



infoEd

SPINPlus

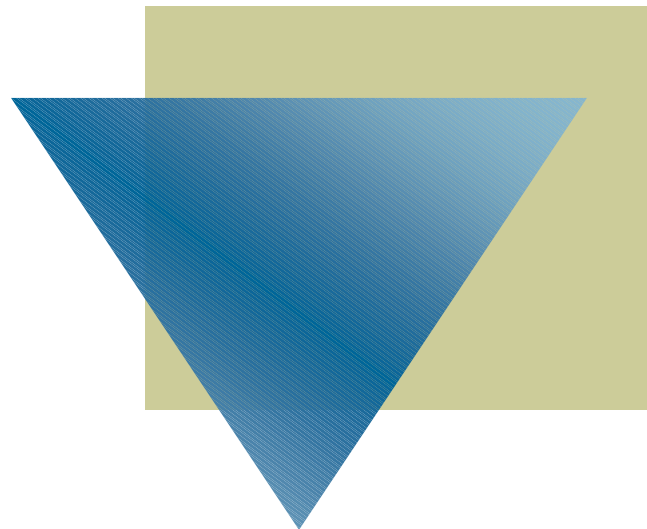
Getting Started Guide

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What is SPINPlus?

SPINPlus is a web-based system that includes a database of funding opportunities, a database of investigator profiles, and a matching alert service. **SPINPlus** includes three product modules: **SPIN**, **SMARTS**, and **GENIUS**.

SPIN is a funding opportunities database designed to provide up-to-date information on current national and international government and private funding sources. All of the data in **SPIN** is obtained directly from the sponsoring agencies to ensure the integrity of the information.

GENIUS is a global WWW network and database of scientific and scholarly expertise. The system contains profiles entered and maintained by scholars and researchers at leading universities and research institutions throughout the world. **GENIUS** serves as a registry of institutional talent and expertise to be used by industry and academia and provides a searchable resource for identifying interest and expertise for industry/university partnering, global partnering, and sponsored funding matches.

SMARTS is an electronic matching and funding opportunity notification system which provides investigators with a direct and targeted electronic link to comprehensive, current, and available national and international research funding information. The investigator profile information is collected via forms in **GENIUS** and used for matching with the **SPIN** database. Matching is conducted on a daily basis and programs are automatically emailed to individual researchers.

Customer Support

InfoEd's Training and Technical Support specialists are available to help you use **SPINPlus**. If you are having difficulty using the software, or if you encounter an error message, please contact us using one of the following methods:

Customer Service Hotline 800-727-6427

Customer Service via fax 518-464-0695

E-mail office@infoed.org

WWW <http://www.infoed.org>

Support is available from 8:00 A.M. to 5:00 P.M. Eastern Standard Time, Monday through Friday. You may also contact your institution's Module Administrator with questions.

Accessing SPIN

If you are an intranet client, you may access **SPIN** via your institution's server. Internet clients may access the **SPIN** module from InfoEd's website. Intranet clients should contact their Module Administrator for the link to **SPIN**.

➤ **To access SPIN:**

1. From your browser (Internet Explorer or Netscape version 4.0 or greater), go to InfoEd's homepage <http://www.infoed.org>.
2. Click **Access Info.Office**.



3. Click **Info.Search**.



Accessing SPIN

4. Click **SPIN**.



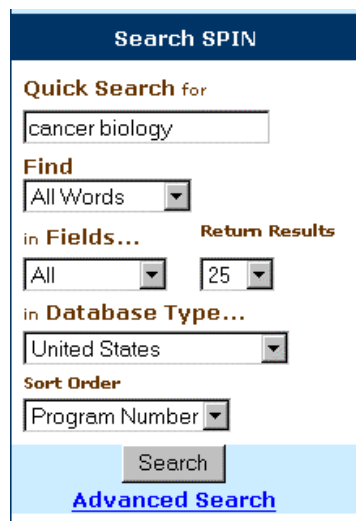
Your username and password are case sensitive.

5. Most institutions use IP addresses to access **SPIN** and do not need a username and password. If your institution is set up with username and password access to the **SPIN** module, enter your username and password and click **Login to SPIN Search**.
6. The **SPIN** Search main page will appear.



SPIN Quick Search

The Quick Search function allows you to search the text of **SPIN** programs for a particular word or phrase.



Find Drop-Down Menu Options

All Words: Search results will contain all programs with the words “cancer” **AND** “biology” in the text of the **SPIN** program.

Any Words: Search results will include any **SPIN** program that contains the word “cancer” **OR** “biology” in the text.

Exact Phrase: Search results will include all **SPIN** programs that contain the exact phrase, “cancer biology” in text of the **SPIN** program.

➤ To perform a Quick Search:

1. Type the word(s) you want to search for in the *Quick Search for* free text box. **Example: cancer biology.**
2. From the *Find* drop-down menu, select to search **All Words**, **Any Words**, or **Exact Phrase**.
3. From the *in Fields...* drop-down menu, select the field(s) from which the Quick Search will look for your words (**All**, **Title**, **Objectives**, or **Synopsis**.)
4. From the *Return Results* drop-down menu, select the number of results you would like to view per page.
5. From the *in Database Type...* drop-down menu, specify the country database to search. Each country's database includes programs that are country-specific, and programs that do not have citizenship or geographical restrictions.

6. From the *Sort Order* drop-down menu, choose the order in which to sort your search results.
7. Click **Search** to run the Quick Search. The **SPIN Search Results** page will appear. You can choose to do the following:
 - Narrow your Quick Search results by performing another search within the previous search's results
 - Perform a new search

Search Within Existing Results/Perform a New Search

At the bottom of the **SPIN Search Results** page, you can further refine your Quick Search results or perform a new search.

The screenshot shows the search interface with the following elements:

- Navigation links: [Advanced Search Page](#), [Quick Search Page](#), and [Next 25 Results >>](#)
- Search input: A text box containing "breast cancer".
- Sort dropdown: A menu with options: All, Title, Objectives, Synopsis.
- Search button: "Search SPIN"
- Search options: Radio buttons for "Search Within Existing Results" (selected) and "New Search".
- Report options: A "Report" button.
- Footer: "Report Options" and "Destination Options" labels.

➤ Search Within Existing Results:

1. Scroll down to the bottom of the **SPIN Search Results** page to narrow your current search results.
2. Type the word(s) into the text box.
3. Choose to search the **Title, Objectives, Synopsis, or All** three fields for the word(s) or phrase entered.
4. Select the *Search Within Existing Results* option button.
5. Click **Search SPIN**. The **SPIN Search Results** page will appear with new results.

➤ Perform a New Search:

1. Scroll down to the bottom of the **SPIN Search Results** page and type the word(s) or phrase you would like to search in the text box.
2. Choose to search the **Title, Objectives, Synopsis, or All** three fields for the word(s) or phrase entered.
3. Select the *New Search* option button.
5. Click **Search SPIN**. The **SPIN Search Results** page will appear with new results.

SPIN Advanced Search

Advanced Search integrates the functionality of Quick Search with Boolean logic and the ability to search all fields. (Note: See the *SPINPlus Reference Manual* for field descriptions.) To locate funding opportunities in Advanced Search:

1. Click **Advanced Search** at the bottom of the Quick Search screen. The Advanced Search page will appear.

The screenshot shows the 'Welcome to SPIN Search' page. At the top, there are navigation links: 'View Criteria/Delete Items', 'Clear Search', 'Run Search', 'Load Search', and 'Save Search'. Below this is a 'Database Type' dropdown menu set to 'United States'. The main search area is organized into several sections with blue hyperlinks for categories: 'Keywords or Use Boolean AND Logic', 'Applicant Types', 'Award Types', 'Citizenship', 'Geographic Restrictions', 'Locations Tenable', 'Title Contains', 'Objectives Contain', and 'Synopsis Contains'. Each category has a corresponding drop-down menu. Below these is the 'Sponsor Information' section with free text fields for 'Sponsor', 'Sponsor Type', 'Contact', and 'Address'. Further down are fields for 'City', 'State', 'Zip', 'Tel', 'Fax', 'Email', and 'Website'. The 'Target Groups' section has a dropdown menu. Below that are date fields for 'Establish Date', 'Review Date', and 'Follow Up Date', each with a dropdown menu. The 'Program Numbers' section includes 'Deadline(s)', 'Deadline Indicator', and 'Deadline Open'. The 'Cost Sharing' section has fields for 'Cost Sharing Cap (%)', 'Indirect Costs', and 'Indirect Cost Cap (%)'. The 'CFDA Number' section has a dropdown menu. At the bottom, there are buttons for 'Delete Items', 'Run Search', 'Clear Search', 'Load Search', 'Save Search', and 'Edit Profile'. At the very bottom, there are 'Primary Sort' and 'Secondary Sort' dropdown menus, and a 'Return Results' dropdown menu set to '25'.

2. To define your search, click hyperlinked category names in blue to make value selections; click drop-down menus to select a value(s); and/or type a word(s) into the free text fields. The categories you select will vary depending on the type of search you would like to run.
3. From the **Primary** and **Secondary Sort** drop-down menus, choose the order in which to sort your search results.
4. From the **Return Results** drop-down menu, select the number of results you would like to view per page.
5. Click **Run Search** to run the Advanced Search.



- The number of categories you use will impact your search results. Filling in too many fields will restrict your results.

- If search criteria are set in multiple categories within a search, a criterion from each category must be satisfied to produce a result (hit) from the **SPIN** database.

In Advanced Search mode, you have the ability to save and reuse your searches. Click **Save Search** to save your search criteria. Click **Load Search** to re-run your saved search. (See the *SPINPlus Reference Manual* for details on saving and loading **SPIN** searches.)

Email a **SPIN** program to a colleague by clicking the **Email Program to a Colleague** link at the top of the **SPIN** program. (See the *SPINPlus Reference Manual* for details.)

Keywords

The most common category to utilize in Advanced Search is the **Keywords** category. Keywords are words/terms that are used to describe the research areas or academic disciplines funded by a particular funding opportunity.

Keywords are broken into 12 major divisions. You can select keywords in four different ways:

- Choose an entire division of keywords by major topic for a very broad search.
- Choose specific keywords within a major topic area.
- Choose specific keywords from an alphabetical listing.
- Search for particular keywords via the **Search for a Particular Keyword** box.



To select multiple keywords in the list, hold down the Control Key (or Command Key on a Mac) while clicking the mouse.



Keywords that appear in all caps on the list indicate general keywords. Selecting these keywords will increase the number of general programs returned.

Entire Division of Keywords

Alphabetical Listing

Specific Keywords Within a Major Topic Area

Search for a Particular Keyword box

Keywords related to the subject of the program are provided at the bottom of the **SPIN** program and link to other programs associated with that particular keyword. By clicking on a specific keyword, **SPIN** runs a search to find other programs containing that keyword.

| Keywords |
|---------------------------------------|
| Drug Delivery Systems |
| Drug Design |
| Cancer/Carcinogenesis |
| Gene Therapy |

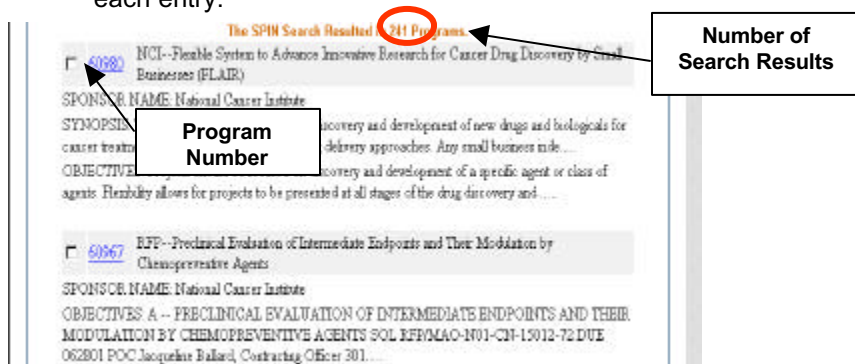
SPIN Reporting

1. After selecting search criteria, click **Run Search** at the bottom of the search page.



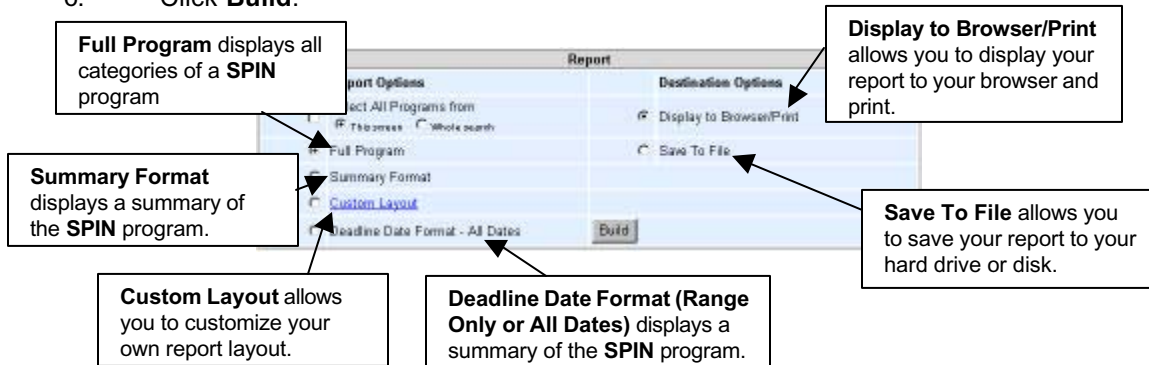
Primary Sort Secondary Sort Return Results

2. The **SPIN Search Results** page will appear. You can scroll through a partial synopsis and/or objectives of each **SPIN** program that matched your search criteria.
3. To view an individual **SPIN** program in its entirety, click the hyperlinked program number in the front of each entry.



4. Select the programs you would like to include in a **SPIN** report by selecting the check box next to the appropriate **SPIN** program numbers.
5. Select a report format and output destination.
6. Click **Build**.

When building a report of 200 programs or more, use the **Save To File** destination option.



Accessing SMARTS/GENIUS

If you are an intranet client, you may access **SMARTS/GENIUS** via your institution's server. Internet clients may access the **SMARTS/GENIUS** modules from InfoEd's website. Intranet clients should contact their Module Administrator for the link to **SMARTS/GENIUS**.

➤ **To access SMARTS/GENIUS:**

1. From your browser (Internet Explorer or Netscape version 4.0 or greater), go to InfoEd's homepage (<http://www.infoed.org>).
2. Click **Access Info.Office**.
3. Click **Info.Search**.



4. Click **SMARTS/GENIUS**. The **SMARTS/GENIUS** main page will appear.



Creating a GENIUS Profile

➤ To create a GENIUS profile:

1. Click **Create a New Profile** from the **SMARTS/GENIUS** main page.



2. Highlight your institution and click **Select**. The New Profile Registration page will appear.

A screenshot of the 'New Profile Registration' page. The page title is 'New Profile Registration'. It shows a form with the following fields: 'Your Institution: University of Eastern New York', 'Enter your first and last name and e-mail address:' with sub-fields for 'First Name' and 'Last Name', and 'E-Mail'. Below that is 'Select Your Department' with a dropdown menu showing a list of departments including 'History', 'Immunology', 'Institutional Animal Care and Use Committee', 'Institutional Review Board', 'Mathematics', 'Mechanical Engineering', 'Medicine', 'Microbiology', 'Music', and 'Neurosurgery'. At the bottom, there are fields for 'Enter your username:' and 'Enter your password:'. There are also instructions about the username and password requirements.

3. Enter your first and last name, email address, department affiliation, and a username and password (which will be used to update your profile.)
4. Click **Submit**. The Profile Summary Page will appear. This page is divided into categories which are used for **SMARTS** matching and/or storing curriculum vitae information in **GENIUS**.
5. Add information into the categories that meet your needs.



To move from one field to the next, use the TAB key on your keyboard or the mouse to move the cursor to the next text box.



Your username and password are case sensitive.

Creating a GENIUS Profile

Profile Summary Page

This profile summary page displays each of the major profile information categories that can be maintained. You may review your entire profile by going to the [Full Profile View](#).

Murphy, Amanda Account Status: Unvalidated Profile
University of Eastern New York

| Required for GENIUS & SMARTS | |
|---|--|
| General | Keywords |
| Used in SMARTS matching | |
| Applicant Types | Award Types |
| Geographical Restrictions | Sponsor Types |
| Locations Tenable | Position |
| GENIUS Categories | |
| Addresses | Collaborators |
| Committee Memberships | Courses Taught |
| Creative Activities | Education |
| Employment | Honors & Awards |
| Languages | Patents |
| Professional Associations and Societies | Professional Licenses/Certificates |
| Publications | Research |
| Reviewed Works | Sponsored Funding |

Categories Required for GENIUS and SMARTS (points to General and Keywords)

Categories Used in SMARTS Matching (points to Applicant Types, Award Types, Geographical Restrictions, Sponsor Types, Locations Tenable, Position)

Categories Used in GENIUS (points to Addresses, Collaborators, Committee Memberships, Courses Taught, Creative Activities, Education, Employment, Honors & Awards, Languages, Patents, Professional Associations and Societies, Professional Licenses/Certificates, Publications, Research, Reviewed Works, Sponsored Funding)

Once you create a **GENIUS** profile, you have control over your profile information and can access your profile at anytime to make changes.

Setting Up SMARTS Matching

GENIUS enables you to store search criteria and match your search against the **SPIN** database on a daily basis to receive relevant funding opportunities via **SMARTS**. To participate in **SMARTS**:

1. Click **General** from the Profile Summary Page, fill out your contact information, and answer the questions below.

Question 1 → When your profile information turns up as a "hit" in GENIUS searches, should prospective partners/collaborators contact you directly, or make initial contact with your institutional administrators?
 Direct Contact
 Administrator Contact

Question 2 → SMARTS output "hits" will be e-mailed to you as SPIN matches are found on a daily basis. Select "Yes" to receive your hits ("No" will discontinue this e-mail service).
 Yes
 No

Question 3 → If you answered "Yes" above to receive SMARTS output, do you want to receive all of your daily "hits" in
 a single e-mail message; or would you like
 one "hit" per e-mail?

Question 4 → If you answered "Yes" above to receive SMARTS output, do you want to receive "hits" only from sponsors within the U.S.?
 Yes
 No

Question 5 → In what format would you like your SMARTS output?(See [Help](#) for details.)
 Full Program
 Summary

2. Click **Keywords** from the Profile Summary Page to select keywords that *most closely* reflect your research interests.
3. Choose categories under **Used in SMARTS Matching** to tailor search criteria for more targeted **SMARTS** matches.

SMARTS output may be received in two formats: **Full Program** or **Summary Format**. Summary Format contains a link to the full description of the **SPIN** program. Full Program format displays the **SPIN** program in its entirety.

```
Sponsor: Cummings (Frances L. & Edwin L.) Memorial Fund
Program Number: 03893
Title: Cummings Memorial Fund Grants Program
E-mail:

SYNOPSIS:
The sponsor provides support to assist tax-exempt community
organizations that benefit the health and well-being of mankind.
Support is provided for tax-exempt organizations in the New York City
area to pilot or expand new, innovative programs in social welfare,
particularly for youth; education for minorities, disadvantaged, and
disabled; health care for disadvantaged populations; and medical
research with an emphasis on AIDS and cancer. Grants are generally
approved for one year.

Deadline(s): 10/01/2001
              04/01/2002

Link to full program description: http://www.infoed.org/new spin/spin\_prog.asp?03893
```

Link to full SPIN program

Question 1 allows you to specify whether you would like prospective partners/collaborators, who find you in **GENIUS**, to contact you directly.

Question 2 allows you to specify whether you would like to receive **SMARTS** matches.

Question 3 allows you to specify how you would like to receive your **SMARTS** matches (in a single e-mail or one "hit" per e-mail).

Question 4 allows you to specify whether you only want to receive **SMARTS** output of programs from U.S. sponsors only.

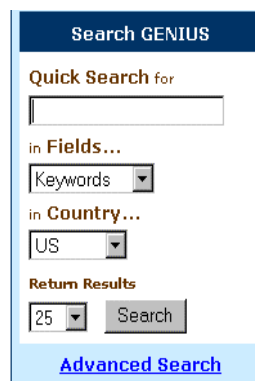
Question 5 allows you to specify the format in which you would like to receive your **SMARTS** output (Full Program or Summary Format.)

GENIUS Search

GENIUS Search has two search modes: **Quick Search** and **Advanced Search**.

Quick Search

To find information quickly, you can perform a Quick Search from the **SMARTS/GENIUS** Search main page.

The image shows a screenshot of the 'Search GENIUS' interface. At the top is a dark blue header with the text 'Search GENIUS'. Below this is a section titled 'Quick Search for' with a text input field. Underneath is a label 'in Fields...' followed by a dropdown menu currently set to 'Keywords'. Below that is a label 'in Country...' followed by a dropdown menu currently set to 'US'. At the bottom of this section is a label 'Return Results' followed by a dropdown menu set to '25' and a 'Search' button. Below the 'Search' button is a blue button labeled 'Advanced Search'.

1. Type the word(s) you want to search for in the *Quick Search* for free text box.
2. From the *in Fields...* drop-down menu, select to search **Keywords, Research, Patents, or Publications**.
3. From the *in Country...* drop-down menu, select the country from which you would like to search for investigators/researchers (**US, Canada, UK, Australia, or All.**)
4. From the *Return Results* drop-down menu, select the number of results you would like to view per page. You can select batches of 25, 50, 75, or 100.
5. Click **Search** to run the Quick Search. The **GENIUS** Search Results page will appear where you can view your search results.

Advanced Search

There are six categories available to conduct an Advanced Search. By entering data into a category, the system will search for a match to your query within **GENIUS** profiles. (Note: See the *SPINPlus Reference Manual* for field descriptions.)

To locate potential collaborators for research within **GENIUS**:

1. Click **Advanced Search** at the bottom of the Quick Search screen. The Advanced Search page will appear.



- The number of categories you use will impact your search results. Filling in too many fields will restrict your results.

- If search criteria are set in multiple categories within a search, a criterion from each category must be satisfied to produce a result (hit) from the **GENIUS** database.

A screenshot of the 'Welcome to Advanced GENIUS Search' page. The page is divided into two main columns: 'Full Profile Search' and 'Research Interests'. Under 'Full Profile Search', there are two rows of search criteria. The first row has a text input field labeled 'Using Keywords' and a dropdown menu with 'Any' selected. The second row has a text input field labeled 'In States' and a dropdown menu with 'Any' selected. Under 'Research Interests', there are two rows of search criteria. The first row has a text input field labeled 'From Institutions' and a dropdown menu with 'Any' selected. The second row has a text input field labeled 'In Country/Region' and a dropdown menu with 'Any' selected. Below the search fields, there is a 'Return Results per Page' dropdown set to '25', and three buttons: 'Clear Search', 'Run Search', and 'Delete Items'. At the bottom, there are links for 'Return to Quick Search Page', 'Home', and 'Help'. Two callout boxes are present: one on the left labeled 'Free Text Field' with an arrow pointing to the 'Using Keywords' input field, and one on the right labeled 'Hyperlink Category' with an arrow pointing to the 'From Institutions' dropdown menu.

2. To define your search, click hyperlinked category names in blue to make value selections; and/or type a word(s) into the free text fields. The categories you select will vary depending on the type of search you would like to run.
3. Click **Run Search** to run the Advanced Search.

GENIUS Reporting

1. After selecting search criteria, click **Run Search** at the bottom of the search page.



2. The **GENIUS Search Results** page will appear. You can scroll through an alphabetical listing of investigators' names whose **GENIUS** profiles matched your search criteria.
3. To view an individual profile in its entirety, click the investigator's full name (underlined in blue.)

| <input type="checkbox"/> Select All Profiles | |
|---|---------------------------------|
| <input type="checkbox"/> <u>Tracy Lape</u> | University of Eastern New York |
| <input type="checkbox"/> <u>Dana Hill</u> | Dreyfus Institute |
| <input type="checkbox"/> <u>Laurie Far</u> | University at Albany |
| <input type="checkbox"/> <u>Thomas McGeary</u> | University of Virginia |
| <input type="checkbox"/> <u>Beatrice Jones</u> | State College |
| <input type="checkbox"/> <u>Randall Song</u> | Eye and Ear Institute |
| <input type="checkbox"/> <u>Ashley Johnston</u> | Dental College of West Virginia |
| <input type="checkbox"/> <u>Geoffrey Lincoln</u> | University of Alaska |
| <input type="checkbox"/> <u>Mark CarPELLI</u> | University of Eastern New York |



When building a report of 200 profiles or more, use the **Save To File** destination option.

4. Select the profiles you would like to include in a **GENIUS** report by selecting the check box next to the appropriate investigator names.
5. Select the option buttons next to the appropriate report format and output destination.
6. Click **Build**.



Save To File allows you to save your report to your hard drive or disk.

Full Profile displays all of the categories provided in the **GENIUS** profile.

Custom Layout enables you to customize your own report layout.

Display to Browser/Print allows you to display your report to your browser and print.