

SMARTS

PERSONLIZED EMAL ALERTS OF FUNDING OPPORTUNITY ANNOUNCEMENTS

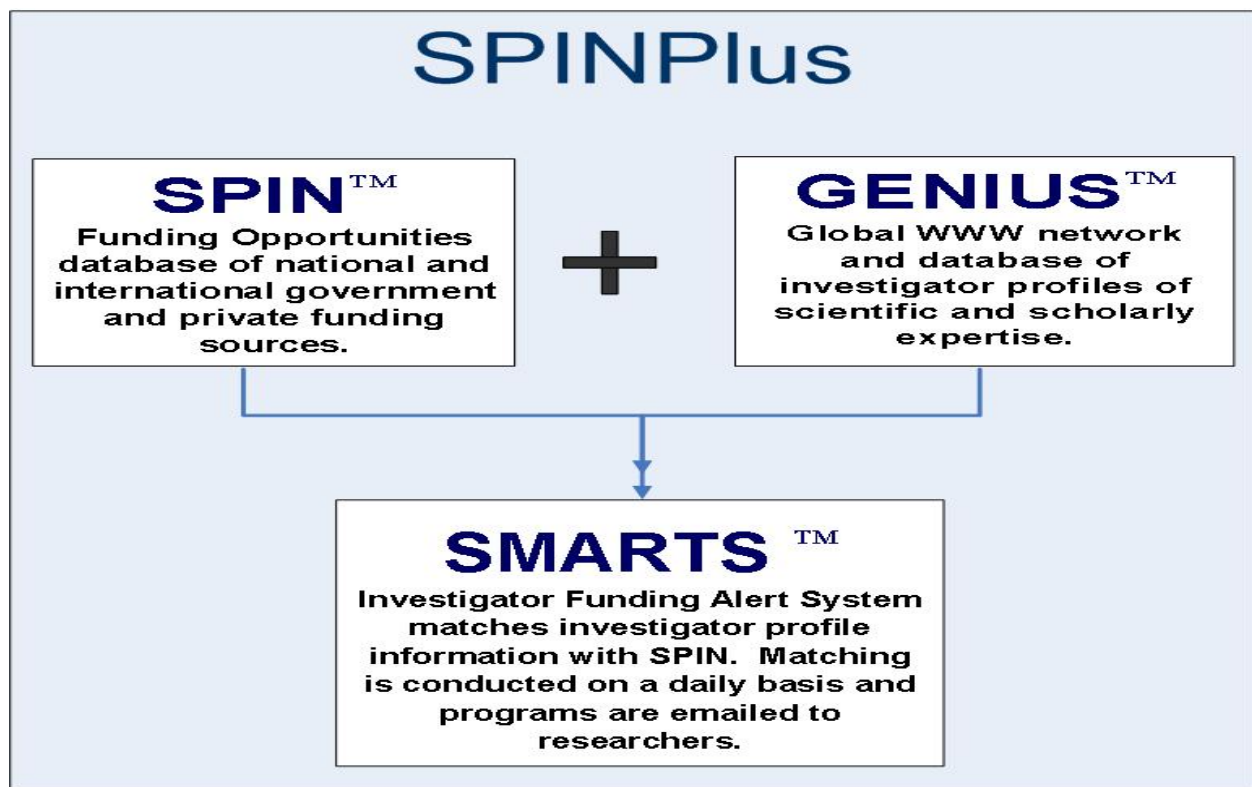
INTRODUCTION AND INSTRUCTION MANUAL Version 1.0 Created February 2009

By

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BACKGROUND

Investigators can setup custom, personalized alerts of Funding Opportunity Announcements (FOA) using the InfoEd's SPINPlus module. SPINPlus is a web-based system that includes a database of funding opportunities (Sponsored Programs Information Network (SPIN)), a database of investigator profiles (Global Expertise Network for Industry, Universities and Scholars (GENIUS)), and a matching alert service (SPIN Matching And Research Transmittal Service (SMARTS)) that matches a GENIUS profile with SPIN records (See Figure 1). Once setup, the alerts are emailed daily Tuesday – Saturday directly to the email address associated with the GENIUS profile. The system sends only alerts of new FOA that have not been already sent.



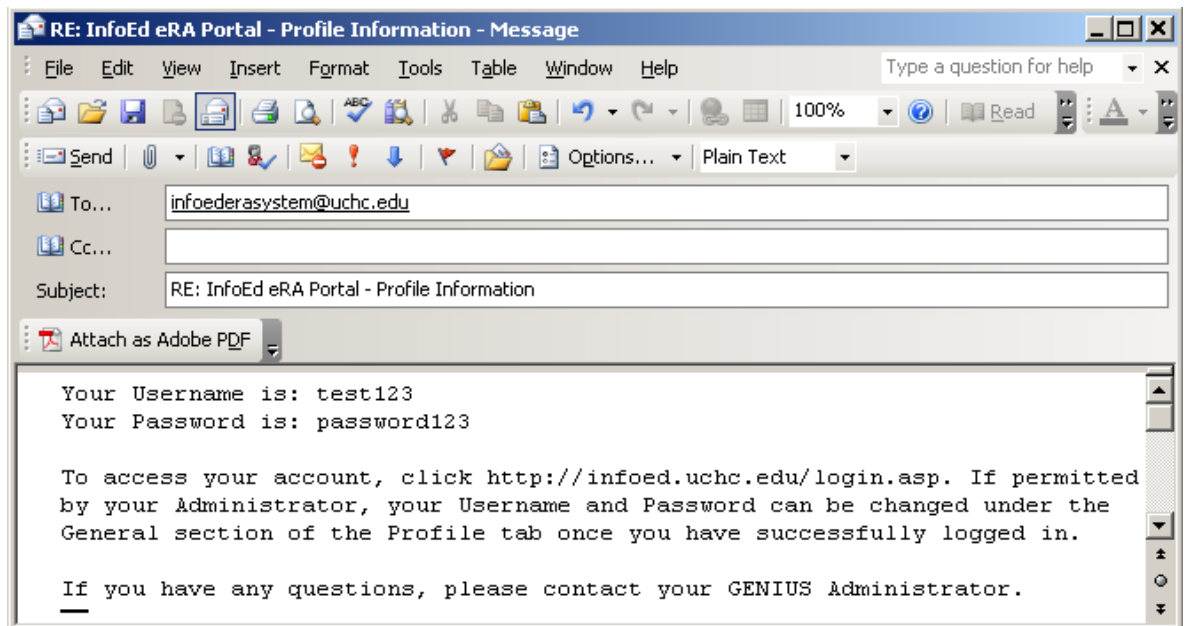
Because the UCHC subscribes to SPINPlus, the SPIN database on UCHC servers is updated nightly by InfoEd. So, you can rest assured that the alerts you receive are up-to-date.

The SPIN database is a funding opportunities database designed to provide up-to-date information on current funding opportunities, including: Fellowships, Research Grants, Publication Support, Sabbatical Support, RFAs (NIH Guide), Curriculum Development, Conference Support, RFPs (Commerce Business Daily), and more. It contains more than 2,500 sponsoring agencies, which together provide over 11,000 separate funding opportunities. SPIN includes federal, non-federal, and international sponsors. Some of the sponsors includes the National Institutes of Health, Centers for Disease Control and Prevention, National Science Foundation, National Endowment for the Humanities, Department of Education, American Heart Association, American Cancer Society, New York State Department of Health, Doris Duke Charitable Foundation, and Rockefeller Foundation

INSTRUCTIONS: GENIUS & SMARTS SETUP

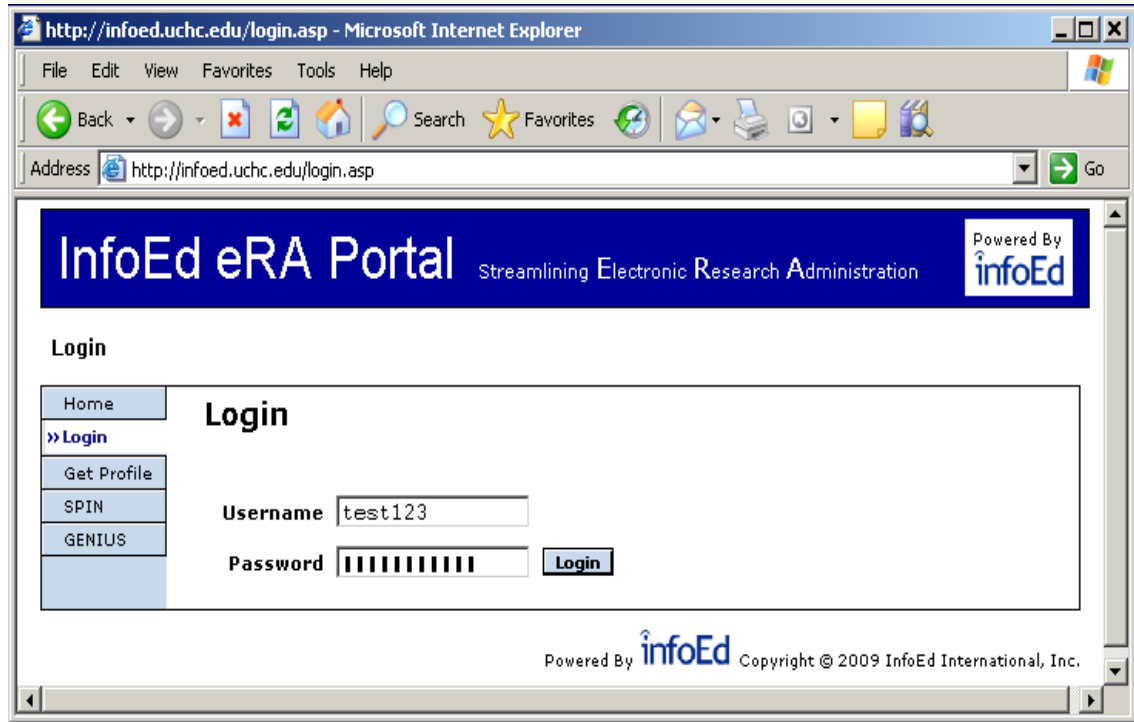
Step 1. Obtain an InfoEd account/profile (if you have an account, skip to Step 2)

1. Call David Fearey at 679-4941 or email him at fearey@adp.uchc.edu and be ready to supply the following information:
 - a. Your Name
 - b. Title/Role (PI, Dept. Admin, etc.)
 - c. Email
 - d. Telephone Number
2. Once an account/profile has been created, you will receive an email notification with the URL, username, and password (see screenshot for a test account).



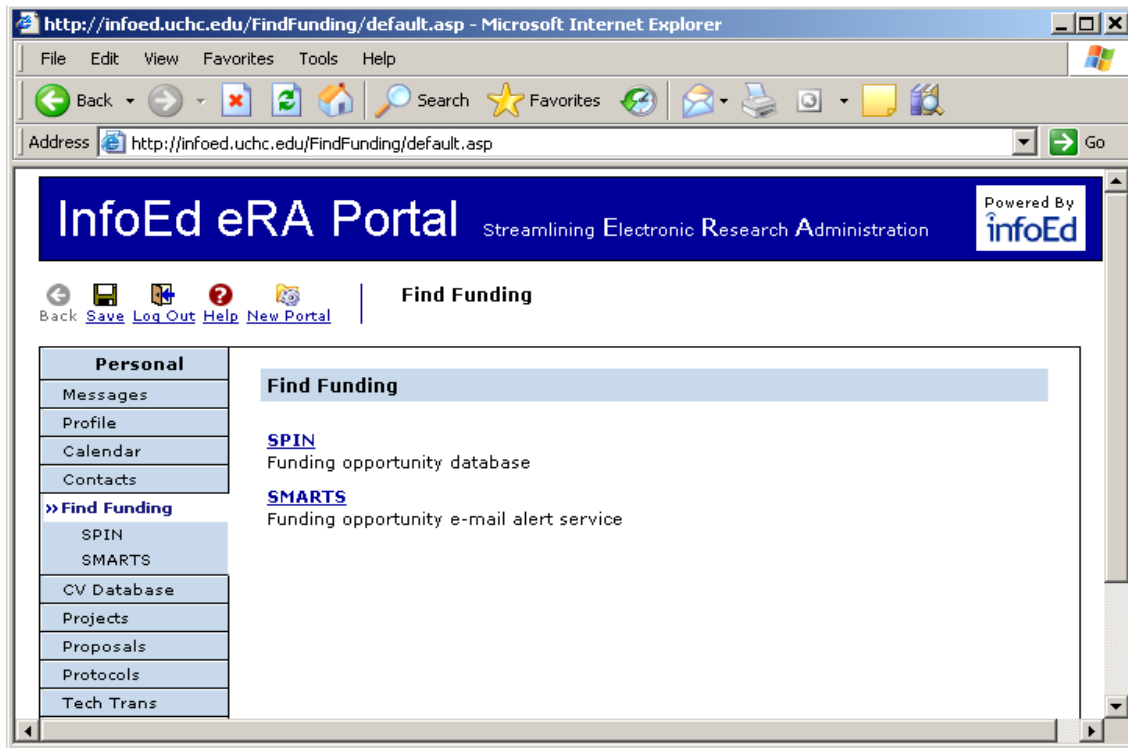
Step 2. Login

1. Point your browser to the url: <http://infoed.uchc.edu>
2. Press the Login control on the left and enter your username and password (see screenshot):

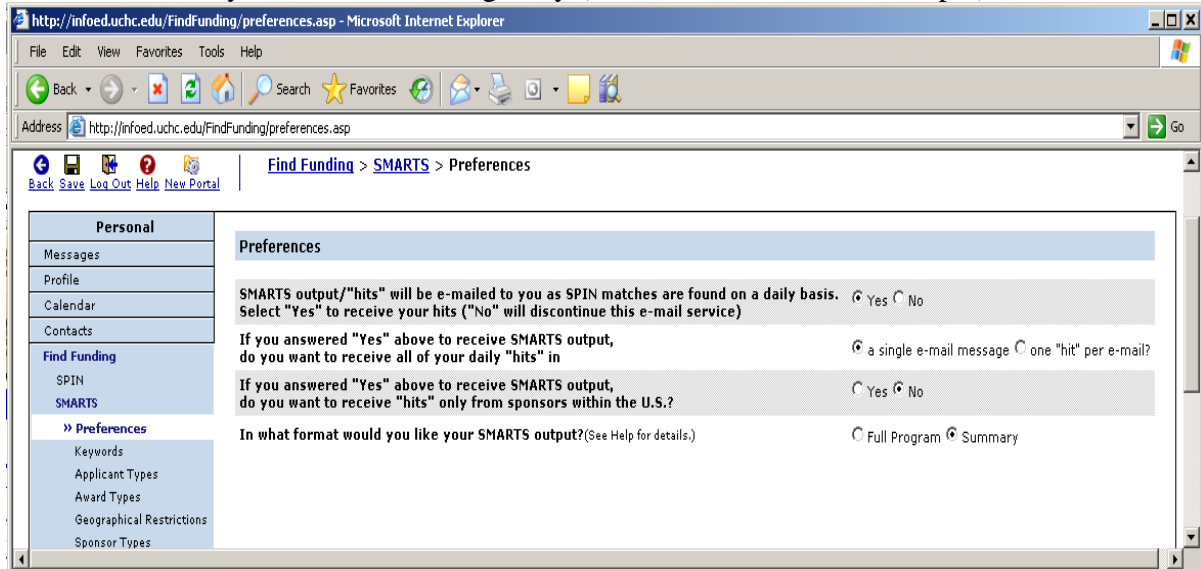


Step 3. Setup your personalized alerts in SMARTS

1. Once logged in, click the buttons “Find Funding”, then “SMARTS”:



2. Under “Preferences”, you can enable/disable daily email alerts, and configure the format of the emails you will be receiving daily (see Screenshot for an example).



NOTE: IF YOU MAKE ANY CHANGES, PLEASE MAKE SURE TO SAVE THEM BY CLICKING THE SAVE ICON IN THE UPPER LEFT CORNER



3. **Keywords.** Press Keywords (in the left pane), enter keywords to match funding announcements on. To browse and select any of the standard keywords in SMARTS, type a word in the Search box and press “GO.” In the screenshot below, we typed computer.

| | |
|---------------------------|-----------------|
| Personal | Keywords |
| Messages | |
| Profile | |
| Calendar | |
| Contacts | |
| Find Funding | |
| SPIN | |
| SMARTS | |
| Preferences | |
| » Keywords | |
| Applicant Types | |
| Award Types | |
| Geographical Restrictions | |
| Sponsor Types | |
| Locations Tenable | |
| CV Database | |
| Projects | |
| Proposals | |
| Protocols | |
| Tech Trans | |
| Help | |
| Administration | |
| | |

0 - 9 [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

No Records Found.
Select

How would you like your SMARTS Keywords to match?
 Exact Hierarchical

Selected Keywords
Remove

None

- [Agriculture](#)
- [Education](#)
- [Energy](#)
- [Engineering](#)
- [Geographical](#)
- [Humanities](#)
- [Law](#)
- [Management and Commerce](#)
- [Medicine](#)
- [Other](#)
- [Science and Technology](#)
- [Social Sciences](#)

All matching keywords/phrases will be displayed in the box just above the search box. The screenshot is the result of typing computer and pressing “GO.” You will notice that all entries have the word computer in them.

| | |
|---|-----------------|
| InfoEd eRA Portal Streamlining Electronic Research Administration Powered By infoEd | |
| Back Save Log Out Help New Portal Find Funding > SMARTS > Keywords | |
| Personal | Keywords |
| Messages | |
| Profile | |
| Calendar | |
| Contacts | |
| Find Funding | |
| SPIN | |
| SMARTS | |
| Preferences | |
| » Keywords | |
| Applicant Types | |
| Award Types | |
| Geographical Restrictions | |
| Sponsor Types | |
| Locations Tenable | |
| CV Database | |
| Projects | |
| Proposals | |
| Protocols | |
| Tech Trans | |
| Help | |
| Administration | |
| | |

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Analog Computers/Computing
 Computer Applications
 Computer Architecture
 Computer Arts
 Computer Education/Literacy
 Computer Engineering
 Computer Graphics
 Computer Hardware
 Computer Interface
 Computer Modeling

Select

How would you like your SMARTS Keywords to match?
 Exact Hierarchical

Selected Keywords
Remove

None

- [Agriculture](#)
- [Education](#)
- [Energy](#)
- [Engineering](#)
- [Geographical](#)
- [Humanities](#)
- [Law](#)
- [Management and Commerce](#)
- [Medicine](#)
- [Other](#)
- [Science and Technology](#)
- [Social Sciences](#)

To add any of these words/phrases to your alert keywords, select the key word/phrase and press “Select.” To select multiple words simultaneously, click your mouse on all entries while pressing down the “CTRL” key on your keyboard. The entry selected will now appear at the bottom of the page under the title “Selected Keywords.”

InfoEd eRA Portal Streamlining Electronic Research Administration Powered By infoEd

Back Save Log Out Help New Portal | Find Funding > SMARTS > Keywords

| |
|---------------------------|
| Personal |
| Messages |
| Profile |
| Calendar |
| Contacts |
| Find Funding |
| SPIN |
| SMARTS |
| Preferences |
| Keywords |
| Applicant Types |
| Award Types |
| Geographical Restrictions |
| Sponsor Types |
| Locations Tenable |
| CV Database |
| Projects |
| Proposals |
| Protocols |
| Tech Trans |
| Help |
| Administration |

Keywords

0 - 9 [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

| | | |
|-----------------------------|--------|--|
| Analog Computers/Computing | Select | <input type="checkbox"/> Agriculture |
| Computer Applications | | <input type="checkbox"/> Education |
| Computer Arts | | <input type="checkbox"/> Energy |
| Computer Education/Literacy | | <input type="checkbox"/> Engineering |
| Computer Engineering | | <input type="checkbox"/> Geographical |
| Computer Graphics | | <input type="checkbox"/> Humanities |
| Computer Hardware | | <input type="checkbox"/> Law |
| Computer Interface | | <input type="checkbox"/> Management and Commerce |
| Computer Modeling | | <input type="checkbox"/> Medicine |
| Computer Music | | <input type="checkbox"/> Other |
| | | <input type="checkbox"/> Science and Technology |
| | | <input type="checkbox"/> Social Sciences |

Search

How would you like your SMARTS Keywords to match?
 Exact Hierarchical

Selected Keywords

All

Computer Architecture

Supercomputers

To remove any of the entries from the keyword search, check off the checkbox next to the entry you want removed and press “Remove.”

NOTE: PLEASE MAKE SURE TO SAVE YOUR CHANGES BEFORE CLSOING THIS KEYWORDS DIALOGUE BOX

- Applicant Type.** Press Application Type (in the left pane) and check off all the applicant categories that you’re interested in receiving the alerts for (see screenshot for an example)

InfoEd eRA Portal Streamlining Electronic Research Administration Powered By infoEd

Back Save Log Out Help New Portal | Find Funding > SMARTS > Applicant Types

| |
|---------------------------|
| Personal |
| Messages |
| Profile |
| Calendar |
| Contacts |
| Find Funding |
| SPIN |
| SMARTS |
| Preferences |
| Keywords |
| Applicant Types |
| Award Types |
| Geographical Restrictions |
| Sponsor Types |
| Locations Tenable |
| CV Database |

Applicant Types

Select all criteria that applies to you

| | | |
|---|---|---|
| <input type="checkbox"/> Individual, Non-Specific | <input type="checkbox"/> Librarian/Library Professional | <input checked="" type="checkbox"/> Researcher/Investigator |
| <input type="checkbox"/> Artist/Writer/Etc. | <input type="checkbox"/> Minority Individual | <input type="checkbox"/> Graduate Student |
| <input type="checkbox"/> Doctoral-Midcareer/Senior Invst. | <input type="checkbox"/> Nurse | <input type="checkbox"/> Small Business |
| <input checked="" type="checkbox"/> Faculty Member | <input type="checkbox"/> Physician/Medical Professional | <input type="checkbox"/> Undergraduate Student |
| <input type="checkbox"/> Higher Ed. Administrators/Staff | <input type="checkbox"/> Predoctoral-Non-Student | <input type="checkbox"/> Woman |
| <input type="checkbox"/> Handicapped | <input type="checkbox"/> Precollegiate Educator/Personnel | <input type="checkbox"/> Young Investigator/Junior Faculty |

Institutional Applicant Types (Selected by your GENIUS/SMARTS administrator to be used in SMARTS Matching)

College, 2-year

College, 4-year

- Award Type.** Unless you want to restrict the type of awards, don’t check off any of the entries. The system will use “ALL” in SMARTS matching.

6. **Geographical Restrictions.** Unless you want to restrict the region/location, don't check off any of the entries. The system will use "ALL" in SMARTS matching.
7. **Sponsor Types.** Unless you restrict the type of sponsor, don't check off any of the entries. The system will use "ALL" in SMARTS matching.
8. **Location Tenable.** Unless you restrict the regions/countries where you want to carry out your research project, don't check off any of the entries. The system will use "ALL" in SMARTS matching.

REMINDER: IF YOU MAKE ANY CHANGES, PLEASE MAKE SURE TO SAVE !

THAT'S YOU DONE! Wait for the alerts to start arriving at your email inbox daily, starting tomorrow (see Figure 2 for an example email alert). Please contact David Fearey (679-4941 or fearey@adp.uchc.edu) if you have any questions or concerns. Good Luck!

Figure 2 – Example Email Alert

