



GRANTS OFFICE

Navigating UPstream® Interactive Grants Intelligence

*User Guide to the Grants Office UPstream® Online Knowledge Base,
including tips and hints to maximize usage.*

Grants Office LLC

www.grantsoffice.com

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About Grants Office LLC

Grants Office, LLC is a national grants development services firm headquartered in Rochester, New York. Grants Office offers a range of grants-related services for municipalities, nonprofits, and industry partners. Grants Office's team of experienced, dedicated grants professionals can help you better understand grant funding and what it takes to succeed. You can learn more about Grants Office and our services at www.grantsoffice.com or call us at (585) 473-1430.



Introduction

Dozens of new grants become available every day, from a variety of different sources. Many of them hold the potential for providing you with the funding you need. The challenge is staying on top of all the information—without drowning in it.

Grants Office has developed the solution. It's called UPstream®, and it can help anyone who works with grants—whether you're planning to apply for your very first grant or you're a seasoned professional—to get much better results in far less time.

UPstream® is a tool that gives you daily updates on all the grants that are available. Typically, 15 to 40 new grants become available every day. UPstream® lets you track them, giving you detailed information to help you determine if each grant could be right for you.

UPstream® goes beyond simply tracking the mountains of data relating to grants. Its features help you to manage that information in ways that dramatically increase its relevance and effectiveness.

FIND. UPstream® gives you advanced search functions. Suppose you are only interested in firefighting grants, or school safety, or mental health. UPstream® lets you narrow down your search so you only see the grants that are relevant to you. Browse by keyword or deadline, or use our Advanced Search function to zero in on the grants that meet your exact needs.

REPORT. When it's time to create a report, UPstream® makes it easy. With its shopping cart-style interface, you simply select the grants that you are interested in, add them to your research report, and select "View Report." UPstream® compiles a report that can be opened in your word-processing software or emailed to other members of your team. You can also continue searching and selecting, and UPstream® will store all of the selections you make throughout your session.

PLAN. UPstream® doesn't just tell you about the grants that are available today. It gives you information on the latest developments at the legislative and program levels. This feature gives you the ability to plan and forecast for opportunities many months before they become officially available. Add grants to your watch list for easy access and tracking of your grants development activities.

Getting Started

After you sign up for your UPstream® subscription, you will receive a username and password from Grants Office. To sign in, go to <http://upstream.grantsoffice.com>, enter your username and password, and click Log In. If you experience any problems with your login information, call (585) 473-1430, option 2, or email helpdesk@grantsoffice.com

Account Login

Username:

Password:

☐ Remember Login

[Register](#) [Retrieve Password](#)



Create Your Search Profile

Setting up your unique user profile will assist you in finding grants that are most relevant to your needs. Under your profile, you can specify grant categories and geographic locations to limit your search results to information that is most relevant to you. These settings can be changed at any time, and can be turned off for any particular search. Search preferences are off by default and can be turned on at any time. To begin setting up your preferences, click on your name at the top of the page. Some of these settings you may remember from when you signed up, however, once you are a member you can adjust things at a much more granular level.

Geo Preferences

If you work in a specific geographic location, you might want to select geographic preferences to limit your search results to grants relevant to your area. These results will include both nationwide programs and programs available only to organizations in your location.

To set your geo preferences:

1. Click on your name at the top of any page.
2. Click on the Geography Preferences tab.
3. Under Geo Preferences, select checkboxes next to the Counties, States, or Provinces that you are interested in.
4. Click Save Geographic Preferences.

To clear these preferences at any time, complete steps 1-3 and click on Clear Geographic Preferences.

Category Preferences

To filter your grant searches according to category, you can select category preferences. You might want to set these preferences if you work with a particular sector, or a particular type of project or product. Search preferences are off by default and can be turned on at any time.

To set your category preferences:

1. Click on your name at the top of any page.
2. Click on The Category Preferences tab.
3. Under Category Preferences, click any of the category checkboxes to select the categories that best suit your use.
4. Once you have finished with all categories, click on the Save Category Preferences button to save your selections.

Weekly Update Emails are sent out every Friday and are based on your preferences and Watchlist. Be sure to opt in to emails under the Contact Information section of your Profile, and verify that your contact information is current. This setting is automatically chosen for you when you sign up however, you may opt out at any time.



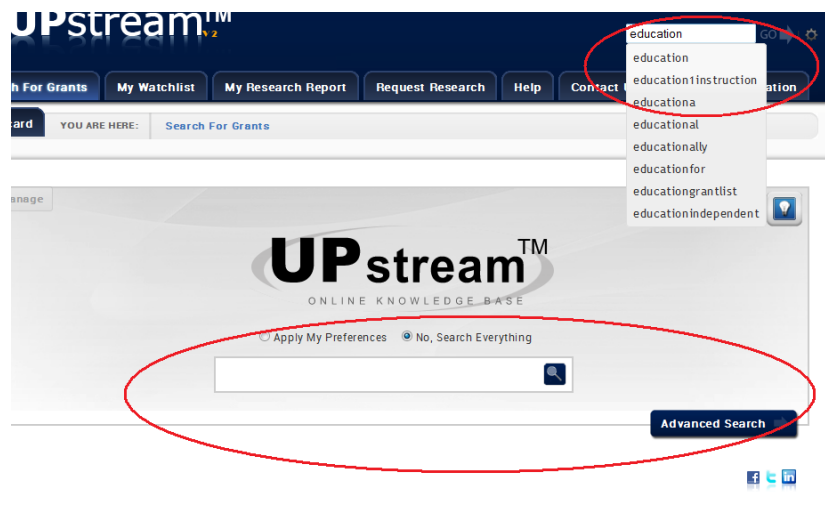
Find

UPstream® contains thousands of grant programs. To help you find exactly what you're looking for, UPstream® has a variety of search methods at your disposal.

Basic Search

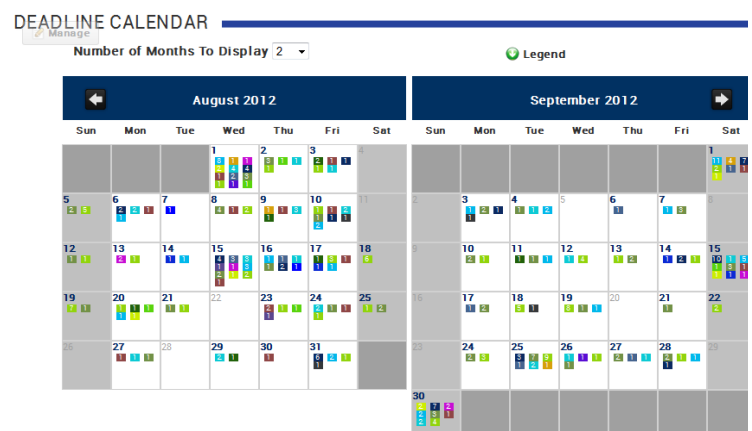
If you know the title of the grant program you're looking for, simply type it into one of the Basic Search bars. On the Home page, the Basic Search bar can be found in two places—in the middle of the page under "UPstream" and at the top right of the page. The top right Basic Search bar will be visible on all pages.

The Basic Search tool automatically detects frequently searched terms for your convenience, so the more you enter the better your results. Click on the Search button next to the box to pull up your results.



Browse By Deadline Calendar

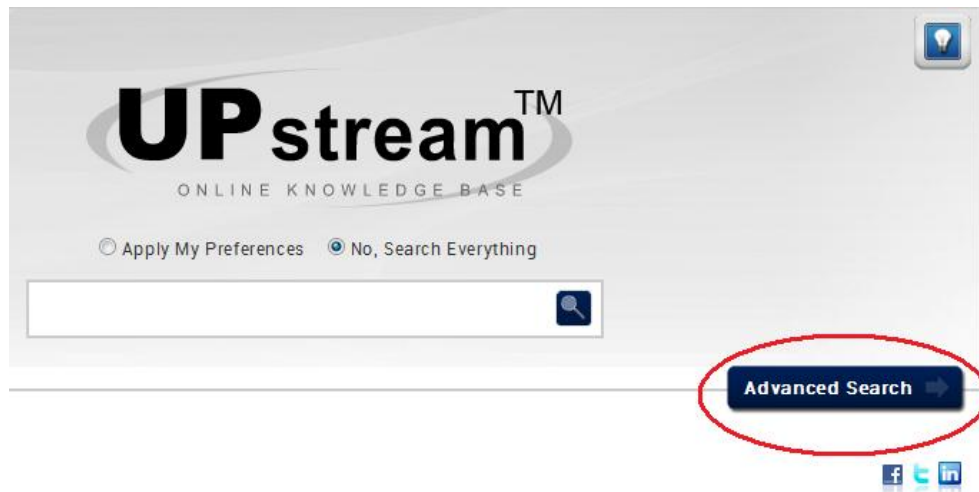
With the ease of a calendar format you can browse grants by deadline. This makes it possible to find deadlines on any date of any month. To use this feature, simply click on "Browse by Deadline" on the grey toolbar at the top of the page and click on the date to see which grants are due that day.





Advanced Search

The Basic Search can be a useful tool if you have previously discovered the grant program for which you're looking and need to find it quickly. However, if you are beginning your grants search and need to find all programs related to a specific initiative, eligibility type, location or deadline date range, the Advanced Search tool will be your best friend. First, go to the Advanced Search page, which can be found by clicking the Advanced Search link on the home page.



You have several options when searching with the Advanced Search tool.

- **Grant Title.** To search by Grant Title, enter your search term in the appropriate box and click Search at the bottom left of the page. Similar to the Basic Search, this function will limit your results to grants that have your search term in the actual program title.
- **Keyword.** To search by Keyword, enter your search terms in the Keyword box and click Search.
- **Grants Office ID.** If you know the Grants Office ID # for a particular grant, simply enter the number in the Grants Office ID box and click search to be taken directly to that posting.
- **Specific Deadline(s).** If you know the deadline of a particular grant program but need further details, such as the program's official title, eligibility requirements, etc., enter the date in the Deadline Date Range "Start" box and click Search. If you are not sure of the deadline, you can select multiple dates and enter the range in these boxes.



- **Expiration Date Range.** You may want to know when a grant is going to expire. Using the advanced search you can choose an expiration date range to see grants that will expire in a given date range.
- **Current/Expired Grants.** You may opt to include only current grant programs, only expired grants or both current and expired, depending on what type of information you are seeking. The Current Grants setting is the default.
- **Preferences On or Off.** You may opt whether or not to search with your preferences as parameters.

These functions may be used independently or in conjunction, depending on the type of search you are running. Review the following tips and hints to learn more about each search option.

Search Tips & Hints

- For best results, enter only relevant search terms. Do not enter punctuation.
- Enter any eligibility terms in the Keyword field. For instance, if you are looking for grants for libraries, enter "libraries" in the Keyword field to pull up all grants that mention libraries. If you enter Library in the Grant Title field, you will exclude several programs that are available to libraries and other organizations.
- If you are searching for grants from a particular funding agency, enter the full name of the agency into the Keyword field. This search will pull up all programs related to that agency, even if the agency is listed in the Purpose for Funding section of the post and not the Authority section. If you want to find only grant programs funded by a particular agency, you can click on Authority in your results page to organize the grant results by funding agency.
- Make sure to use project-related search terms, rather than product-related terms. While many grant programs will fund technology purchases as a component of an overall project, very few grants exist solely to fund product purchases. You will miss many grant opportunities if you limit your searches to product terminology.
- Try a variety of searches. Grants are complex mechanisms, and it may take a few tries searching through the database to find all programs that might serve your purpose.
- If you want to focus on upcoming grants, you can search for grants with deadlines in a date range in the future. This function is particularly useful if you or your customers are applying for multiple programs because you can keep an eye on what is coming up next.
- If you hear of a grant with a particular deadline but are not aware of the grant's title or other pertinent information, you can search the database for grants with that deadline, and use your category preferences or search terms to pinpoint the exact program and find comprehensive details.
- If you find grants that you want to save, keep an eye on, or share, be sure to add them to your watchlist and/or download a research report to save to your desktop or email to others.



Report

Once you find grants that are of interest, you can easily download the full grant postings as a Word document you can print, save to your desktop, and share with others.

Create a Research Report

You can add grants to your research report through two different methods. If you want to add a program from your search results page, check the box to the left of the program that is a little sheet of paper. If you are looking at an individual grant posting, click Add to Research Report in the upper right corner



The programs you add to your research report will be saved for the duration of your UPstream® session. You have the ability to name and save your report at any time and it will be saved in a drop down at the top of the page. You are then able to "View Details," "Make Current," or delete at any report you have saved.

You can download the report at any time by clicking either Download Research Report above your search results. In View Reports you will also be able to reorder

grants to best suit your needs.

After downloading the report, your programs will still be saved and you can continue to add programs and download all of them as long as you are logged in. To clear your Research Report collection, simply log out or go to the View Reports page and clear your research report. Keep in mind that logging out of a session will clear your report, so you should download the report before logging off if you would like to keep a copy of the programs you selected.

Plan

In searching UPstream®, you may notice that many of the programs that are listed as Active have passed deadlines. The reason these programs are active is because they are annual grant programs that are expected to be released in the coming year. However, each year's program announcement may only be released by the funding agency 30-60 days before the grant application is due. By including last year's deadlines and program priorities, UPstream® provides you with insight into the coming year's solicitation, and makes it possible for you to prepare for a grant early and keep track of developments as they occur.

If you find a relevant grant that you want to keep an eye on, you can add it to your Watchlist, along with notes, next steps, and other application details. This function allows you to plan months in advance for important programs and stay on top of funding opportunities that have not yet been announced by the funding agency.



For industry clients, the Watchlist can be a vital tool that helps you track grant programs that could benefit your customers. Use your Watchlist to stay on top of program developments and notify customers when current NOFAs are released, deadlines are approaching, etc.

Build your Watchlist

MY WATCHLIST

Use your watchlist to keep track of grants through any part of the grant writing process.

15 grants in your **Research Report**

☒ All ☐ Active ☐ InActive

[Add to Research Report](#) [Update My Watchlist](#) [Remove Selected](#)

	Grant Title	Deadline(s)	Status Date	Progress
<input type="checkbox"/>	Energy Efficiency Development and Deployment in Indian Country	3/16/2011 12:00:00 AM	4/16/2012	<div></div>
<input type="checkbox"/>	State Homeland Security Grant Program (SHSP) (Michigan)	5/4/2012 12:00:00 AM	8/9/2012	<div></div>
<input type="checkbox"/>	Court Training and Improvements Program	4/11/2012 12:00:00 AM	8/9/2012	<div></div>
<input type="checkbox"/>	Teen Court Program (TCP)	5/30/2012 12:00:00 AM	8/9/2012	<div></div>

[f](#) [t](#) [in](#)

Adding programs to your Watchlist is similar to the process for adding programs to a research report—just select the little binoculars next to the title or click Add to Watchlist in the upper right corner of the grant page. Once you add a program, you may go to your Watchlist page to edit your entries.

You can add a variety of details to your selection by entering the status of the program (and what you are planning to do), the date that any status changes took place, and the amount of your funding request.

Teen Court Program (TCP) 5/30/2012 12:00:00 AM 8/9/2012

[Update Status](#)

☒ Active

Watching: 8/9/2012 Status Amount: \$

☐ Approved! ☐ Not Approved Status Amount: \$

Notes

*Watchlist Notes and Contacts apply to the full entry and are not for each individual status.

Refresh Editor

Key Contacts

Refresh Editor

You can also add notes to each program on your Watchlist to keep track of important planning details and steps in the grantseeking and application process. If you are a vendor, you can use this section to make notes on customers whom you are assisting with a particularly program, as well as any information you may need to provide as the application process continues.

Unlike the Research Report, programs added to your Watchlist will stay saved to your profile until you remove them.

Along with Watchlist, you are able to bookmark grants the same way you can bookmark a webpage. Directions vary by browser. If you are logged in, a bookmark will take you directly to the grant page and if you are not logged in, the bookmark will take you to the login page, then directly to the grant page.



Periodic Email Updates

Based on the current entries in your user created Watchlist in the Grants Office's UPstream® Online Knowledge Base, grants will be emailed to you in an easy to read list so you are aware of approaching deadlines. These Watchlist Deadline Reports will be sent to you 30 days and 14 days before the deadline.

UPstream™
Upcoming Watchlist Deadlines

6/23/2011
UPstream™ Watchlist Deadlines

Dear Jen,

Based on the current entries in your user created Watchlist in the Grants Office's UPstream™ Online Knowledge Base, the following grants have deadlines that are quickly approaching. Please login to UPstream™ to view the deadlines or click on the "View Post" link below. If you are no longer interested in a grant that is listed on your Watchlist, you can modify your Watchlist at any time at upstreamstaging.grantsoffice.com/Watchlist.aspx.

Prison Industry Enhancement Certification Technical Assistance Program
Next deadline is 7/7/2011
The program was created to encourage states and counties to establish employment opportunities for... [View Post](#)

Transformation Initiative: Sustainable Communities Research Grant Program (SCROP)
Next deadline is 7/7/2011
The purpose of the Transformation Initiative: Sustainable Communities Research Grant Program (SCROP)... [View Post](#)

Cancer Diagnostic and Therapeutic Agents Enabled by Nanotechnology (SBIR [U43/U44])
Next deadline is 7/7/2011
This program, issued by the National Cancer Institute (NCI), National Institutes of Health (NIH), in... [View Post](#)

If you have any questions please give us a call at (585) 473-1430 or email us at upstreamsubscriptions@grantsoffice.com.

If you no longer wish to receive emails about upcoming deadlines for grants on your Watchlist, click on upstreamstaging.grantsoffice.com/Watchlist.aspx (log into UPstream™ if necessary) and uncheck the "Active" checkbox next to the grant you no longer wish to receive emails about, then click the "Update" button for that row. If you wish to stop emails for all grants of your Watchlist, use the top "Active" checkboxes to de-select all and click the "Update My Watchlist" button in the upper right.

Sincerely,
Grants Office Team

GRANTS OFFICE

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Rochester, NY 14614

empowering communities

[Twitter](#) | [LinkedIn](#) | [Facebook](#)

Please Revoke Watchlist: This email and any files transmitted with it are confidential and intended only for the individual named. If you are not the named individual you should not disseminate, distribute or copy this e-mail. Please notify the sender immediately by e-mail if you have received this e-mail by mistake. If you are not the named individual you should not disseminate, distribute or copy this e-mail.

Weekly updates will be sent out every Friday based on your preferences and Watchlist. This allows you to see the most up to date grants every week. This setting is automatically chosen for you when you sign up however, you may opt out at any time.

UPstream™
Weekly Grant Updates

6/23/2011
UPstream™ Weekly Update

Dear Elyce,

Your Weekly Update of new grant opportunities from Grants Office's UPstream™ Online Knowledge Base can be found below. Based on your user-defined preferences (both Geographical and Categorical) we believe, the following grant opportunities may be of interest to you. You can modify your preferences at any time at upstreamstaging.grantsoffice.com/ModifyProfile.aspx.

SBE Doctoral Dissertation Research Improvement Grants
Next deadline is 8/16/2011
The National Science Foundation's Division of Behavioral and Cognitive Sciences (BCS), Division of S... [View Post](#)

The Target & BLUE Law Enforcement Grants
Next deadline is 8/1/2011
Target is committed to partnering with law enforcement and criminal justice organizations. Grants ar... [View Post](#)

If you have any questions please give us a call at (585) 473-1430 or email us at upstreamsubscriptions@grantsoffice.com.

If you no longer wish to receive your Weekly Update email, click on upstreamstaging.grantsoffice.com/ModifyProfile.aspx (log into UPstream™ if necessary) and uncheck the "Optin Preference" under "Email".

Sincerely,
Grants Office Team

For more assistance on utilizing your UPstream™ account, contact Grants Office at (585) 473-1430 or by emailing helpdesk@grantsoffice.com.