InfoED SPIN - User Guide

InfoED SPIN User Guide

Overview

SPIN is a 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.

With the addition of SMARTS, users can enhance the power of SPIN, by establishing custom notification systems to stay on top of current and upcoming opportunities.

This guide is intended to show the user how to access SPINS, look up funding opportunities and establish SMARTS notifications.

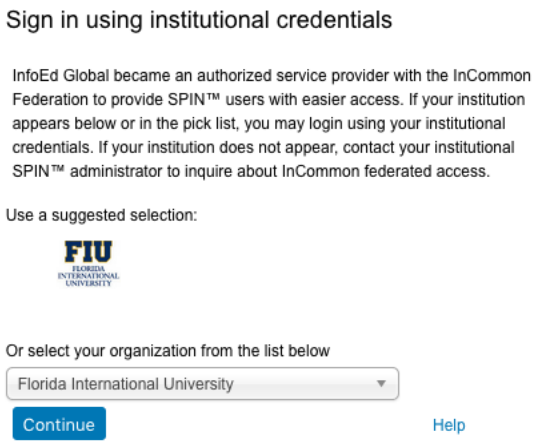
Contents

Accessing SPIN

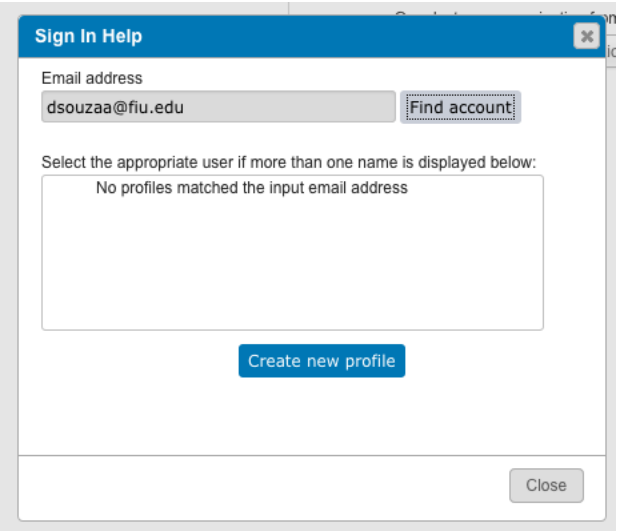
SPIN is accessed by logging in to the application with a username and password. Authenticated users will have the ability to save settings, preferences, and search data.

To access SPIN, the user will utilize the following steps:

1. Navigate to https://sping.infoedglobal.com/
2. Click on '**Sign In**', which is located on the upper, right-hand corner of the screen
3. Select '**Florida International University**' from the drop-down menu under the heading '**Sign in using institutional credentials**' and click continue.
4. You should then be taken to the FIU login page.
5. Enter your FIU *Username* and *Password*



If you have a legacy SPIN account, you will be prompted to select the legacy profile and link it to your FIU account upon your first login. Otherwise, you can select the option to create a new profile.



The SPIN Home Screen

The SPIN Home Screen is the starting point for searching for opportunities, customizing queries, and filtering results to meet your needs.

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
- SPIN Home Screen Footer
- SPIN Toolbar

SPIN Home Screen Header

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

Feature	Comment
SPIN Insignia	Clicking on the SPIN insignia on the top portion of the header refreshes the SPIN Home Screen.
User Name	The user's name will be shown in the right top portion of the SPIN Home Screen Header.
Sign Out Link	To sign out of SPIN, click on this link. A message will appear, confirming the user's request to sign out.

SPIN Home Screen Footer

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

Feature	Comment
Research Administration Digest	Link to the Research Administration Digest site, where users can access podcasts, articles, and special presentations about Research Administration.

SPIN Toolbar

Figure 3: The SPIN Toolbar

The SPIN Toolbar contains the following items:

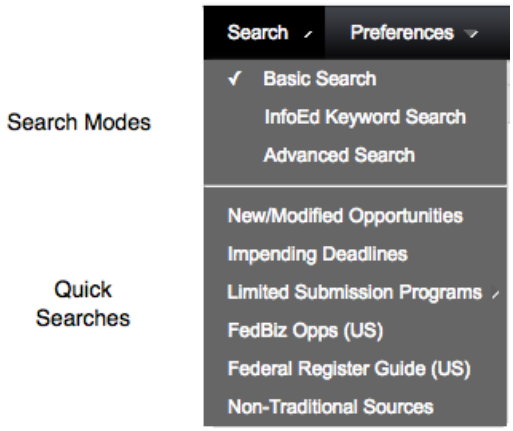
- Search Menu
- Preferences Menu
- Saved Searches Menu
- Funding Alerts Menu
- Bookmarks Menu
- Help

Search

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

1. Search Modes
2. Quick Searches

Figure 4: Search Menu Items



SPIN Search Modes

Feature	Action	Comment
Basic Search	Enter search term(s) For Example: If a 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.	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.
InfoEd Keyword Search	Click on 'Select Keywords' to add keywords to your search. Click Save once desired keyword(s) have been chosen. AND/OR radial button: • AND (more exclusive) • OR (more inclusive)	The 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. When InfoEd Keyword search mode is selected, the standard search textbox appears along with a Select Keywords link and an AND/OR selector.
Advanced Search	Build your search using expressions, groups and filters	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.

SPIN Quick Searches

Feature	Action	Comment
New/Modified Opportunities	Features on this screen 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.	The New/Modified Opportunities Quick Search presents opportunities that have been entered/modified within the past seven (7) days.
Impending Deadlines	Features on this screen 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.	The Impending Deadlines Quick Search presents opportunities with deadlines within the next 8 weeks or with open deadlines.

Limited Submissions	Select either: • All Limited Submissions • Limited Submissions per Configuration	Features on this screen 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.
FedBiz Opps (US)	Features on this screen 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.	The Browse FedBizOpps Quick Searches Option 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.
Federal Register Guide (US)		The US Federal Register Guide Quick Search Option provides users with access to pared-down grants. The information is published by the National Archives and Records Administration.
Non-Traditional Sources		This menu link provides a listing of non-traditional research funding sources including 'crowdfunding' opportunities.

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.

<u>To access the Advance Search page, the user will utilize the following steps:</u>

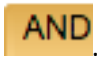
1. Click on the Advanced Search menu item in the Search Menu.
2. The main screen will be repopulated with the two primary components of the Advanced Search function which are the Advanced Search Tool and the Locate Funding button.

Figure 5: Advanced Search Tool

Component	Comments
AND/OR Function	Allows the user to designate an AND or OR modality for the selected expression.
Add Expression Function	Allows the user to add a new search expression.
Add Group Function	Allows the user to add a new expression group.
Remove Item Function	Allows the user to remove a search item.

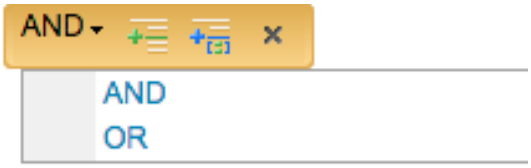
AND/OR Function

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. The system is set up to default to 'AND.'

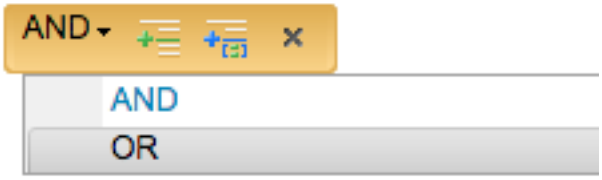
1. Hover your cursor next to 

. A black, downward-facing arrow will appear: 

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



3. Mouse over to the option you would like to select.



4. Click the highlighted item.

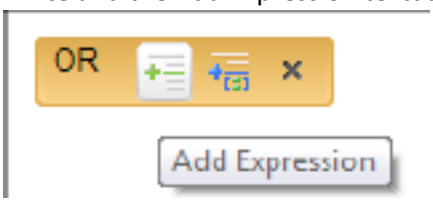
ADD EXPRESSION FUNCTION

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

This function has the following components:

- A pull-down menu of opportunity criteria
- A pull-down menu with a contains vs. does not contain option
- A blank search field for entering term
- A remove item function

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.



2. Click on the Add Expression Function. A first-level criteria and search term bar will appear.

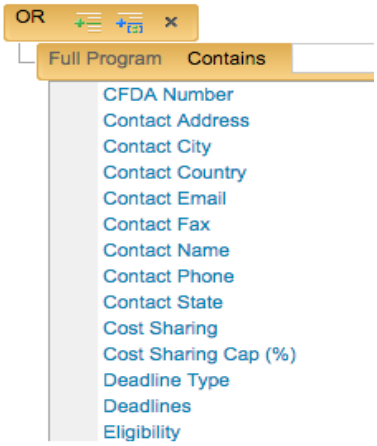
Users can click on the Add Expression Function as many times as necessary, depending on the goal of their advanced search.

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

3. Hover your cursor to the right of 

. A black, downward-facting arrow appears: 

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

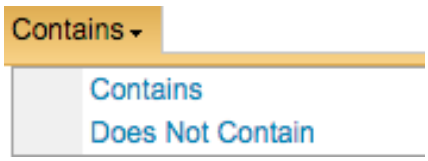


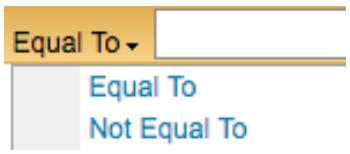
If a user does not use the pull-down menu, the default will be 'Full Program' which search the entire content of the opportunity.

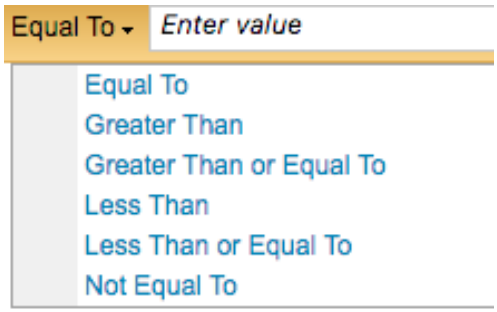
Appendix A lists those criteria which are more complex and/or have additional associated functions.

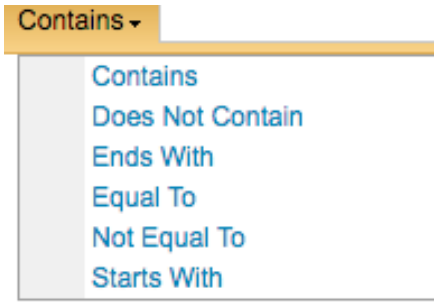
4. Use the scroll-bar on the right-side of the list to locate the criteria you want, then hover your cursor over it, until it becomes highlighted in gray.
5. Click on your selection.
6. Depending on which of the 36 criteria you choose, the area to the right of criteria will remain as 'Contains', or change to 'Equal To'.
7. 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 additional choices allow you to further clarify your search limitations. *These vary among the 36 criteria*.









8. Select your search limitation
9. If there is a drop-down menu available choose your criteria. If there is not a drop-down menu, type your selection into the empty field.

   11 of the 36 available criteria fields have Progressive Text Feature attached to them. This will allow you to start typing your selection and as you begin typing, SPIN will recognize your value.

   The 11 fields with Progressive Text Feature are: Contact Country; Contact Name; Cost Sharing; Deadline Type; Indirect Cost; Limited Submission; Open Application Period; Sponsor Mechanism; Sponsor; Sponsor Type; and, Target.

10. Click the Locate Funding button

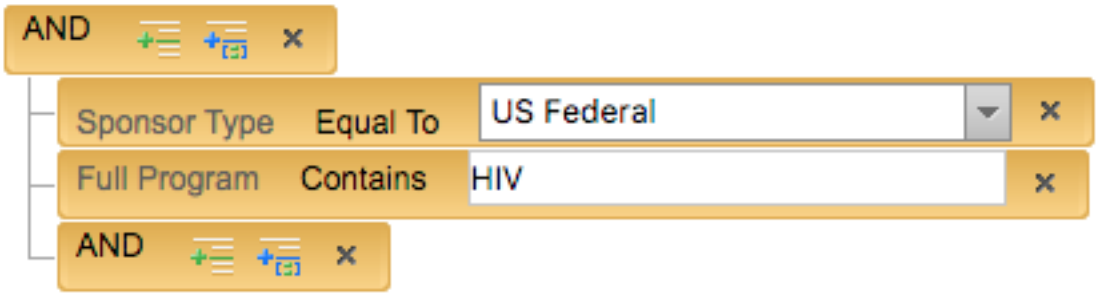
ADD GROUP FUNCTION

The Add Group Function allows SPIN users to add additional search terms. In other words, users are adding new groups of criteria when they use this feature.

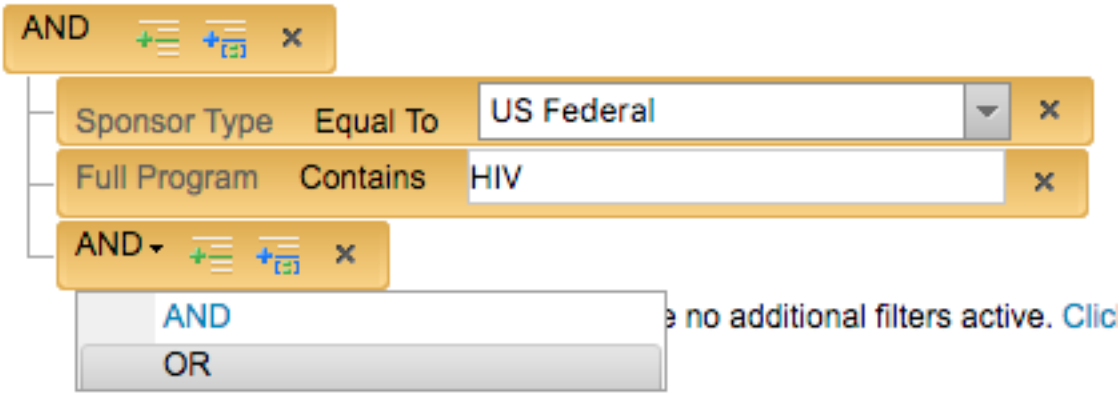
Example:

You want a US Federal Sponsor Type. You also want a search geared towards HIV, however you want to expand your search to closely-related opportunities, without changing it drastically. You can do so by using changing AND/OR Functions *between search terms* by using the Add Group Function.

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

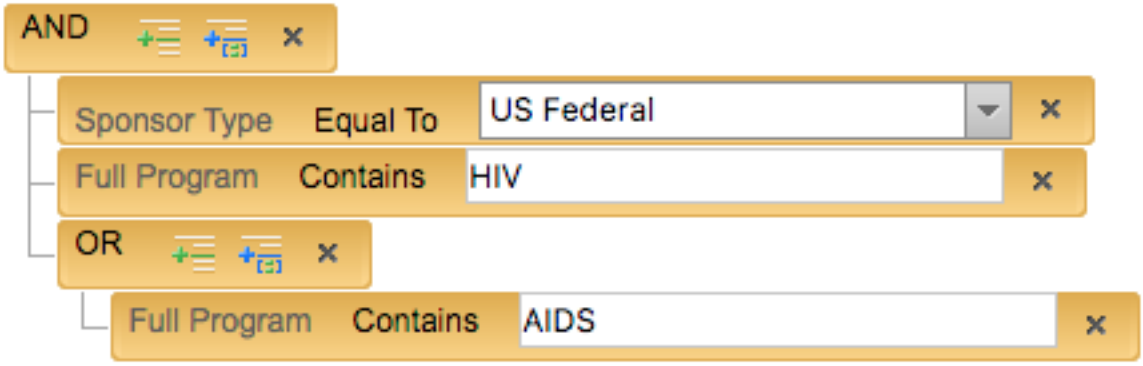


2. Hover your cursor next to  . A black, downward-facing arrow will appear: 
3. Click on the arrow and a drop-down list will appear giving the user an opportunity to select either 'AND' or 'OR'.
4. Mouse over to the option you would like to select.



5. Click on your selection. A second tier of the Advanced Search Tool is now set.

6. Click  to add an expression.
7. Enter criteria:



8. Click the 

Button

REMOVE ITEM FUNCTION

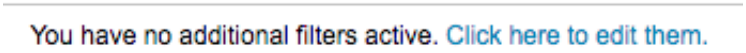
At any point in the Advanced Search Mode, users can remove expressions one by one, or remove entire groups of expressions by using the Remove Item Function  .

Setting Filters

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

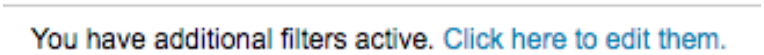
If a user has not edited any of the Category Filters, Search Options, or Export Data Options, then this SPIN Filter link will appear as '**You have no additional filters active'** with the blue link for **Click here to edit them**.

Figure 6: No Filters



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

Figure 7: Active Filters

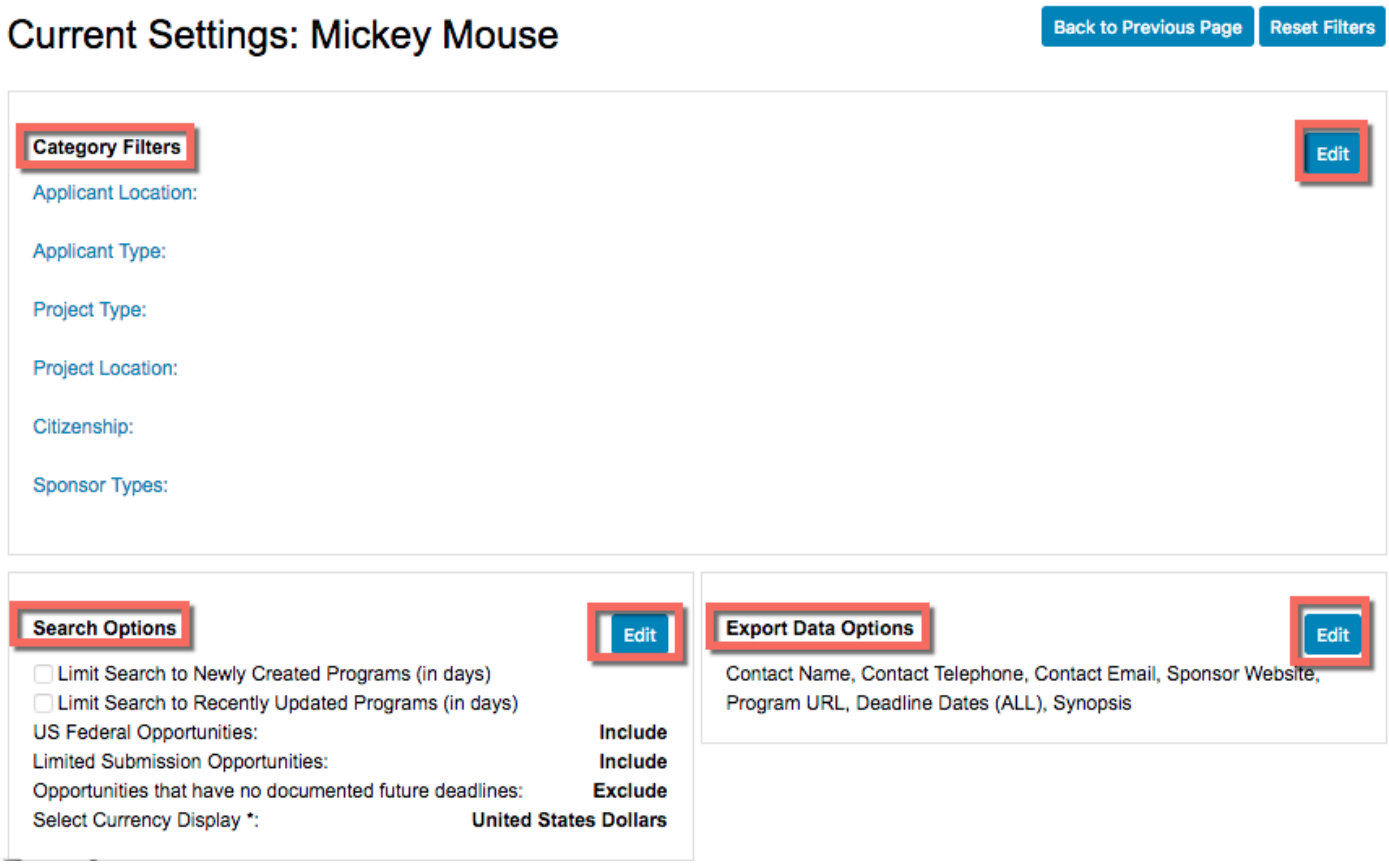


In either instance, when the user clicks the blue link, the Current Settings Page will open.

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

If a user clicks the *blue Edit button* for any of these filter options, the respective page will open.

Figure 8: Current Settings



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.

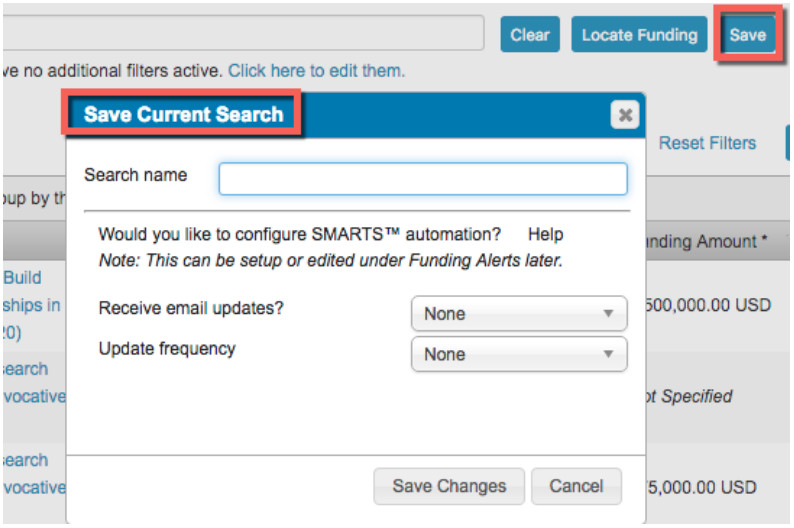
To save your search parameters from either Basic, InfoEd Keyword or Advanced Search Mode:

1. Click the Save button. A popup window entitled 'Save Current Search' will appear (see figure 9).

Field	Action	Comment
Name	Enter a name for your search	
Receive email updates?	None/HTML/Plain Text	To receive SMART emails for your search choose if you would prefer to receive emails in HTML or Plain Text format. If you do not wish to receive emails for this search, select None.
Update Frequency	None/Daily/Weekly	The frequency in which emails will be delivered

2. Click 'Save Changes'

Figure 9: Save Current Search



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.

The key fields on the returned results screen are:

Field	Comment
SPIN ID	An automatically generated SPIN ID number associated with the opportunity.
Opportunity Title	The name the Sponsor gives 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

Exploring & Organizing Results

SPIN's Returned Results contains basic features to help users navigate through their opportunities:

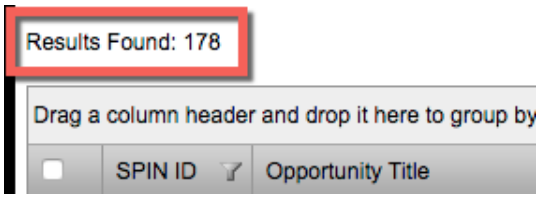
- The Opportunity Count;
- The Display Counter;
- The Page Counter & Navigation Bar; and,
- The View Details Arrows, Sorting Arrows & Checkbox.
- Export

After users have oriented themselves to the desired returned results, they can do the following:

- Open Opportunity Information Links
- Sort Results
- Filter Results

Opportunity Count

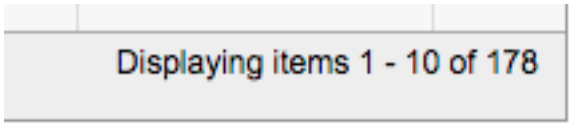
In the upper, left-hand corner of the **Returned Results Screen,** there is a display-only count of the number of opportunities returned as a result of the current search being run.



The Opportunity Count is SPIN-generated, and cannot be manipulated.

Display Counter

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

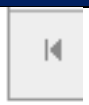
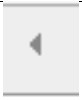
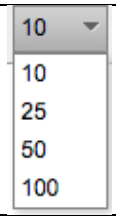


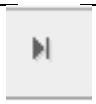
Page Counter & Navigation Bar

In the lower, left-hand corner of the **Returned Results Screen** 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.

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

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

Function	Comment
	Clicking this takes users back to the very first page of opportunities, at any time.
	Clicking this takes users to the previous numbered page, at any time.
	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. Clicking directly onto the ellipsis will display the next 10 page numbers. 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.
	This pull-down feature allows users to choose how many results per page will be displayed. The selected number directly affects how many total page numbers will be shown in the navigation bar.

	Clicking this takes users forward one page to the next numbered page.
	Clicking this button will take users to the very last page of opportunities

View Details Arrows

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

Clicking on the  will open details about each opportunity appearing on the screen.

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.

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.

Checkbox

Users have the option of 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

Using the Export Function

The Results Page 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.

1. Click on 

2. Two options will be available: 1) To MS Word and 2) To MS Excel
3. Click on your desired selection

***Depending on the browser, the user may get a window asking you to open or save the exported file. The user can open the file immediately, or save it to any location, and give it a name.

Modifying Column Presentation

Users can modify the order of column appearance by moving the columns' positions using a drag and drop feature.

1. Click into the Column Header Bar within the column you want to move.
2. Keep your finger depressed on the mouse button and begin to drag the column in the direction you want the column to be located.
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.

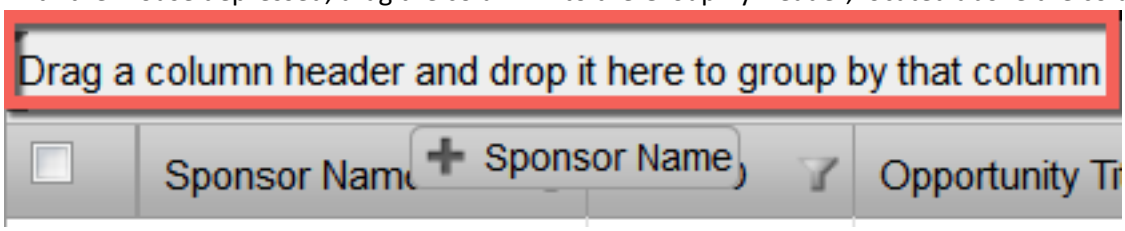
4. Continue dragging until the black triangles appear on the left side of the column that you want your moving column to precede.
5. Let go of the mouse button. The column order has been altered.

Group By Feature

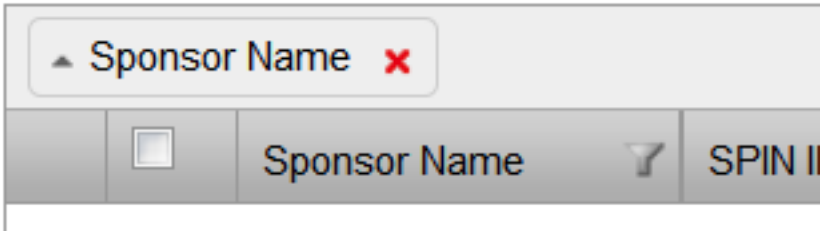
SPIN users can drag and drop columns within the Returned Results Screen into an empty header above the returned results. This is called the Group By Feature.

This feature differs from modifying the column presentation. 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.

1. Click the Column Header and Hold your mouse button down. The header color will change from grey to white.
2. With the mouse depressed, drag the column into the Group By Header, located above the column headers.



3. Let go of the mouse button, to drop the column in the **Group By Header.**



Users have access to the same returned results, but now they are organized by the column selted. If there are multiple opportunities offered by the same criteria, such as Sponsor, those would be grouped together.

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.

Filtering Results

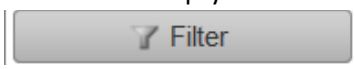
In addition to sort features, SPIN offers numerous options for filtering returned results. The filtering process involves sifting through a large number of returns to limit what the user will see.

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

Users may filter their returned results by:

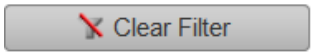
- Equal values;
- Values containing everything but a particular term or value;
- Values that start with a letter or number;
- Values that contains a particular term or value;
- Values that end with a name or number; and,
- Calendar values (Next Deadline Date Column only).

<u>To access the Filtering functionality, the user will utilize the following steps:</u>

1. From the Returned Results Screen, click within the Column you wish to filter by. A filtering menu will appear to the right of the column.
2. Select an option from the pull-down menu.
3. Place your cursor in the empty field below the pull-down menu and enter your criteria.
4. Click on the 

button.

<u>To return to your original search results:</u>

1. Click on the filter icon.
2. Click the 

button.

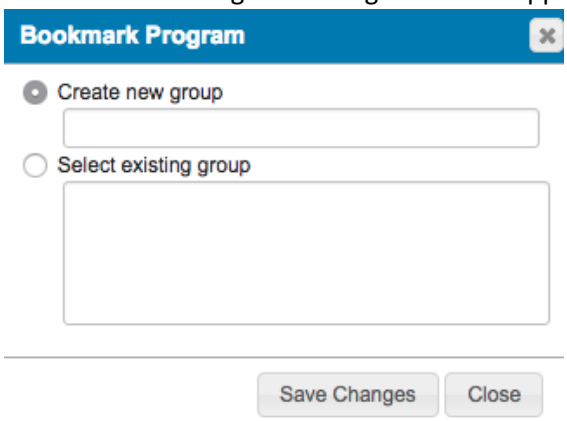
Bookmarking Opportunities

From the **Returned Results Screen**, 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.

To create a Bookmark, the user will utilize the following steps:

1. Click on the  within the row of the opportunity you wish to bookmark. The icon is found on the right-hand side of the opportunity.
2. The 'Bookmark Program' dialogue box will appear.



   SPIN defaults to the 'Create new group' selection. 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.
3. Select either 'Create New Group' or 'Select Existing Group'
   a. For Create New Group enter a title for your group
   b. For Select Existing Group, click on the group you wish to add this bookmark to
4. Click the Save Changes button
5. Click Close

Opportunity Information Links

Within the **Returned Results Screen** 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.

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; and/or,
- Find similar opportunities and export them

Opportunity Window

Opportunity Description

Viewing the tabs from left to right, the Opportunity Description Tab appears first within the **Opportunity Information Window.**

The following information is displayed within this tab:

Section	Comments
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.

Eligibility Requirements

The second tab on the **Opportunity Information Window** is the Eligibility Requirements Tab.

The following information is displayed within this tab:

Section	Comments
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.
Proect 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.

Funding Guidelines

The third tab on the **Opportunity Information Window** is the Funding Guidelines Tab.

The following information is displayed within this tab:

Section	Comments
Funding Guidelines	This field provides a description of the Sponsor's funding guidelines for the opportunity.

Funding Amount	This shows the anticipated amount of funding available for the opportunity in the sponsor's native currency.
Duration	This field shows the duration of the opportunity, as established by the Sponsor.
Sponsor Currency Type	This field shows the currency type used by the Sponsor.
Total Potential Amount	This field shows the funding amount converted to the currency set in the Search Options.
Cost Sharing	This field displays whether or not the opportunity requires cost sharing.
Indirect Costs	This field displays whether or not the opportunity allows indirect cost recovery.

Sponsor Information

The final tab on the **Opportunity Information Window** is the Sponsor Information Tab.

The following information is displayed within this tab:

Section	Comments
Sponsor Contact Information	This field is a display-only text box containing the Sponsor's contact information, which includes the elements listed below. Contact Name Contact Title Contact Mailing Address Contact Phone Number Contact Fax Number Contact Email Address Sponsor/Contact Website URL Opportunity URL Sponsor Instructions

Bookmark Program

On the right side of the **Opportunity Information Window**, you will find the button. Clicking this button allows users to access the Bookmark Function of SPIN.

Information Boxes

On the right-hand side of the **Opportunity Information Window** two grey and white boxes are shown.

The topmost box is the Funding Opportunity Number box.

The following information is displayed:

Field	Comments
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).

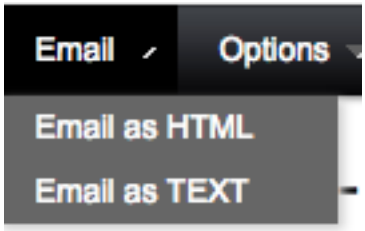
Deadline Date	This field contains deadline date for the applicant to apply for the opportunity.
Deadline Type	This field shows deadline type for the selected program.
Established Date	This field shows the date that the opportunity was established.
Last Revised	This field shows the date that the opportunity 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 FIU to help users apply for the opportunity.

Email Menu

Users can use the Email Menu within the **Opportunity Information Window** to send the information to themselves or others.

1. Hover your cursor over the balck arrow next the Email Menu
   The arrow will turn white, and two options will appear beneath it:



1. 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.
2. Choose your format by moving your cursor over the format name, until the selection turns yellow.
3. Click your mouse. The **Email Opportunity Window** opens up.
4. Type the email address of the person you want to send the information to.
5. Click Send.

Options

From the **Opportunity Details** window, 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.

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

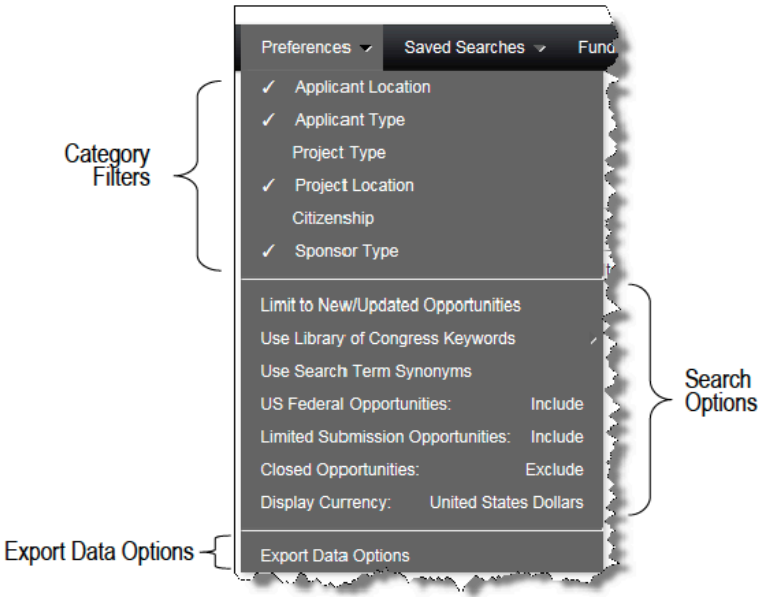
2. Click on '**Find Similar Opportunities'.** SPIN will generate a list of similar opportunities**.**

Preferences

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.

The Preference menu is divided into three main sections:

1. Category Filters
2. Search Options
3. Export Data Options



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.

This section contains the following:

Field	Comment
Applicant Location	Application Location is the first of the six Category Filters. It allows users to ensure that they only receive opportunities available to them based on 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.
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. Applicant Types are divided into Individual and Organizational applicants. Individual Applicants refer to

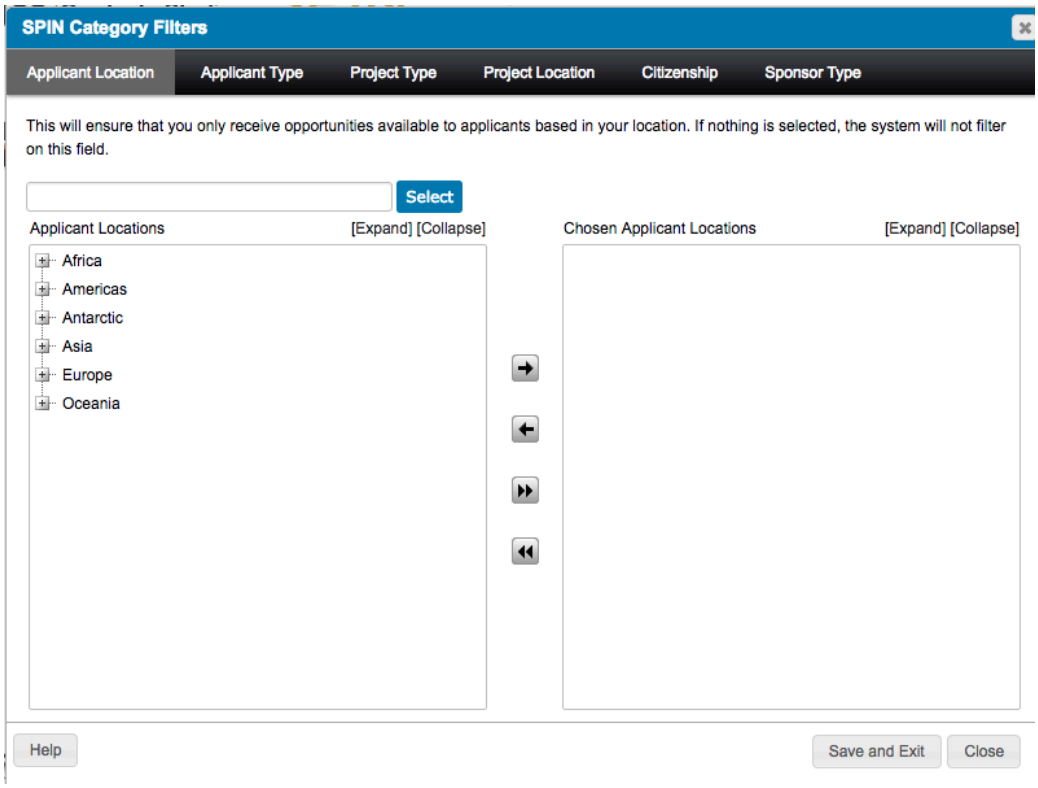
	the types of people who work or study within an institution (for example, doctoral students and senior faculty). Organizational Applicants refer to characteristics of the institution as a whole (for example, non-profit vs. profit, or academic vs. professional)
Project Type	This is used to determine what types of projects the sponsor is looking to fund, or what type of work the sponsor is intending be done by successful applicants. 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. Project Types are divided into five categories: Endowment; Individual Funding; Prize or Award; Project Resources; and, Temporary Government Assignments.
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. If nothing is selected, SPIN will not filter these characteristics.
Citizenship	This is used to determine if the sponsor maintains specific citizenship status requirements for their opportunities. Select those that apply to you. This filter allows a user to circumvent receiving any opportunities beyond their citizenship status. If nothing is selected, SPIN will not filter these characteristics.
Sponsor Type	This is used to filter the retrieved opportunities by a selected type of sponsor (i.e. US Federal, Charity, Research Council etc.). If nothing is selected, SPIN will not filter these characteristics.

<u>To access the Category Filters, the user will utilize the following steps:</u>

1. Hover your cursor over Preferences on the SPIN Toolbar
2. Choose a SPIN Category
3. A **SPIN Category Filters** popup will appear
4. Choose your filters

   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.



5. Click **Save and Exit**

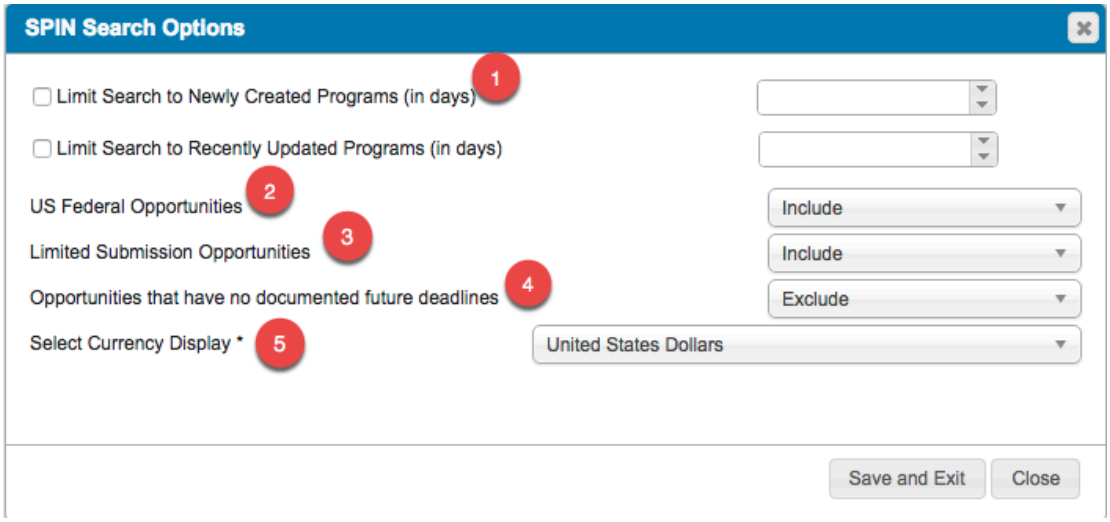
Search Options

The six Preference Menu search options are:

Field	Comment
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.
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

<u>To access the Search Options functionality, the user will utilize the following steps:</u>

1. From the Preference menu, select on any Search Option
2. A **SPIN Search Options** box will appear
3. All 5 options listed in the table above are now available for you to configure:



4. Click **Save and Exit**

Export Data Options

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

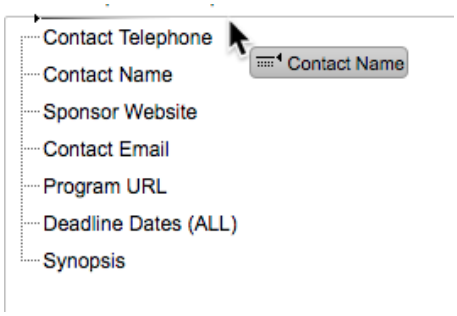
This popup is used to determine which columns, and in what order, fields will appear in the detail view of your returned results.

<u>To access the Export Data Options functionality, the user will utilize the following steps:</u>

1. Hover your cursor over the **Preferences Menu**, and select the Export Data Options as shown below.
2. Click the **Export Data Options** menu link and the Export Data Options Popup Window will appear.

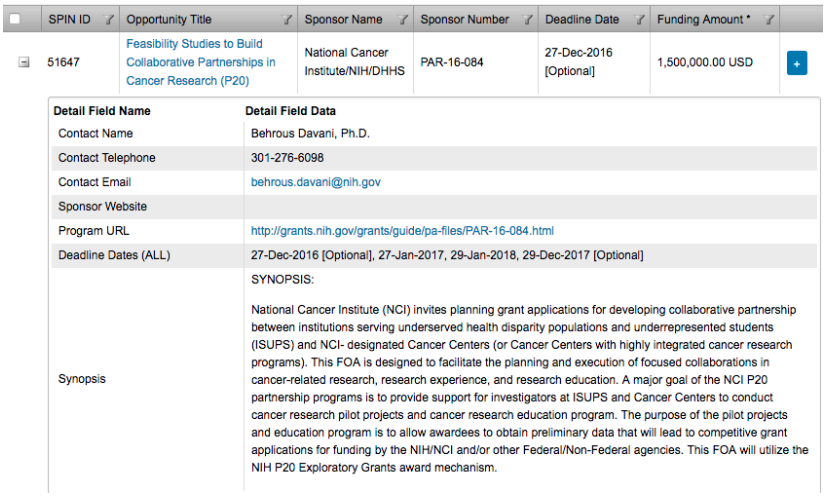
   Contact Name, Contact Telephone, Contact Email, Sponsor Website, Program URL, Deadline Dates, and Synopsis columns are set as defaults.

3. Use the arrows to move selected criteria from one the '**Available Export Data Options**' table to the '**Chosen Export Data Options**' table.
4. After making your selections, you may reorder the Chosen Export Data Options, by dragging and dropping the fields to the order of your preference.



5. Click on to retain any alterations you made **OR** click Close to close the window without saving your choices.

From this point forward, all of your returned results will contain the detail criteria you just selected beneath the View Details Arrows.



SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount *
51647	Feasibility Studies to Build Collaborative Partnerships in Cancer Research (P20)	National Cancer Institute/NIH/DHHS	PAR-16-084	27-Dec-2016 [Optional]	1,500,000.00 USD

Detail Field Name	Detail Field Data
Contact Name	Behrous Davani, Ph.D.
Contact Telephone	301-276-6098
Contact Email	behrous.davani@nih.gov
Sponsor Website	
Program URL	http://grants.nih.gov/grants/guide/pa-files/PAR-16-084.html
Deadline Dates (ALL)	27-Dec-2016 [Optional], 27-Jan-2017, 29-Jan-2018, 29-Dec-2017 [Optional]
Synopsis	SYNOPSIS: National Cancer Institute (NCI) invites planning grant applications for developing collaborative partnership between institutions serving underserved health disparity populations and underrepresented students (ISUPS) and NCI- designated Cancer Centers (or Cancer Centers with highly integrated cancer research programs). This FOA is designed to facilitate the planning and execution of focused collaborations in cancer-related research, research experience, and research education. A major goal of the NCI P20 partnership programs is to provide support for investigators at ISUPS and Cancer Centers to conduct cancer research pilot projects and cancer research education program. The purpose of the pilot projects and education program is to allow awardees to obtain preliminary data that will lead to competitive grant applications for funding by the NIH/NCI and/or other Federal/Non-Federal agencies. This FOA will utilize the NIH P20 Exploratory Grants award mechanism.

Saved Searches

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.

This menu contains two items: 1) Manage Saved Searches and 2) Public Searches

Manage Saved Searches

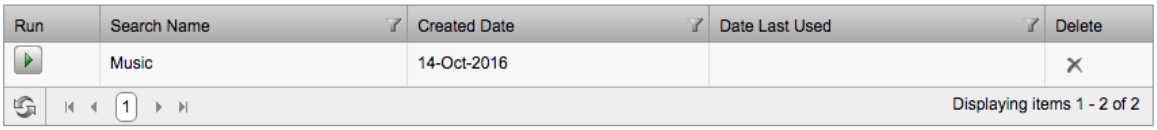
The first menu item in the Saved Searches Menu is Manage Saved Searches.

Within the functionality of this menu item, you may:

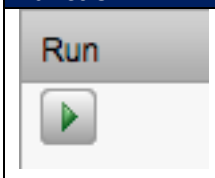
- See what searches are currently saved;
- See the dates that saved searches were created;
- See the date each search was last used;
- Delete saved searches with one click.

<u>To access the Saved Searches functionality, the user will utilize the following steps:</u>

1. In the **Saved Searches Menu** on the toolbar, select 'Manage Saved Searches'.
2. Once you have confirmed your intent to access the Manage Saved Searches function, the Available Saved Searches Screen opens to a display all the searches you have saved.



The following describes features and functions of the Available Saved Search Screen:

Function	Comment
	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.
	The Filter Icon 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.

Search Name	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.
Created Date	This is the date that the search criteria was 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.
Delete	Users can quickly delete any saved search. Click the 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. ****This is a **permanent action** that **cannot** be reversed.*
Save Changes	After making any changes, press the Save Changes button to retain your work.

Public Searches

The second option under the Searches Menu is Public Searches.

From here you may:

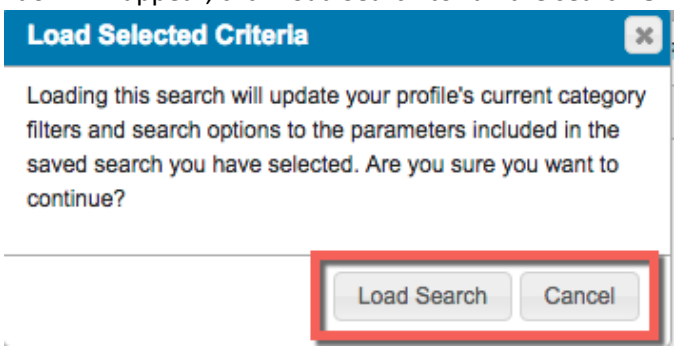
- See what searches other SPIN users have shared with you;
- See the dates that the shared searches were created;
- See the date each shared search was last used; and
- Learn who shared the search with you.

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

1. Hover your cursor over the **Saved Searches Menu** on the toolbar click on the '**Public Searches**' menu link.
2. The screen opens to a display of all the searches that your Administrator(s) have shared with you. Standard users can't share searches to the public searches area.

   The Public Searches 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.

3. Click Run 
4. The Load Selected Criteria window will appear, click Load Search to run the search **OR** Click Cancel



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.

Funding Alerts

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.

The menu contains only one item – **Manage Funding Alerts**.

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. 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.

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.

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 SMARTS Email Notifications are activated;
- Delete saved searches with one click.

<u>To access the Funding Alert functionality, the user will utilize the following steps:</u>

1. In the **Saved Searches Menu** on the toolbar, select '**Managed Saved Searches**'.
2. The **Manage Funding Alerts Page** will be displayed
3. 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).

The following table describes features of the **Manage Funding Alerts** page:

Field	Comment
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.
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	This is a two-part column. 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 the pull down menu on the left side of the column, and select either None, Daily or Weekly to choose how often to receive SMARTS email notifications for the selected search. Users ***must*** select either the Daily or Weekly option in order to activate SMARTS. The second column is the **Email Format column** which 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 to the pull down menu on the right side of the column to select either None, HTML, or Plain Text. Users **must** select either the HTML or Plain Text options in order to activate SMARTS.

	In order to receive SMARTS Email Notifications, you must select options from BOTH the SMARTS Automation and Email Format Pull-down Menus.
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.

Bookmarks

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.

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

The Bookmarks Menu contains two menu items:

1. Manage Bookmarks
2. Public Bookmarks

Manage Bookmarks

From this option within the Bookmarks Menu, users can access their previously bookmarked opportunities and Add Bookmark Groups or delete Bookmark Groups.

<u>To access the Manage Bookmarks functionality, the user will utilize the following steps:</u>

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

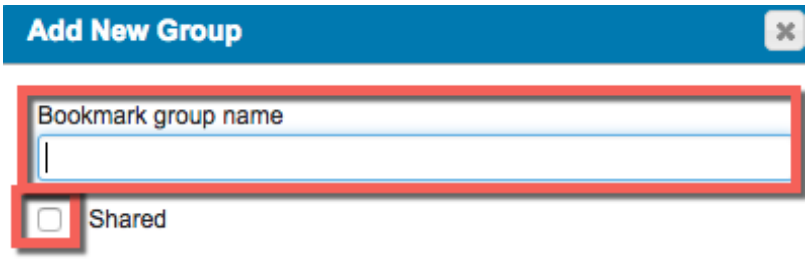
   The Bookmarked Opportunities screen opens to a display of all the opportunities the user has previously bookmarked.

2. On the Bookmarked Opportunities Screen, scroll down until you find the Bookmark Group you wish to view.
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 Bookmarked Group appears.

<u>To create a new bookmark group, the user will utilize the following steps:</u>

1. Go to the Bookmarks Menu on the SPIN Toolbar and click on the **Manage Bookmarks** item.
2. Click on 

the button.
3. The Add New Group popup will appear.
4. Type your desired group name into the blank field. Click on the checkbox to share the new group with other users.



5. Click the **'Save Changes**' button to save your selections ***OR*** click '**Cancel**' to revert back to the Bookmarked Opportunities screen without saving.

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 access Public Bookmarks, the user will utilize the following steps:

1. Go to the Bookmarks Menu on the SPIN Toolbar and click on the Public Bookmarks item
2. The Public Bookmarks screen opens to display a list of Bookmark Groups and Bookmarks shared by your institutional SPIN administrators.
3. To access any of these saved searches, click on the located to the left of any entry.

Help

The **Help Menu** is the last menu item on SPIN's main toolbar.

The menu contains three links which direct the user to some basic search help.

1. Basic Search Help
2. Funding Alerts Help
3. Training videos

Please Note: The content under the help menu varies from screen to screen.

The **Basic Search Help** option only appears when the user is utilizing any of the three search screens: Basic, Keyword and Advanced.

The **Manage Funding Alerts** Help, will appear when a user is on Manage Funding Alerts.

Appendix A: Program Criteria

Program Criteria	Comments
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 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 must be postmarked by in order to be accepted by the Sponsor. Receipt refers to the date that the Sponsor must receive a submission. Target refers to the date a Sponsor would prefer to receive 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.
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.
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.
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 filed, 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.
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.