



About Pivot®

Pivot is a database containing funding opportunities for all disciplines and project types. It includes information on federal, private, and international funding options all in one easy to search tool. **With your personal Pivot account**, you can:

- Sign up to receive customized funding alerts
- Save and return to previous funding searches
- Share funding opportunities directly from Pivot
- Track individual funding opportunities

Where to Begin

Access Pivot here: <https://pivot.proquest.com/>

- To create an account, click on *Sign Up* in the upper right corner of the screen
- Fill in all required fields
- Use your institutional-assigned email address (this will be your User ID)

To activate your account, wait for an email from Pivot: remember to check your spam folder if you do not see the email in your inbox

Starting a Basic Search

Under the *Funding* tab, you will see the main search box where you can enter free text search terms, or, search by Sponsor or Keywords. It can be a good idea to start with keywords which are pre-defined terms that Pivot editors match to funding opportunities.

By hovering over the **Browse by Keyword** wheel you can see approximately how much funding is available for a given term. Selecting a term from the wheel will return results for all the funding opportunities matching that term.

When running **free-text searches** from the main search box, you can get more precise results by:

- Using quotes for an exact phrase search (example, "childhood obesity" returns results that have that exact phrase)
- Using an asterisk to search word variants (example, using child* returns results with the terms child, childhood, children, etc.)
- Using proximity limiters (example, using childhood w/5 obesity returns results where both terms are within 5 words of each other)

The **Search by Keyword** feature allows you to easily find keywords that align with your research interests and quickly build a query that searches one or more keywords.

Tip: if you start with **broad keywords** first, then you can always narrow your results on the results screen or refine your query by adding more specific terms based on the results you receive

The **Search by Sponsor** feature allows you to search for specific sponsors and funding agencies, or, you can browse an A-to-Z list of all the sponsors that Pivot is tracking. Just click on a sponsor name to see all of the active funding opportunities for that sponsor in Pivot.

Performing an Advanced Search

On the *Funding* tab, click on *Advanced Search*. You will see a variety of options for searching specific fields and for pre-scoping your search by specific criteria including by:

- Funding type
- Sponsor type
- Award amounts
- Upcoming deadline
- Applicant type

There are also two other important parameters related to eligibility:

- *Activity location* – specifies where the research or activity must take place. As you type Pivot will auto-populate locations or you can browse from a list.
- *Citizenship* – specifies any citizenship requirements or restrictions

Note: These filters may already be applied by default by our institution's Pivot administrators. If this is the case, you can toggle off or modify these limiters.

Search Tip: Some research topics may not get any results in searching, **but that does not necessarily mean there are no grants for which your project may be eligible.** If this happens, try searching for grants in the broader field(s) within which your project falls. *For example*, a project to study zebra mussels may be eligible under a grant looking to fund projects in the broader fields of Biological Sciences, Marine Biology, or Environmental Biology, etc.



Pivot offers multiple ways to save searches, track results and get automatic alerts for funding of interest.

Saving or Modifying a Search

After initiating your search, three links appear on the top of your search results screen: *Advanced Search*, *Save Search*, and *Refine Search*.

- *Advanced Search* starts a new, blank search screen.
- *Save Search* allows you to name and save your search. On the Saved Searches screen, you can specify whether you want to receive weekly funding alert emails that highlight any new opportunities that match your search criteria.
 - You can find and manage your saved searches by clicking on the 'home' icon in the top left corner of the screen.
- *Refine Search* returns you to the search screen with your criteria still entered so you can easily add or modify keywords or search parameters.

You may also narrow your results using the faceted search results on the left side of the search results screen

Tracking and Sharing Funding Opportunities

After initiating your search, three links appear on the top of your search; Track, Set to Active & Share. You can save and share an unlimited number of opportunities.

- Your tracked list will be a longer list of opportunities that you still wish to keep track of.
- Your active list will be a shorter list of your very important opportunities or those you are definitely planning to apply for
- Sharing an opportunity is easy. Enter the name or the email address of the person(s) that you wish to share this opportunity or search with. Pivot will attempt to

Questions and Trainings

If you encounter a technical issue using Pivot, please contact McQuade Library at mcquade@merrimack.edu

If you need help or have questions about an opportunity you've found in Pivot, please contact Sponsored Programs at research@merrimack.edu

Note: Pivot provides key resources and helpful, short tutorial videos!

Detailed documentation and other resources

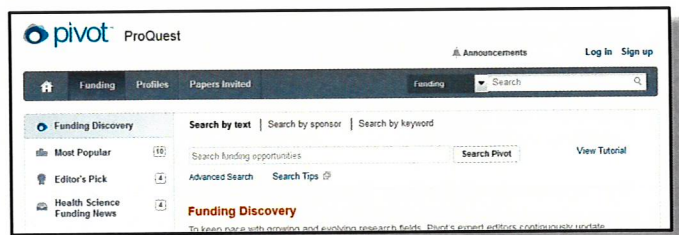
<https://knowledge.exlibrisgroup.com/Pivot>

Pivot tutorial videos can be found on YouTube:

<https://www.youtube.com/user/ProQuestPivot>

McQuade's Pivot Guide:

<http://libguides.merrimack.edu/pivot>



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Pivot At-A-Glance: A Funding Search User Guide

Because of its easy user interface, tracking features, and hit success, Pivot should be your primary funding search tool.

Create a Pivot Account	To register for an account with Pivot, go to http://pivot.proquest.com or find Pivot on McQuade Library's Databases page. Access to Pivot will be gained by indicating yourself as member of Merrimack College and by using a Merrimack email address as your login name. An email with a validation link will be sent to confirm Pivot registration. Once the link is validated, access will be granted.
Basic and Advanced Searches	Pivot offers both simple and advanced searches. Basic searches triggered by a single search term provide a breadth of funding opportunities. Advanced searches yield the most relevant and detailed results. A detailed explanation of the Advanced Search follows this guide.
Results Review	Once you have conducted an Advanced Search, you can review your search results. Always read Pivot's synopses and program overviews carefully. Additionally, always verify the program information on the sponsor's website, and check the sponsor's site again before you apply.
Tag, Track, and Share	<p>You can track funding opportunities, and manage your tracked opportunities, in the Pivot dashboard. You can track any funding opportunity from the synopsis page by clicking the "track" text in the upper right hand corner.</p> <p>You can organize all your tracked opportunities from your home page. On this page, you can add tags to your opportunities; you can also add deadlines to a synched calendar, set email alerts, share opportunities with colleagues, and more.</p>
Contact Sponsored Programs	Once you've decided to apply for a program you've found on Pivot, you should be in contact with Deborah Esparza-St Louis at esparzastlod@merrimack.edu for federal/state funding and Lauren Carr at carrl@merrimack.edu for foundation funding. Advanced notice means that we can share information we have about that sponsor, assist with the application process, strategize with you, and even help you identify more potential sponsors for your research.

Pivot Help:

<http://libguides.merrimack.edu/pivot>

Pivot Advanced Search Guide

Advanced Search enables you to set search parameters for funding opportunities. Filling in as many fields as possible generates more targeted and relevant search results.

1. **Keyword Grid:** This field lets you type in search terms and keywords.
 - a. In the keywords table, fill in synonymous keywords horizontally along the boxes, and add different disciplines or research terms vertically.
 - b. Above the keyword table are two options: “match all of the fields” or “match any of the fields.” Use “match all of the fields.”
2. **Amount:** This field lets you specify award amounts and set amount ranges. For general searches, leave this blank. For a specific project—or a project in a specific location—do one search having filled out this section, and one with a blank section.
3. **Deadlines:** This field lets you specify deadlines and deadline ranges for proposal submission to sponsors.
 - a. Always check both the “Optional Deadlines” and “Continuous or Undefined Deadlines” boxes. This ensures that programs with rolling deadlines will be included in your search.
4. **Limited Submission:** This field lets you include limited submissions in your search. Checking this box means that Pivot will only search for limited submission programs, which are programs that cap the number of applications that can come from a particular institution. Leave this section blank, unless otherwise specified.
5. **Activity Location:** This field lets you designate where the research activity will take place. For “activity location” put Massachusetts as the location. This does not mean you will only get awards that relate to in-state activities, but that the searches will exclude awards that require the work be conducted in specific locations.
 - a. Always check “Unrestricted” and “Unspecified.”
7. **Citizenship or Residency:** This field lets you designate the citizenship or residency of your researchers. Filling out this section is only necessary if you are specifically looking for funding for a PI of a certain nationality or in a certain area of the world. For general searches, leave this blank.
8. **Funding Type:** This field asks searcher to identify what kinds of activities the award money will go to. Most often, the only box you will need to check is “Research.”
9. **Keyword:** This field lets you add a keyword to your search. It is redundant if you’ve filled out the search term section properly.
10. **Applicant Type:** This field lets you specify the eligibility requirements of searchable funding organizations. The four main boxes to check are: “Academic Institution,” “Nonprofit,” “New Faculty/New Investigator,” and “Ph.D./M.D./Other Professional.”
11. **Sponsor Type:** This field lets you designate the type of sponsor you want to search for. Only use this section if you have constraints on your project that make it necessary to restrict your search to certain organizations.
12. **Exclude Search:** This field lets you add terms you want to exclude from search results. Only use the exclude search feature if you know with certainty that you want to exclude something specific.

Pivot Help:

<http://libguides.merrimack.edu/pivot>