Quick Tips

How to Edit Proposal Permissions in Streamlyne

The following instructions will allow you to give access to another UNM user, such as a co-Investigator or administrative support staff, for a specific proposal.

**IMPORTANT!** To prevent conflicting changes, proposals are locked for editing when one user is working in the proposal. The proposal will remain locked for 24 hours unless that user clicks the red **Close** button that appears at the bottom of any page.

If you are collaborating with another user, be sure to **Close** the proposal. Navigating away or closing the browser window will NOT remove the proposal lock.

A user may remove their own lock at any time by re-entering the proposal and clicking **Close**. If this cannot be done, contact Office of Sponsored Projects (**osp@unm.edu**, 505-277-4186) to request that the lock be removed.

**Editing proposal permissions in Streamlyne**

1. Open the existing proposal document
   
   (See **Finding a previously-created proposal** in **Getting Started in Streamlyne** guide:  
   [https://streamlyne.unm.edu/resources/getting-started-in-streamlyne.pdf](https://streamlyne.unm.edu/resources/getting-started-in-streamlyne.pdf)

2. Navigate to the **Permissions** section.
3. The **Users** pane summarizes the Roles currently assigned and provides the ability to **Add** or **Delete** permissions or **Edit Roles**.

   - At least one person must be assigned to the Aggregator role.
   - The proposal initiator is automatically assigned the Aggregator role.
   - The PI/Contact may not be listed but will also have permissions equivalent to the Aggregator role.
   - Only UNM personnel may be assigned proposal permissions.
   - Permissions are applicable to proposals under development. Some proposal elements may be locked for editing once a proposal is routed.

![Proposal Development Document](image)

4. To **Add** permissions for a new person, locate the **Add**: search window and use it to find the individual’s **User Name** in the Person database:

   - If you know the UNM email address, type the full address (xxxx@unm.edu) in the search window and press Return. If a record is found, their information should appear below the search bar.
   - Alternatively, click the magnifying glass icon to open the **Person Lookup**. Enter the first and/or last name and click **Search** button (or press Return). If you are unsure of the spelling, you can use wildcard search, e.g., Stok*, to bring up all matches. Click **return value** next to the person you wish to add.
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5. Use the drop-down list to select a Role.
   - **Aggregator**: can edit all parts of the proposal
   - **Budget Creator**: can edit budgets but not proposal documents/attachments
   - **Narrative Writer**: can edit proposal documents/attachments, but not budgets
   - **Viewer**: can access all proposal and budget sections but cannot make edits

6. Click **Add** to finalize your selection.
7. To edit permissions, you may click **Delete** to remove all proposal access to a person or **Edit Role** to provide different levels of access.