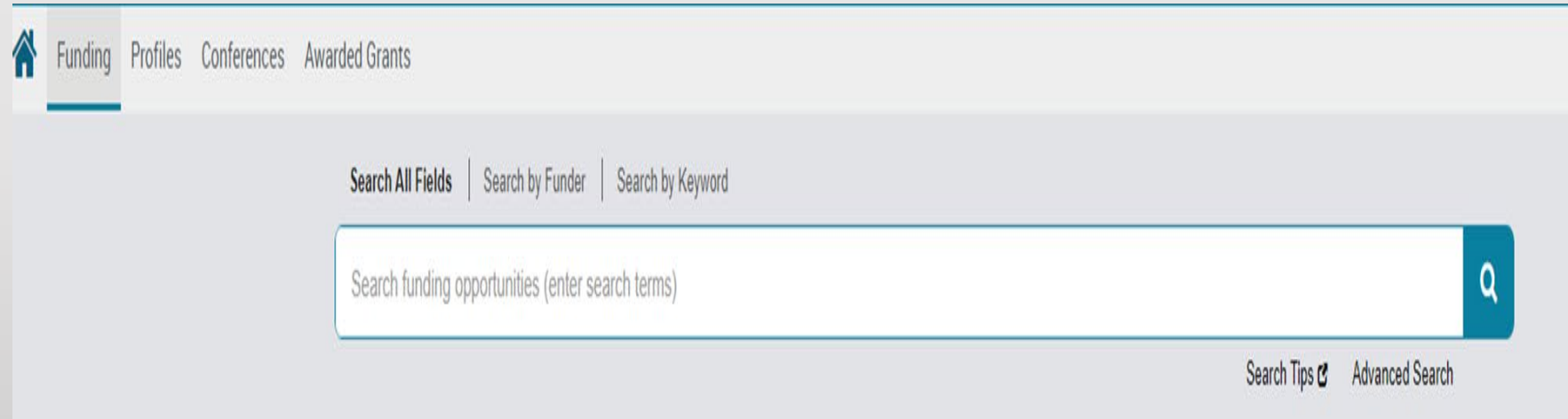
Note: Search tabs also supports the Boolean queries ("and", "or"), phrased searching (in quotes), proximity searching (xxxx w/2 xxxxx).

STEP-4: SEARCH FOR FUNDING

BASIC SEARCH

SEARCH BY FIELDS

- Enter the field of research. Eg: neurology
- You can filter your search results to further narrow down your search results.



The screenshot shows a search interface with a navigation bar at the top containing a home icon and links for 'Funding', 'Profiles', 'Conferences', and 'Awarded Grants'. Below this is a search section with three tabs: 'Search All Fields', 'Search by Funder', and 'Search by Keyword'. A large search input field is present with the placeholder text 'Search funding opportunities (enter search terms)'. To the right of the input field is a blue search button with a magnifying glass icon. At the bottom right of the search section, there are links for 'Search Tips' and 'Advanced Search'.

STEP-4: SEARCH FOR FUNDING

BASIC SEARCH

SEARCH BY FUNDERS

- Search the name of the funding source or organization directly.
- Organizations are categorized and available under **“all funders A-Z”** below the search tab.
- Funders are also be categorized and searched as **“U.S. Government funders and non-U.S. Government funders”**.



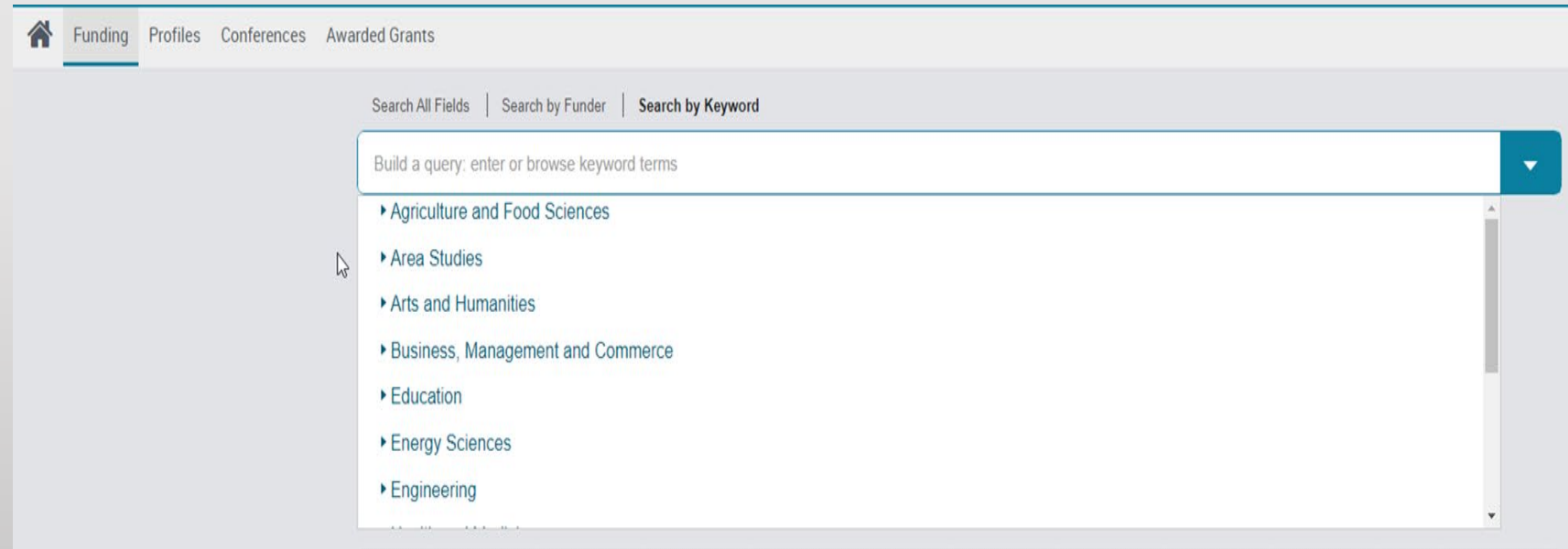
The screenshot displays a web interface for searching funders. At the top, a navigation bar includes a home icon and four tabs: 'Funding' (which is highlighted with a blue underline), 'Profiles', 'Conferences', and 'Awarded Grants'. Below this, there are three search options: 'Search All Fields', 'Search by Funder' (which is selected), and 'Search by Keyword'. A large search input field is present with the placeholder text 'Enter Funder name' and a blue search button icon on the right. At the bottom of the interface, there are four filter links: 'All Funders A-Z', 'U.S. Government Funders', 'Non U.S. Government Funders', and 'Advanced Search'.

STEP-4: SEARCH FOR FUNDING

BASIC SEARCH

SEARCH BY KEYWORDS

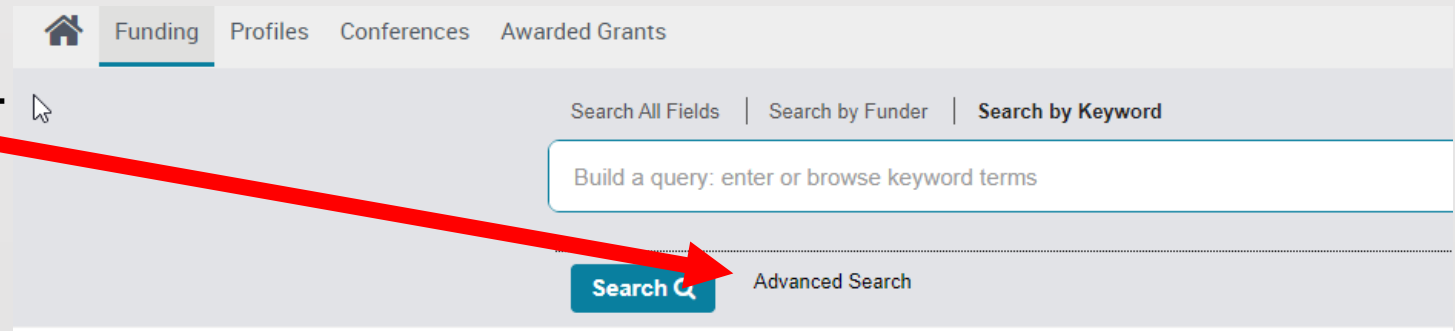
- You can **select keywords denoting your research** from the drop-down menu or type the keyword in the search tab to receive exact/ related field within the hierarchy for funding.



The screenshot displays a web application interface for searching funding opportunities. At the top, there is a navigation bar with tabs: 'Funding' (selected), 'Profiles', 'Conferences', and 'Awarded Grants'. Below this, a search bar is visible with three tabs: 'Search All Fields', 'Search by Funder', and 'Search by Keyword' (selected). The search bar contains the placeholder text 'Build a query: enter or browse keyword terms'. A dropdown menu is open, showing a list of research fields with a scroll bar on the right. The fields listed are: Agriculture and Food Sciences, Area Studies, Arts and Humanities, Business, Management and Commerce, Education, Energy Sciences, and Engineering. A mouse cursor is pointing at the 'Area Studies' option.

Step-4: Search for funding

Advanced Search:



The screenshot shows a web application interface with a navigation bar at the top containing links for Home, Funding, Profiles, Conferences, and Awarded Grants. Below the navigation bar, there are three search options: Search All Fields, Search by Funder, and Search by Keyword. A text input field is present with the placeholder text "Build a query: enter or browse keyword terms". Below the input field, there is a blue button labeled "Search" and a link labeled "Advanced Search". A red arrow points from the "Advanced Search" link to the "Search" button.

- Advanced search options consist of several pre-search filters to make the search narrow and more specific.
- Some of the universities has institutional filters for location or citizenship set by the institution's pivot administrator.
- All search results can be saved and reviewed later without reentering the entire search criteria.

Funding Advanced Search

Find Opportunities matching

☒ Match *all* of the fields

☐ Match *any* of the fields

Search

Clear All

and or or

and or or

and or or

[+Add another row](#)

Clear

- Funder
- Amount
- Deadlines
- Limited Submission
- Applicant/Institution Location
- Activity Location
- Citizenship
- Funding Type
- Keyword
- Applicant Type
- Funder Type
- Country of Funder
- Recently Added

- Start by selecting the **“match all”** or **“match any”** button at the top of the screen. This selection will add Boolean filters **“and”** or **“or”** to the search rows beneath the option.

Exclude Opportunities matching

☐ Match *all* of the fields

☒ Match *any* of the fields

or not or or

[+Add another row](#)

Clear

- Funder
- Deadlines
- Limited Submission
- Applicant/Institution Location
- Activity Location
- Citizenship
- Funding Type
- Keyword
- Applicant Type
- Funder Type
- Country of Funder

Search

Clear All

Funding Advanced Search

Find Opportunities matching

☒ Match *all* of the fields

☐ Match *any* of the fields 

Search

Clear All

and or or

and or or

and or or

[+Add another row](#)

Clear

- Funder
- Amount
- Deadlines
- Limited Submission
- Applicant/Institution Location
- Activity Location
- Citizenship
- Funding Type
- Keyword
- Applicant Type
- Funder Type
- Country of Funder
- Recently Added

- Click on the **drop-down menu** to select which field to search (all fields, abstract, title, sponsor, or sponsor id).

Exclude Opportunities matching

☐ Match *all* of the fields

☒ Match *any* of the fields 

or not or or

[+Add another row](#)

Clear

- Funder
- Deadlines
- Limited Submission
- Applicant/Institution Location
- Activity Location
- Citizenship
- Funding Type
- Keyword
- Applicant Type
- Funder Type
- Country of Funder

Search

Clear All

Funding Advanced Search

Find Opportunities matching

☒ Match *all* of the fields

☐ Match *any* of the fields ?

Search

Clear All

and or or

and or or

and or or

[+ Add another row](#)

Clear

▸ Amount

▸ Deadlines

▸ Limited Submission

▸ Applicant/Institution Location

▸ Activity Location

▸ Citizenship

▸ Funding Type

▸ Keyword

▸ Applicant Type

▸ Funder Type

▸ Country of Funder

▸ Recently Added

- Enter your search terms into the boxes. If additional rows are needed, click “**add another row**”.

Funding Advanced Search

Find Opportunities matching

☒ Match *all* of the fields

☐ Match *any* of the fields ⓘ

Search

Clear All

and or or

and or or

and or or

[+Add another row](#)

Clear

► Funder

► Amount

► Deadlines

► Limited Submission

► Applicant/Institution Location

► Activity Location

► Citizenship

► Funding Type

► Keyword

► Applicant Type

► Funder Type

► Country of Funder

► Recently Added

- Additional fields are available – **click on any field name to expand the field options** to further narrow down the search.
- Click **“search”**

Exclude Opportunities matching

☐ Match *all* of the fields

☒ Match *any* of the fields ⓘ

or not or or

[+Add another row](#)

Clear

► Funder

► Deadlines

► Limited Submission

► Applicant/Institution Location

► Activity Location

► Citizenship

► Funding Type

► Keyword

► Applicant Type

► Funder Type

► Country of Funder

Search

Clear All

Search results

- On top of the search list Pivot RP list the criteria of the search conducted.
- You can save the search criteria by clicking the “save search” option listed on the results page to save all the search conditions listed.
- “Save search” option also allows you **to receive updates on latest funding opportunities** on the specified search criteria.

The screenshot shows the 'Search Funding Results' page for the query 'genetics'. A red arrow points to the 'Save Search' link in the top navigation bar. The page displays a list of 616 results, including the 'Genetics Prize' and 'William Allan Award'. The left sidebar shows filters for 'Recently added', 'Submission type', 'Top funding types', and 'Top sponsor types'.

Recently added	Submission type	Top funding types	Top sponsor types
Last 7 days: 1	Limited Submission: 19	Research: 430	Other Nonprofit: 172
	Other internal coordin...: 4	Training or Scholarshi...: 153	
		Prize or Award: 70	
		Postdoctoral Award: 69	
		Collaboration or Coope...: 50	



The 'Save your search' dialog box is shown, prompting the user to choose a name for their search and whether they want to receive weekly email updates. The 'Save' button is highlighted.

Save your search

Choose a name for your search:

☒ Would you like to receive a weekly email containing new or updated opps from this query?

Cancel Save

STEP 5: SAVING, TRACKING & SHARING

TRACKING
SAVING
SHARING

The screenshot displays a web application interface for managing funding opportunities. The top navigation bar includes links for [Funding](#), [Profiles](#), [Conferences](#), and [Awarded Grants](#). On the right, there are search and announcement icons, and a [HELP](#) button. A [Calendar View](#) button is located in the top right corner of the main content area.

The left sidebar contains a list of filters, each with a count in a small box:

- [Tracked](#) (1)
- [Saved Searches](#) (1)
- [Shared](#)
- [Received](#)
- [Advisor](#)

Below the filters is a [Hide filters](#) link. A section titled **Type** with a [clear](#) link contains the following options:

- ☒ Limited Submission (0)
- ☒ Internal Coordination (0)
- ☒ Other (1)
- ☐ Expired (0)

The main content area displays a list of tracked opportunities. The first entry is:

<input type="checkbox"/>	Tracked Opps (1)	Sort	Deadline
<input type="checkbox"/>	Michael S. Pessin Stroke Leadership Prize		28 Oct 2022
			Application Anticipated

A context menu is open over the first entry, showing the following options:

- [Share](#)
- [Untrack](#)
- [Add Tags](#)
- [Add to calendar](#)
- [Turn Alert email off](#)
- [Add Deadline Reminder](#)
- [Who you shared with](#)
- [Who else is interested](#)

Step 5: Saving, Tracking & Sharing

1. Saving your search result:

- From the search results page, click on **Save Search** at the top of the page.
- Enter a name for your saved search in the text box.
- Indicate whether or not you would like to receive a weekly alert email with new or updated opportunities from this query, using the checkbox.
- The saved search page consist of columns that shows newer funding opps added to the search result, total number of opps in the particular search and whether email alerts are set for the search result.
- The drop down menu also consist of option that allows you to share, edit , add/remove tags and many more to option to organize the search.

The screenshot shows the 'Saved Searches' section of a web application. On the left is a sidebar with navigation links: Tracked (2), Saved Searches (2), Shared, Received, and Advisor. The main area is titled 'Saved Searches (2)' and contains a table with two rows. The first row is for an 'Advisor Alert' search, and the second row is for a search named 'public health'. The table has columns for 'New Results for Jan 09 2022', 'All Results', and 'Email alerts'. Red arrows point to these columns. An 'Options' dropdown menu is open for the 'public health' search, showing options like Share, Rename, Edit, Add Tags, View archived results, Alert email off, and Delete this search.

	New Results for Jan 09 2022	All Results	Email alerts	
Advisor Alert	0 / 0	0 / 0	<input type="checkbox"/>	Options ▾
public health	0 / 0	22 / 1	<input type="checkbox"/>	Options ▾

- Share
- Rename
- Edit
- Add Tags
- View archived results
- Alert email off
- Delete this search

Step 5: Saving, Tracking & Sharing

2. Tracking funding opportunities:

- Tracking funding opportunities will help you with tracking deadlines to apply for funding and also alerts you on updated eligibility criteria
- You can track an opportunity by
- Selecting on the **preferred funding opportunity and selecting track** on the top right corner or
- From the search results page by **selecting which opportunities to save**=> Click the box beside Results => Click **Track or Set to Active**

The screenshot shows the ExLibris Pivot-RP website interface. The top navigation bar includes the ExLibris logo, the text 'Pivot-RP', and a user profile 'divyasree ragupathi kothandaram'. Below this is a secondary navigation bar with tabs for 'Funding', 'Profiles', 'Conferences', and 'Awarded Grants'. A search bar and 'Announcements' link are also present. The main content area shows a breadcrumb trail: 'Funding Discovery > Funding Search Results > Funding Opp Detail'. The title of the funding opportunity is 'Systems of sustainable consumption and production'. Below the title, it says 'Opp ID: 096e6c6e-b6b1-4aa0-a12b-f2f1552f7976 | Research: Project Grants & Innovation | Last published on 28 Jun 2022'. A 'Full Details' button is visible. On the right side, there is a sidebar with a red arrow pointing to the 'Track' button, which is accompanied by a flag icon. Below 'Track' are links for 'Share', 'Dismiss Opportunity', 'See more opps like this', and 'Send feedback'. At the bottom of the sidebar is a section for 'Potential Collaborators'. The footer shows the website URL 'https://bfgo.org/'.

ExLibris | Pivot-RP

divyasree ragupathi kothandaram

Funding Profiles Conferences Awarded Grants

Funding Discovery Funding Search Results Funding Opp Detail

Systems of sustainable consumption and production

Opp ID: 096e6c6e-b6b1-4aa0-a12b-f2f1552f7976 | Research: Project Grants & Innovation | Last published on 28 Jun 2022

Full Details

Website <https://bfgo.org/>

Track

Share

Dismiss Opportunity

See more opps like this

Send feedback

Potential Collaborators

Step 5: Saving, Tracking & Sharing

2. Tracking funding opportunities(cont')

- Tracked opportunities are sorted by the earliest deadlines.
- Tracked opportunities can also be sorted alphabetically (Sort =>Titles)
- Tracked opportunities can also be filtered and tags can be added to access the required funding opportunities easily.

Step 5: Saving, Tracking & Sharing

3. Sharing funding opportunities:

- Shared tab show us the opportunities that have been shared with other researchers. The shared tab consists of the deadlines of the funding opportunities and also the number of recipients that the opportunity was shared
- Received opportunities can be viewed in the received tab.
- The received opportunities can be added to the tracked or active list or dismissed or remove it.

The screenshot displays a research management interface. On the left, a sidebar contains navigation tabs: 'Tracked' (2), 'Saved Searches' (2), 'Shared', 'Received', and 'Advisor'. Red arrows point to the 'Shared' and 'Received' tabs. The main area shows a table titled 'Saved Searches (2)'. The table has columns for 'New Results for Jan 09 2022', 'All Results', and 'Email alerts'. The first row is for 'Advisor Alert' with 0/0 results. The second row is for 'public health' with 0/0 results and 25/1 in the 'All Results' column. A red arrow points to the 'Options' dropdown for the 'public health' search, which includes options like 'Share', 'Rename', 'Edit', 'Add Tags', 'View archived results', 'Alert email off', and 'Delete this search'.

	New Results for Jan 09 2022	All Results	Email alerts
Advisor Alert	0 / 0	0 / 0	Options
public health	0 / 0	25 / 1	Options

Step 5: Saving, Tracking & Sharing

Basic Sharing of Funding

1. Log in to your **Pivot account** and click **Saved Searches** from the home page.
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**.

The screenshot shows the Pivot account interface. The top navigation bar includes links for Funding, Profiles, Conferences, and Awarded Grants. The left sidebar contains a list of search categories: Tracked, Saved Searches (circled in red), Shared, Received, and Advisor. The main content area displays 'Saved Searches (2)' with a table of results. The table has columns for 'New Results for Jan 23 2022', 'All Results', and 'Email alerts'. The first search is 'Advisor Alert' with 0/0 results. The second search is 'public health' with 23/0 results. The 'Options' menu for the 'public health' search is open, showing options like 'Share' (circled in red), 'Rename', 'Edit', 'Add Tags', 'View archived results', 'Alert email off', and 'Delete this search'.

Search Name	New Results for Jan 23 2022	All Results	Email alerts
Advisor Alert	0 / 0	0 / 0	<input type="checkbox"/> Options
public health	23 / 0	32 / 0	<input type="checkbox"/> Options

Step 5: Saving, Tracking & Sharing

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.
5. Click **Send**.

The screenshot shows the 'Epidemiology Grants' page on the Alex's Lemonade Stand Foundation (ALSF) website. The page is part of a navigation menu with 'Funding', 'Profiles', 'Conferences', and 'Awarded Grants'. The 'Funding' tab is active, and the 'Funding Search Results' sub-tab is selected. The main content area displays the 'Epidemiology Grants' opportunity, with the ID '9845896d-0fec-415c-88b2-d1d75de8f0f3' and the research focus 'Project Grants & Innovation'. The page was last edited on 02 Dec 2021. A 'Full Details' tab is visible. The 'Share' button is circled in red. The right sidebar shows options to 'Track' and 'Share' the opportunity, along with links to 'See more opps like this' and 'Send feedback'. Below this, it shows 'Potential Collaborators' with 124 from inside the institution and 500+ from outside institutions. At the bottom, the 'Funding Contact Person' is listed as Judy Oliver with the email 'Grants@AlexsLemonade.org'.

Website <http://www.alexslimonade.org/grants/guidelines>

Funder Alex's Lemonade Stand Foundation for Childhood Cancer (ALSF)

Funder Type Private Foundation or Non-Profit

Country of Funder United States

Amount Upper: \$200,000 usd
Funding for two years, maximum of \$100,000 per year, may be requested for direct costs. ALSF's budget template must be used. Written justification is required. Budget may include items such as salary, fringe, supplies, and travel

Track

Share

See more opps like this

Send feedback

Potential Collaborators

124 from inside your institution

500+ from outside institutions

Funding Contact Person

Judy Oliver
Grants@AlexsLemonade.org

Step 5: Saving, Tracking & Sharing

From A Funding Results Page

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

The screenshot shows the 'Funding Search Results' page. At the top, there's a navigation bar with 'Funding' selected. Below it, a search bar shows 'Your Search: (epidemiology)'. On the left, there's a sidebar with filters like 'Recently added' and 'Submission type'. The main area displays a list of funding opportunities. The first opportunity, 'Spain: Epidemiology and Public Health at the Universidad de Murcia', has its 'Share' button circled in red. The second opportunity is 'Rebecca James Baker award'.

Recently added	
Filter	Count
Last 30 days	54
Last 14 days	20
Last 7 days	9

Submission type	
Type	Count
Limited Submission	20
Other internal coordination r...	1

Deadline Certainty	
Certainty	Count
Anticipated	222
Confirmed	141

Action Buttons	
Track	Share
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Opportunity	Deadline	Amount
Spain: Epidemiology and Public Health at the Universidad de Murcia	15 Sep 2023	€9,600 EUR
Rebecca James Baker award	30 Mar 2023	see record

Step 5: Saving, Tracking & Sharing

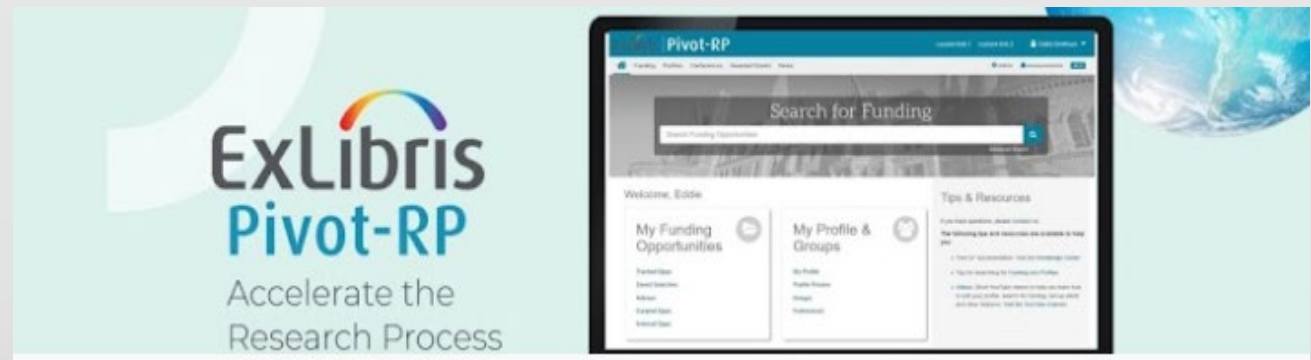
From Your Active or Track List

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

The screenshot shows the Pivot-RP ExLibris interface. The top navigation bar includes 'Funding', 'Profiles', 'Conferences', and 'Awarded Grants'. The user is logged in as Nivithasree Raghupathi Kothandaram. The left sidebar shows a list of filters: 'Tracked' (2), 'Saved Searches' (2), 'Shared', 'Received', and 'Advisor'. The main content area displays a table of tracked opportunities. The first opportunity is 'Michael S. Pessin Stroke Leadership Prize' with a deadline of 28 Oct 2022. The second is 'Alumni activity grants' with a deadline of 04 Oct 2022. A context menu is open for the first opportunity, with the 'Share' option highlighted by a red circle. Other options in the menu include 'Untrack', 'Add Tags', 'Add to calendar', 'Turn Alert email off', 'Add Deadline Reminder', 'Who you shared with', and 'Who else is interested'.

	Tracked Opps (2)	Sort	Deadline
	Michael S. Pessin Stroke Leadership Prize		28 Oct 2022
			Application
			Anticipated
	Alumni activity grants		04 Oct 2022
			Application
			Anticipated

Pivot- RP Videos



<https://www.youtube.com/user/ProQuestPivot/videos>