

Pivot-RP Newsletter Feature

Introduction

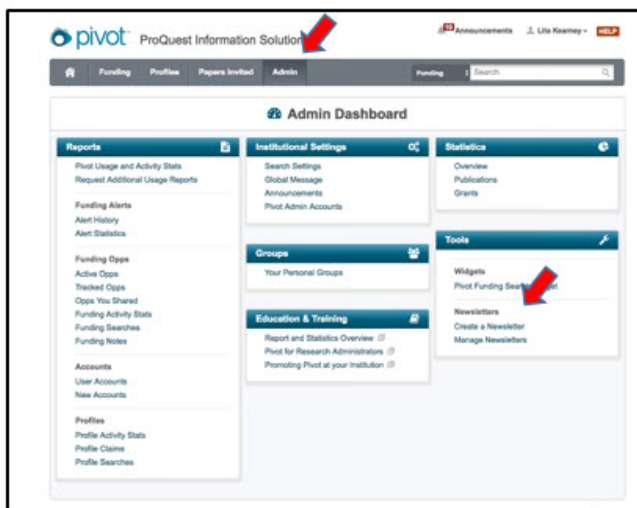
The Pivot-RP Newsletter feature is an efficient way for Admins to communicate with their researchers and principal investigators by including funding opportunities from their Pivot-RP [Curated Lists](#) and [Searches](#) in a newsletter created in Pivot-RP. Research Administrators can save time by tracking and distributing Pivot-RP funding opportunities all in one location.

Note

Admins can configure the logo in all newsletters; see [Custom Branding](#).

Getting Started

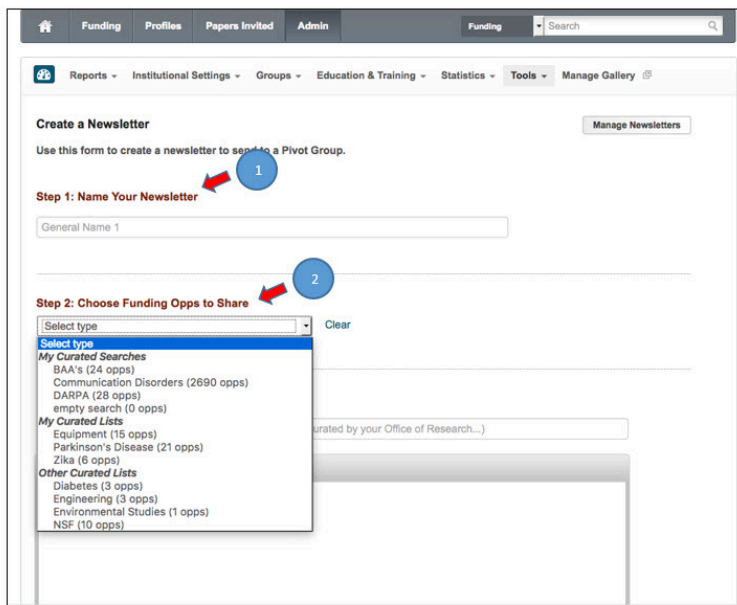
- To locate the newsletter options, select the Admin tab on the main page of Pivot-RP.
- Under the **Tools** section you will find two options under **Newsletters** heading.
 - Create a Newsletter
 - Manage Newsletter
- Select the option you want and get started.



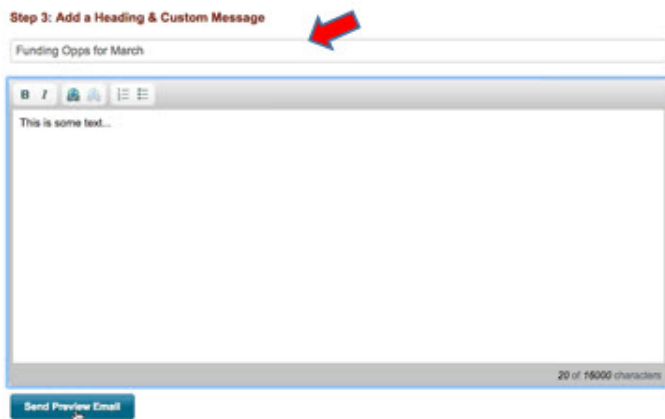
Creating a Newsletter

- To create a newsletter, follow the easy steps in the form

- Step 1: Type in the Name for your newsletter
- Step 2: Choose the funding opportunities you want to share in your newsletter.
- Select from one of your institution's [Curated Lists](#) or [Searches](#).



- **Step 3:** Type in the heading and add a custom message that will display in the newsletter to your readers.
- Select Send Preview Email to preview how your newsletter will appear to others



Example of Previewed Email

 Pivot Newsletter for Lita Kearney

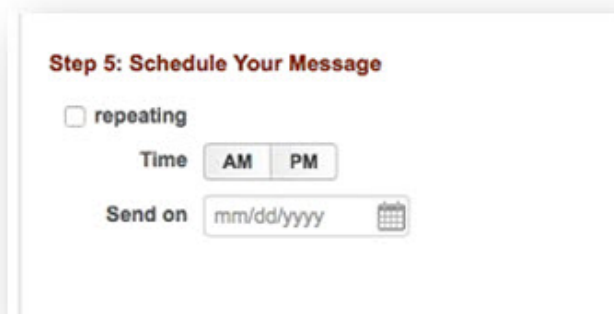
This is some text...

15 Opportunities	Deadline	Amount
Alexander F. Bodini Fellowship Italian Academy for Advanced Studies in America	05 Dec 2017 Application Anticipated	see record
Applied Research Competition Organization for Autism Research (OAR)	27 Mar 2017 Preliminary Proposal Confirmed	\$30,000USD
Autism Scholars Awards Ontario Council on Graduate Studies (OCGS)	01 Dec 2017 Other Anticipated	\$18,000CAD
Autism Single Investigator Innovation Program (Autism-SIIP) Maternal and Child Health Bureau (MCHB)	17 Nov 2017 Application Anticipated	\$500,000USD
Bridge to Independence Award - Request for Applications Simons Foundation Autism Research Initiative (SFARI)	01 Aug 2017 Other Anticipated	\$450,000USD

- **Step 4:** Choose a Group of Recipients – Pick from the list of choices based on whom you want to send the newsletter to.



- **Step 5:** Schedule Your Message
- Select the following:
 - If you only wish to send this Newsletter only once, select a specific time and date

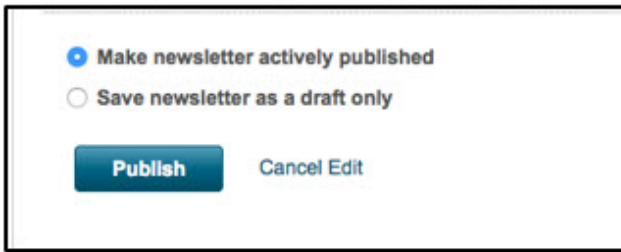


- If you wish to resend this Newsletter on a monthly or weekly cycle, select the repeating checkbox.
- Select how often you want it sent (weekly or monthly) and the day of the week
- Select the Time of day: AM or PM
- Select the Start and End dates

Last Step: Ready to Publish?

You can either:

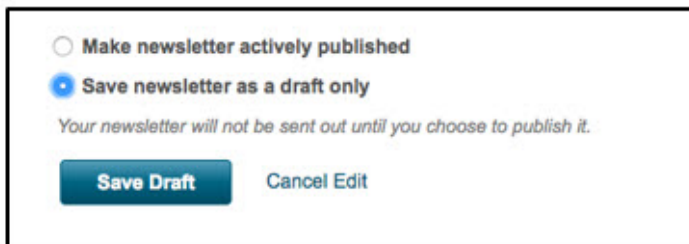
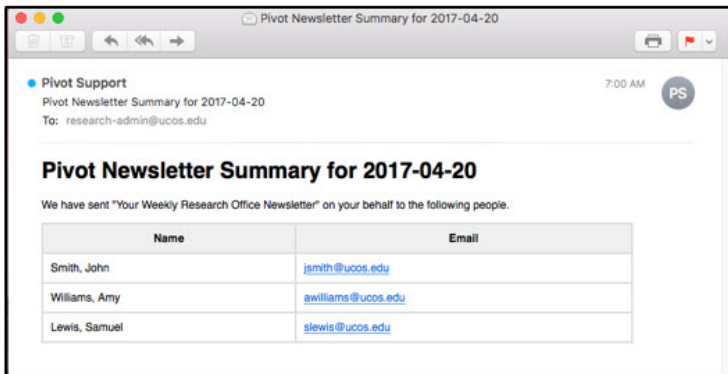
- Make your newsletter active by selecting the Make newsletter actively published radio-button and then clicking the Publish button.



A dialog box with two radio buttons and two buttons. The first radio button is selected and is labeled "Make newsletter actively published". The second radio button is labeled "Save newsletter as a draft only". Below the radio buttons are two buttons: "Publish" and "Cancel Edit".

- Or save your newsletter by selecting the Save newsletter as a draft only radio-button and then clicking the Save Draft button. You may further edit your newsletter in the Manage Newsletters page located on the Admin Dashboard.

After a newsletter is sent, summary email with the same statistics is sent to your email.



A dialog box with two radio buttons and two buttons. The second radio button is selected and is labeled "Save newsletter as a draft only". Below the radio buttons is a message: "Your newsletter will not be sent out until you choose to publish it." Below this message are two buttons: "Save Draft" and "Cancel Edit".

Viewing and Managing Newsletters

On the Admin Dashboard, select **manage your newsletters** under the Tools section to open the Manage Newsletters dialog box, which allows you to review current and past newsletters.



A dialog box titled "Manage Newsletters" with a "Create a Newsletter" button. Below the title is the text "View and manage your upcoming newsletter sends." At the bottom, there is a "View:" label followed by four radio buttons: "All" (selected), "Active", "Inactive", and "Past".

Filtering the List of Newsletters

The following review options are available:

- All Newsletters
- Active – currently published newsletters
- Inactive – saved newsletters that have not been published or are no longer active
- Past – all past newsletters

After selecting one of the above options, each newsletter is listed with the following information:

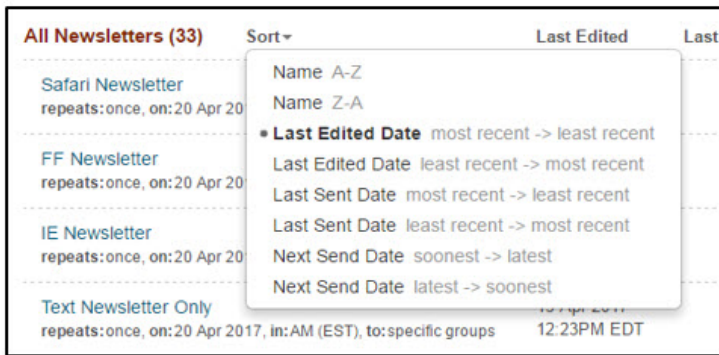
- The Name
- Last Edited
- Last Sent Date
- Next Send Date

All Newsletters (15)	Sort -	Last Edited	Last Sent Date	Next Send Date	Recipients
March Newsletter repeats: monthly, on: the first Monday, In: AM (EST), to: specific groups, starting on: 20 Mar 2017, ending on: 30 Jun 2017		10 Mar 2017 1:21PM EST		03 Apr 2017 AM	3 Options ▾
ABC Newsletter repeats: monthly, on: the first Monday, In: AM (EST), to: specific groups, starting on: 27 Feb 2017, ending on: 31 Jul 2017		10 Mar 2017 12:01PM EST		03 Apr 2017 AM	21 Options ▾
Foo Newsletter repeats: weekly, on: Monday, In: AM (EST), to: specific groups, starting on: 20 Mar 2017, ending on: 30 Jun 2017		10 Mar 2017 12:00PM EST		20 Mar 2017 AM	3 Options ▾
XYZ repeats: once, on: 06 Mar 2017, In: AM (EST), to: specific groups		27 Feb 2017 4:18PM EST		06 Mar 2017 AM	21 Options ▾
A Bogus Newsletter – Unpublished –		23 Feb 2017 12:51PM EST		27 Feb 2017 AM	21 Options ▾
Testing Newsletter 6 repeats: weekly, on: Monday, In: AM (EST), to: all Pivot users, starting on: 27 Feb 2017		23 Feb 2017 12:49PM EST		27 Feb 2017 AM	219 Options ▾

Sorting the List of Newsletters

The **Sort** drop-down allows you to select any of the following sort options:

- Name
- Last Edited Date
- Last Sent Date
- Next Send Date

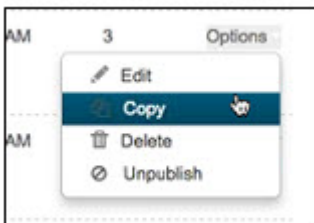


Managing a Newsletter

The **Options** drop-down field allows you to perform any of the following actions on a specific newsletter:

For each newsletter, you can select any of the following Options:

- Edit – edit the selected newsletter.
- Copy – duplicate the selected newsletter to start a new newsletter from that copy.
- Delete – permanently delete the selected newsletter
- Unpublish – Stop the publication of the selected newsletter.



Viewing Additional Details for a Newsletter

If you select the accordion arrow for a past newsletter, you can view a table of when the newsletter was sent, the total recipients, and the number of funding opportunities that were included in that mailing.

All Newsletters (33)	Sort	Last Edited	Last Sent Date	Next Send Date	Recipients	Options
▶ Safari Newsletter repeats:once, on:20 Apr 2017, in:AM (EST), to:specific groups		19 Apr 2017 12:55PM EDT	20 Apr 2017 AM		3	Options
▼ FF Newsletter repeats:once, on:20 Apr 2017, in:AM (EST), to:specific groups		19 Apr 2017 12:58PM EDT	20 Apr 2017 AM		3	Options
		Date Sent		Total Recipients	Total Opps	
		20 Apr 2017 7:00AM EDT		3	21	
▼ IE Newsletter repeats:once, on:20 Apr 2017, in:AM (EST), to:specific groups		19 Apr 2017 12:28PM EDT	20 Apr 2017 AM		3	Options
		Date Sent		Total Recipients	Total Opps	
		20 Apr 2017 7:00AM EDT		3	21	

Related articles...

- [Curated-Search-In-Pivot](#)

Date Created: 2017-10-10 -Pivot offers a new type of sharing for Research Admins based upon saved searches called Curated Search

- [Pivot-Admin-Curated-Opps](#)

Date Created: 2017-05-04 -Curated Opps Admin

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