

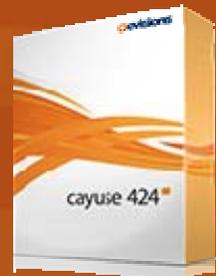


## Professional Profiles

### Module 3

Research Suite Product Support  
ResearchSuiteSupport@Evisions.com

**cayuse 424**  
Electronic Proposal  
Development and Submission



# Objectives

In this module you will learn:

- What a professional profile is
- How to create a professional profile
- How to find an existing professional profile
- How to add biosketches to a profile
- How to assign permissions to a profile
- How to avoid duplicate profiles

# What is a Professional Profile?

- Professional profiles capture and store data about Principal Investigators, Key Personnel, Other Significant Contributors, AORs, Signing Officials, and other important personnel.
- Before you create a proposal, locate or create professional profiles for the personnel who will be named in the proposal.

# Using Professional Profiles

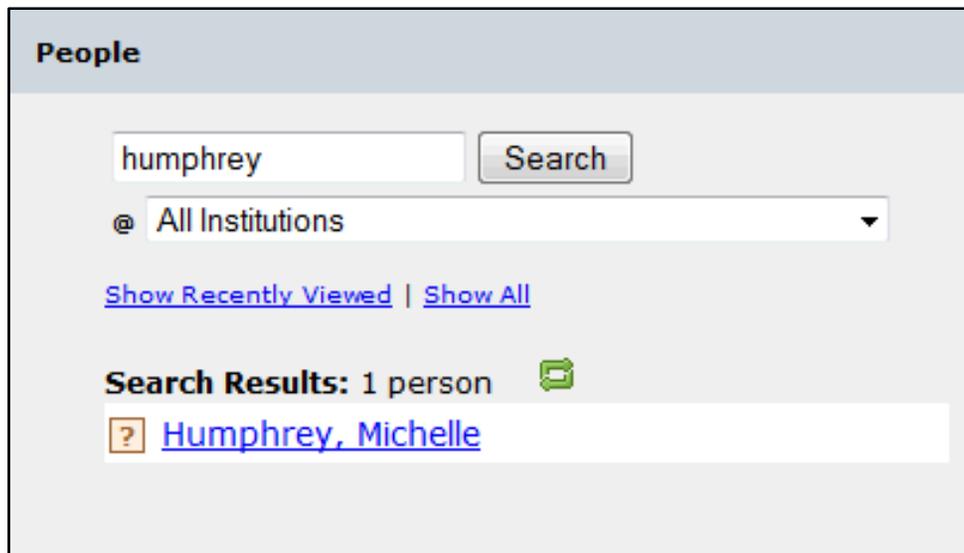
- Information stored in a person's professional profile is autofilled into a proposal when the person is selected as a:
  - PI/PD
  - Senior/Key Person
  - Authorized Representative (AOR)
  - Administrative Contact
  - Payee
- Professional profiles stored in Cayuse 424 can be shared with others and re-used for each proposal.

# Profile Development Steps

1. Create a professional profile.
2. Associate the profile with an institution.
3. Complete the profile fields.
4. Attach available biosketches.
5. Add appropriate users to the profile's permissions area.
6. Link the person's user account to the professional profile.

# Finding a Professional Profile

1. Click the **People** tab
2. Enter the person's first or last name in the search box.
3. Click **Search**.



The screenshot shows a search interface titled "People". It features a search input field containing the text "humphrey" and a "Search" button. Below the search field is a dropdown menu with the text "@ All Institutions". Underneath the dropdown are two links: "Show Recently Viewed" and "Show All". The search results section displays "Search Results: 1 person" with a small green icon. Below this, there is a single result: a question mark icon followed by the text "Humphrey, Michelle" in blue, which is a clickable link.

If you find a profile for the person, you will not need to create one.

# Creating a Professional Profile

1. Sign in to Cayuse 424 and click the **People** tab.
2. Click the Add Person button: 



# Creating a Professional Profile

3. Enter the person's name.
4. Click **Create New Profile**.



The screenshot shows a web form titled "Create Professional Profile" with a green plus icon. It contains three input fields: "First name:" with the value "John" and "(required)" label; "Middle name:" with the value "Quincy"; and "Last name:" with the value "Adams" and "(required)" label. Below the fields are two buttons: "Cancel" and "Create New Profile". A mouse cursor is visible near the bottom right of the form.

5. The profile will be created with fields for basic biographical information:



The screenshot shows a web page titled "Professional Profile: Adams, John Quincy" with a red close icon. The page is divided into two main sections. The left section, "General Personal Information", contains links for "Name", "Degrees", "Demographics", and "Biosketches", and a section for "0 Institutional Associations" with a green plus icon. The right section, "Name", contains fields for "Prefix:", "First:", and "Middle:".

# Institutional Association

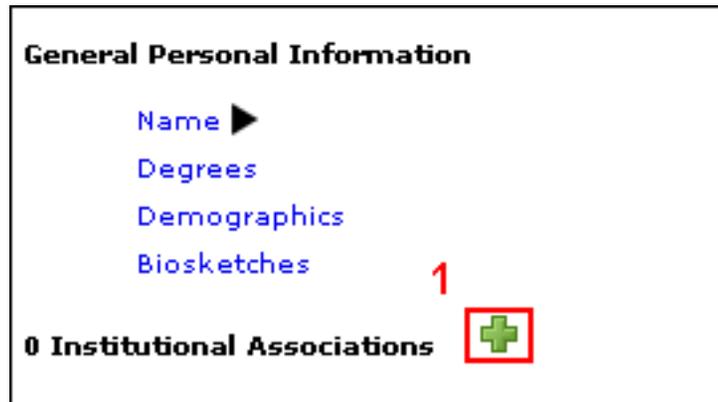
Once the profile is created, it must be affiliated with an institutional association. The institutional association holds:

- Position title and department
- Contact information
- eRA Role

\*Professional Profiles should only be created for UCSB personnel. (For more information on adding senior/key personnel from outside UCSB, see module 6)

# Adding an Institutional Association

1. Click the add button next to **Institutional Associations**  in the professional profile:



# Adding an Institutional Association

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

 **Create Institutional Association**

2 **Institution:** Select..

3 **Create Institutional Association** **Cancel**

# Completing the Professional Profile

Click each section to enter the relevant information.

- Name
- Degrees
- Demographics
- Contact Info
- eRA Role
- Dept / Division / Title
- Performance Site

**General Personal Information**

[Name](#) ▶

[Degrees](#)

[Demographics](#)

[Biosketches](#)

**1 Institutional Association** 

 [CayU](#)

[Contact Info](#)

[eRA Role](#)

[Dept / Division / Title](#)

[Salary and Fringe Worksheet](#)

[Performance Site](#)

 [Routing Profile](#)

# eRA Role

- Selecting an eRA role means the person's profile will appear when searching for people to add to the proposal in that role.

University of Cayuse  
**eRA Role**

**Role(s):**  Principal Investigator  
 Assistant  
 Administrative Official  
 Signing Official / "AOR"  
 Payee

## eRA Role

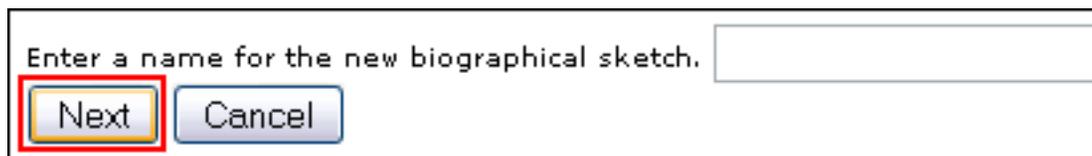
- **Principal Investigator:** Displays person as an option when selecting a PI.
- **Administrative Official:** Displays person as an option when selecting the “Person to be contacted on matters involving this application”.
- **Signing Official / “AOR”:** Displays person as an option when selecting the Authorized Representative.
- **Assistant:** Does not affect autofill inclusion.
- **Payee:** Displays person as an option when selecting a Payee for Environmental Protection Agency (EPA) proposals.

# Attaching Biosketches

1. Click  next to Biosketches.



2. Enter a name for the biosketch and click **Next**.



Enter a name for the new biographical sketch.

# Attaching Biosketches

3. Click **Browse** to locate the PDF version of the biosketch.



Enter the name of the PDF file to upload

4. Click **Next**.
5. Click **Browse** again to attach source (e.g. Word) version of the biosketch. (optional)
6. Click **Done**.



Source file

# Attaching Biosketches

- Multiple biosketches can be created and stored in each professional profile.
- Once biosketches are attached to the professional profile, they can easily be included on the Senior/Key Persons form of the proposal.

Biosketches 

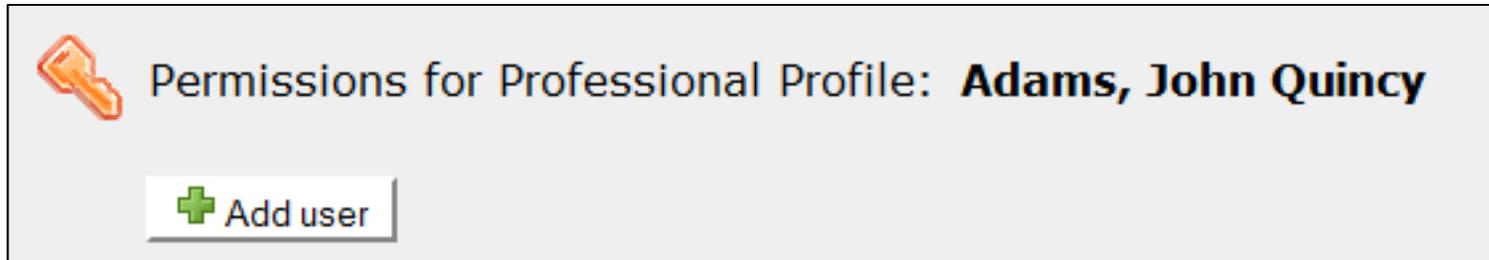
Name	pdf	src	Delete
John's Bio	yes ↑	yes ↑	
John's Bio II	yes ↑	yes ↑	

# Profile 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 that profile.
- The profile creator can share the profile with other users by granting appropriate permissions.
- Permissions can be changed or removed as needed.

# Adding Permissions

1. To grant profile permissions to other users, click the permissions key in the upper right:
2. Click **Add user**.



# Adding Permissions

3. Select a user from the list, or search by **first name, last name** or **username**.
4. Click the username in your search results. The user will be added to the permissions.
5. Click **Close**.

Add Security Principal close

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

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

**Search Results:** 1 principal match

Type	↑ User	Profile Name
U	mspears	Spears, Michael

# Adding Permissions

- After adding the user to the permissions, select the permissions they should have.

	List	Read	Write	Attach	Break Lock	Delete	Print	Change Permissions	Add User	Remove User	Submit
 PI, PI (PI)	<input checked="" 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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- The default permissions are List, Read, and Autofill.
- Permissions are mostly independent, so if you want someone to be able to edit the profile, be sure to assign Read as well.

# Permission Definitions

List	Can see the profile in lists, but cannot view or modify the details of the profile.
Read	Can view the details of the profile.
Write	Can modify all data within the profile.
Autofill	Can autofill the professional profile into a proposal.
Delete	Can delete the professional profile.
Change Permissions	Can change security permissions for the professional profile.
Add/Remove User	Can add or remove other users from the profile permissions.

# Duplicate Professional Profiles

- To prevent confusion, each person should have only one professional profile in the system.
- To avoid duplicate profile creation, you see a list of matching names and are asked to verify before creating a new profile.
- \*Duplicate profiles should not be created. If you need to add a PI who has multiple appointments, you should autofill the current profile, and then make any necessary changes within your proposal.

**Profile Name Conflict**

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

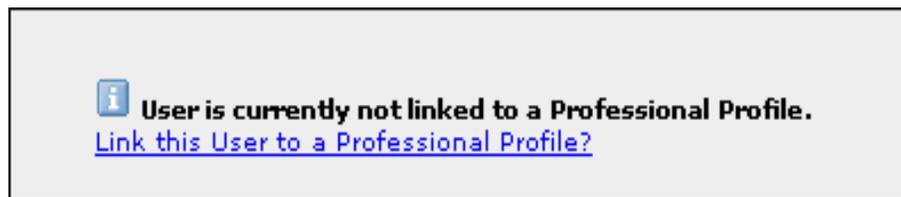
Name	Organization	Department
<b>John Heldens</b>	University of Cayuse	Neurology

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

# Link User to Professional Profile

Now that the profile has been created, the person's user account should be linked to the profile.

1. Click the **Settings** tab
2. Click **Link this User to a Professional Profile?**



3. Select the new professional profile from the list.
4. The user is now linked and can participate in routing and easily find their own profile.

# Conclusion

In this module you learned:

- What a professional profile is
- How to find an existing professional profile
- How to create a professional profile
- How to add biosketches to a profile
- How to assign permissions to a profile
- How to avoid duplicate profiles
- How to link a Cayuse 424 user account to a professional profile