













# QUICK TIPS:

## Proposal Permissions in

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.

### Proposal Development Document

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1. Within your proposal document, select **Permissions** from the menu on the left.

2. 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.

### ➤ Assigned Roles

### ▼ 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

#### Users

* User Name	Full Name	Unit #	Unit Name	Role	Actions
Add: <input type="text" value=""/> 				<input type="text" value="select"/>	<input type="button" value="Add"/>
1  @unm.edu			Department	Aggregator	<input type="button" value="Edit Role"/> <input type="button" value="Delete"/>

3. 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 TAB. 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**. 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.
- *HOW TO SEARCH IN  
STREAMLYNE*

**LINK**
4. 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
  5. Click **Add** to finalize your selection.
  6. To edit permissions, you may click **Delete** to remove all proposal access to a person or **Edit Role** to provide different levels of access.

### 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](mailto:osp@unm.edu), 505-277-4186) to request that the lock be removed.