

## Pivot-RP funding search

Great help site:

[https://knowledge.exlibrisgroup.com/Pivot/Training/B\\_Working\\_with\\_Pivot\\_Funding\\_Opportunities](https://knowledge.exlibrisgroup.com/Pivot/Training/B_Working_with_Pivot_Funding_Opportunities)

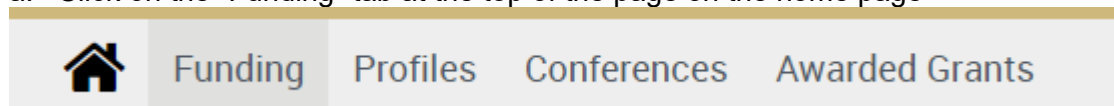
[https://knowledge.exlibrisgroup.com/Pivot/Product\\_Documentation/Searching\\_for\\_Funding\\_Opportunities](https://knowledge.exlibrisgroup.com/Pivot/Product_Documentation/Searching_for_Funding_Opportunities)

- 1) The most basic way to search is to do a keyword search in the search box on the main page



- Each word is looked for independently. So a search for baseball football returns items that match both words anywhere in the item. This is the same as searching for baseball AND football.
- Do not use the articles **a**, **an**, or **the**.
- Searches are case insensitive.
- With the exception of the hyphen, do not use punctuation marks (slashes, commas, and so forth). Punctuation marks may return erroneous results. This also applies to monetary amounts: leave out any commas or periods: use 10000 instead of \$10,000.
- Use double quotes to search for an exact phrase. "baseball football" returns only items with those two words in sequence.
- baseball OR football returns items with either or both words.
- baseball NOT football returns items containing **baseball** but not containing **football**.
- bas\* returns items with words that start with **bas**, such as **baseball** and **basket**.
- (gene w/2 mouse) OR "mouse genome" returns items that have the word **gene** within two words of the word **mouse** or that contain the exact phrase **mouse genome**.

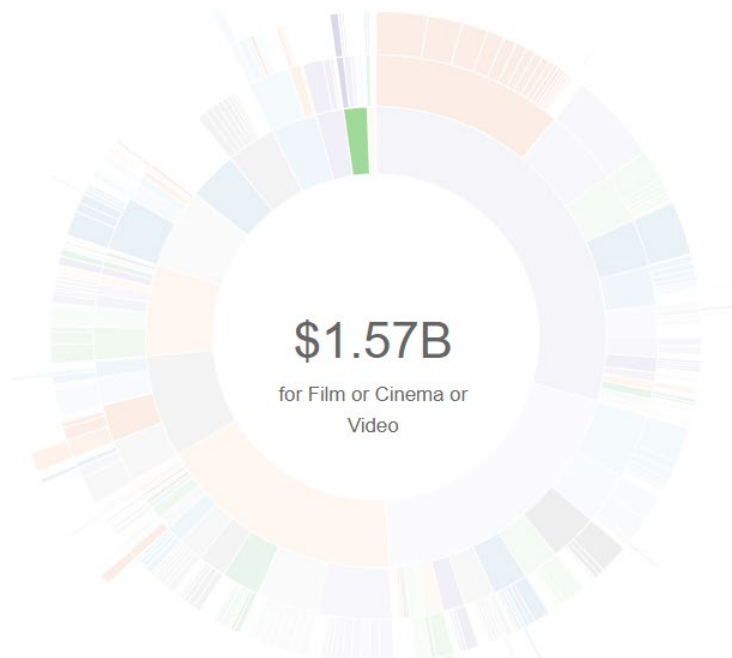
- 2) You can also use the funding wheel search a specific field
  - a. Click on the "Funding" tab at the top of the page on the home page



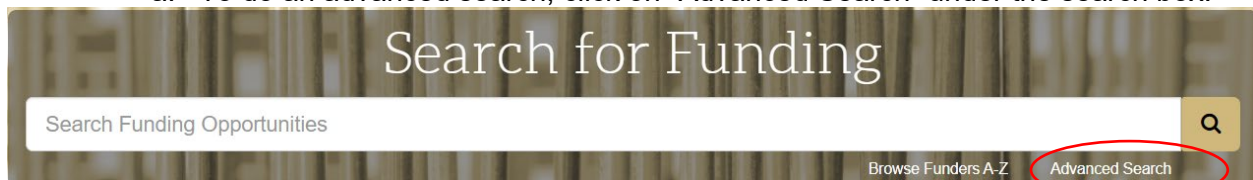
- b. The figure on the Funding Discovery page initially displays the total amount of funding available for all opportunities inside a series of concentric multi-colored rings. Move your mouse over the picture to display specific categories of opportunities and their corresponding funding amounts. General categories are on the inside ring, while more specific opportunities are on the middle and outside rings. The area currently under your mouse appears above the figure.

## Browse by Keyword

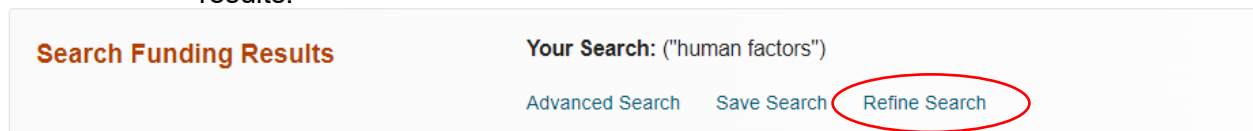
This chart is interactive. You can mouseover a section to see the total amount available per keyword. Click a section to view the list of matching opps. (Amount normalized to USD.)



- c. When you find a specific category that you would like to examine in detail, select the area. All funding opportunities related to that keyword appear, exactly as if you had performed a search for that keyword.
- 3) You can do an advanced search that allows you to set specific parameters to narrow down your search results. You can also refine a search that you have done using one of the two previously described methods.
  - a. To do an advanced search, click on “Advanced Search” under the search box.



- b. To refine a search, click on “Refine Search” at the top of the page of the search results.



- c. Fill out the following sections:
      - o **Match all of the fields / Match any of the fields** – The three rows of text boxes that appear by default enable you to select three fields to search for up to three texts. For field, select Abstract, Title, Sponsor or you can select **All Fields** in one

or more of the rows to search all fields for up to three texts. For more about the how to format these texts, see the basic search. To add more rows, select **Add another row**.

- **Activity Location Filter / Citizenship/Residency Filter** – These filters appear if they are configured by your institution, and you have not permanently disabled them. You can clear the filters for this search. To permanently disable these filters, see [Managing Your Account](#). See below for additional filters for both of these values.
  - **Amount** – Return an amount more or less than a certain value in USD, or unspecified.
  - **Deadlines** – Return relative or absolute deadlines based on the current or a specified date. You can also select optional or continuous/undefined deadlines.
  - **Limited Submission** – Return only opportunities that accept limited numbers of applications/proposals and/or opportunities that require some coordination at the university level prior to the funder deadline.
  - **Activity Location** – Return only opportunities from a specific location, is unrestricted, or is unspecified. Note that an additional activity location restriction might appear at the top of the page.
  - **Citizenship or Residency** – Return only opportunities available to citizens or residents of a specific location, is unrestricted, or is unspecified. Note that an additional citizenship or residency restriction might appear at the top of the page.
  - **Funding Type** – Return only opportunities matching one or more funding types.
  - **Keyword** – Return only opportunities that match one or more keywords (topics). Keywords are manually added to each funding opportunity by Pivot-RP's editorial team. As a result, selecting opportunities matching a keyword is likely to return more relevant results than using text.
    - Enter part of a keyword in the text box and select the matching keyword from the dropdown list. You can select multiple keywords. In addition, you can click **browse** to browse for keywords. Returned opportunities match all keywords you select.
  - **Applicant Type** – Return only opportunities available to one or more applicant types.
  - **Sponsor Type** – Return only opportunities available from one or more sponsor types.
  - **Country of Funder** – Return only opportunities available from a specified country.
  - **Recently Added** – Return only opportunities that were added in the last 7, 14, or 30 days.
- d. You can also indicate if there are any particular fields or information you want to exclude from the search.
- e. Click "Search" to execute the search.

4) You can save the results of any search

- a. Click on "Save Search" at the top of the search page.

**Search Funding Results**

Your Search: ("human factors")

Advanced SearchSave SearchRefine Search

- b. Name the search, and if you want a weekly email of updated opportunities for this search, check the box.

## Save your search



Choose a name for your search:

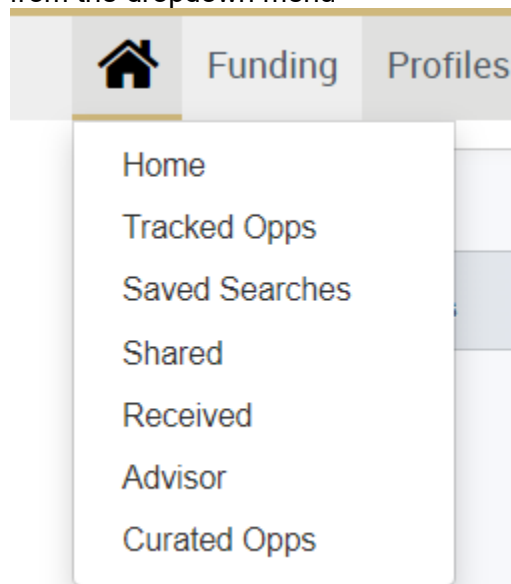
☒ Would you like to receive a weekly email containing new or updated opps from this query?

Cancel

Save

5) If you have saved a search but didn't check the box for email updates at the time you saved it, you can set up emails to be sent to you from the Saved Searches area.

- a. Click on the house icon in the upper left corner, and select "Saved Searches" from the dropdown menu



- b. Click on "options" for the saved search, and then click on "Alert email on."

### Email alerts

