



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

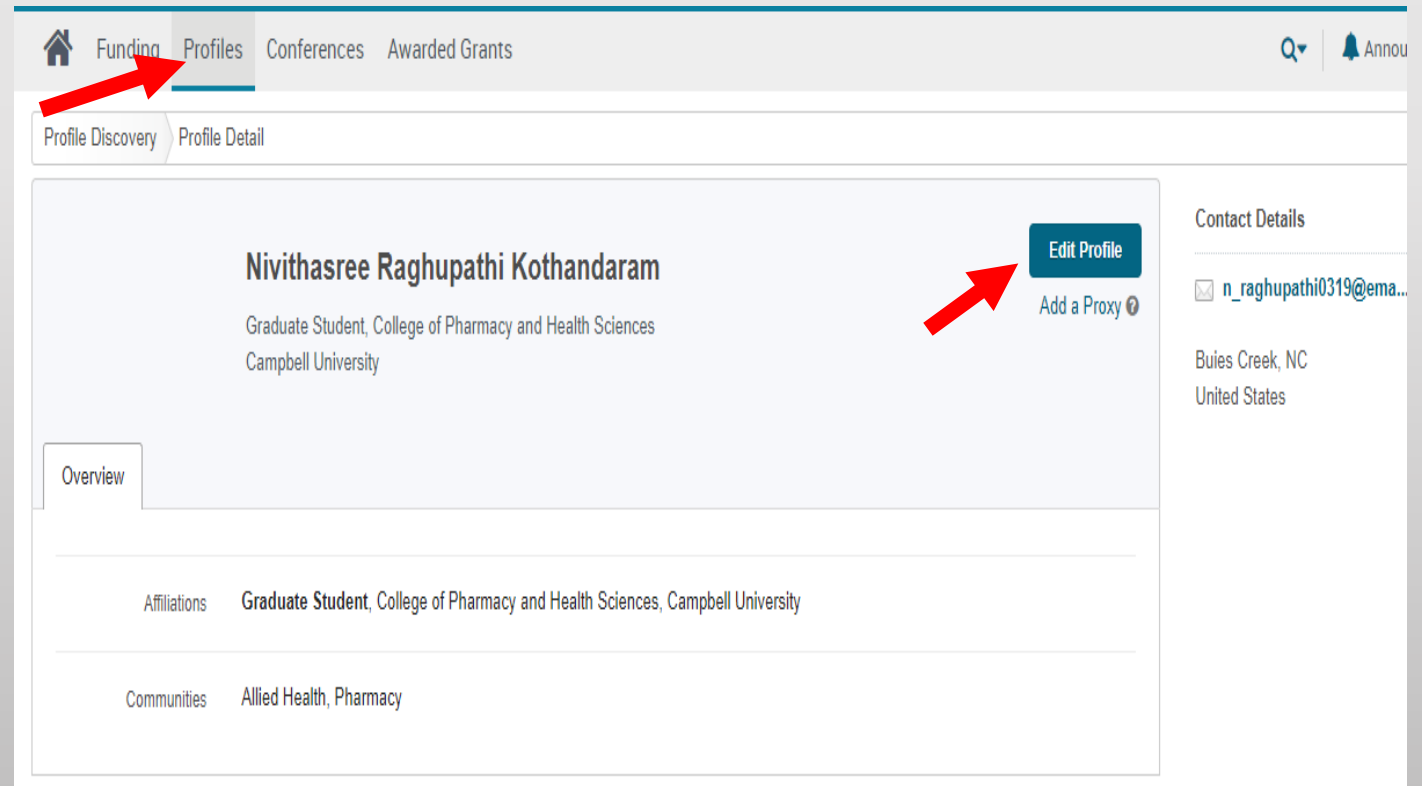
- Create account => Pivot RP's Claim your profile page

(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



The screenshot shows a user profile page for Nivithasree Raghupathi Kothandaram. The navigation bar at the top includes 'Funding', 'Profiles', 'Conferences', and 'Awarded Grants'. A red arrow points to the 'Profiles' menu item. Below the navigation bar, there are tabs for 'Profile Discovery' and 'Profile Detail'. The main content area displays the user's name, affiliation (Graduate Student, College of Pharmacy and Health Sciences, Campbell University), and a blue 'Edit Profile' button. A second red arrow points to this button. To the right of the main content, there is a 'Contact Details' section with an email address (n_raghupathi0319@ema...), location (Buies Creek, NC, United States), and a search icon.

Step 4:
Search for
Funding

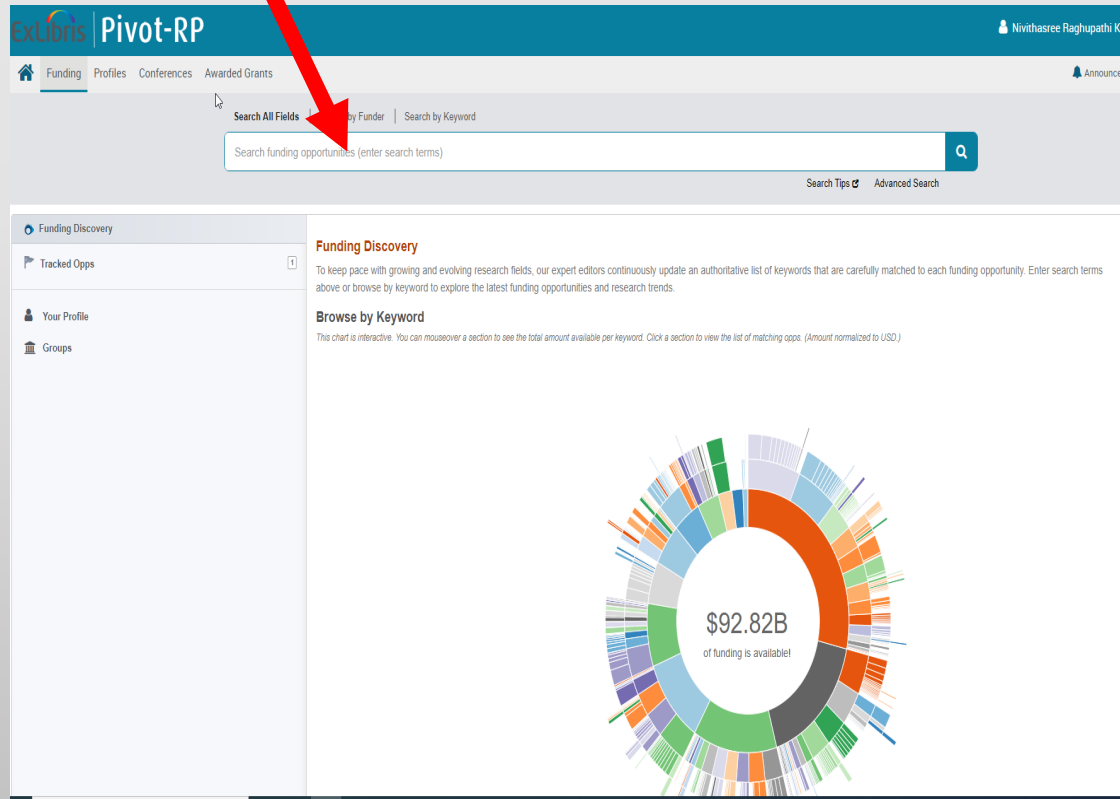


**Two Ways to Search
for Funding**

- I. Quick Search**
- II. Advanced Search**

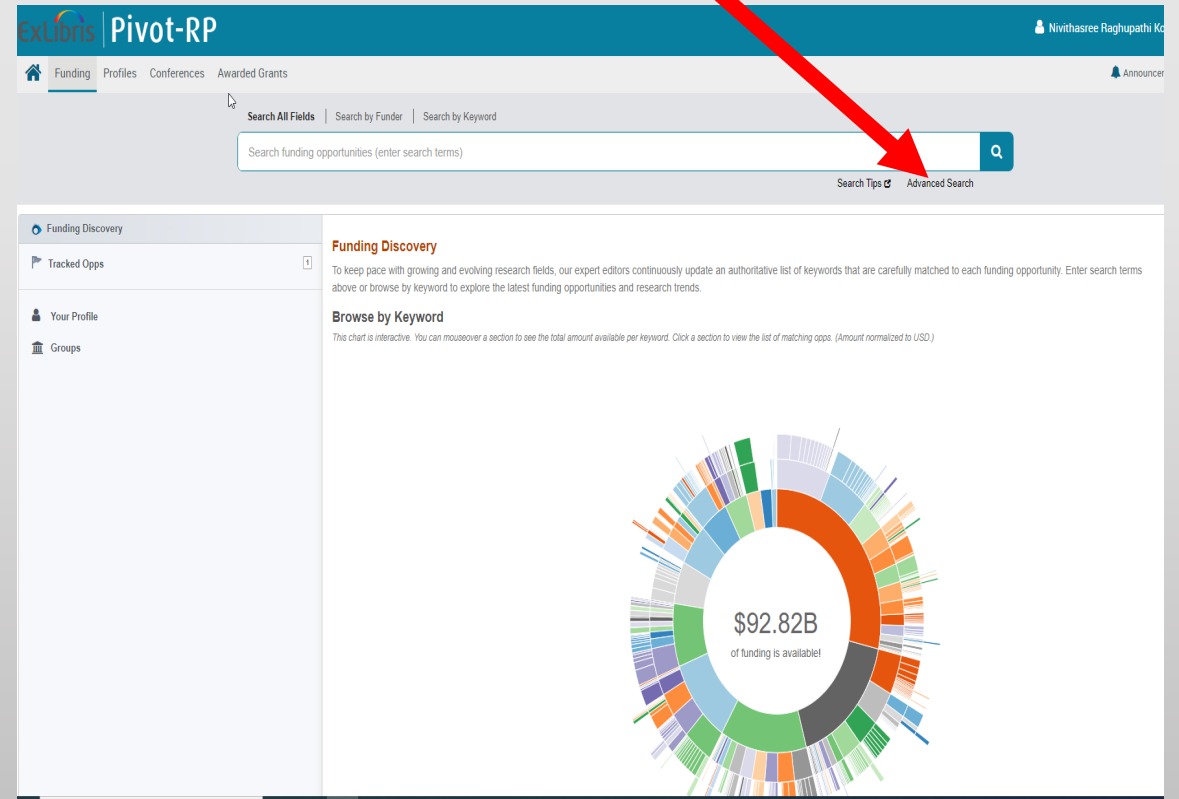
Step-4: Search For Funding

BASIC SEARCH



The screenshot shows the Pivot-RP website interface. At the top, there is a navigation bar with the logo '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 text 'Search All Fields' and 'Search by Keyword'. A red arrow points to the search bar. Below the search bar, there is a search button with a magnifying glass icon. The main content area is titled 'Funding Discovery' and includes a 'Tracked Opps' section, 'Your Profile', and 'Groups'. A large circular sunburst chart is displayed, showing a total of '\$92.82B of funding is available!'. The chart is divided into various colored segments representing different funding categories.

ADVANCED SEARCH

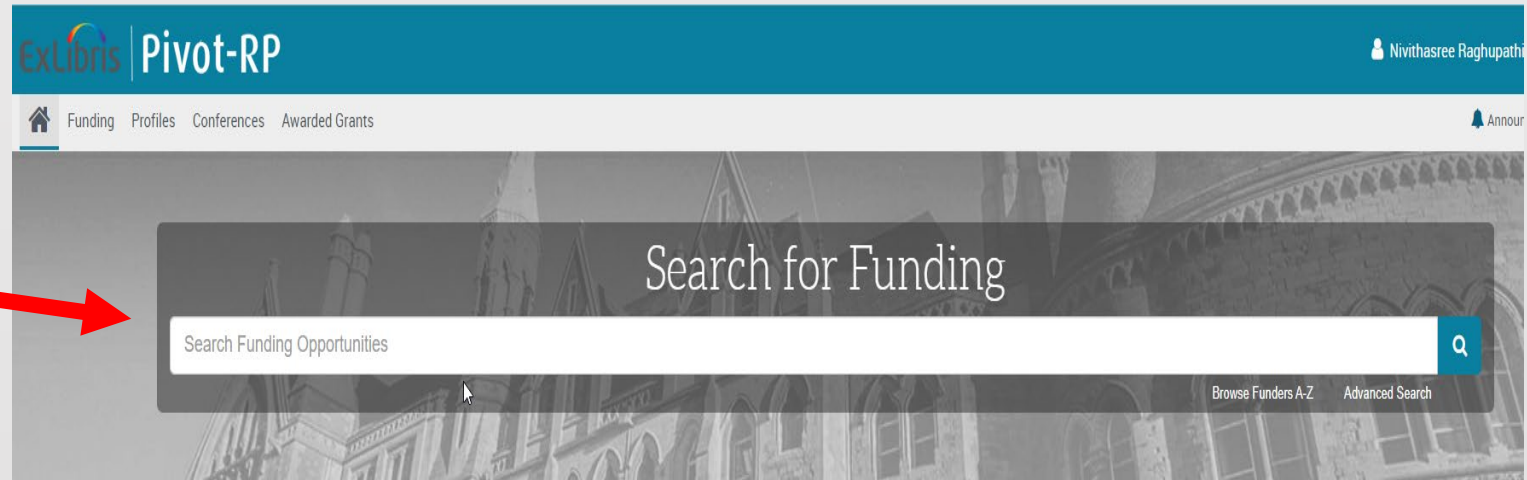


The screenshot shows the Pivot-RP website interface, identical to the basic search view. A red arrow points to the search bar. The main content area is titled 'Funding Discovery' and includes a 'Tracked Opps' section, 'Your Profile', and 'Groups'. A large circular sunburst chart is displayed, showing a total of '\$92.82B of funding is available!'. The chart is divided into various colored segments representing different funding categories.

Step-4: Search For Funding

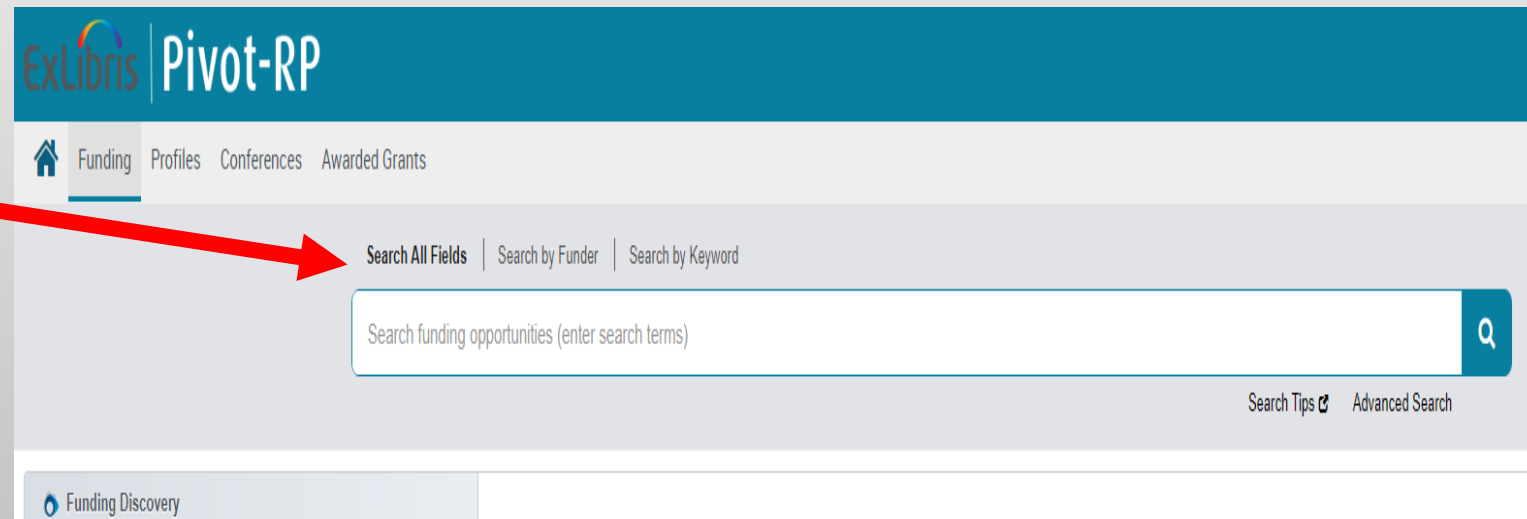
Basic search:

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



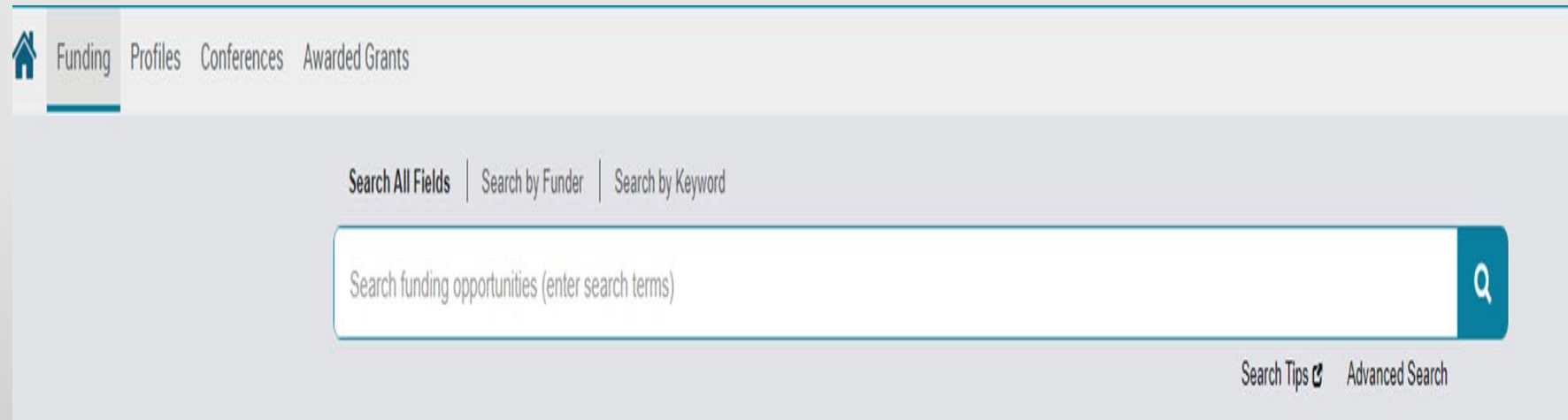
Note: Search tabs also supports the Boolean queries ("and", "or"), phrased searching (in quotes), proximity searching (xxxx w/2 xxxxx).

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 the navigation bar, there are three search options: 'Search All Fields', 'Search by Funder', and 'Search by Keyword'. A large search input field is centered, containing the placeholder text 'Search funding opportunities (enter search terms)'. To the right of the input field is a search button with a magnifying glass icon. At the bottom right of the search area, 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”**.



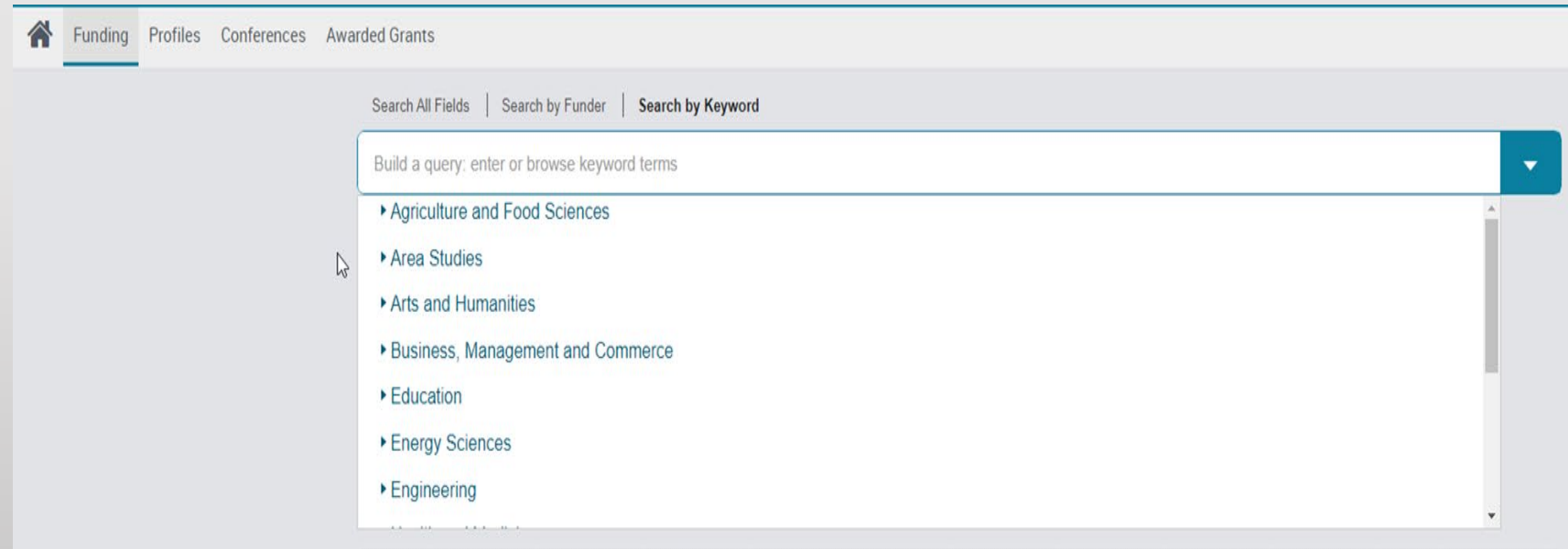
The screenshot shows a search interface with a navigation bar at the top containing a home icon and links for 'Funding', 'Profiles', 'Conferences', and 'Awarded Grants'. Below the navigation bar, there are three search options: 'Search All Fields', 'Search by Funder', and 'Search by Keyword'. A large search input field is present with the placeholder text 'Enter Funder name' and a magnifying glass icon on the right. Below the search field, there are four filter options: 'All Funders A-Z', 'U.S. Government Funders', 'Non U.S. Government Funders', and 'Advanced Search'.

STEP-4: SEARCH FOR FUNDING

BASIC SEARCH

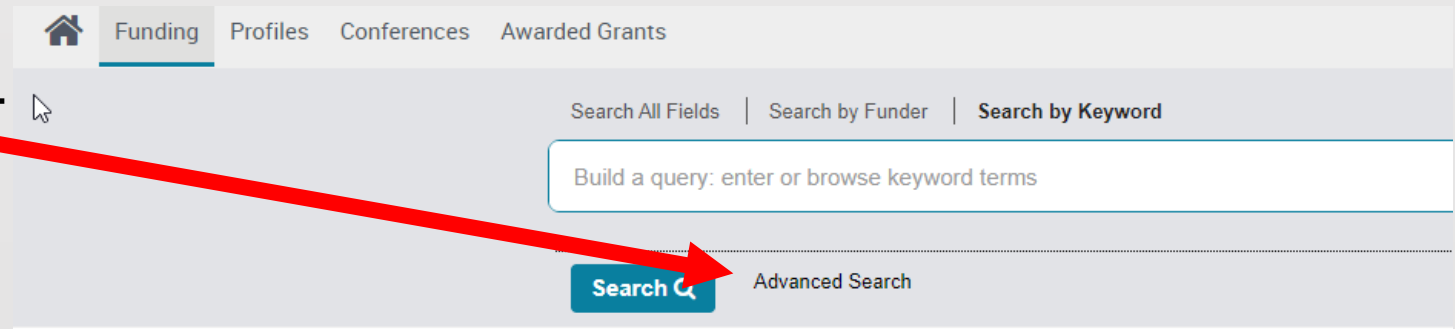
SEARCH BY KEYWORDS

- 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.



Step-4: Search for funding

Advanced Search:



- 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

and or or

and or or

and or or

[+ Add another row](#)

[Search](#) [Clear All](#)

[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 All Fields or or

and All Fields or or

and All Fields 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 results page for the query 'genetics'. At the top, there is a navigation bar with 'Funding' selected. Below the navigation bar, the search criteria are displayed as 'Your Search: (genetics)'. A red arrow points to the 'Save Search' button. The main content area shows a list of 616 results, with the first few entries visible:

	Deadline	Amount
Genetics Prize Peter and Patricia Gruber Foundation	15 Dec 2018 Application Anticipated	\$500,000 USD
William Allan Award American Society of Human Genetics (ASHG)	16 Apr 2019 Nomination Anticipated	\$25,000 USD
DeLill Nasser Award for Professional Development in Genetics Genetics Society of America (GSA)	01 Oct 2018 Application Anticipated	see record
Arno Motulsky-Barton Childs Award for Excellence in Human Genetics Education American Society of Human Genetics (ASHG)	16 Apr 2019 Nomination Anticipated	\$10,000 USD
Genetics and Public Policy Fellowship American Society of Human Genetics (ASHG)	27 Apr 2019 Application	\$72,000 USD

The screenshot shows a dialog box titled 'Save your search' with a close button (X) in the top right corner. The dialog box contains the following text and elements:

Choose a name for your search:

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

Buttons: Cancel, Save

STEP 5: SAVING, TRACKING & SHARING

TRACKING
SAVING
SHARING



Home Funding Profiles Conferences Awarded Grants Q Announcements HELP

Calendar View

Tracked 1

Saved Searches 1

Shared

Received

Advisor

Hide filters

Type clear

- Limited Submission 0
- Internal Coordination 0
- Other 1
- Expired 0

Tracked Opps (1) Sort

Michael S. Pessin Stroke Leadership Prize 28 Oct 2022 Options

Application
Anticipated

- 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 displays a web application interface with a navigation bar at the top containing 'Funding', 'Profiles', 'Conferences', and 'Awarded Grants'. On the right side of the navigation bar, there are icons for search, announcements, and a 'HELP' button. Below the navigation bar, there is a sidebar on the left with a list of search categories: 'Tracked' (2), 'Saved Searches' (2), 'Shared', 'Received', and 'Advisor'. The main content area is titled 'Saved Searches (2)' and contains a table with the following data:

	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 ▾

Red arrows point to the 'New Results for Jan 09 2022', 'All Results', and 'Email alerts' columns. A dropdown menu is open for the 'public health' search, showing the following options: Share, Rename, Edit, Add Tags, View archived results, Alert email off, and 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 for '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 primary heading is 'Systems of sustainable consumption and production', with a sub-heading '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, a vertical menu contains a 'Track' button (highlighted with a red arrow), a 'Share' button, 'Dismiss Opportunity', 'See more opps like this', 'Send feedback', and 'Potential Collaborators'. At the bottom, a 'Website' link points to 'https://bfgo.org/'.

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 user interface for managing research opportunities. On the left, a vertical navigation menu includes tabs for 'Tracked', 'Saved Searches', 'Shared', 'Received', and 'Advisor'. Red arrows point to the 'Shared' and 'Received' tabs. The main content area shows a table of 'Saved Searches' with columns for 'New Results for Jan 09 2022', 'All Results', and 'Email alerts'. The table lists two searches: 'Advisor Alert' and 'public health'. A context menu is open over the 'public health' search, with a red arrow pointing to the 'Share' option.

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

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

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 'Funding', 'Profiles', 'Conferences', and 'Awarded Grants'. The main content area is titled 'Saved Searches (2)'. On the left, there is a sidebar with navigation options: 'Tracked', 'Saved Searches', 'Shared', 'Received', and 'Advisor'. The 'Saved Searches' option is circled in red. The main area displays a table of saved searches. The first search is 'Advisor Alert' with 0 results. The second search is 'public health' with 23 results. The 'Share' option in the dropdown menu for the 'public health' search is circled in red.

Tracked	Saved Searches (2)	New Results for Jan 23 2022	All Results	Email alerts
	Advisor Alert	0 / 0	0 / 0	Options
	public health	23 / 0	32 / 0	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. The navigation bar includes 'Funding', 'Profiles', 'Conferences', and 'Awarded Grants'. The breadcrumb trail is 'Funding Discovery > Funding Search Results > Funding Opp Detail'. The main content area displays the title 'Epidemiology Grants' and the opportunity ID: 9845896d-0fec-415c-88b2-d1d75de8f0f3. A 'Track' button is visible, and the 'Share' button is circled in red. The 'Full Details' section lists the website, funder (Alex's Lemonade Stand Foundation for Childhood Cancer (ALSF)), funder type (Private Foundation or Non-Profit), and country of funder (United States). The amount is listed as 'Upper: \$200,000 usd'. The right sidebar shows 'See more opps like this', 'Send feedback', 'Potential Collaborators' (124 from inside your institution, 500+ from outside institutions), and '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 a web interface for funding search results. At the top, there are navigation tabs: Home, Funding (selected), Profiles, Conferences, and Awarded Grants. On the right, there are search and notification icons, and a 'HELP' button. Below the navigation, there's a breadcrumb trail: 'Funding Discovery' > 'Funding Search Results'. The main content area is titled 'Search Funding Results' and shows 'Your Search: (epidemiology)'. There are links for 'Advanced Search', 'Save Search', 'Refine Search', and 'Share Search'. Below this, there's a summary table on the left and a list of results on the right. The 'Share' button in the action bar is circled in red.

Recently added				Deadline	Amount			
Last 30 days	54	<input type="checkbox"/>	Track	<input type="checkbox"/> Share	Export	Dismiss		
Last 14 days	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Spain: Epidemiology and Public Health at the Universidad de Murcia	15 Sep 2023	€9,600 EUR		
Last 7 days	9			Fulbright Scholar Program	Application	Anticipated		
Submission type				Council for International Exchange of Scholars (CIES)				
Limited Submission	20			Institute of International Education (IIE)				
Other internal coordination r...	1							
Deadline Certainty								
Anticipated	222	<input type="checkbox"/>	<input type="checkbox"/>	Rebecca James Baker award	30 Mar 2023	see record		
Confirmed	141			International Society for Environmental Epidemiology (ISEE)	Nomination	Confirmed		

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**.

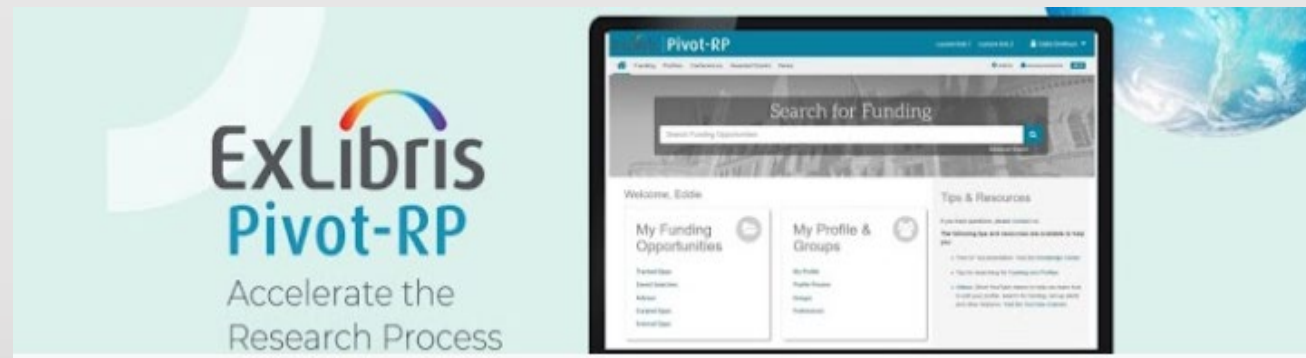
The screenshot shows the Pivot-RP interface. At the top, there is a blue header with the 'exLibris | Pivot-RP' logo on the left and the user name 'Nivithasree Raghupathi Kothandaram' on the right. Below the header is a navigation bar with links for 'Funding', 'Profiles', 'Conferences', and 'Awarded Grants'. On the right side of the navigation bar, there are icons for search, announcements, and a 'HELP' button. A 'Calendar View' button is also visible in the top right corner.

The main content area displays a list of tracked opportunities. The left sidebar shows a list of filters: 'Tracked' (2), 'Saved Searches' (2), 'Shared', 'Received', and 'Advisor'. The main list has a header 'Tracked Opps (2)' and a 'Sort' dropdown. The list contains two items:

	Tracked Opps (2)	Sort	Deadline
<input type="checkbox"/>	<input type="checkbox"/> Michael S. Pessin Stroke Leadership Prize		28 Oct 2022 Application Anticipated
<input type="checkbox"/>	<input type="checkbox"/> Alumni activity grants		04 Oct 2022 Application Anticipated

An 'Options' dropdown menu is open for the first item, 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'.

Pivot- RP Videos



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