



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**

Image: Second state standard Main Menu Identity Image: Second state standard Message(s) of the De Pre-Award Proposal Development Image: Second state standard Negotiations Proposal Log S2S (Grants.gov). Post-Award Quick Proposal Image: Second standard IRB Institutional Proposals Institutional Proposals		ł		
Negotiations Proposal Log S2S (Grants.gov) Post-Award Quick Proposal TempTate IRB Institutional Proposals	🔳 🔳 🖌 Q	Main Menu 👻 Identity	👻 🖍 Reporting	
Post-Award Quick Proposal Templat Create Standard IRB Institutional Proposals	Message(s) of the Da	Pre-Award	Proposal Development	+ Create new
Settings		Post-Award IRB Conflict of Interest	Quick Proposal	

b. For non-S2S submissions, select Template

	н		
🔳 🖌 २	Main Menu 👻 Identity	👻 🖍 Reporting	
Message(s) of the Da	Pre-Award	Proposal Development	+ Create new
1	Negotiations	Proposal Log	S2S (Grants.gov)
	Post-Award	Quick Proposal	Template
	IRB	Institutional Proposals	Create From Template
	Conflict of Interest		
	Settings		
✓ Action List			



Training Resources

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

RESEARCH	Currently signed in as Ibarril@unm.edu -
🔠 📰 🖌 Q. Main Menu - Identity - 🖍 Reporting	Reokmarks
Message(s) of the Day	
This is the TRAINING and CONFIGURATION environment. Proposals cannot be submi	tted here. Annual COI Disclosures cannot be submitted here. To access the live system: research.unm.streamlyne.org
Templates	Select a Template

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.

N RES	SEARC	Н								Currently sign	ned in as Ibarril@un		STREAM
:= ~	/ Q	Main M	lenu 👻 Iden	itity 👻 🖍 Report	ling								Bookr
lessage(s)	of the Da	ıy											
													Refresh Filt
✓ Action		-											
Activ	on List												
Aut	Action	Id	Number	Туре	Title	Route Status	Lead Unit	PI/Reporter	Delegator	Date Created	Submission Date	Group Request	Log
Show		Id 27019		Type Proposal Development Document	Title not a real proposal; Proposal No; 63; PI Malissa Thompson; Sponsor: National Science Foundation; Due Date: 11/0/2022;		Lead Unit Anthropology Department #045A	PI/Reporter Melissa Thompson	Delegator				Log

b. Navigate to the **Proposal** section and locate the last panel called **Document Template**.

Proposal Development Document		Document Number : 2850 Initiater Network Mr. Burrillourn.ndu Byanaur/1825 :	Document Status : In Progress Creation Timestamp : 04:10 AM 11/17/202 Principal Investigator :
* 828	**		Indicates required field
え Key Personnel	 Required Fields for Saving Document 		
Special Review	Fields marked with a * are required to create a proposal document. Press *Save* to save the record. Project Title is the 19		
Attachments & Notes	If UNM is the lead, sponsor will be the funding agency. If UNM is the subawardee, sponsor will be the lead University or or		
Questions	To identify the sponsor, click magnifying glass to search. All searches require exact matches or wildcard oriteria. For example, and the search search and the search search and the search search and the search and th	ple, to find the National Science Foundation, use any of the following search terms: National Science Foundation, National", "Foundation, "Science".	
S Budget Versions	Institutional Fields Conditionally Required are generally only needed for revisions.		
C Proposal Summary	Required Fields for Saving Document ()		
O Forms	Proposal Number :	* Sponsor Code : Qi 🗃	
⁶ Proposal Actions	* Proposal Type : select 🗸 🗸	* Project Start Date :	
O Permissions	* Lead Unit ID : select 🗸 🗸	* Project End Date :	
20 Streams	* Activity Type : select 🗸 🗸	* Submission Type : Application	
	* Sponsor Deadline Date :	* Sponsor Deadline Time (MT) : 5:00 PM 🗄 O	
	* The proposed title Institutional Fields Conditionally Required	of the project.	
		Award ID : Q	
	ori	pinal institutional Proposal ID : 0	
		Revision Type : select 🗸	
		Revision Other Description :	
	Sponsor & Program Information		
	Organizations, Performance Sites & Collaborators		
	Delivery Info		
	> Keywords		
	> Document Template		
		San Con	



- 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.

✤ Document Template			
The Document Template is the format that Streamlyne uses to collect proposal information. If you need to change the Name", and click "Update Template".	submission template, search under "New Template		
Current Template in Use			
Template Name : All Other (Not submitted on Gr Template Description : For all proposals not requiring :			
Change Template			
New Template Name : Q			
Template Lookup			
Template Id:	Template Name:		
Template Document Type Code: ProposalDevelopmentDocument	Status: ACTIVE		
Budget Template Id:	Clear Cancel		
Return Value Template Id Template Name	Template Document Type Code	Status	Budget Template Id
return value 2 All Other (Not submitted on Grants.gov)	ProposalDevelopmentDocument	ACTIVE	
return value 3 Application submitted on Grants.gov	ProposalDevelopmentDocument	ACTIVE	
	ns displayed.		
Export options: CSV spreadsheet XML			

f. Click Update Template button to reformat the proposal document.

ne Document Template is the format that Streame", and click "Update Template".	amlyne uses to collect proposal information. If you need to change the submission temp	late, search under "New Template
Current Template in Use		
	Template Name: All Other (Not submitted on Grants.gov)	
	Template Description : For all proposals not requiring S2S submission	
Change Template		
	New Template Name : Application submitted on Grants.gov Q	

- 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.