Module 2

Professional Profiles
Objectives

- 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

- 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

1. Login to Cayuse424 and click the **People** tab

2. Click the [ ![Person] ] icon
Creating a Professional Profile

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

1. Click the + located next to Institutional Associations within the Professional Profile
Creating an Institutional Association

2. Select the Institution using the drop-down menu

3. Click the **Create Institutional Association** button
Completing the Professional Profile

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

1. To upload a Biosketch to the Professional Profile click the +

2. Type in a name for the Biosketch and click Next
Attaching Biosketches

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**
The Attached Biosketch

- 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.
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

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
3. Enter a **First name**, **Last name** or **User name**

4. Select the user from your search results

5. Click **Close**
Adding Permissions

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

<table>
<thead>
<tr>
<th></th>
<th>List</th>
<th>Read</th>
<th>Write</th>
<th>Autofill</th>
<th>Delete</th>
<th>Change Permissions</th>
<th>Add User/Group</th>
<th>Remove User/Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>(jcolley)</td>
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<tr>
<td>Spears, Michael (mspears)</td>
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</tbody>
</table>
## Permission Definitions

<table>
<thead>
<tr>
<th>Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List</td>
<td>Allows the “User” to view a profile on the Professional Profiles list</td>
</tr>
<tr>
<td>Read</td>
<td>Allows the “User” to read the details of a profile</td>
</tr>
<tr>
<td>Read/Write</td>
<td>Allows the “User” to add, change or delete information on a Professional Profile</td>
</tr>
<tr>
<td>Autofill</td>
<td>Allows the “User” to Autofill the Professional Profile onto a proposal</td>
</tr>
<tr>
<td>Delete</td>
<td>Allows the “User” to delete a Professional Profile</td>
</tr>
</tbody>
</table>
## Permission Definitions

<table>
<thead>
<tr>
<th>Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Permissions</td>
<td>Allows the “User” to change security permissions associated with the Professional Profile</td>
</tr>
<tr>
<td>Add User/Group</td>
<td>Allows the “User” to add other users to the Professional Profile</td>
</tr>
<tr>
<td>Remove/User Group</td>
<td>Allows the “User” to remove a user or group</td>
</tr>
</tbody>
</table>
**Duplicate Professional Profiles**

- 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.

![Profile Name Conflict](image)

*The name 'John Heldens' may match the existing profile below:*

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Heldens</td>
<td>University of Cayuse</td>
<td>Neurology</td>
</tr>
</tbody>
</table>

If you need access to a profile, please contact the department admin.
Conclusion

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