


## Overview

SMARTS is an electronic matching and funding opportunities notification system which provides investigators with a direct and targeted electronic link to comprehensive, currently available research funding information – both national and international. The investigator profile information is collected via forms in Find Funding and used for matching with the SPIN database. Matching is conducted on a daily basis and results are automatically e-mailed to individual researchers. It is important to review the PennERA Profile information for accuracy.

SPIN is an extensive, searchable database of funding opportunities, including federal, non-federal, and private sources. SPIN is updated daily with data obtained directly from the funding sources. All search criteria can be saved, and new funding opportunities can be e-mailed directly to investigators when they become available.

## Using SMARTS Matching

1. Login to PennERA using your PennKey and password. <https://www.pennera.upenn.edu/LogIn.asp> or from login link at <https://www.pennera.upenn.edu/>
2. Check that your e-mail address is correct in your profile by clicking on **My Profile** and **Edit** located on the left side of the screen.
  - Click on the  icon to unlock text for editing.
3. Select the **SMARTS** link in **My Profile** .
  - SMARTS can also be accessed from the **SPIN Search** screen by selecting **Funding Alerts** at the top of that screen.
4. The **Preferences** screen will be displayed first. Answer the four questions that control how to receive SMARTS matches.
5. Select each item from the list on the right side of the screen to make alert choices:
  - **Keywords**
  - **Applicant Types**
  - **Award Types**
  - **Geographical Restrictions**
  - **Sponsor Types**
  - **Locations Tenable**
6. Save the alert preferences by clicking on **Save** at the top right.

SMARTS

Save


**Note:** Selecting too many fields may narrow search results too much; however, a too broadly defined search may return an extremely large e-mail message that will take a long time to open.

7. Automatic alerts of funding opportunities that match the selected criteria will be e-mailed on a daily basis.

## Accessing SPIN

Login to PennERA with your PennKey and password.

### Quick SPIN search

1. Select the  **Find Funding** icon at the top of the screen. The **SPIN Search** screen will open.
2. Type the word(s) for which you want to search in the **Search** field.
3. Select **Search** options – **Full Program, Titles Only, or Sponsor Program No.**
4. Select the number of results to be displayed per page.
5. Choose to match **All Words, Any Words, or Exact Phrase.**
6. Click **Search** . The **SPIN Search Results** page will be displayed.
7. Use the Search Results to:
  - Click the provided link for a full program listing.
  - Build a report based on results.

### To build a results report:

1. Select opportunities to include in the report: A checkbox appears to the right of each listed opportunity.
2. In the **Report** section below the search results, choose the desired **Report Options**.
3. Click **Build** to create the report.
4. Use the browser's Print function to print the report.
5. Alternatively, the report can be saved as a file to a local drive.

### Advanced SPIN Search

1. Click **Advanced Search** on the **Search** screen to display the **Advanced Search** screen.
2. To define your search, select categories that will refine the results.
  - Click the **show** link next to each category section to display search options.
    - ◇ **My Funding Opportunity Interests**
    - ◇ **Funding Opportunity Text Search**
    - ◇ **Funding Opportunity Sponsor Search**
    - ◇ **Additional Funding Opportunity Information**
  - Click on the links in **blue** to display drop-down menus to select values or type keywords into free text fields.
- Note:** Selecting too many fields may narrow search results too much.
3. Choose the sort order for the results from the **Primary** and **Secondary Sort** drop-down lists.
4. Select the number of results per page to view from the **Return Results** drop-down list.
5. Click **Run** at the top of the screen.

Delete Items Clear Run Load Save Edit Profile

6. The **SPIN Search Results** page will display the search results.
7. Build a results report.

Need assistance? Please contact the PennERA Help Desk by e-mail at [pennerahelp@lists.upenn.edu](mailto:pennerahelp@lists.upenn.edu).