

Pivot-RP Funding Database

Sharing Funding Opportunities as an Administrator

DCU Pivot-RP home page: <https://www.dcu.ie/researchsupport/pivot-rp>

HOW ADMINISTRATORS CAN SHARE FUNDING OPPORTUNITIES

1. Share a Search
2. Share Opportunities
3. Create a Newsletter
4. Create an Embedded Search
5. Create a Search Widget

INTRODUCTION TO SHARING FUNDING OPPORTUNITIES AS AN ADMINISTRATOR

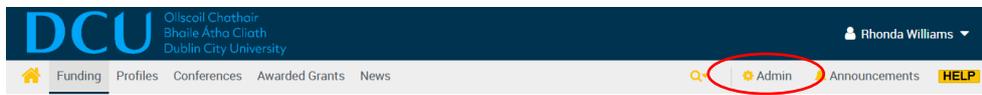
Funding opportunities can be shared with individuals; however, if you are sharing consistently with a group of people – whether it is a Centre, School, or Faculty – then it is useful to create a Group.

Groups can be used to share funding opportunities and Newsletters.

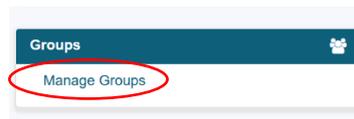
- If a *Personal Group* is created, the responsibility of managing membership lies with the creator.
- If a *Public Group* is created, it is visible to anyone in DCU, and anyone can join it.

How to set up a Group:

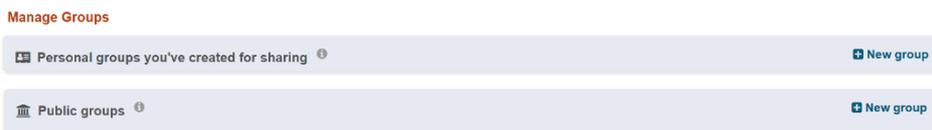
- a. Go to the Admin tab at top of page



- b. Click on “Manage groups”



- c. Click on “New Group” at the right side of either Personal or Public Groups. If Personal is chosen, no one can join the group except those who are invited. If Public is chosen, anyone in DCU can join it.



- d. Add title / description / names or emails, and tick “Make group public” if applicable
- e. Submit

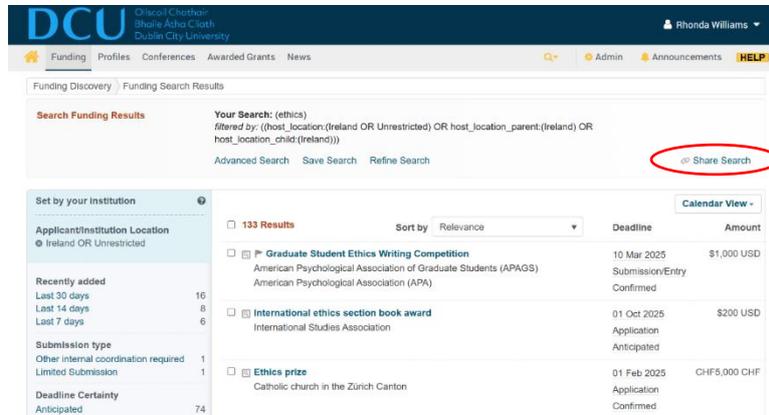
A screenshot of the 'Add a New Group' form. It contains a text input for the group name (90 characters left), a rich text editor for the description (0 of 1600 characters), a checked checkbox for 'Make group public', and a text input for adding people (names or email addresses). There are also 'Cancel' and 'Submit' buttons at the bottom right.

HOW TO SHARE FUNDING OPPORTUNITIES AS AN ADMINISTRATOR

1. Share a Search

Once you have created a funding search, you can share it by using the “Share Search” button.

- Go to Funding tab
- In the “Search All Fields” tab, enter a search term in the box and click on the magnifying glass (See [Quick Start Guide](#) on the Pivot-RP home page for help with searching)
- Filter and sort list of results as needed
- Click on “Share Search”



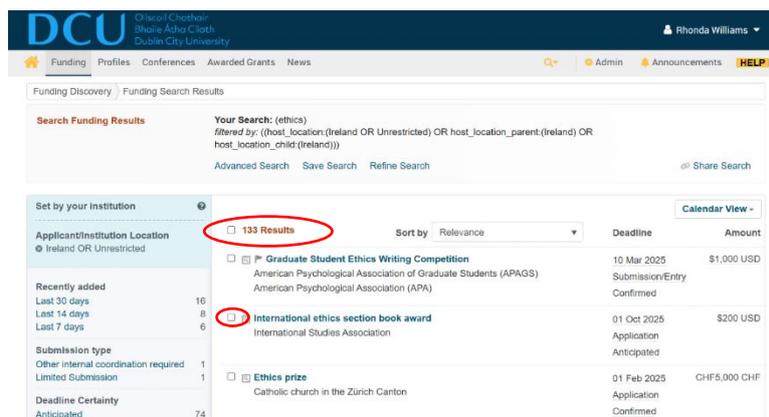
The screenshot shows the DCU Pivot-RP interface. At the top, there's a navigation bar with 'Funding' selected. Below it, the search results for 'ethics' are displayed. A 'Share Search' button is circled in red. The results table shows three items: 'Graduate Student Ethics Writing Competition', 'International ethics section book award', and 'Ethics prize'. The 'Share Search' button is located to the right of the search filters.

- Choose a group you already created, create a new one, or send to specific individuals
- Add a message (optional) and click “Let each recipient see who else received this” (optional)
- Click “Send”
- You will receive an email that lists each recipient and confirms if the email was sent successfully.
- Recipients will receive an email where they will be provided a link to view the results. They will need to log into Pivot-RP to Save the Search to their own profile. Once saved, it can be refreshed at any stage to see new opportunities.

2. Share Opportunities

Share the details of one or more funding opportunities directly with others by using the pop-up “Share” button.

- Go to Funding tab
- In the Search All Fields tab, enter a search term in the box and click on the magnifying glass (See [Quick Start Guide](#) on the Pivot-RP home page for help with searching)
- Tick the box at the top of the list to choose the full list of funding opportunities **or** click on individual funding opportunities to share



The screenshot shows the DCU Pivot-RP interface. The search results for 'ethics' are displayed. The '133 Results' checkbox and the 'International ethics section book award' checkbox are circled in red. The results table shows three items: 'Graduate Student Ethics Writing Competition', 'International ethics section book award', and 'Ethics prize'. The 'Share Search' button is located to the right of the search filters.

- Click the “Share” button that becomes available. (Note you can also “Export” the opportunity details to Word or a PDF if needed.)



- Choose a group you already created, create a new one, or send to specific individuals
- Add a message (optional)

- g. Click “Let each recipient see who else received this” (optional) and “Put shared opps on recipient’s tracked list” (optional)
- h. Click “Send”
- i. Recipients will receive an email where they will be provided a link to view the results. They will need to log into Pivot-RP to Track the opportunity.

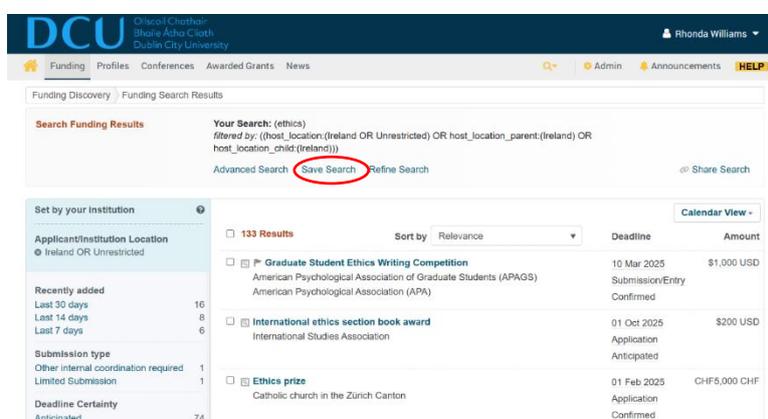
3. Newsletters

The Newsletter feature is an efficient way to regularly communicate funding opportunities with researchers. Newsletters can be created using Pivot-RP Curated Searches and Lists.

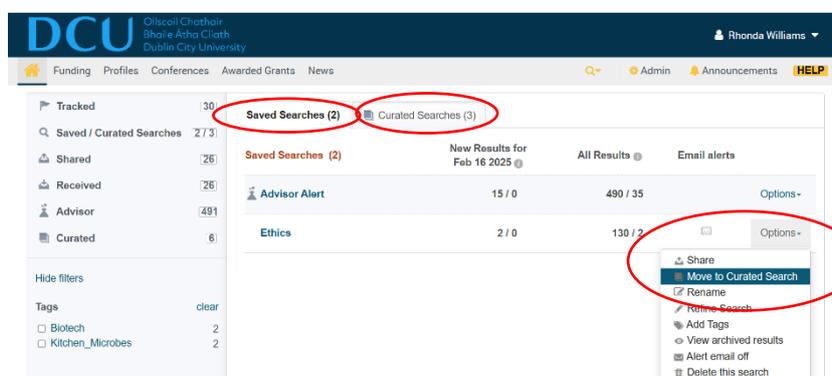
Note: You must first Save a Search or List of opportunities and then Curate them. Saved Searches are dynamic and will refresh each time the search is opened. Saved opportunities are static at that point in time.

3a. Newsletter Prep: Save and Curate a Search

- a. Go to Funding tab
- b. In the “Search All Fields” tab, enter a search term in the box and click on the magnifying (See [Quick Start Guide](#) on the Pivot-RP home page for help with searching)
- c. Filter and sort list of results as you wish
- d. Click “**Save Search**” at the top of the results list



- e. Enter a name for your search
- f. Tick the box if you wish to receive a weekly email containing new or updated opportunities from the query
- g. Click “Save”
- h. Hover over the Home button and select “Saved Searches”
- i. Find the search you saved and click on the “Options” drop-down menu on the right-hand side
- j. Click “**Move to Curated Search**” and confirm “Yes”
- k. Click the “Curated Searches” tab to see your new Curated search

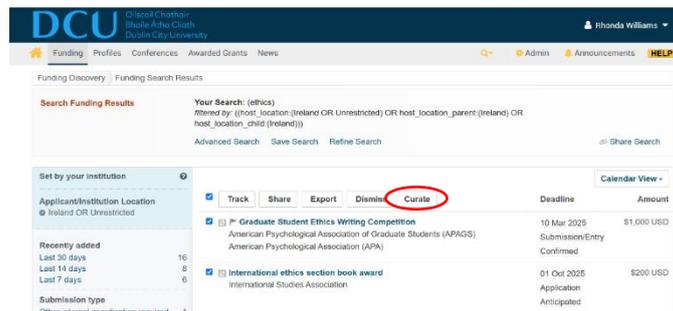


- l. This Curated Search is now ready to be used in a Newsletter
- m. Edit Curated Searches via the “Manage Curated Searches” link in the Admin Dashboard

3b. Newsletter Prep: Curate a List

A curated list is a saved list of specific funding opportunities.

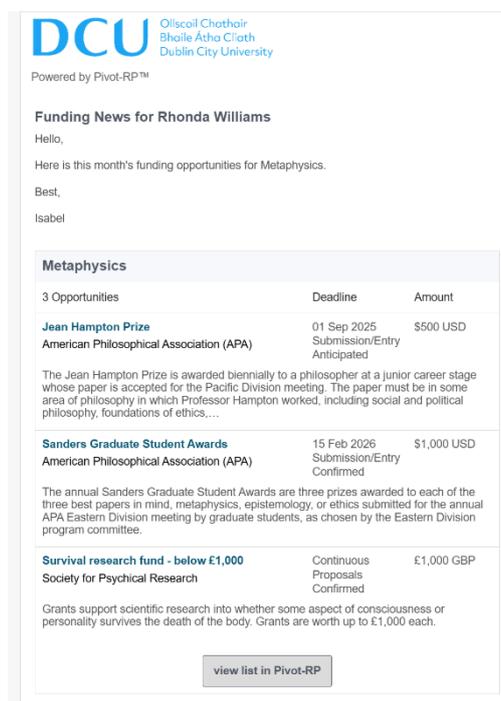
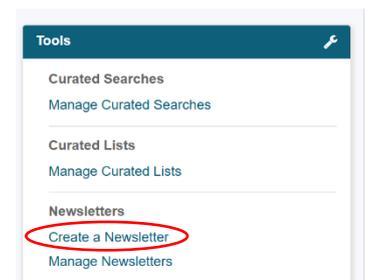
- Go to Funding tab
- In the “Search All Fields” tab, enter a search term in the box and click on the magnifying glass
- Click the box at the top of the list to choose the full list of funding opportunities or click individual funding opportunities to share
- Click the “Curate” button



- Search for or choose a list that has already been curated, or Click “Create New List”
- If creating a new list, enter a name for it
- Click “Create”
- Hover over the Home button and select “Curated Opps” to see your Curated Lists
- This Curated List is now ready to use in a Newsletter
- Edit Curated Lists at any time via the “Manage Curated Lists” link in the Admin Dashboard

3c. Create a Newsletter (using Groups and Curated Searches or Lists)

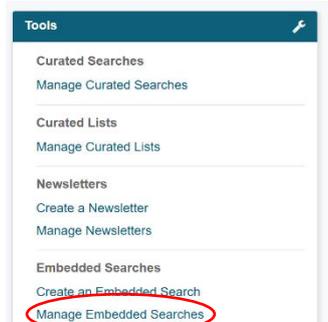
- Go to the Admin dashboard
- Click “Create a Newsletter”
- Enter a name for your newsletter
- Choose which curated lists or searches to share by clicking on the drop-down list
- Pick which sort order in which you would like the results displayed
- Add a Heading & Custom Message
- You can choose to send a Preview Email to your own mailbox by clicking the Send Preview Email button (**see example below**)
- Choose a Group of Recipients – if choosing “groups,” click “Add Group” and choose from the drop-down
- Schedule a time for distribution
- Add a Co-owner (optional, but highly recommended)
- Click the “Publish” button or “Save Draft” button
- When you Publish a Newsletter, an email is sent at the time you scheduled
- See example of a Newsletter below**
- View and edit Newsletters via the “Manage Newsletters” link in the Admin Dashboard



4. Create an Embedded Search for the Web

Funding opportunity details can be embedded directly into any webpage. The curated list or search can later be changed without changing the code itself.

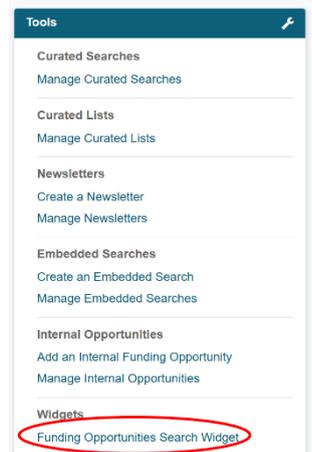
- a. Go to the Admin dashboard
- b. Click on **“Create an Embedded Search”**
- c. Name your embedded search, choose the funding opportunities you want to Share, pick the Sort Order for display, add a Co-Owner, and Save it
- d. You will receive an html code to embed the search into your website
- e. Contact researchsystems@dcu.ie for assistance in uploading the html code on your website



5. Create a Search Widget for the Web

You can create a widget to add to your website. The widget displays a search field that your site visitors can use to search Pivot-RP for funding opportunities. After they select “Search” in the widget, they are directed to a search results page on Pivot-RP.

- a. Go to the Admin dashboard
- b. Click on **“Funding Opportunities Search Widget”**
- c. Customize your search box
- d. Click on the “Create Widget” button to generate an html code
- e. Contact researchsystems@dcu.ie for assistance in uploading the html code onto your website
- f. An example of a widget is below and can be found on the [Pivot-RP home page](#)



Log in above, or enter a search term in the box below to be taken directly to the Pivot-RP Funding tab.

A screenshot of the Pivot-RP search widget. It features the Pivot-RP logo and tagline 'funding opportunities' in the top left. Below the logo is a search input field with a 'Search' button to its right.