



Research Administration Without Boundaries®



SPIN Plus User Guide

June 2015

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Illustrative Prompts

We have scattered some simple illustrative prompts throughout this documentation for easy reference and recognition. Here's a listing of these prompts along with a brief description of each for you to familiarize yourself with and become accustomed to seeing.



**Key
Concept**

This icon is intended to draw attention to a core idea that is necessary to understand in order to fully utilize the software.



**Important
Update**

This icon is intended to draw attention to changes in the software, compared to previous versions.



**Critical
Warning**

This icon is intended to prevent users from taking actions that may create unintended consequences.



**Please
Note**

This icon is intended to draw attention to specific information that users may find especially helpful.



**Quick
Tip**

This icon is intended to draw attention to unique ways the software can be utilized more efficiently.



**For
Example**

This icon is used when the content is describing a particular set of circumstances to show how the software can be used.

Style Conventions

Bold Fonts

Because of the sheer number of setups and screens in the InfoEd Suite, navigating to a particular setup often involves several separate clicks; so, the navigation instructions are abbreviated, such as **Profile > Employment > Add New**. This shorthand representation should be interpreted as such: 'Select Profile, then Select Employment, and then Select Add New'.

In addition, all navigation instructions in this admin manual assume that you are beginning from the New Portal screen. If you are already working in the Old Portal, you should replace "**Administration menu > Facility Management Admin**" in the navigation directions with "**Administration > Facility Management Admin.**"

Words bolded within a sentence are meant to direct you to click on a particular item or link; such as, 'Click on **Profile** to open your profile for examination and/or editing.'

The titles of menus, options, tabs, and other features are shown in bold text, i.e., **Administration Menu, Keyword Groups Option, and Individual Reporting Tab.**

Please Note: Some warnings and notes within the text are written thusly for emphasis.

Cross-Referencing & Links

This document has been enhanced with a myriad of cross-referencing hyperlinks to allow users to more efficiently and effectively navigate their way through the various, interrelated pieces of functionality included in this documentation.

Cross-referencing links have been integrated into the Table of Contents as well as the Table of Figures sections of this document to allow a user to access a desired Section or Figure (screenshot) directly from their respective listing within the Table of Contents or Table of Figures.

Additionally, cross-reference links have also been included within this documentation to refer to an item that appears in another location in the document. For example, you may be reading about the functionality of creating Logging In to SPIN and next to where the screen name is listed we may have included (See Section 3) or (See Section 3, Logging In to SPIN).

A simple listing of the related screenshot Figure and/or Section itself is very helpful in helping navigate your way successfully from screen-to-screen or section-to-section but to make it even easier, not only are the related Figure(s) and Section(s) listed, the numbers of the Section/Figure can be ctrl-clicked for instant access to the related item.

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1 Welcome

InfoEd Global is the premiere provider of software solutions for managing Sponsored programs. Over 600 academic, medical, and scientific institutions around the world rely on us to support and enhance their grant and contract efforts.



InfoEd Global's proven, web-based modules allow our clients to proactively monitor compliance, enhance collaboration, and streamline internal processes.

SPIN was designed to put InfoEd Global clients front and center—it is *the* funding data resource for students, post-docs, faculty, academic staff, and other professionals. As a SPIN user, you have access to a comprehensive warehouse of funding opportunities.

InfoEd Global monitors public and private Sponsors from around the world to ensure that the most current information is always accessible. Within queries and filters, and by selecting from unique options, you will have the power to find exactly what you need now, and easily adjust settings to continue receiving exceptional results as your institution's needs evolve.

SPIN also provides administrators access to institution-wide control of search parameters, as well as tools to share information broadly.

With the addition of SMARTS, both administrators and institution users can enhance the power of SPIN, by establishing custom notification systems to stay on top of current and upcoming opportunities. SMARTS has the additional benefit of allowing administrators to assess and compare how effectively their institution's users are utilizing funding information. This sets the stage for the easy creation of funding goals and promotions.

Welcome to the world's largest database of funding opportunities...let's begin.

2 Accessing SPIN

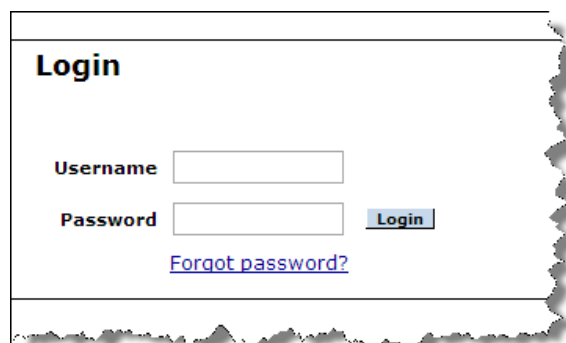
There are two basic entrées into SPIN including:

- Authenticated Access: Where SPIN is accessed by logging in to the application with a GENIUS profile username and password which can be obtained with the assistance of your Administrator. Authenticated users will have the ability to save settings, preferences, and search data.
- Anonymous Access: A standard “anonymous” IP-based access where the SPIN application will allow access to users at subscribing institutions without a username and password as long as they are accessing from an “on-campus” network. Anonymous users do not have the ability to save settings in the SPIN application.

2.1 Authenticated SPIN Access

As mentioned above, some Institutions require their users to login to the SPIN application with an authorized User Name and Password combination on a designated Login Page similar to the one illustrated here.

Figure 1 *SPIN Access Login*

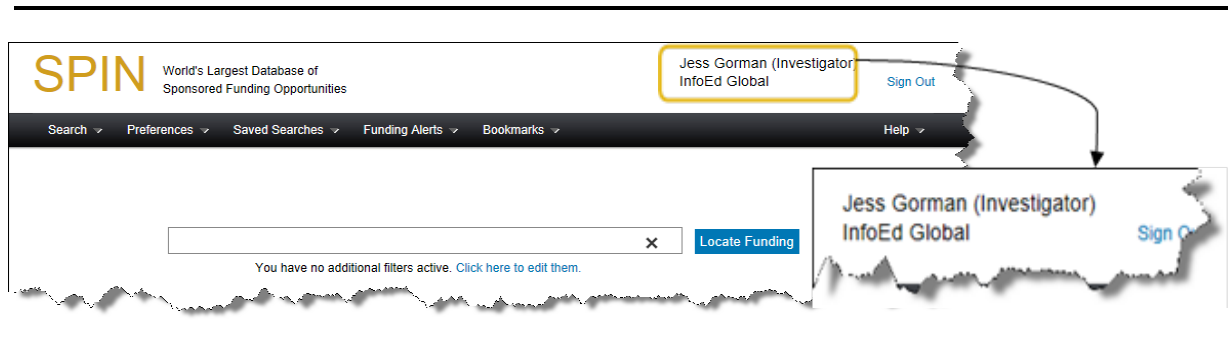


**Please
Note**

Your Login Page may differ in appearance from the one shown above as each Institution may have their own individual login page or mechanism. Also, please keep in mind that which page the user is brought to upon Login Authentication may vary based upon your Institution's InfoEd System setup.

While some Institutions have their users directed straight to the SPIN Home Screen (illustration below), other Institutions direct their users to the InfoEd Portal Page where they must simply select the *SPIN* link at the Left of the Portal page header to gain access to the SPIN Home Screen (below).

Figure 2 *SPIN Home Screen with User Logged In*



As you can see, in the above illustration SPIN is being accessed by an Authenticated Access user (Jessica Gorman) which is designated by her User Name appearing on the right side of the page header (circled in gold) along with the name of her Institution.

For more information on the two methods for logging into SPIN see Section 3, Logging In to SPIN.

2.2 Anonymous SPIN Access

Most institutions allow their users to access the SPIN application as an anonymous user through an "on-campus" network, which means that as long as their computer's IP address is within the range the network administrator provided to InfoEd Global, they will be able to access SPIN. These users will simply launch an internet browser and go to an Institution-provided URL web address to open SPIN.

When SPIN is accessed by an Anonymous Access user, there is no user name included in the SPIN Home Screen header (see Figure 3) because the user has not logged on and been authenticated. The header only contains the Institution's name (circled in gold). Also, anonymous users do not have the ability to save their settings, preferences or search data.

Figure 3 Anonymous Access User – Institution Only Header



Critical Warning

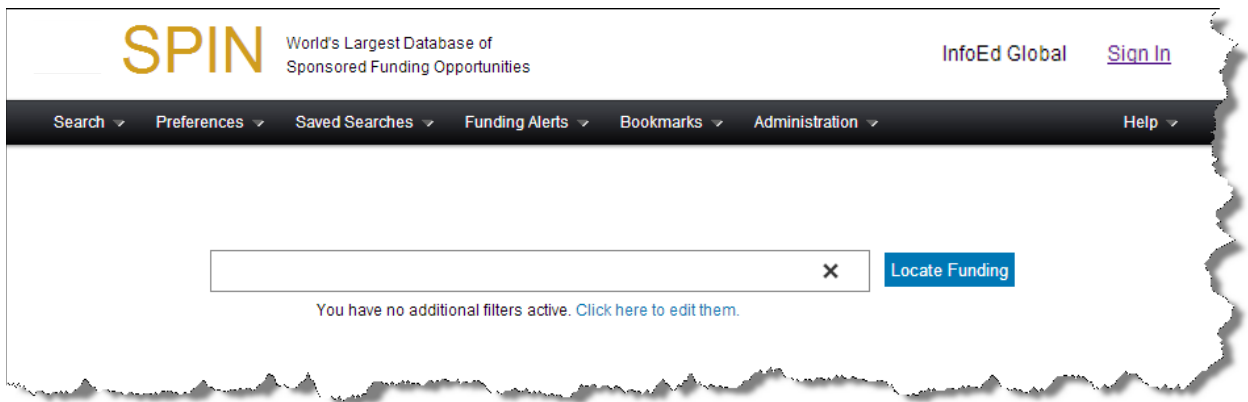
Please see Section 3.1, *Benefits of Authenticated Access to understand which elements of SPIN will not be available to you as an anonymous user.*

Step 1 Type www.infoedglobal.com or your institution’s SPIN URL into your web browser.

The InfoEd Global Website’s home page will appear, as shown in Figure 1 within the previous section (entire page not pictured).

Step 2 Click on the **SPIN** menu link. The SPIN Home Screen will open (Figure 4).

Figure 4 SPIN Home Screen – Anonymous Access



You now have access to the SPIN application. As an anonymous user, you can conduct searches and review returned results, but you will not be able to utilize all of the features described in this manual (see Section 3.1, *Benefits of Authenticated Access*).

3 Logging In to SPIN

As previously mentioned in Section 2, there are multiple ways to access the SPIN application including Authenticated Access where a user must successfully login in order to use the SPIN program. The type of access a SPIN user has depends on the type of license their institution maintains with InfoEd Global. If a user does not know how his or her institution accesses SPIN, he or she should contact their System Administrator.

This section of the manual describes:

- The benefits of Authenticated Access (the benefits to users who log in to SPIN) as opposed to using it anonymously;
- How to access SPIN from the eRA Portal; and
- How to access SPIN from the InfoEd Global Website.

3.1 Benefits of Authenticated Access



Key Concept

InfoEd Global recommends that SPIN users access the system as a logged in user. This recommendation is based upon the fact that logged in users are able to do significantly more with the software.

The following list describes the benefits of logging in (Authenticated Access), as opposed to using SPIN as an anonymous user:

- A logged in user can retain parameters set from the **Category Filters Menu** across multiple sessions (see Section 10.1, Category Filters).
- A logged in user can retain search and detail view parameters set from the **Options Menu** (see Section 10.2, SPIN Preference Menu Search Options).
- A logged in user can save searches and SMARTS settings, and access them repeatedly from the **Saved Searches Menu** (see Section 11, Saved Searches Menu). (Searches shared by an administrator are accessible to anonymous users.)
- A logged in user can bookmark opportunities and share them after navigating away from the opportunity, by using the **Bookmarks Menu** (see Section 13, Bookmarks Menu).

There are two methods for logging in to the SPIN application including:

1. eRA Portal Access – Section 3.1.1
2. InfoEd Global Website Access – Section 3.1.2

3.1.1 Logging In Via eRA Access

If an institution has a subscription for other InfoEd Global modules in addition to SPIN, its users may access and utilize SPIN as a logged in user, via the eRA Portal (see Figure 5).

The following login function will appear in the window frame:

Figure 5 eRA Portal Login Function

The screenshot shows the eRA Portal login interface. At the top, there is a blue banner with the 'infoEd GLOBAL' logo and the text 'eRA Portal Streamlining Electronic Research Administration'. Below this, the word 'Login' is displayed. On the left side, there is a vertical navigation menu with buttons for 'Home', '>> Login', 'SPIN', 'GENIUS', and 'Technology Portal'. The main content area contains a 'Username' input field, a 'Password' input field, a 'Login' button, and a 'Forgot password?' link.

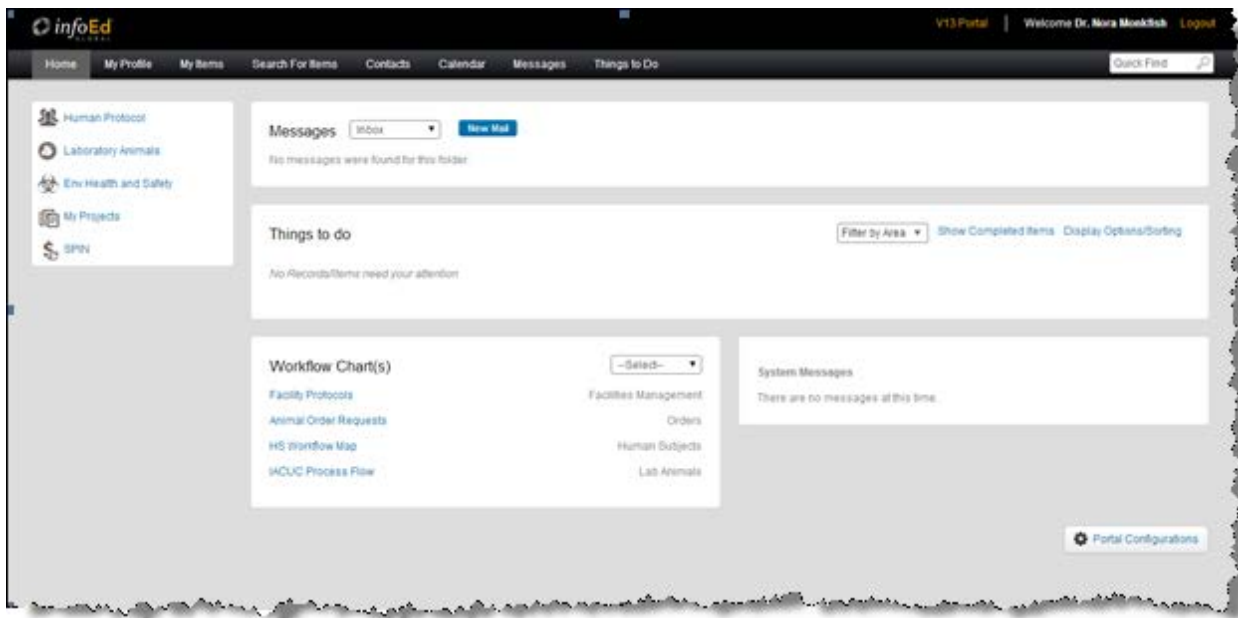
Step 1 Click into the Username Field and type in your Username.

Step 2 Click into the Password Field and type in your Password.

Step 3 Click the **Sign In** button.


You are now logged in to the eRA Portal. A new screen, the InfoEd Home Page (see Figure 6) will appear with open action items and a calendar menu on the right-hand side of the page.

Figure 6 InfoEd Home Page



Please Note

Dependent upon your institution's customizations of the InfoEd Global software, your version of this eRA Portal Page and the InfoEd Home Page may have different colors and/or features.

Step 4 Click the  **SPIN** link located in the bottom left portion of the InfoEd Home Page.

Once clicked, the SPIN Home Screen will open (see Figure 8). You now have full access to the SPIN application.

As a logged in user, you can utilize all of its features, which are described throughout this manual.

3.1.2 InfoEd Global Website Access

If an institution has a paid subscription for SPIN, its users may have the ability to log in to SPIN from the InfoEd Global Website (www.infoedglobal.com).

Step 1 Type www.infoedglobal.com into your web browser.

The InfoEd Global Website's home page will appear, as shown in Figure 7 (entire page not pictured).

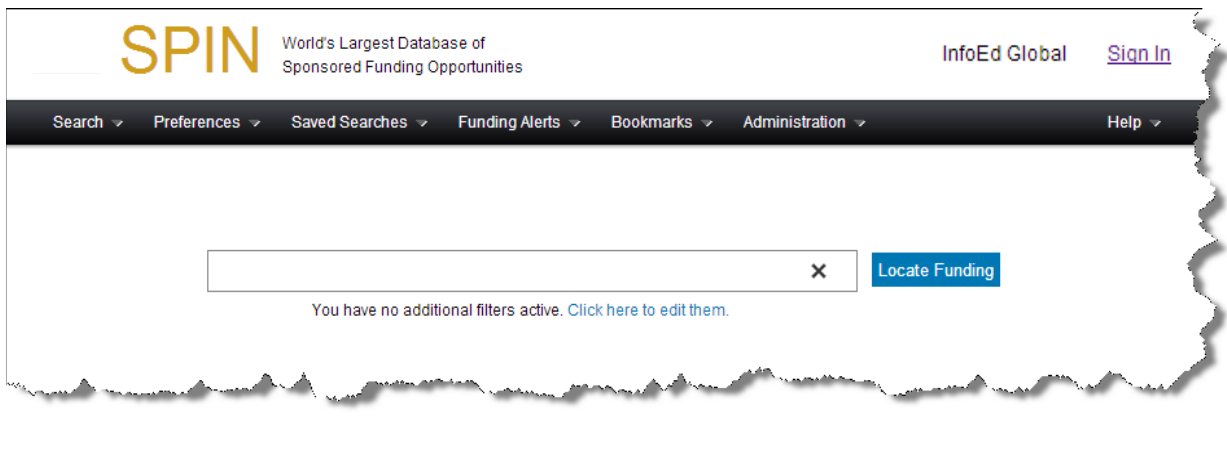
Figure 7 InfoEd Global Website, Home Page



Step 2 Click on the **SPIN** link in the page header that says CLIENT LOGIN TO:.

Once the **SPIN** link has been clicked, the SPIN Home Screen will open (see illustration below).

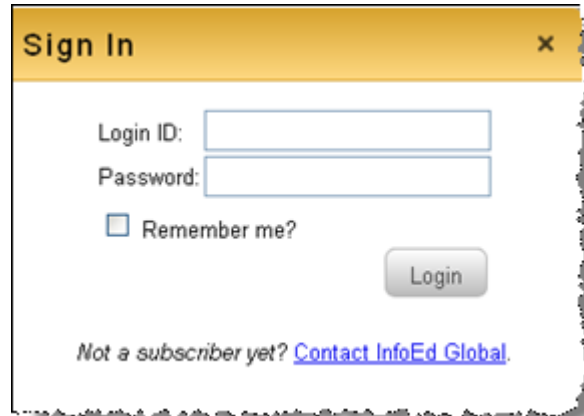
Figure 8 *SPIN Home Screen*



Step 3 Click on [Sign In](#) from the upper, right-hand corner of the screen.

The SPIN Sign In popup shown below will appear:

Figure 9 *SPIN Sign-In Popup*



Step 4 Click into the Login ID field and enter your designated Login ID.

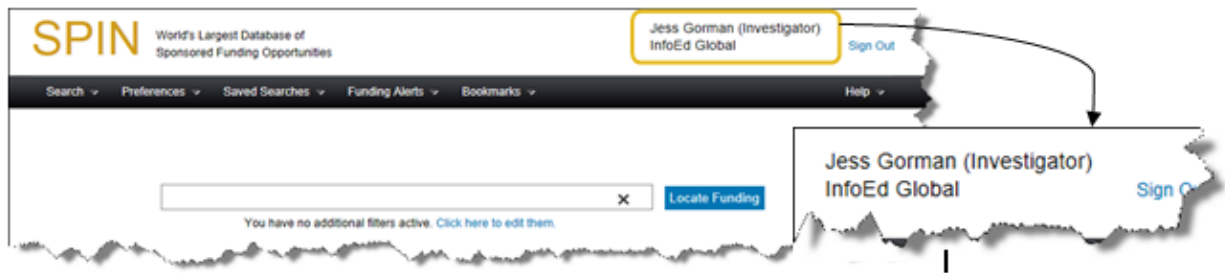
Step 5 Click into the Password field and enter your designated password.

Your password will look like this Password: , as you type. If you would like your password to be automatically entered the next time you enter your Login ID, click the checkbox in the Remember me? area. The indicates that you have opted to have the system remember your password.

Step 6 Click the button.

The SPIN Home Screen will open with you as the designated user with your user name, title and organization appearing in the top right corner of the page (See Figure 10 below).

Figure 10 *SPIN Home Screen with User Logged In*



You now have full access to SPIN. As a logged in user, you can utilize all of its features, which are described throughout this manual.

4 The SPIN Home Screen

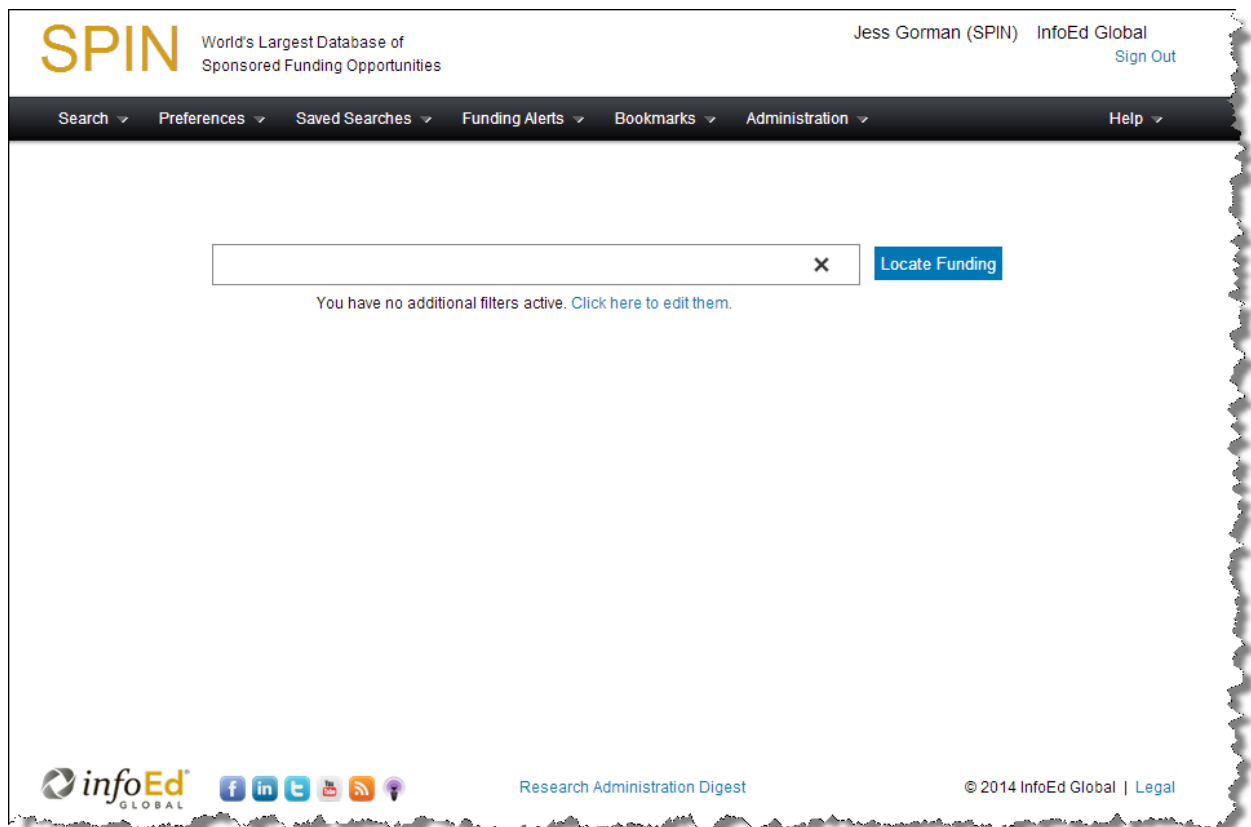
The SPIN Home Screen is the starting point for searching for opportunities, customizing queries, and filtering results to meet your institution's needs. The screen will appear the same to both anonymous and logged in users.

This section of the manual:

- Provides a broad overview of basic features found on the SPIN Home Screen; and,
- Provides a list of SPIN Toolbar components and their associated descriptive sections within this manual.

More information on each of the functions contained on the SPIN Home Screen and how to utilize these features while performing searches can be found in Section 4, The SPIN Home Screen.

Figure 11 *SPIN Home Page*



The SPIN Home Screen has three static components, not including the search mode functionality located in the middle of the screen which varies based upon what search mode is selected by the user.

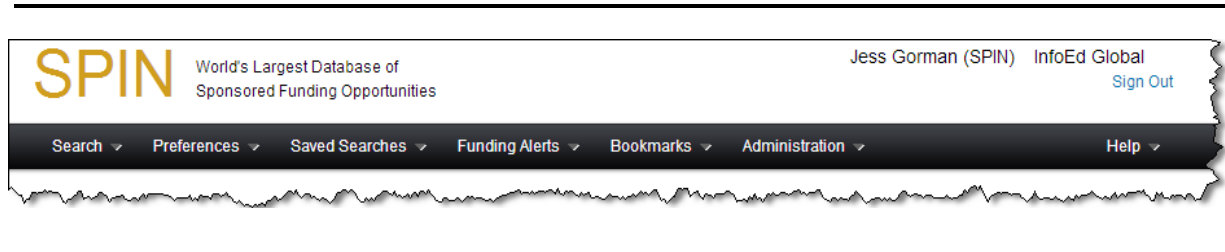
These three static Home Screen components are:

- SPIN Home Screen Header (Section 4.1)
- SPIN Home Screen Footer (Section 4.2)
- SPIN Toolbar (Section 4.3)

4.1 SPIN Home Screen Header


The SPIN Home Screen Header is located at the top of the screen and it has several features that the user may find useful.

Figure 12 **The SPIN Home Screen Header**



The table below describes each feature on the SPIN Home Screen Header:

InfoEd Spin Insignia	Clicking on the SPIN insignia in the left, top portion of the header refreshes the SPIN Home Screen.
User Name	<p>The user's name (if an Authenticated User) is shown in the right top portion of the SPIN Home Screen Header.</p> <p>For example, in the illustration above Jess Gorman is listed as the user.</p> <p>No name will appear in this space if the user has accessed SPIN anonymously.</p>

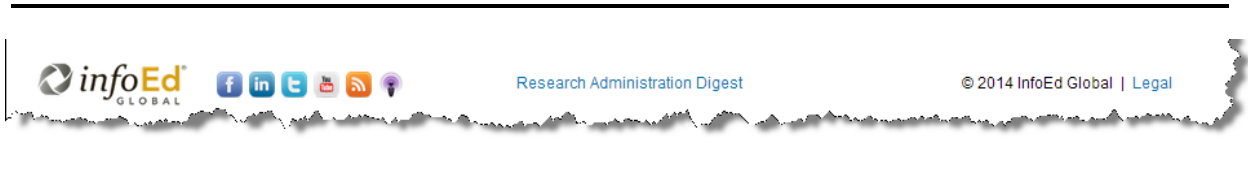
<p>Institution Name</p>	<p>The Institution Name is shown in the right top portion of the SPIN Home Screen Header regardless of whether the user is an Authenticated User or an Anonymous User.</p> <p>For example, in the illustration above InfoEd Global is listed as the Institution and this Institution Name will be present in the Header regardless of how the user accessed the SPIN Application.</p>
<p>Sign In/Out Link</p>	<p>If a user accesses SPIN anonymously, a link in the upper, right-hand corner of the page will be Sign In .</p> <p>See Section 3.1.2—InfoEd Global Website Access for instructions on using the Sign In Popup.</p> <p>If a user is logged in, the link will be Sign Out .</p> <p>When a user clicks on this link, a Sign Out popup with <input type="button" value="Yes"/> and <input type="button" value="No"/> options will appear asking for confirmation of the user's request to sign out.</p>
<p>Logo Footer</p>	<p>Clicking on the logo  located at the bottom, right-hand corner of the page will take the user back to InfoEd Global Website's home page.</p>

*This link only appears if a user is signed in as an administrator.









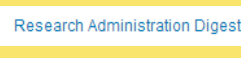
4.2 SPIN Home Screen Footer

The SPIN Home Screen Footer is located at the top of the screen and it also has several features that the user may find useful.

Figure 13 **The SPIN Home Screen Footer**



The table below describes each feature on the SPIN Home Screen Footer:

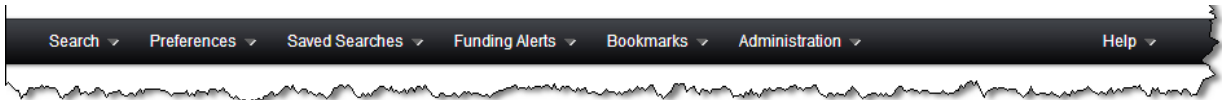
 (Footer Logo)	Clicking on the logo  located at the bottom, right-hand corner of the page will take the user back to InfoEd Global Website's home page.
	Link to InfoEd's Facebook page.
	Link to InfoEd's Linked In page.
	Link to InfoEd's Twitter page.
	Link to InfoEd's You Tube page.
	Link to our Social RRS site where you can subscribe to InfoEd's RSS feed.
	Link to our InfoEd research administration podcasts.
	Link to the Research Administration Digest site where users can access podcasts, articles, and special presentations about the Research Administration realm.

4.3 The SPIN Toolbar

The core functions of SPIN are accessed from the toolbar on SPIN's Home Screen. The toolbar is shown below in Figure 14.

This section lists, but does not describe, the core functional components of SPIN, which allow users to customize the SPIN experience. Subsequent sections of this document provide thorough instructions for each component's use. These are cross-referenced below, and the Sections have titles that match each core toolbar component.

Figure 14 **The SPIN Toolbar**



The SPIN Toolbar contains seven* menus:

- Search Menu (Section 5)
- Preferences Menu (Section 10)
- Saved Searches Menu (Section 11)
- Funding Alerts Menu (Section 12)*
- Bookmarks Menu (Section 13)
- Administration Menu (Section 14)**
- Help Menu (Section 15)

The **Funding Alerts Menu only appears for Authenticated Access users who are logged in.

*The **Administration Menu** only appears to users who are logged in as Administrators.

5 The Search Menu

The first menu on the SPIN Toolbar is the Search Menu which has been delineated into two sections.

1. The Search Modes are located on the top portion of the menu:
 - Basic Search (Section 5.1.1)
 - InfoEd Keyword Search (Section 5.1.2)
 - Advanced Search (Section 5.1.3)
2. The Quick Searches Search Options are located on the bottom portion of the menu:
 - New/Modified Opportunities (Section 5.2.1)
 - Impending Deadlines (Section 5.2.2)
 - FedBiz Opps (US) (Section 5.2.3)
 - Federal Register Guide (US) (Section 5.2.4)
 - Non-Traditional Sources (Section 5.2.5)

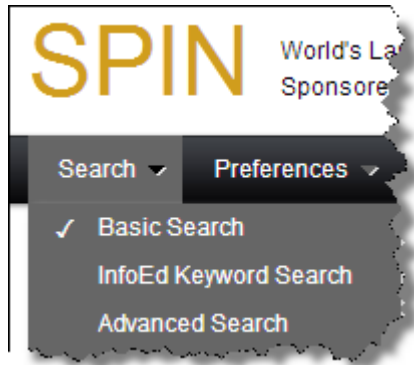
Figure 15 Search Menu Items



5.1 SPIN Search Modes

Again, the top portion of the Search Menu contains options for the three separate SPIN search modes, the first of which is the defaulted Basic Search (see Figure 16).

Figure 16 SPIN Search Menu – Search Mode Menu Options



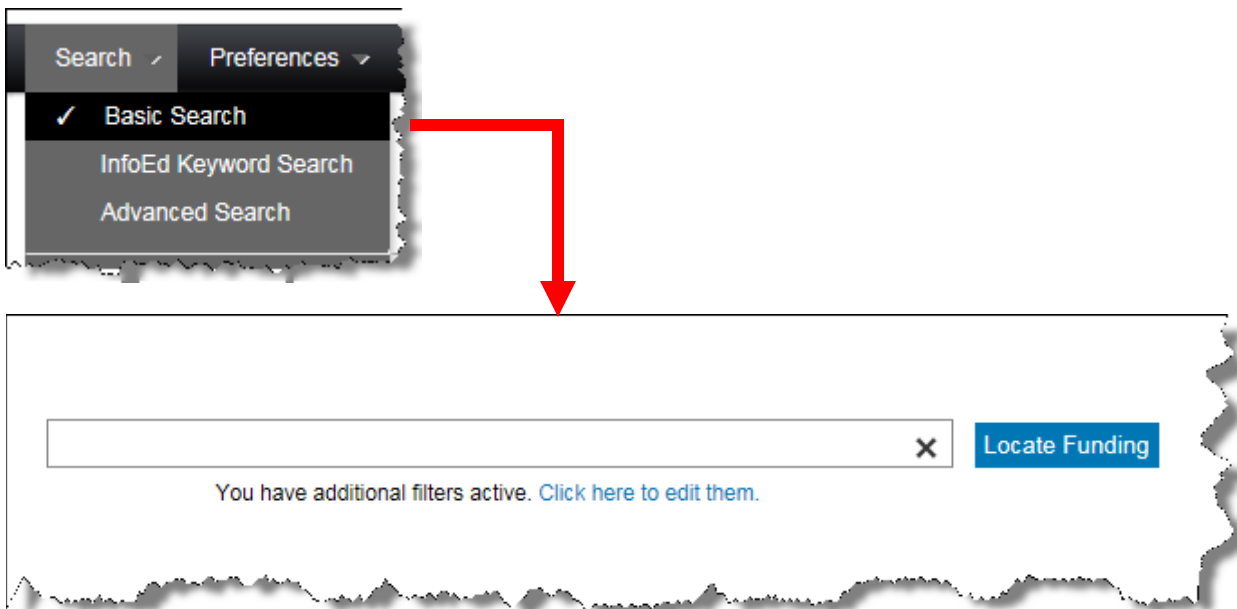
5.1.1 Basic Search Mode

This is the defaulted search mode upon first access or refresh of the SPIN application. The Basic Search is a way to search for programs using a simple word or term which is then run against the entire SPIN record – every field is searched (ex. Sponsor Name, Opportunity Title, Funding Opportunity Number, CFDA Number, Synopsis, Eligibility, Keywords, etc.).

The system will refresh to whatever search mode you were last in. It does not return you automatically to the Basic Search.

Figure 17

Basic Search



When Basic search mode is selected (illustration above), a standard entry textbox appears in the middle of the SPIN Home Screen where you can enter your search term(s) to perform a simple SPIN search.



For Example

If the user enters the word 'Cancer' in the search textbox, when 'Locate Funding' is clicked, the system will retrieve search results for any SPIN sponsored program record with the word 'cancer' in any field including Opportunity Title, Sponsor Name, Synopsis etc.

For more information on this Basic Search mode see Section 6, Conducting a Basic Search.

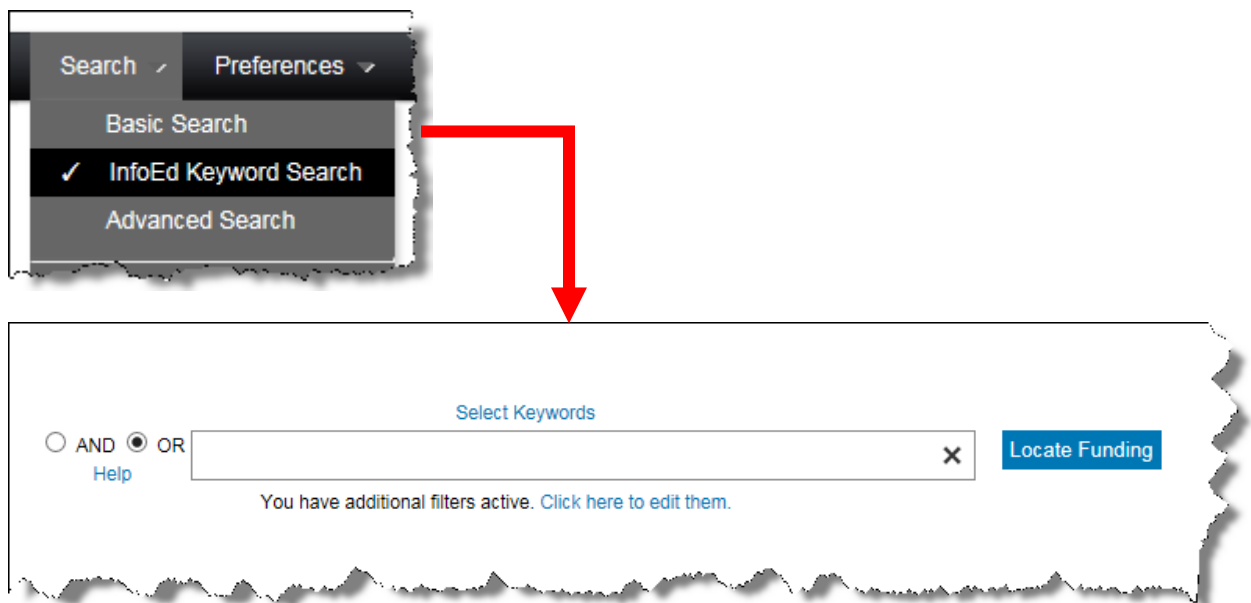
5.1.2 InfoEd Keyword Search Mode

The InfoEd Keyword Search mode operates in a similar manner to the Basic Search except you select from a proprietary list of keywords to perform your search instead of typing in arbitrary word(s) or term(s).

For this mechanism, InfoEd maintains its own proprietary curated list of search terms called the *InfoEd Keyword List* which you can select from to execute your sponsored program search.

When InfoEd Keyword search mode is selected (Figure 18), the standard search textbox appears along with a Select Keywords (blue) link and an AND/OR selector.

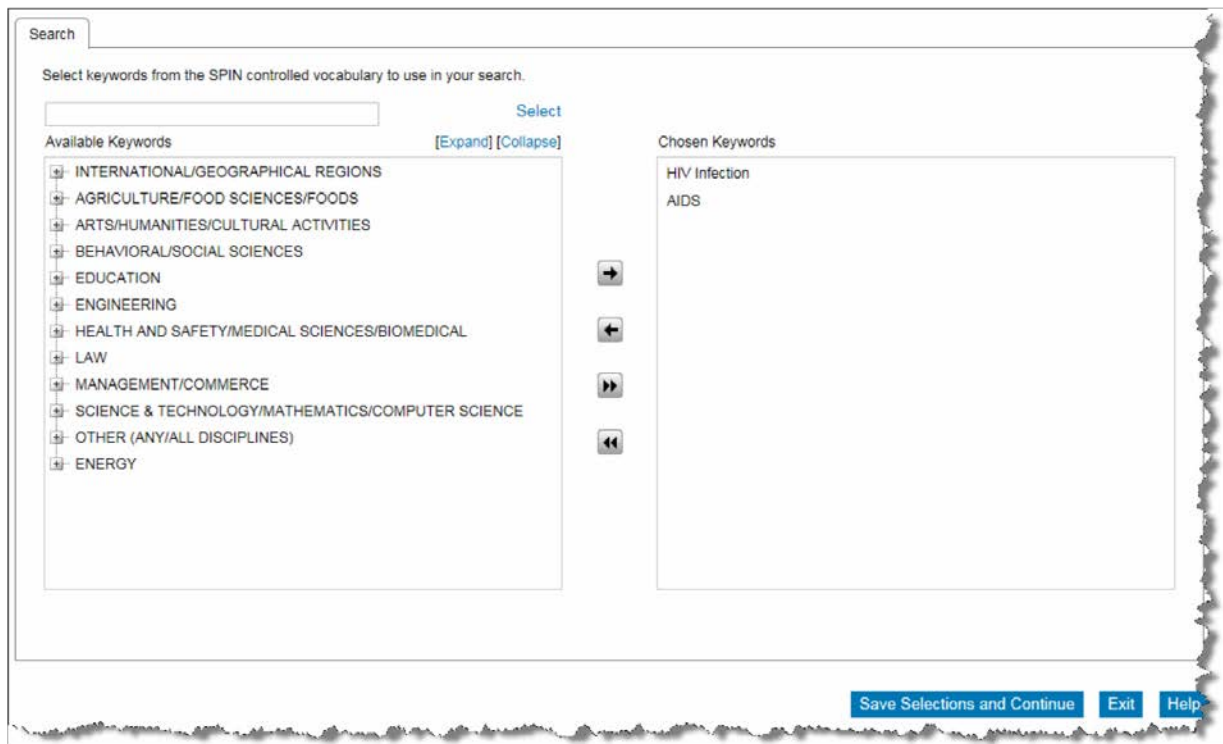
Figure 18 InfoEd Keyword Search



The user clicks the Select Keywords (blue link) above the search box to access the Select Keywords popup (Figure 19).

Figure 19

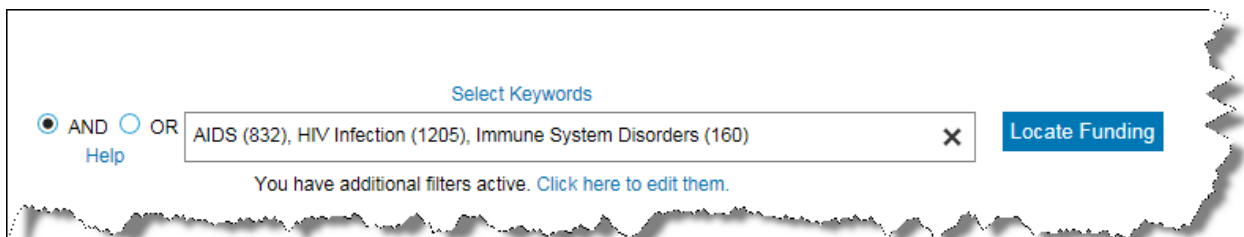
InfoEd Keyword Select Keyword Popup



After selecting their desired keyword(s), the user will click the Save Selection and Continue button, which will close the popup and display the selected terms in the SPIN search box.

Figure 20

InfoEd Keyword Search – Keywords Selected



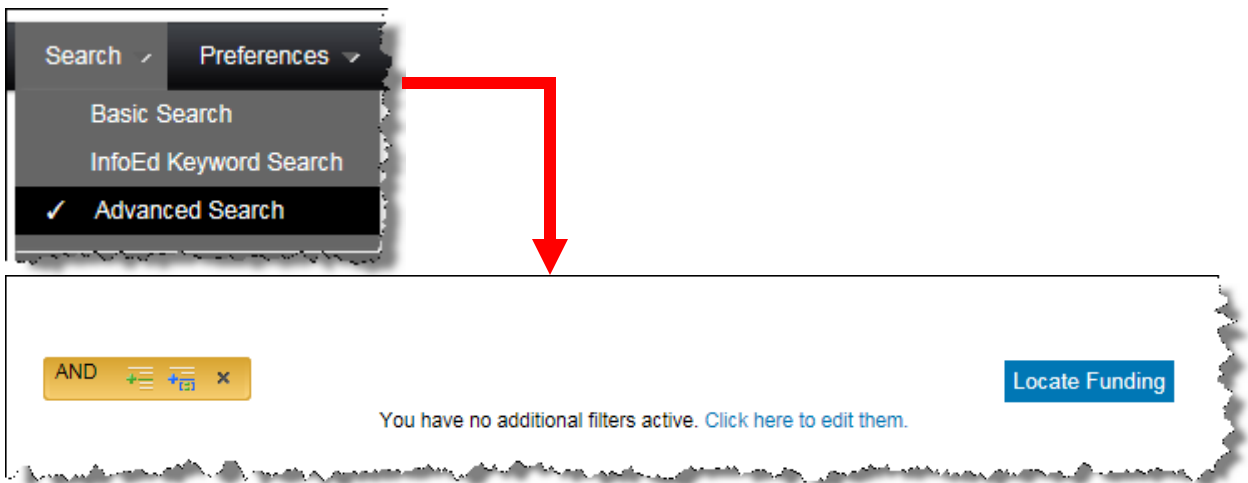
After selecting whether they'd like the search mechanism to use AND (more exclusive) or OR logic (more inclusive), they would simply click the Locate Funding to carry out the search. In this mode, the selected terms are being compared with keyword terms associated with each funding opportunity rather than the full text of the opportunity.

For more information on this InfoEd Keyword Search mode see Section 7, Conducting an InfoEd Keyword Search.

5.1.3 Advanced Search Mode

Another way to search for results is to use the Advanced Search. This customized search method allows you to tailor your search using advanced AND/OR branching logic functions to narrow down your search to retrieve more specific results.

Figure 21 **Advanced Search**

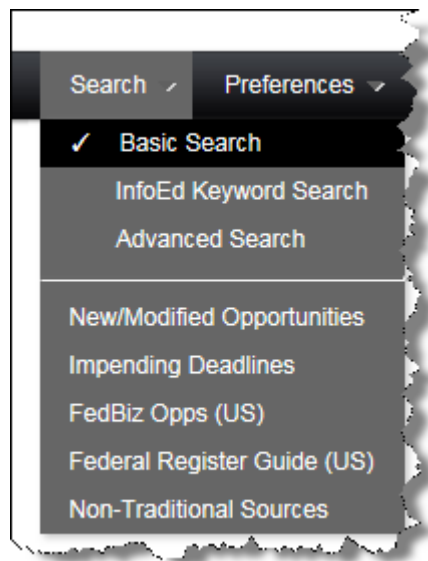


For more information on this Advanced Search mode see Section 8 – Conducting an Advanced Search.

5.1.4 Changing Modes Using The Search Menu

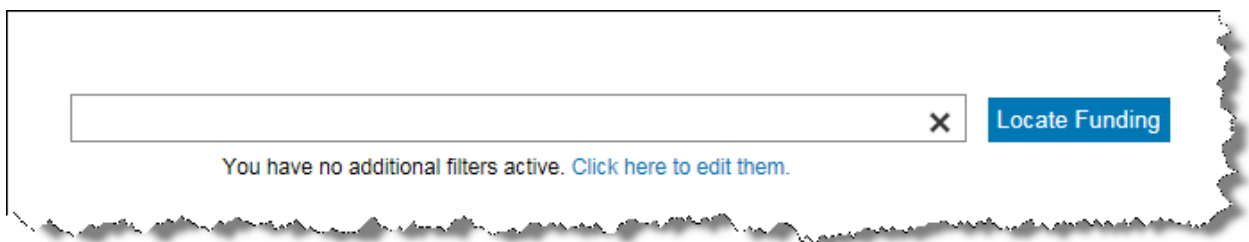
The SPIN Home Screen defaults to a “Basic Search” search mode. This mode is designated by the white checkmark as illustrated below.

Figure 22 *Basic Search Designation*



When SPIN is in this Basic mode, a blank field is present on the screen as shown below. This field allows users to enter one or more search terms.

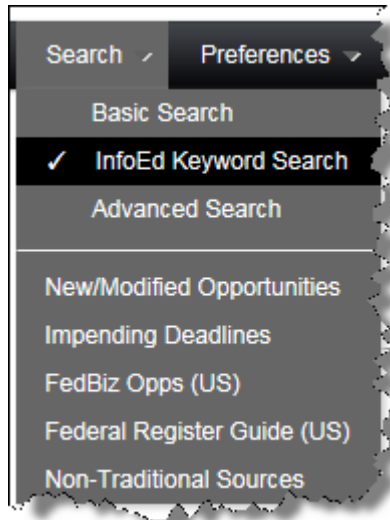
Figure 23 *SPIN Home Page - Basic Search Function*



See Section 6 —Conducting a Basic Search for instructions on utilizing this search mode.

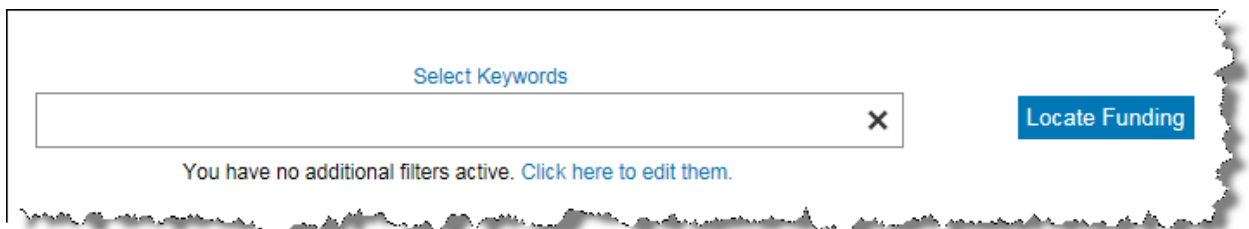
SPIN users have the option to switch between search modes to “InfoEd Keyword Search” or “Advanced Search.” When selected, the white checkmark will appear designating the specified search mode. Below, the Search Mode has been changed to InfoEd Keyword Search.

Figure 24 Search Menu – InfoEd Keyword Designation



When SPIN is in this mode, the blank field and Locate Funding button present in the Basic Search remains but above it there is a Select Keywords link. This function opens a window where users designate their keyword search term(s).

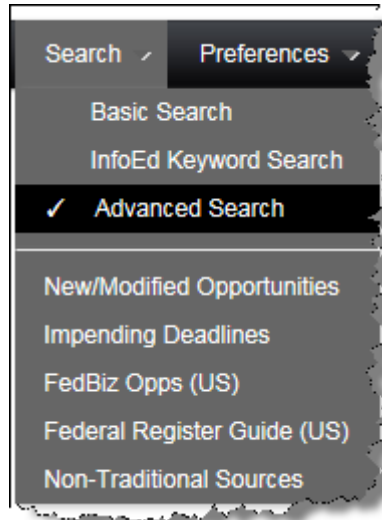
Figure 25 SPIN Home Page – InfoEd Keyword Function



See Section 7 —Conducting an InfoEd Keyword Search for instructions on how to switch to and utilize the keyword search mode.

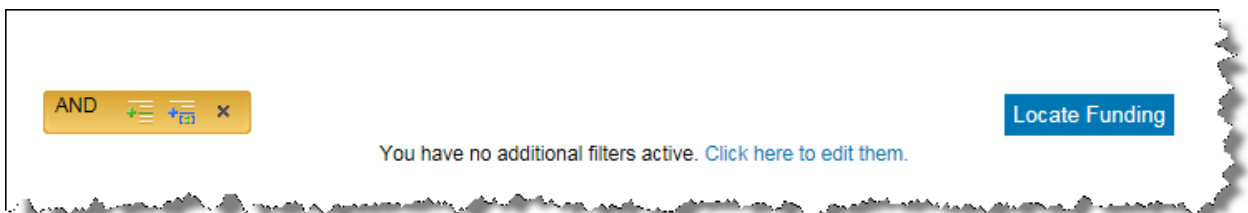
Again, SPIN users have the option to switch the search mode to “Advanced Search.” When selected, the white checkmark will appear designating the Advance Search mode.

Figure 26 Search Menu – Advanced Search Designation



When SPIN is in this mode, the blank field disappears, and an AND/OR function become present on the screen as shown below. This function allows users to utilize and AND/OR Logic Function to attach more specific limitations to their entered search term(s).

Figure 27 SPIN Home Page – Advanced Search Function



See Section 8 —Conducting an Advanced Search for instructions on how to switch to and utilize the advanced search mode.

5.1.5 Saving Search Parameters

After SPIN users have designed and conducted custom searches via the Basic Search, InfoEd Keyword Search or Advanced Search Modes, the parameters that were set up can be retained and used again at another time. This is referred to as saving search parameters.

As your funding goals and approaches evolve, saving search parameters allows SPIN users to re-run well-designed searches, alter them, and re-name them at will. These abilities are also important when it comes to Sponsors adding new or revising existing opportunities.

Saving and naming search parameters also allows SPIN users to utilize SMARTS Email Notifications.

From either the Basic, InfoEd Keyword or Advanced Search Mode:

Step 1 Click the **Save** button. A popup window entitled “Save Current Search” will appear within the returned results, as depicted in Figure 28.

Figure 28 Save Current Search Popup

Save Current Search

Name

Would you like to configure SMARTS™ automation? [Help](#)
Note: This can be setup or edited under Funding Alerts later.

Receive email updates?

Update frequency



**Please
Note**

The Save Icon is only available to logged in SPIN users. Anonymous users cannot retain search parameters for future use.

5.1.5.1 Naming a Search as New

Users can save search parameters by entering a new name for their search into SPIN, or by overriding the parameters attached to a previously saved and named search.

Naming a search as new involves either:

- Users saving the parameters for terms they have never looked for before, and naming those; or,
- Users altering a set of existing, baseline search parameters for a term/topic they search regularly and giving the search a new and slightly different name.

The latter is very similar to using the “Save As” feature in standard word processing software.

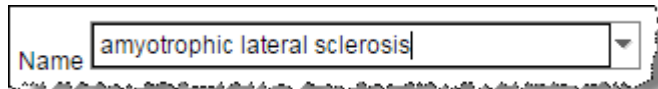
5.1.5.2 Naming an Entirely New Search

In this example, we are going to save the search parameters we set up for “amyotrophic lateral sclerosis.” It is a new search—in this context that means that under this login name, the search as currently designed has never been saved before.

Step 1 Click into the blank Name Field.

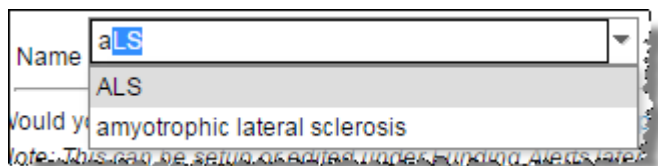


Step 2 Type a name for your search.



As you type, a list will appear beneath the blank field if the letters you type are similar to previously-saved searches, as depicted below.

Step 3 Avoid selecting a name from this list, and continue typing your new name.

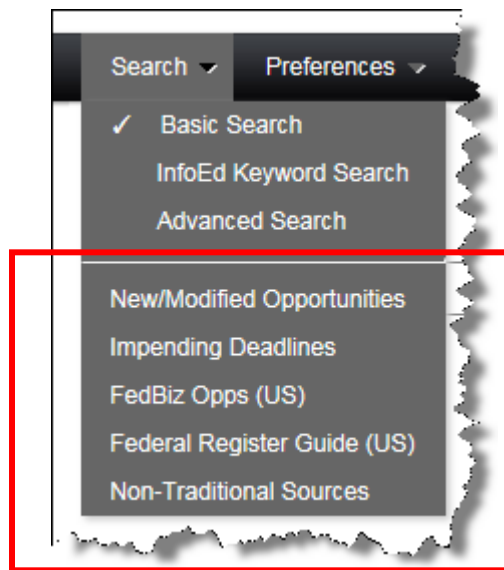


5.2 SPIN Quick Searches

As previously mentioned, the bottom portion of the Search Menu contains a few SPIN Quick Searches – pre configured searches to get you to five commonly employed SPIN search options:

- New/Modified Opportunities
- Impending Deadlines
- FedBiz Opps (US)
- Federal Register Guide (US)
- Non-Traditional Sources

Figure 29 *SPIN Search Menu – Quick Searches Menu Items*

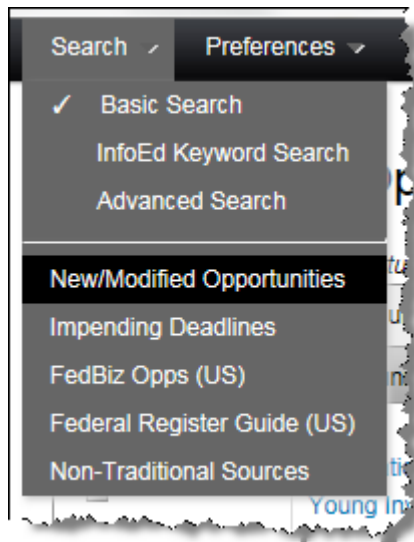


5.2.1 New/Modified Opportunities

The New/Modified Opportunities Quick Search (see Figure 32) presents displaying opportunities that have been entered/modified within the past seven (7) days.

To review New/Modified opportunities directly:

Step 1 Go to the **Search** ▾ Menu on the SPIN Toolbar. The menu is expansive including both Search Modes in the top half and Quick Searches on the bottom half. New/Modified Opportunities is one of these Quick Searches.



Step 2 Click on the New/Modified Opportunities menu item.

The New/Modified Opportunities screen opens to a list of opportunities entered or modified in the past 7 days for your review, organized by ascending SPIN ID, as shown in Figure 30 below.

Figure 30

New/Modified Opportunities Screen

New/Modified Opportunities

(Displaying new/modified opportunities over the past seven (7) days.)

Group by: drag and drop a column header to this section

	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount *	Bookmark
+	00700	Grass Foundation/AES Young Investigator Travel Award	American Epilepsy Society		10-Jun-2015	1,000.00	+
+	01469	Frank Isakson Prize for Optical Effects in Solids	American Physical Society		01-Jul-2015	5,000.00	+
+	03007	Brower Youth Awards	Earth Island Institute		18-May-2015	3,000.00	+
+	03231	Literature Awards - Award for Sustained Contributions	American Society of Health-Systems Pharmacists Foundation		05-Jun-2015	Not Specified	+
+	03238	Sponsored Research Program	Project Management Institute		25-Apr-2015	50,000.00	+
+	03240	Examples of Excelencia	Excelencia in Education		24-Apr-2015	5,000.00	+
+	03354	Young Pharmacists Group Grant for Professional Innovation	International Pharmaceutical Federation		01-Apr-2015	1,083.88	+
+	03442	Physicians of Tomorrow	American Medical Association		29-May-2015	10,000.00	+

The features of this screen are similar to those previously outlined in this manual, and include:

- The ability to drag and drop columns to reorganize data;
- The ability to filter information using the filter icon;
- The ability to use arrows to change the order of presented data between ascending and descending, and vice versa;
- The ability to use View Details Arrows to reveal and hide information; and,
- The ability to export information to MS Word™ or MS Excel™.

To review these features:

See Section 9.1—Exploring & Organizing Results, for more information on how to sort, filter, and manipulate the data on the US Federal Business Opportunities Screen.

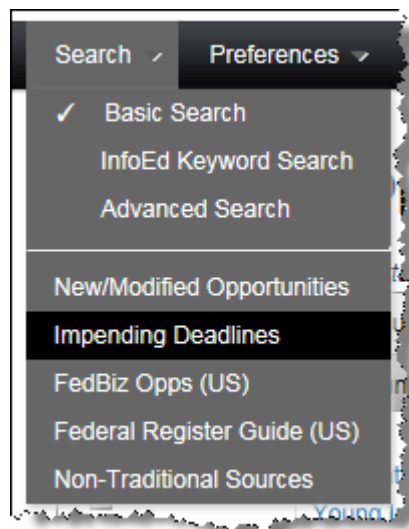
See Section 9.7—Exporting Results, for more information on how to export data from this screen.

5.2.2 Impending Deadlines

The Impending Deadlines Quick Search (see Figure 32) presents opportunities with deadlines within the next 8 weeks or with open deadlines.

To review Impending Deadlines opportunities directly:

Step 1 Go to the **Search** ▾ Menu on the SPIN Toolbar. The menu is expansive including both Search Modes in the top half and Quick Searches on the bottom half. Impending Deadlines is one of these Quick Searches.



Step 2 Click on the Impending Deadlines menu item.

The screen opens to a display opportunities with open or deadlines within the next 8 weeks for your review, organized by Ascending SPIN ID, as shown in Figure 31 below.

Figure 31

Impending Deadlines Screen

Impending Deadlines

(Displaying opportunities with deadlines in the next 8 weeks or with open deadlines.)

Group by: drag and drop a column header to this section

	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount *	Bookmark
+	00045	New Directions (ND) Grants	American Chemical Society		13-Mar-2015	110,000.00	+
+	00055	Research Fellowship Awards	Crohn's & Colitis Foundation of America		01-May-2015	Not Specified	+
+	00078	Douglas Haskell Award for Student Journals	Center For Architecture Foundation		01-May-2015	2,000.00	+
+	00093	Electronics, Photonics, and Magnetic Devices (EPMD)	Directorate for Engineering/NSF	PD-13-1517	01-Apr-2015	Not Specified	+
+	00159	Grants	Ford Foundation		Continuous Submission	Not Specified	+
+	00168	International Cancer Technology Transfer Fellowships (ICRETT)	Union for International Cancer Control (UICC)		Continuous Submission	3,400.00	+

The features of this screen are similar to those previously outlined in this manual, and include:

- The ability to drag and drop columns to reorganize data;
- The ability to filter information using the filter icon;
- The ability to use arrows to change the order of presented data between ascending and descending, and vice versa;
- The ability to use View Details Arrows to reveal and hide information; and,
- The ability to export information to MS Word™ or MS Excel™.

To review these features:

See Section 9.1—Exploring & Organizing Results, for more information on how to sort, filter, and manipulate the data on the US Federal Business Opportunities Screen.

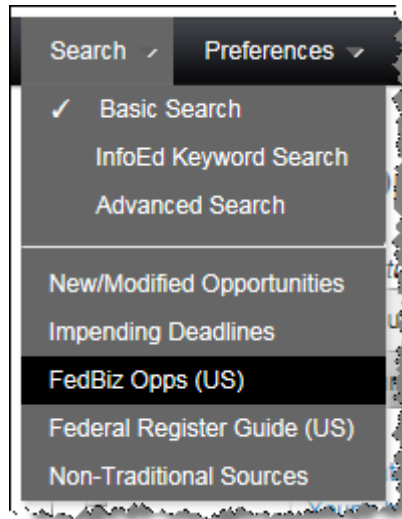
See Section 9.7—Exporting Results, for more information on how to export data from this screen.

5.2.3 FedBiz Opps (US)

The Browse FedBizOpps Quick Searches Option (see Figure 32) presents Federally-Sponsored opportunities which are often not listed on Grants.gov, and which tend to have strict eligibility requirements. These same opportunities may appear during other searches; they are included in the full SPIN database.

To review federally-sponsored opportunities directly:

Step 1 Go to the **Search** ▾ Menu on the SPIN Toolbar. The menu is expansive including both Search Modes in the top half and Quick Searches on the bottom half. FedBiz Opps (US) is one of these Search Options.



Step 2 Click on the FedBiz Opps (US) menu item.

The screen opens to a display of Federally-Sponsored opportunities for your review, organized by descending date, as shown in Figure 32 below.

Figure 32

US Federal Business Opportunities Screen

US Federal Business Opportunities

Export ▾

▾ Last Updated ✕

SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount	Last Updated
46267	RFP -- Hybrid-Cycle Power and Thermal Management System (PTMS) Development	Department of the Air Force	BAA-RQKP-2015-0002	03-Apr-2015		09-Mar-2015
46272	RFP -- Bat Survey for the Allegheny National Forest	Forest Service/Department of Agriculture	AG-24H8-S-15-0025	09-Apr-2015		09-Mar-2015
45116	RFP -- AMENDMENT -- SBSA -- SBIR Topic 156 Development of a Standardized Electronic Cigarette or Clin	National Institute on Drug Abuse/NIH/DHHS	N43DA-16-8925	20-Apr-2015		09-Mar-2015

The features of this screen are similar to those previously outlined in this manual, and include:

- The ability to drag and drop columns to reorganize data;
- The ability to filter information using the filter icon;
- The ability to use arrows to change the order of presented data between ascending and descending, and vice versa;
- The ability to use View Details Arrows to reveal and hide information; and,
- The ability to export information to MS Word™ or MS Excel™.

To review these features:

See Section 9.1—Exploring & Organizing Results, for more information on how to sort, filter, and manipulate the data on the US Federal Business Opportunities Screen.

See Section 9.7—Exporting Results, for more information on how to export data from this screen.

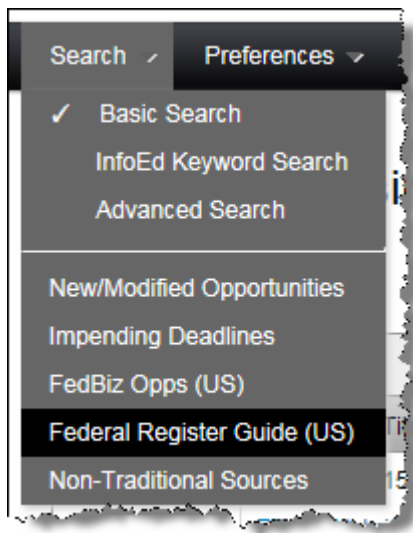
5.2.4 Federal Register Guide

The US Federal Register Guide Quick Search Option provides users with access to pared-down grants information that is most relevant to InfoEd Global's client base.

The information is published by the National Archives and Records Administration. Accessing such information directly from the United States Federal Register Website can be difficult, as their listings are extensive, and include more than just grants. SPIN provides a quick way to obtain essential data via this menu option.

To review listings from the US Federal Register Guide directly:

Step 1 Go to the **Search** Menu on the SPIN Toolbar. The menu is expansive including both Search Modes in the top half and Quick Searches on the bottom half. Federal Register Guide is one of these Quick Searches.

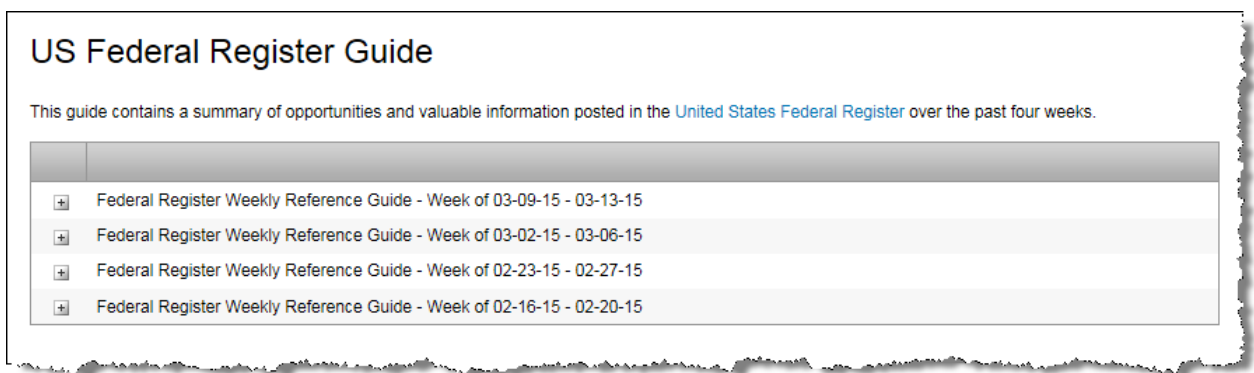


Step 2 Click the Federal Register Guide (US) menu link.

The US Federal Register Guide screen opens to a display of Federal Register Weekly Reference Guides, organized by descending date, as shown in Figure 33 below.

Figure 33

US Federal Register Guide Screen



By default, the last four weeks of programs are listed on this page in descending order.

Users can use the View Details Arrows to reveal and hide information under each heading (see Section 9.1—Exploring and Organizing Results).

A direct link to the Federal Register Website is also provided at the top of the page.

5.2.5 Non-Traditional Sources

This menu link provides a listing of non-traditional research funding sources including 'crowdfunding' opportunities.



**Critical
Warning**

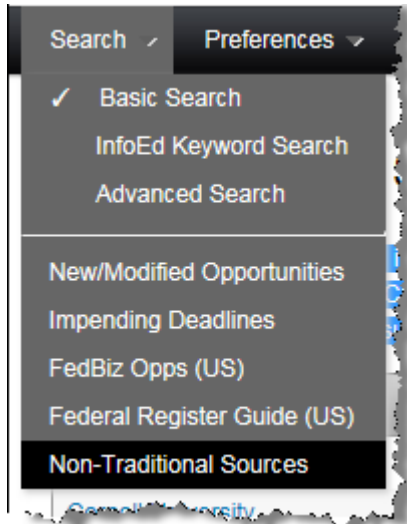
These links and this information are provided as a helpful resource for researchers.

InfoEd Global does not investigate these organizations and groups and makes no claims as to their business practices nor their appropriateness for your endeavor.

Please investigate each entity carefully before proceeding to work with them.

To review these non-traditional listings:

Step 1 Go to the **Search** Menu on the SPIN Toolbar. The menu is expansive including both Search Modes in the top half and Quick Searches on the bottom half. Non-Traditional Sources is one of these Quick Searches.



Step 2 Click the Non-Traditional Sources menu link.

The Non-Traditional Sources screen opens to a display of crowd-funding and other miscellaneous opportunities, organized by alphabetically by Organization, as shown in Figure 33 below.

Figure 34

Non-Traditional Sources Screen

Non-Traditional Sources

While crowdfunding of research is a growing trend, there are some considerations one should take into account first, as explained in this article from the [Chronicle of Higher Education](#). Crowdfunding sites appear and disappear on an ongoing basis. Please feel free to let us know of other sites you think should be included or broken links at spinsupport@infoedglobal.com. Good luck funding your research projects!

Organization	Type
Arizona State University	Crowd Funding - University Site
Cornell University	Crowd Funding - University Site
Georgia Tech Starter	Crowd Funding - University Site
Idea connection	Industry Technology Scouting
Indiegogo	Crowd Funding - General Projects
Experiment	Crowd Funding - Science Projects
PETRIDISH	Crowd Funding - Science Projects
RocketHub	Crowd Funding - General Projects
SciFund Challenge	Crowd Funding - Science Projects
University of Virginia	Crowd Funding - University Site
Challenge.gov (US)	Challenge Prizes
InnoCentive.com	Challenge Prizes
Benefunder	Crowd Funding - Science Projects
Superior Ideas	Crowd Funding - Science Projects

These links and this information is provided as a helpful resource for researchers. InfoEd Global does not investigate these organizations and groups and makes no claims as to their business practices nor their appropriateness for your endeavor. Please investigate each entity carefully before proceeding to work with them.



Please Note

While crowdfunding of research is a growing trend, there are some considerations one should take into account first, as explained in an article from the Chronicle of Higher Education (link available in SPIN on this Non-Traditional Sources screen).

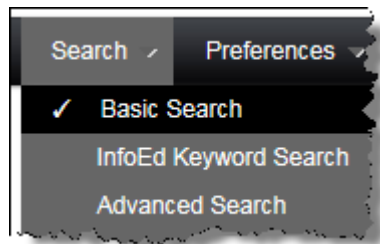
Crowdfunding sites appear and disappear on an ongoing basis. Please feel free to let us know of other sites you think should be included or broken links at spinsupport@infoedglobal.com.

6 Conducting a Basic Search

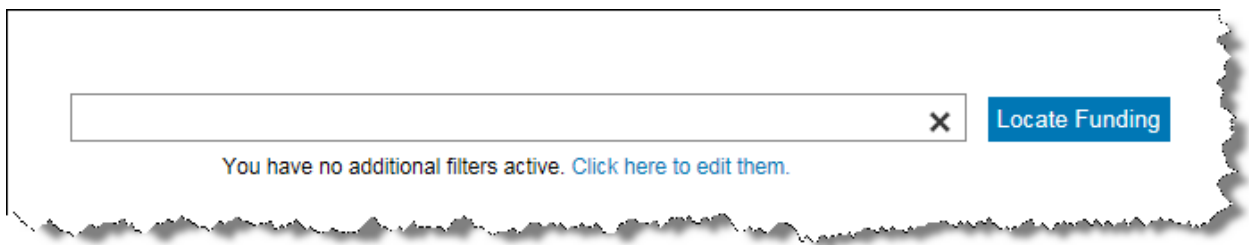
Searching for opportunities using SPIN is fast, easy, and effective.

From the SPIN Home Screen:

The Basic Search mode is the defaulted mode when the SPIN Home Screen is first accessed. This is designated by the white checkmark by the Basic Search item in the Search Menu on the SPIN Toolbar (as described in Section 4.3).



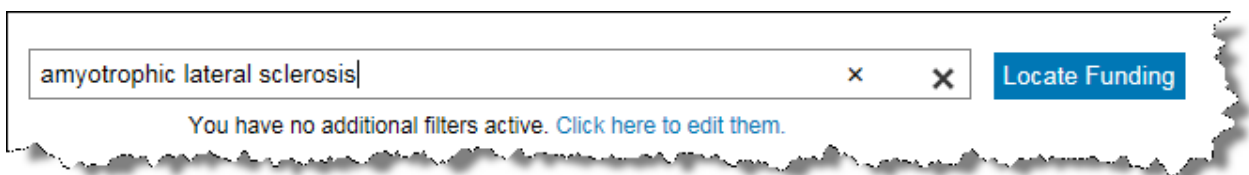
The main screen will be populated with the two primary components of the Basic Search function which are the text entry box (known as the SPIN Search field) and the Locate Funding button. As you can see in the illustration below, this search entry field initially appears blank/empty.



Before entering in your search term(s), it is very important to consider how the way the term is inputted will affect the returned results. (see 15.1.1, Basic Search Help for help on how to use input styles to control queries).

Step 1 Type your term or terms into the empty Basic Search entry field.

- ✓ In this example, we want to search for opportunities related to amyotrophic lateral sclerosis. This condition is also known as ALS or Lou Gehrig's Disease. For now, we are just going to enter amyotrophic lateral sclerosis. There is no need to add a special character or use a particular style in this case.



Step 2 Click the [Locate Funding](#) button.

A set of opportunities will be returned as shown below in Figure 35.

Figure 35 Basic Search – ALS Sample Results Returned

Results Found: 8 [Reset Filters](#) [Export](#)

Group by: drag and drop a column header to this section

<input type="checkbox"/>	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount *	Bookmark
<input type="checkbox"/>	01758	Starter Grants	Amyotrophic Lateral Sclerosis Association		12-Jan-2015	40,000.00 USD	+
<input type="checkbox"/>	21240	Multi-Year Research Grants	Amyotrophic Lateral Sclerosis Association		12-Jan-2015	240,000.00 USD	+
<input type="checkbox"/>	74532	Milton Safenowitz Post-Doctoral Fellowship Award	Amyotrophic Lateral Sclerosis Association		12-Jan-2015	100,000.00 USD	+
<input type="checkbox"/>	07555	Research Program	Fondation Thierry Latran		18-Dec-2014	<i>Not Specified</i>	+
<input type="checkbox"/>	06454	Research Grant	Muscular Dystrophy Association		15-Dec-2014	60,000.00 USD	+
<input type="checkbox"/>	57634	Conference 'Special' Grants	Muscular Dystrophy Association		<i>Continuous Submission</i>	<i>Not Specified</i>	+
<input type="checkbox"/>	84672	Clinical Research Training Grant (CRTG)	Muscular Dystrophy Association		15-Dec-2014	180,000.00 USD	+
<input type="checkbox"/>	42049	RFA-AG-15-008-- Aging and Neuromuscular Junctions (R01)	National Institute on Aging/NIH/DHHS	RFA-AG-15-008	29-Dec-2014	1,250,000.00 USD	+

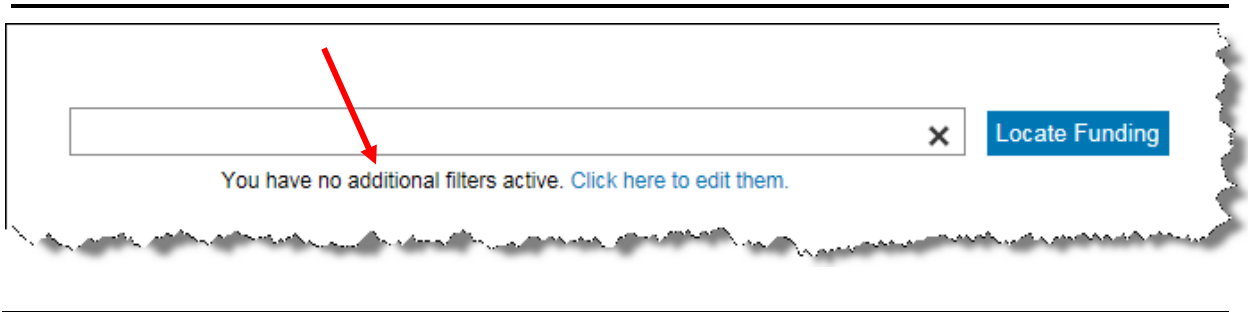
1 10 Displaying items 1 - 8 of 8

From here, the user can click on the individual opportunities found during the search.

6.1.1 SPIN Filter User Guidance

Present below the SPIN Search box for all of the search modes (Basic, Advanced and InfoEd Keyword Searches) is a user guidance link that informs the user whether or not additional filters are active for the search.

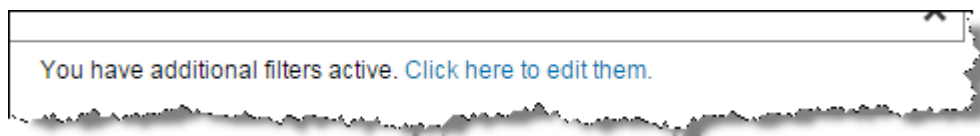
Figure 36 SPIN Filter User Guidance



If a user has not edited any of the Category Filters (Section 10.1), (Quick Searches) Search Options (Section 10.2), or Export Data Options (Section 10.3), then this SPIN Filter User Guidance link will appear as 'You have no additional filters active.' with the blue link for Click here to edit them.



If a user has edited/set any Category Filters, Search Options or Export Data Options, then this User Guidance link will appear as 'You have additional filters active.' with the blue link for Click here to edit them.



Step 1 In either instance, when the user clicks the [Click here to edit them.](#) blue link, the Current Settings Page will open (Figure 37).

Figure 37

Current Settings Page

The screenshot shows the 'Current Settings: Jess Gorman (SPIN)' page. At the top, there is a navigation bar with 'Search', 'Preferences', 'Saved Searches', 'Funding Alerts', 'Bookmarks', 'Administration', and 'Help'. The user is logged in as 'Jess Gorman (SPIN)' and has a 'Sign Out' link. A 'Back to Previous Page' button is visible in the top right. The main content area is titled 'Current Settings: Jess Gorman (SPIN)' and includes a 'Reset Filters' link. Below this, there are three main sections: 'Category Filters', 'Search Options', and 'Export Data Options'. Each section has an 'Edit' button. The 'Category Filters' section lists 'Applicant Location', 'Applicant Type', 'Project Type', and 'Project Location' with their respective selected values. The 'Search Options' section includes checkboxes for limiting search results and using synonyms, along with 'Include' and 'Exclude' options for federal and submission opportunities. The 'Export Data Options' section lists the data fields to be exported.

Category Filters [Edit](#)

Applicant Location:
Alabama, New York, United States, Northern America, Americas

Applicant Type:
Administrative Staff, Junior Faculty, Senior Faculty Member, Faculty Member, Doctoral or Terminal Degree Student, Masters Student, Undergraduate Student, Student, Academia, Minority Individual, Person with Disability, Woman, Individual Miscellaneous Attributes, Artist or Writer, Librarian or Library Professional, Medical Resident, Nurse, Physician or Medical Professional, Postdoctoral, Precollegiate Educator, Predoctoral (Non-Student), Researcher or Investigator, Professional Individual, Individual Applicant

Project Type:
Dissertation, Exchange Program, Fellowship, Fulbright Programs, Lectureship, Professorship, Sabbatical, Student Scholarship, Academic or Education Endeavor, Access to Facilities, Conference Attendance, In-Residence, Internship, Summer Position, Training and Professional Development, Travel Abroad, Travel Domestic, Professional Endeavor, Individual Funding

Project Location:
Anguilla, Antigua and Barbuda, Aruba, Bahamas, Barbados, Bonaire, Sint Eustatius and Saba, Cayman Islands, Cuba, Curaçao, Dominica, Dominican Republic, Grenada, Guadeloupe, Haiti, Jamaica, Martinique, Montserrat, Netherlands Antilles, Saint Kitts And Nevis, Saint Lucia, Saint Vincent And The Grenedines, Sint Maarten (Dutch part), Trinidad and Tobago, Turks and Caicos Islands, Virgin Islands, British, Caribbean, Belize, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Central America, Bermuda, Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland and Labrador, Northwest Territories, Nova Scotia, Nunavut, Ontario, Prince Edward Island, Quebec, Saskatchewan, Yukon Territory, Canada, Greenland, Alabama, Alaska, American Samoa, Arizona, Arkansas, California, Colorado, Connecticut, Delaware, District of Columbia, Florida, Georgia, Guam, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, North Dakota, Northern Mariana Islands, Ohio, Oklahoma, Oregon, Pennsylvania, Puerto Rico, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, United States Minor Outlying Islands, Utah, Vermont, Virgin Islands, U.S., Virginia, Washington, West Virginia, Wisconsin, Wyoming, United States, Northern America, Argentina, Bolivia, Plurinational State Of, Brazil, Chile, Colombia, Ecuador, Falkland Islands (Malvinas), French Guiana, Guyana, Paraguay, Peru, South Georgia and the South Sandwich Islands, Suriname, Uruguay, Venezuela, Bolivarian Republic of, South America, Americas

Citizenship:
U.S. Citizen

Sponsor Types:

Search Options [Edit](#)

Limit Search to Newly Created Programs (in days)
 Limit Search to Recently Updated Programs (in days)
 Use Search Text Synonyms

US Federal Opportunities: **Include**
Limited Submission Opportunities: **Include**
Include opportunities that may no longer be available: **Exclude**
Select Currency Display *: **United States Dollars**

Export Data Options [Edit](#)

Contact Name, Contact Telephone, Contact Email, Sponsor Website, Program URL, Deadline Dates (ALL), Synopsis, Project Types

On this Current Settings Page, you will find a summary of all of the options selected for the Category Filters, Search Options and Export Data Options.

If the user clicks the blue Edit button for any of these filter options (Category Filters, Search Options or Export Data Options), the respective page will open.

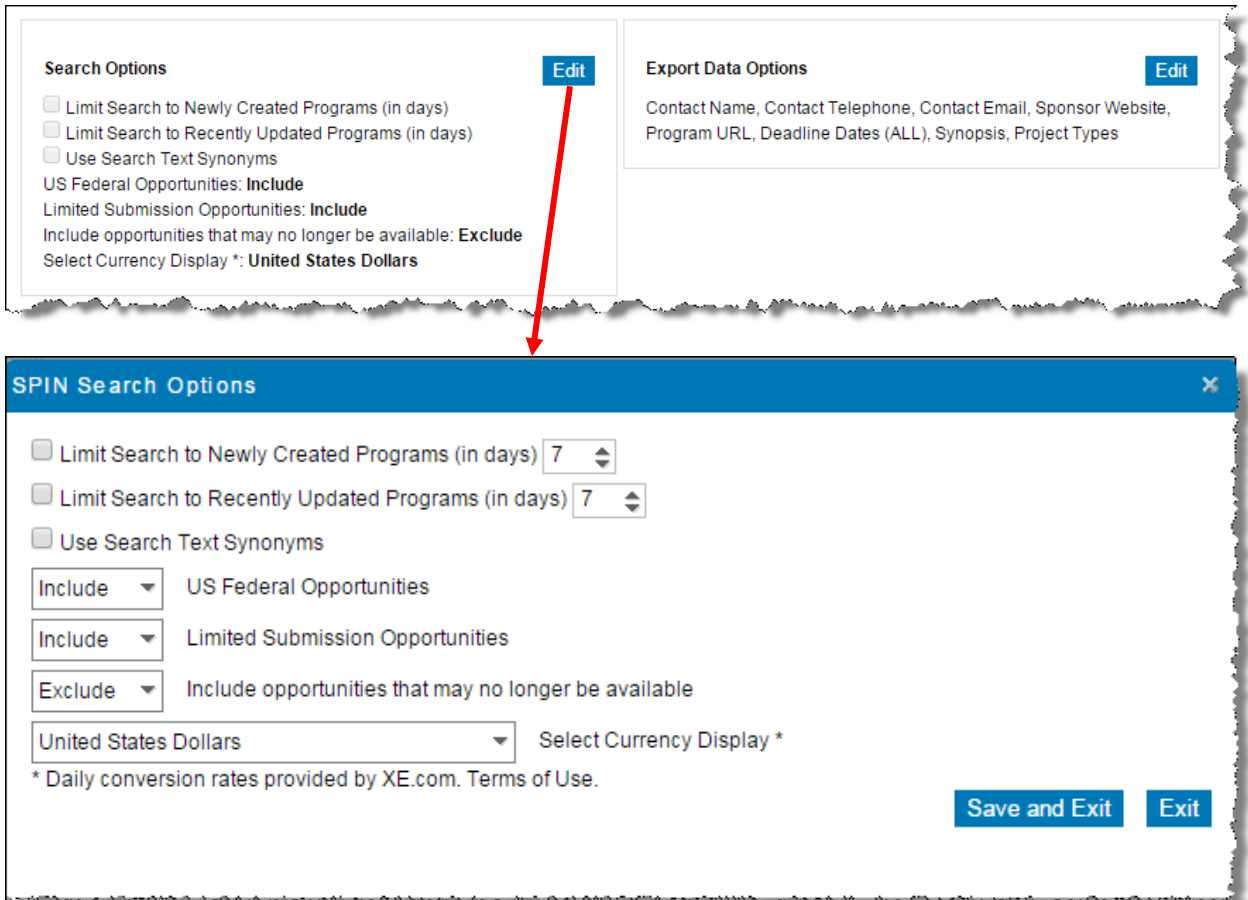
- ✓ For example, if the user clicks the Edit button for Category Filters, the SPIN Category Filters Screen (below illustration and Figure 54) will open and the user can select to edit any of the Category Tabs – Applicant Location, Applicant Type, project Type, Project Locations, Citizenship or Sponsor Type.

The screenshot shows the SPIN website header with the logo and navigation menu. The main content area is titled 'Current Settings: Jess Gorman (SPIN)'. Under the 'Category Filters' section, there are three categories: Applicant Location, Applicant Type, and Project Type, each with a list of options. A red arrow points from the 'Edit' button in the top right corner of the Category Filters section to the 'SPIN Category Filters' window shown in the next screenshot.

The 'SPIN Category Filters' window is open, showing the 'Applicant Location' tab. It contains a text box with a 'Select' button and a list of 'Applicant Locations' (Africa, Americas, Antarctic, Asia, Europe, Oceania). To the right, the 'Chosen Applicant Locations' list shows 'Americas' expanded to include 'Northern America', which is further expanded to include 'United States', which is expanded to include 'Alabama' and 'New York'. Navigation buttons (right, left, double right, double left) are between the two lists. At the bottom, there are 'Help', 'Save and Exit', and 'Exit' buttons.

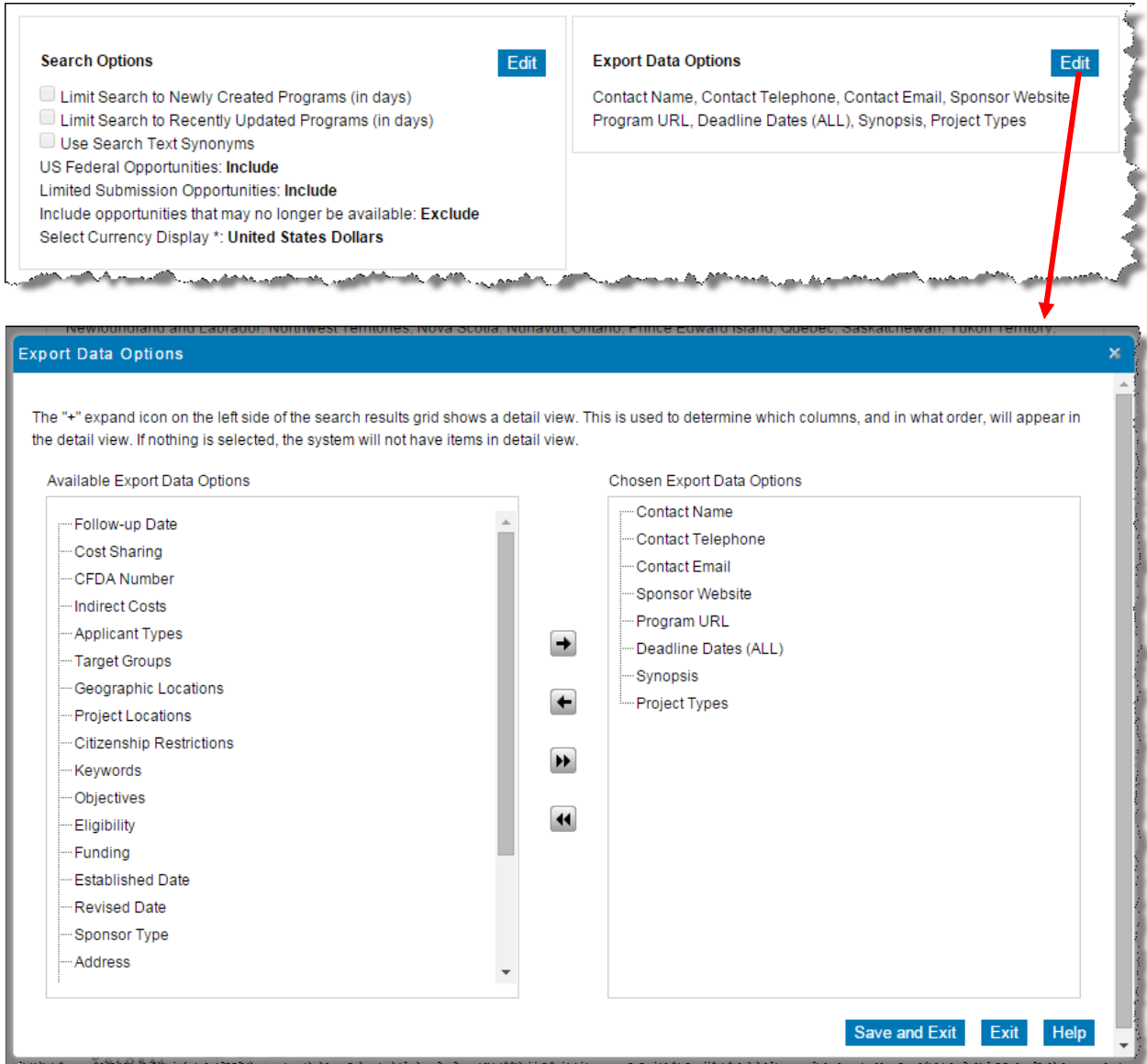
For more information on these Category Filters and their functions, please see Section 10.1.

- ✓ For example, if the user clicks the Edit button for Search Filters, the SPIN Search Options Screen (below illustration and Figure 61) will open and the user can select to edit any of the contained search options.



For more information on the SPIN Search Options, please see Section 10.2.

- ✓ For example, if the user clicks the Edit button for Export Data Options, the Export Data Options Screen (below illustration and Figure 62) will open and the user can select to edit any of the columns or column order to appear for the detail view for Opportunity records.



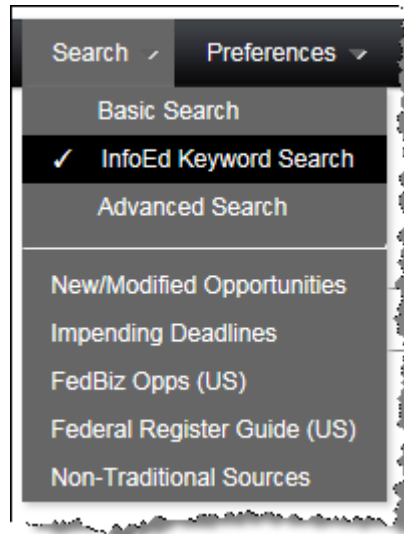
For more information on the Export Data Options, please see Section 10.3.

7 Conducting an InfoEd Keyword Search

Users can expand their ideas about how to search for opportunities that are relevant to them, by accessing terms and keywords they may not have thought of before.

To conduct an InfoEd Keyword Search:

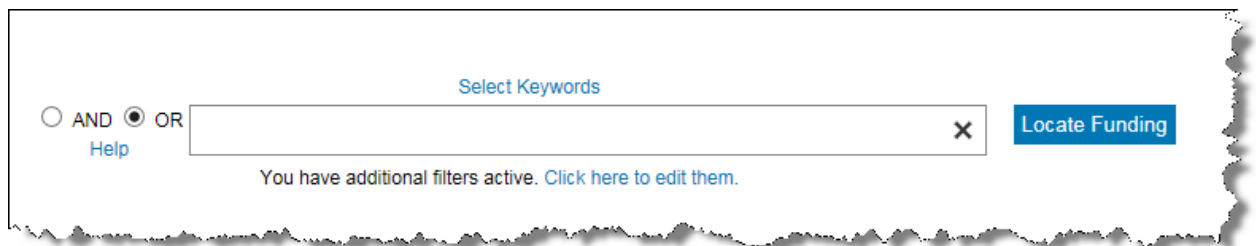
Step 1 Go to the **Search** Menu on the SPIN Toolbar.



Step 2 Click on the InfoEd Keyword Search menu item.

The main screen will be populated with the four primary components of the InfoEd Keyword Search function which are the And/Or selector, the Select Keywords link, the text entry box (known as the SPIN Search field) and the Locate Funding button.

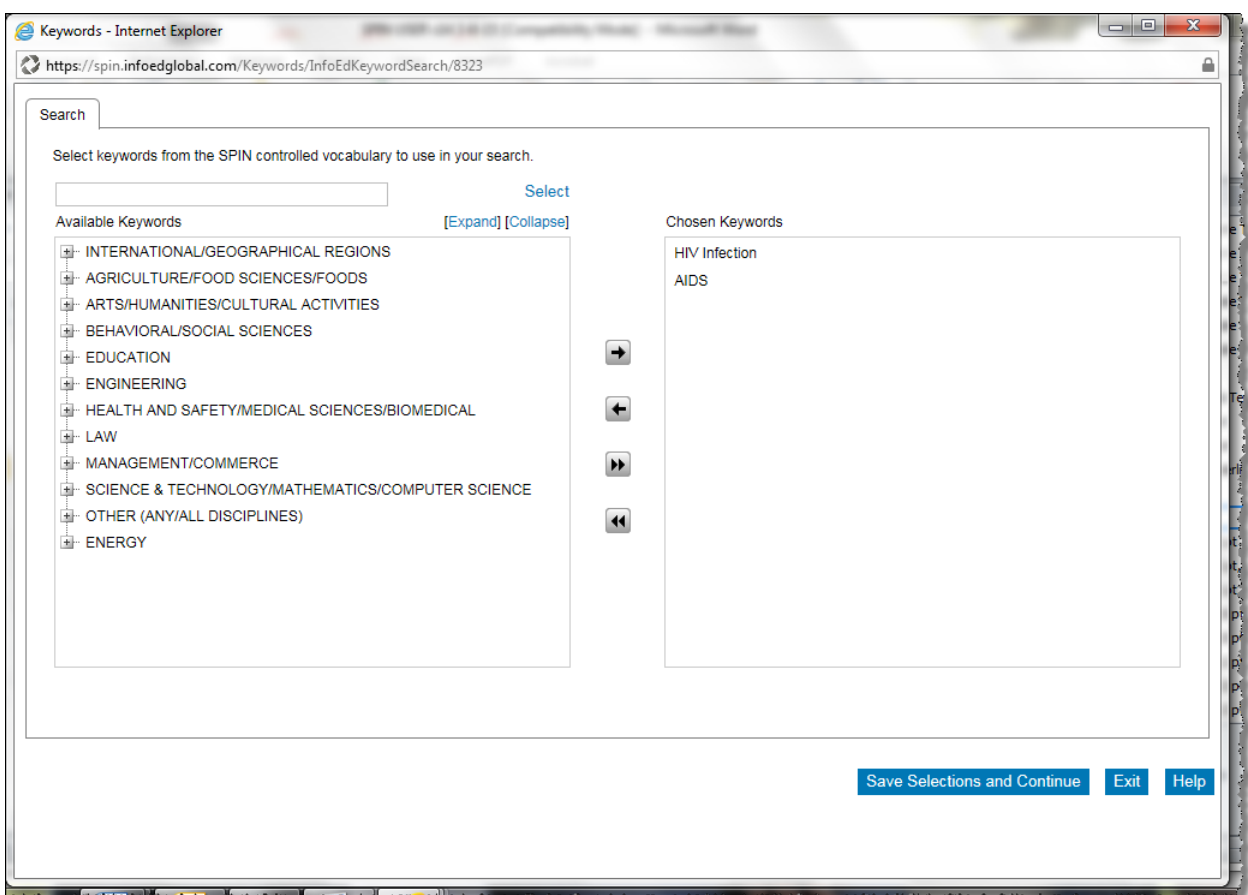
As you can see in the illustration below, this search entry field initially appears blank/empty.



In the Basic Search, the user enters their search word/term in the search entry field and then clicks the Locate Funding button to launch their search. In this InfoEd Keyword Search, the search entry field is actually not editable. The user must click on the Select Keywords link to launch a popup where they will select the keyword(s) for their search.

Step 3 Click the [Select Keywords](#) link. The InfoEd Keyword Search Popup (Figure 38) will open. On this screen, the user will select the keyword(s) for their search.

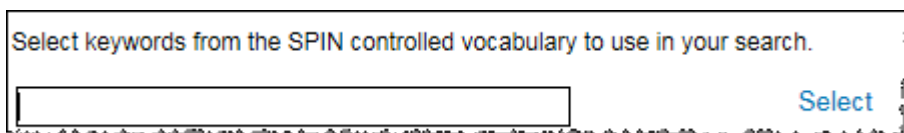
Figure 38 InfoEd Keyword Search Popup



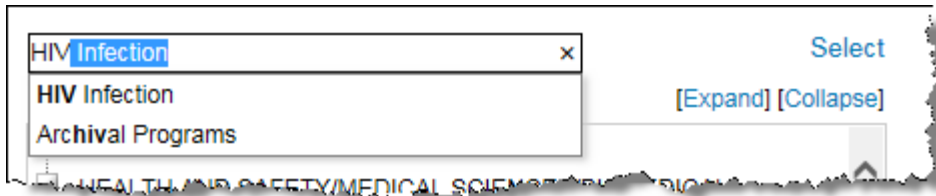
- ✓ In this example, we want to search for opportunities related to HIV Prevention OR AIDS.

Step 4 Next, the user will designate their keyword(s) to perform their search. Now, there are two distinct ways to select your keyword(s).

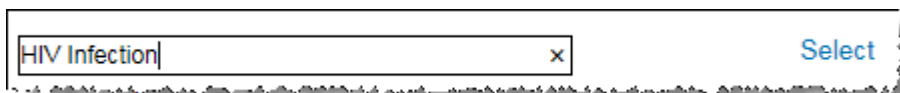
1. The first method involves using the text entry box and blue Select link at the top, left of this popup to search for your keyword(s) by entering in your word/term.





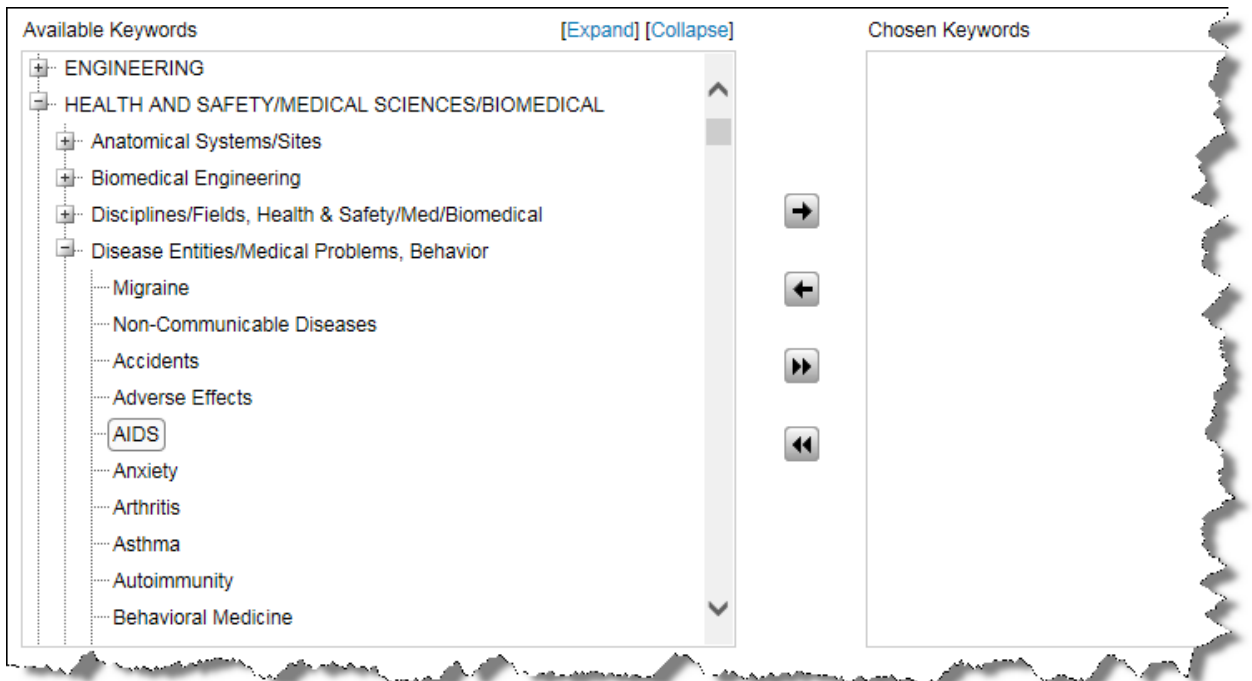
The Progressive Text Feature also applies here so as you begin typing, if SPIN recognizes the letters, relevant values will appear in the entry field as well as in a list beneath for the user to choose from and you can click on your selection to auto-fill the field and add the selected keyword to the Chosen Keywords list.



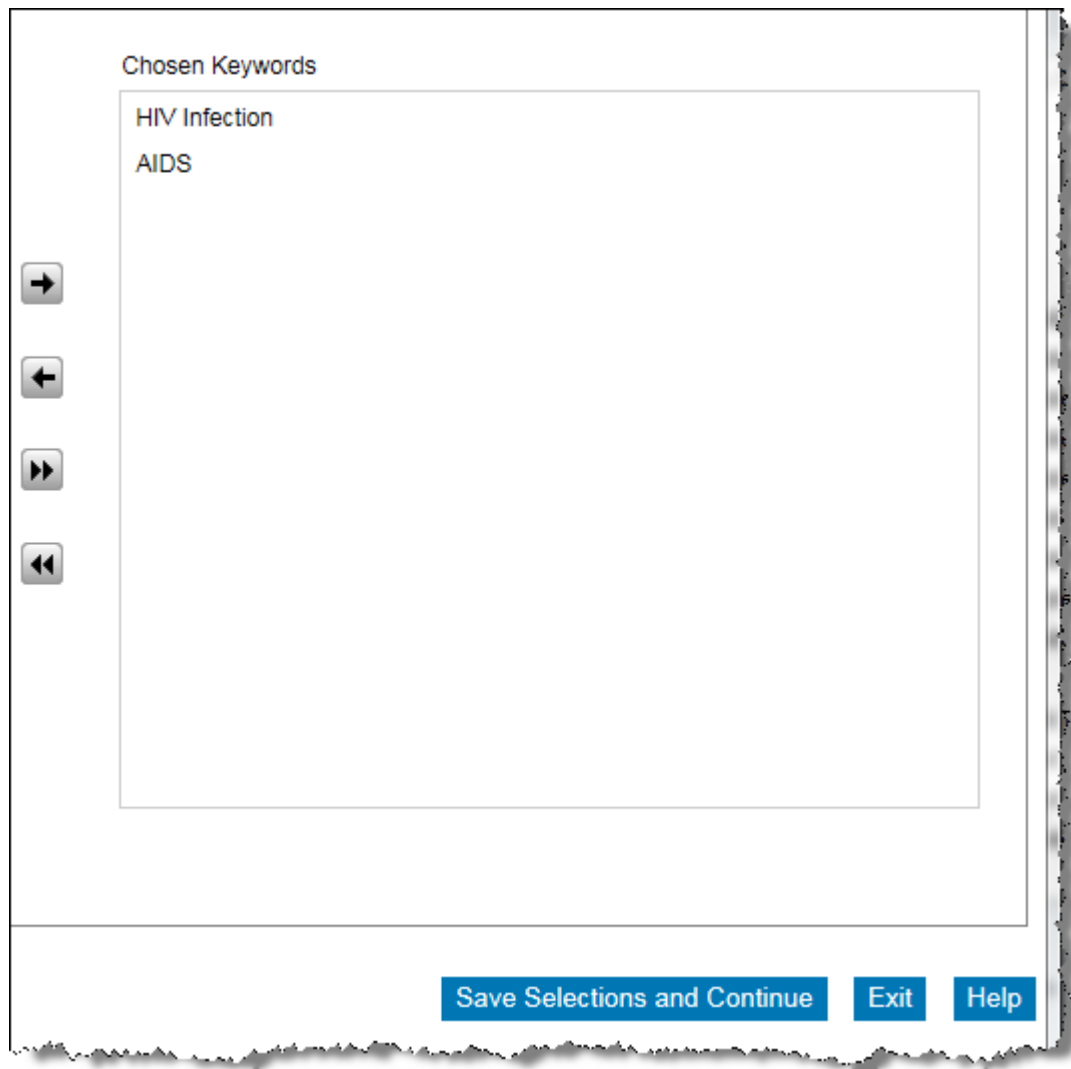
If the user chooses to not utilize the progressive text feature, they can type in their desired text and click **Select** to move their keyword to the Chosen Keyword List.



2. The second method is to utilize the Available Keywords hierarchical keyword list to drill down and find your desired keyword(s) and then using the  or  buttons to move them to the Chosen Keywords list.

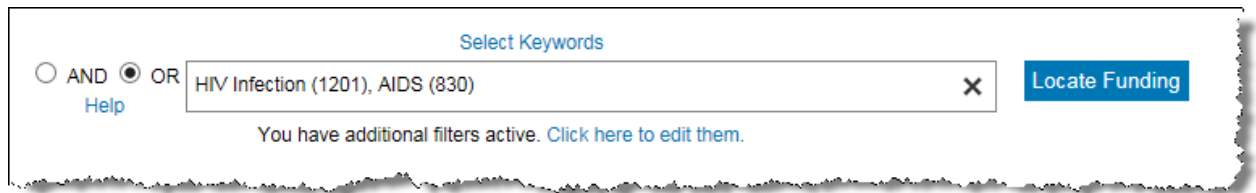


Step 5 After selecting the terms you want and they are in your Chosen Keywords List, click **Save Selections and Continue**, which will close the popup and display the selected terms in the SPIN search box.



If the user would like to return to the SPIN Home Page with no keyword(s) selected, they would click on the **Exit** button.

Now that the user has been returned to the SPIN Home Page/InfoEd Keyword Search Mechanism, they will notice that their selected keywords have been pre-populated into the Search box (see below).



Select Keywords

AND OR

[Help](#)

You have additional filters active. [Click here to edit them.](#)

Step 6 To proceed, the user has to designate whether they want to search in 'AND' or 'OR' mode. In either mode, the selected terms are being compared with keyword terms associated with each funding opportunity rather than the full text of the opportunity.

The default mode for this AND/OR selector is 'OR' which means that when your search is loaded, the results retrieved will contain opportunities relevant to the keyword 'HIV Infection' or keyword 'AIDS'. This search mode is more inclusive and typically would retrieve a larger number of opportunities pertaining to HIV Infection and/or AIDS.

If 'AND' is selected, the returned results would contain opportunities that pertain to both keywords simultaneously, so the projects must relate to the keyword 'HIV Infection' AND 'AIDS'. This search mode is more exclusive and would generally retrieve a fewer number of opportunities pertaining to HIV Infection and AIDS.

Step 7 Click Locate Funding to carry out the search.

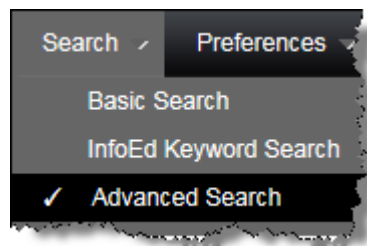
8 Conducting an Advanced Search

Using the Advanced Search Mode allows users to set additional limits on their searches, and often results in a lower number of returned opportunities, but a higher level of relevancy with regard to a user's interests.

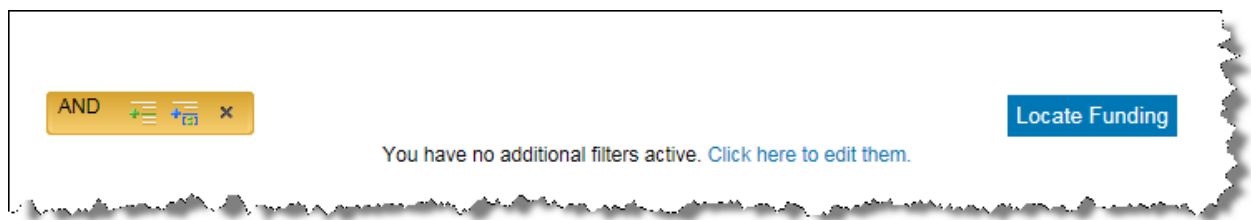
From the SPIN Home Screen:

The Advanced Search mode is the third option on the SPIN Toolbar's Search Menu.

Step 1 To designate the Advanced Search mode, the user will click on the Advanced Search menu item in the Search Menu.



The main screen will be repopulated with the two primary components of the Advanced Search function which are the Advanced Search Tool (see Section 8.1) and the Locate Funding button.







8.1 The Advanced Search Tool

The Advanced Search Tool, shown below as Figure 39, is the starting point for users who want to use the Advanced Search Mode.

Figure 39 **Advanced Search Tool**



The tool contains the components listed below:

 AND/OR Function	Allows the user to designate an AND or OR modality for the selected expression. See Section 8.1.1 for more information on this function.
 Add Expression Function	Allows the user to add a new search expression. See Section 8.1.2 for more information on this function.
 Add Group Function	Allows the user to add a new expression group. See Section 8.2.2 for more information on this function.
 Remove Item Function	Allows the user to remove a search item. See Section 8.2.3 for more information on this function.

These functions are described under the four subsequent corresponding section headers. Each subsection contains examples of how to use each feature. At the end of this section, an additional example is presented which encompasses all the features.

8.1.1 AND/OR Function

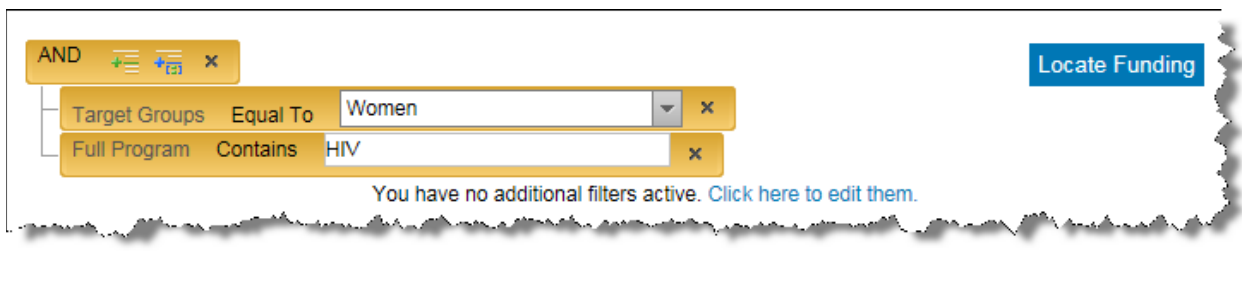
The AND/OR Function within the Advanced Search Tool allows users to make a fundamental choice about how they want their advanced search to run.

Making a choice between “AND” or “OR” requires users to first think about what criteria they will be entering into the rest of the Advanced Search Tool. See the subsequent sections for more information about available criteria.

If your search criteria will be exclusive to more than one criteria:

- Do nothing. The system is set up to default to “AND.”
- ✓ In this example, we know in the next fields we will enter search criteria to result in returned opportunities related to AIDS and women. Thus, we need to leave the AND/OR Function set to “AND.”

Figure 40 **AND/OR Function - Example**



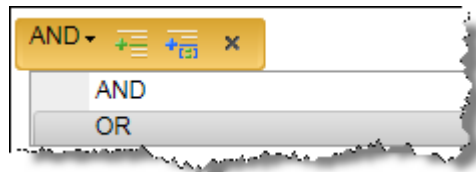
If your search criteria will be inclusive of more criteria:

Step 1 Hover your cursor next to **AND**. A black, downward-facing arrow will appear: **AND ▾**.

Step 2 Click on the arrow and a drop-down list will appear giving the user the opportunity to select either “AND” or “OR”.



Step 3 Mouse down to the option you'd like to select, stopping when the desired item is highlighted in gray as shown below. In this example, we'd like to select “OR” so we have moused down to that item and it has become shaded.



Step 4 Click the highlighted item. The Advanced Search Tool is now set to “OR,” as shown below.



- ✓ In this example, we know that in the next fields we will enter criteria to search for opportunities involving HIV or AIDS.



In the above example, note the difference between searching for HIV “OR” AIDS vs. HIV “AND” AIDS. If we choose “AND” then SPIN will return only opportunities that contain both terms. By selecting “OR” in this case, we can be sure that SPIN will return any opportunity that contains either HIV or AIDS.

8.1.2 Add Expression Function

The Add Expression Function is utilized by SPIN users to select one or more levels of criteria, and to enter one or more levels of search terms.

Figure 41 Add Expression Function




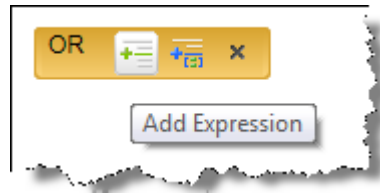
When selected, the Add Expression function is highlighted in white as seen in the above illustration.

This function has the following components:

	<p>A pull-down menu of opportunity criteria;</p>
	<p>A pull-down menu with a contains vs. does not contain option;</p>
	<p>A blank search field for entering terms; and,</p>
	<p>A remove item function.</p>

To begin using the Add Expression Function:

Step 1 Hover your cursor over the Add Expression Function . The Add Expression Function will be shaded in white and the Add Expression textual cue will appear.

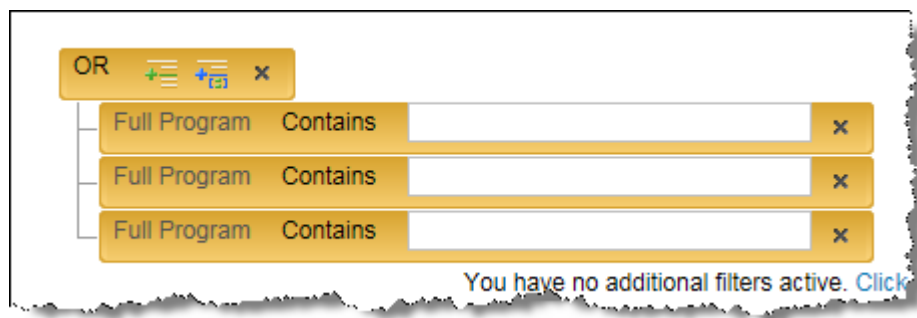


Step 2 Click on the Add Expression Function. A first-level criteria and search term bar will appear, as shown below.



Step 3 Users can click on the Add Expression Function as many times as necessary, depending on the goal of their advanced search.

Each time the function is clicked, an additional criteria and search term bar will appear, allowing the user to add more levels of criteria and search terms.



8.1.3 Choosing Program Criteria

The first step for users who are accessing the **Add Expression Function** is to choose a criteria to search for opportunities, otherwise known as programs.

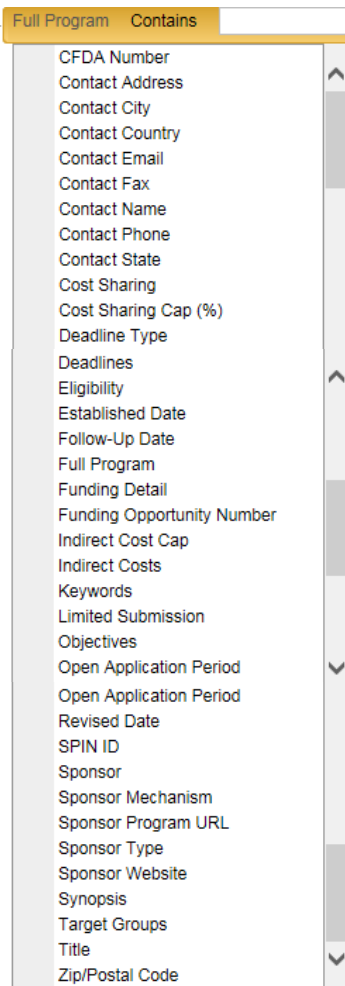
In the Advanced Search Mode, SPIN defaults to searching the entire content of each opportunity for whatever term the user enters into the search field. This default is depicted by the “Full Program” listing as shown below.

Full Program

Users can narrow down their searches by selecting one criteria from an extensive list, which includes 36 criteria, as shown below.

Figure 42

Program Criteria List



Each of these 36 criteria are elements of opportunities that SPIN can search for specifically.

If a user does not use the pull-down menu to select a criteria, SPIN defaults to the Full Program Criteria. This means the *entire content of the opportunity will be searched*.

Most of the criteria are self-explanatory. The following table provides additional information about criteria that are more complex and/or have additional associated functions, as necessary.

CFDA Number	This refers to the Catalog of Federal Domestic Assistance* Number. When the CFDA Criteria is selected, a pull-down menu appears next to “Equal To” with one additional value: “Not Equal To.” Users may select a comparative limitation, and then type in their desired number. A pull-down menu also appears beneath to the blank search field which shows all available CFDA Numbers.
Cost Sharing	This refers to whether or not cost sharing is required by the Sponsor. When the Cost Sharing Criteria is selected, a pull-down menu appears next to “Equal To” with one additional value: “Not Equal To.” Users may select a comparative limitation. A pull-down menu also appears to the right of the empty search field. Users may then select “Yes” or “No” to limit search results. Selecting “Yes” means that all returned results will contain only opportunities that require cost sharing. Selecting “No” means that only opportunities that do not require cost sharing will be returned.
Cost Sharing Cap (%)	This refers to the percentage of the cost sharing cap that is associated with the opportunity. When the Cost Sharing Cap Criteria is selected, a pull-down menu appears next to “Equal To” with five additional values (less than, etc.). Users may then select a comparative limitation, and enter a percentage value directly into the blank search field.
Deadline Type	This refers to the program’s deadline type. a pull-down menu appears next to “Equal To” with one additional value: “Not Equal To.” Users may select a comparative limitation. There are three selections available. Postmark refers to the date that a submission <i>must be postmarked</i> by in order to be accepted by the Sponsor. Receipt refers to the <i>date that the Sponsor must receive</i> a submission. Target refers to the <i>date a Sponsor would prefer to receive</i> the application.
Deadlines	This refers to the deadline to apply for the opportunity. When the Deadlines Criteria is selected, a pull-down menu appears next to “Equal To” with five additional values (greater than, less than, etc.). Users may then select a comparative limitation. A calendar icon is located next to the search field, which then allows users to choose a specific deadline date.
Eligibility	This refers to eligibility limitations associated with opportunities, such as citizenship status or applicant type (i.e., faculty). Users can utilize the “Contains” and “Does Not Contain” Options to include or exclude opportunities with particular types of eligibility. For example, choosing the “Does Not Contain” option, and typing “citizen” into the search field would yield opportunities that do not require applicants to be US citizens.

Established Date	This refers to the date that the opportunity was established. When the Established Date Criteria is selected, a pull-down menu appears next to “Equal To” with five additional values (greater than, less than, etc.). Users may then select a comparative limitation. A calendar icon is located next to the search field, which then allows users to choose a specific established date.
Follow-Up Date	This refers to the date when InfoEd Global will review the opportunity and, if necessary, contact the Sponsor for updated information. When the Follow-Up Date Criteria is selected, a pull-down menu appears next to “Equal To” with five additional values (greater than, less than, etc.). Users may then select a comparative limitation. A calendar icon is located next to the search field, which then allows users to choose a specific follow-up date.
Funding Detail	This refers to details related to how the Sponsor funds opportunities, for example, the duration or amount of funding. Users can utilize the “Contains” and “Does Not Contain” Options to include or exclude opportunities that contain those terms within the Funding Detail field provided in the Opportunity Information Links (see Section 9.1.7).
Indirect Cost Cap	When the Indirect Cost Cap Criteria is selected, a pull-down menu appears next to “Equal To” with five additional values (greater than, less than, etc.). Users may then select a comparative limitation, and enter an indirect cost cap value directly into the blank search field. Returned opportunities would include only those valued within the amounts set by the user.
Indirect Costs	When the Indirect Costs Criteria is selected, a pull-down menu appears next to “Equal To” with one additional value: “Not Equal To.” Users may then select a comparative limitation, and then choose “Yes,” “No,” or “Undetermined” from the pull-down menu next to the blank search field.
Keywords	If users choose the Keywords Criteria, a key icon will appear next to the blank search field. Clicking this icon opens the Keyword Search Option Menu. See Section 7 for more information.

Limited Submission	This refers to whether or not a Sponsor has imposed a limit on the quantity of submissions from each institution. When the Limited Submission Criteria is selected, a pull-down menu appears next to “Equal To” with one additional value: “Not Equal To.” Users may then select a comparative limitation. An additional pull-down menu appears to the right of the empty search field. Users may then select “Yes” or “No” to select whether or not their returned opportunities’ Sponsors do or do not set submission limitations.
Objectives	This refers to the content within the opportunity’s stated objective. When the Objectives Criteria is selected, users can utilize the “Contains” and “Does Not Contain” Options to include or exclude opportunities with particular objectives-related content.
Open Application Period	This refers to whether or not the Sponsor has an open application period. When the Open Application Period Criteria is selected, a pull-down menu appears next to “Equal To” with one additional value: “Not Equal To.” Users may then select a comparative limitation. An additional pull-down menu appears to the right of the empty search field. Users may then select “Yes” or “No” to limit search results. Selecting “Yes” means that all returned results will contain only opportunities that have an open application period. Selecting “No” will limit returns to those opportunities with specific deadlines.
Revised Date	This refers to the date the opportunity was revised by the Sponsor. When the Revised Date Criteria is selected, a pull-down menu appears next to “Equal To” with five additional values (greater than, less than, etc.). Users may then select a comparative limitation. A calendar icon is located next to the search field, which then allows users to choose a specific revised date.
SPIN ID	This refers to the InfoEd Global-generated SPIN ID number, created to track the opportunity. When the SPIN ID Criteria is selected, a pull-down menu appears next to “Contains” with five additional limitations (starts with, ends with, etc.). Users may then enter additional limiting criteria into the empty search field.

Sponsor	This refers to the entity that is funding the opportunity. When the Sponsor Criteria is selected, a pull-down menu appears next to “Equal To” with one additional value: “Not Equal To.” Users may then select a comparative limitation, and then type in their desired Sponsor. A pull-down menu also appears next to the blank search field which shows all the Sponsors in the SPIN database. Users can select from this list as they begin typing the first few letters of the Sponsor’s name.
Sponsor Mechanism	This refers to different types of awards offered by NIH and NSF. For example, the NIH’s R01 award category. When the Sponsor Mechanism Criteria is selected, a pull-down menu appears next to “Equal To” with one additional value: “Not Equal To.” Users may then select a comparative limitation, and then type in their desired mechanism. As users begin to type into the blank field, a pull-down menu appears beneath the search field which shows all the available Sponsor Mechanisms from the SPIN Database.
Sponsor Program URL	This refers to the opportunity’s URL address, when applicable. When the Sponsor Program URL Criteria is selected, a pull-down menu appears next to “Contains” with five additional limitations (starts with, ends with, etc.). Users may select an option, then enter additional limiting criteria into the empty search field.
Sponsor Type	This refers to the type of agency or other entity that is funding the opportunity (for example, Federal or university, etc.). When the Sponsor Type Criteria is selected, a pull-down menu appears next to “Equal To” with one additional value: “Not Equal To.” Users may then select a comparative limitation, and then access an additional pull-down menu to the right of the empty search field, which contains all available Sponsor Types. See also the instructions provided below this table, which are written for a Sponsor Type search.
Sponsor Website	This refers to the opportunity’s Sponsor’s home page URL address, when applicable. When the Sponsor Website Criteria is selected, a pull-down menu appears next to “Contains” with five additional limitations (starts with, ends with, etc.). Users may select an option, then type additional limiting criteria into the empty search field.
Synopsis	This refers to the content within the opportunity’s synopsis. When the Synopsis Criteria is selected, users can utilize the “Contains” and “Does Not Contain” Options to include or exclude opportunities with particular synopsis content. See Section 9.1.7—Opportunity Information Links.

Target Group	This refers to a group of people for which the opportunity was created. For example, veterans. When the Target Group Criteria is selected, users can utilize the “Contains” and “Does Not Contain” Options to include or exclude opportunities for particular groups of people. A pull-down menu appears next to the empty search field to allow users to choose from target groups. Users cannot type in their own target groups; they must select a SPIN-recognized group from the menu.
Title	This refers to the title of the opportunity. When the Title Criteria is selected, users can utilize the “Contains” and “Does Not Contain” Options to include or exclude opportunities with particular titles.
Zip/Postal Code	This is the zip code of the program. When the Zip/Postal Code Criteria is selected, a pull-down menu appears next to “Contains” with five additional limitations (starts with, ends with, etc.). Users may select an option, then type additional a partial or full zip code into the empty search field.

*The Catalog of Federal Domestic Assistance (CFDA) provides a full listing of all Federal programs available to state and local governments (including the District of Columbia); federally-recognized Indian tribal governments; territories (and possessions) of the United States; domestic public, quasi-public, and private profit and nonprofit organizations and institutions; specialized groups; and, individuals.

If you have additional questions about how any of the criteria affect SPIN searches please contact the SPINPlus Administrator within your institution.

8.2 Navigating the Advanced Search Mechanism

In this example, we are going to begin our Advanced Search by limiting the returned opportunities to United States Federally-granted opportunities. This means we are looking for a particular Sponsor Type.

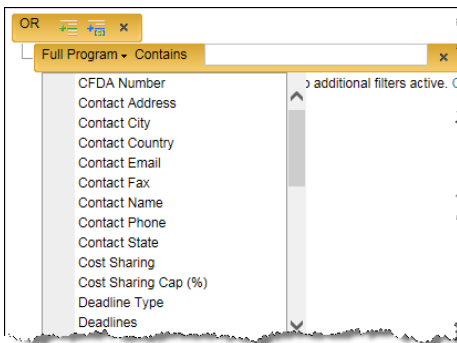


Within the 36 available criteria, there are two Federal designations. Choose "US Federal" to search for opportunities Sponsored by the United States government. Choose "Federal" for opportunities Sponsored by the governments of other nations.

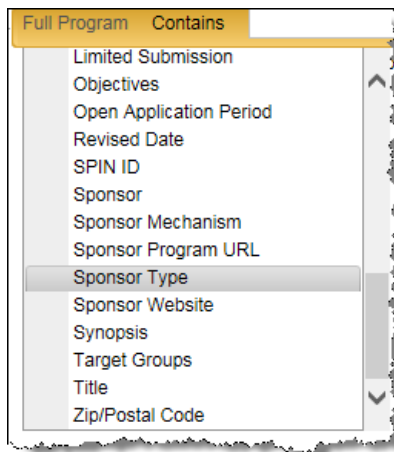
Step 1 Hover your cursor to the right of **Full Program**. A black, downward-facing arrow appears, as shown below.

A yellow rectangular button with the text "Full Program" and a small downward-pointing arrow on the right side.

A pull-down menu with the 36 criteria (full list shown above) will appear.



Step 2 Use the scroll-bar on the right-side of the list to locate the criteria you want, then hover your cursor over it, until it becomes highlighted gray.



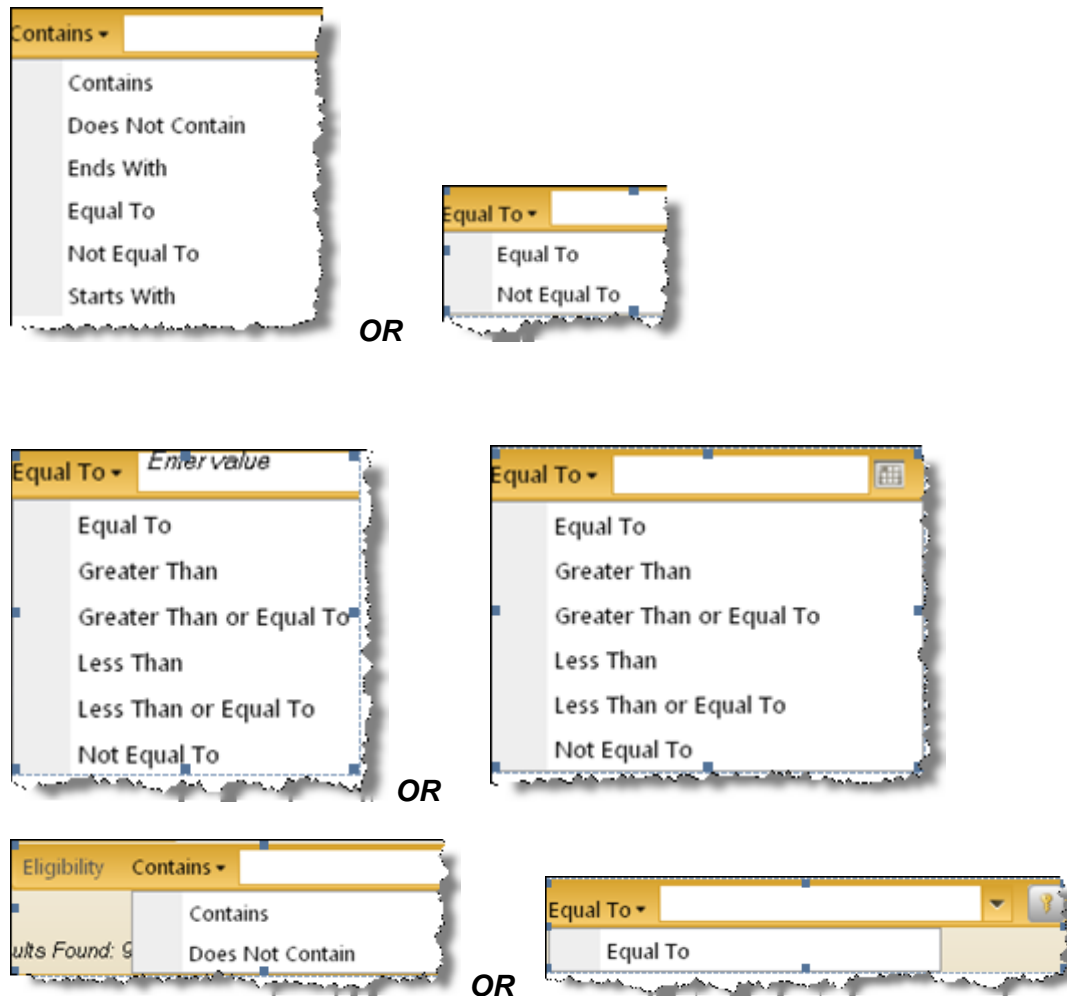
Step 3 Click on your selection which for this example is “Sponsor Type”.

When “Sponsor Type” is selected, **Full Program** ▾ **Contains** changes to **Sponsor Type** **Equal To**.

Depending on which of the 36 criteria you choose, the area to the right of criteria will remain as “Contains”, or change to “Equal To”.

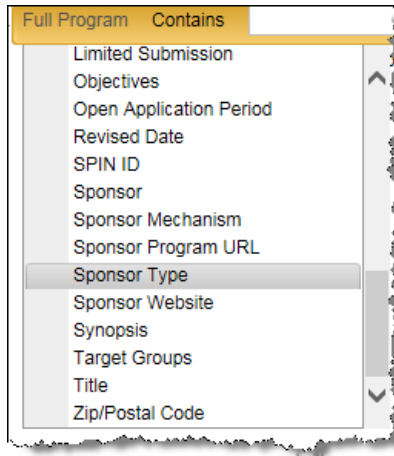
Step 4 Hover your cursor next to **Contains** or **Equal To**.

A black, downward-facing arrow will appear, with a list of additional search limitations, as shown below. *These will vary among the 36 criteria, as depicted in the six images below.*



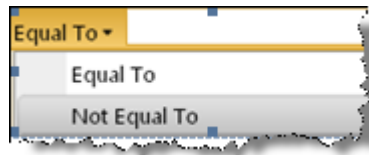
These additional choices allow you to further clarify your search limitations. The table above explains those criteria with attached functions that are slightly more complex than others. The remaining criteria are relatively self-explanatory. If you have additional questions about how the 36 criteria can be used, please contact your SPINPlus Administrator.

- Remember, in this example, we are looking for United States Federally-granted opportunities. We have already done the following:



Sponsor Type Equal To

SPIN defaults to “Equal To” when Sponsor Type is selected, which suits the necessary limitations of our example search. If we wanted to search for every type of funded opportunity *with the exception of US Federal*, we would select “Not Equal To,” as shown below.

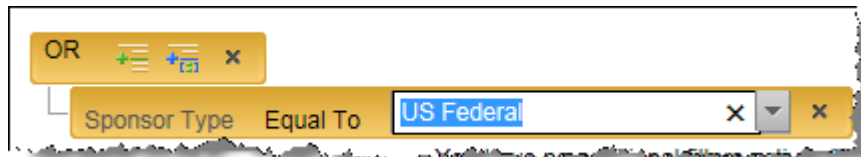


Step 5 Click on the arrow located to the right of the blank search field, as shown below.



A pull-down menu appears, as shown below.

Step 6 Use the scroll-bar to find the Sponsor Type you are interested in (i.e. US Federal) and click on your selection. It will now appear in the search field, as shown below.



8.2.1 Progressive Text Feature

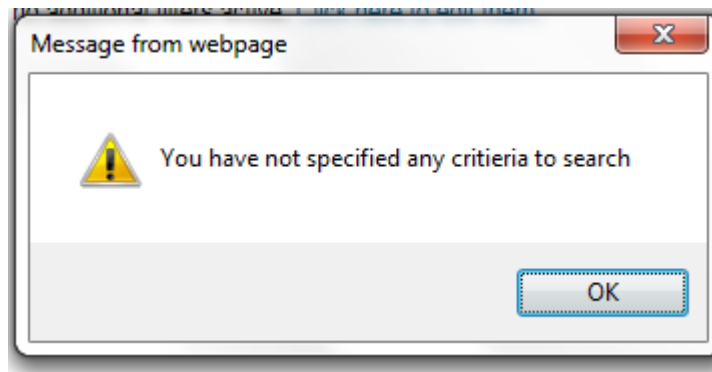
Alternatively, you can type your selection into the empty field. As you begin typing, if SPIN recognizes the Sponsor Type, it will automatically appear beneath the blank field, and you can click on your selection to auto-fill the field.



This is called a **Progressive Text Feature**. It is attached to the following 11 of the 36 available criteria: Contact Country; Contact Name; Cost Sharing; Deadline Type; Indirect Cost; Limited Submission; Open Application Period; Sponsor Mechanism; Sponsor; Sponsor Type; and, Target. This feature is also attached to the Basic Search Mode and to the process for saving search parameters.

- ❖ See Section 6.1.1—Progressive Text Feature
- ❖ See Section 5.1.5—Saving Search Parameters


You can only type recognized Sponsor types into the field. If you type a word that is not a recognized Sponsor Type, no selection will appear beneath the blank field. In such a case, the popup message shown below would appear when the user enters their invalid entry and hits the Enter button to initiate the entry.

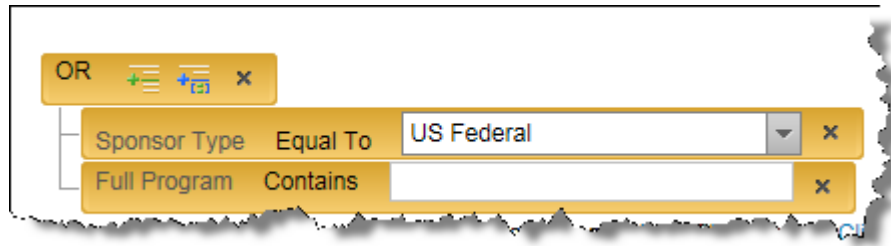


Returning to our example, if we stop entering limitations to our search now, depending on the user's Search Options selections, SPIN would return *every single available US Federal opportunity*.

Therefore, we must add additional limitations...

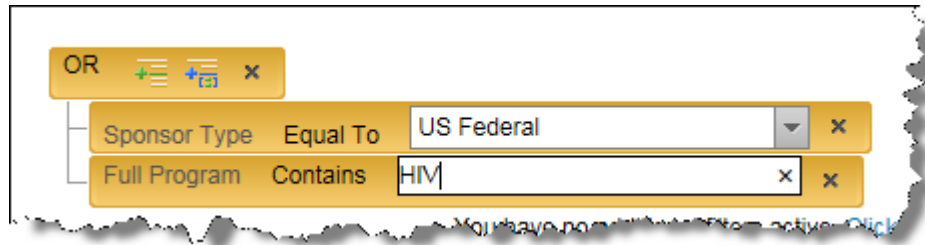
- ❖ See Section 10.2, SPIN Preference Menu Search Options for more information on how user search option selections can affect returned opportunities.

Step 7 Click on  again. A new blank field will appear, as shown below.



- ✓ In this example, in addition to looking for only United States Federally-Sponsored opportunities, we are going to look for opportunities related to HIV.

Step 8 Type HIV into the second Add Expression Function field.



Step 9 Click the  Button.

Our Advanced Search is now telling SPIN that all returned opportunities must have:

- A US Federal Sponsor, **OR**;
- Must contain the word HIV somewhere within the text of the Full Program.


At the time, SPIN returned 160 opportunities for this example search. We want to make sure we have covered everything related to HIV in our search.

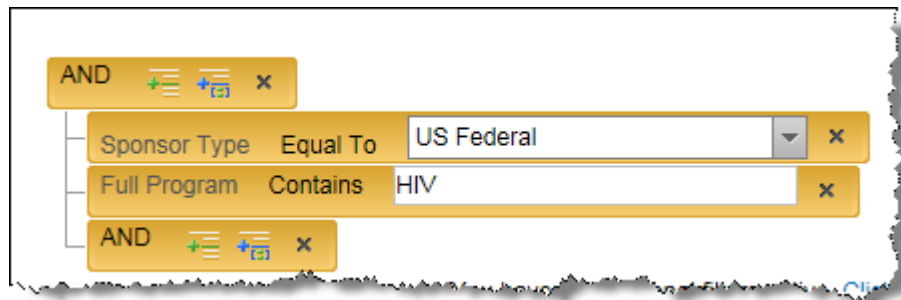
Since HIV is a lentivirus that can lead to the development of AIDS, let's use the **Add Group Function** to add the terms lentivirus and AIDS to our search to see how the results change.

8.2.2 Add Group Function

The Add Group Function allows SPIN users to add additional search terms, without changing the first tier, overriding criteria. In other words, users are adding new groups of criteria when they use this feature.

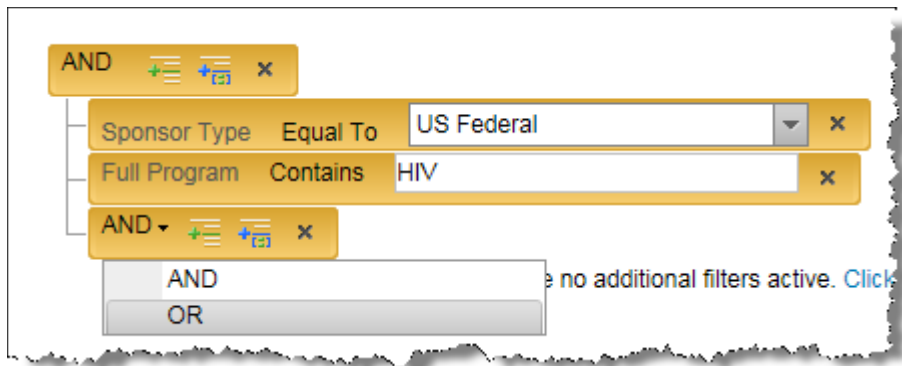
- ✓ In this example, we want a US Federal Sponsor Type. We also want our search geared towards HIV, however we want to expand our search to closely-related opportunities, without changing it drastically. We can do so by using changing AND/OR Function *between search terms* by using the Add Group Function.

Step 1 Click on . This is the Add Group Function. A new AND/OR Function will appear beneath the existing search criteria, as shown below.

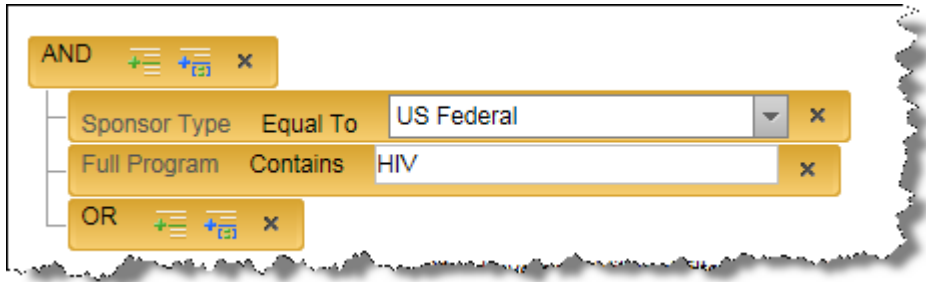



Step 2 Hover your cursor next to . A black, downward-facing arrow will appear: .

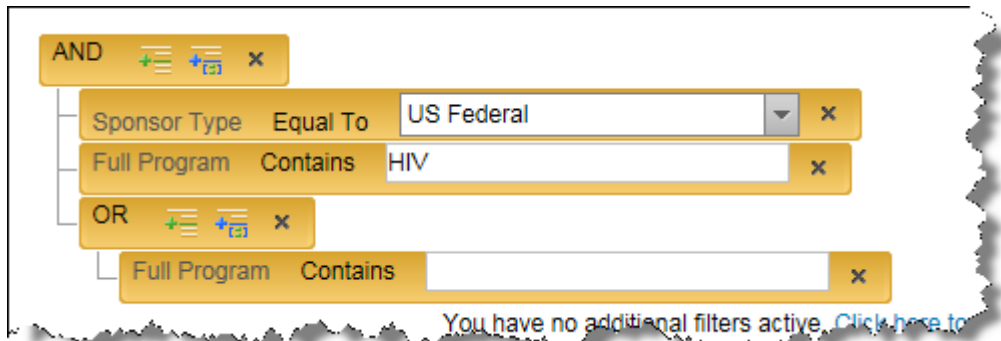
Step 3 Click on the arrow, mouse over until “OR” becomes highlighted in gray, as shown below.



Step 4 Click again. The second tier of the Advanced Search Tool is now set to “OR,” as shown below.



Step 5 Click  to add another expression. An additional field appears, as shown below.



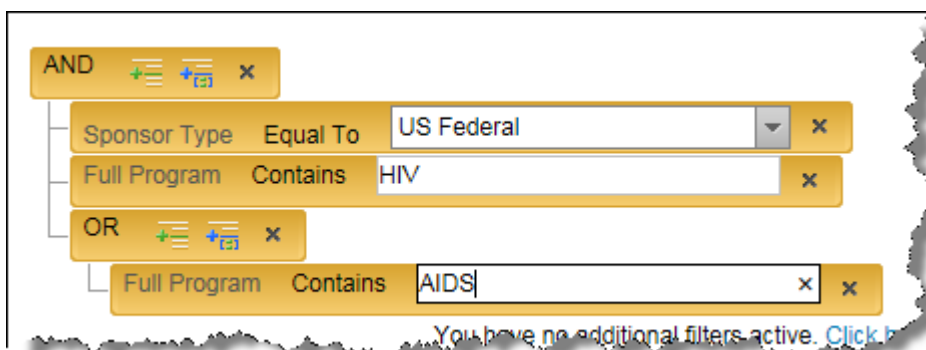
In the lowest search field shown above, we must now add a minimum of two expressions in order to utilize the OR Function.



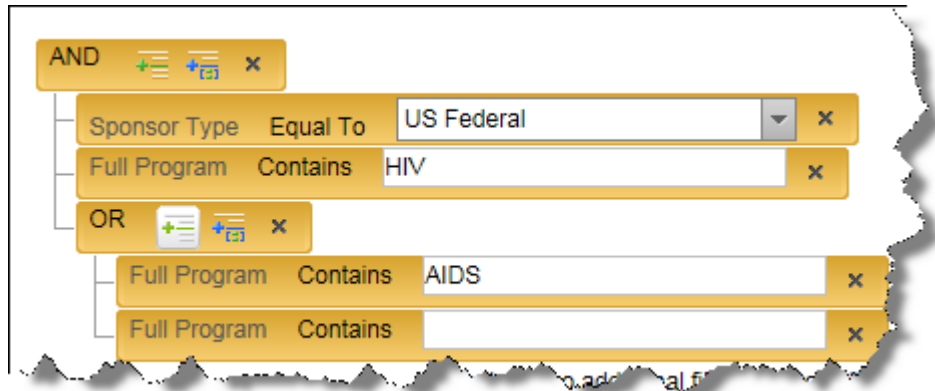
Key Concept



The tier lines to the left of the various search fields can help users understand how their search terms are grouped logically. In the example directly above, the lines show that the addition of the OR Function means that the OR applies only to the lowermost field.

Step 6 Click into the blank field and type AIDS.





Step 7 Click on  again. Another new blank field will appear, as shown below.



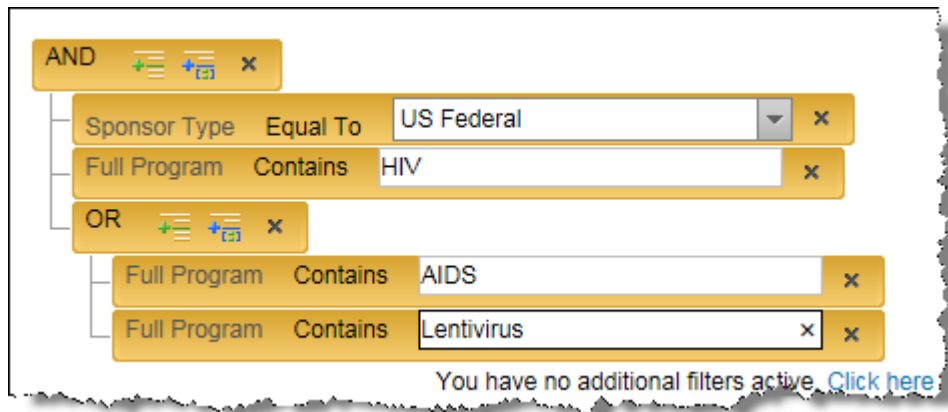
AND   x



- Sponsor Type Equal To US Federal x
- Full Program Contains HIV x

OR   x



- Full Program Contains AIDS x
- Full Program Contains x

Step 8 Type Lentivirus into the lowermost field and our full set of parameters now looks like this:



AND   x

- Sponsor Type Equal To US Federal x
- Full Program Contains HIV x

OR   x

- Full Program Contains AIDS x
- Full Program Contains Lentivirus x x

You have no additional filters active. [Click here](#)

Step 9 Click the  Button.

Our Advanced Search is now telling SPIN that all returned opportunities *must have*:

- A US Federal Sponsor,
- **AND**;
- Must contain the word HIV somewhere within the text of the Full Program,
- **OR**
- The returned opportunities must contain *either* the term AIDS or Lentivirus within the Full Program text.



It is important for SPIN users to recognize that the precision level of their selected search criteria and entered search terms will directly affect their ability to access opportunities. New users should take some time to experiment with the Advanced Search Tool to experience first-hand how seemingly small changes to criteria can result in significantly different returned results.

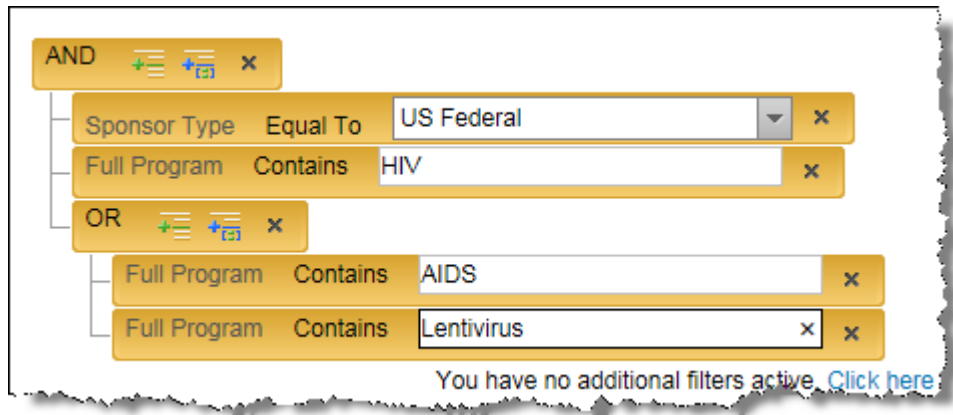
The Advanced Search Tool offers searching flexibility to users with very particular needs, but in some cases it may do nothing more than replicate Basic Search functions if it is not utilized with precision.

8.2.3 Remove Item Function

At any point in the **Advanced Search Mode**, users can remove expressions one by one, or remove entire groups of expressions by using the Remove Item Function. Depending on how users remove conditions and limitations, their number of returned results may remain static, increase, or decrease.

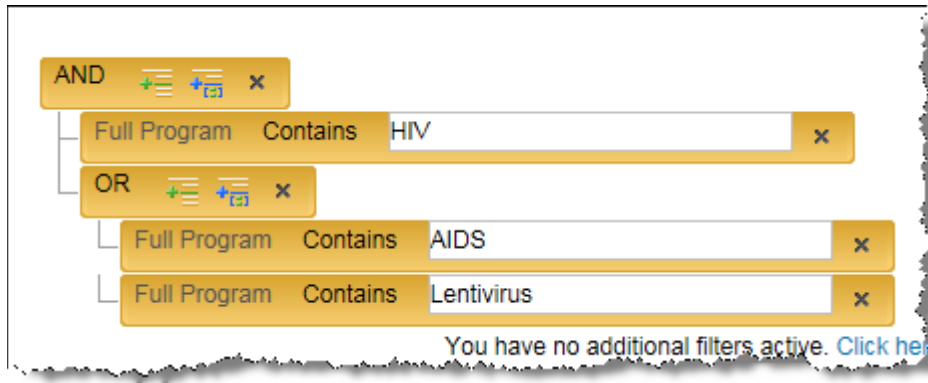
8.2.4 Removing Individual Search Criteria & Expressions

- ✓ In this example, we are going to remove one of the search's conditions and limitations—expressed by our choice of criteria from the menu of 36 criteria and by our entered search term—from our HIV query by using the **Remove Item Function**.



Let's look for the same kind of opportunities, but expand our search to include all possible Sponsor Types.

Step 1 Click the **x** located within **Sponsor Type Equal To US Federal**. The field disappears as shown below.



In this case, we have expanded our returned opportunities by removing a search criteria.

Step 2 Click the **Locate Funding** Button.

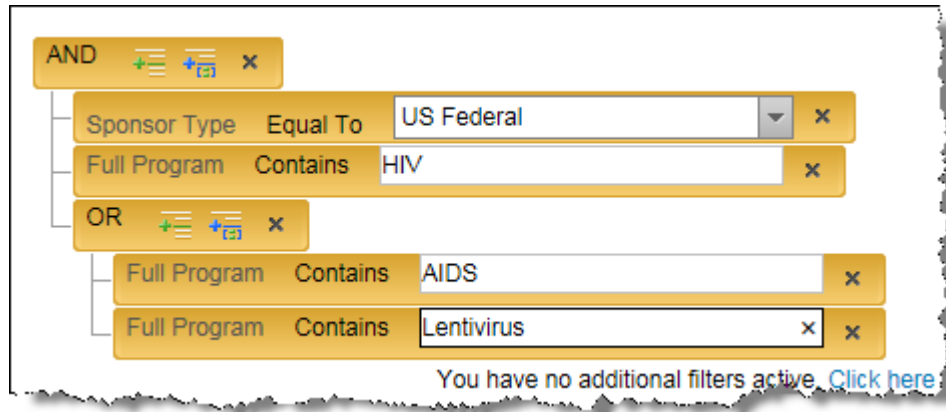
Our Advanced Search is now telling SPIN that all returned opportunities *must*:

- Contain the word HIV somewhere within the text of the Full Program; **AND**,
- Contain *either* the term AIDS **OR** Lentivirus within the Full Program text.

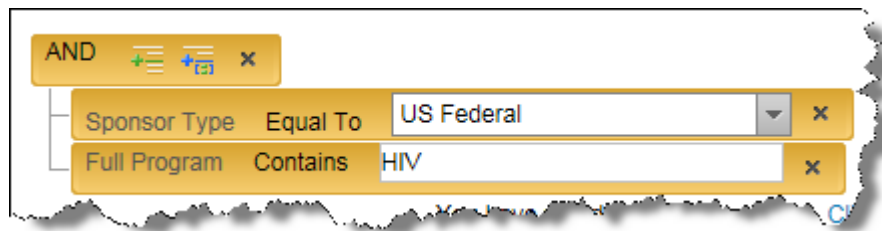
Compared to the baseline search, the SPIN search is no longer limited to only US Federally-Sponsored opportunities. Hence, the number of returned results can only increase.

8.2.5 Removing Groups of Search Criteria & Expressions

- ✓ In this example, we are going to remove an entire group of criteria from our original HIV search, which is shown below.



- Click the **x** located within **OR** . Note that this bar is located above our AIDS and Lentivirus expression fields. The entire group disappears, as shown below.



In this case, we have may have expanded or reduced our returned opportunities by removing the grouped OR functions.

Our Advanced Search is now telling SPIN that all returned opportunities *must have*:

- A US Federal Sponsor, **AND**;
- Must contain the word HIV somewhere within the text of the Full Program.

By removing the grouped OR functions in this search, we are telling SPIN that the results must not necessarily contain the term AIDS nor the term Lentivirus in the Full Program text. The results might still happen to contain those terms.

Additionally, the number of returned opportunities will typically decrease because we are being more restrictive in our search having removed additional OR criteria (looking only for opportunities containing HIV rather than opportunities containing either HIV, or AIDS or Lentivirus).

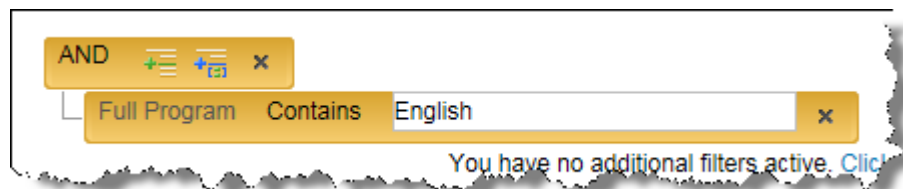
8.2.6 Combining Multiple Expressions & Groups

Now that the basic steps of the AND/OR, Add Expression, Add Group, and Remove Item Functions have been established, we can review a more complex Advanced Search to reiterate how multiple expressions and groups interact.

- ✓ In this example, we are going to search for opportunities related to the academic field of English.

Using the instructions provided in previous sections:

Step 1 Enter English as your first expression.

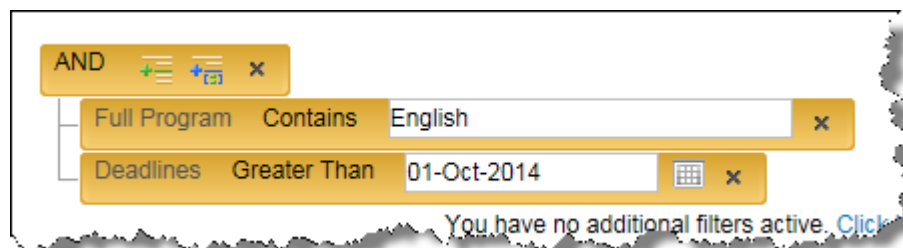


SPIN has defaulted to the Full Program Criteria, which is suitable for this example, as we are going to have SPIN search the Full Program text. SPIN has also defaulted to the AND Option, as opposed to OR.

Next, we want to make sure that all the returned opportunities have deadlines that are far enough into the future that we will have adequate time to respond to them. Imagine that it is currently mid-summer. Let's look for opportunities whose deadlines come after October 1st.

Using the instructions provided in previous sections:

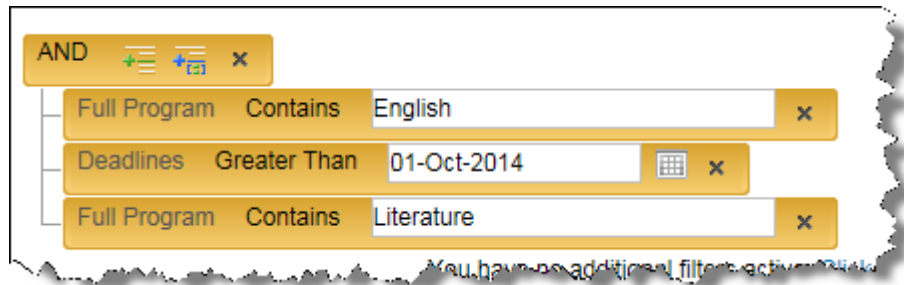
- Add another expression, and choose the Deadlines Criteria. Enter October 1st.



Note that this addition required four steps: clicking the Add Expression Button; choosing one of 36 criteria from the pull-down menu; placing a relative limitation (greater than) on that criteria; and, using the calendar icon to select a date that relates back to the limitation. These steps are described in the previous subsections.

Now, we are going to add another term to our search, while staying within the AND Function.

Step 1 Add the term Literature within a new expression field.



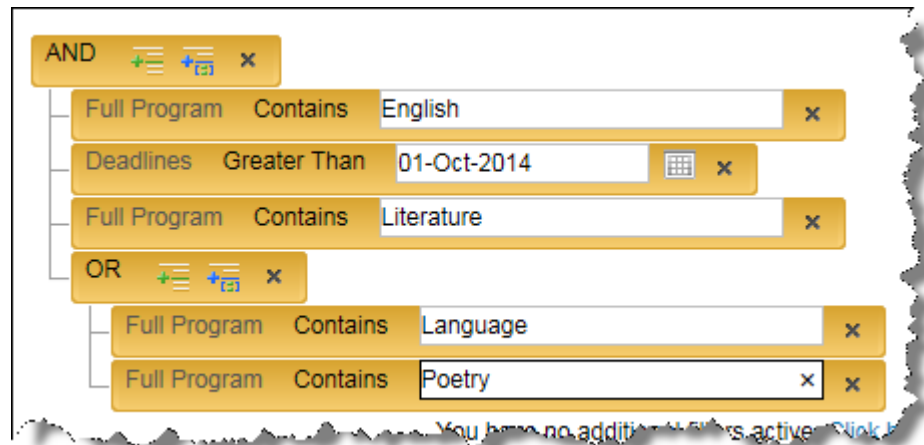
We have now directed SPIN to search the full text of all opportunities with deadlines after October 1, 2013, for those that contain the words English AND Literature. *If the opportunity does not contain both terms, it will not show up in the results.* The lines to the left of the fields reflect that fact and help orient users.

Now, we are going to include additional conditions by using a new group. Using the instructions provided previously:

Step 2 Add a new OR group, and enter the term Language.

Step 3 Then add another expression: Poetry.

Our advanced search will now look like this:



Our Advanced Search is now telling SPIN the program text within all returned opportunities must contain:

- Deadlines after October 1st, 2014; **AND**
- The words English AND Literature; **AND**,
- The word Language **OR** the word Poetry.



**Key
Concept**

Using the AND Group in searches requires all of the criteria beneath the AND Function Bar to be present. Using the OR Group requires one or another criteria beneath the OR Function Bar to be present. Users may add an unlimited number of expressions or groups, resulting in increasing levels of precision.

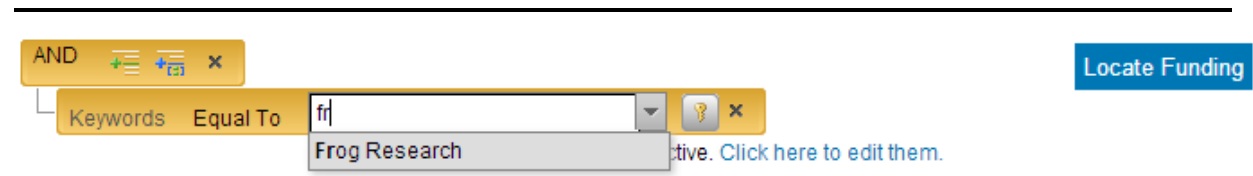
8.2.7 Using Keywords During Advanced Searches

As described in Section 7—Conducting an Advanced Search, users can access 36 Program Criteria while searching for opportunities on SPIN. One of these 36 criteria is “Keywords.”

Within the Advanced Search Mode, choosing Keywords as the Program Criteria allows users to choose keywords as their search expression. Users can choose from their own saved groups of keywords, and/or from those that were shared with them by other users.


Figure 43 shows how such a scenario would appear within the Advanced Search Screen.

Figure 43 Using Keywords as Program Criteria



As you can see in Figure 43, as the user began to type the term Frog Research into the search field, an auto-generated list appeared, showing that SPIN recognizes this saved Keyword Group. The auto-generated list will include all of the user’s keyword groups.

Alternately, the user could do the following:

- Click on . This is the Keywords Icon.

The **InfoEd Keywords Search Popup** will open up, as depicted in Figure 38.

From this point, the user would have to conduct a new Keywords Search, as described in Section 7, save their new Keyword Group, then return to the Advanced Search Mode to access it as one of the Program Criteria.

- ❖ See Section 8.1—Advanced Search Tool, for more information on how the Advanced Search Mode and Program Criteria work.

9 Returned Results

After establishing search parameters using either the Basic, Keyword or Advanced Search Mode, SPIN provides users with “returned results.” Returned results are a list of funding opportunities that adhere to the search parameters the user selected from menus, and to the terms he or she entered into the empty search fields.

Figure 44 Returned Results Screen

Results Found: 8 [Reset Filters](#) [Export](#) ▼

Group by: drag and drop a column header to this section

<input type="checkbox"/>	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount *	Bookmark
<input type="checkbox"/>	01758	Starter Grants	Amyotrophic Lateral Sclerosis Association		12-Jan-2015	40,000.00 USD	+
<input type="checkbox"/>	21240	Multi-Year Research Grants	Amyotrophic Lateral Sclerosis Association		12-Jan-2015	240,000.00 USD	+
<input type="checkbox"/>	74532	Milton Safenowitz Post-Doctoral Fellowship Award	Amyotrophic Lateral Sclerosis Association		12-Jan-2015	100,000.00 USD	+
<input type="checkbox"/>	07555	Research Program	Fondation Thierry Latran		18-Dec-2014	Not Specified	+
<input type="checkbox"/>	06454	Research Grant	Muscular Dystrophy Association		15-Dec-2014	60,000.00 USD	+
<input type="checkbox"/>	57634	Conference 'Special' Grants	Muscular Dystrophy Association		Continuous Submission	Not Specified	+
<input type="checkbox"/>	84672	Clinical Research Training Grant (CRTG)	Muscular Dystrophy Association		15-Dec-2014	180,000.00 USD	+
<input type="checkbox"/>	42049	RFA-AG-15-008-- Aging and Neuromuscular Junctions (R01)	National Institute on Aging/NIH/DHHS	RFA-AG-15-008	29-Dec-2014	1,250,000.00 USD	+

1 10 Displaying items 1 - 8 of 8

SPIN ID	An InfoEd-generated ID number associated with the opportunity.
Opportunity Title	The name that the Sponsor gave the opportunity.

Sponsor Name	The name of the agency/organization Sponsoring the opportunity.
Sponsor Number	A Sponsor-generated number assigned to the opportunity. Not all opportunities have associated Sponsor Numbers.
Deadline Date	The next acceptable date for applicants to submit materials to the Sponsor. If an opportunity has more than one deadline, the date shown is the next available deadline.
Funding Amount	The monetary valuation of the opportunity, shown in the user's currency of choice (see Section 10.2.6, Currency Display).

9.1 Exploring & Organizing Results

SPIN's **Returned Results Screen** (Figure 44) contains basic features to help users navigate through their opportunities:

- The Opportunity Count;
- The Display Counter;
- The Page Counter & Navigation Bar; and,
- The View Details Arrows, Sorting Arrows & Checkbox.

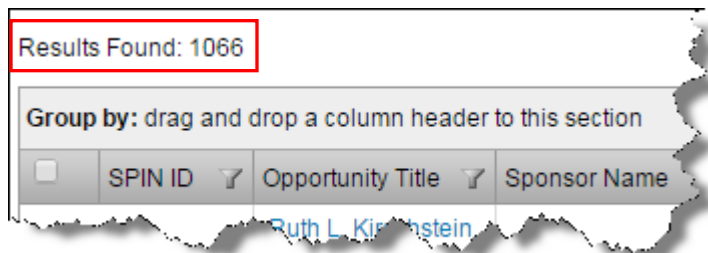
After users have oriented themselves to the desired returned results, they can do the following, as described in the corresponding subsections herein.

- Open Opportunity Information Links
- Sort Results
- Filter Results

9.1.1 Opportunity Count

In the upper, left-hand corner of the **Returned Results Screen** (Figure 44), there is a display-only count of the number of opportunities returned as a result of the current search being run.

- ✓ In this example, the user searched for “biology” opportunities and SPIN returned 1,066 opportunities.

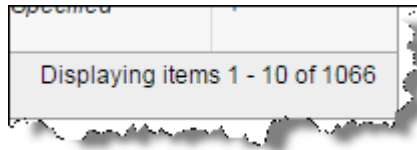


The Opportunity Count is SPIN-generated, and cannot be manipulated. The number of returned results is dependent upon many factors, as described throughout this manual.

9.1.2 Display Counter

In the lower, right-hand corner of the **Returned Results Screen** (Figure 44) a Display Counter presents how many opportunities are being shown on the current screen, in relation to the total number of returned results.

- ✓ In this example, the user's screen is displaying the 1st-10th opportunities, out of the total number of 1,066 returned.



9.1.3 Page Counter & Navigation Bar

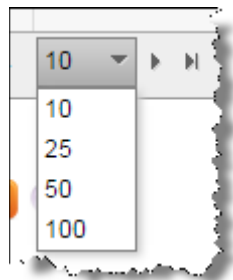
In the lower, left-hand corner of the **Returned Results Screen** (Figure 44) a Page Counter & Navigation Bar allows users to move easily among all pages of returned opportunities. Users can also choose how many opportunities they want to appear on their screen at one time.

- ✓ In this example, the user is currently on Page 7 of the returned results, if the results are presented 10 per page.




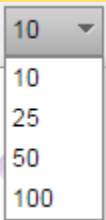




The Page Counter's & Navigation Bar's appearance will vary slightly, depending on how many pages of results are returned.



- ✓ Our example search "biology" resulted in 1,066 opportunities being returned. That means if we leave the opportunities per page set as it is, there will be 106 screens available to view.





The functions within these features are standard online tools, as described below:



	<p>Clicking this takes users back to the very first page of opportunities, at any time.</p>
	<p>Clicking this takes users to the previous numbered page, at any time. For example, if the user is currently on Page 22, he or she will be brought back to Page 21.</p>
	<p>This part of the bar shows arbitrary page number(s) for the returned results. The initial view displays numbers 1 through 10. If there are more than 10 pages of opportunities, an ellipsis (...) will follow the number 10.</p> <p>Clicking directly onto the ellipsis will display the next 10 page numbers.</p> <p>Clicking any displayed number takes the user to the corresponding page number of results. The white box shows users which page they are currently viewing.</p>
	<p>This pull-down feature allows users to choose how many results per page will be displayed.</p> <p>The selected number directly affects how many total page numbers will be shown in the navigation bar, as described in the row above.</p>
	<p>Clicking this takes users forward one page to the next numbered page. For example, if the user is currently on Page 21, he or she will be brought to Page 22.</p>
	<p>Clicking this button will take users to the very last page of opportunities.</p>



9.1.4 View Details Icons

Within the navigation, sort, and filter features on the **Returned Results Screen** (Figure 44) users will find icons of two different styles,  or , located to the left side of the listed opportunity.

Clicking on the  icon once results in details about each opportunity appearing on the screen whereby the icon will immediately change to  (see below illustration).

	15801	Edwin G. Conklin Medal	Society for Developmental Biology	15-Dec-2014	2,000.00 USD	
Detail Field Name		Detail Field Data				
Contact Name						
Contact Telephone		301-634-7815				
Contact Email		ichow@sdbonline.org				
Sponsor Website		http://www.sdbonline.org/index.php?option=content&task=view&id=8				
Program URL		http://www.sdbonline.org/uploads/files/Conklin_nomination2015.pdf				
Deadline Dates (ALL)		15-Dec-2014				
Synopsis		The award recognizes a developmental biologist who has made and is continuing to make extraordinary research contributions to the field, and who is also an excellent mentor who has helped train the next generation of outstanding scientists.				
Indirect Costs		Undetermined				

Clicking on the  icon re-hides the details from view whereby the icon will immediately change to  (see below illustration).

	15801	Edwin G. Conklin Medal	Society for Developmental Biology	15-Dec-2014	2,000.00 USD	
---	-------	------------------------	-----------------------------------	-------------	--------------	---

The View Details Icons are useful for saving screen space when navigating through long lists of opportunities, or for quickly reviewing opportunity information as navigation proceeds.

Which types of details appear within these revealed screens depends on how the user sets up their default column options.

- ❖ See Section 10.3—Detail View Column Options for a description of how to make these selections.

9.1.5 Sorting

Clicking directly on the criteria name can be used to change the order of results among ascending or descending options, either numerically or alphabetically.

- ✓ In this example, clicking on Sponsor Name **Sponsor Name ▲** will sort the results list data alphabetically from A to Z as indicated by the downward pointing arrow that appears after clicking **Sponsor Name ▼**.
- ✓ Clicking Sponsor Name again **Sponsor Name ▼** will re-sort the results list data in reverse order, and the arrow will now point upward **Sponsor Name ▲**.

9.1.6 Checkbox

Users have the option of clicking into (checking) the small, white box in the upper left-hand side of the **Returned Results Screen**.



This causes details for every returned opportunity to be revealed at the same time. Clicking in the box again re-hides the details.

Group by: drag and drop a column header to this section							
<input checked="" type="checkbox"/>	SPIN ID	Opportunity Title	Sponsor Name ▼	Sponsor Number	Deadline Date	Funding Amount*	Bookmark
<input type="checkbox"/>	02379	Smithsonian Tropical Research Institute Short-Term Fellowships	Smithsonian Institution		15-Jan-2015	Not Specified	+
		Detail Field Name	Detail Field Data				
		Contact Name	Adriana Bilgray				
		Contact Telephone	507-212-8031				
		Contact Email	fellows@si.edu				
		Sponsor Website	http://www.stri.si.edu/english/education_fellowships/fellowships/index.php				
		Program URL	http://www.stri.si.edu/english/education_fellowships/applications/application_for_fellowship.php				
		Deadline Dates (ALL)	15-Oct-2014, 15-Jan-2015, 15-Apr-2015, 15-Jul-2015				
		Synopsis	The STRI Short-Term Fellowship Program allows selected candidates to come to STRI year-round and is an excellent resource to provide support for graduate students and introduce them to tropical research.				
		Indirect Costs	Undetermined				
		Citizenship Restrictions	No Restrictions				
<input type="checkbox"/>	20261	A. Stanley Rand Fellowship Program	Smithsonian Institution		15-Jan-2015	Not Specified	+
		Detail Field Name	Detail Field Data				
		Contact Name					

9.1.7 Opportunity Information Links

As shown in the returned results header within the **Returned Results Screen** (Figure 44) each Opportunity Title is presented in a hyperlinked format (blue text color).

Clicking on the link opens a new browser window with information about that specific opportunity.

Within each of these screens, users are able to learn much more about an opportunity, as well as share it with others, and find similar opportunities.

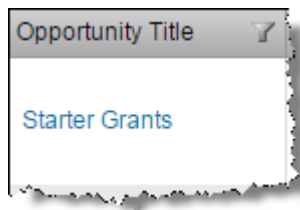
Group by: drag and drop a column header to this section							
<input type="checkbox"/>	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount *	Bookmark
<input type="checkbox"/>	01758	Starter Grants	Amyotrophic Lateral Sclerosis Association		12-Jan-2015	40,000.00 USD	+



For Example

In this example, we are going to explore an opportunity within the returned results—SPIN ID #01758, as shown above.

Step 1 Click on the linked opportunity title link (Starter Grants).



A new, independent window opens up showing extensive information about this opportunity, as shown in Figure 45.

Figure 45

Opportunity Information Window

Email ▾ Options ▾ Administration ▾

Starter Grants

Sponsor Name: Amyotrophic Lateral Sclerosis Association

+ Bookmark Program

Opportunity Description | Eligibility Requirements | Funding Guidelines | Sponsor Information

Synopsis

The ALS Association offers one-year awards of up to \$40,000 for new investigators entering the field of amyotrophic lateral sclerosis (ALS). Alternatively, they can be pilot studies by ALS investigators.

Program Objectives

Applications do not require strong preliminary data but must emphasize innovation, scientific merit, feasibility and relevance to ALS.

Keywords

Biomedical Research, Multidisciplinary
Amyotrophic Lateral Sclerosis (ALS)

Funding Opportunity Number:

CFDA Number:
Deadline Date: 12-Jan-2015
All Deadline Dates: 12-Jan-2015
Abstracts are accepted from December 1st, 2014 to January 12th, 2015. Full applications, if invited, are due on March 9th, 2015.
Deadline Type: Receipt
Established Date: 07-Jun-1982
Last Revised Date: 21-Nov-2014
Next Followup Date: 01-Dec-2015

Institution Instructions

Please contact William DeCocco for instructions on applying to this opportunity.
wdecocco@infoedglobal.com
Questions may be directed to Keith Willis
1-800-727-6427

* Daily conversion rates provided by XE.com. [Terms of Use.](#)

Within this Opportunity Window, users may do the following:

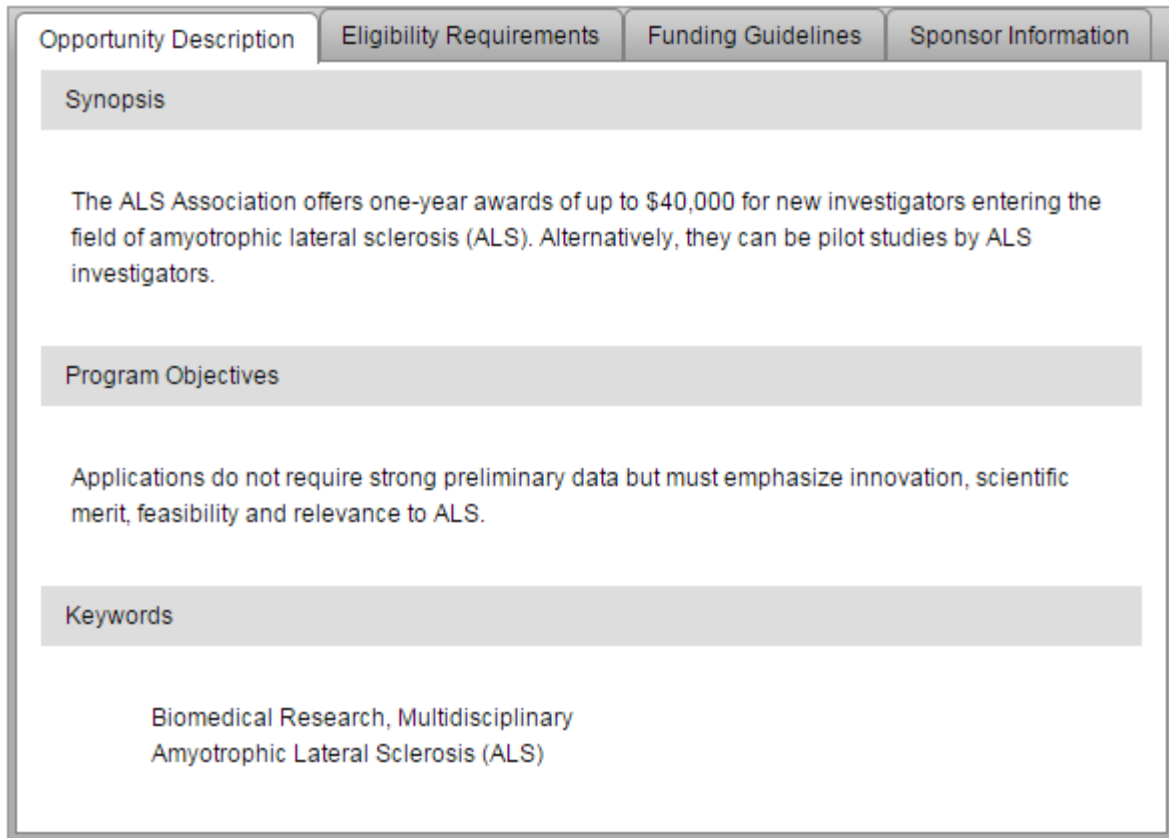
- Toggle between four tabs to view information corresponding to the tab name;
- Email the opportunity description in HTML or plain text format;
- Bookmark the opportunity (see 13—Bookmarks Menu); and/or,
- Find similar opportunities and export them.

Additionally, Institution Administrators can do the following:

- Check the SMARTS-related activity associated with this opportunity.

9.2 Opportunity Description Tab

Viewing the tabs from left to right, the Opportunity Description Tab appears first within the **Opportunity Information Window** (Figure 45), as shown below.



The screenshot shows a window with four tabs: Opportunity Description, Eligibility Requirements, Funding Guidelines, and Sponsor Information. The Opportunity Description tab is active and displays the following content:

- Synopsis**
The ALS Association offers one-year awards of up to \$40,000 for new investigators entering the field of amyotrophic lateral sclerosis (ALS). Alternatively, they can be pilot studies by ALS investigators.
- Program Objectives**
Applications do not require strong preliminary data but must emphasize innovation, scientific merit, feasibility and relevance to ALS.
- Keywords**
Biomedical Research, Multidisciplinary
Amyotrophic Lateral Sclerosis (ALS)

The following information is displayed within this tab:

Synopsis	This field shows the opportunity's synopsis.
Program Objectives	This field shows the opportunity's primary program objectives.
Keywords	This field displays keywords that are related to the opportunity.

9.3 Eligibility Requirements Tab

The second tab on the **Opportunity Information Window** (Figure 45) is the Eligibility Requirements Tab.

Opportunity Description	Eligibility Requirements	Funding Guidelines	Sponsor Information
Eligibility Requirements			
All nationalities are welcome to apply and awards are made to non U.S.A. based investigators. Applications from junior postdoctoral fellows for starter grants are not invited.			
Applicant Location Requirements			
Applicant Types Eligible			
Researcher or Investigator			
Project Types Supported			
Seed Money or Start-up Funding, Research Grant			
Project Locations Allowed			
Citizenship Requirements			
Sponsor's Target Groups			

The following information is displayed within this tab:

Eligibility Requirements	This field displays the eligibility requirements for the applicant.
Applicant Location Requirements	This field contains information about where applicants must live or work to be eligible to apply for the opportunity.

Applicant Types Eligible	This field shows the type(s) of applicants who are eligible to apply for the opportunity.
Project Types Supported	This field shows the project type(s) supported by the opportunity.
Project Locations Allowed	This field shows the acceptable project location(s) related to the opportunity.
Citizenship Requirements	This field shows the citizenship requirements that the applicant must satisfy in order to apply for the opportunity.
Sponsor's Target Groups	This field denotes the primary group that will receive indirect benefit(s) as a result of the opportunity.

9.4 Funding Guidelines Tab

The third tab on the **Opportunity Information Window** (Figure 45) is the Funding Guidelines Tab.

Opportunity Description	Eligibility Requirements	Funding Guidelines	Sponsor Information
Funding Guidelines			
The maximum amount awarded is \$40,000. (des)			
Funding Amount	Duration	Sponsor Currency Type	
\$40,000.00 maximum	0	USD	
Total Potential Amount *			
40,000 USD USD			
Cost Sharing	Indirect Costs		
Not Required	Not Allowed		

The following information is displayed within this tab:

<i>Funding Guidelines</i>	This field provides a description of the Sponsor's funding guidelines for the opportunity.
<i>Funding Amount</i>	This shows the anticipated amount of funding available for the opportunity in the sponsor's native currency.
<i>Duration</i>	This field shows the duration of the opportunity, as established by the Sponsor.
<i>Sponsor Currency Type</i>	This field shows the currency type used by the Sponsor.
<i>Total Potential Amount</i>	This field shows the funding amount converted to the currency set in the Search Options (see Section 10.2.6).
<i>Cost Sharing</i>	This field displays whether or not the opportunity requires cost sharing.
<i>Indirect Costs</i>	This field displays whether or not the opportunity allows indirect cost recovery.

9.5 Sponsor Information Tab

The fourth tab on the **Opportunity Information Window** (Figure 45) is the Sponsor Information Tab.



The screenshot shows a window with four tabs: Opportunity Description, Eligibility Requirements, Funding Guidelines, and Sponsor Information. The Sponsor Information tab is active and displays the following text:

Sponsor Contact Information

1275 K Street NW, Suite 250
Washington
DC
20005
U.S.A.
Phone: 202-407-8580
Fax: 202-289-6801
E-Mail: researchgrants@alsa-national.org
Website: <http://www.alsa.org/>
Program URL: <http://www.alsa.org/research/for-researchers/call-for-abstracts.html>
Sponsor Instructions: <http://www.alsa.org/research/for-researchers/investigator-initiated.html>

The following information is displayed within this tab:

Sponsor Contact Information	<p>This field is a display-only text box containing the Sponsor's contact information, which includes the elements listed below.</p> <ul style="list-style-type: none">▪ Contact Name▪ Contact Title▪ Contact Mailing Address▪ Contact Phone Number▪ Contact Fax Number▪ Contact Email Address▪ Sponsor/Contact Website URL▪ Opportunity URL▪ Sponsor Instructions
------------------------------------	--

9.5.1 Bookmark Program Button

On the right side of the **Opportunity Information Window** (Figure 45), the following appears:

+ Bookmark Program

Clicking this button allows users to access the Bookmark Function of SPIN.

- ❖ See Section 9.6—Bookmarking Opportunities for more information.
- ❖ See Section 13—Bookmarks Menu for more information.

9.5.2 Information Boxes

On the right-hand side of the **Opportunity Information Window** (Figure 45), two grey and white boxes are shown. The Funding Opportunity Number top box is shown below.

Funding Opportunity Number:

CFDA Number:

Deadline Date: 12-Jan-2015

All Deadline Dates: 12-Jan-2015

Abstracts are accepted from December 1st, 2014 to January 12th, 2015. Full applications, if invited, are due on March 9th, 2015.

Deadline Type: Receipt

Established Date: 07-Jun-1982

Last Revised Date: 21-Nov-2014

Next Followup Date: 01-Dec-2015

The following information is displayed within this box:

Funding Opportunity Number	This field shows Sponsor-assigned opportunity number. Not all opportunities have Sponsor-assigned numbers.
CFDA Number	This field shows the opportunity's Catalog of Federal Domestic Assistance (CFDA) Number (if applicable).
Deadline Date	This field contains deadline date for the applicant to apply for the opportunity.
Deadline Type	This field shows deadline type for the selected program.
Established Date	This field shows the date that the opportunity was established.
Last Revised Date	This field shows the date that the opportunity was last revised.
Next Followup Date	This field shows the next date that InfoEd Global will touch base with the Sponsor about the opportunity in order to update SPIN data.

The lowermost box contains instructions provided by the user's institution administrator to help users apply for the opportunity. These can only be set up by administrators. The instructions the Administrator chooses to place in Institution Instructions will universally appear in all grants at their institution, you cannot assign specific instructions to specific opportunities.

Institution Instructions

Please contact William DeCocco for instructions on applying to this opportunity.

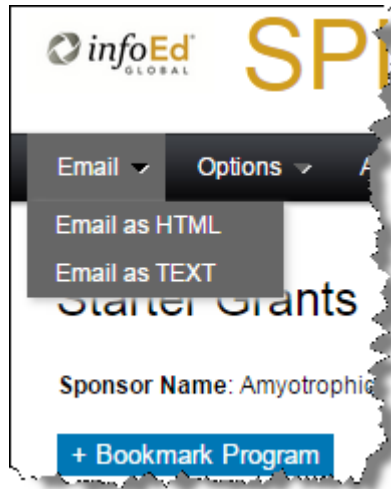
wdecocco@infoedglobal.com

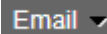
Questions may be directed to Keith Willis

1-800-727-6427

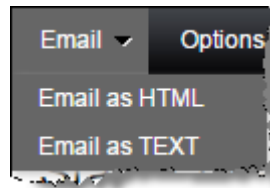
9.5.3 Email Menu

Users can use the Email Menu within the **Opportunity Information Window** (Figure 45) to send the information to themselves or others, as described below.



Step 1 Hover your cursor over the black arrow next to the **Email Menu** .

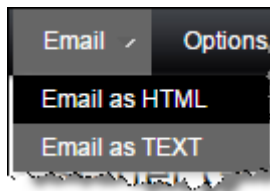
The arrow will turn white, and two options will appear beneath it, as depicted below.



Step 2 Decide on an email format. The HTML format sends the information with enabled links that the recipients can click on. The TEXT format sends the information as plain text.

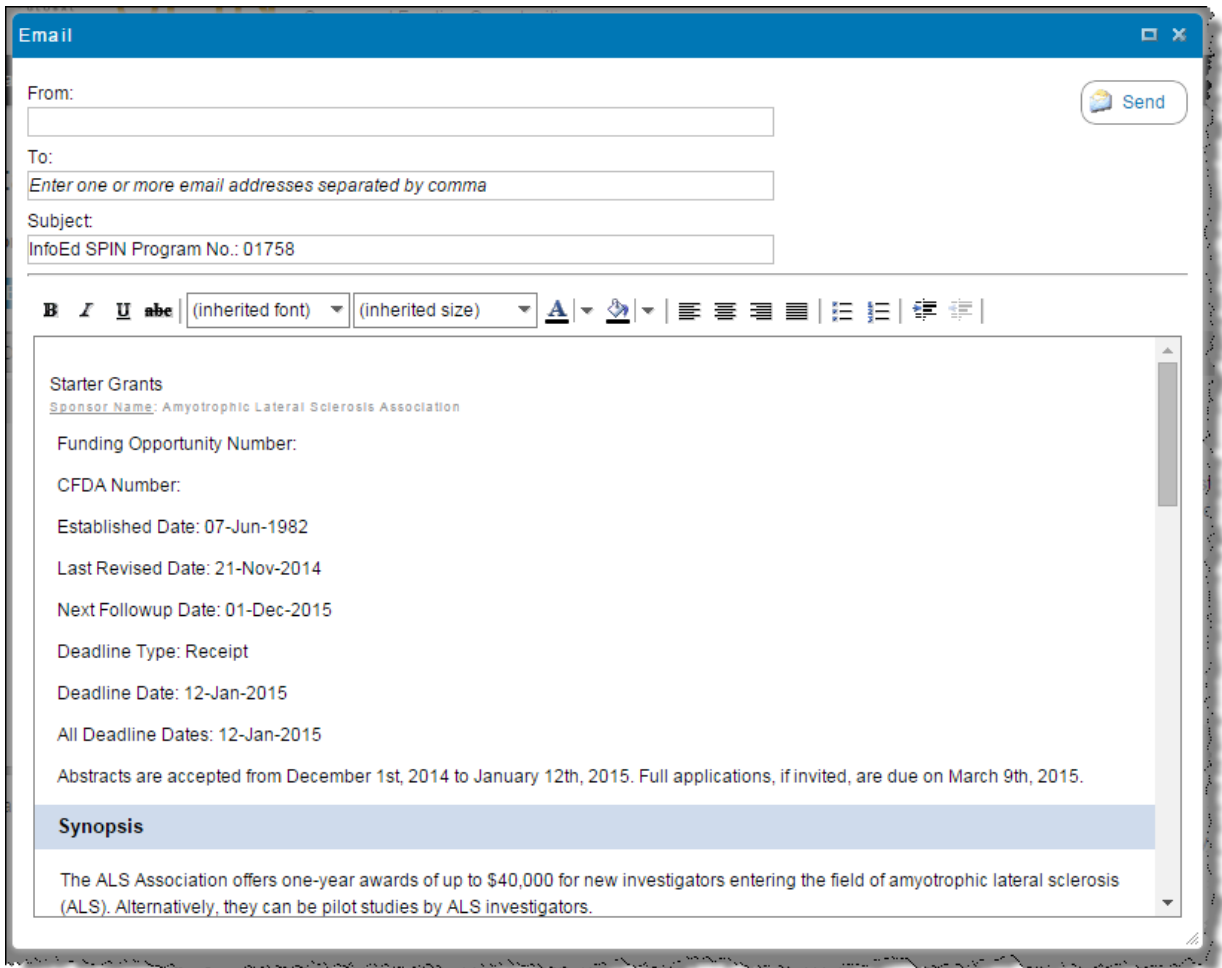
- ✓ In this example, we are going to choose HTML.

Step 3 Choose your format by moving your cursor over the format name, until the selection turns yellow.



Step 4 Click your mouse. The **Email Opportunity Window** opens up, as shown below in Figure 46.

Figure 46 *Email Opportunity Window*



SPIN will autofill the From Field of your email with the email address associated with your login. It also autofills the Subject Field with the SPIN Program Number of the opportunity you are emailing.

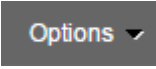
Step 1 Type the email address of the person you want to send the information to into the To Field.

Step 2 Click . After you click send, SPIN returns to you the **Opportunity Information Window** (Figure 45).

9.5.4 Search Menu

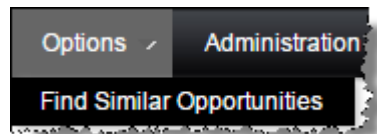
From the **Opportunity Details** (Figure 45), you can allow SPIN to automatically choose opportunities that are similar to the one you are reviewing. After the opportunities are generated, you can export them to Microsoft Word™ or Microsoft Excel™.

Step 1 Hover your cursor over the black arrow next to the **Options Menu**.



The arrow will turn white, and the Find Similar Opportunities Option will appear beneath it, as depicted below.

Step 2 Choose the option by moving your cursor over the option and select Find Similar Opportunities and click on it.



Once clicked, the **Find Similar Opportunities Window** opens up, as shown in Figure 47, with the opportunities that SPIN generated listed within it.

Figure 47

Find Similar Opportunities Window

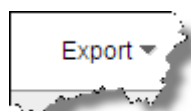
Group by: drag and drop a column header to this section							
<input type="checkbox"/>	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount*	Bookmark
<input type="checkbox"/>	41937	Biomedical Research Project Grants	Motor Neurone Disease Association		31-Oct-2014	255,000.00 USD	+
<input type="checkbox"/>	92703	Healthcare Research Grants (Temporarily Suspended)	Motor Neurone Disease Association		29-Jun-2009	Not Specified	+
<input type="checkbox"/>	13986	Research Grants	Frick (Bruno and Ilse) Foundation for ALS Research		30-Sep-2014	103,434.19 USD	+
<input type="checkbox"/>	71097	Research Grants	Foundation for Progressive Supranuclear Palsy (PSP)		15-Apr-2014	100,000.00 USD	+
<input type="checkbox"/>	28138	Sheila Essey Award - An Award for ALS Research	American Academy of Neurology		23-Oct-2014	50,000.00 USD	+
<input type="checkbox"/>		Multi-Year Research	Amyotrophic				

Within this window SPIN users can use the sorting, grouping, and filtering features that are described throughout the rest of this manual.

- ❖ See Section 9.5.7-Sorting Results
- ❖ See Section 9.5.10—Filtering Results

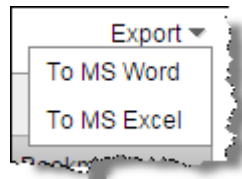
9.5.5 Using the Export Function

The **Find Similar Opportunities Window** (Figure 47) has an Export Function located at the top right corner of the screen that allows users to easily transfer the information into a Microsoft Word™ or Microsoft Excel™ file.

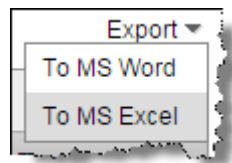


In this example, we are going to export our SPIN-generated similar opportunities to an Excel™ file.

Step 1 Click on **Export** in the upper, right-hand corner of the **Find Similar Opportunities Window**. The following will appear.



Step 2 Choose MS Word™ or MS Excel™ by hovering over your selection until it turns gray.



Step 3 Click on your desired selection (MS Excel).

Your computer's operating system will bring up a window asking you open or save the exported file, as shown below. You can open the file immediately, or save it to any location, and give it your own name.

Step 4 Make your selections and click  to complete the export.

The Excel or Word document (in our case it is GridResults.xls) will be created and the download will appear

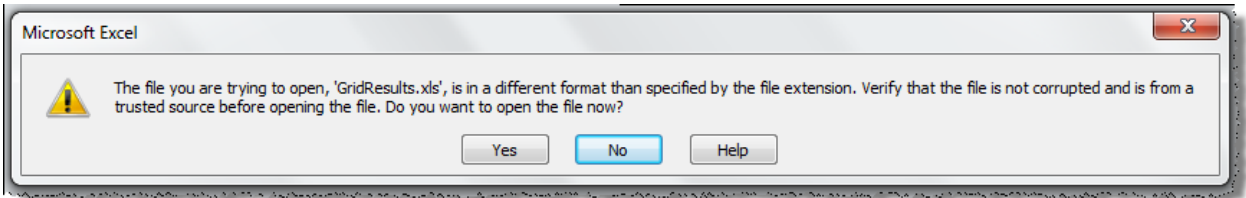
If you choose to open the file, your computer's operating system will automatically open Excel, and an automatically-generated grid will appear. If you choose to save the file first, you will be directed to choose a file location and name for the file on your local drive, and then you can access that file. Either way, the resulting file will look like the one depicted below in Figure 48.



Please Note

Whether you are opening the exported document or saving the exported document, the file type defaults to Microsoft Office Word 97-2003 with a ".doc" extension, or a Microsoft Office Excel 97-2003 with a ".xls" extension.

If you are running a more recent version of either program, the popup message shown below will appear.



The file is not corrupt, and is safe to open or save.

Figure 48 Exported Opportunities in Excel Format

SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount
01758	Starter Grants	Amyotrophic Lateral Sclerosis Association		12-Jan-2015	40,000 USD
21240	Multi-Year Research Grants	Amyotrophic Lateral Sclerosis Association		12-Jan-2015	240,000 USD
74532	Milton Safenowitz Post-Doctoral Fellowship Award	Amyotrophic Lateral Sclerosis Association		12-Jan-2015	100,000 USD
07555	Research Program	Fondation Thierry Latran		18-Dec-2014	Not Specified
06454	Research Grant	Muscular Dystrophy Association		15-Dec-2014	60,000 USD
57634	Conference 'Special' Grants	Muscular Dystrophy Association		Continuous Submission	Not Specified
84672	Clinical Research Training Grant (CRTG)	Muscular Dystrophy Association		15-Dec-2014	180,000 USD
42049	RFA-AG-15-008--Aging and Neuromuscular Junctions (R01)	National Institute on Aging/NIH/DHHS	RFA-AG-15-008	29-Dec-2014	1,250,000 USD

If you choose to export to Word, the information is put into a table format. The opportunity links shown in both the Word and Excel file formats are automatically enabled, and clicking on them will take you directly to the associated SPIN page. You can save and manipulate the file in any way you like.

Figure 49 Exported Opportunities in Word Format

SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date
01758	Starter Grants	Amyotrophic Lateral Sclerosis Association		12-Jan-2015
21240	Multi-Year Research Grants	Amyotrophic Lateral Sclerosis Association		12-Jan-2015
74532	Milton Safenowitz Post-Doctoral Fellowship Award	Amyotrophic Lateral Sclerosis Association		12-Jan-2015
07555	Research Program	Fondation Thierry Latran		18-Dec-2014
06454	Research Grant	Muscular Dystrophy Association		15-Dec-2014
57634	Conference 'Special' Grants	Muscular Dystrophy Association		Continuous Submission
84672	Clinical Research Training Grant (CRTG)	Muscular Dystrophy Association		15-Dec-2014
42049	RFA-AG-15-008--Aging and Neuromuscular Junctions (R01)	National Institute on Aging/NIH/DHHS	RFA-AG-15-008	29-Dec-2014

9.5.6 Administration Menu

From the **Opportunity Information Window** (Figure 45), administrators can explore the SMARTS history associated with the selected opportunity. You must be logged in as an administrator to use this feature.

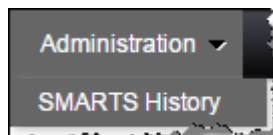
Figure 50 Opportunity Information Window – Administration Menu



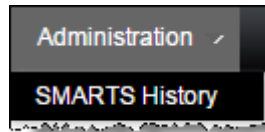
Step 1 Hover your cursor over the black arrow next to the **Administration Menu**.



The arrow will turn white, and the Smarts History Option will appear beneath it, as depicted below.



Step 2 Choose the option by moving your cursor over the option name, until the selection is shaded in black.



Step 3 Click your mouse.

A screen depicting the SMARTS notification history for this particular opportunity will open up, showing the names of the users at your institution who have received emails about the opportunity. See the following sections for more information.

Figure 51 Opportunity Information Window – Administration Menu



- ❖ See Section 14.4.2—Individual Reporting
- ❖ See Section 14.4.8—Archived SMARTS Sheets

9.5.7 Sorting Results

Once a user has returned a set of results, he or she can view that data in various presentations. This is called sorting. Sorting differs from filtering in that while sorting users manipulate *how the same total amount of data appears* on the screen. With filtering, users set parameters to *limit the amount of data returned and change how it appears on the screen*.

❖ See Section 9.5.10—Filtering Results

The following subsections describe the SPIN features which allow users to sort their returned results.

9.5.8 Modifying Column Presentation

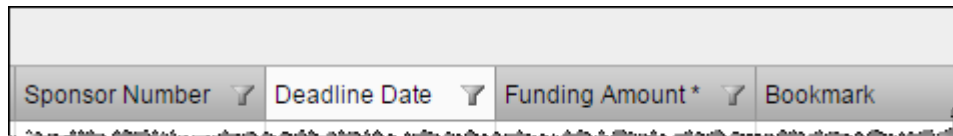
Users can modify the order of column appearance by moving the columns' positions using a drag and drop feature. As shown in Figure 44, the SPIN **Returned Results Screen** defaults to the following presentation order, from left to right: SPIN ID; Opportunity Title; Sponsor Name; Sponsor Number; Deadline Date; Funding Amount; and, Bookmark.



For Example

In this example, we are going to move Next Deadline Date all the way to the left, to make it become the column in the first position.

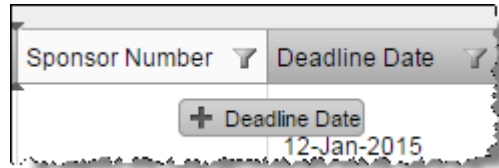
Step 1 Click into the Column Header Bar within the column you want to move.



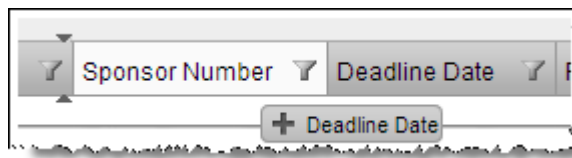
As you click into the column header area, the shading will change from dark grey to light grey.

Step 2 Keep your finger depressed on the mouse button, and begin to drag the column in the direction you want it to be located.

Step 3 As you begin to drag, another title appears below, indicating that you are in drag and drop mode. The circle with a slash through it is present until you move the column into any position in which it can be dropped.

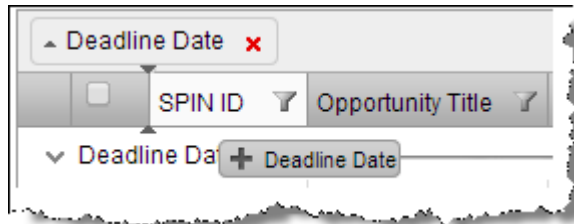


Then a plus sign will appear, along with two small black triangles, as shown below. The plus sign indicates you can drop the column. The triangles indicate where the column would be positioned should you let go of the mouse button.

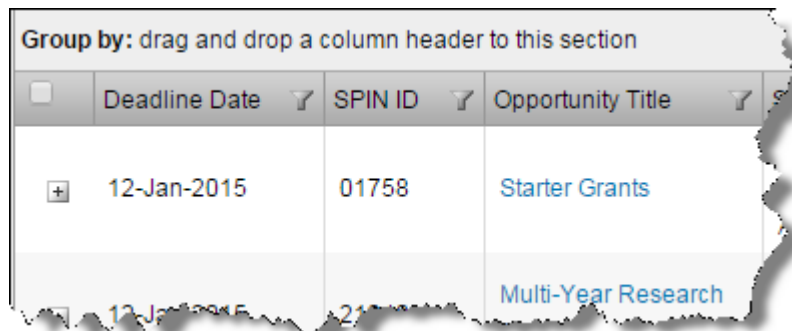


Step 4 Continue dragging until the black triangles appear on the left side of the column that you want your moving column to precede.

- ✓ Remember, in this example, we want the Deadline Date to appear first, which means it would need to be positioned before the SPIN ID Column.



Step 5 Let go of the mouse button. The column order has been altered, as shown below.



Group by: drag and drop a column header to this section			
<input type="checkbox"/>	Deadline Date	SPIN ID	Opportunity Title
<input type="checkbox"/>	12-Jan-2015	01758	Starter Grants
<input type="checkbox"/>	12-Jan-2015	21	Multi-Year Research

The user now sees the Deadline Date Column as the primary set of data. The columns can be rearranged in any order a user prefers.

Step 6 Click  to re-set the **Returned Results Screen** to the default column order.

9.5.9 Group By Feature

SPIN users can drag and drop columns within the **Returned Results Screen** (Figure 44) into an empty header above the returned results. This is called the Group By Feature.

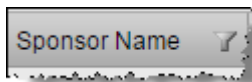
This feature differs from modifying the column presentation (described above). The latter affects the appearance of the returned results. In contrast, using the Group By Feature, allows users to create their own primary and secondary sorts, and add as many layers of sorting they want.



For Example

In this example, we are going to use the Group By Feature to create a sort with the Sponsor Name as the primary criteria, followed by the Next Deadline Date.

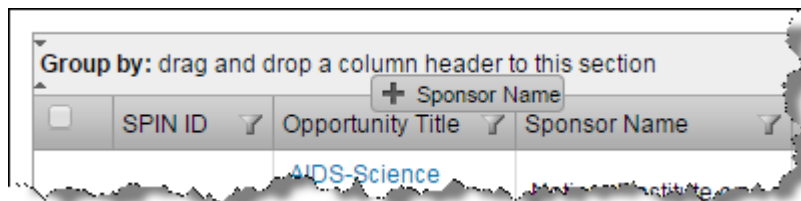
Step 1 Click within the Sponsor Name Column Header and hold your mouse button down.



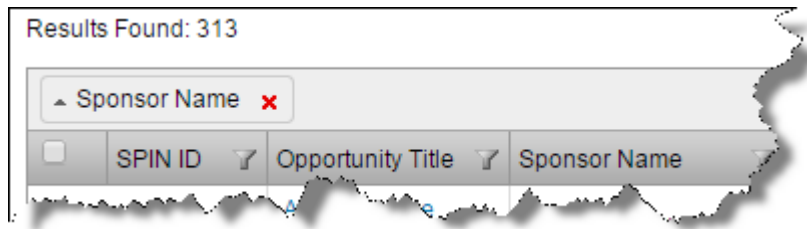
The header color will change from grey to white.



Step 2 With the mouse depressed, drag the column into the Group By Header above, as shown below.



The header now looks like this:



The **Returned Results Screen** changes significantly, as shown in Figure 52 below.

Figure 52 Returned Results Sorted Using Group By – Sponsor Name

Results Found: 313 Reset Filters Export

▲ Sponsor Name x

<input type="checkbox"/>	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount*	Bookmark
<input type="checkbox"/>	92559	AIDS-Science Track Award for Research Transition (R03)	National Institute on Drug Abuse/NIH/DHHS	PA-12-282	07-Sep-2015	200,000.00 USD	+
<input type="checkbox"/>	30548	Drug Abuse Aspects of HIV/AIDS (R01)	National Institute on Drug Abuse/NIH/DHHS	PA-12-293	07-Sep-2015	Not Specified	+
<input type="checkbox"/>	30549	Drug Abuse Aspects of HIV/AIDS (R03)	National Institute on Drug Abuse/NIH/DHHS	PA-12-294	07-Sep-2015	100,000.00 USD	+
<input type="checkbox"/>	30550	Drug Abuse Aspects of HIV/AIDS (R21)	National Institute on Drug Abuse/NIH/DHHS	PA-12-295	07-Sep-2015	275,000.00 USD	+
<input type="checkbox"/>	69800	Grants Program	Red Ribbon Charitable Foundation, Inc.		Continuous Submission	Not Specified	+
<input type="checkbox"/>	32630	Structural Interventions, Alcohol Use, and Risk of HIV/AIDS (R04)	National Institute on Alcohol Abuse and Alcoholism/NIH/DHHS	PA-13-191	07-Sep-2015	Not Specified	+

Users have access to the same returned results, but now they are organized alphabetically by Sponsor Name. If there are multiple opportunities offered by the same Sponsor, those would be grouped together, as shown above.

Additionally, detail arrows and the checkbox offer users the ability to reveal and hide details (see the subsection **View Details Arrows & Checkbox**).

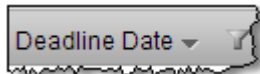


An Example

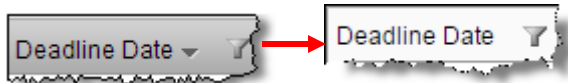
In this example, we decided to use the Group By Feature to create a sort with the Sponsor Name as the primary criteria.

Now we are going to add a second criteria.

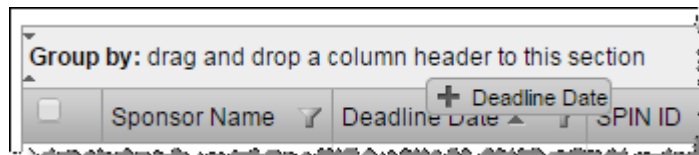
Step 1 Click within the Next Deadline Date Column Header and hold the mouse button down.



The header color will change from grey to white.



Step 2 With the mouse depressed, drag the column into the Group By Header above, as shown below.



Step 3 Release the mouse button when the plus sign appears.

The **Returned Results Screen** changes again. In this case, we now see Next Deadline Date information lined up below the Sponsor Name, as shown below.

Results Found: 313 Reset Filters [Export](#)

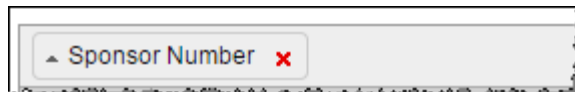
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount*	Bookmark	
92559	AIDS-Science Track Award for Research Transition (R03)	National Institute on Drug Abuse/NIH/DHHS	PA-12-282	07-Sep-2015	200,000.00 USD	+	
30548	Drug Abuse Aspects of HIV/AIDS (R01)	National Institute on Drug Abuse/NIH/DHHS	PA-12-293	07-Sep-2015	Not Specified	+	
30549	Drug Abuse Aspects of HIV/AIDS (R03)	National Institute on Drug Abuse/NIH/DHHS	PA-12-294	07-Sep-2015	100,000.00 USD	+	
30550	Drug Abuse Aspects of HIV/AIDS (R21)	National Institute on Drug Abuse/NIH/DHHS	PA-12-295	07-Sep-2015	275,000.00 USD	+	
69800	Grants Program	Red Ribbon Charitable Foundation, Inc.		Continuous Submission	Not Specified	+	
32630	Structural Interventions, Alcohol Use, and Risk of HIV/AIDS (R04)	National Institute on Alcohol Abuse and Alcoholism/NIH/DHHS	PA-13-191	07-Sep-2015	Not Specified	+	

Users can add as many criteria to the header as they want. Users can also rearrange the order of the criteria by moving them around the header in any fashion they want.

To remove a criteria, click on the X within its title, as shown below.



Step 1 Click the **X** and the selected criteria will disappear, as shown below.



Step 2 Users can also simply drag the criteria off of the header area to remove it.

9.5.10 Filtering Results

In addition to sort features, SPIN offers numerous options for filtering returned results. The filtering process involves sifting through a large number of returns to limit what the user will see.

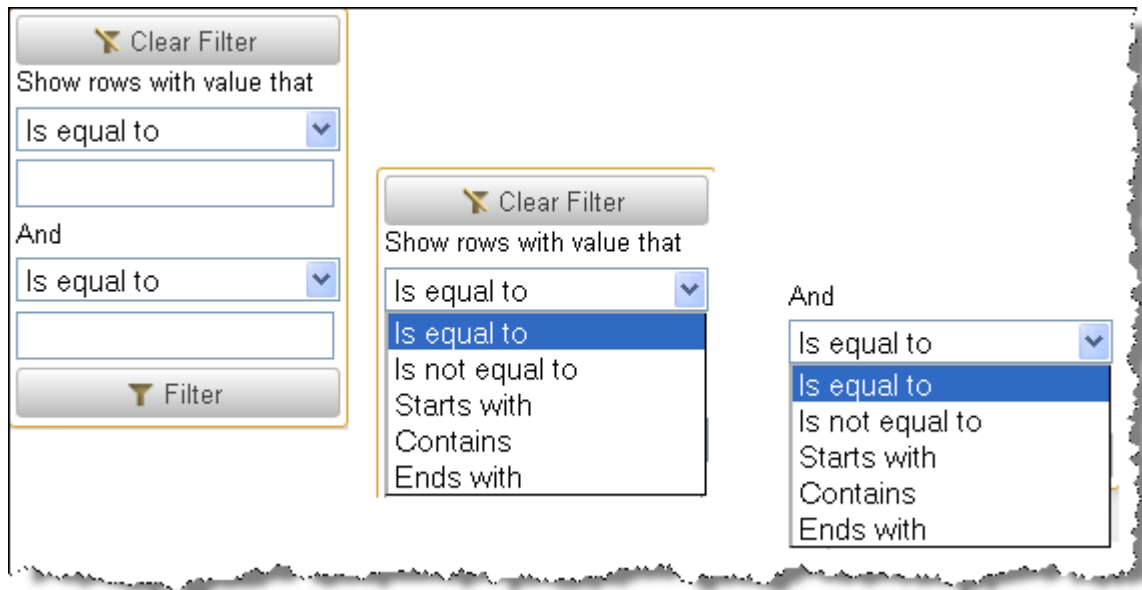
Every column within the **Returned Results Screen** (see Figure 44) has a filter function attached to it, with the exception of the Bookmark Column.

Figure 53 shows a **Filtering Drop Down Menu**, with two lists of options opened up. Users may filter their returned results by:

- Equal values;
- Values containing everything but a particular term or value;
- Values that start with a letter or number;
- Values that contains a particular term or value;
- Values that end with a name or number; and,
- Calendar values (Next Deadline Date Column only).

Users do not have to use both fields to execute a filter.

Figure 53 *Filtering Drop Down Menu*




**Please
Note**

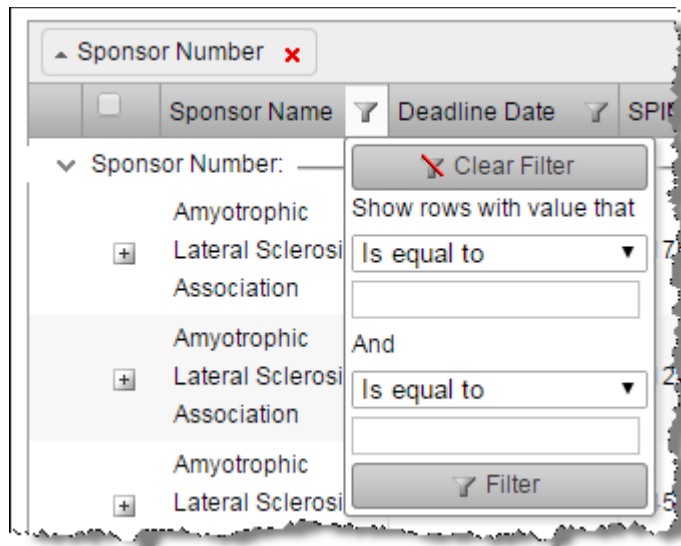
The Next Deadline Date Filter has a slightly different drop down menu than that depicted in Figure 15. It has a calendar feature attached to it. This is discussed below.



An Example

In this example, we are going to use the filter to find returned opportunities that are Sponsored by the Department of the Army.

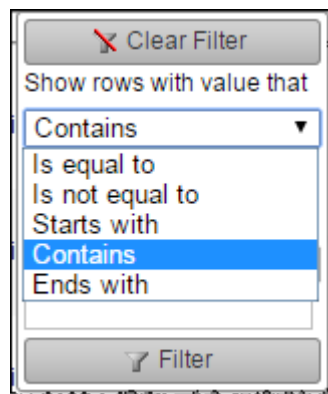
Step 1 From the **Returned Results Screen** (see Figure 44), click  within the Sponsor Name Column. A filtering menu will appear to the right of the column, as shown below.



Step 2 Since we are going to look for a particular word—Army—we are going to select the “Contains” option from the pull-down menu.

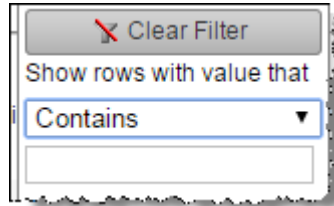
Step 3 Click on the arrow located next to the field that reads: “Is equal to”.

Step 4 Move your cursor down over the selections, until Contains turns blue.



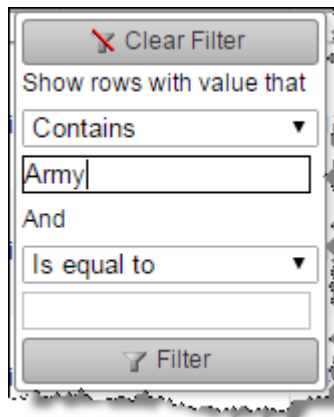
Step 5 Click on Contains.

Step 6 Place your cursor in the empty field and click.



A screenshot of a filter dialog box. At the top is a button labeled 'Clear Filter' with a red 'X' icon. Below it is the text 'Show rows with value that'. A dropdown menu is open, showing 'Contains' as the selected option. Below the dropdown is an empty text input field.

Step 7 Type in the word "Army."



A screenshot of the same filter dialog box. The dropdown menu is still set to 'Contains'. The text input field now contains the word 'Army'. Below the input field is the text 'And', followed by another dropdown menu set to 'Is equal to' and an empty text input field. At the bottom of the dialog is a button labeled 'Filter' with a funnel icon.



An Example

In this example, we only need to use the first filter field to get the results we want.

Step 8 Click the  button.

SPIN returns opportunities from the original search with Sponsor Names that contain the word Army, as shown below.



A screenshot of a search results table. The table has columns for Sponsor Name, Deadline Date, SPIN ID, Opportunity Title, Sponsor Number, Funding Amount, and Bookmark. The first row shows a result for the Department of the Army. The Opportunity Title is 'U.S. Army Medical Research and Materiel Command Broad Agency Announcement for Extramural Medical Research'. The SPIN ID is 43774 and the Sponsor Number is W81XWH-BAA-15-1. The Funding Amount is 'Not Specified'. The table is filtered by 'Sponsor Name: Department of the Army'. The footer shows 'Displaying items 1 - 1 of 1'.

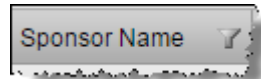
Sponsor Name	Deadline Date	SPIN ID	Opportunity Title	Sponsor Number	Funding Amount *	Bookmark
Department of the Army		43774	U.S. Army Medical Research and Materiel Command Broad Agency Announcement for Extramural Medical Research	W81XWH-BAA-15-1	Not Specified	+



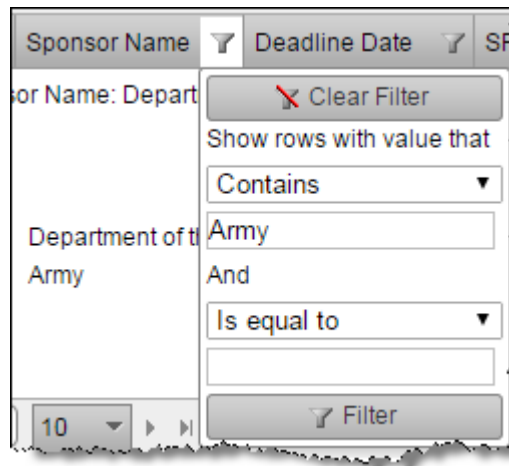
An Example

Now we are going to return to our original search results, and apply a new filter using more than one criteria.

Step 1 Click on the gray-highlighted filter icon within the column that you just used as your filtering criteria—in this case Sponsor Name.



The filtering menus will open up again, as shown below.



Step 2 Click the  button.

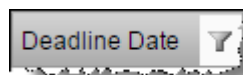
The menu will retract into the column header, and your original search results will reappear (see Figure 44). You can now apply another filter.



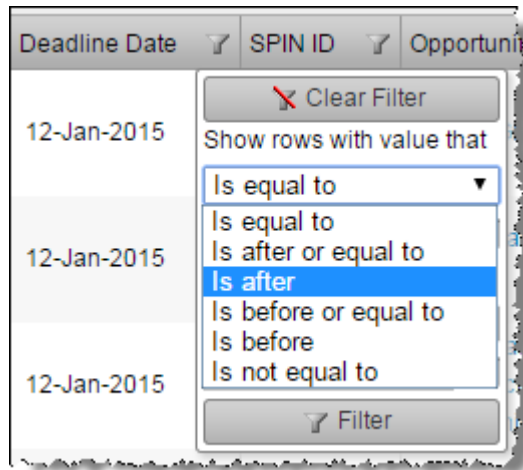
For Example

In this example, we are going to limit our results to a certain timeframe using the Next Deadline Date Column and the calendar function attached to its filter. Specifically, we are going to look for opportunities that have a deadline date between December 1st, 2014, and January 30th, 2015.

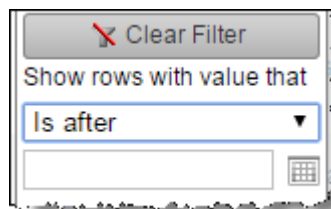
Step 3 Following the instructions provided above, access the filter function within the Next Deadline Date Column.



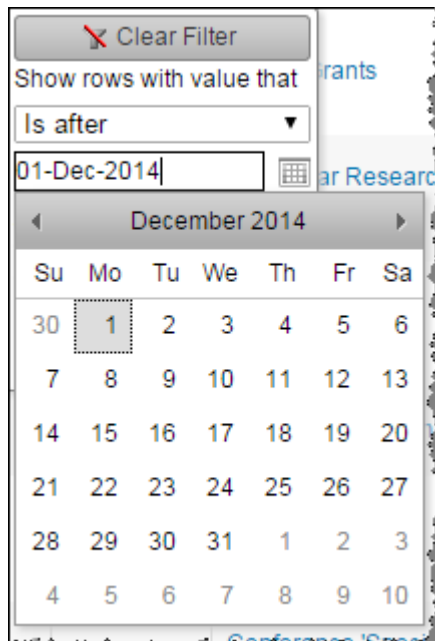
Step 4 Choose “Is after” from the filter options attached to the first field.



Step 5 Click on the calendar icon  to the right of the empty field.

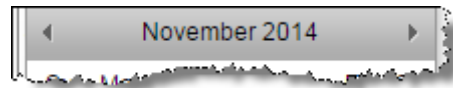


The calendar automatically defaults to the current date.



Since we want to include all dates between December 1st and January 30th, as the first step we need to direct SPIN to look for deadlines that are after November 30th.

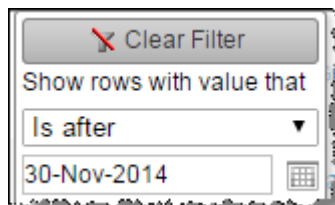
Step 6 Use the arrows at the top of the calendar to toggle through the months. In this case, we would use click on the left arrow to move back in time, until we reach November.



Step 7 Move your cursor over 30; it will turn grey, and the date will appear beneath it, as shown below.

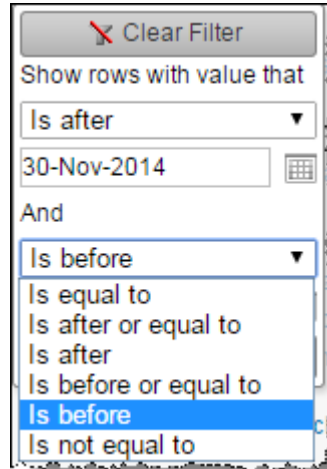


Step 8 Click on 30 to select the date. The date will be auto-filled with November 30th, 2014 into the previously empty field.



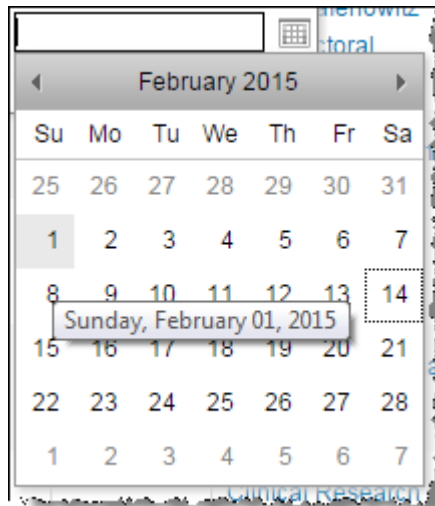
Now we are going to select our “end” criteria for the filter:

Step 1 Following the instructions provided at the beginning of this subsection, select “Is before” from the second pull-down menu.

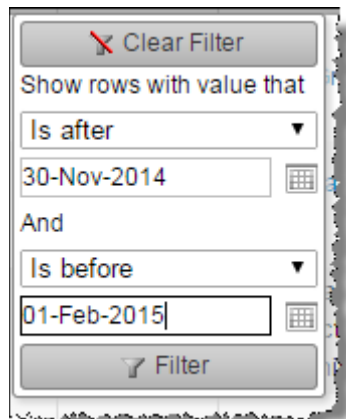


We are going to choose February 1st as the end date. This ensures that all opportunities with deadline dates up through January 31st will be included.

Step 2 Following the instructions provided for the first field in this example, choose February 1st.



Our completed filter now looks like this:



Step 3 Click the  button.

SPIN has narrowed down our original returned results to nine opportunities that have deadlines between December 1st, 2014 and January 31st, 2015, as shown below.

Results Found: 8 Reset Filters Export ▾

Group by: drag and drop a column header to this section

<input type="checkbox"/>	Sponsor Name	Deadline Date	SPIN ID	Opportunity Title	Sponsor Number	Funding Amount *	Bookmark
<input type="checkbox"/>	Amyotrophic Lateral Sclerosis Association	12-Jan-2015	01758	Starter Grants	None Posted	40,000.00 USD	+
<input type="checkbox"/>	Amyotrophic Lateral Sclerosis Association	12-Jan-2015	21240	Multi-Year Research Grants	None Posted	240,000.00 USD	+
<input type="checkbox"/>	Amyotrophic Lateral Sclerosis Association	12-Jan-2015	74532	Milton Safenowitz Post-Doctoral Fellowship Award	None Posted	100,000.00 USD	+
<input type="checkbox"/>	Fondation Thierry Latran	18-Dec-2014	07555	Research Program	None Posted	Not Specified	+
<input type="checkbox"/>	Muscular Dystrophy Association	15-Dec-2014	06454	Research Grant	None Posted	60,000.00 USD	+

SPIN users can add and clear multiple filters concurrently to narrow or expand their returned results.



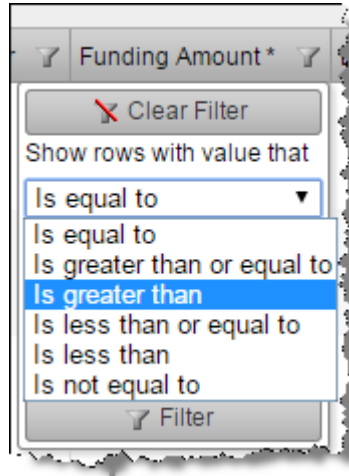
For Example

In our example, there were only eight returned results within the timeframe specified. But, imagining for a moment that there were hundreds of returned results, we can envision how useful adding another filter might be to further narrow the results. From the filtered results screen shown above, let's add another filter.

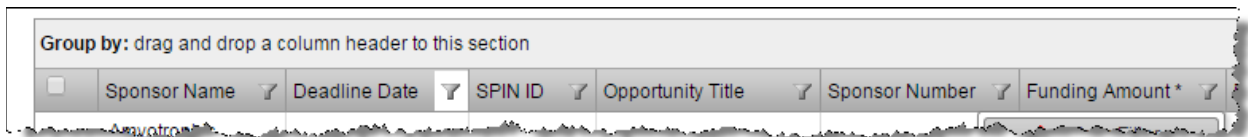
✓ .

Step 1 Click into the filter function within the Funding Amount Column.

Step 2 Using the previously provided instructions, choose “Is greater than” from the first field’s pull-down menu.

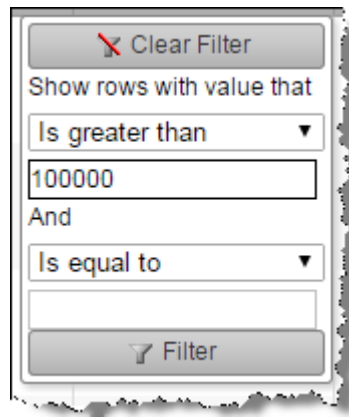


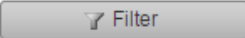
Note that the white-highlighted filter icon on the left belongs to the Next Deadline Date Column. *It is still highlighted because that filter is still in place as we add this new filter.*



We are going to look for opportunities with funding amounts of more than 100 thousand dollars.

Step 3 Click into the empty field below “Is greater than,” and type in 100,000.00. SPIN will automatically remove the comma; it is not necessary to use it if you prefer not to.



Step 4 Click the  button. SPIN applies another filter, as shown below.

Group by: drag and drop a column header to this section							
<input type="checkbox"/>	Sponsor Name	Deadline Date	SPIN ID	Opportunity Title	Sponsor Number	Funding Amount *	Bookmark
<input type="checkbox"/>	Amyotrophic Lateral Sclerosis Association	12-Jan-2015	21240	Multi-Year Research Grants	None Posted	240,000.00 USD	+
<input type="checkbox"/>	Muscular Dystrophy Association	15-Dec-2014	84672	Clinical Research Training Grant (CRTG)	None Posted	180,000.00 USD	+
<input type="checkbox"/>	National Institute on Aging/NIH/DHHS	29-Dec-2014	42049	RFA-AG-15-008-- Aging and Neuromuscular Junctions (R01)	RFA-AG-15-008	1,250,000.00 USD	+

1 10

Displaying items 1 - 3 of 3

We now have three returned results, as shown above. These opportunities both have deadlines between December 1st, 2014 and January 31st, 2015, and have funding amounts over \$100,000. Additionally, they adhere to all other criteria dictated by our original search (see Figure 44).

SPIN is built to be flexible. Users have the option of using a variety of combinations of filters and sorts to access opportunities that match their particular parameters. This becomes particularly useful when working with a high number of returned results.

Sorts and filters can be easily removed throughout the searching process. Additionally, any applied filters can be retained by saving the parameters attached to the returned results.

❖ See Section 5.1.5—Saving Search Parameters

9.6 Bookmarking Opportunities

From the **Returned Results Screen**, SPIN users can bookmark opportunities that are of particular interest in order to have quick access to them at a later time. Bookmarks are organized into groups using names that users create. Users can then add to existing groups of bookmarks to organize similar bookmarked opportunities.

Once the bookmarks are created, users can utilize the **Bookmarks Menu** during subsequent SPIN sessions to re-access the marked opportunities. This process is discussed in a different section of the manual.

❖ See Section 13—Bookmarks Menu




For Example

In this example, we are going to bookmark an HIV opportunity sponsored by Columbia University (2nd opportunity listed).

Results Found: 16 [Reset Filters](#) [Export](#)

Group by: drag and drop a column header to this section

<input type="checkbox"/>	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount*	Bookmark
<input type="checkbox"/>	77936	Fogarty International Center/Ellison Medical Foundation Overseas Fellowships in Global Health and Clinical Research (Temporarily Suspended)	Vanderbilt University School of Medicine		19-Nov-2010	25,000.00 USD	<input type="checkbox"/>
<input type="checkbox"/>	19236	Behavioral Sciences Research Training In HIV Infection	Columbia University		01-Dec-2013	Not Specified	<input type="checkbox"/>
<input type="checkbox"/>	12677	Internal Medicine - Gastroenterology Fellowship - Minnesota (Temporarily Suspended)	Mayo Clinic College of Medicine		27-Jul-2012	49,651.00 USD	<input type="checkbox"/>

Click on  within the row that contains the HIV opportunity. The popup depicted below appears.

Create new group

Select existing group

SPIN defaults to the “Create new group” selection, as shown above. Each time you open the bookmarking window it displays its last state and if this is not the first grouping for your current login session, it will suggest the last bookmark group name used (during this session)



Please Note

For maximum flexibility and functionality, there is nothing to preclude a user from bookmarking the same opportunity multiple times in the same group or other groups.

Also, please note that the menu does not automatically refresh after saving a bookmark. (See below for instructions on adding a bookmark to an existing Bookmark Group).




For Example

In this example we are going to create a Bookmark Group for HIV.

Step 1 Place your cursor into the empty field and type a name for your new group.

Step 2 Click the Save  button.


OR Click the Close  button to not bookmark the opportunity.

In this example, we clicked the Save  button.

Either way, the user will be returned back to the Returned Results. SPIN has created a new Bookmark Group with this name and this HIV Columbia University opportunity filed within it.

You can access this opportunity later by using the **Bookmark Menu**, as described in Section 13. If we access the Bookmark Feature again from any **Returned Results Screen**, from now on we would see our newly added group as an available option within the list of groups.

Now we are going to add the same opportunity to a previously existing group.

Step 1 Click on  within the row that contains the NIH opportunity. The popup depicted below appears.

Create new group

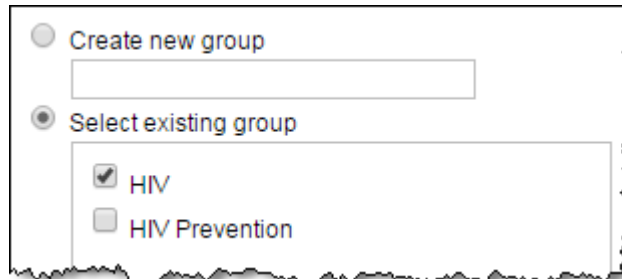
Select existing group

- HIV
- HIV Prevention

Save **Close**

SPIN recognizes that you have already bookmarked this opportunity, and also recognizes which group it has been filed under. This recognition is reflected in a different default than the last time we clicked the Bookmark Button.

As shown below, instead of defaulting to the “Create new group” selection, the following will appear.





If we want to change where this opportunity is filed, we have to de-select its current location, HIV, and choose another group. Alternately, we can file the opportunity in another Bookmark Group, without removing it from its original group.


For the sake of example, we are going to add it to the HIV Prevention Bookmark Group, while also keeping it within the HIV Group.

Step 2 Click in the checkbox to the left of the Wind selection.



Step 3 Click  to add this opportunity to the HIV Prevention Bookmark Group.

OR Click  to keep it only within the HIV Bookmark Group.

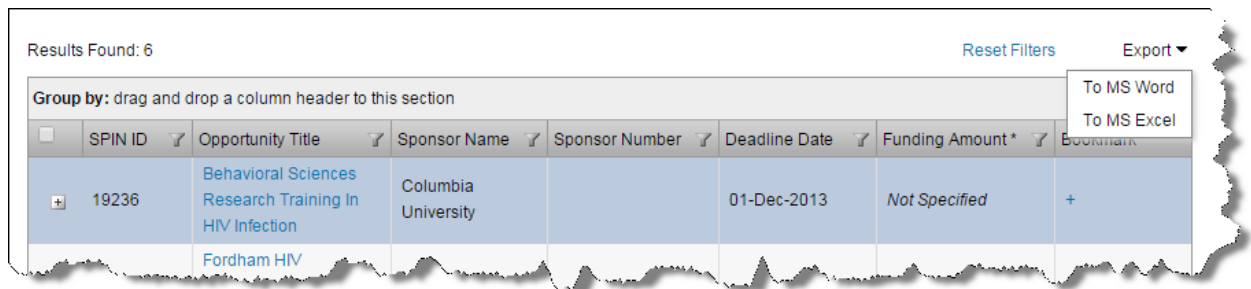
In this example, we clicked .

This HIV Columbia University opportunity has now been bookmarked into two different groups. We will re-access the opportunity within Section 13—Bookmarks Menu.

9.7 Exporting Results

As discussed in Using the Export Function subsection of Section 9.1.7—Opportunity Information Links, SPIN has an Export Function that allows users to easily transfer data from returned results to a Microsoft Word™ or Microsoft Excel™ file. Figure 48 within that section shows an example Excel file generated from the **Opportunity Information Window**.

Using the **Export Function** from the **Returned Results Screen** differs only slightly from the process outlined in Section 9.1.7. Specifically, the exported file generated from this screen reflects whatever manipulations the user has made by using sorts and filters, whereas the from the Opportunity Information Window, there is a default export format.



Results Found: 6 Reset Filters Export ▾

Group by: drag and drop a column header to this section

<input type="checkbox"/>	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount *	Bookmark
<input type="checkbox"/>	19236	Behavioral Sciences Research Training In HIV Infection	Columbia University		01-Dec-2013	Not Specified	+
<input type="checkbox"/>		Fordham HIV					

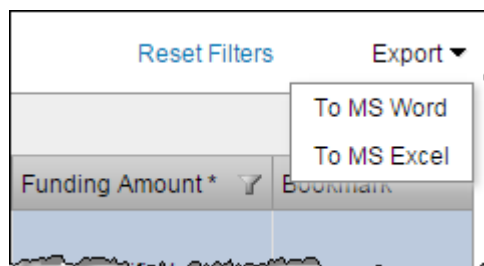
Export menu options: To MS Word, To MS Excel

However, if the user has not sorted or filtered returned results, the export will reflect that; it will include all the default columns in a baseline Returned Results Screen.

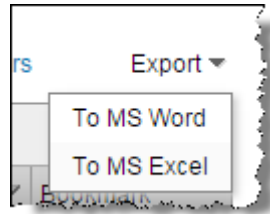


For Example *In this example, we are going to export our previous ALS search to an Excel file.*

Step 1 Click on the black arrow within the Export link in the upper, right-hand corner of the **Returned Results Screen**. The following will appear:

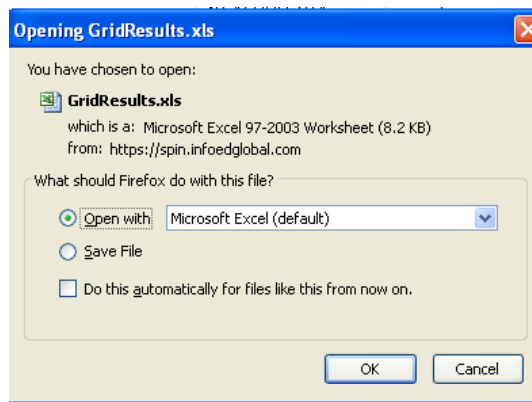


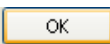
Step 2 Choose MS Word or MS Excel by hovering over your selection until it turns from white to light gray (shown below).



Step 3 Click on the desired option (MS Excel in this case).

Your computer's operating system will bring up a window asking you open or save the exported file, as shown below. You can open the file immediately, or save it to any location, and give it your own name.



Step 4 Make your selections and click  to complete the export.

If you choose to open the file, your computer's operating system will open Excel, and an automatically-generated grid will appear. If you choose to save the file first, you will be directed to choose a file location and name for the file on your local drive, and then you can access that file. Either way, the resulting file will look like the one depicted below.

- ❖ See the Using the Export Function subsection of Section 9.1.7—Opportunity Information Links, for a notation about the warning box associated with different versions of Word or Excel.

	A	B	C	D	E	F
1	Page 1					
2	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Next Deadline Date	Funding Amount *
3					Filter	Filter
4	13986	Research Grants RFA-ES-13-007--Research Linking Environmental Exposure to	Frick (Bruno and Ilse) Foundation for ALS Research		31-Aug-13	106,712.33 USD
5	34186	Neurodegenerative Disease (R21)	National Institute of Environmental Health Sciences/NIH/DHHS	RFA-ES-13-007	30-Sep-13	275,000.00 USD

Note how in this export Columns E and F are slightly different than Figure 48 within Section 9.1.7. Here we can see that our custom manipulations have been maintained during the transfer, and they are noted by the word “Filter” in the column headers.

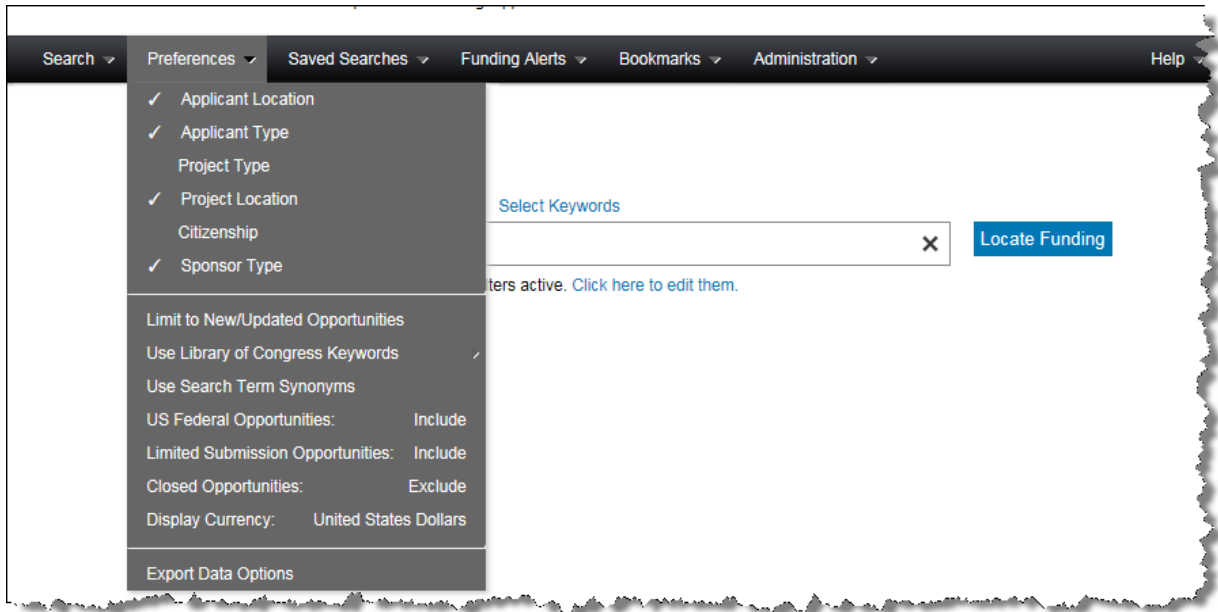
If you choose to export to Word, the information is put into a table format, as shown below. The filters would also be noted in the column titles of the Word table.

SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Next Deadline Date	Funding Amount
13986	Research Grants	Frick (Bruno and Ilse) Foundation for ALS Research		31-Aug-2013	106,712.33 USD
34186	RFA-ES-13-007--Research Linking Environmental Exposure to Neurodegenerative Disease (R21)	National Institute of Environmental Health Sciences/NIH/DHHS	RFA-ES-13-007	30-Sep-2013	275,000.00 USD

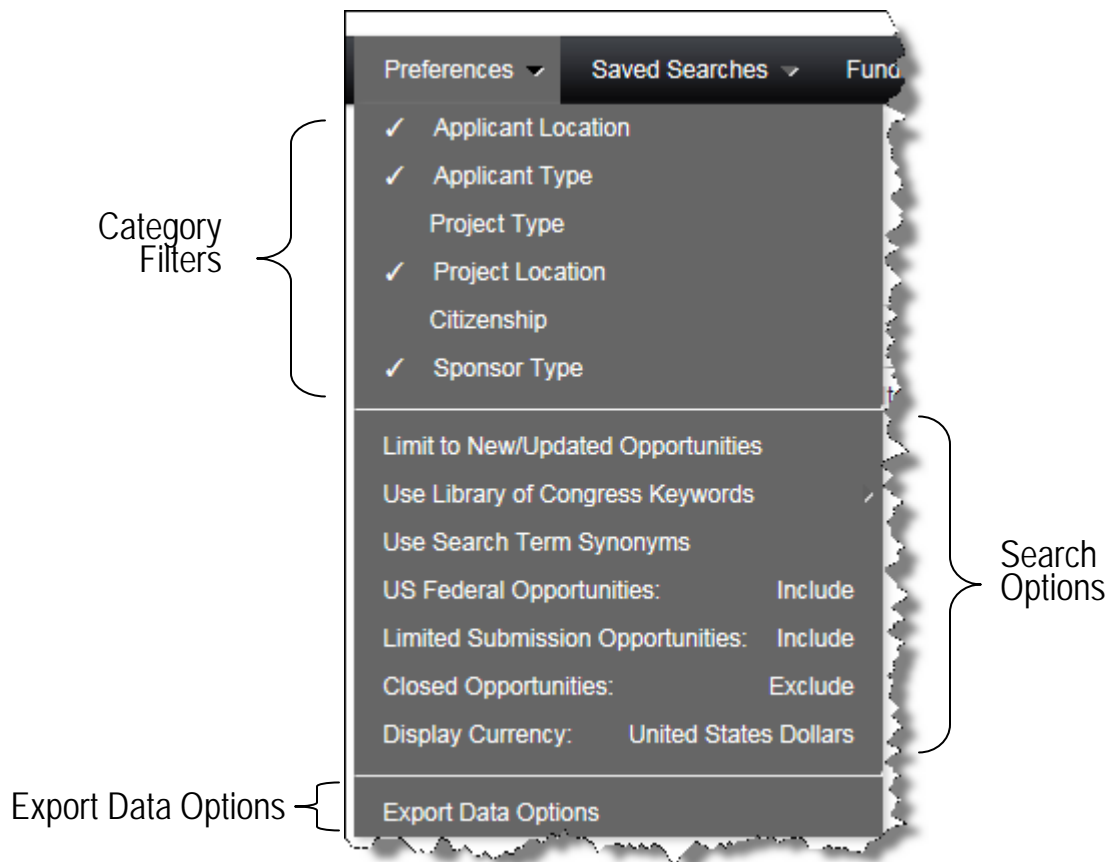
The opportunity links shown in both the Word and the Excel file formats are automatically enabled, and clicking on them will take you directly to the associated SPIN page. You can save and manipulate the files in any way you like.

10 Preferences Menu

With the basics of SPIN and the Search Menu addressed in the previous sections of this manual, this section and the menu items that follow it each correspond to the six remaining main menus on the SPIN Toolbar, as shown below.



The Preferences Menu is the second on SPIN's main toolbar. Preferences are used to set parameters for the type of opportunities the user will find relevant.



As you can see, this menu has been separated into three main sections:

1. Category Filters – top portion of list
2. Search Options – middle portion of list
3. Export Data Options – bottom portion of list

10.1 Category Filters

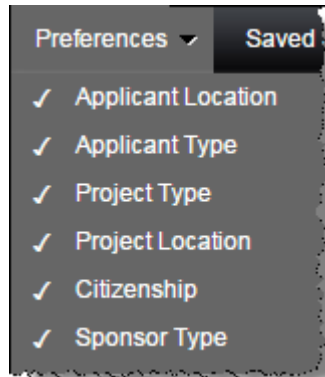
Preferences that logged-in users select from this menu will apply to every SPIN search that they conduct until the user changes their settings or loads a saved search that had different filters saved. At that point the newest set of filters will continue to apply moving forward.

However the filters are configured when they close their session is how they will reapplied at the start of their next session. This is different from the sorting and filtering features discussed in previous sections.

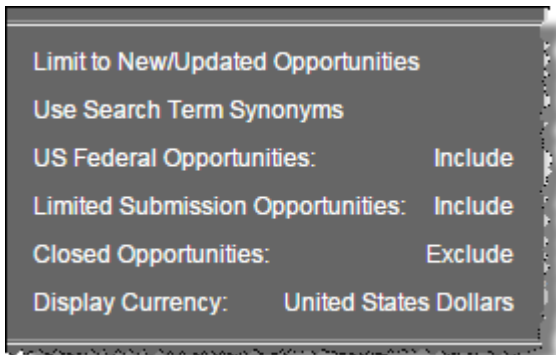
Those features are applied to returned results that *have already been affected by the user's existing Category Filters* as designated on the following six Category Filter Tabs:

- Applicant Location - This will ensure that you only receive opportunities available to applicants based in your location. If nothing is selected, the system will not filter on this field.
- Applicant Type - This is used to determine which attribute(s) the sponsor will require of an applicant. There are descriptors for both individuals and organizations.
- Project Type - This is used to determine what types of projects the sponsor is looking to fund, or what type of work the sponsor is intending be done by successful applicants
- Project Location -This is used to determine where the sponsor will allow the work to be carried out. You should select all locations that you are willing to travel to in carrying out an award.
- Citizenship - This is used to determine if the sponsor maintains specific citizenship status requirements for their opportunities. Select those that apply to you.
- Sponsor Type – This is used to filter the retrieved opportunities by a selected type of sponsor (i.e. US Federal, Charity, Research Council etc.).

The top half of the Preferences Menu contains six SPIN Category Filters, as illustrated and listed below:

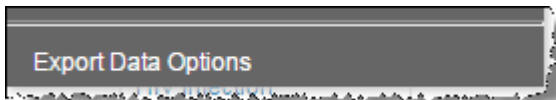


The middle portion of the Preference Menu contains a series of SPIN Search Options, as illustrated and listed below:



The bottom of the Preference Menu contains the Export Data Options which is used to determine which columns, and in what order, will appear in the detail view. If the Administrator has set defaults, then that is what the user will see unless they configure and save their own settings.

The Preference Menu, Export Data Options menu item is illustrated below:



10.1.1 Navigating within the Preferences Popup

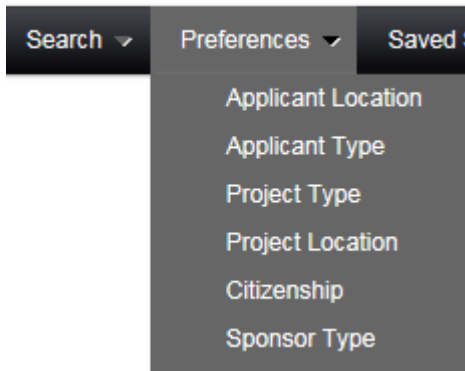
Although there are six variations of the SPIN Category Filters Popup (see Figure 54), each one shares common features that users will have access to no matter which menu option they are working within.



For Example *In this example, we are just going to look at some of the basic navigation features common to all six options.*

Step 1 Hover your cursor over Preferences on the SPIN Toolbar.

Six menu options will appear beneath the header, as shown below:



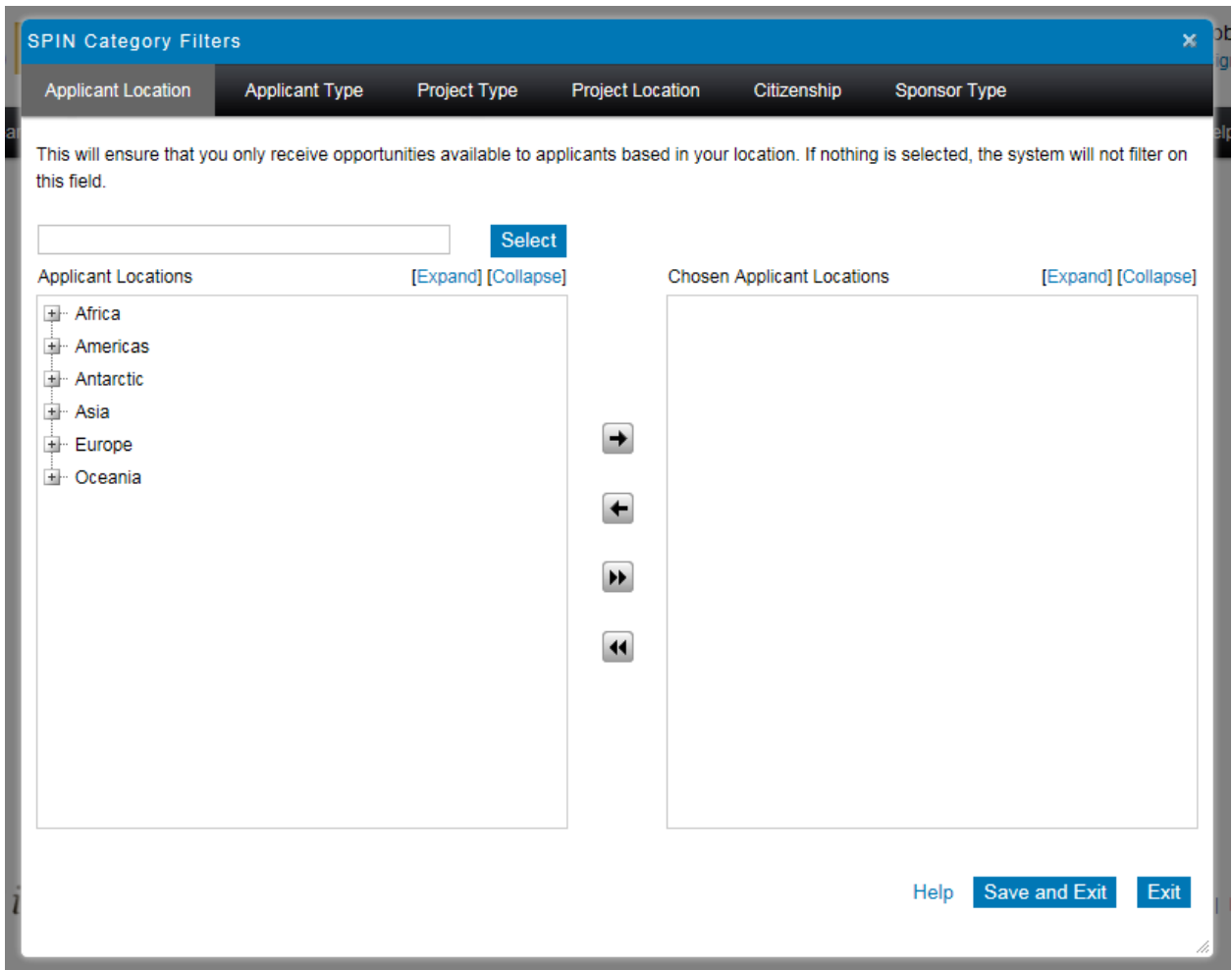
Choosing any one of the six options results in the **SPIN Category Filters Popup** appearing.

Figure 54 shows just one of the six versions of the popup. The functional differences among the five tabs are depicted and discussed in each of the five corresponding subsections that follow.

The menu option that you choose will result in the corresponding tab being shown in white, and different options than those shown below.

- ✓ In this example, we chose Applicant Location from the drop down menu, so that tab appears white within the popup, and the functions attached to that option are shown.

Figure 54 *Category Filters Popup—Applicant Location Tab*



Within every variation of the Category Filters Popup, there are two sides which are commonly referred to as datawindows or tables. Users can choose options from the Available Options Table on the left and “move” them to the Chosen Options Table on the right, to direct SPIN to include those criteria in all searches. The names of the two tables vary slightly within each menu option.






Similarly, users may choose options they previously put into the Chosen Options Table on the right and “move” them back to the Available Options Table on the left to exclude those criteria.






Options can be moved by:

- Clicking on criteria and using the arrow buttons to move them;
- Double-clicking selections to automatically move them to the opposite column; or,
- Dragging and dropping selections to the opposite column.

The functions that are common to every variation of the Category Filters Popup are described in the table below.

Visual depictions and step by step instructions associated with each of these functions will be provided in the next five subsections.

	<p>Users enter their desired criteria into the blank search field and click Select.</p> <p>For example, in the Applicant Location Category Filter, typing “California” into the blank field, would result in the Chose Application Location autofilling with California as a criteria.</p>
	<p>The Expand All Button causes all arrows within the tables to point downward, revealing all the categories and subcategories beneath the main options.</p> <p>For example, clicking this button in the Project Type Options Table would result in many specific types of Project Resources to appear beneath the heading.</p>
	<p>The Collapse All Button causes all the arrows within the tables to retract and all subheadings and subcategories to be hidden.</p>
	<p>The Move Right Button causes highlighted selections within the Available Options Table to be moved to the right, into the Chosen Options Table.</p>
	<p>The Move Left Button causes highlighted selections within the Chosen Options Table to be moved to the left into the Available Options Table.</p>

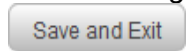
	The Move Group Right Button causes the entire content of the Available Options Table to be moved to the right into the Chosen Options Table.
	The Move Group Left Button causes the entire content of the Chosen Options Table to be moved to the left, into the Available Options Table.
	The Save and Exit Button must be clicked in order to save users' selections within any of the five variations of the Category Filters Popup. After the button is clicked, users are taken back to the SPIN Home Screen.
	The Exit Button allows users to return to the SPIN Home Screen without retaining any of the selections they made while working in the popup.
	The Help link causes the Category Filters Information Box to popup. The popup provides basic information about how the Category Filters work.



Please Note

Users may click among the six Category Filter Tabs within the popup without directing SPIN to save their selections. Those selections are retained.

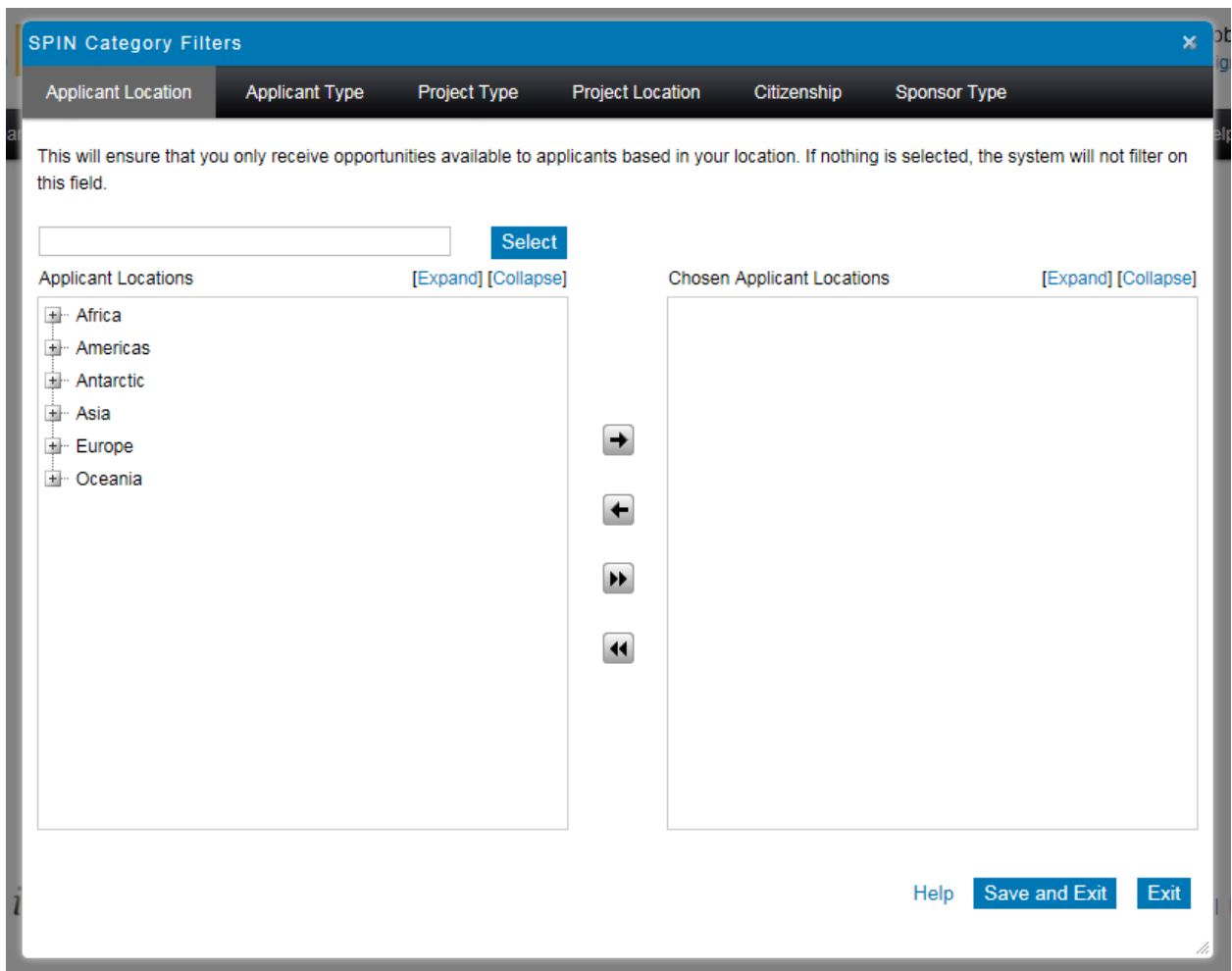
However, when users want to leave the SPIN Category Filters Popup Window altogether, in order to retain their filters, they must click



10.1.2 Applicant Location

Application Location is the first of the six Category Filters. It allows users to ensure that returned results from SPIN will only contain opportunities that are available to applicants located in their institution's location. SPIN's location options are based upon United Nations and International Organization for Standardization data. If nothing is selected, SPIN will not filter these characteristics.

Figure 55 *Applicant Location Category Filter*



- ❖ See Section 10.1.1—Navigating within the Category Filters Popup for instructions on how to access the Application Location Category Filter.
- ❖ See Figure 54 for a depiction of the Applicant Location Category Filter function.



Quick Tip

Users should endeavor to choose the most relevant location possible. For example, if your institution is based in New York, it would be preferable to choose “New York” rather than “United States.”



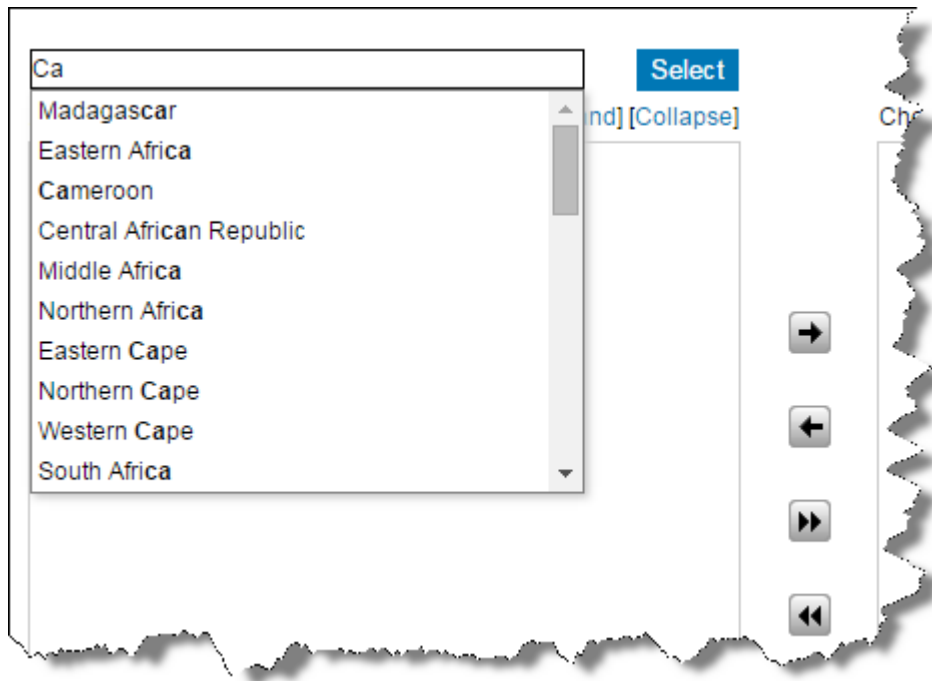
For Example

In this example, we are going to set our Applicant Location Category Filter to both California and Massachusetts, since our institution has two main offices—one in San Francisco, and one in Boston.

To show how users can select locations using the different functions within SPIN, we are going to use *two different methods* for selecting a location.

Let’s choose California first by utilizing the blank search field.

Step 1 From within the SPIN Category Filters Popup (as shown in Figure 54) place your cursor in the blank search field. Begin typing the word California.



As you type the first few letters, a menu will pop up showing available options, as shown above. The available options will decrease as you add more letters to your search term.

Step 2 Select your option from the menu that appeared.

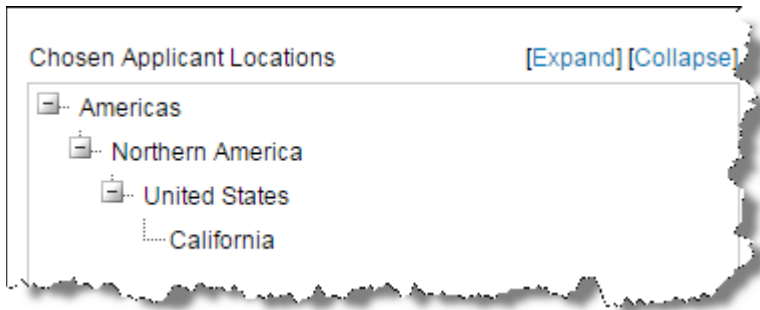


OR Continue to type your desired Applicant Location.



Step 3 Click .

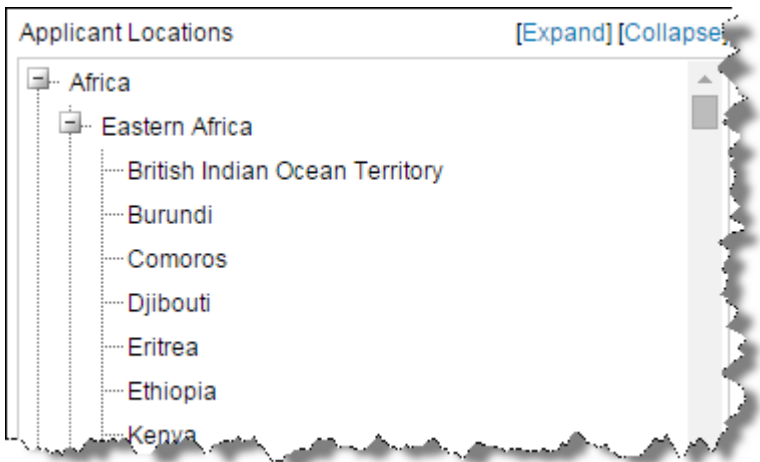
The Chosen Applicant Locations Table on the right side of the popup will autofill with the California criteria, as shown below.



Now we are going to add Massachusetts to our Applicant Location Category Filters by using a different method.

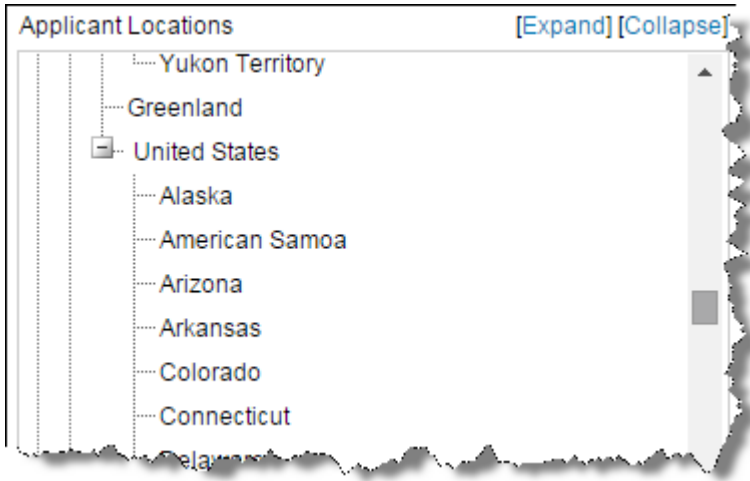
Step 4 Click on [\[Expand\]](#).

All of the arrows within the Applicant Location Table on the left-hand side of the popup will move downward, revealing many locations, as partially shown below.

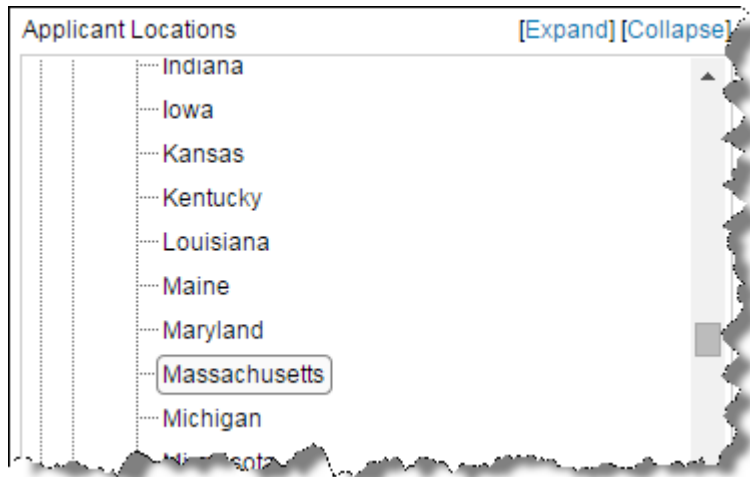


The locations are organized by continents (with islands in proximity to), then portions of continents (for example Eastern Africa), then countries, then states or provinces, where applicable.

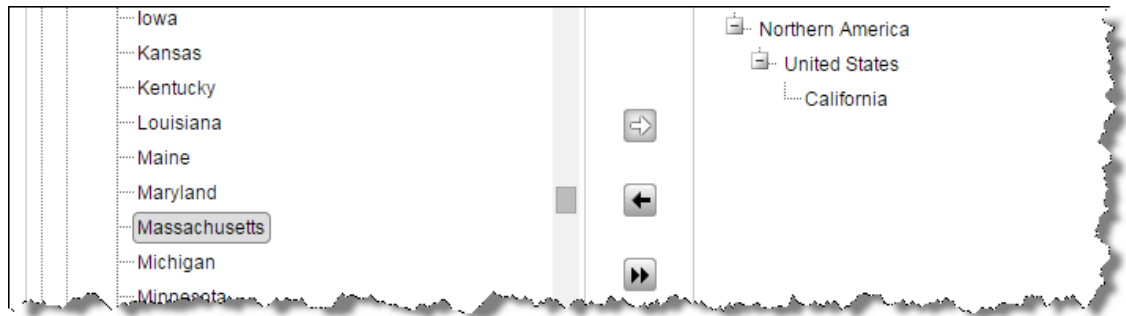
Step 5 Use the gray scroll bar on the right-hand side of the Applicant Locations Table to scroll down and find your selected location.




Step 6 Click once directly onto Massachusetts. The word will turn light gray as shown below.





Step 7 Click  to move your selected location into the Chosen Applicant Locations Table.



OR Double click directly onto Massachusetts. The location will be moved to the right-hand table, as shown above.

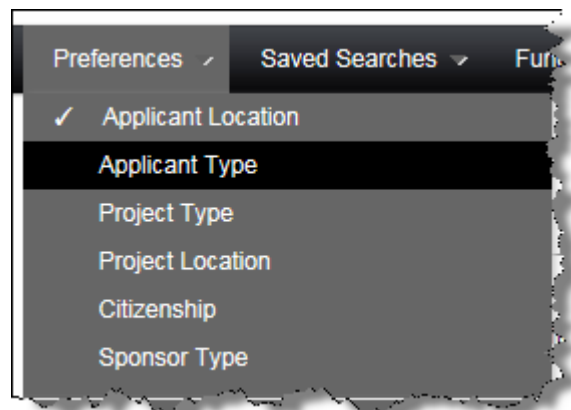
Step 8 Click  button to save your filters and close the popup window.

OR Click  button to close the popup window without saving.

To remove locations from the Chosen Applicant Locations Table, either double click on the location, or highlight it, and click the Back  Button. Clicking  moves every available location from the Applicant Locations Table to the Chosen Applicant Locations Table.

10.1.3 Applicant Type

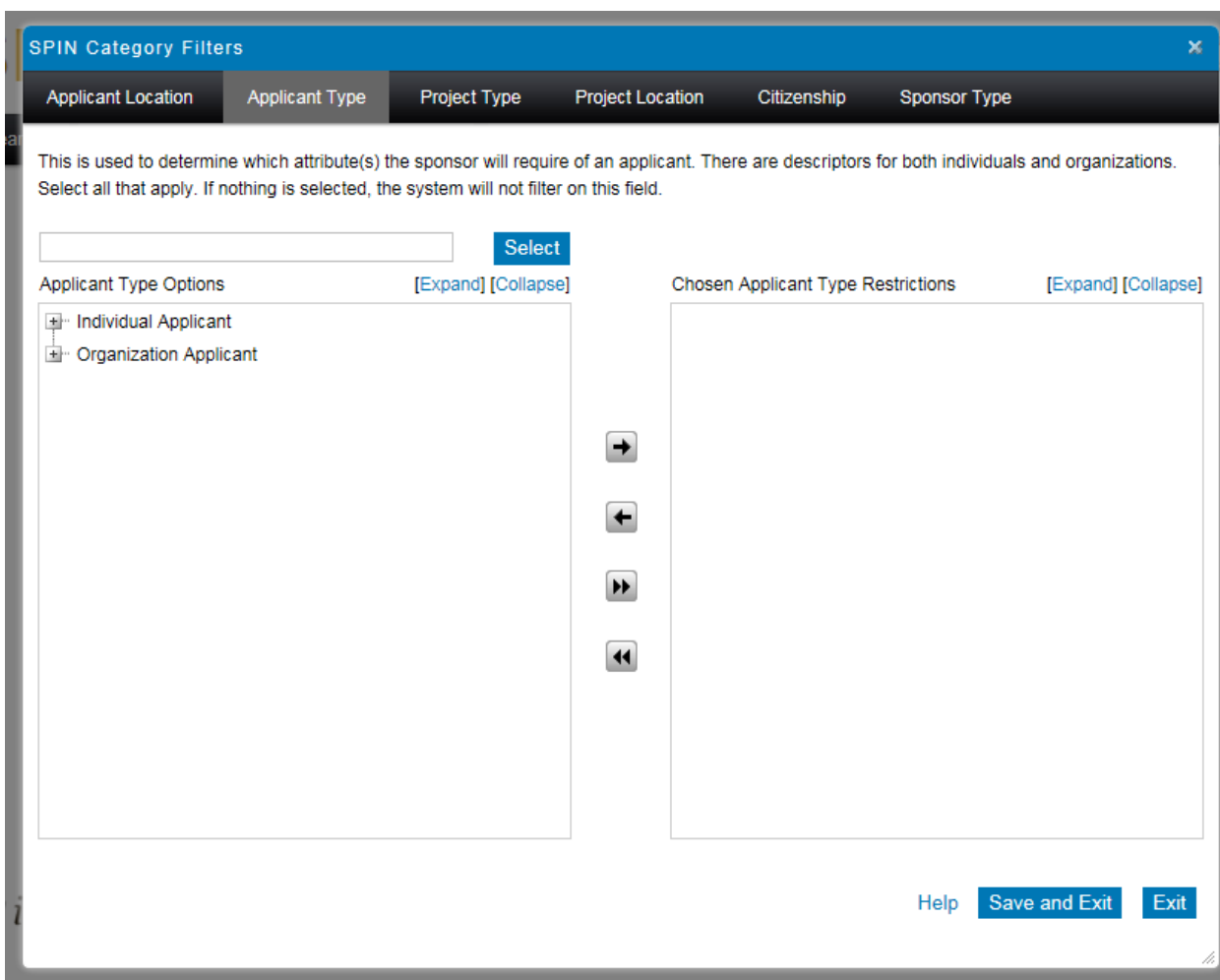
Applicant Type is the second of the six Category Filters. It is depicted in Figure 56 below. It allows users to ensure that returned results from SPIN will only contain opportunities that are appropriate for their institution and/or its staff. If nothing is selected, SPIN will not filter these characteristics.



- ❖ See Section 10.1.1—Navigating within the Category Filters Popup for instructions on how to access the Applicant Type Category Filter.

Figure 56

Category Filters Popup—Applicant Type Tab



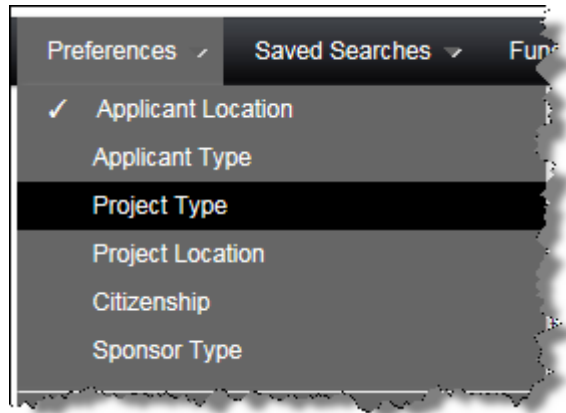
This screen functions the same way as the Applicant Location Tab.

- ❖ See Section 10.1.2—Applicant Location for instructions on how to make and save selections within this tab.

Applicant Types are divided into Individual and Organizational applicants. Individual Applicants refer to the types of people who work or study within an institution (for example, doctoral students and senior faculty). Organizational Applicants refer to characteristics of the institution as a whole (for example, non-profit vs. profit, or academic vs. professional).

10.1.4 Project Type

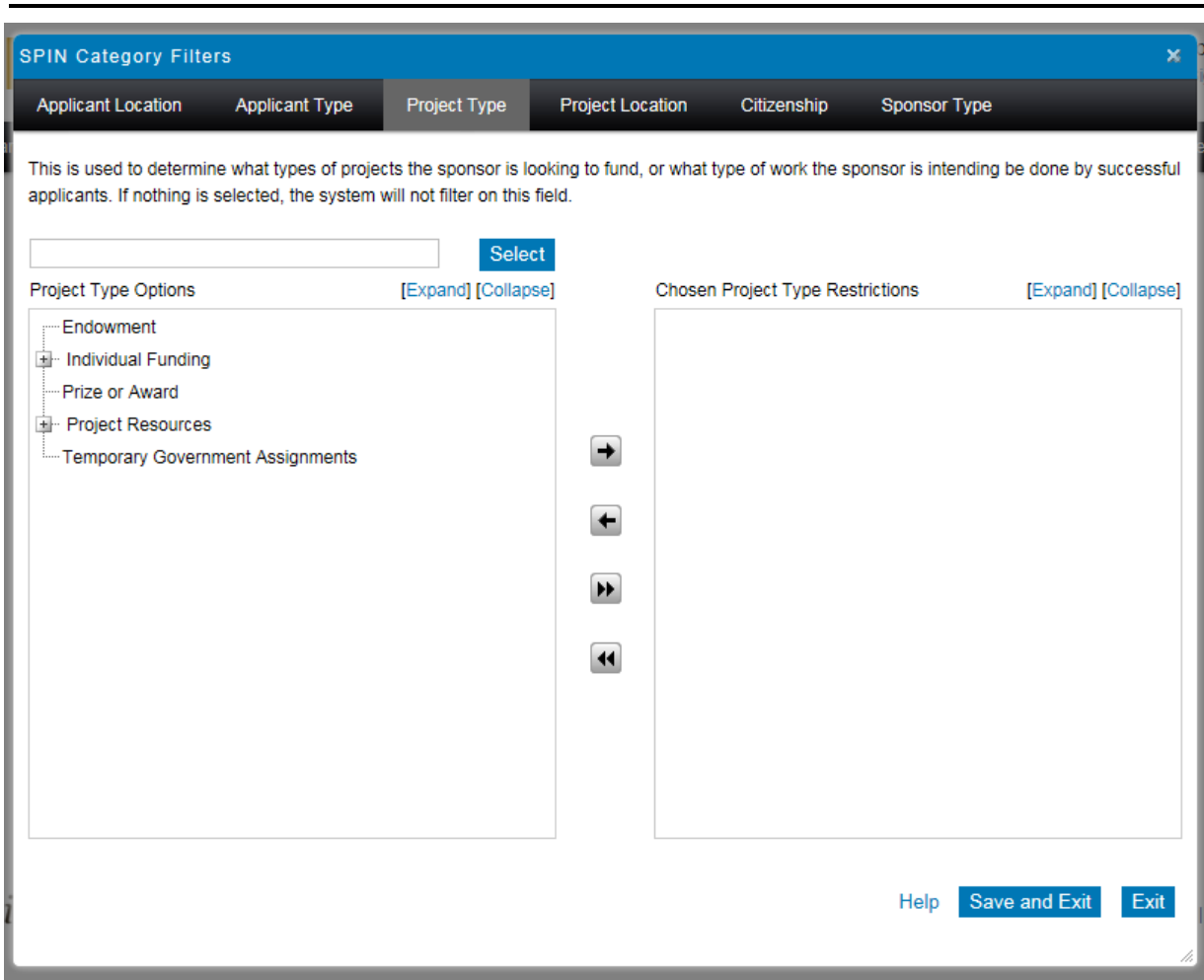
Project Type is the third of the six Category Filters. It is depicted in Figure 57 below. It allows users to ensure that returned results from SPIN will only contain opportunities that are based on a certain funding type. If nothing is selected, SPIN will not filter these characteristics.



- ❖ See Section 10.1.1—Navigating within the Category Filters Popup for instructions on how to access the Project Type Category Filter.

Figure 57

Category Filters Popup—Project Type Tab



This screen functions the same way as the Applicant Location Tab.

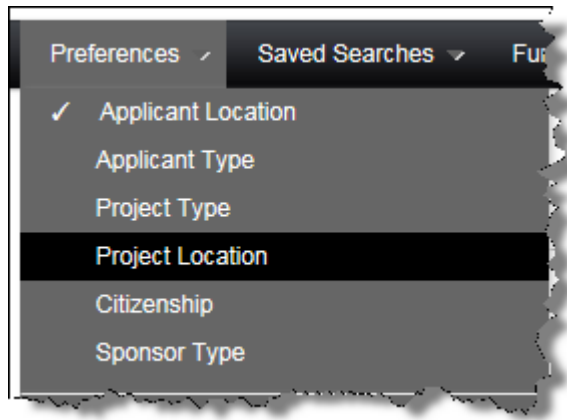
- ❖ See Section 10.1.2—Applicant Location for instructions on how to make and save selections within this tab.

Project Types are divided into five categories, as shown in the figure above: Endowment; Individual Funding; Prize or Award; Project Resources; and, Temporary Government Assignments.

The Individual Funding and Project Resources Categories have subcategories that are accessible by clicking the arrows to the left of their names to reveal all options.

10.1.5 Project Location

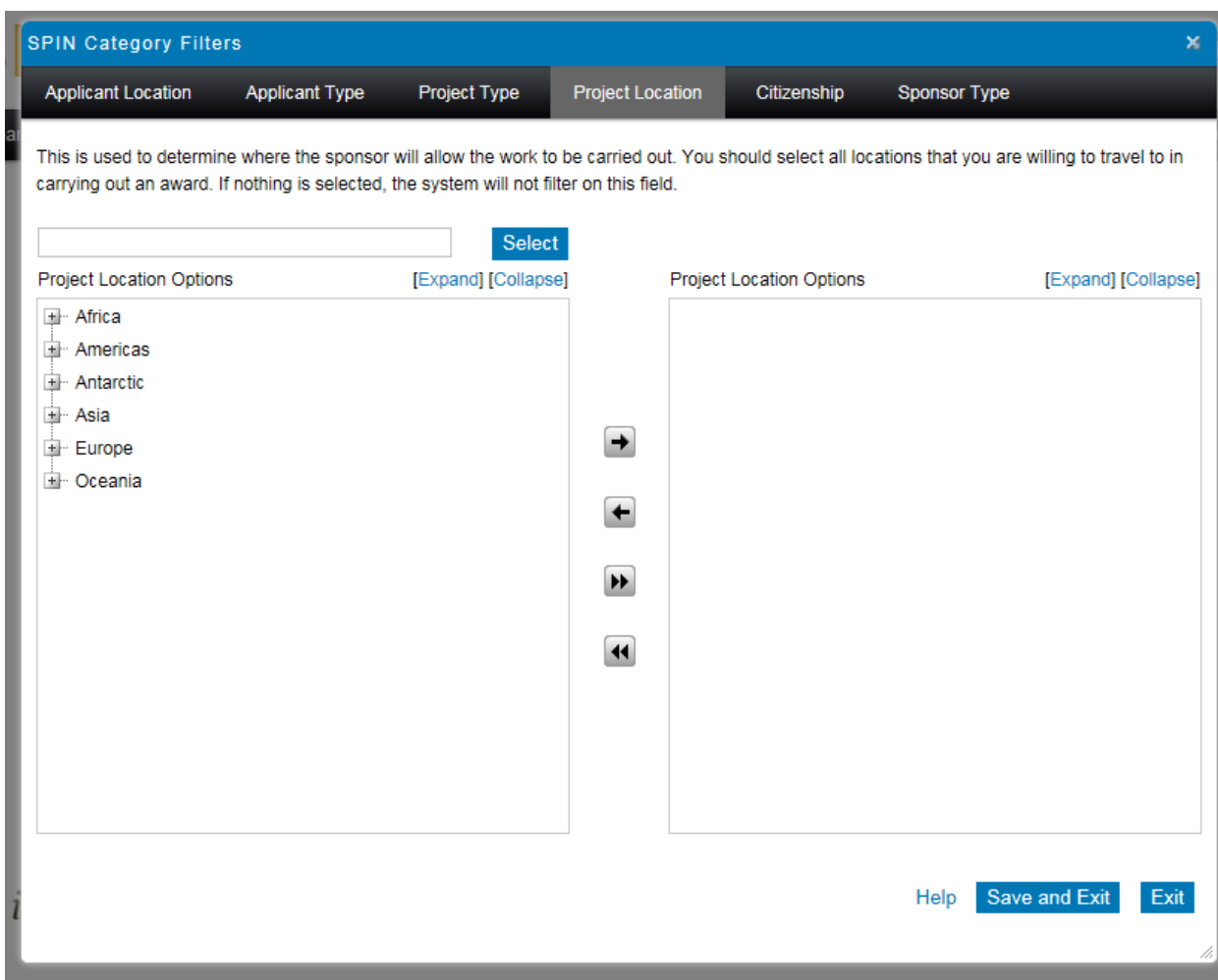
Project Location is the fourth of the six Category Filters. It is depicted in Figure 58 below. It allows users to ensure that returned results from SPIN will only contain opportunities where the required work will be conducted in areas where your institution can function. If nothing is selected, SPIN will not filter these characteristics. Users should select all the locations where they are willing and able to perform work.



- ❖ See Section 10.1.1—Navigating within the Category Filters Popup for instructions on how to access the Project Location Category Filter.

Figure 58

Category Filters Popup—Project Location Tab



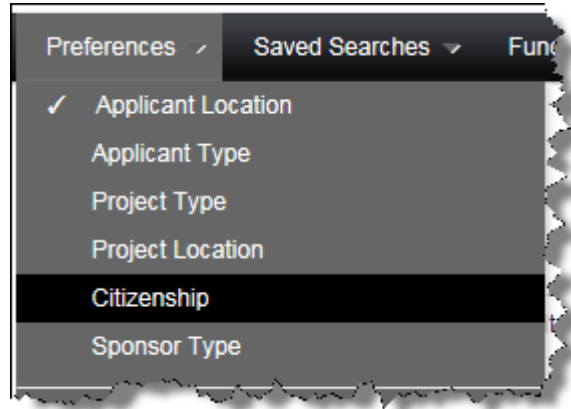
This screen functions the same way as the Applicant Location Tab.

- ❖ See Section 10.1.2—Applicant Location for instructions on how to make and save selections within this tab.

Project Locations are arranged and presented in the exact same way as the Applicant Locations.

10.1.6 Citizenship

Citizenship is the fifth of the six Category Filters. It is depicted in Figure 59 below. It allows users to select the citizenship status that is relevant to them to ensure that returned results from SPIN will only contain opportunities that the Sponsor deems them qualified for.

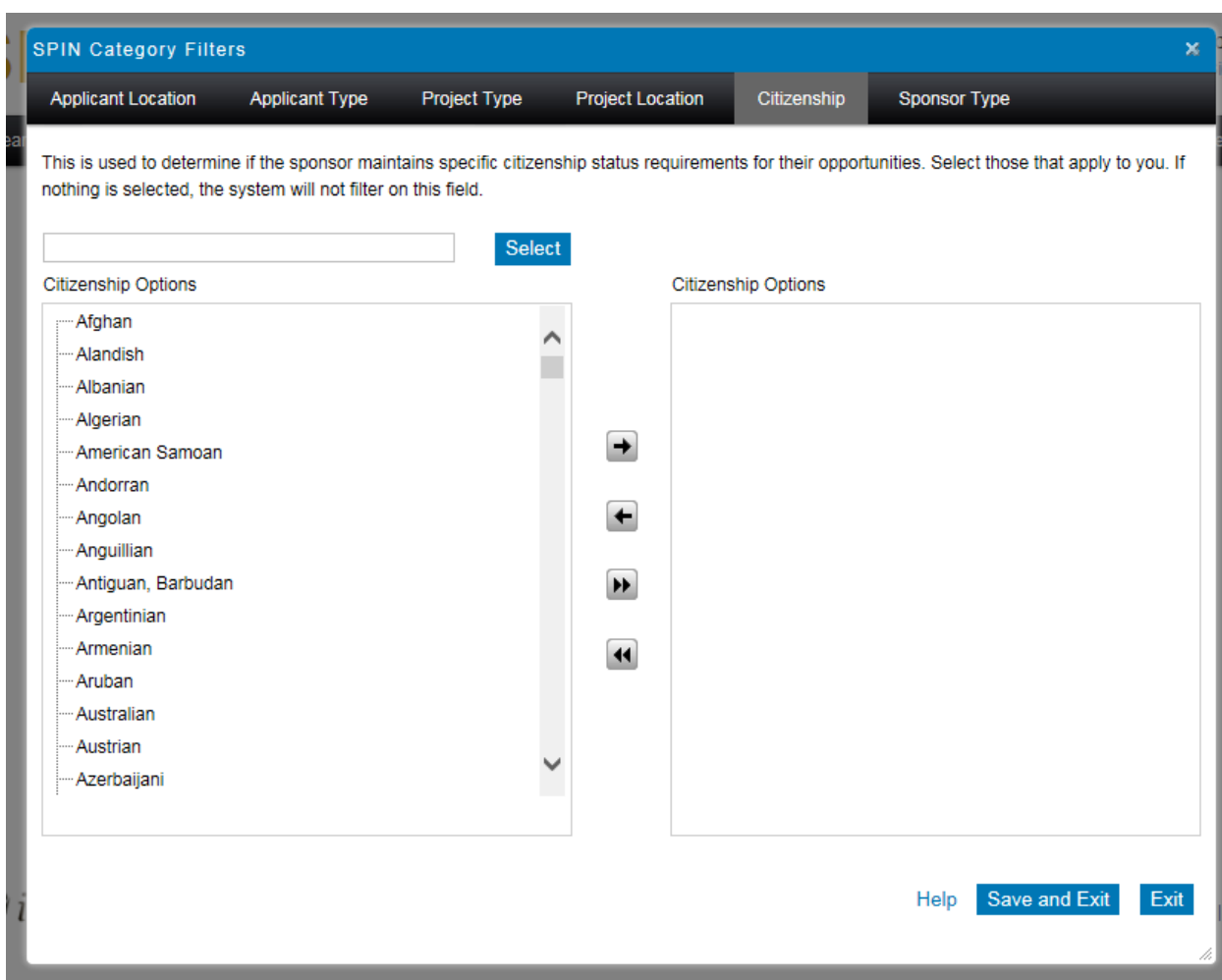


For example, if SPIN contains opportunities Sponsored by a United States agency that has deemed the funds can only be used by US Citizens, it would be useless for the user to pursue the opportunity if he or she is a citizen of the United Kingdom. This filter would allow that user to circumvent receiving any opportunities beyond their citizenship status. If nothing is selected, SPIN will not filter these characteristics.

- ❖ See Section 10.1.1—Navigating within the Category Filters Popup for instructions on how to access the Citizenship Category Filter.

Figure 59

Category Filters Popup—Citizenship Tab



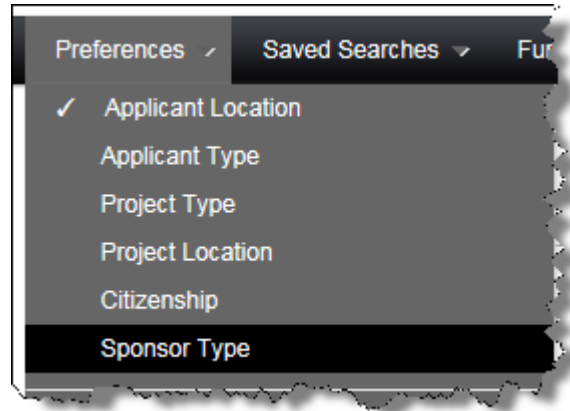
This screen functions the same way as the Applicant Location Tab.

- ❖ See Section 10.1.2—Applicant Location for instructions on how to make and save selections within this tab.

The Citizenship Options Table contains an extensive list of options, organized alphabetically by nation and/or territory. Users can select one or more options by following the instructions outlined in Section 5.4.2.

10.1.7 Sponsor Type

Sponsor Type is the last of the six Category Filters. It is depicted in Figure 60 below. It allows users to select a sponsor type that is relevant to them to ensure that returned results from SPIN will only contain opportunities from a certain Sponsor Type(s).

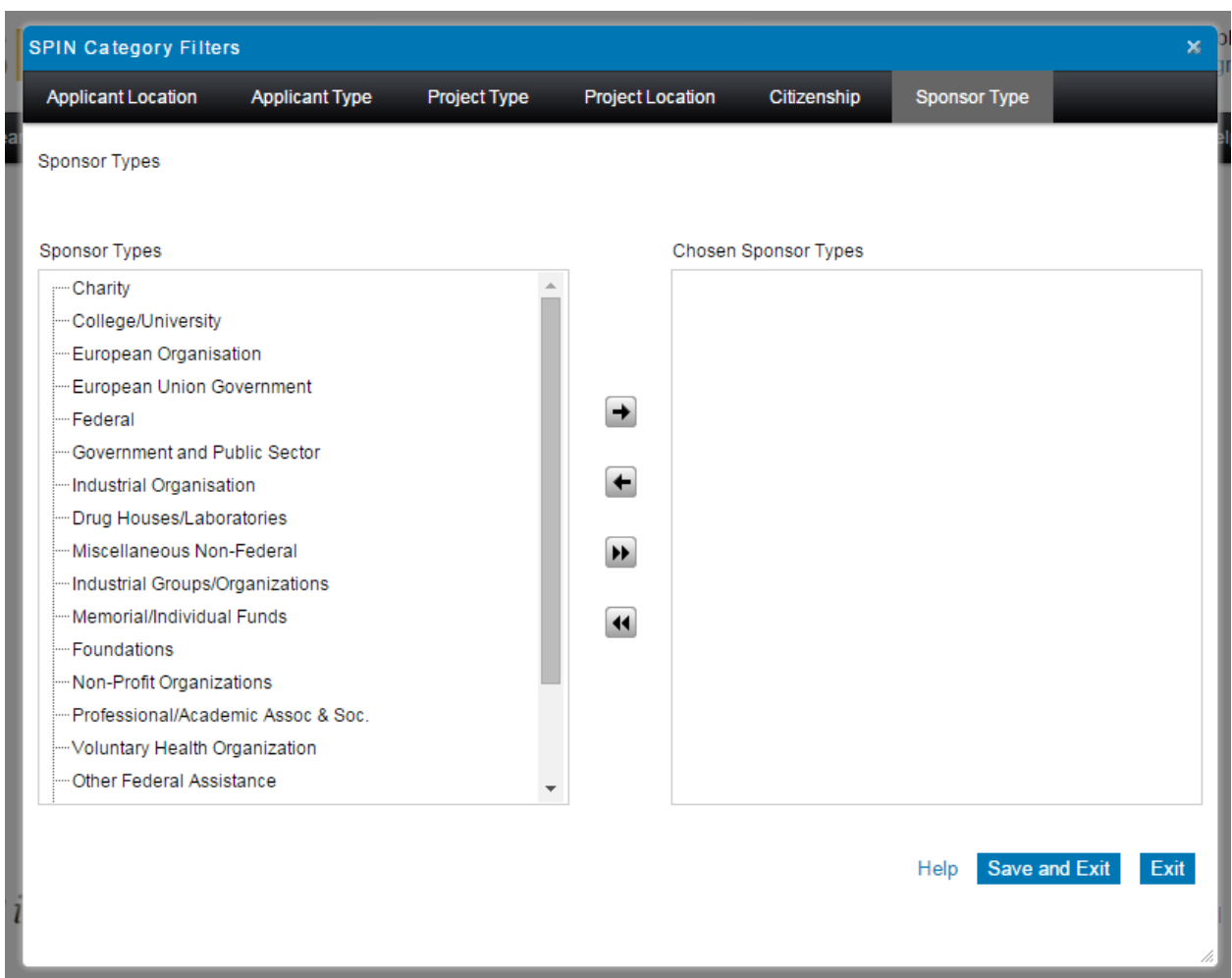


For example, some institutions may only be interested in/allowed to receive funding from US Federal Sponsors. In that case, the user may use this Category Filter to only include 'US Federal' sponsor type. This filter would allow that user to circumvent receiving any opportunities beyond their relevant sponsor type(s). If nothing is selected, SPIN will not filter these characteristics.

- ❖ See Section 10.1.1—Navigating within the Category Filters Popup for instructions on how to access the Sponsor Type Category Filter.

Figure 60

Category Filters Popup—Sponsor Type Tab



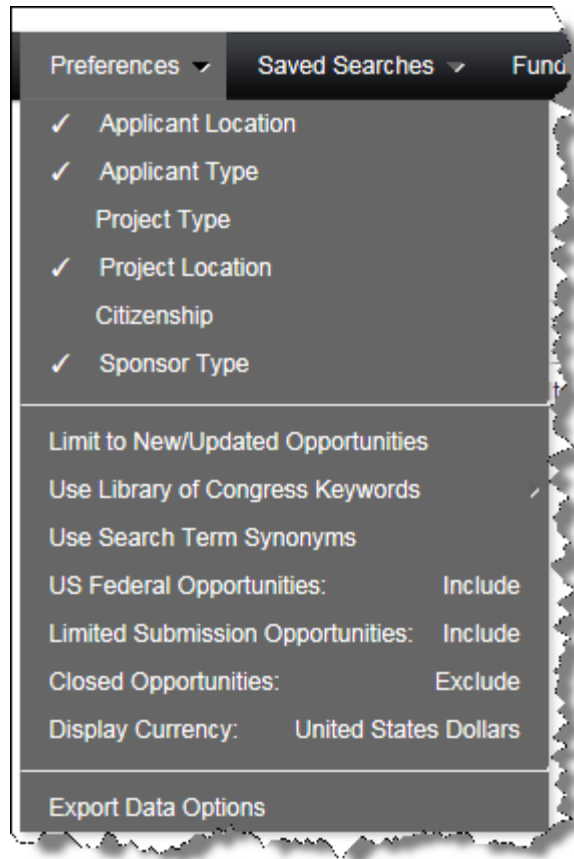
This screen functions the same way as the Applicant Location Tab.

- ❖ See Section 10.1.2—Applicant Location for instructions on how to make and save selections within this tab.

The Sponsor Type Table contains an extensive list of sponsor type options. Users can select one or more options by following the instructions outlined in Section 5.4.2.

10.2 SPIN Preference Menu Search Options

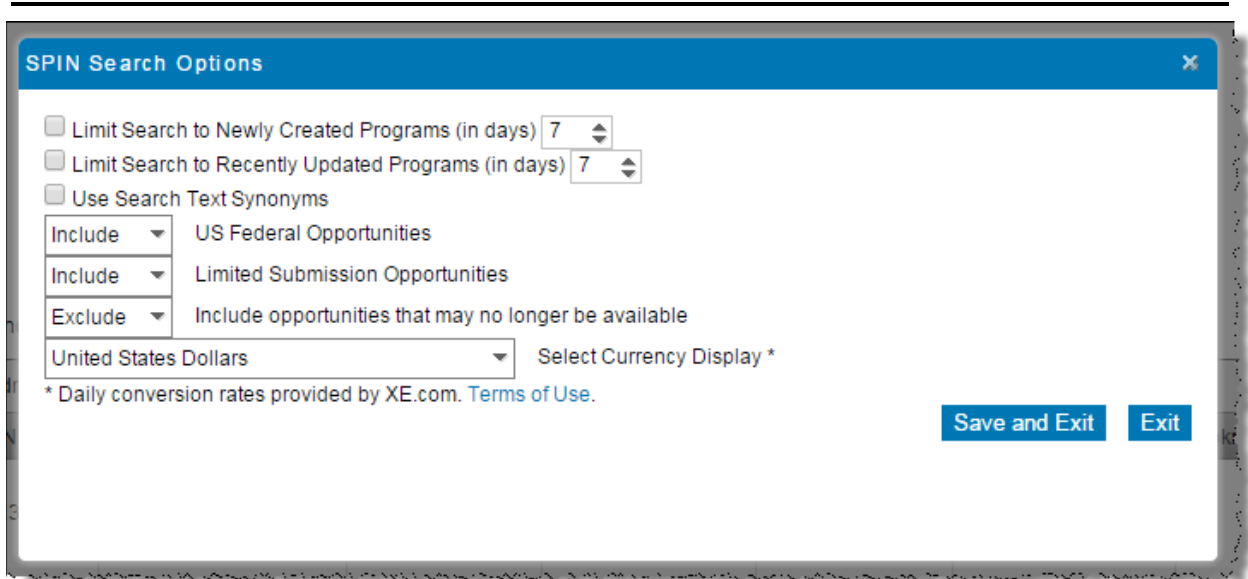
The middle portion of the Preference Menu is comprised of a series of six Search Option pop-ups and displays.



When any of these six menu items are selected, the SPIN Search Options Popup will open and your designations for each options may be selected.

Figure 61

SPIN Search Options Popup



The popup shows some default settings. Specifically, SPIN defaults to a 7-day span for new or updated programs, as well as to US dollars as the currency of choice. Users can alter these as they work within this window. *Remember, selections made within this window will apply to all subsequent SPIN searches.* Users can create custom searches at any time by changing the options of particular searches *after results have been returned*, or by avoiding setting too many defaults within this window.

- ❖ See Section 11.1—Saved Searches for more information on altering Search Options after the default options have been applied.

The six Preference Menu search options are:

- Limit to New/Updated Opportunities – User can select to limit their search to include newly created and/or recently updated programs of a variable and selectable duration of days.
- Use Search Term Synonyms - User can select whether they would like to use Search Text Synonyms or not in their searches by checking/unchecking the Use Search Text Synonyms box. This option expands each search term via an integrated thesaurus in the database. Use this tool to increase the number of returned results, without having to type in additional search terms. For example, a search for "cancer" will also search for tumors, carcinoma, sarcoma, malignancy, etc.
- US Federal Opportunities – User can select to include, exclude or only search for US Federal Opportunities for their searches using the included drop-down value list.
- Limit Submission Opportunities - User can select to include, exclude or only search for Limit Submission Opportunities for their searches using the included drop-down value list.

- Closed Opportunities – User can select to include, exclude or only search for opportunities that are no longer available for submission (closed) for their searches using the included drop-down value list.
- Display Currency – User can designate what Currency type to use when displaying the funding levels of the opportunities retrieved in your searches.

10.2.1 Limit to New/Updated Opportunities

Selecting the Limit Search to Newly Created Programs search option will cause SPIN to only return opportunities that were created a specific number of days ago. The system defaults to those created within seven previous days, but users may adjust the number of days from one day to one year. Use the arrows to the right of the number of days to adjust the creation time.



Please Note

If you check Limit Search to Newly Created Programs, the Limit Search to Recent Programs Option will become unavailable.

Selecting the Limit Search to Newly Created Programs search option will cause SPIN to only return opportunities that were created a specific number of days ago. The system defaults to those created within seven previous days, but users may adjust the number of days from one day to one year. Use the arrows to the right of the number of days to adjust the creation time.



Please Note

If you check Limit Search to Newly Created Programs, the Limit Search to Recent Programs Option will become unavailable.

To limit the opportunities to be retrieved in their searches to newly created or updated opportunities a user would follow the following steps:

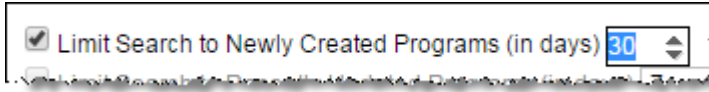
Step 1 Go to the Preferences Menu and click on the Limit to New/Updated Opportunities

Limit to New/Updated Opportunities

Step 2 The SPIN Search Options Popup will appear and the first two checkboxes and day counters will help them designate their preferences.

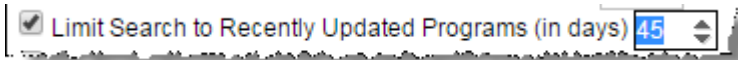


Step 3 The user can select whether to limit their search to newly created programs from 0 to 365 days using the designated checkbox and day counter mechanisms.



OR

Step 4 The user can select whether to limit their search to recently updated programs from 0 to 365 days using the designated checkbox and day counter mechanisms.



Step 5 Click **Save and Exit** to retain any alterations you made within the Search Options Popup Window.

OR Click **Exit** to close the window without saving.

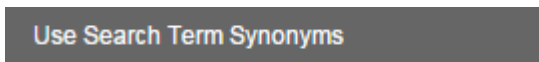
10.2.2 Use Search Term Synonyms

Users can select whether they would like to use Search Term Synonyms or not in their searches by checking/unchecking the Use Search Term Synonyms box.

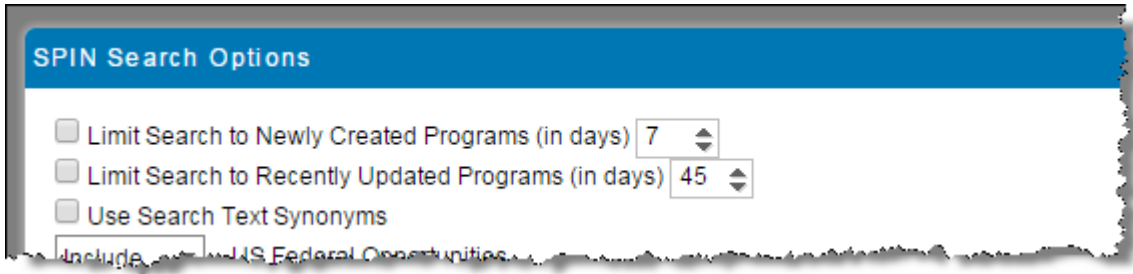
This option expands each search term via an integrated thesaurus in the database. Use this tool to increase the number of returned results, without having to type in additional search terms. For example, a search for "cancer" will also search for tumors, carcinoma, sarcoma, malignancy, etc.

To use Search Term Synonyms a user would follow the following steps:

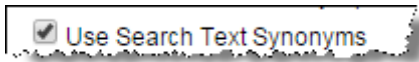
Step 1 Go to the Preferences Menu and click on the Use Search Term Synonyms menu item.



Step 2 The SPIN Search Options Popup will appear and the third checkbox will help them designate their preference.



Step 3 The user can select whether to use Search Term Synonyms by using the designated checkbox.



Step 4 Click **Save and Exit** to retain any alterations you made within the Search Options Popup Window.

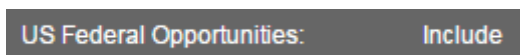
OR Click **Exit** to close the window without saving.

10.2.3 US Federal Opportunities

By default, any search users perform will return results that include US Federal opportunities. Clicking the down arrow reveals a pull-down menu, and allows users to choose to “Include,” “Exclude,” or “Only” find US Federal opportunities.

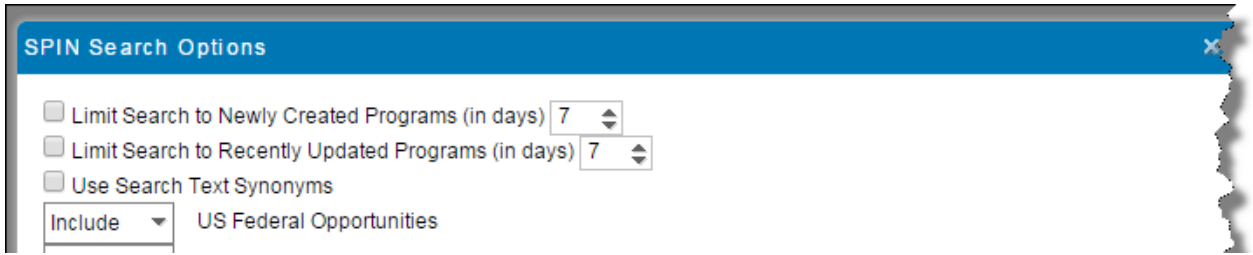
To use the US Federal Opportunities Search Option, a user would follow the following steps:

Step 1 Go to the Preferences Menu and click on the US Federal Opportunities menu item.

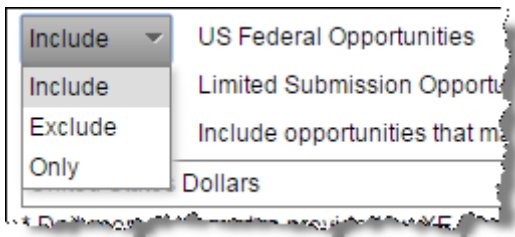


As you can see from the illustration above, the default for this search option is ‘Include’. If the user designates to change the value to Exclude or Only, the designated selection would appear on the Menu list instead of ‘Include’.

Step 2 The SPIN Search Options Popup will appear and the first drop-down list entitled US Federal Opportunities will help them designate their preference.



Step 3 The user can select whether to Include, Exclude or Only find US Federal Opportunities by selecting the desired option from the drop-down list.



Step 4 Click **Save and Exit** to retain any alterations you made within the Search Options Popup Window.

OR Click **Exit** to close the window without saving.

10.2.4 Limited Submission Opportunities

Limited submission opportunities are those that require internal coordination within an institution, for a specific application process. For example, some Sponsors may only accept one application from an institution; if any additional applications are sent, the entire institution will be disqualified. Clicking the down arrow reveals a pull-down menu, allowing users to choose to “Include,” “Exclude,” or “Only find” limited submission opportunities.

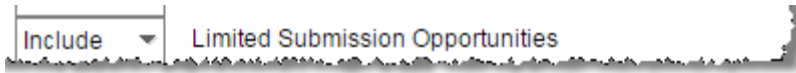
To use Search Term Synonyms a user would follow the following steps:

Step 1 Go to the Preferences Menu and click on the Use Search Term Synonyms menu item.

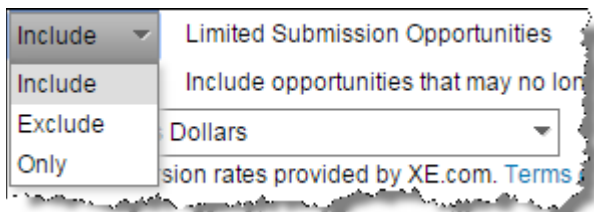


As you can see from the illustration above, the default for this search option is 'Include'. If the user designates to change the value to Exclude or Only, the designated selection would appear on the Menu list instead of 'Include'.

Step 2 The SPIN Search Options Popup will appear and the second drop-down list entitled Limited Submission Opportunities will help them designate their preference.



Step 3 The user can select whether to Include, Exclude or Only find US Federal Opportunities by selecting the desired option from the drop-down list.



Step 4 Click **Save and Exit** to retain any alterations you made within the Search Options Popup Window.

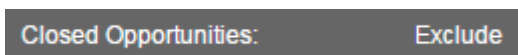
OR Click **Exit** to close the window without saving.

10.2.5 Closed Opportunities

SPIN contains opportunities that cannot be applied for at the present time. The system is defaulted to return only opportunities that users can currently apply for. Clicking the down arrow reveals a pull-down menu, allowing users to choose to "Include," "Exclude," or "Only find" opportunities that cannot currently be applied for.

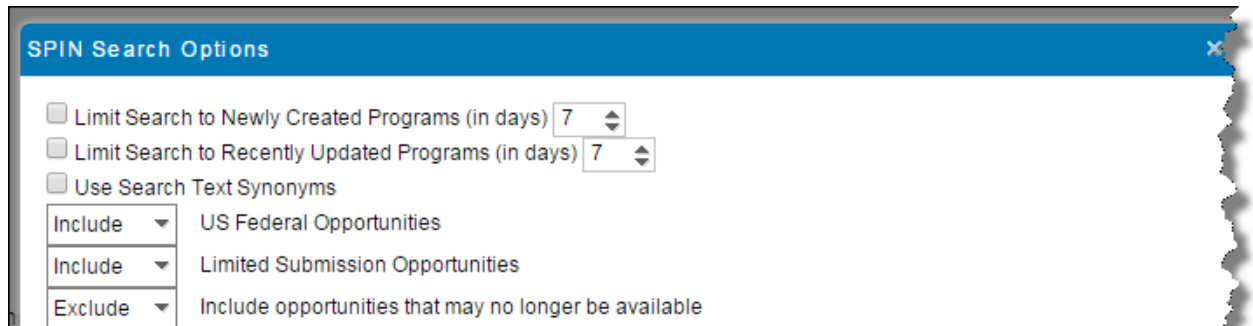
To use Search Term Synonyms a user would follow the following steps:

Step 1 Go to the Preferences Menu and click on the Use Search Term Synonyms menu item.

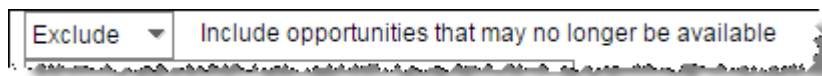


As you can see from the illustration above, the default for this search option is 'Exclude'. If the user designates to change the value to include or Only, the designated selection would appear on the Menu list instead of 'Exclude'.

Step 2 The SPIN Search Options Popup will appear and the third drop-down list entitled Include opportunities that may no longer be available will help them designate their preference.



Step 3 The user can select whether to Include, Exclude or Only find Closed Opportunities by selecting the desired option from the drop-down list.



Step 4 Click **Save and Exit** to retain any alterations you made within the Search Options Popup Window.

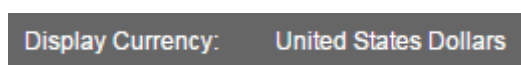
OR Click **Exit** to close the window without saving.

10.2.6 Currency Display

Clicking the down arrow reveals a pull-down menu containing many national currencies. When users perform a search, whatever type of currency they choose from this menu will display in all of their search results. Currency conversion rates are updated in real time by XE.com.

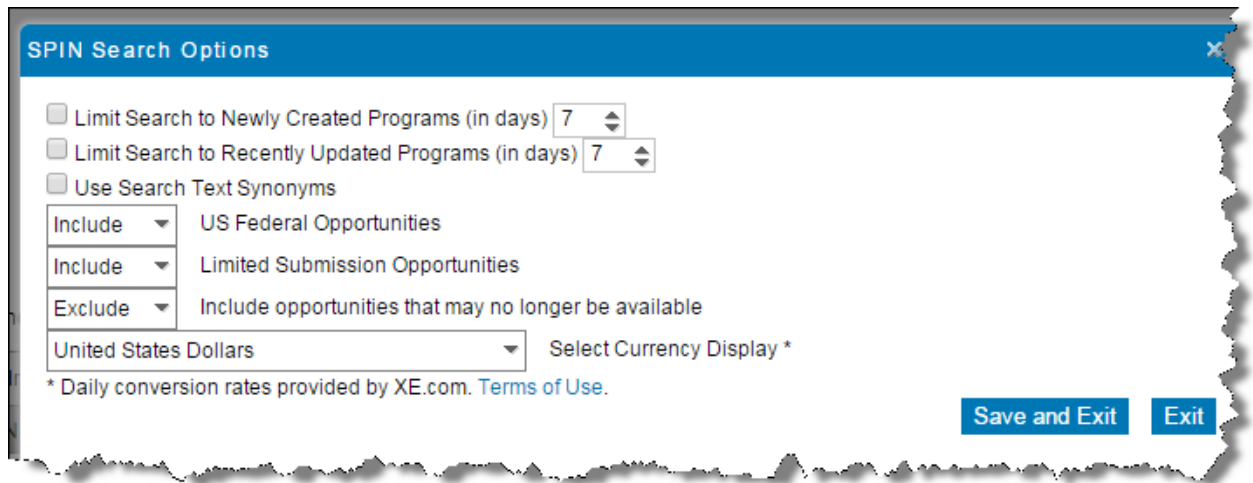
To designate a Currency Type, a user would follow the following steps:

Step 1 Go to the Preferences Menu and click on the Display Currency menu item.

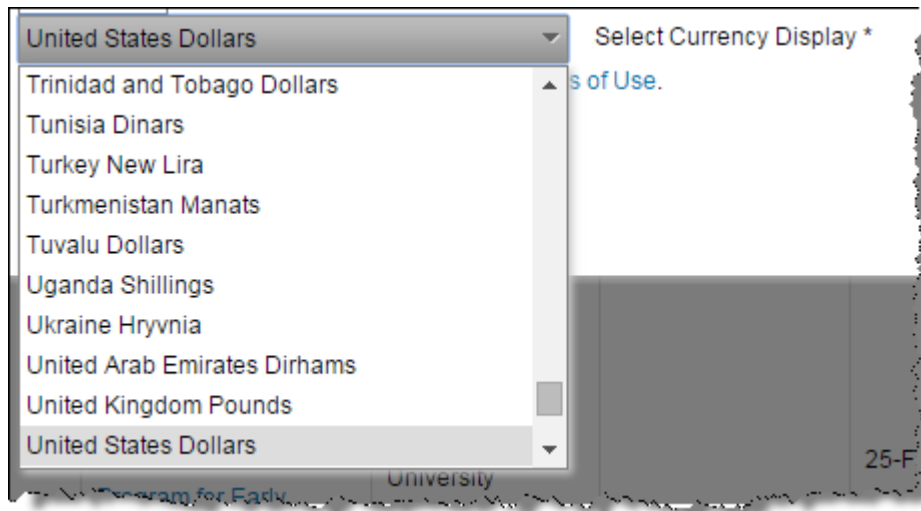


As you can see from the illustration above, the default for this search option is 'United States Dollars'. If the user designates to change the value to another form of currency, the designated selection would appear on the Menu list instead of 'United States Dollars'.

Step 2 The SPIN Search Options Popup will appear and the currency drop-down list will help them designate their preference.



Step 3 The user can select whether to use Select CurrencyDisplay drop-down list by using the designated checkbox.



Step 4 Click **Save and Exit** to retain any alterations you made within the Search Options Popup Window.

OR Click **Exit** to close the window without saving.

10.3 Export Data Options

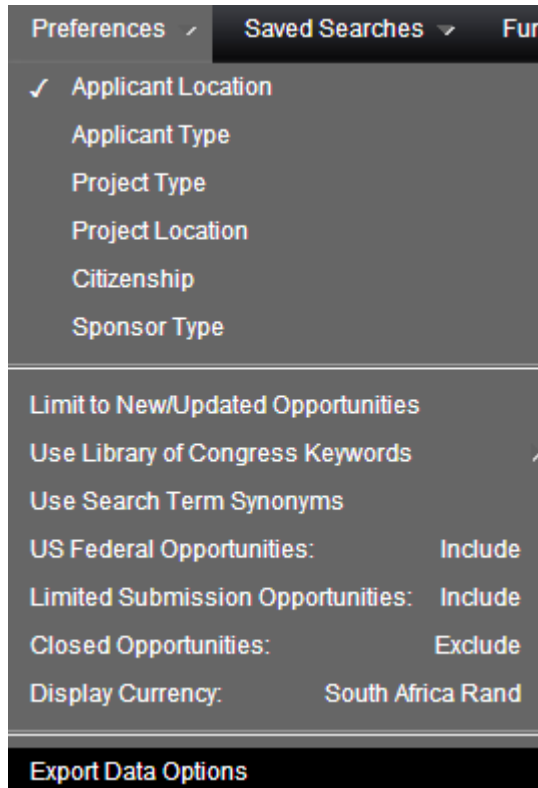
The Export Data Options menu item is the last item available under the **Preferences Menu**.

This popup is used to determine which columns, and in what order, will appear in the detail view of your returned results.

If nothing is selected, the system will not have items in detail view.

To access and utilize this search option, the user will follow the following steps:

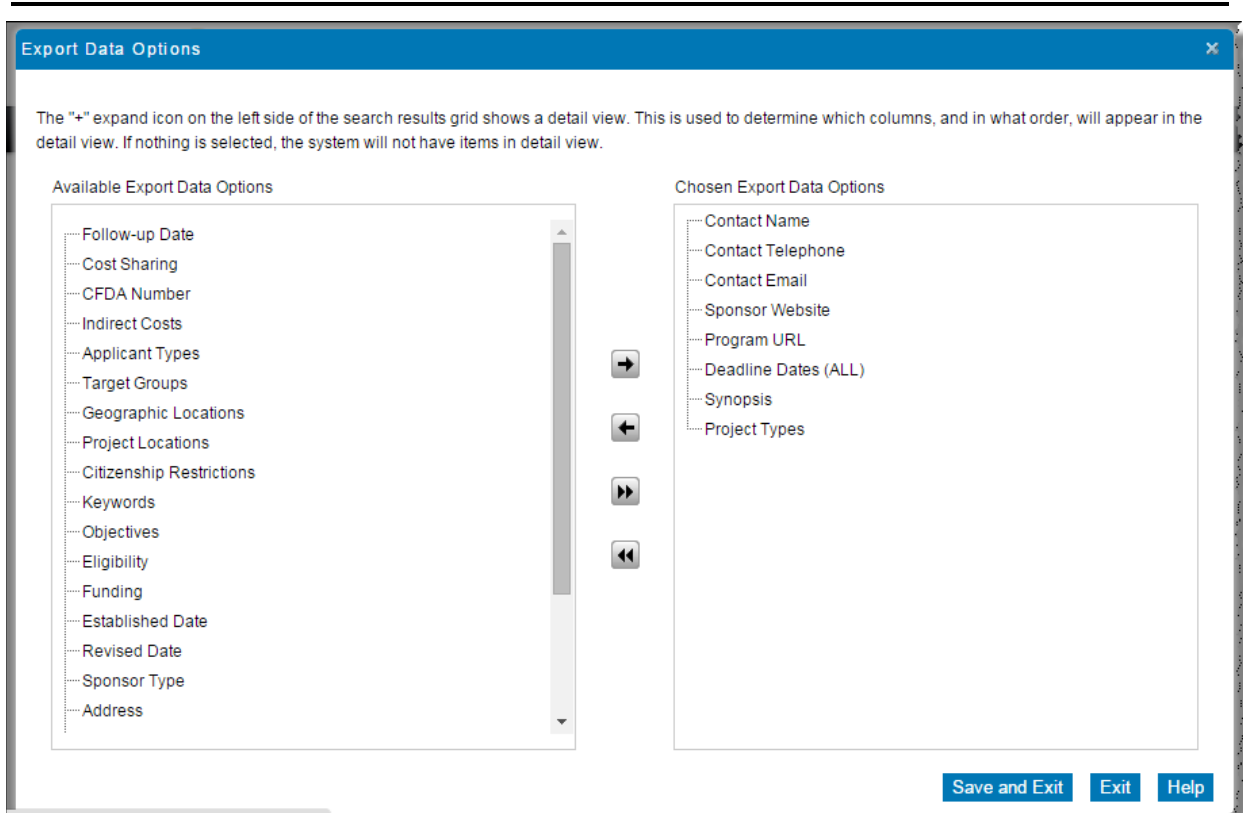
Step 1 Hover your cursor over the **Preferences Menu**, and select the Export Data Options as shown below.



Step 2 Click the Export Data Options menu link and the Export Data Options Popup Window will appear.

Figure 62

Export Data Options Popup Window



The Contact Name, Contact telephone, Contact Email, Sponsor Website, Program URL, Deadline Dates, Synopsis and Project Types columns are defaulted as chosen.

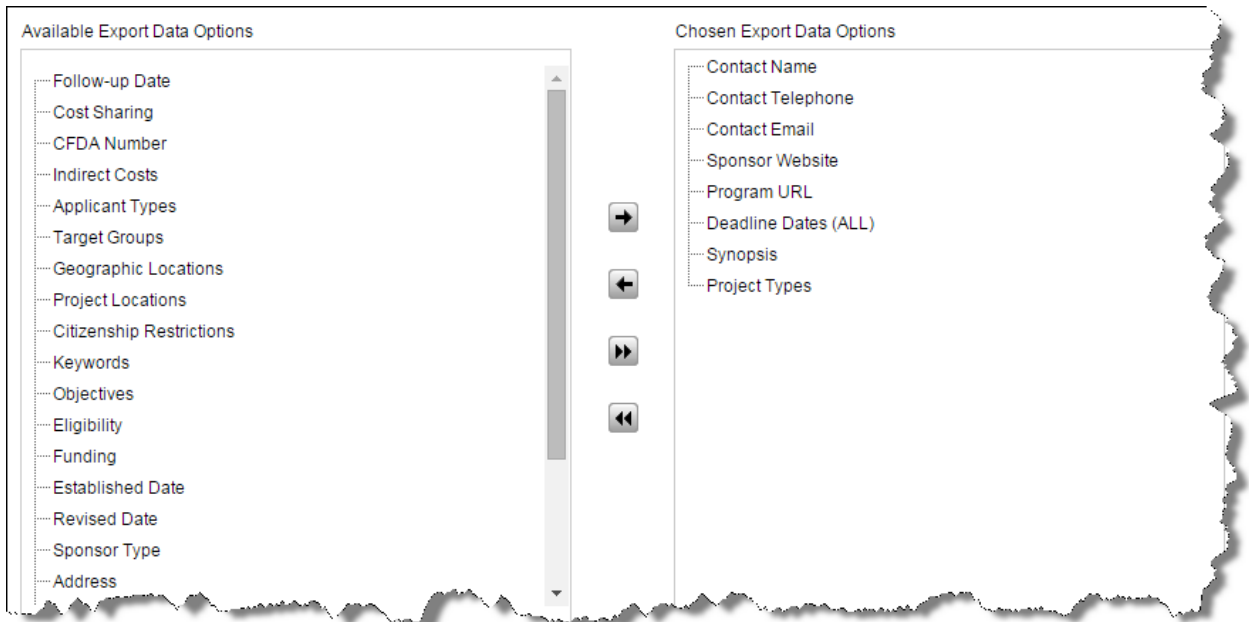
This window gives users the ability to make choices about what types of opportunity details will appear when they click on the **View Details Arrows** within returned results, and in what order they will appear.

- ❖ See Section 9.1—Exploring & Organizing Results for a description of View Details Arrows.

The window functions in a very similar manner to the Category Filters Popup Window. Arrows are used to move selected criteria from one table to another.

- ❖ See Sections 10.1.1—Navigating within the Category Filters Popup and 10.1.2—Applicant Location for a description of how to select and move criteria within the **Detail Columns Popup Window**.

Step 3 After making your selections in whatever order you prefer, by either dragging and dropping, double-clicking, or single-clicking and using the Move Right Arrow, your Export Data Options Popup Window will appear as shown below.



Step 4 Click **Save and Exit** to retain any alterations you made within the Search Options Popup Window.

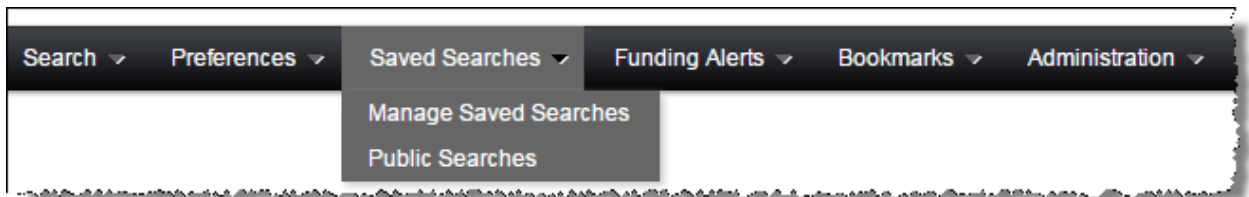
OR Click **Exit** to close the window without saving your choices.

From this point forward, all of your returned results (see Section 9—Returned Results) will contain the detail criteria you just selected beneath the View Details Arrows, as shown below.

Group by: drag and drop a column header to this section							
<input type="checkbox"/>	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount *	Bookmark
<input checked="" type="checkbox"/>	19236	Behavioral Sciences Research Training In HIV Infection	Columbia University		01-Dec-2013	Not Specified	+
		Detail Field Name	Detail Field Data				
		Contact Name					
		Contact Telephone	212-543-5353				
		Contact Email	postdoc@pi.cpmc.columbia.edu				
		Sponsor Website					
		Program URL	http://columbiapsychiatry.org/research/behavioral				
		Deadline Dates (ALL)	01-Dec-2013				
		Synopsis	The Behavioral Sciences Research in HIV Infection Training Program provides a postdoctoral research training program that provides intensive training in human sexuality research as applied to HIV prevention and HIV-related health interventions. The major components of our program are academic course work, the development of research and professional skills, and the conduct of independent research.				
		Project Types	Travel Domestic Training and Professional Development Fellowship				

11 Saved Searches Menu

The Saved Searches Menu is the third on SPIN's main toolbar. This menu is used to access previously saved search criteria and "run" them again, as well as access search criteria that other SPIN users have shared with you. Saved searches are only accessible to logged-in users.



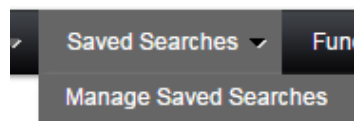
- ❖ See Section 6, 7 and 8 —Basic and Advanced Searches for information on how original searches are conducted, saved, and named.

The menu contains two items, as listed below and described in the corresponding subsections.

- Manage Saved Searches, Section 11.1
- Public Searches, Section 11.2

11.1 Manage Saved Searches

The first menu item in the Saved Searches Menu is **Manage Saved Searches**.



**Please
Note**

You must be logged in to SPIN to use this option, Anonymous Users will not be able to utilize this functionality.

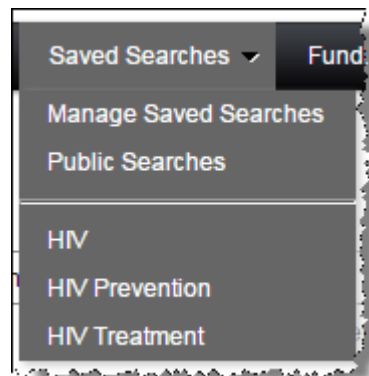
Within the functionality of this menu item, you may:

- See what searches are currently saved;
- See the dates that saved searches were created;
- See the date each search was last used;
- Learn whether or not the search was shared;
- Learn whether or not SMARTS Email Notifications are activated;
- Review the SMARTS Configuration History—*Administrators Only*; and,
- Delete saved searches with one click.



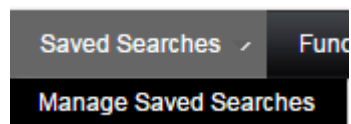
**Please
Note**

In the Saved Searches Menu, if there are existing saved searches, the bottom portion of the menu will be populated with the names of each of your saved searches. As you can see in the below illustration, the user has three saved searches – HIV, HIV Prevention and HIV Treatment. The user may click on these individual saved search links to load that specific search.



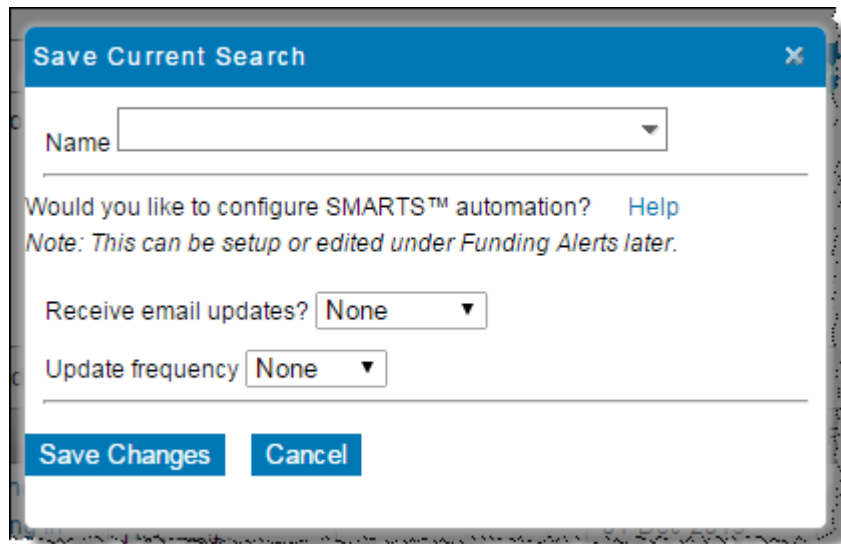
To access the Saved Searches functionality, the user will utilize the following steps:

Step 1 In the **Saved Searches Menu** on the toolbar, select 'Manage Saved Searches'.



Depending upon where you are/what you are doing in the SPIN system, you will be prompted to confirm that you would like to continue on with this step. If you have a search or search returned results open, you may have to confirm whether you would like to navigate off the search page you are currently on and risk losing your current search parameters/results.

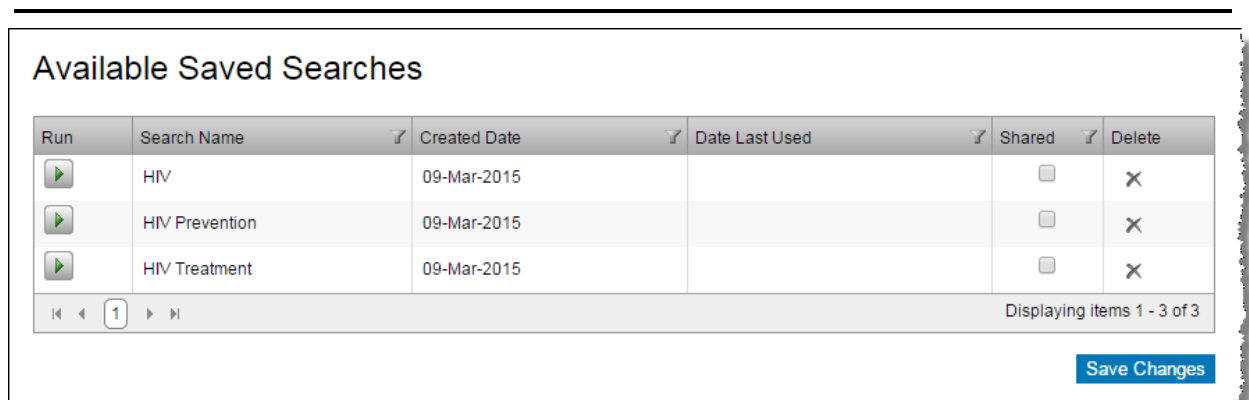
You have the choice to **Save and Continue** which involves saving your current search/results via the Save Current Search popup (below illustration) or you may continue by clicking **Continue** to move on without saving your current search/results or you can **Cancel** and remain on the same page you were on before selecting manage Saved Searches.



The image shows a 'Save Current Search' dialog box. It has a title bar with a close button. Below the title bar is a 'Name' dropdown menu. A horizontal line separates this from the main content area. The main content area contains the text: 'Would you like to configure SMARTS™ automation? [Help](#)'. Below this is a note: 'Note: This can be setup or edited under Funding Alerts later.' There are two dropdown menus: 'Receive email updates?' set to 'None' and 'Update frequency' set to 'None'. At the bottom of the dialog are two buttons: 'Save Changes' and 'Cancel'.

Step 2 Once you have confirmed your intent to access the Manage Saved Searches function, the Available Saved Searches Screen opens to display all the searches you have saved, as shown in Figure 63 below.



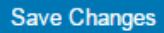

Figure 63 Available Saved Searches Screen



The image shows the 'Available Saved Searches' screen. It features a table with the following columns: Run, Search Name, Created Date, Date Last Used, Shared, and Delete. There are three rows of data, all with a creation date of 09-Mar-2015. Below the table is a pagination control showing '1' and 'Displaying items 1 - 3 of 3'. A 'Save Changes' button is located at the bottom right of the screen.

Run	Search Name	Created Date	Date Last Used	Shared	Delete
	HIV	09-Mar-2015		<input type="checkbox"/>	
	HIV Prevention	09-Mar-2015		<input type="checkbox"/>	
	HIV Treatment	09-Mar-2015		<input type="checkbox"/>	

The following table describes features and functions of the Available Saved Searches Screen.

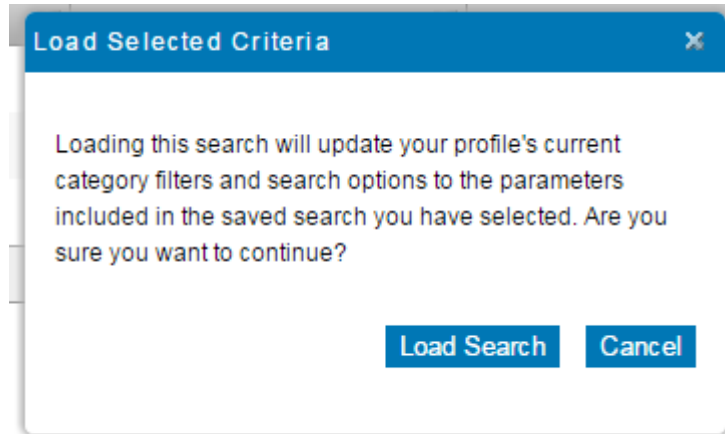
<p>Run </p>	<p>The arrow shown to the left is the Run Button. When a user “runs” a search they are applying existing search criteria that they created, (or that were created by another user who shared the search), to the pool of currently existing opportunities. SPIN returns the most up-to-date results from the latest data pool each time a search is run. Clicking the Run Button opens a Load Selected Criteria Popup Window. Users may either choose to Load Search (in which case the search will run, but current settings (such as filters or search options) will be lost, or users may Cancel the request.</p>
<p></p>	<p>The Filter Icon shown to the right top of a column appears within several columns of this screen and functions in the same manner as it does under Basic Search conditions. Users may filter each column, (except for the Run and Delete Columns), to find a particular Saved Search from numerous entries. See Section 9.5.10—Filtering Results for more information.</p>
<p>Search Name</p>	<p>These are the names users provided the last time they saved these particular sets of search criteria. Names can be changed without changing any criteria by clicking on a title and editing it, then clicking away from it anywhere else on the screen.</p>
<p>Created Date</p>	<p>This is the date that the search criteria were first saved. The display may be changed from ascending to descending by clicking in the Created Date Header until an arrow appears. Click on the arrow to adjust from ascending to descending, or back again.</p>
<p>Date Last Used</p>	<p>This is the date that the user last accessed the Saved Search. The date will update each time the user runs the search. The display may be changed from ascending to descending by clicking in the Date Last Used Header until an arrow appears. Click on the arrow to adjust from ascending to descending, or back again.</p>
<p>Delete</p>	<p>Users can quickly any saved search. Click the X next to the search you wish you delete. A popup window confirming the pending deletion will appear. Press OK to continue with the delete, or Cancel to abort. If you select OK, the screen will refresh without the Saved Search.</p>
<p></p>	<p>After making any changes, press the  button to retain your work.</p>




**Critical
Warning**

Deleting a saved search is a permanent action that cannot be reversed.

Step 3 When users click Run , the popup shown below will appear.



By clicking Run  to load the search, this task will clear previously set criteria or category filters. Grid settings (such as columns chosen within the Export Data Options Screen) will also be lost if you proceed. When a user loads and runs a Saved Search, they will then inherit the various Preference Filters, etc. associated with that Saved Search. These will now be the filters which will apply to future searches until the user decides to 'clear' all filters or manually implements new filters.

Step 4 Click  to continue.

OR Click  to return to the Available Saved Searches Screen (Figure 63).

Figure 64, shown below, depicts an example screen resulting from a loaded search.

Figure 64

Loaded Search Results

HIV

You have additional filters active. [Click here to edit them.](#)

Results Found: 66 [Reset Filters](#) [Export](#)

Group by: drag and drop a column header to this section

<input type="checkbox"/>	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount *	Bookmark
<input type="checkbox"/>	02190	HIV and Drug Use Research Fellowship - Professional Development Training for Well-Established HIV Researchers	International AIDS Society		10-Feb-2014	75,000.00 USD	+
<input type="checkbox"/>		Minority Medical Student Elective I	American Psychiatric				+



Please Note

After loading a saved search, its criteria, including category filters, can be modified. However, doing so will not alter the previously saved criteria. After modification, the user may save a shared search as their own by giving it a new name, or by overwriting the original if they created it. See Section 5.2.3—Saving Search Parameters, for more information.

11.2 Public Searches

The second option under the **Searches Menu** is Public Searches.

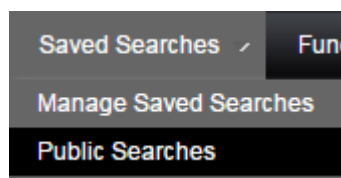
From here you may:

- See what searches other SPIN users have shared with you;
- See the dates that the shared searches were created;
- See the date each shared search was last used; and
- Learn who shared the search with you.

You may also filter search results and delete saved searches.

To access the Shared Searches Screen:

Step 1 Hover your cursor over the **Saved Searches Menu** on the toolbar click on the 'Public Searches' menu link.



The screen opens to a display of all the searches that your Administrator(s) have shared with you, as shown in Figure 65 below. Standard users can't share searches to the public searches area.

Figure 65

Available Shared Searches Screen

Run	Search Name	Created Date	Last Used	Shared By	History
	Saved Search_ Shared	28-Jun-2012		Lake, Kyle	
	1 - Non-US Citizen Postdoctoral	12-Feb-2012	27-Aug-2014	Jetter, David	
	5 - STEM	13-Feb-2012	29-Aug-2013	Jetter, David	
	6 - Limited Submission Renewable Energy	13-Feb-2012	08-Apr-2014	Jetter, David	
	Medical Education, Upcoming	14-Feb-2012	28-Oct-2013	Jetter, David	
	Dept Army with Medical	07-Mar-2012	30-May-2013	Jetter, David	
	Chem E Adv Search	14-Mar-2012	04-Mar-2014	Jetter, David	
	Kyle Saved Search	28-Jun-2012	28-Feb-2014	Lake, Kyle	
	Kyle	27-Jun-2012	07-Mar-2014	Lake, Kyle	
	168-Bio Energy	23-Aug-2012	23-Aug-2012	Nix, Kenny	

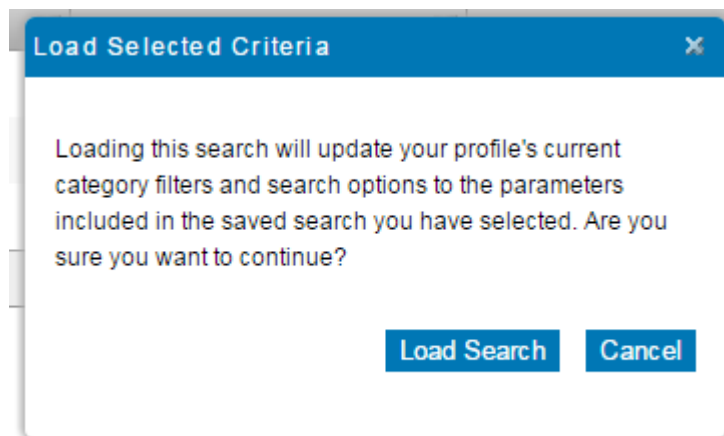
Displaying items 1 - 10 of 46


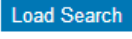

- ❖ Please see the previous section, Section 11.1—Saved Searches for a description of the screen’s features.

This screen differs only slightly from the **Available Saved Searches Screen** in that:

- Users cannot type into the Search Name Field to change names;
- It includes a column showing the names of the Administrator(s) who shared searches; and,
- It lacks the delete feature, as you cannot delete another user’s saved search.

Step 3 When users click Run , the popup shown below will appear.

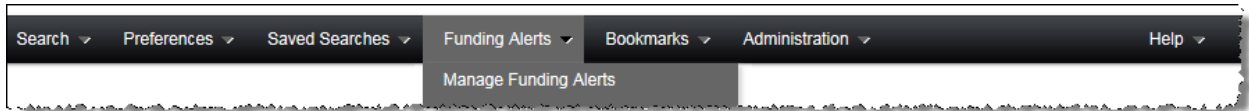


- By clicking Run  to load the search, this task will clear previously set criteria or category filters. Grid settings (such as columns chosen within the Export Data Options Screen) will also be lost if you proceed.
- **Step 4** Click  to continue.
- **OR** Click  to return to the Available Shared Searches Screen (Figure 65).

When users run a shared search, the same results that the person who created the search would see will be available to those users, and will be displayed in the resulting screen.

12 Funding Alerts Menu

The Funding Alerts Menu is the fourth menu item on SPIN's main toolbar. This menu is used to access and manage your SMARTS funding alerts.



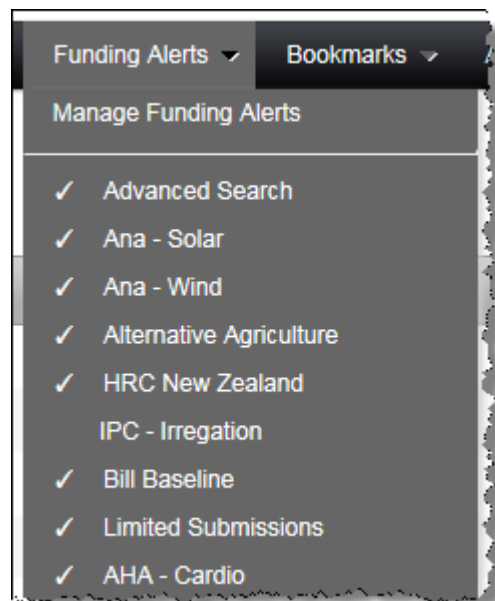
- ❖ See Sections 6, 7 and 8 —Basic, Keyword, and Advanced Searches for information on how original searches are conducted, saved, and named.

As you can see in the illustration above, the menu contains only one item – Manage Funding Alerts.



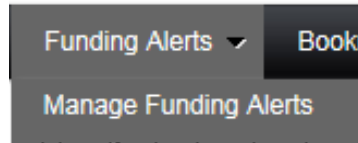
**Please
Note**

In the Funding Alerts Menu, if there are existing saved searches, the bottom portion of the menu will be populated with the names of each of your saved searches. As you can see in the below illustration, the user has many saved searches – Advanced Search, Ana – Solar and Ana – Wind are just the first three. The user may click on these individual saved search links to manage the funding alert for that specific search. A checkmark beside the Search Name indicates that a Funding Alert has already been set for that search.



12.1 Manage Funding Alerts

As previously mentioned, the only menu item in the Funding Alerts Menu is **Manage Funding Alerts**. This Manage Funding Alerts functionality is driven by InfoEd's SMARTS, an email notification feature that sends new or updated opportunity results from users' saved searches directly to their email inboxes.



**Please
Note**

You must be logged in to SPIN to use this option, Anonymous Users will not be able to utilize this functionality.

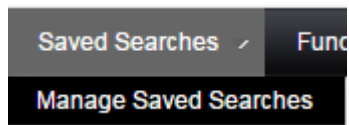
With this Manage Funding Alerts function, the user may choose to receive notifications on a daily or weekly basis for each of their saved searches.

Within the functionality of this menu item, you may:

- See what funding alerts are currently set up;
- See the dates that funding alerts were created;
- See the date each search was last used;
- Learn whether or not the search was shared;
- Learn whether or not SMARTS Email Notifications are activated;
- Review the SMARTS Configuration History—*Administrators Only*; and,
- Delete saved searches with one click.

To access the Funding Alert functionality, the user will utilize the following steps:

Step 1 In the **Saved Searches Menu** on the toolbar, select 'Managed Saved Searches'.



The Manage Funding Alerts Screen opens to a display all the searches you have saved, as shown in Figure 63 below.

Figure 66

Manage Funding Alerts Screen

Manage Funding Alerts

Search Name	Created Date	Date Last Used	SMARTS™ Automation		History
Advanced Search	12-Aug-2013	04-Mar-2015	Daily	HTML	
Ana - Solar	15-Aug-2013	24-Oct-2014	Daily	HTML	
Ana - Wind	19-Aug-2013	12-Aug-2014	Weekly	HTML	
Alternative Agriculture	03-Sep-2013		Weekly	HTML	
HRC New Zealand	18-Sep-2013	10-Feb-2014	Daily	HTML	
IPC - Irrigation	02-Oct-2013	05-Nov-2014	None	None	
Bill Baseline	03-Oct-2013	06-Jan-2015	Daily	HTML	
Limited Submissions	21-Oct-2013		Daily	HTML	
AHA - Cardio	10-Apr-2014		Daily	HTML	
CHSU - Biology	06-Feb-2014		Daily	HTML	

« « 1 2 3 4 5 6 » »
Displaying items 1 - 10 of 54

[Save Changes](#)

The following table describes features and functions of the Manage Funding Alerts Screen.

Search Name	These are the names the user provided the last time they saved these particular sets of search criteria. Names can be changed without changing any criteria by clicking on a title and editing it, then clicking away from it anywhere else on the screen.
	The Filter Icon shown to the right top of a column appears within several columns of this screen and functions in the same manner as it does under Basic Search conditions. Users may filter each column, (except for the Run and Delete Columns), to find a particular Saved Search from numerous entries. See Section 9.5.10—Filtering Results for more information.
Created Date	This is the date that the search criteria were first saved. The display may be changed from ascending to descending by clicking in the Created Date Header until an arrow appears. Click on the arrow to adjust from ascending to descending, or back again.

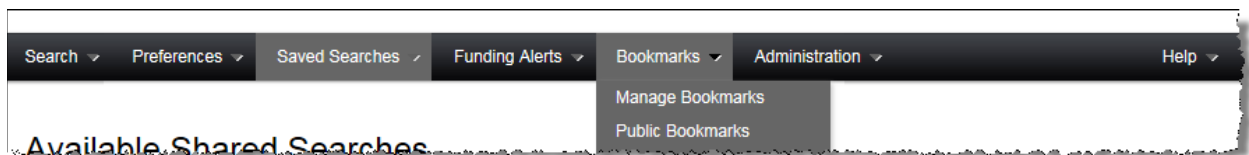
Date Last Used	This is the date that the user last accessed the Saved Search. The date will update each time the user runs the search. The display may be changed from ascending to descending by clicking in the Date Last Used Header until an arrow appears. Click on the arrow to adjust from ascending to descending, or back again.
SMARTS Automation	<p>This is a two-part column.</p> <p>The first column contains is the SMARTS Automation column which is a pull-down menu which allows users to activate SMARTS. If activated, users will receive updated results from their saved searches via email notifications. Click on the arrow next to <input type="text" value="Daily"/> and pull down and select either None, Daily or Weekly to choose how often to receive SMARTS email notifications for the selected search.</p> <p>Users must select either the Daily or Weekly option in order to activate SMARTS.</p> <p>The second column is the Email Format column contains a pull-down menu which allows users to choose which type of email format they prefer for SMARTS Email Notifications. Click on the arrow <input type="text" value="HTML"/> and pull down to select either None, HTML, or Plain Text. Users must select either the HTML or Plain Text options in order to activate SMARTS.</p> <p>In order to receive SMARTS Email Notifications, you must select options from <u>BOTH</u> the SMARTS Automation and Email Format Pull-down Menus.</p>
History	This column provides access to the configuration history of SMARTS, allowing Authenticated Users who have logged in and have setup automation on saved searches to review the history of their SMARTS runs. See Section 14.4—SMARTS Administration, for more information.
Save Changes	After making any changes, press the <input type="button" value="Save Changes"/> button to retain your work.

Step 2 Once the Manage Funding Alerts Screen opens, the user can make selections in the SMARTS Automation pull-down lists to enable the SMARTS funding alert functionality for the desired saved search(es).

Step 3 Click to retain any funding alert additions/alterations you made on the Manage Funding Alerts Screen.

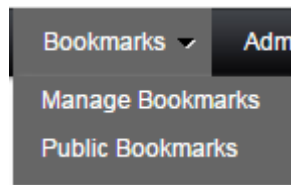
13 Bookmarks Menu

The Bookmarks Menu is the fifth menu item on SPIN's main toolbar. This menu is used to access opportunities that users have previously bookmarked. Administrators can also use this menu to share their bookmarked opportunities, or groups of opportunities, with other users.



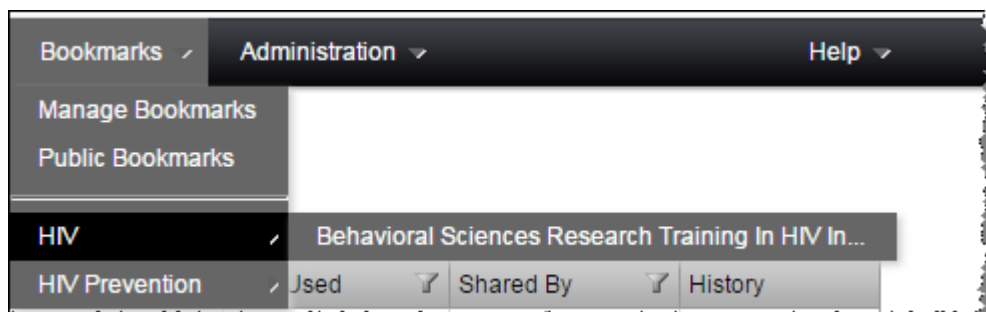
Please Note

Users must be logged-in to use the Bookmarks Menu.



Please Note

In the Bookmarks Menu, if there are existing bookmarks, the bottom portion of the menu will be populated with the names of each of your Bookmark Groups. As you can see in the below illustration, the user has saved two Bookmark Groups- HIV and HIV Prevention, the user can hover over a Group name to see individual bookmarks within that group and select one to open that opportunity directly.



There are numerous places within SPIN for users to create bookmarks—the Bookmarks Menu provides a way to re-access them conveniently.

- ❖ See Section 9.6—Bookmarking Opportunities, for information about how to create bookmarks.

The Bookmarks Menu contains two menu items, as listed below and described in the corresponding subsections.

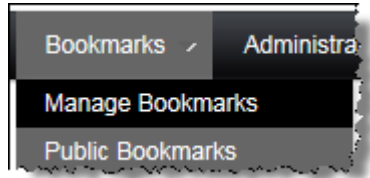
1. Manage Bookmarks
2. Public Bookmarks

13.1 Manage Bookmarks

From this option within the Bookmarks Menu, Authenticated Users who are logged in can access their previously bookmarked opportunities and Add Bookmark Groups or delete Bookmark Groups. Administrators can elect to make a Bookmark Group Public (Shared).

To do so:

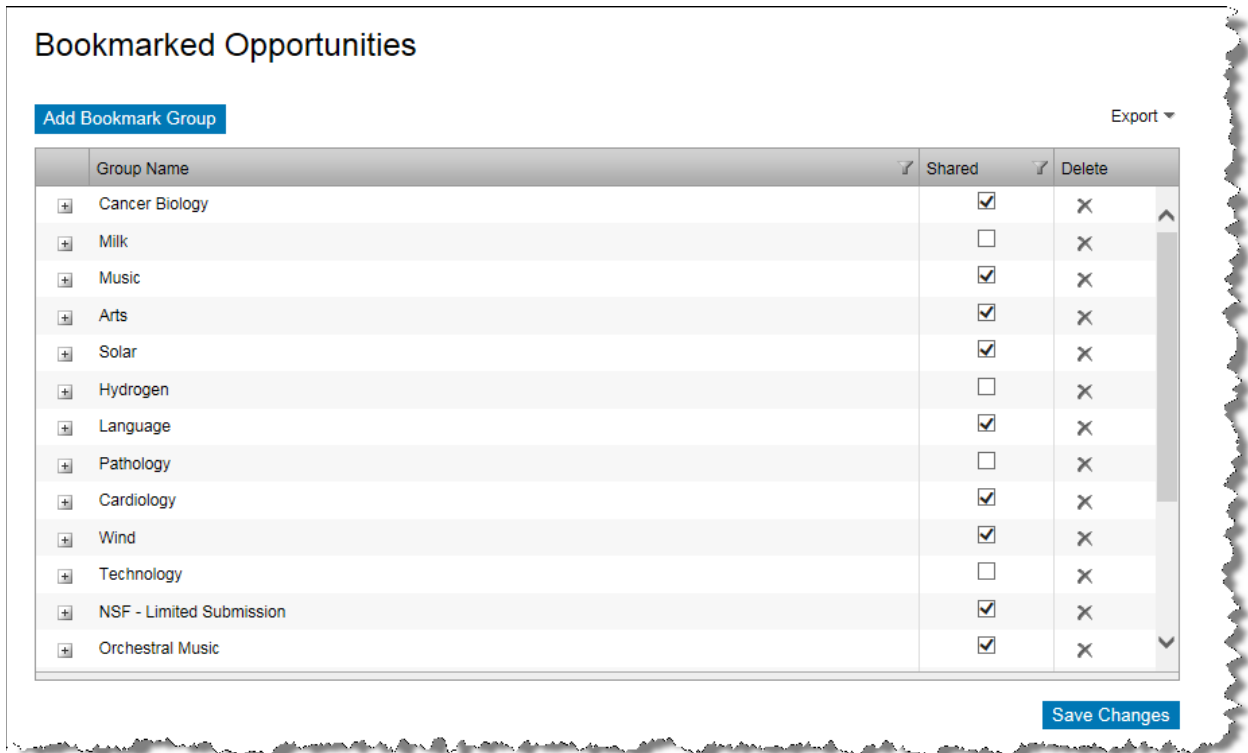
Step 1 Go to the Bookmarks Menu on the SPIN Toolbar and click on the Manage Bookmarks item.



The Bookmarked Opportunities screen opens to a display of all the opportunities the user has previously bookmarked, as shown in Figure 67 below. The figure shows that this user has also previously set up groups of bookmarks.


Figure 67

Bookmarked Opportunities Screen



Step 2 On the Bookmarked Opportunities Screen, scroll down using the gray scroll bar, until you see the group “Wind.”



Step 3 Click the  located to the left of the Wind entry. A list of opportunities that the user previously bookmarked and designated as part of the Bookmark Group “Wind” appears, as shown below.

Group Name		Shared	Delete			
Cardiology		<input checked="" type="checkbox"/>	X			
Wind		<input checked="" type="checkbox"/>	X			
SPIN ID	Opportunity T...	Sponsor Name	Sponsor Number	Deadline Date	Last Revised	Delete
30732	Research Grant	Australian Wound Management Association - South Australia			20-Feb-2014	X
32246	RFP -- Amendment -- Turkey - Smart Grid Upgrades to the Teias Electricity Transmission Network Feasibility Study MARC	U.S. Trade and Development Agency	2013-21005A		18-Mar-2013	X

Step 4 We can see several previously bookmarked opportunities there waiting for us to re-access them.

The information within the Bookmarked Opportunities Screen is organized very similarly to SPIN's **Returned Results** and **Saved Searches Screens**, and the screen contains similar features.

- ❖ See Sections 8.2.7—Returned Results and 11.1—Saved Searches, for more information on how to use this screen.

The Add New Bookmark Group function (**Add Bookmark Group**) is the only difference between the functionality of this screen versus other similar screens within SPIN.

To create a new bookmark group:

Step 1 From the Bookmarks Menu select **Manage Bookmarks**. The Bookmarked Opportunities Screen will appear (as shown below).

Step 2 Click on the **Add Bookmark Group** button. The Add New Group popup will appear.

Add New Group

Name

Shared

Save Changes Cancel

Step 3 Type your desired group name into the blank field.

Add New Group

Name

Shared

Save Changes Cancel

A checkbox gives users the opportunity to share the new group with other users, as shown below. If the user opts to click into it, then their new group will be shared with others within their institution.

Add New Group

Name

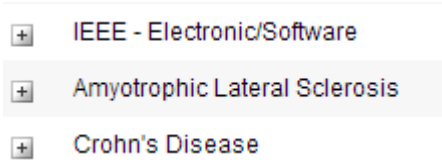
Shared

Save Changes Cancel

Step 4 Click **Save Changes** to save your selections.

OR Click **Cancel** to revert back to the Bookmarked Opportunities Screen, without saving your choices.

Clicking **Save Changes** results in the new group name appearing in your bookmarked opportunities, as shown below.

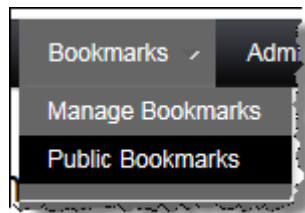


13.2 Public Bookmarks

In the **Public Bookmarks** area, users can access folders of bookmarked opportunities that have been shared by their Administrator. Standard users can't share bookmarked opportunities or folders in the public area.

To do so:

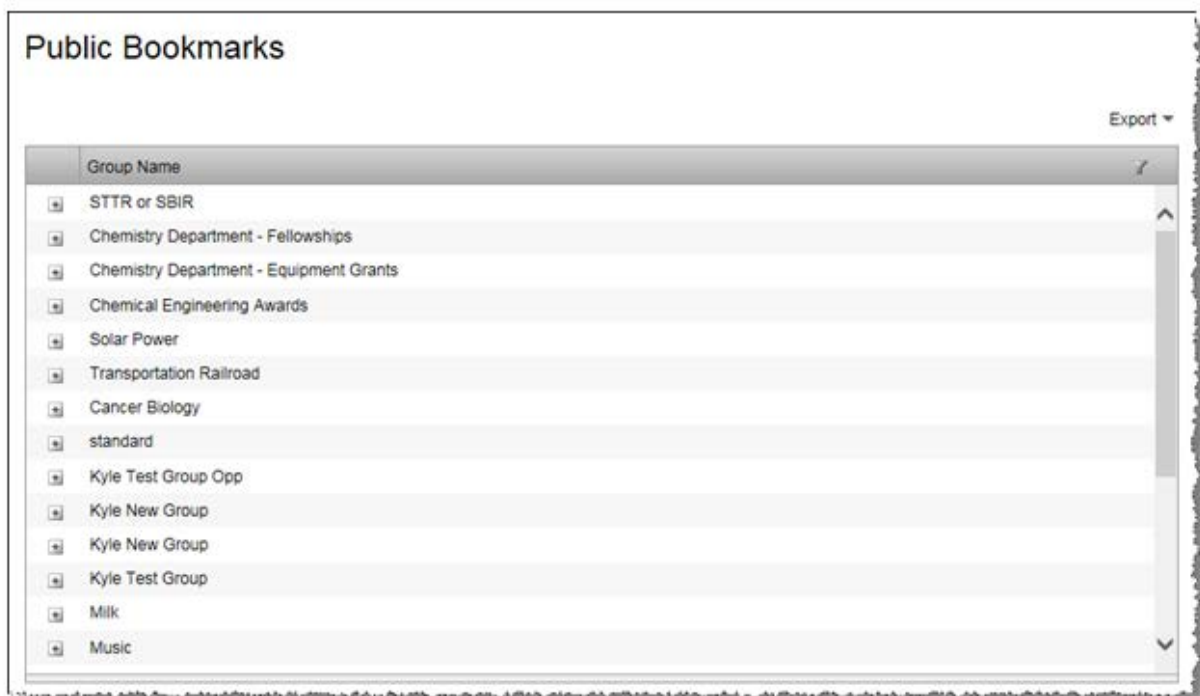
Step 1 Go to the Bookmarks Menu on the SPIN Toolbar and click on the Public Bookmarks item.



The Public Bookmarks screen opens to display a list of Bookmark Groups and Bookmarks shared by your institutional SPIN administrator(s) as shown in Figure 67 below.


Figure 68

Public Bookmarks Screen



As you can see there are a number of saved searches listed on this page.

To access any of these saved searches, the user would simply:

Step 3 Click the  located to the left of any entry. A list of opportunities that the given user previously bookmarked and designated as part of that bookmark group appears, as shown below.

Group Name						
+ Transportation Railroad						
- Cancer Biology						
SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Last Revised	
02275	Research Grants	Sarcoma Foundation of America			14-Oct-2013	
14122	Prospective Sample Collections Project Grants	Cancer Research UK			04-Jan-2013	
21868	Postdoctoral Fellowship Program (Temporarily Suspended)	Oklahoma Medical Research Foundation (OMRF)			06-Nov-2013	
76042	Specialized Programs of Research Excellence (SPOREs) in Human Cancer for Years 2013 and 2014 (P50)	National Cancer Institute/NIH/DHHS	PAR-12-296		10-Oct-2013	
18417	Alliance Scholar Award	Cancer and Leukemia			27-Jun-2014	

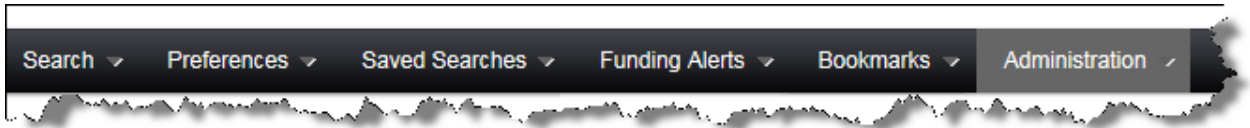
Step 4 In this above illustration example, we can see several previously bookmarked opportunities listed under a bookmark group ‘Cancer Biology’. These opportunities are there waiting for us to access/re-access them.

The information within this Public Bookmarks – or – Personal Bookmarks Screen is organized very similarly to SPIN’s **Returned Results** and **Saved Searches Screens**, and the screen contains similar features.

- ❖ See Sections 9 —Returned Results and 11.1—Saved Searches, for more information on how to use this screen.

14 Administration Menu

The Administration Menu is the sixth menu of seven menu items on the main SPIN Toolbar.



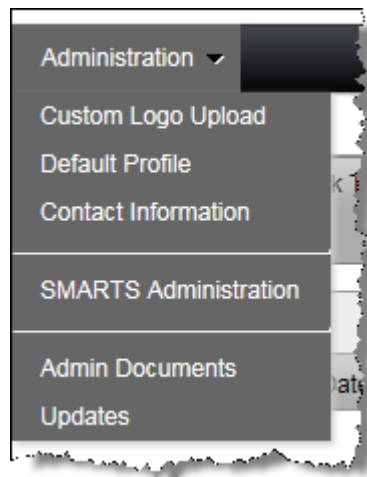
**Please
Note**

This entire Menu is only visible/accessible if the user has logged in with an Administrative level security access.

SPIN is designed to allow administrators to maximize the usability and efficiency of the system to ensure all their users are getting the best possible results.

As such, Administrators can utilize numerous features within the SPIN Administration Menu to:

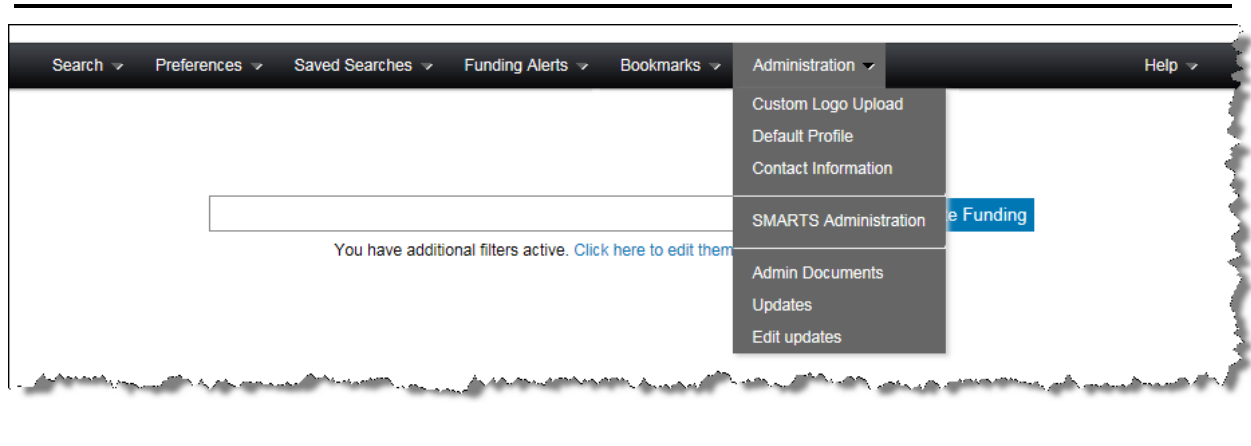
- Customize the appearance of SPIN to match their institution's branding;
- Configure default category filters for institution-wide use;
- Provide default contact information to attach to each found opportunity; and,
- Generate SMARTS reports for individual users, or groups of users.



As you can see in the above illustration, if you hover your cursor over the Administration Menu of the toolbar, the menu expands to display six links:

1. Custom Logo Upload, Section 14.1
2. Default Profile, Section 14.2
3. Contact Information, Section 14.3
4. SMARTS Administration, Section 14.4
5. Admin Documents, Section 14.5
6. Updates, Section 14.6

Figure 69 Administration Menu Items



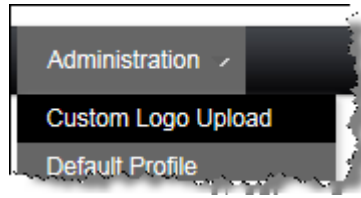
14.1 Custom Logo Upload

Custom Logo Upload allows you to transmit your institution's logo to SPIN. It will then appear on all SPIN screens when users conduct searches.

To access the Custom Logo Upload Option:

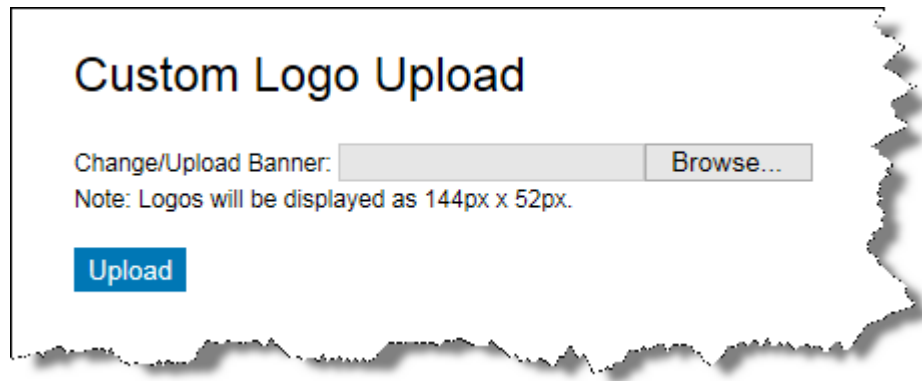
Step 1 Hover your cursor over the **Administration Menu** of the toolbar.

Step 2 Move it down until "Custom Logo Upload" and click.



Step 3 Next, the Custom Logo Upload mechanism will appear in the SPIN Window (Figure 70), allowing the Administrator to Change/Upload a banner (logo).

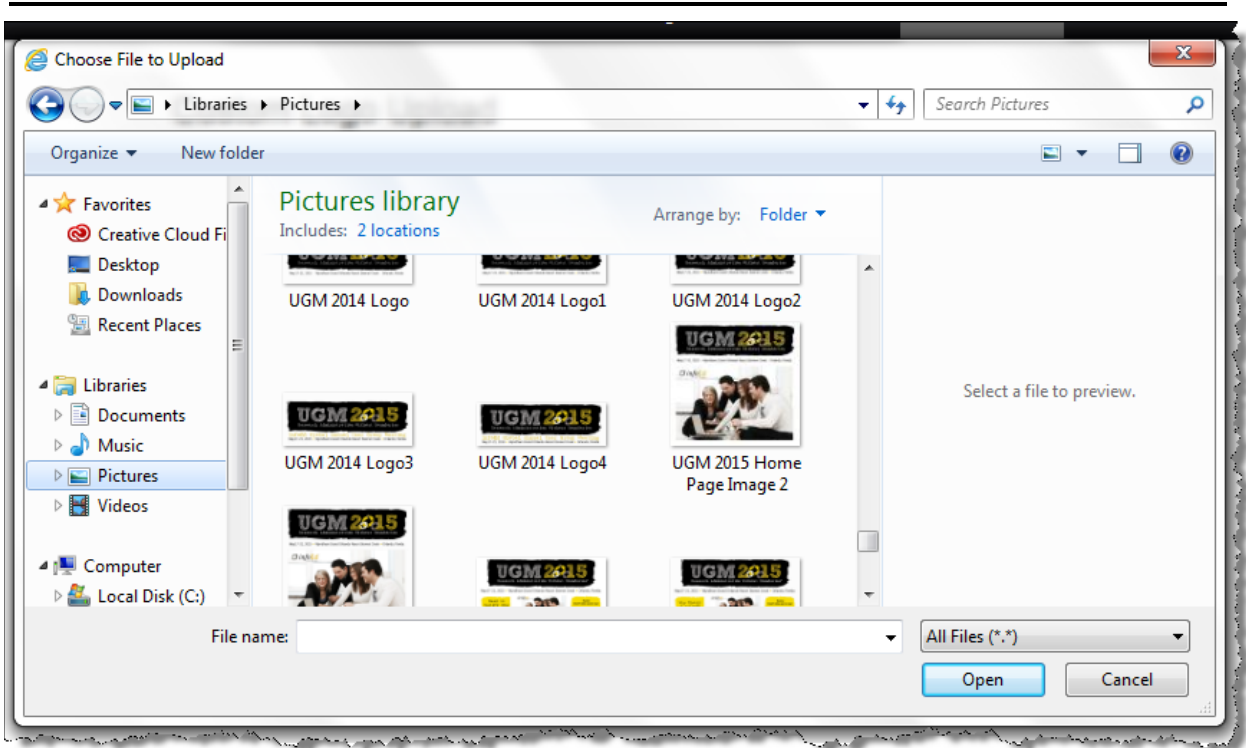
Figure 70 Custom Logo Upload



Step 4 Click on the Browse... button to access the Choose File to Upload Popup (Figure 71).

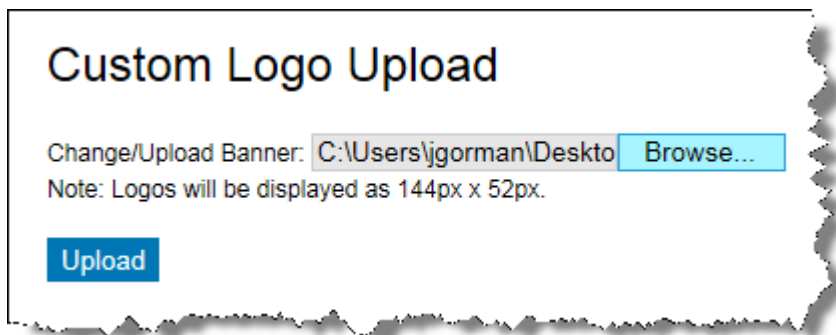
Figure 71

Choose File to Upload Popup



Step 5 Your local files will appear and you can click on the file you want, then click “Open” on your computer’s software popup window.

As you can see in the illustration below, the Custom Logo Upload page has been updated to include the select image’s location.



Step 6 Click the **Upload** button on this page, the Custom Logo Upload page will be refreshed to include the illustration of your selected image.



Step 7 Click **Upload** to close this upload mechanism and transmit your logo for display.

SPIN will automatically adjust the size of the logo to make it fit proportionally on SPIN pages.

Step 8 To remove your institution's logo at any time, click **Remove**.

After removing the previous logo with the **Remove** button, you can add a new logo at any time by repeating the steps in this section.

14.2 Default Profile

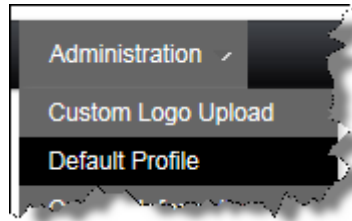
As an administrator, you have the option to create and place a set of defaults that will apply to all searches that are conducted by your institution's SPIN users.

For example, if you prefer that all of your users search just for funding opportunities that are available in a particular location, you can set that parameter within the Institution Default Profile Window, and be confident that none of your users are returning useless SPIN search results from outside of your preferred location.

To access the Default Profile Feature:

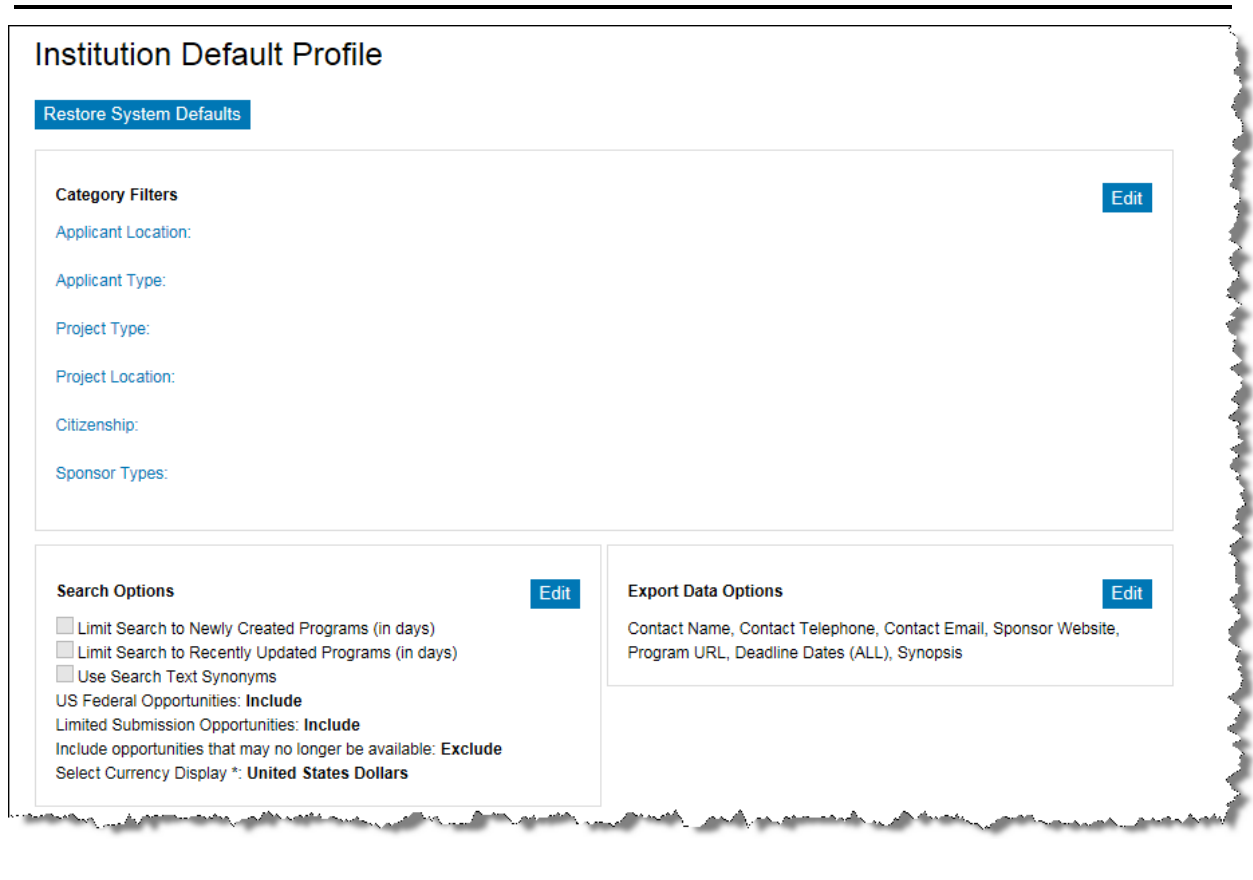
Step 1 Hover your mouse over the **Administration Menu** of the toolbar.

Step 2 Move it down until the words “Default Profile” and click.



The Institution Default Profile Window (Figure 72) will appear.

Figure 72 *Institution Default Profile Window*



The Institution Default Profile Window has three sections:

- Category Filters, Section 10.1
- Search Options, Section 10.2
- Export Data Options (Detail View Options), Section 10.3

14.2.1 Category Filters Section

This is the first section of the **Institution Default Profile Window** (see Figure 72). Category Filters allow administrators to set the parameters listed below.

- Applicant Location
- Applicant Type
- Project Type
- Project Location
- Citizenship Status
- Sponsor Type

Figure 73 *Institution Default Profile Window—Category Filters Section*

Institution Default Profile

[Restore System Defaults](#)

Category Filters [Edit](#)

Applicant Location:

Applicant Type:

Project Type:

Project Location:

Citizenship:

Sponsor Types:

Search Options [Edit](#)

Limit Search to Newly Created Programs (in days)

Limit Search to Recently Updated Programs (in days)

Use Search Text Synonyms

US Federal Opportunities: **Include**

Limited Submission Opportunities: **Include**

Include opportunities that may no longer be available (Suspended Opportunities): **Exclude**

Select Currency Display *: **United States Dollars**

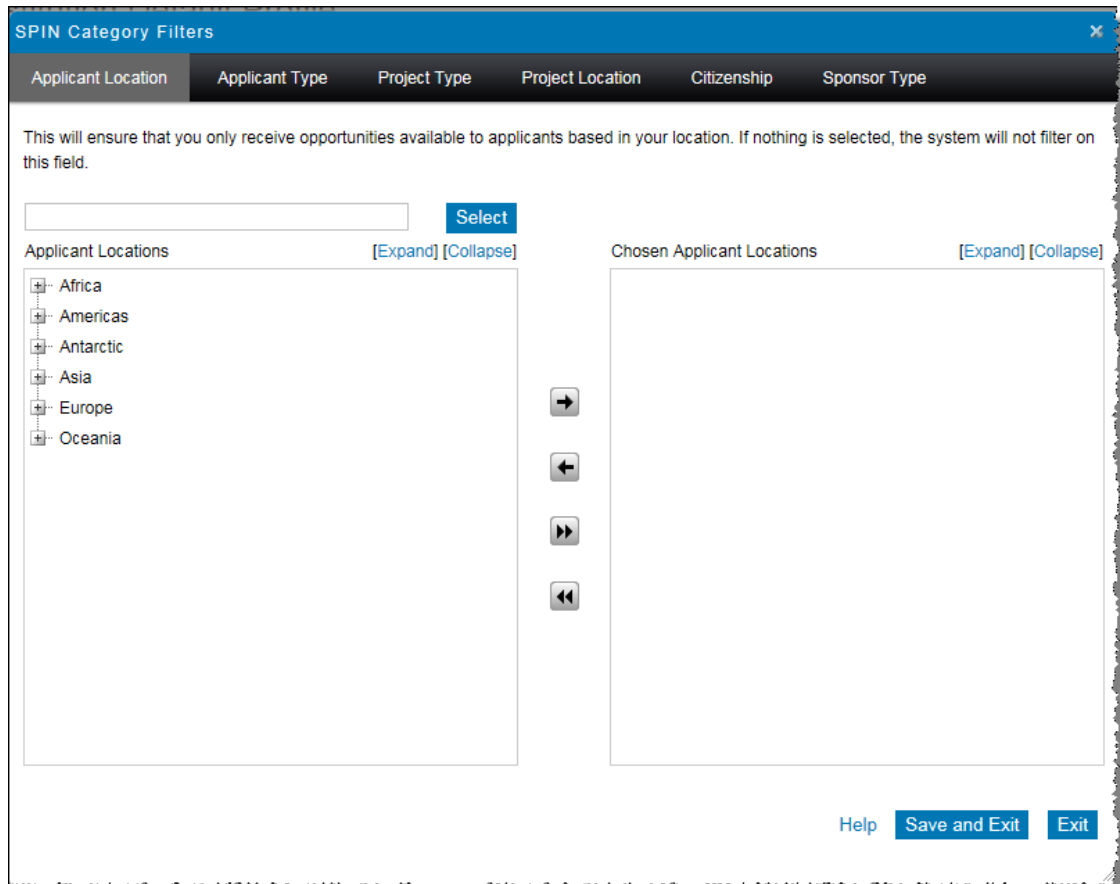
Export Data Options [Edit](#)

Contact Name, Contact Telephone, Contact Email, Sponsor Website, Program URL, Deadline Dates (ALL), Synopsis, Indirect Costs, Citizenship Restrictions

To manipulate these settings:

Step 1 Click **Edit** in the top, right-hand corner of the Category Filters Section.

The SPIN **Category Filters Popup** will appear, as depicted below (and in Figure 54 within Section 10.1.1—Navigating within the Category Filters Popup).



Step 2 From here, you can manipulate the various filters and then click **Save and Exit** to save your changes or **Exit** to close the window without saving the edits.



Key Concept

Section 10—Preferences Menu thoroughly describes how to use the filters. As an administrator, you would follow the user instructions provided in that section to make your selections. However, the difference is that when you make your selections from the Administration Menu, they will become the default for every SPIN search that is conducted within your institution. These Administrator settings are the default setting but end users still have the ability to override these defaults by setting their own filters which will then override the defaults set by the Administrator.

14.2.2 Search Options Section

The second section of the **Institution Default Profile Window** (see Figure 72) is the Search Options Section (Figure 74). This area allows administrators to establish additional search criteria which will become the default parameters for every SPIN search conducted within the institution.

These options allow you to customize your search in the ways noted below:

- Expand your search terms via thesaurus
- Limit searches to only newly-created programs
- Limit searches to only recently updated programs
- Include or exclude Federal government opportunities
- Include or exclude opportunities that are currently open for application
- Choose what type of currency is displayed in search returns

Figure 74 *Institution Default Profile Window—Search Options Section*

SPIN Search Options

Limit Search to Newly Created Programs (in days) 7

Limit Search to Recently Updated Programs (in days) 7

Use Search Text Synonyms

Include ▼ US Federal Opportunities

Include ▼ Limited Submission Opportunities

Exclude ▼ Include opportunities that may no longer be available

United States Dollars ▼ Select Currency Display *

* Daily conversion rates provided by XE.com. [Terms of Use.](#)

Save and Exit Exit

To manipulate these options:

Step 1 Click on **Edit** in the top, right-hand corner of the section.

The SPIN Search Options Popup Window will appear. This window is depicted in Figure 61 within Section 10.2, SPIN Preference Menu Search Options. Please refer to that section for instructions on how to make selections within the window.

After making selections:

Step 2 Click **Save and Exit** to save your changes to the Institution Default Profile.

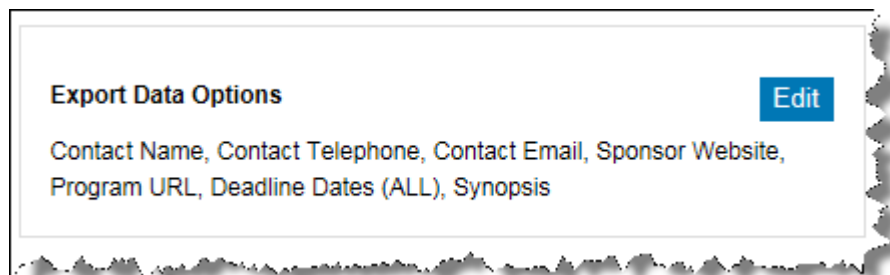
OR Click **Exit** to leave edit mode without saving any of your changes to the Institution Default Profile.

14.2.3 Export Data Options Section

This is the third section of the **Institution Default Profile Window** (see Figure 72). It allows administrators to decide what type of information they would like every institution SPIN user to see within the program details view on returned searches (see Section 9, Returned Results).

The Export Data Options Section can also be used to set what the order the details are presented in. For example, Figure 75 shows that an administrator decided that they wanted their institution's users to see *Contact Name first* when accessing the SPIN detail view feature.

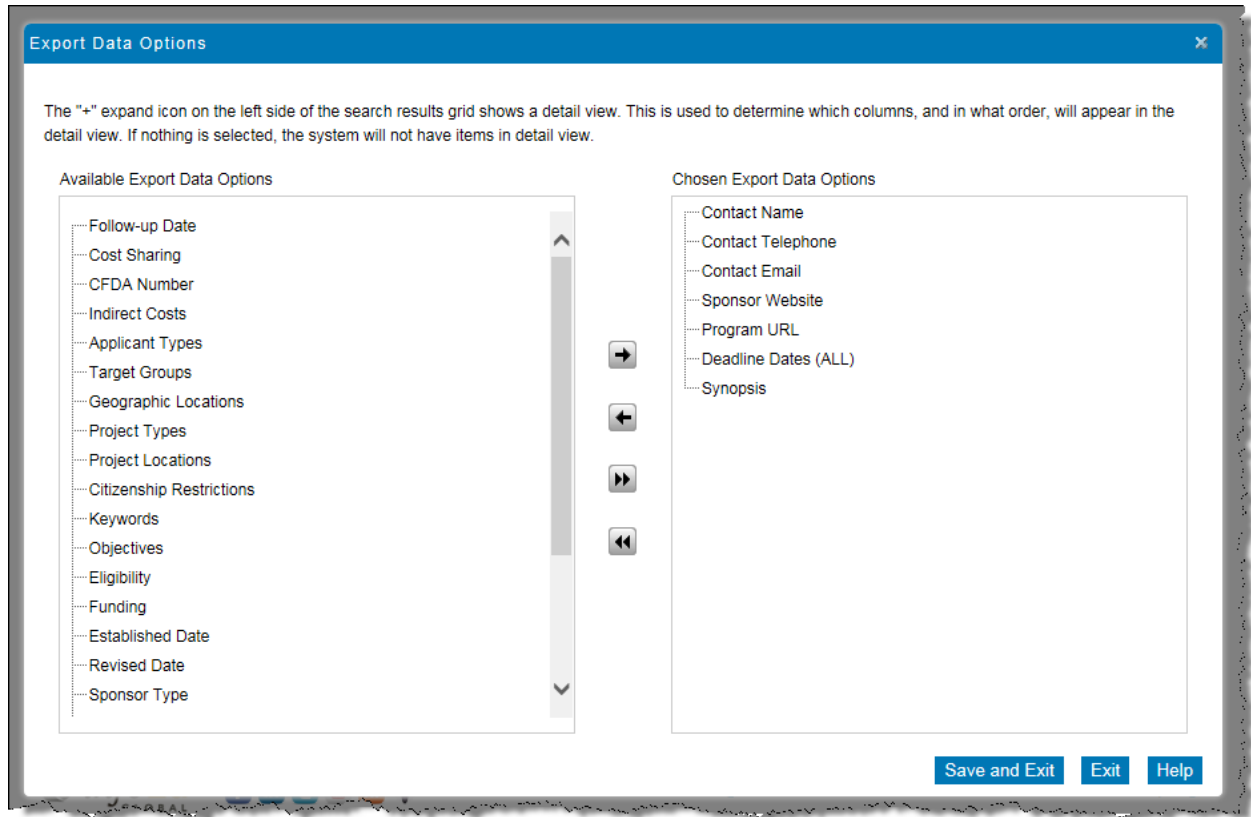
Figure 75 *Institution Default Profile Window—Export Data Options Section*



To set which criteria will appear within detail views within returned SPIN opportunities:

Step 1 From the top, right-hand corner of the Export Data Options Section, click **Edit**.

The **Export Data Options Popup Window** will appear (see Figure 62 in Section 10.3—Detail View Column Options).



Step 2 As an administrator, you should follow the SPIN user instructions provided in Section 10.3 to make your selections, and to put them in the order you prefer.



Key Concept

Please note that when you make these selections from the Administration Menu, they will become the default parameters for every SPIN search that is conducted within your institution.

Step 3 After making selections, click **Save and Exit** to save your changes to the Institution Default Profile.

OR Click **Exit** to leave edit mode without saving any of your changes to the Institution Default Profile.

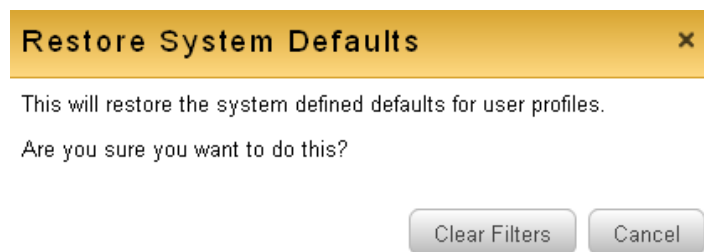
14.2.4 Restore System Defaults

This feature within the **Institution Default Profile Option** of the **Administration Menu** allows administrators to clear previously selected criteria that were chosen from any of the following Institution Default Profile Sections.

- Category Filters
- Search Options
- Detail Columns

From **Administration Menu** > **Default Profile**:

Step 1 Click **Restore System Defaults** in the top, right-hand corner of the window. A popup window will appear, as shown below.



Step 2 Verify whether or not you want to clear all the previous category filters you have used.

Step 3 Click **Clear Filters** if you are sure you want to override your previous category filters, search options and detail columns selections.

OR Click **Cancel** if you do not want to restore the SPIN system defaults.

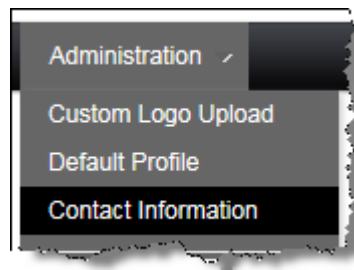
14.3 Contact Information

This is the third option under the **Administration Menu**. It allows administrators to add personalized contact information or instructions, which will then appear in every opportunity that their SPIN users find.

To access the Contact Information Feature:

Step 1 Hover your cursor over the **Administration Menu** of the toolbar.

Step 2 Move it down until the words “Contact Information” and click.

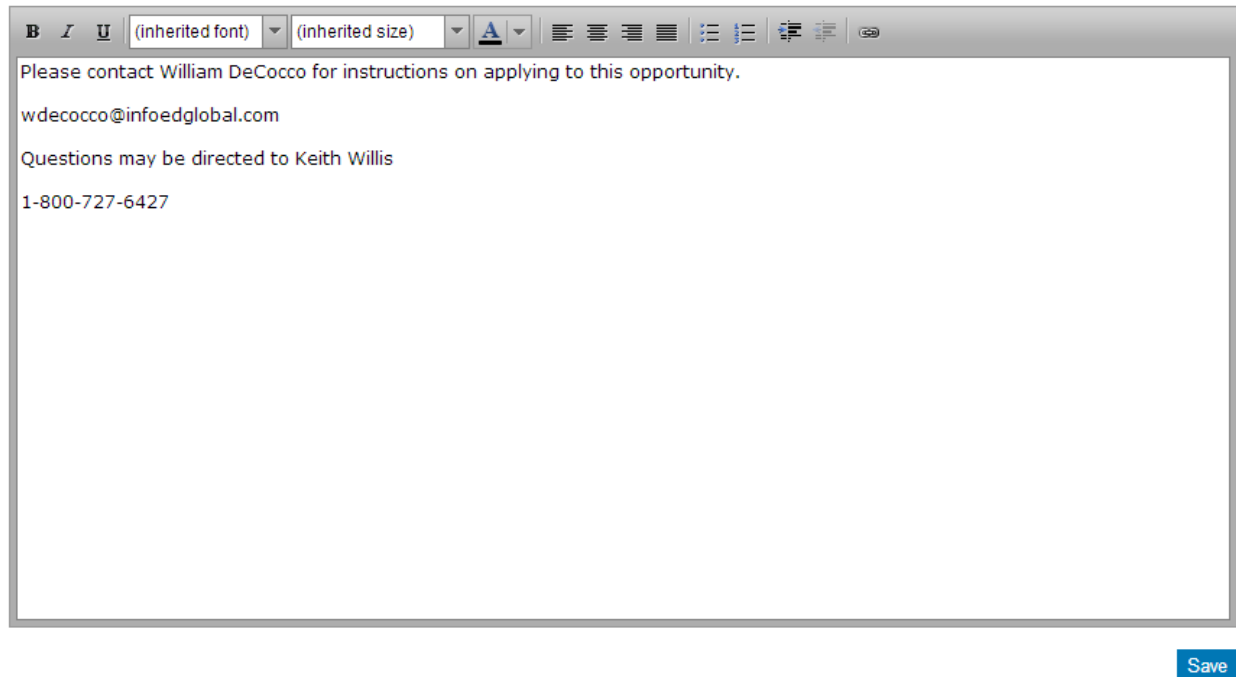


The Institution Contact Information window will appear, as shown below.

Figure 76

Institution Contact Information Window

Institution Contact Information



The screenshot shows a rich text editor window titled "Institution Contact Information". The editor has a toolbar with icons for bold, italic, underline, font color, background color, bulleted list, numbered list, link, and unlink. The text area contains the following content:

Please contact William DeCocco for instructions on applying to this opportunity.
wdecocco@infoedglobal.com
Questions may be directed to Keith Willis
1-800-727-6427

A blue "Save" button is located at the bottom right of the window.


Step 3 Enter the preferred contact information for your institution. Standard text formatting features are available in the window to customize the appearance of the information.



Quick Tip

You can include any customized instructions you would like your institution's users to adhere to.

Use the formatting bar to add hyperlinks to information your SPIN users will need to properly respond to funding opportunities.

Step 4 Click  to set your entry as the default contact information/instructions for your institution.

When institution users click on Opportunity Information Links (see Figure 45 within Section 9.1.7) in returned results, the information you entered here will appear on the lower, right-hand side of the window.

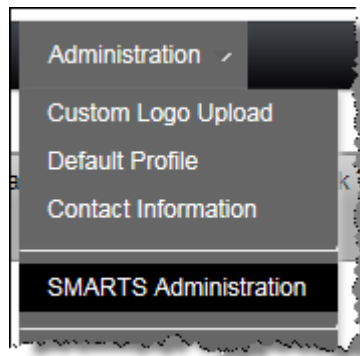
14.4 SMARTS Administration

This is the fourth item under the **Administration Menu**. It allows administrators to generate feedback from the SMARTS email notifications system. The feedback shows how well the opportunity-seekers within your institution are utilizing SMARTS. This allows you to determine whether your institution is reaping the full benefits of SMARTS, and make adjustments, if necessary.

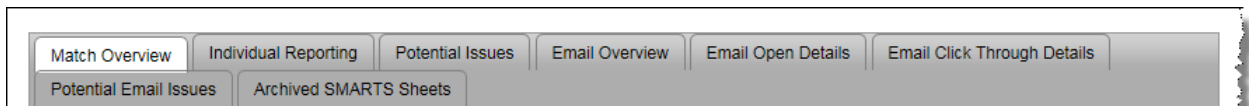
The **SMARTS Administration Option** is very detailed, and contains the following tabs:

- Match Overview, Section 14.4.1
- Individual Reporting, Section 14.4.2
- Potential Issues, Section 14.4.3
- Email Overview, Section 14.4.4
- Email Open Details, Section 14.4.5
- Email Click Through Details, Section 14.4.6
- Potential Email Errors, Section 14.4.7
- Archived SMARTS Sheets, Section 14.4.8

To access these features, hover your cursor over the **Administration Menu** of the toolbar, and move it down until the words “SMARTS Administration”, then click.



The tabs shown below will appear at the top of screen. The functions of each of these tabs are described fully in each subsection below. The white tab indicates the type of data you can access.



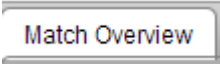
For example, from the tab pictured below, you would have access to data about “matches,” or how many actual funding opportunities matched the unique configurations created by SMARTS users at your institution.

14.4.1 Match Overview

This is the first tab under **Administration > SMARTS Administration**. By using Match Overview, administrators can track the following institution-wide activities:

- How many of their users have set up SMARTS email notifications;
- The total number of existing institution-wide SMARTS configurations; and,
- How many matches there have been between available grant opportunities and the institution’s SMARTS configurations.

Administrators can generate reports from custom timeframes that they control. Results are returned instantly, and are presented in a graphical format which can then be captured or printed locally.

Step 1 Click on  tab to begin.

The SMARTS Administration Match Overview Window (Figure 77) will appear in the tab.

Figure 77

SMARTS Administration—Match Overview Window

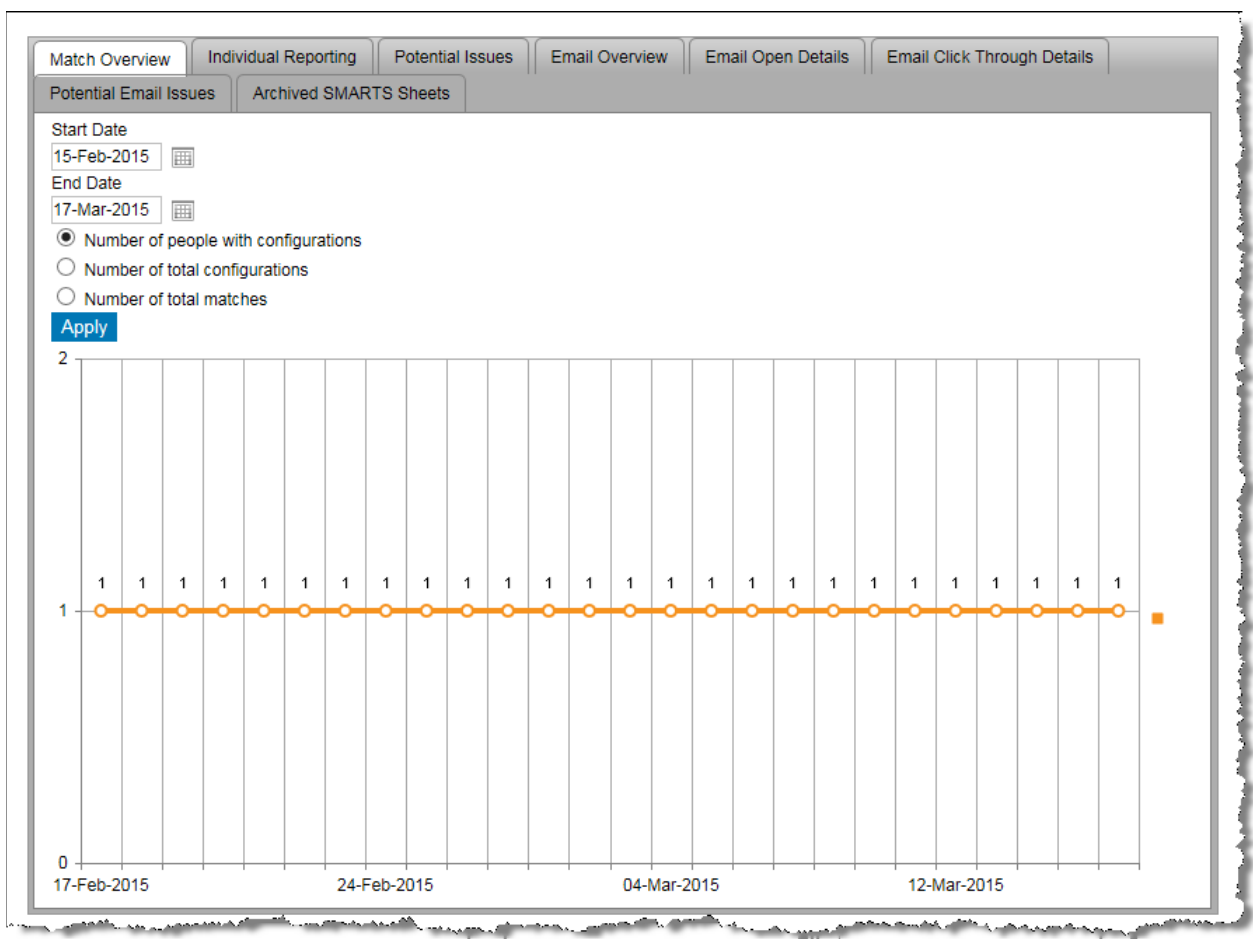


Figure 77 shows what a run query looks like on the Match Overview Page.

- ✓ In this example, the administrator wanted to find out how many SPIN users had SMARTS activated from February 15th, 2015 through March 17th, 2015.

14.4.1.1 Number of People With Configurations


To find out how many of your institution's SPIN users have activated SMARTS email notifications:

Step 1 Click on the “Number of people with configurations” bullet option.

- Number of people with configurations
- Number of total configurations
- Number of total matches

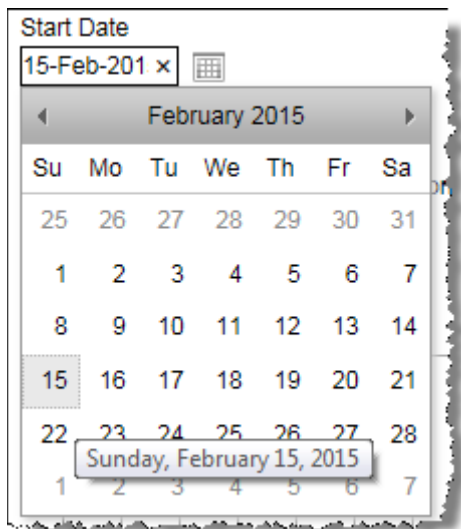
Choose a Timeframe for Your Results

Step 2 Enter the start date of your timeframe.

Start Date
01-Mar-2013 

Step 3 Click on the calendar icon and move your cursor over the date you want.

Step 4 When the desired date turns gray, click on it.



Alternatively, users can enter the start date of the timeframe by clicking directly into the field under “Start Date” and type the date.



Please Note

If you select the start or end date by typing it in, you must use the format shown in the Start Date box above: a two-digit month [hyphen] a three-letter month abbreviation [hyphen] and a four-digit year, with no spaces in between.

Step 5 Repeat the same procedure to select the end date for your query.

Step 6 To return a graphical depiction of your query, click on .



Please Note

After you run your Email Overview Query, if you navigate away from the window, the results will disappear. To capture the results, use a feature on your local computer (such as Print Screen). However, the same results are available at any time by running another query with the exact same parameters.

14.4.1.2 Number of Total Configurations


To find out how many SMARTS configurations are active across your entire institution:

Step 1 Click on the “Number of total configurations” bullet option.

- Number of people with configurations
- Number of total configurations
- Number of total matches

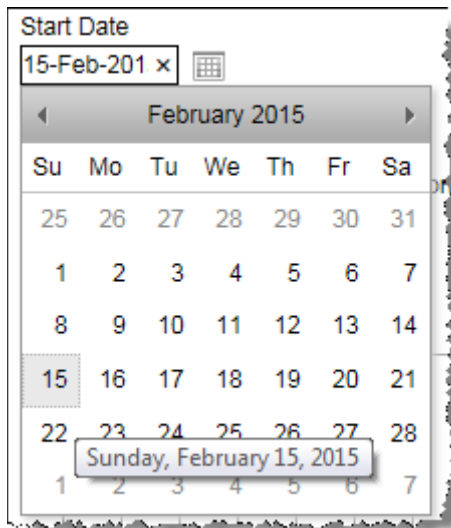
Choose a Timeframe for Your Results

Step 2 Enter the start date of your timeframe.

Start Date
 

Step 3 Click on the calendar icon and move your cursor over the date you want.

Step 4 When the desired date turns gray, click on it.



Alternatively, users can enter the start date of the timeframe by clicking directly into the field under “Start Date” and type the date.



Please Note

If you select the start or end date by typing it in, you must use the format shown in the Start Date box above: a two-digit month [hyphen] a three-letter month abbreviation [hyphen] and a four-digit year, with no spaces in between.

Step 5 Repeat the same procedure to select the end date for your query.

Step 6 To return a graphical depiction of your query, click on **Apply**.

14.4.1.3 Number of Total Matches


To find out how many SMARTS configurations in your institution were matched with actual funding opportunities:

Step 1 Click on the “Number of total matches” bullet option.

- Number of people with configurations
- Number of total configurations
- Number of total matches

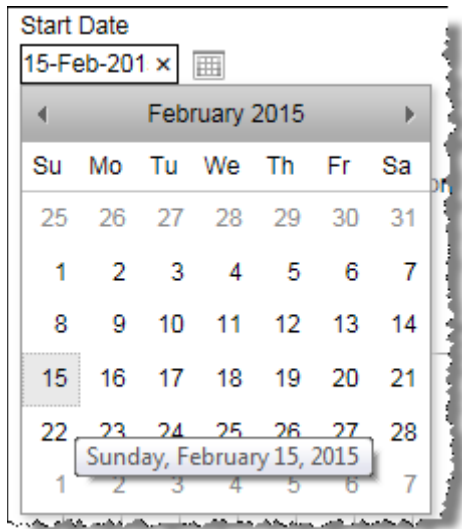
Choose a Timeframe for Your Results

Step 2 Enter the start date of your timeframe.

Start Date
 

Step 3 Click on the calendar icon and move your cursor over the date you want.

Step 4 When the desired date turns gray, click on it.



Alternatively, users can enter the start date of the timeframe by clicking directly into the field under “Start Date” and type the date.



Please Note

If you select the start or end date by typing it in, you must use the format shown in the Start Date box above: a two-digit month [hyphen] a three-letter month abbreviation [hyphen] and a four-digit year, with no spaces in between.

Step 5 Repeat the same procedure to select the end date for your query.

Step 6 To return a graphical depiction of your query, click on **Apply**.



Quick Tip

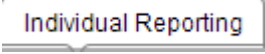
This feature of SMARTS Administration is useful for helping administrators assess how well grant opportunities are aligning with their users’ configurations—the overall goal is to identify how much the institution as a whole is benefitting from SMARTS, and whether or not there is a need to alter configurations in order to get better results.

14.4.2 Individual Reporting

This is the second tab under **Administration > SMARTS Administration**. By using Individual Reporting, administrators can track the following user-specific activities:

- The names of all users who have set up SMARTS email notifications, and details about the searches they have created;
- How many SMARTS configurations each particular user has established; and,
- The most recent date that each user received SMARTS notification of an opportunity which matched one or more of their configurations.

Administrators can group and filter Individual Reporting queries by various criteria to generate results that are most relevant to their concerns. For example, results can be grouped from the lowest to highest number of configurations, or alphabetically by name. Results can be filtered to search for a particular user’s activity. These features are described in more detail in the sections below.

Step 1 Click on  tab to begin.

The SMARTS Administration Individual Reporting Window (Figure 78) will appear in the tab.

Figure 78

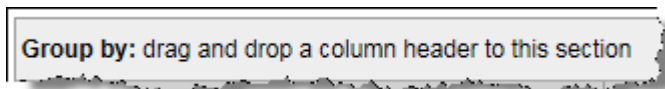
SMARTS Administration—Individual Reporting Window

Full name	Number of SMARTS Configurations	Last Matched Date
J Maroni	1	07-Aug-2014
Kyle Lake	3	25-Aug-2014
James Horner	1	16-Aug-2014
David Jetter	10	18-Mar-2014
William DeCocco	67	25-Aug-2014
Stanley Duncan	1	25-Aug-2014
Eddie Johnson	1	11-Jun-2014
Damian Davini	9	25-Aug-2014
Roger Wood	3	24-Aug-2014

14.4.2.1 Drag and Drop Group By Queries

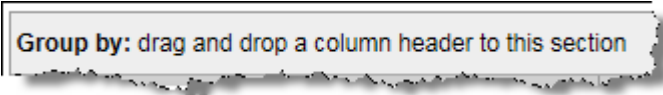
From the **Individual Reporting Window** shown in Figure 78, administrators can use a drag and drop feature to sort institution-wide information about multiple individual users. For example, results can be grouped from the lowest to highest number of configurations, or alphabetically by name.

The following appears in the upper, left-hand corner:



As an administrator, if you were interested in reviewing when all your users were last notified of matched opportunities via SMARTS, you would:

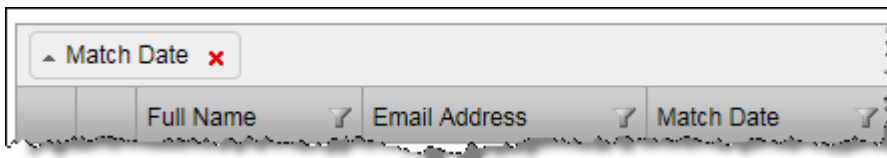
Step 1 Click and hold on  ..

Step 2 Drag it into the  area.

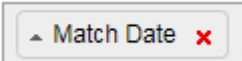
As you drag it over, it would look like this:



Step 3 Release the mouse button when a plus sign appears in front of the title of the column being dragged and two arrows appear to the left of “Group,” as shown above.



The header will then appear as shown above, with in place of the former **Group by:** instruction.

Step 4 Click on the right-hand corner of  to exit the Group By Function and return to the initial **Individual Reporting Window** (see Figure 78).



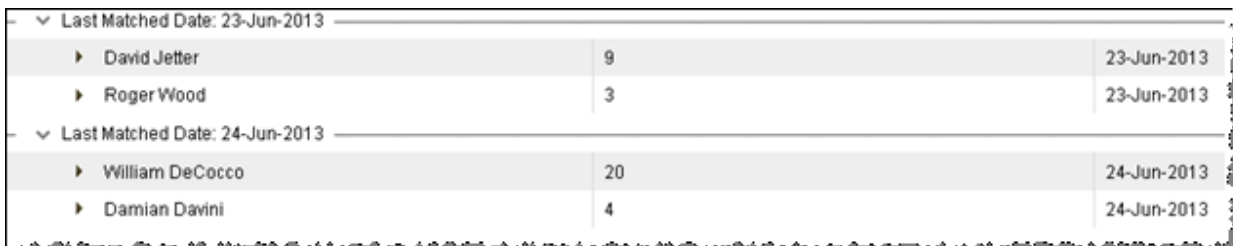
Please Note

These instructions should be repeated when dragging and dropping the other two columns (Full Name, and Number of SMARTS Configurations) to group Individual Reporting results.

14.4.2.2 Evaluating Group By Query Results

Last Matched Date

After dragging and dropping the Last Matched Date Header, the results shown in the initial **Individual Reporting Window** (see Figure 78) would now be grouped as shown below.



Last Matched Date: 23-Jun-2013		
▶ David Jetter	9	23-Jun-2013
▶ Roger Wood	3	23-Jun-2013
Last Matched Date: 24-Jun-2013		
▶ William DeCocco	20	24-Jun-2013
▶ Damian Davini	4	24-Jun-2013

The Last Matched Dates are in ascending order, and the names of all the institution’s users who had received SMARTS notifications of matches on each date are listed underneath.

In this Group By example, we learn that William DeCocco and Damian Davini were matched with opportunities more recently than David Jetter and Roger Wood were, and that their last matches happened on June 24th, 2013.

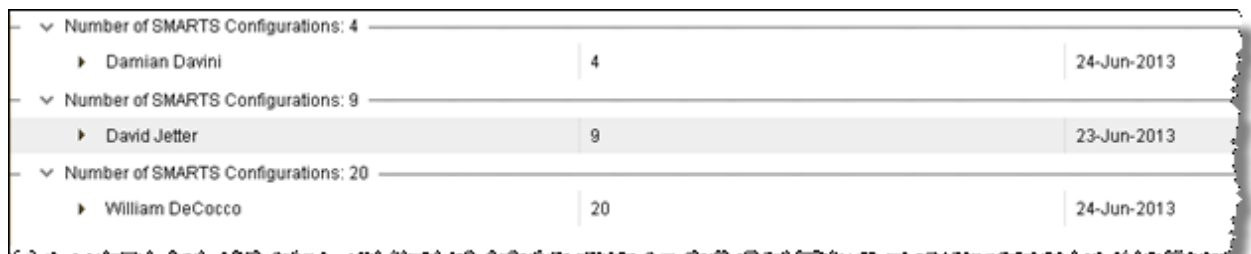
Number of SMARTS Configurations

As an administrator you could also group results relative to the Number of SMARTS Configurations by using the drag and drop instructions provided under the heading Drag and Drop Group By Queries.



A screenshot of a table header for a query titled "Number of SMARTS Configurations". The header has three columns: "Full name", "Number of SMARTS Configurations", and "Last Matched Date". Each column has a small downward-pointing arrow icon to its right, indicating that the columns are sortable.

This drag and drop action would result in a list that looks like this:



A screenshot of a table showing results grouped by the number of SMARTS configurations. The table is organized into three groups, each with a header row and one or more data rows. The groups are: 4 configurations (Damian Davini), 9 configurations (David Jetter), and 20 configurations (William DeCocco). The last matched dates are 24-Jun-2013, 23-Jun-2013, and 24-Jun-2013 respectively.

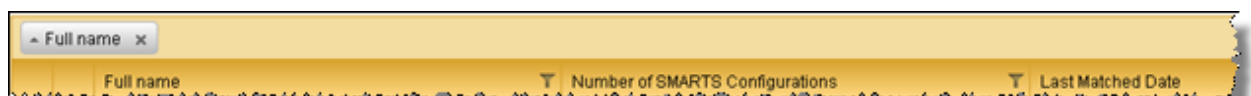
Number of SMARTS Configurations	Full name	Last Matched Date
4	Damian Davini	24-Jun-2013
9	David Jetter	23-Jun-2013
20	William DeCocco	24-Jun-2013

The Number of SMARTS Configurations are shown in ascending order, and the corresponding names of all the institution's users *who have that number of configurations* are shown beneath.

Therefore, in this Group By example, we learn that David Jetter has nine SMARTS configurations set up, which is more than Damian Davini, but less than William DeCocco. If there were additional users at this institution who also had nine configurations set up, their names would appear in the same group as David's.

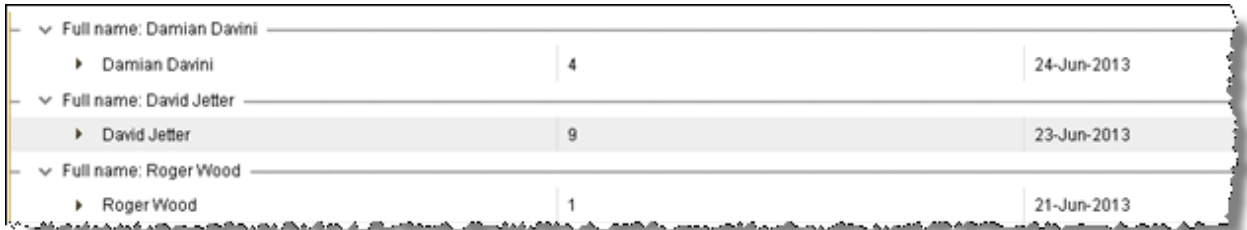
Full Name

As an administrator you can also group results relative to the names of the SMARTS users at your institution by using the drag and drop instructions previously provided.



A screenshot of a table header for a query titled "Full name". The header has three columns: "Full name", "Number of SMARTS Configurations", and "Last Matched Date". Each column has a small downward-pointing arrow icon to its right, indicating that the columns are sortable.

This drag and drop action would result in a list that looks like this:




Full name: Damian Davini		
▶ Damian Davini	4	24-Jun-2013
Full name: David Jetter		
▶ David Jetter	9	23-Jun-2013
Full name: Roger Wood		
▶ Roger Wood	1	21-Jun-2013

In this Group By example, the users' names are listed in ascending alphabetical order by first name. This is the default setting for this return.


To display the names in descending alphabetical order by first name, click on the arrow on the left-hand side of Full name.

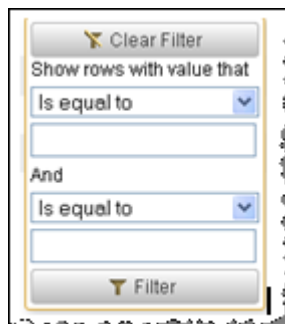
14.4.2.3 Using Filters to Customize Queries

Each column in the **Individual Reporting Window** (see Figure 78) has a filter function  attached to it. Administrators can filter Individual Reporting queries by various criteria to generate results that are most relevant to their concerns.

Full Name

Under the **Full Name Column**, the filter would be used to return information about a particular user in relation to SMARTS notifications. This provides administrators with the ability to quickly assess how often and how well a particular user is utilizing SMARTS.

Step 1 Click  on the right-hand side of the Full Name Column. The following box will appear:



Clear Filter


Show rows with value that

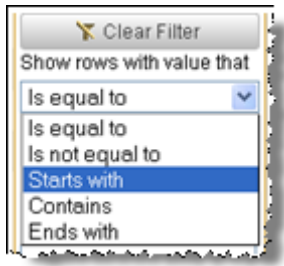
Is equal to

And

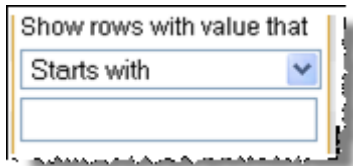
Is equal to

Filter

Step 2 Click on  next to the “Is equal to” field. The following pull-down menu will appear:

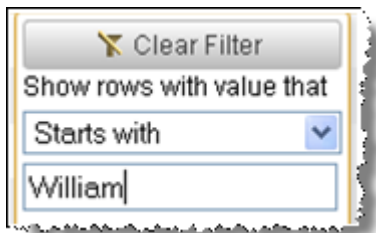



Step 3 Hover your cursor over your preferred option and click. The following will appear:



While using the filter feature under the Full Name Column you have the option of selecting “Starts with,” “Contains,” or “Ends with,” depending on which criteria you would like to utilize. In this example, we chose “Starts with.”

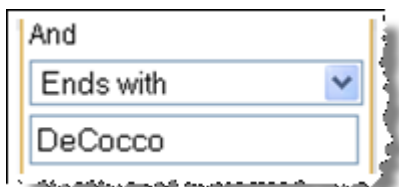
Step 4 Click into the empty field below “Starts with” and type the first name of the SMARTS user whose activity you are interested in assessing.



Step 5 Click  to return results.

If there are multiple users with the same first name at your institution, then use the next field to narrow your results.

Step 6 Enter the last name of the person you are interested in assessing.




Step 7 Click  to return results

The following results are returned showing:

- The name of the person(s) you entered into the filter fields;
- The number of SMARTS configurations he/she/they have in place; and,
- The last date an opportunity was matched to one or more of their configurations.

Group by: drag and drop a column header to this section		
Full name ▲	Number of SMARTS Configurations	Last Matched Date
▶ William DeCocco	20	24-Jun-2013

Step 8 Click  at any time to revert back to the initial Individual Reporting screen.



Please Note

These instructions should be repeated to choose different selections and combinations of selections from the two pull-down menus within the filter feature. You do not have to use both fields; you can use the first field as a stand-alone tool to filter your results.

14.4.2.4 Using the Details Arrow & Refresh Button

Next to each user's name within the Full Name Column there is a feature which allows administrators to see more details about which searches their institution's users have set up SMARTS Notifications for.

Group by: drag and drop a column header to this section		
Full name	Number of SMARTS Configurations	Last Matched Date
▶ Roger Wood	1	21-Jun-2013

- Click on ▶ next to a user's name. The arrow will now look like this: ▲ and details will appear, as shown below.


Search Name	Created Date	Date Last Used	Automated	Email Format	History
STEM Search	22-Apr-2013	22-Apr-2013	Daily	HTML	



Displaying items 1 - 1 of 1

Details revealed include:

- Search Name
- Created Date
- Date Last Used
- Frequency of SMARTS Notifications
- Format of SMARTS Notifications
- History of SMARTS Notifications

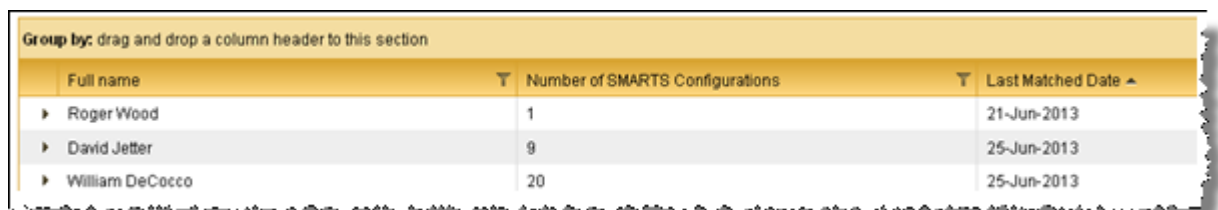
With the exception of the History Column, all of these columns and their associated features are described within Section 11.1—Saved Searches. The History Column is described below.

Step 1 Click on  to hide the details again.



A Refresh Button  is located in the lower, left-hand corner of the initial Individual Reporting Window, and the details view window. Clicking on this button has the same effect as clicking on  to hide the details.

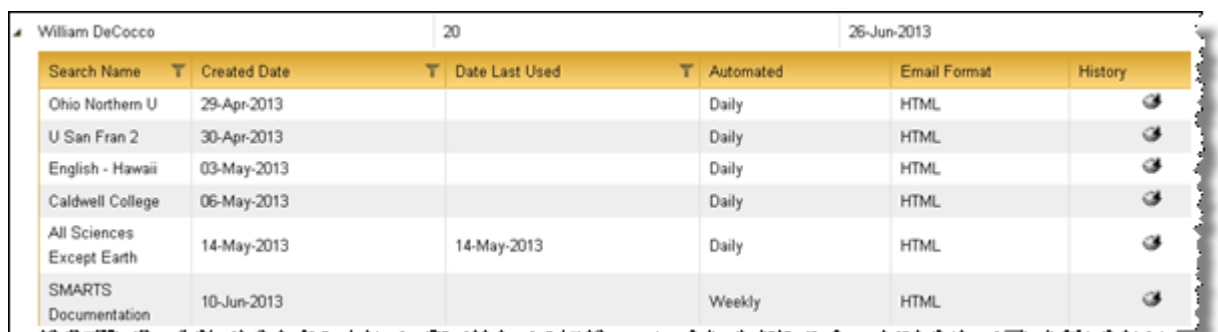
14.4.2.5 Using the History Feature Within The Details View







As an administrator, you can use the History Feature within the details view while working in the initial **Individual Reporting Window** (see Figure 78). This feature allows you to look at the SMARTS Configuration histories for any institution user.



Group by: drag and drop a column header to this section		
Full name	Number of SMARTS Configurations	Last Matched Date
▶ Roger Wood	1	21-Jun-2013
▶ David Jetter	9	25-Jun-2013
▶ William DeCocco	20	25-Jun-2013

Step 1 Click on  next to a user's name. The arrow will change to  and details will appear, as shown below.




Search Name	Created Date	Date Last Used	Automated	Email Format	History
Ohio Northern U	29-Apr-2013		Daily	HTML	
U San Fran 2	30-Apr-2013		Daily	HTML	
English - Hawaii	03-May-2013		Daily	HTML	
Caldwell College	06-May-2013		Daily	HTML	
All Sciences Except Earth	14-May-2013	14-May-2013	Daily	HTML	
SMARTS Documentation	10-Jun-2013		Weekly	HTML	

History

On the far right-hand side, you will see the following:

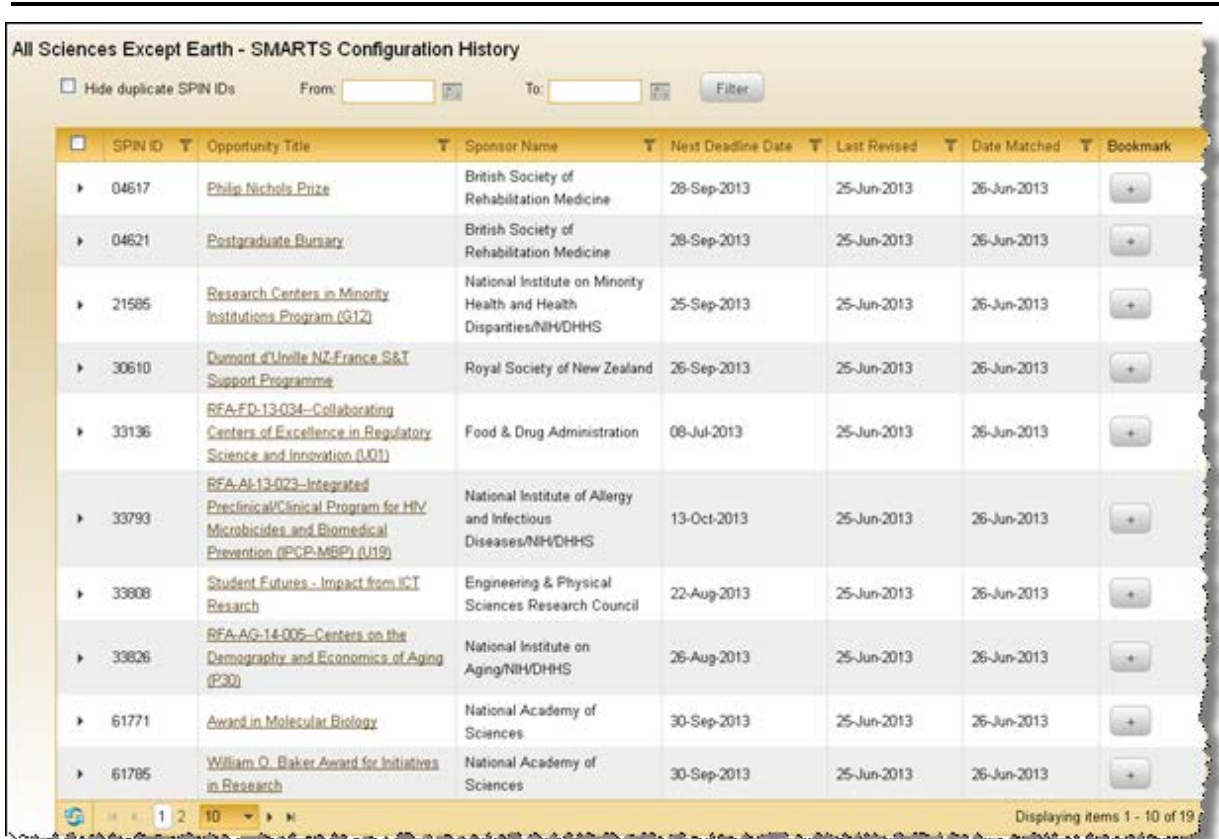
- ✓ In this example, we want to see what kind of SMARTS activity has been generated from William DeCocco's "All Sciences Except Earth" saved search.

Step 1 Click on  in the row of the search you want to review.



The **Smarts Configuration History Window** will open, as shown in Figure 79.

Figure 79 Individual Reporting Tab—SMARTS Configuration History Window

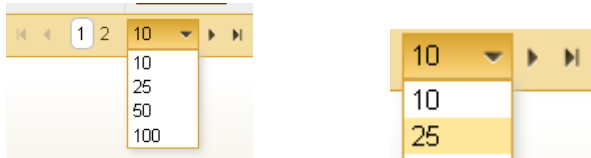


The screenshot shows the "All Sciences Except Earth - SMARTS Configuration History" window. It includes a "Hide duplicate SPIN IDs" checkbox, "From:" and "To:" date pickers, and a "Filter" button. Below is a table with columns for SPIN ID, Opportunity Title, Sponsor Name, Next Deadline Date, Last Revised, Date Matched, and Bookmark. The table contains 10 rows of data.

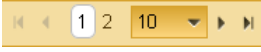
SPIN ID	Opportunity Title	Sponsor Name	Next Deadline Date	Last Revised	Date Matched	Bookmark
04617	Philip Nichols Prize	British Society of Rehabilitation Medicine	28-Sep-2013	25-Jun-2013	26-Jun-2013	+
04621	Postgraduate Bursary	British Society of Rehabilitation Medicine	28-Sep-2013	25-Jun-2013	26-Jun-2013	+
21585	Research Centers in Minority Institutions Program (G12)	National Institute on Minority Health and Health Disparities/NH/DHHS	25-Sep-2013	25-Jun-2013	26-Jun-2013	+
30610	Dumont d'Urville NZ/France S&T Support Programme	Royal Society of New Zealand	26-Sep-2013	25-Jun-2013	26-Jun-2013	+
33136	RFA-FD-13-034—Collaborating Centers of Excellence in Regulatory Science and Innovation (U01)	Food & Drug Administration	08-Jul-2013	25-Jun-2013	26-Jun-2013	+
33793	RFA-AI-13-023—Integrated Preclinical/Clinical Program for HIV Microbicides and Biomedical Prevention (PCP-MBP) (U19)	National Institute of Allergy and Infectious Diseases/NH/DHHS	13-Oct-2013	25-Jun-2013	26-Jun-2013	+
33808	Student Futures - Impact from ICT Research	Engineering & Physical Sciences Research Council	22-Aug-2013	25-Jun-2013	26-Jun-2013	+
33826	RFA-AG-14-005—Centers on the Demography and Economics of Aging (P30)	National Institute on Aging/NH/DHHS	26-Aug-2013	25-Jun-2013	26-Jun-2013	+
61771	Award in Molecular Biology	National Academy of Sciences	30-Sep-2013	25-Jun-2013	26-Jun-2013	+
61785	William O. Baker Award for Initiatives in Research	National Academy of Sciences	30-Sep-2013	25-Jun-2013	26-Jun-2013	+

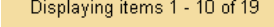
You can control how many histories appear on your **SMARTS Configuration History Window** at any given time.


Step 2 Click on the pull-down number menu in the lower, left-hand corner of the screen.



Step 3 Hover and click on the desired number when it turns color.

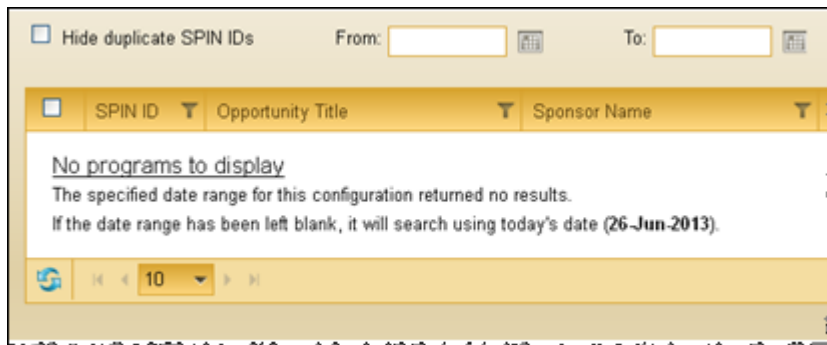
Step 4 Click on the arrows in the lower, left-hand corner of the screen to toggle between different pages of results .

We now can see by looking at the bottom, right-hand corner  of Figure 79 that “All Sciences Except Earth” was matched with 19 relevant opportunities *on the day we accessed the history, in this case June 26th, 2013.*


This means that William will receive 19 SMARTS Notifications on either June 26th or within a week of the matched date, depending on how he set up his SMARTS Notifications preferences. The SMARTS Notifications preferences are shown in the initial **Individual Reporting Window** when you click on  next to the user’s name.

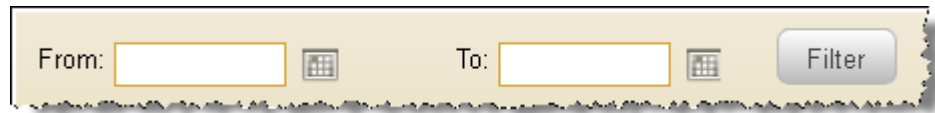
❖ See also the **Using the Details Arrow & Refresh Button** section above.

Step 5 You must enter a date range (see below) or the returned histories default to the current day, as the message box below explains.



This box would appear if there were no matches to our selected search on the current day, and if we had not selected another date range to assess.

The **Smarts Configuration History Window** contains a  to allow administrators to pull histories for any date or ranges of dates they choose.



Step 6 Click on the  next to the empty From Field. The current month's calendar appears.




✓ In this example, we are going to assess the SMARTS Configuration History of “All Sciences Except Earth”  .

Step 1 Click on the arrow to the left of the month and year header to toggle backwards to the desired month.



Step 2 Hover over the desired starting date for the filter. Then click.



Step 3 Click on the  next to the To Field, and repeat the instructions to select an end date for the filter.

Applying these date filters resulted in 131 histories being returned:
The first few are shown below.

Displaying items 1 - 10 of 131



The screenshot shows a table titled "All Sciences Except Earth - SMARTS Configuration History". At the top, there are filters for "From: 01-Jan-2013" and "To: 01-Jun-2013", along with a "Filter" button and a "Hide duplicate SPIN IDs" checkbox. The table has the following columns: SPIN ID, Opportunity Title, Sponsor Name, Next Deadline Date, Last Revised, Date Matched, and Bookmark. Five rows are visible, each with a right-pointing arrow in the SPIN ID column and a plus sign in the Bookmark column.

SPIN ID	Opportunity Title	Sponsor Name	Next Deadline Date	Last Revised	Date Matched	Bookmark
00710	Ruth L. Kirschstein National Research Service Awards (NRSA) for Individual Predoctoral Fellows in Pharm/DrPhD Programs (F31)	National Institute of General Medical Sciences/NIH/DHHS	08-Aug-2013	30-May-2013	31-May-2013	+
01093	Prostate Cancer Research Program- Transformative Impact Award	Department of the Army		14-May-2013	15-May-2013	+
01096	Indo-US Bilateral Workshops/Symposia/Conferences	Indo-US Science & Technology Forum	15-Aug-2013	31-May-2013	01-Jun-2013	+
01387	Distinguished Scientist Award	American College of Cardiology	20-Sep-2013	23-May-2013	24-May-2013	+
01613	Research Associateship Programs -- Federal Highway Administration	National Research Council	01-Aug-2013	16-May-2013	17-May-2013	+

Now that we have filtered our SMARTS Configuration History with specific date parameters, the data in the Last Revised and Date Matched Columns are no longer defaulted to today's date (see above).

It is not possible to generate an automatic, all-inclusive history of a SMARTS Configuration for a particular saved search. *A date range must be entered by the administrator who is assessing the history.*

By looking at the **Last Revised** Column we can see the dates of when InfoEd Global was last in contact with the relevant agency for each opportunity. Each opportunity's information was updated in the InfoEd Global database on the corresponding date in that row.

- ✓ In this example, the program information for SPIN ID# 01387—Distinguished Scientist Award, was last updated in the InfoEd Global database on May 23rd, 2013.

By looking at the **Date Matched** Column, we can see the date that the user was sent the updated opportunity via SMARTS Notification. Typically, the user is notified on the day after the program is revised.

- ✓ In this example, William was notified via SMARTS on May 24th, 2013 (or within a week thereof), about the Distinguished Scientist Award opportunity (either as a new or updated opportunity).

14.4.2.6 Hiding Duplicate SPIN IDs

Sometimes duplicate SPIN ID Numbers appear within the **SMARTS Configuration History Window** (Figure 79). This means that the program was modified (i.e., its name was changed or it was re-introduced by the Sponsor).

- To hide duplicates, click in the box located on the upper, left-hand side of the page Hide duplicate SPIN IDs .
- ✓ In this example, the number of returned histories decreased from 131 to 129 Displaying items 1 - 10 of 129 . *No data was “lost” from the returned histories.*

14.4.2.7 The Bookmark Column



The **SMARTS Configuration History Window** contains a Bookmark Feature in the upper, right-hand corner.



It is meant to link the user to the customized bookmark features of the software.

- ❖ See Section 9.6—Bookmarking Opportunities

14.4.2.8 The Refresh Button

The **SMARTS Configuration History Window** contains a Refresh Button  in the lower, left-hand corner. Clicking on this button has the same effect as clicking on  to hide the details.

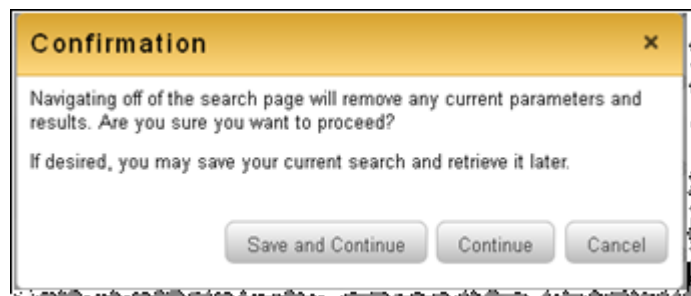
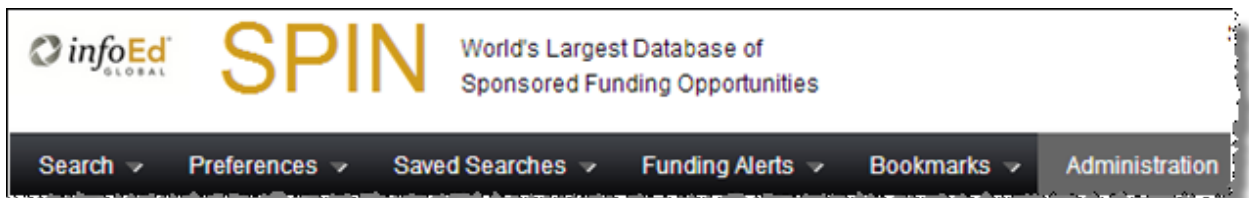
- ❖ See also the ***Using the Details Arrow & Refresh Button*** section above.

14.4.2.9 Using Column Filters

- ❖ See the **Using Filters to Customize Queries** section above.
- ❖ See Section 9.5.10—Filtering Results


14.4.2.10 Exiting the SMARTS Configuration History Window

After using the **SMARTS Configuration History Window**, when you click on any of the other SPIN Menus shown below, the following popup Confirmation Box will appear.



Step 1 Click  to save your search parameters.

- ❖ See Section 5.1.5—Saving Search Parameters, for more information.

OR Click  to exit your returned histories page without saving parameters.


OR Click  or click on  to stay on the current page.

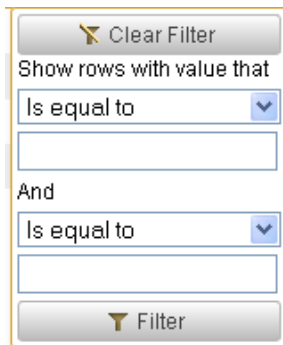
14.4.2.11 Number of SMARTS Configurations

Administrators can filter Individual Reporting queries by various criteria to generate results that are most relevant to their concerns. Under the Number of Smarts Configurations Column, the filter helps return information about how many SMARTS Configurations are in place institution-wide, and relative to particular users. For example, as an administrator using this filter you could find out:


- How many and which users have a particular number of configurations;
- How many and which users have a particular range of numbers of configurations; and,
- How many and which users have a number of configurations above or below a particular target.

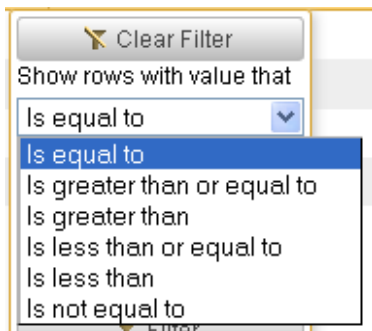
This provides administrators with a clearer picture of how well SMARTS is being utilized, a sense of the average amount of use, and the ability to quickly see who is using SMARTS relative to particular targets set at the institution.

Step 1 Click  on the right-hand side of the Number of SMARTS Configurations Column. The following box will appear:



A filter dialog box with a grey border. At the top is a button labeled "Clear Filter" with a yellow filter icon. Below it is the text "Show rows with value that". Underneath is a dropdown menu currently set to "Is equal to" with a blue arrow pointing down. Below the dropdown is an empty text input field. Underneath that is the word "And". Below "And" is another dropdown menu also set to "Is equal to" with a blue arrow pointing down. Below this second dropdown is another empty text input field. At the bottom of the dialog is a button labeled "Filter" with a yellow filter icon.

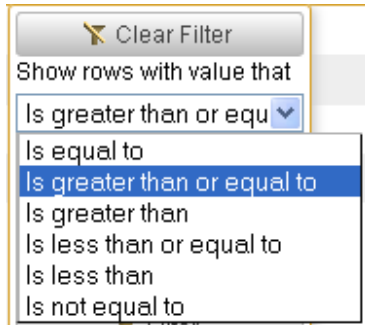
Step 2 Click on  next to the "Is equal to" Field. The following pull-down menu will appear:



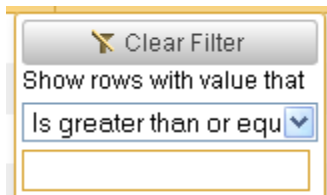
A filter dialog box with a grey border, showing a pull-down menu. At the top is a button labeled "Clear Filter" with a yellow filter icon. Below it is the text "Show rows with value that". Underneath is a dropdown menu currently set to "Is equal to" with a blue arrow pointing down. The pull-down menu is open, showing a list of options: "Is equal to" (highlighted in blue), "Is greater than or equal to", "Is greater than", "Is less than or equal to", "Is less than", and "Is not equal to". Below the dropdown is an empty text input field. At the bottom of the dialog is a button labeled "Filter" with a yellow filter icon.

While using the filter feature under the Number of Smarts Configurations Column users have the option of selecting from six comparative criteria, as shown in the image above.

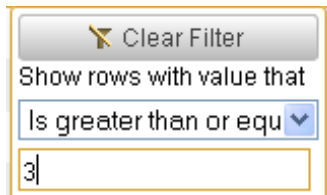
Step 3 Hover your cursor over your preferred option, then click.



- ✓ In this example, we chose “Is greater than or equal to,” and the resulting box appeared:



Step 4 Click into the empty field below “Is greater than or equal to” and type a number that corresponds to the parameters you are seeking information about.



- ✓ In this example, we are interested in finding out how many institution users have more than three configurations. So the number three is typed into the field, as shown above.

Step 5 Click  to return results.

- ✓ In this example they would appear as shown below.

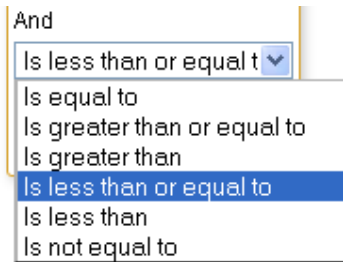
Group by: drag and drop a column header to this section			
	Full name	Number of SMARTS Configurations	Last Matched Date
▶	David Jetter	9	25-Jun-2013
▶	William DeCocco	20	25-Jun-2013
▶	Damian Davini	4	25-Jun-2013
▶	Roger Wood	3	25-Jun-2013

The user who had only one configuration has disappeared from the return screen. The rest of our users had three or more configurations, and thus are shown here.

Now let's enter another parameter to further limit your returns.

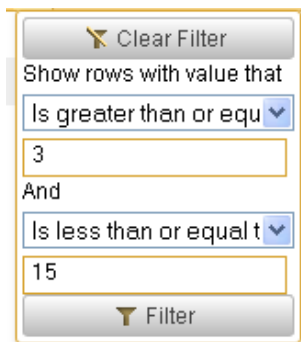
- ✓ In this example, we only want to see those users who have three or more configurations, but no more than another number.

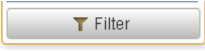
Step 1 Hover your cursor over "Is less than or equal to," and click.



Step 2 Click into the empty field below your selection and type a number that corresponds to the parameters you are seeking information about.


- ✓ In this example, we are interested in finding out how many institution users have three or more configurations, but 15 or less. So, the number 15 is typed into the field, as shown below.



Step 3 Click  to return results

The following results are returned showing only those SPIN SMARTS users who have between three and 15 configurations set up:

Group by: drag and drop a column header to this section			
Full name	Number of SMARTS Configurations	Last Matched Date	
▶ David Jetter	9	25-Jun-2013	
▶ Damian Davini	4	25-Jun-2013	
▶ Roger Wood	3	25-Jun-2013	

Step 4 Click  at any time to revert back to the initial **Individual Reporting Window** (Figure 78).



Please Note


These instructions should be repeated to choose different selections and combinations of selections from the two pull-down menus within the filter feature. You do not have to use both fields; you can use the first field as a stand-alone tool to filter your results.

Last Matched Date

Administrators can filter Individual Reporting queries by various criteria to generate results that are most relevant to their concerns. Under the Last Matched Date Column, the filter returns specific information about when searches with SMARTS activated were last matched with opportunities. For example, as an administrator using this filter you could find out:


- How many and which users can be expected to receive SMARTS notifications as a result of matches that occurred on a particular date; and,
- How many and which users have, or will receive, SMARTS notifications for any desired range of dates.

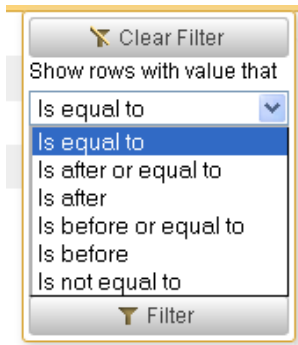
This provides administrators with a clearer picture of how often SMARTS is sending matches to users' inboxes, as well as a sense of the average amount of notifications within given timeframes—for example, during a particularly busy time of year for opportunities.

Step 1 Click  on the right-hand side of the Last Matched Date Column. The following box will appear:

The filter dialog box contains the following elements:

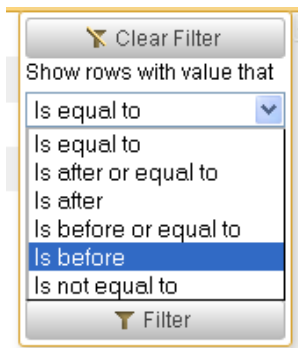
- A "Clear Filter" button at the top.
- A label "Show rows with value that" above a dropdown menu set to "Is equal to".
- An empty text input field with a calendar icon to its right.
- The word "And" below the first field.
- Another dropdown menu set to "Is equal to".
- A second empty text input field with a calendar icon to its right.
- A "Filter" button at the bottom.

Step 2 Click on  next to the “Is equal to” Field. The following pull-down menu will appear:

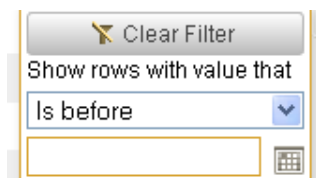





While using the filter feature under the Last Matched Date Column you have the option of selecting from six comparative criteria, as shown in the image above.

Step 3 Hover your cursor over your preferred option, then click.

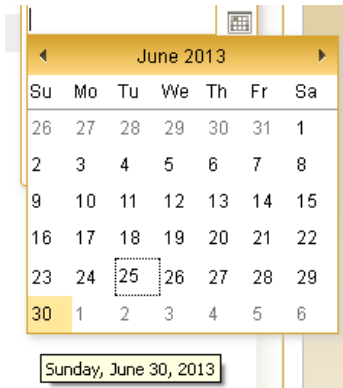


In this example, we chose “Is before,” and the resulting box appeared:



Step 4 Click into  icon next to the empty field below “Is before,” and use the calendar to select a date. Use the  and  to select the month you want. Then hover your cursor over the day you want. As you hover, the date will appear below the calendar, which allows you to confirm your choice.

Step 5 Click when you have confirmed your chosen date.



Alternately, you may type the preferred date into the empty field using the following format: ##-Mon-YEAR; with the day, followed by the month, then the year.

For example, we are interested in matches that occurred before June 30th, 2013—this would be manually typed as 30-Jun-2013.

Step 6 Click  to return results, as shown below.


Group by: drag and drop a column header to this section			
Full name	Number of SMARTS Configurations	Last Matched Date	
▶ Roger Wood	1	21-Jun-2013	
▶ David Jetter	9	25-Jun-2013	
▶ William DeCocco	20	25-Jun-2013	
▶ Damian Davini	4	25-Jun-2013	
▶ Roger Wood	3	25-Jun-2013	

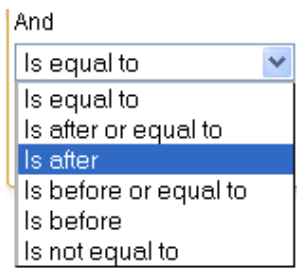
- ✓ In this example, the screen did not change from the initial **Individual Reporting Window** (Figure 78) because all of the last matched dates fell before June 30th, 2013.

Now let's enter another parameter to further limit your returns:

- ✓ In this example, we only want last matched dates before June 30th, but after June 24th, 2013.


✓ **Step 1**

Click on  next to the "Is equal to" field. The following pull-down menu will appear:



Step 2 Click on “Is after” to choose this parameter.

Step 3 Follow the instructions provided above to enter June 24th, 2013.

Step 4 Click  to return results.


The following results are returned showing matches that occurred between June 24th and June 30th, 2013.

Group by: drag and drop a column header to this section			
Full name	Number of SMARTS Configurations	Last Matched Date	
▶ David Jetter	9	25-Jun-2013	
▶ William DeCocco	20	25-Jun-2013	
▶ Damian Davini	4	25-Jun-2013	
▶ Roger Wood	3	25-Jun-2013	



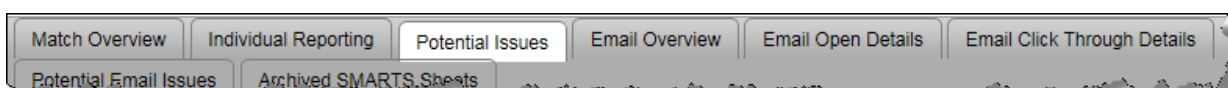
Please Note

These instructions should be repeated to choose different selections and combinations of selections from the two pull-down menus within the filter feature. You do not have to use both fields; you can use the first field as a stand-alone tool to filter your results.

Step 5 Click  at any time to revert back to the initial **Individual Reporting Window**.

14.4.3 Potential Issues

This is the third tab under **Administration > SMARTS Administration**.



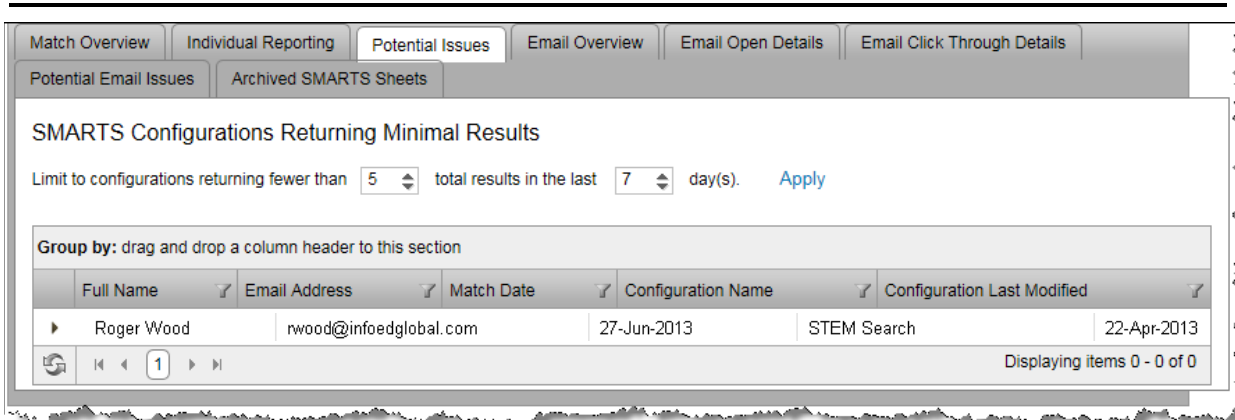
Administrators can assess which searches that have SMARTS activated may need to be re-configured or discarded due to a low number of returned opportunities by:

- Choosing a minimum search performance (number of matched opportunities) level;
- Establishing a timeframe for expected results; and,
- Sorting institution-wide results to generate feedback about which searches or users have a recent history of low performance.

Step 1 Click on **Potential Issues** to begin.

The resulting screen is depicted in Figure 80 below. SPIN defaults to five total results in the last seven days; results from those parameters appear automatically when administrators first access the screen.

Figure 80 SMARTS Administration—Potential Issues Window



Based on their field of work and professional experience, administrators can choose a target number which they find to be a reasonable number of returned matched opportunities. They can then search for results below that target.

- ✓ In this example, we are going to look for users whose activated SMARTS searches have returned fewer than five results during the last two days.

Step 2 Click on the up or down arrows in the area shown below until the number you want appears.

Limit to configurations returning fewer than total results


Next we will enter the timeframe for the assessment.

Step 3 Click on the up or down arrows in the area shown below until the number you want appears.

in the last day(s).

Keep in mind that the goal is to find those users whose searches are performing *very* poorly. The higher the number of days is, the less chance there would be users and associated searches returned.

Step 4 Click  to obtain your results.

Limit to configurations returning fewer than total results in the last day(s). 

Group by: drag and drop a column header to this section

	Full Name	Email Address	Match Date	Configuration Name	Configuration Last Modified
▶	David Jetter	djetter@infoed.org	27-Jun-2013	Cancer Radiation	16-Jul-2012
▶	Damian Davini	DDavini@infoed.org	27-Jun-2013	Undergraduate Travel	15-May-2012
▶	Roger Wood	rwood@infoedglobal.com	27-Jun-2013	STEM Search	22-Apr-2013

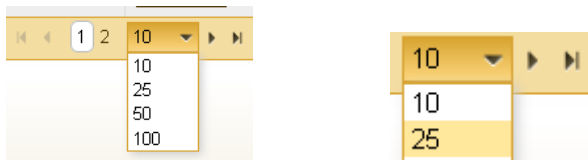
« 1 » Displaying items 1 - 3 of 3

- ✓ In this example, three different users and searches were returned. David, Damian, and Roger each have a SMARTS-enabled search configuration that has not been matched with more than five opportunities over the last two days.


You can control how many results appear on your **Potential Issues Window** (Figure 80) at any given time.

Displaying items 1 - 3 of 3

Step 1 Click on the pull-down number menu in the lower, left-hand corner of the screen.



Step 2 Hover and click on the desired number when it turns yellow.

Step 3 Click on the arrows in the lower, left-hand corner of the screen to toggle between different pages of results .

In addition to user names and search configuration names, the following information is provided for administrators' use:

- Users' email addresses;
- Dates of matches; and,
- Dates that configurations were last modified.

14.4.3.1 Drag and Drop Group By Queries

The **Potential Issues Window** contains a Group By Feature. Administrators can use this drag and drop feature to sort institution-wide information about multiple individual users.

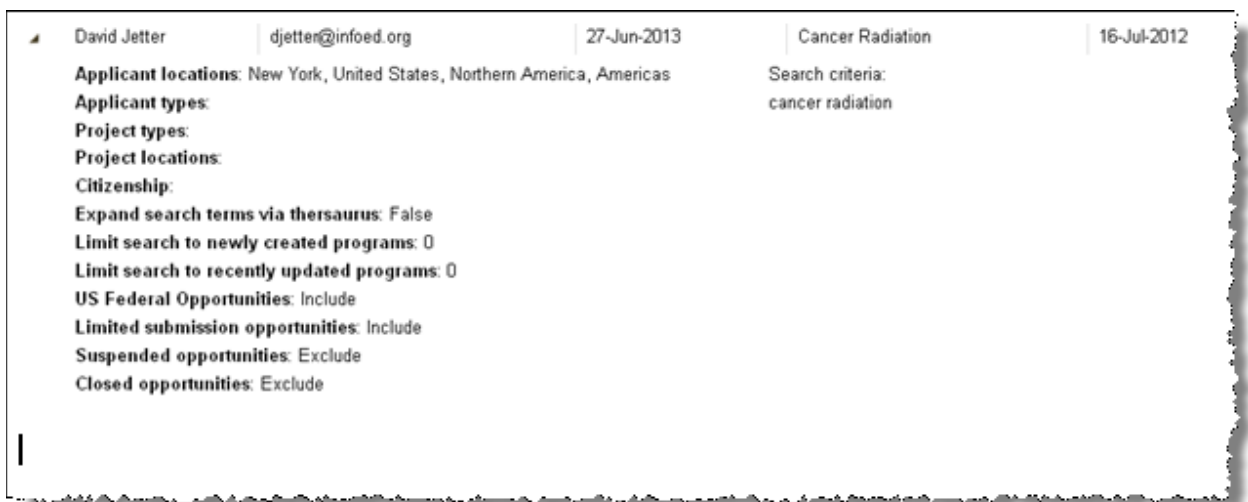
- ❖ See the section of the same name within Section 14.4.2—Individual Reporting.

When administrators drag and drop a column into the Group By Area, the resulting screen will default back to five total results in the last seven days. To reset the parameters, follow the instructions provided above.

14.4.3.2 Using the Details View

As an administrator, you can use the Details View Feature while working in the SMARTS Configurations Returning Minimal Results Area. This feature allows you to look at the specific criteria of poorly performing searches.



Step 1 Click on ► next to a user's name. The arrow will change to ▲ and details will appear, as shown below. Click on ▲ again to hide the details.



The revealed details are those Category Filters and Search Options that were set up by the user in their initial Saved Search.

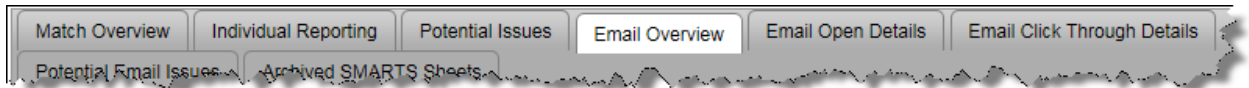
- ❖ See Section 10.1, Category Filters
- ❖ See Section 10.2, SPIN Preference Menu Search Options

14.4.3.3 The Refresh Button

The **Potential Issues Searches Window** (Figure 80) contains a Refresh Button  in the lower, left-hand corner. Clicking on this button has the same effect as clicking on  to hide the details.

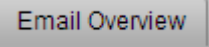
14.4.4 Email Overview

This is the fourth tab under **Administration > SMARTS Administration**.



Administrators can assess whether or not their institution's users are capitalizing on SMARTS Email Notifications by:

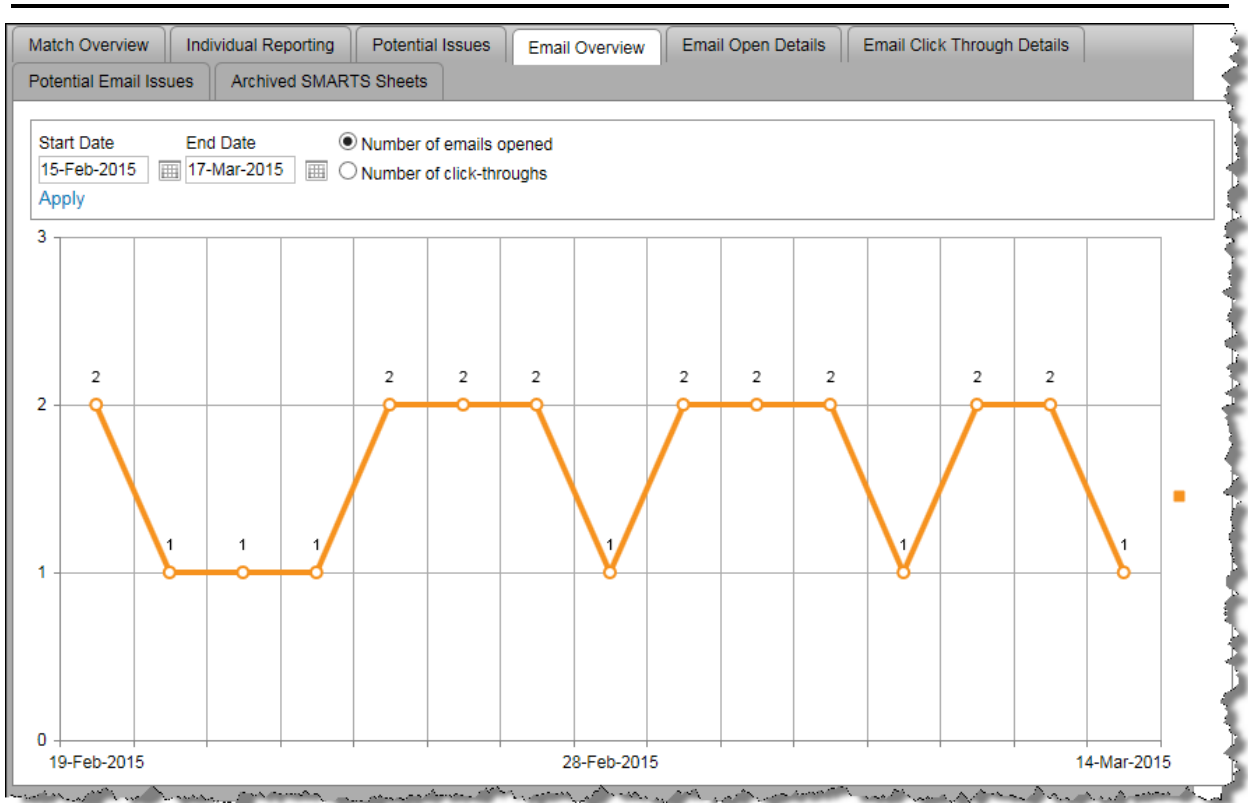
- finding out how many SMARTS Email Notifications were opened by users;
- finding out whether users clicked on hyperlinks within the emails; and,
- setting timeframes for their assessments of these activities, to generate an understanding of how well SMARTS is being utilized over time.

Step 1 Click on  to begin.

The resulting screen is depicted in Figure 81 below (graph will vary). SPIN defaults to today's date for its End Date, with a start date of one month earlier. It also defaults to the "Number of emails opened" bullet option when the page is first accessed. These parameters can be changed by administrators (see below).

Figure 81

SMARTS Administration—Email Overview Window



14.4.4.1 Number of Emails Opened

To find out how many SMARTS Email Notifications have been opened by your institution's SPIN users who have SMARTS activated:


Step 1 Click on the "Number of emails opened" bullet option.

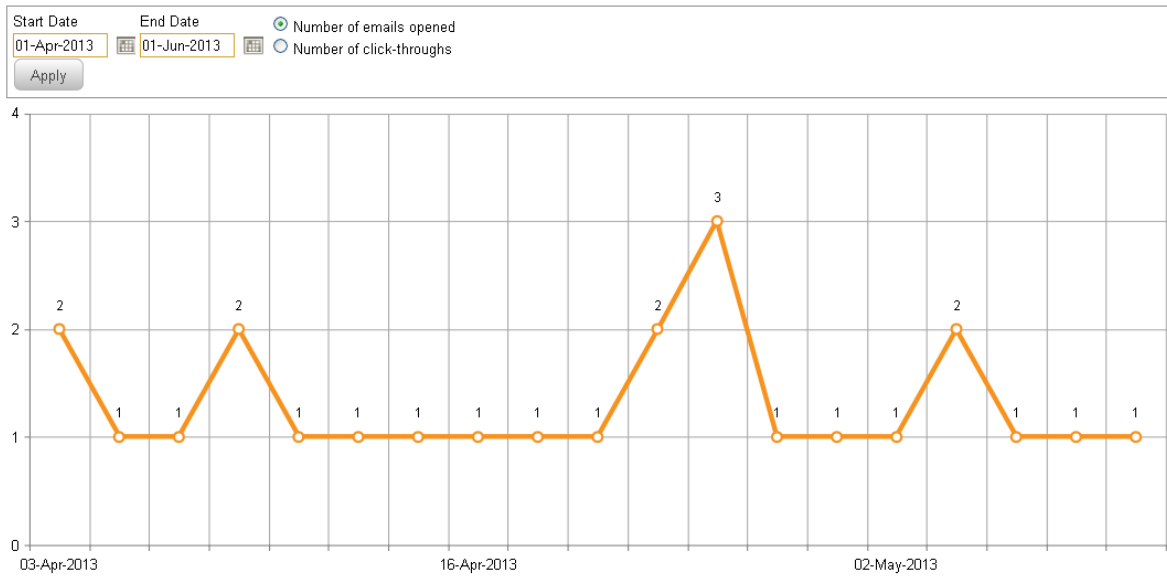
- Number of emails opened
- Number of click-throughs

Choose a Timeframe for Your Results

- ❖ See the section of the same name within Section 14.4.1—Match Overview, for instructions.
- ✓ In this example, we want to find out how many SMARTS Email Notifications were opened by users from April 1st through June 1st, 2013.

Start Date End Date
01-Apr-2013 01-Jun-2013

Step 2 Click  to return a graphical depiction of your query.



The results show that among this institution’s five users (see Section 14.4.2—Individual Reporting), from April 1st to June 1st, 2013, the maximum number of SPIN SMARTS users who opened their email notifications was three.

14.4.4.2 Number of Click-Throughs

To find out how many of your institution’s users clicked on linked features in their SMARTS Notifications Emails:

Step 1 Click on the “Number of click-throughs” bullet option.


- Number of emails opened
- Number of click-throughs

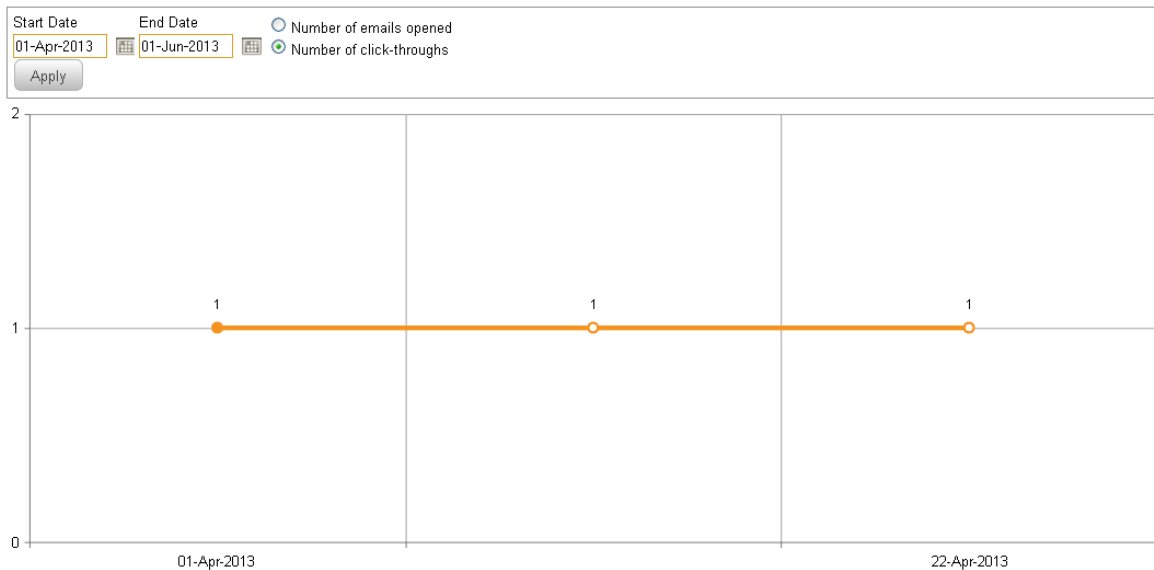
Choose a Timeframe for Your Results

- ❖ See the section of the same name within Section 14.4.1—Match Overview, for instructions.

- ✓ In this example, we want to find out how many times users clicked on links in their SMARTS Email Notifications from April 1st, 2013 through June 1st, 2013.

Start Date End Date
01-Apr-2013 01-Jun-2013

Step 2 Click  to return a graphical depiction of your query.



The results show that among this institution’s five users (see Section 14.4.2—Individual Reporting), from April 1st to June 1st, 2013, one user clicked on links that were included in the SMARTS Email Notifications.



Please Note

After you run your Email Overview Query, if you navigate away from the window, the results will disappear. To capture the results, use a feature on your local computer (such as Print Screen). The same results are available at any time by running another query with the exact same parameters.

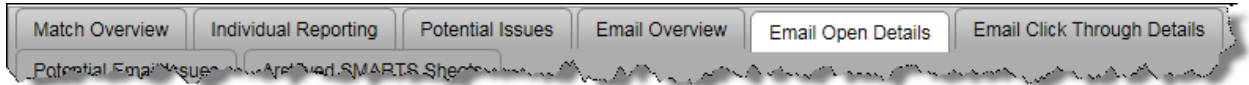


Quick Tip

You can set the timeframe of your query using any one of the two bullet options (Number of emails opened and Number of click-throughs), and toggle between the query results without having to re-set the timeframe. Just click the Apply button after toggling to a new bullet option.

14.4.5 Email Open Details

This is the fifth tab under **Administration > SMARTS Administration**.



Using this feature, administrators can:

- Assess how many SMARTS Notifications are being opened by each particular user;
- See the names and dates of the most recently opened configurations; and,
- Group and filter the information by name, or by number of “opens.”

Step 1 Click on **Email Open Details** to begin.

The resulting screen is depicted in Figure 82 below.

Figure 82 SMARTS Administration—Email Open Details Window

A screenshot of the 'Email Open Details' window. At the top, there are navigation tabs: Match Overview, Individual Reporting, Potential Issues, Email Overview, Email Open Details (selected), and Email Click Through Details. Below these are two sub-tabs: Potential Email Issues and Archived SMARTS Sheets. The main content area contains a table with the following data:

Drag a column header and drop it here to group by that column			
Full name	Number of Opens	Opened Date	Name of configuration last opened
Kyle Lake	0		
David Jetter	0		
Keith Willis	1	03-Apr-2013	SMARTS Test1
Roger Wood	18	23-Aug-2014	US Federal
Roger Wood	4	27-Feb-2014	STEM Search
Damian Davini	152	24-Aug-2014	Grains
William DeCocco	2	29-Apr-2014	Limited Submissions
J Maroni	1	07-Aug-2014	Bacon
James Horner	0		
Eddie Johnson	1	11-Jun-2014	Multiple Sclerosis
Stanley Duncan	0		

At the bottom of the table, there is a pagination control showing '1' and 'Displaying items 1 - 11 of 11'.

14.4.5.1 Drag and Drop Group By Queries

Administrators can group their query results by user name, or by number of “opens.”

- ❖ See the section of the same name within Section 14.4.2—Individual Reporting
- ❖ See also Section 5.3.1.3—Sorting Results

14.4.5.2 Evaluating Group By Queries

Administrators can assess information from grouped queries in a way that is most relevant to their concerns.

- ✓ See the section of the same name within Section 14.4.2—Individual Reporting

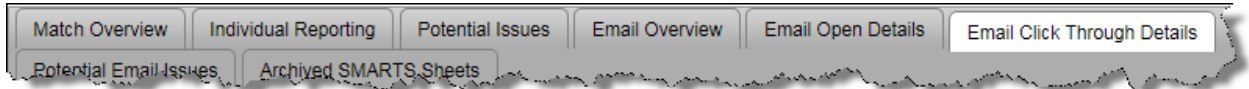
14.4.5.3 Using Filters to Customize Queries

Administrators can filter information in both the Full Name and Number of Opens Columns in a way that is most relevant to their concerns.

- ❖ See the section of the same name within Section 14.4.2—Individual Reporting
- ❖ See also Section 9.5.10—Filtering Results

14.4.6 Email Click Through Details

This is the sixth tab under **Administration > SMARTS Administration**.



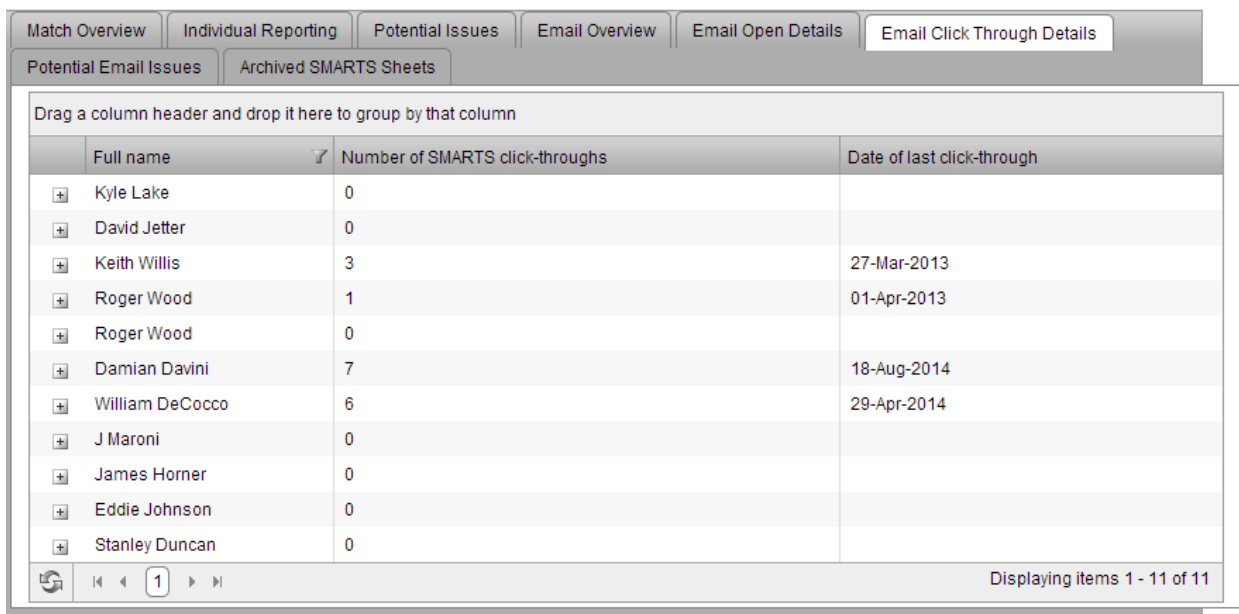
Using this feature, administrators can:

- Assess how many users are clicking on links provided by SMARTS;
- See the user names and dates of most clicked-through notifications; and,
- Group and filter the information by user name.

Step 1 Click on **Email Click Through Details** to begin.

The resulting screen is depicted in Figure 83 below.

Figure 83 SMARTS Administration—Email Click-Through Details Window



Drag a column header and drop it here to group by that column			
	Full name	Number of SMARTS click-throughs	Date of last click-through
+	Kyle Lake	0	
+	David Jetter	0	
+	Keith Willis	3	27-Mar-2013
+	Roger Wood	1	01-Apr-2013
+	Roger Wood	0	
+	Damian Davini	7	18-Aug-2014
+	William DeCocco	6	29-Apr-2014
+	J Maroni	0	
+	James Horner	0	
+	Eddie Johnson	0	
+	Stanley Duncan	0	

As shown in Figure 83, administrators can see the names of all the users at their institution who receive SMARTS Email Notifications, and the corresponding number of times each user has clicked on a linked feature within the notifications.



Please Note

If a user has not opted to receive HTML format emails, they would not be able to click through elements within the SMARTS Notifications. In this case, the number of click throughs would show up as zero, even if they reviewed each notification they received.

14.4.6.1 Using the Details View

As an administrator, you can use the Details View Feature while working in the **Email Click Through Details Tab**. This allows you to look at which opportunity a user sought more information about by utilizing linked features within SMARTS Email Notifications.

Step 1 Click on ► next to a user’s name. The arrow will change to ▲ and details will appear, as shown below.

Group by: drag and drop a column header to this section			
Full name	Number of SMARTS click-throughs	Date of last click-through	
William DeCocco	2	22-Apr-2013	
SPIN ID	Opportunity Title	Sponsor Name	Click Through Date
32458	Heart Failure Fellowship	University of Iowa	02-Apr-2013
43327	Visual Arts - Endowments and Prizes--York Wilson Endowment Award	Canada Council	22-Apr-2013

As shown above, the Details View Feature shows:

- The SPIN ID number;
- A linked opportunity title;
- The Sponsor’s name; and,
- The date the user clicked on links in the SMARTS Email Notification.



Please Note

Within the Details View Feature, the Click Through Date Column shows the actual click through dates for each particular opportunity. This tells administrators exactly when users accessed information about that opportunity. The non-detailed Date of Last Click Through Column provides general insight into whether or not a user has recently accessed any links provided by SMARTS.

Step 2 Click on ▲ again to hide the details.

14.4.6.2 Drag and Drop Group By Queries

Administrators can group their query results by user name.

- ❖ See the section of the same name within Section 14.4.2—Individual Reporting
- ❖ See also Section 9.5.10—Filtering Results

14.4.6.3 Evaluating Group By Queries

Administrators can assess information from grouped queries in a way that is most relevant to their concerns.

- ✓ See the section of the same name within Section 14.4.2—Individual Reporting

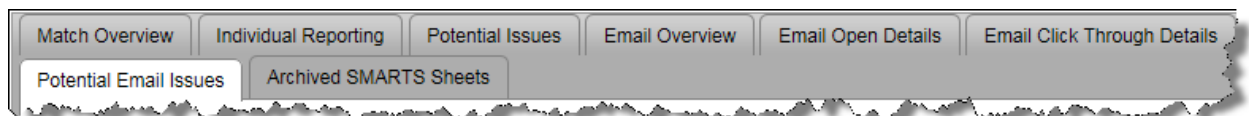
14.4.6.4 Using Filters to Customize Queries

Administrators can filter information in the Full Name Column, in a way that is most relevant to their concerns.

- ❖ See the section of the same name within Section 14.4.2—Individual Reporting
- ❖ See also Section 9.5.10—Filtering Results

14.4.7 Potential Email Errors

This is the seventh tab under **Administration > SMARTS Administration**.



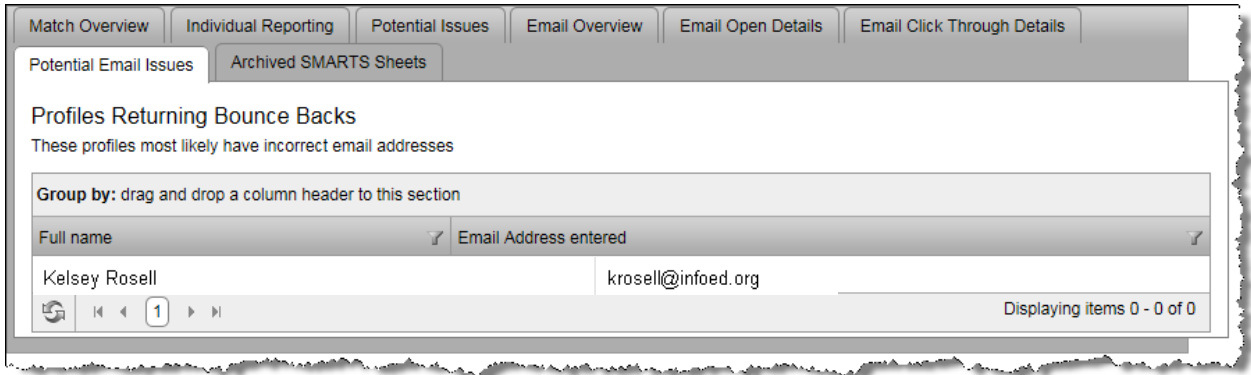
Using this feature, administrators can:

- Find out if users' SMARTS Email Notifications are being bounced-back to SPIN; and,
- Group and filter the information by name and email address.

Step 1 Click on **Email Errors** to begin.

The resulting screen is depicted in Figure 84 below.

Figure 84 SMARTS Administration—Potential Email Errors Window



As shown in Figure 84, administrators can see the names of all the users at their institution whose SMARTS Email Notifications have been bounced-back to the system.

Typically:

- The user made an error when initially entering their email address into SPIN; or
- Or an institution user is no longer employed there; or
- The user has moved to another department.

14.4.7.1 Drag and Drop Group By Queries

Administrators can group their query results by user name or email address.

- ❖ See the section of the same name within Section 14.4.2—Individual Reporting
- ❖ See also Section 9.5.10—Filtering Results

14.4.7.2 Evaluating Group By Queries

Administrators can assess information from grouped queries in a way that is most relevant to their concerns.

- ✓ See the section of the same name within Section 14.4.2—Individual Reporting

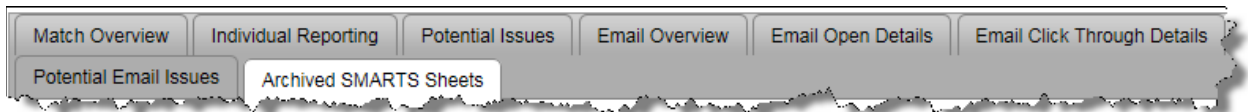
14.4.7.3 Using Filters to Customize Queries

Administrators can filter information in the Full Name or Email Address Entered Columns, in a way that is most relevant to their concerns.

- ❖ See the section of the same name within Section 14.4.2—Individual Reporting
- ❖ See also Section 9.5.10—Filtering Results

14.4.8 Archived SMARTS Sheets

This is the eighth and last tab under **Administration > SMARTS Administration**.



Using this feature, administrators can:

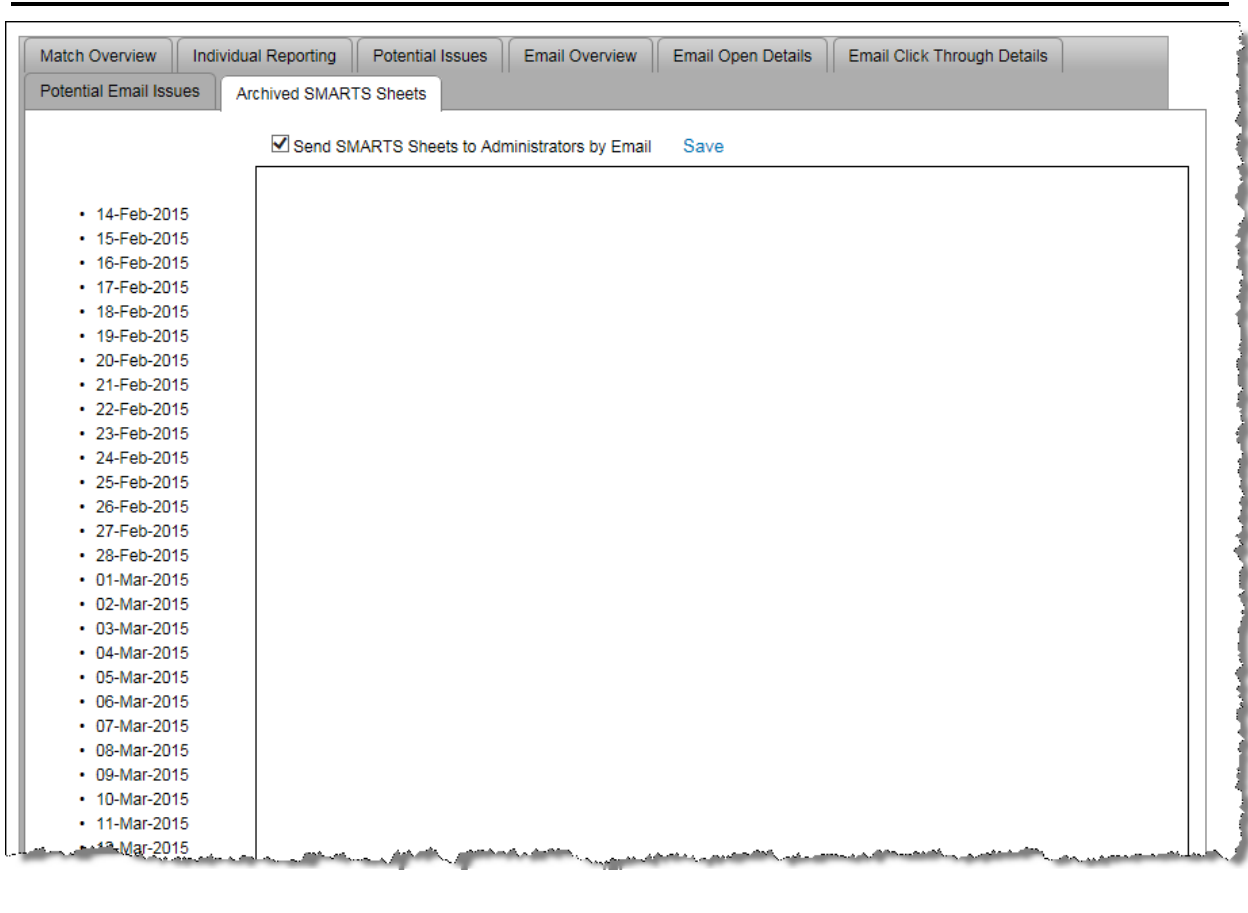
- Review compilations of all opportunities that were sent to their institution's users on a particular day; and,
- Opt-in or decline to have daily compilations sent directly to their email inboxes.

Step 1 Click on [Archived SMARTS Sheets](#) to begin.

The resulting screen is partially depicted in Figure 85 below.

Figure 85

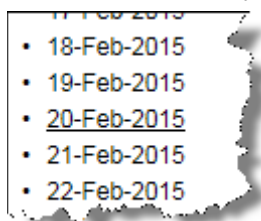
SMARTS Administration—Archived SMARTS Sheets Window



As shown in Figure 85, upon first accessing this feature, administrators will see a blank area, with dates listed on the left side. The dates are live links that provide text copies of all grant opportunities sent to every institution user who has SMARTS Email Notifications activated.

Step 2 Hover over your desired date within the left-hand column of the screen.

Step 3 When the date you want appears with an underline, click.



✓ In this example, we are going to access returns for February 20th, 2015.

The following screen results:

The screenshot shows a web application interface with two tabs: 'Potential Email Issues' and 'Archived SMARTS Sheets'. The 'Archived SMARTS Sheets' tab is active. At the top of the main content area, there is a checkbox labeled 'Send SMARTS Sheets to Administrators by Email' which is checked, and a 'Save' button. Below this, there is a list of dates on the left side, ranging from 14-Feb-2015 to 13-Mar-2015. The date 20-Feb-2015 is highlighted. To the right of the list, a preview of a SMARTS Sheet is shown, enclosed in a box with a scroll bar. The preview text is as follows:

```
=====
SMARTS Sheets: A summary of your institution's automated SMARTS results for 17-Mar-2015
=====
Polytechnique Montreal
-----
-- Ghyslain Boisvert
-- ghyslain.boisvert@polymtl.ca
-----
-- eng keyword
-- SPIN ID:           03154
-- Opportunity Title: WatSave Technology Award
-- Sponsor:           International Commission on Irrigation and Drainage
-- SPIN URL:          https://spin.infoedglobal.com/Program/Opportunity/03154
-----
-- SPIN ID:           03233
-- Opportunity Title: WatSave Innovative Water Management Award
-- Sponsor:           International Commission on Irrigation and Drainage
-- SPIN URL:          https://spin.infoedglobal.com/Program/Opportunity/03233
-----
-- SPIN ID:           03268
-- Opportunity Title: WatSave Young Professional Award
-- Sponsor:           International Commission on Irrigation and Drainage
-- SPIN URL:          https://spin.infoedglobal.com/Program/Opportunity/03268
-----
-- SPIN ID:           04400
-- Opportunity Title: International Helmut Claas-Scholarship
-- Sponsor:           CLAAS Foundation
-----
```

The opportunities that users received are shown directly beneath their names. Beneath the date that the results were sent, the screen shows the names of users.

As shown above, the **SMARTS Sheet** shows:

- The SPIN ID number;
- The Opportunity Title;
- The Sponsor's name; and,
- The SPIN URL address of the opportunity.

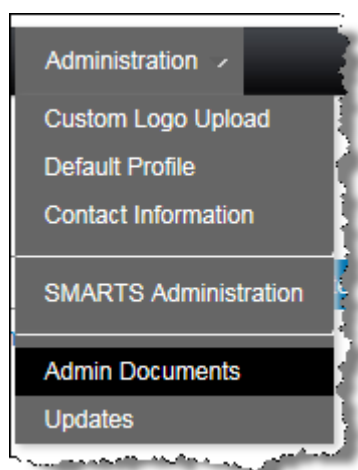
If there were no SMARTS Email Notifications sent to any of your institution's users on that particular day, the following screen would result:

```
=====
SMARTS Sheets: A summary of your institution's automated SMARTS results for 01-Jul-2013
=====
InfoEd Global
-----
No relevant opportunities have been matched to your institution's SMARTS searches.

Please do not reply to this email; this is sent from an unmonitored mailbox.
-----
```

14.5 Admin Documents

The Admin Documents menu link is the fifth link on the Administration Menu in the SPIN Toolbar.



When clicked, an Administrative Documents- Legal Disclaimer popup (Figure 86) appears informing the user of the proprietary nature of all documents contained/derived from the InfoEd systems and asks for an agreement/certification of the acknowledgement of InfoEd's rights and requests in regards to said documentation.

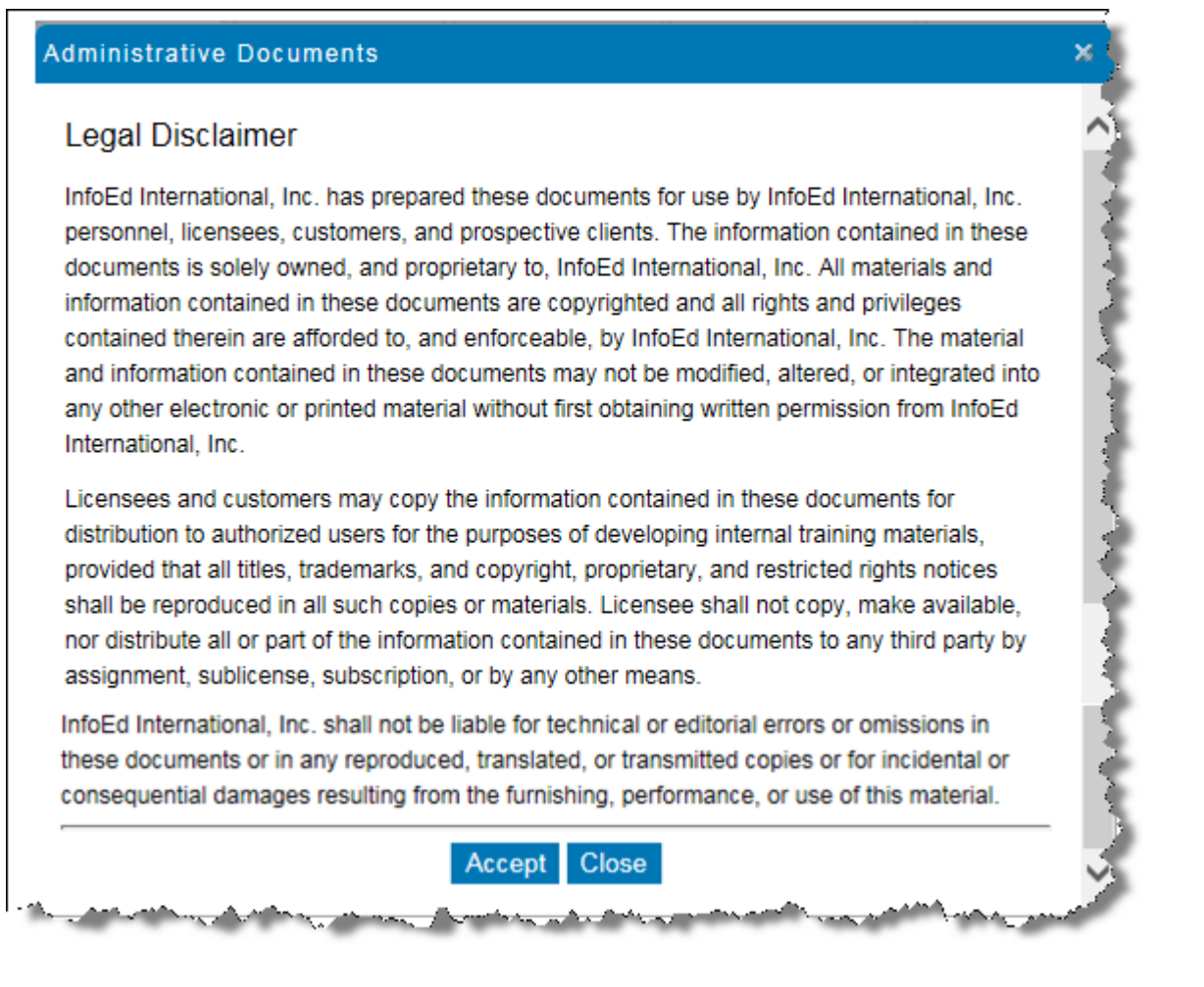
The complete language for agreement is:

InfoEd International, Inc. has prepared these documents for use by InfoEd International, Inc. personnel, licensees, customers, and prospective clients. The information contained in these documents is solely owned, and proprietary to, InfoEd International, Inc. All materials and information contained in these documents are copyrighted and all rights and privileges contained therein are afforded to, and enforceable, by InfoEd International, Inc. The material and information contained in these documents may not be modified, altered, or integrated into any other electronic or printed material without first obtaining written permission from InfoEd International, Inc.

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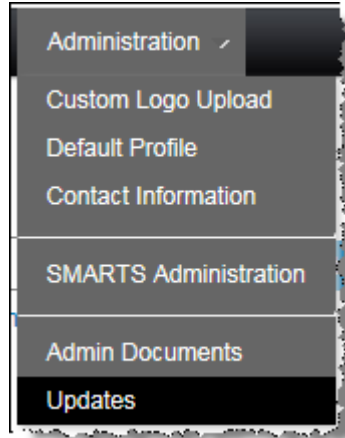
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Figure 86 Administrative Documents—Legal Disclaimer



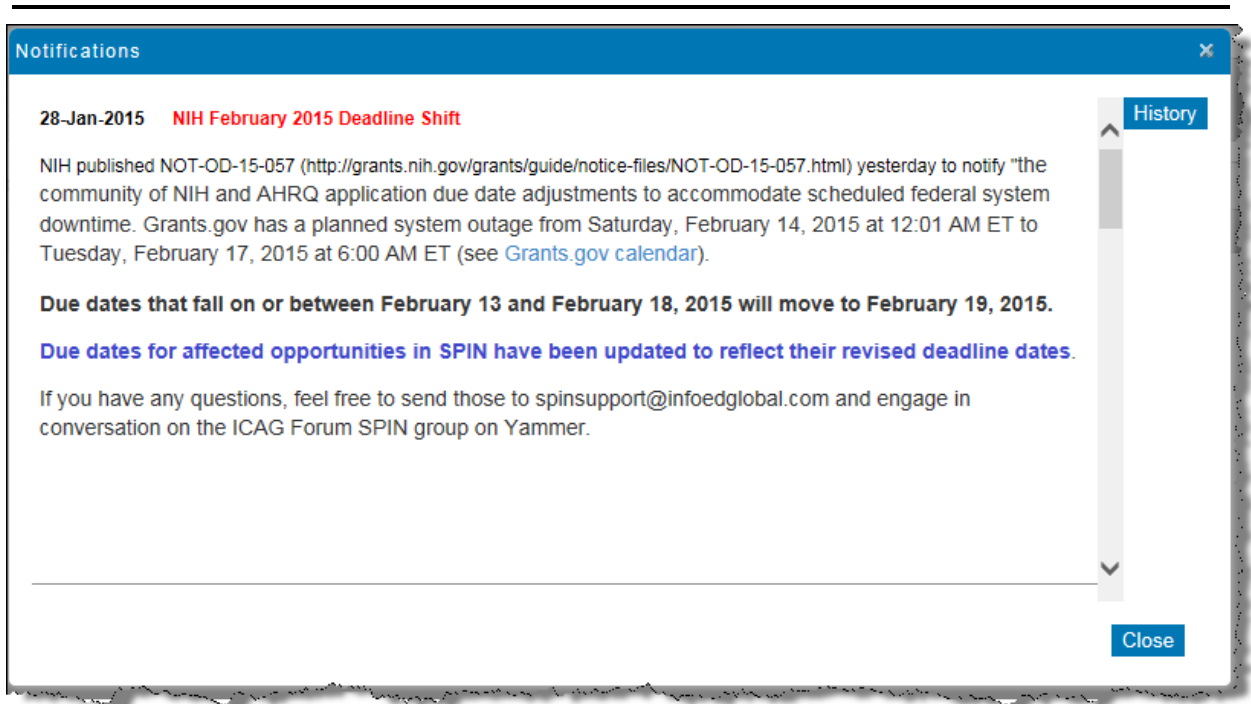
14.6 Updates

The Updates menu link is the sixth and last link on the Administration Menu in the SPIN Toolbar.



When clicked, a Notifications popup (Figure 87) appears informing the user of any InfoEd Specific and/or industry-related notifications to consider in your business/system processes.

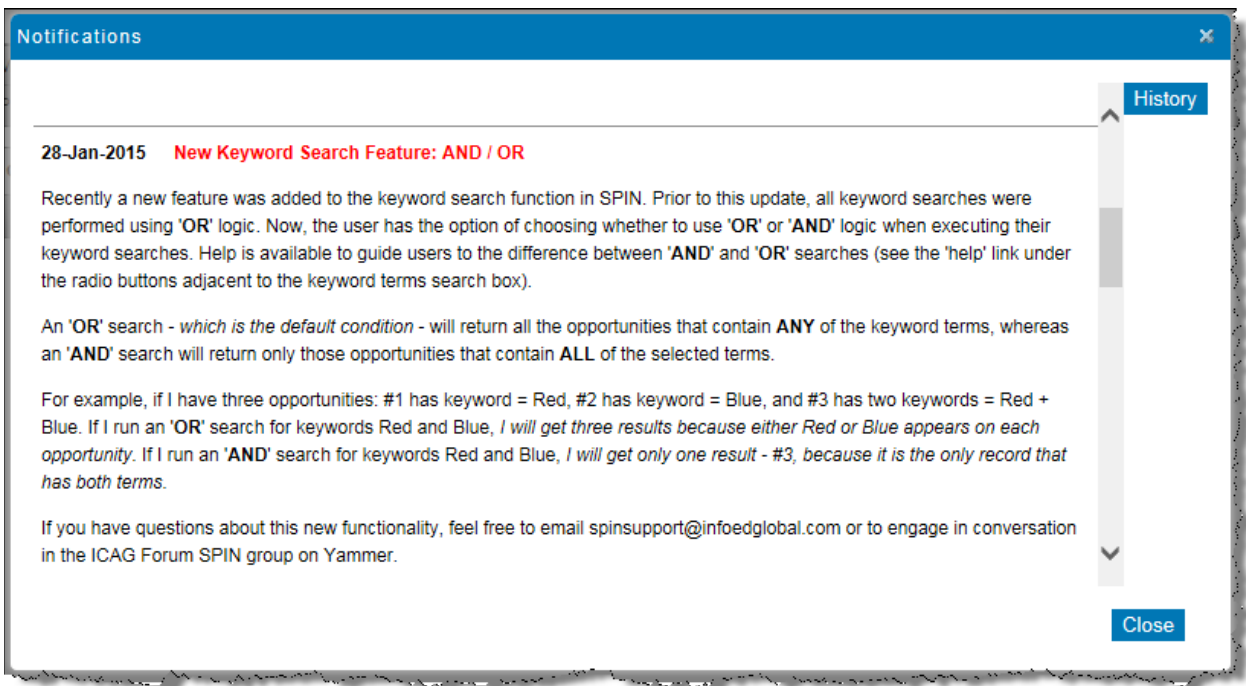
Figure 87 **Updates - Notifications**



Step 1 If the user clicks the **History** button, the notification list will be updated to contain additional, less recent notifications.

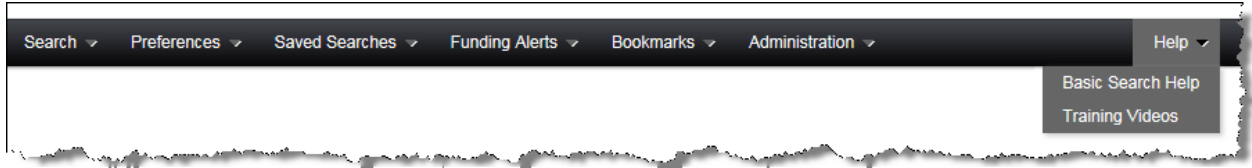
Step 2 To close this Notifications popup, the user will click the **Close** button.

Figure 88 Updates – Notifications History



15 Help Menu

The Help Menu is the seventh and last menu item on SPIN's main toolbar.



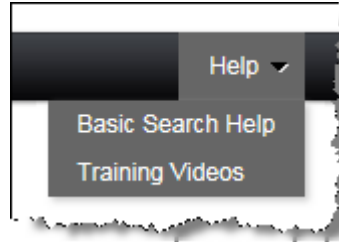
This menu contains three links which direct the user to some basic search help, Funding Alerts Help as well as to Training Videos for SPIN.

- [Basic Search Help](#)
- [Funding Alerts Help](#)
- [Training Videos](#)

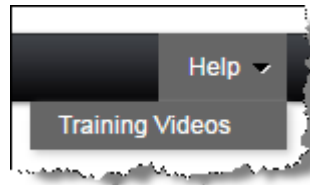


**Please
Note**

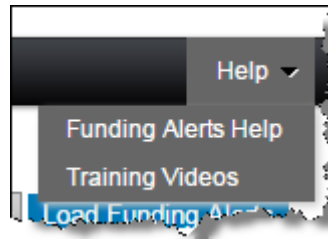
The content under the help menu varies a bit from screen to screen. The Basic Search Help option only appears when the user is utilizing any of the three search screens - Basic Search, InfoEd Keyword Search and Advanced Search modes.



When the user is accessing Preferences or Saved Searches, for example, all you may see is 'Training Videos'.

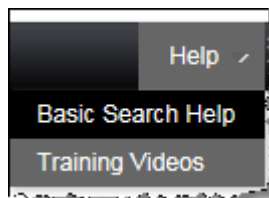


When the user is on Manage Funding Alerts, the user will see 'Funding Alerts Help' along with 'Training Videos'.



15.1.1 Basic Search Help

Basic Search Help is one link on the SPIN Toolbar Help Menu when the user is accessing one of the Search modes – Basic, InfoEd Keyword or Advanced Search.



This version of SPIN Search integrates with a modern full-text search engine. It is designed to allow you to perform as simple or as complex of a search as you would like to. Searches are carried out against the entire text of the SPIN programs; this includes opportunity titles, sponsor names, synopses, objectives, as well as funding opportunity numbers, email addresses, keywords, and several other fields.

The search automatically invokes inflectional forms of the entered words. For example, a search for test will scan all SPIN programs for: test, tests, tested, and testing.

This can be disabled by inserting a plus sign (+) before the search term, as detailed in the Basic Search Help popup that opens when the user clicks on the Help Menu, Basic Search Help link (Figure 89).

Figure 89 Basic Search Help Popup Search Term Input Styles

This version of SPIN Search integrates with a modern full-text search engine. It is designed to allow you to perform as simple or as complex of a search as you would like to. Searches are carried out against the entire text of the SPIN programs; this includes opportunity titles, sponsor names, synopses, objectives, as well as funding opportunity numbers, email addresses, keywords, and several other fields.

The search automatically invokes inflectional forms of the entered words. For example, a search for test will scan all SPIN programs for: test, tests, tested, and testing. This can be disabled by inserting a plus sign (+) before the search term, as shown below.

The search also has the ability pass the entered terms through an integrated thesaurus, potentially expanding the terms being searched for. For example, a search for cancer will scan all SPIN programs for: cancer, carcinogens, chemotherapy, tumors, oncology, and other terms. This can be invoked for all terms entered by simply enabling the Find Similar Terms checkbox, or by inserting a ~ before each individual term you want passed through the thesaurus. Note that enabling the Find Similar Terms checkbox will not expand quoted strings (e.g. "search term") via the thesaurus by default. You must insert a ~ before the quoted string, as shown below.

The search also contains a number of capabilities to build complex searches with various logic and grammar parsing. The commands can be combined together, along with parenthetical logic to dictate the order of operations, for building complex queries defining exactly what you are looking for.

Example Input	Description
Scientific research	Searches for records containing 'scientific' and 'research' or their inflectional forms
Scientific OR research	Searches for records containing 'scientific' or 'research' or their inflectional forms
"Scientific research"	Wrapping terms in double quotes searches for records containing the phrase 'scientific research'
Scientific -research	Inserting a minus symbol before a term searches for records containing 'scientific' and not 'research'
+scientific	Inserting a plus symbol before a term performs search after disabling expansion for inflectional forms
Scientif*	Appending an asterisk to a term invokes a wildcard search: searches for records containing 'scient' and any suffix
<scientific research>	Wrapping terms in angled brackets searches for records containing 'scientific' and 'research' and ranks results by the proximity of the two.
~Scientific research	Inserting a tilde searches for records containing 'scientific' or its related terms in the thesaurus, and 'research'
~"Scientific research"	Inserting a tilde before a quoted phrase searches for records containing the phrase 'scientific research' or its related terms in the thesaurus

The search also has the ability pass the entered terms through an integrated thesaurus, potentially expanding the terms being searched for. For example, a search for cancer will scan all SPIN programs for: cancer, carcinogens, chemotherapy, tumors, oncology, and other terms.

This can be invoked for all terms entered by simply enabling the Find Similar Terms checkbox, or by inserting a '~' before each individual term you want passed through the thesaurus. Note that enabling the Find Similar Terms checkbox will not expand quoted strings (e.g. "search term") via the thesaurus by default. You must insert a ~ before the quoted string, as shown below.

The search also contains a number of capabilities to build complex searches with various logic and grammar parsing. The commands can be combined together, along with parenthetical logic to dictate the order of operations, for building complex queries defining exactly what you are looking for.

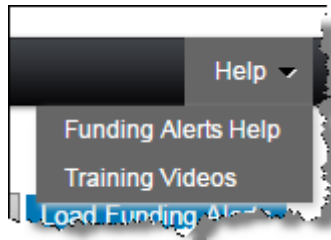
Figure 90, Search Term Input Styles describes what each word or symbol directs the SPIN search engine to do.

Figure 90 Basic Search Help - Search Term Input Styles

Example Input	Description
Scientific research	Searches for records containing 'scientific' and 'research' or their inflectional forms
Scientific OR research	Searches for records containing 'scientific' or 'research' or their inflectional forms
"Scientific research"	Wrapping terms in double quotes searches for records containing the phrase 'scientific research'
Scientific -research	Inserting a minus symbol before a term searches for records containing 'scientific' and not 'research'
+scientific	Inserting a plus symbol before a term performs search after disabling expansion for inflectional forms
Scient*	Appending an asterisk to a term invokes a wildcard search: searches for records containing 'scient' and any suffix
<scientific research>	Wrapping terms in angled brackets searches for records containing 'scientific' and 'research' and ranks results by the proximity of the two.
~Scientific research	Inserting a tilde searches for records containing 'scientific' or its related terms in the thesaurus, and 'research'
~"Scientific research"	Inserting a tilde before a quoted phrase searches for records containing the phrase 'scientific research' or its related terms in the thesaurus

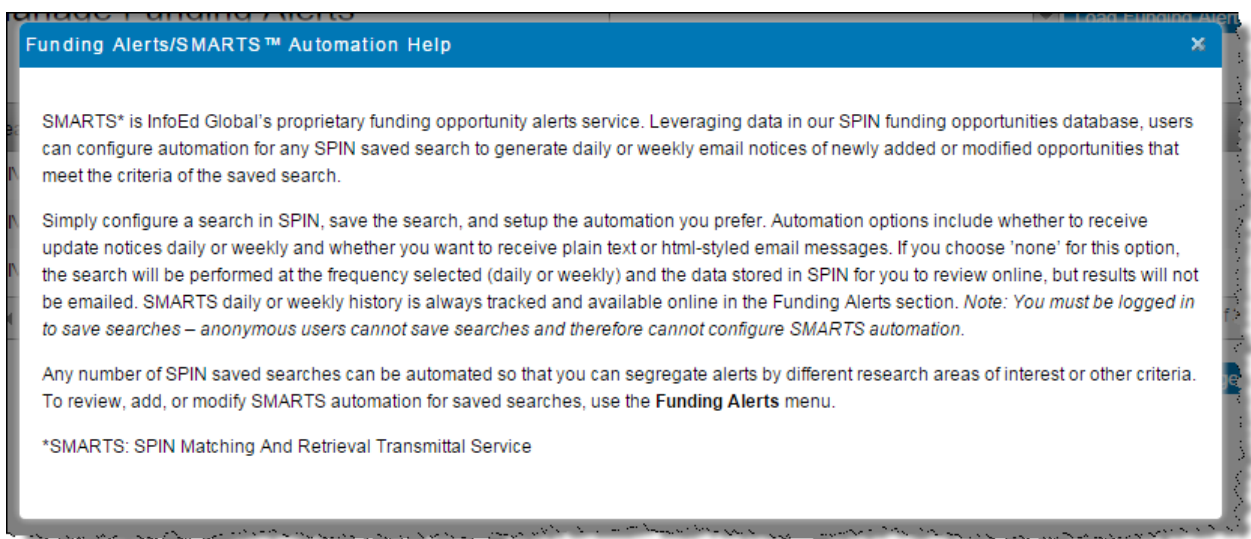
15.1.2 Funding Alerts Help

Funding Alerts Help is a second link on the SPIN Toolbar Help Menu which appears when the user is accessing Manage Funding Alerts accessed via the Manage Funding option on the Funding Alerts Menu.



When clicked this menu item opens the Funding Alerts/SMARTS Automation Help Screen (Figure 91).

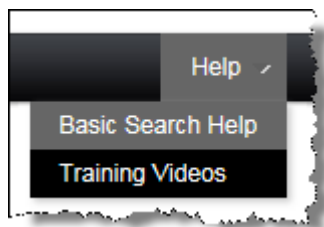
Figure 91 Funding Alerts/Smarts Automation Help Screen



This page contains some basic information about SMARTS, InfoEd's funding opportunity alerts service along with general instruction on its use and setup.

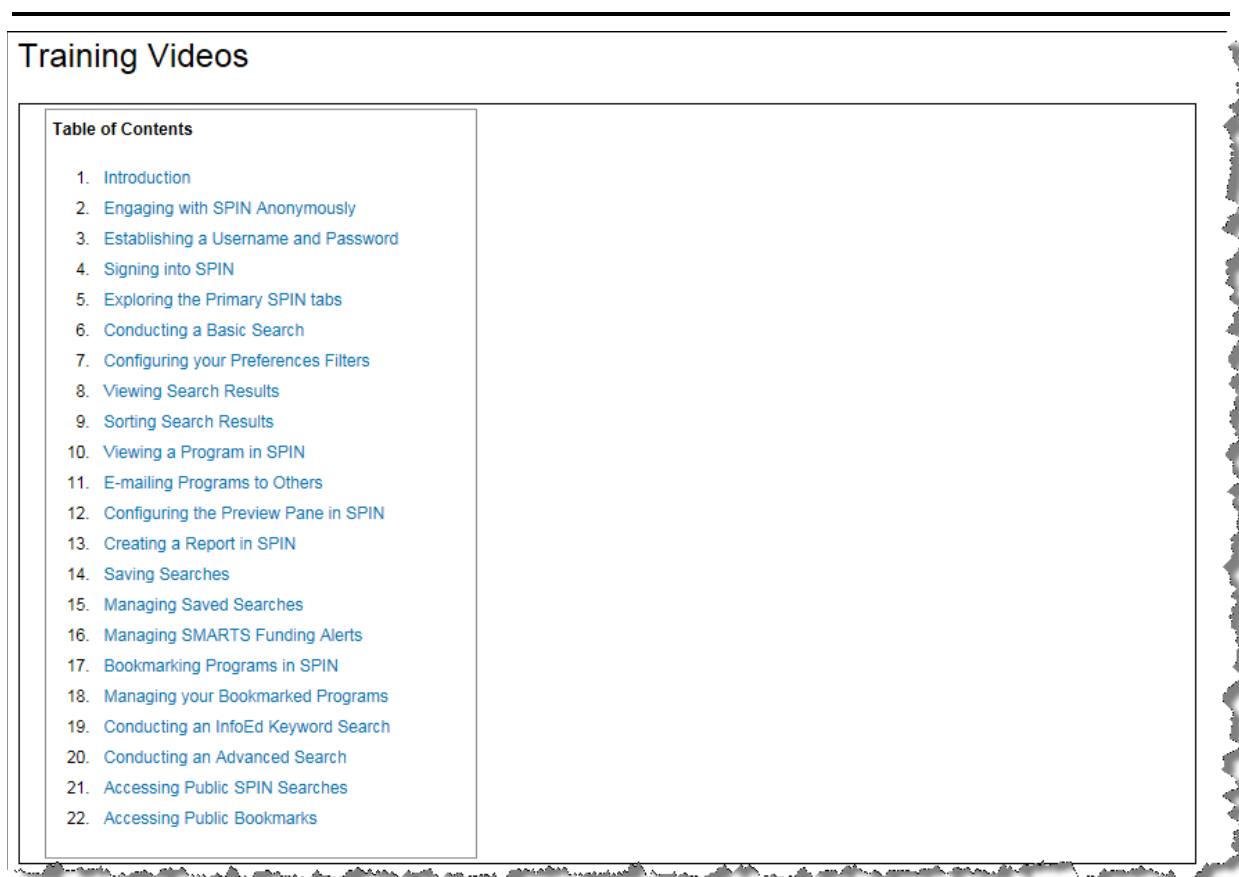
15.1.3 Training Videos

Training Videos is a third link on the SPIN Toolbar Help Menu.



When clicked this menu item opens the Training Videos Screen (illustration below).

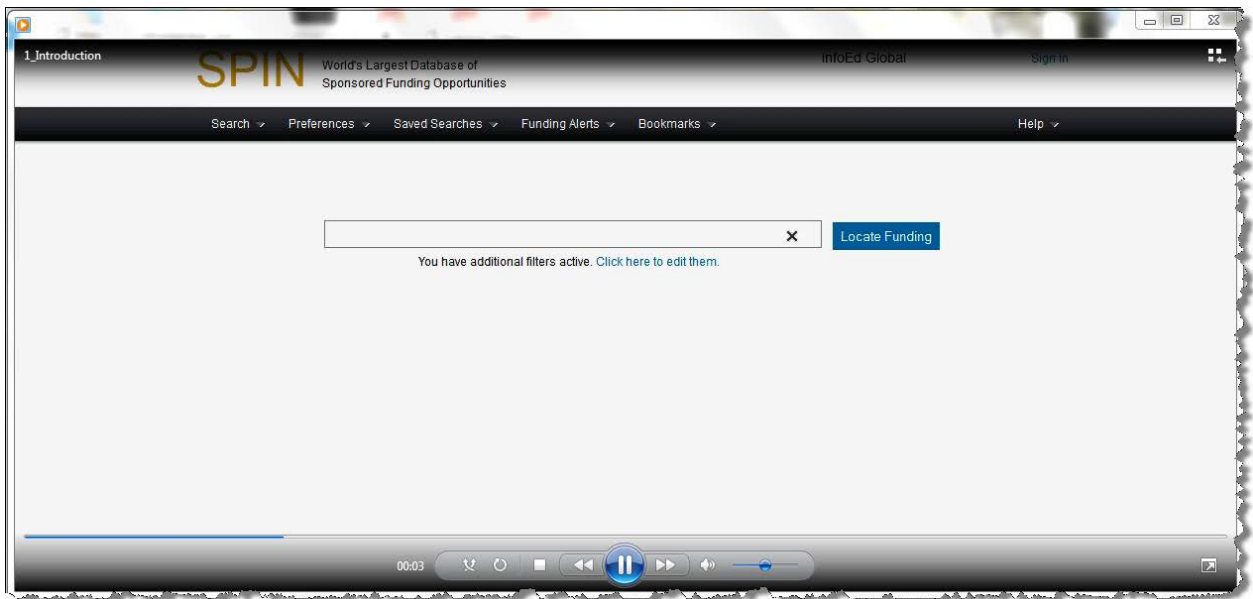
Figure 92 **Training Videos Screen**



This page contains a list of available SPIN training videos for the user to view to gain further insight into the SPIN system.

Step 1 Click on any of the blue links to launch a media player containing the selected video (see illustration below).

Figure 93 *Training Videos - Link Launches Video*



There are currently over twenty SPIN training videos available for viewing via this Training Video link.