Pivot:
Finding Funding & Collaborating Opportunities for International Postdocs

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Learning Objectives

By the end of the training, participants will be able to:

➢ Finding funding opportunities

  ➢ Search by text or sponsor or keywords

  ➢ Save, organize and share funding opportunities

  ➢ Set email alerts

➢ Find potential collaborators both inside and outside of UCSF

➢ Find information on calls for papers with deadlines about forthcoming conferences and special issues of scholarly journals.

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Pivot: one of the most comprehensive funding databases

➢ Is a multi-disciplinary searchable funding opportunities database

➢ Represents over 40,000 federal, private and international funding opportunities

➢ Matches faculty with funding opportunities

➢ Helps identify potential collaborators

➢ Edited daily by group of editors

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Setting Up an Account

➢ Need account in order to:

  ➢ Save search results
  ➢ Manage your home page (dashboard)
  ➢ Receive funding alerts

➢ Must register with UCSF email address

  ➢ Click on "Sign up," on the top right corner to set up an account
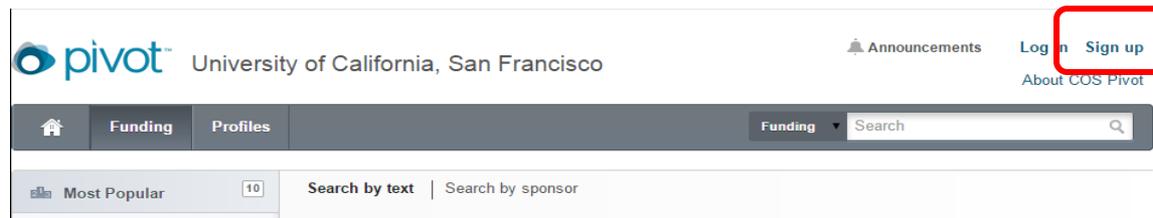
Setting Up an Account

➢ Once you have registered an account you will receive confirmation email

➢ Once you confirm, you may "claim" your profile

➢ Claiming your profile allows you to:

  ➢ Receive recommended opportunities from the Pivot Advisor
  ➢ Edit your profile

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Three Types of Searches

➢Text search

➢Sponsor Search

    ➢US federal
    ➢Private
    ➢Non-US federal

➢Advanced Search

TEXT SEARCH

➢ Most basic search

➢ Also called a Quick Search

➢ Is the default search mechanism on main search page

➢ Searches all fields (title, abstract, sponsor)

➢ Default connector is "and" (sleep disorders will search for sleep and disorders

➢ *Use quotation for exact phrase searching: "sleep disorders"*

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RESULTS PAGE

- Grant title
- Sponsor
- Deadline
- Amount

- Search results are always sorted by relevance, with the most relevant at the top

- Refine search results: Left side of page will provide a faceted breakout of results

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RESULTS PAGE

➢ Clicking on magnifying glass icon to the left of the title will provide the following information:
  ➢ Abstract
  ➢ Eligibility

➢ Clicking on title will link you to the full opportunity record, including:
  ➢ URL
  ➢ Sponsor
  ➢ Eligibility information
  ➢ Any information you requested in the search field will appear in red

SPONSOR SEARCH

➢ Search by:

  ➢ All sponsors (listed alphabetically)
  ➢ US federal sponsors
  ➢ Non-US federal sponsors

➢ Funding opportunities by sponsor
  ➢ Hyper-linked=active
  ➢ Grayed-out=not currently active but Pivot either knows or has reason to know the opportunity will be repeated or upcoming

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ADVANCED SEARCH

➢ Radio dial
  ➢ Keep defaults as "all fields" (vs. "any of the fields) for most specific search
  ➢ Connects rows (as opposed to fields) with "and" instead of "or" (which is what will appear if click on "any" radio dial)

➢ Drop-down box to left of search fields indicates what is included in the search:'
  ➢ Abstract
  ➢ Title
  ➢ Sponsor
  ➢ Sponsor ID

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Advanced Search

➢ **NOTE:** Use quotations for exact phrase search

➢ **IMPORTANT:** categories in "Find Opportunities Matching" are the same as in portion of screen labeled "exclude Opportunities Matching," found toward the bottom of the page. DO NOT CONFUSE THE TWO!

➢ Use broader terms to run a search.

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Useful Tips for International Postdocs – ADVANCED SEARCH

Useful Tips for International Postdocs – Do NOT Do IT!!!

Exclude Opportunities matching

not   All Fields ⬍   [   ] or [   ]

+ Add another row

▶ Deadlines

▶ Limited Submission

▶ Activity Location

▼ Citizenship or Residency ⓘ

☑ United States   United States x
☐ Canada
☐ United Kingdom
☐ Australia

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Useful Tips for Postdocs – Advanced Search

# Useful Tips for Postdocs, Junior faculty – Advanced Search

RESULTS PAGE

➢ Will always show query at top of page

➢ Classifies results (see faceted breakout on left)
  ➢ Top Funding Types
  ➢ Top Sponsor Types
  ➢ Top Requirements
  ➢ Top Keywords

➢ Allows you to:

  ➢ Save search
  ➢ Refine search

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SAVING & ORGANIZING SEARCH RESULTS

➢ Can save search queries (save search) or particular opportunity (track record)
➢ To save search query:
  ➢ Click on "Save Search" at top of results page
  ➢ Will ask you to name category
  ➢ Will ask if would like to receive email alerts (This is your funding alerts!!)
  ➢ "Save search" will appear on your Home page
  ➢ At any time, can run, edit or share that search
 ➢ Can save an unlimited number of search queries

SAVING & ORGANIZING SEARCH RESULTS

➢ To track record:
  ➢ Track from either the results page of from inside a record

➢ From the Results page:
  ➢ Click on empty box two over from the left opportunity title
  ➢ The following will appear immediately above title of first results:
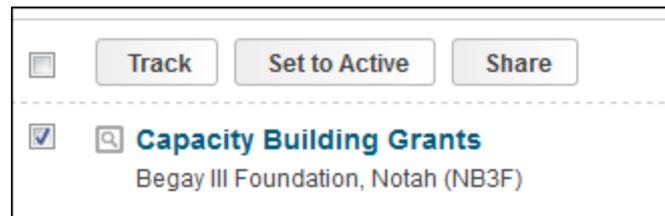
SAVING & ORGANIZING SEARCH RESULTS

➢ Choose which option would like:
Tack, Set to Active, Share or Export

➢ The following will appear:
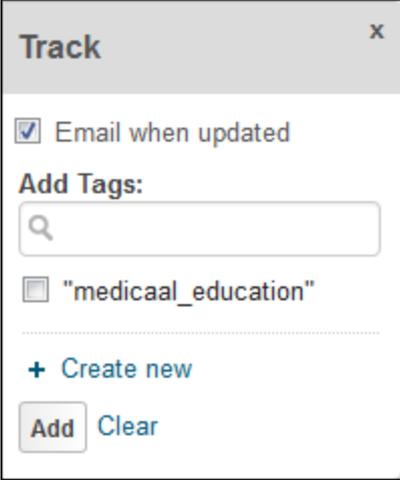
Track

☑ Email when updated

**Add Tags:**

🔍

☐ "medicaal_education"

+ Create new

Add | Clear

➢ **Tracked** opportunities are
those that you want to follow but may not be
pressing
➢ **Active** opportunities are those that want to follow
but may have more urgency (e.g., upcoming
deadline)

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# SAVING & ORGANIZING SEARCH RESULTS

➢ From within a record:

  ➢ Will see options on top right of page
  ➢ Click on whichever option you want
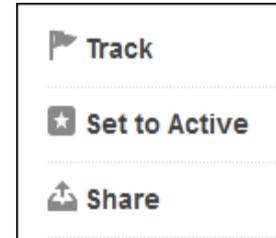
➢ **Note:** When naming a tracked or active record, there may not be any dead space in between characters; you must use underscores, periods, etc., between words

➢ All results will appear on your Home page

SHARING SEARCH RESULTS

➢ Can do so from either the results page or within the record

➢ Follow same steps as for tracking a record, beginning with clicking on box two to the left of the opportunity title and will see:

☐	Track	Set to Active	Share
☑	🔍 **Capacity Building Grants**		
	Begay III Foundation, Notah (NB3F)		
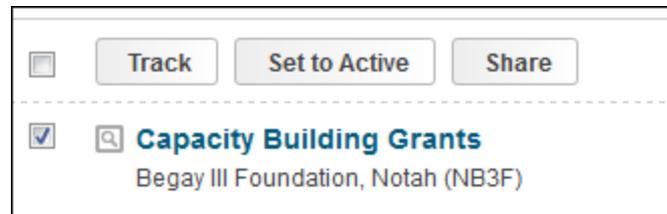
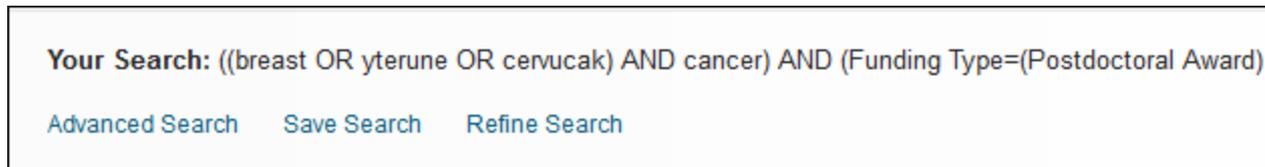➢ Click on Share and follow steps delineated

SHARING SEARCH RESULTS

➢ To view opportunities shared

  ➢ Click on Home tab on top left of screen
  ➢ Will see column on left-hand side containing a faceted breakout of :
    ➢ Active
    ➢ Tracked
    ➢ Saved Searches
    ➢ Shared
    ➢ Shared Received
    ➢ Advisor

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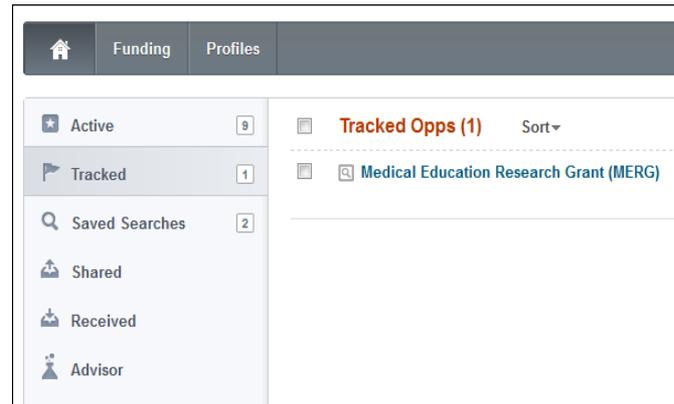
FUNDING ALERTS

➤ To set up Pivot Funding Alerts:

   ➤ Must have Pivot user account
   ➤ Will see the following at the top of **Results** page

Your Search: ((breast OR yterune OR cervucak) AND cancer) AND (Funding Type=(Postdoctoral Award)

Advanced Search   Save Search   Refine Search

   ➤ Click on **Save Search** and follow steps delineated
   ➤ Query will be stored on your **Home** page
   ➤ Can save an unlimited number of searches
   ➤ **Note:** remember, you are _saving your query_, not your results!

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PROFILES

➢ Recommend creating your profile
➢ Link to funding opportunities uniquely matched to your scholar profile

PROFILES:
Finding Collaborators

➤ Click on **Profiles** tab
- ➤ Can search by:
- ➤ Text
- ➤ Faculty name
- ➤ Advanced search

➤ Follow same rules as with Advanced Search

➤ Will see faceted breakout column on left of results page

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Paper Invited

- Find information on calls for papers with deadlines about forthcoming conferences and special issues of scholarly journals.

QUICK GUIDES & SUPPORT

➢[Online tutorials by ProQuest](#)
➢[Monthly PIVOT class](#)
➢[Grants Subject Guide](#)

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Questions?

Thank you!

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