

INTRODUCTION TO SPIN / SMARTS / GENIUS

Keene State College currently subscribes to three interrelated systems from InfoEd, which are housed on a UNH server. Anyone can use the system without a password from any computer with a www.keene.edu address. To log on to the system go to <https://infoedresearch.unh.edu>. Click on Info Office, then Info Search. You can choose to participate in any or all of these systems from there. The following descriptions explain what the three systems are and should help you decide what combination of services would be most helpful for your individual needs.

A. **SPIN** is the name for the database of funding information that serves as the core to InfoEd's services. There are over 10,000 funding opportunities in the SPIN database. The breakdown is approximately 50% federal programs and 50% private. You can search the database from any computer that has access to the world wide web. Most people choose to search the SPIN database through a system of keywords. However, there are also several other ways to search the SPIN database. Although a SPIN search is a very powerful tool, it is purely temporary. **A SPIN search is a one-time search. Therefore, if you have a stable set of interests, the most efficient way to gain funding information is to run one SPIN search in order to find out now about all opportunities in the database and then register for SMARTS in order to keep apprised of any new opportunities or changes that may take place**

B. **SMARTS** provides you with individually tailored information about grant opportunities via email. You must use the internet to subscribe, but then all information comes directly to your email account. The information about grant opportunities comes from InfoEd's SPIN database. SMARTS sends you information about new opportunities as they arise and about updated entries in the database. Because InfoEd updates each entry in the database once a year, you would receive all pertinent information in the database over the course of one year. If you are not concerned about immediately finding funding, but are interested in keeping abreast of opportunities as they arise, then subscribing to SMARTS without a SPIN search should be sufficient. You can change whenever you wish the criteria that control what opportunities you receive.

C. **GENIUS** is very closely intertwined with SMARTS. By registering for SMARTS / GENIUS (i.e. for SMARTS or GENIUS or both), you create a personal "profile." These profiles create a searchable database of participants' interests and expertise. If you register for SMARTS, you automatically have a profile that is accessible through a GENIUS search. Entering information in GENIUS simply allows you to provide more information about yourself and your interests: education, employment history, publications, research interests, etc. If you do not wish to participate in SMARTS, you can still enter a GENIUS profile. By making all UNH GENIUS profiles as complete as possible, we will attain a very useful university resource: we will have a centralized database that allows us to find out what UNH's strengths are and to connect individuals with similar interests. In addition to entering a personal GENIUS profile, you also have the option of searching the GENIUS database for other people with similar interests.

For help with a SPIN search and/or SMARTS registration, For assistance with any of these InfoEd tools, call (2-2902) or email gretchen.forbes@unh.edu

Instructions for using one set of criteria to run a SPIN search and to register for SMARTS / GENIUS

These instructions are most appropriate for people who have a fairly stable set of interests and who are interested in getting the most funding information (that is applicable) both now and in the future. The process of running a SPIN search and registering for SMARTS usually takes 1 to 1-1/2hours.

Introduction. Because SMARTS (the email service for funding information) only gives you information about new opportunities and updates, many people find it worthwhile to run one SPIN search before registering for SMARTS. The advantages are twofold: 1) you find out what is currently in the database and 2) you get a sense of how much email you will be receiving before you start receiving it, and can make changes accordingly.

Running the SPIN search

- I. **Getting There** - InfoEd recommends that you do this using Netscape Communicator 4.0 higher or Internet Explorer 4.0 or higher.
 - A. Go to <https://infoedresearch.unh.edu> or choose your bookmark "InfoEd Internationals Spin 2000" and go to D
 - B. Select "Access Info. Office"
 - C. Select "Info. Search"
 - D. (I would bookmark this page.) Select "SPIN" or "\$"
 - E. Click on "GO"
 - F. You should now see a screen that says "SPIN USA." This is the main search screen.

- II. **Conducting a Basic SPIN Search**
 - A. Select a category through which you want to conduct your search. You need not have something in every category. Most people fill in keywords, applicant types, and geographical restrictions. If you are not a US citizen, you may want to include citizenship. A few people also include award type.
 - 1..Each time you select a category, you will be presented a list of terms from which to choose. **If you want to choose more than one term in any category, be sure to hold down the control key (IBM), or the apple key (Mac) while you select multiple terms.**
 - B. Select "Keywords." This will bring you to a page entitled "Keywords" that lists several subject headings.
 1. To browse through the keywords in any subject heading, click on the subject heading itself (**do not click on the box next to the subject heading; this would indicate that you wanted all the terms on that list!**)
 - a. While holding down the control or apple key, click on all the terms in which you are interested.
 - b. Click on "Save Criteria." This will return you to the main "keyword" page.
 - c. Repeat the process for all subject headings that could possibly be of interest.
 2. If you feel that the keywords you saw when browsing through the lists did not adequately cover your areas of interest, you can also use the "Search for Term" option.
 - a. Click on the white box to the left of "Search for Term" and type in a word that interests you. If the term has many permutations, pick the lowest common denominator. For example, if you are interested in disabilities, type "disab" in order to see keywords that include both

- “disabled” and “disabilities.”
- b. Click on “Search for Term.” This brings up the list of appropriate keywords. Click on any that interest you (holding down the control/apple key) and then select “Save Criteria.” If no keywords interest you or if there are none listed, click on the back arrow in the blue field to return to the main keyword page.
3. After you have selected all the keywords that you want, click on "Return to Main Search Page"
- C. Select "Applicant Types." This will allow you to narrow your search to things for which you are eligible to apply .
1. From the list that comes up, select all terms that describe you or the organization through which you would apply for a grant (i.e. UNH). You can also include other organizations that might apply for a grant for you (e.g. if you work closely with K-12 schools, you could select "Precollegiate Institution"); however this is an option only in SPIN, not in the SMARTS email system. In SMARTS, you will only have control over the terms that describe you as an individual (the institutional parameters are set for all of UNH).
 2. Be sure to select "Individual, non-specific" and "Institution, Non-specific."
 3. When you have selected all applicable terms, click on "Save Criteria" to return to the main page search.
- D. Award Types (optional). I do not recommend using this criterion to narrow your search if you are interested in all types of grant opportunities. This field should generally be used only if you are not interested in traditional research opportunities and want to narrow your search to things like curriculum development and out reach opportunities.
- If you do chose to use this criterion, select "Award Types." From the list that comes up, select all applicable terms, and then click on "Save Criteria."
- E. Select "Geographical Restrictions." This field will allow you to avoid opportunities limited to applicants from other regions of the country. This category refers to the place from which you are applying(i.e. UNH), **not** the place where you would like to do research.
1. Select "No Restrictions" as well as all terms that could possibly apply to NH (Atlantic, East, New England, North, Northeast, New Hampshire).
 2. Click on "Save Criteria" to return to the main search page.
- F. Select "Locations Tenable" if you wish to narrow the area where your research will take place. Include "Any/No restrictions."
- G. Click and hold " ^ " near the top right. The default is the first 25 programs. You may wish to choose 250 or 500 so you will receive a full list of selected programs.
- I highly recommend that you print this page before you go any further.**
- Anytime you come back to SPIN, you would need to reenter all criteria. Therefore, it can be quite helpful to have a record of what you have searched for.
- H. Click on "Run Search"
1. If you wait for two minutes and then get an error message that says "document contains no data," then you have included too many search items. If this happens, you should click on "Delete Item". Click on the boxes next to a few keywords that are less important to you at the moment, especially very broad keywords, and select "delete items" at the bottom of the page. Then try "Run Search" again.

III. Looking at the Search Results

- A. The number of programs is the number of results that your search has produced. If you enter the same set of criteria into your SMARTS email profile, you can expect to get roughly this number of email messages over the course of a year. For example, if the number of programs is 250, you can expect to get approximately 250 email messages a year, or, on average, one per weekday.

- B. Before you spend time looking through the full list, I recommend clicking on the words of one entry (not the box to the left) in order to see what sort of information is included in each entry. Here are some notes about what you will find:
1. The top two lines (mostly dates) refer to InfoEd (the company that produces SPIN), not the program sponsor. They have nothing to do with when you should apply for anything. The "Review Date" is when InfoEd last checked if this information was correct. The "Follow Up Date" is when they plan to check again. These two dates are usually approximately a year apart.
 2. Next, you get information about the sponsor of the program. Do not be overly concerned if the deadline date has passed. Often the program in question is an annual program, and InfoEd is keeping up information from the old guidelines until the new guidelines are released. If you are interested in the program, you should contact the sponsor to see if they expect the program to continue.
 3. The "Synopsis" is a very short description of the program. In the email that you will receive from SMARTS, the "Synopsis" comes up first in the "full program" format so that you may be able to tell very quickly whether it is worth your time to read through the rest of the description.
 4. The "Keywords" at the bottom of the page are the keywords associated with this program. At least one of them should match the keywords that you used (or else be under a "higher order" term that you used). It can be helpful to look through these keywords in two instances:
 - a. If you find you are getting a lot of programs that don't interest you, try to see if it is a consistent keyword or two of yours pulling them up. If so, consider not using that keyword in further SPIN searches and deleting it from your SMARTS profile.
 - b. Conversely, if you find a program that is just perfect for you, look through the keywords to see if there are some that you did not think of that, in retrospect, you may want to include in future searches or in your SMARTS profile
- C. Keep in mind that when you register for SMARTS, you will begin to get this same information via email, but it will take a year to get all of it. Therefore, how much time you spend looking through this list now is largely a function of how much you want to learn about all opportunities versus how willing you are to get the information gradually.
- D. There are four common ways of approaching the list of results. Which you choose depends largely on how much time you want to devote now. I recommend choosing the first or second option.
1. If you have the time now, you can read through this list of program titles and download the ones that are of interest. To do this:
 - a. Click on the boxes of all the titles that look interesting.
 - i. I recommend clicking on no more than 50 at a time because you can overload the system
 - ii. You may want to skip titles that have a "T.S." or "Temp. Susp." After them. These indicate the program has been "temporarily suspended" (i.e. the sponsor hasn't canceled the program, but they have no money).
 - b. Go to the small box at the bottom of the page.
 - i. I recommend choosing "Summary Format" first under "Report Options" because the "Full Program" is 2 - 3 pages or longer.
 - ii. Choose whether you want to "Display to Browser/Print" (which would bring the results up in Netscape or Internet Explorer and allow you to print there) or "Save to File" (which will save all the information in a file on your computer which you can open with a word-processing program).
 - c. Click on "Build Report". If you chose "Display to Browser/Print", the program descriptions will be on your screen for reading and/or printing. If you chose

"Save to File," click on "Download Report", then follow the directions on your screen.

- d. You can then click on the back button to return to the list if you want to download some more programs. NB: check to see if the boxes you clicked on before are still selected. If so, you will need to click on them again to "deselect" them before selecting more program titles.
2. If you don't have time now, but want the option of looking through these results later, you should print out the list of titles. Note that each title begins with a 5 digit number. This is InfoEd's "program number." Later, when you have time, you can return to the SPIN search page, enter the program numbers that interest you under the "program number" field, and click on "Run Search." This will allow you to see the programs that interest you without reentering your search criteria. To download these results, see the directions in "1" (directly above).
3. Some people who have lots of time and do not want to save or print things that are not of interest, choose to look through this list item by item right now. Rather than clicking on the boxes to the left of each title, you can click directly on the titles that interest you and print those entries that still look interesting after you have read through them (then click on the back button to get back to the list).
4. A few people, after they have assured themselves that they will not be inundated by too much email when they register for SMARTS decide that they don't want to look through the search results now after all. If so, you can go directly to registering for SMARTS.

IV. Refining a search. If you get too many or too few results to be useful, you may want to refine your search. If so, select the back button when you are at the page with the list of titles; this should return you to the "SPIN USA Search Engine" page. You can select "Clear" from the bottom of the page in order to start all over again, or you can add and delete items as you think best. To add items, simply select the category in which you want to add, and select more items (remembering to hold down the control or apple key if you are selecting more than one item in a category). To delete items, select "Delete Item" at the bottom of the "SPIN USA Search Engine" page. When the list of your criteria comes up, check any items that you want to delete, and then select "Delete Items" at the bottom of the page. This should return you to the main search page where you can run the search again.

Registering for SMARTS/GENIUS

I. Getting There

- A. Go to <https://infoedresearch.unh.edu> or open your Bookmark "InfoEd Internationals Spin 2000," go to D
- B. Select "Access Info. Office"
- C. Select "info. Office"
- D. Select "SMARTS/GENIUS"
- E. If you were considered a faculty member in October 1997, you should already have a rudimentary SMARTS/GENIUS profile because OSR seeded information for all faculty at that time.
 1. If you were faculty in 10/97 and do not remember the username and password that you were assigned at that time, call or email Hilda Rideout at OSR (2-2002,

hilda.rideout@unh.edu) to find out what they were or call InfoEd to get your password reassigned. You will need to get a valid username and password before proceeding further.

2. If you were faculty in 10/97 and do remember your username and password:
 - a. Select "Update Existing Profile."
 - b. Enter your username and password
 - c. You should now be on a page entitled "Profile Summary Page." Skip to "II" (below)
3. If you were not faculty in 10/97:
 - a. Keep in mind that at any subsequent time you want to enter your profile, you will select "Update Existing Profile," but for your initial registration, select "Create a New Profile."
 - b. Select "University of New Hampshire" and click on "Continue."
 - c. Fill in the registration and then click on "Submit."
 - d. You should now be on a page entitled "Profile Summary Page."

II. **SMARTS.** In order to receive email about funding opportunities, you must fill in information under "General" and "Keywords" and you may narrow down the number of opportunities sent to you by filling in "Applicant Types," "Award Types," "Geographical Restrictions," and "Sponsor Types." If you have the printout you made while doing the SPIN search (with the heading "SPIN USA Search Engine"), you can quickly remember which criteria you chose.

- A. "General" You have already filled in your email address and department which are the only essential parts to this screen in order to receive mail. However, it is recommended to fill in the rest of the page, and especially to look at the four questions at the bottom of the page.
 1. The first question at the bottom of the page is "Would you like your profile information to be available via GENIUS searching done on a global network or, only to others at your institution?" This is asking whether you want your profile to be accessible to any one who has registered with InfoEd (that would include other universities, some industry and some government agencies) or only accessible to people searching at UNH. So far, we have not heard of anyone receiving unwanted contacts, and we recommend that you set your profile for "global access." (i.e. accessible by anyone who registers with InfoEd). By making all UNH GENIUS profiles as complete as possible, we will attain a very useful university resource: we will have a centralized database that allows us to find out what UNH's strengths are and to connect individuals with similar interests.
 2. The next statement is "SMARTS output/'hits' will be emailed to you as SPIN matches are found on a daily basis. Select 'Yes' to receive your hits ('No' will discontinue this email service.)" This is basically the "Off" button. If you change this to "No," you will stop receiving email (Note, this will not delete your profile, just stop you from receiving email.) InfoEd does not save the mail that it does not send; so I don't recommend turning this off unless you plan to be away from your email for a significant amount of time.
 3. I recommend all your hits in one email if you choose "Summary" in #4 below. Most people who choose "Full Program" in #4 (below) prefer to switch the option to "One hit per email." If you don't change this, on days when more than one program announcement is sent to you, they will all come in one email message that you will need to scroll through to see what is there. Most people prefer to get a separate email message for each full program opportunity so that they can easily delete it if it is not of interest.
 4. InfoEd recommends "Summary Format." This gives you a very limited amount of information about a particular program, but you can click on it for the full program if it sounds promising. Some people prefer "Full Program" format for their output.

5. When you have completed this page, click on "Save" at the bottom.
- B. "Keywords"
1. I recommend choosing "Exact Matches" instead of "Hierarchical Matches." The keywords are set up in a hierarchy, and if you choose "Hierarchical Matches" and select a general keyword, you will receive information about opportunities under that general keyword as well as under its more specific parts. For example, if you select "Biological Sciences," you will also receive all information that has been keyed to all the keywords under "Biological Sciences," including "Biology, Cellular," "Biology, Conservation," "Biology, Metabolic," etc. If you choose "Exact Matches," you will receive only funding notices that actually contain the keyword "Biological Sciences" (If you want some but not all of the keywords that fall under a "parent" term, you should select exact matches and then physically select each of the keywords that you want.)
 2. Select each appropriate subject heading.
 3. Select all the keywords that you want to include (holding down the control/apple key).
 4. Click on "Save Criteria."
 5. When you have selected all the keywords you want, click on "Save."
- C. Select "Geographical Restrictions." "No Restrictions" should already be selected. Select also, U.S. Atlantic, U.S. East, U.S. New England, U.S. North, U.S. Northeast, and New Hampshire. Click on "Save" (at the bottom of the page).
- D. Select "Applicant Types" Click on (i.e. "deselect") all applicant types that do not apply to you. Click on "Save" (at the bottom of the page).
- E. Select "Award Types" and/or "Sponsor Types" if you want to narrow down your profile even further.

III. GENIUS

- A. Select any categories for which you want to enter information.
- B. To see how your profile looks at any point, select "Full Profile View."

IV. FINAL NOTE

- A. When you have finished adding information to your profile, return to the "Profile Summary Page." (If you are not already there, simply click on the left arrow near the top of the page.) Select "Log Out" at the bottom of the "Profile Summary Page."