

Module 3

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Professional Profiles



Objectives

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- 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?

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- ❑ Professional Profiles capture and store data about Principal Investigators, Key Personal, Other Significant Contributors, administrators, Signing Officials, etc.
- ❑ Before you create a grant application, you must create a Professional Profile for the Principal Investigator who is named in the grant


Utilizing Professional Profiles

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- ❑ Information stored in the Professional Profile is auto-filled into the grant proposal once that individual is named as a PI, Senior/Key Person or Authorized Representative
- ❑ Profiles stored in the system 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 proposal if a profile has not already been created for them (this can be done after you create the proposal)


Profile Development Steps

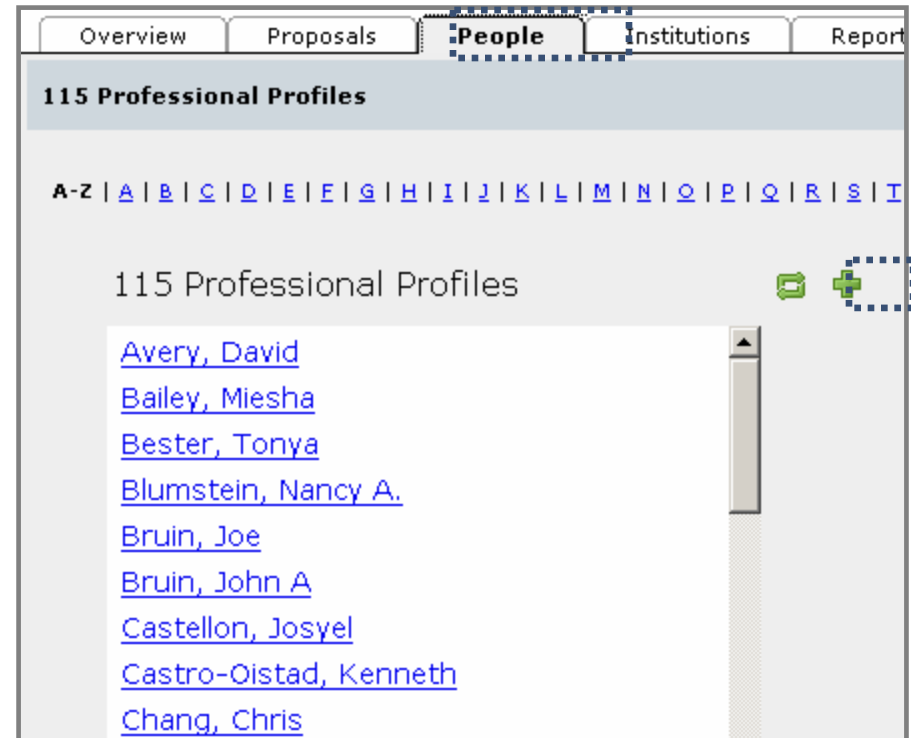
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1. Create Professional Profile
 2. Associate profile with Institution
 3. Complete profile fields
 4. Attach biosketches
 5. Add permissions
 6. Link User account to Professional Profile
-  View the *Business Processes Document* in the Resources tab of your training handbook or the S2S Grants project website for more information

Creating a Professional Profile

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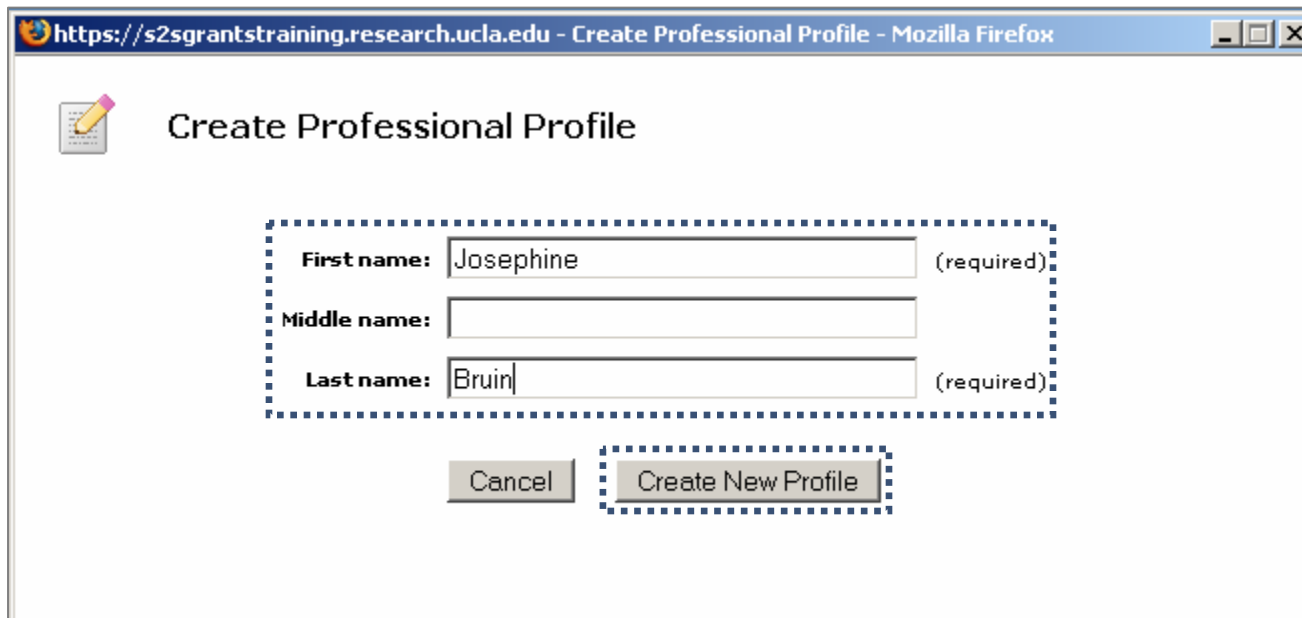
1. Login to S2S Grants and click the **People** tab
2. Click the [] icon



Creating a Professional Profile

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



The screenshot shows a web browser window with the address bar displaying <https://s2sgrantstraining.research.ucla.edu> and the page title "Create Professional Profile - Mozilla Firefox". The page content includes a pencil icon and the heading "Create Professional Profile". Below this, there are three text input fields: "First name:" with the value "Josephine" and "(required)" to its right; "Middle name:" which is empty; and "Last name:" with the value "Bruin" and "(required)" to its right. A dashed blue box highlights these three fields. At the bottom of the form, there are two buttons: "Cancel" and "Create New Profile", with the latter also highlighted by a dashed blue box.


Institutional Association

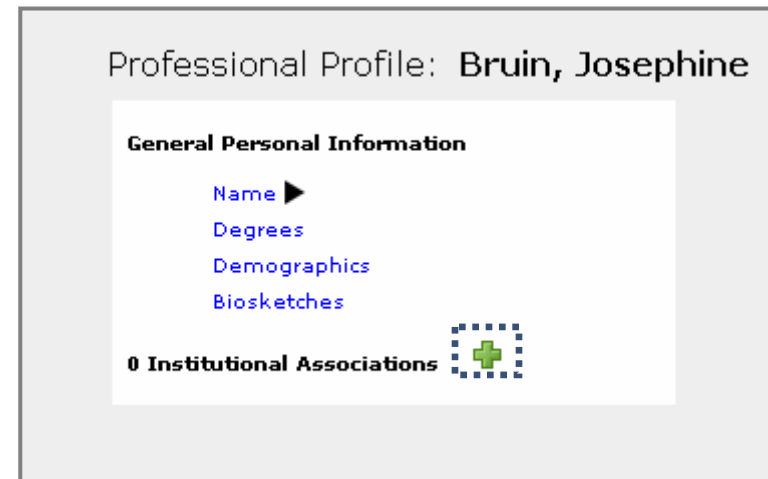
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- ❑ Once the Professional Profile is created it must be affiliated with an institution
- ❑ This is achieved by linking the Professional Profile to an Institutional Profile
- ❑ Once an individual (Profile) is associated with an institution, basic institutional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

Creating an Institutional Association

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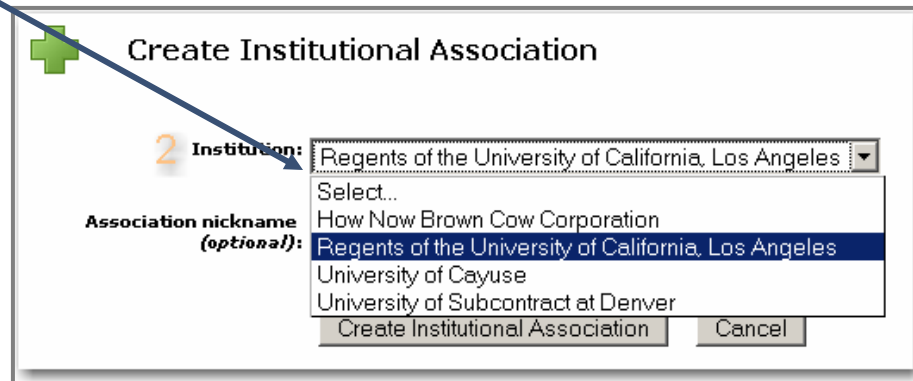
1. Click the [] icon located next to **Institutional Associations** within the Professional Profile



Creating an Institutional Association

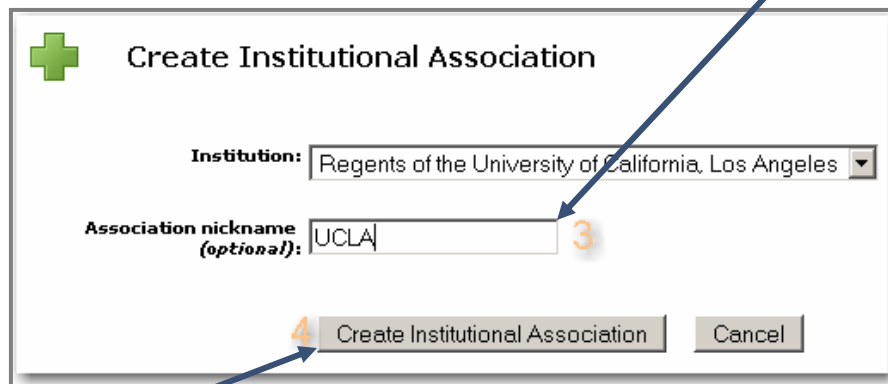
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2. Select the Institution using the drop-down menu



The screenshot shows the 'Create Institutional Association' form. A green plus icon is in the top left. The title 'Create Institutional Association' is at the top. Below it, the 'Institution:' label is followed by a dropdown menu. A blue arrow points to the dropdown menu, which is open and shows a list of institutions: 'Regents of the University of California, Los Angeles', 'Select..', 'How Now Brown Cow Corporation', 'Regents of the University of California, Los Angeles' (highlighted in blue), 'University of Cayuse', and 'University of Subcontract at Denver'. Below the dropdown are two buttons: 'Create Institutional Association' and 'Cancel'. A small orange '2' is next to the 'Institution:' label.

3. Select an Institutional nickname (optional)



The screenshot shows the 'Create Institutional Association' form. The 'Institution:' dropdown menu is now closed and shows 'Regents of the University of California, Los Angeles'. Below it, the 'Association nickname (optional):' label is followed by a text input field containing 'UCLA'. A blue arrow points to the input field, which has a small orange '3' next to it. Below the input field are two buttons: 'Create Institutional Association' and 'Cancel'. A small orange '4' is next to the 'Create Institutional Association' button.

4. Click the **Create Institutional Association** button

Completing the Professional Profile


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

The screenshot shows a web interface for a professional profile. It features a section titled "General Personal Information" with several blue hyperlinks: "Name" (with a right-pointing triangle), "Degrees", "Demographics", and "Biosketches". Below this is a section titled "1 Institutional Association" with a green plus sign to its right. Underneath, there is a red "X" icon followed by the text "Regents of the...". Below that is the text "Inst. association 'nickname'". At the bottom of the section are more blue hyperlinks: "Contact Info", "eRA Role", "Dept / Division / Title", and "Salary and Fringe Worksheet".

Completing the Professional Profile

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- Salary and Fringe Worksheet
 - If Appointment type is not entered into the Professional Profile, S2S Grants 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
 -  View the *Business Processes Document* in the Resources tab of your training handbook or the S2S Grants project website for more information

Attaching Biosketches

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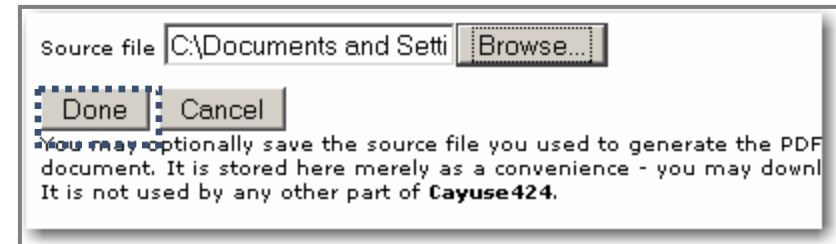
1. To upload a Biosketch to the Professional Profile click the [+] icon
2. Type in a name for the Biosketch and click **Next**
3. Click **Browse** to locate PDF version of Biosketch you've previously created
4. Click **Next**



Attaching Biosketches

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5. Repeat Step 3 to attach Source (Word) version of Biosketch (optional)
6. Click **Done**



The Attached Biosketch

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- ❑ 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
Josephine NIH	yes ↑	yes ↑	✖
Josephine NSF	yes ↑	yes ↑	✖

Managing Permissions

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- 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
- ☑ *All Users* are granted default permissions as well (please do not modify these)


	List	Read	Write	Autofill	Delete	Change Permissions	Add User/Group	Remove User/Group
 Gilbert, Cindy A (401293378)	<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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The profile creator can share the profile with other users by granting appropriate permissions

- Permissions can be changed or removed

Adding Permissions

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1. To grant permission(s) to other S2S Grants users click the [] icon
2. Click **Add user/group**
3. Scroll and select an individual user
4. Click **Close**

Permissions for Professional Profile: Bruin, Josephine



Type	Group or Username	Profile Name
G	SysAdmin	
G	AOR	
U	200940246	
U	adminuser	
U	alvarez	
U	aoruser	
U	cayuseadmin	
U	jakin	
U	kkhan	
U	slacantar	
U	sysadmin	
U	user1	
U	user2	
U	userN	
U	101000598	Abdou, Mohamed A.
U	601000770	Abedi, Marjan
U	501001143	Aberbach, Joel D.
U	200477647	Aberle, Denise R.
U	701001260	Abjani, Noor
U	000582395	Ackerman, Deborah
U	703636274	Adzhemyan, Ani
U	701003645	Aghaloo, Tara
U	700274497	Akaragian, Salpy
U	702975726	Alcantar, Suzette
U	700617645	Alejos, Juan C.
U	502571590	Allen, Laura B.
U	802743104	Allen-Auerbach, Martin
U	903635141	Almario, Mark

Adding Permissions

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

		List	Read	Write	Autofill	Delete	Change Permissions	Add User/Group	Remove User/Group
✘	AllUsers	<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"/>
✘	Jeng, Jackson (100739225)	<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"/>
✘	Aghaloo, Tara (701003645)	<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

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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

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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

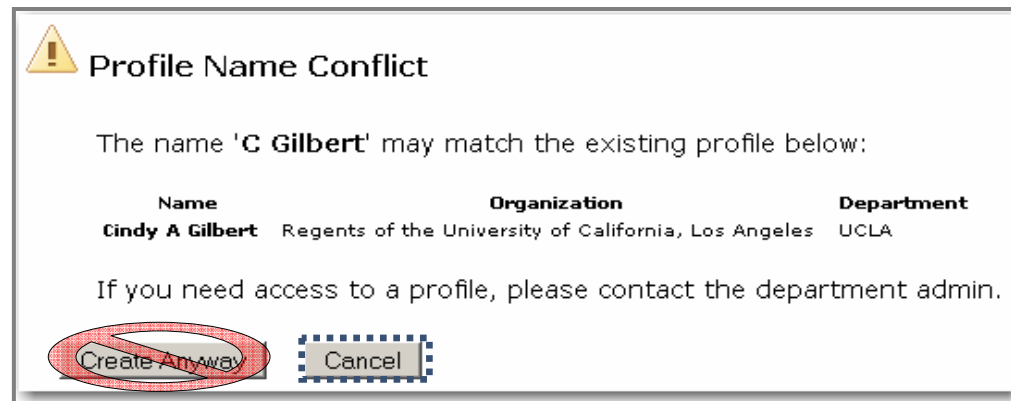
Remove/User Group

Allows the “User” to remove a user or group

Duplicate Professional Profiles

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- ❑ S2S Grants 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.



- ❑ Duplicate profiles should not be created. If you need to add an investigator who has multiple appointments, you should autofill the current profile, and then make the necessary changes within your proposal.

Conclusion

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- 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