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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 Document Guide

### 2.1 Illustrative Prompts

Illustrative prompts are provided throughout this document. They are defined below.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Key Concept" /></td>
<td>This icon is intended to draw attention to a core idea that is necessary to understand in order to fully utilize the software.</td>
</tr>
<tr>
<td><img src="image" alt="Important Update" /></td>
<td>This icon is intended to draw attention to changes in the software, compared to previous versions.</td>
</tr>
<tr>
<td><img src="image" alt="Critical Warning" /></td>
<td>This icon is intended to prevent users from taking actions that may create unintended consequences.</td>
</tr>
<tr>
<td><img src="image" alt="Please Note" /></td>
<td>This icon is intended to draw attention to specific information that users may find especially helpful.</td>
</tr>
<tr>
<td><img src="image" alt="Quick Tip" /></td>
<td>This icon is intended to draw attention to unique ways the software can be utilized more efficiently.</td>
</tr>
<tr>
<td><img src="image" alt="For Example" /></td>
<td>This icon is used when the content is describing a particular set of circumstances to show how the software can be used.</td>
</tr>
</tbody>
</table>
2.2 Style Conventions

**Bold Fonts**

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

Processes that require two or more steps are shown in bold text with a forward arrow to delineate the steps, i.e., “Select **Keywords > Search** to search for opportunities by keywords.”

**Bulleted Lists**

- Is used for an active instruction for using the software
- Is used for a cross-reference to another section of the manual
- Is used for text that begins with “In this example...” and which describes a particular set of circumstances to show how the software functions
- Is used for points of reminders that are not strong enough to warrant a cross-reference
2.3 Cross-Referencing & Links

This document is heavily cross-referenced to avoid the repetition of identical instructions.

Each cross-reference from one section of the document to another will contain both the section number and the title of the section as shown below. For example:

- See also Section 4.1.3—Activating SMARTS Email Notifications.

Cross-referencing within the same section will directly refer users to another portion within the same section by title only, as shown below. For example:

- See also the **Using the Details Arrow & Refresh Button** section above.

Cross-referenced section numbers are enabled with hyperlinks. Double click on any shown section number to automatically navigate to that section. The Table of Contents and Table of Figures entries are also linked to the actual content within the manual.
3 Logging In to SPIN

There are multiple ways to log in to SPIN. 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 the responsible administrator.

This section of the manual describes:

- the benefits to users who log in to SPIN, as opposed to using it anonymously;
- how to access SPIN from the eRA Portal;
- how to access SPIN from the InfoEd Global Website; and,
- how users can utilize SPIN without logging in.
3.1 Benefits of Logging In

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, as opposed to using SPIN as an anonymous user (see Section 3.4—Anonymous Access). Each available feature is described in this manual.

- A logged in user can retain parameters set from the Category Filters Menu across multiple sessions (see Section 5.4—Category Filters Menu).
- A logged in user can retain search and detail view parameters set from the Options Menu (see Section 5.5—Options Menu).
- A logged in user can save searches and SMARTS settings, and access them repeatedly from the Searches Menu (see Section 5.6—
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 5.7—Bookmarks Menu).

- A logged in user can save and share keyword groups from the **Keywords Menu** (see Section 5.9—Keywords Menu).
3.2 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 1 eRA Portal Window).

![eRA Portal Window](image)

From the eRA Portal Window:

- Click **Login**.

The following screen will appear:

![Login Screen](image)
- Click into the Username Field.
- Type your username.
- Click into the Password Field.
- Type your password.
- Click [Login].

You are now logged in to the eRA Portal. A new screen (shown below) will appear with open action items, and a calendar menu on the right-hand side of the page (not shown here).

![Initial portal page screenshot](image)

Your version of the initial portal page will have different colors and other features that are dependent upon your institution’s customizations of InfoEd Global software.

- Click [Find Funding].

The SPIN Home Screen will open (see Figure 3, The SPIN Home Screen, within Section 4). 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.
3.3 InfoEd Global Website Access

If an institution has a paid subscription for SPIN, its users can log in to SPIN from the InfoEd Global Website.

- Type www.infoedglobal.com into your web browser.

The InfoEd Global Website’s home page will appear, as shown in Figure 2.

Figure 2...................................................................................................................... InfoEd Global Website Home Page

- Click on **SPIN**

The SPIN Home Screen will open (see Figure 3).

- Click on **Sign In** from the upper, right-hand corner of the screen.

- The popup shown below will appear:

  ![Sign In Popup](image)

- Click into the Login ID Field.
- Enter your login identification.
- Click into the Password Field.
- Enter your password. You password will look like this: Password: ********, as you type.
- If you would like to your password to be automatically entered the next time you enter your Login ID, click into the checkbox in the Remember me? area.
- The indicates that you have opted to have the system remember your password.
- Click login.

The SPIN Home Screen will open (see Figure 3 The SPIN Home Screen, within Section 4). 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.
3.4 Anonymous Access

If an institution has a paid subscription for SPIN, users can use it without logging in, as long as their computer’s IP address is within the range the network administrator provided to InfoEd Global.

Please see Section 3.1—Benefits of Logging In to understand which elements of SPIN will not be available to you as an anonymous user.

- Type www.infoedglobal.com into your web browser.

The InfoEd Global Website’s home page will appear, as shown in Figure 2 within the previous section (entire page not pictured).

- Click on SPIN

The SPIN Main Screen will open (see Figure 3 The SPIN Home Screen, within Section 4). You now have access to SPIN. 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 Logging In).
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.

See Section 5—Searching for Opportunities for instructions on how to utilize these features while performing searches.

Figure 3 ............................................................................................................................ The SPIN Home Screen

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

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>InfoEd Spin Logo</td>
<td>Clicking on <img src="image" alt="InfoEd Spin Logo" /> returns users to a refreshed SPIN Home Screen.</td>
</tr>
<tr>
<td>User Name</td>
<td>The user’s name is shown to the left of the institution’s name, for example: William DeCocco InfoEd Global. No name will appear in this space if the user has accessed SPIN anonymously.</td>
</tr>
<tr>
<td>Institution Name</td>
<td>This is a standard header that shows the institution’s name, for example, InfoEd Global, regardless of whether a user is logged in.</td>
</tr>
<tr>
<td>Sign In/Out Link</td>
<td>If a user accesses SPIN anonymously, a link in the upper, right-hand corner of the page will look like this: <img src="image" alt="Sign In/Out Link" />. See Section 3.3—InfoEd Global Website Access for instructions on using the Sign In Popup.</td>
</tr>
<tr>
<td>Training Videos</td>
<td>This link <img src="image" alt="Training Videos" /> takes users to a page that contains several SPIN training videos. A table of contents and an image grid will appear with the available training topics.</td>
</tr>
<tr>
<td><strong>Admin Documents</strong>*</td>
<td>The <a href="#">Admin Documents</a> link takes users* to a PDF copy of the SPIN User Guide and other documentation. Prior to being navigated to the documents, users are asked to review and accept a legal disclaimer.</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td><strong>Search Mode</strong></td>
<td>This <a href="#">search mode</a> blender button allows users to select <a href="#">Advanced</a> to add additional criteria into the search bar field. See Section 5.2—Basic vs. Advanced Searches for information on how to use this feature.</td>
</tr>
<tr>
<td><strong>Search Field</strong></td>
<td>The blank field located beneath the SPIN Toolbar is where users type search terms. See Section 5—Searching for Opportunities.</td>
</tr>
<tr>
<td><strong>Clear Search Field Button</strong></td>
<td>Users can click <a href="#">×</a> located at the right edge of the search field to clear the search field of any terms that have been entered.</td>
</tr>
<tr>
<td><strong>Search Button</strong></td>
<td>Users click <a href="#">Search</a> to run a search after the search term has been entered. See Section 5—Searching for Opportunities.</td>
</tr>
<tr>
<td><strong>Save Button</strong></td>
<td>Users click to save and name search terms and criteria that were entered into search field. See Section 5.2.3—Saving Search Parameters for more information.</td>
</tr>
<tr>
<td><strong>Keyword Search Help</strong></td>
<td>When [?] (image) is clicked, users are provided with popup information about how the SPIN search engine functions with regard to inputted terms. See Section 5.1—Using Input Styles to Control Queries for more information.</td>
</tr>
<tr>
<td><strong>Logo Footer</strong></td>
<td>Clicking on the logo located at the bottom, right-hand corner of the page will take users back to the InfoEd Global Website’s home page.</td>
</tr>
</tbody>
</table>

*This link only appears if a user is signed in as an administrator.*
4.1 The SPIN Toolbar

The core functions of SPIN are accessed from the yellow toolbar on SPIN’s Home Screen. The toolbar is shown below in Figure 4—The SPIN Toolbar. 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 have titles that match each core toolbar component.

Figure 4............................................................................................................................................................................ The SPIN Toolbar

<table>
<thead>
<tr>
<th>Category Filters</th>
<th>Options</th>
<th>Searches</th>
<th>Bookmarks</th>
<th>Funding Guides</th>
<th>Keywords</th>
<th>Administration</th>
</tr>
</thead>
</table>

The SPIN Toolbar contains seven* menus:

- Category Filters—See Section 5.4
- Options—See Section 5.5
- Searches—See Section 5.6
- Bookmarks—See Section 5.7
- Funding Guides—See Section 5.8
- Keywords—See Section 5.9
- Administration—See Section 5.10*

*The Administration Menu only appears to users who are logged in as administrators. Likewise, the associated Admin Documents link is only available to administrators with institution-granted privileges.
5 Searching for Opportunities

SPIN is designed to be flexible and powerful in order to allow InfoEd Global’s clients easy access to every possible funding opportunity. The following SPIN functions are discussed in this section:

- how to use search term inputting features to control queries; and
- the difference between basic and advanced searches—how to conduct them; how to save parameters; and, how to activate SMARTS Email Notifications.
5.1 Using Input Styles to Control Queries

The SPIN system contains extensive records of opportunities that are organized into various fields, such as “Sponsor name,” for example. When a SPIN user enters a term(s) into the blank search field, SPIN scans every field in the entire database for that term(s) and returns as many matches as possible to the user.

SPIN runs on a modern, full-text search engine. That means it is designed to allow users to control the complexity of their searches, and thus the extent of their returned results. SPIN automatically invokes inflectional forms of entered words. For example, when a user enters the word “test” into the empty search field, SPIN will scan all available opportunities for the words: test, tests, tested, and testing.

Users can disable this function, and enable and disable others each time they enter a search term by changing the input style of the term. The use of OR “|” - + * < > ~ and ~” ” all have different effects. Figure 5 Search Term Input Styles describes what each word or symbol directs the SPIN search engine to do.

<table>
<thead>
<tr>
<th>Example Input</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scientific research</td>
<td>Searches for records containing 'scientific' and 'research' or their inflectional forms</td>
</tr>
<tr>
<td>Scientific OR research</td>
<td>Searches for records containing 'scientific' or 'research' or their inflectional forms</td>
</tr>
<tr>
<td>&quot;Scientific research&quot;</td>
<td>Wrapping terms in double quotes searches for records containing the phrase 'scientific research'</td>
</tr>
<tr>
<td>Scientific -research</td>
<td>Inserting a minus symbol before a term searches for records containing 'scientific' and not 'research'</td>
</tr>
<tr>
<td>Scientific +scientific</td>
<td>Inserting a plus symbol before a term performs search after disabling expansion for inflectional forms</td>
</tr>
<tr>
<td>Scientific*</td>
<td>Appending an asterisk to a term invokes a wildcard search searches for records containing 'scientific' and any suffix</td>
</tr>
<tr>
<td>&lt;scientific research&gt;</td>
<td>Wrapping terms in angled brackets searches for records containing 'scientific' and 'research' and ranks results by the proximity of the two.</td>
</tr>
<tr>
<td>~Scientific research</td>
<td>Inserting a bide searches for records containing 'scientific' or its related terms in the thesaurus, and 'research'</td>
</tr>
<tr>
<td>~&quot;Scientific research&quot;</td>
<td>Inserting a bide before a quoted phrase searches for records containing the phrase 'scientific research' or its related terms in the thesaurus</td>
</tr>
</tbody>
</table>

It is important for SPIN users to understand how changing the style of their search input terms can result in significant differences between sets of returned results, and thus in their ability to access funding opportunities.
To access information about altering the input styles of your search term while using SPIN:

- click on ?, located to the right of the Search and Save Buttons; and,
- review the resulting Keyword Search Help Popup Window to ascertain which type of input style most closely reflects your needs.

The Keyword Search Help Popup Window also describes SPIN’s integrated thesaurus, which automatically expands users' searches. For example, if a user activates the thesaurus, and then enters the term “cancer,” SPIN will search for all opportunities that match the terms, such as: cancer, carcinogens, chemotherapy, tumors, oncology, and other closely-related terms.

- See Section 5.5.1—Search Options for more information about using the integrated thesaurus.
5.2 Basic vs. Advanced Searches

The SPIN Home Screen defaults to a “BASIC” search mode. This mode is depicted by the software in the upper, right-hand corner of the screen as shown below.

![Basic Search Mode](image)

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

![Blank Field for Search Terms](image)

- See Section 5.2.1—Conducting a Basic Search for instructions on utilizing this search mode.

SPIN users have the option to switch the search mode to “ADVANCED.” The advanced search mode is depicted by the software in the upper, right-hand corner of the screen as shown below.

![Advanced Search Mode](image)

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

![Advanced Search Features](image)

- See Section 5.2.2—Conducting an Advanced Search for instructions on how to switch to and utilize the advanced search mode.
5.2.1 Conducting a Basic Search

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

From the SPIN Home Page:

- hover your cursor over and,
- click into the field;

The field will become empty as shown below.

Before entering your search term, it is important to consider how the way the term is inputted will affect the returned results. (see Section 5.1—Using Input Styles to Control Queries).

- Type your term or terms into the empty field.

   ✓ In this example, we want to search for opportunities related to amyotrophic lateral sclerosis. This condition is also known as ALS and 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.

   amyotrophic lateral sclerosis

- Click . A set of opportunities is returned, as (partially) shown below.

<table>
<thead>
<tr>
<th>SPIN ID</th>
<th>Opportunity Title</th>
<th>Sponsor Name</th>
<th>Sponsor Number</th>
<th>Next Deadline Date</th>
<th>Funding Amount</th>
<th>Bookmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>20139</td>
<td>Stuia Essay Award - An Award for ALS Research</td>
<td>American Academy of Neurology</td>
<td>30-Oct-2013</td>
<td>25,000.00 USD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13688</td>
<td>Research Grants</td>
<td>Frick (Bruce and Ilse) Foundation for ALS Research</td>
<td>31-Aug-2013</td>
<td>108,465.05 USD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12451</td>
<td>Humanitarian Award</td>
<td>International Alliance of ALS/MND Associations</td>
<td>01-Oct-2013</td>
<td>Not Specified</td>
<td></td>
<td></td>
</tr>
<tr>
<td>71697</td>
<td>Research Grants</td>
<td>Foundation for Progressive Supranuclear Palsy (PSP)</td>
<td>Not Specified</td>
<td>75,000.00 USD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>54803</td>
<td>Doctoral Research Award: Priority Announcement: Amyotrophic Lateral Sclerosis</td>
<td>Canadian Institutes of Health Research</td>
<td>01-Oct-2013</td>
<td>99,999.61 USD</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5.2.1.1 Progressive Text Feature

The SPIN Search Field is designed with a progressive text feature. When a user types a new term into the search field, previously used terms will appear below, if the first few letters of a new term match the first few letters of a previously-used term.

✓ In this example, we have already searched for opportunities related to amyotrophic lateral sclerosis, and we want to search using that term again.

As we begin to type the first few letters, the SPIN Search Field recognizes similarities between this search and previous efforts, and a list of closely-matched, recently-used terms appears below the search field, as shown above.

- Move your cursor downward on the list until the term you want turns blue.

- Click on the blue term.

Your term will now be auto-filled into the field, as shown below.

The Progressive Text Feature is also attached to the Advanced Search Mode and to the process for saving search parameters.

- See Section 5.2.2.1—Advanced Search Tool
- See Section 5.2.3—Saving Search Parameters
5.2.2 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.

- Click into BASIC in the upper, right-hand corner of the screen. The following popup will appear:

```
SPIN Search Options

Enabling the advanced search will remove current search parameters and results.
Are you sure you want to proceed?

Continue  Cancel
```

The popup appears only if users are already working in a screen with a list of opportunities showing. It is meant to remind users that if they progress to the Advanced Search Mode, that their list will disappear.

The results are retrievable at any time by going back to the Basic Search Mode and entering the same term again. If a user has not yet entered a search term and received returned opportunities, then this popup will not appear.

Click Continue to proceed to the Advanced Search Mode. The following will appear:

```
Search mode:  ADVANCED
```

The SPIN search field will now look like this:

```
AND  Search  ?
```

OR

Click Cancel to stay in Basic Search Mode and retain your list of returned opportunities.
5.2.2.1 Advanced Search Tool

The Advanced Search Tool, shown below as Figure 6 Advanced Search Tool, is the starting point for users who want to use the Advanced Search Mode. The tool contains the components listed below.

- AND/OR Function
- Add Expression Function
- Add Group Function; and
- Remove Item 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.

**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 inclusive 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.”
If your search criteria will be exclusive to more limited criteria:

- Hover your cursor next to **AND**. A black, downward-facing arrow will appear: **AND**.
- Click on the arrow, and pull down with your mouse until “OR” becomes highlighted in gray, as shown below.

- Click again. 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.

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. It 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 terms; and,
- a remove item function.

**Figure 7** ......................................................................................................................... Add Expression Function

To being using the Add Expression Function:
- Hover your cursor over 🔄. The following will appear:

![Image](AND.png)

Add Expression

- Click. A first-level criteria and search term bar will appear, as shown below.

![Image](OR.png)

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.
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 software as shown below.

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

<table>
<thead>
<tr>
<th>Full Program</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>CFDA Number</td>
<td></td>
</tr>
<tr>
<td>Contact Address</td>
<td></td>
</tr>
<tr>
<td>Contact City</td>
<td></td>
</tr>
<tr>
<td>Contact Country</td>
<td></td>
</tr>
<tr>
<td>Contact Email</td>
<td></td>
</tr>
<tr>
<td>Contact Fax</td>
<td></td>
</tr>
<tr>
<td>Contact Name</td>
<td></td>
</tr>
<tr>
<td>Contact Phone</td>
<td></td>
</tr>
<tr>
<td>Contact State</td>
<td></td>
</tr>
<tr>
<td>Cost Sharing</td>
<td></td>
</tr>
<tr>
<td>Cost Sharing Cap (%)</td>
<td></td>
</tr>
<tr>
<td>Deadline Type</td>
<td></td>
</tr>
<tr>
<td>Deadlines</td>
<td></td>
</tr>
<tr>
<td>Eligibility</td>
<td></td>
</tr>
<tr>
<td>Established Date</td>
<td></td>
</tr>
<tr>
<td>Follow-Up Date</td>
<td></td>
</tr>
<tr>
<td>Full Program</td>
<td></td>
</tr>
<tr>
<td>Funding Detail</td>
<td></td>
</tr>
<tr>
<td>Funding Opportunity Number</td>
<td></td>
</tr>
<tr>
<td>Indirect Cost Cap</td>
<td></td>
</tr>
<tr>
<td>Indirect Costs</td>
<td></td>
</tr>
<tr>
<td>Keywords</td>
<td></td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th><strong>CFDA Number</strong></th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cost Sharing</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Cost Sharing Cap (%)</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Deadline Type</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Deadlines</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Eligibility</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Established Date</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Follow-Up Date</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Funding Detail</strong></td>
<td>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 5.3.1.1).</td>
</tr>
<tr>
<td><strong>Indirect Cost Cap</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Indirect Costs</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Keywords</strong></td>
<td>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 5.9—Keywords Menu for more information about how to use SPIN Keywords and Keyword Groups.</td>
</tr>
<tr>
<td><strong>Limited Submission</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Objectives</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Open Application Period</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Revised Date</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>SPIN ID</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Sponsor</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Sponsor Mechanism</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Sponsor Program URL</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Sponsor Type</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Sponsor Website</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Synopsis</strong></td>
<td>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 5.3.1.1—Opportunity Information Links.</td>
</tr>
<tr>
<td><strong>Target Group</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Title</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Zip/Postal Code</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>

*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.
Now let’s conduct an advanced search.

✔ 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.

**Please Note**

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.

- Hover your cursor to the right of [Full Program](#). A black, downward-facing arrow appears, as shown below.

```
Full Program ▼
```

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

```
Full Program ▼ Contains
- Revised Date
- SPIN ID
- Sponsor
- Sponsor Mechanism
- Sponsor Program URL
- Sponsor Type
- Sponsor Website
```

- 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.

```
Full Program ▼ Contains
- Sponsor Type
```

- Click on your selection.

```
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.

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

<table>
<thead>
<tr>
<th>Full Program</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revised Date</td>
<td></td>
</tr>
<tr>
<td>SPIN ID</td>
<td></td>
</tr>
<tr>
<td>Sponsor</td>
<td></td>
</tr>
<tr>
<td>Sponsor Mechanism</td>
<td></td>
</tr>
<tr>
<td>Sponsor Program URL</td>
<td></td>
</tr>
<tr>
<td>Sponsor Type</td>
<td></td>
</tr>
<tr>
<td>Sponsor Website</td>
<td></td>
</tr>
</tbody>
</table>

- 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.

Choose your Sponsor Type:
- **Equal To**
  - Equal To
  - Not Equal To

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

A pull-down menu appears, as shown below.

- Use the scroll-bar to find the Sponsor Type you are interested in.

- Click on your selection. It will now appear in the search field, as shown below.
**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.

![Select Sponsor Type](image)

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 5.2.1.1—Progressive Text Feature
- See Section 5.2.3—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 you click **Search**.

![Popup Message](image)

Sponsor Type has an invalid selection.

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**. We must add additional limitations.

- See Section 5.5—Options Menu for more information on how user search option selections can affect returned opportunities.

- Click on **again. A new blank field will appear, as shown below.

![Search Options](image)

- In this example, in addition to looking for only United States Federally-Sponsored opportunities, we are going to look for opportunities related to HIV.
Type HIV into the second Add Expression Function field.

Click Search.

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

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

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.

**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 to keep our original criteria of US Federal Sponsor Type. We also want to keep 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.

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

- Hover your cursor next to **AND**. A black, downward-facing arrow will appear.
- Click on the arrow, and pull down with your mouse until “OR” becomes highlighted in gray, as shown below.

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

- 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.

- Click into the blank field and type AIDS.
• Click on again. Another new blank field will appear, as shown below.

- Type Lentivirus into the lowermost field.

Our full set of parameters now looks like this:

- Click .

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

- a US Federal Sponsor, AND;
- must contain the word HIV somewhere within the text of the Full Program, AND;
- must contain either the term AIDS OR Lentivirus within the Full Program text.

Key Concept

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.
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.

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.

• Click the located within . The field disappears as shown below.

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

• Click Search

Our Advanced Search is now telling SPIN 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.
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 located within . 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 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 may or may not increase, based on the comparative number of opportunities attached to the three terms.
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:

- 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.

- 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:

- Add a new OR group, and enter the term Language.
- Then add another expression: Poetry.

Our advanced search will now look like this:

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.
5.2.3 Saving Search Parameters

After SPIN users have designed and conducted custom searches via the Basic 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 their institution’s 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.

- See Section 5.2.4—Activating SMARTS Email Notifications.

From either the Basic or Advanced Search Mode:

- Click . A popup window will appear within the returned results, as depicted in Figure 8.

*Figure 8.....................................................................................................................Save Current Search Popup*

<table>
<thead>
<tr>
<th>Opportunity Title</th>
<th>Sponsor Name</th>
<th>Sponsor Number</th>
<th>Next Deadline Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amyotrophic Lateral Sclerosis Research Program—Therapeutic Development Award</td>
<td>Department of the Army</td>
<td>WB1XWAH-13-ALSRP-TIA</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Amyotrophic Lateral Sclerosis Research Program—Therapeutic Development Award</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exploratory/Developmental Projects in Transitional Research for Neuromuscular Disease (R21) (Temporarily Suspended)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amyotrophic Lateral Sclerosis Research Program (ALSRP) Therapeutic Development Award</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ancillary Studies in Clinical Trials of CNS/SPMS Disorders NINDS Accelerated Access Program (CSPA)</td>
<td>National Institute of Neurological Disorders and Stroke</td>
<td>PAR-09-263</td>
<td>Not Specified</td>
</tr>
</tbody>
</table>

*Please Note*

The Save Icon is only available to logged in SPIN users. Anonymous users cannot retain search parameters for future use.
5.2.3.1 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 an previously saved and named search (see Section 5.2.3.2—Overriding an Existing 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 word processing software.

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.

- Click into the blank Name Field.

    Name

- Type a name for your search.

    Save Current Search

    Name: amyotrophic lateral sclerosis

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.

- Avoid selecting a name from this list, and continue typing your new name.
This picklist shown above is a function of the Progressive Text Feature, which is attached to other elements of SPIN, and described in those associated sections.

- See Section 5.2.1.1—Progressive Text Feature
- See Section 5.2.2.1—Advanced Search Tool

Continuing with our example…

- Select your SMARTS Email Notifications preferences.
  - See Section 5.2.4—Activating SMARTS Email Notifications.
- If you have correctly entered the name that you want, click Save Changes.

OR

- If you have decided that you do not want to name these search parameters and save them, click Cancel.

When a user chooses Save Changes, SPIN retains the parameters of and name of his or her search, and stores them with the rest of the information associated with his or her login information. SPIN then redirects users back to the window with the returned results of that search.

**Using a Slightly Different Name to Reflect Altered Parameters**

SPIN users can set a baseline set of parameters for a particular topic, and then alter them in minor ways. By starting with the same saved search name, making minor changes to the parameters, and then altering the name just slightly prior to saving, users have an easy way to access the particular results they want at any time.

SPIN features numerous other ways to sort and filter search results, as described throughout this manual. Using the naming search parameters process is just one approach to returning opportunities to meet particular needs.

- In this example, we are going to build on our baseline amyotrophic lateral sclerosis saved search to create a similar but slightly altered set of parameters to save for future use.
- Follow the instructions in the section above to save a search named amyotrophic lateral sclerosis, or any term you would like to use.
Now let’s make a minor change in the parameters. From the Returned Results Screen (see Figure 9):

- Click Search Options.
- Change one of the criteria within the popup window.
  
  See Section 5.5—Options Menu for information on how to do so.

In this example we are going to assume we want a very similar search to our original. However, our institution conducts work both in the US and in the UK. So we are going to alter our search slightly by choosing United Kingdom Pounds instead of United States Dollars to see how much an opportunity is worth in that currency.

After making a change using the SPIN Search Options Popup Window:

- Click Save and Exit.

SPIN returns a new set of opportunities, but we still need to attach a name to the slight alteration we made.

- Click .
- Repeat the steps in the previous section.
  
  In this example, we are going to add the letters GBP to the end of our existing “amyotrophic lateral sclerosis” name to represent that it is the same search, with the only difference being the results returned show opportunity values in UK Pounds (or GBPs), not in dollars.

- Move your cursor to the end of the previously entered term and add whatever designation you would like. In this case: GBP.

  ![Save Current Search](image)

- If you have correctly entered the name that you want, click .

Because you have changed a search parameter criteria, SPIN will not override the previously-named search with this name, but will assign a whole new saved search, if you change the name in the name field. You now have two amyotrophic lateral sclerosis-related searches to use whenever you like.
If you inadvertently take steps that might compromise a previously saved search, the following warning box will appear:

You are about to overwrite this saved search with new criteria.
Do you want to continue?

- Click **Cancel** to avoid overwriting the previously saved search.

**OR**

- Click **OK** to proceed.
5.2.3.2 Overriding an Existing Search

Users can alter existing searches by saving changes they make to search parameters, without attaching a new name to them. This is referred to as overriding. Overriding can be useful if a user is accessing an outdated search, and wants to update the search parameters significantly.

Overriding an Existing Search involves either:

- users changing the parameters of a previously saved search then saving the changes *without changing the name*; or,
- users creating a new search and saving it using an existing search’s name.

**Overriding by Not Changing the Search Name**

Keeping in mind the steps outlined in the immediately previous subsections, a user who wanted to override an existing, saved set of search parameters would have to:

- Load an existing search in Basic or Advanced Search Mode.
  - See Section 5.6.1—Saved Searches
- Continue to the **Returned Results Screen** (see Figure 9).
- Change any of the search parameters, as described throughout this manual.
- Click on .
- Type the *same name of the original search* into the Save Current Search name field, as shown below.

The following popup appears:

*You are about to overwrite this saved search with new criteria.

Do you want to continue?*

- Click **OK**.

Following these steps results in the original search parameters for the saved search called *amyotrophic lateral sclerosis* to be overridden by whatever parameters were most recently entered or selected by the user.
Overriding by Using An Existing Search Name

In a very similar fashion, SPIN users can override an existing search by "starting from scratch." Keeping in mind the steps outlined in the immediately previous subsections, a user who wanted to override an existing, saved set of search parameters would have to:

- Run a new search in Basic or Advanced Search Mode.
- Click on \[ icon.\]
- Type the same name of an already existing search into the Save Current Search name field, as shown below.

```
Save Current Search

Name: Amyotrophic lateral sclerosis
```

The following popup appears:

```
You are about to overwrite this saved search with new criteria.

Do you want to continue?

OK Cancel
```

- Click \[ OK\].

Following these steps results in the new, unsaved search "becoming" the existing search of the same name. The parameters that were associated with that name have been completely overridden by whatever parameters were most recently entered or selected by the user.
5.2.4 Activating SMARTS Email Notifications

For each saved search, users can choose whether or not they want to receive SMARTS Email Notifications. SMARTS sends returned opportunities from saved search criteria to users’ inboxes on a daily or weekly basis.

- See also 5.6.2—SMARTS Email Notifications

Activating SMARTS is a process that requires users to make two choices within the Save Current Search Popup. From this popup:

- Click on the down arrow, and choose either HTML or Plain Text from the menu.

If you choose HTML, your SMARTS notifications might contain enabled hyperlinks. If you choose Plain Text, your SMARTS notifications will contain only text. Next, choose how often you want to receive email notifications:

- Click on the down arrow and choose either Daily or Weekly from the “Update frequency” pull-down menu.

In order to receive SMARTS Email Notifications, you must select options from BOTH pull-down menus within the Save Current Search Popup.

If do not choose to activate SMARTS now, you can do so later when accessing your saved search.

- See Section 5.6.1—Saved Searches
- See Section 5.6.2—SMARTS Email Notifications

- Click to close the popup. Your SMARTS preferences for this saved search will be retained; OR

- Click to close the popup window. Any changes you made within the window will not be saved.
5.3 Returned Results

After establishing search parameters using either the Basic 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.

![Returned Results Screen](image-url)
Returned results are organized in columns, as depicted by Figure 9.

<table>
<thead>
<tr>
<th><strong>SPIN ID</strong></th>
<th>An InfoEd-generated ID number associated with the opportunity.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Opportunity Title</strong></td>
<td>The name that the Sponsor gave the opportunity.</td>
</tr>
<tr>
<td><strong>Sponsor Name</strong></td>
<td>The name of the agency/organization Sponsoring the opportunity.</td>
</tr>
<tr>
<td><strong>Sponsor Number</strong></td>
<td>A Sponsor-generated number assigned to the opportunity. Not all opportunities have associated Sponsor Numbers.</td>
</tr>
<tr>
<td><strong>Deadline Date</strong></td>
<td>The last acceptable date for applicants to submit materials to the Sponsor. If an opportunity has more than one deadline, the date shown is the latest, or farthest away from the current date.</td>
</tr>
<tr>
<td><strong>Funding Amount</strong></td>
<td>The monetary valuation of the opportunity, shown in the user’s currency of choice (see Section 5.5—Options Menu).</td>
</tr>
</tbody>
</table>
5.3.1 Exploring & Organizing Results

SPIN’s Returned Results Screen (Figure 9) 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
Opportunity Count

In the upper, left-hand corner of the Returned Results Screen (Figure 9), 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 1,183 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.

Display Counter

In the lower, right-hand corner of the Returned Results Screen (Figure 9) 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 61st-70th opportunities, out of the total number of 1,183 returned.

Page Counter & Navigation Bar

In the lower, left-hand corner of the Returned Results Screen (Figure 9) 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 1,183 opportunities being returned. That means if we leave the number of results per page set as it is, there will be 119 screens available to view.

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

| ![Page Button] | Clicking this takes users back to the very first page of opportunities, at any time. |
| ![Prev Button] | 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. |
| ![Page Numbers] | 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. |
| ![Results Per Page] | 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, as described in the row above. |
| ![Next Button] | 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. |
| ![Last Button] | Clicking this button will take users to the very last page of opportunities. |
View Details Arrows, Sorting Arrows & Checkbox

View Details Arrows

Within the navigation, sort, and filter features on the Returned Results Screen (Figure 9) users will find arrows of two different styles, ▶ or ◀, located to the left side of the listed opportunity.

Clicking on these arrows once results in details about each opportunity appearing on the screen. Clicking again re-hides the details from view. The View Details Arrows 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 5.5.2—Detail View Column Options for a description of how to make these selections.

Sorting Arrows

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

- In this example, clicking the sorting arrow so that it appears to be pointing downward would result in the returned results being listed from Z to A, according to Sponsor Name.

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.
5.3.1.1 Opportunity Information Links

As shown in Figure 9, within the **Returned Results Screen** each Opportunity Title is presented in a hyperlinked format. Clicking on the links navigates users away from the results screen to new, unique screens that are particular to each 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.

- In this example, we are going to explore an opportunity within the returned results—SPIN ID #11135, as shown in Figure 9.

  - **Click on the linked opportunity title.**

![Opportunity Title](image)

A new, independent window opens up showing extensive information about this opportunity, as shown in Figure 10.

---

**Figure 10**

[Opportunity Information Window]

---

**Opportunity Title**

Amyotrophic Lateral Sclerosis Research Program—Therapeutic Idea Award

**Opportunity Description**

The ALSRP was established in 2007 to provide support for research of exceptional scientific merit aimed at preclinical assessment of therapeutics for amyotrophic lateral sclerosis (ALS). Appropriations for the ALSRP from FY07 through FY12 totaled $31.8 million (M). The FY13 appropriation is $1.5M. The goal of the ALSRP is to contribute to a cure for ALS by funding innovative preclinical research to develop new treatments for ALS.

**Program Objectives**

The TIA is designed to promote new ideas that are still in the early stages of development with the potential to yield highly impactful data and new avenues of investigation for novel therapeutics for ALS treatment. This mechanism supports conceptually innovative, high-risk/high-reward research that could ultimately lead to critical discoveries or major advancement in ALS therapeutics. Proposed research projects should include a well-formulated, testable hypothesis based on strong scientific rationale that holds translational potential to improve ALS treatment and/or advance a novel treatment modality. Projects that focus primarily on investigating the pathophysiology of ALS are outside the scientific scope of this mechanism.

Innovation and Impact are the most important aspects of the Therapeutic Idea Award. Innovation: Research deemed innovative may introduce a new paradigm, challenge current paradigms, introduce novel concepts or agents, or exhibit other uniquely creative qualities that may lead to potential therapeutics for ALS, and Impact: Research that has high potential to significantly impact development of therapeutics for ALS.
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 5.7—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.

### Opportunity Description Tab

Viewing the tabs from left to right, the Opportunity Description Tab appears first within the **Opportunity Information Window** (Figure 10), as shown below.

<table>
<thead>
<tr>
<th>Opportunity Description</th>
<th>Eligibility Requirements</th>
<th>Funding Guidelines</th>
<th>Sponsor Information</th>
</tr>
</thead>
</table>

The following information is displayed within this tab.

<table>
<thead>
<tr>
<th>Synopsis</th>
<th>This field shows the opportunity’s synopsis.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Objectives</td>
<td>This field shows the opportunity’s primary objectives.</td>
</tr>
<tr>
<td>Keywords</td>
<td>This field displays keywords that are related to the opportunity.</td>
</tr>
</tbody>
</table>

### Eligibility Requirements Tab

The second tab on the **Opportunity Information Window** (Figure 10) is the Eligibility Requirements Tab.

<table>
<thead>
<tr>
<th>Opportunity Description</th>
<th>Eligibility Requirements</th>
<th>Funding Guidelines</th>
<th>Sponsor Information</th>
</tr>
</thead>
</table>

The following information is displayed within this tab.

<table>
<thead>
<tr>
<th>Eligibility Requirements</th>
<th>This field displays the eligibility requirements for the applicant.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Applicant Location Requirements</strong></td>
<td>This field contains information about where applicants must live or work to be eligible to apply for the opportunity.</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Applicant Types Eligible</strong></td>
<td>This field shows the type(s) of applicants who are eligible to apply for the opportunity.</td>
</tr>
<tr>
<td><strong>Project Types Supported</strong></td>
<td>This field shows the project type(s) supported by the opportunity.</td>
</tr>
<tr>
<td><strong>Project Locations Allowed</strong></td>
<td>This field shows the acceptable project location(s) related to the opportunity.</td>
</tr>
<tr>
<td><strong>Citizenship Requirements</strong></td>
<td>This field shows the citizenship requirements that the applicant must satisfy in order to apply for the opportunity.</td>
</tr>
<tr>
<td><strong>Sponsor’s Target Groups</strong></td>
<td>This field denotes the primary group that will receive indirect benefit(s) as a result of the opportunity.</td>
</tr>
</tbody>
</table>

**Funding Guidelines Tab**

The third tab on the **Opportunity Information Window** (Figure 10) is the Funding Guidelines Tab.

The following information is displayed within this tab.

<table>
<thead>
<tr>
<th><strong>Funding Guidelines</strong></th>
<th>This field provides a description of the Sponsor’s funding guidelines for the opportunity.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Funding Amount</strong></td>
<td>This shows the anticipated amount of funding available for the opportunity.</td>
</tr>
<tr>
<td><strong>Duration</strong></td>
<td>This field shows the duration of the opportunity, as established by the Sponsor.</td>
</tr>
<tr>
<td><strong>Sponsor Currency Type</strong></td>
<td>This field shows the currency type used by the Sponsor.</td>
</tr>
<tr>
<td><strong>Total Potential Amount</strong></td>
<td>This field shows the funding amount converted to US Dollars.</td>
</tr>
<tr>
<td><strong>Cost Sharing</strong></td>
<td>This field displays whether or not the opportunity requires cost sharing.</td>
</tr>
<tr>
<td><strong>Indirect Costs</strong></td>
<td>This field displays whether or not the opportunity has any indirect costs associated with it.</td>
</tr>
</tbody>
</table>
Sponsor Information Tab

The fourth tab on the **Opportunity Information Window** (Figure 10) is the Sponsor Information Tab.

The following information is displayed within this tab.

<table>
<thead>
<tr>
<th>Sponsor Contact Information</th>
<th>This field is a display-only text box containing the Sponsor’s contact information, which includes the elements listed below.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>▪ Contact Name</td>
</tr>
<tr>
<td></td>
<td>▪ Contact Title</td>
</tr>
<tr>
<td></td>
<td>▪ Contact Mailing Address</td>
</tr>
<tr>
<td></td>
<td>▪ Contact Phone Number</td>
</tr>
<tr>
<td></td>
<td>▪ Contact Fax Number</td>
</tr>
<tr>
<td></td>
<td>▪ Contact Email Address</td>
</tr>
<tr>
<td></td>
<td>▪ Sponsor/Contact Website URL</td>
</tr>
<tr>
<td></td>
<td>▪ Opportunity URL</td>
</tr>
<tr>
<td></td>
<td>▪ Sponsor Instructions</td>
</tr>
</tbody>
</table>

Bookmark Program Button

On the right side of the **Opportunity Information Window** (Figure 10), the following appears:

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

- See Section 5.3.2—Bookmarking Opportunities for more information.
- See Section 5.7—Bookmarks Menu for more information.
Information Boxes

On the right-hand side of the **Opportunity Information Window** (Figure 10), two gold boxes are shown. The top box is shown below.

![Top box example]

The following information is displayed within this box.

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

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.

- See Section □—Contact Information
Email Menu

Users can use the Email Menu within the Opportunity Information Window (Figure 10) to send the information to themselves or others, as described below.

- 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.

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.

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

- Click your mouse. The Email Opportunity Window opens up, as shown below in Figure 11.
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.

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

- Click Send.

After you click send, SPIN returns to you the Opportunity Information Window (Figure 10).
**Options Menu**

From the **Opportunity Information Window** (Figure 10), 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™.

- 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.

- Choose the option by moving your cursor over the option, until the selection turns yellow.

- Click your mouse. The **Find Similar Opportunities Window** opens up, as shown in Figure 12, with the opportunities that SPIN generated listed within it.

**Figure 12**

<table>
<thead>
<tr>
<th>SPIN ID</th>
<th>Opportunity Title</th>
<th>Sponsor Name</th>
<th>Sponsor Number</th>
<th>Next Deadline Date</th>
<th>Funding Amount</th>
<th>Bookmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>34044</td>
<td>Amyotrophic Lateral Sclerosis Research Program (ALSRP) Therapeutic Development Award</td>
<td>Department of the Army</td>
<td>8R00000-12-ALSRR-TDA</td>
<td>Not Specified</td>
<td>Not Specified</td>
<td></td>
</tr>
<tr>
<td>90162</td>
<td>Exploratory/Developmental Projects in Translational Research for Neurological Disease (201) (Temporarily Suspended)</td>
<td>National Institute of Neurological Disorders and Stroke/NIMH/HHS</td>
<td>PAR-05-228</td>
<td>Not Specified</td>
<td>$275,000.00 USD</td>
<td></td>
</tr>
<tr>
<td>90163</td>
<td>Cooperative Programs in Translational Research for Neurological Disease (201) (Temporarily Suspended)</td>
<td>National Institute of Neurological Disorders and Stroke/NIMH/HHS</td>
<td>PAR-05-228</td>
<td>Not Specified</td>
<td>Not Specified</td>
<td></td>
</tr>
<tr>
<td>90009</td>
<td>Investigational Nongenetic Studies for Cancer Prevention (B01) (Temporarily Suspended)</td>
<td>National Institutes of Health/NIH</td>
<td>PAR-02-228</td>
<td>Not Specified</td>
<td>Not Specified</td>
<td></td>
</tr>
<tr>
<td>90271</td>
<td>NN02 Cooperative Program in Translational Research - Single-Component Research Projects (201)</td>
<td>National Institute of Neurological Disorders and Stroke/NIMH/HHS</td>
<td>PAR-02-228</td>
<td>Not Specified</td>
<td>Not Specified</td>
<td></td>
</tr>
</tbody>
</table>
Within this window SPIN users can use the sorting, grouping, and filtering features that are described throughout the rest of this manual.

- See Section 5.3.1.2—Sorting Results
- See Section 5.3.1.3—Filtering Results

Using the Export Function

The **Find Similar Opportunities Window** (Figure 12) has an Export Function 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.

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

  ![Export Button]

  To MS Word  
  To MS Excel  
  Export

- Choose MS Word™ or MS Excel™ by hovering over your selection until it turns gold.

  ![Export Button]

  To MS Word  
  To MS Excel

- Click.

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.

- Make your selections and click **OK** to complete the export.
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 13 Exported Opportunities in Excel Format.

![Figure 13](image)

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.

![Popup Message](image)

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.

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.
Administration Menu

From the Opportunity Information Window (Figure 10), administrators can explore the SMARTS history associated with the selected opportunity. You must be logged in as an administrator to use this feature.

- 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.

- Choose the option by moving your cursor over the option name, until the selection turns yellow.

- 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.

- 5.2.4—Activating SMARTS Email Notifications
- 5.10.4.2—Individual Reporting
- 5.10.4.8—Archived SMARTS Sheets
5.3.1.2 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 \textit{how the same total amount of data appears} on the screen. With filtering, users set parameters to \textit{limit the amount of data returned and change how it appears on the screen}.

- See Section 5.3.1.3—Filtering Results

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

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 9, the SPIN \textbf{Returned Results Screen} defaults to the following presentation order, from left to right: SPIN ID; Opportunity Title; Sponsor Name; Sponsor Number; Next Deadline Date; Funding Amount; and, Bookmark.

- 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.
  - 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 gold to light yellow.

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

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.
• 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 Next Deadline Date to appear first, which means it would need to be positioned before the SPIN ID Column.

[Image: screen showing column order]

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

[Image: screen showing column order after moving]

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

• Click to re-set the Returned Results Screen to the default column order.

Group By Feature

SPIN users can drag and drop columns within the Returned Results Screen (see Figure 9) 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.

✓ 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.

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

[Image: screen showing Sponsor Name column header selected]

The header color will change from gold to light yellow.

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

[Image: screen showing Group By Feature in action]

• Release the mouse button when the plus sign appears.
The Returned Results Screen changes significantly, as shown in Figure 14 below.

**Figure 14** Returned Results Sorted Using Group By

<table>
<thead>
<tr>
<th>Sponsor Name</th>
<th>SPIN ID</th>
<th>Opportunity Title</th>
<th>Sponsor Name</th>
<th>Sponsor Number</th>
<th>Next Deadline Date</th>
<th>Funding Amount *</th>
<th>Bookmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>11135</td>
<td>002556</td>
<td>Amorphous Latent Sclerosis Research Program - Therapeutic Development Award</td>
<td>Department of the Army</td>
<td>13-ALSFP-TBA</td>
<td>Not Specified</td>
<td>Not Specified</td>
<td></td>
</tr>
<tr>
<td>11135</td>
<td>002556</td>
<td>Amorphous Latent Sclerosis Research Program - Therapeutic Development Award</td>
<td>Department of the Army</td>
<td>13-ALSFP-TBA</td>
<td>Not Specified</td>
<td>1,500,000.00 USD</td>
<td></td>
</tr>
<tr>
<td>94844</td>
<td></td>
<td>Amorphous Latent Sclerosis Research Program - Therapeutic Development Award</td>
<td>Department of the Army</td>
<td>13-ALSFP-TBA</td>
<td>Not Specified</td>
<td>Not Specified</td>
<td></td>
</tr>
<tr>
<td>34186</td>
<td>00162</td>
<td>RFA-ES-13007 - Research Linking Environmental Exposure to Neurodegenerative Disease (NSU)</td>
<td>National Institute of Environmental Health Sciences/NIH/DHHS</td>
<td>RFA-ES-13007</td>
<td>30-Sep-2013</td>
<td>275,000.00 USD</td>
<td></td>
</tr>
<tr>
<td>94844</td>
<td>00162</td>
<td>RFA-ES-13007 - Research Linking Environmental Exposure to Neurodegenerative Disease (NSU)</td>
<td>National Institute of Environmental Health Sciences/NIH/DHHS</td>
<td>RFA-ES-13007</td>
<td>30-Sep-2013</td>
<td>275,000.00 USD</td>
<td></td>
</tr>
<tr>
<td>94844</td>
<td>00162</td>
<td>RFA-ES-13007 - Research Linking Environmental Exposure to Neurodegenerative Disease (NSU)</td>
<td>National Institute of Environmental Health Sciences/NIH/DHHS</td>
<td>RFA-ES-13007</td>
<td>30-Sep-2013</td>
<td>275,000.00 USD</td>
<td></td>
</tr>
</tbody>
</table>

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*).

- 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.

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

The header color will change from gold to light yellow.
- With the mouse depressed, drag the column into the Group By Header above, as shown below.

![Sponsor Name x Next Deadline Date](image)

- 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.

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.

![Sponsor Name x](image) ![Next Deadline Date x](image)

- Hover over the X; a transparent box will appear around the X, as shown below.

![Next Deadline Date X](image)

- Click. The criteria will disappear, as shown below.

![Sponsor Name x](image)

Users can also simply drag the criteria off of the header area to remove it.
5.3.1.3 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 9) has a filter function attached to it, with the exception of the Bookmark Column.

Figure 15 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.

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

- From the **Returned Results Screen** (see Figure 9), click within the Sponsor Name Column. A filtering menu will appear to the right of the column, as shown below.

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

- Click on the arrow located next to the field that reads: “Is equal to”

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

- Click on Contains.

- Place your cursor in the empty field and click.
• Type the word “Army.”

Show rows with value that
- Contains
- Army

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

• Click .

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

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

• 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.

• Click .
The menu will retract into the column header, and your original search results will reappear (see Figure 9). You can now apply another filter.

✓ 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 August 1st, and September 30th, 2013.

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

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

- 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 August 1st and September 30th, as the first step we need to direct SPIN to look for deadlines that are after July 31st.

- 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 July.

- Move your cursor over 31; it will turn yellow, and the date will appear beneath it, as shown below.

- Click on 31 to select the date.

- The date is auto-filled into the previously empty field.

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

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

We are going to choose October 1st as the end date. This ensures that all opportunities with deadline dates up through September 30th will be included.
Following the instructions provided for the first field in this example, choose October 1st.

Our completed filter now looks like this:

- Click.

SPIN has narrowed down our original returned results to nine opportunities that have deadlines between August 1st and September 30th 2013, as shown below.

<table>
<thead>
<tr>
<th>SPIN ID</th>
<th>Opportunity Title</th>
<th>Sponsor Name</th>
<th>Next Deadline Date</th>
<th>Funding Amount *</th>
</tr>
</thead>
<tbody>
<tr>
<td>01684</td>
<td>ALS Grants</td>
<td>Adams (Judith and Jean Pope) Charitable Foundation</td>
<td>15-Aug-2013</td>
<td>Not Specified</td>
</tr>
<tr>
<td>13885</td>
<td>Research Grants</td>
<td>Fark (Shane and lita) Foundation for ALS Research</td>
<td>31-Aug-2013</td>
<td>108,712.33 USD</td>
</tr>
<tr>
<td>34185</td>
<td>RFA-ES-13-007-RF Linking Environmental Exposure in Neurodegenerative Disease (R21)</td>
<td>National Institute of Environmental Health Sciences/NIH/NINDS</td>
<td>30-Sep-2013</td>
<td>275,000.00 USD</td>
</tr>
<tr>
<td>13711</td>
<td>Charles &amp; Shirley Graham MND Research Grant</td>
<td>Motor Neurone Disease Research Institute of Australia</td>
<td>30-Aug-2013</td>
<td>91,567.81 USD</td>
</tr>
<tr>
<td>13714</td>
<td>Nick Ryder Bercalla MND Research Grant</td>
<td>Motor Neurone Disease Research Institute of Australia</td>
<td>30-Aug-2013</td>
<td>91,567.81 USD</td>
</tr>
<tr>
<td>13715</td>
<td>MND Victims Research Grant</td>
<td>Motor Neurone Disease Research Institute of Australia</td>
<td>30-Aug-2013</td>
<td>91,567.81 USD</td>
</tr>
<tr>
<td>13721</td>
<td>Zuck MND Research Grant</td>
<td>Motor Neurone Disease Research Institute of Australia</td>
<td>30-Aug-2013</td>
<td>91,567.81 USD</td>
</tr>
<tr>
<td>756046</td>
<td>Quality of Life Grants</td>
<td>Renee (Christoph and Dana) Foundation</td>
<td>03-Sep-2013</td>
<td>25,000.00 USD</td>
</tr>
<tr>
<td>186320</td>
<td>MND/NND Association Lady Edith Wibben Joint Funded Clinical Research Training Fellowships</td>
<td>Medical Research Council of the United Kingdom</td>
<td>11-Sep-2013</td>
<td>Not Specified</td>
</tr>
</tbody>
</table>
SPIN users can utilize multiple add and clear multiple filters concurrently to narrow or expand their returned results.

- In our example, there were only nine 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.

  - Click into the filter function within the Funding Amount Column.
  
  - Using the previously provided instructions, choose “Is greater than” from the first field’s pull-down menu.

![Filter Function](image)

Note that the gray-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.

  - 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.

![Empty Field](image)

  - Click . SPIN applies another filter, as shown below.
We now have two returned results, as shown above. These opportunities both have deadlines between August 1st and September 30th, 2013, and have funding amounts over 100 thousand dollars. Additionally, they adhere to all other criteria dictated by our original search (see Figure 9—Returned Results Screen).

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 5.2.3—Saving Search Parameters
5.3.2 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 and/or groups of bookmarks are created, users must utilize the Bookmarks Menu during subsequent SPIN sessions to re-access them. This process is discussed in a different section of the manual.

❖ See Section 5.7—Bookmarks Menu

✓ In this example, we are going to continue using our twice-filtered results from the previous section of this manual to bookmark an NIH opportunity. Our twice-filtered results are shown again below.

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

SPIN defaults to the “Create new group” selection, as shown above. There is no existing Bookmark Group for our current topic, so we are going to stick with the default setting. (See below for instructions on adding a bookmark to an existing Bookmark Group).
- Place your cursor into the empty field and type a name for your new group.

✓ In this example we are going to create a Bookmark Group for Amyotrophic Lateral Sclerosis.

![Create new group](Amyotrophic Lateral Sclerosis)

- Click **Save**.

**OR**

- Click **Close** to not bookmark the opportunity.

✓ In this example, we clicked **Save**.

The screen returns back to the twice-filtered returned results. SPIN has created a new Bookmark Group with this name and this NIH opportunity filed within it. You can access this opportunity later by using the **Bookmark Menu**, as described in Section 5.7. 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.

- Click on **+** within the row that contains the NIH opportunity. The popup depicted below appears.

![Create new group](Select existing group)

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.

- Select existing group
  - Wind
  - Solar - future
  - Technology
  - Amyotrophic Lateral Sclerosis

If we want to change where this opportunity is filed, we have to de-select its current location, Amyotrophic Lateral Sclerosis, 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 Wind Bookmark Group, while also keeping it within the Amyotrophic Lateral Sclerosis Bookmark Group.

- Click in the checkbox to the left of the Wind selection.

- Click to add this opportunity to the Wind Bookmark Group.

OR

- Click to keep it only within the Amyotrophic Lateral Sclerosis Bookmark Group.

  In this example, we clicked .

This NIH opportunity has now been bookmarked into two different groups. We will re-access the opportunity within Section 5.7—Bookmarks Menu.
5.3.3 Exporting Results

As discussed in Using the Export Function subsection of Section 5.3.1.1—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 13 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 5.3.1.1. 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.

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.

In this example, we are going to export our twice-filtered Amyotrophic Lateral Sclerosis search to an Excel file.

- Click on the black arrow within **Export** in the upper, right-hand corner of the Returned Results Screen (Figure 9). The following will appear.

  ![Export Options]
  
  - Choose MS Word or MS Excel by hovering over your selection until it turns yellow.

  ![Export Options]

- Click.

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.
Make your selections and click **OK** 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 5.3.1.1—Opportunity Information Links, for a notation about the warning box associated with different versions of Word or Excel.

Note how in this export Columns E and F are slightly different than Figure 13 within Section 5.3.1.1. 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.

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.
5.4 Category Filters Menu

With the basics of SPIN addressed in the previous sections of this manual, this section and the six that follow it each correspond to the seven main menus within the software, as shown below.

The Category Filters Menu is the first on SPIN’s main toolbar, located just below the institution logo and user and login information areas. Category Filters are used to set parameters for the type of opportunities your institution will find relevant.

The Category Filters that logged-in users select from this menu will apply to every SPIN search that they conduct from that point forward. 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.

The Category Filters Menu contains five options, as listed below.

- Applicant Location
- Applicant Type
- Project Type
- Project Location
- Citizenship Status
5.4.1 Navigating within the Category Filters Popup

Although there are five variations of the SPIN Category Filters Popup (see Figure 16), each one shares common features that users will have access to no matter which menu option they are working within.

- In this example, we are just going to look at some of the basic navigation features common to all five options.

- Hover your cursor over the black arrow within the column. The arrow will turn white, and the five menu options will appear beneath the header, as shown below.

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

Figure 16 shows just one of the five 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.
Within every variation of the Category Filters Popup, there are two 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.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select</strong></td>
<td>Users enter their desired criteria into the blank search field and click Select. 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.</td>
</tr>
<tr>
<td><strong>Expand All</strong></td>
<td>The Expand All Button causes all arrows within the tables to point downward, revealing all the categories and subcategories beneath the main options. 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.</td>
</tr>
<tr>
<td><strong>Collapse All</strong></td>
<td>The Collapse All Button causes all the arrows within the tables to retract and all subheadings and subcategories to be hidden.</td>
</tr>
<tr>
<td><strong>Move Right</strong></td>
<td>The Move Right Button causes highlighted selections within the Available Options Table to be moved to the right, into the Chosen Options Table.</td>
</tr>
<tr>
<td><strong>Move Left</strong></td>
<td>The Move Left Button causes highlighted selections within the Chosen Options Table to be moved to the left into the Available Options Table.</td>
</tr>
<tr>
<td><strong>Move Group Right</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Move Group Left</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Save and Exit</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Exit</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Information</strong></td>
<td>The Information Button causes the Category Filters Information Box to popup. The popup provides basic information about how the Category Filters work.</td>
</tr>
</tbody>
</table>

Please Note: Users may click among the five 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 **Save and Exit**.
5.4.2 Applicant Location

Application Location is the first of the five 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.

- See Section 5.4.1—Navigating within the Category Filters Popup for instructions on how to access the Application Location Category Filter.
- See Figure 16 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.”

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.

- From within the SPIN Category Filters Popup (as shown in Figure 16) 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.
• Select your option from the menu that appeared.

OR

• Continue to type your desired Applicant Location.

• 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.

Click on .

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.
Use the blue scroll bar on the right-hand side of the Applicant Locations Table to find your selected location.

- Click once directly onto Massachusetts. The word will turn yellow as shown below.

- 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.

- 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.
5.4.3 Applicant Type

Applicant Type is the second of the five Category Filters. It is depicted in Figure 17 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 5.4.1—Navigating within the Category Filters Popup for instructions on how to access the Applicant Type Category Filter.

![Category Filters Popup—Applicant Type Tab](image)

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

- See Section 5.4.2—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).
5.4.4  Project Type

Project Type is the third of the five Category Filters. It is depicted in Figure 18 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 5.4.1—Navigating within the Category Filters Popup for instructions on how to access the Project Type Category Filter.

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.
5.4.5 Project Location

Project Location is the fourth of the five Category Filters. It is depicted in Figure 19 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 5.4.1—Navigating within the Category Filters Popup for instructions on how to access the Project Location Category Filter.

Figure 19.................................................................................... Category Filters Popup—Project Location Tab

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

- See Section 5.4.2—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.
5.4.6 Citizenship Status

Citizenship Status is the last of the five Category Filters. It is depicted in Figure 20 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 5.4.1—Navigating within the Category Filters Popup for instructions on how to access the Citizenship Status Category Filter.

![Figure 20](image)

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

- See Section 5.4.2—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.
5.5 Options Menu

The Options Menu is the second on SPIN's main toolbar, located just below the institution logo and login areas. This menu is used to set additional parameters, beyond Category Filters, for all opportunities.

The options that logged-in users select from this menu will apply to every SPIN search that they conduct from that point forward. 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 parameters.

The Options Menu contains two items, and is described in the corresponding subsections.

- Search Options
- Detail View Column Options

These can be used to expand or limit returned opportunities based on search terms, Sponsoring agencies, currencies, and other criteria. Altering any of the available options will change the quantity of and characteristics of all returned opportunities.
5.5.1 Search Options

The Search Options menu item is the first of the two available under the Options Menu. Figure 21 depicts the window that appears when users access this option.

- Hover your cursor over the Options Menu, and pull-down until the Search Options item turns yellow, as shown below.

- Click. The SPIN Search Options Popup Window will appear.

![Search Options Popup Window](image)

- 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 5.6.1—Saved Searches for more information on altering Search Options after the default options have been applied.
The following table describes each of the SPIN Search Options depicted in Figure 21, and explains how to manipulate them.

| **Expand Search Terms via Thesaurus** | 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. This is a function of Library of Congress keywords, as opposed to InfoEd Global’s thesaurus keywords. See Sections 5.9 and 5.9.1.1 for more information. |
| **Please Note** | InfoEd Global does not manage any of the keywords, or relationships among keywords. SPIN provides data from the US Library of Congress. The information is structured according to the Simple Knowledge Organization System (SKOS). See http://www.w3.org/TR/skos-primer/ for more information. See also Section 5.9.1.1 of this document. |
| **Limit Search to Newly Created Programs (in days)** | Checking this box 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. **If you check Limit Search to Newly Created Programs, the Limit Search to Recent Programs Option will become unavailable.** |
| **Limit Search to Recently Updated Programs (in days)** | This option pertains to opportunities that were updated a specific number of days ago. Opportunities may have been created more than a year ago, but as long as they were revised within the specified date range, SPIN will return results. Use the arrows to the right of the number of days to adjust the range of time. **If you check Limit Search to Recently Updated Programs, the Limit Search to Newly Created Programs Option will become unavailable.** |
| **Include/Exclude/Only 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. |
| **Include/Exclude/Only 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. |
| **Include/Exclude/Only Suspended Opportunities** | Suspended Opportunities are those that are normally hidden from returned results, for reasons such as:
- they were not offered the previous year;
- they are no longer available;
- the program was stalled due to funding issues (but not yet ended by the Sponsor); and/or,
- the Sponsor has already awarded the grant and will not issue another. Sometimes users may still wish to find information on such opportunities for planning or archiving purposes. Clicking the down arrow reveals a pull-down menu, allowing users to choose to “Include,” “Exclude,” or “Only find” suspended opportunities. |
### Include /Exclude/Only Opportunities that cannot currently be applied for

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.

### 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.

These same search options are available for application at any time during the search process. Accessing them from the **Options Menu** creates default settings for every search created by that user from that point forward.

Accessing the search options from returned opportunities within **Saved Searches** (see Section 5.6.1—Saved Searches) allows users to alter SPIN's default options, and/or the options they previously chose by using the **Options Menu**, and apply those changes to that saved search only. The user can then change the name of the search to retain their alterations (see Section 5.2.3—Saving Search Parameters).

- 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.
5.5.2 Detail View Column Options

The Detail View Column Options menu item is the second of the two available under the Options Menu. Figure 22 depicts the window that appears when users access this option.

- Hover your cursor over the Options Menu, and pull down until the Detail View Column Options item turns yellow, as shown below.

- Click. The SPIN Detail Columns Popup Window will appear.

![Detail Columns Popup Window]

The "*" expand icon on the left side of the search results grid shows a detail view. This is used to determine which columns, and in what order, will appear in the detail view. If nothing is selected, the system will not have items in detail view.
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 5.3.1—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 5.4.1—Navigating within the Category Filters Popup and 5.4.2—Applicant Location for a description of how to select and move criteria within the Detail Columns Popup Window.

In this example, we are going to select six criteria to show up when we use the View Details Arrows from returned searches.

- Follow the instructions provided in Section 5.4.2 to select and move the following criteria from the Detail View Column Options Table on the left, to the Chosen Detail View Columns Table on the right.
  - Contact Name
  - Contact Email
  - Eligibility
  - Follow-up Date
  - Deadline Dates (ALL)
  - Indirect Costs
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 Detail Columns Popup Window will appear as shown below.

<table>
<thead>
<tr>
<th>Detail View Column Options</th>
<th>Chosen Detail View Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Telephone</td>
<td>Contact Name</td>
</tr>
<tr>
<td>Sponsor Website</td>
<td>Contact Email</td>
</tr>
<tr>
<td>Program URL</td>
<td>Eligibility</td>
</tr>
<tr>
<td>Synopsis</td>
<td>Follow-up Date</td>
</tr>
<tr>
<td>Cost Sharing</td>
<td>Deadline Dates (ALL)</td>
</tr>
<tr>
<td>CFDA Number</td>
<td>Indirect Costs</td>
</tr>
<tr>
<td>Applicant Types</td>
<td></td>
</tr>
<tr>
<td>Target Groups</td>
<td></td>
</tr>
<tr>
<td>Geographic Locations</td>
<td></td>
</tr>
<tr>
<td>Project Types</td>
<td></td>
</tr>
<tr>
<td>Project Locations</td>
<td></td>
</tr>
<tr>
<td>Citizenship Restrictions</td>
<td></td>
</tr>
<tr>
<td>Keywords</td>
<td></td>
</tr>
<tr>
<td>Objectives</td>
<td></td>
</tr>
<tr>
<td>Funding</td>
<td></td>
</tr>
<tr>
<td>Established Date</td>
<td></td>
</tr>
<tr>
<td>Revised Date</td>
<td></td>
</tr>
<tr>
<td>Sponsor Type</td>
<td></td>
</tr>
</tbody>
</table>

- 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 5.3—Returned Results) will contain the detail criteria you just selected beneath the View Details Arrows, as shown below.

<table>
<thead>
<tr>
<th>SPIN ID</th>
<th>Opportunity Title</th>
<th>Sponsor Name</th>
<th>Sponsor Num</th>
</tr>
</thead>
<tbody>
<tr>
<td>84649</td>
<td>Sandra Daugherty Award for Excellence in Cardiovascular Disease or Hypertension Epidemiology</td>
<td>American Heart Association</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Detail Field Name</th>
<th>Detail Field Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Name</td>
<td></td>
</tr>
<tr>
<td>Contact Email</td>
<td><a href="mailto:scientificconferences@heart.org">scientificconferences@heart.org</a></td>
</tr>
<tr>
<td>Eligibility</td>
<td>Eligible applicants are researchers in a junior faculty position with five full time years of post-training research faculty experience and the abstract. All applicants and their sponsors must...</td>
</tr>
<tr>
<td>Follow-up Date</td>
<td>01-Aug-2014</td>
</tr>
<tr>
<td>Deadline Dates (ALL)</td>
<td>14-Oct-2013</td>
</tr>
<tr>
<td>Indirect Costs</td>
<td></td>
</tr>
</tbody>
</table>
5.6 Searches Menu

The 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 5.2—Basic vs. 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.

- Saved Searches
- Shared Searches
5.6.1 Saved Searches

The first option under the **Searches Menu** is Saved Searches. You must be logged in to use this option. From here 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.

You may also filter search results and delete saved searches. To access the **Saved Searches Screen**:

- Hover your cursor over the **Searches Menu** on the toolbar. The menu expands displaying two options—Saved Searches and Shared Searches.

  ![Saved Searches Screen](image)

- Hover your cursor over Saved Searches.
- When it turns yellow, click.

The screen opens to a display all the searches you have saved, as shown in Figure 23 below.

*Figure 23: Available Saved Searches Screen*
The following table describes features and functions of the Available Saved Searches Screen.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Run Button</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Filter Icon</strong></td>
<td>The Filter Icon shown to the left 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 5.3.1.3—Filtering Results for more information.</td>
</tr>
<tr>
<td><strong>Search Name</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Created Date</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Date Last Used</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Shared</strong></td>
<td>This column is only available to Administrators. By sharing a Saved Search, additional users within the same institution may utilize the search and run it when they so choose. Click the checkbox next to the Saved Search you wish you share and click the Save Changes Button. The search you shared will display on the Shared Searches Page. Click the checkbox again to unshare the search. See Section 5.6.3—Shared Searches for more information.</td>
</tr>
<tr>
<td><strong>Automated</strong></td>
<td>This column contains a pull-down menu which allows users to activate SMARTS (see Sections 5.2.4 and 5.6.2). If activated, users will receive updated results from their saved searches via email notifications. Click on the arrow next to and pull down and select either <strong>Daily</strong> or <strong>Weekly</strong> to choose how often to receive email notifications. Users must select one of these options in order to activate SMARTS.</td>
</tr>
<tr>
<td><strong>Email Format</strong></td>
<td>This column contains a pull-down menu which allows users to choose which type of email format they prefer for SMARTS Email Notifications (see Section 5.6.2). Click on the arrow and pull down to select either <strong>HTML</strong> or <strong>Plain Text</strong>. Users must select one of these options in order to activate SMARTS.</td>
</tr>
</tbody>
</table>
In order to receive SMARTS Email Notifications, you must select options from BOTH the Automated and Email Format Pull-down Menus.

**History**
This column only appears if you are logged in as an administrator. It provides access to the configuration history of SMARTS. See Section 5.10.4—SMARTS Administration, for more information.

**Delete**
Users can quickly any saved search. Click 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.

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

**Save Changes**
After making any changes, press the button to retain your work.

When users click , the popup shown below will appear.

Clicking Load Search will clear previously set criteria or category filters. Grid settings (such as columns chosen within the Detail View Column Options Screen) will also be lost if you proceed.

- Click to continue.

**OR**

- Click to return to the Available Saved Searches Screen (Figure 23).

Figure 24, shown below, depicts an example screen resulting from a loaded search.
See Sections 5.2.1—Conducting a Basic Search and 5.3—Returned Results, for more information about this screen.

**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.
5.6.2 SMARTS Email Notifications

SMARTS is an email notification feature that sends new or updated opportunity results from users’ saved searches directly to their email inboxes.

Users may choose to receive notifications on a daily or weekly basis. SMARTS can be activated in one of the ways described below.

- The first time search criteria are saved.
  - See Section 5.2.4—Activating SMARTS Email Notifications

- At any time from Searches > Saved Searches—Available Saved Searches. Use the Automated and Email Format Columns to do so.
  - See Section 5.6.1—Saved Searches
5.6.3 Shared Searches

The second option under the Search Menu is Shared Searches. You must be logged in to use this option. 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;
- learn who shared the search with you; and,
- learn whether or not SMARTS Email Notifications are activated—Administrators Only.

You may also filter search results and delete saved searches. To access the Shared Searches Screen:

- Hover your cursor over the Search Menu on the toolbar. The menu expands displaying two options—Saved Searches and Shared Searches.
- Hover your cursor over Shared Searches.
- When it turns yellow, click.

The screen opens to a display of all the searches that others at your institution have shared with you, as shown in Figure 25 below.

Figure 25 ................................................................................................................. Available Shared Searches Screen

<table>
<thead>
<tr>
<th>Available Shared Searches</th>
<th>Run</th>
<th>Search Name</th>
<th>Created Date</th>
<th>Last Used</th>
<th>Shared By</th>
<th>History</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>1 - Non-US Citizen Postdoctoral</td>
<td>12-Feb-2012</td>
<td>03-Jul-2013</td>
<td>Jeter, David</td>
<td>![Icon]</td>
</tr>
<tr>
<td></td>
<td>5</td>
<td>5 - STEM</td>
<td>13-Feb-2012</td>
<td>24-Jul-2013</td>
<td>Jeter, David</td>
<td>![Icon]</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>6 - Limited Submission Renewable Energy</td>
<td>13-Feb-2012</td>
<td>14-Aug-2013</td>
<td>Jeter, David</td>
<td>![Icon]</td>
</tr>
<tr>
<td></td>
<td>7</td>
<td>Medical Education, Upcoming</td>
<td>14-Feb-2012</td>
<td>26-Jun-2013</td>
<td>Jeter, David</td>
<td>![Icon]</td>
</tr>
</tbody>
</table>

- Please see the previous section, Section 5.6.1—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 users who shared searches; and,
- it lacks the delete feature, as you cannot delete another user's saved search.

When users click ![file icon](image) from the **Shared Searches Screen**, the popup shown below will appear.

```
Load Selected Criteria

Loading this search will update your profile’s current category filters and search options to the parameters included in the saved search you have selected. Are you sure you want to continue?

[Load Search] [Cancel]
```

Clicking Load Search will clear your previously set criteria or category filters. Grid settings (such as columns chosen within the Detail View Column Options Screen) will also be lost if you proceed. Your settings will be overridden by whatever setting the person who shared the search with you has set up.

- Click ![file icon](image) to continue.

**OR**

- Click ![file icon](image) to return to the Available Shared Searches Screen (Figure 25).

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.
5.7 Bookmarks Menu

The Bookmarks Menu is the fourth on SPIN’s main toolbar, located just below the institution logo and user and login information areas. 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. Users must be logged-in to use the Bookmarks Menu.

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

- See Section 5.3.2—Bookmarking Opportunities, for information about how to create bookmarks.

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

- Bookmarked Opportunities
- Shared Opportunities
5.7.1 Bookmarked Opportunities

From this option within the **Bookmarks Menu**, users can access their previously bookmarked opportunities. To do so:

- Hover your cursor over the Bookmarks Menu on the toolbar. The menu expands, displaying two options—Bookmarked Opportunities and Shared Opportunities.

- Hover your cursor over Bookmarked Opportunities.

- When it turns yellow, click.

The screen opens to a display of all the opportunities you have previously bookmarked, as shown in Figure 26 below. The figure shows that this user has also previously set up groups of bookmarks.

---

**Figure 26**

As an example, in Section 5.3.2—Bookmarking Opportunities, we set up two separate groups of bookmarks to contain the same opportunity. The groups were “Wind” and “Amyotrophic Lateral Sclerosis.” The opportunity was NIH-funded, with the SPIN ID# 34186. We can now re-access that opportunity from within either bookmark group, as shown below.
From the Bookmarked Opportunities Screen, scroll down using the blue scroll bar, until you see the group “Wind.”

- Hydrogen
- music limited submission
- New Investigator
- Language
- Pathology
- Cardiology

Wind
- Solar - future
- Technology

Amyotrophic Lateral Sclerosis

Click on 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.

<table>
<thead>
<tr>
<th>SPIN ID</th>
<th>Opportunity Title</th>
<th>Sponsor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>30732</td>
<td>Research Grant</td>
<td>Australian Wound Center - South Australia</td>
</tr>
<tr>
<td>32246</td>
<td>RFP - Amendment - Turkey - Smart Grid Upgrades to the Tesla Electricity Transmission Network Feasibility Study</td>
<td>U.S. Trade and Dev</td>
</tr>
<tr>
<td>32729</td>
<td>MARC Undergraduate Student Training in Academic Research (U-STAR) National Research Service Award (NRSA) Institutional Research Training Grant (T34)</td>
<td>National Institute of Health National Science Foundation (NSF)</td>
</tr>
<tr>
<td>34186</td>
<td>RFA-ES-13007 - Research Linking Environmental Exposure to Neurodegenerative Disease (N21)</td>
<td>National Institute of Health National Science Foundation (NSF)</td>
</tr>
</tbody>
</table>

We can see that our previously bookmarked opportunity #34186 is there, waiting for us to re-access it. If we check the “Amyotrophic Lateral Sclerosis” group, we will find it there as well.
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 5.3—Returned Results and 5.6.1—Saved Searches, for more information on how to use this screen.

The Add New Funding Group function is the only difference between the functionality of this screen versus other similar screens within SPIN. To create a new bookmark group:

- Click Add New Funding Group. The Add New Group Popup Window appears, as shown below.

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.

- See Section 5.7.2—Shared Opportunities for more information about sharing bookmark groups with other users.
• Click to save your selections.

OR

• Click to revert back to the Bookmarked Opportunities Screen, without saving your choices.

Clicking results in the new group name appearing in your bookmarked opportunities, as shown below.

- Solar - future
- Technology
- Amyotrophic Lateral Sclerosis
- Crohn's Disease

- You may also click to choose from a pre-existing list of titles.
5.7.2 Shared Opportunities

From this option within the Bookmarks Menu, administrators can access those opportunities that they have previously shared with other SPIN users. To do so:

- Hover your cursor over the **Bookmarks Menu** on the toolbar. The menu expands, displaying two options—Bookmarked Opportunities and Shared Opportunities.

- Hover your cursor over **Shared Opportunities**.

- When it turns yellow, click.

The screen opens to a display of all the opportunities you have previously shared, organized by group, as shown in Figure 27 below.

*Figure 27* ............................................................................................................................. Shared Opportunities

<table>
<thead>
<tr>
<th>Group Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>STTR or SBR</td>
<td></td>
</tr>
<tr>
<td>Chemistry Department - Fellowships</td>
<td></td>
</tr>
<tr>
<td>Chemistry Department - Equipment Grants</td>
<td></td>
</tr>
<tr>
<td>Chemical Engineering Awards</td>
<td></td>
</tr>
<tr>
<td>Solar Power</td>
<td></td>
</tr>
<tr>
<td>Transportation Railroad</td>
<td></td>
</tr>
<tr>
<td>Cancer Biology</td>
<td></td>
</tr>
<tr>
<td>standard</td>
<td></td>
</tr>
</tbody>
</table>

**Please Note** The only SPIN users that can share opportunities are administrators.

This screen utilizes View Details Arrows, and is organized similarly to other screens within SPIN.

- See Sections 5.3—Returned Results and 5.6.1—Saved Searches, for more information on how to use the screen.
5.8 Funding Guides Menu

The Funding Guide Menu provides users with an up-to-date list of United States Federally-Sponsored opportunities. Although these same opportunities may appear during other search activities, this feature of SPIN is meant to provide a more direct route to these grants, as well as to Federal Register announcements.

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

- Browse FedBiz Opps
- US Federal Register Guide
5.8.1 Browse Federal Business Opportunities

The Browse FedBizOpps Option (see Figure 28) 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:

- Hover your cursor over the Funding Guides Menu on the toolbar. The menu expands, displaying two options—Browse FedBizOpps and US Federal Register Guide.

- Hover your cursor over Browse FedBizOpps.

- When it turns yellow, click.

The screen opens to a display of Federally-Sponsored opportunities, organized by descending date, as shown in Figure 28 below.

*Figure 28: US Federal Business Opportunities*
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 5.3.1—Exploring & Organizing Results, for more information on how to sort, filter, and manipulate the data on the US Federal Business Opportunities Screen.
- See Section 5.3.3—Exporting Results, for more information on how to export data from this screen.
5.8.2 US Federal Register Guide

The US Federal Register Guide 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:

- Hover your cursor over the **Funding Guides Menu** on the toolbar. The menu expands, displaying two options—Browse FedBizOpps and US Federal Register Guide.

<table>
<thead>
<tr>
<th>Funding Guides</th>
<th>Keyword</th>
</tr>
</thead>
<tbody>
<tr>
<td>Browse FedBizOpps</td>
<td></td>
</tr>
<tr>
<td>US Federal Register Guide</td>
<td></td>
</tr>
</tbody>
</table>

- Hover your cursor over US Federal Register Guide.
- When it turns yellow, click.

The screen opens to a display of Federally-Sponsored opportunities, organized by descending date, as shown in Figure 29 below.

![US Federal Register Guide](image.png)

**Figure 29**

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 5.3.1—Exploring and Organizing Results). A direct link to the Federal Register Website is also provided at the top of the page.
5.9 Keywords Menu

The Keywords Menu provides users with access to additional terms and/or words similar to their target search terms which may help them find additional opportunities.

This feature of SPIN is not the same as the previous GENIUS SMARTS Keywords Feature. Keywords accessed in this menu are based on Library of Congress data.

SPIN’s Keywords Menu data is based on the United States Library of Congress, which contains over 300,000 terms.

The Keywords Menu contains three options, as listed below, and described in the corresponding subsections.

- Search
- Keyword Groups
- Shared Keyword Groups

InfoEd Global does not manage any of the keywords, or relationships among keywords. SPIN provides data from the US Library of Congress. The information is structured according to the Simple Knowledge Organization System (SKOS). See http://www.w3.org/TR/skos-primer/ for more information. See also Section 5.9.1.1 of this document.
5.9.1 Search

From this option within the **Keywords Menu**, 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 use the Search Option:

- Hover your cursor over the **Keywords Menu** on the toolbar. The menu expands, displaying three options—Search, Keyword Groups, and Shared Keyword Groups.

- Hover your cursor over Search.

- When it turns yellow, click.

A new window containing three tabs automatically opens. As shown in Figure 30 below, the Search Tab is automatically selected.

Users should enter broad search terms into the blank field in this window. The feature functions to expand a user’s vision of available search terminology. Therefore, entering specific terms will not help support this goal, and the number of returns provided by SPIN will be low.
In this example, we are going to enter the term HIV into the search field. We are trying to get new ideas for terms we can use to conduct subsequent SPIN searches.

- Place your cursor into the blank search field, and click.
- Type HIV.
- Click ☑. The screen below the blank field will fill with information, as shown below in Figure 31.
Many of the navigation, sorting, and filtering features on this screen are similar to previously described windows and screens within SPIN.

- See Sections 5.3—Returned Results and 5.6.1—Saved Searches, for more information on how to use the screen.
The following table describes additional features of the Returned Term Labels Screen.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Show unused terms in search results</strong></td>
<td>The default search returns keywords that are associated with opportunities in the SPIN database. Checking this box will direct the software to expand returns to include keywords not associated with SPIN opportunities.</td>
</tr>
<tr>
<td><strong>Hide terms already selected from search results</strong></td>
<td>Checking this box will hide keywords from the search that are already are contained within the user’s saved groups. See Section 5.9.2—Keyword Groups, for more information.</td>
</tr>
<tr>
<td><strong>(Select)</strong></td>
<td>Clicking the checkbox within the yellow header of the first column of the grid selects all of the terms on that specific page. Clicking a checkbox beside a Term Label selects that specific Term Label. Click again to make de-selections.</td>
</tr>
<tr>
<td><strong>Term Label Column</strong></td>
<td>The Term Label Column contains a list of all the keywords related to the term that the user entered into the blank field. Clicking on any linked term label opens a sidebar box containing the following categories: preferred label; alternate label; broader terms; narrow terms; and, related terms. Some of these terms are hyperlinked. A link to the Library of Congress is also included. The sidebar box is discussed in greater detail below.</td>
</tr>
<tr>
<td><strong>Occurrences</strong></td>
<td>This column shows the number of SPIN opportunities associated with the Term Label in the same row.</td>
</tr>
<tr>
<td><strong>Include Related</strong></td>
<td>When this option is selected, the search results will automatically include SPIN opportunities which contain terms related to the Term Label of the same row. For example, if a user is working in a row that contains a Term Label “Fire,” and they check “Include Related,” their results might include opportunities with keywords such as flames or smoke.</td>
</tr>
<tr>
<td><strong>Include Broader</strong></td>
<td>Users can add “levels” the their keyword searches. By checking this option, and using the numerical selection tool to the right of it, users can broaden their searches by a specific number of levels. This means that SPIN will use Library of Congress data organized within a SKOS framework (see above) to select the two next higher (more broad) tiers of terms and incorporate those results into the returns. See Section 5.9.1.1 below for more information.</td>
</tr>
<tr>
<td><strong>Include Narrower</strong></td>
<td>By checking this option, and using the numerical selection tool to the right of it, users can narrow their searches by a specific number of “levels.” This means that SPIN will use Library of Congress data organized within a SKOS framework (see above) to select the two lower (more specific) tiers of terms and incorporate those results into the returns. See Section 5.9.1.1 below for more information.</td>
</tr>
</tbody>
</table>
Returning to our HIV example, the Returned Term Labels Window showed 30 results.

- Use the Page Navigation Tool to change the window to show all 30 results, on one page, instead of just 10.

- Click on the arrow next to the number 10 and pull down to select 50.

The page will update to include all rows, and the lower right-hand corners will reflect the change, as shown below.

Now we can work with all of our returned Term Labels on one screen.

Before we proceed with taking a look at some of the keywords we can use to expand our future SPIN searches, let's save the Term Labels we have just selected so we can access them again.

For our current purposes, we are going to focus on women. Therefore, we are going to use the left column checkbox to select only those Term Labels that apply to women, as well as those that include more general terms (for example, those not specifically targeting other groups, such as men or children).
- Click into the boxes that are located to the left of Term Labels related to women specifically, and those that are not specifically related to men and children.

  ![Term Label Table]

- Click [Save Selections and Continue]. The popup shown below will appear. The “Create new group” option is selected by default.

  ![Keyword Group Name]

- Type “HIV Women” into the blank field.

  ![Create new group]
Click **Continue**.

HIV Women is now a Saved Group. Users can access the selected Term Labels at any subsequent point in time.

- See Section 5.9.2—Keyword Groups for more information.

**OR**

- Click **Exit**. The following popup will appear.

![Confirm Exit Popup](image)

- Click **Discard Changes** to Exit the page without saving your selections, or click **Cancel** to stay on the page.

If the user had selected the “Use existing group” option within the Keyword Group Name Popup (shown above), the selected Term Labels would be added to whatever existing group name they chose. The Term Labels that were previously in that group would not be overridden by the new batch, and would remain located there.

As mentioned previously, when accessing the Keywords Menu, users are working with Library of Congress-generated terminology. Keeping that in mind, there are several ways this menu can help users generate more potential terms to use in their subsequent SPIN searches. These include:

- clicking on the linked numbers within the Occurrences Column to review SPIN opportunities related to the Term Label shown in the same row;
- clicking on the linked Term Label and reviewing the Sidebar Popup Box for Alternate, Broader, Narrow, and/or Related Terms;
- clicking on the hyperlinks within the Sidebar Popup;
- clicking on the Library of Congress Link to review more information about this particular term; and,
- using the Include Broader and Include Narrower Options to review how results change (see Section 5.9.1.1, below).
5.9.1.1 Understanding Broader and Narrower Options

The last two rows of the table in the previous section describe unique features within the Returned Term Labels Screen. Instead of aiming to have SPIN return multiple keywords, a user can choose one Term Label and use the Include Broader and/or Include Narrower Features to greatly expand or contract their search results.

As mentioned previously, the terminology does not originate with SPIN, rather it hails from the Library of Congress. The hierarchy of terms is arranged according to the SKOS framework. Users can look these entities up online to understand what each level might include—each level is not necessarily synonymous with just one term.

Therefore the returned results from broadening or narrowing the keyword search using these features will vary widely according to the particular ruling Term Label. For example, the sidebar box that appears when the Term Label “HIV-positive persons” is clicked is shown below. In this particular case, there is only one broader term, but several narrower terms.

![Sidebar box for HIV-positive persons showing broader and narrower terms](image)

**Preferred Label**
- HIV-positive persons

**Alternate Label**
- HIV infections—Patients, HIV patients, HIV seropositive persons, Seropositive persons, HIV

**Broader Terms**
- Patients

**Narrower Terms**
- HIV-positive children, HIV-positive youth, HIV-positive men, HIV-positive heterosexual, Older HIV-positive persons, HIV-positive women, AIDS (Disease)—Patients

**Related Terms**
- Library of Congress Link
  - http://id.loc.gov/authorities/sh85011694

---

**Variants**
- HIV-positive

---

**Library of Congress**
- LOCTerm

---

**Preferential**
- Preferred

---

**Preferred**
- Preferred

---

**Preferred**
- Preferred
5.9.2 Keyword Groups

From this option within the Keywords Menu, users can access previously saved Keyword Groups to explore alternate terminology for conducting SPIN searches.

The main functions of the Keyword Groups Option Window are to allow:

- administrators to share entire groups of saved keywords with other users;
- administrators to share particular Term Labels from within groups of saved keywords;
- users to delete entire groups of their own saved keywords; and/or,
- users to delete specific Term Labels within groups of their own saved keywords.

Please Note: Any user can search using a keyword and view shared keyword groups. However, only logged-in users and administrators may save keyword groups. Sharing a keyword group is only possible for administrators.

To use the Keywords Groups Option:

- Hover your cursor over the Keywords Menu on the toolbar. The menu expands, displaying three options—Search, Keyword Groups, and Shared Keyword Groups.

- Hover your cursor over Keywords Groups.

- When it turns yellow, click.

A new window containing three tabs automatically opens. As shown in Figure 32 below, the Saved Groups Tab is automatically selected. Many of the navigation, sorting, and filtering features on this screen are similar to previously described windows and screens within SPIN.

- See Sections 5.3—Returned Results and 5.6.1—Saved Searches, for more information on how to use the screen.
The following table describes additional features of the Keyword Groups Option Window.

<table>
<thead>
<tr>
<th><strong>Group Name</strong></th>
<th><strong>The name of the keyword group that the user provided when saving their keyword search (see Section 5.9.1—Search).</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shared</strong></td>
<td><strong>Checking the checkboxes within the Shared Column will result in the keyword group being shared with other users within the institution, assuming the user clicks “Save Selections and Continue” before navigating away from the screen. The shared group will then appear within the Shared Keyword Groups Window. (see Section 5.9.3—Shared Keyword Groups).</strong></td>
</tr>
</tbody>
</table>
In this example, we are going to share a group of saved Term Labels, or keywords, with other users. Using Figure 32 as our starting point, let’s share the Biology and Music Groups with other users at our institution.

- From the **Keyword Groups Option Window**, click into the checkboxes within the Shared Column which are in the same rows as the group(s) you wish to share, as shown below.

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Shared</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poisons</td>
<td></td>
</tr>
<tr>
<td>Biology</td>
<td>✔</td>
</tr>
<tr>
<td>Music</td>
<td>✔</td>
</tr>
</tbody>
</table>

- Click **Save Selections and Continue**.

The screen refreshes and shows that the recent boxes you checked are still checked.

- Click **Save**.

The next time you log in to SPIN, these groups will show as shared. Other users will now have access to these groups of keywords.
5.9.3 Shared Keyword Groups

From this option within the Keywords Menu, users can access shared groups of keywords that other users at their institution have shared. The main function of the Shared Keyword Groups Window is to allow:

- users to access groups of keyword searches that other users have shared by copying them for their own use.

To use the Shared Keywords Groups Option:

- Hover your cursor over the Keywords Menu on the toolbar. The menu expands, displaying three options—Search, Keyword Groups, and Shared Keyword Groups.

- Hover your cursor over Shared Keyword Groups.

- When it turns yellow, click.

A new window containing three tabs automatically opens. As shown in Figure 33 below, the Shared Groups Tab is automatically selected. Many of the navigation, sorting, and filtering features on this screen are similar to previously described windows and screens within SPIN.

- See Sections 5.3—Returned Results and 5.6.1—Saved Searches, for more information on how to use the screen.
The following table describes additional features of the Shared Keyword Groups Window.

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Created</th>
<th>Modified</th>
<th>Created By</th>
<th>Copy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation</td>
<td>30-Apr-2012</td>
<td>18-Jun-2012</td>
<td>Jess Gorman</td>
<td></td>
</tr>
<tr>
<td>Frog Research</td>
<td>01-May-2012</td>
<td>18-Jun-2012</td>
<td>Jess Gorman</td>
<td></td>
</tr>
<tr>
<td>Transportation US Opportunities</td>
<td>03-May-2012</td>
<td>18-Jun-2012</td>
<td>Jess Gorman</td>
<td></td>
</tr>
<tr>
<td>New cancer group</td>
<td>04-Jun-2012</td>
<td>14-Nov-2012</td>
<td>William DeCocco</td>
<td></td>
</tr>
<tr>
<td>Hypertension</td>
<td>06-Aug-2012</td>
<td>06-Aug-2012</td>
<td>David Jetter</td>
<td></td>
</tr>
<tr>
<td>Cardiovascular</td>
<td>06-Aug-2012</td>
<td>06-Aug-2012</td>
<td>David Jetter</td>
<td></td>
</tr>
<tr>
<td>Cardiology</td>
<td>06-Aug-2012</td>
<td>14-Nov-2012</td>
<td>William DeCocco</td>
<td></td>
</tr>
<tr>
<td>Natural Gas</td>
<td>23-Aug-2012</td>
<td>23-Aug-2012</td>
<td>Kenny Nix</td>
<td></td>
</tr>
</tbody>
</table>

In this example, we are going to copy another user’s shared search into our own saved keyword groups. Using Figure 33 as our starting point, let’s copy Jess Gorman’s Frog Research Keyword Group into our own SPIN profile.

- Click within the row same row that “Frog Research” is listed, as shown below.
A popup window appears, asking you to confirm that you want to copy the group, as shown below.

![Popup window](image)

- Click **OK**.

SPIN automatically toggles you back to the Keyword Groups Option Window (see Figure 32). The group you just copied will now show as the last selection on this screen, as depicted below.

![Keyword Groups](image)

You can now utilize the Term Labels and features described in Section 5.9.1—Search for the Keyword Group Frog Research.
5.9.4 Using Keywords During Advanced Searches

As described in Section 5.2.2—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 34 shows how such a scenario would appear within the Advanced Search Screen.

Figure 34 .................................................................................................... Using Keywords as Program Criteria

As you can see in Figure 34, 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 Keywords Menu Search Option Window will open up, as depicted in Figure 30 within Section 5.9.1—Search.

From this point, the user would have to conduct a new Keywords Search, as described in Section 5.9.1, save their new Keyword Group, then return to the Advanced Search Mode to access it as one of the Program Criteria.

- See Section 5.2.2.1—Advanced Search Tool, for more information on how the Advanced Search Mode and Program Criteria work.

- See the Subsections 5.9.1 and 5.9.2 for information on how to search for and save keywords.
5.10 Administration Menu

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. 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.

Hover your cursor over the Administration Menu of the toolbar. The menu expands to display four main options: Custom Logo Upload, Default Profile, Contact Information, and SMARTS Administration. These options are described in the corresponding subsections below.
5.10.1 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:

- Hover your cursor over the Administration Menu of the toolbar.
- Move it down until the words “Custom Logo Upload” turn yellow and click.

Next to the words “Current Banner,” your institution’s previously-uploaded logo will appear. If your logo has never been uploaded, the InfoEd Global logo will be shown.

To select your institution’s logo from your local hard drive:

- Click the Browse Button next to the Change/Upload Banner area.

Your local files will appear.

- Click on the file you want, then click “Open” on your computer’s software popup window.

- Click to transmit your logo for display.

SPIN will automatically adjust the size of the logo to make it fit proportionally on SPIN pages.

- To remove your institution’s logo at any time, click .

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.
5.10.2 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:

- Hover your mouse over the Administration Menu of the toolbar.
- Move it down until the words “Default Profile” turn yellow; and click.

The Institution Default Profile Window (Figure 35) will appear.
The Institution Default Profile Window has three sections: Category Filters, Search Options, and Detail Columns. Each is described in detail in the following three subsections.
5.10.2.1 Category Filters Section

This is the first section of the **Institution Default Profile Window** (see Figure 35). Category Filters allow administrators to set the parameters listed below.

- Applicant Location
- Applicant Type (individual or organization)
- Project Type (type of funding)
- Project Location
- Citizenship Status

Figure 36 depicts the choices an administrator made for his or her Institution Default Profile. For example, it is clear that this institution is based in New York.

![Figure 36](image)

To manipulate these settings:

- Click in the top, right-hand corner of the Category Filters Section.

The SPIN **Category Filters Popup** will appear, as depicted in Figure 16 within Section 5.4.1—Navigating within the Category Filters Popup.

From here, you can manipulate the various filters. Section 5.4—Category Filters 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.
5.10.2.2 Search Options Section

The second section of the **Institution Default Profile Window** (see Figure 35) is the Search Options Section (Figure 37). 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 37**..........................**Institution Default Profile Window—Search Options Section**

To manipulate these options:

- Click on ![Edit](edit.png) in the top, right-hand corner of the section.

The SPIN Search Options Popup Window will appear. This window is depicted in Figure 21 within Section 5.5.1—Search Options. Please refer to that section for instructions on how to make selections within the window.

After making selections:

- Click ![Save and Exit](save_exit.png) to save your changes to the Institution Default Profile.

**OR**

- Click ![Exit](exit.png) to leave edit mode without saving any of your changes to the Institution Default Profile.
5.10.2.3 Detail Columns Section

This is the third section of the **Institution Default Profile Window** (see Figure 35). 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 5.5.2—Detail View Column Options).

The Detail Columns Section can also be used to set what the order the details are presented in. For example, Figure 38 shows that an administrator decided that they wanted their institution’s users to *see program objectives first* when accessing the SPIN detail view feature.

![Figure 38](image)

**Figure 38** Institution Default Profile Window—Detail Columns Section

Figure 38 also shows that an administrator has decided to limit what will be show within the program details view to just three categories: objectives, contact email, and eligibility information. The result of these choices is shown in Figure 39.

To set which criteria will appear within detail views within returned SPIN opportunities:

- From the top, right-hand corner of the Detail Columns Section, click ![Edit](image). The **Detail Columns Popup Window** will appear (see Figure 22 in Section 5.5.2—Detail View Column Options).

As an administrator, you should follow the SPIN user instructions provided in Section 5.5.2 to make your selections, and to put them in the order you prefer. However, 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**.

- After making selections, click ![Save and Exit](image) to save your changes to the Institution Default Profile.

**OR**

- Click ![Exit](image) to leave edit mode without saving any of your changes to the Institution Default Profile.
The selections made using the Edit Feature from the Administration Menu > Default Profile—Detail Columns Section would result in the view shown in Figure 39.

When any of your institution’s users click on the down arrow, only the categories that you chose while using the Detail Columns Popup Window will appear (see Figure 22 within Section 5.5.2—Detail View Column Options).
5.10.2.4 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:**

- Click **[Restore System Defaults]** in the top, right-hand corner of the window. A popup window will appear, as shown below.

  ![Restore System Defaults](image)

  **This will restore the system defined defaults for user profiles.**

  Are you sure you want to do this?

  - **[Clear Filters]**
  - **[Cancel]**

Verify whether or not you want to clear all the previous category filters you have used.

- 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.
5.10.3 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:

- Hover your cursor over the Administration Menu of the toolbar.
- Move it down until the words “Contact Information” turn yellow, and click.

The Institution Contact Information window will appear, as shown below.

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.

Click Save to set your entry as the default contact information/instructions for your institution.
When institution users click on Opportunity Information Links (see Figure 10 within Section 5.3.1.1) in returned results, the information you entered here will appear on the lower, right-hand side of the window, as shown below.

**Institution Instructions**

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

wdecocco@infoedglobal.com
5.10.4 SMAR茨 Administration

This is the fourth item under the Administration Menu. It allows administrators to generate feedback from the SMAR茨 email notifications system. The feedback shows how well the opportunity-seekers within your institution are utilizing SMAR茨. This allows you to determine whether your institution is reaping the full benefits of SMAR茨, and make adjustments, if necessary.

The SMAR茨 Administration Option is very detailed, and contains the following tabs:

- Match Overview
- Individual Reporting
- Low-Performing Searches
- Email Overview
- Email Open Details
- Email Click Through Details
- Email Errors
- Archived SMAR茨 Sheets

To access these features, hover your cursor over the Administration Menu of the toolbar, and move it down until the words “SMAR茨 Administration” turn yellow, as shown below, 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 SMAR茨 users at your institution.
5.10.4.1 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.

- Click on Match Overview to begin.

Figure 40........................................................................... SMARTS Administration—Match Overview Window
Figure 40 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 March 1st, 2013 through June 1st, 2013. (The latter part of this time period is not shown in the graph, as it would continue off the page.)

**Number of People With Configurations**

To find out how many of your institution’s SPIN users have activated SMARTS email notifications:

- 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**

Enter the start date of your timeframe.

Start Date

```
01-Mar-2013
```

- Click on the calendar icon and move your cursor over the date you want.
- When the desired date turns gold, click.

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.
Repeat the same procedure to select the end date for your query. To return a graphical depiction of your query, click on **Apply**.

**Figure 41**......................................................... SMARTS Administration—Returned Query, Number of People

![Graph showing query results over time](image)

As Figure 41 shows, at this institution on March 1st, 2013 there were three users who had active SMARTS configurations, by early April, there were five, and then the number of users went down to four.

---

**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.
Number of Total Configurations

To find out how many SMARTS configurations are active across your entire institution, click on the “Number of total configurations” bullet option.

- Number of people with configurations
- Number of total configurations
- Number of total matches

Follow the instructions outlined earlier in this section under: Choose a Timeframe for Your Results.

To return a graphical depiction of your query, click Apply.

Figure 42: SMARTS Administration—Returned Query, Number of Total Configurations

As Figure 42 shows, at this institution up until March 21st, 2013 there were 12 total SMARTS configurations, but the number increased to 225. On March 29th, the number decreased dramatically, to 13.
**Number of Total Matches**

To find out how many SMARTS configurations in your institution were matched with actual funding opportunities, click on the “Number of total matches” bullet option.

- Number of people with configurations
- Number of total configurations
- Number of total matches

Follow the instructions outlined earlier in this section under: Choose a Timeframe for Your Results.

To return a graphical depiction of your query, click [Apply].

---

**Quick Tip**

You can set the timeframe of your query on any one of the three bullet options (number of people, number of configurations, and number of total matches), and toggle between the three query results without having to re-set the timeframe. Just click the Apply button after toggling to a new bullet option.

---

**Figure 43** SMARTS Administration—Returned Query, Number of Total Matches
As Figure 43 shows, at this institution in March 2013 three SPIN users had SMARTS configurations that were matched with funding opportunities. From late March to early April the number went up to four, then up to five, then back down to four throughout most of April.

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.
5.10.4.2 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.

- Click on Individual Reporting to begin.

Figure 44: SMARTS Administration—Individual Reporting Window
Drag and Drop Group By Queries

From the Individual Reporting Window shown in Figure 44, 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:

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

As an administrator, if you were interested in reviewing when all your users were last notified of matched opportunities via SMARTS, you would:

- Click and hold on Last Matched Date.
- Drag it into the Group by: drag and drop a column header to this section area.
- 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 Last Matched Date in place of the former instruction.

- Click on the right-hand corner of Last Matched Date to exit the Group By Function and return to the initial Individual Reporting Window (see Figure 44).

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.
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 44) would now be grouped as shown below.

<table>
<thead>
<tr>
<th>Last Matched Date: 23-Jun-2013</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>David Jetter</td>
<td>9</td>
<td>23-Jun-2013</td>
</tr>
<tr>
<td>Roger Wood</td>
<td>3</td>
<td>23-Jun-2013</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Last Matched Date: 24-Jun-2013</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>William DeCocco</td>
<td>20</td>
<td>24-Jun-2013</td>
</tr>
<tr>
<td>Damian Davini</td>
<td>4</td>
<td>24-Jun-2013</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Number of SMARTS Configurations: 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Damian Davini</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of SMARTS Configurations: 8</th>
</tr>
</thead>
<tbody>
<tr>
<td>David Jetter</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of SMARTS Configurations: 20</th>
</tr>
</thead>
<tbody>
<tr>
<td>William DeCocco</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Full name</th>
<th>Number of SMARTS Configurations</th>
<th>Last Matched Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Damian Daviti</td>
<td>4</td>
<td>24-Jun-2013</td>
</tr>
<tr>
<td>David Jetter</td>
<td>0</td>
<td>23-Jun-2013</td>
</tr>
<tr>
<td>Roger Wood</td>
<td>1</td>
<td>21-Jun-2013</td>
</tr>
</tbody>
</table>

This drag and drop action would result in a list that looks like this:

- Full name: Damian Daviti
  - Damian Daviti
- Full name: David Jetter
  - David Jetter
- Full name: Roger Wood
  - Roger Wood

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 the Full name column.
Using Filters to Customize Queries

Each column in the Individual Reporting Window (see Figure 44) 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.

- Click on the right-hand side of the Full Name Column. The following box will appear:

  ![Filter Box](image)

- Click on next to the “Is equal to” field. The following pull-down menu will appear:

  ![Filter Options](image)

- Hover your cursor over your preferred option and click. The following will appear:

  ![Filter Selection](image)

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.”
Click into the empty field below “Starts with” and type the first name of the SMARTS user whose activity you are interested in assessing.

- 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.

- Enter the last name of the person you are interested in assessing.

- 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.

- Click at any time to revert back to the initial Individual Reporting screen.

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.

- See also Section 5.3.1.3—Filtering Results
Using the Details Arrow & Refresh Button

Next to each user’s name within the Full Name Column there is an feature which allows administrators to see more details about which searches their institution’s users have set up SMARTS Notifications for.

Click on next to a user’s name. The arrow will now look like this: and details will appear, as shown below.

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 5.6.1—Saved Searches. The History Column is described below.

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.
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 44). This feature allows you to look at the SMARTS Configuration histories for any institution user.

- Click on next to a user’s name. The arrow will change to and details will appear, as shown below.

<table>
<thead>
<tr>
<th>Full name</th>
<th>Number of SMARTS Configurations</th>
<th>Last Matched Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>William DeCocco</td>
<td>20</td>
<td>26-Jun-2013</td>
</tr>
</tbody>
</table>

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.

- Click on in the row of the search you want to review.

The Smarts Configuration History Window will open, as shown in Figure 45.
You can control how many histories appear on your SMARTS Configuration History Window at any given time.

- Click on the pull-down number menu in the lower, left-hand corner of the screen.
  
  ![Pull-down menu](image)

- Hover and click on the desired number when it turns yellow.

- Click on the arrows in the lower, left-hand corner of the screen to toggle between different pages of results.
  
  ![Arrows](image)
We now can see by looking at the bottom, right-hand corner of Figure 45 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.
- See also Section 5.2.4—Activating SMARTS Email Notifications.

You must enter a date range (see below) or the returned histories default to the current day, as the message box below explains.

![Message box](image)

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.

- 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”.

- Click on the arrow to the left of the month and year header to toggle backwards to the desired month.

- Hover over the desired starting date for the filter. Then click.

- 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: Displaying items 1 - 10 of 131. The first few are shown below:

<table>
<thead>
<tr>
<th>SPIN ID</th>
<th>Opportunity Title</th>
<th>Sponsoring Name</th>
<th>Next Deadline Date</th>
<th>Last Revised</th>
<th>Date Matched</th>
<th>Bookmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>00710</td>
<td>Ruth L. Kirschstein National Research Service Awards (NRSA) for Individual Predoctoral Fellows in PharmDPhD Programs (F31)</td>
<td>National Institute of General Medical Sciences/NH/NIH</td>
<td>03-Aug-2013</td>
<td>30-May-2013</td>
<td>31-May-2013</td>
<td>+</td>
</tr>
<tr>
<td>01900</td>
<td>Prostate Cancer Research Program-Translative Impact Award</td>
<td>Department of the Army</td>
<td>14-May-2013</td>
<td>16-May-2013</td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>01937</td>
<td>Distinguished Scientist Award</td>
<td>Americas College of Cardiology</td>
<td>30-Sep-2013</td>
<td>25-May-2013</td>
<td>24-May-2013</td>
<td>+</td>
</tr>
</tbody>
</table>
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).
Hiding Duplicate SPIN IDs

Sometimes duplicate SPIN ID Numbers appear within the SMARTS Configuration History Window (Figure 45). 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.

✓ In this example, the number of returned histories decreased from 131 to 129. No data was “lost” from the returned histories.

The Bookmark Column

The SMARTS Configuration History Window contains a Bookmark Feature in the upper, right-hand corner.

- See Section 5.3.2—Bookmarking Opportunities

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.

Using Column Filters

- See the Using Filters to Customize Queries section above.
- See Section 5.3.1.3—Filtering Results
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.

![Confirmation Box](image)

Click **Save and Continue** to save your search parameters.

- See Section 5.2.3—Saving Search Parameters, for more information.

**OR**

- Click **Continue** to exit your returned histories page without saving parameters.

**OR**

- Click **Cancel** or click on **X** to stay on the current page.
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.

- Click on the right-hand side of the Number of SMARTS Configurations Column. The following box will appear:

![Clear Filter]

Show rows with value that
- Is equal to

And
- Is equal to

- Click on next to the “Is equal to” Field. The following pull-down menu will appear:

![Pull-down menu]

- Clear Filter
- Show rows with value that
  - Is equal to
  - Is greater than or equal to
  - Is greater than
  - Is less than or equal to
  - Is less than
  - Is not equal to

- Filter
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.

- Hover your cursor over your preferred option, then click.

  ![Filter Options](image)

  In this example, we chose “Is greater than or equal to,” and the resulting box appeared:

  ![Selected Option](image)

- 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.

  ![Input Field](image)

  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.

- Click ![Filter Button](image) to return results.

  In this example they would appear as shown below.

  ![Filtered Results](image)
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.
  
  ▪ Hover your cursor over "Is less than or equal to," and click.

  ![Dropdown menu](https://via.placeholder.com/150)

  ![Menu options](https://via.placeholder.com/150)

  ▪ Click into the empty field below your selection and type a number that corresponds to the parameters you are seeking information about.

  ![Input field](https://via.placeholder.com/150)

- 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.

  ![Filter button](https://via.placeholder.com/150)

- Click to return results.
The following results are returned showing only those SPIN SMARTS users who have between three and 15 configurations set up:

<table>
<thead>
<tr>
<th>Full name</th>
<th>Number of SMARTS Configurations</th>
<th>Last Matched Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>David Jetter</td>
<td>9</td>
<td>25-Jun-2013</td>
</tr>
<tr>
<td>Damien Davinl</td>
<td>4</td>
<td>25-Jul-2013</td>
</tr>
<tr>
<td>Roger Hood</td>
<td>3</td>
<td>25-Jul-2013</td>
</tr>
</tbody>
</table>

- Click at any time to revert back to the initial Individual Reporting Window (Figure 44).

**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.

- Click on the right-hand side of the Last Matched Date Column. The following box will appear:

![Filter Box](image)

- Click on next to the “Is equal to” Field. The following pull-down menu will appear:

![Pull-Down Menu](image)
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.

- Hover your cursor over your preferred option, then click.

In this example, we chose “Is before,” and the resulting box appeared:

- 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. 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 30\textsuperscript{th}, 2013—this would be manually typed as 30-Jun-2013.

- Click to return results, as shown below.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Number of SMARTS Configurations</th>
<th>Last Matched Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roger Wood</td>
<td>1</td>
<td>21-Jan-2013</td>
</tr>
<tr>
<td>David Letter</td>
<td>9</td>
<td>25-Jan-2013</td>
</tr>
<tr>
<td>William DiCicco</td>
<td>20</td>
<td>25-Jun-2013</td>
</tr>
<tr>
<td>Dariaan Dini</td>
<td>4</td>
<td>25-Jun-2013</td>
</tr>
<tr>
<td>Roger Wood</td>
<td>2</td>
<td>25-Jun-2013</td>
</tr>
</tbody>
</table>

- In this example, the screen did not change from the initial Individual Reporting Window (Figure 44) because all of the last matched dates fell before June 30\textsuperscript{th}, 2013.

Now let’s enter another parameter to further limit your returns.

- In this example, we only want last matched dates before June 30\textsuperscript{th}, but after June 24\textsuperscript{th}, 2013.

- Click on next to the “Is equal to” field. The following pull-down menu will appear:

  And
  - Is equal to
  - Is equal to
  - Is after or equal to
  - Is after
  - Is before or equal to
  - Is before
  - Is not equal to

- Click on “Is after” to choose this parameter.

- Follow the instructions provided above to enter June 24\textsuperscript{th}, 2013.

- Click to return results.
The following results are returned showing matches that occurred between June 24th and June 30th, 2013.

<table>
<thead>
<tr>
<th>Full name</th>
<th>Number of SMARTS Configurations</th>
<th>Last Matched Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>David Jettler</td>
<td>9</td>
<td>25-Jun-2013</td>
</tr>
<tr>
<td>William DeCocco</td>
<td>20</td>
<td>25-Jun-2013</td>
</tr>
<tr>
<td>Damian Dinni</td>
<td>4</td>
<td>26-Jun-2013</td>
</tr>
<tr>
<td>Roger Wood</td>
<td>3</td>
<td>25-Jun-2013</td>
</tr>
</tbody>
</table>

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.

- Click at any time to revert back to the initial Individual Reporting Window.
5.10.4.3 Low Performing Searches

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.

Click on **Low Performing Searches** to begin.

The resulting screen is depicted in Figure 46 below. SPIN defaults to five total results in the last seven days; results from those parameters appear automatically when administrators first access the screen.

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.

- Click on the up or down arrows in the area shown below until the number you want appears.

Limit to configurations returning fewer than 5 total results
Next we will enter the timeframe for the assessment.

- Click on the up or down arrows in the area shown below until the number you want appears.

  in the last \(2\) 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.

- Click \(\text{Apply}\) to obtain your results.

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 Low Performing Searches Window (Figure 46) at any given time.

- Click on the pull-down number menu in the lower, left-hand corner of the screen.

- Hover and click on the desired number when it turns yellow.

- 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.

Drag and Drop Group By Queries

The **Low-Performing Searches 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 5.10.4.2—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.

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.

- 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 5.4—Category Filters Menu
- See Section 5.5—Options Menu

The Refresh Button

The Low Performing Searches Window (Figure 46) 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.
5.10.4.4 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.

- Click on Email Overview to begin.

The resulting screen is depicted in Figure 47 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 47 — SMARTS Administration—Email Overview Window
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:

- Click on the “Number of emails opened” bullet option.

- See the section of the same name within Section 5.10.4.1—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.

- Click to return a graphical depiction of your query.

The results show that among this institution’s five users (see Section 5.10.4.2—Individual Reporting), from April 1st to June 1st, 2013, the maximum number of SPIN SMARTS users who opened their email notifications was three.
Number of Click-Throughs

To find out how many of your institution’s users clicked on linked features in their SMARTS Notifications Emails:

- 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 5.10.4.1—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.

- Click to return a graphical depiction of your query.

The results show that among this institution’s five users (see Section 5.10.4.2—Individual Reporting), from April 1st to June 1st, 2013, one user clicked on links that were included in the SMARTS Email Notifications.
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.

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.
5.10.4.5 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.”

- Click on Email Open Details to begin.

The resulting screen is depicted in Figure 48 below.

**Figure 48**SMARTS Administration—Email Open Details Window

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Number of Opens</th>
<th>Opened Date</th>
<th>Name of configuration last opened</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roger Wood</td>
<td>7</td>
<td>02-Jun-2013</td>
<td>US Federal</td>
</tr>
<tr>
<td>Daniel Jetter</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Keith Willis</td>
<td>1</td>
<td>03-Apr-2013</td>
<td>SMARTS</td>
</tr>
<tr>
<td>Damien Davies</td>
<td>21</td>
<td>14-Jun-2013</td>
<td>Australia</td>
</tr>
<tr>
<td>Roger Wood</td>
<td>2</td>
<td>27-Jun-2013</td>
<td>STEM Search</td>
</tr>
<tr>
<td>William DeCecco</td>
<td>2</td>
<td>26-Jun-2013</td>
<td>All Sciences Except Earth</td>
</tr>
</tbody>
</table>

**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 5.10.4.2—Individual Reporting
- See also Section 5.3.1.3—Sorting Results

**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 5.10.4.2—Individual Reporting
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 5.10.4.2—Individual Reporting
- See also Section 5.3.1.3—Filtering Results
5.10.4.6 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.

- Click on **Email Click Through Details** to begin.

The resulting screen is depicted in Figure 49 below.

**Figure 49....................................................... SMARTS Administration—Email Click-Through Details Window**

<table>
<thead>
<tr>
<th>Full name</th>
<th>Number of SMARTS click-throughs</th>
<th>Date of last click-through</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roger Wood</td>
<td>1</td>
<td>01-Apr-2013</td>
</tr>
<tr>
<td>David Mutter</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Keith Willis</td>
<td>3</td>
<td>27-Mar-2013</td>
</tr>
<tr>
<td>Damian Davies</td>
<td>2</td>
<td>27-Mar-2013</td>
</tr>
<tr>
<td>Roger Wood</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>William Decocco</td>
<td>2</td>
<td>22-Apr-2013</td>
</tr>
</tbody>
</table>

As shown in Figure 49, 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.
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.

- Click on next to a user’s name. The arrow will change to and details will appear, as shown below.

<table>
<thead>
<tr>
<th>Full name</th>
<th>Number of SMARTS click-throughs</th>
<th>Date of last click-through</th>
</tr>
</thead>
<tbody>
<tr>
<td>William DeCicco</td>
<td>2</td>
<td>22-Apr-2013</td>
</tr>
</tbody>
</table>

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.

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.

- Click on again to hide the details.

Drag and Drop Group By Queries

Administrators can group their query results by user name.

- See the section of the same name within Section 5.10.4.2—Individual Reporting
- See also Section 5.3.1.3—Filtering Results
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 5.10.4.2—Individual Reporting

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 5.10.4.2—Individual Reporting
❖ See also Section 5.3.1.3—Filtering Results
5.10.4.7 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;
- group and filter the information by name and email address.

Click on Email Errors to begin.

The resulting screen is depicted in Figure 50 below.

As shown in Figure 50, 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.

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 5.10.4.2—Individual Reporting
- See also Section 5.3.1.3—Filtering Results
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 5.10.4.2—Individual Reporting

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 5.10.4.2—Individual Reporting
❖ See also Section 5.3.1.3—Filtering Results
5.10.4.8 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.

Click on Archived SMARTS Sheets to begin.

The resulting screen is partially depicted in Figure 51 below.

![Figure 51: SMARTS Administration—Archived SMARTS Sheets Window]

As shown in Figure 51, 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.

- Hover over your desired date within the left-hand column of the screen.
- When the date you want appears with an underline, click.

31-May-2013
01-Jun-2013
02-Jun-2013
03-Jun-2013
04-Jun-2013
05-Jun-2013
06-Jun-2013
07-Jun-2013
08-Jun-2013
09-Jun-2013
10-Jun-2013
11-Jun-2013
12-Jun-2013
13-Jun-2013
14-Jun-2013

✓ In this example, we are going to access returns for June 3rd, 2013.
The following screen results:

- In this example, William DeCocco, and Roger Wood received no SMARTS Email Notifications on June 3rd, 2013.

- In this example, Damian Davini received several notifications on June 3rd, the first one being SPIN ID 96448, Fulbright Programs.

  - Use the blue scroll bars on the right-hand side of the window to navigate up and down to see all the results.

As shown above, the SMARTS Sheet shows:

- the SPIN ID number;
- the opportunity title;
- the Sponsor’s name; and,
- the 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.
```

### Opting Out of SMARTS Sheets by Email

As an administrator, you automatically receive SMARTS Sheets by email. When you first click on the **Archived SMARTS Sheets Tab**, you will see the following:

- **Check** the box to begin.

The green box is already checked because the system defaults to sending you SMARTS Sheets. You can change the settings if you would rather not receive the sheets by email.

- Click on the box with the green checkmark (see above). The checkmark will disappear, as shown below.

- Click to save your changes.

You can still access SMARTS Sheets at any time by logging in as an administrator and going to **Administration > SMARTS Administration**, selecting the **Archived SMARTS Sheets Tab**, and following the instructions outlined above.