



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.

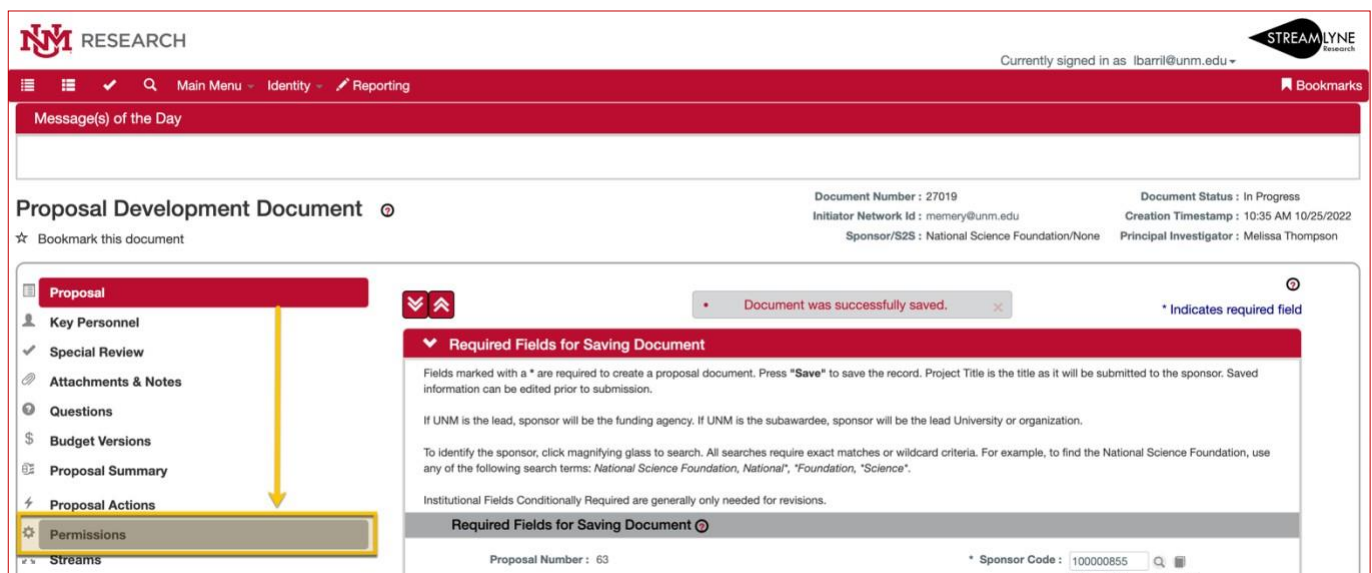
IMPORTANT! To prevent conflicting changes, proposals are locked for editing when one user is working in the proposal. The proposal will remain locked for 24 hours unless that user clicks the red **Close** button that appears at the bottom of any page.

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

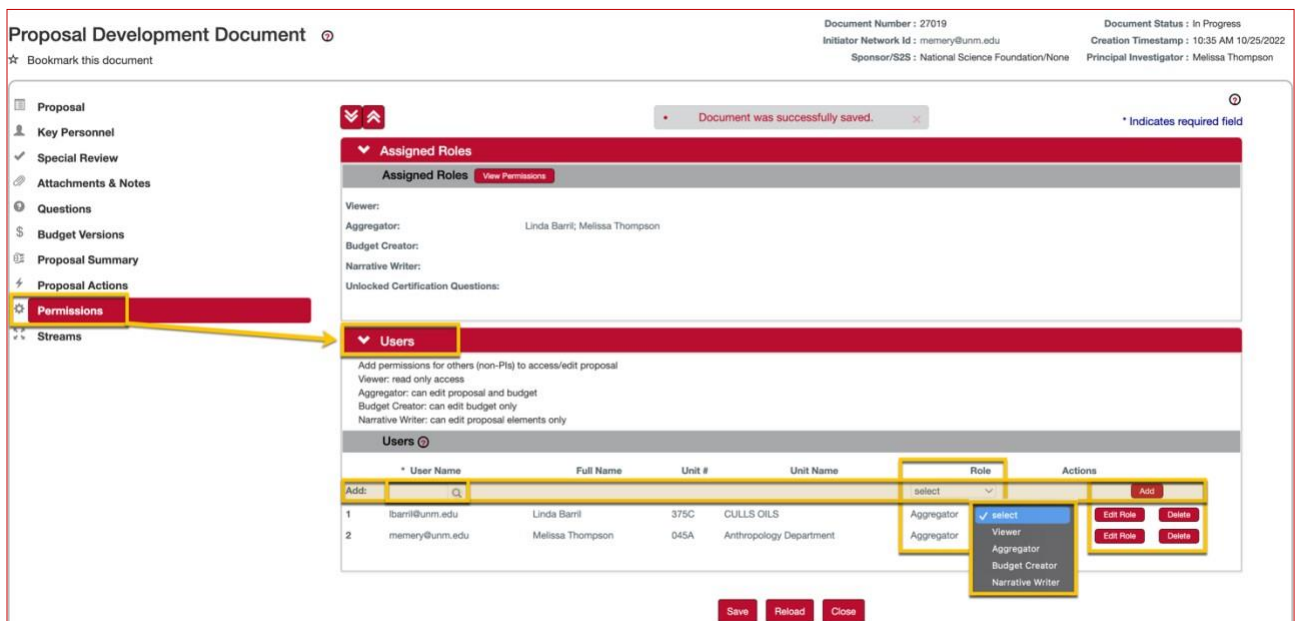
1. Open the existing proposal document
(See *Finding a previously-created proposal* in [Getting Started in Streamlyne](#) guide:
<https://streamlyne.unm.edu/resources/getting-started-in-streamlyne.pdf>)
2. Navigate to the **Permissions** section.



The screenshot shows the Streamlyne web application interface. At the top, there is a navigation bar with the UNM Research logo, user information (Currently signed in as: lbarri@unm.edu), and a search icon. Below the navigation bar is a 'Message(s) of the Day' section. The main content area is titled 'Proposal Development Document' and includes document details such as Document Number (27019), Document Status (In Progress), Initiator Network Id (memory@unm.edu), Creation Timestamp (10:35 AM 10/25/2022), Sponsor/S2S (National Science Foundation/None), and Principal Investigator (Melissa Thompson). A sidebar menu on the left lists various sections: Proposal, Key Personnel, Special Review, Attachments & Notes, Questions, Budget Versions, Proposal Summary, Proposal Actions, Permissions (highlighted with a yellow box and a yellow arrow), and Streams. A 'Required Fields for Saving Document' section is visible on the right, containing instructions and a search bar. A notification at the top right of the main content area states 'Document was successfully saved.'



- 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.



Document Number : 27019
 Initiator Network Id : memery@unm.edu
 Sponsor/S2S : National Science Foundation/None
 Document Status : In Progress
 Creation Timestamp : 10:35 AM 10/25/2022
 Principal Investigator : Melissa Thompson

Document was successfully saved.

Assigned Roles

Viewer:
 Aggregator: Linda Barril, Melissa Thompson
 Budget Creator:
 Narrative Writer:
 Unlocked Certification Questions:

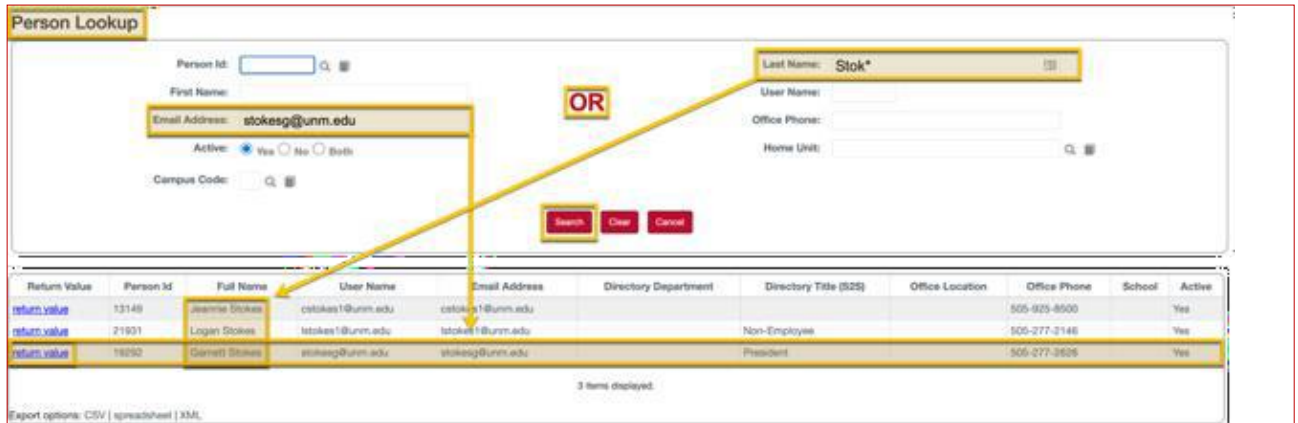
Users

Add permissions for others (non-PIs) to access/edit proposal
 Viewer: read only access
 Aggregator: can edit proposal and budget
 Budget Creator: can edit budget only
 Narrative Writer: can edit proposal elements only

* User Name	Full Name	Unit #	Unit Name	Role	Actions
1 lbarril@unm.edu	Linda Barril	375C	CULLS OILS	Aggregator	View Permissions, Edit Role, Delete
2 memery@unm.edu	Melissa Thompson	045A	Anthropology Department	Aggregator	View Permissions, Edit Role, Delete

Save Reload Close

- 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.



Person Lookup

Person Id:

First Name:

Email Address:

Active: Yes No Both

Campus Code:

OR

Last Name:

User Name:

Office Phone:

Home Unit:

Return Value	Person Id	Full Name	User Name	Email Address	Directory Department	Directory Title (S2S)	Office Location	Office Phone	School	Active
return value	13149	Jeanne Stokes	dstokes1@unm.edu	dstokes1@unm.edu				505-925-8500		Yes
return value	21901	Ligan Stokes	lstokes1@unm.edu	lstokes1@unm.edu		Non-Employee		505-277-2148		Yes
return value	19252	Garnett Stokes	gstokes@unm.edu	gstokes@unm.edu		President		505-277-2525		Yes

3 items displayed.

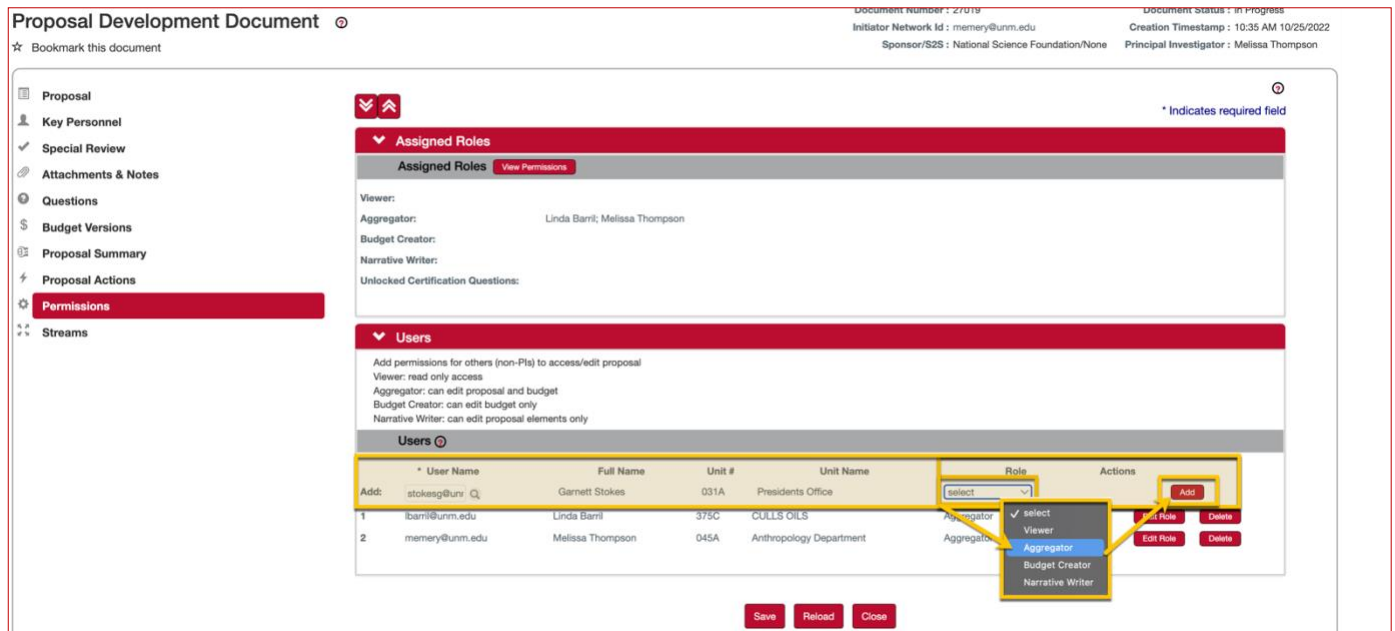
Export options: CSV | spreadsheet | XML

(See [How to Perform Searches in Streamlyne](https://streamlyne.unm.edu/resources/index.html) from the *Quick Tips* section at <https://streamlyne.unm.edu/resources/index.html>.)

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.



Proposal Development Document

Document number : 21019
Initiator Network Id : memery@unm.edu
Sponsor/S2S : National Science Foundation/None

Document status : In Progress
Creation Timestamp : 10:35 AM 10/25/2022
Principal Investigator : Melissa Thompson

Assigned Roles

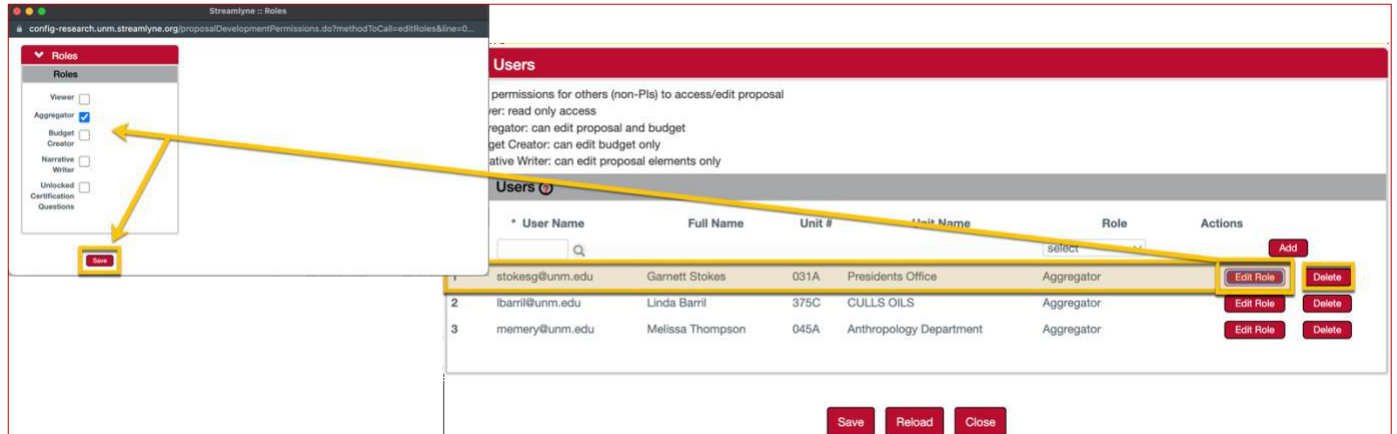
Viewer:
Aggregator: Linda Barril; Melissa Thompson
Budget Creator:
Narrative Writer:
Unlocked Certification Questions:

Users

Add permissions for others (non-PIs) to access/edit proposal
Viewer: read only access
Aggregator: can edit proposal and budget
Budget Creator: can edit budget only
Narrative Writer: can edit proposal elements only

* User Name	Full Name	Unit #	Unit Name	Role	Actions
Add: stokesg@unm.edu	Garnett Stokes	031A	Presidents Office	<input type="text" value="select"/>	<input type="button" value="Add"/>
1. lbarril@unm.edu	Linda Barril	375C	CULLS OILS	Aggregator	<input type="button" value="View Role"/> <input type="button" value="Delete"/>
2. memery@unm.edu	Melissa Thompson	045A	Anthropology Department	Aggregator	<input type="button" value="View Role"/> <input type="button" value="Delete"/>

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.



The screenshot shows the Streamlyne Roles and Users management interface. On the left, the 'Roles' panel is expanded, showing a list of roles with checkboxes: Viewer, Aggregator (checked), Budget, Creator, Narrative, Writer, Unbudgeted, Certifications, and Questions. A yellow box highlights the 'Save' button at the bottom of this panel. On the right, the 'Users' panel displays a table of users. The table has columns for User Name, Full Name, Unit #, Unit Name, Role, and Actions. The first row is highlighted in yellow, and a yellow box highlights the 'Edit Role' and 'Delete' buttons in the Actions column. A yellow arrow points from the 'Aggregator' role in the Roles panel to the 'Edit Role' button in the first row of the Users table. Below the table are 'Save', 'Reload', and 'Close' buttons.

* User Name	Full Name	Unit #	Unit Name	Role	Actions
stokesg@unm.edu	Garnett Stokes	031A	Presidents Office	Aggregator	Edit Role Delete
2 lbarril@unm.edu	Linda Barril	375C	CULLS OILS	Aggregator	Edit Role Delete
3 memery@unm.edu	Melissa Thompson	045A	Anthropology Department	Aggregator	Edit Role Delete