

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.

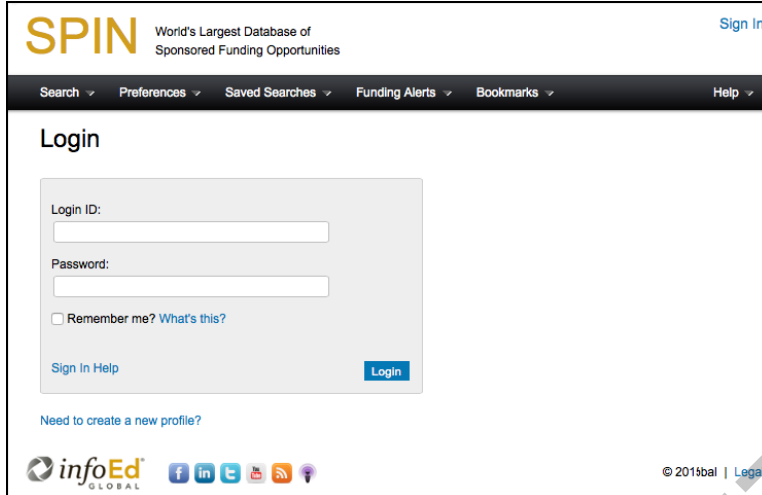


Figure 1: Streamlined SPIN login screen.

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).

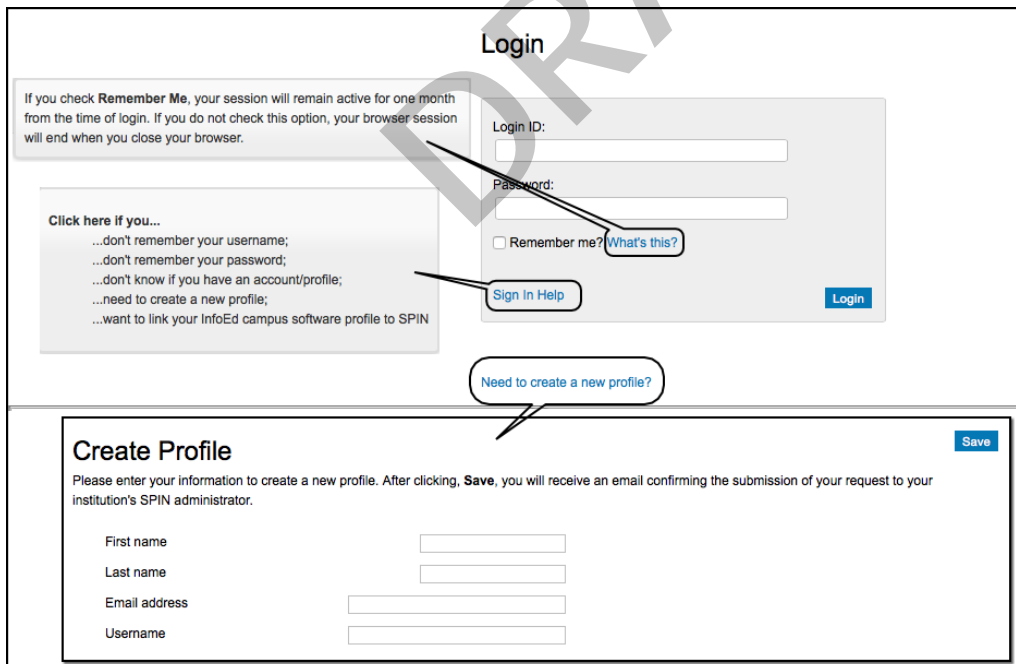


Figure 2: Sign In Screen help content.

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).

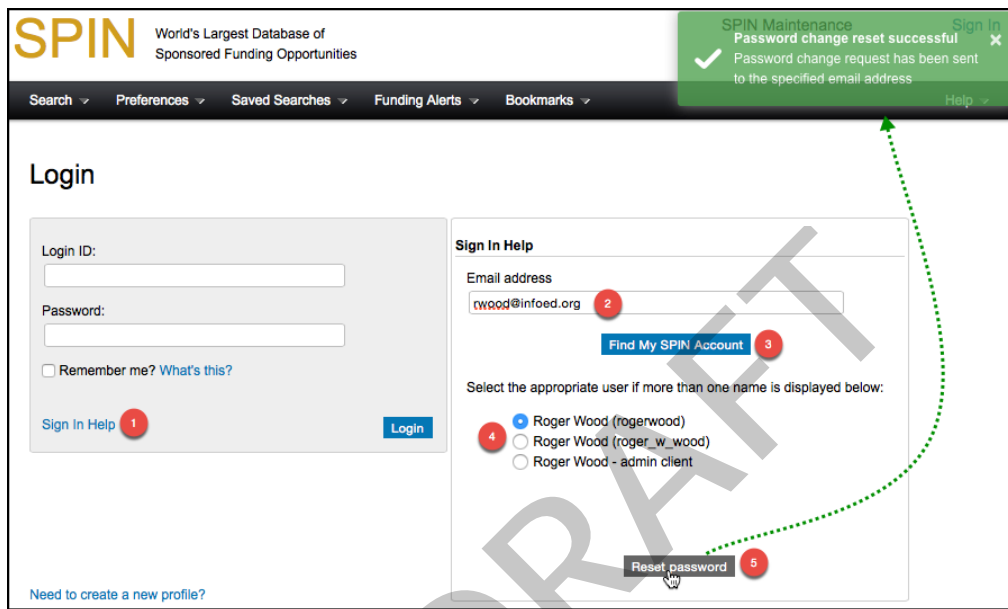


Figure 3: Sign in help

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.

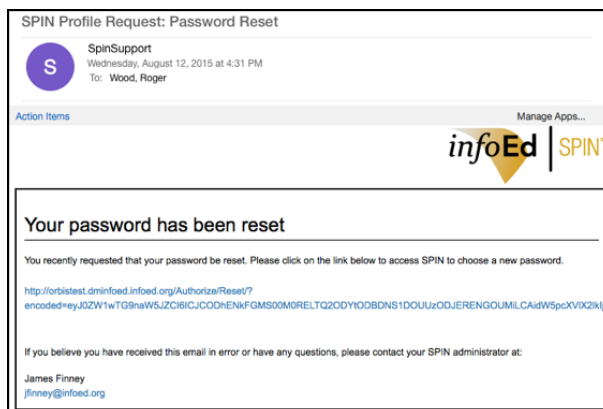


Figure 4: Password reset email example

Figure 5: Administrator username & password policy management

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).

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.

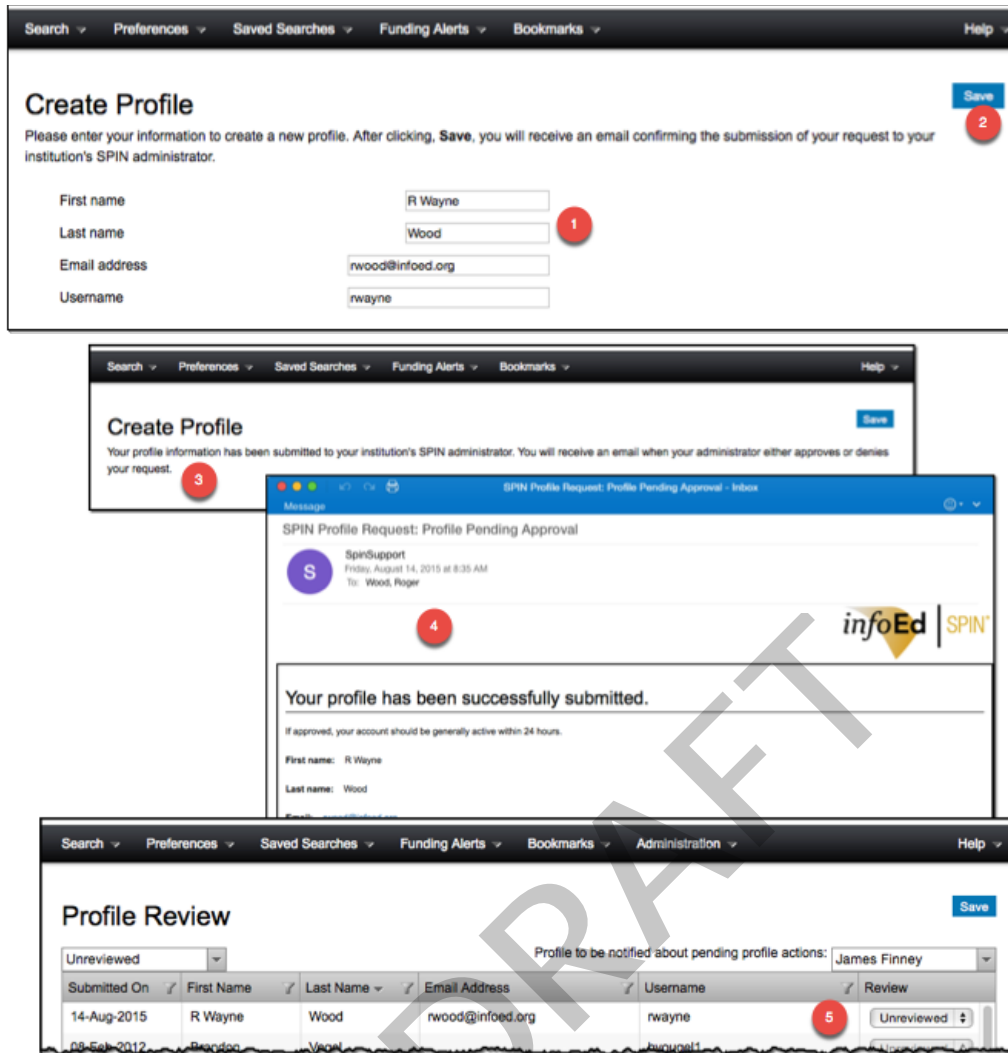


Figure 7: Profile request and approval process

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.

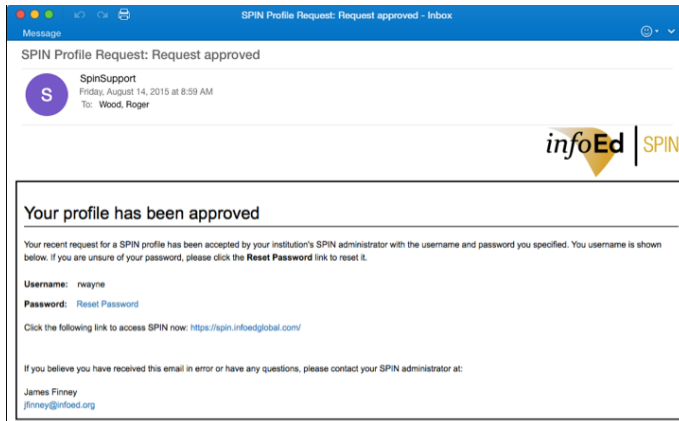


Figure 8: Profile approval email to user

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.

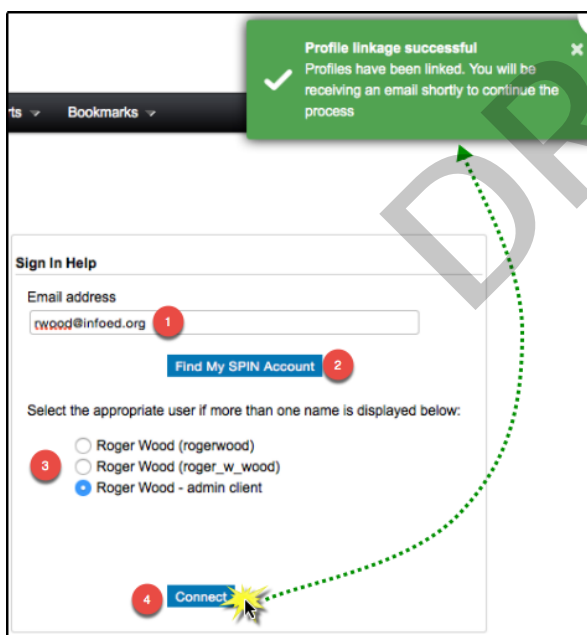


Figure 9: Enterprise client user profile linkage process

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.

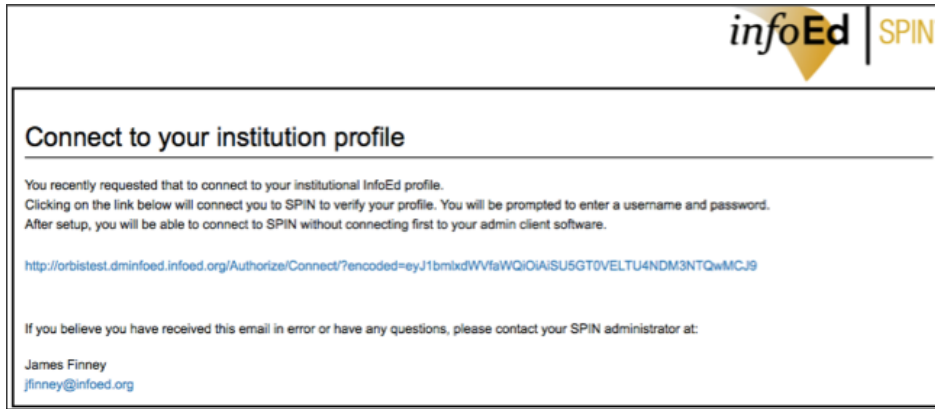


Figure 10: Enterprise client profile linkage confirmation email

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).