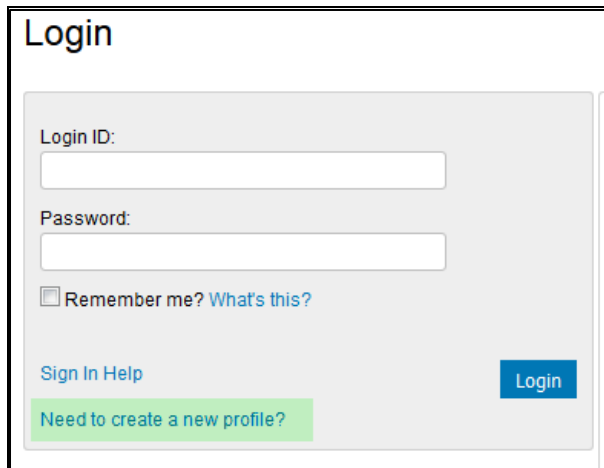


## Create new profile

Navigate to <https://spin.infoedglobal.com>

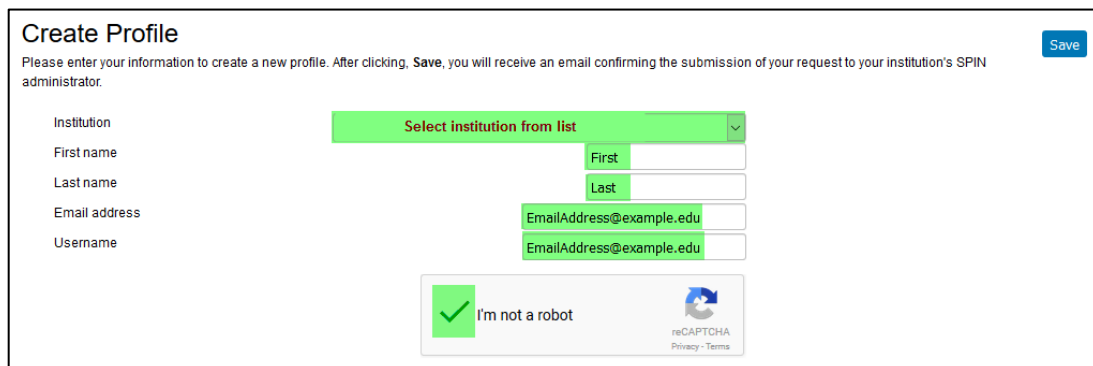
1. Click "Need to create a new profile?"  
(If connection is detected as being from an on-campus location, you may need to click "Sign In" on the preceding page)



The screenshot shows a "Login" form with the following elements:

- Header: "Login"
- Form fields: "Login ID:" and "Password:"
- Checkbox: "Remember me? What's this?"
- Buttons: "Sign In Help" (text link), "Login" (blue button), and "Need to create a new profile?" (green button).

2. Complete the highlighted fields  
Click Save



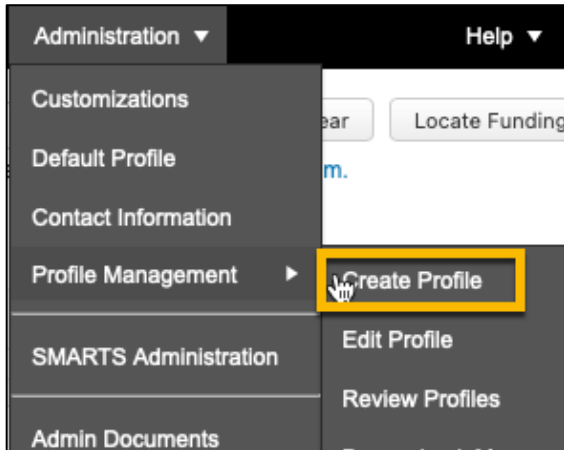
The screenshot shows a "Create Profile" form with the following elements:

- Header: "Create Profile" and a "Save" button.
- Text: "Please enter your information to create a new profile. After clicking, Save, you will receive an email confirming the submission of your request to your institution's SPIN administrator."
- Form fields: "Institution" (dropdown menu with "Select institution from list" highlighted in green), "First name" (text input with "First" highlighted in green), "Last name" (text input with "Last" highlighted in green), "Email address" (text input with "EmailAddress@example.edu" highlighted in green), and "Username" (text input with "EmailAddress@example.edu" highlighted in green).
- reCAPTCHA: "I'm not a robot" checkbox (checked) and reCAPTCHA logo with "Privacy - Terms" link.

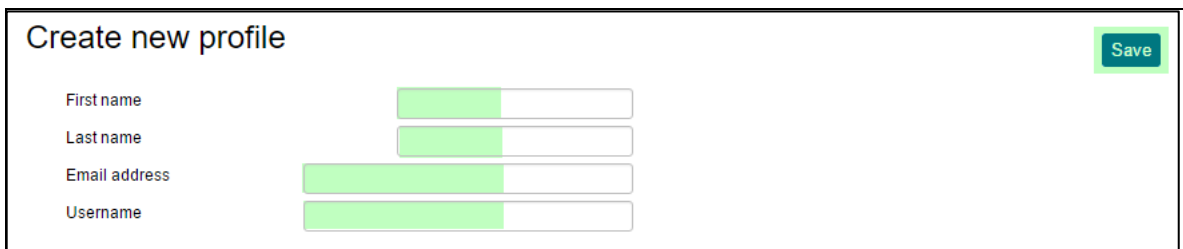
Please note new accounts must first be validated by the SPIN Administrator before use.

## Create new profile (SPIN Administrators only)

1. Login
2. Navigate to Administration > Profile Management > Create Profile



3. Complete the highlighted fields  
Click Save

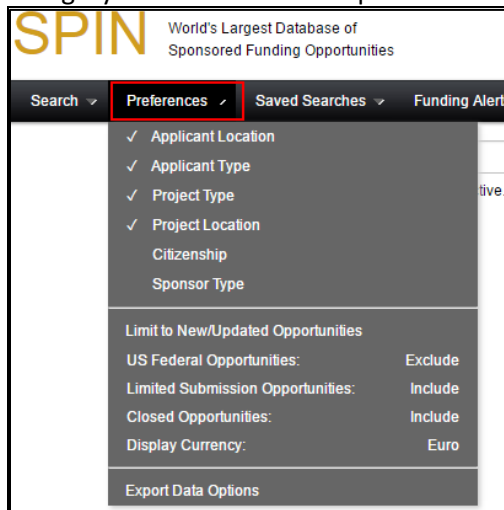
A screenshot of a web form titled 'Create new profile'. The form contains four input fields: 'First name', 'Last name', 'Email address', and 'Username'. Each input field has a green highlight on its left side, indicating where to enter information. A green 'Save' button is located in the top right corner of the form.

4. The new user receives an email to setup their password.

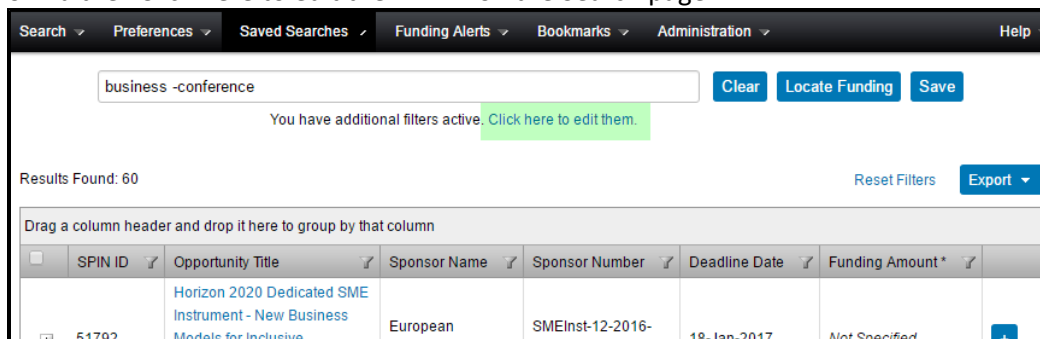
Administrators can use the new profile to store saved searches and setup SMART alerts immediately. The user will be able to login once they establish a password.

## Category Filters and Search Options

Category Filters and Search Options are accessible via the Preferences menu

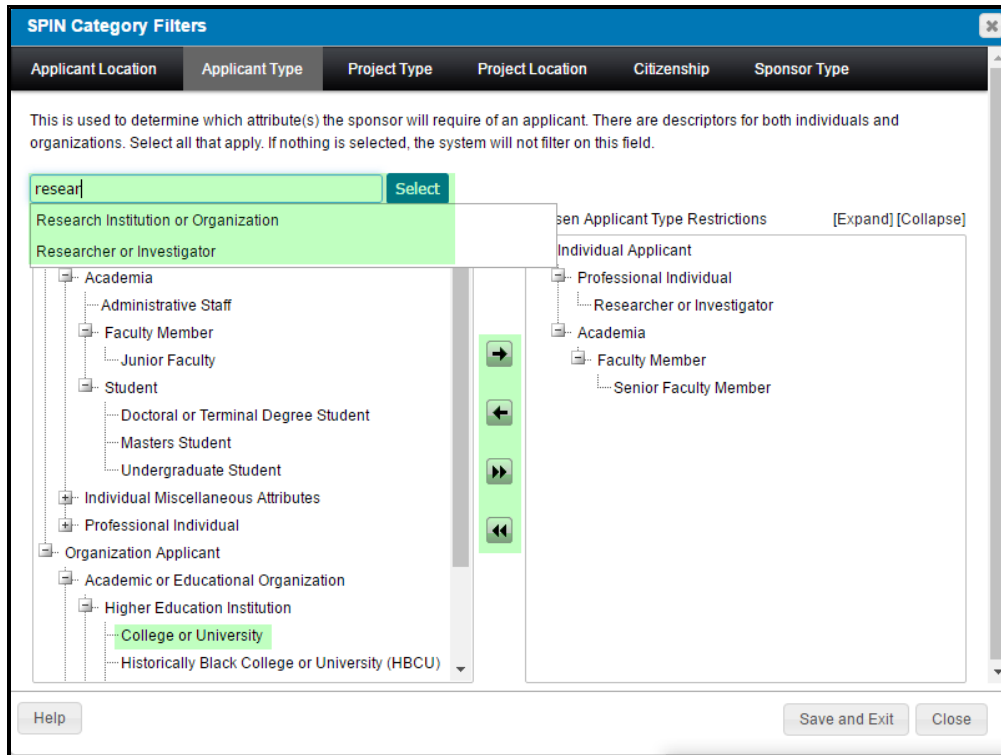


or via the “Click here to edit them” link on the Search page



## Category Filters

- Applicant Location – This will ensure that you only receive opportunities available to applicants based in your location.
- Applicant Type – Select any individual or organisation descriptors that apply.
- Project Type – Used to determine what types of projects the sponsor is looking to fund, or what type of work the sponsor is intending be done by successful applicants.
- Project Location – This is used to determine where the sponsor will allow the work to be carried out. You should select all locations that you are willing to travel to in carrying out an award.
- Citizenship – This is used to determine if the sponsor maintains specific citizenship status requirements for their opportunities.

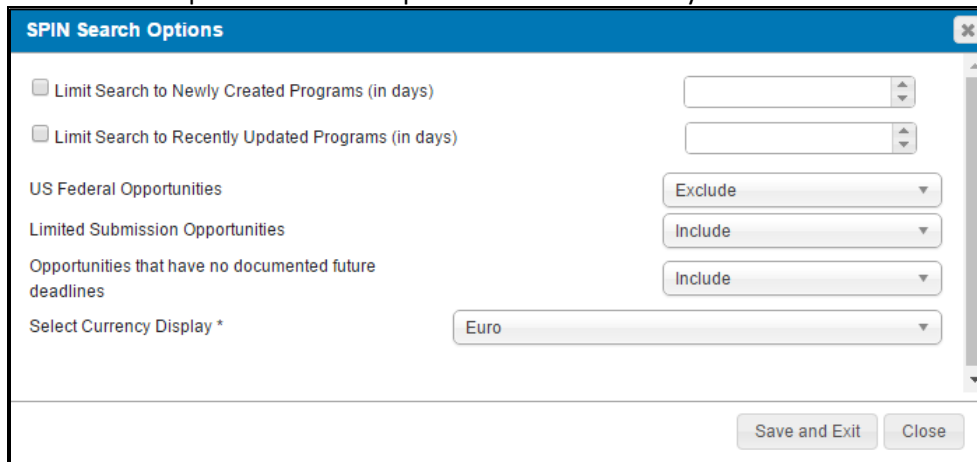


## Notes

1. All Category Filters are optional. If no value is selected for a Category Filter, the system will not filter on this field i.e., all results are returned
2. Use the progressive text search box to locate particular category filters. Use the Select button after choosing the desired filter
3. Alternatively use the Arrows to move category filters to / from the chosen list
4. Save and Exit to return to your search

## Search Options

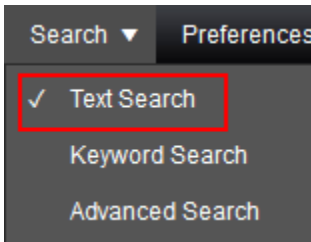
Select and setup various search options to further refine your search results.



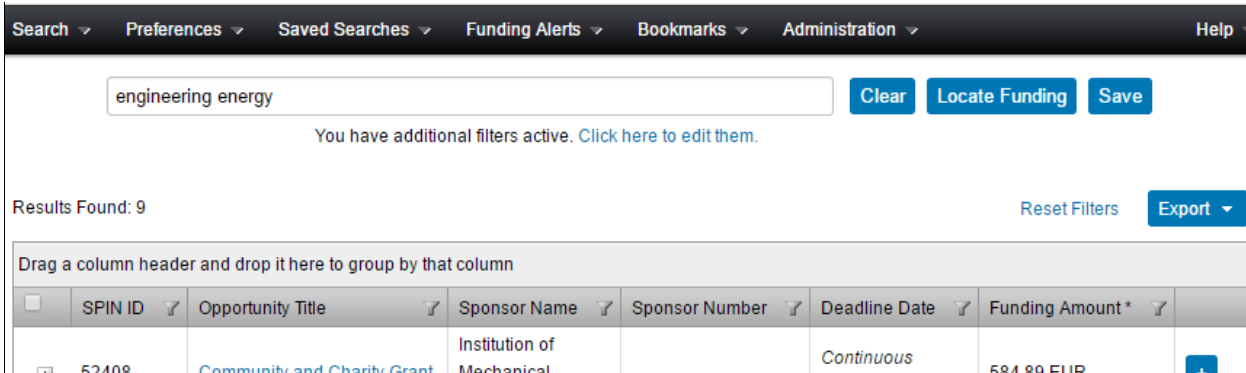
Save and Exit to return to your search.

## Text Search

A Text Search is the most commonly used search in SPIN.



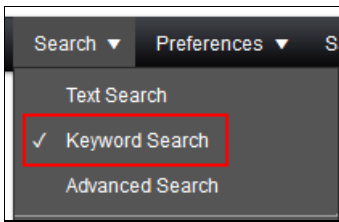
Search terms are matched against all data fields in the system.



The Text Search also has capabilities to build more complex searches. More information is available from the Help > Text Search Help menu item.

Example Input	Description
Scientific research	Searches for records containing <b>scientific</b> and <b>research</b> . Inflectional forms of <b>science</b> and <b>research</b> are included. <b>AND</b> is assumed in this example.
Scientific OR research	Searches for records containing either <b>scientific</b> or <b>research</b> . Inflectional forms of <b>science</b> and <b>research</b> are included. The <b>OR</b> must be specified.
"science research"	Wrapping terms in double quotes searches for records containing the phrase <b>science research</b> . Inflectional forms of <b>science</b> ( <b>science</b> , <b>sciences</b> ) are included such that results include <b>science research</b> and <b>sciences research</b> .
stem -cell	Inserting a minus symbol before a term searches for records containing <b>stem</b> and not <b>cell</b> .
lake*	Appending an asterisk to a term invokes a wildcard search: searches for records containing <b>lake</b> and any suffix (e.g. lakes, Lakeland, lakeview). Note that * cannot be the first character of a search.
b?ll	A question mark ? serves as a wildcard substitute for a single character. Searching for b?ll will return results for bell, ball, or bill.
b?ll "river basin" -columbia	Complex searches combining features can be used as in this example that will find results that include b?ll (bill, ball, bell...) <b>AND</b> the string <b>river basin</b> but will exclude opportunities containing the word <b>columbia</b> .

## Keyword Search



Click “Select Keywords” to select keywords to include in your search.

Use the keyword “Explorer” to browse Keyword categories and choose keywords.

The 'Keyword Explorer' interface shows a hierarchical tree of categories. The 'HEALTH AND SAFETY/MEDICAL SCIENCES/BIO...' category is selected. Below the tree, there are two panels: 'Choose keywords' and 'Selected keywords'. The 'Choose keywords' panel has a 'Select All' button and a list of keywords with checkboxes. The 'Selected keywords' panel shows the keywords 'Health Care Administration' and 'Health Care Reform'.

CATEGORY 1	CATEGORY 2	CAT
INTERNATIONAL/GEOGRAPHICAL REGIONS	Anatomical Systems/Sites	Child/Maternal Health
AGRICULTURE/FOOD SCIENCES/FOODS	Biomedical Engineering	Family Health/Planning/S
ARTS/HUMANITIES/CULTURAL ACTIVITIES	Disciplines/Fields, Health & Safety/Med/Biomedical	Folk Medicine
BEHAVIORAL/SOCIAL SCIENCES	Disease Entities/Medical Problems, Behavior	Health Care Administrati
EDUCATION	Education/Instruction (Health/Safety/Medical)	Health Care Reform
ENGINEERING	Environment (Health/Safety/Medical)	Health Facilities Studies
HEALTH AND SAFETY/MEDICAL SCIENCES/BIO...	Health Care	Health Insurance

**Choose keywords** Select All

- Child/Maternal Health
- Family Health/Planning/Safety
- Folk Medicine
- Health Care Administration
- Health Care Reform

**Selected keywords**

- Health Care Administration
- Health Care Reform

Use the Keyword “Searcher” lookup box to type into and locate particular entries. Click “Show subset” and select the desired Keywords.

The 'Keyword Searcher' interface shows a search box with the word 'Engineering' entered. There are 'Reset list' and 'Show subset' buttons. Below the search box, there are two panels: 'Choose keywords' and 'Selected keywords'. The 'Choose keywords' panel has a 'Select All' button and a list of keywords with checkboxes. The 'Selected keywords' panel shows the keywords 'Health Care Administration', 'Health Care Reform', 'Engineering Education', and 'ENGINEERING'.

**Choose keywords** Select All

- Agricultural Engineering
- Forest Engineering
- Aquacultural Engineering
- Food Engineering
- Engineering Planning/Policy
- Engineering Psychology
- Engineering Education
- ENGINEERING

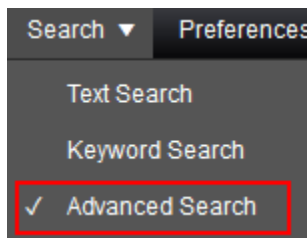
**Selected keywords**

- Health Care Administration
- Health Care Reform
- Engineering Education
- ENGINEERING

A keyword search matches keywords with those keywords attributed to a SPIN program.

Also, always ensure your Category Filters and Search Options have been configured appropriately.

## Advanced Search



For more regular users of SPIN the Advanced Search offers capability to use Boolean logic and nested searches using specific SPIN data fields.

For example, the search below can be described as:

Show me all opportunities where

- the word 'engineering' is contained in any data field in the entire program
- the word 'fellowship' is contained in the Synopsis field
- the sponsor contact country is either Germany or U.S.A.

Add New

Full Program	Contains	engineering	✕
Synopsis	Contains	fellowship	✕
Contact Country	Equal To	Germany	✕
Contact Country	Equal To	United States	✕

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

Results Found: 55

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount
<input type="checkbox"/>	22446	<a href="#">Leibniz-DAAD Research</a>	German Academic		None Posted	Not Specified

As always, please ensure your Category Filters and Search Options have been configured appropriately.

# How to Save a Search & Setup Funding Email Alerts

**Step 1:** Go to <https://spin.infoedglobal.com>

**Step 2:** “Sign In” with Username and Password or using Federated Login to access personal features such as Saved Searches and Email Alerts. You might need to click the ‘Sign In’ link at the top right of the screen to get to the login screen.

### Login

#### Sign in using SPIN™ credentials

Username

Password

Remember me? [What's this?](#)

[Sign In Help](#)

[Need to create a new profile?](#)

#### Sign in using institutional credentials

InfoEd Global became an authorized service provider with the InCommon Federation to provide SPIN™ users with easier access. If your institution appears below or in the pick list, you may login using your institutional credentials. If your institution does not appear, contact your institutional SPIN™ administrator to inquire about InCommon federated access.

Select your organization from the list below:

[Help](#)

OR

**Step 3:** Enter search terms.  
Click Locate Funding to execute search.  
Ensure Category Filters and Search Options are configured as desired.

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

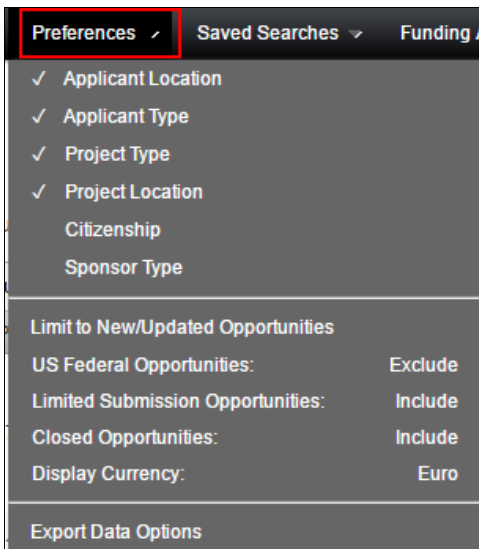
Results Found: 60

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	SPIN ID	Opportunity Title	Sponsor Name	Sponsor Number	Deadline Date	Funding Amount *
		<a href="#">Horizon 2020 Dedicated SME Instrument - New Business</a>				



Category Filters and Search Options can also be viewed / edited via the Preferences menu



- Step 4:** Click Save button  
Enter Search Name  
Select the email format and update frequency  
Save Changes

**Save Current Search** [X]

Search name

---

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

Receive email updates?

Update frequency

All new and updated funding opportunities which match this Saved Search will be delivered to the user via email or RSS feed depending on your choices.

**Step 5:** Manage Funding Email Alerts from the Funding Alerts menu

From this screen you may execute a search manually and manage the automation preferences

The screenshot shows the 'Manage Funding Alerts' interface. At the top, there is a navigation bar with 'Search', 'Preferences', 'Saved Searches', 'Funding Alerts', 'Bookmarks', 'Administration', and 'Help'. The 'Funding Alerts' menu is open, showing a list of search categories: 'Management', 'Mechanical Engineering', 'Renewable Energy', and 'Wind Energy'. The 'Wind Energy' option is selected, indicated by a checkmark. Below the menu, there is a table with columns for 'Run', 'Search Name', 'Date', 'SMARTS™ Automation', and 'His...'. The table contains four rows of data, with the 'Wind Energy' row highlighted in green.

Run	Search Name			SMARTS™ Automation		His...
	Management			None	None	
	Mechanical Engineering	25-Oct-2016	25-Oct-2016	None	None	
	Renewable Energy	25-Oct-2016	25-Oct-2016	None	None	
	Wind Energy	18-Nov-2016	18-Nov-2016	Weekly	HTML	