
Getting Started with Pivot

Creating an Account (Registering)

If you don't yet have a Pivot account, go to <http://pivot.proquest.com>, select the sign up link in the upper right on the screen, and follow the on-screen instructions. You must select the affiliated member institution from the list on the page, and you must have a valid email address at that institution.

Note

You must register using an email address at your affiliated institution. Pivot does not allow you to create an account if you enter a non-institution email address.

After submitting your information, Pivot sends you an email message with a verification URL. Select the URL to confirm your registration and log in.



If you are an administrator, you can create accounts for other users. See [Adding Users](#).

To view the list of all user accounts that were created in the last 90 days, open the User Accounts Created in the Last 90 Days page ([Admin > Reports > Accounts > New Accounts](#)).

Logging In and Logging Out

To manually log in to Pivot at <http://pivot.proquest.com>:

1. Select **Log in** in the upper right on the screen, enter your user name and password in the login pane, and select **Login**. If you do not have multiple institution affiliations, you are logged in.
2. If you have multiple affiliations, select your affiliation. You are logged in.

Select affiliation for your current Pivot session

You have multiple affiliations. Please select an affiliation below for the current session.
You can change your session affiliation at any time by selecting 'Change Affiliation' at the top of the page.

ProQuest

ProQuest Information Solutions

Select Affiliation

To change your institution affiliation at any time, select **Change Affiliation** in the user menu.

Some institutions enable you to log in using single sign-on (Shibboleth), which does not require you to enter your user name and password as long as you are already logged in to your institution's internal systems. In this case, select **Log in**, select **Access via My Institution Login** in the login pane, select your institution from the drop-down list, and select **Login**.

If you forgot your password, you can recover it yourself on the login pane, or your administrator can manually send you an email with a URL that enables you to change your password.



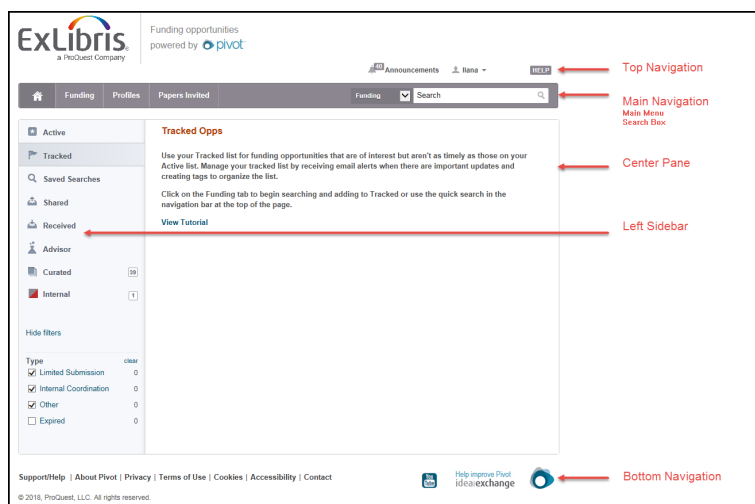
To help a user to reset his or her password by sending them a password reset email, on the User Accounts Report page ([Admin > Reports > Accounts > User Accounts](#)) select **send email** in the user's row. The password reset email is sent to the user, together with the user's account name.

To log out, select **Sign out** in the user menu at the top of the page. If you are inactive for more than an hour, you are automatically logged out of Pivot.

For assistance, contact your administrator.

Pivot's User Interface

When you first log in to Pivot, the first page you see (your home page) is the **Tracked Opps** tab.



Tracked Opps Tab

Pivot's UI contains the following areas:

- **Top Navigation** – View system announcements, access the user menu (your user name), open this user guide (**Help**). The user menu contains the following options:
 - **Your profile** – Manage your profile. See [Updating Your Profile](#).
 - **Change account info** – Manage your user account. See [Managing Your Account](#).
 - **Preferences** – Change your personal funding opportunity search and deadline preferences. See [Changing Funding Opportunity Search and Deadline Preferences](#).
 - **Change affiliation** (when available) – Change your institution. See [Logging In and Logging Out](#).
 - **Groups** – Manage user groups with which to share saved searches or funding opportunities. See [User Groups](#).
 - **Sign out** – See [Logging In and Logging Out](#).
- **Main Navigation** – Access the main menu and the search box.

In this document, an option in the main menu is simply referred to by its name, for example: **Profiles**. The search box has a search option drop-down menu and a search box.

- Center Pane – When you select a menu option or a sidebar tab, the page appears in this pane. Most of your work time will be in this pane.
- Left Sidebar – This sidebar contains tabs and filters that provide quick access to curated lists of [funding opportunities](#). Some tabs appear only when they contain content. The tabs are as follows:
 - **Active** – Funding opportunities that you are actively pursuing or in which you are highly interested. You can add an opportunity to this tab when viewing the opportunity or from any other list of opportunities.
 - **Tracked** – Funding opportunities that you have personally marked as of interest. You can receive regular alerts about these opportunities. Note that an administrator can add an opportunity to this list, in which case the opportunity is noted as having been added by an administrator.
 - **Saved Searches** – Searches that you have personally performed and then saved. You can receive regular alerts with new and updated results from these searches. You can also share these searches with other users. Note that an administrator can add a saved search to this list, in which case the search is noted as having been added by an administrator.
 - **Shared** – Opportunities that you have shared with other users in the last 60 days.
 - **Received** – Opportunities that other users have shared with you.
 - **Advisor** – Opportunities automatically shared with you by Pivot's intelligent Advisor feature. The Advisor analyzes several areas of your profile (keywords, publications, CV information, abstracts, and so forth) and displays funding opportunities based on its analysis. The more details you include in your profile, the better the quality of matches you can expect from the Advisor.
 - **Curated** – Funding opportunities and saved searches that an administrator has shared with all users.
 - **Internal** – Funding opportunities that were added by, and are local to, your institution.

Different filters/facets or sort options appear in the sidebar, depending on tab that is currently selected.

- **Type** filter (Active / Tracked / Shared / Received) – Select the funding opportunity types to display: limited submission, internal coordination, other, and/or Expired.
- **Tags** filter (Saved Searches) – Select one or more tags that you associated with the searches.
- **View** filter (Received) – Select whether to display opportunities that you have already acted upon.
- **View** sort options (Shared) – Sort by opportunity or by profile.
- **Recently added** facet (Advisor) – Select whether to only view funding opportunities added in the last 7 days.
- **Submission type** facet (Advisor) – Select whether to view only funding opportunities marked as Limited Submission and/or Other internal coordination required.
- **Top funding types** (Advisor, Internal) – The intended reason for the funding, such as Artistic Pursuit or Prize or Award.
- **Top sponsor types** (Advisor, Internal) – The organization providing the funding, such as Private Foundation or Federal, U, S.
- **Top applicant types** (Advisor, Internal) – The kind of recipient who is eligible for the funding, such as Nonprofit or Individual: Graduate Student.
- **Top keywords** (Advisor, Internal) – The categories of research or purpose intended to receive the funding, such as Community Services or Education.
- **Curated Lists** (Curated) – Select to view view a curated list, which is a list of opportunities that an administrator thinks may be of interest.
- **Internal Funding** (Internal) – Select to view only opportunities funded locally at your institution.
- Bottom Navigation – View additional information about Pivot, contact Ex Libris, and submit an idea (**Idea Exchange**).

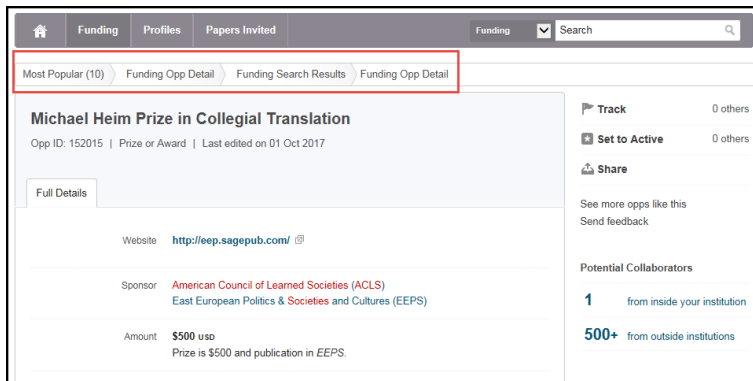


As an administrator, when you are viewing the **Curated** tab, you also see options to view only your curated lists / curated saved searches.

You also have access to the Admin dashboard for configuring Pivot; see [Configuring Pivot](#).

Breadcrumbs

After navigating to specific pages in Pivot, use the breadcrumbs to return to a previous page.



Breadcrumbs

Managing Your Account

To change your account information:

Select **Change account info** in the user menu. The Change Account Information page appears.

change_account_information.png

Change Account Information

You can change your user ID, institution, and password. The opportunity to change your institution only appears if your account is affiliated with more than one institution that subscribes to Pivot.

To delete your account:

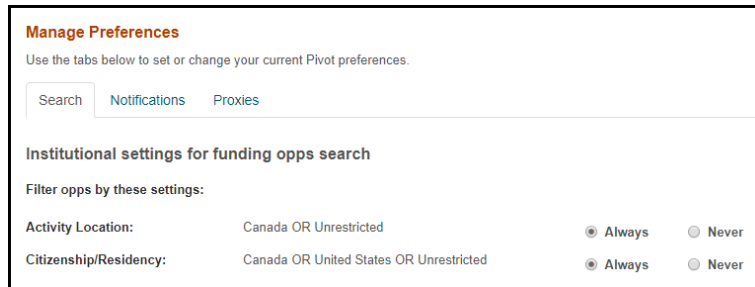
You must consent for Pivot to collect and use your personal information according to Pivot's privacy policy and terms of use in order to maintain an account with Pivot. Select the link to see [information about managing personal data in Pivot](#).

To delete your account, clear your confirmation of this consent on the Change Account Information page. The consent dialog box appears. Select **No, I do not consent** to delete your account. This action is not reversible.

Changing Funding Opportunity Search and Deadline Preferences

To change funding opportunity search and deadline preferences:

Select **Preferences** in the user menu. A preferences page appears.

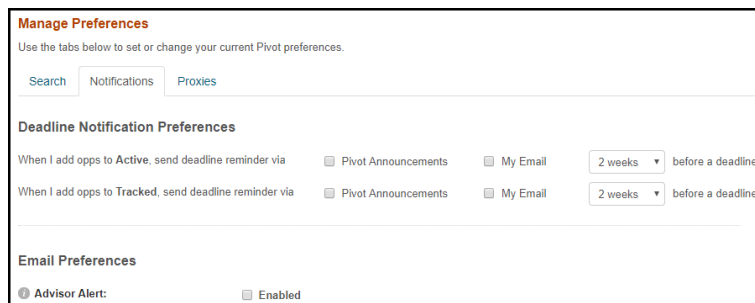


The screenshot shows the 'Manage Preferences' page with the 'Search' tab selected. It includes a header with 'Search', 'Notifications', and 'Proxies' tabs. Below is the 'Institutional settings for funding opps search' section, which contains two rows of settings: 'Activity Location' and 'Citizenship/Residency'. Each row has a dropdown menu with 'Canada OR Unrestricted' and two radio buttons for 'Always' (selected) and 'Never'.

Preferences - Search Tab

On the **Search** tab you can change whether your funding opportunity searches use the institution's defined search filters by default (you can always clear these filters when performing an advanced search).

On the **Notifications** tab, you can configure whether deadline reminders are sent as announcements or by email, and when, as well as whether to enable alerts from the Advisor.



The screenshot shows the 'Manage Preferences' page with the 'Notifications' tab selected. It includes a header with 'Search', 'Notifications', and 'Proxies' tabs. Below is the 'Deadline Notification Preferences' section, which contains two rows of settings: 'When I add opps to Active, send deadline reminder via' and 'When I add opps to Tracked, send deadline reminder via'. Each row has two checkboxes for 'Pivot Announcements' and 'My Email', and a dropdown menu set to '2 weeks' before a deadline. Below this is the 'Email Preferences' section, which has a checkbox for 'Advisor Alert' that is currently checked and labeled 'Enabled'.

Preferences - Notifications Tab

See the next section regarding managing profile proxies.

Managing Profile Proxies

You can add and remove proxies that can edit your profile. To manage your profile proxies, select **Preferences** in the user menu and select the **Proxies** tab.

Manage Preferences

Use the tabs below to set or change your current Pivot preferences.

Search Notifications Proxies

Profile Proxies

You can assign one or more Pivot users access rights to manage your Pivot profile on your behalf. "Proxies" will have the same privileges as you do to edit the content of your profile. You may revoke a user's proxy privileges at any time. Click "Add a Proxy" to begin and search for the last name of the person you would like to make a proxy. If the person you would like to make a proxy is not yet a registered Pivot user, please instruct them to sign up for an account.

[Add a Proxy](#)

Preferences - Proxies Tab

To add a proxy, select **Add a Proxy**, enter all or part of the **Last Name** and select their **Affiliation**, and select **Search**. Select **add** in the line of the user that you want to add as proxy.

To delete a proxy, select **remove** in the line of the user and select **Yes** in the confirmation dialog box.

Claiming or Creating Your Profile

Researchers have a profile, which is a user identity associated with publications and funding opportunities. When viewing a profile, Pivot displays important information about the researcher, as well funding opportunities that the Advisor determines may be relevant to the researcher and the researcher's department. for more information about profiles, see [Pivot Profiles](#).

It is expected that Pivot users will also have profiles. The benefits to having a profile are:

- Managing information – Ensuring that the information associated with your research publications and funding opportunities is accurate and up-to-date.
- Advisor recommendations – These are based on your profile keywords.



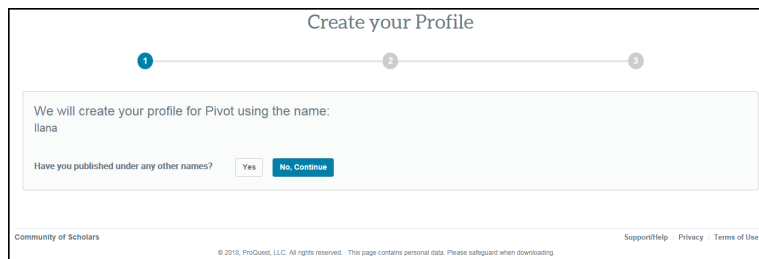
If you are an administrator, you can claim or create a profile for another user. See [Claiming Profiles](#).

To claim a profile:

1. Select **Claim profile** in the user menu. Pivot displays a list of potentially matching profiles based on your account information, if it can find any.
2. If you see the correct profile, select **This is me** in the profile row.
 - If the email on the profile you are claiming matches the email on your Pivot account, Pivot sends a confirmation with a verification URL to your email. Open the verification URL to claim the profile.
 - Otherwise, Pivot asks you to confirm that you still have access to one of the email addresses in the profile before sending the message.
 - If you do not have access to one of the emails in the profile, select this. Pivot displays a form to request access to the selected profile. The information you submit is reviewed by Ex Libris. Once validated, Ex Libris updates the profile and sends you the message with the verification URL.

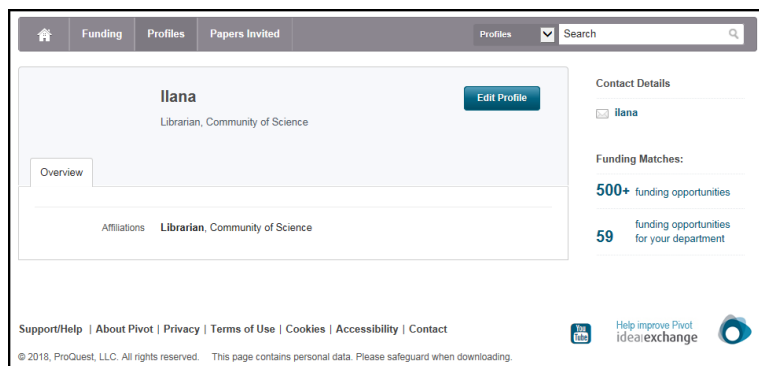
To create a profile:

1. Select **Claim profile** in the user menu. Pivot displays a list of potentially matching profiles based on your account information, if it can find any.
2. Select **Create Your Profile** and select **Continue** in the confirmation dialog box. The Create Your Profile page appears.



Create Your Profile

3. Follow the on-screen steps to create your profile. When you are done, select **Return to Pivot**. The current tab/window closes and Pivot refreshes, displaying your new profile.



New Profile

To update your profile, see [Updating Your Profile](#). In particular, you may want to add:

- Keywords. Pivot's Advisor can only suggest funding opportunities if you have at least one keyword defined.
- Your publications, grants, and patents.
- A profile photo.
- Integrate your account with ORCID[®] (Open Researcher and Contributor ID).
- Proxies to manage your profile.

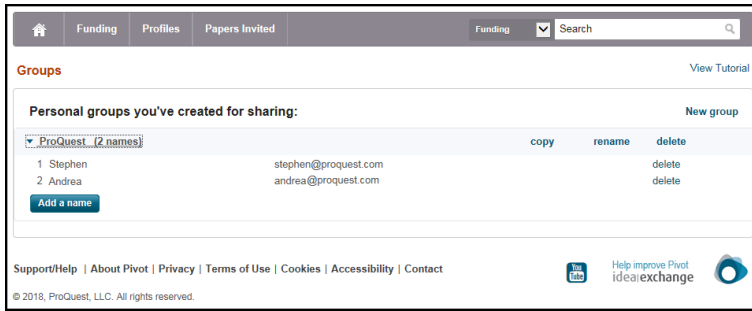
User Groups

User groups can be used in Pivot to share information between users with similar areas of interest, such as funding opportunities, newsletters, and other communications. There are two types of user groups:

- Personal Groups – user groups that any user can create and add users to. Only the creator can add users and information to personal groups.
- Public Groups – user groups created by a Pivot administrator that are visible to all users who can choose to join the group.

Personal Groups

You can set up groups of users with which to share information. You manage groups on the Groups page (select **Groups** in the user menu).



Groups

To add a group:

1. On the Groups page, select **New Group**. The Add a New Group dialog box appears.

Add a New Group

2. Enter a group name and select users to add to the group. This field uses auto-complete to suggest Pivot users with profiles in your institution (not user accounts). In addition to Pivot users, you can add any email address you want to a group. When sharing opportunities with a non-registered user, the user receives brief information about the opportunity but cannot see the full opportunity until they have a user account.

You can also copy all of the members from an existing group to create a new group. To do this, select **Groups you can copy from** and select an existing group.

3. When you are done, select **Submit**. The group is created.

You can add or delete names to/from a group, and you can copy, rename, or delete a group.

You can add users to a group (new or existing) from the search results page after searching for profiles: select the users and select **Add to Group**.



All administrators have at least one pre-defined user group called **All Research Administrators**. This group contains all users whose profile role is **Research Administrator**.

Public Groups

Public groups are created by Pivot administrators and are visible to all users. There are three possible roles for groups members:

- Owners – the Pivot administrator that created the group is the owner. Owners can add and delete members and can assign group administrators.

- Group Administrators – the owner of the group can assign any member of the group to be the group administrator. The group administrator can add and delete members and share content with the group.
- Members – Users who join a group are members. Users can choose to join or leave a group or can be added to a group by the group owner or administrator. Members receive group information, but cannot contribute information to the group or see the other members of the group

To join a public group, open the Groups page (select **Groups** in the user menu or Manage Groups from the Admin Dashboard) and select **join group** for the group you want to join.

To leave a public group, select **leave group** for the group you want to leave.

Manage Groups

Personal groups you've created for sharing + New group

Public groups

Center for Environmental Studies (3 members) leave group

This group encourages faculty from across disciplines to collaborate on projects related to the environment and the health of our planet.

★ Owner:

Interdisciplinary Gravitational Research group (14 members) join group

This group studies the impacts of gravity on human survival. Visit the center [webpage](#) for more details

★ Owner:

Pivot Demo Group (3 members) join group

This is a public group that anyone in this institution can join. This group is just a test group to demonstrate the capabilities of a public group.

★ Owner:

Public Groups

Note

- Owners do not have to be members of the group they create and are not automatically added as members.
- Public groups are visible to everyone at your institution. Anyone can join a group and become a member.
- Members can leave a group at any time.
- Members cannot see the other members of the group (unless administrators reveal names of recipients in a group when sharing opportunities).



Creating Public Groups

Note

Only Pivot administrators with the **Manage Public Groups** privilege can create new public groups.

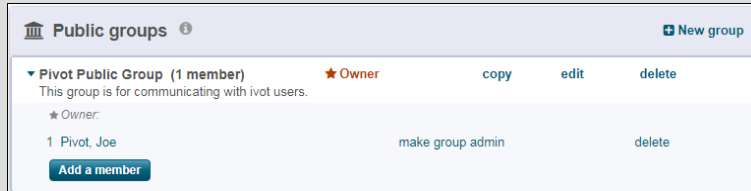
Pivot administrators can create public groups from the Groups page (select **Groups** in the user menu or Manage Groups from the Admin Dashboard) in the same way personal groups are created. For more information, see [Personal Groups](#).

Additionally, Pivot administrators can convert a personal group into a public group by selecting **make public** next to a personal group on the Groups page.

Managing Public Group Members

Owners can assign public group members administrator privileges. This allows them to add and delete members and view all of the members of the group.

To manage public group members, open the Groups page (select **Groups** in the user menu or Manage Groups from the Admin Dashboard). The following appears, for example, under Public groups:



Managing Public Group Members

To assign administrator privileges to a public group member, select **make group admin** next to the name of the member.

To remove administrator privileges from a public group member, select **remove group admin** next to the name of the member.

To delete a public group member, select **delete** next to the name of the member.