Pivot Quick Start Guide

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Creating an Account

[Image showing a webpage with options to log in or sign up for an account.]
Creating an Account

- Fill out the Account Information Page
- 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
Using the Funding Tab

• 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

- 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.
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.
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.
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.
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

• 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

- 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.
Running an Advanced Search

- 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.
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

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

• 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

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

- 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.)
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!

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