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Professional Profile Overview

Cayuse Professional Profiles contain the necessary information for accessing proposals in Cayuse SP and 424 and for routing and approval of Cayuse SP proposals. Principal Investigators, contract and grant administrators and others that play a role in the proposal process must have a Cayuse Professional Profile.

Tips

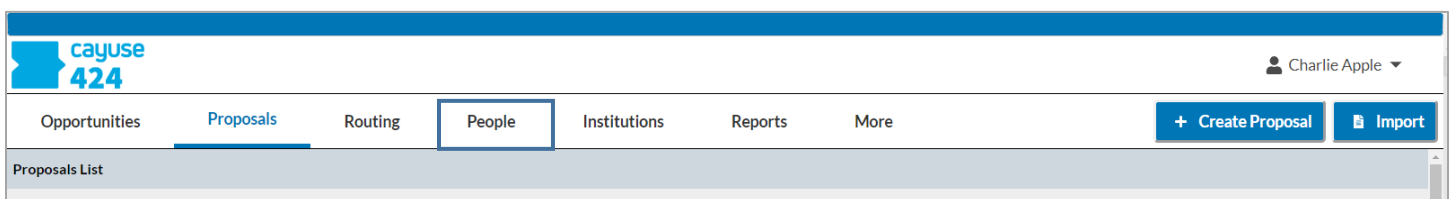
- Ensure smooth routing in Cayuse SP by ensuring the unit code listed is the code used by the department/unit for contracts and grants accounting.
- Streamline budget calculations by keeping salary and appointment information current.
- Improve search speed by selecting the institution when searching for a user.

Find a Professional Profile

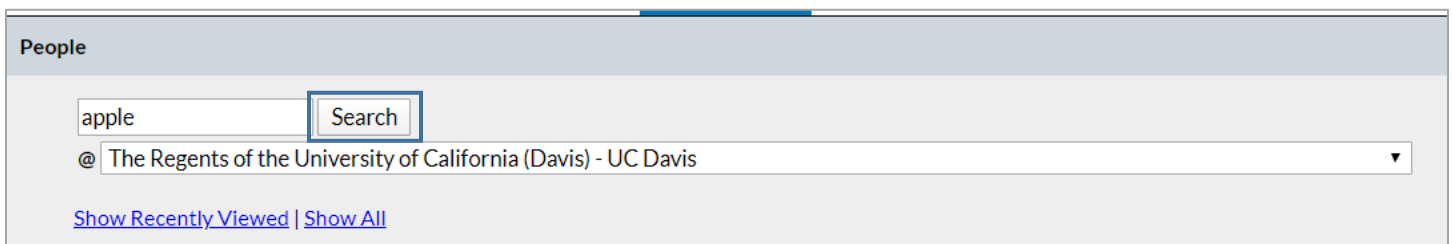
1. Login to the Cayuse Research Suite (<https://ucdavis.cayuse424.com>) using your Kerberos. *If you do not have a Kerberos User Name, work with your department to create one and provide the user Kerberos ID, email address and UC Davis Employee to ORCayuseHelp@ucdavis.edu.*
2. Select “Cayuse 424”.



3. Select “People”.



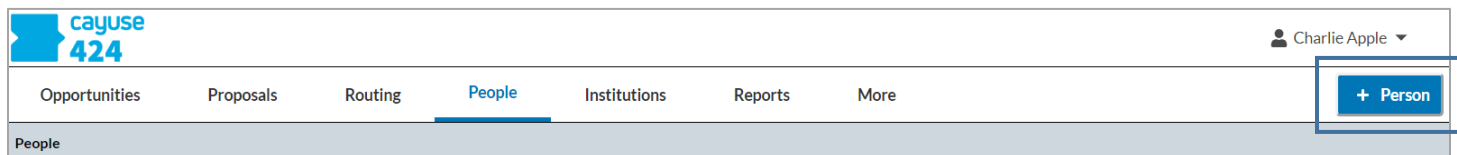
4. Type the last name in the Search field, change the “@” field to “The Regents at the University of California (Davis) – UC Davis” and then select “Search”.



Create a Professional Profile

Do not create a profile for someone else at UC Davis. Contact ORCayuseHelp@ucdavis.edu if you need to create a profile for another UC Davis user.

1. Follow the [steps above](#) to ensure a Professional Profile does not exist for the user.
2. From the People/Professional Profile list, select “+ Person”.



3. Complete the pop-up window and select Create New Profile. Include the person's middle name if applicable.

A screenshot of a 'Create Professional Profile' pop-up window. It features a green plus icon in the top left corner. The title 'Create Professional Profile' is centered at the top. Below the title are three text input fields: 'First name:' with the value 'New' and a '(required)' label, 'Middle name:' which is empty, and 'Last name:' with the value 'Test-Profile' and a '(required)' label. At the bottom of the window are two buttons: 'Cancel' and 'Create New Profile'.

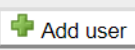
4. Provide permissions/access to this Professional Profile by selecting the Permissions (key) icon. Provide access to contract and grant staff the support the investigator.


A screenshot of the 'Test-Profile, New' page in the Cayuse 424 application. The breadcrumb trail at the top left reads 'People > Test-Profile, New'. In the top right corner, there is a 'Permissions' icon (a key) which is highlighted by a blue rectangular box. The main content area is titled 'Professional Profile: Test-Profile, New' with a red plus icon. On the left side, there is a sidebar with 'General Personal Information' (including links for Name, Degrees, Demographics, and Biosketches) and '0 Institutional Associations' with a green plus icon. The main content area has a 'Name' section with a 'Rename' button. Below the 'Name' section are several input fields: 'Prefix:', 'First: New', 'Middle:', 'Last: Test-Profile', 'Suffix:', 'NIH Commons ID:', 'NASA NSPIRES ID:', and 'NSF ID:'.

- a. Select "+ Add user".

People » Test-Profile, New » Permissions

Permissions for Professional Profile: **Test-Profile, New**



	List	Read	Write	Autofill	Delete	Change Permissions	Add User	Remove User
 Obelleiro, Kassie M (kassie@ucdavis.edu)	<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"/>

- i. If the person you are adding is listed under Recently Used, select their name and skip to step 7.b. below.

Add Security Principal

[Show All](#)

Select *Users* below to provide access to this Professional Profile.

Recently Used: 15 principals

Type	User	Profile Name
U	ipfapprover	Apple, Charlie
U	amieadmin	Admin, Amie

- ii. If the person is not listed under Recently Used, enter their last name in the text field and select "Search".

Add Security Principal

[Show All](#)

Select *Users* below to provide access to this Professional Profile.

Recently Used: 15 principals

Type	User	Profile Name
U	ipfapprover	Apple, Charlie
U	amieadmin	Admin, Amie

- iii. If the person is listed under Search Results, select their name and select “Close”. Then continue to step 7.b. below.

Add Security Principal

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

Select *Users* below to provide access to this Professional Profile.

Search Results: 5 principals match

Type	User	Profile Name
U	cayuse1	Test1, Cayuse
U	cayuse2	Test2, Cayuse

- iv. If their name is not listed, they either do not have a profile or their profile is saved under a different name. Either continue searching under other known names or ask them for more information.
- b. Set the level of permissions to grant by checking and unchecking the appropriate boxes.

Permissions for Professional Profile: **Test-Profile, New**

	List	Read	Write	Autofill	Delete	Change Permissions	Add User	Remove User
Obelleiro, Kassie M (kassie@ucdavis.edu)	<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"/>
Test1, Cayuse (cayuse1)	<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"/>

5. Return to the profile to finish completing the required information by selecting the profile name in the breadcrumbs. Once a user is added to the Permissions page, they may finish completing the profile.

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[Opportunities](#)
[Proposals](#)
[Routing](#)
[People](#)
[Institutions](#)
[Reports](#)
[Admin](#)

[People](#) » [Test-Profile, New](#) » [Permissions](#)


Permissions for Professional Profile: **Test-Profile, New**

	List	Read	Write	Autofill	Delete	Change Permissions	Add User	Remove User
Obelleiro, Kassie M (kassie@ucdavis.edu)	<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"/>
Test1, Cayuse (cayuse1)	<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"/>

6. Complete the following General Personal Information sections. **Do not complete the Demographics and Biosketches sections.**


a. Name:

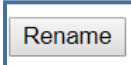
- i. Add the NIH Commons ID if the person will work on or submit proposals to the National Institutes of Health (NIH).
- ii. Select “Rename” to change the person’s name.

Professional Profile: **Test-Profile, New** 

General Personal Information

- * [Name](#) ▶
- [Degrees](#)
- [Demographics](#)
- [Biosketches](#)

0 Institutional Associations 

Name 

Prefix:

First: New

Middle:

Last: Test-Profile


Suffix:


NIH Commons ID:

NASA NSPIRES ID:

NSF ID:


b. Degrees (Optional): Add relevant degree information.


People » **Test-Profile, New** 

Professional Profile: **Test-Profile, New** 

General Personal Information

- * [Name](#)
- * [Degrees](#) ▶
- [Demographics](#)
- [Biosketches](#)

0 Institutional Associations 

Degrees 

NIH Degrees (comma separated, max of 3):

Senior/Key Person Degree Type:

Senior/Key Person Degree Year:

NSF Degree Type:

NSF Degree Year:


7. Add the Institutional Association by selecting the plus (+) sign. This is a **critical** step as it associated the profile with UC Davis.

People » Test-Profile, New

Professional Profile: **Test-Profile, New**

General Personal Information

- * Name
- * Degrees ▶
- Demographics
- Biosketches

0 Institutional Associations 

Degrees ?

NIH Degrees (comma separated, max of 3): PhD, MD


Senior/Key Person Degree Type:

Senior/Key Person Degree Year:

NSF Degree Type: Please Select... ▼

NSF Degree Year:

- a. Find “The Regents of the University of California (Davis) – UC Davis” on the list and select “Create Institutional Association”.

 **Create Institutional Association**

Institution: The Regents of the University of California (Davis) - UC Davis ▼

Create Institutional Association Cancel

8. Complete Contact Info section.

UC Davis

Contact Info

Street 1: 1850 Research Park Drive

Street 2:

City: Davis

State/Province: California ▼

Zip/Postal Code: 95618-6153

County: Yolo

Country: United States of America ▼

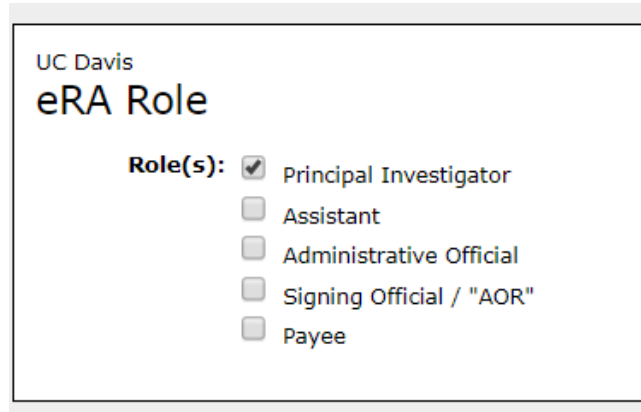
Phone: 555-555-5555

Fax:

Email: npctest-user@ucdavis.edu

Must use Zip+4 format

9. Complete the eRA Role section. **Critical for anyone that will use Cayuse 424 as it grants the relevant access/permissions in Cayuse 424.**
- a. Principal Investigator: Any person that may serve as a Lead Principal Investigator, co-Principal Investigator or any other investigator role on a proposal in Cayuse 424. **Only user with this role will display in the Principal Investigator list.**
 - b. Assistant: Anyone that may assist with proposal preparation in Cayuse 424.
 - c. The other three roles are reserved for the Sponsored Programs office.

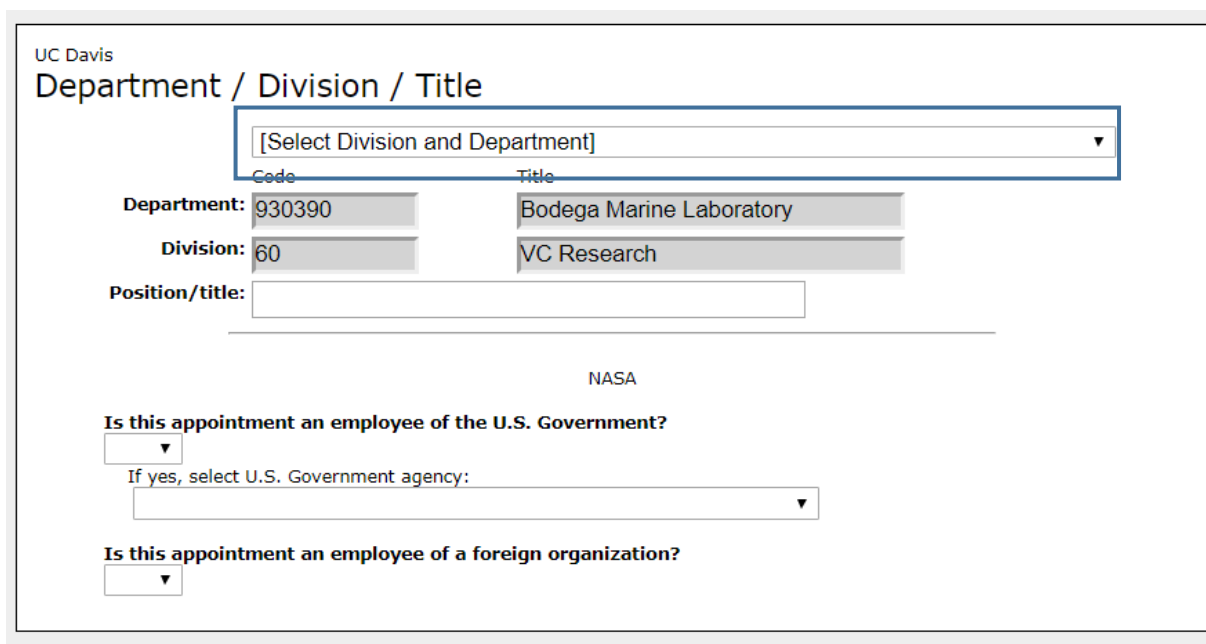


UC Davis
eRA Role

Role(s):

- ☒ Principal Investigator
- ☐ Assistant
- ☐ Administrative Official
- ☐ Signing Official / "AOR"
- ☐ Payee

10. Complete the Department/Division/Title section. This is a **critical** step for all users as it manages Cayuse SP routing and approvals.
- a. Select the unit that will be used most often to approve the person's effort on proposals for extramural funding. Having the incorrect unit will cause routing errors in Cayuse SP any time this person is added to a Cayuse SP Proposal/Internal Processing Form.



UC Davis
Department / Division / Title

[Select Division and Department] ▼

Code	Title
Department: 930390	Bodega Marine Laboratory
Division: 60	VC Research

Position/title:

NASA

Is this appointment an employee of the U.S. Government?
▼

If yes, select U.S. Government agency:

Is this appointment an employee of a foreign organization?
▼

11. Complete the Salary and Fringe Worksheet section.

- Employee ID: Enter the person's UC Davis ID if known.
- Appointment Type: Enter the person's relevant appointment months and associated salary. Use the annualized salary to aid in budget calculations. *Learn about annualizing salary and other proposal budget preparation topics in our [Preparing a Proposal Budget Toolkit](#).*
- Select Import Institutional Rates, then select the appropriate rate type.

UC Davis

Salary / Appointment type

Employee ID:

Appt Type:

	Months	Salary
Calendar:	<input type="text"/>	<input type="text"/>
Academic:	9	100000
Summer:	3	33333

Fringe Worksheet

Category: Academic senate

Import Institutional Rates

Entry (\$)	Factor (%)
	38.1

+ New Row

Base Fringe Rate: %

Fringe Rate Total: 38.10%

12. Complete the Performance Site section by adding the location where most of the person's work will be performed. If the DUNS number and Congressional District are not auto-populated, enter that information as well.

UC Davis

Performance Site

☐ Active

Organization Name: University of California, Davis

Street 1: 1850 Research Park Drive

Street 2:

City: Davis

State/Province: California

Zip/Postal Code: 95618-6153

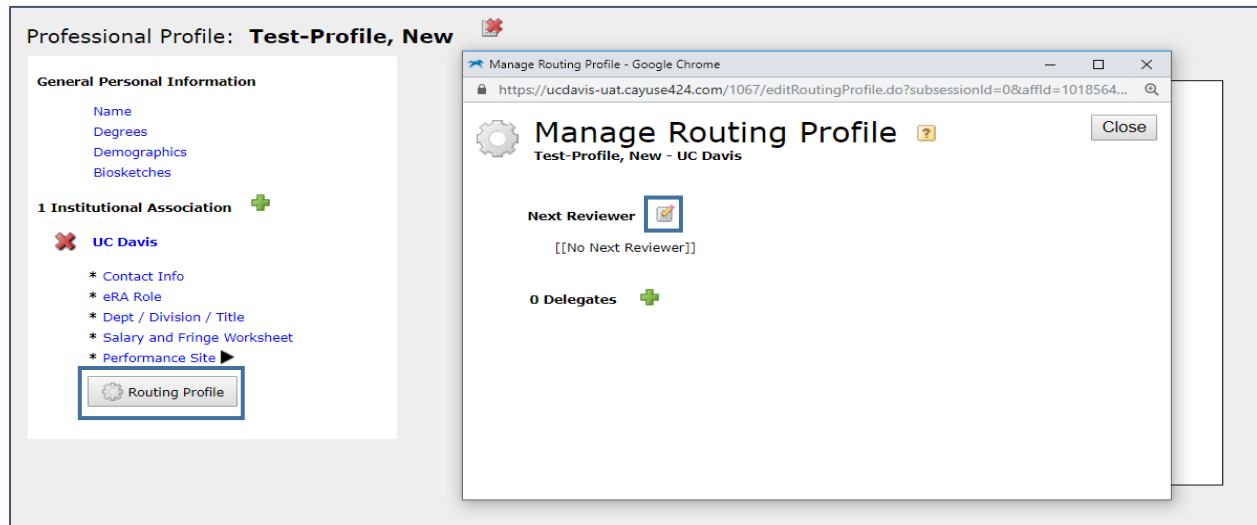
County: Yolo

Country: United States of America

Organization DUNS: 047120084

Congressional District: CA-003

13. Routing Profile (optional): If the profile is for a Principal Investigator, set up their Routing Profile. This will save time when creating Cayuse 424 proposals as the routing chain will be auto-populated anytime this person is added as the Lead Principal Investigator to a Cayuse 424 proposal. Only add the usual SPO analyst and others that must approve the 424 proposal separate from Cayuse SP. **Use this option sparingly.**
- Select the Next Reviewer icon to add a person after the Lead Principal Investigator in the Cayuse 424 proposal routing chain.



- Enter the person's last name in the search field and select "Search".

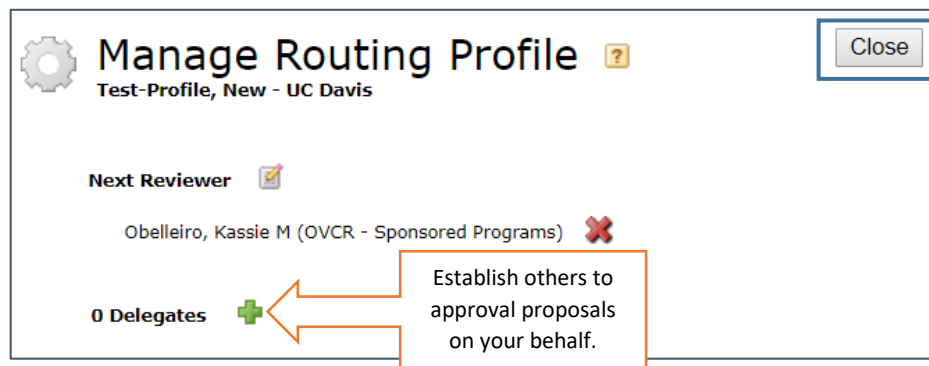
The image shows a 'Set Next Reviewer' dialog box. It has a title bar with a pencil icon and the text 'Set Next Reviewer'. Below the title bar is a search input field containing the text 'obelleiro' and a 'Search' button. Below the search field is a link that says 'Show All'. At the bottom of the dialog, it says 'List is Empty - use Search' and there is a 'Cancel' button.

- c. Select the person's name under Search Results, and then select "Set Next Reviewer".



The "Set Next Reviewer" dialog box features a search bar with the text "obelleiro" and a "Search" button. Below the search bar is a "Show All" link. The "Search Results:" section contains a list box with the entry "Obelleiro, Kassie M (OVCR - Sponsored Programs)" selected. At the bottom of the dialog are "Cancel" and "Set Next Reviewer" buttons.


- d. Select "Close" when the routing chain is complete.




The "Manage Routing Profile" dialog box, titled "Test-Profile, New - UC Davis", includes a "Close" button in the top right corner. It displays the "Next Reviewer" as "Obelleiro, Kassie M (OVCR - Sponsored Programs)" with a red "X" icon. Below this, it shows "0 Delegates" with a green plus icon. An orange callout box with an arrow pointing to the plus icon contains the text: "Establish others to approval proposals on your behalf."


Update a Professional Profile


1. [Find and open the Professional Profile.](#)
2. Update the sections as needed. However, **never select the X next to UC Davis**. To change the Department/Unit, select the Dept/Division/Title section and make the appropriate changes. See [Create a Professional Profile](#) for the details of each section.



[People](#) » **Apple, Charlie** 

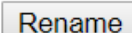
Professional Profile: Apple, Charlie 

General Personal Information

- * [Name](#) 
- [Degrees](#)
- [Demographics](#)
- [Biosketches](#)

1 Institutional Association 

-  **UC Davis (OVCR - Sponsored Programs)**
 - [Contact Info](#)
 - [eRA Role](#)
 - [Dept / Division / Title](#)
 - [Salary and Fringe Worksheet](#)
 - [Performance Site](#)
-  [Routing Profile](#)

Name 

Prefix:

First: Charlie

Middle:

Last: Apple

Suffix:

NIH Commons ID:

NASA NSPIRES ID:

NSF ID: