Welcome to Pivot.

This document was created to provide you with some suggestions on how you can customize your Pivot subscription and build usage at your Institution.

Below is a handy list of options, suggestions and ideas for you to consider and implement as you see fit. Detailed explanations of each item are available in this document:

- Create a link to Pivot from your website
- Add a Pivot search widget to your website
- Add the Pivot Quick Start Guide to your website
- Link to Pivot YouTube videos on your website
- Link to our free training webinars
- Add Curated Lists to your website
- Create subject specific saved searches and link to them from your website
- Partner with your library and others on campus.
- Create Default Search settings for your institution
- Set a Global Message to appear on all Opportunities at your Institution
- Create Groups for sharing opportunities
- Take advantage of the Pivot Toolkit
- Promote Pivot to your Users
- Schedule training sessions with our Customer Training and Education team

Everything in this document is optional – your users can be up and running with Pivot without any customization, however, to help your users get the most out of Pivot, we hope you will consider implementing some of the suggestions in this document.

As the Administrator of your Pivot subscription, you have access to a variety of tools to assist you in understanding the features and options available to you in the Administrator area -- where you can manage and customize your Institution's Pivot subscription. From within the area you can also monitor overall usage statistics for your Institution. Some of the tools available are:

- **Pivot Usage Reports** – Usage reports are available within the admin tab. There are many types of reports in the admin tab including information about your institution’s overall usage, Funding Alerts, Funding Opps, Accounts and Profile activities. Monthly summaries are also available by email.  
  Navigate to Reports, Request Additional Usage Reports to request a monthly email summary and monthly list of users by name

- **Institutional Settings** - This section will allow you to set search settings for your institution as well as add a global message to all of your funding opps.

- **Groups** – Create groups that you can use when sharing opportunities and searches with others.

- **Education & Training** – Access some helpful information including report and statistics overview, information for Research Administrators and ideas about promoting Pivot at your Institution.

- **Widgets** – Create a funding search widget to place on your website.

You can access the Administrator area and all the resources above, by going to the Pivot login screen (http://pivot.cos.com) and logging in to your Pivot account. Admin privileges can currently
only be granted by the Client Services team so please contact us if you have additional administrators that need access.

There are many things you can add to your website that will help users access and learn Pivot, including:

**Create A Link To Pivot From Your Website**

Your first course of action might be to create a link from your Institution’s website to Pivot.

Users, who click on the link to Pivot from within an institution’s IP range, will have access to basic funding or profile searching in Pivot. However, users will almost always want to log in to take full advantage of Pivot’s tracking and monitoring features and any user outside of the IP range will always need to log in with their Pivot username and Password to gain access.

It’s easy to link to Pivot from your website:

Simply create a direct link to [http://pivot.cos.com](http://pivot.cos.com). Many institutions include a brief blurb about Pivot to explain to users what the resource is and some other pertinent links. See this example:

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**Add the Pivot Funding Search Widget To Your Website**

The Pivot search widget is easy to create and can be placed anywhere on your website. The Pivot search widget allows your users to run a quick Pivot funding search directly from your website. From the admin section of Pivot select **Widgets** and then **Pivot Funding Search Widget**. You will be able to choose a few customization options and preview how your widget will look. Clicking **Create Widget** will generate the code that you can copy and paste in the html code of the webpage where you would like the widget to appear.
Here’s an example of a university that has put a search widget on their website:

**Add the Pivot Quick Start Guide To Your Website**

The Pivot Quick Start Guide provides your users with a brief introduction to Pivot Funding – getting them up and searching for opportunities easily and quickly. Place it prominently on your website so users can download and print it on demand.

**Link To Pivot YouTube Videos On Your Website**

The ProQuest Pivot YouTube channel is a great resource for you and your Pivot users. We have created short videos that cover many different aspects of Pivot such as creating an account, updating a profile, conducting funding searches, conducting profile searches among many other topics. You can link to our YouTube videos or even imbed them directly in your website.

Here’s an example of a university that has linked to many of the Pivot YouTube videos:
And here is a university that has embedded our YouTube videos directly in their website:
**Link To Our Free Training Webinars**

Take advantage of our free training conducted by ProQuest’s professional education and training team. ProQuest offers frequent webinars for Researchers, Faculty and Staff on the basics of using Pivot. Link to and promote our webinar schedule (https://refworks.webex.com/refworks/onstage/g.php?p=4&t=m) and point out the recorded sessions also available on-demand.

**Add Curated Lists To Your Website**

Take advantage of the administrator-only option to create curated lists within Pivot. They not only are available to all your users, but each curated list has its own unique URL so you can link to it from your website. Users who are within your IP-range and click on the link on your website will be able to view the curated opps and log in to their Pivot account if they wish to track them. It’s a great way to highlight opportunities you feel are important for your researchers and faculty and get them to engage with Pivot all at the same time.

**Create Subject-Specific Searches For Your Website**

Take a saved search strategy that you create for a specific department or school and post it on your website. Any Pivot user from your organization can click on the URL and receive the most up-to-date search results. From there, they can simply log into their Pivot account to track any of...
the opps of interest. All you have to do to get the unique search URL is "share" it with yourself. Create and post as many searches as you want.

**Create Default Search Settings For Your Institution**

Using the default search settings option in Pivot will allow you to set activity location and citizenship defaults for all funding searches run by people at your institution. These defaults will generally eliminate the problem of users finding funding opportunities that they are not eligible for based on their location or their citizenship. Users in Australia would likely select defaults of Australia and Unrestricted for both activity location and citizenship. To set these defaults click on **Institutional Settings** and **Search Settings**. Note, users can clear these defaults if they would like when running their searches.

In addition to updating your website, there are other steps you can take to customize and promote Pivot:

**Partner With Your Library And Others On Campus.**

Make sure your librarians know you subscribe to Pivot and that it is a resource they should promote on their A-Z list of databases (most libraries have a web page that lists all of the resources they have available). They can even list the Pivot URL and link to your webpage to provide additional information. Also enlist the help of any departmental or college Deans, Research Administrators and Research Groups who can spread the word about Pivot to their faculty. If your institution is very large, engage the departmental folks and “certify” them as Pivot experts (train them to know all you know about Pivot). That way they can provide one-on-one assistance to researchers and faculty.

*Set A Global Message To Appear On All Funding Opps At Your Institution*

Setting a global message is an easy way to make sure any pertinent information you would like shared with your users appears on each funding opp in Pivot. You can include a blurb about your internal process, the contact information of someone in your office or anything else that you would like your users to be aware of. Remember this message will appear on each and every opp in Pivot funding. (You can also add notes and deadlines to individual opps apart from the global message)

**Create Groups for Sharing Opportunities**

Pivot allows you to create Groups of people with whom you can share Funding Opportunities or Funding Searches. If you have a group of people you wish to regularly share opps/searches with, creating a group of email addresses in Pivot will save you from having to repeatedly enter those emails into the Share box. To create a group, click on your name (in the upper right-hand corner) or go to the Admin area and select **Groups** and **Your Personal Groups**. After creating groups you will be able to select them whenever you share any type of funding opportunity.

**Take Advantage Of The Pivot Toolkit**

When looking for ways to promote Pivot at your institution one of the first places you should go is the Pivot toolkit available in your admin tab under **Education and Training** and **Promoting Pivot at your Institution.** The Pivot toolkit contains customizable Pivot announcements, Pivot logos, posters and other useful items. Feel free to use any of these to promote Pivot, place them on your website, or even create an e-mail signature that promotes Pivot and links to your website.
Create a Getting Started Package for users (hard copy and/or electronic):

- Distribute our Quick Start Guide
- Include instructions on how to set up an individual account and claim your Pivot profile
- Create a customized Pivot FAQ
- Offer training courses or one-on-one drop-in sessions. Use our training outlines and accompanying powerpoint presentations located in the “Help” area for administrators.
- Get in front of new faculty when the start – give them a brief introduction to Pivot and tell them how they can learn more (by going to your website and seeing all the free training and resources you provide!)
- Be creative in promoting Pivot to your users. Each institution is unique in its culture and promotional and implementation plans will vary by customer.

We hope that the information we’ve shared with you gives you some ideas on how to “Make Pivot Your Own” for your institution and on how to get your users started with Pivot.

Please feel free to contact our Client Services team (ClientSvcs@refworks-cos.com) should you have any questions or need any assistance.