



Pivot

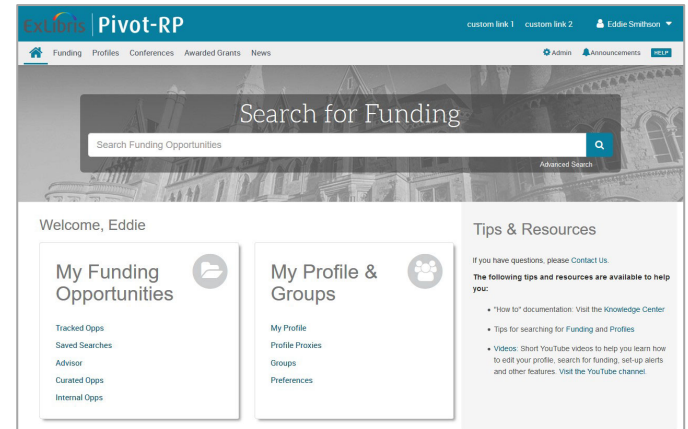
Release Notes

**August
2020**

What's New – August 2020

The new Pivot UI is coming September 9th!
This release will give you an opportunity to:

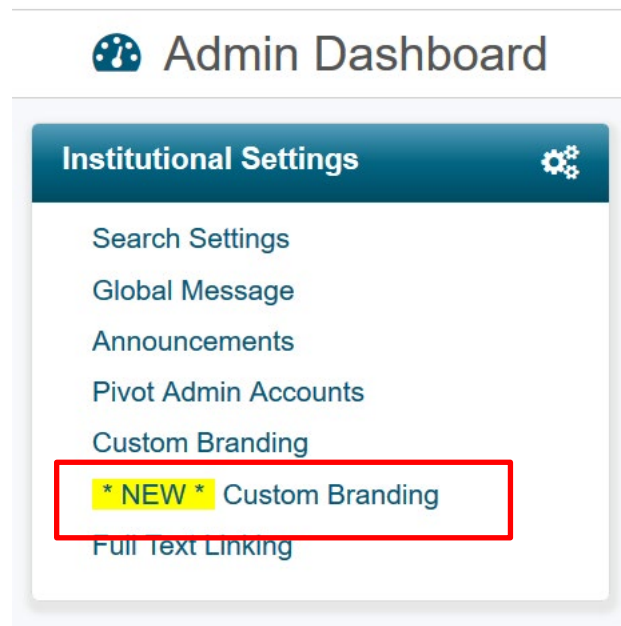
- **See** what the new UI will look like
- **Customize** the new UI to match your institutional branding and other configurations
- **Preview** the new UI with your customizations and branding
- **Save** your branding preferences so that they will automatically go live for your users when the September 9 release goes live



What's New – August 2020

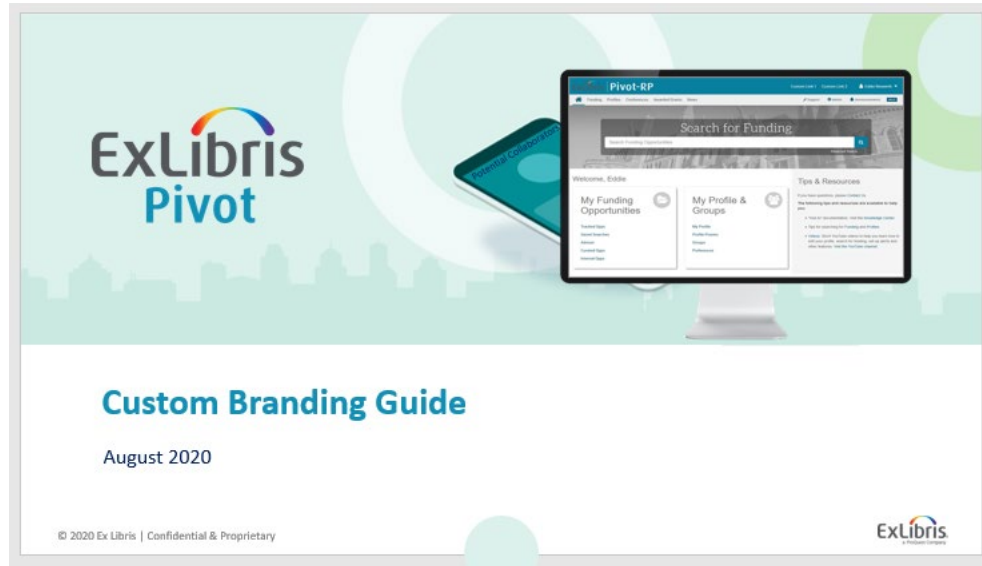
✓ New UI Custom Branding and Preview Tool

- There are no end-user changes for Pivot with the August release
- Only Admins with custom branding privileges will get access to the New UI customizer tool via the Admin Dashboard



New Custom Branding Guide

- For details on *what* can be customized in the new UI and *how* to use the new custom branding tool, please reference the new [Custom Branding Guide](#).

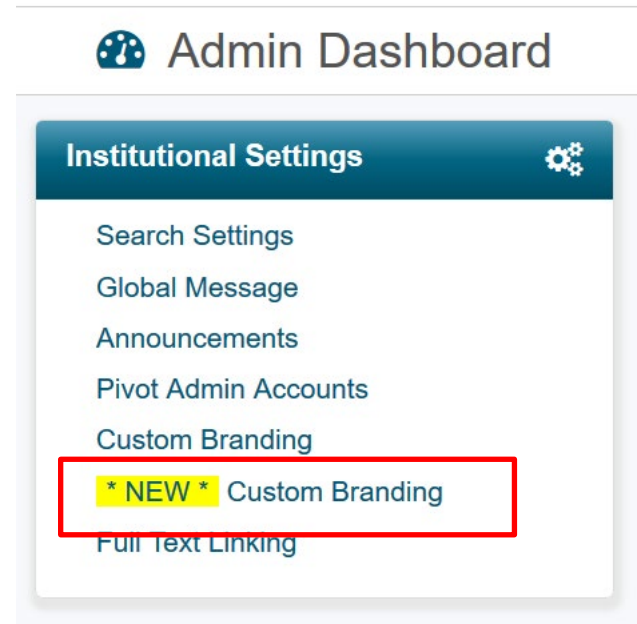


Click the image to
view the guide

Admin Privileges Required

- If you don't see the ***NEW*** Custom Branding tab in the Admin Dashboard, please contact your primary Pivot administrator for permissions or reach out to our Support team if you have questions

The branding tool is for Pivot administrators only



Customizing Pivot is optional but recommended

Why Customize?

- Pivot now makes it possible for you to match the look and feel of your institution's branding and to personalize the user experience with custom links to your internal resources and other important information for your institution. This can help:
 - ✓ Promote the value of your research enterprise
 - ✓ Make Pivot more engaging for your users
 - ✓ Better meet the needs of your users
- If you choose not make any customizations to Pivot, your users will see the new Pivot default branding which will also provide a great user experience
- Any customizations you save to Pivot after August 4th will automatically go live for your end-users on September 9th. **There will be no changes visible to end-users prior to the September 9 release.**

Recommended to-do before September 9th

What you can do between August 4th and September 9th?

Use this preview release to...

- Add Logo and Colors (optional)
- Upload a background image (optional)
- Add custom links (optional)
- Customize text in right panel (optional)
- Preview how the new UI will look with your choices (optional)
- Let your users know about the upcoming changes (optional)

- ✓ **If you do nothing your users will automatically get the new default branding of Pivot as soon as the release goes live.**

(No worries – this is still an awesome new look and feel!)

- ✓ **Feel free to make customizations any time after September 9th too!**

(No pressure – any changes or updates you make after September 9th will instantly go live for your users!)

Custom Branding basics

* NEW * Custom Branding

Use the options below to customize the branding for your institution. Your changes will not be saved until you click "Save Changes" at the bottom of this page. Be sure to preview your changes. You may revisit this page and change the branding options at any time.

Logo Settings

Institution Logo ⓘ

ExLibris | Pivot

Select Image...

Logo URL URL to link to when user clicks the logo in the top header bar.
http://www.pivot.proquest.com

Funding Alert Email Logo ⓘ

+ Select Image...

Newsletter Email Logo ⓘ

+ Select Image...

the YouTube channel.

Reset Reset to Default

Cancel Preview Changes Save Changes

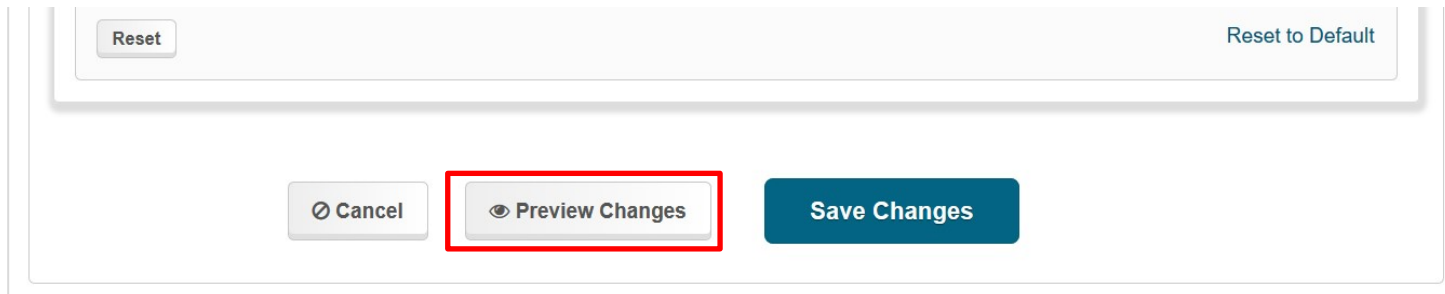
The new custom branding tool is a single Admin page broken into clear sections with prompts to modify, enter or upload the information needed for you to customize Pivot

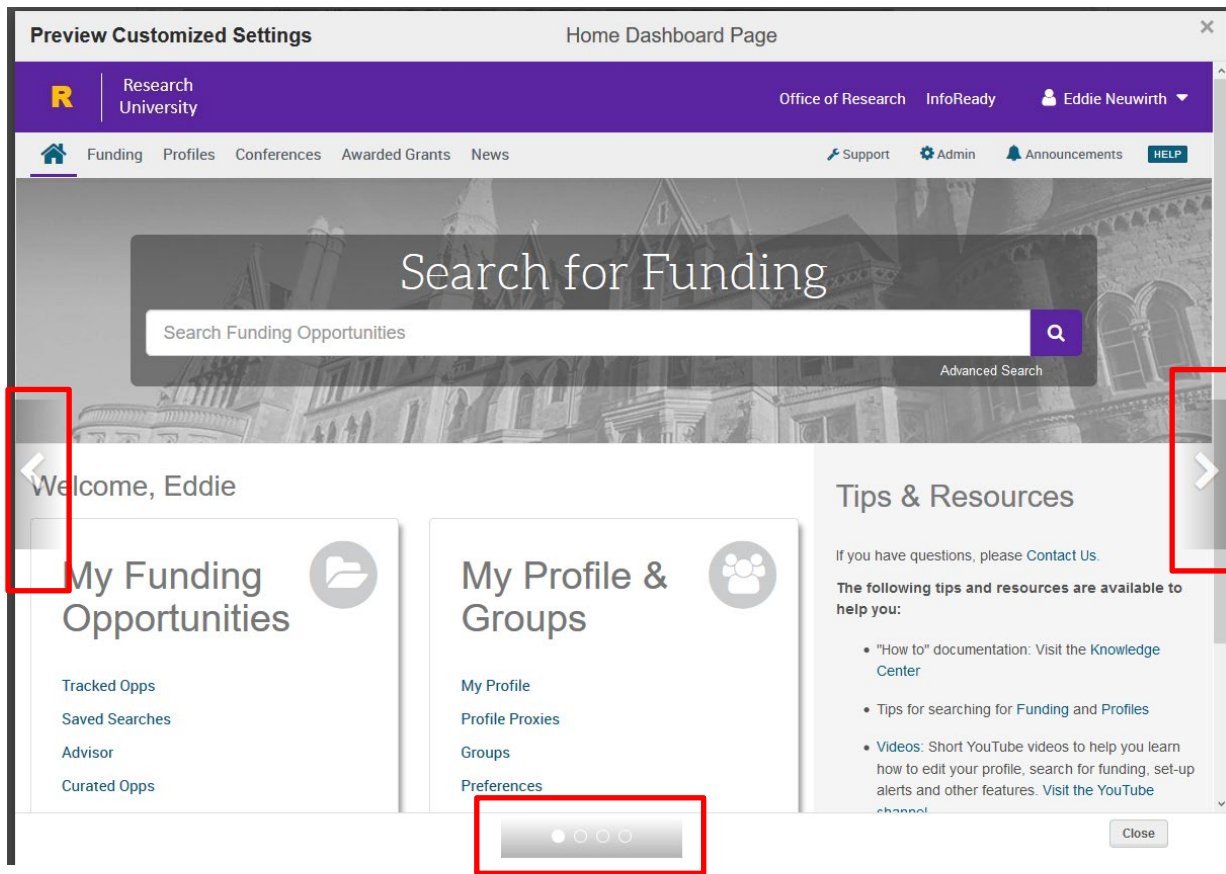
- A convenient **information icon (i)** next to each item provides additional guidance about where that item appears in the UI and offers size recommendations for images

Please reference the new [Custom Branding Guide](#) for step by step instructions

Previewing and Saving Changes

- Use the **'Preview Changes' button** at the bottom of the page to preview any customizations that you have made to see what the interface will look like with your selections
- **If you want to save the changes you've made select "Save Changes" otherwise the next time you return to Pivot you will have to start over with the defaults**





The **preview console** will show you exactly what your customized pages and headers will look like.

Use the console arrows to toggle between the different page views to preview:

- The home dashboard
- The Funding Discovery landing page
- A funding alert email
- A newsletter email

When finished click the "x" or close button to return to the customizer.

Warning: When returning to the customizer tool after previewing - be sure to **Save your changes before leaving the customizer** or none of your customizations will be saved for the next time you return to the custom branding tab.

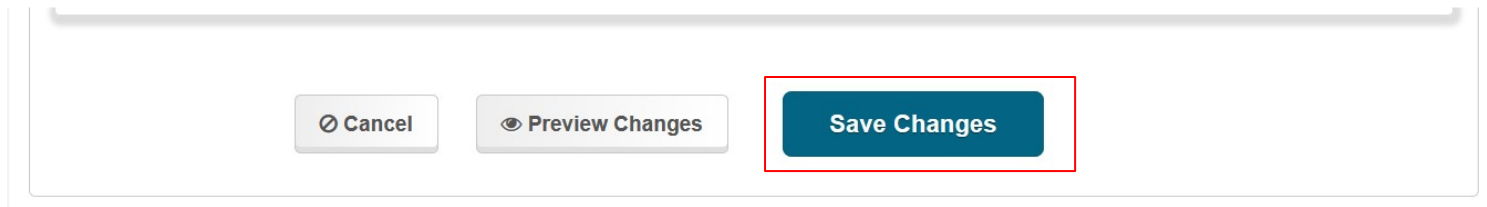
Save Your Changes

Warning: If you do not ‘Save Changes’ before leaving the customizer tool you will lose any customizations that you have made during your current session and you will need to start over with customizing when you return.

- Pivot does not store any of your changes unless you select ‘Save Changes’.
- Previewing Changes does not do anything to save changes.

Note: Prior to the September 9 release, you can save changes and they will not be visible to your users. Any changes that you have saved prior to September 9 will automatically go live for your users on September 9th!

Any customization changes that you make and save after September 9, will instantly update for your users.

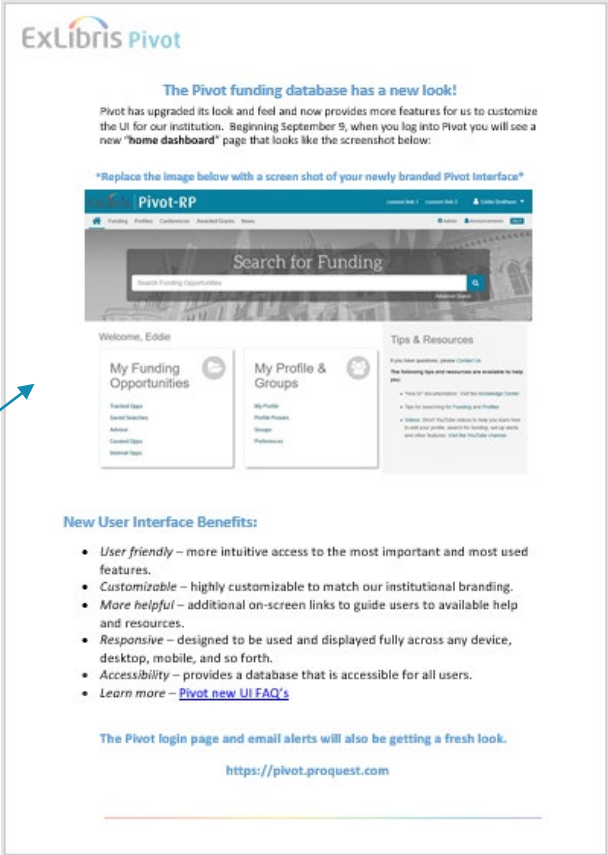


Important Reminders

- **If you do not make any customizations to Pivot, your users will automatically see the new UI with Pivot default branding beginning September 9th.**
- **Any customizations you make and save to Pivot between August 4 and September 9 will automatically go live for your users on September 9th.** Changes made during this period will not be seen by any end-users prior to September 9. Changes will only be visible to you in the admin console custom branding Preview tool.
- **You can make changes to your Pivot customizations at any time before or after September 9 and make them as often as you would like.**

Resources

- In order to help you communicate to your users about upcoming UI changes, we are in the process of updating resources and guides in our knowledge center. Visit the Resources and Support page: https://knowledge.exlibrisgroup.com/Pivot/Product_Materials/Resources_and_Support
- More documents will be updated between now and the September 9 release. Look for items marked “New UI” or “2020” for the latest updates.
- For now you can use our customizable “Pivot has a new look!” flyer to let your users know that Pivot will have a new UI.
 - **Just take a screenshot of your customized UI in Preview mode and use it in place of our default image to let your users know what the new UI will look like for your institution.**



ExLibris Pivot

The Pivot funding database has a new look!

Pivot has upgraded its look and feel and now provides more features for us to customize the UI for our institution. Beginning September 9, when you log into Pivot you will see a new “home dashboard” page that looks like the screenshot below:

Replace the image below with a screen shot of your newly branded Pivot Interface

Pivot-RP

Search for Funding

Welcome, Eddie

My Funding Opportunities

My Profile & Groups

Tips & Resources

New User Interface Benefits:

- *User friendly* – more intuitive access to the most important and most used features.
- *Customizable* – highly customizable to match our institutional branding.
- *More helpful* – additional on-screen links to guide users to available help and resources.
- *Responsive* – designed to be used and displayed fully across any device, desktop, mobile, and so forth.
- *Accessibility* – provides a database that is accessible for all users.
- *Learn more* – [Pivot new UI FAQ's](#)

The Pivot login page and email alerts will also be getting a fresh look.

<https://pivot.proquest.com>

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

pivot.support@exlibrisgroup.com

<https://supportcase.exlibrisgroup.com/s/pivot>