

#### Login via spin.infoedglobal.com

A streamlined login screen applicable for all users to access SPIN/SMARTS configurations and functionality is shown in Figure 1 below.

SPIN World's Largest Database of Sponsored Funding Opportunities	S	Sign In
Search v Preferences v Saved Searches v	Funding Alerts 🤝 Bookmarks 🛩	Help 🛩
Login		
Login ID: Password: Remember me? What's this?		
Sign In Help	Login	
Need to create a new profile?		
		© 2015bal   Legal

Figure 1: Streamlined SPIN login screen.

Users can login to SPIN with their Login ID (username) and password credentials or get self service login assistance if needed via the 'Sign In Help' option, which is further described below. Help text is provided on mouse over for links in the sign in screen (Figure 2).

	Login		
ou check Remember Me, your session will remain active for or m the time of login. If you do not check this option, your brows I end when you close your browser.	one month ser session Login ID:		
	Password:		
Click here if you	Remember mc204/havia this?		
don't remember your password;	Remember me (what's this?)		
don't know if you have an account/profile:			
indon third in you have an account promo,			
need to create a new profile; want to link your InfoEd campus software profile to	SPIN	Login	
need to create a new profile; want to link your InfoEd campus software profile to	SPIN Sign in Help	Login	
need to create a new profile; want to link your InfoEd campus software profile to	SPIN SPIN Need to create a new profile?	Login	Sav
need to create a new profile; want to link your InfoEd campus software profile to	SPIN	Login	Sav
Create Profile Please enter your information to create a new profile. After the profile of the	SPIN SPIN Need to create a new profile? ter clicking, Save, you will receive an email confirmin	Login ng the submission of your request to yo	Sav
need to create a new profile; want to link your InfoEd campus software profile to Create Profile Please enter your information to create a new profile. Aff institution's SPIN administrator.	SPIN SPIN Need to create a new profile?	Login ng the submission of your request to yo	Sav
need to create a new profile; want to link your InfoEd campus software profile to Create Profile Please enter your information to create a new profile. Aff institution's SPIN administrator. First name	SPIN SPIN Need to create a new profile? ter clicking, Save, you will receive an email confirmin	Login	Sav
need to create a new profile; want to link your InfoEd campus software profile to Create Profile Please enter your information to create a new profile. Aff institution's SPIN administrator. First name Last name	SPIN SPIN Need to create a new profile? ter clicking, Save, you will receive an email confirmin	Login	Sav
need to create a new profile; want to link your InfoEd campus software profile to Create Profile Please enter your information to create a new profile. Aff institution's SPIN administrator. First name Last name Email address	SPIN SPIN Need to create a new profile? ter clicking, Save, you will receive an email confirmin	Login	Sav

Figure 2: Sign In Screen help content.



### **User Self-Service Login Assistance**

Clicking 'Sign In Help' (1) opens access to additional information on the right side of the screen. The user enters his/her email address (2), clicks 'Find My SPIN Account (3), and if there are multiple profiles with that email address, selects the correct profile based on the user name displayed. If the user only needs to retrieve his/her username (Login ID), they can use the left pane to continue to login at this point. If the user does not know their password, s/he can click Reset Password button, which will generate an email message with a link to change their password (Figure 3).

SPIN World's Largest Database of Sponsored Funding Opportunities	SPIN Maintenance Sign In Password change reset successful × Password change request has been sent to the specified email address
Search V Preferences V Saved Searches V Funding Ale	rts > Bookmarks > Help >
Login	**********
Login ID:	Sign In Help
	Email address
Password:	twood@infoed.org 2
	Find My SPIN Account
Remember me? What's this?	
	Select the appropriate user if more than one name is displayed below:
Sign In Help 1	Roger Wood (rogerwood)
	Roger Wood (roger_w_wood)
	Reset password 6
Need to create a new profile?	

Figure 3: Sign in help

The user will receive an email message similar to the one shown below if Figure 4. Clicking the link in that message will open a new browser screen allowing the user to set their new password. This link will expire after a period of time defined in Administration > Profile Management > Username/Password Management, shown in Figure 5.

	SpinSupport				
S	Wednesday, August 12, 2015 at To: Wood, Roger	4:31 PM			
ction Items				Mana	ige Apps
			1	info <b>Ed</b>	SPIN
Your p	password has bee	n reset	w to access SPIN to	o choose a new pass	word.
You recently You recently http://orbistr encoded=ey	Dassword has bee requested that your password be r est.dminfoed.infoed.org/Authorize/R JJ02W1wTGBnaW5JZCI6/GJCODh	n reset eset. Please click on the link bel eset? NKFGMS00M0RELTQ2ODY10	w to access SPIN to	o choose a new pass	word.
You recently You recently http://orbiste encoded=eg	Dassword has bee requested that your password be r est.dminfoed.infoed.org/Authorize/R U02W1wTG9naWISJ2CI8IC.JCODh	n reset eset. Please click on the link bel aset/? ENKFGMS00MORELTQ2ODY10 ror or have any questions, pleas	w to access SPIN to DBDNS1DOUUzOD a contact your SPIN	o choose a new pass JERENGOUMILCAid administrator at:	word. W5pcXVIX2I

Figure 4: Password reset email example

Search Preferences Saved Searches Funding Alerts Bookmarks Administration	Help → Save
Enforce username security?	
Minimum username length:	8
Enforce password restrictions?	
Minimum password strength:	Weak
Minimum password length:	8
Minimum number of lower case characters:	0
Minimum number of upper case characters:	0
Minimum number of symbols (e.g., @@, #, \$, etc.):	0
Minimum number of numbers:	0
Enforce password expiration?	
Expires (in days):	0
Minimum password age (in days):	0
Remember this many previous passwords:	0
Remind user before password expiration (in days):	5
✓ Require password change on first login?	
Link expiration for reset password (in minutes):	20

Figure 5: Administrator username

#### **New Profile Creation by Users**

New users can also log profile requests directly from the SPIN sign in screen by clicking on the 'Need to create a new profile?" link at the bottom of the login pane (Figure 6).

SPIN	World's Lan Sponsored	gest Database of Funding Opportuni	ties	
Search - Prefe	rences 🗵	Saved Searches	- Fundin	g Alerts ᠵ
Login				
Login ID:				
Password:				
Remember me	? What's this	?		
Sign In Help			Log	in
Need to create a ne	w profile?	1		

Figure 6: New profile creation request by user

The user receives on-screen and email acknowledgements of their profile request, as demonstrated in Figure 7 below. The assigned administrator will receive a similar email notification that a new is profile pending review and can act on profile requests via the profile review screen (Administration > Profile management > Review Profiles), also shown in Figure 7.



arch v Preferences v Saved Sea	rches 🗵 Funding Alerts 🖘 Bookmarks 🖘	Help 🗸
create Profile base enter your information to create a new stitution's SPIN administrator.	v profile. After clicking, Save, you will receive an email confirming the submission of your request to your	Sava 2
First name	R Wayne	
Last name	Wood	
Email address	nwood@infoed.org	
Username	rwayne	
Your profile information has been submyour request.	Itted to your institution's SPIN administrator. You will receive an email when your administrator either approves or denies           Image: I	
Your profile information has been subm your request.	Itted to your institution's SPIN administrator. You will receive an email when your administrator either approves or denies	_
	али новы недиас новы недиас новы нелану дургоча насак 660р	o. ~
SP	IN Profile Request: Profile Pending Approval	-1
	S Priday, August 14, 2015 at 8:35 AM Te: Wood, Pager	
	4 infoEd	SPIN"
Y	our profile has been successfully submitted.	
r.	proved, your account should be generally active within 24 hours.	
Fin	t name: It wayne	
Search v Preferences v Saved	Searches V Funding Alerts V Bookmarks Administration V	Help 🗵
Profile Review		Save
Unreviewed *	Profile to be notified about pending profile actions: James Finney	Ŧ
Submitted On 🍸 First Name 🍸	Last Name - 7 Email Address 7 Username 7 Review	
14-Aug-2015 R Wayne	Wood nwood@infoed.org nwayne 5 Unreviewed	
- 08-5eb-2012	wind the man and the second and the second s	- and

Figure 7: Profile reqest and approval process

Comment points in Figure 7 are: (1) user completes profile request form and (2) saves the form. (3) User is notified on screen of the profile request submission and (4) user receives an email verification of request submission. The assigned administrator receives email notification of a pending profile request and can (5) review pending profiles in SPIN Administration.

Upon approval of his/her profile, the user will receive an email notification to that effect, which includes a link to allow the user to complete their profile configuration by establishing a password (Figure 8). Rules for password format (length, characters, etc.) can be managed in the Username/Password Policies configuration shown in Figure 5 above.

Message	이 이 이 아이들 SPIN Profile Request: Request approved - Inbox	
SPIN Pro	ofile Request: Request approved	
S	SpikSupport Trobus August 14, 2015 at 8:59 AM To: Wood, Roger	-
	infoEd SPI	N*
Your recent r below. If you	Irofile has been approved request for a SPIN profile has been accepted by your institution's SPIN administrator with the username and password you specified. You username is shown are unsure of your password, please click the Reset Password link to reset it.	_
Username:	rwayne	
Password:	Reset Password	
Click the foll	owing link to access SPIN now: https://spin.infoedglobal.com/	
If you believe	e you have received this email in error or have any questions, please contact your SPIN administrator at:	
James Finne jfinney@info	<b>ry</b> eed.org	

Figure 8: Profile approval email to user

### InfoEd Enterprise Software Clients – Direct SPIN Access

For clients who use InfoEd's enterprise software solutions for proposal development, grants management, compliance, conflicts of interest management, technology transfer, or others *in addition to* SPIN, users are now able to access SPIN from the InfoEd portal as in the past and also directly by going to the the SPIN website (spin.infoedglobal.com) and linking their enterprise software profile to a SPIN profile. This process is depicted in Figure 9.



Figure 9: Enterprise client user profile linkage process

After entering their email address (1) and clicking 'Find My SPIN Account' (2), the user will be presented with a list of profiles associated with the address (3 – this list will not be presented if there is only a single profile). Clicking 'Connect' (4) will generate a system-generated email message (Figure 10) with a link that must be clicked to complete the linkage of their profiles and to establish their SPIN credentials.

infoEd	SPIN
Connect to your institution profile	
You recently requested that to connect to your institutional InfoEd profile. Clicking on the link below will connect you to SPIN to verify your profile. You will be prompted to enter a username and password. After setup, you will be able to connect to SPIN without connecting first to your admin client software.	
http://orbistest.dminfoed.infoed.org/Authorize/Connect/?encoded=eyJ1bmixdWVfaWQiOiAiSU5GT0VELTU4NDM3NTQwMCJ9	
If you believe you have received this email in error or have any questions, please contact your SPIN administrator at: James Finney jfinney@infoed.org	

Figure 10: Enterprise client profile linkage confirmation email

Note that the credentials these users establish for direct access to the SPIN website are distinct from the credentials they use to access the enterprise software environment. If your campus uses a single sign-on system to manage access to the InfoEd enterprise software environment, those single sign-on credentials will not be passed to SPIN for direct login via the website.

Once a user completes this *linkage* procedure, they can access SPIN either by visiting the SPIN web page directly or by clicking the button from their InfoEd software portal. Any searches saved or configured with SMARTS automation will be visible regardless of the method of access. Should a user find this is *not* the case, you will need to log an ITEMS ticket so that InfoEd support staff can consolidate multiple profiles for that individual. This will at most be a one-time issue for any given person (and should not be an issue at all for most users).