

# PIVOT: Finding the Right Opportunities and Collaborators

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Molly McCarty, CRA, Director, Pre-Award Administration  
Kara Gregory, Pre-Award Grants Analyst  
Sponsored Projects Services

# Funding Opportunity Resources for Chapman Researchers

## COS Pivot

- Online, searchable database that includes federal, state, local, international, and private funding opportunities
- Searches by funding type, funding source, keywords, deadline dates, region, etc.
- Free to all Chapman faculty, staff and students when you register with your Chapman email account
- Create a profile outlining your research interests and receive email notifications about possible funding sources
- Find collaborators (internal and external) -- Searchable profiles including information about research interests and recent publications

<https://pivot.proquest.com>

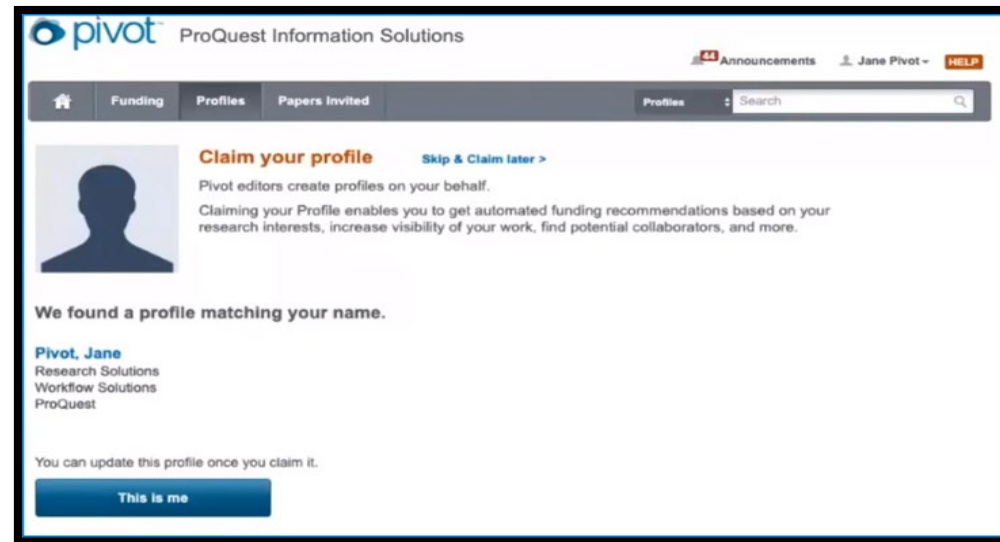
# How can PIVOT help you?

- Offers a variety of search functions
- Weekly Advisor Alerts: Receive funding opportunities customized for you via email.
- Link your ORCID account and let Pivot handle future updates for you.
- Connecting with Collaborators
- Direct Link to CayuseSP (internal approval system at Chapman)

# Get Started – Claim Your Profile

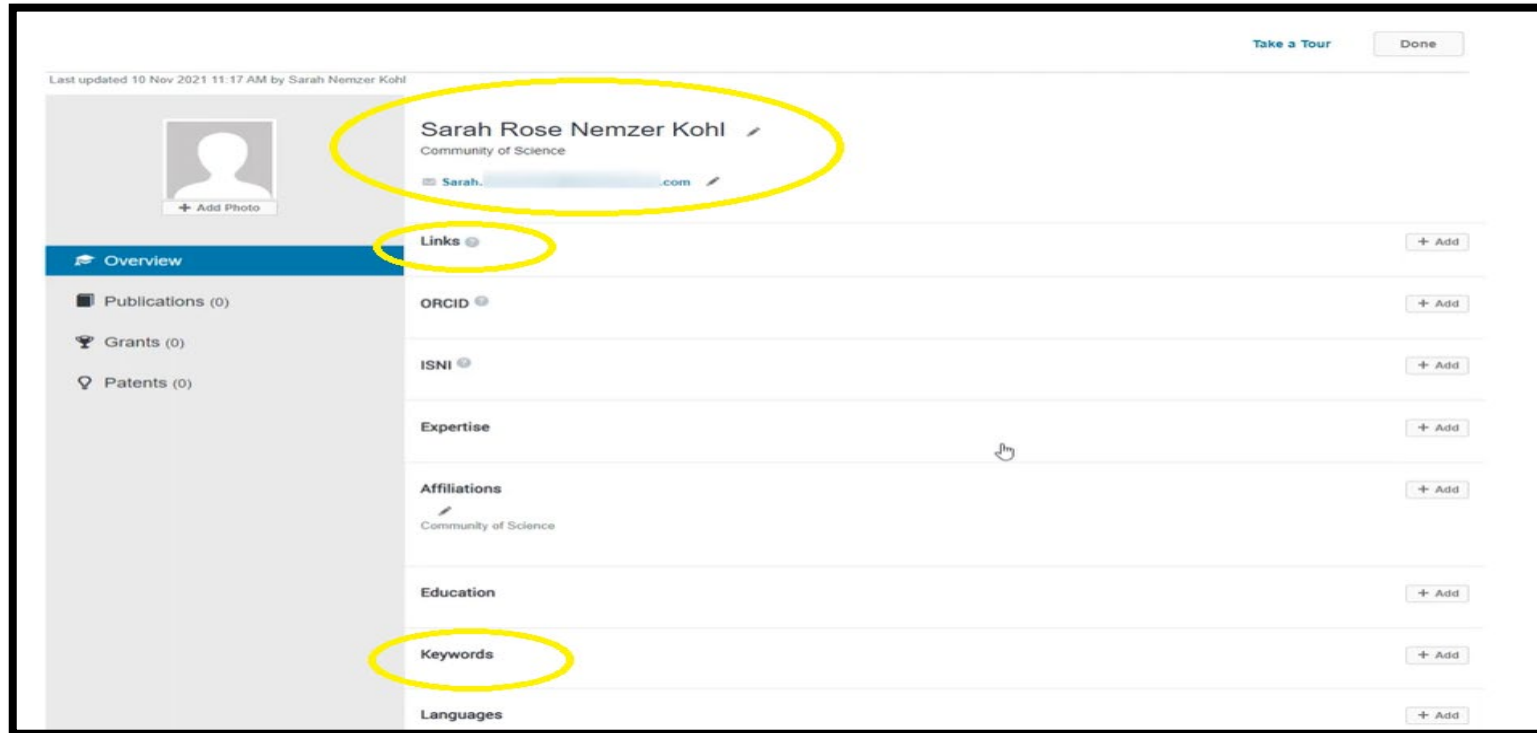
Pivot will prompt you to claim a profile when you log in.

Use your Chapman Login to set up your account.



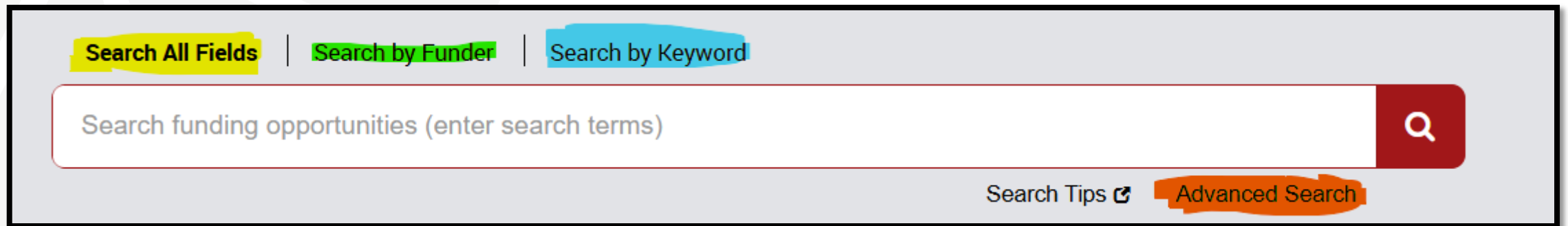
# Profile Tips

- Add middle or alternate names used for publication
- Links to sites such as your personal webpage or CV page
- Add ORCID
- Select keywords in your focus areas



# Ways to Search

- **Quick Search** – this is a wide-net way to search. The results will include anything that uses that term in any section of the opportunities.
- **Search by Funder** – Can select All, U.S., and Non-U.S.
- **Search by keywords** – key a few characters and a drop-down list will open with related search.
- **Advanced Search** – multiple options of categories to choose to narrow your search.



The screenshot shows a search interface with three navigation tabs at the top: "Search All Fields" (highlighted in yellow), "Search by Funder" (highlighted in green), and "Search by Keyword" (highlighted in blue). Below the tabs is a large white search bar with the placeholder text "Search funding opportunities (enter search terms)". To the right of the search bar is a red button with a white magnifying glass icon. At the bottom right of the interface, there is a link for "Search Tips" with an external link icon, and a button for "Advanced Search" (highlighted in orange).

# Saving Searches and E-mail Notifications

- Once on your search results page you can save your search for use later.

**Search Funding Results**

**Your Search:** (cat OR instincts)  
*filtered by:* ((host\_location:(United States OR Unrestricted) OR host\_location\_parent:(United States) OR host\_location\_child:(United States)))

[Advanced Search](#) [Save Search](#) [Refine Search](#) [Share Search](#)

- Pivot will ask you to name the search and give you the option to get a weekly e-mail with new or updated opportunities within your search parameters.

**Save your search**

Choose a name for your search:

Cat Instincts

☒ Would you like to receive a weekly email containing new or updated opps from this query?

[Cancel](#) [Save](#)



# Tracked Opps

- You can also track specific funding opportunities

From your Search  
Funding Results  
list

**Search Funding Results**

Your Search: (childhood AND obesity)  
filtered by: ((host\_location:(United States OR Unrestricted) OR host\_location\_parent:(United States) OR host\_location\_child:(United States)))

[Advanced Search](#) [Save Search](#) [Refine Search](#) [Share Search](#)

**Set by your institution** ⓘ

**Applicant/Institution Location**  
⊗ United States OR Unrestricted

**Recently added**  
Last 30 days 1

☐ **Track**     Calendar View ▾

	Deadline	Amount
<input checked="" type="checkbox"/> <b>Addressing Childhood Obesity and Health Inequities</b> Robert Wood Johnson Foundation (RWJF)	27 Jun 2025 Concept Paper Anticipated	\$1,000,000 USD

From the Funding  
Opportunity profile

Funding Discovery > Funding Search Results > Funding Opp Detail

**Addressing Childhood Obesity and Health Inequities**

Opp ID: 353dcc82-9333-4c04-a178-f2f1552f7976 | Institutional, Program or Curriculum Development | Last published on 27 Jun 2024

Website [https://www.rwjf.org/en/grants/active-funding-opportunities/2024/addressing-childhood-obesity-and-health-inequities.html?rid=0032S00002Z52BjQAJ&et\\_cid=2198117](https://www.rwjf.org/en/grants/active-funding-opportunities/2024/addressing-childhood-obesity-and-health-inequities.html?rid=0032S00002Z52BjQAJ&et_cid=2198117)

**Track**  
**Share**  
**Curate**

Dismiss Opportunity  
See alert recipients (0)  
See more opps like this  
Send feedback



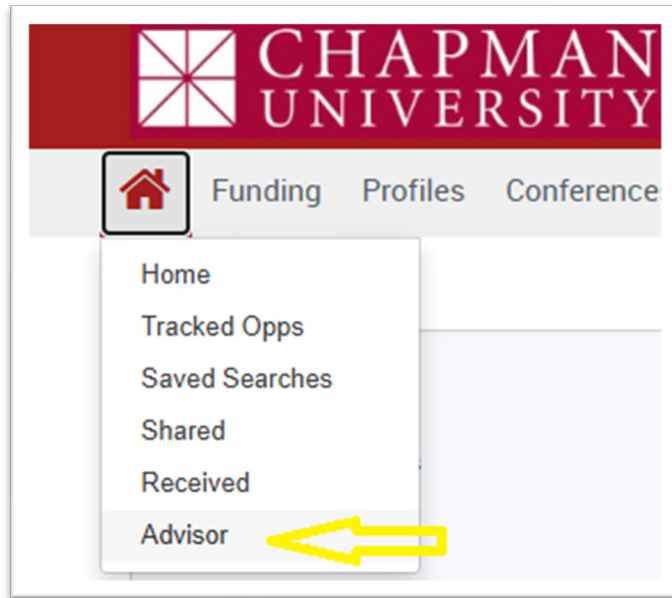
# Saved Searches & Tracked Opps

- Want to edit or update a Saved Search or Tracked Opp?  
Tracked Opps can be accessed in the Home menu

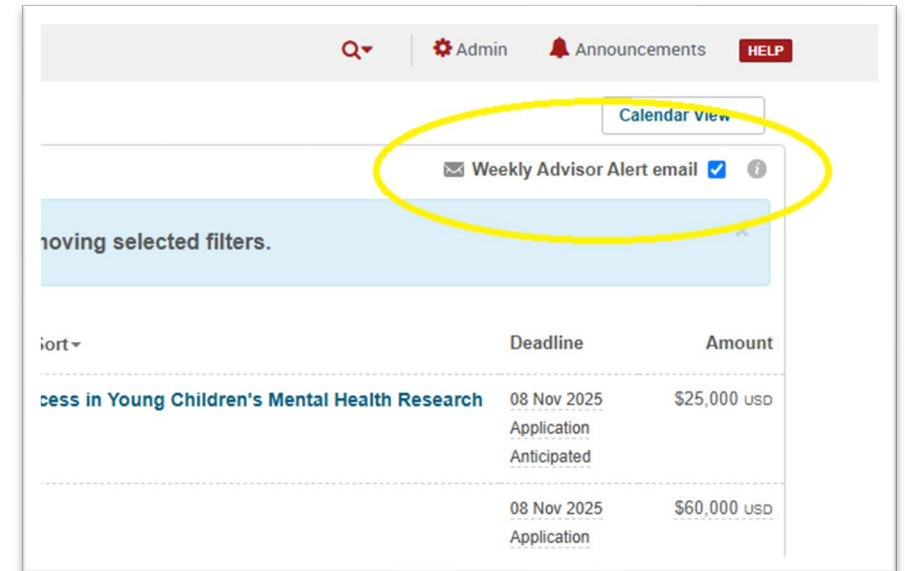


# Advisor Email Alert

- The Advisor email alert option will curate a list of funding opportunities based on the information in your profile.
- The more information and keywords you detail in your profile, the better Pivot can work for you!



Make sure the  
Weekly Email Alert box  
is checked!




# Tips for Advanced Search

- Search is not case sensitive. Do not use articles (a, an, or the), the search engine does not look for this.
- Do not use punctuation except for a hyphen needed for specific terms such as Covid-19 vs Covid 19.
- Use Truncation (Asterisk), Proximity Operators (pre/#, w/#), Exact Phrase Searching (Double Quotes), and Precedence (Parentheses) to give your search more flexibility. For example:
  - bas\* returns items with words that start with bas, such as basic, basketball, baseball and basket.
  - Lead\* returns items such as leader or leadership.
  - (gene w/2 mouse) or "mouse genome" – returns items that have the word gene within two words of mouse or that contain the exact phrase mouse genome.

# Finding Collaborators

Pivot will recommend potential collaborators based on your funding opportunity choices. They will be listed on the right-side panel.



The screenshot displays the Pivot interface for a funding opportunity. The main panel on the left shows details for 'Community Grants' with the following information:

Field	Value
Website	<a href="https://www.sandiafoundation.org/community-grants/">https://www.sandiafoundation.org/community-grants/</a>
Funder	Sandia Foundation
Funder Type	Private Foundation or Non-Profit
Country of Funder	United States
Applicant Type	Non-profit
Career Stage	Not Applicable

The right-side panel contains a 'Potential Collaborators' section, which is highlighted with a yellow circle. It shows the following counts:

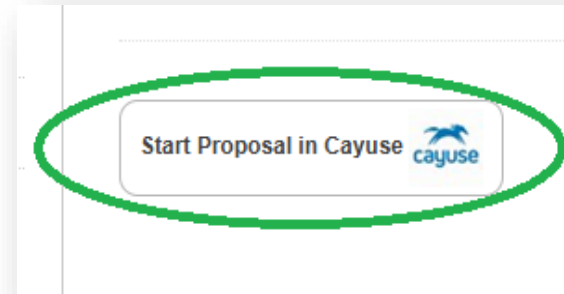
- 779 from inside your institution
- 500+ from outside institutions

Other options visible on the right include 'Track', 'Share', 'Curate', 'Dismiss Opportunity', 'See alert recipients (0)', 'See more opps like this', and 'Send feedback'.

Collaborators are discovered inside and outside Chapman. There are filter options to better narrow down your recommendations

# Chapman University Internal Process

- When you identify that a proposal will need to be submitted through the university contact SPS.
- A proposal record needs to be created in [Cayuse SP](#) for internal approvals of proposal. Cayuse button will appear on right hand side of Funding Opp screen.



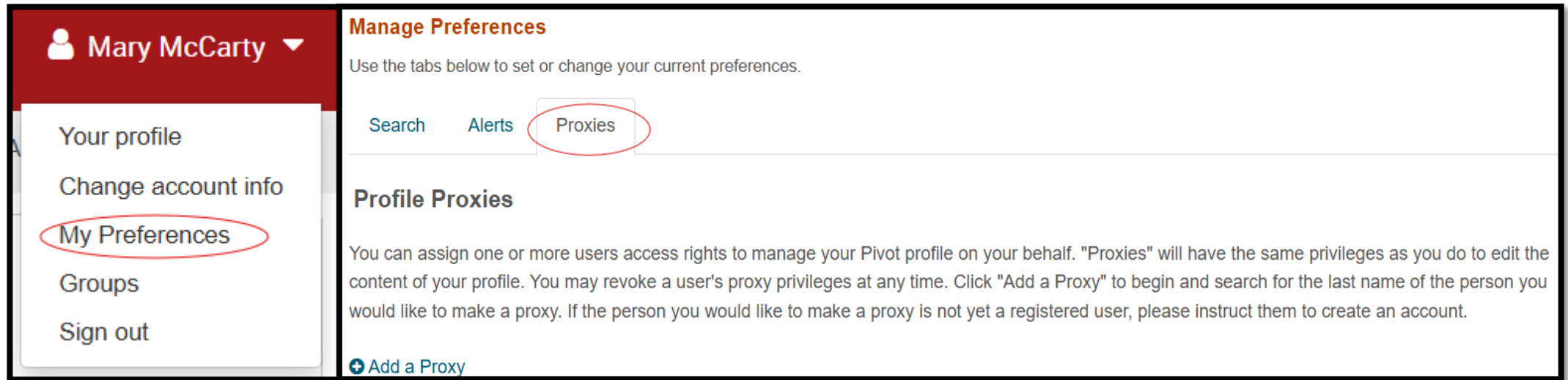
- According to CU policy a graduate/postdoc student can only serve as a PI on fellowship and trainee applications. For other types of proposals, a PI exception request will need to be made following the process listed in the [PI Eligibility Policy](#).
- If RFA states that a limited number of proposals will be allowed from per institution, please contact SPS.

## Additional Resources

- PIVOT-RP YouTube Channel  
<https://www.youtube.com/user/ProQuestPivot>
- Pre-Award – Office Hours – 1<sup>st</sup> Thursday of the Month at 11am on [Zoom](#)
- Leatherby Library – Office Hours – 2<sup>nd</sup> Wednesday of the Month LLC 129 and on [Zoom](#)
- Start your proposal in [Cayuse SP](#) to initiate support from the Pre-Award team.

# Setting a Proxy

- On the upper right-hand side of the screen click arrow next to name and choose My Preferences and then choose Proxies and follow instructions.



**Mary McCarty** ▼

- Your profile
- Change account info
- My Preferences**
- Groups
- Sign out

### Manage Preferences

Use the tabs below to set or change your current preferences.

[Search](#) [Alerts](#) **[Proxies](#)**

#### Profile Proxies

You can assign one or more users access rights to manage your Pivot profile on your behalf. "Proxies" will have the same privileges as you do to edit the content of your profile. You may revoke a user's proxy privileges at any time. Click "Add a Proxy" to begin and search for the last name of the person you would like to make a proxy. If the person you would like to make a proxy is not yet a registered user, please instruct them to create an account.

[+ Add a Proxy](#)



# 5 Ways to Get the Most from Pivot

- 1) **LOGIN TO YOUR ACCOUNT** Log into PivotRP at <https://pivot.proquest.com> with your username and password
- 2) **CLAIM & UPDATE YOUR PROFILE** Claiming and keeping your profile updated enables better funding opportunity matching. It also increases visibility for you and your institutions, so you are more easily discovered by other users and potential collaborators
- 3) **SEARCH, SAVE & SHARE FUNDINGS** - Start searching for funding opportunities using: Quick Search, Advanced Search and Sponsor search. Save Funding Opportunities as Tracked opportunities. Shared opportunities are an easy way to keep track of opportunities shared with other researchers, including messages sent.
- 4) **COLLABORATE** - Create groups of people from profile search results for easy opportunity collaboration
- 5) **RESOURCES FOR RESEACHERS** Educational YouTube channel Outstanding Support

# **Sponsored Projects Services Pre-Award Administration**

**Molly McCarty, Director, Pre-Award Administration ext. 7394**

**Megan Faulkner, Senior Research Administrator, ext. 5459**

**Kris Edmonds, Research Administrator, ext. 4577**

**Kara Gregory, Pre-Award Analyst, ext. 2831**

**Larrisa Wong, Pre-Award Analyst, ext. 5351**

**SPS general email: [sps@chapman.edu](mailto:sps@chapman.edu)**



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