Go Pivot-RP

Overview

Background

Pivot-RP is the new user experience for our database containing research funding opportunities for all disciplines and project types. It has significantly more features, functionality and customization options compared to Research Professional.

Some highlights of ways in which the Pivot-RP UI differs from RP:

- The user interface is highly customizable to match your institutional branding (including weekly email alerts)
- Searches can be narrowed down by a faceted navigation sidebar
- Limited submissions calls are flagged, can be filtered, and can receive a global note for demand management
- It is possible to track individual opportunities and get automated alerts and calendar reminders from the system when our editors update the opportunities
- It is possible to add your institution's internal funding opportunities to the database
- Integrated researcher profiles allow researchers to get recommended funding opportunities (Profiles can be integrated w/ORCID)
- The ability for users to create Private individual workgroups
- Ability to schedule recurring newsletters to send relevant funding to targeted groups
- Expanded administrator reports to track usage and ROI
- Modern, accessibility first design that works well across all devices

What is the "Go Pivot-RP" program?

Go Pivot-RP is a largely self-switch process to move from Research Professional to Pivot-RP, driven and managed by your institution. With guidance from our Go Pivot-RP team and online resources, Research Professional Admins will be able to use and configure a Pivot-RP site to use in parallel to your Research Professional service. This has no impact on your users' ability to keep using Research Professional. Users will only see Pivot-RP until you choose to expose them to it.

Once you have familiarized yourself with the Pivot-RP site and have configured it, this becomes your official Pivot-RP site. You "go live" by simply directing your end-users to start using Pivot-RP (via the Pivot-RP URL https://pivot.proquest.com) instead of Research Professional.

The Go Pivot-RP process involves the following five steps:

1. **Enablement** – You will start the process by contacting our Support team (goPivotRP@clarivate.com) and request a trial of Pivot-RP. You will also be provided a trial agreement and amendment letter, referencing our DPA (https://clarivate.com/download/data-processing-addendum/). We will provide you with access to a trial site that will run in parallel to your Research Professional service.

2. **Authentication set-up** – *Optional* If SSO/Shibboleth authentication is desired for your institution, you would let our team know at goPivotRP@clarivate.com. Our team does the set-up for you, but this does require some coordination with your IT team. (This can take 4-6 weeks to set up.)

3. **Configuration** – You will want to customize the Pivot-RP user interface to reflect your university branding and you might want to consider creating curated lists or searches, groups, newsletters, and/or add internal opportunities – these can be configured at any time during the lead up or post go-live. In parallel to customization activities, Researcher Profiles are created by the Pivot-RP editorial team as part of the set-up of the Pivot-RP service (Profiles take 4-6 weeks to create and this work is started closer to your preferred go-live date.) Configuration and authentication can be configured in parallel.

4. **Go Live** – When you are ready to upgrade from Research Professional to Pivot-RP, the trial site will then become your official Pivot-RP site. Any customization, configuration or set-up work you decide to do during the trial will automatically carry over to your live site. You will also want to market or promote the new service to your end-users. This can be done by creating some custom training materials or pointing your users to guides, videos and documentation already created by the Pivot-RP team.

5. **Moving forward with Pivot-RP/Turning off Research Professional** – After you go live with Pivot-RP, we will turn off access to Research Professional only when you tell us it's okay to do so. (A 30 or 60 day period works best.) Future invoices and renewals for the service moving forward will reflect that you are now a Pivot-RP customer.

What and Who is needed from our institution to make the transition?

To prepare for a Go Pivot-RP transition you should:

- Determine your team – identify the people who know your institutional needs and can complete the necessary steps. Most of the steps happen in parallel and over the course of a few months so it's okay to just get started if you don't have everyone in place. The people typically involved in the Pivot-RP transition include:
    - the primary RP admins in the research office
    - any decision makers who need to sign off on the switch (if different than the primary RP admins mentioned above)
    - any additional staff who help educate/train or raise awareness of Research Professional to your end-users (This could be staff in the research office or library or a Web master, etc.)
- Determine timelines – establish a schedule, including the project start date and approximate desired go-live date, based on availability and needs.
- Inform your IT department – you may require IT assistance for the authentication configuration step.
- Consult with who might be needed to review the trial agreement and amendment.

Help and Support

There are some dedicated Go Pivot-RP support channels to help you set up Pivot-RP:

- Documentation – use our comprehensive online Go Pivot-RP pages, available in a step-by-step format, to help you transfer to Pivot-RP.

- Go Pivot-RP info email – submit any transition questions via email to goPivotRP@clarivate.com or discuss with our customer success and support teams
- Attend Go Pivot-RP Sessions – (live or recorded) learn from our Support team about how to use Pivot-RP capabilities and get answers to FAQs.

Step 1: Enablement

Getting Started and Setting Up Pivot-RP

Upgrading to Pivot-RP begins by requesting access to a Pivot-RP site for your institution. The trial site will run in parallel to your Research Professional service.

Email goPivotRP@clarivate.com with the following information:

- **Subject**: RP to Pivot-RP Trial Request for {insert institution name}
- **Description**:
    - One primary admin contact name and their email address
    - Any email domains that should be included in the trial

We will create the Pivot-RP account and send a “welcome letter” with a link to the trial site and credentials. To log in, go to https://pivot.proquest.com, enter your credentials and click on 'sign in'.

Once the site has been created, any other colleagues who might want to join in using Pivot-RP can create their own accounts by going to https://pivot.proquest.com and selecting 'Create Account' using their institutional email address and selecting your institution as their affiliated institution. You can then give them elevate them to be additional Pivot-RP admins and can assign different levels of admin privileges.

In addition to providing access to a trial site, we will also provide a trial engagement and addendum which links to our latest Data Processing Addendum and clarifies that you are using Pivot-RP under the terms of your current Research Professional service.

Using the trial site you will familiarize yourself with Pivot-RP features and functionality. Customize the user interface to match your institutional branding and set your preferred institutional search filters and preferences.

Step 2: Authentication

Before launching Pivot-RP, you may wish to have us configure SSO authentication which allows your users to authenticate to the service using their institutional credentials.

Setting up SSO is optional. Whether you set-up SSO or not, your users can always create a user account using their institutional email address and by creating a password.

SSO and IP Authentication:

- Pivot-RP is usually configured with your institution's IP address. This allows your users who are within your institution's network to search in Pivot-RP and view results without further authentication.
- Users who wish to track opportunities, save searches, set-up alerts and more, will need to create a personal account and login to use these features.
- If needed, our support team can configure Pivot-RP to work with your SSO gateway. This process can take on average 3-4 weeks. Please email the migration team goPivotRP@clarivate.com with the following:
    - **Subject**: Pivot-RP SSO Request {institution name}
    - **Description**:
        1. Subscriber name
        2. Your IDP (Identity provider)
        3. Do you use ePPN or ePTID (Person Principal Name or Person Principal ID) to identify users?
        4. The point of contact at your institution for the implementation
        5. Test credentials that we can use to debug our configuration

Important Information for Your IT Team:

- The Pivot-RP Service Provider (SP) is: https://sso.clarivate.com/sp.
- The SP Metadata is available at: https://www.webofknowledge.com/SP-Metadata.xml.
- Please note: WebofKnowledge is a sister-product to Pivot-RP and also part of Clarivate. When you view the metadata file you will see the AssertionConsumerService https://sso.clarivate.com/sp/ACS.saml2.
- If you use eduPersonPrincipalName, please release "eppn". If you use eduPersonTargetedID, please release "persistent-id" or "oid-targeted-id" Other attributes would be needed if you used scope (sub institution level access) or affiliation (user roles).

Step 3: Configuration

Researcher Profiles

Before launching Pivot-RP for your end-users, you will want to consider whether you would like us to create your organization's researcher profiles. To initiate the creation, please email the go Pivot-RP team at goPivotRP@clarivate.com.

- Our editorial team creates researcher profiles for all your faculty/researchers using publicly available information from your website directory and/or other public facing profiles you may already have on your webpages as a guide.
- The profiles represent your organization, departments and researchers and can be seen by all your Pivot-RP users on the "Profiles" tab within Pivot-RP.
- Profiles facilitate automated funding recommendations for your researchers. And, funding opportunities are matched

to profiles to help users identify potential collaborators. You also can search across these profiles by name, topic, discipline to find researchers that match your query.

- For more information, see [FAQs about Profiles in Pivot-RP] for Researchers and Administrators

Profiles are not created until you provide an email requesting them and/or your institution has signed the one-page trial engagement and addendum letter which outlines our latest Data Processing Addendum.

For individuals with privacy questions about profiles you may wish to read more here: https://knowledge.exlibrisgroup.com/Pivot/Knowledge_Articles/Managing_Personal_Data_in_Pivot-RP

Since our editorial team creates the organizational heirarchy (colleges, schools, departments, etc.) from your institution's website, sometimes changes will be needed after the inititial creation based on your review and feedback. For this reason it is best to try to have your profiles completed at least a few weeks before your intended go-live date to accomodate time to make any requested changes or corrections.

If you wish to provide our editorial team with a spreadsheet containing names of researchers with their departments, titles, contact information, ORCID IDs, then our team will be happy to use that information as the guide or supplement in setting up the profiles. This is optional to provide.

Profiles + User Accounts:

Researchers can have profiles in Pivot-RP, regardless of whether they have a user account or even know about Pivot-RP. We try to make the profiles representative of all the researchers and faculty at your institution.

While the Pivot-RP team creates your organization's researcher profiles, we do not create user accounts. Only researchers who login to Pivot-RP and create an account will have a user account. Once you launch Pivot-RP, your end users will register for their own account by logging into Pivot-RP at https://pivot.proquest.com.

When a user first creates their user account, Pivot-RP checks to see if we already have a researcher profile for that user. If the user has a researcher profile in the system, they are prompted to "claim" the profile. This allows them to then edit any of the content on the profile. In addition, by claiming their profile the researcher can then get an automated weekly funding alert (called the "Adviser Alert") with funding recommendations that are based on the content of their profile. In addition to the Advisor Alert, users can also create unlimited numbers of saved searches for their research topics of interest to get weekly alerts on those as well. (Pivot-RP sends just one, aggregated weekly funding alert per researcher.) Anyone with a user account that does not have a profile created for them in the system, can create their own profile.

Typically, we would want to update your researcher profiles before you launch the service. That way your researchers can claim their profiles when they first create user accounts and then they can begin getting good funding recommendations with little effort. We can add and delete researcher profiles at any time if you get new researchers in the future, or, have faculty leave.

As it can take at least 4-6 weeks for our Editors to configure your institution's profiles, we need you to provide us an estimated timeline when you plan to go live with Pivot-RP so that our team can work backwards from that date and schedule the work accordingly.

Customization

Most institutions will want to customize the Pivot-RP user interface to reflect your branding. You might also want to consider creating curated lists or searches, groups, newsletters, and/or internal opportunities – these can all be configured at any time during the lead up or post go-live.

Usually, institutions will at minimum customize the Pivot-RP home dashboard by adding a background image and logo. We also recommend toggling on an institutional search filter to match your region – this will insure that your end-users by default are seeing only funding opportunities for which they technically are eligible to apply. None of these configurations require any IT or programming skills.

Further guidance on customizing Pivot-RP branding and search settings can be found here: https://knowledge.exlibrisgroup.com/Pivot/Product_Documentation/Admin_Dashboard/10_Configuring_Pivot#Customizing_the_Pivot_User_Interface

Marketing

With the launch date in mind, we can support you in your marketing plans that will alert your users about the new service.

Some institutions will send email communications about Pivot-RP, or conduct training sessions, and/or add links to the service on your own webpages along with documentation or help guides. A few additional guides, posters, table-top promo cards and logos can be found here:

- https://knowledge.exlibrisgroup.com/Pivot/Product_Materials/Resources_and_Support/040Marketing_Resources
- Links to our training page – these can be embedded or linked to from your pages: https://knowledge.exlibrisgroup.com/Pivot/Training - Click on the boxes, then "show all topics" for links to our most up-to-date video tutorials + links to related documentation.
- YouTube page/videos: The newest videos are in the playlist at the bottom called Pivot-RP essentials https://www.youtube.com/channel/UCvqTICqOL21JU0CKwgBirHg
- Pivot-RP Essentials playlist: https://www.youtube.com/playlist?list=PLnGJ0ZFPuFYUtVVfAhpn_wrkK_pZXG1XO
- Some tips for engaging with stakeholders and rolling out the service. It also includes some marketing messages if you want to include them on your site:

  https://knowledge.exlibrisgroup.com/...rding__Toolkit

Step 4: Go Live

- We consider Pivot-RP "go-live" to be the point at which you make your user community aware of Pivot-RP and provide instructions for them to access Pivot-RP via https://pivot.proquest.com and provide instructions for them to create their accounts and begin using the service. Usually this is accompanied with a message that Pivot-RP is the new service and that Research Professional will be going away soon.
- When you are ready to go live with Pivot-RP, please notify the Pivot-RP migration team at goPivotRP@clarivate.com to let us know a timeframe or launch date.
- The actual "go live" simply means you are providing a link to the Pivot-RP URL for your users to login and access the service.
- Your Research Professional service can remain live and running up to 4 months after you decide to go live with Pivot-RP. We recommend you try to keep this to 30-60 days to avoid confusion as users might get alerts from two different services.

Step 5: Moving Forward with Pivot-RP

Turning off Research Professional

After you go live with Pivot-RP and have launched the new service to your end users, you will want to have our Support team disable access to Research Professional. We recommend this be done within a 30 to 60 day time period to avoid any unnecessary confusion for your end-user who might potentially be getting alerts from two different systems.

Announcing to your end-users a specific date which you will turn-off access to Researcher Professional will also help improve adoption of Pivot-RP.

We will turn off access to Research Professional only after you tell us it's okay to do so. Please contact our Support team to let us know that you are fully live with Pivot-RP and to let us know what data is okay to switch off access to RP.

Costs and Invoicing

There is no cost for upgrading to the Pivot-RP service and no need to sign a new license agreement. You have the option to keep using Pivot-RP under the same terms and with your existing Research Professional license agreement provided you have signed the 1-page trial amendment agreement. Future invoices and renewals for the service moving forward will reflect that you are now a Pivot-RP customer.

If you prefer you can request that our renewals team provide you with a new Pivot-RP license agreement upon renewal. If you have any questions, you can consult with your dedicated Renewals Account Manager.

Getting Support for Pivot-RP

Pivot-RP offers the same great service and support for Pivot-RP admins and your end-users alike. Anyone in need of help can select the "help" link in the Pivot-RP user interface.

In addition to direct support, we provide a number of self-serve guides and videos and extensive documentation. We also provide period online training sessions (live and recorded) for Pivot-RP admins and general users.

Our short training modules are often a good place to start for help on using Pivot-RP: https://knowledge.exlibrisgroup.com/Pivot/Training

Still have questions?

Try reviewing our [FAQ documents]() on our overview page

Contact our team at goPivotRP@clarivate.com