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Cayuse Professional Profiles

Everyone at UC Davis that will assist in proposal preparation, review proposals or serve as a Principal Investigator must have a Professional Profile in Cayuse 424. The Professional Profiles in Cayuse 424 contain the necessary information for accessing proposals in Cayuse SP and 424 and for routing and approval of Cayuse SP proposals. Keeping the Professional Profiles of people whom will serve as Key Personnel will mitigate Cayuse SP routing issues.

Access/Find a Professional Profile

   a. If you do not have a Kerberos, 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.

4. Determine if the person has a Professional Profile:
   a. If the person’s name is listed under "Recently Viewed, they have a Professional Profile. Do not create a new profile. Follow the instructions for updating a professional profile to review for accuracy and make any needed revisions.

   ![Image of the recently viewed list with names]

   b. If the name is not listed under Recently Viewed, type last name in the Search field and change the @ field to “The Regents at the University of California (Davis) – UC Davis” and then select “Search”.

   ![Image of the search page with search results]

   c. If person is not listed, they do not have a profile.
Create a Professional Profile

1. From the People/Professional Profile list, select the Add (+) Person button.

2. Complete the pop-up window and select Create New Profile.

3. Provide permissions/access to this Professional Profile by selecting the Permissions (key) icon.
a. Select the Add user to button to grant access to another person.

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

<table>
<thead>
<tr>
<th>Type</th>
<th>User</th>
<th>Profile Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>U</td>
<td>ipfapprover</td>
<td>Apple, Charlie</td>
</tr>
<tr>
<td>U</td>
<td>amieadmin</td>
<td>Admin, Amie</td>
</tr>
</tbody>
</table>

Show All

Select Users below to provide access to this Professional Profile.

Recently Used: 15 principals

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

Add Security Principal

test

Show All

Select Users below to provide access to this Professional Profile.

Recently Used: 15 principals

<table>
<thead>
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<td>U</td>
<td>amieadmin</td>
<td>Admin, Amie</td>
</tr>
</tbody>
</table>
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](image)

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](image)

4. 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 finish completing the profile.
5. Complete the following General Personal Information sections. Do not complete the Demographics and Biosketches sections.
   a. Name: Add the NIH Commons ID if the person will work on or submit proposals to the National Institutes of Health (NIH). Select Rename to change the name information.
   b. Degrees (Optional): Add relevant degree information.
6. Add the Institutional Association by selecting the plus (+) sign. This is a **critical** step as it associated the profile with UC Davis.

![Create Institutional Association](image)

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

7. Complete Contact Info section.

![Contact Info](image)

   Must use Zip+4 format
8. Complete the eRA Role section. This is a **critical** step for anyone that will use Cayuse 424 as it grants the relevant access/permissions in Cayuse 424.
   a. Principal Investigator: Any person that may be serve as a Lead Principal Investigator, co-Principal Investigator or any other investigator role on a proposal in Cayuse 424.
   b. Assistant: Anyone that may assist with proposal preparation in Cayuse 424.
   c. The other three roles are reserved for the Sponsored Programs office.

9. Complete the Department/Division/Tile 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.
10. Complete the Salary and Fringe Worksheet section.
   a. Employee ID: Enter the person’s UC Davis ID if known.
   b. 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.
   c. Select Import Institutional Rates, the select the appropriate rate type.

11. 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.
12. **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.**

   a. Select Routing Profile.
   b. Select the Next Reviewer icon to add a person to be added after the Lead Principal Investigator in the Cayuse 424 proposal routing chain.
   c. Enter the person’s last name in the search field and select “Search”.

![Routing Profile Image](image1)

![Next Reviewer Image](image2)
d. Select the person’s name under Search Results, and then select Set Next Reviewer.

![Set Next Reviewer](image)

Search Results:
Obelleiro, Kassie M (OVC - Sponsored Programs)

![Manage Routing Profile](image)

Establish others to approval proposals on your behalf.

e. Select Close when the routing chain is complete.
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.