

Pivot-RP Custom Branding Guide

How to customize the Pivot-RP UI using the Custom Branding tool

The Pivot-RP customizer/preview tool is highly intuitive.

You can experiment with the tool and use the preview function to get a feel for what is possible without impacting your end-users. Use this guide as a reference.

This document is organized into two overview sections:

- ***What can be customized***
- ***How to customize*** and preview Pivot-RP using the custom branding tool



What can be customized?

Primary areas that can be customized

These items are all visible on the Home Dashboard Page which all your users see

1. Add your own logo
2. Add a custom link that users will go to if they click on your logo
3. Change the header color and search button color (primary color)
4. Change the accent colors for the help link and home icon (secondary color)
5. Add up to two additional custom links in the header
6. Upload your own background image for the home dashboard page
7. Modify the content in the right-hand 'tips & resources' panel of the home page (which can include text, links, images and HTML styling)
8. Choose to use the primary or secondary color for limited submission or internal opps highlights

Additional areas that can be customized

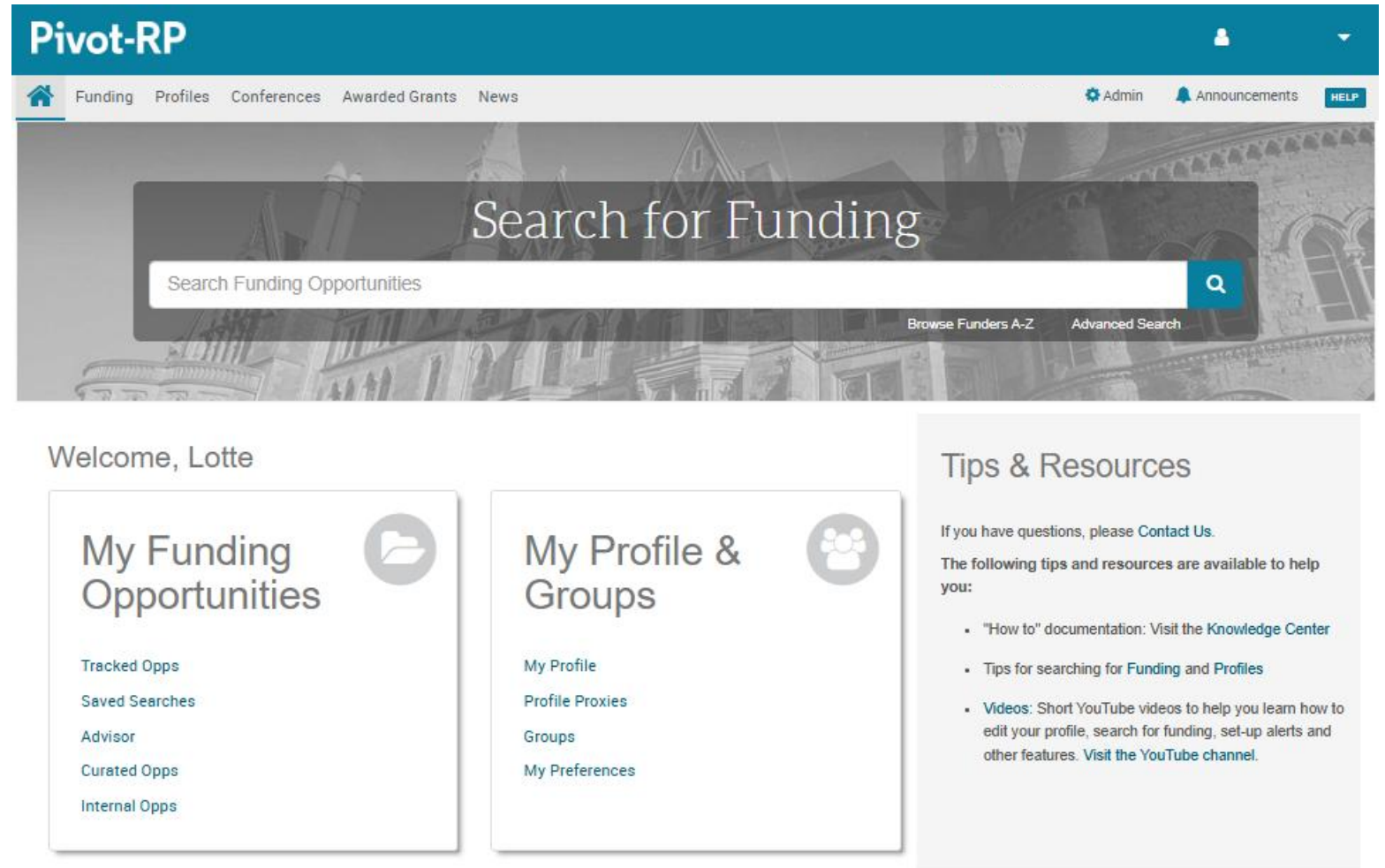
Have fun and experiment until you find something that works for you

9. Add a custom favicon icon to highlight your Internal opportunities
10. Choose the color (or image) for the background area of the search landing pages for funding, profiles, conferences and awarded grants
11. Add a custom logo for Weekly Funding Alert emails (optional)
12. Add a custom logo for Newsletter emails (optional)

Things to keep in mind:

- You can choose to configure any (or all) of these features - branding is optional
- You can change your mind and modify or update customizations at any time (changes update instantly)
- No IT or web design or coding skills are required
- You can easily re-set the branding to the Pivot-RP defaults at any time
- You can always preview any changes you make before they go live

Home Dashboard with default branding



The screenshot displays the Pivot-RP Home Dashboard. At the top, a teal header bar contains the "Pivot-RP" logo on the left and a user profile icon on the right. Below this, a light gray navigation bar features a home icon and links for "Funding", "Profiles", "Conferences", "Awarded Grants", and "News". On the right side of this bar are links for "Admin", "Announcements", and a "HELP" button. The main content area has a background image of a historic building. A large, dark gray search bar is centered, with the text "Search for Funding" in white. Below the search bar is a white input field labeled "Search Funding Opportunities" and a blue search button with a magnifying glass icon. To the right of the search bar are links for "Browse Funders A-Z" and "Advanced Search". Below the search bar, the text "Welcome, Lotte" is displayed. There are two main content boxes: "My Funding Opportunities" with a folder icon and a list of links (Tracked Opps, Saved Searches, Advisor, Curated Opps, Internal Opps), and "My Profile & Groups" with a group icon and a list of links (My Profile, Profile Proxies, Groups, My Preferences). On the right side, there is a "Tips & Resources" section with a heading, a link to "Contact Us", and a list of resources including "How to" documentation, tips for searching, and videos.

Pivot-RP

Home Funding Profiles Conferences Awarded Grants News Admin Announcements **HELP**

Search for Funding

Search Funding Opportunities

Browse Funders A-Z Advanced Search

Welcome, Lotte

My Funding Opportunities

- Tracked Opps
- Saved Searches
- Advisor
- Curated Opps
- Internal Opps

My Profile & Groups

- My Profile
- Profile Proxies
- Groups
- My Preferences

Tips & Resources

If you have questions, please [Contact Us](#).

The following tips and resources are available to help you:

- "How to" documentation: Visit the [Knowledge Center](#)
- Tips for searching for [Funding](#) and [Profiles](#)
- **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](#).

Custom branded example

The screenshot displays the Research University Funding Opportunities portal. The header is purple with the Research University logo and navigation links for Office of Research, Proposal Development, and user profile (Eddie Neuwirth). A secondary navigation bar includes links for Funding, Profiles, Conferences, Awarded Grants, and News, along with Admin, Announcements, and a HELP button. The main banner features a search bar with the text "Search Funding Opportunities" and a magnifying glass icon, with a link to "Advanced Search". Below the banner, a "Welcome, Eddie" message is followed by two main sections: "My Funding Opportunities" and "My Profile & Groups". The "My Funding Opportunities" section lists links for Tracked Opps, Saved Searches, Advisor, Curated Opps, and Internal Opps. The "My Profile & Groups" section lists links for My Profile, Profile Proxies, Groups, and Preferences. On the right, a custom branded section titled "This section is for custom text" contains a description field and a list of bullet points: "take advantage of this space to advertise additional resources", "guide your users to help tools or training materials", and "Link to your policies, office hours or research administration systems". A note at the bottom of this section states: "You can add links, HTML styling, change colors and even upload images into this space. The possibilities are endless."

Research University

Office of Research | Proposal Development | Eddie Neuwirth

Funding | Profiles | Conferences | Awarded Grants | News

Admin | Announcements | HELP

Search for Funding

Search Funding Opportunities

Advanced Search

Welcome, Eddie

My Funding Opportunities

- Tracked Opps
- Saved Searches
- Advisor
- Curated Opps
- Internal Opps

My Profile & Groups

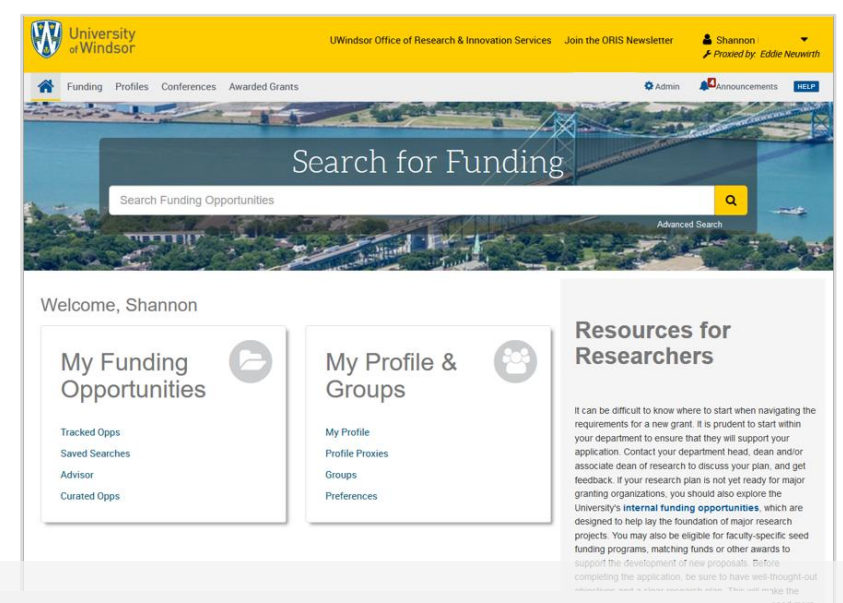
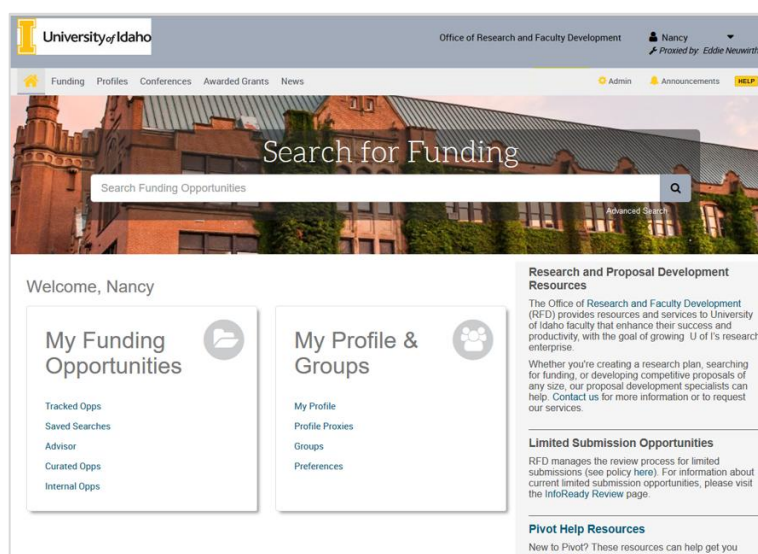
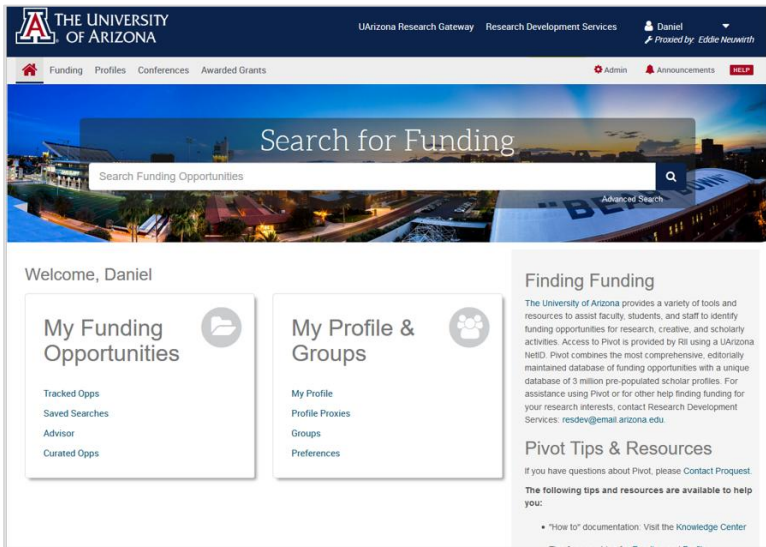
- My Profile
- Profile Proxies
- Groups
- Preferences

This section is for custom text

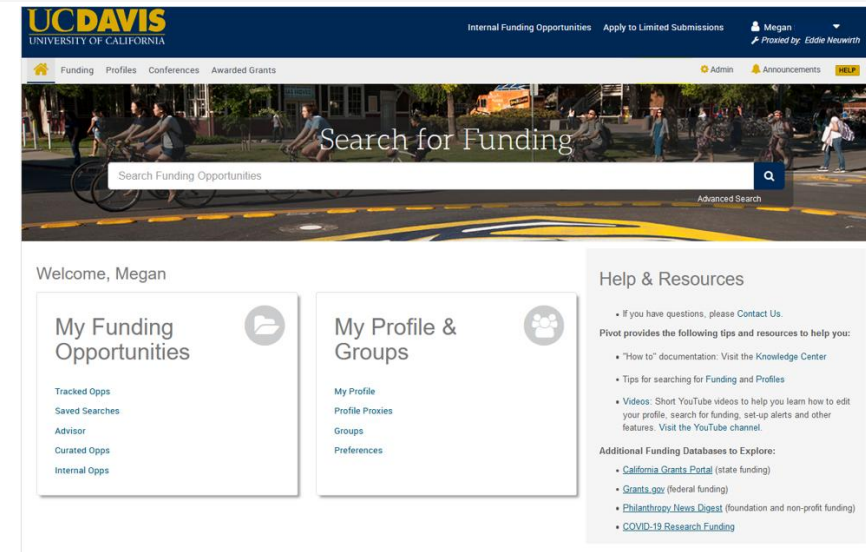
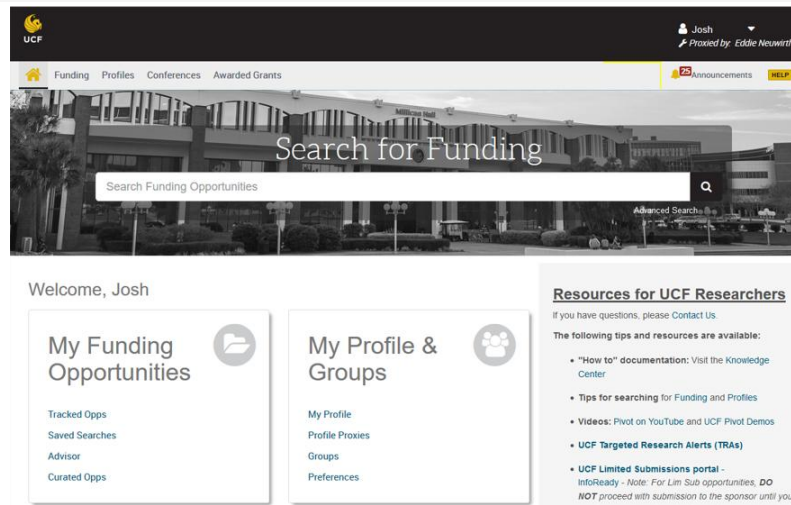
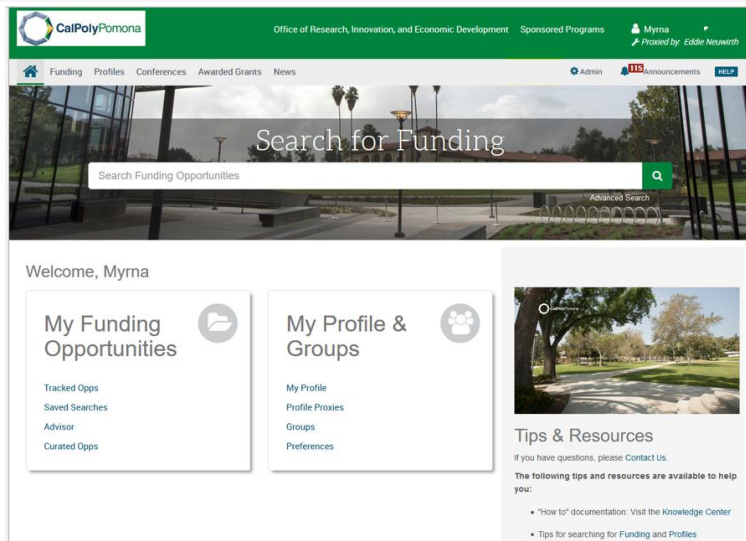
Add a description of the services you offer....

- take advantage of this space to advertise additional resources
- guide your users to help tools or training materials
- Link to your policies, office hours or research administration systems

You can add links, HTML styling, change colors and even upload images into this space. The possibilities are endless.



Highly customizable user interface examples



Primary areas that can be customized

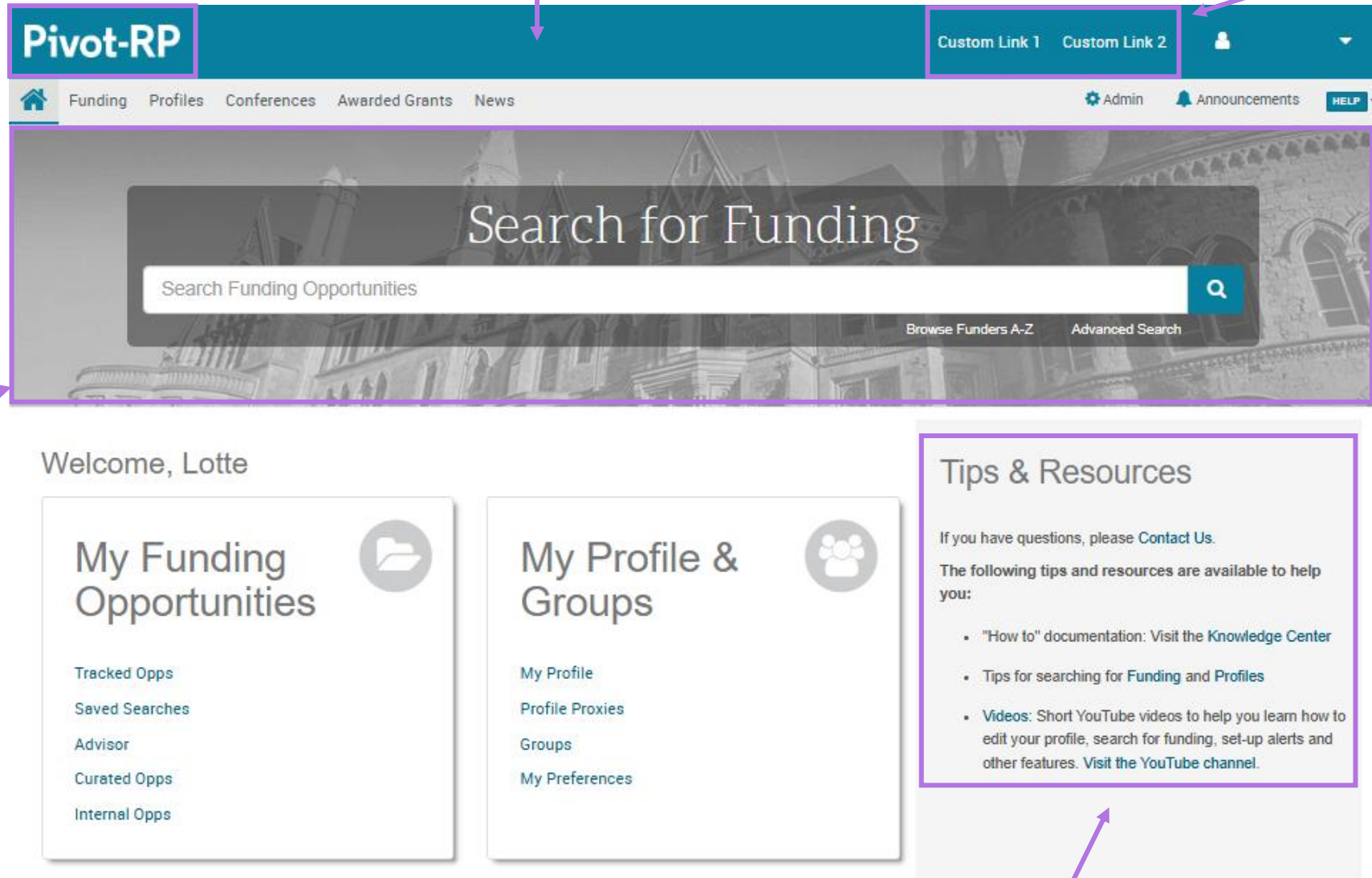
Choose a primary header and search button color

Add up to two custom links

Add a custom logo

Choose secondary accent colors

Choose an alternate background image



This section can include custom text, html, links and images; and you can modify the text colors

Search page customization

You can choose a search box background color for the primary search pages (Funding Discovery, Profile Discovery, Conferences, and Awarded Grants). The default color is gray.

Load a custom favicon icon to highlight your internal opportunities (by default this will be a mix of your primary and secondary color choices)

The screenshot shows the Pivot-RP search page. The top navigation bar is teal with the Pivot-RP logo and links for Home, Funding, Profiles, Conferences, Awarded Grants, and News. On the right are links for Admin, Announcements, and a HELP button. Below the navigation bar is a search bar with a gray background, highlighted by a purple box. The search bar contains the text "Search funding opportunities (enter search terms)" and a search icon. Above the search bar are links for "Search All Fields", "Search by Funder", and "Search by Keyword". Below the search bar are links for "Search Tips" and "Advanced Search". To the left of the search bar is a sidebar with a purple box around the "Internal Opts" link, which is highlighted with a purple square. The sidebar also includes links for "Tracked Opts" (259), "Curated Opts" (131), "Your Profile", and "Groups". The main content area is titled "Funding Discovery" and contains a description of the funding discovery process. Below the description is a section titled "Browse by Keyword" with a sunburst chart showing the total amount available per keyword. The chart is interactive and can be used to view the list of matching opportunities.

Pivot-RP

Home Funding Profiles Conferences Awarded Grants News

Admin Announcements HELP

Search All Fields | Search by Funder | Search by Keyword

Search funding opportunities (enter search terms)

Search Tips Advanced Search

Funding Discovery

Internal Opts 25

Tracked Opts 259

Curated Opts 131

Your Profile

Groups

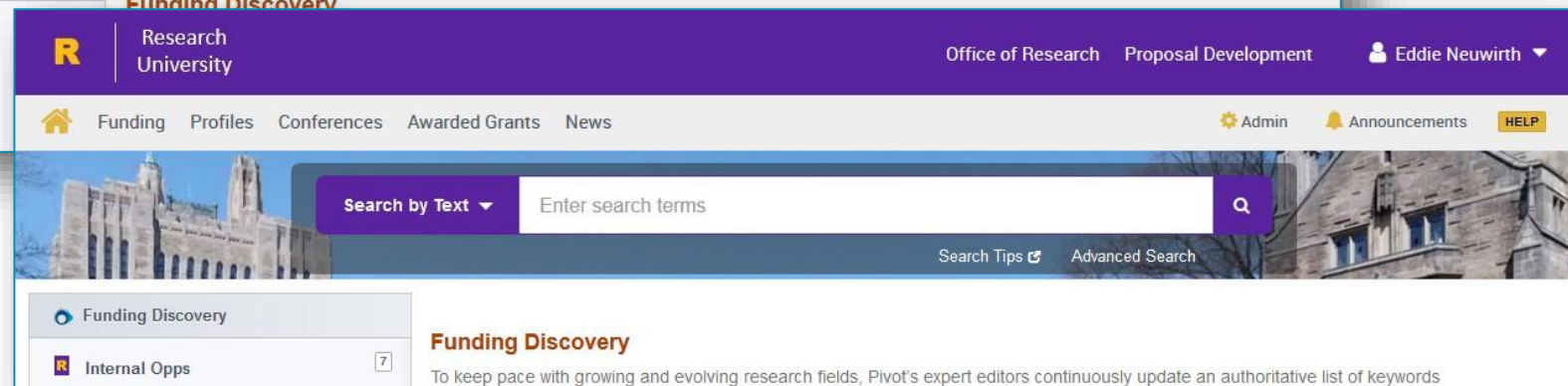
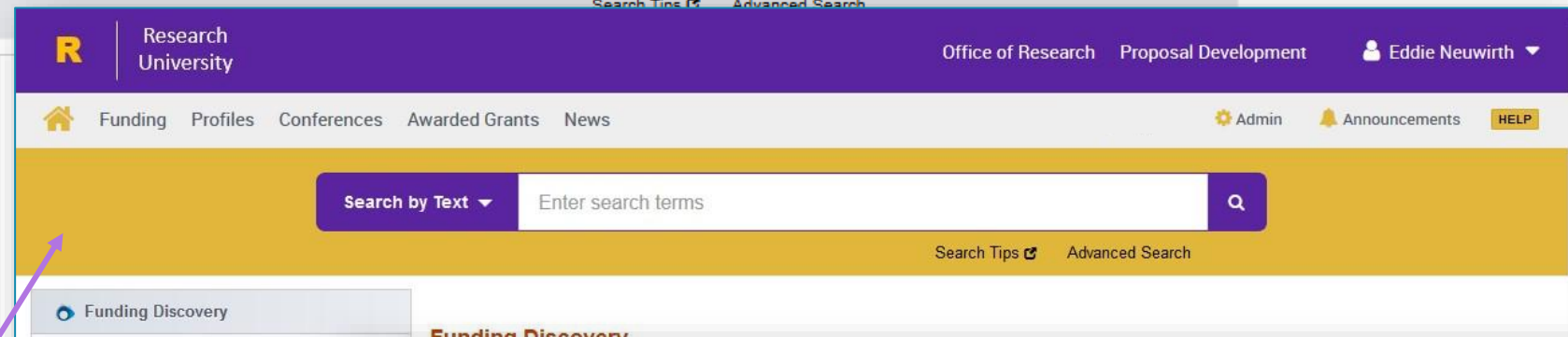
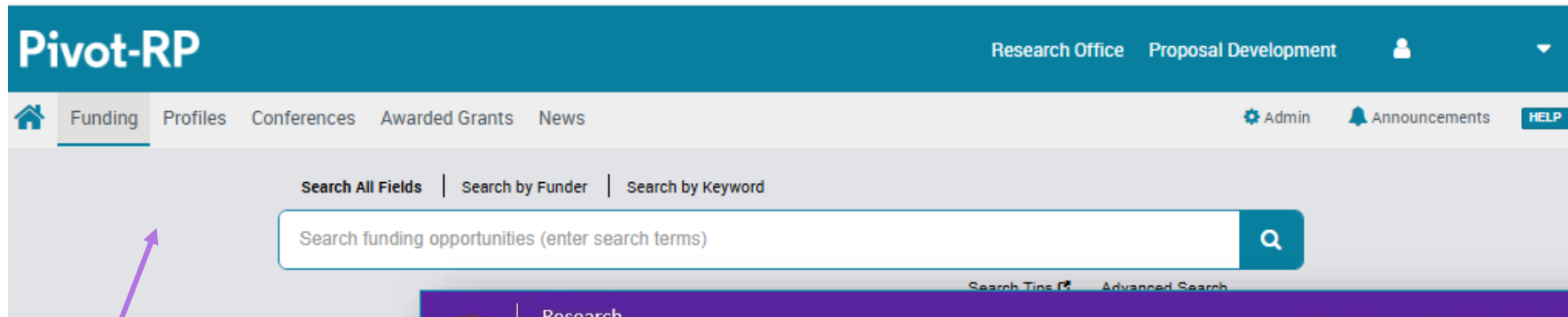
Funding Discovery

To keep pace with growing and evolving research fields, our expert editors continuously update an authoritative list of keywords that are carefully matched to each funding opportunity. Enter search terms above or browse by keyword to explore the latest funding opportunities and research trends.

Browse by Keyword

This chart is interactive. You can mouseover a section to see the total amount available per keyword. Click a section to view the list of matching opps. (Amount normalized to EUR.)

Search page customization



For the search box background color you can choose from the following:

- default gray
- your secondary color
- your home dashboard image

Funding Alert email customization

 Research University

Your funding opportunities from Pivot-RP™

Funding Alerts for Jan 14, 2026

Funding Search

5 Results

	Deadline	Amount
LIMITED Incitec Pivot Fertilisers Service to Industry Award Cotton Research and Development Corporation (CRDC) The Cotton Research and Development Corporation invites nominations for its Incitec Pivot Fertilisers service to industry award. This award is for individuals that have: Provided exceptional service and shown significant commitment to the Australian Cotton Industry. Achieved a positive impact on...	27 Aug 2026 Nomination Anticipated	\$2,000 AUD
INTERNAL ProQuest Doctoral Dissertation Award ProQuest This award recognizes the most outstanding doctoral dissertation/thesis in information science the preceding twelve months.	continuous Application	\$10,000 USD
AAA-Incitec Pivot Limited (IPL) Scholarship & Internship American Australian Association (AAA) The American Australian Association invites applications for the Incited Pivot Limited veteran scholarship and internship. This provides the opportunity to an Australian and American veteran to conduct graduate level study in the country of the other.	continuous Application Confirmed	\$40,000 USD

Default header/logo

 Brought to you by the office of Research Development

Your funding opportunities from Pivot-RP™

Funding Alerts for Aug 01, 2020

Pivot Search

5 Results

	Deadline	Amount
LIMITED Incitec Pivot Fertilisers Service to Industry Award Cotton Research and Development Corporation (CRDC) 27 Mar 2021 Nomination Anticipated		\$2,000 AUD
INTERNAL Proquest Funding Opportunity ProQuest continuous Application		\$500 USD

Custom header/logo

By default the weekly funding alert emails will use your custom logo and colors from the header branding. If desired, you can replace this with a custom logo.

Newsletter email customization

Default header

 Research University

Funding News for Eddie Neuwirth

This is a test newsletter created to email a list of funding opportunities curated by the Research Admin to specified recipients.

Test List		
4 Opportunities	Deadline	Amount
Secondary Analysis of Existing Datasets in Heart, Lung, and Blood Diseases and Sleep Disorders (R21 Clinical Trial Not Allowed) National Heart, Lung, and Blood Institute (NHLBI)	28 Oct 2020 Application Confirmed	\$150,000 USD
 AACR-American Cancer Society Award for Research	31 Jul 2020	see record

Custom newsletter header/logo

 Research University News

Funding News for Eddie Neuwirth

This is a test newsletter created to email a list of funding opportunities curated by the Research Admin to specified recipients.

Test List		
4 Opportunities	Deadline	Amount
Secondary Analysis of Existing Datasets in Heart, Lung, and Blood Diseases and Sleep Disorders (R21 Clinical Trial Not Allowed) National Heart, Lung, and Blood Institute (NHLBI)	28 Oct 2020 Application Confirmed	\$150,000 USD

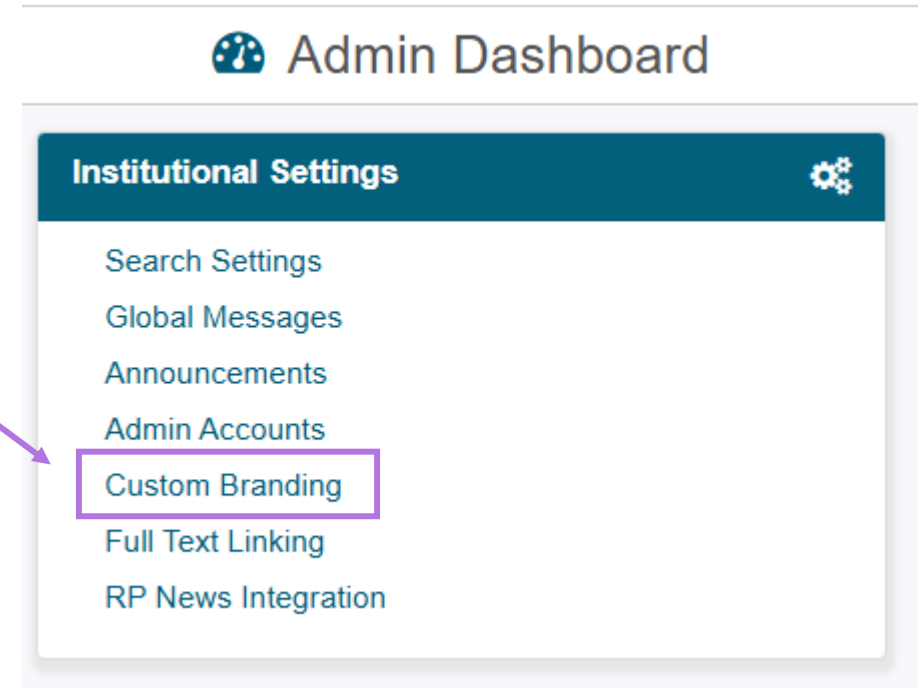
By default, newsletters will use your custom logo and colors from the header branding. If desired, you can replace this with a custom logo just for newsletters



How to use the custom branding tool

Custom Branding Settings

In the Admin Dashboard → Institutional Settings menu, select **Custom Branding** to get to the customizer tool



Custom Branding page basics

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 ⓘ

Pivot-RP

+ 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 branding tool is a single Admin page broken into clear sections with prompts to enter or upload the information needed
- An **information icon (i)** next to each item provides additional detail about where that item appears in the UI and offers size recommendations for images
- At the bottom of the page you can "Preview" the 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" otherwise the next time you return to Pivot-RP you will have to start over with the defaults

Logo Settings

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 ⓘ


+ Select Image...

Logo URL URL to link to when user clicks the logo in the top header bar.

Funding Alert Email Logo ⓘ

+ Select Image...

Newsletter Email Logo ⓘ

+ Select Image...

Replace the standard Pivot-RP logo with a logo of your choosing

Tips:

- The logo is automatically depicted on the primary background color. You may wish to jump to the color settings section first to pick your header color if you want to see what your logo will look like with your color selections.
- Try to use a logo that is no more than 80 pixels high. Pivot-RP will automatically re-size logos to fit the header space. A larger logo may not look good.
- Add a Logo URL if you want users to be able to link from your logo to another page.

You can also upload different custom logos for Funding Alert and Newsletter emails. You only need to upload a separate logo for Alert and Newsletter emails, if you desire a different look and feel from your header branding. **By default, Alerts and Newsletters will use the same logo and colors as the header.**

Color Settings

Color Settings

Disclaimer: By using this feature, you are responsible for making sure the colors meet the WCAG AA standard.
Use this free tool to check your colors: [WebAIM: Color Contrast Checker](#)

Primary Color ⓘ

#097f9f

☐ Use primary color for limited submission and other highlights

Secondary Color ⓘ

#0a5f7e

☒ Use secondary color for limited submission and other highlights

Internal Funding Icon / Favicon (16x16) ⓘ



+ Select Image...

Search box background color ⓘ

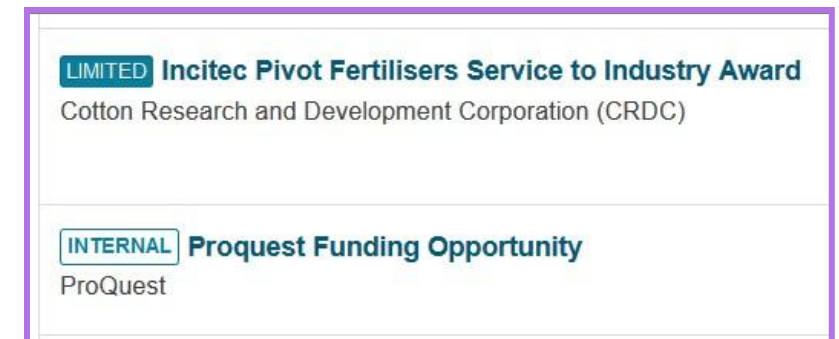
☒ Use default (Gray #E2E3E7)
☐ Use secondary color selected above
☐ Use home background image (note image will be compressed to fit space)

Choose your primary and secondary colors

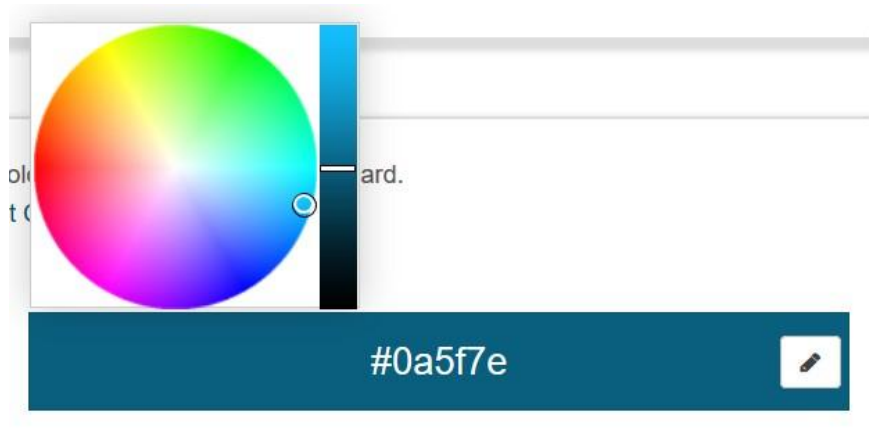
- Primary color is used for the header background color and search buttons
- Secondary color can be used for accent colors like the help link, home dashboard icon and limited submission pills

You may also choose whether to use your primary or secondary color to highlight limited submission opportunities

You can also use the secondary color or home background image to fill the search box background area for the search landing pages. By default this area is gray.



Choosing a Color / Internal Opps Favicon



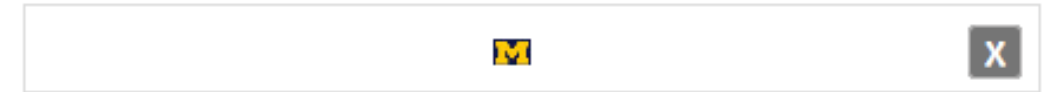
You can enter a Hexadecimal number directly in the color bar, or select the pencil icon to activate the built-in color picker

Internal Funding Icon / Favicon (16x16) ⓘ



+ Select Image...

Internal Funding Icon / Favicon (16x16) ⓘ



Replace Image...

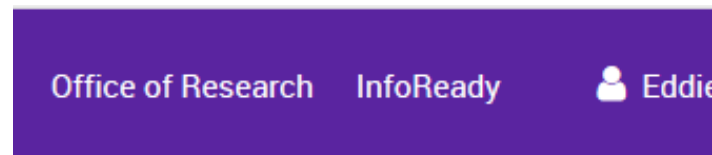
File: Mfavicon.jpg

The internal funding favicon will by default take on the colors of your primary and secondary color. Or, you can upload your own icon/logo.

Custom Header Links

You can add up to 2 custom links to your header. Enter the text you want to see on screen in the left input box and provide the URL on the right. You can just leave the custom links fields blank, if you do not want any links to show up on the interface.

Tip: You can use this feature to add some informational text to your header. If you leave the URL field blank, your link text will still show up as text (not as a clickable link)



Header Bar Settings

Header Links Links displayed in upper right of top header bar.

Enter link text	http://www.site.com... Copy and paste your URL here	⊖
Enter link text	http://www.site.com... Copy and paste your URL here	⊖

Home Dashboard background image

Home Page Dashboard Settings

Home/Dashboard Background Image ⓘ



+ Select Image...

Replace the default background image with an image of your own choosing. This image can be anything – such as an image of your institution, a nature picture, or an interesting graphic, color or pattern.

Tip: The background image you add will automatically be resized to fit the available space. Try to upload an image around 300px high and 1250px wide if you want it to maintain its original proportions and clarity.

Background image examples & ideas



Default



University Quad

Pattern



Background image examples & ideas



Technology



University
Landmark

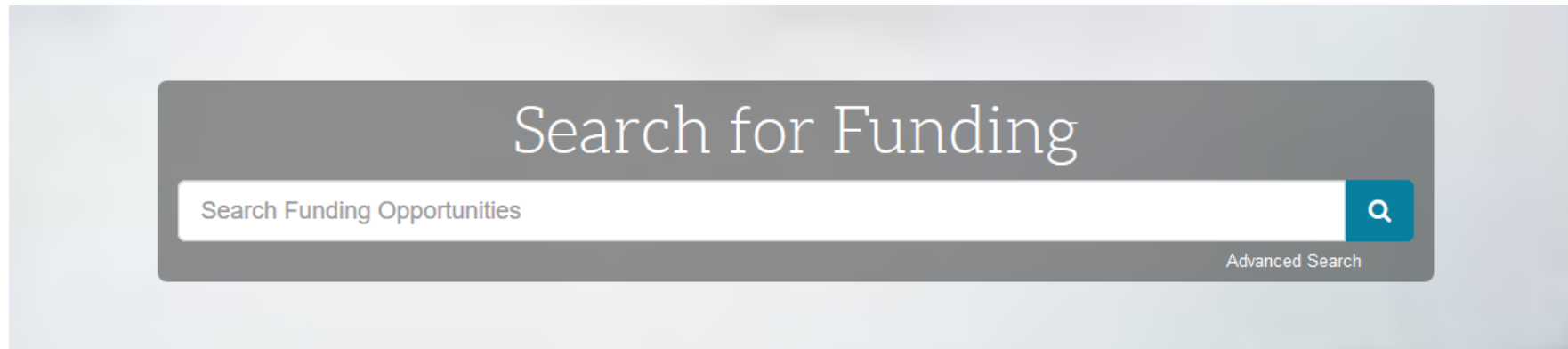
Nature



Background image examples & ideas



People



Solid color
or
gradient

Collegiate logo



Background image sizing and tips

Warning: The background image you add will automatically be resized to fit the available space.

For best result try to upload an image around **300px high and 1250px wide** if you want it to maintain its original proportions and clarity.

- Any image that is significantly smaller than 1250px wide will be expanded and appear somewhat blurry
- Any image that is substantially taller than 300px high will get cut-off and not display fully

Tips: You can add a smaller image with a solid color, gradient color or interesting pattern, if you are looking for a more artistic or blurred background effect.

For example, uploading this tiny image square  will give you a solid blue background.

Customizing the right panel

Tips & Resources

If you have questions, please [Contact Us](#).

The following tips and resources are available to help you:

- "How to" documentation: Visit the [Knowledge Center](#)
- Tips for searching for [Funding](#) and [Profiles](#)
- **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](#).

By default the right panel is pre-populated with links to Pivot-RP help resources. This content can be overwritten using the customizer tool.

The right-hand column of the Home Dashboard page can be completely customized for your institution.

This area could include:

- A description of the services you offer
- Important contact information or office hours
- Links to important resources, departments, and tools for researchers
- Reminders about policies and procedures
- A showcase of important research from your institution via links articles, blogs, Twitter, etc.
- Special announcements
- Links for help, training sessions or user guides on how to use Pivot-RP
- And much more...

Customizing the right panel: text and colors

Right Column Content Text to appear in far-right section of Home page

Tips & Resources

If you have questions, please [Contact Us](#).

The following tips and resources are available to help you:

- "How to" documentation: Visit the [Knowledge Center](#)
- Tips for searching for [Funding](#) and [Profiles](#)
- [Videos](#): Short YouTube videos to help you learn how to edit your profile, search for funding, set-up [the YouTube channel](#).

Reset

Click anywhere in the text area to modify the default text

- Use the tools at the top to change the size of text and styling

You can easily change colors of text by selecting the "A" icon to expose the color picker

- Hit 'select' to create or pick additional colors not visible in the color picker

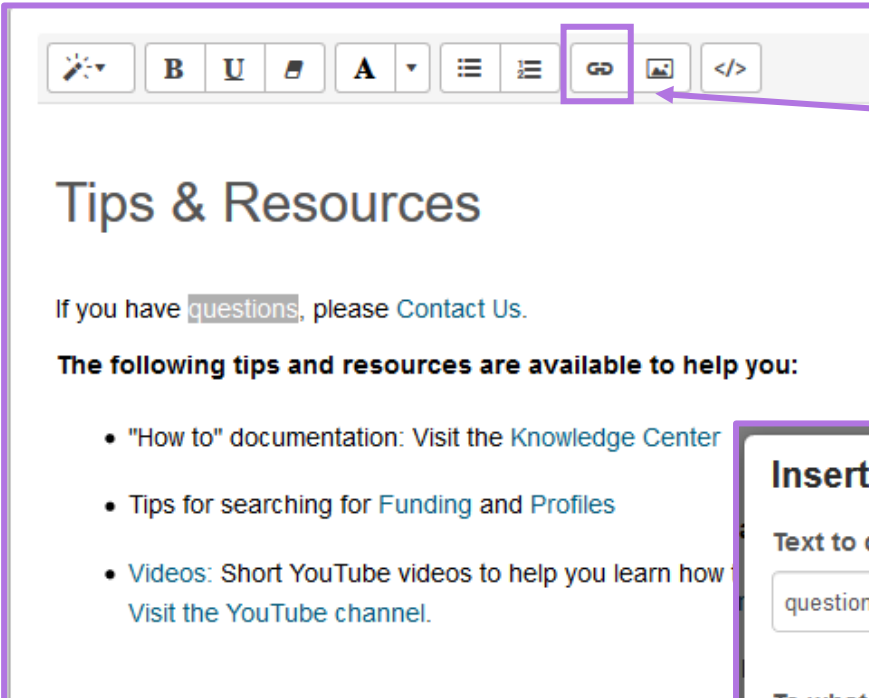
Adding Links

If you have questions, please [Contact Us](#).

The following tips and resources are available to help you:

- "How to" documentation: Visit the [Knowledge Center](#)
- Tips for searching for [Funding](#) and [Profiles](#)
- [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](#).

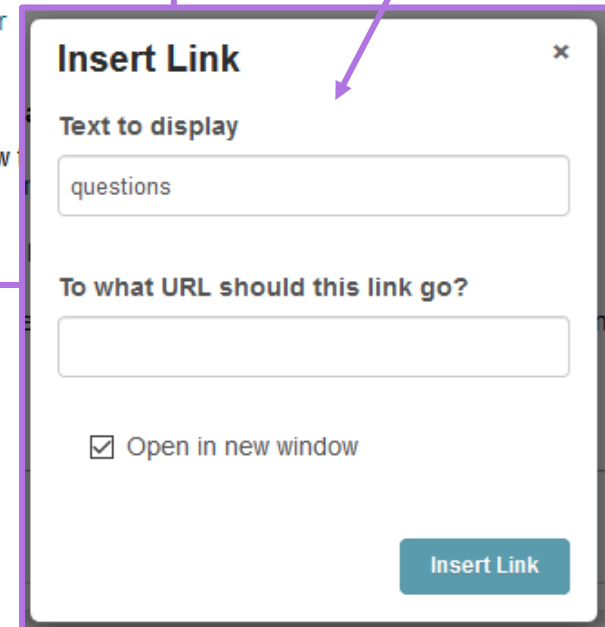
You can add unlimited numbers of links to any other webpages or resources.



The screenshot shows a rich text editor interface. The toolbar at the top includes icons for undo, bold (B), italic (I), link (chain icon), text color (A), background color, bulleted list, numbered list, link (GO icon), image, and source code. Below the toolbar, the text "Tips & Resources" is displayed. Underneath, it says "If you have questions, please [Contact Us](#)." followed by "The following tips and resources are available to help you:". A list of three items follows: "How to" documentation, Funding and Profiles, and Videos. The word "questions" in the first sentence is highlighted in grey, and the "GO" icon in the toolbar is highlighted with a purple box. A purple arrow points from this box to the "Insert Link" dialog box.

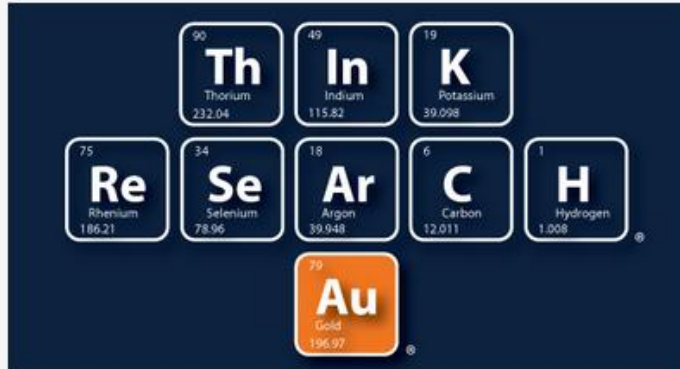
- Highlight text that you would like to turn into a link
- Select the 'link' icon and then enter the URL for the webpage you want this text to link to

Tip: You can choose if your link should open in a new browser window/tab (*this is recommended*)



The "Insert Link" dialog box is shown. It has a title bar with a close button (X). The first section is "Text to display" with a text input field containing the word "questions". The second section is "To what URL should this link go?" with an empty text input field. Below this is a checkbox labeled "Open in new window" which is checked. At the bottom right is a blue button labeled "Insert Link". A purple arrow points from the "GO" icon in the toolbar to the "Insert Link" dialog box.

Adding Images



Tips & Resources

If you have questions, please [Contact Us](#).

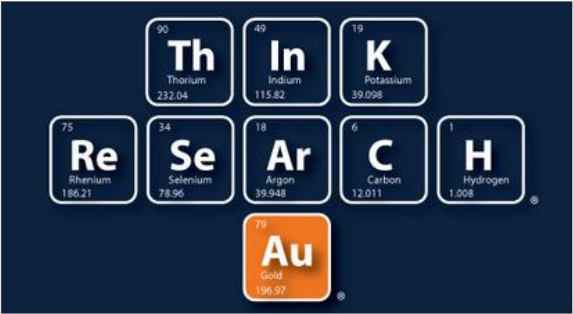
The following tips and resources are available to help you:

- "How to" documentation: Visit the [Knowledge Center](#)
- Tips for searching for [Funding](#) and [Profiles](#)

Example of an image showing in right column

Right Column Content Text to appear in far-right section of Home page





Tips & Resources

If you have questions, please [Contact Us](#).

The following tips and resources are available to help you:

- "How to" documentation: Visit the [Knowledge Center](#)
- Tips for searching for [Funding](#) and [Profiles](#)

You can easily add images to the right panel

- Images must already reside on a published webpage
- Select the 'picture' icon and then enter the URL path for the image you want displayed

Insert Image

Image URL

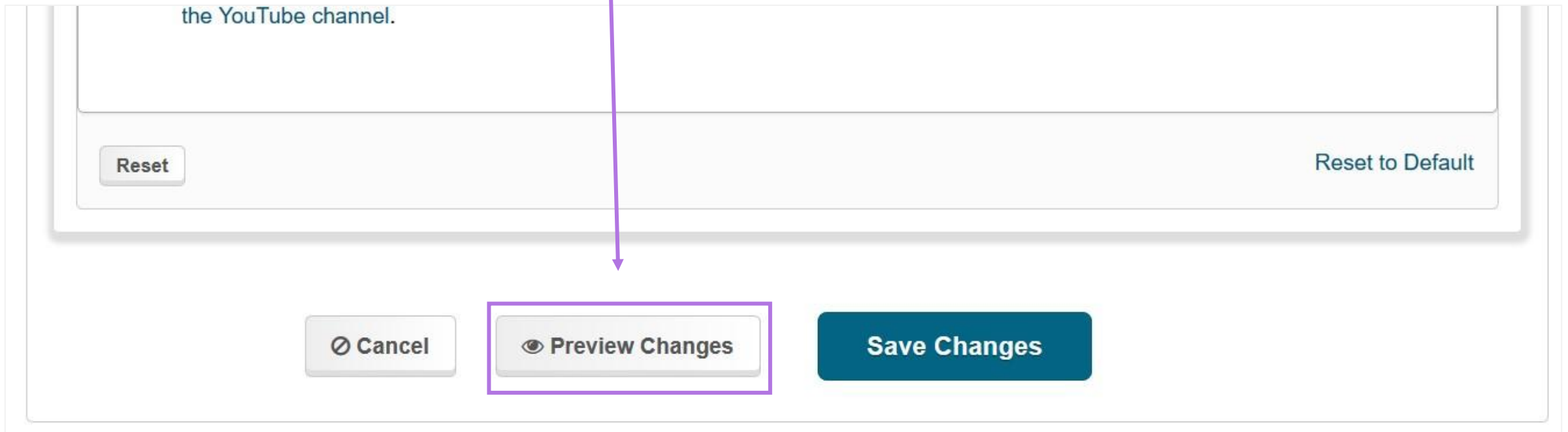
Insert Image

Tip: If necessary, you can resize the image. Just click on the image in the console to bring up the re-sizing options tool.

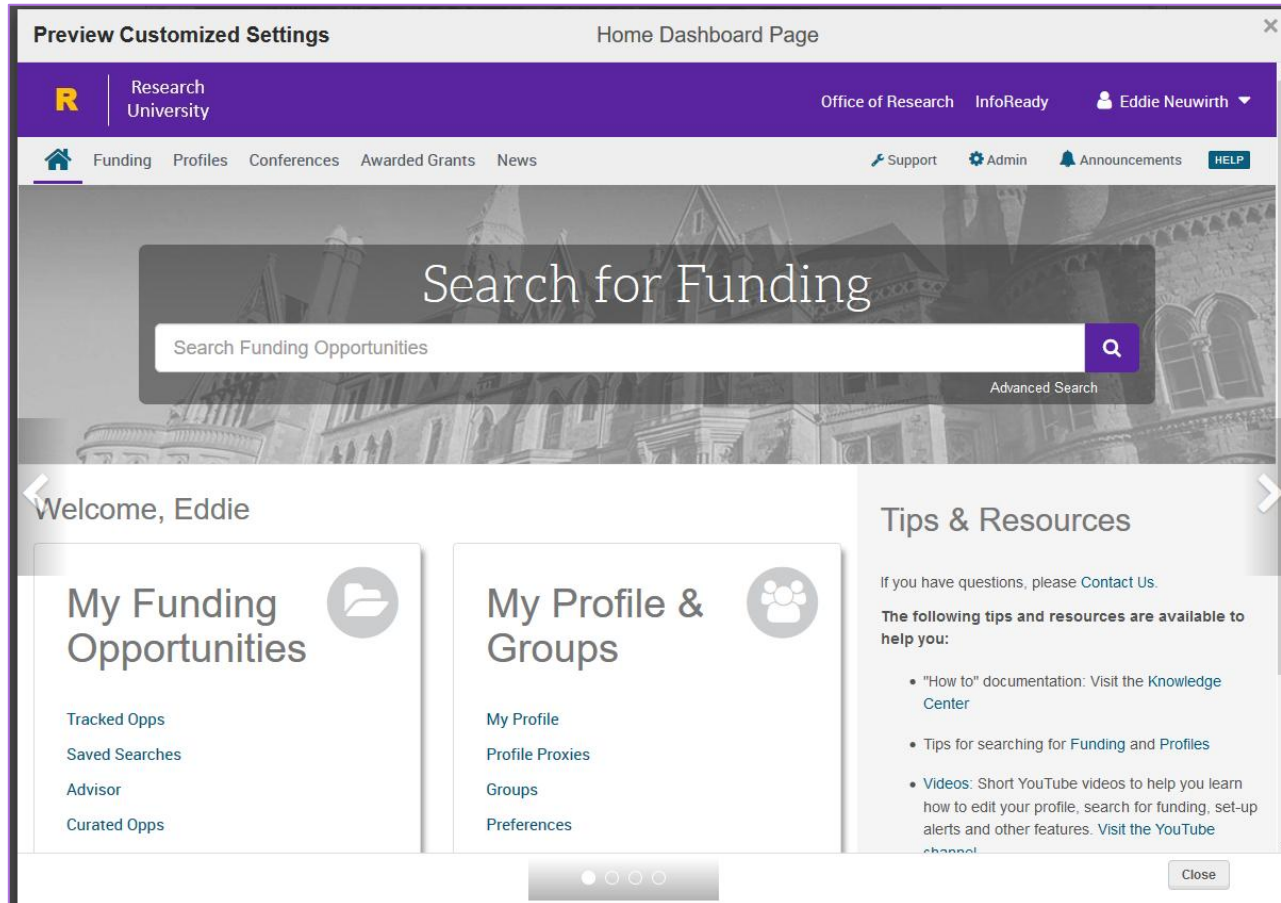
Preview and Save

The most important feature of the customizer tool is the ability to 'Preview' and 'Save' your customization choices. At the bottom of the page select 'Preview' to view what the user interface will look like with the customizations you have made.

Note: No Customization changes will be stored or saved unless you select 'Save Changes'



Preview and Save



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

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

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

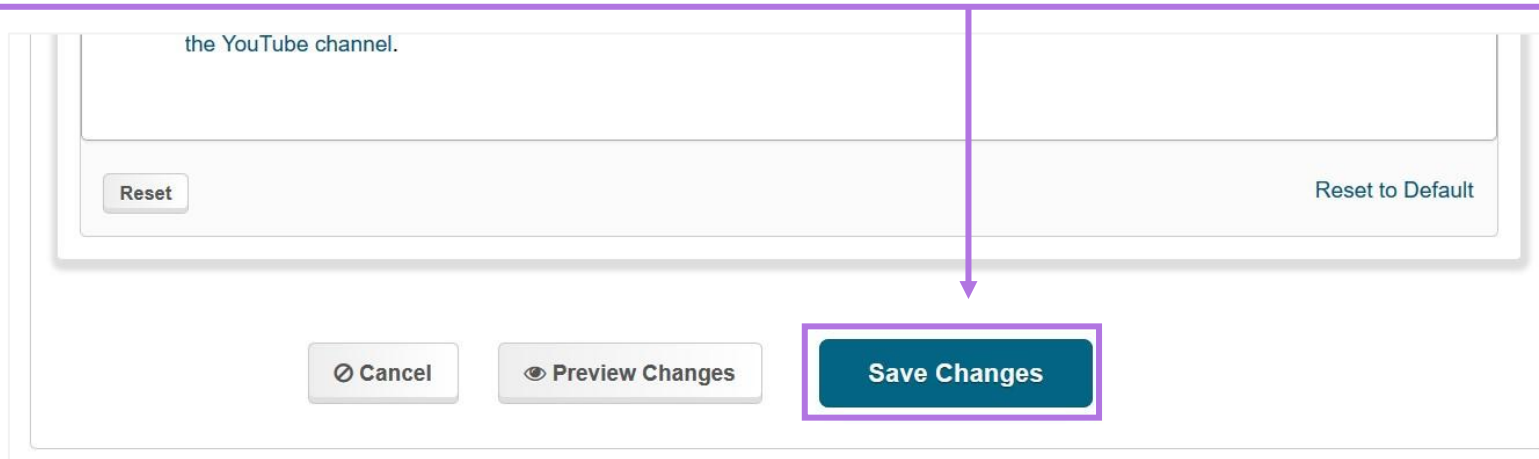
When finished click the "x" or close button to return to the customizer.

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-RP does not store any of your changes unless you select 'Save Changes'.
- Previewing Changes does not do anything to save changes.



Need Additional Help? Contact Support

https://support.proquest.com/s/pivot?language=en_US