

Pivot Quick Start Guide

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Creating an Account

The screenshot shows a web browser window with the URL <https://pivot.proquest.com/> in the address bar. The page header features the UC Davis logo and the text "Funding opportunities powered by pivot". 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 an arrow. Below the header is a dark navigation bar with a home icon, "Funding", "Profiles", "Papers Invited", and a search bar. The main content area includes a sidebar with categories like "Most Popular" (10), "Editor's Pick" (4), "Health Science Funding News" (4), "Humanities and Social Science Funding News" (4), and "Internal Opps" (2). The main content area has search options: "Search by text", "Search by sponsor", and "Search by keyword". A search bar contains the text "Search funding opportunities" and a "Search Pivot" button. Below the search bar, there is a "View Tutorial" link and a section titled "Funding Discovery" with a brief description of the service.

Creating an Account

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

Institution Email

Password

Re-enter password

Affiliated Member Institution

I consent to the collection and use of my personal information consistent with the [Privacy Policy](#) and I acknowledge that use of the service is subject to the [Terms & Conditions](#). Without your consent, we can not create an account.

[Information about managing personal data in Pivot](#)

- 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

The screenshot shows the UC Davis Pivot website interface. At the top left is the UC Davis logo. To its right, it says "Funding opportunities powered by pivot". In the top right corner, there are links for "Announcements", a user profile for "Megan Sparling", and a "HELP" button. Below this is a dark navigation bar with tabs: "Home", "Funding" (highlighted with a red box), "Profiles", "Papers Invited", and "Admin". To the right of these tabs is a search bar with the text "Funding" and a search icon. Below the navigation bar is a "Funding Discovery" section. On the left side of this section is a sidebar with categories: "Most Popular" (10), "Editor's Pick" (4), "Health Science Funding News" (4), "Humanities and Social Science Funding News" (4), and "Internal Opps" (2). The main content area has search options: "Search by text", "Search by sponsor", and "Search by keyword". There is a search input field with the placeholder "Search funding opportunities", a "Search Pivot" button, and a "View Tutorial" link. Below the search options is a "Funding Discovery" heading followed by a paragraph: "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." Below this is a "Browse by Keyword" section with a "Take a Tour" link and a descriptive sentence: "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." At the bottom of the page is a colorful sunburst chart.

- 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

The screenshot shows the UC Davis Pivot website interface. At the top left is the UC Davis logo. To its right, it says 'Funding opportunities powered by pivot'. In the top right, there are links for 'Announcements', 'Megan Sparling', and 'HELP'. Below this is a dark navigation bar with tabs for 'Home', 'Funding', 'Profiles', 'Papers Invited', and 'Admin'. The 'Funding' tab is selected. To the right of the navigation bar is a search bar with the text 'Search' and a magnifying glass icon, which is crossed out with a red X. Below the navigation bar, there are three search options: 'Search by text', 'Search by sponsor', and 'Search by keyword'. The 'Search by text' option is selected and crossed out with a red X. Below these options is a search input field with the placeholder text 'Search funding opportunities', a 'Search Pivot' button, and a 'View Tutorial' link. Below the search bar, there is a 'Funding Discovery' section. It includes a 'Browse by Keyword' section with a 'Take a Tour' link and a descriptive paragraph. At the bottom of the page, there is a colorful sunburst chart.

- 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 screenshot shows the UC Davis Pivot Funding Discovery website. At the top left is the UC Davis logo. To its right, it says 'Funding opportunities powered by pivot'. Below this is a navigation bar with 'Funding', 'Profiles', 'Papers Invited', and 'Admin' tabs. A search bar is located in the top right of the navigation bar. Below the navigation bar, there are three search options: 'Search by text', 'Search by sponsor', and 'Search by keyword'. The 'Search by text' option is selected. Below this, there is a search input field with a 'Search Pivot' button. The 'Advanced Search' link is highlighted with a red box. Below the search bar, there is a 'Funding Discovery' section with a description and a 'Browse by Keyword' section with a 'Take a Tour' link. At the bottom of the page, there is a colorful sunburst chart.

- 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.

Advanced Search: Categories



Find Opportunities matching

Match all of the fields Match any of the fields *i*

All Fields ▾ or or

i and All Fields ▾ or or

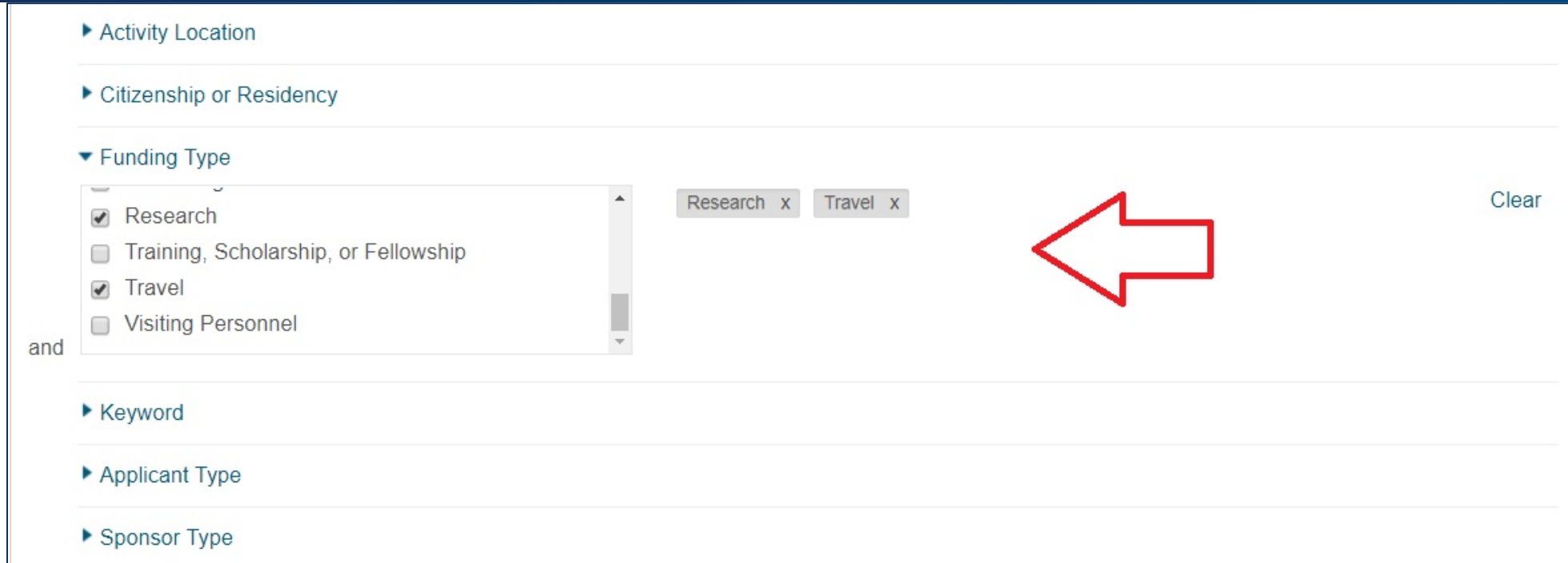
and All Fields ▾ or or

[+ Add another row](#)

- ▶ Amount
- ▶ Deadlines
- ▶ Limited Submission
- ▶ Activity Location
- ▶ Citizenship or Residency
- ▶ Funding Type
- ▶ Keyword
- ▶ Applicant Type
- ▶ Sponsor Type

- 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.

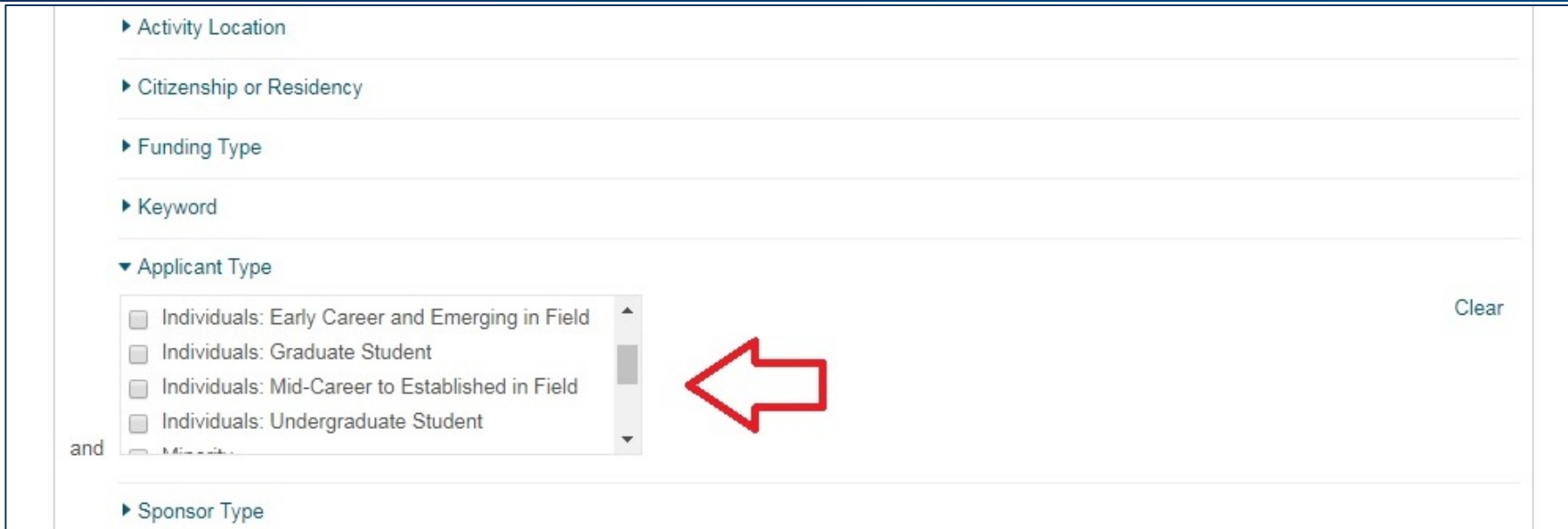
Advanced Search: Funding Type



The screenshot shows a search interface with several expandable sections. The 'Funding Type' section is expanded, showing a list of options: Research (checked), Training, Scholarship, or Fellowship (unchecked), Travel (checked), and Visiting Personnel (unchecked). To the right of the list, there are two gray buttons labeled 'Research x' and 'Travel x'. A red arrow points from these buttons towards the right. Below the list, the word 'and' is visible. To the right of the 'Funding Type' section, there is a 'Clear' button. Other sections include 'Activity Location', 'Citizenship or Residency', 'Keyword', 'Applicant Type', and 'Sponsor Type', all of which are currently collapsed.

- 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.

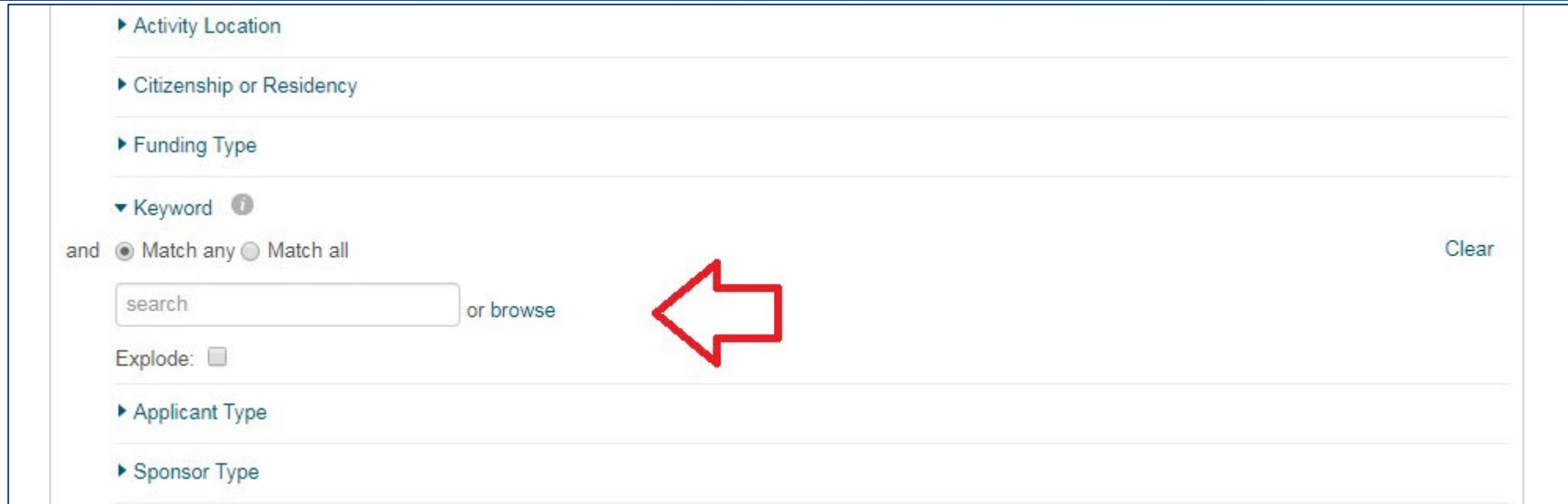
Advanced Search: Applicant Type



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' dropdown is expanded, showing four options: 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 dropdown menu. A 'Clear' button is visible to the right of the dropdown.

- 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.

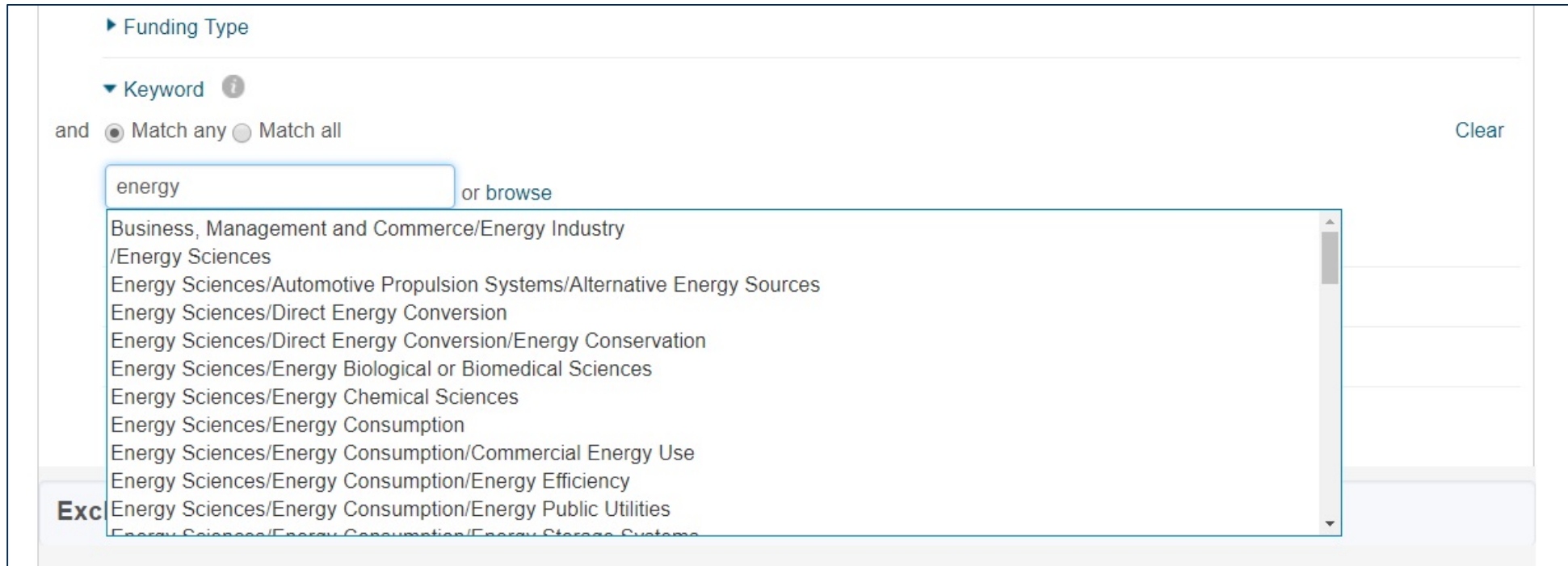
Advanced Search: Keyword



The screenshot shows a search interface with several expandable categories: Activity Location, Citizenship or Residency, Funding Type, Keyword (expanded), Applicant Type, and Sponsor Type. The Keyword section is active, showing options for 'Match any' (selected) and 'Match all', a search input field containing the text 'search', and a 'Clear' button. A red arrow points to the search input field.

- 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:

- A "Funding Type" dropdown menu.
- A "Keyword" dropdown menu with an information icon.
- Radio buttons for "Match any" (selected) and "Match all".
- A "Clear" button.
- A text input field containing "energy" and a "or browse" link.
- A dropdown menu listing various keyword folders, including:
 - 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 ⓘ

Search Clear All

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:

Clear

Clear

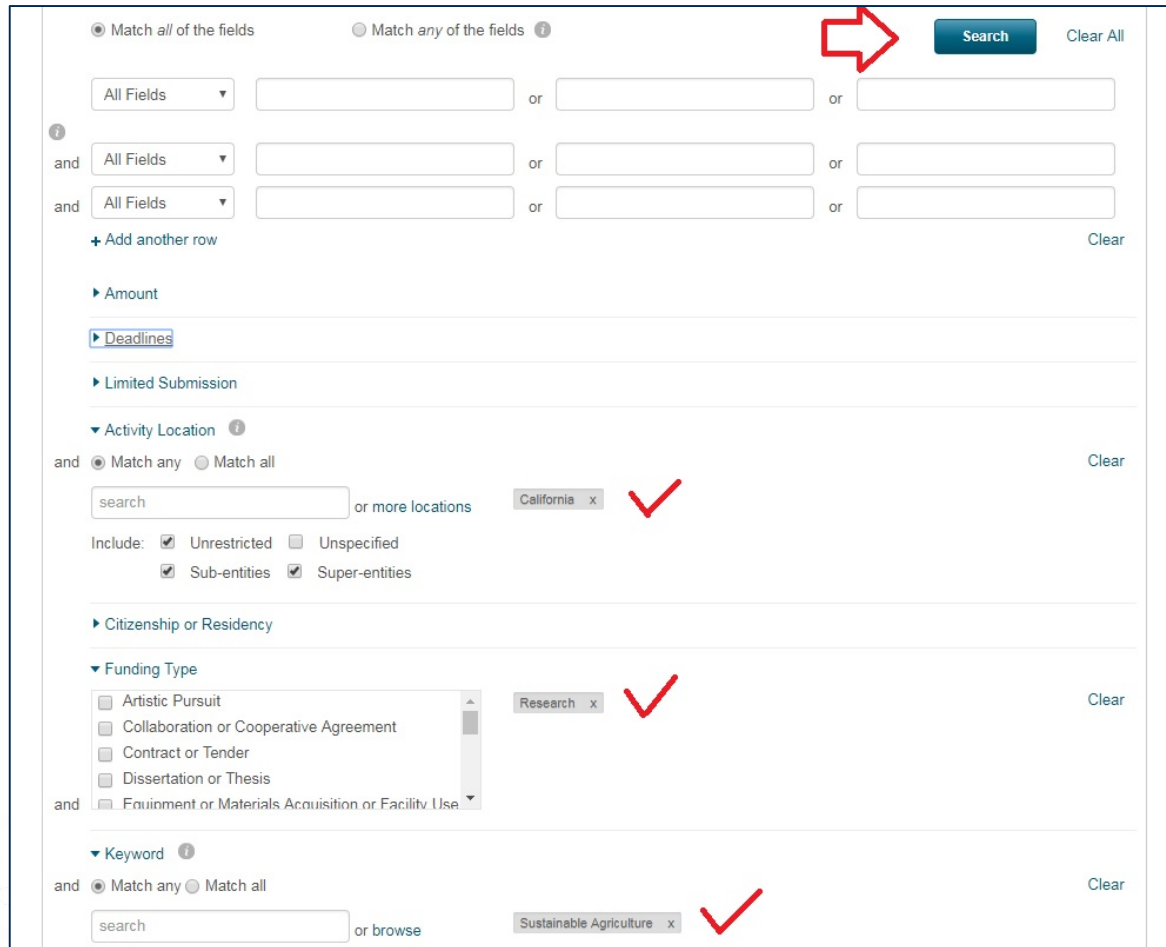
Clear

Close

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



The screenshot shows an advanced search interface with the following elements:

- Match criteria: Match all of the fields, Match any of the fields (with an information icon).
- Search button: A blue button labeled "Search" with a red arrow pointing to it.
- Clear All button: A text link labeled "Clear All".
- Field selection: Three rows of "All Fields" dropdown menus, each followed by an "or" separator and an empty input field.
- Buttons: "+ Add another row" and "Clear" (next to the field selection).
- Amount: A collapsed section labeled "Amount".
- Deadlines: A collapsed section labeled "Deadlines".
- Limited Submission: A collapsed section labeled "Limited Submission".
- Activity Location: A collapsed section with "Match any" selected and "Match all" unselected. It includes a search input, a "California" tag with a red checkmark, and checkboxes for "Unrestricted", "Unspecified", "Sub-entities", and "Super-entities".
- Citizenship or Residency: A collapsed section.
- Funding Type: A collapsed section with a list of options: "Artistic Pursuit", "Collaboration or Cooperative Agreement", "Contract or Tender", "Dissertation or Thesis", and "Equipment or Materials Acquisition or Facility Use". A "Research" tag with a red checkmark is visible.
- Keyword: A collapsed section with "Match any" selected and "Match all" unselected. It includes a search input, a "Sustainable Agriculture" tag with a red checkmark, and an "or browse" option.

- 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

<input type="checkbox"/>	19 Results Sort ▾	Deadline	Amount
<input type="checkbox"/>	BCFN Yes! Young Earth Solutions Research Grant Barilla Center for Food and Nutrition (BCFN)	14 Jun 2019 Proposals Anticipated	€20,000 EUR
<input type="checkbox"/>	Professional + Producer Grants (PPG) 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"/>	Western SARE Graduate Student Grants in Sustainable Agriculture 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"/>	Research Grants Ekhagastiftelsen (Ekhaga Foundation)	20 May 2019 Application Anticipated	see record
<input type="checkbox"/>	Olam Prize for Innovation in Food Security Agropolis Fondation	28 Feb 2019 Proposals Confirmed	\$75,000 USD
<input type="checkbox"/>	Farmer/Rancher Grants 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"/>	Western SARE Research and Education Grant 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

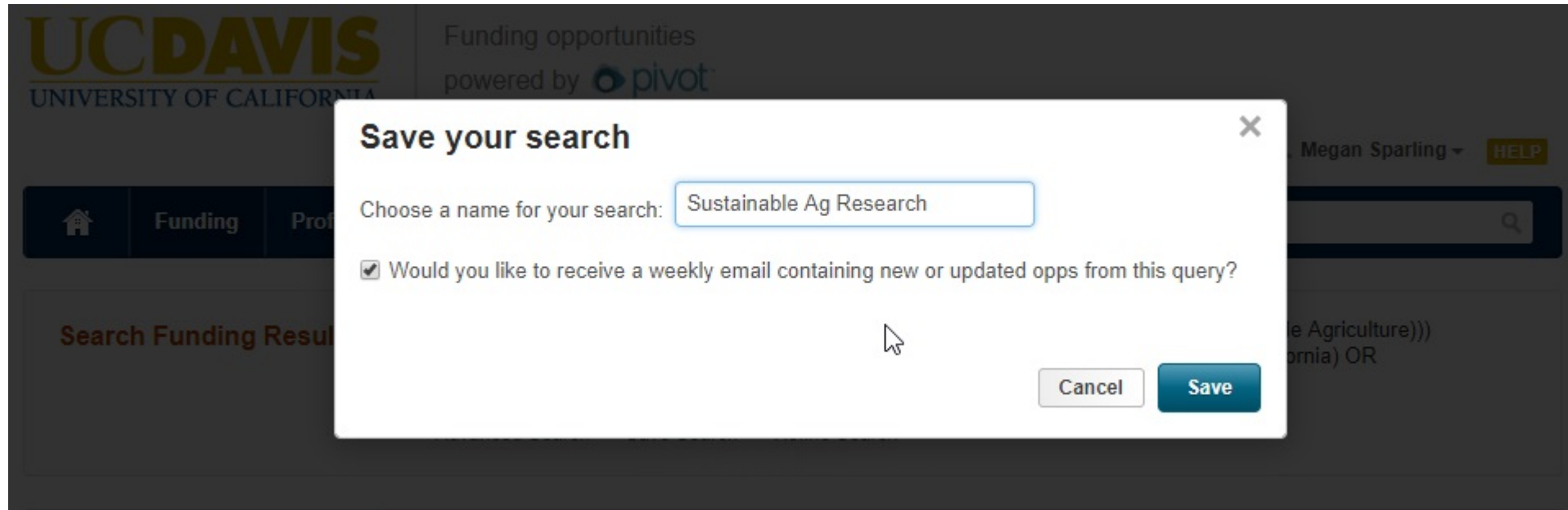
Top sponsor types
Federal, U.S.: 10
Other Nonprofit: 5
Professional Society o...: 3
Multinational Organiza...: 2
Private Foundation: 1

22 Results Sort ▾

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



- 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

The screenshot shows the UC Davis Pivot website interface. The top navigation bar includes the UC Davis logo, the text 'Funding opportunities powered by pivot', and user information for Megan Sparling with 16 announcements. A secondary navigation bar contains icons for Home, Funding, Profiles, Papers Invited, and Admin, along with a search bar. A left sidebar lists various search filters: Active, Tracked (8), Saved Searches (7), Shared, Received, Advisor (129), Curated (34), and Internal (6). The main content area displays a table of 'Saved Searches (7)' with columns for search names, 'New Results for Mar 17 2019', 'All Results', and 'Email alerts'. The 'Sustainable Ag Research' search is highlighted with a red box.

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
Sustainable Ag Research	0 / 0	22 / 1	Options

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

Managing Saved Searches

The screenshot displays the ProQuest interface for managing saved searches. The top navigation bar includes links for Home, Funding, Profiles, Papers Invited, and Admin, along with a search bar. A left sidebar lists various search categories: Active, Tracked (8), Saved Searches (7), Shared, Received, Advisor (129), Curated (34), and Internal (6). The main content area shows a table of saved searches with columns for the search name, new results for Mar 17 2019, all results, and email alerts. An 'Options' dropdown menu is open for the 'Sustainable Ag Research' search, listing actions such as 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

- Share
- Publish as Curated Search
- Edit
- Add Tags
- View archived results
- Alert email off
- Delete this search

- 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 shows a Pivot database interface with a navigation bar at the top containing 'Funding', 'Profiles', 'Papers Invited', and 'Admin'. A search bar is on the right. On the left, a sidebar lists 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 is a 'Recently added' section for the last 7 days with 4 items.

<input type="checkbox"/>	Internal Opps (6) Sort ▾	Deadline	Amount
<input type="checkbox"/>	California National Primate Research Center (CNPRC) Pilot Program University of California, Davis (UC Davis)	29 Mar 2019 Full Proposal	\$50,000 USD
<input type="checkbox"/>	UC Davis IMPACT Centers Program University of California, Davis (UC Davis)	05 Apr 2019 Preliminary Pr...	\$300,000 USD
<input type="checkbox"/>	Interdisciplinary Research Catalyst - Faculty Fellows Program University of California, Davis (UC Davis)	Continuous Application	\$25,000 USD
<input type="checkbox"/>	ONR Neptune 2.0 - Call for Abstracts University of California, Davis (UC Davis)	27 Mar 2019 Abstract Submi...	see record
<input type="checkbox"/>	NCST & ITS Undergraduate Summer Research Fellowship University of California, Davis (UC Davis)	03 May 2019 Application	see record
<input type="checkbox"/>	Dissertation Grants - NCST & PSR-UTC 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

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