

Sending Newsletters

This page is intended only for users who have administrative permissions.

In addition to:

- Sharing funding opportunities (see [Tracking Funding Opportunities](#)),
- Curating lists and searches for funding opportunities (see [Recommending and Sharing Funding Opportunities](#)),
- Adding notes and deadlines to funding opportunities (see [Viewing Funding Opportunities](#) and [Tracking Funding Opportunities](#)), and
- Emailing a user directly (which any Pivot-RP user can do),

an administrator can communicate with multiple users using a newsletter. This is particularly useful for sharing information about important funding opportunities with all or a group of users at your institution. Newsletters can be one time only or sent periodically.

In addition, an administrator can create announcement messages that appear to all users in the Pivot-RP UI.

Sending Newsletters to All/Groups of Users

Newsletters enable you to communicate with all or groups of users. For example, you can create reusable newsletters to share curated lists of funding opportunities with a targeted list of users once or periodically. A periodic newsletter is a particularly useful means of sending updates about a list of funding opportunities. Pivot-RP automatically notes any changes or additions to the list that have occurred in between each of the times that the newsletter is sent.

You can work on a newsletter in stages before actually publishing it.

To configure groups of users, see [User Groups](#). To configure the logo that appears in all newsletters; see [Pivot-RP's User Interface](#).

You add, edit, publish, un-publish, and delete newsletters on the Manage Newsletters page (**Admin > Tools > Newsletters > Manage Newsletters**).

The screenshot displays the 'Manage Newsletters' interface. At the top, there are navigation tabs: Reports, Institutional Settings, Groups, Education & Training, Statistics, Tools, and Manage Gallery. Below the tabs, the page title is 'Manage Newsletters' with a 'Create a Newsletter' button. The main content area is divided into two sections: 'All Your Newsletters (1)' and 'All Institution Newsletters (47)'. The 'All Your Newsletters' section shows a table with columns for 'Last Edited', 'Last Sent Date', 'Next Send Date', and 'Recipients'. The entry 'Sample Newsletter Test' is listed as 'Unpublished' with 0 recipients. The 'All Institution Newsletters' section shows a list of newsletters with details such as 'Testing Newsletter Delivery' (repeats once on 09 Feb 2024 at 9:00PM GMT, owned by Laughlin, Airaka), 'Lita's Test Newsletter' (repeats once on 10 Apr 2019 at 12 noon GMT, owned by Kearney, Lita & Schneider, Deborah), and 'Bioinformatics' (repeats weekly on Saturday at 12 noon GMT, owned by Branch, Sara).

Creating and Sending (Publishing) Newsletters

You can create a newsletter from scratch or copy an existing newsletter.

To create and publish a newsletter:

1. If you intend to share a list of funding opportunities in the newsletter, either ensure that another admin has created the list or create the list yourself. See the following sections for more information.
 - Internal funding opportunities – See [Managing Internal Funding Opportunities](#).
 - Curated search (a dynamic list of opportunities) – See [Creating Curated Lists of Funding Opportunities](#).
 - Curated list of opportunities (static) – See [Creating Curated Lists of Funding Opportunities](#).
2. On the Manage Newsletter page, select **Create a Newsletter**. You can also select **Admin > Tools > Newsletters > Create a Newsletter** in the Admin dashboard. The Create a Newsletter page appears.

Reports Institutional Settings Groups Education & Training Statistics Tools

Create a Newsletter

Use this form to create a newsletter to send to a Group. [Manage Newsletters](#)

Step 1: Name Your Newsletter

General Name 1

Step 2: Choose Funding Opps to Share

Select type Total Opps: 0

Pick the Sort Order for Results Display

Title
 Funder name
 Deadline soonest > latest
 Amount highest > lowest
 Last Published most recent > oldest

Step 3: Add a Heading & Custom Message

Enter a subject heading (e.g. September Funding Opps Curated by your Office of Research...)

Enter message text here...

0 of 16000 characters

[Send Preview Email](#)

Step 4: Choose a Group of Recipients

send to all my registered Pivot-RP users
 send to groups...

Step 5: Schedule Your Message

repeating

Time AM PM

Send on mm/dd/yyyy

Scheduled newsletters are sent in batches twice daily. Delivery times vary based on multiple factors such as internet traffic and local email clients.
Sending "AM" will send approximately 12 noon GMT (7am ET). Sending "PM" will send approximately 9:00PM GMT (4pm ET).

Step 6: Add Co-owners (optional)

Co-owners: (1)

Make newsletter actively published
 Save newsletter as a draft only

Your newsletter will not be sent out until you choose to publish it.

[Save Draft](#) [Cancel Edit](#)

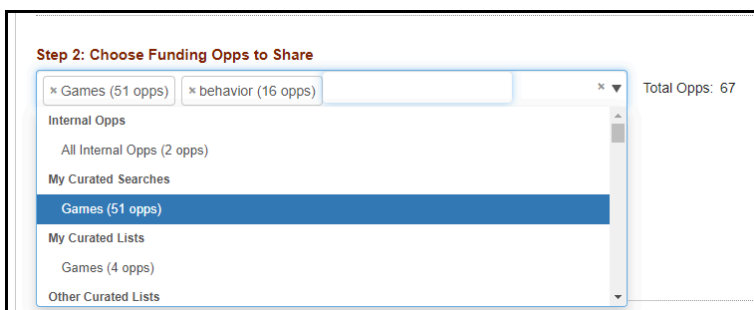
Create a Newsletter

3. Configure the following fields, following the on-screen direction where available. All fields are optional, except for **Name Your Newsletter**.

- **Name Your Newsletter** (mandatory) – The name does not have to be unique, but it is suggested that you use a unique name for each newsletter.

At any time after entering a newsletter name you can select **Send Preview Email** to send the newsletter as it currently is directly to your own email address.

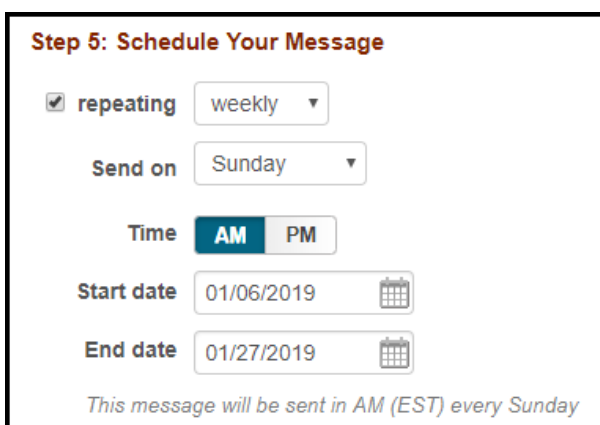
- **Choose Funding Opps to Share** – Select one or more lists of funding opportunities. To remove one of the selected lists, select **X** in the list name or select the list again in the drop-down menu. When selected, the funding opportunities associated with all of the selected lists appear in the email.



Choose Funding Opps to Share

In **Pick the Sort Order for Results Display**, select the order in which you want the funding opportunities to appear in the newsletter: by title, by sponsor name, by deadline, or by funding amount.

- **Add a Heading & Custom Message** – For more information, see [Using the Content Editor](#).
- **Choose a Group of Recipients** – If you select to send to groups, you can select multiple groups to which to send the newsletter. Groups must already be defined. You can view the list of recipients after selecting the group.
- **Schedule Your Message** – Select **repeating** if you want the newsletter to be sent periodically (more than one time). To send the newsletter only once, leave this field clear.



Schedule Your Message – Repeating Weekly

- If you are sending the newsletter only once, leave the **Send on** field empty to send the newsletter immediately after it is published. To schedule the newsletter to be sent on a specific date, select **AM** or **PM** and enter the date in **Send on**.
- If you are sending the newsletter periodically, select whether to send it weekly or monthly, the day of the

week, and the week of the month (if sending monthly). Select **AM** or **PM** for the selected day and enter the start and end dates. Note that you can edit the newsletter in between each of the times that it is sent.

- **Add Co-owners** – You can add one or more co-owners to a newsletter. Select additional owners from a list of colleagues at your institution, who have the administrative rights to manage newsletters. Co-owners will have the same full editing privileges that you have, including the ability to delete the newsletter or to remove you as an owner.

4. When you are done, you can save the newsletter in draft status or publish the newsletter. To save as a draft, select **Save newsletter as a draft only** and select **Save Draft**.

To publish the newsletter, select **Make newsletter actively published** and select **Publish**. If the newsletter is scheduled for a specific date, or to begin on a specific start date, it will be sent on the data you selected. Otherwise, the newsletter is sent immediately.

A newsletter looks something like the following to the recipient:

Re: Test descriptions

Lita
To: Eddie
Tue 11/2/2021 1:07 PM

You replied to this message on 11/2/2021 1:17 PM.

ExLibris | Pivot-RP
Powered by Pivot and Research Professional

Funding News for Eddie
how does this look?

Artificial Intelligence		
22 Opportunities	Deadline	Amount
ACM/AAAI Allen Newell Award Association for Computing Machinery (ACM)	15 Jan 2022 Nomination Anticipated	\$10,000USD
The Association for Computing Machinery, with funding from the Association for the Advancement of Artificial Intelligence, invites nominations for the Allen Newell award. This recognizes an individual for career contributions in computer science, or work that bridges computer science and other...		
Analytic imaging diagnostic arena clinical evaluation funding Medtech4Health	31 Jan 2022 Application Anticipated	see record
This supports clinical evaluation of commercially available artificial intelligence solutions in healthcare within AIDA's scope of imaging diagnostic. The total budget is worth SEK 1 million and grants may cover up to 50 per cent of project costs.		
Artificial Intelligence in Health and Care Award National Institute for Health Research (NIHR); Department of Health and Social Care (DHSC) - United Kingdom, United Kingdom Government	06 Sep 2021 Stage 1 Application Anticipated	£150,000GBP
The Artificial Intelligence (AI) Award is run by the Accelerated Access Collaborative (AAC) in partnership with NHSX and the National Institute for Health Research (NIHR). It will make £140 million available over three years to accelerate the testing and evaluation of the most promising AI...		

Pivot-RP-PP newsletters are personalized with the recipient's name if the recipient has a Pivot-RP-PP user account. Additional text and images may be included in addition to funding opportunities.

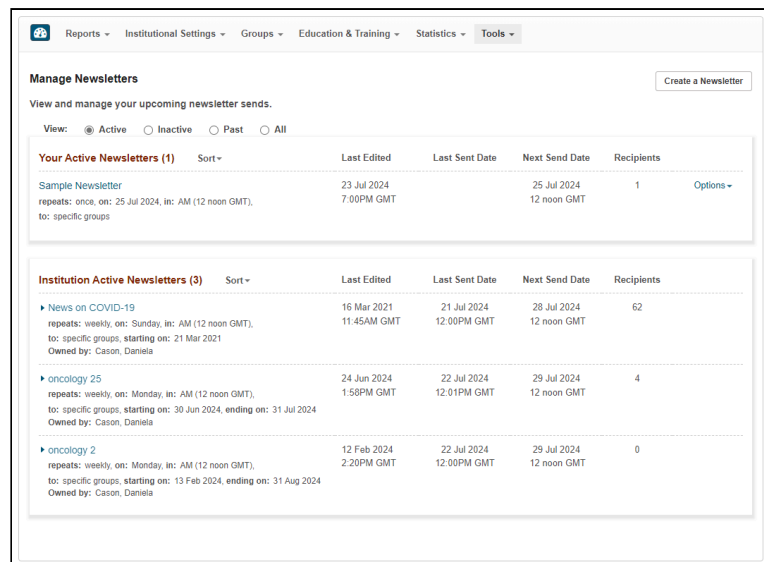
To copy a newsletter:

Select **Options > Copy** in the newsletter's row and select **Yes** in the confirmation dialog box. You are redirected to the Edit Newsletter page, which is the same as the Create a Newsletter page, described above.

Managing Newsletters

To view information about a published newsletter's history and recipients:

On the Manage Newsletters page, select the small right-pointing arrow to the left of the newsletter's name in the newsletter's row. Additional information about the newsletter appears in the newsletter's row. Note that every time a newsletter is sent you receive an email with this information.



The screenshot shows the 'Manage Newsletters' interface. At the top, there are navigation tabs: Reports, Institutional Settings, Groups, Education & Training, Statistics, and Tools. Below the tabs, the page title is 'Manage Newsletters' with a 'Create a Newsletter' button. The main content area is titled 'View and manage your upcoming newsletter sends.' and includes radio buttons for 'View: Active', 'Inactive', 'Past', and 'All'. There are two tables of newsletters. The first table, 'Your Active Newsletters (1)', has one row for 'Sample Newsletter' with details on its schedule and recipients. The second table, 'Institution Active Newsletters (3)', has three rows for newsletters like 'News on COVID-19', 'oncology 25', and 'oncology 2', each with detailed scheduling and ownership information.

Your Active Newsletters (1)					
	Last Edited	Last Sent Date	Next Send Date	Recipients	
Sample Newsletter repeats: once, on: 25 Jul 2024, in: AM (12 noon GMT), to: specific groups	23 Jul 2024 7:00PM GMT		25 Jul 2024 12 noon GMT	1	Options ▾

Institution Active Newsletters (3)					
	Last Edited	Last Sent Date	Next Send Date	Recipients	
News on COVID-19 repeats: weekly, on: Sunday, in: AM (12 noon GMT), to: specific groups, starting on: 21 Mar 2021 Owned by: Cason, Daniela	16 Mar 2021 11:45AM GMT	21 Jul 2024 12:00PM GMT	28 Jul 2024 12 noon GMT	62	
oncology 25 repeats: weekly, on: Monday, in: AM (12 noon GMT), to: specific groups, starting on: 30 Jun 2024, ending on: 31 Jul 2024 Owned by: Cason, Daniela	24 Jun 2024 1:58PM GMT	22 Jul 2024 12:01PM GMT	29 Jul 2024 12 noon GMT	4	
oncology 2 repeats: weekly, on: Monday, in: AM (12 noon GMT), to: specific groups, starting on: 13 Feb 2024, ending on: 31 Aug 2024 Owned by: Cason, Daniela	12 Feb 2024 2:20PM GMT	22 Jul 2024 12:00PM GMT	29 Jul 2024 12 noon GMT	0	

Newsletter Additional Information

To edit a newsletter or publish a newsletter that is in draft status:

On the Manage Newsletters page, select the newsletter's name in the newsletter's row. The Edit Newsletter page appears. Follow the instructions above for creating a newsletter.

To copy a newsletter:

Select **Options > Copy** in the newsletter's row and select **Yes** in the confirmation dialog box to edit a copy of the newsletter on the Edit Newsletter page.

To un-publish a newsletter:

Select **Options > Unpublish** in the newsletter's row and select **Yes** in the confirmation dialog box.

To delete a newsletter:

Select **Options > Delete** in the newsletter's row and select **Yes** in the confirmation dialog box.