## 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.*

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<thead>
<tr>
<th>Section</th>
<th>Description</th>
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<tbody>
<tr>
<td>Create a Pivot Account</td>
<td>To register for an account with Pivot, go to <a href="http://pivot.proquest.com">http://pivot.proquest.com</a> 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.</td>
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<tr>
<td>Basic and Advanced Searches</td>
<td>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.</td>
</tr>
<tr>
<td>Results Review</td>
<td>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.</td>
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<tr>
<td>Tag, Track, and Share</td>
<td>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. 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.</td>
</tr>
<tr>
<td>Contact Sponsored Programs</td>
<td>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 <a href="mailto:esparzastlod@merrimack.edu">esparzastlod@merrimack.edu</a> for federal/state funding and Lauren Carr at <a href="mailto:carrl@merrimack.edu">carrl@merrimack.edu</a> 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.</td>
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**Pivot Help:**

[http://libguides.merrimack.edu/pivot](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.”
6. **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.
7. **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.”
8. **Keyword:** This field lets you add a keyword to your search. It is redundant if you’ve filled out the search term section properly.
9. **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.”
10. **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.
11. **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.

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