
Pivot-RP Admin: Curated Opps

Introduction

Pivot-RP Administrators have the ability to create lists of funding opportunities that are visible to all Pivot-RP users in your organization. A new section of the Pivot-RP home page labeled **Curated** is visible (once you've created a list and added an opp). These lists have unique URLs that allow you to post them on a webpage, similar to a **Saved Search**. The difference is that the curated lists have specific funding opps you assign and a Saved Search simply runs a funding search where the results are potentially different each time the user clicks on the link.

Pivot-RP users cannot add or remove opps from Curated lists, but they can save them to their own Active or Tracked lists, or share them with colleagues.

Creating a Curated List

Admins can create an unlimited number of lists, and each list is "named."

To create a new Curated list:

1. From any funding search results list, select the funding opps you wish to place on the list.
2. Click **Curate**.

Alternately, you click the Curate option from within an individual funding opportunity record or from your Tracked or Active list:

3. You'll be prompted to name your list. Enter a new list name (30-character limit) or select a previously named list.

Note

You may see list names displayed that you are unable to select. These are lists created by other Pivot-RP Admins at your institution. You cannot create a curated list with the same name as an existing list, nor can you add opps to a curated list created by another Admin.

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4. Use the search box at the top of the Curate box to see if a list already exists with the name you have in mind. If you see the name in black type (see global warming example above), click the check box to add the selected opp(s) to that list. If you are creating a new list and the name you have in mind has not been used, click **Create New** and follow the steps to complete the process.

Viewing a Curated List of Opps

Your list(s) will be visible on the Pivot-RP Home pages of your users

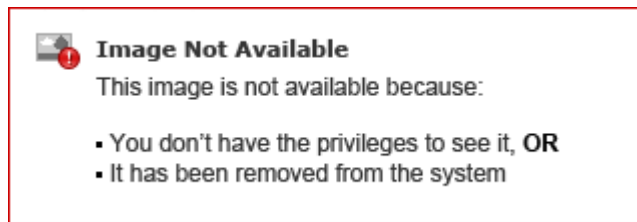
To view a curated list of opps from your home page:

1. Click **Curated** on your home page
2. Select the name of the list you wish to view.

Sharing a Curated List

To share or link to a curated list:

1. From your Pivot-RP home page, display the list you wish to share.



2. Click the link icon next to the list name at the top of the list.
3. A box will display with a unique URL that you can copy and paste into an email or display on a webpage.

Note

Opps on curated lists are only visible to other Pivot-RP users or to persons within your institution's IP range. Users cannot add opps to curated lists, but they may save them to their own Pivot-RP home page if desired.

Removing an Opp from a Curated List

To remove an opp from a curated list:

1. From your Pivot-RP home page, open the curated list with the opp(s) to remove.
2. Select the opp(s) to delete.
3. Click the **Delete** button and select either "Delete Opp(s)" to remove the selected opps or "Delete List" if you want to remove all opps and the list.

Adding a Note to a Curated List

Your notes will be visible whenever a user selects the **show details** link.

To add a note to a curated list:

1. From your Pivot-RP home page, display the list you wish to share.
2. Click the **show details** link.

3. Click the **add note** link.
4. Enter your text, up to 500 characters.
5. Click **Save**.

Editing a Note on a Curated List

To edit a note on a curated list:

1. From your Pivot-RP home page, display the list you wish to share.
2. Click the show details link.
3. Click the **edit** icon.
4. Modify the text.
5. Click **save** to save your changes or delete to remove the entire note.

Deleting a Note on a Curated List

To delete a note on a curated list:

1. From your Pivot-RP home page, display the list you want to update.
2. Select the **show details** link.
3. Select **delete** to remove the entire note.

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