

## Configuring Institution Settings

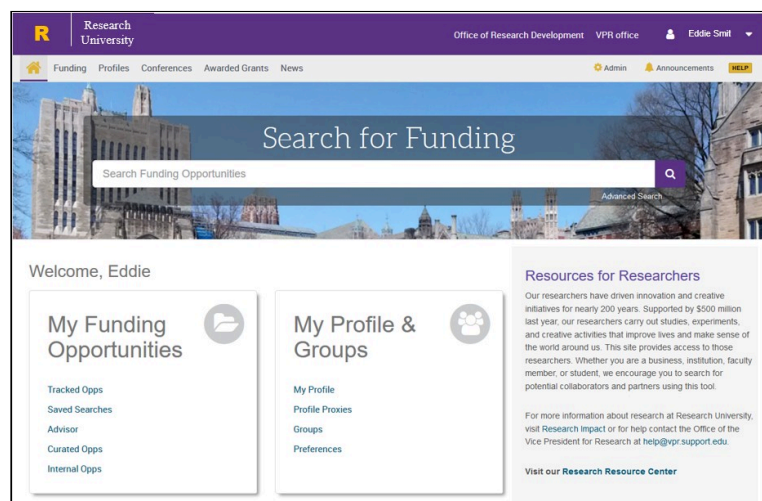
This page is intended only for users who have administrative permissions.

## Customizing the Pivot-RP User Interface

On the Custom Branding page ([Admin > Institutional Settings > Custom Branding](#)), you can add a main logo for the UI, [newsletters](#), and funding alert emails. You can also change the colors of the primary navigation header bar in the UI and add a background image. Colors for highlights for internal and limited submission opportunities can also be modified. Changes you make while configuring branding are reflected in your current session in the UI. However, these changes do not appear to other users until you save them.

Please view our [Custom Branding Guide](#) for extensive information on what is customizable and how to customize the UI.

In the following figure, you can see the logo in the top left, the primary color used in the navigation bar, and the secondary color used for the number of announcements and the Help link on the top right. You can add additional custom links in the header. The right hand panel is completely customizable with your own content. Modify the text, colors, images, and links to promote your research office, resources, contacts and/or provide additional guidance for your users.



### Custom Branding

#### Custom branding for email alerts and newsletters:

Using the Custom Branding page (see branding guide linked above), you may also add branding for the weekly email alerts that your users see as well as newsletters that you choose to send.

If you may add an additional *optional* custom logo for weekly email alerts and/or an optional custom logo for newsletters. This would be used if there was a reason you wanted different branding for email alerts and newsletters. If you do not add a custom logo for alerts and newsletters, these emails will automatically use the primary logo and header colors you choose for the home dashboard page. For most cases this will be the best choice.

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5 Results	Deadline	Amount
<b>Cyber-Physical Systems (CPS)</b> National Science Foundation (NSF)	June 22, 2020 Full Proposal Confirmed	<a href="#">see record</a>
<b>new DoD Prostate Cancer, Population Science and Outcomes Research Award</b> United States Department of Defense (DOD) Department of the Army U.S. Army Medical Research and Materiel Command (USAMRMC)	June 25, 2020 Pre-Application Confirmed	<a href="#">see record</a>

## Email alert

## Configuring Institution Search Settings

On the Search Settings page ([Admin > Institutional Settings > Search Settings](#)), you can set the default Applicant/Institution Location, Activity Location and Citizenship settings for all user searches in your institution. When users search for funding opportunities, the locations and citizenship requirements you select on this page are selected by default. Users can still change or clear these selections when performing searches.

In addition, you can set the default currency displayed in the Browse by Keyword wheel on the Funding Discovery page. The default setting is **USD**.

## Search Settings

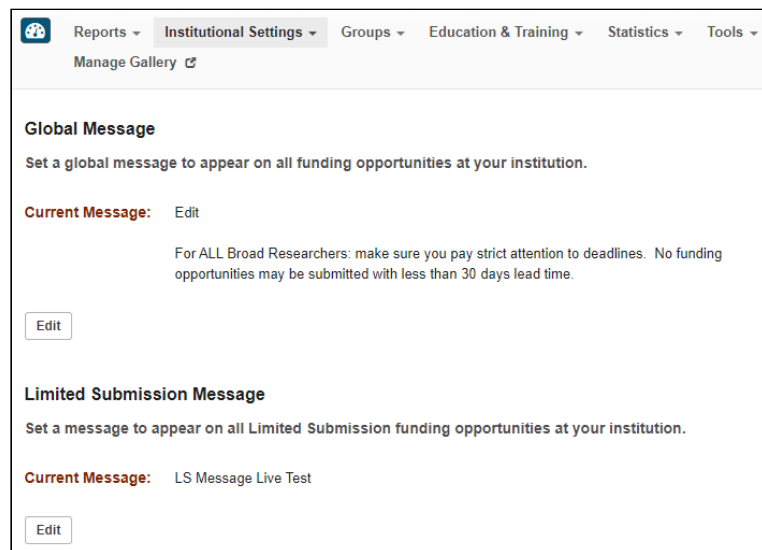
To change a default location or citizenship, select **Edit**, enter or select/clear the locations, and select **Save**.

To change the default currency, select one of the following currencies: USD, EUR, GBP, or AUD.

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## Managing Global Messages

The Global Messages page ([Admin > Institutional Settings > Global Message](#)) allows you to create global and limited submission messages.



The screenshot shows the 'Global Message' page within a web application. At the top, there is a navigation bar with tabs for 'Reports', 'Institutional Settings', 'Groups', 'Education & Training', 'Statistics', and 'Tools'. Below the navigation bar is a 'Manage Gallery' link. The main content area is titled 'Global Message' and contains the following text: 'Set a global message to appear on all funding opportunities at your institution.' Below this, there is a section for the 'Current Message' with an 'Edit' link. The message text reads: 'For ALL Broad Researchers: make sure you pay strict attention to deadlines. No funding opportunities may be submitted with less than 30 days lead time.' There is another 'Edit' button below the message text. Below this section is a section for the 'Limited Submission Message' with the text: 'Set a message to appear on all Limited Submission funding opportunities at your institution.' Below this, there is a 'Current Message' section with the text 'LS Message Live Test' and an 'Edit' button.

### Global Messages Page

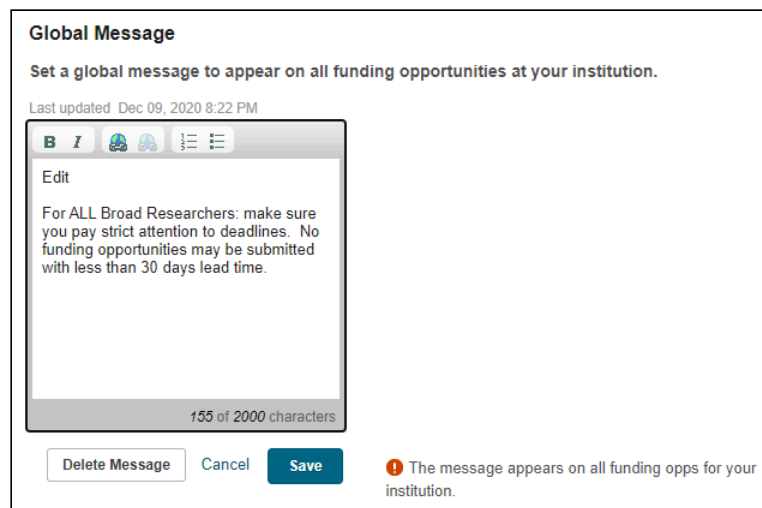
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## Updating the Global Message

The Global Message section allows you to add, edit, or delete a global message that appears on all funding opportunities for your institution.

**To modify the global message that appears on all funding opportunities:**

1. Open the Global Messages page ([Admin > Institutional Settings > Global Message](#)).
2. In the Global Message section, select **Edit** to open the message editor.



The screenshot shows the 'Global Message Editor' interface. At the top, it is titled 'Global Message' and contains the text: 'Set a global message to appear on all funding opportunities at your institution.' Below this, there is a timestamp: 'Last updated Dec 09, 2020 8:22 PM'. The main editing area is a rich text editor with a toolbar containing icons for bold, italic, link, unlink, list, and table. The text in the editor reads: 'Edit' followed by 'For ALL Broad Researchers: make sure you pay strict attention to deadlines. No funding opportunities may be submitted with less than 30 days lead time.' Below the text area, there is a character count: '155 of 2000 characters'. At the bottom of the editor, there are three buttons: 'Delete Message', 'Cancel', and 'Save'. To the right of the 'Save' button, there is a warning icon and the text: 'The message appears on all funding opps for your institution.'

### Global Message Editor

3. Modify your message. You can use the editor's toolbar to add boldface, italics, links, and bulleted and numbered lists. A maximum of 2000 characters is permitted in the message.

If you want to delete the message entirely, select **Delete Message**.

4. Select **Save** to save your changes to the message.

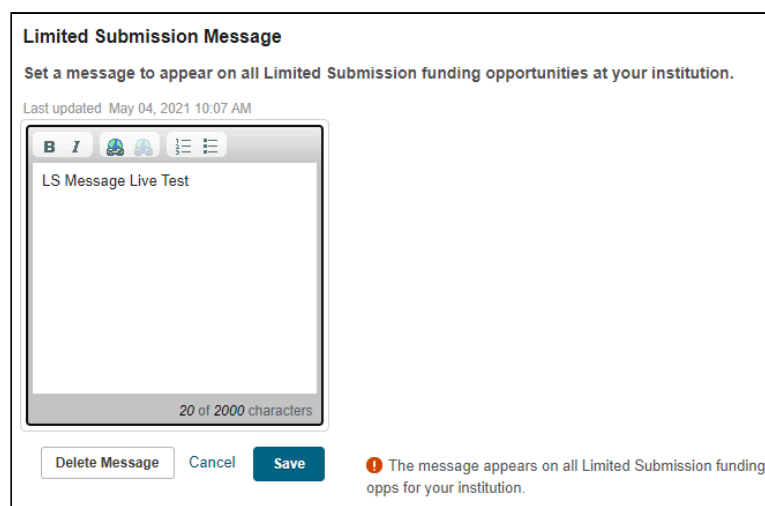
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## Creating a Limited Submission Message

The Limited Submission Message section allows you to add, edit, or delete a message that appears on all limited submission funding opportunities for your institution.

**To modify the global message that appears on all funding opportunities:**

1. Open the Global Messages page ([Admin > Institutional Settings > Global Message](#)).
2. In the Limited Submission Message section, select **Edit** to open the message editor.



The screenshot shows the 'Limited Submission Message' editor. At the top, it says 'Set a message to appear on all Limited Submission funding opportunities at your institution.' Below this, it indicates 'Last updated May 04, 2021 10:07 AM'. The main area is a rich text editor with a toolbar containing icons for bold, italic, link, unlink, bulleted list, and numbered list. The text inside the editor reads 'LS Message Live Test'. At the bottom of the editor, it shows '20 of 2000 characters'. Below the editor are three buttons: 'Delete Message', 'Cancel', and 'Save'. To the right of the buttons is a red warning icon and the text: 'The message appears on all Limited Submission funding opps for your institution.'

### Limited Submission Message Editor

3. Modify your message. You can use the editor's toolbar to add boldface, italics, links, and bulleted and numbered lists. A maximum of 2000 characters is permitted in the message.

If you want to delete the message entirely, select **Delete Message**.

4. Select **Save** to save your changes to the message.

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## Creating Site Announcements

Announcements are seen by all users at your institution. They can be used to notify users about events or important information such as training or help.

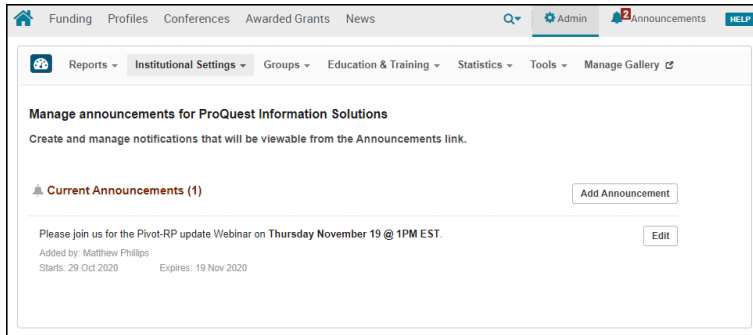
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### Note

The Pivot-RP development team occasionally adds announcements about new features and release that are visible to all administrators at all institutions. These announcements are not visible to non-administrator users.

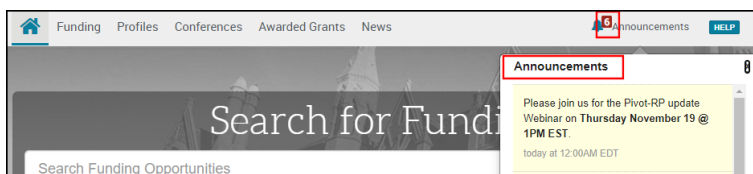
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You add, edit, or delete announcements on the Manage Announcements page ([Admin > Institutional Settings > Announcements](#)).



## Manage Announcements

Announcements appear in a popup when a user selects **Announcements** in the Top Navigation area.



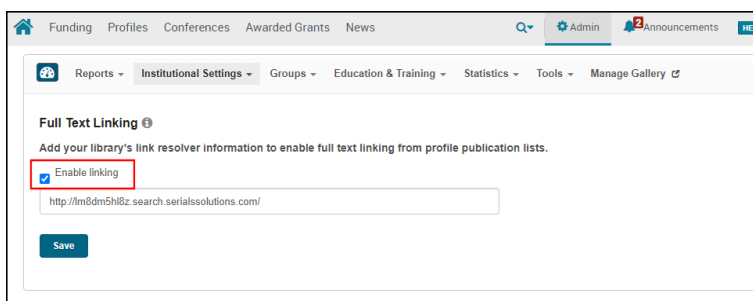
## Home Page with Announcements

To delete an announcement, select **Edit** in the announcement's row, select **Delete Announcement**, and select **Save**.

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## Configuring Full Text Linking

Your library can configure a link to appear that must be clicked to access the full text of an article. To configure this, select the **Enable linking** checkbox and enter your library's unique OpenURL link resolver base URL. If you do not know this URL, ask your library for assistance.



## Configuring Full Text Linking

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### Note

Configuring full text linking requires the **Manage Full Text URLs** privilege.

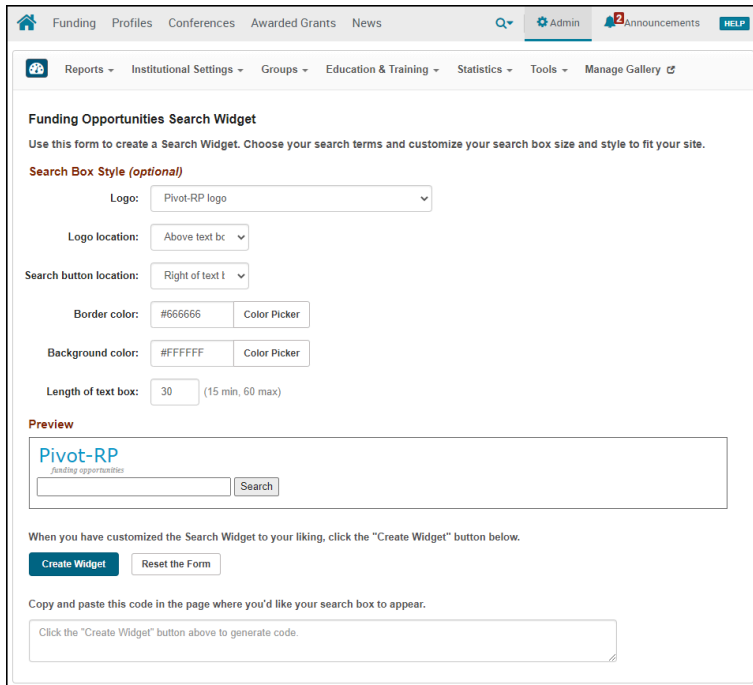
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## Adding a Funding Opportunity Search Widget to Your Website

You can create a widget to add to your website. The widget displays a search field that your site visitors can use to search Pivot-RP for funding opportunities. After they select **Search** in the widget, they are directed to a search results page on Pivot.

You create this widget on the Funding Opportunities Search Widget page ([Admin > Tools > Widgets > Funding Opportunities Search Widget](#)).



The screenshot shows the 'Funding Opportunities Search Widget' configuration page. At the top, there are navigation tabs: Funding, Profiles, Conferences, Awarded Grants, News, Admin, Announcements, and HELP. Below the navigation is a menu with options: Reports, Institutional Settings, Groups, Education & Training, Statistics, Tools, and Manage Gallery. The main content area is titled 'Funding Opportunities Search Widget' and includes instructions: 'Use this form to create a Search Widget. Choose your search terms and customize your search box size and style to fit your site.' Under 'Search Box Style (optional)', there are several settings: 'Logo' (set to 'Pivot-RP logo'), 'Logo location' (set to 'Above text bc'), 'Search button location' (set to 'Right of text l'), 'Border color' (set to '#666666'), 'Background color' (set to '#FFFFFF'), and 'Length of text box' (set to '30'). A 'Preview' section shows a search box with the 'Pivot-RP' logo and a 'Search' button. Below the preview, there are 'Create Widget' and 'Reset the Form' buttons. At the bottom, there is a text area for pasting code, with a note: 'Click the "Create Widget" button above to generate code.'

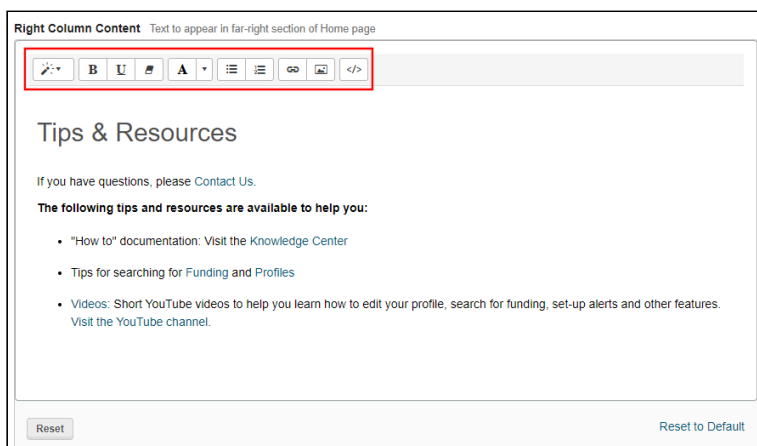
### Funding Opportunities Search Widget

Follow the on-screen text to customize the widget. A preview of the widget appears on the site. When you are finished customizing the widget, select **Create Widget** and copy the code that appears in the box to your website.

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## Using the Content Editor











The Content Editor appears on the following pages: Custom Branding (right-column content on Home page) and Newsletters.



The screenshot shows the 'Right Column Content' editor. At the top, there is a title 'Right Column Content' and a subtitle 'Text to appear in far-right section of Home page'. Below the title is a rich text editor toolbar with icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and source code. The main content area contains the following text: 'Tips & Resources', 'If you have questions, please [Contact Us](#).', 'The following tips and resources are available to help you:', and a bulleted list: '• "How to" documentation: Visit the [Knowledge Center](#)', '• Tips for searching for [Funding](#) and [Profiles](#)', and '• Videos: Short YouTube videos to help you learn how to edit your profile, search for funding, set-up alerts and other features. Visit the [YouTube channel](#).' At the bottom, there are 'Reset' and 'Reset to Default' buttons.

## Content Editor on Custom Branding Page

It allows you to update the content of the associated pages using the following editor options:

Editor Option	Description
	The Style option allows you to apply an HTML style to a paragraph.
	The Bold option (CNTL+b) allows you to apply boldface to highlighted text.
	The Underline option (CNTL+u) allow you to underline highlighted text.
	The Remove Font Style option (CNTL+) allows you to remove character styles (such as boldface, underline, and foreground color) applied to highlighted text.
	The Foreground Color option allows you change the color of highlighted text.
	The Unordered List option (CNTL+SHIFT+NUM7) allows you to create a bulleted list
	The Ordered List option (CNTL+SHIFT+NUM8) allows you to create an ordered list.
	The Link option (CNTL+k) allow you to add a link to the specified paragraph.
	The Picture option allows you to add an image to the specified paragraph.
	The Code View option allows you to edit the HTML source of the content that you are editing directly.