

Pivot: Finding Funding & Collaborating Opportunities for International Postdocs



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UCSF LIBRARY
and Center for Knowledge Management

Learning Objectives

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

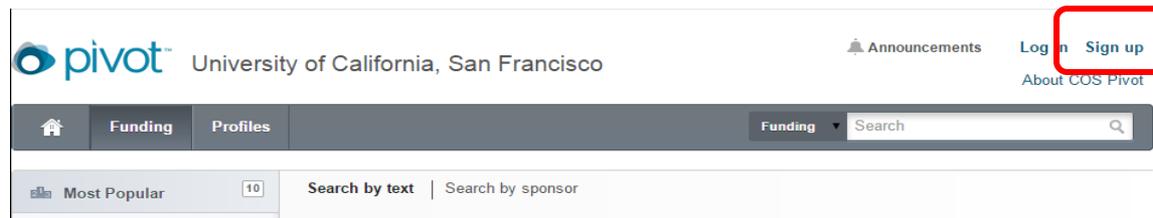
- Finding funding opportunities
 - Search by text or sponsor or keywords
 - Save, organize and share funding opportunities
 - Set email alerts
- Find potential collaborators both inside and outside of UCSF
- Find information on calls for papers with deadlines about forthcoming conferences and special issues of scholarly journals.

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

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





Funding

Profiles

Funding ▾

Search



Create your Pivot Account

You must be affiliated with an institution that subscribes to Pivot in order to create an account. You will receive a verification email. Once your account is created, your email address will be your Pivot user id.

All fields required.

Name

Email

Password

Re-enter password

Affiliated Member Institution ▾

Create my 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



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”*



RESULTS PAGE

- Grant title
- Sponsor
- Deadline
- Amount

University of California, San Francisco

Funding "sleep disorders"

Search Funding Results Your Search: ("sleep disorders")

Advanced Search Save Search Refine Search

53 Results Sort

Submission type	Grant Title	Sponsor	Deadline	Amount
Limited Submission: 1	Educational Projects Award	American Academy of Sleep Medicine (ASM) American Sleep Medicine Foundation (ASMF)	To be announced Application Anticipated	\$75,000 use
Research: 33	PRIDE-GE Summer Institute in Cardiovascular Genetic Epidemiology With a Focus on Cardiovascular and Other Heart, Lung, Blood and Sleep Disorders	Washington University in St. Louis School of Medicine	01 Mar 2016 Application Anticipated	see record

- 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

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

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

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.

Useful Tips for International Postdocs – ADVANCED SEARCH

▼ Citizenship or Residency ⓘ

United States

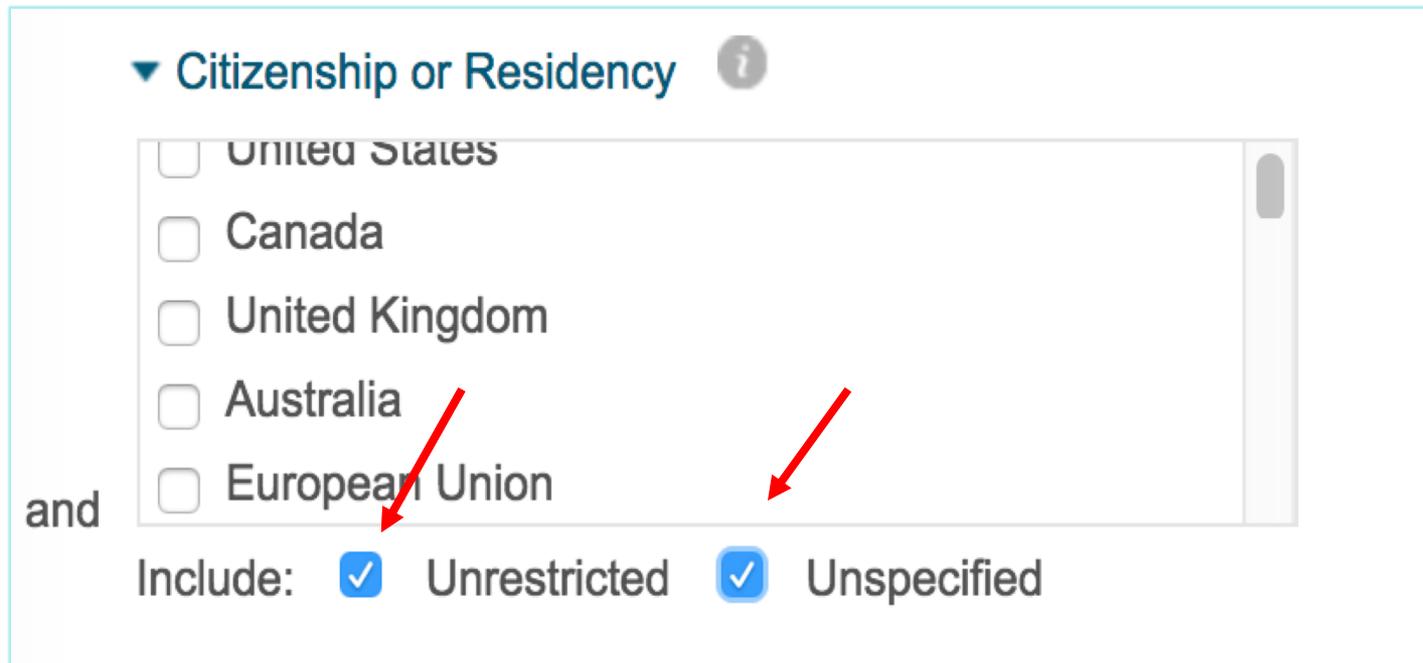
Canada

United Kingdom

Australia

and European Union

Include: Unrestricted Unspecified



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

Exclude Opportunities matching

not or

[+ Add another row](#)

[▶ Deadlines](#)

[▶ Limited Submission](#)

[▶ Activity Location](#)

[▼ Citizenship or Residency i](#)

- United States
- Canada
- United Kingdom
- Australia

x

Useful Tips for Postdocs – Advanced Search

▼ Funding Type

- Publishing or Editorial
- Research
- Training, Scholarship, or Fellowship
- Travel
- and Visiting Personnel



Useful Tips for Postdocs, Junior faculty – Advanced Search

▼ Applicant Type

- Government
- Individuals: Graduate Student
- Individuals: Early Career and Emerging in Field
- Individuals: Mid-Career to Established in Field

and

RESULTS PAGE

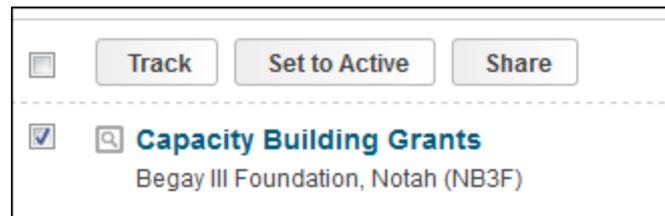
- Will always show query at top of page
- Classifies results (see faceted breakout on left)
 - Top Funding Types
 - Top Sponsor Types
 - Top Requirements
 - Top Keywords
- Allows you to:
 - Save search
 - Refine search

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

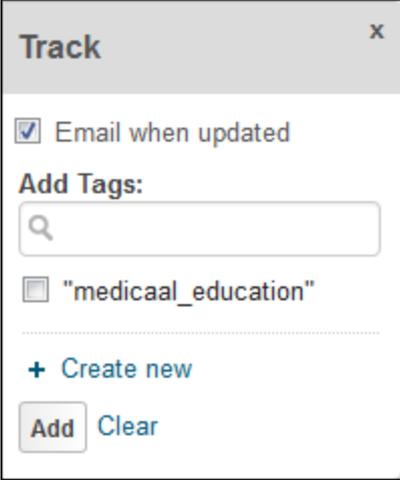
SAVING & ORGANIZING SEARCH RESULTS

- To track record:
 - Track from either the results page or 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:
Track, Set to Active, Share or Export
- The following will appear:



Track x

Email when updated

Add Tags:

"medicaal_education"

+ Create new

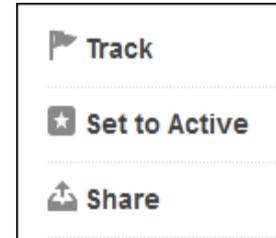
Add Clear

- **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)

SAVING & ORGANIZING SEARCH RESULTS

➤ From within a record:

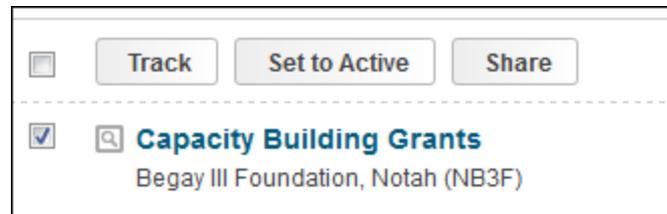
- Will see options on top right of page
- Click on whichever option you want



- **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

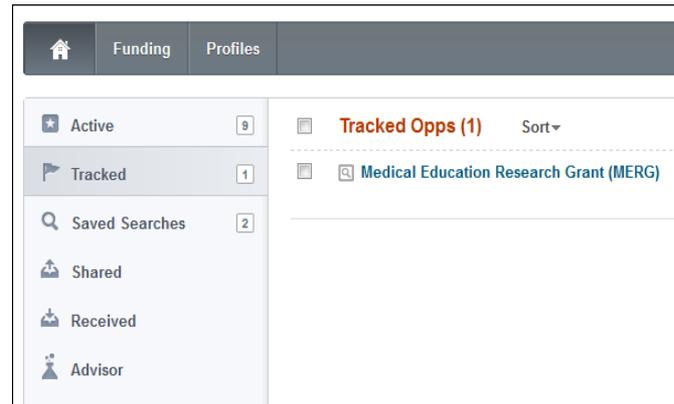
- Can do so from either the results page or within the record
- Follow same steps as for tracking a record, beginning with clicking on box two to the left of the opportunity title and will see:



- Click on Share and follow steps delineated

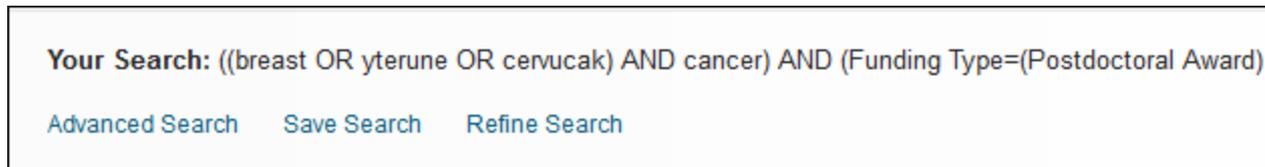
SHARING SEARCH RESULTS

- 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



FUNDING ALERTS

- To set up Pivot Funding Alerts:
 - Must have Pivot user account
 - Will see the following at the top of **Results** page



- 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!

PROFILES

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

Adam N. Gazzaley
Professor, Department of Neurology
School of Medicine, University of California, San Francisco

Overview | Publications (102) | Grants (28)

Personal Website: <http://profiles.ucsf.edu/adam.gazzaley> more »

Publication Page: <http://www.cin.ucsf.edu/WORD/Faculty/Adam%20Gazzaley/Publication...> more »

CV Page: <http://gazzaleylab.ucsf.edu/wp-content/uploads/2016/03/Gazzaley-CV-4...> more »

ISNI: 0000 0001 3797 8617

Expertise Primary Research Interest: Neurobiology Neural Mechanisms of Attention and Memory

Contact Details
✉ adam.gazzaley@ucsf.edu
San Francisco, CA
United States

Funding Matches:
27 funding opportunities
162 funding opportunities for your department

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

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!

