Pivot Funding: Tracking Opps

- **Product:** Pivot

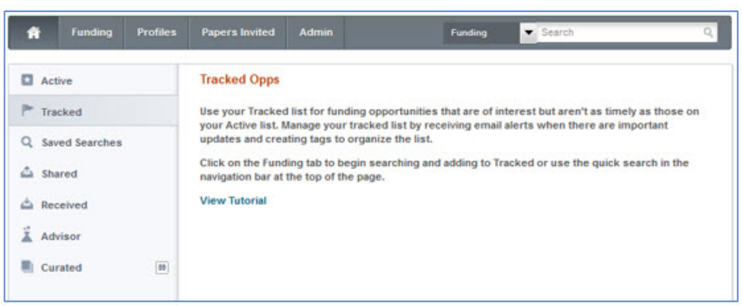
There are many the type of funding opportunity functionality available in Pivot like; Track, Active, Shared etc. This article will help you navigate the **Tracked** funding opportunity option.

Tracking Opportunities

Tracked opps are opportunities that you you want to monitor on your homepage, and are less critical than the **Active** opps. **Tracked** opps are opps that you would like to follow, and for which you can receive a **Funding Alert**.

When you Track an opp, you can also assign a “tag” to the opp to help you easily group and/or locate it later. You’ll see on your Homepage near the bottom left all the tags you’re currently using to categorize your Active and Tracked Opps. You can condense or expand your view based on a selected tag(s). You can track and tag opportunities from your search results or from within an individual funding opportunity. See the Help files on Funding in the Support area, for information on how to tag an opportunity.

When you first log onto your Pivot Homepage, you will land on your Tracked opps area. You’ll see the total number of opps that are being tracked including expired opps) on the left side of the page. The number of Tracked opps displayed is noted in orange near the top of the list. You can modify your view according to Type, which is found on the left side of the page.



Check or uncheck the boxes to see:

- Those tracked opps where the sponsor has limited submissions
- Those tracked opps that need internal coordination
- Opps that don’t fall into the limited submission or internal coordination categories – “Other”
- Tracked opps that have expired (the deadline has passed and these opps are no longer available)

There are two ways to track an opp:

1. **From the results page:** After running a funding search, you can mark one or more opps (by checking off the check box to the left of the opp title). You’ll then see an option at the top of the results list labeled **Track**. Click this box and you will have the option to create a tag for the opp, or to choose from your existing list of tags. This will track those opps in the **Tracked** section of your homepage.

2. **From within the record:** When you click on any of the opp titles on the results page, you'll be taken to the record itself where you'll see the option to **Track** on the right side of the page.

Note

If the opp is already being tracked in your Tracked area, a red Tracking label will appear. Once you have placed an opp in the Active list, you can tag them by choosing Add a Tag below it.

Tracked Opps Details

You can track as many opps as you want, there is no limit. Your view of your Tracked opps will show several things:

- Title of the opportunity, linking to the full record
- Any tags you've assigned to the opp
- Sponsor deadline
- What's due next (application, proposal, letter of intent, etc.)
- Options Menu
- Icons to indicate when a record
    - Has a limited submission – a "Limited" icon will appear next to the opp name
    - Needs some sort of University-level coordination necessary – a gray "ICR" icon will appear next to the opp name
    - Was recently updated – an orange "updated" icon will appear next to the opp name<
    - Has the alert email option enabled – an envelope icon will appear between the Deadline column and the Options menu.

You may notice opps on your Tracked list with a **"shared"** icon User-added image next to the opp name. This indicates that a Pivot Research Administrator from your institution placed this on your Tracked list. Clicking on the **"shared"** icon User-added image will display the name of the person who shared the opp as well as the date shared. Once you click on the **"shared"** icon, it will no longer display.

You can further refine your Tracked opps list by the **tags** you have assigned. On the left side of the page, your tags will be listed near the bottom. Checking a specific tag (or tags) will display only those tracked opps with the selected tags.

You can also select multiple items from the Options menu:

- 1. Share
- 2. Untrack
- 3. Move to Active
- 4. Add or Edit Tags
- 5. Alert email on/off
- 6. Deadline reminder on/off
- 7. Who you shared with
- 8. Who else is interested

Sharing the opp

To share an opp with someone, click the Options dropdown menu and select Share from the list. A light box will appear where you can type in a recipient, multiple recipients, or select a prepopulated Group. Type in an optional message, and when you're ready to share the opp, click Send. Click the box labeled, let each recipient see who else received this if you want to display for each recipient who the other recipients are.

Note

When sharing an opp with someone outside your organization (or with someone who does not have a Pivot account) the shared opp will only be available for viewing for 14 days. Pivot users will be able to view a shared opp indefinitely.

Untracking the opp

If you'd like to remove an opp from your list of Tracked opps entirely, select the "Untrack" choice from the Options menu. Click Yes to confirm.

Moving the opp to Active

If you'd like to move an opp from your list of Tracked opps and place it in your Active list, select the "Move to Active" choice from the Options menu. Click Yes to confirm.

Adding or Editing Tags

You can manage your tags from the Options menu by selecting either "Add a Tag" or "Edit Tags." If an opp does not have a tag assigned to it, you will see a menu item called "Add Tags." Click that to select an appropriate tag or tags for that opp. If the opp does have at least one tag associated with it, you can modify them by clicking "Edit Tags." The "Edit Tags" list shows you all the tags that are currently in use for your Active and Tracked lists; use the checkboxes to remove and/or add tags to that opp. You must click the "Apply" button for the changes to take place.

Note

Tags for individual opps are separate from tags for Saved Searches.

Alert Email

If you are currently set up to receive an Alert email about an opp, you will see an envelope icon in that opp's row. If you would like to turn the Alert feature off, click on your Options menu and select the menu item which reads "Alert email off." If there is no envelope icon in the row, the Alert feature has been disabled. To turn it back on, click your Options menu and select the menu item which reads "Alert email on."

Deadline Reminder

You can opt to receive an email alert two weeks before the deadline on opps in your Active list. If you would like to turn the Deadline reminder on, click **"Turn deadline reminder on"**. You will see a **stopwatch icon** confirming that you will receive an alert email two weeks prior to each deadline. The email will show all deadlines on the funding opportunity, with the deadline that is two weeks away highlighted along with info on what is due. You may disable the deadline reminder by clicking on your **Options** menu and selecting **"Turn deadline reminder off."**

Who you shared with

When you view the list of people you've shared an opp with, you'll see their name (which will be hyperlinked to their Profile, if they have one) along with any action they've taken on the opp you sent them.

Who else is interested

Mouse over this choice to view how many people at your institution have a particular opp on their Active or Tracked lists. Administrators can click on either option to see the actual names of those people.

Expired Opps are also linked to from the left-hand navigation. If an opportunity is no longer available and we do not anticipate it being offered again based on information from the sponsor, it is no longer searchable in the database. If an opportunity on your Active or Tracked lists expires, it automatically moves into your Expired opps list.

You can view the title of opportunities and info on the sponsor for your reference, but it is no longer possible to view the funding opportunity. You can delete items on the **Expired** list by clicking on the **Delete** link for a selected funding opp.

Sharing

In addition to being able to share an opp through the **"Options"** menu, you can also select an opp or a group of opps by checking the box to the left of the opp name. When you select at least one of those checkboxes, the **Tracked Opps** header and **Sort** option will be replaced by a Share button. Once you've chosen the opp or opps you want to share, click the Share button and you can fill out the light box as described above. Click the box labeled, let each recipient see who else received this if you want to display for each recipient who the other recipients are.

Note

When sharing an opp with someone outside your organization (or with someone who does not have a Pivot account) the shared opp will only be available for viewing for 14 days. Pivot users will be able to view a shared opp indefinitely.

- **Article last edited:** 10-Oct-2017
- **Old Article Number:** 9990