

# Pivot Quick Start Guide

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Funding Opportunities Coordinator



# Creating an Account

The screenshot shows a web browser window with the URL <https://pivot.proquest.com/> in the address bar, highlighted by a red box and a red arrow. The page features the UC Davis logo and the text "Funding opportunities powered by pivot". A navigation bar includes links for "Funding", "Profiles", and "Papers Invited", along with a search bar. In the top right corner, there are links for "Announcements", "Log in", and "Sign up", with the "Sign up" link highlighted by a red box and a red arrow. The main content area includes a sidebar with categories like "Most Popular", "Editor's Pick", "Health Science Funding News", "Humanities and Social Science Funding News", and "Internal Opps". The main content area also has a search section with options for "Search by text", "Search by sponsor", and "Search by keyword", a search input field, a "Search Pivot" button, and a "View Tutorial" link. Below the search section, there is a "Funding Discovery" heading and a paragraph explaining the service.

Funding Discovery | Pivot

<https://pivot.proquest.com/>

**UCDAVIS**  
UNIVERSITY OF CALIFORNIA

Funding opportunities powered by **pivot**

Announcements Log in **Sign up**

Home Funding Profiles Papers Invited Funding Search

**Funding Discovery**

Most Popular 10  
Editor's Pick 4  
Health Science Funding News 4  
Humanities and Social Science Funding News 4  
Internal Opps 2

**Search by text** | Search by sponsor | Search by keyword

Search funding opportunities Search Pivot View Tutorial

Advanced Search Search Tips

**Funding Discovery**

To keep pace with growing and evolving research fields, Pivot's expert editors continuously update an authoritative list of keywords that are carefully matched to each Pivot funding opportunity. Enter search terms above or browse by keyword to explore the latest funding opportunities and research trends.

# Creating an Account

## Create your Pivot Account

You must be affiliated with an institution that subscribes to Pivot in order to create an account.

**There are two ways to create an account and access Pivot.** Some institutions allow you to use your institutional login credentials, **or** you may use your institutional email address as your user ID and create a password of your choosing.

Choose an option below. Once your account is created, you will receive a verification email.

[Use Institutional Login Credentials](#)

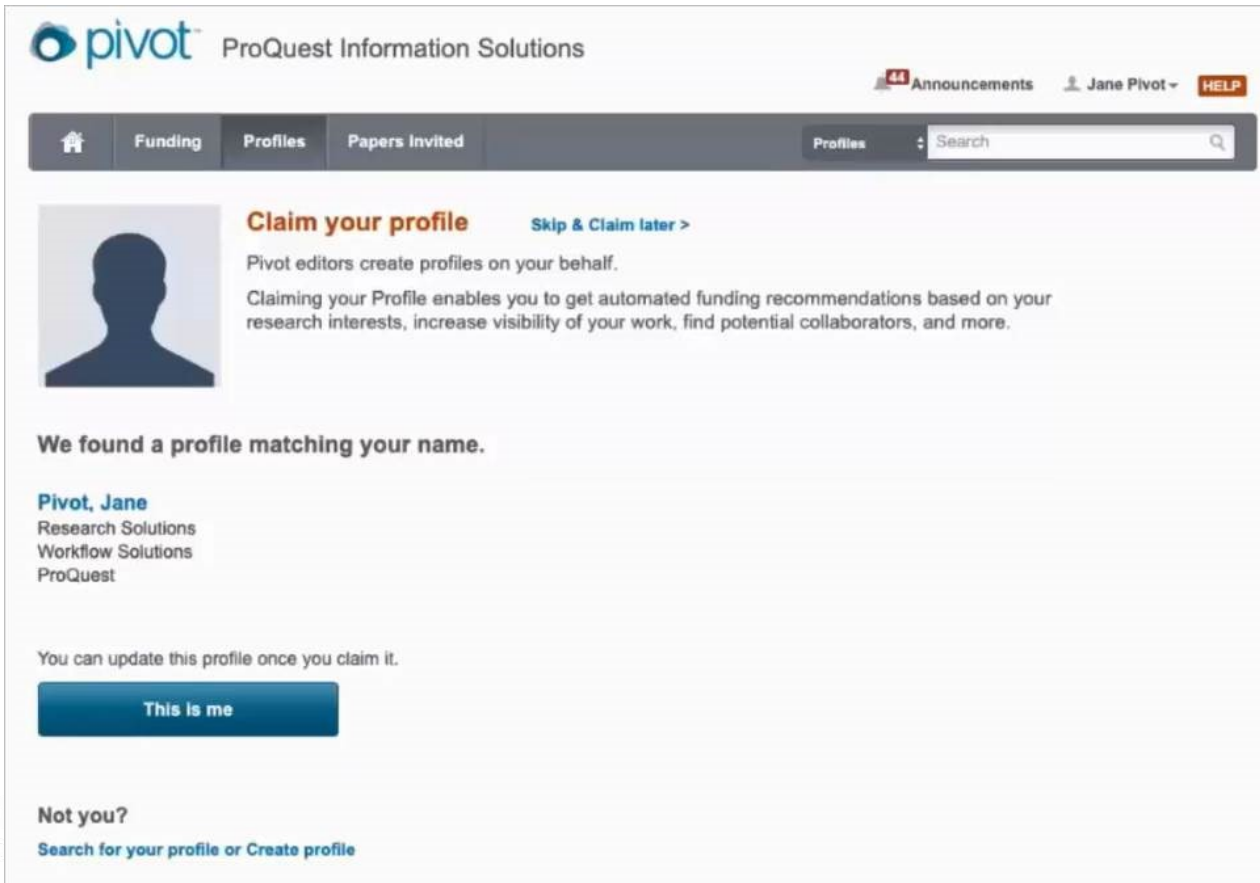
OR

[Use Email Address/Create Password](#)

Already have an account? [Log in here](#)

- On the “Create Your Account” page, select “Use Email Address/Create Password”
- Fill out the form; be sure to use your UC Davis email address
- Pivot will send you a verification email, and then you will be able to log into Pivot

# Claim Your Profile



The screenshot shows the Pivot ProQuest Information Solutions website. At the top, there's a navigation bar with 'Funding', 'Profiles', and 'Papers Invited' tabs. Below this, a 'Claim your profile' section is highlighted. It features a silhouette icon and text explaining that Pivot editors create profiles on behalf of users. A message states, 'We found a profile matching your name.' Below this, the name 'Pivot, Jane' is listed with associated solutions. A blue button labeled 'This is me' is provided for claiming the profile. At the bottom, there's a link to 'Search for your profile or Create profile'.

**Claim your profile** [Skip & Claim later >](#)

Pivot editors create profiles on your behalf.

Claiming your Profile enables you to get automated funding recommendations based on your research interests, increase visibility of your work, find potential collaborators, and more.

**We found a profile matching your name.**

**Pivot, Jane**  
Research Solutions  
Workflow Solutions  
ProQuest

You can update this profile once you claim it.

[This is me](#)

**Not you?**  
[Search for your profile](#) or [Create profile](#)

- When you log in for the first time, Pivot will now prompt you to “Claim Your Profile.” Claiming your profile will allow the database to understand your funding needs better.
- If the information that Pivot has about you is incorrect, be sure to update it.
- You can also skip this stage and claim your profile later.

# Using the Funding Tab

The screenshot displays the UC Davis Pivot website's funding opportunities page. At the top, the UC Davis logo is on the left, and 'Funding opportunities powered by pivot' is on the right. A navigation bar contains links for Home, Funding (highlighted with a red box), Profiles, Papers Invited, and Admin. To the right of the navigation bar are links for Announcements, a user profile for Megan Sparling, and a HELP button. Below the navigation bar, the 'Funding Discovery' section is active. It includes a search bar with the placeholder 'Search funding opportunities' and a 'Search Pivot' button. To the left of the search bar are links for 'Advanced Search' and 'Search Tips'. Below the search bar, the 'Funding Discovery' section is titled, followed by a paragraph explaining that Pivot's expert editors continuously update an authoritative list of keywords. Below this is a 'Browse by Keyword' section with a 'Take a Tour' link. At the bottom of the page, there is a sunburst chart showing the distribution of funding opportunities by keyword.

- To search for funding in the Pivot database, you will use the “Funding” tab.
- This tab offers a few ways to search for funding, but we will focus on the most efficient way.



# Using the Funding Tab

UCDAVIS  
UNIVERSITY OF CALIFORNIA

Funding opportunities  
powered by **pivot**

Announcements Megan Sparling HELP

Home Funding Profiles Papers Invited Admin

Funding Search

Funding Discovery

Search by text | Search by sponsor | Search by keyword

Search funding opportunities Search Pivot View Tutorial

Advanced Search Search Tips

**Funding Discovery**

To keep pace with growing and evolving research fields, Pivot's expert editors continuously update an authoritative list of keywords that are carefully matched to each Pivot funding opportunity. Enter search terms above or browse by keyword to explore the latest funding opportunities and research trends.

**Browse by Keyword** [Take a Tour](#)

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

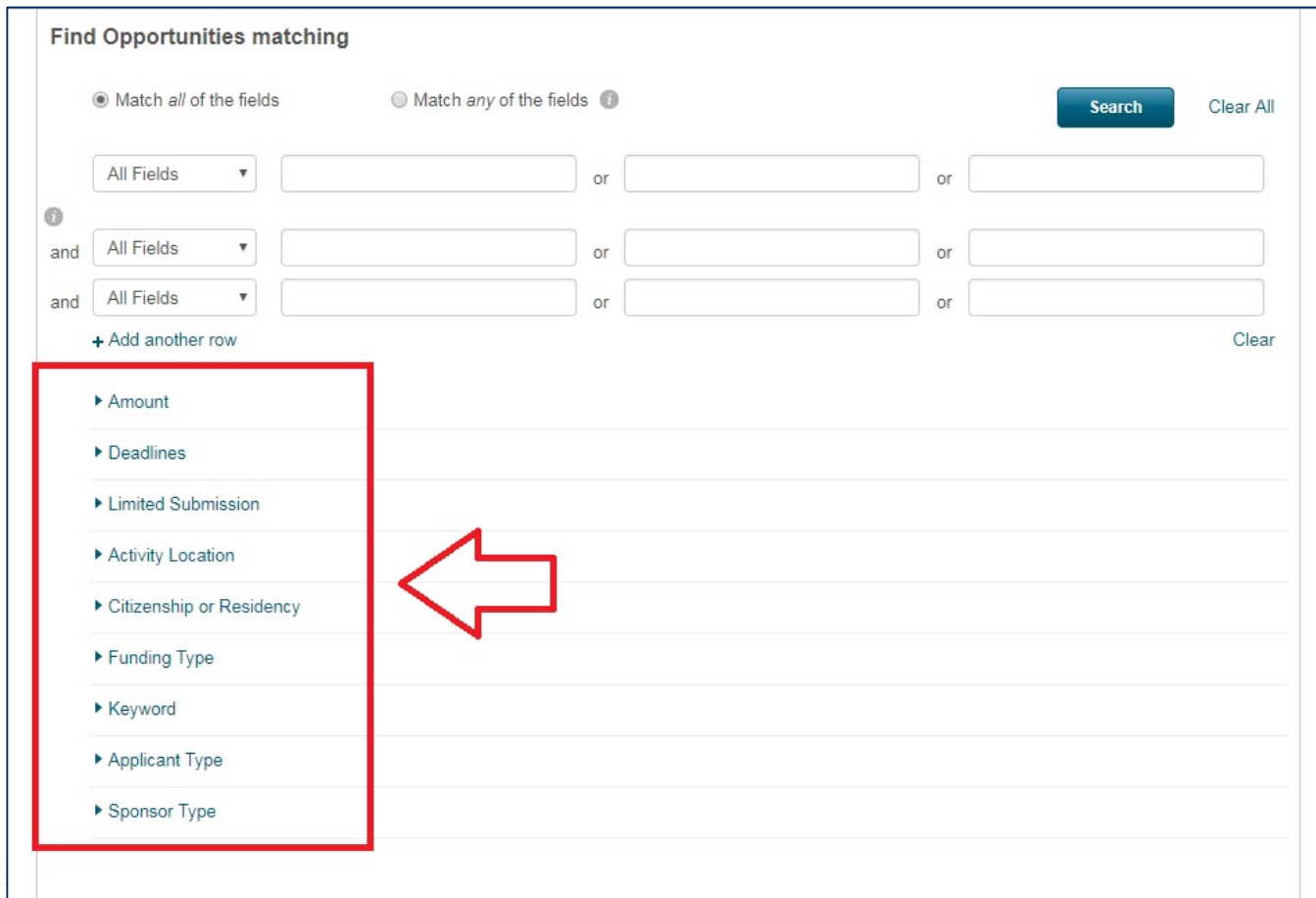
- You may be tempted to type search terms into the quick-search boxes, but I do not recommend it.
- This is because you have very little control over the results that you get back.
- If you know the exact name of the funding program you are looking for, go ahead and type that name in the box to find the program's page. But to run a funding search, continue to the next step.

# Advanced Search

- The Advanced Search tool is the most efficient way to search the database.
- You can also use the Advanced Search to create “Saved Searches,” which offer a weekly email that updates you of new funding opportunities that meet your search terms – automating your search process.
- The rest of this guide explains how to use these features.

The screenshot shows the UC Davis Pivot Funding Discovery website. The top navigation bar includes the UC Davis logo, the text 'Funding opportunities powered by pivot', and user information for Megan Sparling. Below this is a dark blue navigation bar with links for Home, Funding, Profiles, Papers Invited, and Admin. A search bar is located on the right side of this bar. The main content area is divided into a left sidebar and a main panel. The sidebar contains links for Funding Discovery, Most Popular (10), Editor's Pick (4), Health Science Funding News (4), Humanities and Social Science Funding News (4), and Internal Opps (2). The 'Advanced Search' link is highlighted with a red box. The main panel features a search bar with the text 'Search by text | Search by sponsor | Search by keyword' and a 'Search Pivot' button. Below the search bar, there is a section titled 'Funding Discovery' with a description of the tool and a 'Browse by Keyword' section with a sunburst chart. A 'Take a Tour' link is also present.

# Advanced Search: Categories



The screenshot displays the 'Find Opportunities matching' section of an advanced search tool. It features two radio buttons for search logic: 'Match all of the fields' (selected) and 'Match any of the fields'. A 'Search' button and a 'Clear All' link are positioned to the right. Below these are three rows of search criteria, each starting with a dropdown menu currently set to 'All Fields', followed by text input fields and 'or' connectors. A '+ Add another row' link is located below the third row. On the left side, a list of search categories is shown, each preceded by a right-pointing arrow: Amount, Deadlines, Limited Submission, Activity Location, Citizenship or Residency, Funding Type, Keyword, Applicant Type, and Sponsor Type. A red rectangular box highlights this list, and a large red arrow points from the box towards the search criteria input fields.

- When you use the Advanced Search tool, you can use the categories that Pivot itself uses to categorize and classify each funding opportunity, making your search more efficient.
- Not all of these categories will be relevant to all of your searches, but you can choose which ones are applicable to the current search you are running.
- We will go over the most commonly used categories now.



# Advanced Search: Funding Type

Activity Location

Citizenship or Residency

Funding Type

☒ Research

☐ Training, Scholarship, or Fellowship

☒ Travel

☐ Visiting Personnel

Research x Travel x

Clear

and

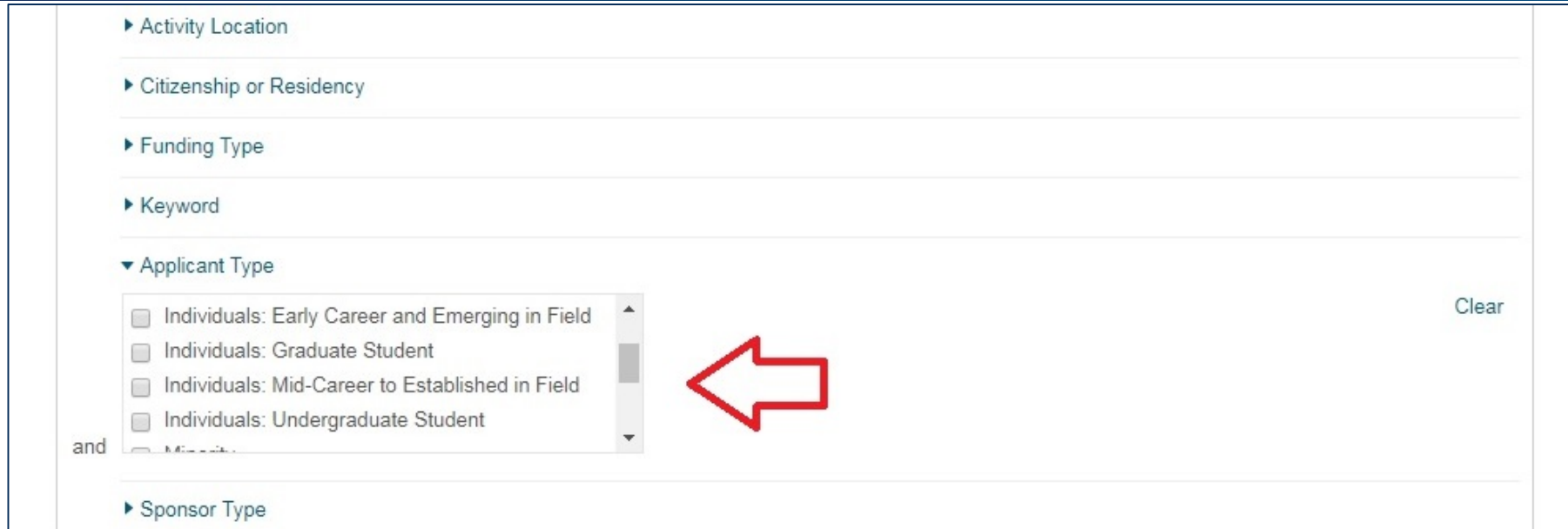
Keyword

Applicant Type

Sponsor Type

- For example, the “Funding Type” category is a good place to start. It shows you all the types of funding listed in the Pivot database.
- Here I have selected “Research” and “Travel,” and the search form has listed my selections in gray to the right.

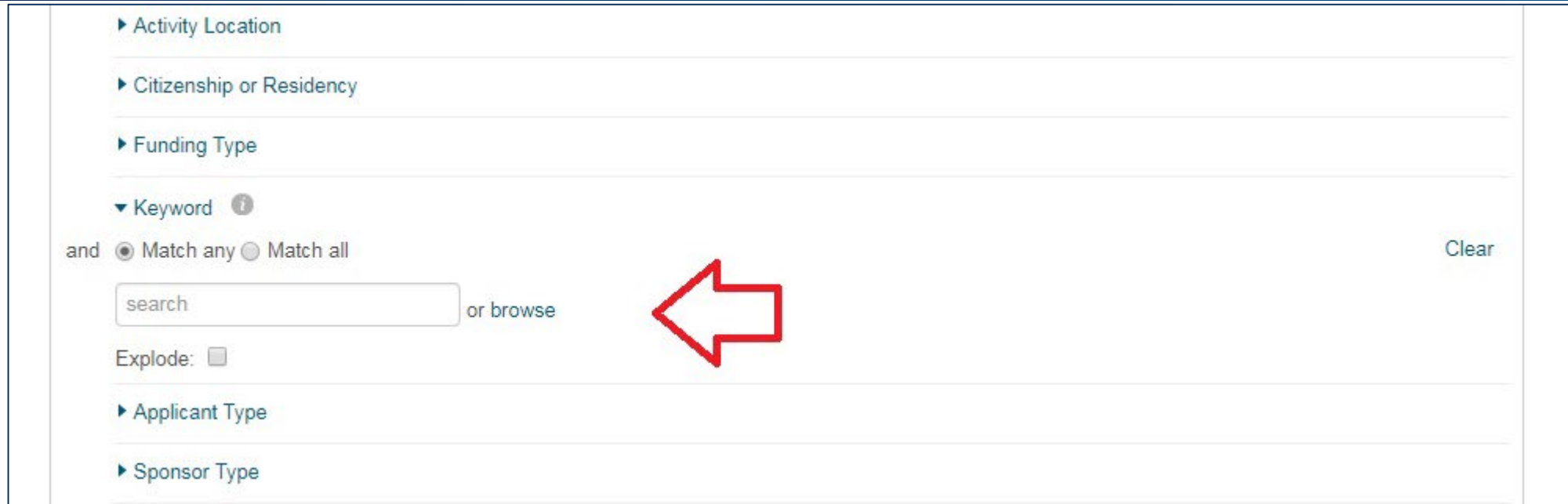
# Advanced Search: Applicant Type



The screenshot shows a search interface with several filter categories: Activity Location, Citizenship or Residency, Funding Type, Keyword, Applicant Type, and Sponsor Type. The 'Applicant Type' section is expanded, showing a list of options with checkboxes: Individuals: Early Career and Emerging in Field, Individuals: Graduate Student, Individuals: Mid-Career to Established in Field, and Individuals: Undergraduate Student. A red arrow points to this section. A 'Clear' button is visible to the right of the list.

- Another useful category is “Applicant Type”
- You can use this category to find funding opportunities that are specifically for early career researchers, women, undergraduates, and other specific groups.
- If you are looking for funding opportunities for faculty more generally, you can also use “Academic Institution” -- as faculty apply on behalf of their academic institution.

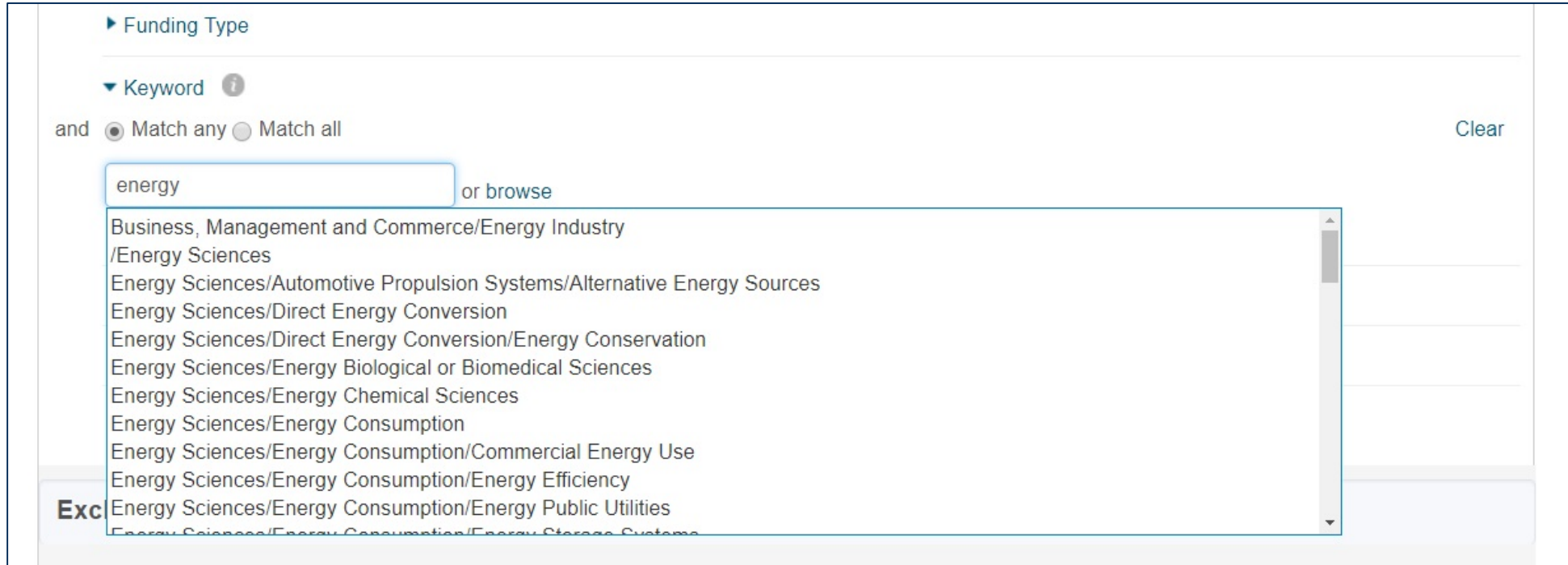
# Advanced Search: Keyword



The screenshot shows the 'Advanced Search' interface. It features several expandable sections: 'Activity Location', 'Citizenship or Residency', 'Funding Type', 'Keyword' (which is currently expanded), 'Applicant Type', and 'Sponsor Type'. The 'Keyword' section includes a search box with the placeholder text 'search', a 'or browse' link, and an 'Explode' checkbox. To the right of the search box is a 'Clear' button. A large red arrow points from the right side of the slide towards the 'search' input field. The 'and' operator is set to 'Match any'.

- Another useful search category is “Keyword.” This is where you can narrow your search to specific academic disciplines, research areas, etc.
- You can use the Keyword tool by either typing things into the search box, or exploring the keyword folders. There is more information on these two methods in the following slides.

# Keyword – Method One



The screenshot shows a search interface with the following elements:

- Funding Type**: A dropdown menu.
- Keyword**: A dropdown menu with an information icon.
- and**: A label.
- Match any**: A radio button (selected).
- Match all**: A radio button.
- Clear**: A button.
- energy**: Text entered in the search box.
- or browse**: A link.
- Keyword suggestions**: A list of folders where the word 'energy' appears, organized from larger to more specific folders using forward slashes:
  - Business, Management and Commerce/Energy Industry
  - /Energy Sciences
  - Energy Sciences/Automotive Propulsion Systems/Alternative Energy Sources
  - Energy Sciences/Direct Energy Conversion
  - Energy Sciences/Direct Energy Conversion/Energy Conservation
  - Energy Sciences/Energy Biological or Biomedical Sciences
  - Energy Sciences/Energy Chemical Sciences
  - Energy Sciences/Energy Consumption
  - Energy Sciences/Energy Consumption/Commercial Energy Use
  - Energy Sciences/Energy Consumption/Energy Efficiency
  - Energy Sciences/Energy Consumption/Energy Public Utilities
  - Energy Sciences/Energy Consumption/Energy Storage Systems

- Here I typed “energy” into the textbox, and Pivot displayed all of the keyword folders where the word appears. You can see the organization from larger to more specific folders through their use of the forward slash symbol.

# Keyword – Method Two

► Funding Type

▼ Keyword ⓘ

and ☒ Match any ☐ Match all

search or browse

Explode: ☐

► Applicant Type

► Sponsor Type

- Or you can click “Browse” and navigate the keyword folders by starting with the general folders, and clicking the small arrows to dial down to more specific sub-folders.

Find Opportunities matching

☒ Match all of the fields ☐ Match any of the fields ⓘ

All Fields ▼

and All Fields ▼

and All Fields ▼

+ Add another row

► Amount

► Deadlines

► Limited Submission

► Activity Location

► Citizenship or Residence

► Funding Type

▼ Keyword ⓘ

and ☒ Match any ☐ Match all

search or browse

Explode: ☐

**Keyword Browser** ✕

- 📁 Agriculture and Food Sciences
  - 📁 Agriculture
  - 📁 Food Science
  - 📁 Foods
- 📁 Area Studies
- 📁 Arts and Humanities
- 📁 Business, Management and Commerce
- 📁 Education
- 📁 Energy Sciences
- 📁 Engineering
- 📁 Health and Medicine



# Running an Advanced Search

☒ Match all of the fields ☐ Match any of the fields ⓘ

or  or

and  or  or

and  or  or

+ Add another row Clear

► Amount

► Deadlines

► Limited Submission

▼ Activity Location ⓘ

and ☒ Match any ☐ Match all

or more locations  x ✓

Include: ☒ Unrestricted ☐ Unspecified  
☒ Sub-entities ☒ Super-entities

► Citizenship or Residency

▼ Funding Type

☐ Artistic Pursuit ☐ Collaboration or Cooperative Agreement  
☐ Contract or Tender ☐ Dissertation or Thesis  
☐ Equipment or Materials Acquisition or Facility Use

and  x ✓

Clear

▼ Keyword ⓘ

and ☒ Match any ☐ Match all

or browse  x ✓

Clear

- Once you have made selections in the relevant categories to your search, you will click the blue “Search” button
- You will be able to return to your selections and tweak them, if you do not like the results that you get back

# Refining an Advanced Search

**Search Funding Results**

Your Search: ((Keywords=(Sustainable Agriculture)) OR (Exploded Keywords=(Sustainable Agriculture))) AND (Activity Location=(California or Unrestricted)) OR (Activity Location Sub-entity=(California) OR (Activity Location Super-... more »)

Advanced Search Save Search **Refine Search**

**Set by your institution** ⓘ

**Citizenship/Residency**  
United States OR Unrestricted

**Top funding types**  
Research: 19  
Program or Curriculum ...: 4  
Training or Scholarshi...: 3  
Meeting or Conference ...: 2  
Travel: 2

**Top sponsor types**  
Federal, U.S.: 7  
Other Nonprofit: 5  
Professional Society o...: 3  
Multinational Organiza...: 2  
Private Foundation: 1

**Top applicant types**  
Individuals: Mid-Caree...: 13  
Individuals: Early Car...: 13  
Nonprofit: 7  
Academic Institution: 7  
Government: 6

**Top keywords**  
Sustainable Agriculture: 19  
Agriculture and Food S...: 6

**19 Results** Sort ▾

	Deadline	Amount
<input type="checkbox"/> <b>BCFN Yes! Young Earth Solutions Research Grant</b> Barilla Center for Food and Nutrition (BCFN)	14 Jun 2019 Proposals Anticipated	€20,000 EUR
<input type="checkbox"/> <b>Professional + Producer Grants (PPG)</b> United States Department of Agriculture (USDA) National Institute of Food and Agriculture (NIFA) Sustainable Agriculture Research and Education (SARE)	28 Nov 2019 Full Proposal Anticipated	\$50,000 USD
<input type="checkbox"/> <b>Western SARE Graduate Student Grants in Sustainable Agriculture</b> United States Department of Agriculture (USDA) National Institute of Food and Agriculture (NIFA) Sustainable Agriculture Research and Education (SARE)	09 Jan 2020 Proposals Anticipated	\$25,000 USD
<input type="checkbox"/> <b>Research Grants</b> Ekhagastiftelsen (Ekhaga Foundation)	20 May 2019 Application Anticipated	see record
<input type="checkbox"/> <b>Olam Prize for Innovation in Food Security</b> Agropolis Fondation	28 Feb 2019 Proposals Confirmed	\$75,000 USD
<input type="checkbox"/> <b>Farmer/Rancher Grants</b> United States Department of Agriculture (USDA) National Institute of Food and Agriculture (NIFA) Sustainable Agriculture Research and Education (SARE)	28 Nov 2019 Full Proposal Anticipated	\$25,000 USD
<input type="checkbox"/> <b>Western SARE Research and Education Grant</b> United States Department of Agriculture (USDA) National Institute of Food and Agriculture (NIFA) Sustainable Agriculture Research and Education (SARE)	04 Jun 2019 Preliminary Pr... Anticipated	\$350,000 USD

- After clicking “Search,” you will get a list of results. Ideally, you should get a list that you are willing to sift through in one sitting. If there are more results than that, consider narrowing your search.
- If you want to narrow, broaden, or tweak your search terms, click on “Refine Search”
- Pivot will take you back to the Advanced Search page, with all of your selections still listed. Then you can tweak them.

# Creating a Saved Search

**Search Funding Results**

Your Search: ((Keywords=(Sustainable Agriculture)) OR (Exploded Keywords=(Sustainable Agriculture))) AND (Activity Location=(California or Unrestricted)) OR (Activity Location Sub-entity=(California) OR (Activity Location Super-... more »)

Advanced Search **Save Search** Refine Search

**Set by your institution** ?

**Citizenship/Residency**  
United States OR Unrestricted

**Recently added**  
Last 7 days: 1

**Submission type**  
Limited Submission: 1

**Top funding types**  
Research: 22  
Program or Curriculum ...: 7  
Training or Scholarshi...: 3  
Meeting or Conference ...: 2  
Travel: 2

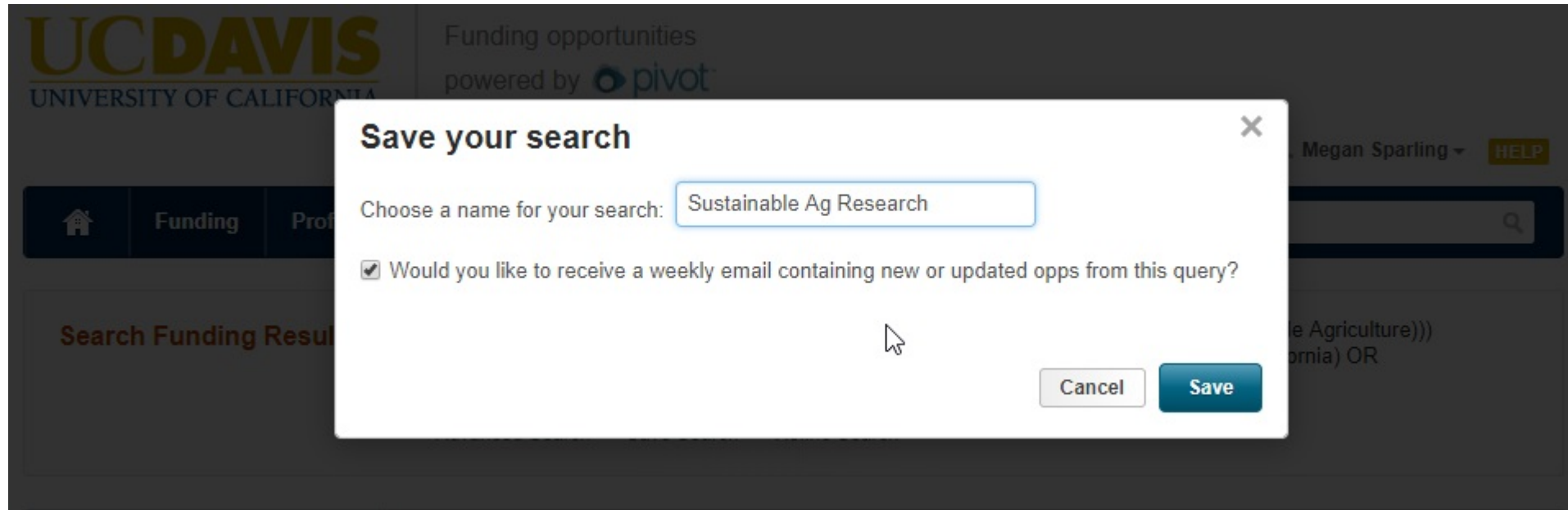
**Top sponsor types**  
Federal, U.S.: 10  
Other Nonprofit: 5  
Professional Society o...: 3  
Multinational Organiza...: 2  
Private Foundation: 1

22 Results Sort ▾

	Deadline	Amount
<input type="checkbox"/> <b>BCFN Yes! Young Earth Solutions Research Grant</b> Barilla Center for Food and Nutrition (BCFN)	14 Jun 2019 <a href="#">Proposals</a> <a href="#">Anticipated</a>	€20,000 EUR
<input type="checkbox"/> <b>Professional + Producer Grants (PPG)</b> United States Department of Agriculture (USDA) National Institute of Food and Agriculture (NIFA) Sustainable Agriculture Research and Education (SARE)	28 Nov 2019 <a href="#">Full Proposal</a> <a href="#">Anticipated</a>	\$50,000 USD
<input type="checkbox"/> <b>Western SARE Graduate Student Grants in Sustainable Agriculture</b> United States Department of Agriculture (USDA) National Institute of Food and Agriculture (NIFA) Sustainable Agriculture Research and Education (SARE)	09 Jan 2020 <a href="#">Proposals</a> <a href="#">Anticipated</a>	\$25,000 USD
<input type="checkbox"/> <b>Federal-State Marketing Improvement Program (FSMP)</b> United States Department of Agriculture (USDA) Agricultural Marketing Service (AMS)	05 Apr 2019 <a href="#">Application</a> <a href="#">Confirmed</a>	\$250,000 USD
<input type="checkbox"/> <b>Acer Access and Development Program</b> United States Department of Agriculture (USDA) Agricultural Marketing Service (AMS)	10 May 2019 <a href="#">Application</a> <a href="#">Confirmed</a>	\$500,000 USD
<input type="checkbox"/> <b>Research Grants</b> Ekhagastiftelsen (Ekhaga Foundation)	20 May 2019 <a href="#">Application</a> <a href="#">Anticipated</a>	see record

- If you like your search results, and you would like to save this search—and have the database keep running this search for you once per week—click “Save Search”

# Creating a Saved Search



The screenshot shows the UC Davis Pivot search interface. A modal dialog box titled "Save your search" is centered on the screen. The dialog has a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled "Choose a name for your search:" with the text "Sustainable Ag Research" entered. Below this, there is a checkbox that is checked, with the text "Would you like to receive a weekly email containing new or updated opps from this query?". At the bottom right of the dialog are two buttons: "Cancel" and "Save". The background of the interface is dark grey. At the top left, the UC Davis logo is visible. To the right of the logo, it says "Funding opportunities powered by pivot". Below the logo, there are navigation tabs: "Home", "Funding", and "Profile". On the right side of the background, there is a user profile section for "Megan Sparling" with a "HELP" button. Below that is a search bar with a magnifying glass icon. At the bottom of the background, there is a section titled "Search Funding Results" with some text that is partially obscured.

- Name the search something that will remind you of its main search terms/parameters
- If you leave the box checked, you will receive a weekly email containing new and updated opportunities from this query.
- That email is a digest email: You can create multiple Saved Searches, and still only receive one weekly email.



# Managing Saved Searches

UCDAVIS UNIVERSITY OF CALIFORNIA

Funding opportunities powered by pivot

16 Announcements Megan Sparling ▾ HELP

Home Funding Profiles Papers Invited Admin

Funding ▾ Search

Active

Tracked 8

**Saved Searches 7**

Shared

Received

Advisor 129

Curated 34

Internal 6

Saved Searches (7)	New Results for Mar 17 2019 ⓘ	All Results ⓘ	Email alerts
Advisor Alert	3 / 0	129 / 3	Options ▾
Early Career	93 / 5	4212 / 123	Options ▾
High amount funding opps	35 / 7	678 / 89	Options ▾
Humanities	10 / 1	454 / 22	Options ▾
Limited Submissions	9 / 9	10 / 10	Options ▾
Social Sciences	25 / 6	536 / 59	Options ▾
<b>Sustainable Ag Research</b>	0 / 0	22 / 1	Options ▾

- You can find your Saved Searches under the Home Button Icon



# Managing Saved Searches

The screenshot shows the ProQuest Pivot interface. At the top is a navigation bar with tabs: Home, Funding, Profiles, Papers Invited, and Admin. A search bar is on the right. On the left is a sidebar with filters: Active, Tracked (8), Saved Searches (7), Shared, Received, Advisor (129), Curated (34), and Internal (6). The main area displays 'Saved Searches (7)' with columns for search names, 'New Results for Mar 17 2019', 'All Results', and 'Email alerts'. The searches listed are: Advisor Alert, Early Career, High amount funding opps, Humanities, Limited Submissions, Social Sciences, and Sustainable Ag Research. An 'Options' dropdown menu is open for the 'Sustainable Ag Research' search, showing options: Share, Publish as Curated Search, Edit, Add Tags, View archived results, Alert email off, and Delete this search.

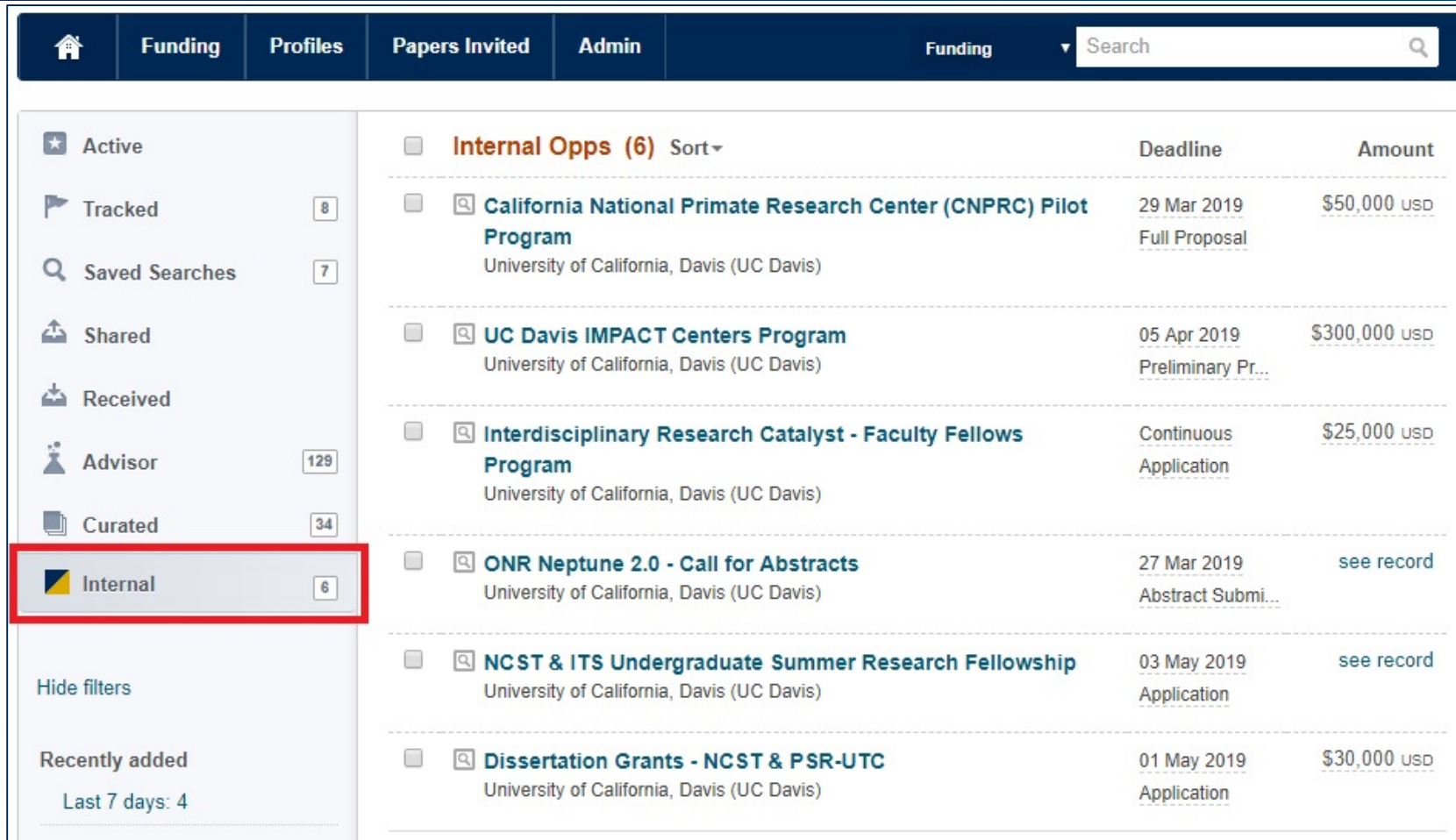
Search Name	New Results for Mar 17 2019	All Results	Email alerts
Advisor Alert	3 / 0	129 / 3	Options
Early Career	93 / 5	4212 / 123	Options
High amount funding opps	35 / 7	678 / 89	Options
Humanities	10 / 1	454 / 22	Options
Limited Submissions	9 / 9	10 / 10	Options
Social Sciences	25 / 6	536 / 59	Options
Sustainable Ag Research	0 / 0	22 / 1	Options

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- When you click “Options” next to your Saved Search, this is where you can share your search with someone else, edit your search’s search terms/parameters, view archived results for up to three weeks, turn the email alert off, or delete the search
- (Note: A couple options displayed at left may not display for you, as they are administrative options.)

# Internal Funding Opportunities



The screenshot displays the Pivot database interface for internal funding opportunities. The left sidebar contains filters: Active, Tracked (8), Saved Searches (7), Shared, Received, Advisor (129), Curated (34), and Internal (6), which is highlighted with a red box. Below the filters are options to 'Hide filters' and 'Recently added' (Last 7 days: 4). The main content area shows a table of internal opportunities under the heading 'Internal Opps (6) Sort'. The table has columns for checkboxes, titles, locations, deadlines, and amounts.

		Deadline	Amount
<input type="checkbox"/>	<b>California National Primate Research Center (CNPRC) Pilot Program</b> University of California, Davis (UC Davis)	29 Mar 2019 Full Proposal	\$50,000 USD
<input type="checkbox"/>	<b>UC Davis IMPACT Centers Program</b> University of California, Davis (UC Davis)	05 Apr 2019 Preliminary Pr...	\$300,000 USD
<input type="checkbox"/>	<b>Interdisciplinary Research Catalyst - Faculty Fellows Program</b> University of California, Davis (UC Davis)	Continuous Application	\$25,000 USD
<input type="checkbox"/>	<b>ONR Neptune 2.0 - Call for Abstracts</b> University of California, Davis (UC Davis)	27 Mar 2019 Abstract Submi...	see record
<input type="checkbox"/>	<b>NCST &amp; ITS Undergraduate Summer Research Fellowship</b> University of California, Davis (UC Davis)	03 May 2019 Application	see record
<input type="checkbox"/>	<b>Dissertation Grants - NCST &amp; PSR-UTC</b> University of California, Davis (UC Davis)	01 May 2019 Application	\$30,000 USD

- We now have the ability to add internal funding opportunities to the Pivot database.
- If you would like to add your campus unit's internal funding opportunity to Pivot, please contact [Meg Sparling](#)

# Still Have Questions?

If you still have questions related to the Pivot database, please reach out!

Meg Sparling

Funding Opportunities Coordinator

[msparling@ucdavis.edu](mailto:msparling@ucdavis.edu)