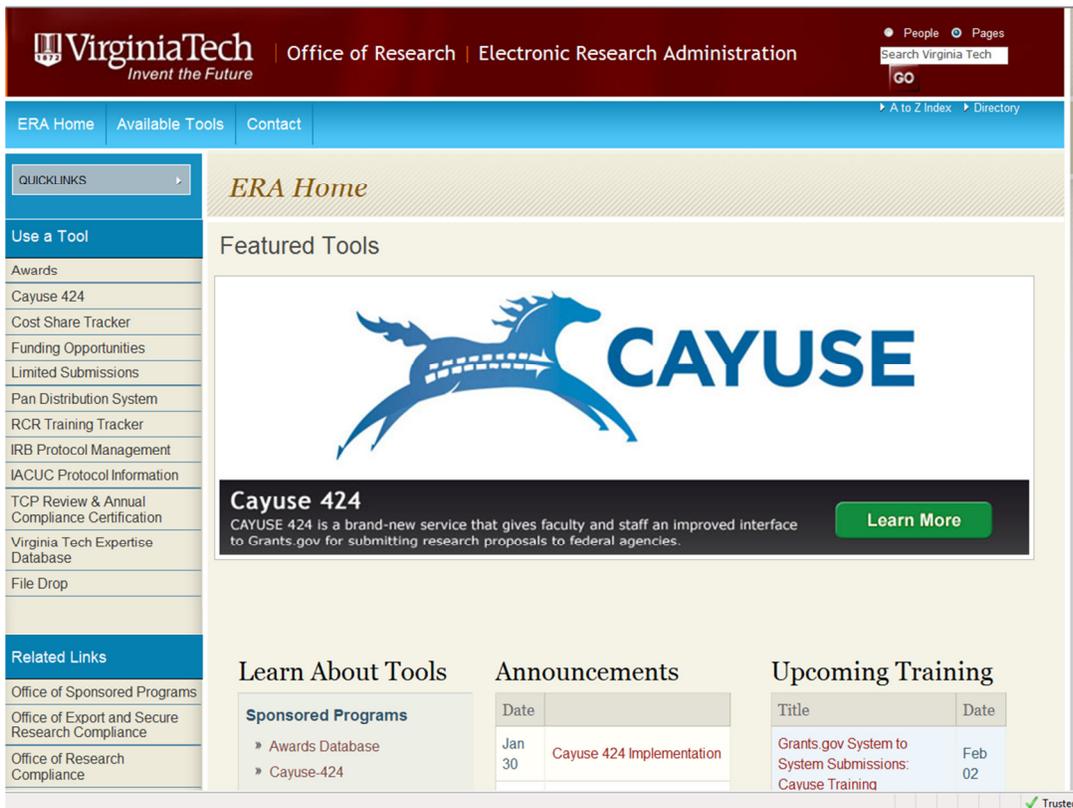


This handout is step by step instructions for a Principal Investigator (PI) to update their Professional Profile permissions in Cayuse 424 so that a staff person/business manager can be designated as a delegate. A delegate is a person that can enter and approve a proposal on behalf of the PI, if needed.

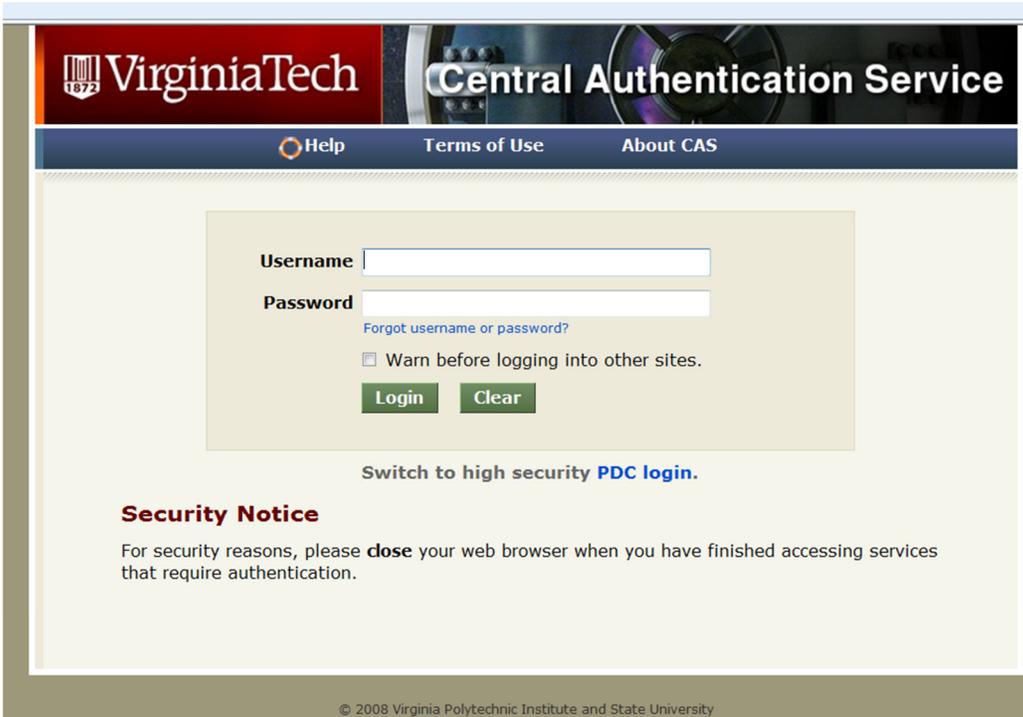
PI ENTRY

1. The PI can access the Cayuse production environment via the Office of Research Electronic Research Administration page. The link to this page is <http://www.research.vt.edu/era/> . The PI then selects Cayuse 424 under the Use a Tool section on the left side of the page.



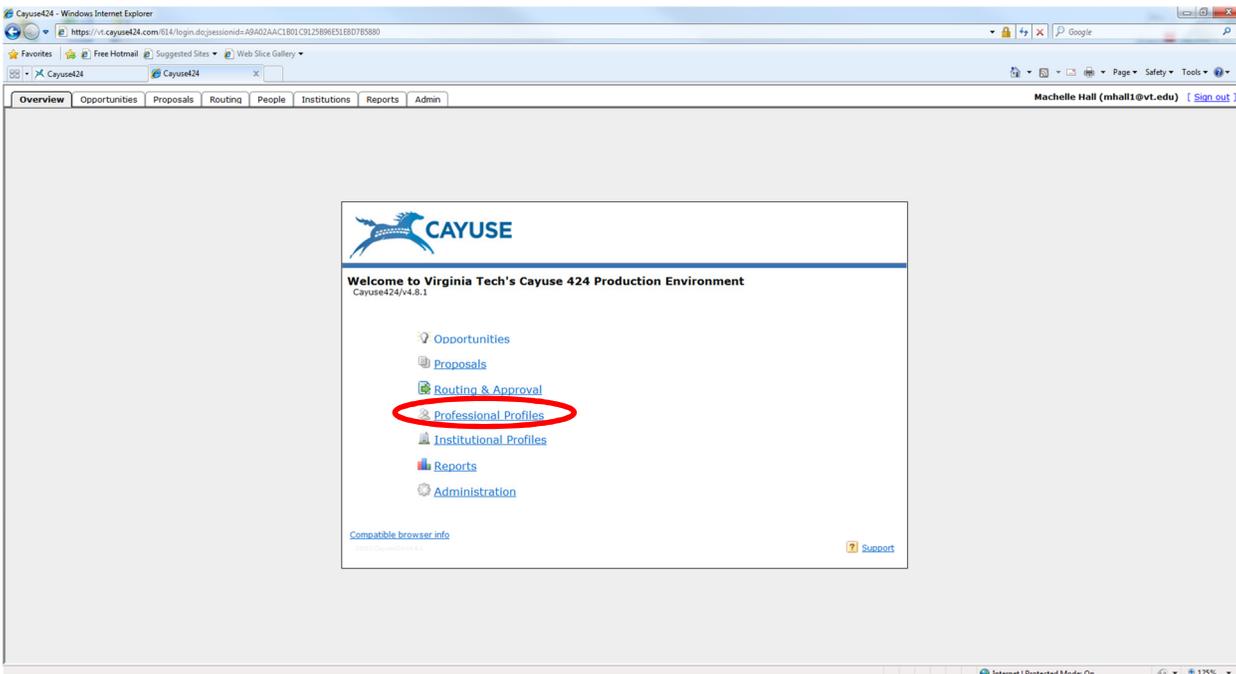
## Cayuse 424 Training – VT PI Update Professional Profile

2. The PI signs on to the production environment of Cayuse 424 through the Central Authentication Service (CAS).
  - a. Enter your PID in the Username field
  - b. Enter your CAS password in the Password field – the password that is used to get to Human Resources information such as pay stub



The screenshot shows the Virginia Tech Central Authentication Service (CAS) login page. At the top left is the Virginia Tech logo with the year 1872. To its right is the text "Central Authentication Service". Below this is a navigation bar with links for "Help", "Terms of Use", and "About CAS". The main content area features a login form with fields for "Username" and "Password". Below the password field is a link for "Forgot username or password?". There is a checkbox for "Warn before logging into other sites." and two buttons: "Login" and "Clear". Below the form, there is a link to "Switch to high security PDC login." and a "Security Notice" section. The notice states: "For security reasons, please close your web browser when you have finished accessing services that require authentication." At the bottom of the page, there is a copyright notice: "© 2008 Virginia Polytechnic Institute and State University".

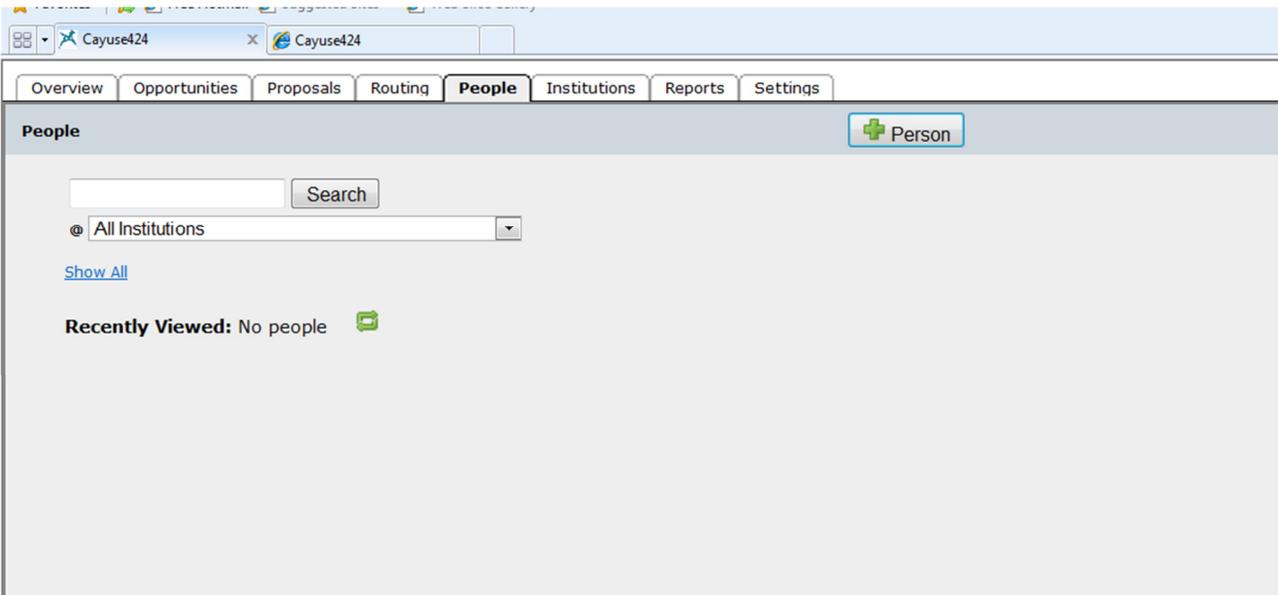
3. Select the [Professional Profiles](#) link in the middle of the screen.



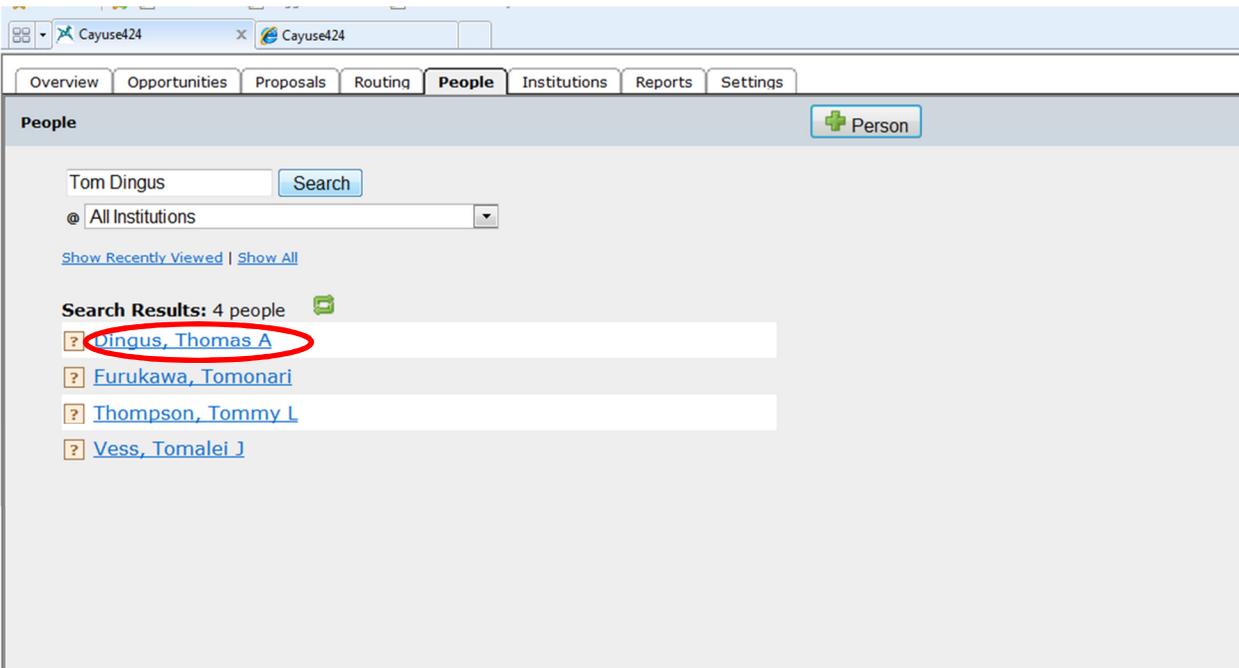
The screenshot shows the Cayuse 424 Production Environment dashboard. The browser window title is "Cayuse424 - Windows Internet Explorer". The address bar shows the URL: "https://vt.cayuse424.com/014/login.do?sessionid=AB402AAC1B01CB125B9651E80785880". The dashboard has a navigation menu at the top with links for "Overview", "Opportunities", "Proposals", "Routing", "People", "Institutions", "Reports", and "Admin". The user is logged in as "Machelle Hall (mhall1@vt.edu)" with a "Sign out" link. The main content area features the Cayuse logo and a welcome message: "Welcome to Virginia Tech's Cayuse 424 Production Environment" with the version "Cayuse424/v4.0.1". Below this is a list of menu items: "Opportunities", "Proposals", "Routing & Approval", "Professional Profiles" (highlighted with a red circle), "Institutional Profiles", "Reports", and "Administration". There are also links for "Compatible browser info" and "Support". The status bar at the bottom indicates "Internet | Protected Mode: On" and a zoom level of "125%".

## Cayuse 424 Training – VT PI Update Professional Profile

4. Type your name in the Search field and click on the Search button.

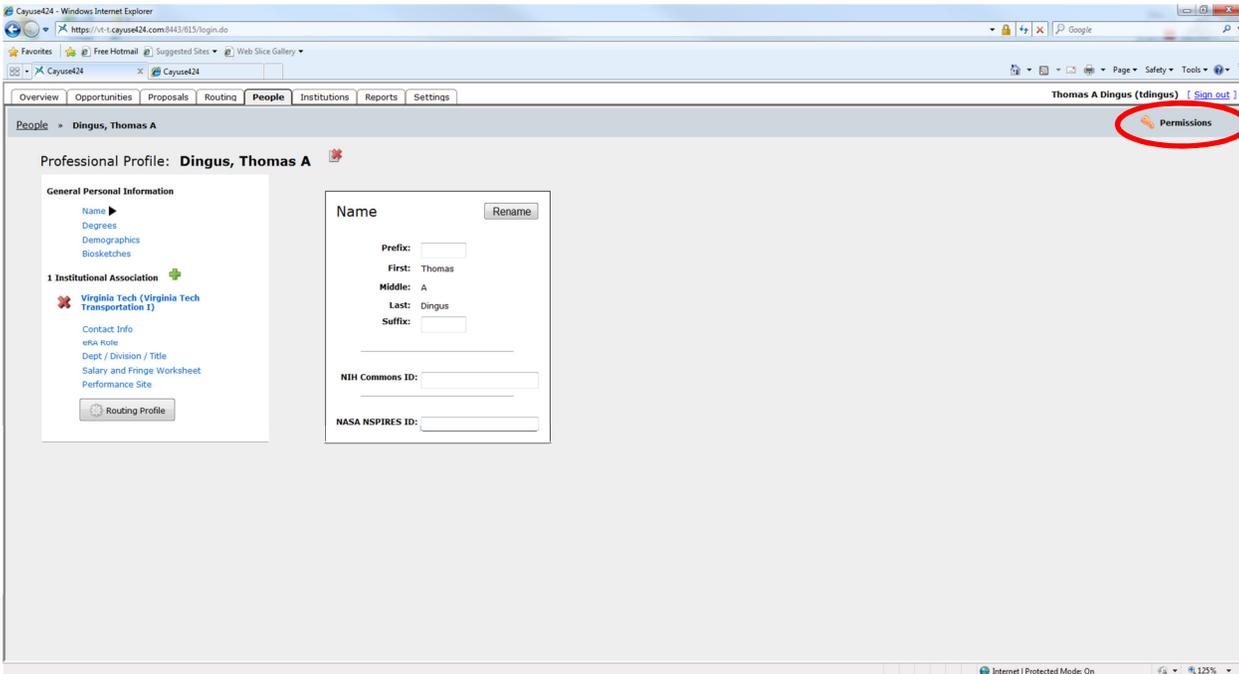


5. The search will bring back Search Results. Click on the link with your name.

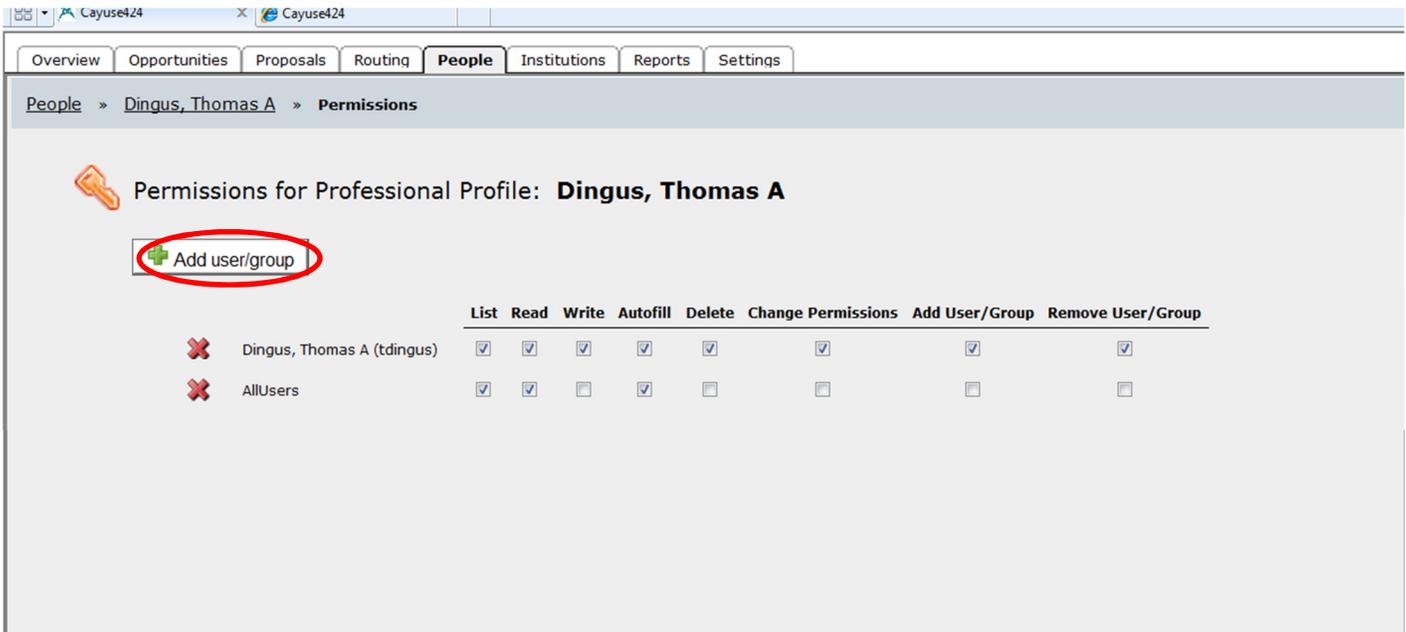


# Cayuse 424 Training – VT PI Update Professional Profile

- 6. When the Professional Profile screen displays, select the Permissions icon at the top right corner of the screen. It is a red/yellow Key.

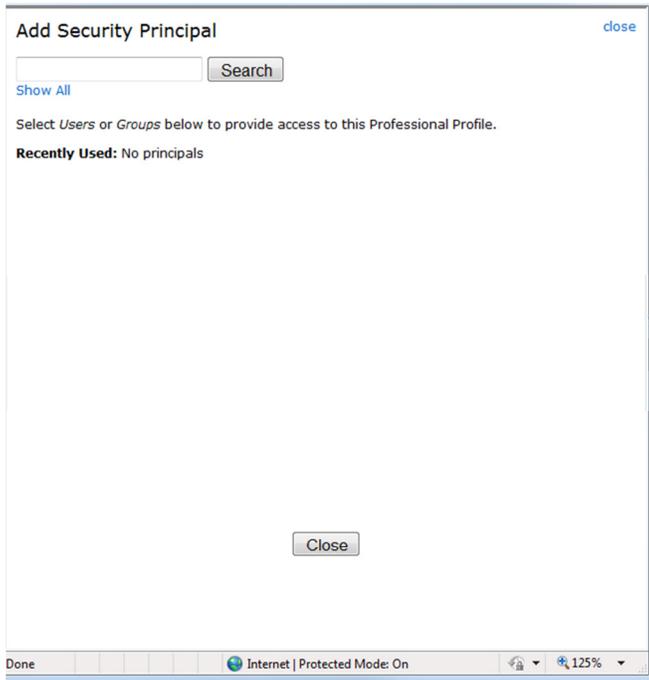


- 7. On the Permissions for Professional Profile screen, click the Add user/group button.

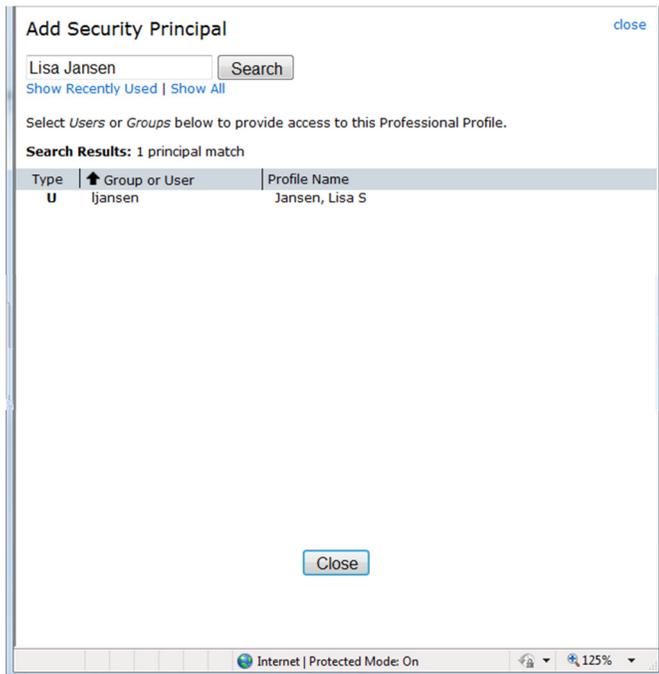


## Cayuse 424 Training – VT PI Update Professional Profile

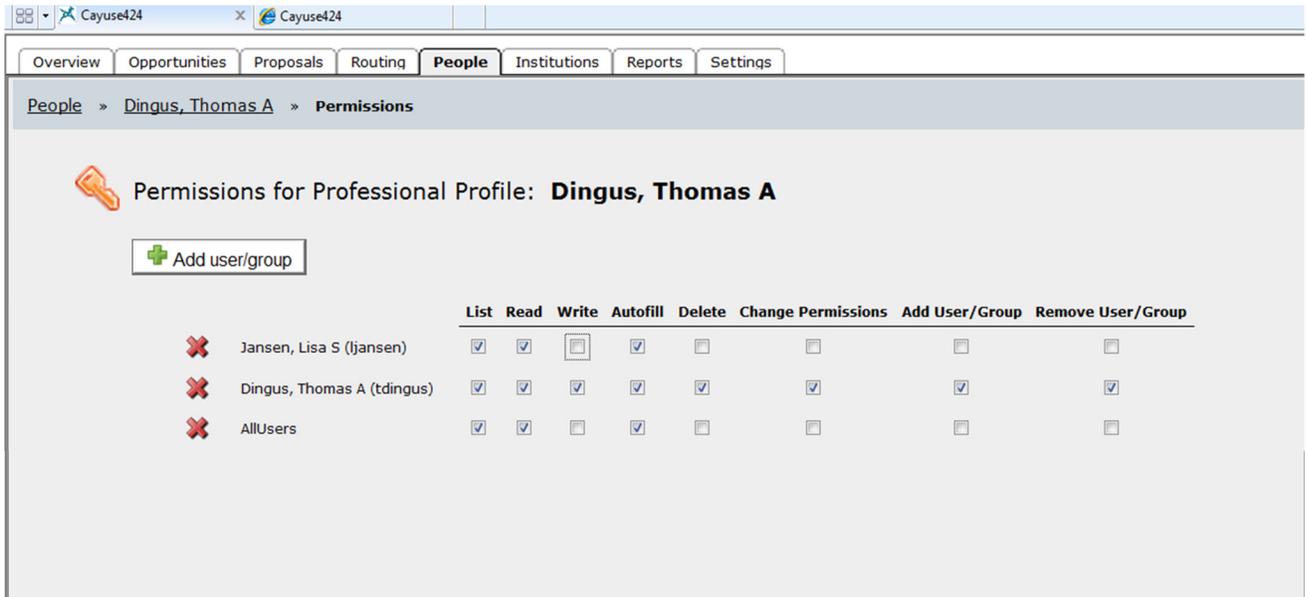
8. The Add Security Principal screen displays, type in the person's name that you want to give update capabilities to your Professional Profile in the Search field and click the Search button.



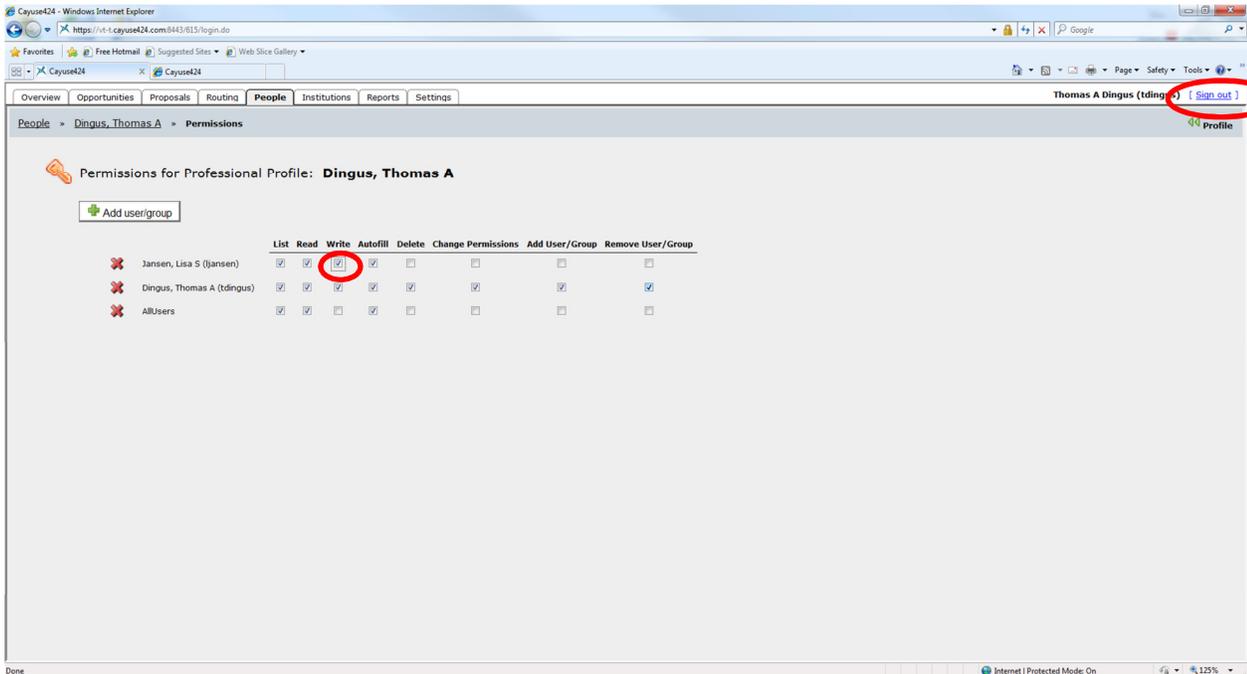
9. The Search Results display, select the correct person from the search results by clicking on their name. The name should then appear behind the pop-up window and you can close the Add Security Principal window by clicking the Close button.



10. The added name will appear on the Permissions for the Professional Profile screen.



11. The PI clicks the checkbox next to the added person's name and under Write. This permission will give that user the ability to update the PI's professional Profile and add themselves as a Delegate.

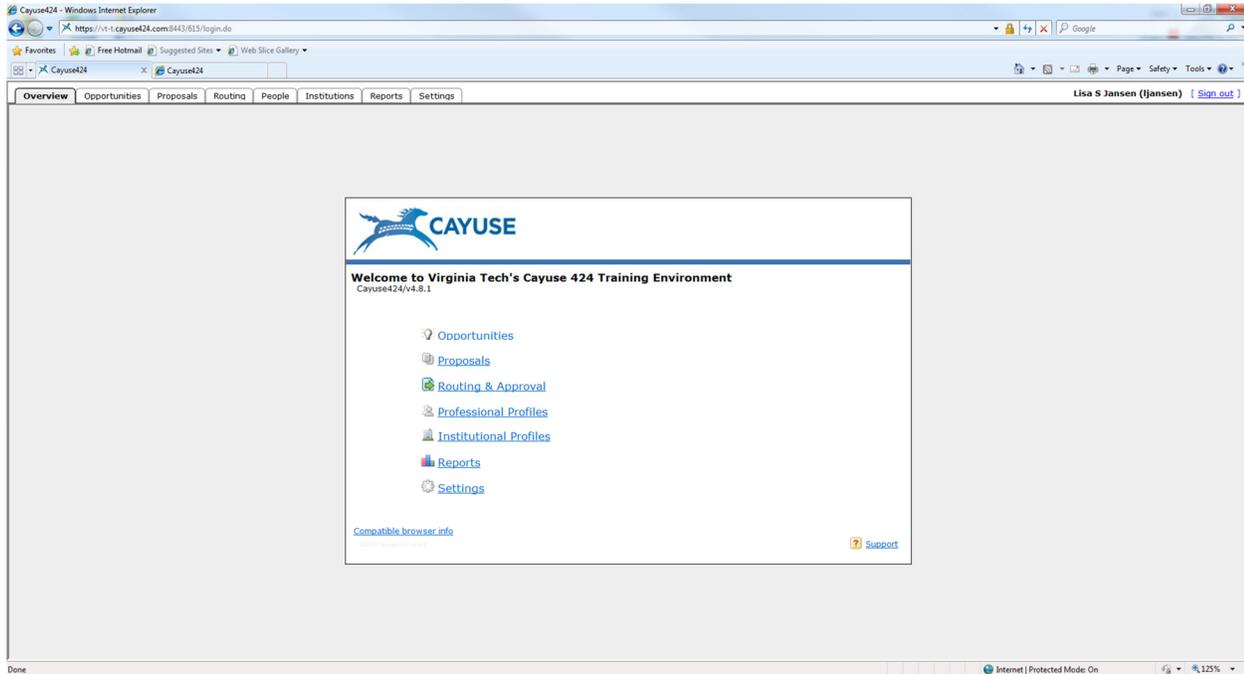


12. The PI can then Sign Out by clicking the Sign out link in the top right corner.

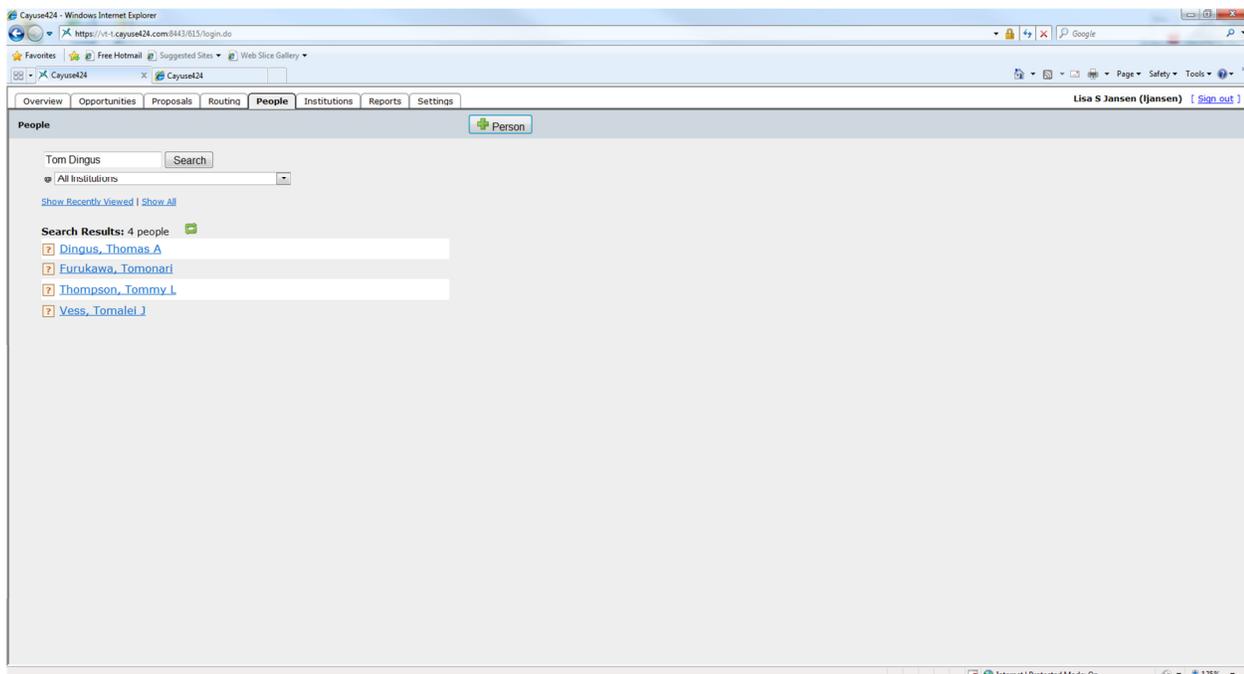
## Cayuse 424 Training – VT PI Update Professional Profile

### DELEGATE ENTRY

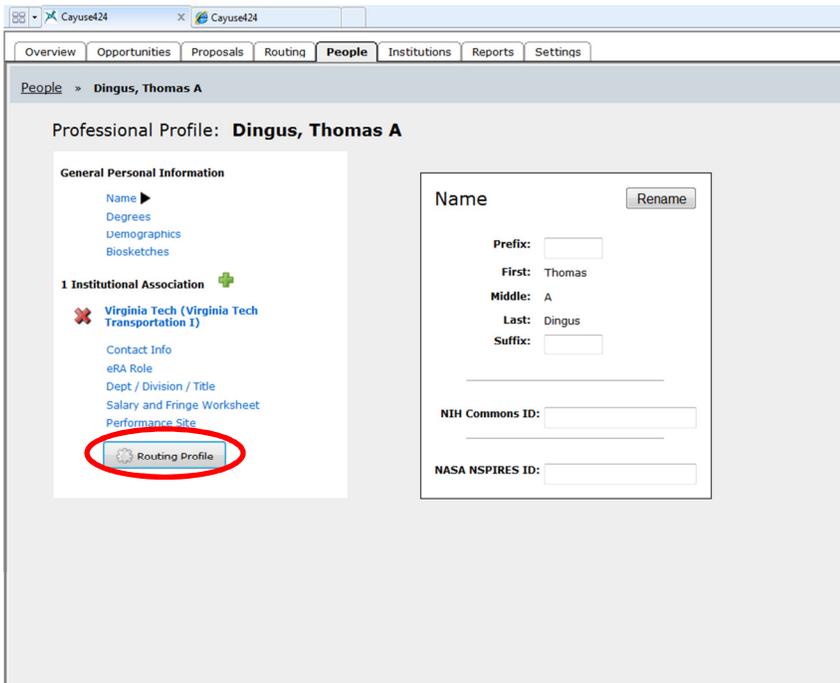
13. After the PI completes his/her entry, the departmental staff person or Business Manager then signs on to production and make themselves a delegate for this PI.
14. From the Cayuse 424 Main Menu, select the [Professional Profiles](#) link.



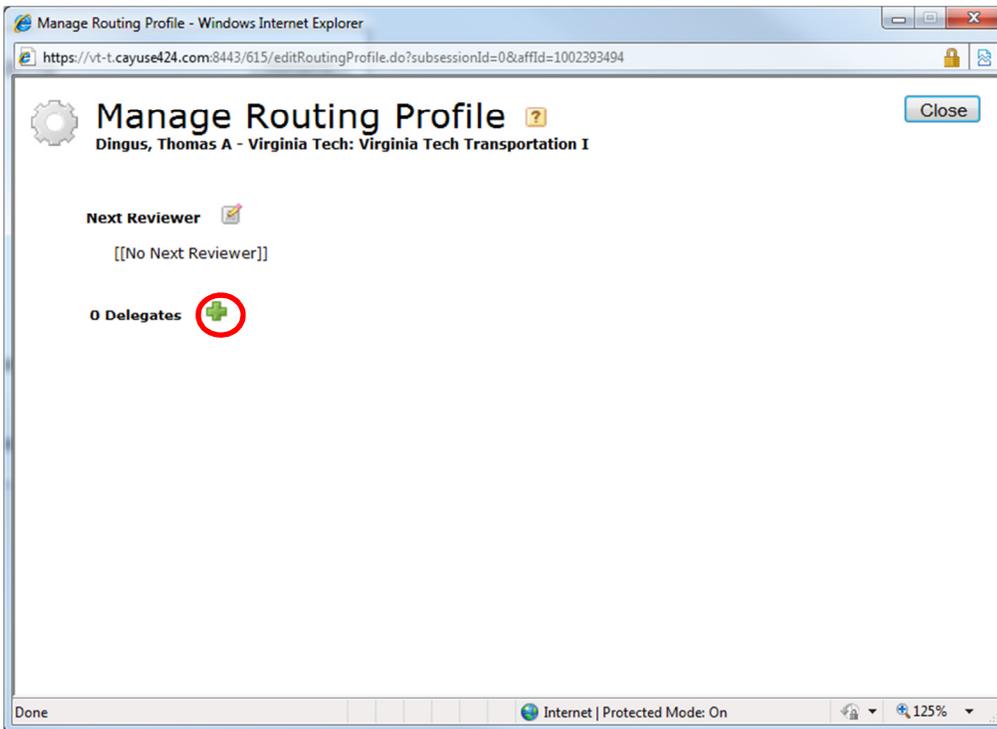
15. When the People Search Screen displays, search for the needed PI by entering their name in the Search field. Select the PI from the Search Results by clicking on the link for the needed PI.



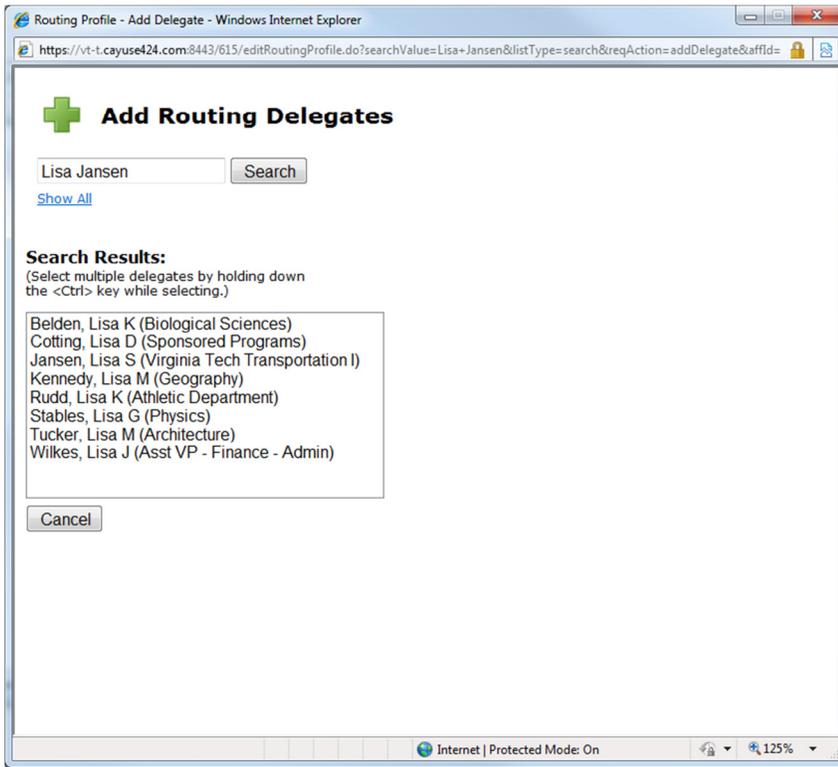
16. When the Profession Profile displays for the needed PI, click the Routing Profile button at the bottom of the left hand navigation pane.



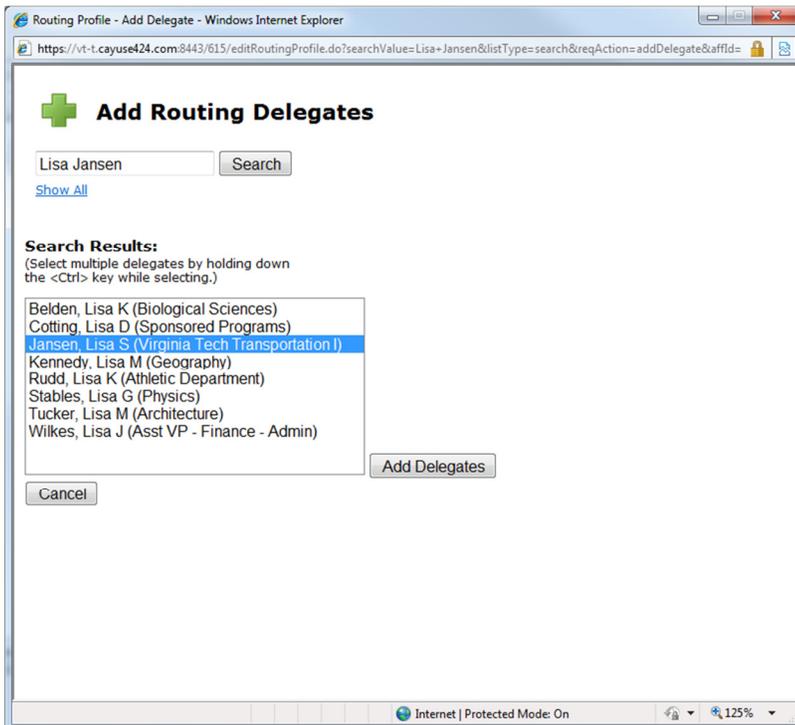
17. When the Manage Routing Profile screen displays, Click the Add icon which is the green plus sign next to the word Delegates.



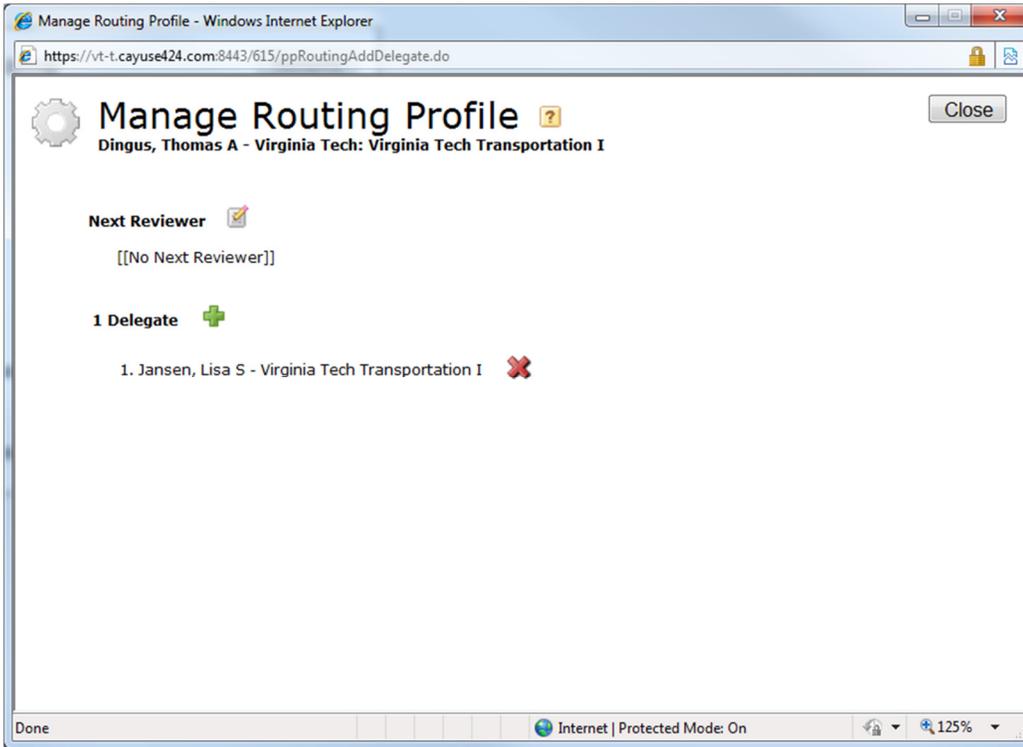
18. When the Add Routing Delegates screen displays, search for you name and select it from the Search Results by clicking on the name.



19. When the name is highlighted, an Add Delegate button displays. Click on that button to add needed person as a delegate.



20. The person added now displays on the Manage Routing Profile as a Delegate.



21. The departmental staff person/business manager now has update capabilities to the Professional Profile of the PI and delegate authority which will allow them to approve a proposal in Cayuse 424, if needed.