Module 3

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
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

- 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

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

1. Login to S2S Grants and click the **People** tab

2. Click the [+] icon
3. Enter First and Last Name
4. Click the **Create New Profile** button
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.)
1. Click the [+] icon located next to Institutional Associations within the Professional Profile.
Creating an Institutional Association

2. Select the Institution using the drop-down menu

3. Select an Institutional nickname (optional)

4. Click the **Create Institutional Association** button
Compressing the Professional Profile

- Complete the following fields by clicking on the associated hyperlinks:
  - Name
  - Degrees
  - Demographics
  - Contact Information
  - eRA Role
  - Dept/Division/Title
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.
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.
5. Repeat Step 3 to attach Source (Word) version of Biosketch (optional)

6. Click Done
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.
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).

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 S2S Grants users click the [ 🖋 ] icon
2. Click Add user/group
3. Scroll and select an individual user
4. Click Close
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>
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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

- 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.

Profile Name Conflict

The name 'C Gilbert' may match the existing profile below:

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cindy A Gilbert</td>
<td>Regents of the University of California, Los Angeles</td>
<td>UCLA</td>
</tr>
</tbody>
</table>

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

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.
In this module you learned:

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- How to add biosketches
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