COS Pivot Training Outline for Faculty

Funding

The funding database contains approximately 26,000 records; it is important to remember that records are removed after the deadline for the opportunity has passed. New records are added daily.

Every record in Pivot is indexed by a COS editor. Each record is indexed with keywords from the Pivot Funding controlled vocabulary, and contains a hyperlink to the funding opportunity from which it was indexed.

I. Advanced Search(AS)

A. Constructing a search strategy actually easier in the long run in AS vs. Quick Search(QS)!

1. In AS, go to **Requirements** ; select
   a. Academic Institution
   b. Ph.D/M.D./other professional
   c. Others applicable
      i. New Faculty/New investigator
      ii. Women
      iii. Minority
      iv. Persons with disabilities
2. Make selection(s) for **Citizenship or Residency (***may be set in advance by local Pivot administrator)*
3. Optional: **Activity Location(s)**
4. **Save Search** (This is your template)
5. Refine Search
   a. Add a free-text search strategy to this template using the search boxes at the top of **Advanced Search;** or
   b. Add to the Search Strategy using **Keywords**
   c. Use any of the other **seven** fields in **Advanced Search** to customize search results (multiple *selections may be made via control + click)*
      i. **Amount**
      ii. **Deadline**
      iii. **Limited Submission/other internal coordination** (*note: since this field only contains two attributes—limited submission AND other internal coordination, and if there are records with these attributes, they always appear at the top left of search results page*)
      iv. **Activity location** *(may be set in advance by local Pivot administrator)*
      v. Funding type
      vi. Requirements
      vii. Sponsor type
   d. If necessary**, Exclude search terms** (all nine of the fields above are displayed under exclude)

II. Keywords

A. Controlled vocabulary: 11 first-level categories 3,683 total terms

B. 'Explode' returns terms indexed under terms selected

C. Searching

1. **Search** Makes suggestions regardless of where the term being typed appears; will also land cross-referenced terms; Returned terms show the Hierarchical path where term sits
2. **Browse** Hierarchical, alphabetical list; up to four levels deep

D. Suggestion:

1. Find **Keywords** applicable to subject expertise (usually 3-8 terms)
2. Save the search strategy; make sure that the 'e-mail weekly' is turned on

III. Quick Search (rules here also applicable to free-text search in Advanced Search)

A. **Quick Search** requires following caveats:

1. ***food security*** will automatically 'OR' these two terms (quick search engine functions with an implied 'OR')
2. **food OR *security*** will also retrieve all records containing either the words food or security
3. ***"food security"*** will yield records with these two words adjacent
4. ***"food w/5 security*** will yield records with these two words within five words of each other (proximity operator = w/any #)
5. **NOT** operator may be used
6. **Wild card** (*) may be used
7. Many of the best ways to focus search results are not accessible via QS; post-search results display shows refinements in five index fields **BUT** only the top **five** attributes:
   a. Submission type **(2 attributes)**
   b. Sponsor type **(9)**
   c. Funding type **(15)**
   d. Requirements **(12)**
   e. Keywords **(11 first level; 3,683 total)**

   ….therefore a searcher may miss attributes that are not in the top five

IV. Monitoring and Manipulating Funding Opportunities

A. Shared*:* *Opps may be shared*:

1. With anyone via e-mail
   a. Pivot subscribers may view shared opp(s) perpetually
   b. Non-subscribers may view opp for 14 days
2. When looking at a single opp
3. From a list of search results
4. From the Tracked or Active Opps lists
5. Groups may be created and saved to send Opps

        a. On the fly; begin typing name of faculty member/Pivot account holder at your organization. If the name has an account in Pivot, auto-fill will make suggestions
        b. From a list of faculty in scholar profiles

B. Received

1. After Receiving an Opp (from another Pivot subscriber, a local Pivot Administrator) it may be
    a. Tracked
    b. Made Active
    c. Dismissed and removed

C. **Tracked** and **Active** Opps

1. May be tagged with any term for an additional access point on end-user's account

2. May be monitored for changes made by COS editor or local Pivot administrator (default setting: *e-mail when updated*)
3. May be shared with any other Pivot subscriber perpetually; non-subscribers may access shared records for 14 days

D. **Active Opps**

1. Appear on an account's home page after log-in; therefore, this should be regarded as the place to put most important opps

E. **Tracked** Opps

1. Require extra mouse clicks to see **Tracked** Opps
2. Local Pivot administrator can put opps directly into any user's Tracked area

F. Saved Search strategies

1. Clicking name of saved search will yield new opps added in the last week
2. Page with new opps will show radio button ("All") to view all opps
3. Pull-down menu
    a. Share a saved search with others (only may be shared with someone at a subscribing organization)
    b. Edit
    c. Add Tags
    d. View Archived results (if applicable)
    e. Alert e-mail off
    f. Delete
4. Local Pivot Administrator may put Saved Searches in end-users' accounts

Scholar's Profiles

Profiles in Pivot are gathered one of three ways:

1) **COS Pivot's proprietary searching technology**. This technology searches the open web (primarily .edu sites), looking for profiles of faculty members at four-year colleges and universities who have teaching responsibilities. Pivot profiles are indexed from the information gathered from the web pages searched. Once a profile lands in Pivot, its owner may "claim" their profile and update it.

2) **COS Expertise**. COS Expertise was a legacy product that contained approximately 500,000 profiles. These profiles were migrated to Pivot.
3) **Suggest a scholar:** Faculty members, Pivot administrators, graduate students with teaching responsibilities, and others may suggest themselves as a scholar. Upon editorial review, they'll be notified whether they've been included.

I. Quick Search

A. 'By name' vs. 'By text'
B. Search within my institution vs. Search outside my institution
C. Search box automatically puts 'OR' between multiple terms
D. 'AND', 'NOT' operators may be used
E. Multiple search terms need quotes ("feline HIV") to search an exact phrase
F. Wildcard* (nano*)

II. Advanced Search

A. Community tree:

1. Pivot's indexing for Profiles; classifies scholars in disciplines based on their affiliation
2. Generic listing based on structure of universities and the U.S. Dept. of Education's list of disciplines in higher education
3. Not a subject thesaurus; does not break down into the discrete topics that would be covered under the broader discipline terms
4. Scholar may appear under more than one discipline from the tree; this occurs frequently because scholars may have multiple affiliations and disciplines
5. There are 258 headings in the community tree:
    a. 15 discipline (level 1) headings
    b. 144 Level 2 headings
    c. 90 Level 3 headings
    d. 9 Level 4 headings

B. **Search Terms Box** (works like Quick Search for Pivot Funding)

C. **Check boxes**: Nine other attributes may be selected for searching:

1. Expertise
2. Title
3. Keywords
4. Abstract
5. Homepage
6. Scholar name
7. Publication page
8. Affiliation
9. CV page

D. **Pull-down menus**:

1. Degree (13 options; multiple may be selected)
2. Role (28 options; ; multiple may be selected)

E. **Other Search Boxes**:

1. Name

2. E-mail (a suffix may be searched, e.g.: @yale.edu)
3. Affiliation or society

Claiming Profiles

Claiming a profile in Pivot is the process of connecting a Pivot account with a profile. The advantages of a claimed profile are:

I. Pivot will then show an account holder the Pivot Advisor:
   A. Analyzes a Pivot Profile and matches it with Funding Opps
   B. More detailed a Profile, the better the advisor matches a profile to Funding

II. Updating Profiles: seven fields
   A. Names (all versions of a name that a scholar has published enter should be entered)
   B. E-mail addresses (all e-mail addresses that were used for teaching, publishing, etc.)
   C. Webpages (six options in Pull-down menu)
      1. Homepages, online CVs, or a webpages containing publications will be searched and indexed
      2. Contents will be indexed for searching and funding matches (Funding Advisor, see above)
   D. Degrees
   E. Affiliations
   F. Publications (See webpages, above)
   G. Expertise and other info

Pivot Support

I. Webinars
II. Pivot YouTube Channel
III. “Paper”-based documentation + search box
IV. RefWorks-COS help desk (phone or e-mail)