



# Pivot

## Release Notes

**June 2019**

# What's New – June 2019




## ✓ Public Groups

### Overview & Benefits

- Pivot Administrators can create groups that are visible to your whole institution; Groups can be based on research interest, topical area, or any criteria
- Groups can be set up to bring visibility to institution-wide initiatives, centers or focus areas
- Users can self-subscribe to groups to get group-specific opportunities, alerts, and other communications
- Groups can be managed by any designated user (does not have to be a Pivot Admin)



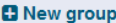
# New: Now two types of Groups

## Manage Groups

 **Personal groups you've created for sharing**  

<a href="#">▶ Biology test group (25 members)</a>	<a href="#">make public</a>	<a href="#">copy</a>	<a href="#">edit</a>	<a href="#">delete</a>
<a href="#">▶ eddie test newsletters (4 members)</a> This is a group used to test newsletters	<a href="#">make public</a>	<a href="#">copy</a>	<a href="#">edit</a>	<a href="#">delete</a>

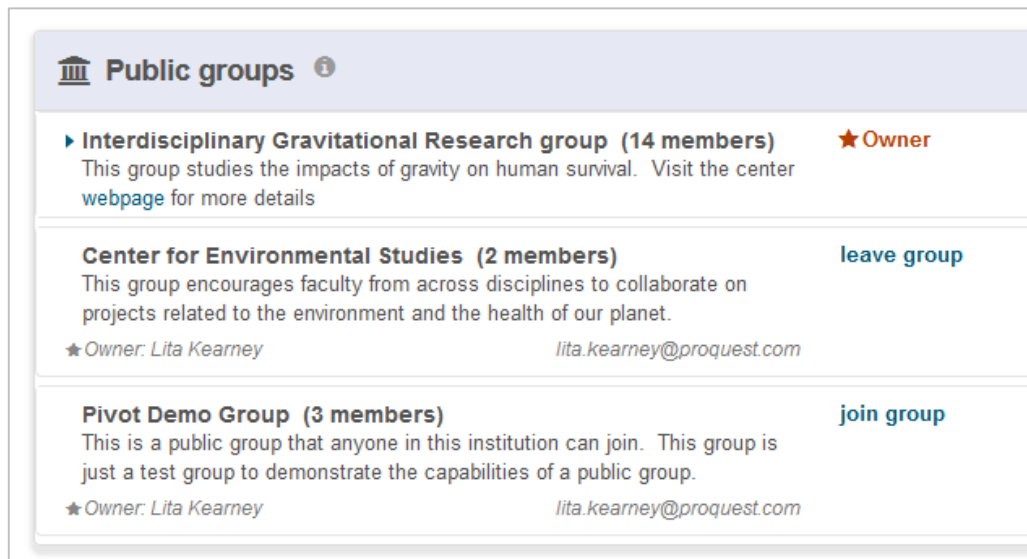
**Personal Groups:**  
visible only to the  
user who creates  
them

 **Public groups**  

<a href="#">▶ Interdisciplinary Gravitational Research group (3 members)</a> This group studies the impacts of gravity on human survival.	<b>★ Owner</b>	<a href="#">copy</a>	<a href="#">edit</a>	<a href="#">delete</a>
<b>Center for Environmental Studies (2 members)</b> This group encourages faculty from across disciplines to collaborate on projects related to the environment and the health of our planet. ★ Owner: <i>Lita Kearney</i> <a href="mailto:lita.kearney@proquest.com">lita.kearney@proquest.com</a>	<a href="#">leave group</a>			
<b>Pivot Demo Group (3 members)</b> This is a public group that anyone in this institution can join. This group is just a test group to demonstrate the capabilities of a public group. ★ Owner: <i>Lita Kearney</i> <a href="mailto:lita.kearney@proquest.com">lita.kearney@proquest.com</a>	<a href="#">join group</a>			

**Public Groups:**  
visible to all users  
at your institution

# What's a Public Group?



**Public groups** ⓘ

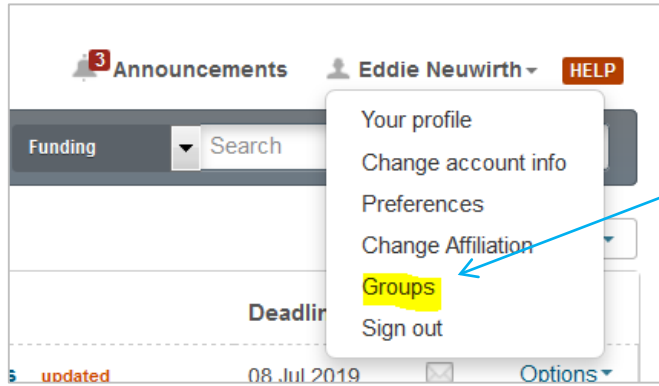
- Interdisciplinary Gravitational Research group (14 members)** ★ Owner  
This group studies the impacts of gravity on human survival. Visit the [center webpage](#) for more details
- Center for Environmental Studies (2 members)** leave group  
This group encourages faculty from across disciplines to collaborate on projects related to the environment and the health of our planet.  
★ Owner: *Lita Kearney* [lita.kearney@proquest.com](mailto:lita.kearney@proquest.com)
- Pivot Demo Group (3 members)** join group  
This is a public group that anyone in this institution can join. This group is just a test group to demonstrate the capabilities of a public group.  
★ Owner: *Lita Kearney* [lita.kearney@proquest.com](mailto:lita.kearney@proquest.com)

Public Groups enable users to find and join groups of interest (self-subscribe) to share and receive updates, news and more

Pivot administrators can create groups to share funding opportunities and other communications targeted to specific sets of users

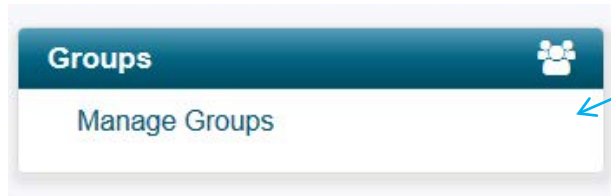
Anyone designated a group administrator can manage groups once they have been created

# Where to find and access Groups



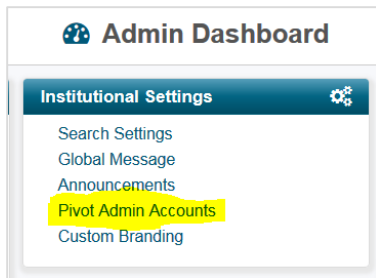
Click **“Groups”** on the pull-down menu under your name

Or



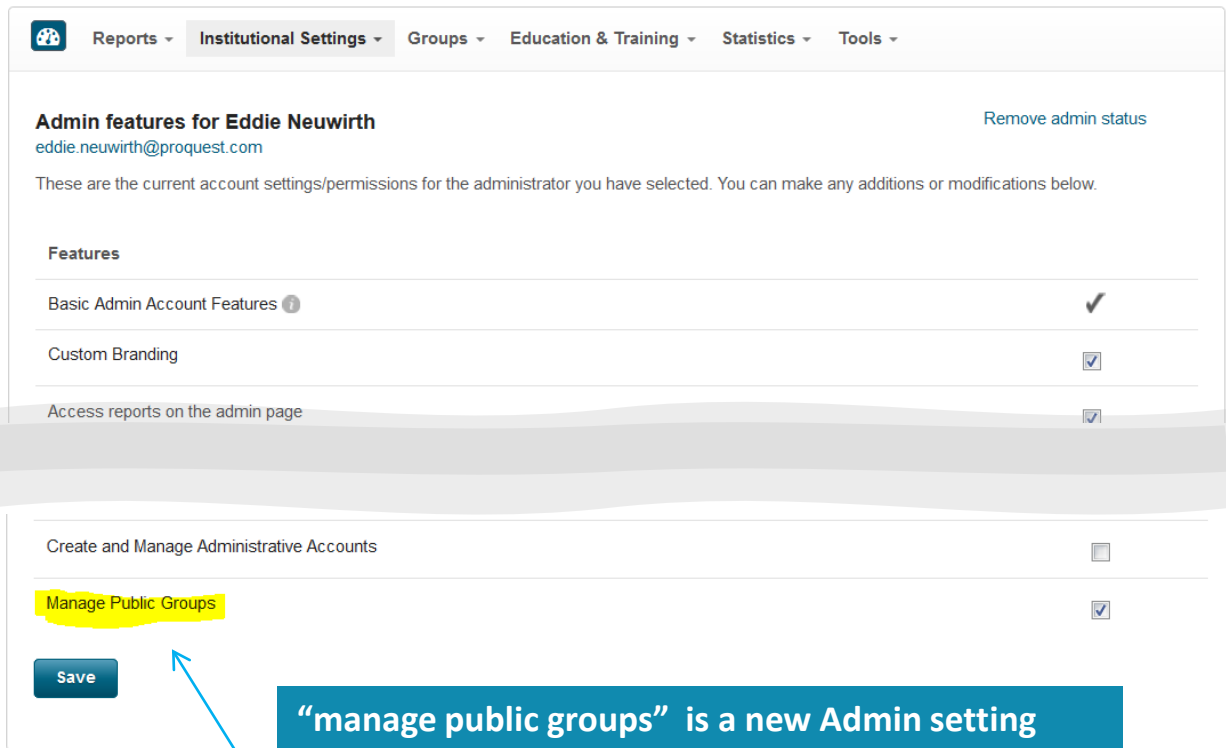
Administrators can also access groups from the Admin Dashboard **“Manage Groups”** link

# Who can create Public Groups?



**Only Pivot administrators who have “manage public groups” privileges can create new Public Groups.**

However, once a group has been created **any user** (even non-Pivot Admins) can be given privileges to manage groups.



**This must be selected for a user to be able to create new public groups**

# Public Group Roles – Managing Groups

## Manage Groups

The screenshot shows a 'Manage Groups' interface with two sections: 'Personal groups' and 'Public groups'. The 'Public groups' section lists three groups: 'Biology test group (25 members)', 'eddie test newsletters (4 members)', and 'Interdisciplinary Gravitation'. Below these is a 'Center for Environmental' group and a 'Pivot Demo Group (3 members)'. A modal window titled 'Public Groups' is overlaid, explaining that public groups are created by Pivot administrators and anyone can join. It lists three roles: Owner, Administrator, and Member, each with a description of their capabilities. The email address [lita.kearney@proquest.com](mailto:lita.kearney@proquest.com) is visible at the bottom of the modal.

**Public Groups**

Public groups are created by Pivot administrators at your institution. Anyone can join a public group to receive funding alerts and communications that are shared with that group. You can remove yourself from a group at any time. Owners and Administrators of groups can add and delete members.

Members of public groups have one of the following roles:

- **Owner:** Can add and delete group members and can promote others to be administrators of the group. Owners can share funding opportunities and other communications.
- **Administrators:** Can add and delete group members. Administrators can share funding opportunities and other communications.
- **Members:** Will receive all funding alerts and communications shared with the group. Members can add or remove themselves from the group.

[lita.kearney@proquest.com](mailto:lita.kearney@proquest.com)

Groups members can have 1 of 3 roles:

**Owners** – The creator of the group is automatically the owner. Owners can add and delete members and can assign group administrators.

**Group Administrators** – any member of a group can be made a group administrator which means they can add and delete members and share content with the group.

**Members** – are users who will be receive shared opportunities, alerts, communications, etc.

# Managing group members and privileges

Only Owners and Group Administrators can share content with a group

**Owners** – can make any group member a group administrator

**Group Administrators** –

- Can view all the members of group
- Can add or delete members from the group
- Can share content with the group

**Public groups** + New group

**Interdisciplinary Gravitational Research group (14 members)** ★ Owner copy edit delete

This group studies the impacts of gravity on human survival. Visit the center webpage for more details

★ Owner: Eddie Neuwirth *eddie.neuwirth@proquest.com*

1 Allen, Amanda	<i>amanda.allen@proquest.com</i>	make group admin	delete
★ 2 Hagala, Richard	<i>richard.hagala@refworks-cos.com</i>	remove group admin	delete
3 High, Jason S.	<i>jason.high@proquest.com</i>		delete
4 Johnson, Gregory	<i>gregory.johnson@proquest.com</i>	make group admin	delete
5 Johnson, Phyllis L.	<i>phyllis.johnson@proquest.com</i>	make group admin	delete
★ 6 Jones, Keith	<i>keith.jones@proquest.com</i>	remove group admin	delete
7 Kearney, Lita A.	<i>lita.kearney@proquest.com</i>	make group admin	delete
8 Mandley, Jane K.	<i>jane.mandley@proquest.com</i>	make group admin	delete
★ 9 Neuwirth, Eddie	<i>eddie.neuwirth@proquest.com</i>		delete
10 Obaid, Anas	<i>anas.obaid@proquest.com</i>	make group admin	delete
11 Smith, Jane	<i>pivot-demo-admin@proquest.com</i>	make group admin	delete
12 Smith, Stephen	<i>steve.smith@refworks-cos.com</i>		delete
13 Waldo, David	<i>david.waldo@proquest.com</i>	make group admin	delete
14 Walinsky, Lynne	<i>lynne.walinsky@proquest.com</i>	make group admin	delete

+ Add a member

Group Admins are identified with this symbol ★ Admin



# Joining or Leaving Groups – Members View

<b>Center for Environmental Studies (2 members)</b> This group encourages faculty from across disciplines to collaborate on projects related to the environment and the health of our planet. ★ Owner: Lita Kearney <i>lita.kearney@proquest.com</i>	<a href="#">leave group</a>
<b>Pivot Demo Group (3 members)</b> This is a public group that anyone in this institution can join. This group is just a test group to demonstrate the capabilities of a public group. ★ Owner: Lita Kearney <i>lita.kearney@proquest.com</i>	<a href="#">join group</a>

- Public Groups are visible to everyone at your institution.  
**Anyone can join a group and become a member**
- **Members can leave (unsubscribe) from a group** at any time
- **Members cannot see who the other members of the group are\***

*Owners and Group Administrators can see a list of all of the group members and can always add or delete members. (\*Administrators may choose to reveal names of recipients in a group when sharing opportunities.)*

If you are not the group owner or group administrator you will only see the option to join a group (or to leave a group if you are already a member)

# Creating a new group – Easy as 1, 2, 3

**+ New group**

Start by clicking “new group”

The screenshot shows the 'Add a New Group' form with three numbered callouts:

- 1** Points to the text input field for the group name, which contains the placeholder 'Enter a name for the new group' and a character count of '90 characters (90 left)'.
- 2** Points to the rich text editor for the group description, which contains the placeholder 'Add a description of the group here...' and a character count of '0 of 1600 characters'.
- 3** Points to the text input field for adding members, with the label 'Add the people that should be in this group' above it.

Other visible elements include a 'Make group public' checkbox (checked), a 'Groups you can copy from' section, and 'Cancel' and 'Submit' buttons at the bottom.

## 1 Add a Name for your Group –

- give your group a name/title

## 2 Add a Description –

- you can add a brief description or a long description to let users know what this group is about
- you can include hyperlinks and HTML styling

## 3 Add Members – type names or email addresses for the people you would like to include in the group

# Shortcuts for adding members to groups

Add the people that should be in this group ⓘ

<b>Jan</b> a Machonska	jana.machonska@
<b>Jan</b> e Mandley	jane.mandley@proquest.com
<b>Jan</b> e Smith	pivot-demo-admin@proquest.com

• Biology test group • eddie test newsletters

Begin by typing a first name or last name and Pivot will auto-suggest users

or Copy and Paste email addresses

You can also duplicate all of the members from an existing group to create a new group

**then** Add or edit names as needed

Add the people that should be in this group ⓘ

**Groups you can copy from** ⓘ

Your personal groups you can copy from

- Biology test group
- eddie test newsletters

Public groups you can copy from

- Interdisciplinary Gravitational Research group
- All Research Administrators

Cancel Submit

*If you already have an existing personal group that you would like to make public, you can also choose "make public" from the manage groups page*



# Sharing Opportunities with Groups

<input checked="" type="checkbox"/>	Track	Set to Active	<b>Share</b>	Export	Curate	Deadline
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	01 Sep 2019 Application Anticipated
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	06 Nov 2019 Letter of Intent Anticipated
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	unspecified

You can share funding opportunities from any results list with Public Groups – including Curated Lists and Curated Searches

- Select “Share”
- Then “Select Group”
- Choose one or more Groups to share with

Share (24 funding opportunities)

Recipients:

Type a name or email address

Message (optional):

500 characters

Let each recipient see who else received this

Put shared opps on recipient's tracked list.

Select group

Use Group:

Personal Groups

Biology test group

eddie test newsletters

Public Groups

Interdisciplinary Gravitational F...

Pre-set

All Research Administrators

Interdisciplinary Gravitational Research group

Add Clear

# Create and share Newsletters with Groups

## Create a Newsletter

Use this form to create a newsletter to send to a Pivot Group.

### Step 1: Name Your Newsletter

Gravitational Research Group News

### Step 2: Choose Funding Opps to Share

### Step 4: Choose a Group of Recipients

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

[Add Group](#)

Choose Group:

Personal Groups

- Biology test group
- eddie test newsletters

Public Groups

- Interdisciplinary Gravitational Research group

Pre-set Groups

When creating newsletters you can **choose one or more Groups** with whom to share custom communications and funding opportunities

Newsletters can be scheduled as **recurring communications** to your groups – just set-up once and the rest is automatic


You can share **curated lists or curated searches**

# Public Groups notes

- Owners do not have to be members of the group they create and **are not automatically added as members**
  - **Be sure to add yourself as a member** if you wish to receive content that's shared with the group
- You **can add members from outside your institution to a group** – however, they won't have any knowledge of the group other than communications shared with the group (and they have no way to remove themselves from the group)
- When adding Group members, the Pivot auto-populate feature **looks at profiles** at your institution (not user accounts). If a user doesn't have a profile you will need to enter their email address.

Many enhancements in this release were inspired by feedback and requests from customers.

We encourage you to visit the Idea Exchange to share your ideas for improvements with the Pivot community.



The image shows a banner for the ExLibris Idea Exchange. At the top left is the ExLibris logo with a rainbow arc above the text 'ExLibris a ProQuest Company' and 'ideaexchange' below it. To the right is a navigation bar with links: 'Ex Libris', 'Knowledge Center', 'Contact Support', and 'Developer Network'. The main content area has a blue background with a network pattern. On the left, it says 'Have an Idea for Ex Libris?'. In the center, there are three icons: a lightbulb, a thumbs up, and two speech bubbles. Below each icon is a text prompt: 'Share your ideas', 'Support your favorite ideas', and 'Get feedback on popular ideas'.

<https://ideas.exlibrisgroup.com/forums/911902-pivot>



**If you have any questions or need assistance,  
please contact our Support team**

pivot.support@exlibrisgroup.com

<https://supportcase.exlibrisgroup.com/?product=Pivot>