Quick Tips

How to Change the Proposal Template in Streamlyne

Two Streamlyne templates are available:

- The Standard/S2S template should be used for Grants.gov system-to-system (S2S) submission.

- All other proposals, including NSF Research.gov submissions, should use the abbreviated NonS2S template. For non-S2S submissions, all materials will be provided in the Sponsor's portal, and only a limited amount of information is required in Streamlyne.

How do I know if I have a Grants.gov submission?
- Grants.gov is the required submission portal for many federal agencies, including the NIH, DOE, HHS, Dept. of Education, AFRL, EPA, NEH, NEA.
- All other proposal submissions, including NSF, non-federal agencies, and subawards to UNM do not involve Grants.gov and should be completed using the "All Others" proposal template.
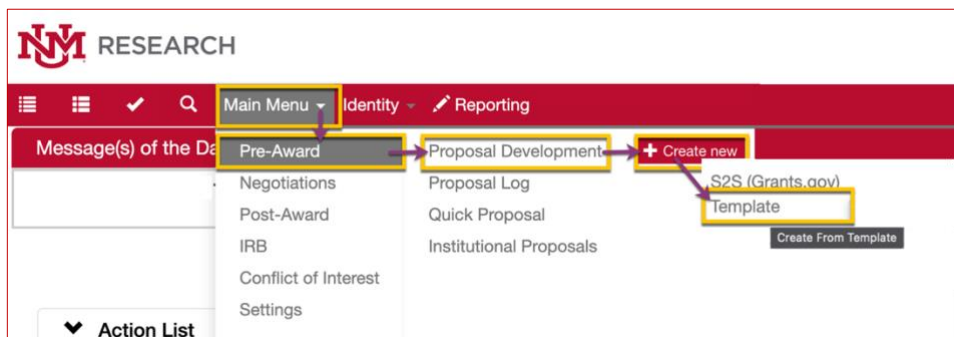
The template is typically chosen when creating a new proposal.

1. Navigate to Main Menu > **Pre-Award** > **Proposal Development** > **+ Create new**

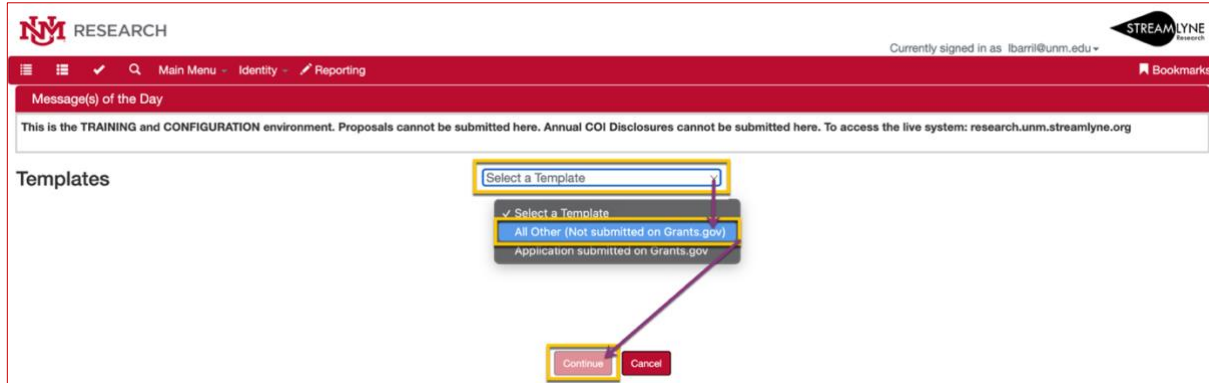   a. For Grants.gov S2S submissions, select **Standard/S2S**
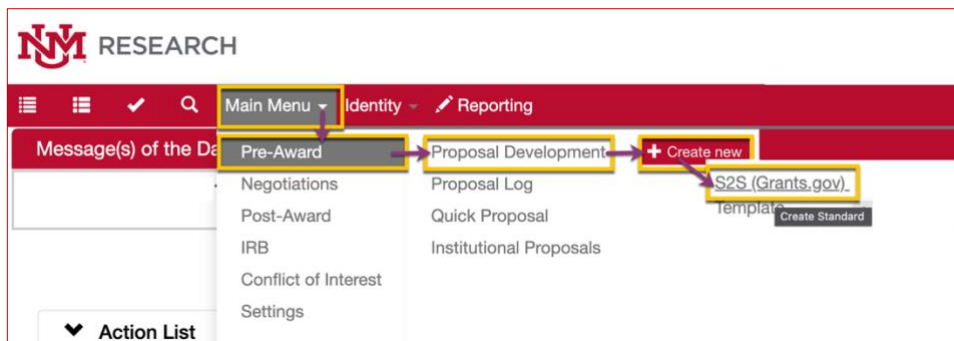
   b. For non-S2S submissions, select **Template**

Select **All Other (Not submitted on Grants.gov)** > **Continue**

2. If you accidentally begin in the wrong template, you can change templates within the proposal document. *The example images below illustrate a template change from All Other to S2S (Grants.gov).*

> **BEFORE** you change the template, if there are any documents in the **Proposal Attachments** panel, **MOVE** them to the **Internal Attachments** panel.
>
> If you don't do this first, you will not be able to access them once you change the template.

a. From the **Action List** in the Main Dashboard, select the **ID** number of the proposal you need to change to open it.
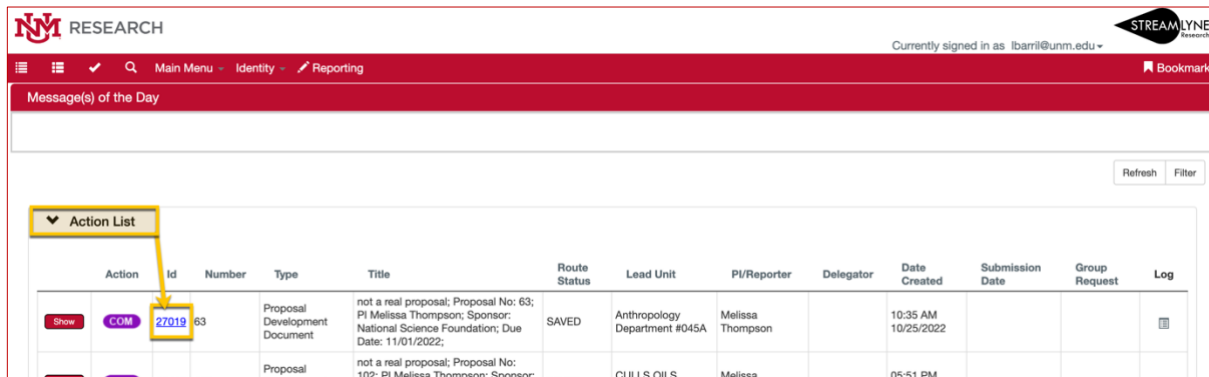

b. Navigate to the **Proposal** section and locate the last panel called **Document Template**.
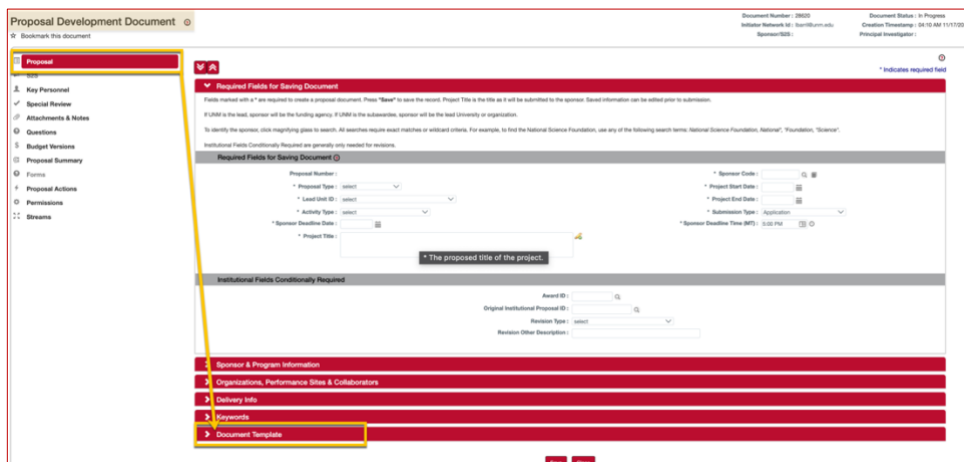
c. Click the magnifying glass next to **New Template Name**.

d. In the search window, do not enter search criteria. Just click **Search** button to view all available templates.

e. Click **return value** next to the desired template.
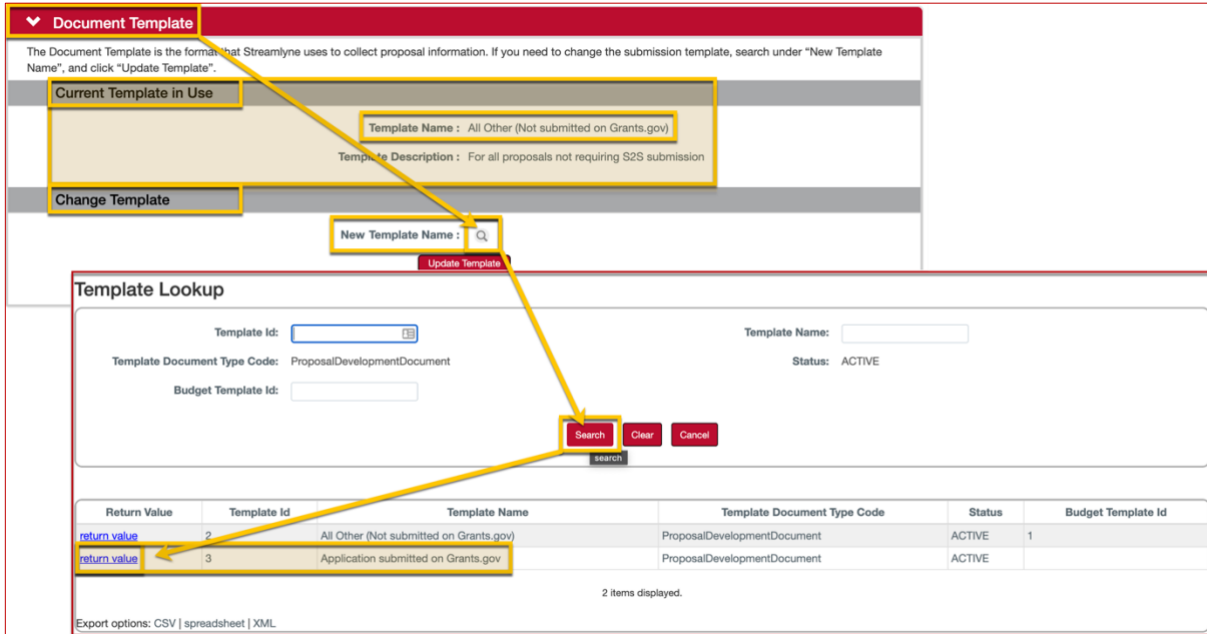
f. Click **Update Template** button to reformat the proposal document.
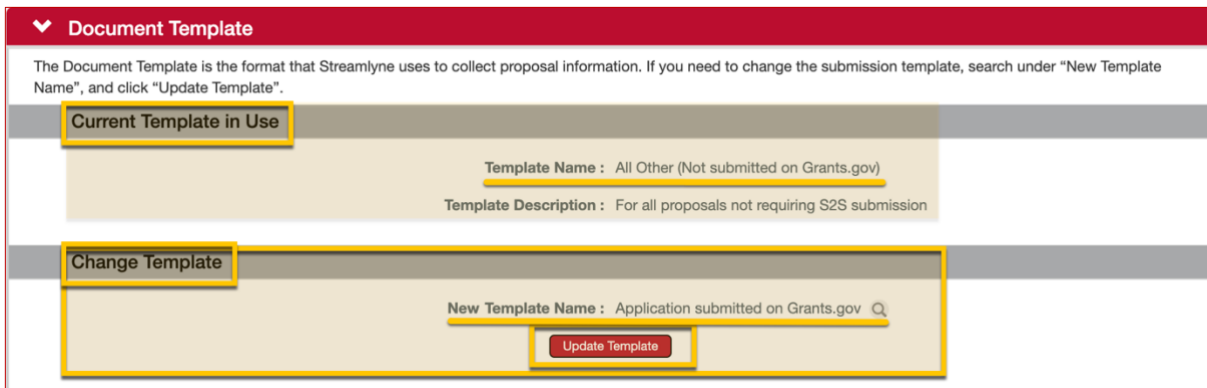
g. Because the templates require some different data, check the proposal carefully for missing information.

h. Because the templates use different budget tools, we recommend creating a new **Budget Version**.