

## West Virginia State University Start Guide - Pivot

### Welcome to Pivot

Pivot-RP is a database that contains funding opportunities from many government and private sources, accessible via registration with a WVSU email address. Users can build profiles, save searches, track opportunities, and set up funding alerts on thousands of opportunities.

**\*NOTE** – To use the following HyperLinks you may need to hold down the control button labeled “Ctrl,” the bottom left key on the keyboard while you click on the link.

### Register for a Pivot Account

If you don't have a Pivot account, go to <https://pivot.proquest.com/register> and click on the “**Use Email Address/Create Password**” option on the right side of the screen. Fill out all fields. **You must use your WVSU email address.** (Pivot will not allow you to create an account if you enter a non-institutional email address). After you sign up, check your email for a confirmation. Click the login link in your confirmation email so you can begin using Pivot right away!

If video instruction would be more useful to you, Pivot has set up video tutorials to explain each part of its functionality. The link to the account and profile set up is here:

<https://www.youtube.com/watch?v=o1arUsdckV0>

### Intro to Pivot

The first thing you'll notice upon entering Pivot is that the home screen has a large “**Search for Funding**” search bar. Instead of using this feature immediately, it is advised to take time to learn how to use Pivot effectively to ensure your searches come up with all possible funding opportunities that pertain to what you are looking for. Taking this time up front will also save time and frustration as you learn how to narrow your search fields using the tools Pivot provides.

### “Tips and Resources”

Underneath the right half of the “**Search for Funding**” bar on the right side of the screen you will notice a grey box titled, “**Tips & Resources.**” It is strongly recommended to click on the video link, located at the beginning of the third and final bullet point in the “**Tips and Resources**” section. This will direct you to Pivot's YouTube channel. Here it will be beneficial to watch the “[Pivot In troduction,](#)” “[Setting Up Your Account and Profile in Pivot-RP,](#)”

“[Updating Your Pivot-RP Profile](#),” and then the “[Pivot-RP Quick Search](#)” videos in that order. These four videos will give you an excellent fundamental understanding of how Pivot works and help you apply basic features early on that will make your search results much more successful. Completing the profile set up and claiming the profile will also help you save time as this will help Pivot automatically find opportunities in your listed fields.

This link will take you to Pivot’s YouTube account:

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

If you are a person who consumes information better through text, Pivot also provides documents explaining features, key terms, and functionality in the “**Knowledge Center**” which is located at the end of the first bullet point inside of the “**Tips and Resources**” section.

It is important to note that Pivot has made and will continue to make interface changes. The information currently contained in the “**Knowledge Center**” is all functionally true but things such as the placement of where to access your specific options may have changed. The YouTube videos have tutorials containing the updated interfaces.

Here is the link to the “**Knowledge Center**”:

[https://knowledge.exlibrisgroup.com/Pivot/Product\\_Documentation](https://knowledge.exlibrisgroup.com/Pivot/Product_Documentation)

Inside of the “**Knowledge Center**” you will be directed to a page called “**Product Documentation**.” Here you should read through and familiarize yourself with the following topics: “[Pivot-RP Overview](#),” “[Getting Started with Pivot-RP](#),” “[Searching for Funding Opportunities](#),” “[Viewing and Managing Funding Opportunities](#),” and the “[Pivot-RP Profiles](#)” sections. These are the top three squares in order from left to right and then the square in the final column of the second row underneath of the “**Searching for Funding Opportunities**” square.

### **Pivot Profile**

After becoming familiar with the tutorials and documents it is time to use your newly gained knowledge to claim and update your profile so you can start getting automatic funding recommendations base on our keywords, content, and preferences.

If you didn’t take the time to watch the videos or read the documents before this step here is the link to the video and then document tutorials:

<https://www.youtube.com/watch?v=r10DZqWIRDE&t=197s>

[https://knowledge.exlibrisgroup.com/Pivot/Product\\_Documentation/Getting\\_Started\\_with\\_Pivot-RP](https://knowledge.exlibrisgroup.com/Pivot/Product_Documentation/Getting_Started_with_Pivot-RP)

These two links should provide you with all the information you need to know to get your profile set up and working so Pivot will automatically assist you in finding funding based on the key terms you've entered.

### **Pivot Search**

Pivot has two distinct search features, "Quick Search" and "Advanced Search." As the names might suggest the "Quick Search" feature is quick and easy way to find a broad spectrum of funding opportunities that contain or are relative to the search terms you've entered. The "Advanced Search" feature is a more specified, and more involved, search that requires more specific terms and entry criteria; it will also provide more specific results based on the fields you've entered search terms into.

This video on how to do basic searching will be a great beginning to your searching skills:

<https://www.youtube.com/watch?v=U9J5rRV6nkQ>

Here is the document from the "Knowledge Center" pertaining to the same information and the "Advanced Search":

[https://knowledge.exlibrisgroup.com/Pivot/Product\\_Documentation/Searching\\_for\\_Funding\\_Opportunities](https://knowledge.exlibrisgroup.com/Pivot/Product_Documentation/Searching_for_Funding_Opportunities)

### **Viewing, Saving, and Managing Searches**

Now that you are familiar with using the search feature to find and identify funding opportunities it is time to learn what the different parts of the fund screen mean and how they can be used them to find out more information about the funder, the funding opportunity itself, and how you can track and share the funding opportunity.

Once again, the document inside of the "Knowledge Center" will be your most specific source. The link to the document titled "Viewing and Managing Funding" is below.

[https://knowledge.exlibrisgroup.com/Pivot/Product\\_Documentation/Viewing\\_and\\_Managing\\_Funding\\_Opportunities](https://knowledge.exlibrisgroup.com/Pivot/Product_Documentation/Viewing_and_Managing_Funding_Opportunities)

Here is the YouTube tutorial that goes into some of the information contained in the "Knowledge Center:"

<https://www.youtube.com/watch?v=g4ufwx9AT-8>

### **Success!**

Utilizing the provided materials will ensure that you are taking full advantage if all that Pivot has to offer. Upon finding a grant that you think falls into the scope of the work you are pursuing, please contact the Office of Sponsored Programs immediately so we can help you take the

correct steps to get an application reviewed and submitted in a timely manner. We are incredibly excited to begin working with each and every one of you as you delve into Pivot and the amazing world of grants!

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