
Pivot Start Guide

- **Product:** Pivot

Welcome to the Pivot Start Guide. This guide is broken down into sections to help you get started and navigate Pivot.

Pivot is the most comprehensive resource for global funding sources, coupled with acclaimed scholarly profiles to match financial support to researchers and partners.

Pivot accelerates the research process by integrating funding and collaborator into one powerful tool.

Creating Your Account

If you don't have a Pivot account, go to <http://pivot.proquest.com> to **sign up** link in the upper right of the screen. Fill out your Name, Email, Password, and Affiliated Institution.

Note

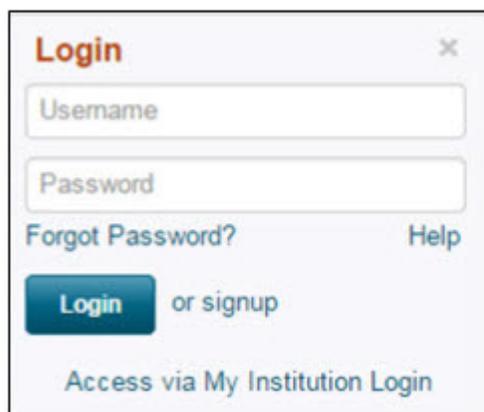
The email you register with must be the email at your affiliated institution (downstate.edu). Pivot will not allow you to create an account if you enter a non-institutional email address.

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!

Login

There are **two ways** to access Pivot:

1. Use an on-campus computer and go directly to <http://pivot.cos.com>.
2. Login to Pivot at <http://pivot.cos.com> with your username and password.



The image shows a login window titled "Login" with a close button (X) in the top right corner. It contains two input fields: "Username" and "Password". Below the password field are two links: "Forgot Password?" and "Help". At the bottom, there is a blue "Login" button followed by the text "or signup". Below that is a link: "Access via My Institution Login".

Login help

- **Forgot password** – this link takes you to the form to complete to be sent your password
- **Access via My Institution Login** – **USE THIS as the preferred login method** (see below).
- **Help** – if you need additional assistance logging in to Pivot, let us know how we can assist you and support will be in contact with you within one business day
- **Sign out** – This will end your session and log you out of Pivot

Shibboleth Authentication - Downstate preferred login method

Shibboleth is the world's most widely deployed federated identity solutions. It provides Single Sign-On capabilities which helps connect users to systems both within and between organizations.

The biggest benefit you is, it is one less password to remember. No more trying to remember a specific Pivot username and password. With Shibboleth in Pivot users are now able to use the same credentials they use throughout their institution.

1. Login as normal.
2. Select the Change account info from the drop down list on the top right dropdown of your screen.
3. Associate your account: Choose your Institution and select Associate Account.
4. You will receive a confirmation.

Navigation

Here are some quick tips to finding your way around Pivot.

- At the top of every Pivot page are your main logo and navigation links to the main areas of Pivot, as well as a link to Help.
- At the bottom of every page are links to general site information such as: Support/Help, About Pivot, Privacy, Terms of Use and Contact Us.
- Individual Pivot pages provide links to other relevant product features and functionality

Claim & Update Your Profile

Claiming and keeping your profile updated enables better funding opportunity matching. It also increases visibility for you and your institutions, so you are more easily discovered by other users and potential collaborators, follow these **steps to update your profile** and get more robust funding matches recommendations from the Pivot Advisor.

1. Log in to your a Pivot account.
2. *Click* on your name to display the options and click on **your profile** link.
3. On your Pivot profile *click* the **Update your profile**.
4. *Clicking* the **Continue** button will take you out of Pivot and into our profile editing system.
5. **Click the Edit** button(s) to modify the information in a specific section of your profile.
6. You must *click* the **Save** or **Add** button for each field after making changes, adding new information such as your **ORCID account**, or removing information.

7. Once you selected **done** your submissions will be immediately viewable in Pivot.

Check to see if you've claimed your profiles

1. **Login** to [Pivot](#) with your user name and password.
2. **Click** the Claim Profile link (upper right-hand corner, Click on the arrow to display the options).
3. When you located your profile from the results list, *click* the “**This is me**” button.
4. A couple verifications and you will be granted access to update your profile.

Other options in your Profile you can update:

- **Change Account information:** This takes you to a page where you can change your account username or password and select a different affiliation if your account is affiliated with more than one institution that subscribes to Pivot.
- **Preferences:** Allows you to disable search filters that have been set by your administrator for the university as well as set deadline notification preferences for funding opportunities that are added to either your tracked or active lists.
 - Set a default deadline reminder timeline and notification preference for all funding opportunities as they are added to your Active or Tracked lists.
 - Select your preferred notification method – email, notification from the Pivot announcements link, or both. Then select how far in advance of each deadline on the funding opportunities you wish to receive a reminder using the options provided.
 - Set different deadline notifications for Active and Tracked, or only set reminders for one of the two.
 - You can alter the deadline reminder for any funding opportunity on either list by selecting the **Edit deadline** reminder on the Options menu for any funding opportunities on either list.
- **Change Affiliation:** This option is only displayed if your account is affiliated with more than one institution that subscribes to Pivot.
- **Groups:** Takes you to your groups page where you can create pre-defined groups for sharing funding opportunities. To create a new group:
 - *Click* your name in the upper right-hand corner.
 - *Click* New Group and name your your group.
 - Enter the people for your group – if you are adding colleagues from your Institution, simply type the name and if they have a Pivot profile, their email address will display.
- To enter people who are not in your institution, type the email address and *click* the “tab” key after entering the email address.
- When you have finished entering names and/or email addresses, *click* Submit.

ORCID Account Integration

With your ORCID account added to your Pivot profile further enhances funding recommendations for you. Linking your ORCID account is easy:

1. Create or add your ORCID Account using the ‘Edit’ profile button.
2. Authorize ProQuest to link your ORCID Profile to your Pivot Profile.
 - [Pivot and ORCID citations are now synded announcement.](#)
 - [News Release - ProQuest enables automated updates from ORCID.](#)

Papers Invited

The Papers Invited® database, a comprehensive collection of calls for papers issued by professional bodies, journal editors and other conference organizers in all academic disciplines from all over the world. With “Papers Invited” included in Pivot, scholars can identify sponsored research funding, locate potential collaborators, and note upcoming conferences and special journal issues where they can present and publish their research.

How to Search

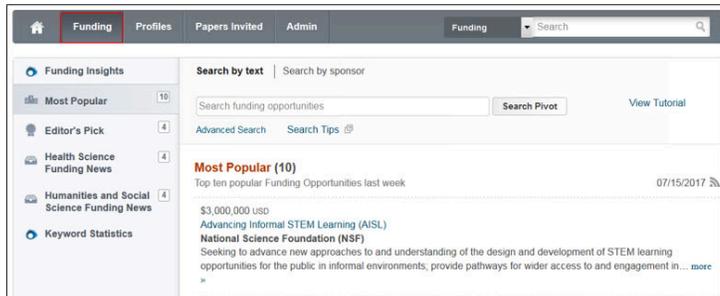
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How to Search

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

Quick Search

- Use the Quick Search feature to search all fields of the **funding opportunities** in the database. To produce maximum results, all search terms entered are connected by the Boolean connector OR. The results of a Quick Search are always ranked by relevancy.
1. *Click* on Funding
 2. Enter your search terms into the text box.
 3. *Click Search Pivot.*



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.

Tip: 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.

Sponsor Search

The Pivot Sponsor Search is a predefined search that allows you to search for a specific sponsor and view funding opportunities or search for a sponsor name.

1. On the main **Funding page**, *click* the **By Sponsor** link located above the **Quick Search** box.
2. Enter a sponsor name in the text box to conduct a search that will display all opportunities offered by that sponsor or *click* on a link below the search box to view the names of **All sponsors**, **U.S. Federal sponsors**, or **Non-U.S. Federal sponsors**. If you choose All sponsors, please be patient as the list will take some time to display. If the names are hyperlinked, clicking on the sponsor name will display the funding opportunities offered.

Note

Many Sponsor names are listed under the name of their larger controlling entity.

Example: The National Institutes of Health (NIH) is listed as one of the departments in the United States Department of Health and Human Services, under "U." The Sponsors included in this list may change over time as opportunities are added and removed from the database.

Refine Search

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.

The screenshot shows the 'Search Funding Results' page for the search term 'genetics'. At the top, there are navigation tabs for 'Funding' and 'Profiles', and a search bar containing 'genetics'. Below the search bar, the text 'Your Search: (Sponsor=(genetics))' is displayed, along with buttons for 'Advanced Search', 'Save Search', and 'Refine Search' (the latter is highlighted with a red box). The main content area is divided into two columns. The left column contains several filter categories: 'Top funding types' (with sub-items like 'Prize or Award', 'Research', etc.), 'Top sponsor types' (with sub-items like 'Professional Society', 'Academic Institution', etc.), 'Top requirements' (with sub-items like 'PhD or MD or Other Pro...', 'Graduate Student', etc.), and 'Top keywords' (with sub-items like 'Genetics', 'Human Population and G...', etc.). The right column displays a list of 18 results, each with a title, sponsor, deadline, and amount. The first result is 'Grants to Support Field-Based Genetic Research and Training (Hereditry Fieldwork Grants)' from the Genetics Society, with a deadline of 01 Mar 2013. Other results include the 'DeLill Nasser Award for Professional Development in Genetics' and the 'Smith-White Travel Award'.

2. **Add or remove** criteria to narrow down or broaden your original search.
3. **Click** Search.

The screenshot shows the 'Funding Advanced Search' page. At the top, there are navigation tabs for 'Funding', 'Profiles', 'Papers Invited', and 'Admin', and a search bar. Below the search bar, the text 'Your query contains institutional filters. Uncheck them if you wish to remove the filters from your query.' is displayed. The 'Activity Location Filter' section has a checkbox for 'Brazil OR Latin America OR Unrestricted' which is checked. The 'Find Opportunities matching' section has two radio buttons: 'Match all of the fields' (selected) and 'Match any of the fields'. Below this, there are three rows of search fields, each with a dropdown menu for 'All Fields' and a text input field. The first row has the text 'genetics' in the input field. There are 'Search' and 'Clear All' buttons. At the bottom, there are expandable sections for 'Amount' and 'Deadlines'.

Faceted Search

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.

Submission type	80 Results	Sort -	Deadline	Amount
Limited Submission: 2	<input type="checkbox"/>	CBCF, BC/Yukon Region Annual Breast Cancer Research Postgraduate Fellowship	12 Nov 2013	\$170,000
Top funding types	<input type="checkbox"/>	Project Grants	10 Jan 2013	see record
Research: 50	<input type="checkbox"/>	Clinical Translational Research Award	03 May 2013	\$12,000,000
Program or Curriculum ...: 15	<input type="checkbox"/>	Grants	unspecified	see record
Training or Scholarshi...: 14	<input type="checkbox"/>	Avon Foundation Breast Cancer Research Program	02 Apr 2013	\$300,000
Postdoctoral Award: 11	<input type="checkbox"/>	Postdoctoral Fellowships	unspecified	\$180,000
Collaboration or Coope...: 4	<input type="checkbox"/>	Research Grant Programme	unspecified	\$250,000
Top sponsor types	<input type="checkbox"/>	Career Development Awards	21 Feb 2013	\$332,372
Other Nonprofit: 23	<input type="checkbox"/>	Era of Hope Scholar Award	05 Apr 2013	\$2,500,000
Private Foundation: 23				
Professional Society o...: 8				
Federal, U.S.: 7				
Academic Institution: 8				
Top requirements				
PhD or MD or Other Pro...: 61				
New Faculty or New Inv...: 38				
Nonprofit: 28				
Academic Institution: 21				
Government: 11				
Top keywords				
Breast Cancer: 72				
Cancer or Carcinogenesis: 29				
Cancer Prevention: 25				
Oncology: 25				
Community Health: 14				

Additional Resources:

- Search Tips
- Navigating Your Funding Search Results

Saving a Search

Save your Query

1. From the search results page, *click* on **Save your Query** at the top of the page.

Note

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 or not 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 opp on. You are allowed to save an unlimited number of opportunities.

There are **two ways** to save funding opportunities:

1. Select from your **search funding results list**, will display options for tracking
2. Select from within the **individual opportunity**.

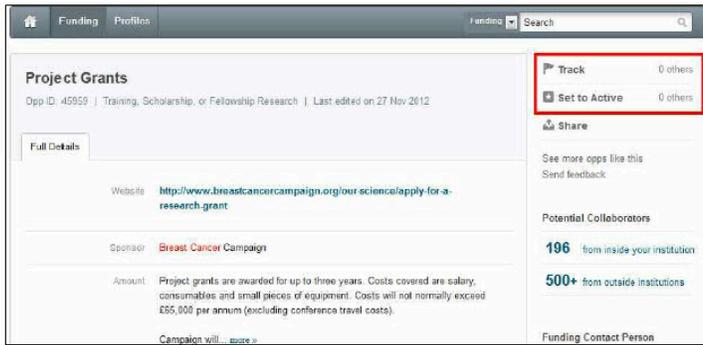
From The Funding Results List

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.
5. **Click Add**.

Submission type		Track	Set to Active	Share	Export	Deadline	Amount
Limited Submission:	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			12 Nov 2013	\$170,000
Top funding types							
Research	58						
Program or Curriculum	16						
Training or Scholarship	14						
Postdoctoral Award	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			18 Jan 2013	see record
Collaboration or Cooperative	4						
Top sponsor types							
Other Nonprofit	28	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			03 May 2013	\$12,000,000
Private Foundation	23						
Professional Society or	8						
Federal, U.S.	7						
Academic Institution	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			unspecified	see record
Top requirements							
PhD or MD or Other Pro	61	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			02 Apr 2013	\$300,000
New Faculty or New Inv	36						
Nonprofit	28						
Academic Institution	21	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			unspecified	\$180,000
Government	11						

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 opp 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, you will receive 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:

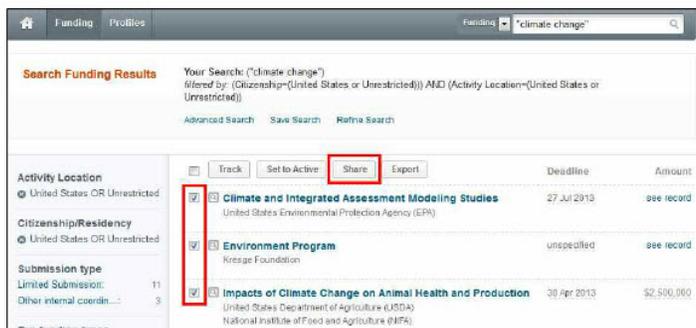
1. **From the Opportunity**
 - Run a Funding search.
 - Select the opportunity you wish to share.

- *Click* Share.
- Enter the name or email address of the person you wish to share the opportunity with, include a message, and *click* Send.



2. From a Funding Results Page

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



3. From Your Active or Tracked Lists

- Select the opportunity you wish to share.
- *Click* Options, and then **click Share**.
- Enter the name or email address of the person you wish to share the opp 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.

Resources

- [Product login](#)
- [LibGuides](#)
- [Datasheet/Customizable Posters](#)
- Visit [Pivot's You Tube channel](#) and learn how to create an account, set up alerts, search for funding and scholars and much more!
 - [Getting started videos - user](#)
 - [Pivot Homepage](#)
 - [Profiles](#)
 - [Funding](#)
 - [Pivot Promo Video](#)

Webinars:

Complimentary free training webinars are available for Pivot. A complete listing of webinar sessions can be found below. New dates and times are added monthly.

- Webinars for [Researchers, Faculty, Students, Staff](#)

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