

# Pivot Guide

## Accessing Pivot – 2 ways

### With your UTC ID...

1. Navigate to [this website](https://proxy.lib.utc.edu/login?url=https://pivot.proquest.com/funding_main) ( [https://proxy.lib.utc.edu/login?url=https://pivot.proquest.com/funding\\_main](https://proxy.lib.utc.edu/login?url=https://pivot.proquest.com/funding_main) )
2. Enter your UTCID (NET ID) and Password.
3. You should be on the Pivot homepage. You can now search for funding opportunities and invited papers using the steps below. **(Note: If you want to save opportunities or track them for later, you must set up an account!)**

### With a Pivot Account...

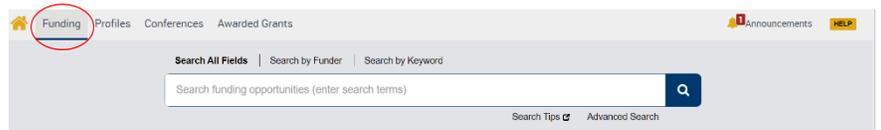
1. Go to <http://pivot.proquest.com>
2. Enter your UTC email address and the password you created during your Pivot account setup (see page 2).
3. You should be on the Pivot homepage. You can now search for funding opportunities and invited papers using the steps below.

## Getting Started with a Search – Quick

The Pivot **Quick Search** option is the easiest way to conduct a broad search of funding opportunities. To get started with Quick Search, click on the following:

1. The Quick Search bar displayed prominently on the dashboard will search for matching text in a funding opportunity, by default.
2. By clicking on the Funding Tab, you get access to more search options. Another search bar will appear at the top of the funding screen. There are three search options to choose from:

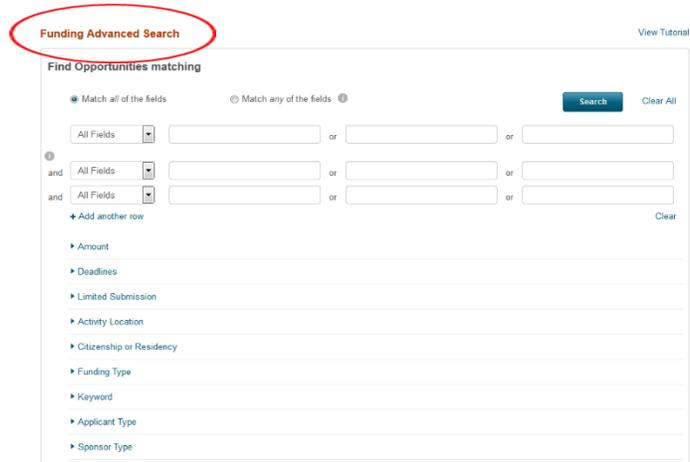
**(1) Search All Fields:** This search allows you to easily search across all fields in a funding opportunity providing you with broad search results. **(2) Search by Funder:** This search allows you to search our entire list of funders using the blank space provided or to browse the funder list alphabetically by: All Funders, U.S. Government Funders, or Non-U.S. Government Funders. Please note that if the funder name is hyperlinked, the funder currently has open opportunities. **(3) Search by Keyword:** This search allows you to search for funding opportunities that specifically contain the keyword, providing you with the most specific search.



## Getting Started with a Search – Advanced

The **Advanced Search** allows you to construct a targeted, field-specific search using search boxes, browsing windows, and pick lists. To conduct an Advanced Search, click on the following:

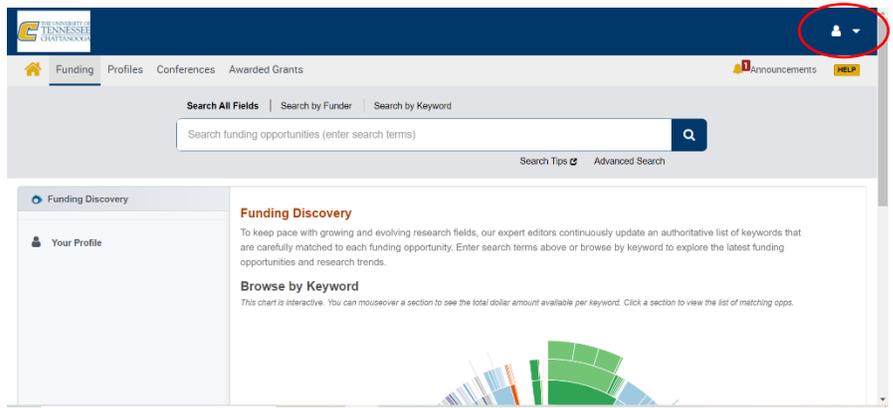
1. Log onto Pivot and select the Funding Tab. From there, click “Advanced Search,” just below and to the right of the quick search.
2. Choose a matching option. These options allow you to either narrow or broaden your search criteria depending on your selection. Two options are available: **(1) Match All of the Fields:** This will retrieve records including ALL of your selected search criteria. This is the default option and is used unless another option is selected. **(2) Match Any of the Fields:** This will retrieve records including ANY of your selected criteria.
3. Make a selection from the drop-down (**All fields, Abstract, Title, Sponsor, Sponsor ID, or CFDA Number**). Complete as many boxes and rows as needed. You can include additional rows by clicking on the **add another row** link.
4. In the Search Fields area, enter the information in the fields relevant to your search. You can display additional search areas: **Amount, Deadlines, Limited Submission, Activity Location, Citizenship or Residency, Funding Type, Keyword, Applicant Type, or Sponsor Type**.
5. At the bottom of the page, you can exclude fields from your search. You can exclude any combination of terms as well as exclude information in the areas mentioned above.



## Account & Profile Set Up

### Setting Up Your Account:

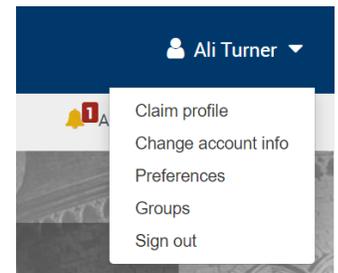
1. Go to [https://pivot.proquest.com/funding\\_main](https://pivot.proquest.com/funding_main) and click the “profile” icon in the top right corner.
2. Using the drop down, click “Create an account.”
3. Select “Use Institutional Login Credentials.”
4. Select “...sign up using your institution email.”
5. Complete the required fields, using your “utc.edu” email address and UTC as the affiliated member institution, and click the “create my account” button.
6. You will receive a verification email at the address entered in the account creation process that will include a link to Pivot.
7. Your email address and the password you entered during account creation will be your Pivot username and password.



### Account Management

Once you are logged in to Pivot, the website provides some links to manage your profile, account information, and any groups you created for sharing funding opportunities. Click on your name, and select one of the following:

- **Your Profile or Claim Profile:** If you already have a profile linked to your account, you will see “your profile.” Clicking on this takes you to your profile where you can take action to update your information. If you do not have a profile linked to your account, clicking on “claim profile” will take you to a list of possible matching profiles, one of which may be yours. If no profile currently exists, you can follow the steps to create a profile for yourself.
- **Change account info:** 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:** Here you can disable search filters that may 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.
- **Change Affiliation:** This option is only displayed if your account is affiliated with more than one institution that subscribes to Pivot.
- **Groups:** This is where you can create pre-defined groups for sharing funding opportunities.
- **Sign out:** This will end your session and log you out of Pivot.



### Deadline Notification Preferences

Under Preferences on the Notifications tab, this feature allows you to 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. You can set different deadline notifications for Active and Tracked, or only set reminders for one of the two. In addition, 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 opportunity on either list.

#### Deadline Notification Preferences

When I add opps to Active, send deadline reminder via  Pivot Announcements  My Email  before a deadline

When I add opps to Tracked, send deadline reminder via  Pivot Announcements  My Email  before a deadline

### Steps for Creating a Profile

1. Once your account is set up, you can create a profile. Click on your name in the top right corner and select the first option in the drop down menu, “claim profile.” Once on the page, select the “create your profile” option. The profile set up will pop up in a new window.
2. Once the basic profile setup is complete, you can view your profile and edit or customize it by adding a photo, links, or info about your research interests.

