



Self Help Guide to

SPIN

World's Largest
Database of Sponsored
Funding Opportunities

http://www.geneseo.edu/sponsored_research

SPIN SEARCHABLE DATABASE MANUAL

SPIN is an extensive research funding opportunity database. It contains over 40,000 opportunities from more than 10,000 sponsors. With SPIN, you can:

- Access funding information online, from any browser
- Organize grant information in one convenient place
- Gain access to a large Keyword list, allowing for greater flexibility in your searches
- Quickly locate Limited Submission Opportunities, Federal, and non-Federal programs
- Locate all types of funding information—Fed Business Opps / Federal Register Guide
- Search for opportunities that have just been announced or modified within the last seven days
- Search for opportunities with impending deadlines within the next eight weeks or with open deadlines
- Search non-traditional Sources (e.g. crowdfunding)

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SPIN Basic Search Help

SPIN integrates with a modern full-text search engine. It is designed to allow you to perform simple or complex searches for funding opportunities.

Searches are carried out against the entire text of the SPIN programs, which includes:

- Opportunity titles
- Sponsor name
- Synopses
- Objectives
- Funding opportunity numbers
- Email addresses
- Keywords
- Several other fields

The search automatically invokes inflectional forms of the entered words.

For example, a search for **test** will scan all SPIN programs for: **test, tests, tested, and testing**. This can be disabled by inserting a plus sign (+) before the search term.

The search has the ability to pass the entered terms through an integrated thesaurus, potentially expanding the terms being searched for.

EXAMPLE

A search for **cancer** will scan all SPIN programs for **cancer, carcinogens, chemotherapy, tumors, oncology**, and other terms. This can be invoked for all terms entered by simply enabling the **Find Similar Terms** checkbox or by inserting a tilde (~) before each individual term you want passed through the thesaurus. Note that enabling the **Find Similar Terms** checkbox will not expand quoted strings (e.g. search term) via the thesaurus by default. You must insert a ~ before the quoted string.

The search also contains a number of capabilities to build complex searches with various logic and grammar parsing. The commands can be combined, along with parenthetical logic to dictate the order of operations, to build complex queries that define what you are looking for.

Table A: TEXT OPERATORS

Scientific research	Searches for records containing <i>scientific</i> and <i>research</i> or their inflectional forms
Scientific OR research	Searches for records containing <i>scientific</i> or <i>research</i> or their inflectional forms
"Scientific research"	Wrapping terms in double quotes searches for records containing the phrase <i>scientific research</i>
Scientific -research	Inserting a minus symbol (-) before a term searches for records containing <i>scientific</i> and <i>not research</i>
+scientific	Inserting a plus symbol (+) before a term performs search after disabling expansion for inflectional forms
Scient*	Appending an asterisk (*) to a term invokes a wildcard search: searches for records containing <i>scient</i> and <i>any suffix</i>
<scientific research>	Wrapping terms in angled brackets searches for records containing <i>scientific</i> and <i>research</i> and ranks results by the proximity of the two words .
~Scientific research	Inserting a tilde searches for records containing <i>scientific</i> or its related terms in the thesaurus, and <i>research</i>
~"Scientific research"	Inserting a tilde (~)before a quoted phrase searches for records containing the phrase <i>scientific research</i> or its related terms in the thesaurus

The Search Menu

The first menu on the SPIN Toolbar is the Search Menu, which is delineated into two sections, one set of choices that will need to be populated and another set of choices that are preconfigured. The features of this screen include the ability to:

- Drag and drop columns to reorganize data (or to double click or use arrows to move data from one column to another)
- Filter information using the filter icon
- Use arrows to change the order of presented data between ascending and descending, and vice versa
- Use View Details Arrows to reveal and hide information
- Export information to MS Word™ or MS Excel™

Search Modes

The Search Modes are located on the top portion of the menu:

- **Basic Search.** When SPIN is in Basic Search mode, a blank field is present on the screen. This field allows you to enter one or more search terms and to use text operators (listed in Table A).
- **InfoEd Keyword Search.** To conduct an InfoEd Keyword Search: Go to the Menu on the SPIN Toolbar.
 - Click on the **InfoEd Keyword Search** menu item. The main screen will be populated with the four primary components of the InfoEd Keyword Search function, which are: 1) the And/Or selector, 2) the Select Keywords link, 3) the text entry box (known as the SPIN Search field), and 4) the Locate Funding button.
 - Click the link. The InfoEd Keyword Search Popup will open. On this screen, select the keyword(s) for your search. There are two ways to select your keyword(s).
 - a. The first method involves using the text entry box and blue Select Link at the top, left of this popup to search for your keyword(s) by entering in your word/term.
 - b. The second method is to utilize the Available Keywords hierarchical keyword list to drill down and find your desired keyword(s) and then use the arrow buttons to move them to the Chosen Keywords list.
 - After the terms you want are in your Chosen Keywords List, click, which will close the popup and display the selected terms in the SPIN search box.
 - To proceed, designate whether to search in **AND** or **OR** mode. In either mode, the selected terms are being compared with keyword terms associated with each funding opportunity rather than the full text of the opportunity. The **default mode** for this AND/OR selector is **OR**.
 - Click **Locate Funding** to carry out the search.

- **Advanced Search:** Using the Advanced Search Mode allows you to set additional limits on your searches and often results in a lower number of returned opportunities but a higher level of relevancy. This function has the following components:
 - A pull-down menu of opportunity criteria;
 - A pull-down menu with a contains vs. does not contain option;
 - A blank search field for entering terms; and
 - A remove item function.

From the SPIN Home Screen:

- Click on **Advanced Search** in the Search Menu.
- A black, downward-facing arrow will appear: Click on the arrow and a drop-down list will appear giving you the opportunity to select either **AND** or **OR**.
- The **Add Expression Function** allows you to select one or more levels of criteria and to enter one or more levels of search terms. When selected, the Add Expression function is highlighted in white. To use the Add Expression Function:
 - a. Hover your cursor over the Add Expression Function. The Add Expression Function will be shaded in white and the Add Expression textual cue will appear.
 - b. Click on the Add Expression Function. A first-level criteria and search term bar will appear.
 - c. You can click on the Add Expression Function as many times as necessary, depending on the goal of your advanced search. Each time the function is clicked, an additional criterion and search term bar will appear, allowing you to add more levels of criteria and search terms. You can narrow down your searches by selecting one criterion from an extensive list, which includes 36 criteria (see Table B). If you do not use the pull-down menu to select a criterion, SPIN defaults to the Full Program Criteria. This means the *entire content of the opportunity will be searched*.
 - d. The **Advanced Search Mode** allows you choose keywords as your search expression. You can choose from your own saved groups of keywords, and/or from those that were shared with you by other users. Alternately, you may click on the **key icon**. This is the Keywords Icon.
 - e. From this point, you will conduct a new Keywords Search, save your new Keyword Group, then return to the Advanced Search Mode to access it as one of the Program Criteria.

Table B: 36 Criteria

Full Program	Contains
CFDA Number	Deadlines
Contact Address	Eligibility
Contact City	Established Date
Contact Country	Follow-Up Date
Contact Email	Full Program
Contact Fax	Funding Detail
Contact Name	Funding Opportunity Number
Contact Phone	Indirect Cost Cap
Contact State	Indirect Costs
Cost Sharing	Keywords
Cost Sharing Cap (%)	Limited Submission
Deadline Type	Objectives
	Open Application Period
	Open Application Period
	Revised Date
	SPIN ID
	Sponsor
	Sponsor Mechanism
	Sponsor Program URL
	Sponsor Type
	Sponsor Website
	Synopsis
	Target Groups
	Title
	Zip/Postal Code

Saving Search Parameters

Saving search parameters allows you to rerun well-designed searches, alter them, and rename them. Saving and naming search parameters also allows you to utilize ***SMARTS Email Notifications***. You can save search parameters by entering a new name for your search into SPIN or by overriding the parameters attached to a previously saved and named search.

The bottom portion of the Search Menu contains a few ***SPIN Quick Searches*** – preconfigured searches to get you to five commonly employed SPIN search options:

1. The ***New/Modified Opportunities*** presents opportunities that have been entered/modified within the past seven (7) days.
2. The ***Impending Deadlines*** presents opportunities with deadlines within the next 8 weeks or with open deadlines.
3. The Browse ***FedBizOpps*** presents Federally-sponsored opportunities that are often not listed on Grants.gov and tend to have strict eligibility requirements. These same opportunities may appear during other searches; they are included in the full SPIN database.
4. The ***US Federal Register Guide*** provides you with access to pared-down grants information that is most relevant to InfoEd Global's client base.
5. ***Non-Traditional Sources*** provides a listing of non-traditional research funding sources, including crowdfunding opportunities.

Opportunity Window

Within the **Opportunity Window**, you may do the following:

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

Bookmark Program appears on right side of the Opportunity window.

The Email Menu within the **Opportunity Information Window** allows you to send the information to yourself or others.

From the **Opportunity Details**, 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.
- Click on it.

Sorting

Clicking directly on the criteria name can be used to change the order of results among ascending or descending options, either numerically or alphabetically. For example, clicking on **Sponsor Name** will sort the results list data alphabetically from A to Z as indicated by the downward pointing arrow that appears after clicking. Clicking Sponsor Name again will re-sort the results list data in reverse order, and the arrow will now point upward.

Checkbox

You 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 hides the details.

Email Menu

You can use the **Email Menu** within the **Opportunity Information Window** to send the information to yourself or others. 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. Click your mouse. The Email Opportunity Window opens up. 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 you to the Opportunity Information Window.

Similar Opportunities Window

From the **Opportunity Details** 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.™

Sorting Results

Once you have a returned a set of results, you can view that data in various presentations. This is called sorting. Sorting differs from filtering; with sorting you manipulate how the same total amount of data appears on the screen, and with filtering, you set parameters to limit the amount of data returned and change how it appears on the screen.

Modifying Column Presentation

You can modify the order of column appearance by moving the columns' positions using a drag and drop feature. The SPIN **Returned Results Screen** defaults to the following presentation order, from left to right: SPIN ID; Opportunity Title; Sponsor Name; Sponsor Number; Deadline Date; Funding Amount; and Bookmark. (Click to reset the Returned Results Screen to the default column order.)

Group by Feature

You can drag and drop columns within the Returned Results Screen into an empty header above the returned results. This is called the **Group by Feature**. This feature differs from modifying the column presentation (described above). The latter affects the appearance of the returned results. In contrast,

using the **Group by Feature** allows you to create your own primary and secondary sorts, and add as many layers of sorting you want.

EXAMPLE

Click within the Sponsor Name Column Header and hold your mouse button down. The header color will change from grey to white. With the mouse depressed, drag the column into the Group by Header. The Returned Results Screen changes significantly. You 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, they will be grouped together. You can add as many criteria to the header as you want. You can also rearrange the order of the criteria by moving them around the header in any fashion you want. To remove a criterion, click on the X within its title. You can also simply drag the criterion off of the header area to remove it.

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

The Filtering Dropdown Menu

Allows you to filter your returned results by:

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

Bookmarks

Bookmarking Opportunities

From the Returned Results Screen, you 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 you create. You can then add to existing groups of bookmarks to organize similar bookmarked opportunities. Once the bookmarks are created, you can utilize the Bookmarks Menu during subsequent SPIN sessions to reaccess the marked opportunities.

Manage Bookmarks

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

Go to the **Bookmarks** Menu on the SPIN Toolbar and click on the **Manage Bookmarks** item. The **Bookmarked Opportunities** screen opens to a display of all the opportunities you have previously bookmarked.

A checkbox gives you the opportunity to share the new group with other users. If the other users opt to click into it, then their new group will be shared with others within their institution. Clicking **Save Changes** results in the new group name appearing in your bookmarked opportunities.

Public Bookmarks

In the **Public Bookmarks** area, you can access folders of bookmarked opportunities that have been shared by their administrator. However, only administrators can share bookmarked opportunities or folders in the public area.

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