Pivot-RP Overview and essential Upgrade Information

Pivot-RP is an enhanced user interface for the same research funding opportunities found in Research Professional, offering more features, customization, and functionality.

Key differences include:

- Customizable UI to align with institutional branding, including weekly email alerts.
- Searches can be narrowed down by a faceted navigation sidebar
- Flag limited submission opportunities and add global messages to calls for your users to see.
- Automated alerts and calendar reminders for tracked opportunities.
- Ability to add internal funding opportunities.
- Researcher profiles with ORCID integration, offering personalized funding recommendations.
- Expanded search and data for awarded grants.
- Private workgroups for users.
- Recurring newsletters to send relevant funding to targeted groups
- Advanced administrator reports.
- Modern, accessibility first design that works across all devices.

Cost Implications of Moving to Pivot-RP

There are no additional costs to upgrade from Research Professional (RP) to Pivot-RP. Your current RP license terms remain unchanged.

Continued Use of Research Professional

Research Professional is still available and provides the same funding content as Pivot-RP, and there are no implications for continuing with RP currently. However, all new features and enhancements will be added only to Pivot-RP. Users can trial and run Pivot-RP alongside RP and decide when to upgrade. Service and support are the same for both, but a full transition to Pivot-RP is recommended due to its enhanced capabilities and positive user feedback.

Setting up a Pivot-RP Trial

We are currently offering 4-months free trial access to Pivot-RP. If you are interested, please get in touch with the GoPivot Team.

Trial and Upgrade Process

During the trial you will have access to all functionalities of Pivot-RP, and you can customize and configure the site for your institution. When ready, this trial site becomes your live Pivot-RP site—no data or setup is lost. Your Research Professional service can remain live and running in parallel for your users for an extended period after you decide to go live with Pivot-RP. This will allow you the opportunity to educate users about Pivot-RP and to let them know that Research Professional will be switched off. We recommend no more than 60 days between Pivot-RP going live at your institution and turning off your RP access.

Step-by-step process and timeline for upgrading to Pivot-RP

1. **Setting up your trial**
   After contacting the GoPivot Team, they will share a trial agreement letter for you to sign (referencing our DPA) and request that you provide contact details for any administrators you would like to have accounts added for during your trial.

2. **Testing out Pivot-RP**
   During your trial period, the team will offer an administrator training session to demonstrate all the essential and additional features available to you. We specifically recommend that you test out the following **essential features:**

   - **Customise the Interface** – add your institutional logo and colours to allow Pivot-RP to look like a part of your institutional websites
   - **Pivot-RP Profiles** – create your Profile and sign op to Advisor alerts to receive recommended funding opportunities based on your Profile information
   - **Groups** – create public groups for your faculties, departments, research groups to be able to share funding opportunities directly to members
   - **Curated Searches and Lists** – create curated searches and lists of selected funding opportunities to be able to share them with your users
   - **Newsletters** – create a reoccurring newsletter containing funding information and assign it to a group
   - **Embedded Searches** – crate a curated search and embed it in your own websites or Sharepoint to advertise funding opportunities to your researchers outside of Pivot-RP
   - **Internal Funding** – add your own funding opportunities to the Pivot-RP funding database for your institution

3. **Confirming Pivot-RP Upgrade**

   SSO: After you have confirmed you would like to go ahead with the upgrade, we can offer to enable SSO access for your institution. You will need to get someone from your IT team involved to work on the configuration with our Development team. The GoPivot team will share a list of information that we will need from you and that your IT will need from us for the configuration. This process usually takes 2-3 weeks.

   Profiles: at this point we can also offer to create Profiles for your researchers. Please note that Profiles are different to user accounts. Your researchers will still have to create their own user accounts but will then be able to claim the Profile that our Content team have created for them. You can find more information in our **Profiles FAQ.** This process may take up to 8 weeks.

4. **Launching Pivot-RP**
   When you are ready to start promoting Pivot-RP to your researchers, we will offer to deliver a training session to your academics to show them how to navigate the new interface, including setting up an account, claiming Profile, creating searches and signing up to email alerts.

5. **Turning off Research Professional**
   After launching Pivot-RP and promoting the platform internally, you should decide on a date where your RP access will be turned off. At this point, you will be asked to sign an

addendum to your trial letter confirming the official date. At your next renewal, you would be asked to sign a Pivot-RP contract.

Important to note

1. **Transferring of data from Research Professional to Pivot-RP**
   User accounts and saved searches from Research Professional do not transfer to Pivot-RP and users will need to create new accounts. This ensures compliance with data protection practices, as users must provide consent, claim their profile, and acknowledge privacy policies. Saved searches are also not transferred as search functionality differs between the platforms, so copying searches would produce limited or inaccurate results. Creating new saved searches in Pivot-RP is quick and helps users learn the improved features. Additionally, this transition gives research offices a valuable opportunity to re-engage users and highlight the enhanced capabilities of Pivot-RP.

2. **Research Professional News**
   There is no change to content—Research Professional News, including Research Fortnight, Research Europe, and news alerts, remains fully available to subscribers. In Pivot-RP, news content opens in a new browser tab via the **News tab** in the top menu or directly at researchprofessionalnews.com.

   Users may be prompted to confirm authentication when accessing full-text articles, depending on how they enter the site. Pivot-RP provides a modern interface while maintaining full access to all existing news content.

Further information about Pivot-RP:

Pivot-RP URL

Product Documentation

Training videos

Webinars and Release Notes

Contact Support