

Module 2

Professional Profiles



Objectives

2

- In this module you will learn:
 - Professional Profile basics
 - How to create a Professional Profile
 - How to add Biosketches
 - How to assign permissions to a Professional Profile
 - How to avoid duplicate Professional Profiles

What is a Professional Profile

- Professional Profiles capture and store data about Principal Investigators, Key Personal, Other Significant Contributors, administrators, Signing Officials, etc.
- Before you create a grant application, please verify if the Principal Investigator has a Professional Profile, if not you will need to create one.

Utilizing Professional Profiles

4

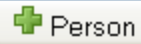
- Information stored in the Professional Profile is auto-filled into the grant application once that individual is named as a PI, Senior/Key Person or Authorized Representative
- Profiles stored in Cayuse424 can be shared with others and used multiple times
- After you create a profile for the PI you must then set up Professional Profiles for all Key Personnel and Other Significant Contributors named in the grant application if a profile has not already been created for them (this can be done after you create the proposal)

Profile Development Steps

1. Create Professional Profile
2. Associating profile with Institution
3. Complete profile fields
4. Attach biosketches
5. Add permissions
6. Link User account to Professional Profile

Creating a Professional Profile

6

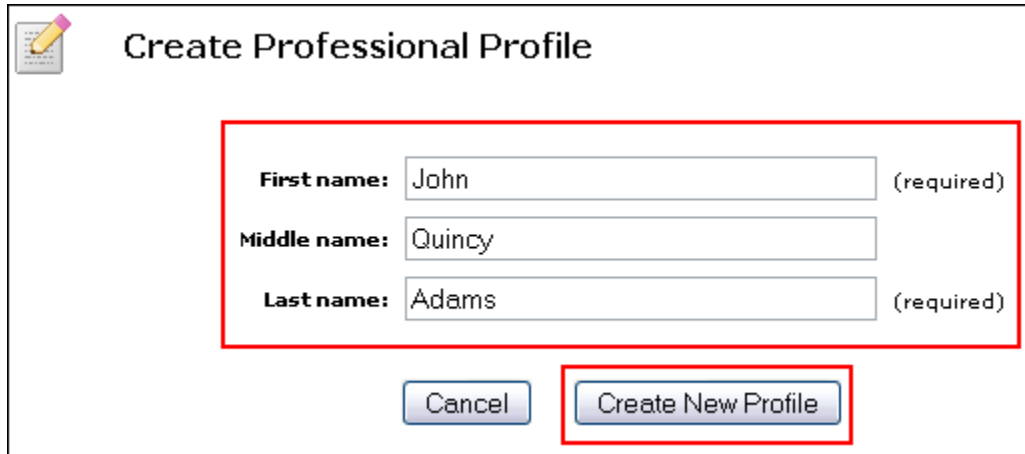
1. Login to Cayuse424 and click the **People** tab
2. Click the  icon




Creating a Professional Profile

7

3. Enter First and Last Name
4. Click the **Create New Profile** button



 Create Professional Profile

First name: (required)

Middle name:

Last name: (required)

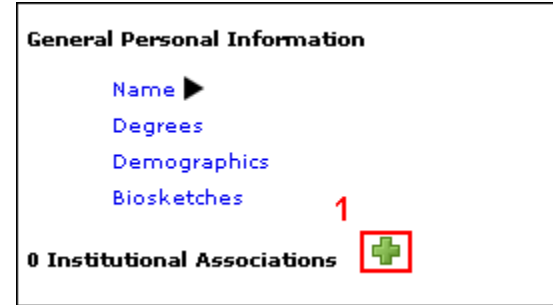
Institutional Association

- Once the Professional Profile is created it must be affiliated with an institution
- This is achieved by linking the Professional Profile to an Institutional Profile
- Once an individual (Profile) is associated with an institution, basic institutional information (e.g., address) can be auto-filled into that individual's Professional Profile.
- Professional Profiles should only be created for UCR personnel (For more information on adding senior/key personnel from outside UCR, see Module 6.)

Creating an Institutional Association

9

1. Click the  located next to **Institutional Associations** within the Professional Profile



Creating an Institutional Association

10

2. Select the Institution using the drop-down menu
3. Click the **Create Institutional Association** button



Create Institutional Association

Institution: ▼

Create Institutional Association

Cancel

Completing the Professional Profile

11

- Complete the following fields by clicking on the associated hyperlinks:
 - ▣ Name
 - ▣ Degrees
 - ▣ Demographics
 - ▣ Contact Information
 - ▣ eRA Role
 - ▣ Dept/Division/Title

General Personal Information

[Name ▶](#)

[Degrees](#)

[Demographics](#)

[Biosketches](#)

1 Institutional Association 

 **U of C**

[Inst. association "nickname"](#)

[Contact Info](#)

[eRA Role](#)

[Dept / Division / Title](#)


[Salary and Fringe Worksheet](#)

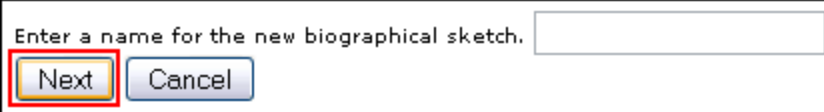
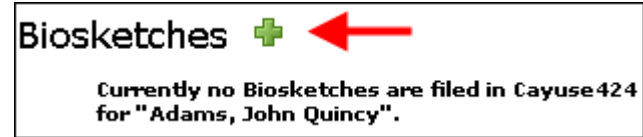
Completing the Professional Profile

- Salary and Fringe Worksheet
 - If Appointment type is not entered into the Professional Profile, Cayuse424 will not be able to auto-calculate salary on the budget pages
 - Base Fringe Rate and Fringe Rate Total can be imported from the Institutional Profile by clicking the **Import Institutional Rates** button
 - To add additional Fringe Rates click **New Row** and follow system prompts

Attaching Biosketches

13

1. To upload a Biosketch to the Professional Profile click the 
2. Type in a name for the Biosketch and click **Next**



Enter a name for the new biographical sketch.

Next Cancel

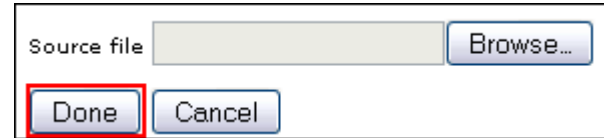
Attaching Biosketches

14

3. Click **Browse** to locate PDF version of Biosketch you've previously created
4. Click **Next**
5. Repeat Step 3 to attach Source (Word) version of Biosketch (optional)
6. Click **Done**



Enter the name of the PDF file to upload










Source file

The Attached Biosketch

15

- Multiple Biosketches can be created and stored in each Professional Profile
- Once Biosketches are attached to the Professional Profile they can be easily attached to the proposal on the Senior/Key Persons page

Biosketches 


Name	pdf	src	Delete
John's Bio	yes 	yes 	
John's Bio II	yes 	yes 	

Managing Permissions

- Once a Professional Profile has been created permissions can be assigned
- The creator of a Professional Profile is automatically granted all permissions associated with using that profile
- The profile creator can share the profile with other users by granting appropriate permissions
- Permissions can be changed or removed

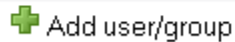
Adding Permissions

17

1. To grant permission(s) to other Cayuse424 users click the[] icon in the upper right
2. Click **Add user/group**

Permissions for Professional Profile: Adams, John Quincy

2

 Add user/group

Adding Permissions

18

3. Enter a **First name, Last name or User name**
4. Select the user from your search results
5. Click **Close** Click **Close**

Add Security Principal [close](#)

[Show Recently Used](#) | [Show All](#)

Select **Users** or **Groups** below to provide access to this **Proposal**.

Showing **Search Results:** 1 principal available

Type	Group or User	Profile Name
U	mspears	Spears, Michael

Adding Permissions

19

- Once the user is added, check or uncheck permissions, as desired

		List	Read	Write	Autofill	Delete	Change Permissions	Add User/Group	Remove User/Group
✘	(jcolley)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
✘	AllUsers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
✘	Spears, Michael (mspears)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Permission Definitions

20

List

Allows the “User” to view a profile on the Professional Profiles list

Read

Allows the “User” to read the details of a profile

Read/Write

Allows the “User” to add, change or delete information on a Professional Profile

Autofill

Allows the “User” to Autofill the Professional Profile onto a proposal

Delete

Allows the “User” to delete a Professional Profile

Permission Definitions

21

Change Permissions

Allows the “User” to change security permissions associated with the Professional Profile

Add User/Group

Allows the “User” to add other users to the Professional Profile

Remove/User Group

Allows the “User” to remove a user or group

Duplicate Professional Profiles

22

- Cayuse424 provides tools to reduce the proliferation of duplicate profiles. When you create a new profile, you see potential matching names and are asked to verify before creating a potential duplicate.
- More control over the permissions and visibility of new profiles to further reduce the chance of creating duplicates.



Conclusion

23

- ☑ In this module you learned:
 - ☑ Professional Profile basics
 - ☑ How to create a Professional Profile
 - ☑ How to add biosketches
 - ☑ How to assign permissions to a Professional Profile
 - ☑ How to avoid duplicate Professional Profiles

